



## Rating Phase for Employees

### Self-Accomplishment Narratives

The *Element Self-Accomplishment Narrative* pertains to individual elements while the *Employee Self-Accomplishment Narrative* pertains to the entire plan and is a summary of all accomplishments.

Self-accomplishment narratives may be required, optional, *or* not available depending on each individual Agency's specific guidelines. Refer to agency policy for further guidance. These instructions provide steps for adding narratives when it is required *or* optional.

The *Employee Self-Accomplishment Narrative* can be accessed immediately after employees sign in **Part 1. Employee Input**. The narratives may be released to the Rating Official after all signatures in **Part 2. Progress Review** are complete.

1. From the **Dashboard** page, click **Complete and Release My [Year] Self-Accomplishment Narrative**. The link will indicate if it is optional.
2. The plan will open.

USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

**Part 1. Employee Input** *I have reviewed this plan and have been consulted on its development.* ☒ Eligible for eOPF Plan Status: Active

Employee Name (Last, First, Middle): **Monroe, Elias** \*Appraisal Pd. 10/1/2022 - 9/30/2023

Title: Employee Series: (No Se) Pay Plan: GS Grade: (No)

Organization: **Human Resources**

Supervisory Code: 8 - All Other Positions \*Plan Purpose: Annual

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Date: 1/6/2023

Originally signed by Adalyn Malone on 1/6/2023

Employee's Signature: Electronically signed by MONROE, ELIAS Remove Signature Date: 1/6/2023

Originally signed by Elias Monroe on 1/6/2023

## Complete Element Self-Accomplishment Narratives

1. To add an *Element Self-Accomplishment Narrative*, scroll to **Part 7. Performance Elements** or click **Performance Elements** on the navigation bar to view the performance elements.

USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions **Performance Elements** Narratives Documents Notes Signature History Save Print Profile

Part 7. Performance Elements

**Customer Service** ☒ Critical

**Strategic Alignment:** Strategic Goal 3: Improve integration and communication of HR services to Federal agencies to meet emerging needs

Works with clients and customers (that is, any individuals who use or receive services or products that your work unit produces, including the general public, individuals who work in the agency, other agencies, or organizations outside the Government) to assess their needs, provide information or assistance, resolve their problems, or satisfy their expectations; knows about available products and services; is committed to providing quality products and services. Minor change to element for FY21.

**Fully Successful:**  
Meets competency definition and has brief contact with customers with limited needs. Provides routine information about products and services. Provides standard products or routine services to customers. Resolves simple problems, questions, or complaints; directs complex or non-routine problems, questions, or complaints to the appropriate person.

**Exceeds Fully Successful:**  
Meets competency definition and maintains relationships with customers with diverse needs. Provides moderately technical or complex information about products or services. Assesses customers' needs and identifies or tailors products and/or services to meet their needs. Resolves fairly complex or nonroutine problems, questions, or complaints; directs the most complex problems, questions, or complaints to the appropriate person.

Employee Element Self-Accomplishment Narrative: [Edit](#)

Customer Service Rating Levels:

2. Click **Edit** for the appropriate corresponding *Employee Element Self-Accomplishment Narrative*.

USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions **Performance Elements** Narratives Documents Notes Signature History Save Print Profile

Part 7. Performance Elements

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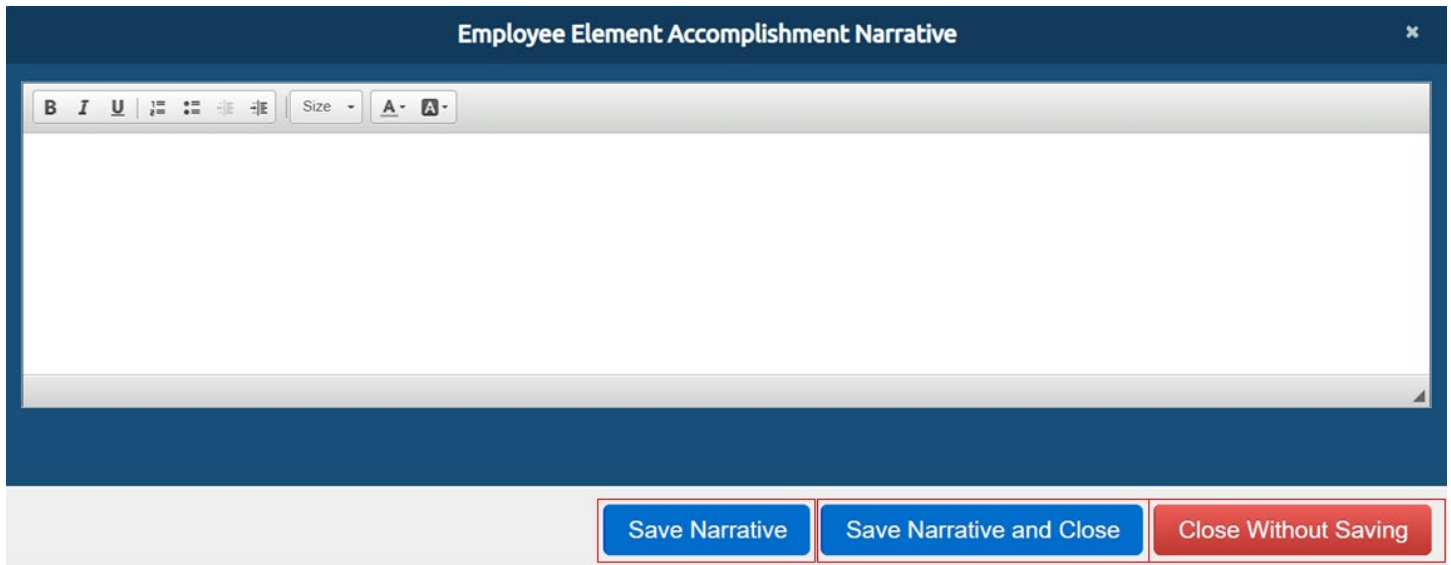
**Fully Successful:**  
Meets competency definition and has brief contact with customers with limited needs. Provides routine information about products and services. Provides standard products or routine services to customers. Resolves simple problems, questions, or complaints; directs complex or non-routine problems, questions, or complaints to the appropriate person.

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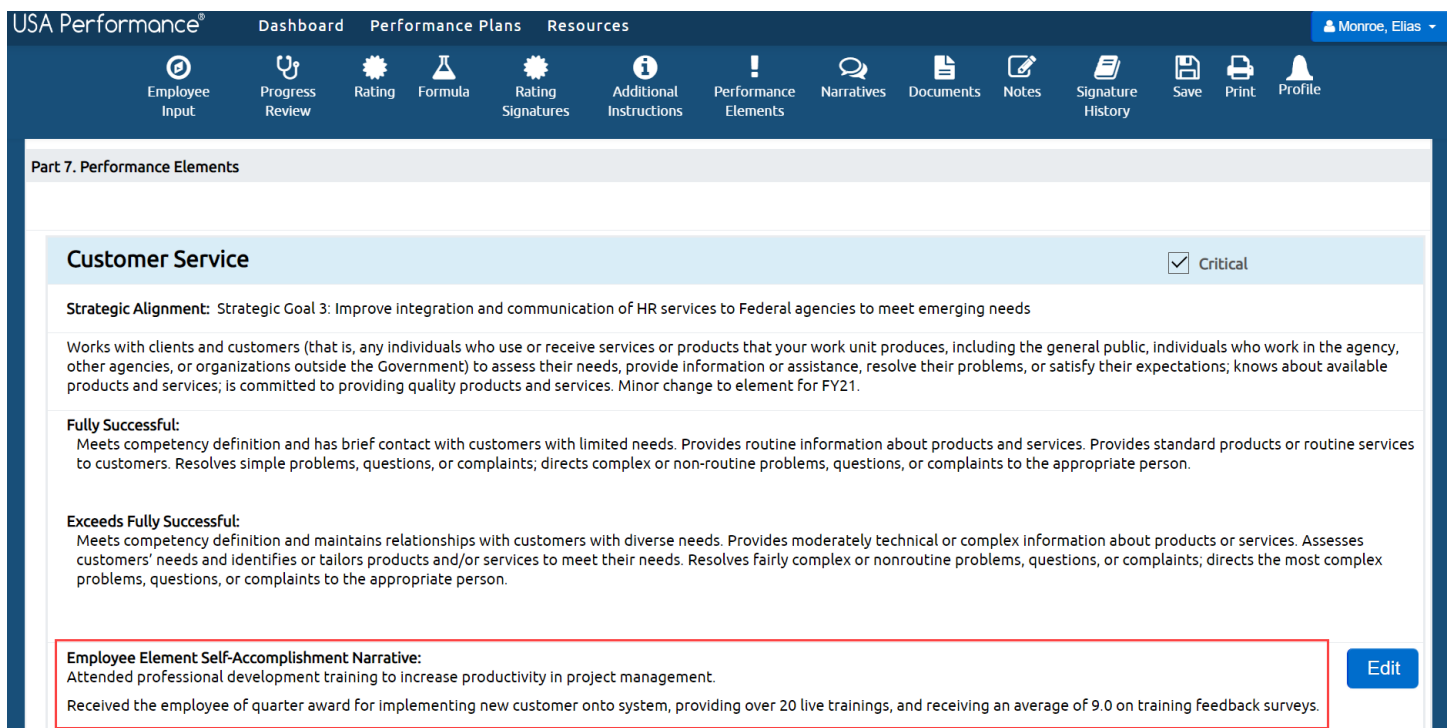
Employee Element Self-Accomplishment Narrative: [Edit](#)

Customer Service Rating Levels:

3. Type your narrative in the *Employee Element Accomplishment Narrative* text box. You may edit the text style by using the rich text editor selections. Click **Save Narrative**, **Save Narrative and Close** or **Close Without Saving**.



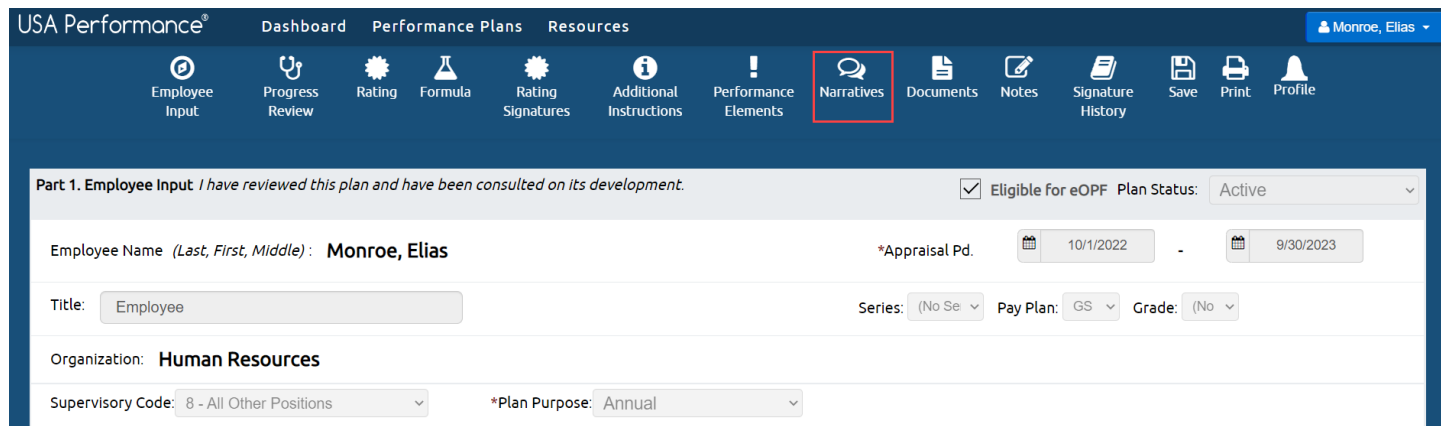
4. The narrative will appear in the *Employee Element Self-Accomplishment Narrative* text box. If updates are needed, click **Edit** to open the text box and repeat the process.



5. Click **Save** on the navigation bar.

## Complete Employee Self-Accomplishment Narrative

1. To add an *Employee Self-Accomplishment Narrative*, scroll to **Part 9. Employee Self-Accomplishment Narrative** or click **Narratives** on the navigation bar.



USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements **Narratives** Documents Notes Signature History Save Print Profile

Part 1. Employee Input *I have reviewed this plan and have been consulted on its development.* ☒ Eligible for eOPF Plan Status: Active

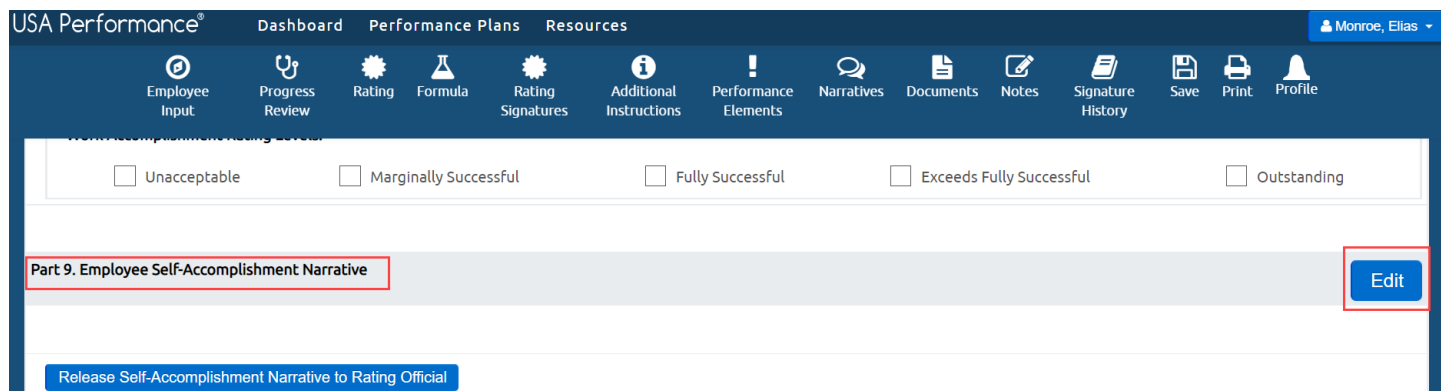
Employee Name (Last, First, Middle): Monroe, Elias \*Appraisal Pd. 10/1/2022 - 9/30/2023

Title: Employee Series: (No Se) Pay Plan: GS Grade: (No)

Organization: Human Resources

Supervisory Code: 8 - All Other Positions \*Plan Purpose: Annual

2. Click **Edit** next to **Part 9. Employee Self-Accomplishment Narrative**.



USA Performance® Dashboard Performance Plans Resources Monroe, Elias

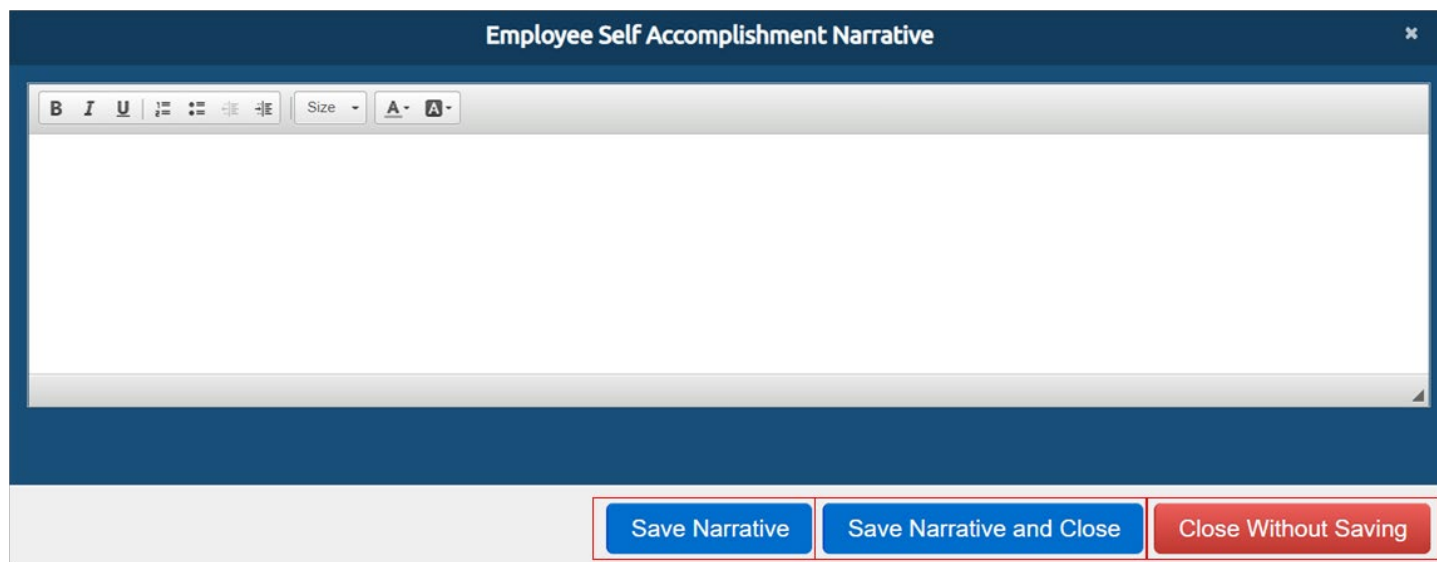
Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

☐ Unacceptable ☐ Marginally Successful ☐ Fully Successful ☐ Exceeds Fully Successful ☐ Outstanding

Part 9. Employee Self-Accomplishment Narrative **Edit**

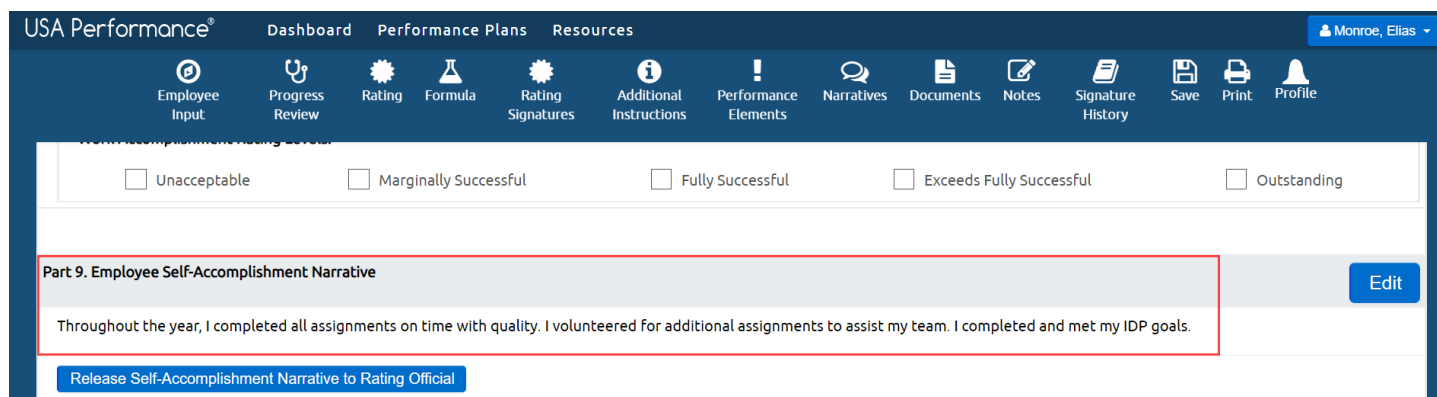
Release Self-Accomplishment Narrative to Rating Official

3. Type your narrative in the *Employee Self Accomplishment Narrative* text box. You may edit the text style by using the rich text editor selections. Click **Save Narrative**, **Save Narrative and Close** or **Close Without Saving**.



The screenshot shows a dialog box titled "Employee Self Accomplishment Narrative" with a close button (X) in the top right corner. Inside the dialog is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, text color, and background color. Below the toolbar is a large text area for entering the narrative. At the bottom of the dialog are three buttons: "Save Narrative" (blue), "Save Narrative and Close" (blue), and "Close Without Saving" (red).

4. The narrative will appear in **Part 9. Employee Self-Accomplishment Narrative** text box. If updates are needed, click **Edit** to open the text box and repeat the process.



The screenshot shows the "USA Performance" system interface. The top navigation bar includes "Dashboard", "Performance Plans", and "Resources", along with a user profile "Monroe, Elias". Below the navigation bar is a row of icons for various functions: Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives, Documents, Notes, Signature History, Save, Print, and Profile. The main content area shows a section for "Part 9. Employee Self-Accomplishment Narrative" with a red border. Inside this section, there is a text box containing the narrative: "Throughout the year, I completed all assignments on time with quality. I volunteered for additional assignments to assist my team. I completed and met my IDP goals." To the right of the text box is an "Edit" button. Below the text box is a button labeled "Release Self-Accomplishment Narrative to Rating Official". Above the text box, there are five radio button options for performance ratings: "Unacceptable", "Marginally Successful", "Fully Successful", "Exceeds Fully Successful", and "Outstanding".

5. Click **Save** on the navigation bar.

## Release Self-Accomplishment Narratives

1. To share narratives with your Rating Official, click **Release Self-Accomplishment Narrative to Rating Official**.

The screenshot shows the USA Performance interface. At the top, there's a navigation bar with 'USA Performance®', 'Dashboard', 'Performance Plans', and 'Resources'. Below this is a toolbar with icons for 'Employee Input', 'Progress Review', 'Rating', 'Formula', 'Rating Signatures', 'Additional Instructions', 'Performance Elements', 'Narratives', 'Documents', 'Notes', 'Signature History', 'Save', 'Print', and 'Profile'. The main content area has a header with five radio buttons: 'Unacceptable', 'Marginally Successful', 'Fully Successful', 'Exceeds Fully Successful', and 'Outstanding'. Below this is a section titled 'Part 9. Employee Self-Accomplishment Narrative' with an 'Edit' button. The narrative text reads: 'Throughout the year, I completed all assignments on time with quality. I volunteered for additional assignments to assist my team. I completed and met my IDP goals.' At the bottom of this section, the button 'Release Self-Accomplishment Narrative to Rating Official' is highlighted with a red box.

2. You will be asked to confirm your action. Click **Yes**.

This screenshot shows the same interface as the previous one, but with a confirmation dialog at the bottom. The dialog asks: 'Are you sure you want to notify your Rating Official that your self-accomplishment narrative is complete?'. There are two buttons: 'Yes' (highlighted with a green box) and 'No' (highlighted with a red box).

3. The date of release will appear in **Part. 9 Employee Self-Accomplishment Narrative**.

This screenshot shows the 'Part 9. Employee Self-Accomplishment Narrative' section after the release action. The narrative text is the same as before. Below the text, there is a blue button labeled 'Unrelease Self-Accomplishment Narrative from Rating Official'. Below that, the text 'Released to Rating Official on 1/9/2023' is displayed and highlighted with a red box.

4. If needed, you may unrelease your self-accomplishment narrative by clicking **Unrelease Self-Accomplishment Narrative from Rating Official**.

The screenshot shows the USA Performance interface. At the top, there's a navigation bar with 'USA Performance®', 'Dashboard', 'Performance Plans', and 'Resources'. On the right, a user profile for 'Monroe, Elias' is visible. Below the navigation bar is a toolbar with icons for 'Employee Input', 'Progress Review', 'Rating', 'Formula', 'Rating Signatures', 'Additional Instructions', 'Performance Elements', 'Narratives', 'Documents', 'Notes', 'Signature History', 'Save', 'Print', and 'Profile'. The main content area has a section titled 'Work Accomplishment Rating Levels' with five radio buttons: 'Unacceptable', 'Marginally Successful', 'Fully Successful', 'Exceeds Fully Successful', and 'Outstanding'. Below this is 'Part 9. Employee Self-Accomplishment Narrative' with a text area containing the narrative: 'Throughout the year, I completed all assignments on time with quality. I volunteered for additional assignments to assist my team. I completed and met my IDP goals.' A blue button labeled 'Unrelease Self-Accomplishment Narrative from Rating Official' is highlighted with a red box. Below the button, it says 'Released to Rating Official on 1/9/2023'.

5. You will be asked to confirm your action. Click **Yes**. The Rating Official will no longer be able to see your self-accomplishment narrative.

This screenshot shows the same USA Performance interface as the previous one, but with a confirmation dialog at the bottom. The dialog asks 'Are you sure you want to unrelease your self-accomplishment Narrative?' and has two buttons: 'Yes' (highlighted with a red box) and 'No'. Above the dialog, the 'Unrelease Self-Accomplishment Narrative from Rating Official' button is still visible, and the text 'Released to Rating Official on 1/9/2023' is present. A small tooltip above the 'Yes' button shows 'Last Note: 1/6/2023 4:49:26 PM'.

## Sign Your Performance Plan Rating

After the Rating Official and Reviewing Official (if required) have signed your plan in the rating phase, the Rating Official will release your rating to you. You may then view any available performance element ratings, narratives and your final rating. Once you have reviewed the ratings, you may sign your plan.

1. From the **Dashboard** page, click **Sign My [Year] Rating**.

The screenshot shows the 'USA Performance' dashboard for user 'Monroe, Elias'. The top navigation bar includes 'Dashboard', 'Performance Plans', and 'Resources'. The user's name 'Monroe, Elias' is in the top right. Below the navigation bar, the 'Dashboard' section is visible. On the left, under 'Tasks Requiring My Attention', there is a section 'My Active Plans' with a link 'Sign My 2022 Rating' highlighted by a red box. On the right, under 'Quick Links', there are links for 'Performance Plan' (View My 2022 Plan (On Hold), View My 2022 Plan (Active), View My 2021 Plan (Completed)) and 'Help' (Contact the Help Desk).

2. The plan will open.
3. To view the final rating, scroll to **Part 5. Rating Signatures** or click **Rating Signatures** on the navigation bar.

The screenshot shows the 'Part 1. Employee Input' form in the USA Performance system. The top navigation bar includes 'Dashboard', 'Performance Plans', and 'Resources'. The user's name 'Monroe, Elias' is in the top right. Below the navigation bar, the 'Rating Signatures' icon is highlighted with a red box. The form itself is titled 'Part 1. Employee Input: I have reviewed this plan and have been consulted on its development.' and includes a checkbox for 'Eligible for eOPF' and a dropdown for 'Plan Status: Active'. The form fields include: 'Employee Name (Last, First, Middle): Monroe, Elias', '\*Appraisal Pd.' with dates '10/1/2022' and '9/30/2023', 'Title: Employee', 'Series: (No Se)', 'Pay Plan: GS', 'Grade: (No)', 'Organization: Human Resources', and 'Supervisory Code: 8 - All Other Positions' with a dropdown. The '\*Plan Purpose:' is set to 'Annual'.



4. In **Part 5. Rating Signatures** click **Sign**.

USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Part 5. Rating Signatures

☐ Request Reviewing Official

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Date: 1/10/2023

Employee's Signature: [Redacted] **Sign** Date: [Redacted]

Employee's Comments: [Redacted] **Edit**

5. You will be asked to confirm your action. Click **Yes**.

USA Performance® Dashboard Performance Plans Resources Richard, Kaden

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

✖ Denotes PE not included in Rating Calculations

Part 5. Rating Signatures

☐ Request Reviewing Official

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Date: 9/27/2023

Employee's Signature: [Redacted] **Sign** Date: [Redacted]

*Signing the plan will release any comments you have entered to all parties with access to your plan. Your signature certifies that you have reviewed your rating and not necessarily that you agree with it. Are you sure you wish to sign at this time?*

**Yes** No

6. Your signature now shows on the plan.

USA Performance® Dashboard Performance Plans Resources Monroe, Elias

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Part 5. Rating Signatures

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Date: 1/10/2023

Employee's Signature: Electronically signed by MONROE, ELIAS Date: 1/10/2023

7. You are not able to remove your signature once the plan has been fully signed in the Rating Phase. If you need to remove your signature, please contact your administrator.

8. If your performance management process includes a third level review, the Rating Official, Reviewing Official, Performance Appraisal Certifier and employee will sign in order as determined by the Agency. You will also see an additional *Performance Appraisal Certifier Signature* block.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

Employee Input Progress Review Rating Formula Rating Signatures Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

✖ Denotes PE not included in Rating Calculations

**Part 5. Rating Signatures**

Reviewing Official's Signature:	<input type="text" value="(Required)"/>	Date:	<input type="text"/>
Rating Official's Signature:	<input type="text" value="Electronically signed by MALONE, ADALYN (Rating Official)"/> <span>Remove Signature</span>	Date:	<input type="text" value="1/10/2023"/>
Employee's Signature:	<input type="text"/>	Date:	<input type="text"/>
Performance Appraisal Certifier Signature:	<input type="text"/>	Date:	<input type="text"/>