



Planning Phase for Rating Officials

Performance Plan Review and Signature Process

Employees, Administrators, and Rating Officials can create new employee performance plans. For specific instructions to create a plan, please refer to the *Performance Plan Development* guide.

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Review the Plan

1. From the **Dashboard** page, click **Sign (FY) Plans as Rating Official**.

The screenshot shows the USA Performance Dashboard for user Adalyn Malone. The top navigation bar includes links for Home, Performance Management, Reports, and Resources. The user's name and a dropdown arrow are in the top right. Below the navigation bar, a welcome message "Welcome, Adalyn Malone" is displayed next to a profile picture. The main content area is divided into three sections: "Tasks Requiring My Attention", "My Employees' Plans", and "Quick Links". The "My Employees' Plans" section is highlighted with a red box around the "Sign 2020 Plans as Rating Official" link, which has a blue notification badge with the number 1. Other links in this section include "Rate and Sign 2020 Plans", "Sign 2021 Plans as Rating Official", "Create 2021 Plans", "Rate and Sign 2021 Plans", "Create 2022 Plans", and "Release 2022 Ratings to Employees". The "Quick Links" section contains links for "Performance Plan", "View My 2020 Plan (Active)", "View My 2021 Plan (On Hold)", "View My Employees' Active Plans", and "Help".

2. The **Performance Management** page will open filtered to show active employee plans.
3. Click the appropriate employee's name to navigate to the plan.

The screenshot shows the USA Performance Performance Management page. The top navigation bar includes links for Home, Performance Management, Reports, and Resources. The user's name and a dropdown arrow are in the top right. Below the navigation bar, the page title "Performance Management" is displayed. A message states: "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." Below this message, there are four filter dropdowns: "Appraisal Period Year", "Plan Status", "Phase", and "Pay Plan". Each dropdown currently shows "None selected". Below the filters, there is a button labeled "Show/Hide Additional Filter Options" and a blue button labeled "Show Performance Plans". At the bottom of the page, there is a search bar with the text "wynn" and buttons for "Search" and "Reset". Below the search bar, a table lists performance plans. The first row is highlighted with a red box around the "Wynn_Paige" name.

Name	Email	Organization	Rating Cycle Group	Plan Begin Date	Plan End Date	Phase	Status	Pay Plan
Wynn_Paige	paige.wynn@pma.gov	Chief Financial Officer	Fiscal Year Cycle	10/1/2020	9/30/2021	Planning	Active	GS

4. The plan will open.
5. Review the plan including **Part 1. Employee Input** and **Part 7. Performance Elements**.

The screenshot shows the 'USA Performance' interface. The top navigation bar includes 'Home', 'Performance Management', 'Reports', and 'Resources'. The 'Performance Management' section is active, with sub-links for 'Employee Input', 'Additional Instructions', 'Performance Elements', 'Narratives', 'Documents', 'Notes', 'Signature History', 'Save', 'Print', and 'Profile'. The 'Employee Input' link is highlighted with a red box. Below the navigation bar, the 'Part 1. Employee Input' section is displayed. It includes a status bar with 'Eligible for eOPF' checked and 'Plan Status: Active'. The employee information is as follows: Employee Name (Last, First, Middle): Wynn, Paige; Title: Human Resources Specialist; Organization: Chief Financial Officer; Supervisory Code: 2 - Supervisor or Manager; *Plan Purpose: Annual; PD Number: (empty). The *Appraisal Pd. is set from 10/1/2020 to 9/30/2021. The Series is 0299, Pay Plan is GS, and Grade is 15.

The screenshot shows the 'USA Performance' interface. The top navigation bar is the same as the previous screenshot. The 'Performance Elements' link is highlighted with a red box. Below the navigation bar, the 'Part 6. Instructions' section is displayed, stating: 'All employees must be given an annual performance appraisal rating, which will help determine their eligibility for within grade increases (WIGI), promotions, awards, and training. The process begins with the communication of the performance plan. Ensure that the employee reads and understands the competencies in his/her plan, and signs for consultation.' Below this, the 'Part 7. Performance Elements' section is displayed. It includes a 'Critical' checkbox. The 'Oral Communication' section is highlighted. It includes the following text: 'Strategic Alignment: Strategic Goal 3: Improve integration and communication of HR services to Federal agencies to meet emerging needs'. 'Expresses information (for example, ideas or facts) to individuals or groups effectively, taking into account the audience and nature of the information (for example, technical, sensitive, controversial); makes clear and convincing oral presentations; listens to others, attends to non-verbal cues, and responds appropriately.' 'Fully Successful: Meets competency definition and clearly communicates basic ideas and information. Thoughts and responses to basic questions are generally well organized and successfully impart pertinent and correct information.' 'Exceeds Fully Successful: Meets competency definition and communicates moderately complex information to diverse audiences (e.g., agency managers, supervisors, HR personnel) through course instruction on HR subjects, briefings to external agency personnel on the breadth and availability of products and services, and/or technical advice to internal and external customers. Communication usually results in meeting customer needs as indicated through feedback such as customer survey results, unsolicited comments, or significant positive changes in furthering the customer agency's mission/goals or meeting its stated needs. Demonstrates growth in position by accepting and successfully accomplishing new assignments requiring greater skill (e.g., technical advice and briefings to customers).'

Review Documents

1. To view or attach any supporting documents, click **Documents** on the navigation bar or scroll to **Employee Documents**. Additional documents are not required.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Documents - Wynn, Paige

Employee Documents Add Document Search:

File Name ^	Type ^	Description ^	Comments ^	Updated By ^	Last Updated ^	Action
IDP.docx	Individual Development Plan	IDP		Stark, Eleanor	7/26/2021 3:29:30 PM	Delete

Records displayed 25

Showing 1 to 1 of 1 entries

Review Notes

1. Click **Notes** on the navigation bar.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

2. The **Notes** box will open and any previously provided notes will be available.

Notes for Wynn, Paige

☐ Release this performance plan note

Save Close

Signature Process in the Planning Phase

Navigate between employee performance plans to review and sign plans by selecting the next employee to view and clicking **View Selected Plan**. You may also click **View Next Plan** or **View Previous Plan**.

The screenshot shows the top navigation bar of the USA Performance system. The user is logged in as Malone, Adalyn. The main navigation menu includes Home, Performance Management, Reports, and Resources. Below this, there is a secondary bar with links to << View Previous Plan, Sign 2021 Plans as Rating Official (2), and View Next Plan >>. A dropdown menu for 'Select Next Plan:' is set to 'Adams, Nevaeh's 2021 Plan', with a 'View Selected Plan' button next to it. Below this bar is a row of icons for various functions: Employee Input, Progress Review, Additional Instructions, Performance Elements, Narratives, Documents, Notes, Signature History, Save, Print, and Profile.

Agency policies indicate whether a Reviewing Official signature is required, optional, or not available. If the Reviewing Official signature is not necessary, only the Rating Official needs to sign prior to the employee signing. Refer to agency policy for further guidance.

After all supervisor signatures are applied, employees will sign the plan last.

Rating Official Process for Required or Optional Reviewing Official Signature

If the Reviewing Official signature is required or optional, release the plan to the Reviewing Official for review and signature.

1. Click **Release to Reviewing Official** in **Part 1. Employee Input**.

The screenshot shows the 'Part 1. Employee Input' form in the USA Performance system. The form 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 are as follows: Employee Name (Last, First, Middle): Wynn, Paige; *Appraisal Pd. (10/1/2021 - 9/30/2022); Title: Supervisory Intel Analyst; Series: 0301; Pay Plan: GS; Grade: 15; Organization: Chief Financial Officer; Supervisory Code: 2 - Supervisor or Manager; *Plan Purpose: Annual; PD Number: (empty); Reviewing Official's Name (Last, First, Middle): Lambert, Lacey; Rating Official's Name (Last, First, Middle): Malone, Adalyn. A 'Release to Reviewing Official' button is highlighted with a red box.

2. The Reviewing Official will receive a notification to review and sign the plan. If you released the plan by mistake, click **Recall from Reviewing Official**.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Success! This plan has been released. The Reviewing Official will receive an email alerting them that it's time to review and sign this plan.

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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Name (Last, First, Middle): Malone, Adalyn

Recall from Reviewing Official

3. Once the Reviewing Official signs, the plan is open for your signature. Click **Sign** in **Part 1. Employee Input**.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input 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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Signature: Electronically signed by LAMBERT, LACEY (Reviewing Official) Date: 7/26/2021

Originally signed by Lacey Lambert on 7/26/2021

Rating Official's Name (Last, First, Middle): Malone, Adalyn

Rating Official's Signature: Date:

Sign

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

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input 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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Signature: Electronically signed by LAMBERT, LACEY (Reviewing Official) Date: 7/26/2021

Originally signed by Lacey Lambert on 7/26/2021

Rating Official's Name (Last, First, Middle): Malone, Adalyn Sign

Rating Official's Signature: Date:

Are you sure you want to sign this Performance Plan?
Have you met with this employee to discuss this Performance Plan? Yes No

5. Your signature now shows on the plan, and the employee will receive a notification to sign the plan.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Success! Your signature was successfully applied. The Employee will receive an email alerting them that it's time to sign their plan.

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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Signature: Electronically signed by LAMBERT, LACEY (Reviewing Official) Date: 7/26/2021

Originally signed by Lacey Lambert on 7/26/2021

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

Employee's Signature: Bypass Employee Signature Date:

Rating Official Process in Absence of Reviewing Official Signature

If the Reviewing Official signature is not available, you may sign the plan.

1. Click **Sign** in **Part 1: Employee Input**.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input 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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Name (Last, First, Middle): Malone, Adalyn **Sign**

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

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input 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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Name (Last, First, Middle): Malone, Adalyn **Sign**

Are you sure you want to sign this Performance Plan?
Have you met with this employee to discuss this Performance Plan? **Yes** No

3. Your signature now shows on the plan, and the employee will receive a notification to sign the plan.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Success! Your signature was successfully applied. The Employee will receive an email alerting them that it's time to sign their plan.

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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

Removing Signatures

1. The option to remove your signature will appear after you sign the plan. If you signed the plan by mistake or plan changes are needed after signing, click **Remove Signature**.

The screenshot shows the 'Part 1. Employee Input' section of the USA Performance system. The user is logged in as 'Malone, Adalyn'. The plan is for 'Wynn, Paige', a 'Supervisory Intel Analyst' at 'Chief Financial Officer' organization. The plan purpose is 'Annual'. The rating official's signature is 'Electronically signed by MALONE, ADALYN (Rating Official)' with a date of '7/26/2021'. A red box highlights the 'Remove Signature' button next to the signature. Below the signature, there is a 'Bypass Employee Signature' button.

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

This screenshot shows the same form as the previous one, but with a confirmation dialog at the bottom. The dialog asks 'Are you sure you want to remove your signature from this Performance Plan?' and has two buttons: 'Yes' (highlighted with a red box) and 'No'.

3. Your signature will be removed on the plan. The plan records the date of the original signature and additional signature actions will be documented in **Signature History**. All parties will need to sign the plan again to move to the monitoring phase.

USA Performance®
Home
Performance Management
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Malone, Adalyn

Employee Input
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Performance Elements
Narratives
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Print
Profile

Signatures were successfully removed. Once any changes have been made to the plan, the Reviewing Official will need to re-sign (if applicable), followed by the Rating Official, and then by the Employee.

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): Wynn, Paige
*Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst
Series: 0301
Pay Plan: GS
Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager
*Plan Purpose: Annual
PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Name (Last, First, Middle): Malone, Adalyn
Sign

Originally signed by Adalyn Malone on 7/26/2021

Plan History

Note: certain actions taken prior to July 30, 2021 do not appear in the history below.

	Adalyn Malone (Rating Official) Signed in Consultation	07/26/2021 4:02 PM ET
	Adalyn Malone (Rating Official) Removed Consultation signature	07/26/2021 4:14 PM ET

Bypass Employee Signatures

The Rating Official and Reviewing Official can bypass the employee signature in the planning or monitoring phase.

1. Click **Bypass Employee Signature**.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input 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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

Employee's Signature: Bypass Employee Signature Date:

2. Select the bypass reason from the *Signature Bypass Reason* dropdown.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

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 dropdown and select Bypass Employee Signature to confirm.

*Signature Bypass Reason: - Select -

Yes, Bypass Employee Signature

- Select -

Refused to sign

Unable to sign

Detail

On leave

Active duty

Other

Part 6. Instructions

All employees must be given with the communication of

Part 7. Performance Elements

sal rating, which will help determine their eligibility for within grade increases (WIGI), promotions, awards, and training. The process begins at the employee reads and understands the competencies in his/her plan, and signs for consultation.

3. Click **Yes, Bypass Employee Signature** to confirm your action.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

Employee Input Additional Instructions Performance Elements Narratives Documents Notes Signature History Save Print Profile

Reviewing Official's Name (Last, First, Middle): Lambert, Lacey

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating: Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

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: Active duty

Yes, Bypass Employee Signature No, Cancel

4. A confirmation will appear, and the employee signature is documented with the bypass reason.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

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

The Employee's signature was successfully bypassed. If you have questions about next steps, please contact an internal Performance Management representative.

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): Wynn, Paige *Appraisal Pd. 10/1/2021 - 9/30/2022

Title: Supervisory Intel Analyst Series: 0301 Pay Plan: GS Grade: 15

Organization: Chief Financial Officer

Supervisory Code: 2 - Supervisor or Manager *Plan Purpose: Annual PD Number:

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official: Remove Signature Date: 7/26/2021

Originally signed by Adalyn Malone on 7/26/2021

Employee's Signature: Unable to sign/see Part 10: MALONE, ADALYN Date: 7/26/2021

Originally bypassed by Adalyn Malone on 7/26/2021. Reason: Active duty

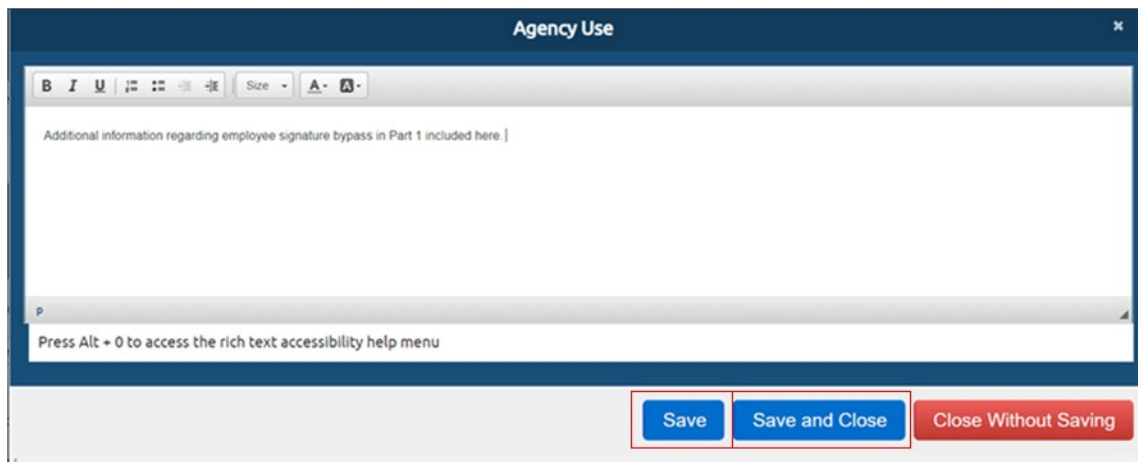
5. To document additional bypass information, click **Edit** in **Part 10. For Agency Use**.

USA Performance® Home Performance Management Reports Resources Malone, Adalyn

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

Part 10. For Agency Use Edit

6. Enter additional documentation in the *Agency Use* text box. Click **Save** or **Save and Close** upon completion.



7. **Part 10. For Agency Use** will show the documentation. Click Save on the navigation bar.

