



Performance Appraisals

This guide is for administrators with the **Performance Appraisals** permission. This permission allows administrators to create, view, and edit performance appraisals for their assigned organization and subordinate organizations.

This guide will address the initial creation of performance plans and the following various administrative tasks associated with plan changes.

- Create a Performance Plan
- Create a Performance Plan – Special Circumstances
- Open a Performance Plan
- Update Part 1: Employee Input after Planning Signatures
- Bypass Employee Signatures
- Remove Signatures in Plan
- Manage Notes in a Performance Plan
- Advance a Plan to the Rating Phase
- Executive Accomplishment Narratives
- Non-SES Accomplishment Narratives
- Release a Plan with No Employee Self Accomplishment Narrative
- Update Plan Status

For further information regarding establishing templates and settings, SES performance management cycles, non-SES rating cycle groups, or plan editing and issuance guidance, please see the applicable corresponding guides.

Create a Performance Plan

Performance plans can be initiated by employees, rating officials or administrators from the **Performance Management** tab. The **Performance Management** tab will only populate employees that have been assigned to a rating cycle group and template.

1. Click **Performance Management**.

USA Performance® Home **Performance Management** Admin Reports Resources Alfonso, Amber

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year
None selected

Plan Status
None selected

Phase
None selected

Pay Plan
None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Show Performance Plans

Search Reset
Pressing Enter will perform the search. Pressing Esc will reset.

Name	Email	Organization	Rating Cycle Group	Plan Begin Date	Plan End Date	Phase	Status	Pay Plan
No data available in table								

Records Shown 25 Showing 0 to 0 of 0 entries First Previous Next Last

2. Click **Show Performance Plans**. All applicable performance plans will display.

USA Performance® Dashboard **Performance Management** Admin Reports Resources Alfonso, Amber

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year
None selected

Plan Status
None selected

Phase
None selected

Pay Plan
None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Show Performance Plans

3. Applying filters such as *Appraisal Period Year*, *Phase*, or *Pay Plan*, will produce a filtered list of users. Click **Show/Hide Additional Filter Options** to sort by *Organization*, *Rating Cycle Group*, *Current Primary Rating Official* or *Template*.

USA Performance®

DashboardPerformance ManagementAdminReportsResources

Alfonso, Amber

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year	Phase
None selected	None selected

Plan Status	Pay Plan
None selected	None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Select the additional filters you would like to apply to your available performance plans.

Organization	Rating Cycle Group
None selected	None selected

Current Primary Rating Official	Template
None selected	None selected

4. Sorting arrows appear to the right of each column heading. If not filtering by the *Create Plan* phase, click the *Phase* column's arrows to sort employees by those pending plan creations.

USA Performance® Dashboard Performance Management Admin Reports Resources Alfonso, Amber

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year
None selected

Phase
None selected

Plan Status
None selected

Pay Plan
None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Select the additional filters you would like to apply to your available performance plans.

Organization
None selected

Rating Cycle Group
None selected

Current Primary Rating Official
None selected

Template
None selected

Show Performance Plans

Name	Email	Organization	Rating Cycle Group	Plan Begin Date	Plan End Date	Phase	Status	Pay Plan
Bell, Prince	prince.bell@pm.gov	Mountain Region	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS
Brighton, Fernando N	fernando.brighton@pm.gov	Performance Management	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS
Cudd, Mariana	mariana.cudd@pm.gov	LA & SFO	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS

5. Click **Create Plan** next to the user's name.

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Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year
None selected

Phase
Create Plan

Plan Status
None selected

Pay Plan
GS

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Show Performance Plans

Name	Email	Organization	Rating Cycle Group	Plan Begin Date	Plan End Date	Phase	Status	Pay Plan
Bell, Prince	prince.bell@pm.gov	Mountain Region	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS
Brighton, Fernando N	fernando.brighton@pm.gov	Performance Management	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS
Cudd, Mariana	mariana.cudd@pm.gov	LA & SFO	Fiscal Year	N/A	N/A	Create Plan	Not Started	GS

6. Click to confirm the action.
7. The performance plan will populate.

USA Performance® Home Performance Management Admin Reports Resources

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

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

Employee Name (Last, First, Middle): Bell, Prince *Appraisal Pd. 10/1/2020 - 9/30/2021

Title: Supervisory PM Specialist Series: 0340 Pay Plan: GS Grade: 13

Organization: Mountain Region

8. If the new plan is for an executive who had a plan the previous rating cycle, the administrator will see a prompt to import the previous plan information.

Import from Previous Plan

Do you want to transfer data from the previous evaluation to this new one?
A preview of the transferred evaluation is below.
If you click "Yes", you must Save the evaluation in order keep the changes.

Yes No

9. Click **Yes** to copy the contents of *Part 1. Consultation* and agency-specific requirements for the critical elements, weight settings, performance requirements, and strategic alignment. Click **No** if system settings have been updated.
10. The performance plan will populate.

Create a Performance Plan – Special Circumstances

Users can have multiple performance plans in one or more rating cycles. The multiple plans feature works in tandem with the rating cycle groups and plan status feature to allow users to reflect details, changes in performance plans, or any other related practices that may occur during the live performance management process. To keep with best practices, a user should only have one active plan per rating cycle group at any given time.

To assign a new plan to a user, all other plans assigned to the individual should be in an *On Hold* or *Closed* status. If the **Performance Management** tab does not prompt for a new plan to be created, the new plan can be initiated from the user's profile page through *Manage Users*.

1. Click **Admin**.
2. Click **Manage Users** under *Users & Permissions*.

USA Performance® Dashboard Performance Management **Admin** Reports Resources Beach, Trinity

Admin Home

Users & Permissions

- Manage Users**
- [Assign User Officials](#)
- [Import Users](#)
- [Assign User Roles](#)
- [Assign Rating Cycle Groups](#)

System Configuration

- [Manage Organizations](#)
- [Manage Rating Cycle Groups](#)
- [Submit Performance Appraisals to eOPF](#)
- [Manage eOPF Eligibility Settings](#)

SES Configuration

- [Manage Organization SES Template Settings](#)
- [Manage PRB Groups](#)
- [Assign PRB Groups to Executives](#)

Other Performance Configuration

- [Manage Performance Element Library](#)
- [Manage Performance Standards Library](#)
- [Manage Strategic Goals](#)
- [Manage Templates](#)
- [Assign Default Template](#)

3. To locate the user, sort, filter and search table items as explained in the *Basic Functionality* guide.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home **Manage Users**

Manage Users [Create User](#)

Pay Plan: None selected |
 Series: None selected |
 Grade: None selected |
 [Filter](#)

[Search](#) [Reset](#)

☐ Display Inactive Users

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Name	Email	Organization	Parent Organization	Pay Plan-Series-Grade	Agency Identifier	Status
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Performance Management Agency	GS	N/A	Active
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Performance Management Agency	GS-0201-12	N/A	Active
Adam, Gabriella	gabriella.adam@pma.gov	Chief Financial Officer	Performance Management Agency	GS	N/A	Active
Adams, Nevaeh	nevaeh.adams@pma.gov	Human Resources	Performance Management Agency	GS	N/A	Active
Albert, Mason	mason.albert@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarado, Mallory	mallory.alvarado@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarez, Sophia	sophia.alvarez@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active

Pressing Enter will perform the search. Pressing Esc will reset.

4. Select the user from the *Name* column.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home Manage Users

Manage Users

Create User

Pay Plan: None selected Series: None selected Grade: None selected Filter

☐ Display Inactive Users

Search Reset

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Pressing Enter will perform the search. Pressing Esc will reset.

Name	Email	Organization	Parent Organization	Pay Plan-Series-Grade	Agency Identifier	Status
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Performance Management Agency	GS	N/A	Active
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Performance Management Agency	GS-0201-12	N/A	Active
Adam, Gabriella	gabriella.adam@pma.gov	Chief Financial Officer	Performance Management Agency	GS	N/A	Active
Adams, Nevaeh	nevaeh.adams@pma.gov	Human Resources	Performance Management Agency	GS	N/A	Active
Albert, Mason	mason.albert@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarado, Mallory	mallory.alvarado@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarez, Sophia	sophia.alvarez@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active

5. The **Personal Information** tab will open. Click **Performance Plans**.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home Manage Users Personal Information Performance Plans User Roles

Personal Information for Odin Abbott

Fields marked with an asterisk (*) are required.

User Data

User Avatar

Change Avatar Remove

*First Name: Odin *Last Name: Abbott Middle Name:

An SSN has been entered for this user. Only enter an SSN if you are changing the existing SSN. Leaving this field blank will leave the current SSN unchanged.

Social Security Number: Confirm Social Security Number: Supervisory Code: 8 - All Other Positions

When entering SSN, please only enter numbers without the dashes.

6. Click **Create New Plan** under *Plan Information*.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home Manage Users Personal Information Performance Plans User Roles

Performance Plan Information for Odin Abbott

Fields marked with an asterisk (*) are required.

User Data

*Pay Plan: GS Series: - Select Series - Grade: - Select Grade -

Select "ZZ" for employees who are not rated.

Title: Org Admin Position Description #:

Plan Information

Rating Cycle Group: Fiscal Year Cycle Assigned Template: EPA Demo Plan 2

Create New Plan Filter records:

7. Use the *Rating Cycle Group* and *Template* drop downs to select the rating cycle group and template. Click **Create New Evaluation**. The employee plan will populate.

Create Evaluation

Evaluation Data

*Rating Cycle Group: - Select Rating Cycle -

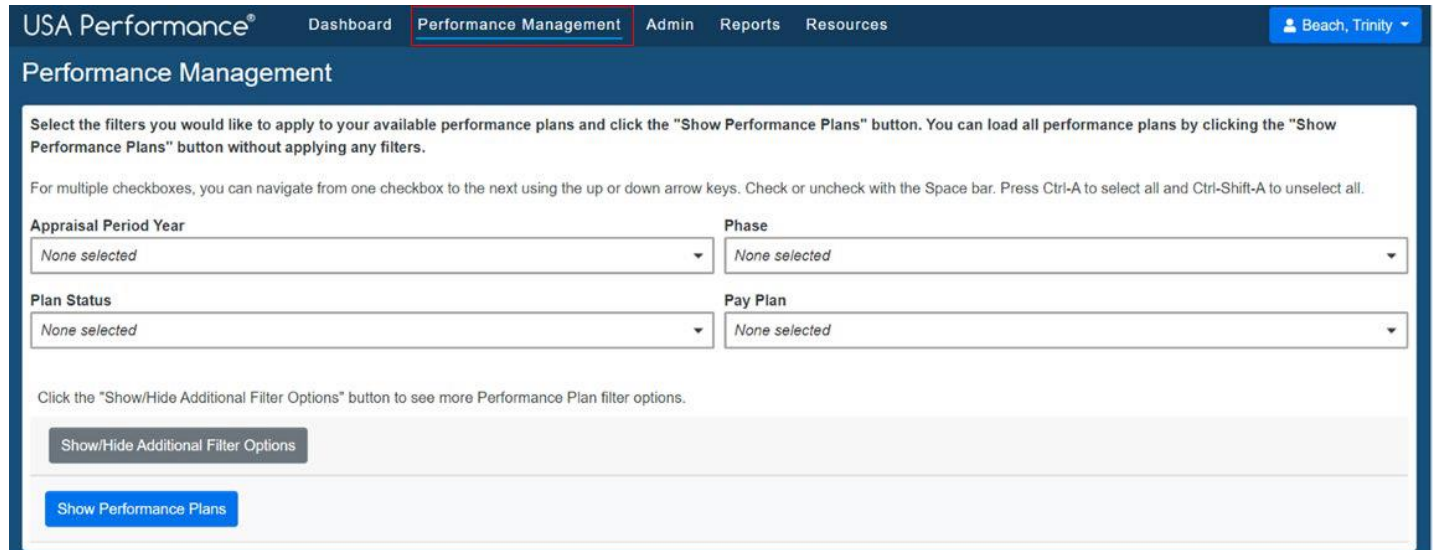
*Template: - Select Template -

Create New Evaluation Cancel

Open a Performance Plan

After a plan has been created, it may be necessary to access that plan to review the information or make changes. Administrators can open all plans regardless of the plan status.

1. Click **Performance Management**.



The screenshot shows the 'USA Performance' dashboard with the 'Performance Management' tab selected. The interface includes a header with navigation links (Dashboard, Performance Management, Admin, Reports, Resources) and a user profile (Beach, Trinity). The main section is titled 'Performance Management' and contains instructions for filtering performance plans. It features four dropdown menus: 'Appraisal Period Year', 'Phase', 'Plan Status', and 'Pay Plan', all currently set to 'None selected'. Below these filters are two buttons: 'Show/Hide Additional Filter Options' and 'Show Performance Plans'.

USA Performance® Dashboard **Performance Management** Admin Reports Resources Beach, Trinity

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year	Phase
None selected	None selected

Plan Status	Pay Plan
None selected	None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Show Performance Plans

2. Click **Show Performance Plans** and all applicable performance plans will display. Applying filters such as *Appraisal Period Year*, *Plan Status*, *Phase*, or *Pay Plan*, *Organization*, *Rating Cycle Group*, *Current Primary Rating Official* or *Template* will produce a filtered list of users.

The screenshot displays the 'USA Performance' web application interface. The top navigation bar includes 'Dashboard', 'Performance Management' (highlighted), 'Admin', 'Reports', and 'Resources'. A user profile 'Beach, Trinity' is in the top right. The main heading is 'Performance Management'. Below it, instructions state: 'Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.' A note follows: 'For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.' The filter section contains eight dropdown menus arranged in two columns. The first column includes 'Appraisal Period Year', 'Plan Status', 'Organization', and 'Current Primary Rating Official'. The second column includes 'Phase', 'Pay Plan', 'Rating Cycle Group', and 'Template'. All dropdowns currently show 'None selected'. A 'Show/Hide Additional Filter Options' button is located below the first column. At the bottom, a 'Show Performance Plans' button is highlighted with a red rectangle.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year **Phase**

None selected None selected

Plan Status **Pay Plan**

None selected None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Select the additional filters you would like to apply to your available performance plans.

Organization **Rating Cycle Group**

None selected None selected

Current Primary Rating Official **Template**

None selected None selected

Show Performance Plans

3. To locate the user, sort, filter and search table items as explained in the *Basic Functionality* guide.

4. Select the user from the *Name* column.

USA Performance®
Dashboard
Performance Management
Admin
Reports
Resources
Beach, Trinity

Performance Management

Select the filters you would like to apply to your available performance plans and click the "Show Performance Plans" button. You can load all performance plans by clicking the "Show Performance Plans" button without applying any filters.

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Appraisal Period Year
None selected

Phase
None selected

Plan Status
None selected

Pay Plan
None selected

Click the "Show/Hide Additional Filter Options" button to see more Performance Plan filter options.

Show/Hide Additional Filter Options

Select the additional filters you would like to apply to your available performance plans.

Organization
None selected

Rating Cycle Group
None selected

Current Primary Rating Official
None selected

Template
None selected

Show Performance Plans

Search
Reset

Pressing Enter will perform the search. Pressing Esc will reset.

Name	Email	Organization	Rating Cycle Group	Plan Begin Date	Plan End Date	Phase	Status	Pay Plan
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	N/A	N/A	Create Plan	Not Started	GS
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	10/1/2018	9/30/2019	Progress Review	Active	GS
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	10/1/2019	9/30/2020	Planning	Active	GS
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	10/1/2019	9/30/2020	Planning	Closed	GS
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	9/1/2020	12/31/2020	Planning	Active	GS
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Fiscal Year Cycle	10/1/2020	9/30/2021	Planning	Active	GS
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Fiscal Year Cycle	10/1/2020	9/30/2021	Planning	Active	GS
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Fiscal Year Cycle	10/1/2020	9/30/2021	Progress Review	Closed	GS
Adam, Gabriella	gabriella.adam@pma.gov	Chief Financial Officer	Calendar Year Rating Cycle	N/A	N/A	Create Plan	Not Started	GS

Update Part 1: Employee Input after Planning Signatures

User Profile Updates

When changes are made to the user profile, the administrator can automatically update the plan without removing signatures.

1. Click **Admin**.

2. Click **Manage Users** under *Users & Permissions*.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Admin Home

Users & Permissions
Manage Users
Assign User Officials
Import Users
Assign User Roles
Assign Rating Cycle Groups

System Configuration
Manage Organizations
Manage Rating Cycle Groups
Submit Performance Appraisals to eOPF
Manage eOPF Eligibility Settings

SES Configuration
Manage Organization SES Template Settings
Manage PRB Groups
Assign PRB Groups to Executives

Other Performance Configuration
Manage Performance Element Library
Manage Performance Standards Library
Manage Strategic Goals
Manage Templates
Assign Default Template

3. To locate the user, sort, filter and search table items as explained in the *Basic Functionality* guide.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home Manage Users

Manage Users Create User

Pay Plan: None selected Series: None selected Grade: None selected Filter

☐ Display Inactive Users

Search Reset

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all. Pressing Enter will perform the search. Pressing Esc will reset.

Name	Email	Organization	Parent Organization	Pay Plan-Series-Grade	Agency Identifier	Status
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Performance Management Agency	GS	N/A	Active
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Performance Management Agency	GS-0201-12	N/A	Active
Adam, Gabriella	gabriella.adam@pma.gov	Chief Financial Officer	Performance Management Agency	GS	N/A	Active
Adams, Nevaeh	nevaeh.adams@pma.gov	Human Resources	Performance Management Agency	GS	N/A	Active
Albert, Mason	mason.albert@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarado, Mallory	mallory.alvarado@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarez, Sophia	sophia.alvarez@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active

4. Select the user from the *Name* column.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity ▾

Administration: Users & Permissions

Admin Home Manage Users

Manage Users

Create User

Pay Plan: None selected Series: None selected Grade: None selected Filter

☐ Display Inactive Users

Search Reset

For multiple checkboxes, you can navigate from one checkbox to the next using the up or down arrow keys. Check or uncheck with the Space bar. Press Ctrl-A to select all and Ctrl-Shift-A to unselect all.

Pressing Enter will perform the search. Pressing Esc will reset.

Name	Email	Organization	Parent Organization	Pay Plan-Series-Grade	Agency Identifier	Status
Abbott, Odin	odin.abbott@pma.gov	Chief Information Officer	Performance Management Agency	GS	N/A	Active
Abdul-Malik, Salahudeen	salahudeen.abdul-malik@pma.gov	Human Resources	Performance Management Agency	GS-0201-12	N/A	Active
Adam, Gabriella	gabriella.adam@pma.gov	Chief Financial Officer	Performance Management Agency	GS	N/A	Active
Adams, Nevaeh	nevaeh.adams@pma.gov	Human Resources	Performance Management Agency	GS	N/A	Active
Albert, Mason	mason.albert@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarado, Mallory	mallory.alvarado@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active
Alvarez, Sophia	sophia.alvarez@pma.gov	Office of General Counsel	Performance Management Agency	GS	N/A	Active

5. The **Personal Information** tab will open. Click **Performance Plans**.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity ▾

Administration: Users & Permissions

Admin Home Manage Users Personal Information Performance Plans User Roles

Personal Information for Odin Abbott

Fields marked with an asterisk (*) are required.

User Data

User Avatar: Odin

*First Name: Odin *Last Name: Abbott Middle Name:

An SSN has been entered for this user. Only enter an SSN if you are changing the existing SSN. Leaving this field blank will leave the current SSN unchanged.

Social Security Number: Confirm Social Security Number: Supervisory Code: 8 - All Other Positions

When entering SSN, please only enter numbers without the dashes.

6. Make any necessary revisions to the user data. Click **Save**.

7. To populate the changes to a plan that is active or on hold, click **Update Plan** next to the plan.

USA Performance® Dashboard Performance Management Admin Reports Resources Beach, Trinity

Administration: Users & Permissions

Admin Home Manage Users Personal Information Performance Plans User Roles

Performance Plan Information for Odin Abbott

Fields marked with an asterisk (*) are required

User Data

*Pay Plan: GS Series: - Select Series - Grade: - Select Grade -

Select "ZZ" for employees who are not rated.

Title: Org Admin Position Description #:

Plan Information

Rating Cycle Group: Fiscal Year Cycle Assigned Template: EPA Demo Plan 2

Create New Plan Filter records:

Year	Title	Organization Name	Begin Date	End Date	Plan Status	Rating Cycle Group	Link to Plan	Action
2021	Org Admin	Chief Information Officer	10/01/2020	09/30/2021	Active	Fiscal Year Cycle	View	N/A
2020	Org Admin	Chief Information Officer	09/01/2020	12/31/2020	Active	Fiscal Year Cycle	View	N/A
2020	Org Admin	Chief Information Officer	10/01/2019	09/30/2020	Closed	Fiscal Year Cycle	View	N/A
2020	Org Admin	Chief Information Officer	10/01/2019	09/30/2020	Active	Fiscal Year Cycle	View	N/A
2019	Org Admin	Chief Information Officer	10/01/2018	09/30/2019	Active	Fiscal Year Cycle	View	Update Plan

Display records 25 Showing 1 to 5 of 5 entries First Previous 1 Next Last

Officials

Reviewing Official: Albert, Mason - mason.albert@pma.gov Secondary Reviewing Official: - Unassigned -

Rating Official: McKay, Nehemiah - nehemiah.mckay@pma.gov Secondary Rating Official: - Unassigned -

Save

8. Click to confirm this action. You will receive a confirmation message.

Plan Purpose

Administrators may update the **Plan Purpose** field on active plans.

1. Open the performance plan.
2. Use the *Plan Purpose* drop down to select the new plan purpose. Click **Save**.

The screenshot shows the 'Part 1, Employee Input' section of the USA Performance system. The employee name is 'Abbott, Odin' and the title is 'Org Admin'. The organization is 'Chief Information Officer'. The 'Plan Purpose' dropdown menu is open, showing options: Annual, Detail, Extended, Interim, Separation, Transfer, WGI, and Other. The 'Annual' option is selected. The 'Appraisal Pd.' dates are 10/1/2018 to 9/30/2019. The 'Rating Official's Signature' is 'Electronically signed by BOYLE, KING (Rating Official)' and the 'Employee's Signature' is 'Electronically signed by ABBOTT, ODIN'. The 'Date' is 11/5/2019.

Appraisal Pd.

Administrators may update the **Appraisal Pd.** dates on plans in an Active, On Hold or Under Review plan status.

1. Open the performance plan.
2. Use the *Appraisal Pd.* calendar selection to select the new dates. Click **Save**.

The screenshot shows the 'Part 1, Employee Input' section of the USA Performance system. The employee name is 'Abbott, Odin' and the title is 'Org Admin'. The organization is 'Chief Information Officer'. The 'Appraisal Pd.' calendar is open, showing the month of October 2018. The 'Rating Official's Signature' is 'Electronically signed by BOYLE, KING (Rating Official)' and the 'Employee's Signature' is 'Electronically signed by ABBOTT, ODIN'. The 'Date' is 11/5/2019.

Bypass Employee Signature

Administrators can bypass an employee signature in the planning and progress review phases by clicking **Bypass Employee Signature** and in the rating phase by clicking **Employee Refused to Sign**. Administrators can remove a bypassed signature as necessary.

1. Open the performance plan.
2. Use the plan navigation bar or navigate to the appropriate phase within the plan for which a signature bypass is necessary.

3. Click **Bypass Employee Signature** next to the corresponding employee signature box.

USA Performance® Home Performance Management Admin Reports Resources

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

No Evaluation Notes

Part 1. Employee Input *I have reviewed this plan and have been consulted on its development.* Remove Signatures Plan Status: Active

Employee Name (Last, First, Middle): Cudd, Mariana *Appraisal Pd. 1/1/2021 - 12/31/2021

Title: PM Specialist Series: 1311 Pay Plan: GS Grade: 15

Organization: LA & SFO

Reviewing Official's Name (Last, First, Middle): Aaron, Laila

Rating Official's Signature: Electronically signed by ALDER, JAMESON (Rating Official) Date: 1/10/2021

Originally signed by Jameson Alder on 1/10/2021

Employee's Signature: Bypass Employee Signature Date:

4. Use the *Signature Bypass Reason* drop down to select the appropriate reason for the bypass including: 1. Refused to sign, 2. Unable to sign, 3. Detail, 4. On leave, 5. Active Duty, or 6. Other.

5. Click to confirm the action.

USA Performance® Home Performance Management Admin Reports Resources

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

No Evaluation Notes

Part 1. Employee Input *I have reviewed this plan and have been consulted on its development.* Remove Signatures Plan Status: Active

Employee Name (Last, First, Middle): Cudd, Mariana *Appraisal Pd. 1/1/2021 - 12/31/2021

Title: PM Specialist Series: 1311 Pay Plan: GS Grade: 15

Organization: LA & SFO

Reviewing Official's Name (Last, First, Middle): Aaron, Laila

Rating Official's Signature: Electronically signed by ALDER, JAMESON (Rating Official) Date: 1/10/2021

Originally signed by Jameson Alder on 1/10/2021

Employee's Signature: Bypass Employee Signature Date:

You have chosen to bypass the employee signature. Please ensure that you utilize Part 10. Agency Use to explain the refusal/inability to sign and identify the name and title of the user performing the signature bypass. Select the reason from the drop-down and select Bypass Employee Signature to confirm.

*Signature Bypass Reason: Unable to sign

Yes, Bypass Employee Signature No, Cancel

6. The administrator's name and bypass reason will be documented.

7. To then allow the employee to sign in place of the bypass, click **Undo Bypass of Employee Signature** to remove the administrator's name.

USA Performance® Home Performance Management Admin Reports Resources Alfonso, Amber

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

Part 1: Employee Input *I have reviewed this plan and have been consulted on its development.* Remove Signatures Plan Status: Active

Employee Name (Last, First, Middle): Cudd, Mariana *Appraisal Pd. 1/1/2021 - 12/31/2021

Title: PM Specialist Series: 1311 Pay Plan: GS Grade: 15

Organization: LA & SFO

Reviewing Official's Name (Last, First, Middle): Aaron, Laila

Rating Official's Signature: Electronically signed by ALDER, JAMESON (Rating Official) Date: 1/10/2021

Originally signed by Jameson Alder on 1/10/2021

Employee's Signature: Unable to sign/see Part 10: Amber Alfonso Undo Bypass Employee Signature Date: 1/10/2021

Originally bypassed by Amber Alfonso on 1/10/2021. Reason: Unable to sign

Reason Employee Signature Bypassed: Unable to sign

Remove Signatures in Plan

Administrators may remove signatures in the Planning and Rating phases of non-SES plans or any phase of SES plans. Plans must be in an Active status. Administrators may remove signatures from a specific phase depending on if plan changes are needed or specific signatures corrected.

Signature removal does not need to be sequential unless a plan is in a Completed status. If a plan is in a Completed status, Rating phase signatures must be removed first.

When an administrator removes a signature in a phase, all signatures are removed for that specific phase. All parties will need to re-sign the plan for the phase in which signatures are removed.

Remove Signatures for Planning

1. Open the performance plan.
2. Navigate to *Part 1: Employee Input* to remove signatures for non-SES plans. Navigate to *Part 1: Consultation* for SES plans. Rating phase signatures must be removed first if a plan is in a Completed status.
3. Click **Remove Signatures**.

Non-SES

USA Performance® Home Performance Management Admin Reports Resources

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

Part 1. Employee Input *I have reviewed this plan and have been consulted on its development.* Remove Signatures Plan Status: Active

Employee Name (Last, First, Middle): Brighton, Fernando N *Appraisal Pd. 10/1/2020 - 9/30/2021

Title: Supervisory PM Specialist Series: 1311 Pay Plan: GS Grade: 15

Organization: Performance Management

SES

USA Performance® Home Performance Management Admin Reports Resources

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 1. Consultation. *I have reviewed this plan and have been consulted on its development.* Plan Status: Active Remove Signatures

Executive's Name (Last, First, Middle): Balsam, Ricky Appraisal Pd. 7/10/2020 - 7/9/2021

Executive's Signature: Electronically signed by BALSAM, RICKY Date: 12/7/2020

4. You will be asked to confirm your action. Click to confirm the action.

Remove Signatures for Progress Review

Administrators may only remove signatures for active SES plans in the Progress Review phase.

1. Open the performance plan.
2. Navigate to *Part 2: Progress Review* for SES plans. Rating phase signatures must be removed first if a plan is in a Completed status.
3. Click **Remove Signatures**.

SES

USA Performance® Dashboard Performance Management Admin Reports Resources

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Signature History Save Print Profile

Part 2. Progress Review Progress Review Notes Remove Signatures

Executive's Signature: Electronically signed by BARGELT, LINDSEY Date: 10/19/2020

Rating Official's Signature: Electronically signed by COCCIADIFERRO, ASHLEY C. (Rating Official) Date: 10/19/2020

Reviewing Official's Signature (Optional): Date:

☐ Request Reviewing Official Signature

4. You will be asked to confirm your action. Click to confirm the action.

Remove Signatures for Rating Phase

To remove signatures at the Rating phase the plan must be in Active or Completed status.

1. Open the performance plan.
2. Navigate to *Part 5: Rating Signatures* to remove signatures for non-SES plans. Navigate to *Part 3: Summary Rating* for SES plans.
3. Click **Remove Signatures**.

Non-SES

USA Performance® Home Performance Management Admin Reports Resources

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

Part 5: Rating Signatures

Reviewing Official's Signature: (Required) Date:

Rating Official's Signature: Electronically signed by ALDER, JAMESON (Rating Official) Date: 1/11/2021

Employee's Signature: Date:

Remove Signatures

SES

USA Performance® Home Performance Management Admin Reports Resources

1. Consultation 2. Progress Review **3. Rating** 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 3: Summary Rating

Initial Summary Rating

☒ Level 5 Outstanding ☐ Level 4 Exceeds Fully Successful ☐ Level 3 Fully Successful ☐ Level 2 Minimally Satisfactory ☐ Level 1 Unsatisfactory

Rating Official's Name (Last, First Middle): Albright, Horace Marden

Rating Official's Signature: Electronically signed by ALBRIGHT, HORACE MARDEN (Rating Official) Date: 12/4/2020

Executive's Signature: Electronically signed by BARR, NEVADA CALIFORNIA Date: 12/4/2020

Remove Signatures

4. You will be asked to confirm your action. Click to confirm the action.

Manage Notes in a Performance Plan

Throughout the rating cycle it may be necessary to add administrative notes or feedback from other sources to a user's plan, retract notes that have been released or delete notes.

To Create Notes

1. Open the performance plan.
2. Click **Notes** on the plan navigation bar.

3. *Notes for [employee name]* will open allowing you to copy/paste or type directly in the text box.



4. To release this note, check **Release this performance plan note** and click **Save**. Click to confirm the action.



5. To keep the note private, leave the **Release this performance plan note** box unchecked and click **Save**.
6. Your name, the date, time of the note and the note status showing if it is released will be documented.

Retract or Delete Notes from a Plan

1. Open the performance plan.
2. Click **Notes** to view evaluation notes.

3. An administrator can view all evaluation notes. To delete a note, click **Delete** corresponding with the note to be deleted.
4. To retract a released note, click **Retract**. The retracted note can be released again later as needed. Retracting makes the note viewable only to the administrator.

Notes for Wynn, Paige

Beach, Trinity - (4/25/2022 11:52:08 AM) Released - 4/25/2022 11:52:08 AM

RetractDelete

This employee has indicated that her military orders were cancelled and she will remain on duty.

☐ Release this performance plan note

SaveClose

Advance a Plan to the Rating Phase

Performance plans automatically advance to the rating phase after the final signature in the progress review. However, administrators may bypass the progress review(s).

1. Open the performance plan.

2. Use the plan navigation bar or navigate to *Part 2: Progress Review*.
3. For non-SES click **Bypass Progress Reviews**, or for SES click **Advance Plan to Rating**.

Non-SES

USA Performance® Home Performance Management Admin Reports Resources

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

Part 2: Progress Review

Bypass Progress Reviews Progress Review Notes

SES

USA Performance® Home Performance Management Admin Reports Resources

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 2: Progress Review

Executive's Signature: [Signature Field] Date: [Date Field]

Rating Official's Signature: [Signature Field] Date: [Date Field]

Reviewing Official's Signature (Mandatory): [Signature Field] Date: [Date Field]

Progress Review Notes

Advance Plan to Rating

4. You will be asked to confirm your action. Click to confirm the action.
5. Your action will be documented.

Part 2: Progress Review

Plan advanced to the Rating Phase by Alfonso, Amber on 1/10/2021 11:52:25 PM.

Return To Progress Reviews Progress Review Notes

To reverse the Advance to Rating and return to Progress Review:

1. Click **Return To Progress Reviews** to reverse the bypass and return the plan to the progress review phase.

USA Performance® Home Performance Management Admin Reports Resources

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

Part 1. Employee Input I have reviewed this plan and have been consulted on its development. Remove Signatures Plan Status: Active

Employee Name (Last, First, Middle): Bell, Prince *Appraisal Pd. 10/1/2020 - 9/30/2021

Title: Supervisory PM Specialist Series: 0340 Pay Plan: GS Grade: 13

Organization: Mountain Region

Reviewing Official's Name (Last, First, Middle): Aaron, Laila

Rating Official's Signature: Electronically signed by ALDER, JAMESON (Rating Official) Date: 1/10/2021

Originally signed by Jameson Alder on 1/10/2021

Employee's Signature: Unable to sign/see Part 10: Jameson Alder Date: 1/10/2021

Originally bypassed by Jameson Alder on 1/10/2021. Reason: Unable to sign

Reason Employee Signature Bypassed: Unable to sign

Part 2: Progress Review

Plan advanced to the Rating Phase by Alfonso, Amber on 1/10/2021 11:52:25 PM.

Return To Progress Reviews Progress Review Notes

2. You will be asked to confirm your action. Click to confirm the action.
3. The progress review(s) will now be available.

Executive Accomplishment Narratives

Executive accomplishment narratives are optional. Administrators have the option to edit and forward accomplishment narratives to the rating official. Administrators can also recall the narratives to prevent rating officials from viewing them as necessary.

1. Open the performance plan.
2. Click **Narratives** on the navigation bar or navigate to *Part 7. Executive Accomplishment Narrative*.

USA Performance® Home Performance Management Admin Reports Resources Love, David John

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 7. Executive's Accomplishment Narrative (Recommended)

B I U [List Icons] Size A- A+

☐ Send to Rating Official

3. If necessary, make edits to the narrative and click **Save** on the plan navigation bar.
4. Although not required, select **Send to Rating official** to forward the executive narrative.
5. Click to confirm the action.

USA Performance® Home Performance Management Admin Reports Resources Love, David John

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Part 7. Executive's Accomplishment Narrative (Recommended)

B I U [List Icons] Size A- A+

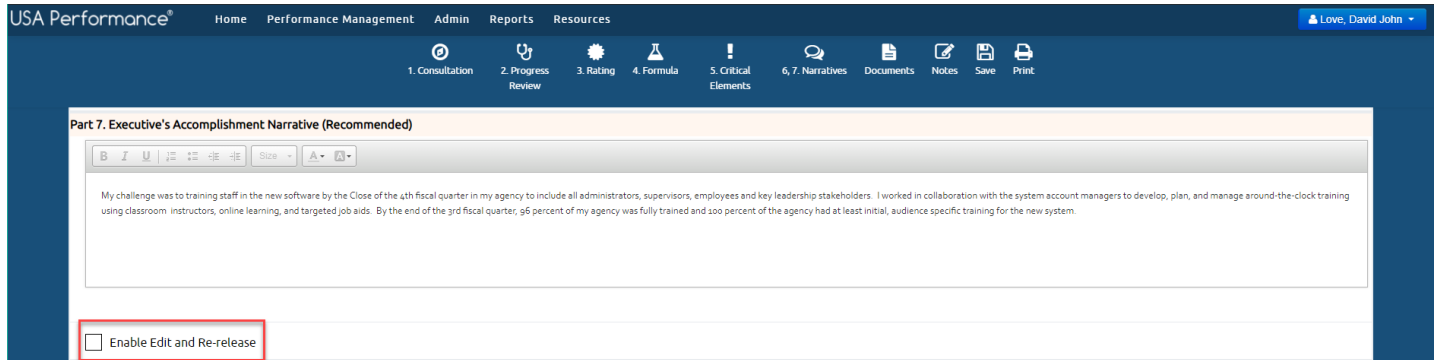
My challenge was to training staff in the new software by the Close of the 4th fiscal quarter in my agency to include all administrators, supervisors, employees and key leadership stakeholders. I worked in collaboration with the system account managers to develop, plan, and manage around-the-clock training using classroom instructors, online learning, and targeted job aids. By the end of the 3rd fiscal quarter, 96 percent of my agency was fully trained and 100 percent of the agency had at least initial, audience specific training for the new system.

Are you sure you want to notify your Rating Official that your Narrative is complete?
Notification will be sent upon saving the Evaluation.

Yes No

☒ Send to Rating Official

6. You will receive a confirmation message and the **Enable Edit and Re-release** checkbox under Part 7 will appear.



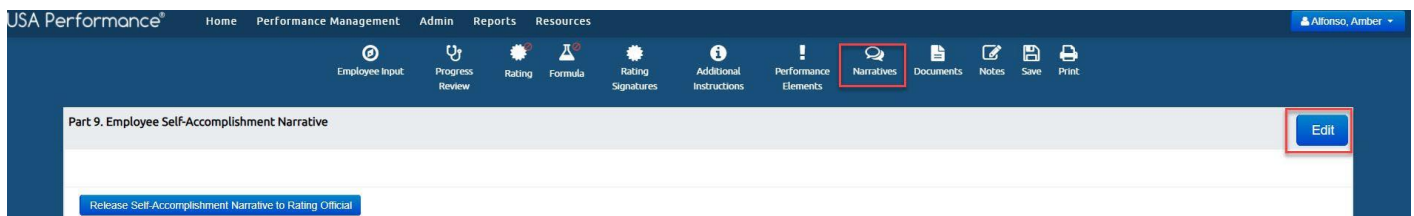
7. Check **Enable Edit and Re-release** to recall the narratives for editing and re-release as applicable. Click to confirm the action.

Non-SES Accomplishment Narratives

Non-SES employee self-accomplishment narratives, element narratives and summary narratives may be required, optional, or not available depending on agency-specific guidelines. Administrators can review and edit element level narratives for employees and supervisors when they are required, and release employee self-accomplishment narratives (SAN) to rating officials as necessary.

Employee Self-Accomplishment Narrative

1. Open the performance plan.
2. Click **Narratives** on the plan navigation bar or navigate to *Part 9. Employee Self-Accomplishment Narrative*.
3. Click **Edit** in *Part 9: Employee Self Accomplishment Narrative*.



4. If necessary, make edits to the narrative and click **Done**.
5. Click **Release Self-Accomplishment Narrative** to forward the employee SAN to the rating official for review.
6. Click to confirm your action. The self-accomplishment narrative release date will be documented.

USA Performance® Home Performance Management Admin Reports Resources

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

Part 8. Summary Rating Narrative

Part 9. Employee Self-Accomplishment Narrative Edit

Administrator Amber Alfonso is including the SAN on behalf of Mariana Cudd.

"I have performed at the Outstanding level in all critical elements. I achieved 3 of the 4 standards associated with the outstanding level for communication and my primary objectives as shown in my accomplishment survey scores, feedback from customers and supervisors, as well as my team members.

Release Self-Accomplishment Narrative to Rating Official

7. To retrieve the employee self-accomplishment narrative for changes **Unrelease Self-Accomplishment Narrative from Rating Official**. The SAN can be re-released to the rating official using the same process as above.

Part 9. Employee Self-Accomplishment Narrative

Test text

Unrelease Self-Accomplishment Narrative from Rating Official

Released to Rating Official on 1/14/2021

Reviewed: 1/14/2021

8. The date that the narrative was released to the Rating Official; as well as the verification date once the employee self-accomplishment narrative is reviewed by the rating official will be documented.

Element Level Narratives

Element level narratives will only be available for administrator editing/review when element level narratives are mandatory.

1. Open the performance plan.
2. Click **Performance Elements** on the plan navigation bar or navigate to *Part 7. Performance Elements*.

3. To edit element narratives click **Edit** next to the corresponding supervisor or employee element narrative boxes.

USA Performance® Home Performance Management Admin Reports Resources Alfonso, Amber

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

Part 7. Performance Elements

Communication ☒ Critical

Strategic Alignment:

Actively listens and attends to nonverbal cues when responding to the questions, ideas, and concerns of others. Communicates in an influential or persuasive manner, as appropriate. Writes in a clear and concise manner. Orally communicates in a clear and concise manner. Tailors communication (e.g., language, tone, level of specificity) to the audiences' level of understanding and to the communication medium.

Fully Successful:

Solicits others' input, viewpoints, or questions; addresses diverse viewpoints and provides clear and organized responses to complex issues, following up to ensure understanding. Shows respect for and carefully considers others' ideas, comments, and questions. Communicates in an influential or persuasive manner, as appropriate. Independently prepares and delivers timely, clear, and concise communications on complex topics. Independently and effectively selects what information to include in communications to best meet the audience's needs. Writes communications that typically require minimal revisions.

Written Communication

Strategic Alignment:

Written Communication

Employee Element Self-Accomplishment Narrative: **Edit**

4. Provide an element narrative in the *Employee Element Self-Accomplishment Narrative* text box or the *Rating Official Element Narrative* text box and click **Done**.

USA Performance® Home Performance Management Admin Reports Resources Alfonso, Amber

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

Employee Element Accomplishment Narrative

Strategic Alignment:

Actively listens and attends to nonverbal cues when responding to the questions, ideas, and concerns of others. Communicates in an influential or persuasive manner, as appropriate. Writes in a clear and concise manner. Orally communicates in a clear and concise manner. Tailors communication (e.g., language, tone, level of specificity) to the audiences' level of understanding and to the communication medium.

Fully Successful:

Solicits others' input, viewpoints, or questions; addresses diverse viewpoints and provides clear and organized responses to complex issues, following up to ensure understanding. Shows respect for and carefully considers others' ideas, comments, and questions. Communicates in an influential or persuasive manner, as appropriate. Independently prepares and delivers timely, clear, and concise communications on complex topics. Independently and effectively selects what information to include in communications to best meet the audience's needs. Writes communications that typically require minimal revisions.

Written Communication

Strategic Alignment:

Written Communication

Employee Element Self-Accomplishment Narrative:

Use the copy/paste functionality or simply type directly in the element level narrative box.

Press Alt + 0 to access the rich text accessibility help menu

After clicking **Done**, please click the **Save** button at the top of the page. Clicking **Done** does not save your entry.

Cancel Done **Edit**

5. The element narrative will appear under the applicable *Element Narrative* text box.

USA Performance® Home Performance Management Admin Reports Resources Alfonso, Amber

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

Communication ☒ Critical

Strategic Alignment:

Actively listens and attends to nonverbal cues when responding to the questions, ideas, and concerns of others. Communicates in an influential or persuasive manner, as appropriate. Writes in a clear and concise manner. Orally communicates in a clear and concise manner. Tailors communication (e.g., language, tone, level of specificity) to the audiences' level of understanding and to the communication medium.

Fully Successful:

Solicits others' input, viewpoints, or questions; addresses diverse viewpoints and provides clear and organized responses to complex issues, following up to ensure understanding. Shows respect for and carefully considers others' ideas, comments, and questions. Communicates in an influential or persuasive manner, as appropriate. Independently prepares and delivers timely, clear, and concise communications on complex topics. Independently and effectively selects what information to include in communications to best meet the audience's needs. Writes communications that typically require minimal revisions.

Written Communication

Strategic Alignment:

Written Communication

Employee Element Self-Accomplishment Narrative:
Use the copy/paste functionality or simply type directly in the element level narrative box.

Edit

Release a Plan with no Employee Self-Accomplishment Narrative

If an employee is unable or unwilling to write a self-accomplishment narrative (when required by the agency), the administrator will need to bypass the employee self-accomplishment narrative.

1. Open the performance plan.
2. To bypass the employee self-accomplishment narrative, click **Narratives** or navigate to *Part 9. Employee Self-Accomplishment Narrative*. Click **Bypass Narrative**.

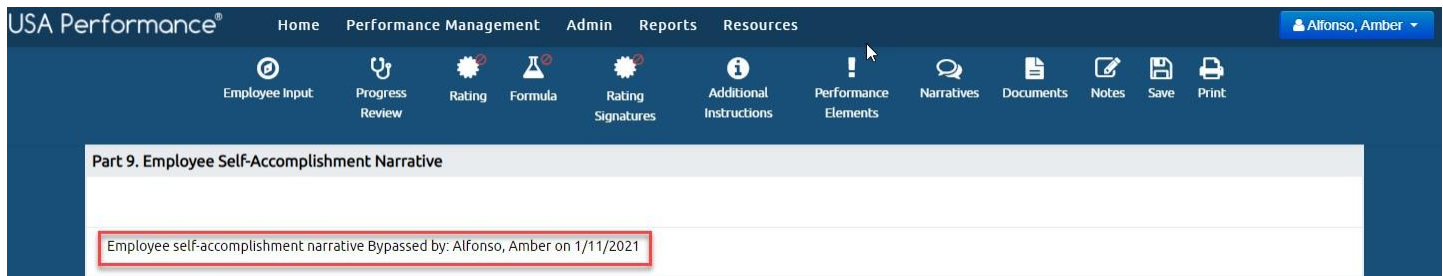
USA Performance® Home Performance Management Admin Reports Resources Alfonso, Amber

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

Part 9. Employee Self-Accomplishment Narrative Edit

Release Self-Accomplishment Narrative to Rating Official Bypass Narrative

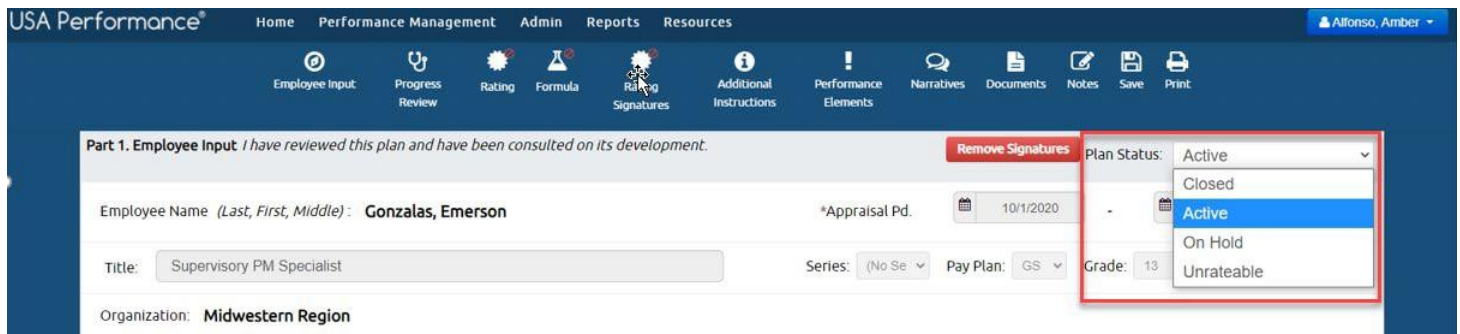
3. Click to confirm the action.
4. The administrator and bypass date will be documented. This plan may now move forward in the process.



Update Plan Status

Performance plans can be moved to a different status as necessary when an employee leaves the agency, begins or ends a detail, is away from the agency for a period or a plan is created erroneously. In addition, administrators can mark performance plans with an *Unrateable* status option for non-SES which will allow transmission to eOPF, without being in a complete status.

1. Open the performance plan.
2. Select *Closed*, *Active*, *On Hold*, or *Unrateable* from the *Plan Status* drop down.



3. Click to confirm your action. You will receive a confirmation message.