

NFC

Procedures



National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

June 2010

EmpowHR – Version 9.0 Section 10 – Manage Performance

TITLE I
Payroll/Personnel Manual

CHAPTER 17
EmpowHR

SECTION 10
Manage Performance

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Manage Performance

Manage Performance, which includes performance plans, progress reviews, and performance appraisals, is a guide to recognize and reward quality of work performance and develop those employees that are not performing proficiently by providing training and counseling. These transactions are processed for all employees. HR can view and edit the performance documents, and monitor the performance process through queries and reports.

The HR Performance Plan option allows HR personnel to view and edit individual employee performance plans; reset the status flags to transmit performance ratings to NFC; view Performance Plan start and end dates, Next Performance Plan date, rating scale and their employment information; and view and edit the Elements and Standards tab.

Below is an example of a Manage Performance Workflow:

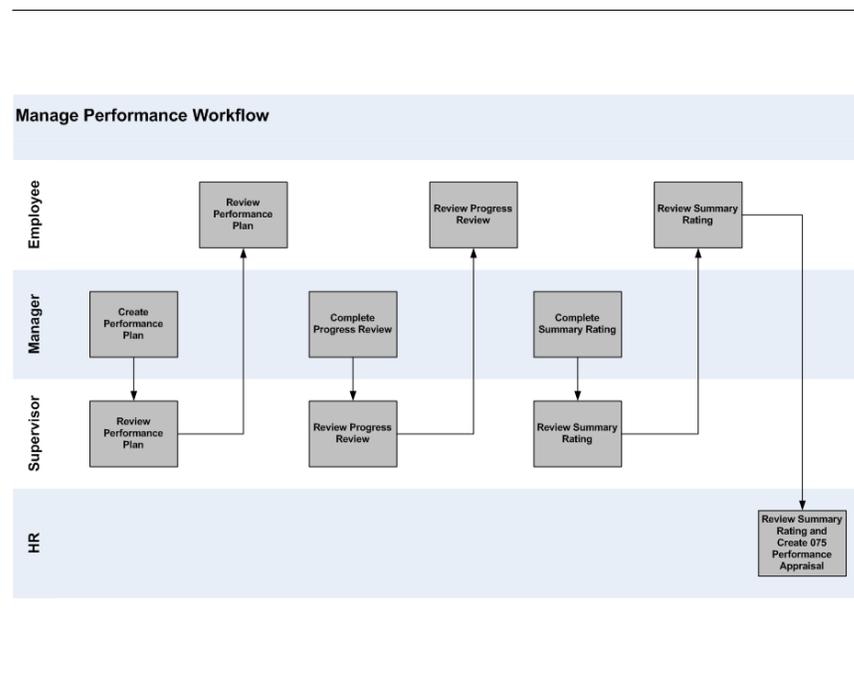


Figure 1. Manage Performance Workflow

Below is an example of the Manage Performance Data Flow:

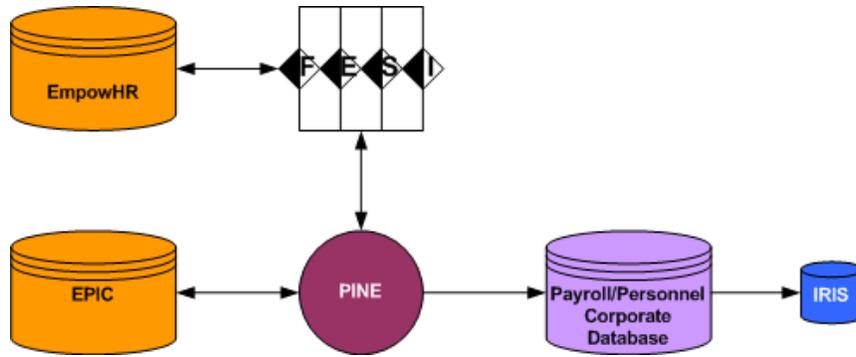


Figure 2. Manage Performance Data Flow

Use

EmpowHR administrators have access to the Manage Performance menu group. This menu group allows authorized users to review and edit existing performance documents such as: Performance Plans, Progress Reviews, Summary Ratings, and Performance Appraisals. This menu group also permits the deletion of Performance Appraisals in case of a mistakenly created record.

This section contains information on the following topics:

[Performance Plan](#)

[Progress Review](#)

[Summary Rating](#)

[075 Performance Appraisal](#)

[Performance Deletion](#)

Performance Plan

A Performance Plan is a written document that identifies the employee's critical elements and performance standards by which s/he will be rated. Only the Rating Official and/or employee can initiate a new performance plan for a new appraisal period. A performance plan must be in place for a minimum appraisal period (minimum 90 calendar days), normally, no longer than 15 months for a rating period to be conducted.

A minimum of three (3) elements with at least only being critical and a maximum of seven (7) elements are required in a Performance Plan.

HR can view Performance Plan start and end dates, Next Performance Plan date, rating scale and employment information. HR can also view and edit the Elements and Standards tab.

This section contains the following topic:

[Viewing/Editing Performance Plan Data](#)

Viewing/Editing Performance Plan Data

To view/editing Performance Plan data:

1. Select the ***Manage Performance*** menu group.
2. Select the ***Use*** menu.
3. Select the ***HR Views/Edit Performance Plan*** component. The Find An Existing Value tab - HR Views/Edits Performance Plan page (**Figure 3**) is displayed.

HR Views/Edits Performance Plan
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:

Review Period From:

[Basic Search](#) [Save Search Criteria](#)

Figure 3. Find An Existing Value tab - HR Views/Edits Performance Plan page

- Complete the fields as follows:

EmplID Enter the employee ID.

Review Period From Enter the review period begin date or select a data from the calendar icon.

- Click **Search**. The Performance Plan tab - HR Views/Edits Performance Plan page (**Figure 4**) is displayed. If an EmplID is entered and a message is received **No Matching Values Found**, then there may not be a plan set up for the employee or the EmplID was entered incorrectly.

Performance Plan [Comments and Standards](#)

Allerton Michael K. EmplID: 010402

Performance Plan Start Date: 09/10/2009

Performance Plan End Date: 09/30/2010

Next Performance Plan By: 09/01/2010 Rating Scale:

Agency: AD FA Farm Service Agency
Department: 00207 DISTRICT 2 Position: 00225156
Job Code: 002015 SLPVY AGRIL DIST DIR Pay Plan: 05 1101 13

Viewed/Discussed Plan
Last Updated Date: 09/22/2009

Created the Plan
 Finished Plan
Last Updated Date: 09/22/2009

[Return to Employee List](#)

Figure 4. Performance Plan tab - HR Views/Edits Performance Plan page

- Complete the fields as follows:

Performance Plan Start Date This field is populated with the performance plan start date.

Performance Plan End Date Enter the performance plan end date or select a date from the calendar icon.

Next Performance Plan By Enter the the date when the next performance plan is due or select a date from the calendar icon.

The Performance Plan window (**Figure 4**) identifies that the Rating Official or the employee created the plan. Since the appraisal period generally begins on October 1 of each year and ends on September 30 of the following year; both the end date and the next performance plan date are system-generated based on those dates. Fields on the Performance Plan and the Elements and Standards window can be viewed, modified, printed, or deleted based on Agency policy.

The Employment Information portion of the Performance Plan window displays the position information of the employee occupied at the time the plan was created. If this block is incorrect, then HR should review the position information and make the necessary corrections in Position and/or PARs, whichever is appropriate.

The Viewed portion of the window displays the dates when the Rating Official and employee viewed, last updated, and/or finalized the plan. The employee **must** check this box whether the plan was created by the Rating Official or by the employee. The Rating Official must finalize the plan before a progress review or summary rating can be entered.

7. Click **Save**. Complete one of the following steps as applicable:

| Step | Description |
|------------------------------------|--|
| Click Return To Search | To return for another performance plan. |
| Click Next Tab | To view the next tab. |
| Click Notify | To notify a person in the workflow that the transaction is in their worklist. |
| Click Create Printable Form | This bulletin displays the information from the Performance Plan tab and Elements and Standards tab in a printable form. |
| Click Save Draft Plan | To save the draft performance plan. |

8. Click the **Elements and Standards** tab. the Elements and Standards tab - HR Views/Edits Performance Plan page (**Figure 5**) is displayed.

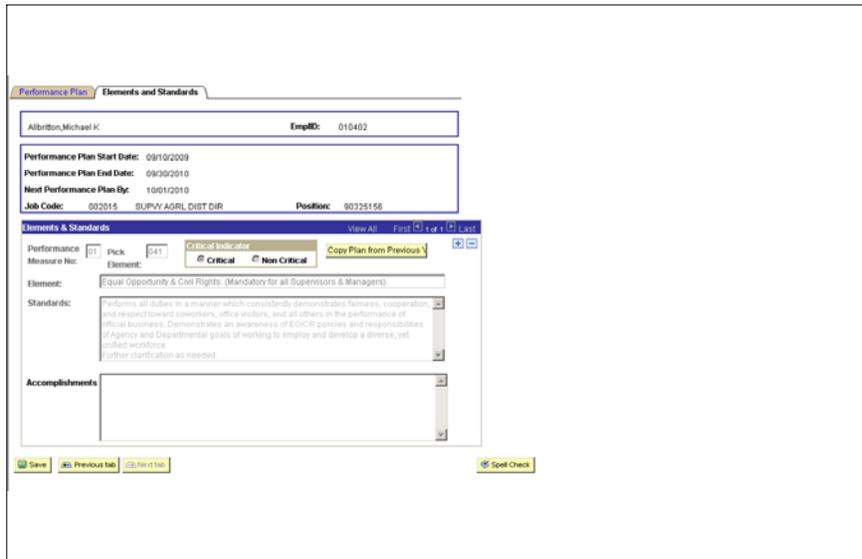


Figure 5. Elements And Standards tab - HR Views/Edits Performance Plan page

- The portions on this window are explained below.

Critical Element - A critical element is a work assignment or responsibilities of such importance that unacceptable performance in the element would result in a determination that the employee’s overall performance is unacceptable.

Additional Performance Element - A dimension or aspect of the employee team, or organizational performance that is not a critical element or non-critical element. Additional elements may be added to a plan. Also refer to your agency policy for additional guidance.

Performance Standard - The performance standard is a management-approved expression of the performance, threshold(s), or expectation(s) that must be met to be appraised at a particular level of performance, A performance standard may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

Accomplishments - Accomplishments is information that is entered during the year or at the end of the performance year to list the employees accomplishment for the each selected element.

- Click **Save**. Complete one of the following steps, as applicable:

| Step | Description |
|--------------------------------------|---|
| Click Return To Search | To search for another performance plan. |
| Click Previous Tab | To view the previous tab. |
| Click Notify | To notify a person in the workflow that the transaction is in their worklist. |
| Click Copy Plan From Previous | To copy a plan from the previous plan. |

Progress Review

The Progress Review is a joint discussion between the Rating Official and the employee regarding the Employee's progress toward achieving the performance standards. It does not involve the issuance of a rating of record. Progress reviews are conducted as least once during a full appraisal period. Normally, these required reviews would be accomplished during the midpoint of the appraisal period. Comment may be entered by the Rating Official and/or employee. The Rating Official must finalize the plan before a progress review can be added.

The HR Views/Edits Progress Review is a custom option where HR personnel can view and edit Progress Reviews. HR can view the Performance Plan Start and End Dates, Next Performance Plan Date, Rating Scale and Employment information, and the information on the Elements and Standards tab.

This section contains the following topic:

[Viewing/Editing Progress Review Data](#)

Viewing/Editing Progress Review Data

To view/edit Progress Review data:

1. Select the **Manage Performance** menu group.
2. Select the **Use** menu.
3. Select the **HR Views/Edit Progress Review** component.
4. The Find An Existing Value tab - HR Views/Edits Progress Review page (**Figure 6**) is displayed.



The screenshot shows the 'HR Views/Edits Progress Review' page with the 'Find an Existing Value' tab selected. The page title is 'HR Views/Edits Progress Review' and the instruction is 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria section includes: 'EmpID:' with a dropdown menu set to 'begins with' and an adjacent text input field; 'Review Period From:' with a dropdown menu set to '=' and an adjacent date input field with a calendar icon. At the bottom, there are buttons for 'Search' (yellow), 'Clear' (light green), and a link for 'Basic Search' (blue), along with a 'Save Search Criteria' link (blue) with a floppy disk icon.

Figure 6. Find An Existing Value tab - HR Views/Edits Progress Review page

5. Complete the fields as follows:

EmpID Enter the employee ID.

Review Period From Enter the date the progress review started or select a date from the calendar icon.

- Click **Search**. The Progress Review tab - HR Views/Edits Progress Review page (**Figure 7**) is displayed.

OR

Click **Clear** to clear the entry on the window. Another entry can be made at this time.

Figure 7. Progress Review tab - HR Views/Edits Progress Review page

- Click the **Elements and Standards** tab. the Elements and Standards tab - HR Views/Edits Progress Review page (**Figure 8**) is displayed.

Figure 8. Elements And Standards tab - HR Views/Edits Progress Review page

- Click **Save**. At this point, the following options are available:

| Step | Definition |
|-------------------------------|---|
| Click Return To Search | To search for another performance plan. |
| Click Previous Tab | To view the previous tab. |
| Click Notify | To notify a person in the workflow that the transaction is in their worklist. |

Summary Rating

The HR Views/Edits Summary Rating is a custom option where HR personnel can view or edit Summary Ratings. HR can view the Performance Plan Start and End Dates, Next Performance Plan Date, Rating Scale and Employment information, Overall Summary Rating and the information on the Elements and Standards tab.

This section contains the following topic:

[Viewing/Editing Summary Rating Data](#)

Viewing/Editing Summary Rating Data

To view/edit Summary Rating data:

1. Select the **Manage Performance** menu group.
2. Select the **Use** menu.
3. Select the **HR Views/Edits Summary Rating** component. The Find An Existing Value tab - HR Views/Edits Summary Rating page (**Figure 9**) is displayed.

The screenshot shows a web interface for 'HR Views/Edits Summary Rating'. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a tab labeled 'Find An Existing Value'. Under the tab, there is a 'Search by:' label followed by a dropdown menu currently showing 'EmpID' and a text input field labeled 'begins with'. At the bottom of the search area, there are two buttons: a yellow 'Search' button and a blue 'Advanced Search' link.

Figure 9. Find An Existing Value tab - HR Views/Edits Summary Rating page

4. Complete the fields as follows:

Search By Select the applicable data from the drop-down list. Valid values are: **EmplID** and **Review Period From**.

Begins With Enter the data that corresponds to the search criteria.

5. Click **Search**. The Summary Rating tab - HR Views/Edits Summary Rating page (**Figure 10**) is displayed.

OR

Click **Clear** to clear the entry on the window. Another entry can be made at this time.

Figure 10. Summary Rating tab - HR Views/Edits Summary Rating page

- Click the **Elements and Standards** tab. The Elements and Standards tab - HR Views/Edits Summary Rating page (Figure 11) is displayed.

Figure 11. Elements And Standards tab - HR Views/Edits Summary Rating page

- Click **Save**. At this point, the following options are available:

| Step | Definition |
|-------------------------------|---|
| Click Return To Search | To search for another performance plan. |
| Click Previous Tab | To view the previous tab. |
| Click Notify | To notify a person in the workflow that the transaction is in their worklist. |

075 Performance Appraisal

The 075 Performance Appraisal component is used by HR to enter historical ratings and to enter performance ratings for employees in grades higher than GS1–13. The ratings are entered and transmitted to NFC.

HR must enter the following information on the page. Once the information is saved on the page, the transaction will be picked up by the interface and sent to NFC.

Appraisal transactions are sent to the mainframe and are run through the PINE process for editing. Transactions that pass the PINE edits are applied to the Payroll/Personnel database and sent to *EmpowHR*. The **Transaction Status** on the Performance Appraisal transaction will reflect **Applied**. Transactions that reject to suspense with errors, will reflect **Not Applied** with an error number and message. If the error is invalid, a user is able to enter an **Override Code** that tells PINE to let the document pass with the error, thereby forcing the

document to apply. The **Override Code** field  and description is located on the *Manage Performance > 075 Performance Appraisal > Performance Appraisal* page. If the error is valid, make the modification(s) to the rejected personnel document, click **Save**. The **Transaction Status** will change to **NFC Ready**.

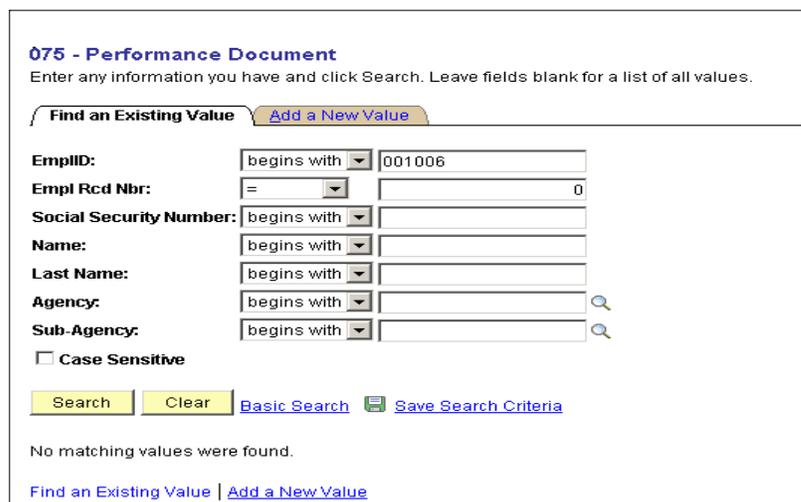
This section contains the following topic:

[Viewing/Editing 075 Performance Appraisal Data](#)

Viewing/Editing 075 Performance Appraisal Data

To view or editing 075 Performance Appraisal data:

1. Select the *Manage Performance* menu group.
2. Select the *Use* menu.
3. Select the *075 Performance Appraisal* component. The Find An Existing Value tab - 075 - Performance Document page (**Figure 12**) is displayed.



075 - Performance Document
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

EmpID: begins with 001006
Empl Rcd Nbr: = 0
Social Security Number: begins with
Name: begins with
Last Name: begins with
Agency: begins with
Sub-Agency: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

Figure 12. Find An Existing Value tab - 075 - Performance Document page

4. Complete the fields as follows:

- | | |
|-------------------------------|--|
| EmplID | Enter the employee ID. |
| Empl Rcd Nbr | Enter the number of the employee record. |
| Social Security Number | Enter the full social security number (9 positions). |
| Name | Enter the first name of the employee. |
| Last Name | Enter the last name of the employee. |
| Agency | Enter the agency of the employee. |
| Sub-Agency | Enter the sub agency for the employee. |
| Case Sensitive | Click this field if the information is case sensitive. |

5. Click **Search**. The 075 – Performance Document page (**Figure 14**) is displayed.

OR

Click **Clear** to clear the entry on the page. Another entry can be made at this time.

OR

6. Click the **Add a New Value** tab. The Add a New Value tab - 075 Performance Document page (**Figure 13**) is displayed.

075 - Performance Document

Find an Existing Value | Add a New Value

EmplID:

Empl Rcd Nbr:

Review Period From:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Figure 13. Add A New Value tab - 075-Performance Document page

7. Complete the fields as follows:

- | | |
|---------------------|-----------------------------------|
| EmplID | Enter the employee ID. |
| Empl Rcd Nbr | Enter the employee record number. |

Review Period From Enter the date the review started or select a date from the calendar icon.

8. Click **Add**. The 075 - Performance Document page (**Figure 14**) is displayed.

Stevens Irizarry, Greisha EmpID: 001006 Rcd# 0
Performance Appraisal Find | View All First 1 of 1 Last
Entry Date: 05/09/2008
User ID: CAMSBD Transaction Status: InProgress
Appraisal Period
Review From Date: 05/13/2008 Review Thru Date: 09/30/2008
Appraisal Rating
Rating Scale: []
Review Rating: []
Pay Period Number: []
Pay Period Year: []
Save Notify Add Correct History

Figure 14. 075-Performance Document window

9. Complete the fields as follows:

EmpID This field is populated with the employee ID.

Name This field is populated with the name of the employee from the EmpID.

Rcd# This field is populated with the record number of the transaction.

User ID This field is populated with the the user's ID.

Transaction Status This field is populated with the status of the transaction. The transaction status changes when the transaction is saved.

Review From Date Enter the date the review started.

Review Thru Date Enter the date the review ended.

Rating Scale Enter the applicable rating scale or select from the icon.

Review Rating Enter the applicable review rating or select from the icon.

Pay Period Number Enter the pay period number.

Pay Period Year Enter the pay period year.

10. Click **Save**.

OR

Click **Notify** to notify a person in the workflow that the transaction is in their worklist.

Performance Deletion

This option allows HR to delete an existing Performance Plan, Progress Review and/or Summary Rating.

This section contains information on the following topics:

[Existing Performance Plan](#)

[Existing Progress Review](#)

[Existing Summary Rating](#)

Existing Performance Plan

This section contains information on the following topic:

[Deleting Existing Performance Plan Data](#)

Deleting Existing Performance Plan Data

To delete Existing Performance Plan data:

1. Select the **Manage Performance** menu group.
2. Select the **Use** menu.
3. Select the **Performance Deletion** component. The Performance Deletion page (**Figure 15**) is displayed.

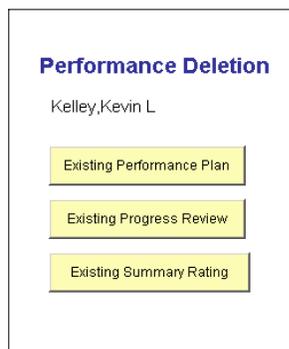


Figure 15. Performance Deletion page

4. Click **Existing Performance Plan**. The Find An Existing Value tab - HR Performance Plan Deletion page (**Figure 16**) is displayed.

HR Performance Plan Deletion
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: EmplID begins with

Search Advanced Search

Figure 16. Find An Existing Value tab - HR Performance Plan Deletion page

5. Complete the fields as follows:

Search By Select data from the drop-down list. Valid values are **EmplID** and **Review Period From**.

Begins with Enter the data that corresponds to the Search By value.

6. Click **Search**. The applicable information is displayed.
7. Select the Performance Plan intended to be deleted. The HR Performance Plan Deletion page (**Figure 17**) is displayed.

Sievens Irizarry, Greisha EmplID: 001006

Performance Plan Start Date: 10/01/2007
Performance Plan End Date: 09/30/2008
Next Performance Plan By: 10/01/2008 Rating Scale: H 5 Tier Performance

Employment info when plan was established

Agency: AG FA Farm Service Agency
Department: 900262 SERVICE CENTER Position: 90118770
Job Code: 027397 Loan Specialist (Agr) Pay Plan: GS 1165 11

Employee Viewed/Discussed Plan
Last Updated Date

Manager Finalized Plan
Last Updated Date 11/02/2007

Delete

Figure 17. HR Performance Plan Deletion page

8. Click **Delete**. The Delete Confirmation page (**Figure 18**) is displayed.

Delete Confirmation

Are you sure you want to delete Existing Performance Plan(2007-10-01)?

Yes - Delete No - Do Not Delete

Figure 18. Delete Confirmation page

9. Click **Yes - Delete**. The selected Performance Plan is deleted.

OR

Click **No - Do Not Delete**. The action is canceled.

Existing Progress Review

This section contains information on the following topic:

[Deleting Existing Progress Review Data](#)

Deleting Existing Progress Review Data

To delete existing Progress Review data:

1. Select the **Manage Performance** menu group.
2. Select the **Use** menu.
3. Select the **Performance Deletion** component. The Performance Deletion page (**Figure 15**) is displayed.
4. Click **Existing Progress Review**. The Find An Existing Value tab - HR Progress Review Deletion page (**Figure 19**) is displayed.



The screenshot shows a web interface titled "HR Progress Review Deletion". Below the title is a subtitle: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a tab labeled "Find an Existing Value". Below the tab, there is a "Search by:" label followed by a dropdown menu currently showing "EmpID" and a "begins with:" label followed by a text input field. At the bottom left, there is a yellow "Search" button, and at the bottom right, there is a blue link labeled "Advanced Search".

Figure 19. Find An Existing Value tab - HR Progress Review Deletion page

5. Complete the fields as follows:

| | |
|--------------------|--|
| Search By | Select data from the drop-down list. Valid values are EmpID and Review Period From . |
| Begins with | Enter the data that corresponds to the Search By value. |
6. Click **Search**. The applicable information is displayed.
7. Select the Progress Review to be deleted. The HR Progress Review Deletion page (**Figure 20**) is displayed.

| | | | |
|--|--|---------------------------|--|
| Stevens Irizarry,Greisha | | EmpID: | 001006 |
| Performance Plan Start Date: | 10/01/2004 | Next Performance Plan By: | 10/01/2005 |
| Performance Plan End Date: | 09/30/2005 | Perf Plan Reviewed Date: | 03/01/2005 |
| Review Type: | Performance | Overall Rating: | |
| Employment Info when plan was established | | | |
| Rating Scale: | A Pass/Fail System | Dept: | 900262 SERVICE CENTER |
| Agency: | AG FA FSA | Position: | 90118770 Pay Plan: GS 1165 11 |
| Job Code: | 027397 Loan Specist (Agri) | | |
| Reviewer Id: | 001010 Bracht,Leon E | | |
| Eval Type: | Supervisor | | |
| Reviewer Comments: | 2005-03-01 - Work assigned at at the County office level is completed in a satisfactory manner. - LB | Employee Comment: | 2007-04-06 - 2005-03-15 - I always try to do the most and the best I can between The Consent |
| 03/15/2005 | <input checked="" type="checkbox"/> Employee Viewed/Discussed Rating | | |
| Delete | | | |

Figure 20. HR Progress Review Deletion page

8. Click **Delete**. The Delete Confirmation page (Figure 21) is displayed.

| | |
|----------------------------|---|
| Delete Confirmation | |
| ? | Are you sure you want to delete Existing Progress Review(2005-03-01)? |
| Yes - Delete | No - Do Not Delete |

Figure 21. Delete Confirmation page

9. Click **Yes - Delete**. The selected Progress Review is deleted.

OR

Click **No - Do Not Delete**. The action is canceled.

Existing Summary Rating

This section contains information on the following topic:

[Deleting Existing Summary Rating Data](#)

Deleting Existing Summary Rating Data

To delete Existing Summary Rating data:

1. Select the **Manage Performance** menu group.
2. Select the **Use** menu.
3. Select the **Performance Deletion** component. The Performance Deletion page (Figure 15) is displayed.
4. Click **Existing Summary Rating**. The Find An Existing Value tab - HR Summary Rating Deletion page (Figure 22) is displayed.

9. Click **Yes - Delete**. The selected Summary Rating is deleted.

OR

Click **No - Do Not Delete**. The action is canceled.

Inquire

The Human Resources Staff can run queries to determine the status of performance documents. HR can inquire on the Supervisor (Reports To), Name, Agency, Sub-agency and Personnel Office Identifier (POI).

This section contains information on the following topics:

[Missing Performance Plans](#)

[Late Performance Plans](#)

[Missing Appraisals](#)

[Late Appraisals](#)

Missing Performance Plans

This section contains information on the following topic:

[Inquiring Missing Performance Plan Data](#)

Inquiring Missing Performance Plan Data

This option allows HR to inquire on missing performance plans.

To inquire Missing Performance Plan Data:

1. Select the **Manage Performance** menu group.
2. Select the **Inquire** menu
3. Select the **Missing Performance Plans** component. The Missing Performance Plans page (**Figure 25**) is displayed.

Missing Performance Plans

Start Date: End Date:

Agency: Sub-Agency: Personnel Office ID:

Select All Supervisor

OR

Supervisor Id:

| Supervisor Name | EmpID | Employee | Title | Sub-Agency |
|-----------------|-------|----------|-------|------------|
| | | | | |

Customize | Find | First | 1 of 1 | Last

Figure 25. Missing Performance Plans page

4. Complete the fields as follows:

Start Date

Enter the start date of the missing performance plan or select a date from the calendar icon.

| | |
|------------------------------|---|
| End Date | Enter the end date of the missing performance plan or select a date from the calendar icon. |
| Agency | Enter the two position alpha agency code. |
| Sub-Agency | Enter the sub agency. |
| Personnel Office ID | Enter the POI or select data by clicking on the search icon. |
| Select All Supervisor | Check this box if you want to view all missing performance plans for all supervisors for the selected criteria. |
| Supervisor ID | Enter a specific supervisor Id or select data by clicking on the search icon. |

A list of missing performance plans will display for the criteria entered.

Late Performance Plans

This section contains the following topic:

[Late Performance Plan Data](#)

Late Performance Plan Data

To inquire Late Performance Plan data:

1. Select the **Manage Performance** menu group.
2. Select the **Inquire** menu.
3. Select the **Late Performance Plans** component. The Late Performance Plans page (**Figure 26**) is displayed.

The screenshot shows the 'Late Performance Plans' page with the following search filters:

- Start Date: [] []
- End Date: [] []
- Agency: [AO] []
- Sub Agency: [] []
- Personnel Office ID: [] []
- Select all Supervisor:
- OR
- Supervisor Id: [] []

Below the filters is a table header with the following columns:

| Supervisor | EmailID | Employee | Title | Plan Start | Finalized Date |
|------------|---------|----------|-------|------------|----------------|
|------------|---------|----------|-------|------------|----------------|

Figure 26. Late Performance Plans page

4. Complete the fields as follows:

| | |
|------------------------------|--|
| Start Date | Enter the start date of the late performance plan or select a date from the calendar icon. |
| End Date | Enter the end date of the late performance plan or select a date from the calendar icon. |
| Agency | Enter the two position alpha agency code. |
| Sub-Agency | Enter the sub agency. |
| Personnel Office ID | Enter the POI or select data by clicking on the search icon. |
| Select All Supervisor | Check this box if you want to view all late performance plans for all supervisors for the selected criteria. |
| Supervisor ID | Enter a specific supervisor Id or select data by clicking on the search icon. |

A list of missing appraisals will display for the criteria entered.

Missing Appraisals

This section contains the following topic:

[Missing Appraisals Data](#)

Missing Appraisals Data

This option allows HR to inquire on missing appraisals.

To inquire Missing Appraisals data:

1. Select the **Manage Performance** menu group.
2. Select the **Inquire** menu.
3. Select the **Missing Appraisals** component. The Missing Performance Appraisals page (**Figure 27**) is displayed.

Figure 27. Missing Performance Appraisals page

4. Complete the fields as follows:

- | | |
|------------------------------|--|
| Start Date | Enter the start date of the missing performance appraisals or select a date from the calendar icon. |
| End Date | Enter the end date of the late missing performance appraisals or select a date from the calendar icon. |
| Agency | Enter the two position alpha agency code. |
| Sub-Agency | Enter the sub agency. |
| Personnel Office ID | Enter the POI or select data by clicking on the search icon. |
| Select All Supervisor | Check this box if you want to view all missing performance appraisals for all supervisors for the selected criteria. |
| Supervisor ID | Enter a specific supervisor Id or select data by clicking on the search icon. |

A list of missing appraisals will display for the criteria entered.

Late Appraisals

This section contains the following topic:

[Late Appraisals Data](#)

Late Appraisals Data

To inquire Late Appraisals data:

1. Select the **Manage Performance** menu group.

2. Select the **Inquire** menu.
3. Select the **Late Appraisals** component. The Late Performance Appraisals page (**Figure 28**) is displayed.

The screenshot shows the 'Late Performance Appraisals' interface. At the top, there are search filters: 'Start Date' and 'End Date' with calendar icons; 'Agency' with a dropdown menu showing 'AG'; 'Sub-Agency' with a dropdown menu; and 'Personnel Office ID' with a search icon. Below these are checkboxes for 'Select all Supervisor' and 'OR', followed by a 'Supervisor ID' search field. At the bottom, a table is displayed with the following columns: Supervisor Name, EmpID, Employee, Title, Plan Start, Plan End, and Reviewed Date. The table has a blue header and a yellow body.

Figure 28. Late Performance Appraisals page

4. Complete the fields as follows:

- | | |
|------------------------------|---|
| Start Date | Enter the start date of the late performance appraisals or select a date from the calendar icon. |
| End Date | Enter the end date of the late performance appraisals or select a date from the calendar icon. |
| Agency | Enter the two position alpha agency code. |
| Sub-Agency | Enter the sub agency. |
| Personnel Office ID | Enter the POI or select data by clicking on the search icon. |
| Select All Supervisor | Check this box if you want to view all late performance appraisals for all supervisors for the selected criteria. |
| Supervisor ID | Enter a specific supervisor Id or select data by clicking on the search icon. |

A list of late performance appraisals will display for the criteria entered.

Setup

HR Personnel can access the Setup tables for the Performance module through the Setup item under Manage Performance. HR Personnel can access Elements and Standards, elements by POI, and Review Rating Module.

This section contains information on the following topics:

[Elements And Standards](#)

[Elements By POI](#)

[Review Rating Model](#)

Elements And Standards

Elements and Standards is used to setup and edit the elements and standards used on performance plans.

This section contains the following topic:

[Setting Up/Edit Elements And Standards Data](#)

Setting Up/Edit Elements And Standards Data

To setup and edit Elements And Standards data:

1. Select the **Manage Performance** menu group.
2. Select the **Setup** menu.
3. Select the **Elements And Standards** component. The Find An Existing Value tab - Elements And Standards page (**Figure 29**) is displayed.

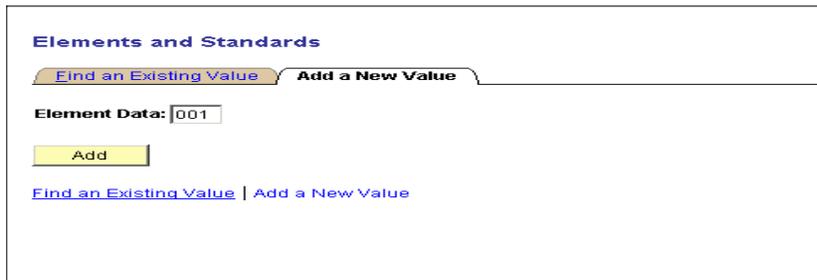


The screenshot shows the 'Elements and Standards' page. At the top, it says 'Elements and Standards' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' (which is selected) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a search bar with the text 'Search by: Element Data begins with' and a search button. There is also a link for 'Advanced Search' and another set of links for 'Find an Existing Value' and 'Add a New Value' at the bottom.

Figure 29. Find An Existing Value tab - Elements And Standards page

4. Complete the fields as follows:
Search By: Element Data Begins With Enter the Element Data.
5. Click **Search**. The Elements And Standards tab - Elements And Standards page (**Figure 31**) is displayed.

6. Select the **Add a New Value** tab at the top of the window. The Add A New Value tab - Elements And Standards page (**Figure 30**) is displayed.



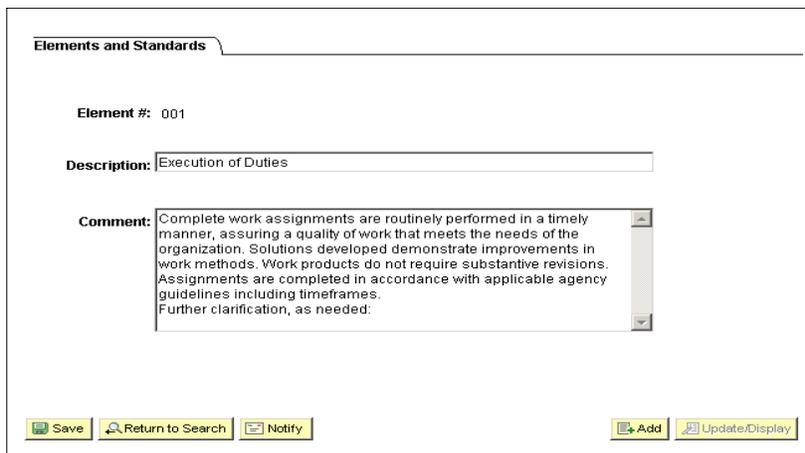
The screenshot shows a web interface titled "Elements and Standards". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value", with the latter being the active tab. Below the tabs, there is a label "Element Data:" followed by a text input field containing the value "001". Underneath the input field is a yellow button labeled "Add". At the bottom of the form area, there are two blue links: "Find an Existing Value" and "Add a New Value".

Figure 30. Add A New Value tab - Elements And Standards page

7. Complete the fields as follows:

Element Data Enter the Element Data.

8. Click **Add**. The Elements And Standards tab - Elements And Standards page (**Figure 31**) is displayed.



The screenshot shows the "Elements and Standards" window with the "Add" tab active. The "Element #" field is populated with "001". The "Description" field contains the text "Execution of Duties". The "Comment" field is a text area containing a detailed paragraph: "Complete work assignments are routinely performed in a timely manner, assuring a quality of work that meets the needs of the organization. Solutions developed demonstrate improvements in work methods. Work products do not require substantive revisions. Assignments are completed in accordance with applicable agency guidelines including timeframes. Further clarification, as needed." At the bottom of the window, there are five buttons: "Save", "Return to Search", "Notify", "Add", and "Update/Display".

Figure 31. Elements And Standards window

9. Complete the fields as follows:

Element # This number is populated from the search criteria entered.

Description This field is the description of the element. Enter or edit the applicable information.

Comment This field is how the element should be performed. Enter or edit the applicable information.

10. Click **Save**. Complete one of the following steps, as applicable:

| Step | Description |
|-------------------------------|---|
| Click Return To Search | To search for additional Elements and Standards. |
| Click Notify | To notify a person in the workflow that the transaction is in their worklist. |
| Click Add | To add additional Elements and Standards. |
| Click Update/Display | To update the page. |

Elements By POI

Elements By POI is used to specify which elements are used by each POI.

This section contains the following topic:

[Setting Up/Edit Elements By POI Data](#)

Setting Up/Edit Elements By POI Data

To setup Elements By POI:

1. Select the **Manage Performance** menu group.
2. Select the **Setup** menu.
3. Select the **Elements By POI** component. The Find An Existing Value tab - Elements by POI page (**Figure 32**) is displayed.

Elements by POI
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: Personnel Office ID begins with

Search [Advanced Search](#)

Figure 32. Find An Existing Value tab - Elements By POI page

4. Complete the fields as follows:

Search By Select the applicable search criteria. The valid values are: **Personnel Office ID** and **Description**.

Begins With Enter the applicable information that corresponds to the search criteria.

5. Click **Search**. The Elements By POI tab - Elements By POI page (**Figure 33**) is displayed.

The screenshot shows a web application interface titled "Elements by POI". At the top, there are two fields: "Sub-Agency: 90 Office of Chief Financial Offr" and "Personnel Office ID: 5317". Below these is a table with a blue header "POI Elements". The table has a search bar with "001" and a magnifying glass icon, and a search result "Execution of Duties". The table also has "Find | View All" and "First 1 of 1 Last" navigation options. At the bottom of the page, there are three buttons: "Save", "Return to Search", and "Notify".

Figure 33. Elements By POI tab - Elements By POI page

6. Complete the fields as follows:

Sub-Agency This field is populated based on the POI entered.

Personnel Office ID This field is populated based on the search criteria entered.

Element Data Enter the element number or select data by clicking the search icon.

7. Click **Save**.

OR

Click **Return To Search** to search for additional Elements By POI.

OR

Click **Notify** to notify a person in the workflow that the transaction is in their worklist.

Manage Performance Reports

The Human Resources Staff can run queries to determine the status of performance documents. HR can report on the Supervisor Name or Agency, Sub-Agency and Personnel Office Identifier (POI).

This section contains information on the following topics:

- [Missing Performance Plans](#)
- [Late Performance Plans](#)
- [Missing Appraisals](#)
- [Late Appraisals](#)

Missing Performance Plans

This option allows HR to report on missing performance plans.

To report on Missing Performance Plans:

1. Select the **Manage Performance** menu group.
2. Select the **Report** menu.
3. Select the **Missing Performance Plans** component. The Find An Existing Value tab - Missing Performance Plans page (**Figure 34**) is displayed.

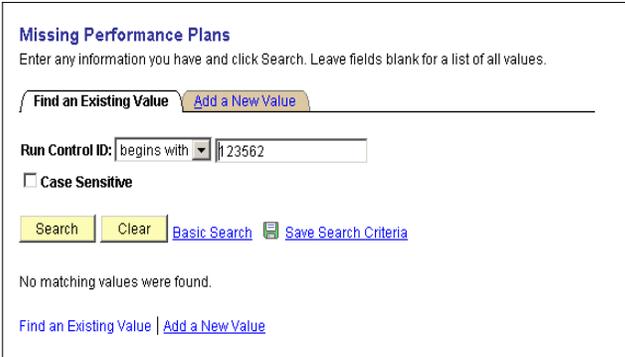


Figure 34. Find An Existing Value tab - Missing Performance Plans page

4. Complete the fields as follows:

Run Control ID

Select data from the drop-down list. Valid values are **Begins With** (The data starts with a specific character.), **Contains** (The data contains specific characters.), **=** (The data is equal to.), **Not =** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **Between** (The data is within a range of two values.), and **In** (The data is within a field.). Enter the applicable data based on the search criteria selected.

Case Sensitive Click this field if the search criteria is case sensitive.

5. Click **Search**. The Missing Plan tab - Missing Performance Plans page (**Figure 36**) is displayed.

OR

Click **Clear** to clear the entry on the page. Another entry can be made at this time.

OR

Click the **Add a New Value** tab. The Add A New Value tab - Missing Performance Plans page (**Figure 35**) is displayed.

The screenshot shows a web interface titled "Missing Performance Plans". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value", with the latter being the active tab. Below the tabs, there is a text input field labeled "Run Control ID:". Underneath the field is a yellow "Add" button. At the bottom of the form, there are two links: "Find an Existing Value" and "Add a New Value".

Figure 35. Add A New Value tab - Missing Performance Plans page

6. Complete the fields as follows:

Run Control ID Enter the control ID.

7. Click **Add**. The Missing Plan tab - Missing Performance Plans page (**Figure 36**) is displayed.

The screenshot shows a web interface titled "Missing Plan" with the subtitle "Report of Missing Performance Plans". It features a "Run Control ID" field with the value "123562" and a "Language" dropdown menu set to "English". To the right of these fields are links for "Report Manager" and "Process Monitor", and a yellow "Run" button. Below this is a search box for "Supervisor Name:". An "OR" separator is followed by another search box containing "Agency:", "Sub-Agency:", and "Personnel Office ID" fields, each with a search icon. At the bottom, there are buttons for "Save", "Notify", "Add", and "Update/Display".

Figure 36. Missing Plan tab - Missing Performance Plans page

8. Complete the fields as follows:

Run Control ID This field is populated based on the search criteria entered.

Language Select the applicable language from the drop -down list. This field defaults to **English**. Valid values are as follows:

| Languages |
|------------|
| Arabic |
| Can French |
| Czech |
| Danish |
| Dutch |
| English |
| French |
| Finnish |
| German |
| Greek |
| Hebrew |
| Hungarian |
| Italian |
| Japanese |
| Korean |
| Malay |
| Norwegian |
| Polish |
| Portuguese |
| Russian |
| S. Chinese |
| Spanish |
| Swedish |
| TChinese |
| Thai |
| Turkish |

Supervisor Name Enter the name of the supervisor or select data by clicking the search icon.

OR

Agency Enter the two position alpha agency code or search data by clicking the search icon.

Sub-Agency Enter the sub agency.

Personnel Office ID Enter the POI or select data by clicking on the search icon.

- Click **Save** . At this point, the following options are available:

| Step | Definition |
|------------------------------|--|
| Click Notify | To send an e-mail to a person in the workflow. |
| Click Add | To add information to a report. |
| Click Update/Display | To update the page. |
| Click Report Manager | To access additional report options. For more information, see Report Manager . |
| Click Process Monitor | To access additional report options. For more information, see Report Manager . |

- Click **Run**. The Project Scheduler Request page (**Figure**) is displayed. For more information, see Report Manager.

Late Performance Plans

This option allows HR to inquire on late performance plans.

To inquire on Late Performance Plans:

- Select the **Manage Performance** menu group.
- Select the **Report** menu.
- Select the **Late Performance Plans** component. The Find An Existing Value tab - Late Performance Plans page (**Figure 37**) is displayed.

The screenshot shows the 'Late Performance Plans' interface. At the top, it says 'Late Performance Plans' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a tabbed interface with 'Find an Existing Value' selected and 'Add a New Value' as an alternative. A search input field contains 'begins with' in a dropdown menu. There is a checkbox for 'Case Sensitive'. At the bottom of the search area are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search area, there are links for 'Find an Existing Value' and 'Add a New Value'.

Figure 37. Find An Existing Value tab - Late Performance Plans page

- Complete the fields as follows:

Run Control ID Enter the Run Control ID.

Case Sensitive Click this field if the search criteria is case sensitive.

- Click **Search**. The Late Performance Plan page (**Figure 39**) is displayed

OR

Click **Clear** to clear the entry on the page. Another entry can be made at this time.

OR

Click the **Add a New Value** tab. The Add A New Value tab - Late Performance Plans page (**Figure 38**) is displayed.

Figure 38. Add A New Value tab - Late Performance Plans page

- Complete the fields as follows:

Run Control ID Enter the control ID.

- Click **Add**. The Late Performance Plans page (**Figure 39**) is displayed.

Figure 39. Late Performance Plans page

- Complete the fields as follows:

Language Select the applicable language from the drop -down list. This field defaults to **English**. Valid values are as follows:

| Languages |
|------------|
| Arabic |
| Can French |

| Languages |
|------------|
| Czech |
| Danish |
| Dutch |
| English |
| French |
| Finnish |
| German |
| Greek |
| Hebrew |
| Hungarian |
| Italian |
| Japanese |
| Korean |
| Malay |
| Norwegian |
| Polish |
| Portuguese |
| Russian |
| S. Chinese |
| Spanish |
| Swedish |
| TChinese |
| Thai |
| Turkish |

Supervisor Name Enter the name of the supervisor or select data by clicking the search icon.

OR

Agency Enter the two position alpha agency code or search data by clicking the search icon.

Sub-Agency Enter the sub agency.

Personnel Office ID Enter the POI or select data by clicking on the search icon.

9. Click **Save** . At this point, the following options are available:

| Step | Definition |
|-----------------------------|--|
| Click Notify | To send an e-mail to a person in the workflow. |
| Click Add | To add information to a report. |
| Click Update/Display | To update the page. |

| Step | Definition |
|------------------------------|---|
| Click Report Manager | To access additional report options. Form more information, see Report Manager . |
| Click Process Monitor | For more information, see Report Manager . |

- Click **Run**. The Project Scheduler Request page (**Figure**) is displayed. For more information, see Report Manager.

Missing Performance Appraisals

This option allows HR to report on missing performance appraisals.

To report on Missing Performance Appraisals:

- Select the **Manage Performance** menu group.
- Select the **Report** menu.
- Select the **Missing Performance Appraisal** component. The Find An Existing Value tab - Missing Performance Appraisal page (**Figure**) is displayed.

Figure 40. Find An Existing Value tab - Missing Performance Appraisal page

- Complete the fields as follows:

Run Control ID

Click the down arrow to choose a search criteria. Valid values are **Begins With** (The data starts with a specific character.), **Contains** (The data contains specific characters.), **=** (The data is equal to.), **Not =** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **Between** (The data is within a range of two values.), and **In** (The data is within a field.). Enter the applicable data based on the search criteria selected.

Case Sensitive

Click this field if the search criteria is case sensitive.

5. Click **Search**. The Missing Review tab - Missing Performance Appraisal page(Figure 42) is displayed.

OR

Click **Clear** to clear the entry on the page. Another entry can be made at this time.

OR

Click the **Add a New Value** tab. The Add A New Value tab - Missing Performance Appraisal page (Figure 41) is displayed.

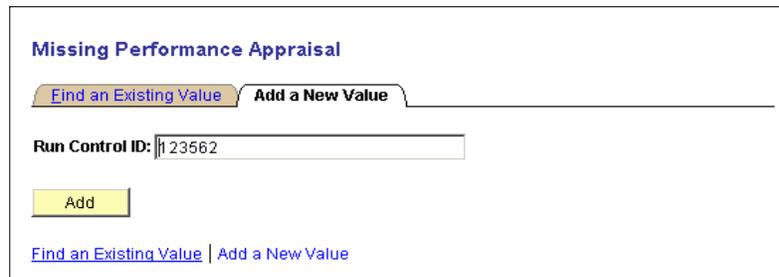


Figure 41. Add A New Value tab - Missing Performance Appraisal page

6. Complete the fields as follows:

Run Control ID Enter the control ID.

7. Click **Add**. The Missing Review tab - Missing Performance Appraisal page(Figure 42) is displayed.

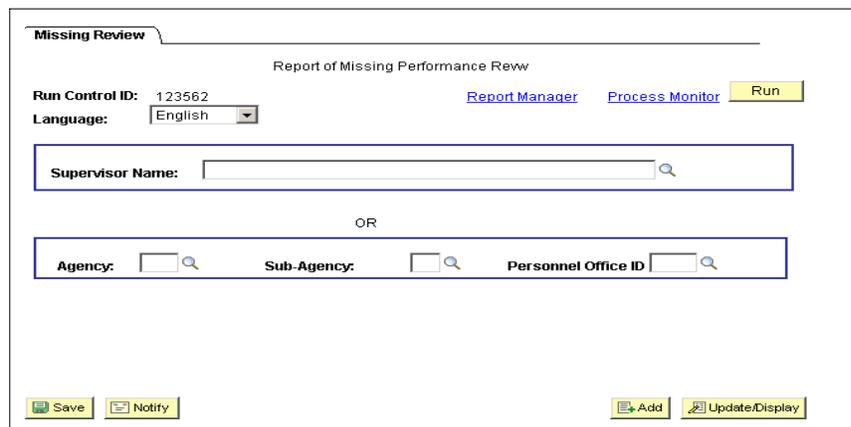


Figure 42. Missing Review tab - Missing Performance Review page

8. Complete the fields as follows:

Run Control ID This field is populated with the search criteria entered.

Language Select the applicable language from the drop -down list. This field defaults to **English**. Valid values are as follows:

| Languages |
|------------|
| Arabic |
| Can French |
| Czech |
| Danish |
| Dutch |
| English |
| French |
| Finnish |
| German |
| Greek |
| Hebrew |
| Hungarian |
| Italian |
| Japanese |
| Korean |
| Malay |
| Norwegian |
| Polish |
| Portuguese |
| Russian |
| S. Chinese |
| Spanish |
| Swedish |
| TChinese |
| Thai |
| Turkish |

Supervisor Name Enter the name of the supervisor or select data by clicking the search icon.

OR

Agency Enter the two position alpha agency code or search data by clicking the search icon.

Sub-Agency Enter the sub agency

Personnel Office ID Enter the POI or select data by clicking on the search icon.

9. Click **Save** . At this point, the following options are available:

| Step | Definition |
|---------------------|--|
| Click Notify | To send an e-mail to a person in the workflow. |
| Click Add | To add information to a report. |

| Step | Definition |
|------------------------------|--|
| Click Update/Display | To update the page. |
| Click Report Manager | To access more report options. For more information, see Report Manager . |
| Click Process Monitor | For more information, see Report Manager . |

10. Click **Run**. The Project Scheduler Request page (**Figure**) is displayed. For more information, see Report Manager.

Late Performance Appraisals

This option allows HR to report on late performance appraisals.

To inquire on Late Performance Appraisals:

1. Select the **Manage Performance** menu group.
2. Select the **Report** menu.
3. Select the **Late Performance Appraisal** component. The Find An Existing Value tab - Late Performance Appraisal page (**Figure 43**) is displayed.

Late Performance Appraisal
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Run Control ID: begins with []

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

Figure 43. Find An Existing Value tab - Late Performance Appraisal page

4. Complete the fields as follows:

Run Control ID

Select a search criteria from the drop-down list. Valid values are **Begins With** (The data starts with a specific character.), **Contains** (The data contains specific characters.), **=** (The data is equal to.), **Not =** (The data is not equal to.), **<** (The data is less than.), **<=** (The data is less than or equal to.), **>** (The data is greater than.), **>=** (The data is greater than or equal to.), **Between** (The data is within a range of two values.), and **In** (The data is within a field.). Enter the applicable data based on the search criteria selected.

Case Sensitive

Click this field if the search criteria is case sensitive.

5. Click **Search**. The Late Review tab - Late Performance Review page (**Figure 45**) is displayed.

OR

Click **Clear** to clear the entry on the page. Another entry can be made at this time.

OR

Click the **Add a New Value** tab. The Add A New Value tab - Late Performance Appraisal page (**Figure 44**) is displayed.

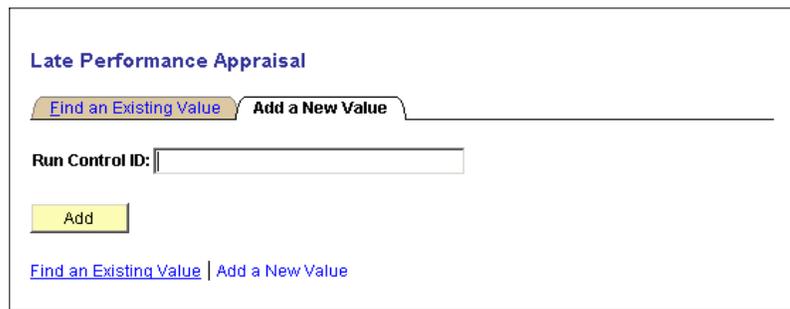


Figure 44. Add A New Value tab - Late Performance Appraisal page

6. Complete the field as follows:

Run Control ID Enter the control ID.

7. Click **Add**. The Late Review tab - Late Performance Review page (**Figure 45**) is displayed.

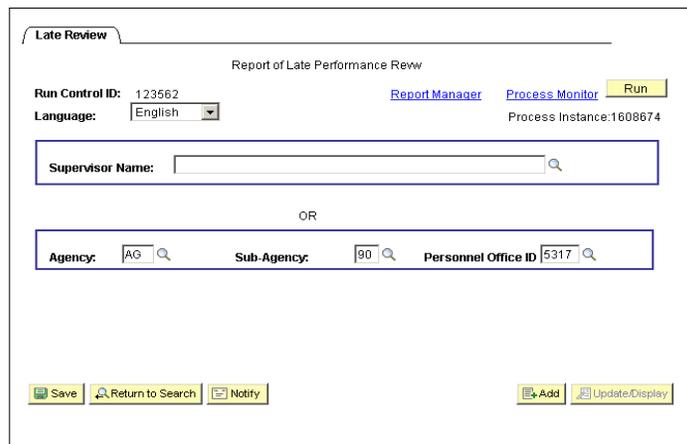


Figure 45. Late Review tab - Late Performance Review page

8. Complete the fields as follows:

Run Control ID This field is populated with the search criteria entered.

Language Select the applicable language from the drop -down list. This field defaults to **English**. Valid values are as follows:

| Language Valid Values |
|-----------------------|
| Arabic |
| Can French |
| Czech |
| Danish |
| Dutch |
| English |
| French |
| Finnish |
| German |
| Greek |
| Hebrew |
| Hungarian |
| Italian |
| Japanese |
| Korean |
| Malay |
| Norwegian |
| Polish |
| Portuguese |
| Russian |
| S Chinese |
| Spanish |
| Swedish |
| TChinese |
| Thai |
| Turkish |

Supervisor Name Enter the name of the supervisor or select data by clicking the search icon.

OR

Agency Enter the two position alpha agency code or search data by clicking the search icon.

Sub-Agency Enter the sub agency.

Personnel Office ID Enter the POI or select data by clicking on the search icon.

9. Click **Save** . At this point, the following options are available:

| Step | Definition |
|---------------------|--|
| Click Notify | To send an e-mail to a person in the workflow. |
| Click Add | To add information to a report. |

| Step | Definition |
|------------------------------|---|
| Update/Display | To update the page. |
| Report Manager | To access more report option. For more information, see Report Manager . |
| Click Process Monitor | For more information, see Report Manager . |

- Click **Run**. The Project Scheduler Request page (**Figure 46**) is displayed. For more information, see Report Manager.

Figure 46. Project Scheduler Request page

Review Rating Model

The Review Rating Model is used to setup the ratings used on the performance documents..

To setup a Review Rating Model:

- Select the **Manage Performance** menu group.
- Select the **Setup** menu.
- Select the **Review Rating Model** component. The Find An Existing Value tab - Review Rating Model page (**Figure 47**) is displayed.

Figure 47. Find An Existing Value tab - Review Rating Model page

- Complete the fields as follows:
- Enter the applicable information.

6. Click **Search**. The Review Rating Model page is displayed.

OR

7. Select the **Add a New Value** tab. The Add A New Value tab - Review Rating Model page (**Figure**) is displayed.



Figure 48. Add A New Value tab - Review Rating Model page

8. Complete the fields as follows:

Rating Model

Rating Model: A

Rating Model Description: Find | View All | First 1 of 3 | Last

*Effective Date: 04/01/2005 Status: Active

*Description: Pass/Fail System

Short Description: Pattern A Review Band: OPM Pattern: Lev 1,3

Ratings: General Review Points Federal Customize | Find | First 1 of 4 | Last

| Rating | Description | Short Description | Numeric Career Strength/ Rating Development | Rating Explanation |
|--------|----------------------------|-------------------|---|--------------------|
| 1 | UNACCEPTABLE | UNACCEP | 0.00 | |
| 3 | FULLY SUCCESSFUL OR EQUIV. | FULLY SUCC | 0.00 | |
| X | NOT RATED | NOT RATED | 0.00 | |
| Z | Excluded from Coverage | Excluded | 0.00 | |

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Figure 49. Rating Model page

9. Complete the fields as follows:

Rating Model

This field is populated with the search criteria entered.

***Effective Date**

Enter the applicable date or select a date from the calendar icon.

- Status** This field defaults to **Active**. Change by selecting data from the drop-down list.
- *Description** Enter the description of the rating system.
- Short Description** Enter the short description of the rating.
- Review Band** When the **Correct History** button is selected, the review band is checked.
- OPM Pattern** Enter the applicable information or select data from the drop-down list.

10. Click the **General** tab. General page (**Figure**) is displayed.

11. Complete the fields as follows:

- *Rating** Enter the number associated with the rating
- *Description** This field defaults to **Active**. Change by selecting data from the drop-down list.
- *Description** This field is the description for the Rating number
- Numeric Rating** This field is the number rating associated with the Description.
- Career Strength/Development** Enter the applicable information or select data from the drop-down list.
- Rating Explanation** Click this icon to view or enter a rating explanation.

12. Click **Review Point** tab. The Review Point tab (**Figure 50**) is displayed.

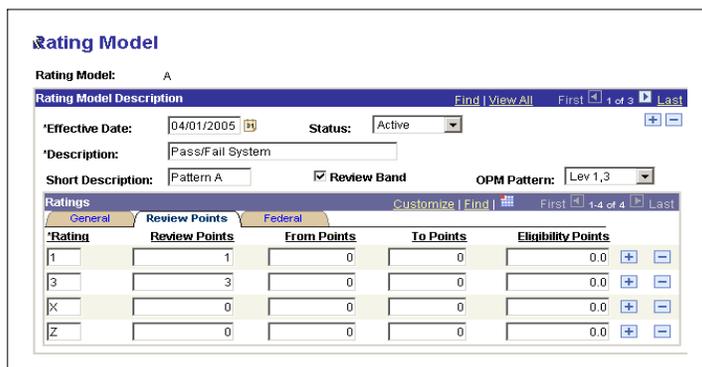


Figure 50. Review Point tab

| Step | Description |
|------------------------------|---|
| Click Add | To add an additional Review Rating Model. |
| Click Update/Display | To update the page. |
| Click Include History | To include the transaction in history. |
| Click Correct History | To correct the transaction in history. |

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