



Rating Phase for Rating Officials

Review Employee Self-Accomplishment Narrative

An employee's self-accomplishment narrative will be available to a Rating Official once the employee releases it. Employees may release narratives after all signatures in **Part 2. Progress Review** are complete.

Agency policies indicate whether a self-accomplishment narrative is required, optional, or not available. Refer to agency policy for further guidance.

1. From the **Dashboard** page, click **Certify [Year] Employee Self-Accomplishment Narratives and Sign Plans**. The link will indicate if it is optional.

USA Performance[®] Dashboard Performance Plans Reports Resources Malone, Adalyn

Dashboard

Welcome, Adalyn Malone Human Resources

Tasks Requiring My Attention

My Active Plans
You have no pending tasks for your plans.

My Employees' Plans

- [Sign 2020 Plans as Rating Official](#) 1
- [Rate and Sign 2020 Plans](#) 1
- [Sign 2021 Plans as Rating Official](#) 2
- [Sign 2022 Plans as Rating Official](#) 3
- [Sign 2023 Plans as Rating Official](#) 5
- [Release 2023 Plans to Reviewing Official](#) 1
- [Rate and Sign 2023 Plans](#) 1
- [Certify 2023 Employee Self-Accomplishment Narratives and Sign Plans \(Optional\)](#) 1

Quick Links

Performance Plan
[View My 2023 Plan \(Active\)](#)
[View My Employees' Active Plans](#)

Help
[Contact the Help Desk](#)

2. The **Performance Plans** page will open filtered to show employee plans with self-accomplishment narratives to review.

3. Click the appropriate employee's name to navigate to the plan.

The screenshot shows the 'Performance Plans' section of the USA Performance system. At the top, there are navigation tabs: Dashboard, Performance Plans (selected), Reports, and Resources. A user profile for 'Malone, Adalyn' is in the top right. Below the tabs, the page title is 'Performance Plans: Certify 2023 Employee Self-Accomplishment Narratives and Sign Plans (Optional)'. There is a 'Save My Default View' button and a 'Select additional columns' dropdown. A table lists performance plans with columns: Name, Email, Plan Year, Phase, and Status. The first row shows 'Adams, Nevaeh' with email 'nevaeh.adams@pma.gov', Plan Year '2023', Phase 'Rating', and Status 'Active'. The 'Name' column header is highlighted with a red box. At the bottom, it says 'Showing 1 to 1 of 1 plans' with pagination controls.

4. The plan will open.

5. Click **Narratives** or scroll to **Part 9. Employee Self-Accomplishment Narrative**.

The screenshot shows the details of a performance plan for 'Adams, Nevaeh'. The top navigation bar is the same as the previous screenshot. Below it, there are icons for various functions: Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives (highlighted with a red box), Documents, Notes, Signature History, Save, Print, and Profile. The main content area is titled 'Part 1. Employee Input' and includes a checkbox for 'Eligible for eOPF' and a dropdown for 'Plan Status: Active'. Below this, there are fields for 'Employee Name (Last, First, Middle): Adams, Nevaeh', '*Appraisal Pd.' (10/1/2022 to 9/30/2023), 'Title:', 'Series: (No Se)', 'Pay Plan: GS', 'Grade: (No)', 'Organization: Human Resources', 'Supervisory Code: 8 - All Other Positions', '*Plan Purpose: Annual', 'PD Number:', 'Reviewing Official's Signature: Electronically signed by ESPINOZA, LEAH (Reviewing Official)', and 'Date: 1/9/2023'. At the bottom, it says 'Originally signed by Leah Espinoza on 1/9/2023'.

6. **Part 9. Employee Self-Accomplishment Narrative** will indicate the date the employee released the self-accomplishment narrative. Click **Verify Employee Self-Accomplishment Narrative Received**.

The screenshot shows the 'Part 9. Employee Self-Accomplishment Narrative' section of the performance plan details page. The top navigation bar is the same as the previous screenshot. Below it, there are icons for various functions: Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives (highlighted with a red box), Documents, Notes, Signature History, Save, Print, and Profile. The main content area is titled 'Part 8. Summary Rating Narrative' and includes an 'Edit' button. Below this, there is a section for 'Part 9. Employee Self-Accomplishment Narrative' with the text 'I met the requirements and exceeded all expectations' and 'Released to Rating Official on 5/17/2023'. A button labeled 'Verify Employee Self-Accomplishment Narrative Received' is highlighted with a red box. At the bottom, there is a section for 'Part 10. For Agency Use' with an 'Edit' button.

7. You will be asked to certify the employee's self-accomplishment narrative. Click **Yes**.

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

Part 9. Employee Self-Accomplishment Narrative

I met the requirements and exceeded all expectations

Released to Rating Official on 5/17/2023

Verify Employee Self-Accomplishment Narrative Received

I certify that I have read the employee's self-accomplishment narrative. **Yes** No

Part 10. For Agency Use Edit

8. The narrative will show in **Part 9. Employee Self-Accomplishment Narrative** with the date the employee released the self-accomplishment narrative and the date reviewed. These dates can be seen by the employee on the plan as well.

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

Part 8. Summary Rating Narrative Edit

Part 9. Employee Self-Accomplishment Narrative

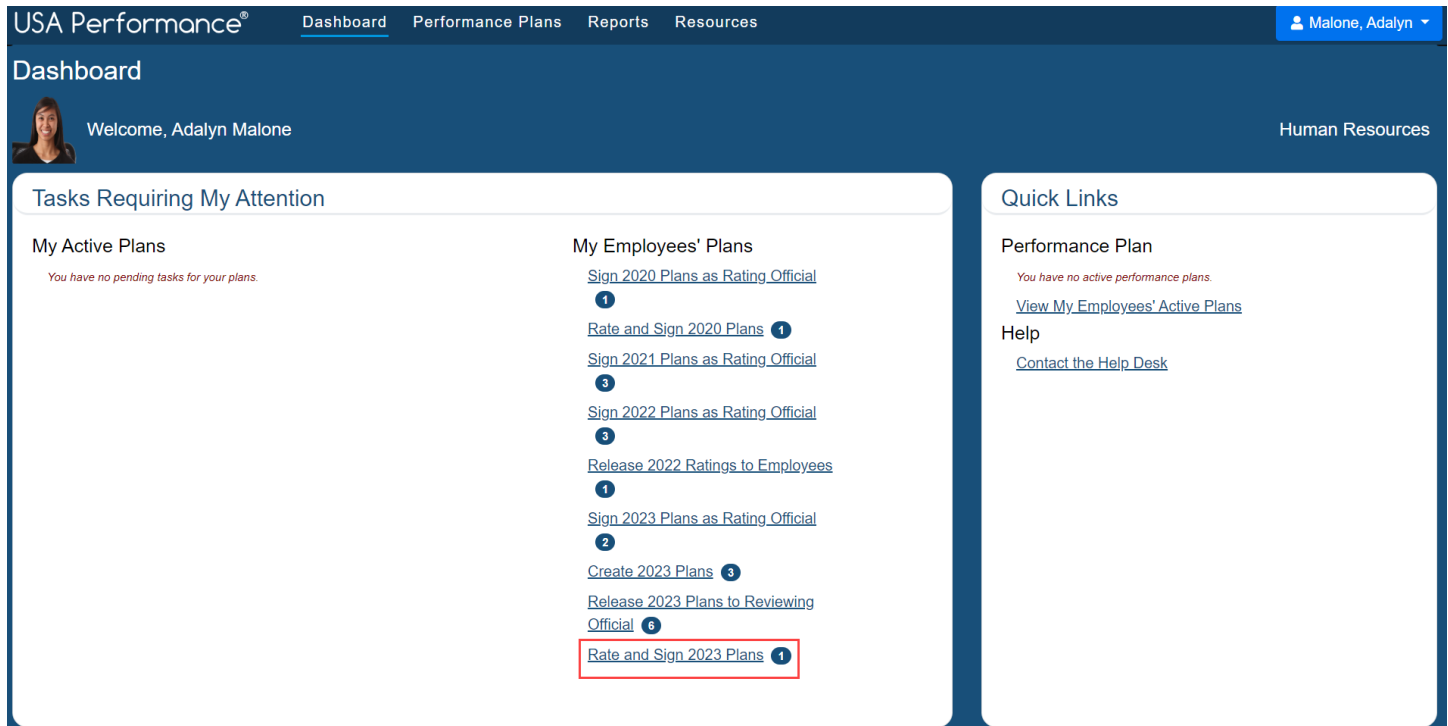
I met the requirements and exceeded all expectations

Released to Rating Official on 5/17/2023
Reviewed: 5/17/2023

Part 10. For Agency Use Edit

Rate a Performance Plan

1. From the **Dashboard** page, click **Rate and Sign [Year] Plans**.



The screenshot shows the USA Performance Dashboard. The top navigation bar includes 'Dashboard', 'Performance Plans', 'Reports', and 'Resources'. The user 'Malone, Adalyn' is logged in. The dashboard is divided into three main sections: 'Tasks Requiring My Attention', 'My Employees' Plans', and 'Quick Links'. The 'My Employees' Plans' section lists several tasks with numbered indicators. The task 'Rate and Sign 2023 Plans' is highlighted with a red box and a '1' indicator.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

Dashboard

Welcome, Adalyn Malone Human Resources

Tasks Requiring My Attention

My Active Plans
You have no pending tasks for your plans.

My Employees' Plans

- [Sign 2020 Plans as Rating Official](#) 1
- [Rate and Sign 2020 Plans](#) 1
- [Sign 2021 Plans as Rating Official](#) 3
- [Sign 2022 Plans as Rating Official](#) 3
- [Release 2022 Ratings to Employees](#) 1
- [Sign 2023 Plans as Rating Official](#) 2
- [Create 2023 Plans](#) 3
- [Release 2023 Plans to Reviewing Official](#) 6
- [Rate and Sign 2023 Plans](#) 1

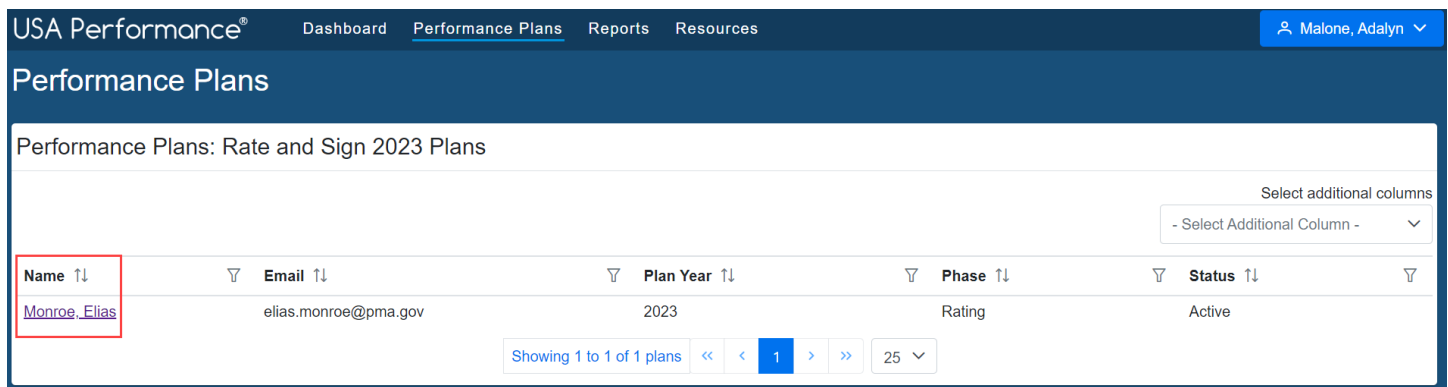
Quick Links

Performance Plan
You have no active performance plans.
[View My Employees' Active Plans](#)

Help
[Contact the Help Desk](#)

2. The **Performance Plans** page will open filtered to show employee plans available to rate.

3. Click the appropriate employee's name to navigate to the plan.



The screenshot shows the USA Performance Performance Plans page. The top navigation bar includes 'Dashboard', 'Performance Plans', 'Reports', and 'Resources'. The user 'Malone, Adalyn' is logged in. The page title is 'Performance Plans: Rate and Sign 2023 Plans'. Below the title is a table with columns: Name, Email, Plan Year, Phase, and Status. The first row shows 'Monroe, Elias' with email 'elias.monroe@pma.gov', Plan Year '2023', Phase 'Rating', and Status 'Active'. The 'Name' column is highlighted with a red box. At the bottom, there is a pagination bar showing 'Showing 1 to 1 of 1 plans' and a dropdown menu for '25'.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

Performance Plans

Performance Plans: Rate and Sign 2023 Plans

Select additional columns
- Select Additional Column -

Name ↑↓	Email ↑↓	Plan Year ↑↓	Phase ↑↓	Status ↑↓
Monroe, Elias	elias.monroe@pma.gov	2023	Rating	Active

Showing 1 to 1 of 1 plans << < 1 > >> 25

4. The plan will open.

5. Scroll to **Part 7. Performance Elements** or click **Performance Elements** in the navigation bar.

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

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

Narratives

Agency policies indicate whether a *Rating Official Element Narrative* or a *Summary Rating Narrative* is required, optional, or not available. Refer to agency policy for specific guidance.

Rating Official Element Narrative

1. If policy allows, you may add element narratives.
2. Click **Edit** for the appropriate *Rating Official Element Narrative*.

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

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.

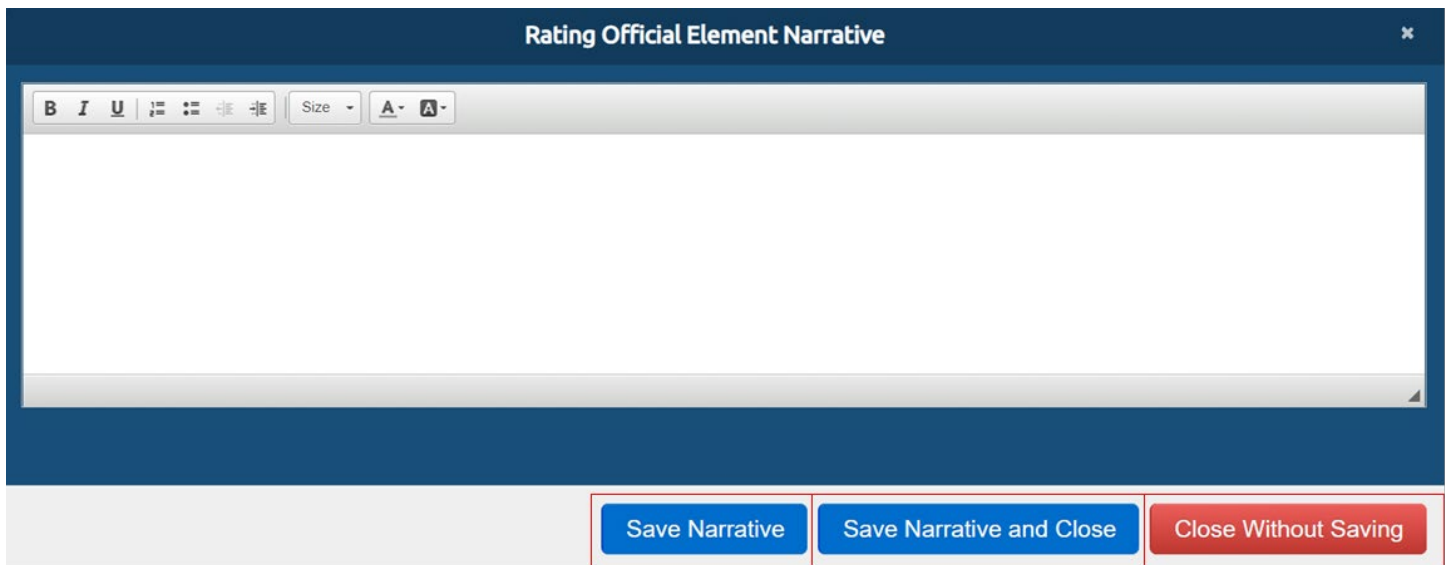
Fully Successful:
Meets competency definition and has brief contact with customers with limited needs. Provides routine information about products and services. Provides standard products or routine services to customers. Resolves simple problems, questions, or complaints; directs complex or non-routine 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:
Attended customer service training.
Received the employee of quarter award for implementing new customer onto system, providing over 20 live trainings, and receiving an average of 9.0 on training feedback surveys.

Rating Official Element Narrative: **Edit**

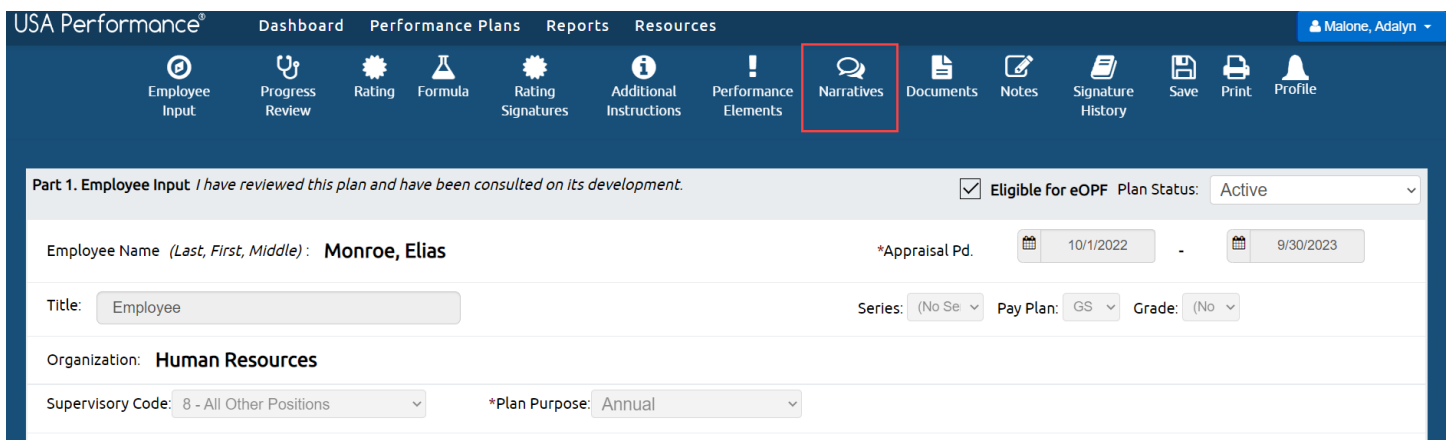
3. Type your narrative in the *Rating Official Element Narrative* text box. You may edit the text style by using the rich text editor selections. Click **Save Narrative**, **Save Narrative and Close**, or **Close Without Saving**.



4. The narrative will appear in the *Rating Official Element Narrative* text box. If updates are needed, click **Edit** to open the text box.

Summary Rating Narrative

1. If policy allows, you may add a summary rating narrative.
2. Scroll to **Part 8. Summary Rating Narrative** or click **Narratives** in the navigation bar.



3. Click **Edit** for the **Part 8. Summary Rating Narrative**.

The screenshot shows the top navigation bar of the USA Performance application. The user is logged in as 'Malone, Adalyn'. The main menu includes options like Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives, Documents, Notes, Signature History, Save, Print, and Profile. The 'Part 8. Summary Rating Narrative' section is highlighted, and the 'Edit' button is circled in red.

4. Type your narrative in the *Summary Rating 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**. Save your changes by clicking **Save** in the navigation bar.

The screenshot shows the 'Summary Rating Narrative' text editor. It features a rich text toolbar with options for bold, italic, underline, bulleted list, numbered list, link, unlink, text color, and background color. The text area is empty. At the bottom, there are three buttons: 'Save Narrative', 'Save Narrative and Close', and 'Close Without Saving'.

5. The narrative will appear in **Part 8. Summary Rating Narrative**. If updates are needed, click **Edit** to open the text box.

Ratings

Agency policies indicate the number of summary and element rating levels, the name of each summary and element rating levels, if the elements are weighted and how summary rating levels are calculated. In some cases, the summary rating level is automatically calculated. In others, the Rating Official may need to indicate the summary rating level. Refer to agency policy for further guidance.

1. Scroll to the appropriate element. The element will indicate if it is critical and the assigned weight if applicable.
2. To apply a rating, click the box to the left of the rating level name. Click **Save** in the navigation bar.

USA Performance®

DashboardPerformance PlansReportsResources

Malone, Adalyn

Employee Input

Progress Review

Rating

Formula

Rating Signatures

Additional Instructions

Performance Elements

Narratives

Documents

Notes

Signature History

Save

Print

Profile

Customer Service Rating Levels:

☐ Unacceptable

☐ Marginally Successful

☐ Fully Successful

☐ Exceeds Fully Successful

☐ Outstanding

Work Accomplishment

☒ Critical

Strategic Alignment:

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

Executes and implements project plans and other assigned work. Additional information included here on how PE relates to Strategic Goal 6.

Fully Successful:

Timeliness: Projects are adequately planned to ensure completion within established time frames. Promptly responds to customer inquiries in timely manner. Quantity: Performs an appropriate amount of work, considering scope and grade level. Quality: Completed work products are accurate and adequately meet the goal of the assignment.

Employee Element Self-Accomplishment Narrative:

Rating Official Element Narrative:

Edit

Work Accomplishment Rating Levels:

☐ Unacceptable

☐ Marginally Successful

☐ Fully Successful

☐ Exceeds Fully Successful

☐ Outstanding

- If the element contains sub-elements, click the box to the left of the rating level name to rate each sub-element. Then apply the rating at the element level by clicking the box to the left of the rating level name.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

<< View Previous Plan Rate and Sign 2023 Plans (5) Select Next Plan: Johnson, Mya's 2023 Plan View Selected Plan View Next Plan >>

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

Technical Competence ☒ Critical

Strategic Alignment: Applicable Goal or Strategy

Uses knowledge that is acquired through formal training or extensive on the job experience to perform one's job; works with, understands, and evaluates technical information related to the job; advises others on technical issues. Applies knowledge of Federal human resource laws, regulations, agency policies and procedures, and issues related to the compliance with the above (e.g., findings of OPM's Office of Merit Systems Compliance, the Merit Systems Protection Board, the Federal Labor Relations Authority, the Equal Employment Opportunity Commission, and the Courts); knows how to use job-related computer systems and software.

Effective:
This is a level of solid to very good performance. The quality and quantity of the work under this element meet and may occasionally, or even often, exceed expectations. Products are reliably produced within the expected timeframes and generally comply with applicable statutes, regulations, policies and procedures. Exhibits skills in organizing multiple assignments and adjusting to changing priorities. Communicates verbally and in writing with clarity and effectiveness. Products are generally well received and easily understood by the target audience. Demonstrates teamwork and collaboration.

Sub-Element 1 Standard

Strategic Alignment: Strategic Goal 2 - Communicating Effectively: Use plain English when communicating throughout the agency for improved knowledge and information sharing.

Sub-Element 1 Standard.

Sub-Element 1 Standard Rating Levels: ☐ Unacceptable ☐ Effective ☐ Distinguished

Rating Official Element Narrative: [Edit](#)

Technical Competence Rating Levels: ☐ Unacceptable ☐ Effective ☐ Distinguished

- If the agency policy instructs to automatically calculate the summary rating, once you indicate all element ratings and save the plan, the summary rating will populate. Summary ratings will not appear until the plan is saved.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

<< View Previous Plan Rate and Sign 2023 Plans (5) Select Next Plan: Johnson, Mya's 2023 Plan View Selected Plan View Next Plan >>

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

Reason Employee Signature Bypassed: On leave

Part 3. Rating

Summary Rating Levels: ☐ Unacceptable ☐ Effective ☐ Distinguished

Unacceptable: Issued to those employees who receive a rating of Unacceptable in one or more of their individual CEs. (A rating of Unacceptable on a non-CE will not result in a summary level of Unacceptable.)

Effective: Issued to those employees who receive a rating of Effective on one half or more of their individual CEs/non-CEs, and none of the CEs are rated Unacceptable.

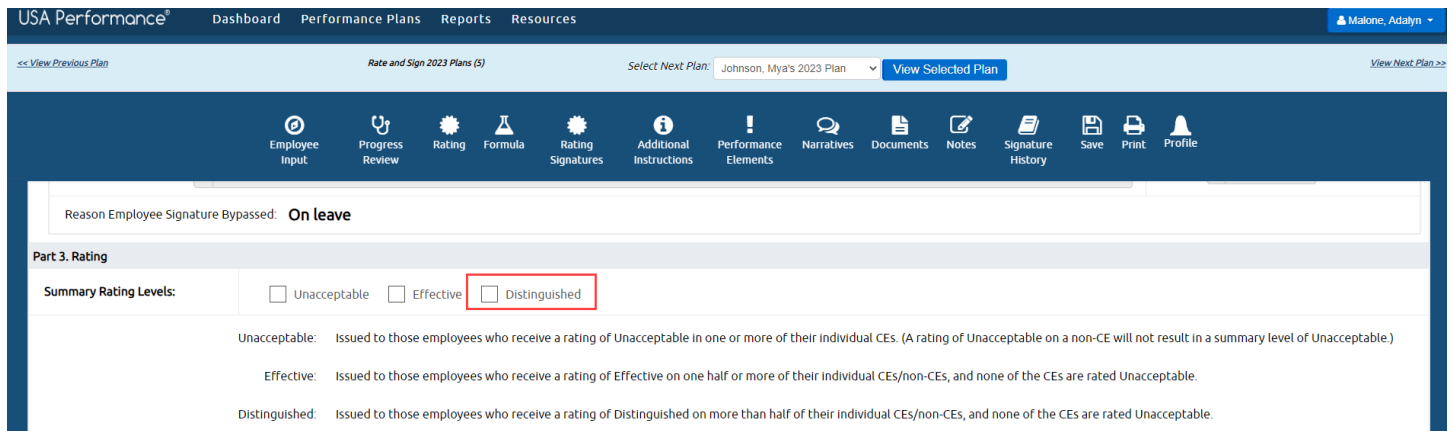
Distinguished: Issued to those employees who receive a rating of Distinguished on more than half of their individual CEs/non-CEs, and none of the CEs are rated Unacceptable.

Part 4. Derivation Formula and Calculation of Annual Summary Rating

Performance Element/Performance Element Group	Rating Level	Rating Value	Summary Level Ranges
Technical Competence *			3.01 - 5 = Distinguished
Financial Accountability *			1.01 - 3 = Effective
Customer Service *			0 - 1 = Unacceptable
Mean Rating Individual Element Rating Total / Number of elements: 0/3	0		Note: A Level 1 Rating on any Critical Element yields a Level 1 Summary Rating

* Denotes Critical Element
~ Denotes Overridden Rating
x Denotes PE not included in Rating Calculations

5. If the agency policy instructs the Rating Official to indicate the summary rating level, once you indicate all element ratings, click to indicate the summary rating level. Click **Save** in the navigation bar.



USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

<< View Previous Plan Rate and Sign 2023 Plans (5) Select Next Plan: Johnson, Mya's 2023 Plan View Selected Plan View Next Plan >>

Reason Employee Signature Bypassed: On leave

Part 3. Rating

Summary Rating Levels:

☐ Unacceptable ☐ Effective ☒ Distinguished

Unacceptable: Issued to those employees who receive a rating of Unacceptable in one or more of their individual CEs. (A rating of Unacceptable on a non-CE will not result in a summary level of Unacceptable.)

Effective: Issued to those employees who receive a rating of Effective on one half or more of their individual CEs/non-CEs, and none of the CEs are rated Unacceptable.

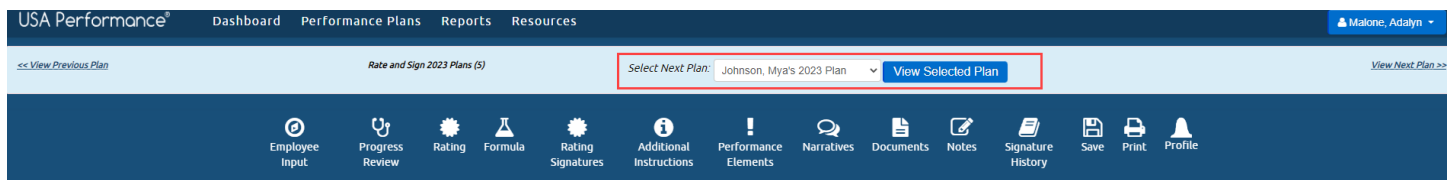
Distinguished: Issued to those employees who receive a rating of Distinguished on more than half of their individual CEs/non-CEs, and none of the CEs are rated Unacceptable.

6. The plan is now rated and ready for signatures.

Sign a Performance Plan in the Rating Phase

Agency policies indicate whether a Reviewing Official signature is required, optional, or not available. Refer to agency policy for further guidance.

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**.



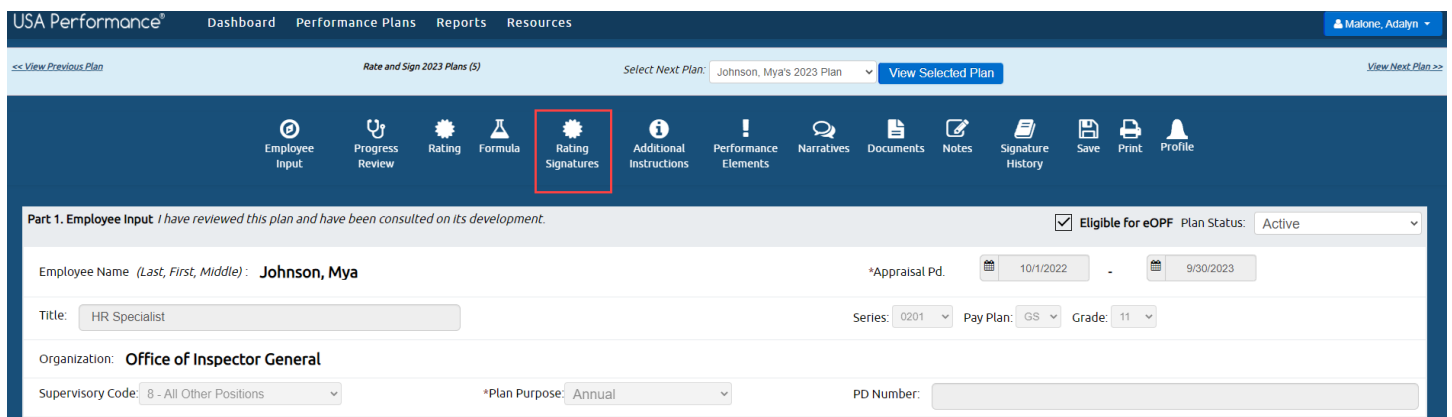
USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

<< View Previous Plan Rate and Sign 2023 Plans (5) Select Next Plan: Johnson, Mya's 2023 Plan View Selected Plan View Next Plan >>

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

Rating Official Process when Reviewing Official Signature is Required or Optional

7. Click Rating Signatures or scroll to Part 5. Rating Signatures.



USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

<< View Previous Plan Rate and Sign 2023 Plans (5) Select Next Plan: Johnson, Mya's 2023 Plan View Selected Plan View Next Plan >>

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): Johnson, Mya *Appraisal Pd. 10/1/2022 - 9/30/2023

Title: HR Specialist Series: 0201 Pay Plan: GS Grade: 11

Organization: Office of Inspector General

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

8. Click **Sign** in **Part 5. Rating Signatures**.

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

Part 5. Rating Signatures

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

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

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

9. You will be asked to confirm your action. If agency policy allows for optional narratives, the confirmation will list any optional narratives not yet completed for your review. Click **No** to return to the optional narratives or click **Yes** to sign.

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 Critical Element
^ Denotes Overridden Rating
x Denotes PE not included in Rating Calculations

Part 5. Rating Signatures

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

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

Are you sure you want to sign this Rating?
Yes **No**

10. The Reviewing Official will receive a notification to review and sign the plan.

11. Once the Reviewing Official signs, you may release the rating to the employee. The employee will not see the rating until it is released. Return to **Part 5. Rating Signatures** and click **Release to Employee**.

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

Part 5. Rating Signatures

Reviewing Official's Signature: Electronically signed by ESPINOZA, LEAH (Reviewing Official) Date: 7/29/2023

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Release to Employee Date: 7/29/2023

Employee's Signature: Date:

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

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 Critical Element
^ Denotes Overridden Rating
x Denotes PE not included in Rating Calculations

Part 5. Rating Signatures

Reviewing Official's Signature: Electronically signed by ESPINOZA, LEAH (Reviewing Official) Date: 7/29/2023

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Release to Employee Date: 7/29/2023

Are you sure you want to release the rating to the Employee to sign?
Yes No

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

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

Part 5. Rating Signatures

Reviewing Official's Signature: Electronically signed by ESPINOZA, LEAH (Reviewing Official) Date: 7/29/2023

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/29/2023

Employee's Signature: Bypass Employee Signature Date:

14. Once the employee signs, the plan will show as a *Completed* status.

Rating Official Process in Absence of Reviewing Official Signature

If the Reviewing Official signature is not necessary, only the Rating Official needs to sign prior to releasing the rating to the employee.

1. Click **Rating Signatures** or scroll to Part 5. Rating Signatures.

The screenshot shows the USA Performance system interface. The top navigation bar includes 'USA Performance', 'Dashboard', 'Performance Plans', 'Reports', and 'Resources'. The user 'Malone, Adalyn' is logged in. The main navigation bar contains icons for 'Employee Input', 'Progress Review', 'Rating', 'Formula', 'Rating Signatures' (highlighted with a red box), 'Additional Instructions', 'Performance Elements', 'Narratives', 'Documents', 'Notes', 'Signature History', 'Save', 'Print', and 'Profile'. The main content area is titled 'Part 1. Employee Input: I have reviewed this plan and have been consulted on its development.' It includes fields for 'Employee Name (Last, First, Middle): Monroe, Elias', 'Title: Employee', 'Organization: Human Resources', 'Supervisory Code: 8 - All Other Positions', and 'Plan Purpose: Annual'. There are also fields for 'Appraisal Pd.' (10/1/2022) and 'End Date' (9/30/2023).

2. Click **Sign** in **Part 5. Rating Signatures**.

The screenshot shows the 'Part 5. Rating Signatures' section of the USA Performance system. It includes a checkbox for 'Request Reviewing Official'. Below this are fields for 'Rating Official's Signature' and 'Employee's Signature', each with a search icon. To the right of the 'Rating Official's Signature' field is a blue 'Sign' button (highlighted with a red box) and a 'Date' field. To the right of the 'Employee's Signature' field is another 'Date' field. A note at the top left of the section states: 'x Denotes PE not included in Rating Calculations'.

3. You will be asked to confirm your action.

- If agency policy allows for optional narratives, the confirmation will list any optional narratives not yet completed for your review. Click **No** to return to the optional narratives.
- Click **Yes** to sign the rating and release to the employee later.

- Click **Sign and Release to Employee** to both sign the rating and release the rating to the employee.

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

- Once the employee signs, the plan will show as a *Completed* status.

Rating Official Bypass Employee's Signature

There may be exceptions when the Rating Official or Reviewing Official will need to bypass the employee's signature. Exceptions may include, but not limited to, employee being on leave, detail, active duty, or the employee refuses to sign.

- Click **Rating Signatures** or scroll to **Part 5. Rating Signatures**.

2. Click **Bypass Employee Signature**.

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

Part 5. Rating Signatures

Reviewing Official's Signature: Electronically signed by ESPINOZA, LEAH (Reviewing Official) Date: 7/29/2023

Rating Official's Signature: Electronically signed by MALONE, ADALYN (Rating Official) Remove Signature Date: 7/29/2023

Employee's Signature: Bypass Employee Signature Date:

3. You will be asked to select a *Signature Bypass Reason* from the drop-down menu. Click **Yes, Bypass Employee Signature** to sign on behalf of employee or click **No, Cancel** to return.

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

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

Employee's Signature: Bypass Employee Signature Date:

You have chosen to bypass the employee signature. Select the reason from the drop-down, then click Bypass Employee Signature to confirm. Use Part 10. Agency Use to further document the refusal/inability to sign (optional).

*Signature Bypass Reason: - Select -

- Yes, Bypass Employee Signature
- Refused to sign
- Unable to sign
- Detail
- On leave
- Active duty
- Separated/Departed Agency

Part 6. Instructions

All employees must be given a performance rating, which will help determine their eligibility for within grade increases (WIGI), promotions, awards, and training. The process begins

4. You will receive a success message.

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

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: Completed

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

5. Scroll to **Part 10. For Agency Use** and click **Edit**. Annotate the employee's refusal or inability to sign the plan in the text box with the name and title of the employee. You will be asked to confirm your action. Click **Save**, **Save and Close**, or **Close Without Saving**.

The screenshot shows the USA Performance interface. The top navigation bar includes 'USA Performance', 'Dashboard', 'Performance Plans', 'Reports', and 'Resources'. A user profile 'Malone, Adalyn' is in the top right. 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 two sections: 'Part 9. Employee Self-Accomplishment Narrative' and 'Part 10. For Agency Use'. The 'Part 10. For Agency Use' section is highlighted with a red box, and an 'Edit' button is also highlighted with a red box.

The screenshot shows the USA Performance interface with a modal window titled 'Agency Use' open. The modal window has a text area for input and three buttons at the bottom: 'Save', 'Save and Close', and 'Close Without Saving'. The background shows the same interface as the previous screenshot, with 'Part 10. For Agency Use' and the 'Edit' button visible.

6. The explanation will now appear on the plan.

The screenshot shows the USA Performance interface. The top navigation bar and toolbar are the same as in the previous screenshots. The main content area shows 'Part 9. Employee Self-Accomplishment Narrative' and 'Part 10. For Agency Use'. Below the 'Part 10. For Agency Use' section, the text 'Employee [Name], [Job Title], is unable to sign due to detail.' is displayed. An 'Edit' button is visible to the right of the text.

7. The signature action with the date and time will be documented in **Signature History**.

The screenshot shows the USA Performance interface. The top navigation bar includes links for Dashboard, Performance Plans, Reports, and Resources. Below this is a secondary bar with icons for Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives, Documents, Notes, Signature History (highlighted with a red box), Save, Print, and Profile. The main content area shows 'Part 9. Employee Self-Accomplishment Narrative' and 'Part 10. For Agency Use' with an 'Edit' button.

The screenshot shows the USA Performance interface with a 'Plan History' modal window open. The modal lists the following actions:

User	Action	Date and Time
Adalyn Malone (Rating Official)	Created the Plan	01/11/2023 1:39 PM ET
Adalyn Malone (Rating Official)	Signed in Consultation	03/14/2023 9:56 AM ET
Adalyn Malone (Rating Official)	Bypassed Employee signature	03/14/2023 9:56 AM ET
Adalyn Malone (Rating Official)	Signed Progress Review	07/17/2023 2:11 PM ET
Adalyn Malone (Rating Official)	Bypassed Employee Progress Review signature	07/17/2023 2:11 PM ET
Adalyn Malone (Rating Official)	Signed and released rating	07/17/2023 2:12 PM ET
Adalyn Malone (Rating Official)	Noted Employee refused to sign	07/17/2023 2:52 PM ET

Rating Official Process with a Performance Appraisal Certification

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.

The screenshot shows the USA Performance interface with the 'Part 5. Rating Signatures' section. It includes fields for Reviewing Official's Signature, Rating Official's Signature, Employee's Signature, and Performance Appraisal Certifier Signature. The Rating Official's Signature field is populated with 'Electronically signed by MALONE, ADALYN (Rating Official)'. There are buttons for 'Certify', 'Bypass Signature', and 'Remove Signatures'.

Removing Signatures

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

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: (Required) Date:

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

Employee's Signature: Date:

Performance Appraisal Certifier Signature: Date:

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

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

No Evaluation Notes

Mean Rating Individual Element Rating Total / Number of elements: 15/3 5 Note: A Level 1 Rating on any Critical Element yields a Level 1 Summary Rating

* Denotes Critical Element
^ Denotes Overridden Rating
* Denotes PE not included in Rating Calculations

Part 5. Rating Signatures

Reviewing Official's Signature: (Required) Date:

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

Are you sure you want to remove your signature from this Rating?
Yes No

Employee's Signature: Date:

2. Your signature will no longer show on the rating. If the Reviewing Official had previously signed, the Reviewing Official signature will also no longer show on the plan. The plan records the date of the original signature and additional signature actions will be documented in **Signature History**.

The screenshot displays the 'USA Performance' interface. The top navigation bar includes 'Dashboard', 'Performance Plans', 'Reports', and 'Resources'. A secondary bar contains icons for 'Employee Input', 'Progress Review', 'Rating', 'Formula', 'Rating Signatures', 'Additional Instructions', 'Performance Elements', 'Narratives', 'Documents', 'Notes', 'Signature History' (highlighted with a red box), 'Save', 'Print', and 'Profile'. The user 'Malone, Adalyn' is logged in.

Part 5. Rating Signatures

Reviewing Official's Signature: (Required) Date:

Rating Official's Signature: Date:

Employee's Signature: Date:

Plan History

	Bypassed Employee signature	
	Adalyn Malone (Rating Official)	01/10/2023 12:30 PM ET
	Signed Progress Review	
	Adalyn Malone (Rating Official)	01/10/2023 12:30 PM ET
	Bypassed Employee Progress Review signature	
	Leah Espinoza (Reviewing Official)	01/10/2023 12:31 PM ET
	Signed Progress Review	
	Adalyn Malone (Rating Official)	01/10/2023 1:21 PM ET
	Signed rating	
	Odin Abbott (Performance Appraisal Certifier)	01/10/2023 1:34 PM ET
	Signed Performance Appraisal Certification	
	Leah Espinoza (Reviewing Official)	01/10/2023 1:44 PM ET
	Signed rating	
	Adalyn Malone (Rating Official)	01/10/2023 1:50 PM ET
	Released rating	
	Adalyn Malone (Rating Official)	01/10/2023 2:04 PM ET
	Removed Rating signature	
	Adalyn Malone (Rating Official)	01/10/2023 2:04 PM ET
	Signed rating	

3. Once the employee signs, the plan will show as a *Completed* status. The option to remove a signature is no longer available.