Frequently Asked Questions for Rating Officials

Login Requirements

Please visit the USA Performance Login page, https://usaperformance.opm.gov, and click **Login FAQ** for detailed login information.

System Navigation

Can I have the system running in multiple browser tabs?

- No, actions in the system may not save properly with multiple browser tabs open.

Notifications

Are users notified via email when they have a task to complete in the system?

- Yes. Rating officials, reviewing officials, executives, and employees will receive email notifications for the following actions:

User role	Notification received
Rating Official	• Create plan when cycle is released • Sign plan after reviewing official signs Part 1 • Review Self-Accomplishment Narrative when released by employee
Reviewing Official	• Review plan if released by rating official • Sign for progress review, *if required for Part 2*, after rating official signs • Sign for Part 5 when signed by the rating official, *if required to sign* • *Review the Initial Summary Rating after the rating official signs Part 3 (SES ONLY)*
Executive	• Sign plan after rating official signs Part 1 • Sign progress review after rating official signs Part 2 • Sign rating after the rating official or reviewing official signs Part 3 • View plan after it is signed by Appointing Authority
Employee	• Sign plan when rating official signs Part 1 • Sign progress review after rating official signs Part 2 • Sign Part 5 once rating official releases rating

Proxy Users

How do I add and manage Proxy Users?

- In USA Performance, click the username dropdown and select **Manage Proxies**. Enter the desired proxy in the Search Criteria and click **Search by Name** or **Search by Email** accordingly to populate the Available Users section. Under the Available Users section, click **Add as Proxy** for the individual that you would like to assign as the proxy user. Then click **Save Proxy Changes.** The name will appear under the Current Proxies section, and that individual can execute the functions of the Proxy User.

I tried to open another tab to work as a Proxy User, but I received a security error message. What's going on?

- Do not open a separate browser tab to work as a proxy. Your actions in the system may not save properly with multiple browser tabs open.

Performance Plan Edits

Will changes to a plan still be saved if I receive a warning that there is missing information?

- To save changes to a performance plan, click **Save** on the plan navigation bar and check the top banner to ensure that all fields are complete. A validation error with required information, but the information is still saved. The employee will not be able to sign the plan until all required fields are complete.

Does the system maintain a record of changes to the performance plan?

- Currently, the system does not allow users to view an audit trail for changes to the performance plan. You and your employee must agree to the changes by re-signing the performance plan. The original signatures and dates will be saved and reflected on Part 1 of the plan regardless of signature removals and changes to the plan. **Signature events are saved in Signature History.**

Can I make modifications once plans are in the Monitoring Phase?

- Yes, it is possible to continue to make modifications in the monitoring phase. For non-SES plans, you can make these changes. Changes to non-SES plans in the monitoring phase require signatures to be removed from the Planning Phase. Once signatures are removed, changes can be made, and the plan can be re-signed.

What if an employee wants to change the content to their accomplishment narrative after submitting it to a rating official?

- Once an employee has submitted content for the self-accomplishment narrative, changes cannot be made to that narrative. However, they can recall the self-accomplishment narrative if the plan is not signed by the rating official. The Rating Official will be alerted that a change has been made when the self-accomplishment narrative is re-submitted to re-certify the self-accomplishment narrative.

Signing Performance Plans

Why are the prompts to sign my performance plan sometimes not available?

- Signatures become available when the plan meets all requirements. Signatures follow an order: rating official, reviewing official (if required), and then employee.

Plans must be unsigned to make edits. For example, a Rating Official may not see an option to sign for a Progress Review if signatures are missing in Part 1.

Can my employee and I sign the performance plan at the same time or does one have to sign before the other?

- You must sign before your employee can sign. Based on agency-specific system configuration, the reviewing official may be required to sign. In this case, you, the rating official, sign before the reviewing official and the employee must sign last.

Notes

Who can see the Notes in the Progress Review section?

- The rating officials, administrators, and their proxies can view all Progress Review notes. The reviewing officials, employees, and their proxies can only see the notes that are released by the rating official. Be mindful that notes are part of the plan record.

What is the difference between the Notes on the Navigation Bar and the Notes in the Progress Review section? Why have two note areas?

- There are two different ways to add notes in USA Performance. The first option, found in the Navigation Bar at the top of the page, permits any user with access to the plan to review or add notes. The purpose of this notes section is to add any notes for the plan in general and at any point in the performance period. The second option, found in the Progress Review Section, is only available for the rating official to add notes. The rating official can release the notes to the employee to view. The purpose of this notes section is to add any feedback notes on the plan. These notes can remain private to the rating official during the performance period if required.

Text Boxes

Why do I sometimes not have the option to paste copied content when I right click to copy and paste into text boxes?

- The copy and paste functionality is specific to the browser (e.g. Internet Explorer, Chrome). The context menu may change depending on where in the text box you click and if the text box already has text. Using the key commands to copy (Ctrl+c) and paste (Ctrl+v)work to enter content into the text boxes.

What should I do if an additional character(s) is added to the text when I copy and paste from another document?

- Sometimes when you copy/cut and paste text from one document to another or from one system to another, the hidden formatting becomes viewable in the newly pasted text (e.g. "<?htp>"). If errors are encountered while copying,

cutting, or pasting text from MS Office documents into the system's performance plan areas, copy first to Notepad and then copy and paste again into your performance plan in the system.

Documents

Does a performance plan need to be signed before you can upload a document?

- Documents can be uploaded to a performance plan at any time during the performance cycle. Open your performance plan (or the employee plan) and click **Documents**, which will take you to the Documents section at the bottom of the performance plan. Click **Add Document** and follow the directions to upload.

I am trying to upload a document to a performance plan and it is not working. What is the problem?

- It is likely that the file is too large, and the server is timing out the request. Check the file size and the document type meets system requirements. USA Performance only allows PDF, Word, Excel, PowerPoint, JPG, PNG, and GIF files that are no larger than 4 MG.

How do I view documents?

- Documents can be accessed by clicking **Documents** or scrolling to the bottom of the performance plan.

Printing Performance Plans

How do I print a performance plan?

- Opening a PDF under Google Chrome and Internet Explorer are slightly different.

  - For Chrome: Click **Print** at the top of the plan page. A PDF icon will populate at the bottom left of the screen. Click on the icon to open the PDF. On the PDF, hover the mouse at the top of the screen and click the printer icon.

  - For Internet Explorer (IE): Click **Print** at the top of the plan page. IE will ask if you want to open or save the document. Click **Open**. Then click **File** at the right top of the screen. Click **Print**.

When I print a performance plan in USA Performance, the font in the PDF version of the plan displays very tiny. What's wrong?

- This generally occurs when a user cuts/pastes from an excel spreadsheet or a Word document formatted with columns and spaces into the Summary Rating or Accomplishment Narrative. If users are going to copy/paste their narratives, remind them to do so from one single Word document that does not include columns or large spacing. To fix the issue, delete the extra spaces in the Narrative text boxes or cut/paste the verbiage from the narratives into a Word document, and upload each as a separate document to the plan.

I tried to print a performance plan, but the final rating is not appearing on the printout of the plan. What's happening?

- The final rating and rating feedback will not be included on the printout of the performance plan until the plan is signed by the rating official, the reviewing official (if required), and released to the employee for signature. Once the plan has been released to the employee, the final rating and rating feedback will be visible on the plan printout.

Retention of Performance Plans

How many years does the system maintain the performance plans?

- In accordance with 5 CFR 430.311(c), USA Performance will maintain performance plans for five years.

Resources

I want to learn more about how to use USA Performance. Where can I go to get more information on how to use the system?

- Users can access the quick guides in USA Performance on the Resources page. The quick guides walk users through specific actions step by step. Full training materials are also available for employees, rating officials and Senior Executive Service users.