

# How do I...

**Complete Employee Activities in  
the National Guard (Title 32)  
Performance Appraisal Application  
(PAA)?**

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# How do I...Complete Activities Associated with My Performance Plan?

## Create My Performance Plan

1. Begin at the **MyBiz** website at <https://compo.dcpds.cpms.osd.mil/>
2. Log into **MyBiz**.
3. Select **NGB region**.

To access an HR/MyBiz/MyWorkplace database, select the appropriate link below

[NGB region](#) ←

4. Select **My Biz** and then **Performance Appraisal Application (PAA)** links.



Department of Defense

Navigator

|                          |  |
|--------------------------|--|
| <a href="#">My Biz</a> ← | <b>My Biz</b> <ul style="list-style-type: none"><li><a href="#">My Information</a></li><li><a href="#">Update My Information</a></li><li><a href="#">Employment Verification</a></li><li><a href="#">Performance Appraisal Application (PAA)</a> ←</li></ul> |
|--------------------------|--|

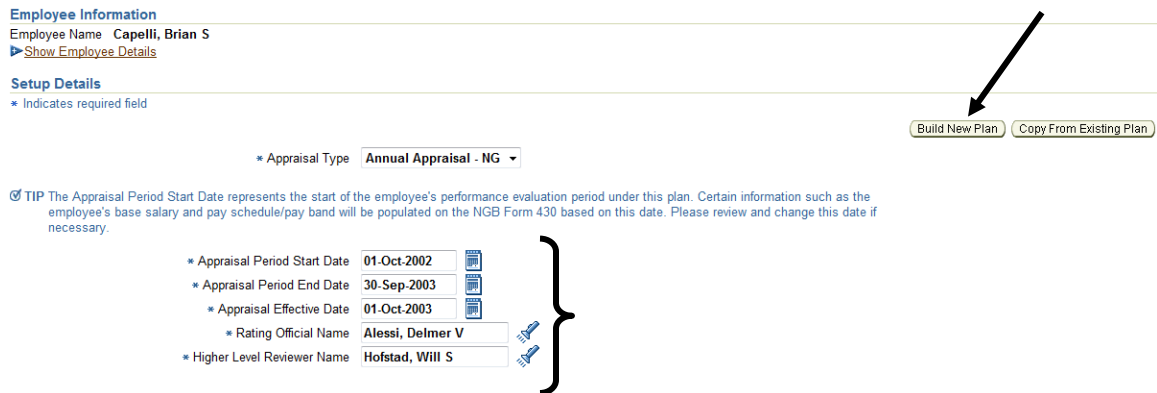
"My Biz and associated web pages are web-based tools created by the Department of Defense (DoD) as part of the Defense Civilian Personnel Data System (DCPDS) to allow DoD personnel access to and management of their personal personnel records. The DoD MyBiz and associated tools can be accessed only by authorized DoD personnel within a .mil or dodea.edu network. The DoD MyBiz tool has no association with any private or other enterprise using "MyBiz" in whole or in part as a title or logo."

5. Select **National Guard (Title 32)** from the **Create New Plan** drop-down menu.
6. Select the **Go** button.



7. Review the information and make any necessary changes to the default values.
8. Select the **Build New Plan** button or **Copy an Existing Plan**

**\*To use the Copy Existing Plan option, see Pg 7 of this guide\***




9. Select the **Mission Goals** tab.
10. Enter your Organizational, Agency, or Office goals and priorities. This is an optional tab it is not Agency Mandated, talk to your **Rating Official** for further guidance.
11. Select the **Next** button to continue.


**Employee Information**  
 Employee Name **Capelli, Brian S**  
[▶ Show Employee Details](#)

**Plan** | Reports/Forms  
 Plan Details | **Mission Goals** | Job Objectives | Approvals & Acknowledgments

**Mission Goals**  
 This screen focuses on important information regarding your organization's goals and priorities. You may type or copy and paste information into the text box or it may be populated by your Rating [Need Help?](#) Official. When done, select the 'Next' button or 'Job Objectives' Tab.

Organization's Mission Goals 

(Limit to 1400 characters) Counter 28

[◀ PREVIOUS](#) [NEXT >](#) 

12. Select the **Add Job Objective** button to create a new **Job Objective**.

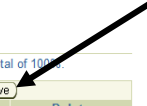
**Employee Information**  
 Employee Name **Capelli, Brian S**  
[▶ Show Employee Details](#)

**Plan** | Reports/Forms  
 Plan Details | Mission Goals | **Job Objectives** | Approvals & Acknowledgments

**Job Objectives**  
 This screen allows you to add new Objectives, update pending Objectives if you have ownership of your Performance Plan, and view approved Objectives. [Need Help?](#)

- To add a new Job Objective, select the 'Add Job Objective' button.
- To update a Job Objective, select the 'Update' button under the action column.
- **(Important:** You must have ownership of your Performance Plan to update your Job Objectives).
- All 'Approved' Job Objectives with assigned weights must equal a total of 100%.
- To view an existing Job Objective, select the 'View' button under the Action Column.

**Important:** If your Job Objective is approved, only your Rating Official may change or edit it.

 [Add Job Objective](#)

TIP Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned optional weights must equal a total of 100%.

| Details           | Number | Title | Status | Weight % (Optional) | Action | Delete |
|-------------------|--------|-------|--------|---------------------|--------|--------|
| No results found. |        |       |        |                     |        |        |

[◀ PREVIOUS](#) [NEXT >](#)

13. Enter the **Job Objective Title**.

14. Change the **Start Date** if the default value is incorrect. This date cannot be **Earlier** than the **Start Date** of the **Plan**.

15. Enter your draft **Job Objective** text.

**NOTE:** You must have a **minimum** of **2 Job Objectives!** But it is recommended to write at least **3–5 Job Objectives**.

16. Select one of the following buttons.

- Select **Save** periodically to save the **Job Objective** and continue typing.
- Select **Save and Add Another Job Objective** to save and begin writing another Job Objective.
- Select **Save and Return to Job Objectives Tab** when you are finished entering **Job Objectives**.

17. After you have completed adding Job Objectives select **Save and Return to Job Objectives Tab**.

This screen allows you to add a Job Objective.

|                       |  |
|-----------------------|--|
| Objective Number      | 1  |
| * Job Objective Title | Job Objective 1                                      |
| * Start Date          | 01-Oct-2002<br><small>(example: 20-Dec-2010)</small> |
| Job Objective Status  | PENDING  |
| Date Last Modified    | 20-Dec-2010  |

Job Objective

Employee's Description

(Limit to 1000 characters)

Counter

Save Save and Add Another Job Objective Save and Return to Job Objectives Tab

18. Select **Transfer to Rating Official** button.

NG PAA - Employee

Transfer to Rating Official Track Progress Return to Main Page

**Employee Information**  
 Employee Name Capelli, Brian S  
[Show Employee Details](#)

Plan Reports/Forms

Plan Details Mission Goals Job Objectives Approvals & Acknowledgments

**Job Objectives**  
 This screen allows you to add new Objectives, update pending Objectives if you have ownership of your Performance Plan, and view approved Objectives. [Need Help?](#)

- To add a new Job Objective, select the 'Add Job Objective' button.
- To update a Job Objective, select the 'Update' button under the action column.  
 (Important: You must have ownership of your Performance Plan to update your Job Objectives).
- All 'Approved' Job Objectives with assigned weights must equal a total of 100%.
- To view an existing Job Objective, select the 'View' button under the Action Column.

**Important:** If your Job Objective is approved, only your Rating Official may change or edit it.

**TIP** Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned optional weights must equal a total of 100%. [Add Job Objective](#)

[Show All Details](#) | [Hide All Details](#)

| Details              | Number | Title       | Status  | Weight % (Optional) | Action                 | Delete |
|----------------------|--------|-------------|---------|---------------------|------------------------|--------|
| <a href="#">Show</a> | 1      | Objective 1 | PENDING |                     | <a href="#">Update</a> |        |
| <a href="#">Show</a> | 2      | Objective 2 | PENDING |                     | <a href="#">Update</a> |        |

<PREVIOUS NEXT>

19. Type an e-mail message to your **Rating Official** indicating that you are **Transferring the Performance Plan**.

20. Select **Transfer to Rating Official with E-mail Notification**.

Employee Notification to Rating Official - Alessi, Delmer V

Cancel Transfer to Rating Official without E-mail Notification Transfer to Rating Official with E-mail Notification

**Message to Rating Official**  
 This screen provides space for you to send your Rating Official a message regarding your Performance Plan. After writing the message, select the 'Transfer to Rating Official with E-mail Notification' button to send the message.

Notice: You are about to contact Alessi, Delmer V by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail.

Cancel Transfer to Rating Official without E-mail Notification Transfer to Rating Official with E-mail Notification

**Note:** If you receive a warning message that there is no e-mail address for your **Rating Official**, you have no other option but to **Transfer to Rating Official without E-mail Notification** and then notify the **Rating Official** through other means.

21. At this point, the **Performance Plan** has been created and the **Employee** has no further action until the **Rating Official** sends it back to them for **Rating Official Changes (see Pg 8) or Acknowledge My Performance Plan (see Pg 10)**.

## Copy an Existing Plan

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Select **National Guard (Title 32)** from the **Create New Plan** drop-down menu.
3. Select the **Go** button.

4. Review the information and make any necessary changes to the default values.
5. Select the **Copy From Existing Plan** button.

6. Select an **Appraisal Effective Date** for the plan you want to copy and select the **Find** button.
7. Select the **Copy** button for the appropriate plan.

8. Now complete **Steps 9-21** starting on **Pg 4** of this document to review, change, and transfer the plan to your **Rating Official**.



## Review Rating Official changes

**Note:** This step is only used if **Rating Official** has made changes and returned the **Plan** for **Review** by the **Employee**. If **Employee** does not agree or has questions/concerns with the changes made by the **Rating Official**, contact the **Rating Official** for discussion before making additional changes.

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open an existing Performance Plan by selecting **Update** from the **Action** drop-down menu for the plan listed and select the **Go** button.

**Note:** The plan Status is **Plan in Progress**.

Appraisals of Capelli, Brian S

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action                                   |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2003           | 1248         |                    | NG   | Pending     | Plan in Progress   | Update <input type="button" value="Go"/> |

3. Review the information, select the **Next** button.

Plan Details

This screen provides information about the status of your performance plan. [Need Help?](#)

- Update your Appraisal Type and Appraisal Dates, if necessary. **Important Note:** The Appraisal Period Start Date represents the start of your performance evaluation period under this plan. Certain information such as your pay grade and step will be populated on your appraisal form based on this date. For additional guidance select the 'Need Help?' link.
- Change the Rating Official and/or Higher Level Reviewer.
- Transfer the plan to your Rating Official.

To change a Rating Official and/or Higher Level Reviewer or both, select the 'Change Rating Official and/or Higher Level Reviewer' button. When done, select the 'Next' button or the 'Mission Goals' tab.

|                             |                       |                                  |                    |
|-----------------------------|-----------------------|----------------------------------|--------------------|
| * Appraisal Type            | Annual Appraisal - NG | } Performance Plan Approval Date |                    |
| Appraisal Period Start Date | 01-Oct-2002           |                                  | Plan Last Modified |
| Appraisal Period End Date   | 30-Sep-2003           |                                  | Created By         |
| Appraisal Effective Date    | 01-Oct-2003           |                                  | Capelli, Brian S   |
| Rating Official Name        | Alessi, Delmer V      |                                  |                    |
| Higher Level Reviewer       | Hofstad, Will S       |                                  |                    |

4. Review the **Mission Goals**, select the **Next** button.

Mission Goals

This screen focuses on important information regarding your organization's goals and priorities. You may type or copy and paste information into the text box or it may be populated by your Rating Official. When done, select the 'Next' button or 'Job Objectives' Tab. [Need Help?](#)

Organization's Mission Goals

(Limit to 1400 characters) Counter 28

5. Use the **+Show** to review the **Job Objectives**.

Plan Reports/Forms

Plan Details Mission Goals **Job Objectives** Approvals & Acknowledgments

Job Objectives

This screen allows you to add new Objectives, update pending Objectives if you have ownership of your Performance Plan, and view approved Objectives. [Need Help?](#)

- To add a new Job Objective, select the 'Add Job Objective' button.
- To update a Job Objective, select the 'Update' button under the action column.
- (Important:** You must have ownership of your Performance Plan to update your Job Objectives).
- All 'Approved' Job Objectives with assigned weights must equal a total of 100%.
- To view an existing Job Objective, select the 'View' button under the Action Column.

**Important:** If your Job Objective is approved, only your Rating Official may change or edit it.

**TIP** Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned optional weights must equal a total of 100%.

Add Job Objective

| Details  | Number | Title           | Status  | Weight % (Optional) | Action                 | Delete |
|--|--------|-----------------|---------|---------------------|------------------------|--------|
| <a href="#">Hide</a>   |        | Job Objective 1 | PENDING | 30%                 | <a href="#">Update</a> |        |
| Job Objective 1<br>Employee's Description Updated by the Rating Official |        |                 |         |                     |                        |        |
| <a href="#">Show</a>   | 2      | Job Objective 2 | PENDING | 30%                 | <a href="#">Update</a> |        |
| <a href="#">Show</a>   | 3      | Job Objective 3 | PENDING | 40%                 | <a href="#">Update</a> |        |

[<PREVIOUS](#) [NEXT>](#)

6. After you have completed reviewing **Job Objectives**; select **Save and Return to Job Objectives Tab**.

7. See **Steps 18-21** starting on **Pg 6** to **Transfer to the Rating Official**.

## Acknowledge My Performance Plan

**Note:** The **Rating Official** can **Acknowledge** the **Plan** on behalf of the **Employee**, this step may not be necessary if the **Rating Official** documents for them.

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current Performance Plan by selecting **Update** from the **Action** drop-down menu and select the **Go** button.

**Note:** The PAA Status will be **Plan Approved**.

Appraisals of Capelli, Brian S

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--------|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2003           | 1248         | 02-Dec-2003        | NG   | Approved    | Plan Approved      | Update |

Records Displayed: 10

Create New Plan: --Choose a Plan Type-- [Go]

3. Select the **Approvals and Acknowledgments** tab.
4. In **Step 4: Employee - Acknowledgment**, select the **Acknowledge Receipt** button.
5. Select the **Save** button.

Plan | Interim Reviews | Annual Appraisal | Other Assessments | Reports/Forms

Plan Details | Mission Goals | Job Objectives | **Approvals & Acknowledgments**

Approvals & Acknowledgments

This screen provides information regarding the detailed status of your performance plan. [Need Help?](#)

- Select 'Show' to see detailed information about an approval (dates, method, etc.).
- If you have created this Performance Plan, select the 'Transfer to Rating Official' button once you have completed adding all Job Objectives.
- Select the 'Acknowledge Receipt' button if available.

| Details | Tasks   | Status                      | Action              |
|---------|---|-----------------------------|---------------------|
| ▶ Show  | Step 1: Rating Official - Request or Document Higher Level Review | Completed                   |                     |
| ▶ Show  | Step 2: Higher Level - Review                                     | Completed                   |                     |
| ▶ Show  | Step 3: Rating Official - Document Communication to Employee      | Completed                   |                     |
| ▶ Show  | Step 4: Employee - Acknowledgment                                 | Pending Empl Acknowledgment | Acknowledge Receipt |

<PREVIOUS

# How Do I...Complete My Interim Review?

## Create My Self-Assessment for My Interim Review

**Note:** Employee must be the **Current Owner** of the **Plan** to start the **Interim Review** process.

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current Performance Plan by selecting **Update** from the **Action** drop down menu for the plan listed and select the **Go** button.

**Note:** The PAA Status is **Plan Approved**.

Appraisals of Capelli, Brian S

Create New Plan  
--Choose a Plan Type-- [Go]

Records Displayed: 10

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action      |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|-------------|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2003           | 1248         | 02-Dec-2003        | NG   | Approved    | Plan Approved      | Update [Go] |

3. Select the **Interim Reviews** tab.
4. Select the **Create Interim Review** button.

Plan **Interim Reviews** Annual Appraisal Other Assessments Reports/Forms

**Interim Reviews**

Interim Reviews are conducted to assess your performance throughout the performance cycle. At least one Interim Review is required and is typically conducted at the mid-point of the cycle. From [Need Help?](#) this screen you can create an Interim Review, update an Interim Review that has not been approved, and view a completed Interim Review.

- To create an Interim Review, select the 'Create Interim Review' button.
- To complete other actions described above, select the button under the Action column.

**TIP** Interim Reviews are a review of an employee's performance which typically occurs midway through the performance cycle. (Note: Not a closeout Assessment or Annual Appraisal)

Create Interim Review

| Number            | Created By | Creation Date | Higher Level Review Date | Status | Communication Date | Communication Method | Employee Ack Date | Action | Delete |
|-------------------|------------|---------------|--------------------------|--------|--------------------|----------------------|-------------------|--------|--------|
| No results found. |            |               |                          |        |                    |                      |                   |        |        |

5. Select the radio button for the **Job Objective** for which you want to write an assessment.
6. Type your assessment into the **Employee Self-Assessment** box.
7. Select the **Return to Top of Page** button to save the **Self-Assessment**.
8. Repeat **Steps 5 & 6** until each **Job Objective** assessment is complete.

| Job Objectives                   |       |                 |          |                   |
|----------------------------------|-------|-----------------|----------|-------------------|
| Select                           | Order | Objective Title | Status   | Weight % (Option) |
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 25                |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 35                |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                |

Job Objective

Job Objective 1

Employee Self Assessment

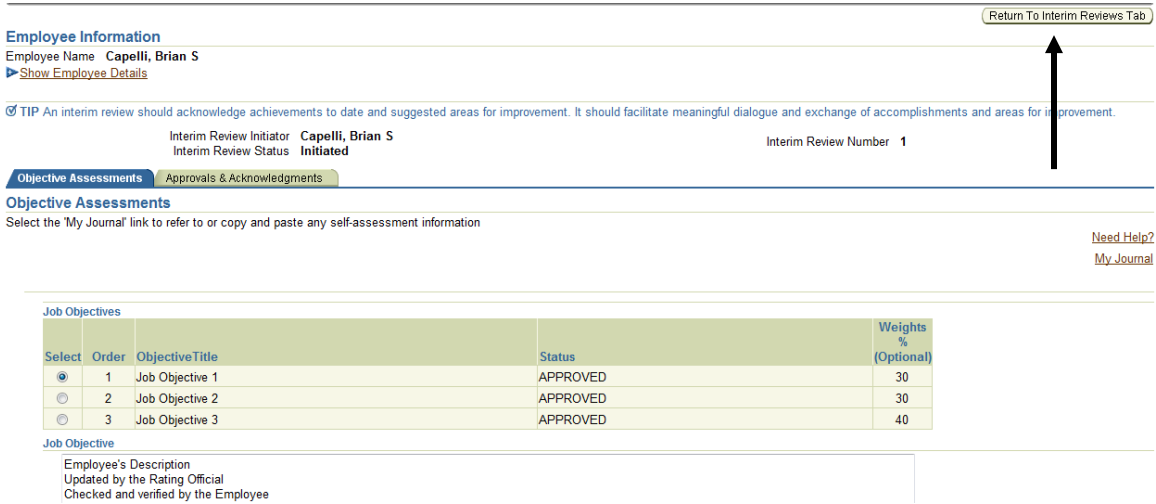
(Limit to 2000 characters)

Counter

Rating Official Assessment

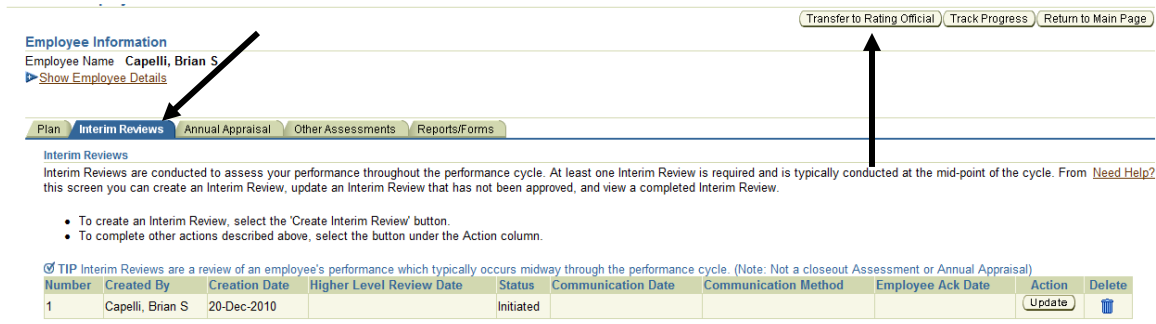
[Return to Top of Page](#)

9. Select the **Return to Interim Reviews Tab** button at the top of the screen when you have completed entering your self-assessment for all your **Job Objectives**.



The screenshot shows the top right corner of a web application interface. A button labeled "Return To Interim Reviews Tab" is highlighted with a black arrow pointing upwards. Below the button, the "Employee Information" section is visible, showing the name "Capelli, Brian S" and a "Show Employee Details" link. A tip message is present, and the "Interim Review Status" is "Initiated". The "Objective Assessments" tab is active, and a "My Journal" link is visible on the right.

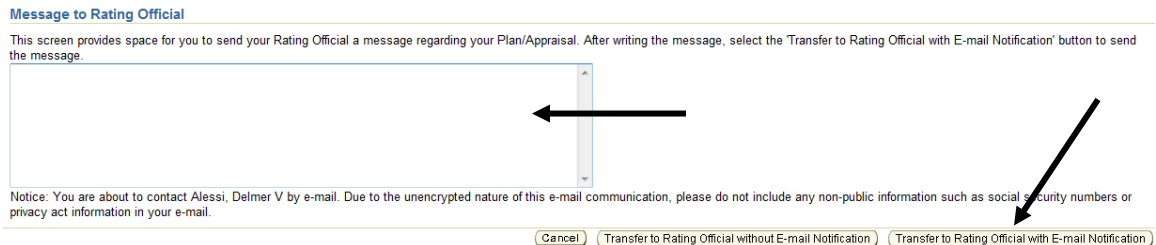
10. Select the **Transfer to Rating Official** button on the **Interim Reviews** tab page.



The screenshot shows the "Interim Reviews" tab page. A black arrow points to the "Interim Reviews" tab in the navigation bar. Another black arrow points to the "Transfer to Rating Official" button in the top right corner. The page includes a table of interim reviews with columns for Number, Created By, Creation Date, Higher Level Review Date, Status, Communication Date, Communication Method, Employee Ack Date, Action, and Delete. The first row shows a review created by "Capelli, Brian S" on "20-Dec-2010" with a status of "Initiated".

11. Type an e-mail message to your **Rating Official**.

12. Select **Transfer to Rating Official with E-mail Notification** button.



The screenshot shows the "Message to Rating Official" screen. A large text area for entering a message is visible, with a black arrow pointing to it from the left. Below the text area, a notice states: "Notice: You are about to contact Alessi, Delmer V by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail." At the bottom, three buttons are shown: "Cancel", "Transfer to Rating Official without E-mail Notification", and "Transfer to Rating Official with E-mail Notification". A black arrow points to the "Transfer to Rating Official with E-mail Notification" button.

## Acknowledge My Completed Interim Review

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current Performance Plan by selecting **Update** from the **Action** drop down menu and select the **Go** button.

**Note:** The PAA Status will be **Interim in Progress**.

Appraisals of Capelli, Brian S

Create New Plan  
--Choose a Plan Type-- (Go)

Records Displayed: 10

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current Plan Status | Action      |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|---------------------|-------------|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2003           | 1248         | 02-Dec-2003        | NG   | Approved    | Interim in Progress | Update (Go) |

3. Select the **Interim Reviews** tab and then the **Update** button on the plan you want to acknowledge.

Plan | **Interim Reviews** | Annual Appraisal | Other Assessments | Reports/Forms

**Interim Reviews**

Interim Reviews are conducted to assess your performance throughout the performance cycle. At least one Interim Review is required and is typically conducted at the mid-point of the cycle. From [Need Help?](#) this screen you can create an Interim Review, update an Interim Review that has not been approved, and view a completed Interim Review.

- To create an Interim Review, select the 'Create Interim Review' button.
- To complete other actions described above, select the button under the Action column.

TIP Interim Reviews are a review of an employee's performance which typically occurs midway through the performance cycle. (Note: Not a closeout Assessment or Annual Appraisal)

| Number | Created By       | Creation Date | Higher Level Review Date | Status                      | Communication Date | Communication Method | Employee Ack Date | Action | Delete |
|--------|------------------|---------------|--------------------------|-----------------------------|--------------------|----------------------|-------------------|--------|--------|
| 1      | Capelli, Brian S | 20-Dec-2010   | 09-Dec-2003              | Pending Empl Acknowledgment | 18-Dec-2002        | Face to Face         |                   | Update |        |

4. Select the **Approvals and Acknowledgments Tab**.
5. In **Step 4: Employee – Acknowledgment**, select the **Acknowledge Receipt** button.

Objective Assessments | **Approvals & Acknowledgments**

**Approvals & Acknowledgments**

Show All Details | Hide All Details

| Details   Tasks   | Status                      | Action              |
|---|-----------------------------|---------------------|
| ▶ Show Step 1: Rating Official - Request or Document Higher Level Review (If Required). | Completed                   |                     |
| ▶ Show Step 2: Higher Level Reviewer - Review (If Required).                            | Completed                   |                     |
| ▶ Show Step 3: Rating Official - Document Communication to Employee                     | Completed                   |                     |
| ▶ Show Step 4: Employee - Acknowledgment  | Pending Empl Acknowledgment | Acknowledge Receipt |

6. Enter the **Date** and select the **Save** button.

Objective Assessments | **Approvals & Acknowledgments**

**Approvals & Acknowledgments**

Show All Details | Hide All Details

| Details   Tasks   | Status                      | Action              |
|---|-----------------------------|---------------------|
| ▶ Show Step 1: Rating Official - Request or Document Higher Level Review (If Required). | Completed                   |                     |
| ▶ Show Step 2: Higher Level Reviewer - Review (If Required).                            | Completed                   |                     |
| ▶ Show Step 3: Rating Official - Document Communication to Employee                     | Completed                   |                     |
| ▼ Hide Step 4: Employee - Acknowledgment  | Pending Empl Acknowledgment | Acknowledge Receipt |

Acknowledgment Pending Empl Acknowledgment  
Other Date 13-Dec-2001 (Save)

# How Do I...Complete My Annual Appraisal?

## Create My Self-Assessment for My Annual Appraisal

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current Performance Plan by selecting **Update** from the **Action** drop down menu and select the **Go** button.

**Note:** The PAA Status is **Interim Review Completed or Plan Approved**.

Appraisals of Capelli, Brian S

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status       | Action                                   |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------------|--|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2003           | 1248         | 02-Dec-2003        | NG   | Approved    | Interim Review Completed | Update <input type="button" value="Go"/> |

3. Select the **Annual Appraisal** tab.

Plan Interim Reviews **Annual Appraisal** Other Assessments Reports/Forms

Plan Details Mission Goals Job Objectives Approvals & Acknowledgments

Plan Details

This screen provides information about the status of your performance plan. [Need Help?](#)

- Update your Appraisal Type and Appraisal Dates, if necessary. **Important Note:** The Appraisal Period Start Date represents the start of your performance evaluation period under this plan. Certain information such as your pay grade and step will be populated on your appraisal form based on this date. For additional guidance select the 'Need Help?' link.
- Change the Rating Official and/or Higher Level Reviewer.
- Transfer the plan to your Rating Official.

To change a Rating Official and/or Higher Level Reviewer or both, select the 'Change Rating Official and/or Higher Level Reviewer' button. When done, select the 'Next' button or the 'Mission Goals' tab.



4. Select the radio button for the **Job Objective** for which you want to write an assessment.
5. Type your self-assessment into the **Employee Self-Assessment** box.
6. Select the **Return to Top of Page** button to save the **Self-Assessment**.

Plan Interim Reviews **Annual Appraisal** Other Assessments Reports/Forms

**Assessments**

Assessments  
Select the 'My Journal' link to refer to or copy and paste any self-assessment information

**Job Objectives**

| Select                           | Order | Objective Title | Status   | Weights % (Optional) |
|----------------------------------|-------|-----------------|----------|----------------------|
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 30                   |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 30                   |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                   |

**Job Objective**  
Employee's Description  
Updated by the Rating Official  
Checked and verified by the Employee

**Employee Self Assessment**  
Annual Appraisal Employee Assessment

**Rating Official Assessment**

[Return to Top of Page](#)

7. Select the **Transfer to Rating Official** button at the top of the screen when you have completed entering your self-assessment for all your **Job Objectives**.

The screenshot shows the 'Assessments' section of a web application. At the top right, there are three buttons: 'Transfer to Rating Official', 'Track Progress', and 'Return to Main Page'. An arrow points to the 'Transfer to Rating Official' button. Below this, there is a navigation bar with tabs for 'Plan', 'Interim Reviews', 'Annual Appraisal', 'Other Assessments', and 'Reports/Forms'. The 'Annual Appraisal' tab is selected. Underneath, there is a section for 'Assessments' with a sub-section for 'Job Objectives'. A table lists three job objectives, all with a status of 'APPROVED'.

| Select                           | Order | Objective Title | Status   | Weights % (Optional) |
|----------------------------------|-------|-----------------|----------|----------------------|
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 30                   |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 30                   |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                   |

8. Type an e-mail to your Rating Official, then select the **Transfer to Rating Official with E-mail Notification** button.

The screenshot shows the 'Message to Rating Official' section. It contains a text input field with a vertical scrollbar. An arrow points to the input field. Below the input field, there is a notice: 'Notice: You are about to contact Alessi, Delmer V by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail.' At the bottom, there are three buttons: 'Cancel', 'Transfer to Rating Official without E-mail Notification', and 'Transfer to Rating Official with E-mail Notification'. An arrow points to the 'Transfer to Rating Official with E-mail Notification' button.

## View My Completed Annual Appraisal

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Select the **+Show Completed Plans/Appraisals** button.

Appraisals of Capelli, Brian S

Create New Plan

--Choose a Plan Type--

Records Displayed 10

| Employee Name     | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action |
|-------------------|---------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--------|
| No results found. |               |                      |                |              |                    |      |             |                    |        |

Select the link to search for completed plans.

[▶ Show Completed Plans/Appraisals](#)

---

Appraisals of Capelli, Brian S

Create New Plan

--Choose a Plan Type--

Records Displayed 10

| Employee Name     | Current Owner | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action |
|-------------------|---------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--------|
| No results found. |               |                      |                |              |                    |      |             |                    |        |

Select the link to search for completed plans.

[▶ Show Completed Plans/Appraisals](#)

3. Select **NG Performance Plan** from the drop down menu and select the **Find** button.
4. Click the **Printer** icon to open the document in a PDF file to save or print.

Select the link to search for completed plans.

[▼ Hide Completed Plans/Appraisals](#)

**Completed Plans/Appraisals**

1. Begin with entering search criteria. The following fields can be entered in any combination (e.g., Appraisal Year only or Appraisal Year and Event).  
 2. Select the Find button. Your results will be based on your search criteria. If there is no search criteria entered, your results will be all Completed Plans/Appraisals.

Appraisal Year

Event

Records Displayed 5

| Appraisal Year | Appraisal ID | Type | Event               | Event Completion Date | Reports/Forms |
|----------------|--------------|------|---------------------|-----------------------|---------------|
| 2001           | 1220         | NG   | NG Performance Plan | 20-Dec-2001           |               |
| 2002           | 1228         | NG   | NG Performance Plan | 20-Dec-2001           |               |
| 2003           | 1248         | NG   | NG Performance Plan | 02-Dec-2003           |               |
| 2018           | 1198         | NG   | NG Performance Plan | 14-Oct-2010           |               |
| 2016           | 1197         | NG   | NG Performance Plan | 14-Oct-2010           |               |
| 2009           | 1209         | NG   | NG Performance Plan | 09-Nov-2010           |               |
| 2011           | 1210         | NG   | NG Performance Plan | 09-Nov-2010           |               |

# How Do I...Complete My Closeout Assessment?

## Create or Update My Self-Assessment for My Closeout Assessment

**Note:** A **Closeout Assessment** is only done if the employee changes duties that require a new **Performance Plan** or if the **Rating Official** changes prior to the end of the **Performance Cycle**.

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current **Performance Plan** by selecting **Update** from the **Action** drop down menu.

**Note:** The PAA Status is **Interim Review Completed** or **Plan Approved**.

Appraisals of Capelli, Brian S

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--------|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2004           | 1252         | 03-Dec-2003        | NG   | Approved    | Plan Approved      | Update |

3. Select the **Other Assessments** tab.

**Plan** | Interim Reviews | Annual Appraisal | **Other Assessments** | Reports/Forms

**Plan Details** | Mission Goals | Job Objectives | Approvals | Acknowledgments

Plan Details  
This screen provides information about the status of your performance plan. [Need Help?](#)

- Update your Appraisal Type and Appraisal Dates, if necessary. **Important Note:** The Appraisal Period Start Date represents the start of your performance evaluation period under this plan. Certain information such as your pay grade and step will be populated on your appraisal form based on this date. For additional guidance select the 'Need Help?' link.
- Change the Rating Official and/or Higher Level Reviewer.
- Transfer the plan to your Rating Official.

To change a Rating Official and/or Higher Level Reviewer or both, select the 'Change Rating Official and/or Higher Level Reviewer' button. When done, select the 'Next' button or the 'Mission Goals' tab.

[Change Rating Official or Higher Level Reviewer](#)

\* Appraisal Type: **Annual Appraisal - NG**  
Appraisal Period Start Date: **01-Oct-2003**

Performance Plan Approval Date: **03-Dec-2003**  
Plan Last Modified: **01-Dec-2003**

4. Select the **Create Closeout Assessment** button.

**Plan** | Interim Reviews | Annual Appraisal | **Other Assessments** | Reports/Forms

**Other Assessments**  
A Closeout Assessment is completed when you change duties that require you be placed on a new performance plan prior to the end of the performance cycle or when your Rating Official changes. [Need Hel](#) prior to the end of the performance cycle.

- To create a Closeout Assessment, select the 'Create Closeout Assessment' button.
- To complete other actions described above, select the button under the Action column.

Closeout Assessments

[Create Closeout Assessment](#)

| Number            | Created By | Creation Date | Status | Communication Date | Communication Method | Employee Ack Date | Action | Delete |
|-------------------|------------|---------------|--------|--------------------|----------------------|-------------------|--------|--------|
| No results found. |            |               |        |                    |                      |                   |        |        |

5. Select the radio button for the **Job Objective** for which you want to write an assessment.
6. Type your self-assessment into the **Employee Self-Assessment** box.
7. Select the **Return to Top of Page** button to save the **Self-Assessment**.
8. Complete **Steps 5 - 7** for each **Job Objective**.

**Job Objectives**

| Select                           | Order | Objective Title | Status   | Weights % (Optional) |
|----------------------------------|-------|-----------------|----------|----------------------|
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 30                   |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 30                   |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                   |

**Job Objective**

Employee's Description  
 Updated by the Rating Official  
 Checked and verified by the Employee

**Employee Self Assessment**

Employee Self Assessment

**Rating Official Assessment**

[Return to Top of Page](#)

9. Select the **Return to Other Assessments Tab** button at the top of the screen when you have completed entering your self-assessment for all your **Job Objectives**.

Return To Other Assessments Tab

**Employee Information**  
Employee Name **Capelli, Brian S**  
[Show Employee Details](#)

**Closeout Assessment Information**  
TIP A closeout assessment should acknowledge achievements to date.  
Closeout Assessment Initiator **Capelli, Brian S**  
Closeout Assessment Status **Initiated**  
Closeout Assessment Number **1**

**Objective Assessments** Communication & Acknowledgments

**Objective Assessments**

Select the 'My Journal' link to refer to or copy and paste any self-assessment information

[Need Help](#)  
[My Journs](#)

**Job Objectives**

| Select                           | Order | Objective Title | Status   | Weights % (Optional) |
|----------------------------------|-------|-----------------|----------|----------------------|
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 30                   |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 30                   |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                   |

**Job Objective**  
Employee's Description

10. Select the **Transfer to Rating Official** button.

Transfer to Rating Official Track Progress Return to Main Page

**Employee Information**  
Employee Name **Capelli, Brian S**  
[Show Employee Details](#)

Plan Interim Reviews Annual Appraisal **Other Assessments** Reports/Forms

**Other Assessments**  
A Closeout Assessment is completed when you change duties that require you be placed on a new performance plan prior to the end of the performance cycle or when your Rating Official changes [Need Help?](#) prior to the end of the performance cycle.

- To create a Closeout Assessment, select the 'Create Closeout Assessment' button.
- To complete other actions described above, select the button under the Action column.

**Closeout Assessments**

| Number | Created By       | Creation Date | Status    | Communication Date | Communication Method | Employee Ack Date | Action                                | Delete                                |
|--------|------------------|---------------|-----------|--------------------|----------------------|-------------------|---------------------------------------|---------------------------------------|
| 1      | Capelli, Brian S | 21-Dec-2010   | Initiated |                    |                      |                   | <input type="button" value="Update"/> | <input type="button" value="Delete"/> |

11. Type an e-mail message if necessary to the Rating Official

12. Select the **Transfer to Rating Official with E-mail Notification** button.

**Message to Rating Official**

This screen provides space for you to send your Rating Official a message regarding your Plan/Appraisal. After writing the message, select the 'Transfer to Rating Official with E-mail Notification' button to send the message.

Notice: You are about to contact Alessi, Delmer V by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail.

## Acknowledge My Closeout Assessment

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
2. Open your current Performance Plan by selecting **Update** from the **Action** drop down menu and select the **Go** button.

**Note:** The PAA Status is **Closeout in Progress**.

Appraisals of Capelli, Brian S

Records Displayed: 10

Create New Plan  
--Choose a Plan Type-- [Go]

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status   | Action      |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|----------------------|-------------|
| Capelli, Brian S | Capelli, Brian S | Alessi, Delmer V     | 2004           | 1252         | 03-Dec-2003        | NG   | Approved    | Closeout in Progress | Update [Go] |

3. Select the **Other Assessments** tab.

Employee Information  
Employee Name: Capelli, Brian S  
[Show Employee Details](#)

Plan | Interim Reviews | Annual Appraisal | **Other Assessments** | Reports/Forms

Plan Details | Mission Goals | Job Objectives | Approvals | Acknowledgments

Plan Details  
This screen provides information about the status of your performance plan. [Need Help?](#)

- Update your Appraisal Type and Appraisal Dates, if necessary. **Important Note:** The Appraisal Period Start Date represents the start of your performance evaluation period under this plan. Certain information such as your pay grade and step will be populated on your appraisal form based on this date. For additional guidance select the 'Need Help?' link.
- Change the Rating Official and/or Higher Level Designer.

4. Select the **Update** button for the plan you want to acknowledge.

Plan | Interim Reviews | Annual Appraisal | **Other Assessments** | Reports/Forms

Other Assessments  
A Closeout Assessment is completed when you change duties that require you be placed on a new performance plan prior to the end of the performance cycle or when your Rating Official changes. [Need H](#) prior to the end of the performance cycle.

- To create a Closeout Assessment, select the 'Create Closeout Assessment' button.
- To complete other actions described above, select the button under the Action column.

Closeout Assessments

| Number | Created By       | Creation Date | Status                      | Communication Date | Communication Method | Employee Ack Date | Action   | Delete   |
|--------|------------------|---------------|-----------------------------|--------------------|----------------------|-------------------|----------|----------|
| 1      | Capelli, Brian S | 21-Dec-2010   | Pending Empl Acknowledgment | 17-Dec-2003        | Face to Face         |                   | [Update] | [Delete] |

5. Select the **Communications & Acknowledgments** tab.
6. In **Step 2: Employee-Acknowledgment**, select the **Acknowledge Receipt** button.

Objective Assessments | **Communication & Acknowledgments**

Communication & Acknowledgments

[Show All Details](#) | [Hide All Details](#)

| Details   | Tasks | Status                      | Action                |
|---|-------|-----------------------------|-----------------------|
| <a href="#">Show</a> Step 1: Rating Official - Document Communication to Employee |       | Completed                   |                       |
| <a href="#">Show</a> Step 2: Employee - Acknowledgment                            |       | Pending Empl Acknowledgment | [Acknowledge Receipt] |

7. Enter an **Acknowledgement Date** and select the **Save** button.


Objective Assessments **Communication & Acknowledgments**

**Communication & Acknowledgments**

Show All Details | Hide All Details

| Details | Tasks  | Status                      | Action              |
|---------|--|-----------------------------|---------------------|
| ▶ Show  | Step 1: Rating Official - Document Communication to Employee | Completed                   |                     |
| ▼ Hide  | Step 2: Employee - Acknowledgment                            | Pending Empl Acknowledgment | Acknowledge Receipt |

Acknowledgment Other Pending Empl Acknowledgment

Date 24-Dec-2003 

**Save**

8. Select the **Other Assessments** tab and then select **Transfer to Rating Official** button.

Employee Information

Employee Name Capelli, Brian S

▶ Show Employee Details


Plan Interim Reviews Annual Appraisal **Other Assessments** Reports/Forms

Other Assessments

A Closeout Assessment is completed when you change duties that require you be placed on a new performance plan prior to the end of the performance cycle or when your Rating Official changes [Need Help?](#)

- To create a Closeout Assessment, select the 'Create Closeout Assessment' button.
- To complete other actions described above, select the button under the Action column.

Closeout Assessments


| Number | Created By       | Creation Date | Status    | Communication Date | Communication Method | Employee Ack Date | Action       | Delete  |
|--------|------------------|---------------|-----------|--------------------|----------------------|-------------------|--------------|---|
| 1      | Capelli, Brian S | 21-Dec-2010   | Completed | 17-Dec-2003        | Face to Face         | 24-Dec-2003       | View History |  |

Transfer to Rating Official Track Progress Return to Main Page

9. Enter any necessary information into the email and select the **Transfer to Rating Official with E-mail Notification** button.

Message to Rating Official

This screen provides space for you to send your Rating Official a message regarding your Plan/Appraisal. After writing the message, select the 'Transfer to Rating Official with E-mail Notification' button to send the message.



Notice: You are about to contact Alessi, Delmer V by e-mail. Due to the unencrypted nature of this e-mail communication, please do not include any non-public information such as social security numbers or privacy act information in your e-mail.

Cancel Transfer to Rating Official without E-mail Notification **Transfer to Rating Official with E-mail Notification**



## Track progress of Plans

1. Once a plan has been started by the employee or supervisor, you can view the progress at any time.
2. Begin at the **Performance Appraisal Application Main Page** (see Pg 2).
3. Select **Track Progress** from the drop down menu and select the **Go** button.

**Plans/Appraisals In Progress**  
ⓘ TIP Only Employees that have a plan in progress are listed below.

Show Me: All Appraisals Appraisal Year: ALL

Create New Plan  
 --Choose a Plan Type-- Go

Records Displayed: 10

| Employee Name    | Current Owner    | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status             | Action                         |
|------------------|------------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------------------|--------------------------------|
| Capelli, Brian S | Alessi, Delmer V | Alessi, Delmer V     | 2002           | 1228         | 20-Dec-2001        | NG   | Approved    | Interim Review Approved by HLR | Track Progress <span>Go</span> |

4. This screen will display a **Check Mark** only **after the action is completed**. This is useful to check to make sure the plan is progressing as required.

**Employee Information**  
 Employee Name: Capelli, Brian S  
[▶ Show Employee Details](#)

This screen provides information regarding the status of your performance plan throughout the performance cycle. When you are done reviewing your status, select the "Return to Previous" button to resume your activity.

| Plan  |                                     |
|---|-------------------------------------|
| Drafted                                       | <input checked="" type="checkbox"/> |
| Reviewed by Higher Level Reviewer             | <input checked="" type="checkbox"/> |
| Approved                                      | <input checked="" type="checkbox"/> |
| Acknowledged by Employee                      | <input checked="" type="checkbox"/> |
| Interim Review                                |                                     |
| Employee - Self-Assessment                    | <input checked="" type="checkbox"/> |
| Rating Official - Assessment                  | <input checked="" type="checkbox"/> |
| Reviewed by Higher Level Review - If Required | <input checked="" type="checkbox"/> |
| Communicated to Employee by Rating Official   | <input type="checkbox"/>            |
| Acknowledged by Employee                      | <input type="checkbox"/>            |
| Appraisal                                     |                                     |
| Employee - Self-Assessment                    | <input type="checkbox"/>            |
| Rating Official - Assessment                  | <input type="checkbox"/>            |
| Higher Level Reviewer Approved                | <input type="checkbox"/>            |
| Communicated to Employee by Rating Official   | <input type="checkbox"/>            |

Return to Previous

5. Select **Return to Previous** to get back to the **Main Page**.

# My Journal

1. **My Journal** is an area where you can write whatever you need. Use it to keep track of events, projects, etc. You can then display the information and copy/paste to your **Performance Appraisal Self-Assessment**.
2. **My Journal** is accessible from tabs at the top of the screen and also in a link found on the **Mission Goals and Job Objectives** screen.

Version 3.0

PAA Main Page Provide Guest Feedback **My Journal**

Employee

## Performance Appraisal Application Main Page

[Need Help?](#)

**Warning:** The Performance Appraisal Application is designated for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.

From the Main Page, you can create, update and view your Performance Plans; view and print part or an entire plan after it is created; and track the status of a plan. You can also search for completed plans by selecting the 'Show Completed Plans/Appraisals' link located at the bottom of this page.

To create a Performance Plan:      To complete other actions described above:

- Select 'Choose a Plan Type'
- Select Appraisal Plan Type
- Select the 'Go' button
- Select an option from the Action column
- Select the 'Go' button

**Important:** To become familiar with the columns, select the 'Need Help?' link.

[Appraisals of Capelli, Brian S](#)

Create New Plan

--Choose a Plan Type--

Records Displayed: 10

| Employee Name    | Current Owner   | Rating Official Name | Appraisal Year | Appraisal ID | Plan Approval Date | Type | Plan Status | Current PAA Status | Action                                 |
|------------------|-----------------|----------------------|----------------|--------------|--------------------|------|-------------|--------------------|--|
| Capelli, Brian S | Hofstad, Will S | Hofstad, Will S      | 2005           | 1258         | 22-Dec-2004        | NG   | Approved    | Closeout Completed | View <input type="button" value="Go"/> |

---

Plan Interim Reviews **Annual Appraisal** Other Assessments Reports/Forms

### Assessments

Select the 'My Journal' link to refer to or copy and paste any self-assessment information

[Need Help?](#)  
[My Journal](#)

#### Job Objectives

| Select                           | Order | Objective Title | Status   | Weights % (Optional) |
|----------------------------------|-------|-----------------|----------|----------------------|
| <input checked="" type="radio"/> | 1     | Job Objective 1 | APPROVED | 25                   |
| <input type="radio"/>            | 2     | Job Objective 2 | APPROVED | 35                   |
| <input type="radio"/>            | 3     | Job Objective 3 | APPROVED | 40                   |

Job Objective

Job Objective 1

3. To add information, select the **My Journal** tab on the **Main Page** (you will only see the **My Journal** as a **PDF** if you select the link in the **Mission Goals and Job Objectives** tab.)
4. Type in information as necessary. (Note: There is an 8000 character cap)
5. Select the **Save** button to save.
6. Select the **Printable Page** to open in PDF.
7. Select **Purge All** to clear the **Journal**.
8. Select the **PAA Main Page** to exit.

The screenshot shows the 'My Journal' page in the PAA system. At the top, there are navigation tabs: 'PAA Main Page', 'Provide Guest Feedback', and 'My Journal'. Below the tabs, there are buttons for 'Purge All', 'Save', and 'Printable Page', along with a 'Need Help?' link. The main content area includes 'Employee Information' for Brian S. Capelli, a tip about tracking accomplishments, and a list of instructions. A text entry area contains the text: '5/7/09 Learned how to access and utilize the Performance Appraisal Application (PAA) tool. Must go and conduct train the trainer.' Below the text area is a character counter showing '129' out of 8000. At the bottom right, there are buttons for 'Purge All', 'Save', and 'Printable Page'. Black arrows point to the 'PAA Main Page' tab, the 'Purge All' button at the top, the text entry area, and the 'Purge All', 'Save', and 'Printable Page' buttons at the bottom.