How do I...

Complete Rating Official (RO) Activities in the National Guard (Title 32) Performance Appraisal Application (PAA)?
Performance Appraisal Flow Chart

This chart shows the basic flow from the Employee to the RO and the HLR

Employee Creates the Plan and sends to the Rating Official

Rating Official reviews and makes changes as necessary

If Changes are made

Rating Official sends to employee for review

Employee reviews changes and sends Plan back to the RO

If NO Changes are made

Rating Official sends Plan to HLR for approval

HLR approves and sends back to the RO

RO transfers the Plan back to the Employee

Employee initiates self-assessments in the Interim Review Tab and sends to the RO

RO completes their assessment and transfers the Interim Review to the HLR for approval

HLR approves the Interim Review sends back to the RO

RO transfers to the Employee

Employee initiates self-assessment in the Annual Appraisal Tab and sends to RO

RO completes their assessment and transfers the Annual Appraisal to the HLR for approval

HLR approves the Annual Appraisal sends back to the RO

RO communicates the Annual Appraisal

Annual Appraisal is posted and the Performance Appraisal is complete

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Note: You can start a Plan, Interim Review, Annual Assessment, or a Closeout Assessment without the Employee; use this function if the Employee is unavailable. (LWOP, schools, etc.)

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HOW DO I…MAKE CHANGES AND RE-APPROVE THE JOB OBJECTIVES OF AN APPROVED PLAN?

Note: At any time after the Plan is Approved and before the Annual Appraisal, the Rating Official can change or add Job Objectives as needed.

Change/Add and Re-Approve Job Objectives............................................ 74

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How do I...Complete Performance Plan Activities?

Complete a plan the Employee has sent me

2. Log into MyBiz.
3. Select NGB region.
4. Select My Workplace and then Performance Appraisal Application (PAA) links.
5. Open an employee's existing **Performance Plan** by selecting **Update** from the **Action** drop-down menu and select the **Go** button. (Must be current owner)

6. From this screen your employees name is shown at the top, check the **dates** and **name** of the **HLR**, then click the **NEXT** button.

7. From here you can add, update, or leave the **Mission Goals**.

8. Select the **Next** button.
9. In the **Job Objectives** tab, you can review, update, or add **Job Objectives** as required.

10. Use the +**Show** next to the **Job Objective Number** to display.

11. You can click on **Update** to change a **Job Objective** or select **Add Job Objective**.

12. When selecting the **Update** button, you can make changes to **Title**, **Start Date**, or **Job Objective**.

13. When finished, select either **Save and Update Another Job Objective** or **Save and Return to Job Objective Tab**.

**Note:** The **Start Date** of the **Job Objective** cannot be **Earlier** than the **Start Date** of the **Plan**.

---

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14. When you have finished reviewing or updating the **Job Objectives**, you need to add **Weight** to the **Job Objectives**. The total **MUST EQUAL 100%**.

15. After you finish reviewing, updating, and assigning weight to **Job Objectives**, click on the **NEXT** button to continue to the **Approvals & Acknowledgments** tab.

16. There are **TWO options:**
   - Transfer the plan back to the employee if you made changes (**Step 17**)
   - Transfer to the **HLR** for approval. (**Step 20**)

17. To transfer to the employee, select **Transfer to Employee**.
18. Write in the e-mail message box if needed and then select the **Transfer to Employee with E-mail Notification** button.

![Image of e-mail message box]

**Message to Employee**

This screen provides space for you to send your employee a message regarding his or her Performance Plan. After writing the message, select the Transfer to Employee with E-mail Notification button to send the message.

Notice: You are about to contact Capelli, Brian B 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.

![Image of e-mail options]

19. When you receive notification that the **Employee** has reviewed the changes, repeat **Steps 1-16** again.


![Image of rating official page]

21. There are TWO options:
   - **Option A- Transfer to the HLR** (Step 22)
   - **Option B- Document for the HLR**. (Step 24)

22. **Option A - Select Transfer to Higher Level Reviewer With E-mail Notification.**

23. After the **HLR** approves and returns the **Plan**, go into the **Plan** to the **Approvals & Acknowledgments** tab and go to **Step 27** below to continue.

![Image of approvals & acknowledgments page]

**Step 27**

---

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24. **Option B – Document the HLR Approval**

**Note:** If you document for the HLR, their name is signed to the plan, therefore make sure you discuss this with the HLR before documenting for them.

25. Enter a **Review Date** and **Method of Review**.

26. Select the **Save** button.

27. In **Step 3 – Rating Official Document Communication to Employee** select the **Start** button.
28. Enter a **Communication Date** and **Communication Method**.

29. There are TWO options:
   - **Save and Transfer to Employee for Acknowledgment** (Step 30)
   - **Save and Go to Step 4** (document the employee’s acknowledgement) (Step 33)

30. Select **Save and Transfer to Employee for Acknowledgement** button.
31. Enter any additional details in the e-mail and select the **Transfer to Employee with E-mail Notification** button.

**Note:** Remind the Employee to go into the **Plan** and **Acknowledge** receipt of the plan.

*Employee will now be the current owner to continue the PA process*

32. Select **Save and go to Step 4** button.

33. In **Step 4: Rating Official-Document Employee Acknowledgement**, select the **Start** button.
34. Choose an **Acknowledgement** and **Date** and then select the **Save** button.

35. Select the **Transfer to Employee** button.

36. Enter any additional information into the e-mail block, select the **Transfer to the Employee with E-mail Notification** button.

**Note:** Employee will now be the current owner to continue the PA process
Complete an Interim Review the Employee has sent me

1. Begin at the **Performance Appraisal Application Main Page (see Pg 3)**.

2. Open an employee's existing Performance Plan by selecting **Update** from the **Action** drop-down menu and select the **Go** button.

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

3. Select the **Interim Reviews** tab.

4. Select **Update**.
5. Select the **Radio** button for the **Job Objective** for which you want to write an assessment.

6. Type your assessment into the **Rating Official Assessment** box.

7. Select the **Return to Top of Page** button to save the assessment.

8. Repeat **Steps 5 - 7** until each **Job Objective** assessment is complete.
9. When finished assessing the individual **Job Objectives**, select **Approvals and Acknowledgments** tab.

10. In **Step 1: Rating Official Request or Document Higher Level Review**, select the **Start** button.

11. There are TWO options:
   
   37. **Option A - Transfer to the HLR** (Step 12)
   38. **Option B - Document for the HLR**. (Step 16)

12. **Option A - Select Transfer to Higher Level Reviewer With E-mail Notification.**

13. After the **HLR** approves and returns the **Interim Review**, go into the **Plan**.

14. Select the **Interim Reviews** tab.

15. Select the **Approvals & Acknowledgments** tab and go to **Step 19** below to continue.
16. **Option B – Document the HLR Approval**

**Note:** If you document for the HLR, their name is signed to the Interim Review, therefore make sure you discuss this with the HLR before documenting for them.

17. Enter a **Review Date** and **Method of Review**.

18. Select the **Save** button.

19. In **Step 3 – Rating Official Document Communication to Employee** select the **Start** button.
20. Enter a **Communication Date** and **Communication Method**.

1. There are TWO options:
   - **Save and Transfer to Employee for Acknowledgement** (Step 22)
   - **Save and Go to Step 4** (document the employee’s acknowledgement) (Step 24)

2. Select **Save and Transfer to Employee for Acknowledgement** button.
3. Enter any additional details in the e-mail and select the Transfer to Employee with E-mail Notification button.

**Note:** Remind the Employee to go into the Plan; Interim Reviews tab; Approvals & Acknowledgements tab and acknowledge the Interim Review.

*Employee will now be the current owner to continue the PA process*

4. Select Save and go to Step 4 button.

5. In Step 4: Rating Official-Document Employee Acknowledgement, select the Start button.
6. Choose an **Acknowledgement** and **Date** and then select the **Save** button.

7. Select the **Transfer to Employee** button.

8. Enter any additional information into the e-mail block, select the **Transfer to the Employee with E-mail Notification** button.

   **Note:** Employee will now be the current owner to continue the PA process.
Complete an Annual Appraisal the Employee has sent me

1. Begin at the **Performance Appraisal Application Main Page** (see Pg 3).

2. Open an employee's existing Performance Plan by selecting **Update** from the **Action** drop down and select the **Go** button.

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

4. Select the **Assessments and Ratings** tab.

5. Select the **Radio** button next to each **Job Objective** to display the **Job Objective** and the employee's self-assessment.
6. Enter your evaluation.

7. Recommend a **Job Objective Rating**.

8. Repeat Steps 5 - 7 until all **Job Objectives** are evaluated.

9. Select the **Rating of Record** tab.

10. Review each **Job Objective Rating** and change if necessary.
11. After reviewing and verifying the **Job Objective Ratings**, select the **Approvals & Acknowledgments** tab.

12. In **Step 1: Rating Official Request or Document Higher Level Review**, select the **Start** button.

13. There are **TWO options**:
   - **Option A - Transfer to the HLR (Step 14)**
   - **Option B - Document for the HLR. (Step 18)**

14. **Option A** - Select **Transfer to Higher Level Reviewer With E-mail Notification**.

15. After the **HLR** approves and returns the **Annual Appraisal**, go into the **Plan**.

16. Select the **Annual Appraisals** tab.

17. Select the **Approvals & Acknowledgments** tab and go to **Step 21** below to continue.
18. **Option B – Document the HLR Approval**

**Note:** If you document for the **HLR**, their name is signed to the Annual Appraisal, therefore make sure you discuss this with the **HLR** before documenting for them.

19. Enter a **Review Date** and **Method of Review**.

20. Select the **Save** button.

21. In **Step 3 – Rating Official Document Communication to Employee** select the **Start** button.

22. Enter a **Communication Date** and **Communication Method**.

23. Select the **Save** button.
24. You now have the option to select the **Print NG Form 430** for your records.
Track progress of Plans

1. Once a plan has been started by the employee or Rating Official, you can view the progress at any time.

2. Begin at the Performance Appraisal Application Main Page (see Pg 3).

3. Select Track Progress from the drop down menu and select Go.

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.

5. Select Return to Previous to get back to the Main Page.
View and Print a completed Appraisal

1. Begin at the **Performance Appraisal Application Main Page (see Pg 3)**.

2. Select the **+Show Completed Plans/Appraisals** drop down menu.

3. Enter the **Employee's** name and select the **Flashlight icon**.

4. After selecting the **Radio button** next to the employee, choose the **Select button**.

---

**Search and Select: Employee Name**

**Search**

Select a field to 'Search By'. Next, enter a value in the text field. Partial searches must begin with the first few characters of the search field followed by the %; e.g., Smith% or 02%. The most common naming convention for Full Name is last name, first name, and middle initial. For best results, enter last name followed by the % and first name followed by the %, e.g. Smith% John%. Select the "Go" button. Select the 'Quick Select' icon next to your selection.

**Results**

<table>
<thead>
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<th>Select</th>
<th>Quick Select</th>
<th>EmpName</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Capelli, Brian S</td>
</tr>
</tbody>
</table>

---

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5. Once you have the employee’s name, select the **Find** button to display their completed plans.

6. Select the Printer icon to print the forms to PDF to keep either a hard or electronic copy.
Complete a Closeout Assessment the Employee has sent to me

Note: A Closeout Assessment is only done if the employee changed duties 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 3).

2. Open an employee's existing Performance Plan by selecting Update from the Action drop down menu and select the Go button.

   Note: The PAA Status is Closeout in Progress.

3. Select the Other Assessments tab.

4. Select the Update button next to the plan you want to continue.

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5. Select the **Radio** button next to each **Job Objective** to display.

6. Enter your assessment for the **Job Objective**.

7. Select **Return to Top of Page** button to save assessment.

8. Complete **Steps 5-7** for each **Job Objective**.
9. Once you have completed an assessment for each **Job Objective**, select the **Communication & Acknowledgments** tab.

10. In **Step 1: Rating Official-Document Communication to Employee**, select the **Start** button.

11. Select a **Communication Date** and **Method**.
12. There are TWO options:
   • **Save and Transfer to Employee for Acknowledgement** (Step 13)
   • **Save and go to Step 2** (Step 15)

13. Select **Save and Transfer to employee for Acknowledgment** button.

14. Add any additional information to the e-mail and then select the **Transfer to Employee with E-mail Notification** button.

   **Note:** Remind the Employee to go into the **Plan; Other Assessments** tab; **Approvals & Acknowledgements** tab and acknowledge the **Closeout Assessment**.
   *Employee will now be the current owner to continue the PA process*

15. Select **Save and go to Step 2**.

16. In **Step 2: Rating Official-Document Employee Acknowledgement**, select the **Start** button.

17. Select **Acknowledgment** and **Date** then select the **Save** button.
Transfer a Completed Closeout Assessment to another Rating Official

1. Begin at the Performance Appraisal Application Main Page (see Pg 3).

2. Select Change RO and/or HLR from the drop down menu and select the Go button.

   Note: Status reads Closeout Complete.

3. Select the flashlight icon next to the Rating Official name.

4. Enter the name of the new Rating Official and select the Go button.

5. Select the Radio button next to the appropriate Rating Official and select the Select button.

6. Complete steps 3-5 if changing the HLR.

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7. After you have selected a new **Rating Official** and/or **HLR**, select the **Save and Continue** button.

8. The plan has now been transferred to the new **Rating Official** and they can complete the **Interim Review** and/or **Annual Appraisal** processes as required.
Viewing and printing a Closeout Assessment

1. The new Rating Official will want to utilize the Closeout Assessment in their Appraisal Process.

2. Begin at the Performance Appraisal Application Main Page (see Pg 3).

3. Open an employee's existing Performance Plan by selecting Update from the Action drop down menu and select the Go button.

   Note: Status reads Closeout Complete.

4. Select the Other Assessments tab.

5. Select the View History button next to the assessment you want to view, it will open in a PDF format for printing or saving.

6. Select Return to Main Page to continue working in the program or Logout to exit.

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How do I…Complete a Plan without the Employee?

Create a plan for my Employee

1. Begin at the Performance Appraisal Application Main Page (see Pg 3).

2. Select National Guard (Title 32) from the Create New Plan drop down menu, select the Go button.

3. The next screen will show the Employees that you supervise, if this information is incorrect, contact your HRO office.

4. Select the Create button for the employee you want to make a plan on.

5. Select the appropriate Start, End, and Appraisal Effective Dates.

6. Check the Rating Official and HLR.

7. Select either Build New Plan (steps below) or Copy From Existing Plan (Pg 42)
8. Input the **Mission Goals** if required.

9. Select the **Next** button to continue.

10. Select the **Add Job Objective** button to create a new Job Objective.
11. Enter the **Job Objective Title**.

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

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

**NOTE:** You must have a **minimum** of **2 Job Objectives**. It is recommended to write at least **3-5 Job Objectives**.

14. 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.

15. After you have completed adding Job Objectives select **Save and Return to Job Objectives Tab**.
16. When you have finished updating the **Job Objectives**, you need to add **Weights** to the **Job Objectives**. The total MUST EQUAL 100%.

17. Select the **Next** button or **Approvals & Acknowledgements** tab when finished.

19. There are TWO options:
   - Option A - Transfer to the HLR (Step 20)
   - Option B - Document for the HLR (Step 22)

20. **Option A** - Select Transfer to Higher Level Reviewer With E-mail Notification.

21. After the HLR approves and returns the Plan, go into the Plan to the Approvals & Acknowledgments tab and go to Step 25 below to continue.

22. **Option B** – Document the HLR Approval

   **Note:** If you document for the HLR, their name still is signed to the plan, therefore make sure you discuss this with the HLR before documenting for them.

23. Enter a Review Date and Method of Review.

24. Select the Save button.

26. Enter a **Communication Date** and Communication Method.

27. Select the Save and go to Step 4 button.
28. In **Step 4: Rating Official-Document Employee Acknowledgement**, select the **Start** button.

29. Choose an **Acknowledgement** and **Date** and then select the **Save** button.
Copy an Existing Plan

1. Follow **Steps 1-6, Pg 35.**

2. From **Step 7 on Pg 35**, select the **Copy from Existing Plan** button.

3. Change the **Employee Name** and/or the **Appraisal Effective Date** if needed.

4. Select the **Find** button.

5. Select the **Copy** button for the plan you want to copy.

6. Now follow **Steps 8-29** starting on **Pg 36** to review and update the plan as needed.
Create an Interim Review for my Employee

Note: RO 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 3).

2. Open an employee's existing Performance Plan by selecting Update from the Action drop-down menu and select the Go button.

3. Select the Interim Reviews tab.

4. Select the Create Interim Review button.
5. Select the Radio buttons for the Job Objective for which you want to write an assessment.

6. Type your assessment into the Rating Official Assessment box.

7. Select the Return to Top of Page button to save the RO Assessment.

8. Repeat Steps 5-7 until each Job Objective assessment is complete.
9. After you have typed an assessment for each Job Objective, select the Approvals & Acknowledgments tab.

10. In Step 1: Rating Official – Request or Document Higher Level Review, select the Start button.

11. Now follow Steps 18-29 starting on Pg 38 to complete the Interim Review.
Create an Annual Appraisal for my Employee

1. Begin at the Performance Appraisal Application Main Page (see Pg 3).

2. Open an employee’s existing Performance Plan by selecting Update from the Action drop down menu and select the Go button.

3. Select the Annual Appraisal tab.

4. Select the Assessments and Ratings tab.

5. Select the Radio button next to each Job Objective to display the Job Objective.
6. Enter your evaluation.

7. Recommend a Job Objective Rating.

8. Repeat Steps 5 - 7 until all Job Objectives are evaluated.

9. Select the Rating of Record tab.

10. Review each Job Objective Rating and change if necessary.
11. After reviewing and verifying the **Job Objective Ratings**, select the **Approvals & Acknowledgments** tab.

12. In **Step 1: Rating Official Request or Document Higher Level Review**, select the **Start** button.

13. There are **TWO options:**
   - **Option A- Transfer to the HLR (Step 14)**
   - **Option B- Document for the HLR. (Step 18)**

14. **Option A - Select Transfer to Higher Level Reviewer With E-mail Notification.**

15. After the **HLR** approves and returns the **Annual Appraisal**, go into the **Plan**.

16. Select the **Annual Appraisals** tab.

17. Select the **Approvals & Acknowledgments** tab and go to **Step 21** below to continue.
18. **Option B – Document the HLR Approval**

**Note:** If you document for the HLR, their name still is signed to the Annual Appraisal, therefore make sure you discuss this with the HLR before documenting for them.

19. Enter a **Review Date** and **Method of Review**.

20. Select the **Save** button.

---

![Image 1](image1.png)

**Option B – Document the higher level review has taken place by entering the following information:**

- **Higher Level Reviewer:** Hlobu, Wili F
- **Review Date:** 01-Dec-2008
- **Method of Review:** Face to Face

---

![Image 2](image2.png)

21. In **Step 3 – Rating Official Document Communication to Employee** select the **Start** button.

---

![Image 3](image3.png)

22. Enter a **Communication Date** and **Communication Method**.

23. Select the **Save** button.

---

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24. You now have the option to select the **Print NG Form 430** for your records.
Create a Closeout Assessment and Transfer the Plan for my Employee.

1. Begin at the Performance Appraisal Application Main Page (see Pg 3).

2. Open an employee's existing Performance Plan by selecting Update from the Action drop down menu and select the Go button.

   **Note:** Status is either Plan Approved or Interim Review Complete.

3. Select the Other Assessments tab.

4. Select Create Closeout Assessment.
5. Select the radio button next to each **Job Objective** to display.

6. Enter your Assessment for the Job Objective

7. Select **Return to Top of Page** button to save assessment.

8. Complete **Steps 5 - 7** for each Job Objective
9. Once you have completed an Assessment for each **Job Objective**, select the **Communication & Acknowledgments** tab.

10. In **Step 1: Rating Official-Document Communication to Employee**, select the **Start** button.

11. Select a **Communication Date** and **Method**.

12. Select **Save and go to Step 2**.

14. Select Acknowledgment and Date then select the Save button.

15. Select Return to Main Page button.

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16. From the **Performance Appraisal Application Main Page**, select **Change RO and/or HLR** from the drop down menu.

17. Select the **Go** button.

**Note:** Plan status is Closeout Complete.

18. Select the **Flashlight Icon** next to the **Rating Official**.

19. Enter a **Name** to search by.

20. Select the **Go** button.

21. Select the **Radio** button next to the correct person.

22. Select the **Select** button.
23. Redo Steps 18-25 for the HLR if needed.

24. After the correct **Rating Official** and **HLR** are displayed, select the **Save and Continue** button.

25. The plan has been **Closed Out** and is **Transferred** to the new **Rating Official** and/or **HLR**.

---

**New Employee Information**

- **Employee Name**: Capell, Brian S
- **Show Employee Details**: [Click here to show employee details]

- **Appraisal Type**: Annual
- **Appraisal Start Date**: 01-Oct-2004
- **Appraisal Period End Date**: 30-Sep-2005
- **Appraisal Effective Date**: 01-Oct-2005
- **Rating Official Name**: Holstad, Rob S
- **Higher Level Reviewer Name**: Holstad, Rob S

- **Performance Plan Approval Date**: 30-Dec-2004
- **Plan Last Modified**: 14-Dec-2004

---

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How do I…Apply Actions to Multiple Employees?

Change the Rating Official for Multiple Employees

Note: You need to complete a Closeout Assessment if the plan has been approved for 120 days.

1. Start on the PAA Navigator page.
2. Select Apply Action(s) to Multiple Employees (PAA).
4. Select the Start button.
5. Select the **Change Rating Official Radio** button.

6. Select the **Start** button.

7. Select the **Flashlight Icon**.
8. Enter the **Current Rating Official's** name.

9. Select the **Go** button.

10. Select the **Radio** button next to the appropriate **Rating Official**.

11. Select the **Select** button.

12. Select the **Find** button.

13. Select the **Plans** you want to **Transfer** using the **Check Boxes**.

14. Select the **Next** button.
15. Select the **Flashlight Icon**.

16. Enter the **New Rating Official’s** name.

17. Select the **Go** button.

18. Select the new **Rating Official** using the **Radio** button.

19. Select the **Select** button.

20. Select the **Save** button.
Copy Employee’s Current Plan for Next Rating Cycle

1. Start on the PAA Navigator page.

2. Select **Apply Action(s) to Multiple Employees (PAA)**.

3. Select **NG-Rating Official**.

4. Select the **Start** button.
5. Select the **Copy Employee’s Current Plan for Next Rating Cycle** button.

6. Select the **Start** button.

### Available Actions

<table>
<thead>
<tr>
<th>Select Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Higher Level Reviewer</td>
</tr>
<tr>
<td>Change Rating Official</td>
</tr>
<tr>
<td>Copy Employee’s Current Plan for Next Rating Cycle</td>
</tr>
<tr>
<td>Copy One Active Plan to Multiple Employees</td>
</tr>
<tr>
<td>Document Communication of the Plan (Must be Current Owner)</td>
</tr>
<tr>
<td>Document Communication of the Final Rating (Must be Current Owner)</td>
</tr>
<tr>
<td>Document Communication of the Interim Review (Must be Current Owner)</td>
</tr>
<tr>
<td>Request or Document Higher Level Review of the Plan (Must be Current Owner)</td>
</tr>
<tr>
<td>Request or Document Higher Lvl Review of Interim Review (Must be Current Owner)</td>
</tr>
<tr>
<td>Retrieve Plan/Appraisal from Employee</td>
</tr>
<tr>
<td>Retrieve Plan/Appraisal from Higher Level Reviewer</td>
</tr>
<tr>
<td>Transfer to Employee (Must be Current Owner)</td>
</tr>
<tr>
<td>View/Print Current Employee Plan/Appraisal Info</td>
</tr>
</tbody>
</table>

7. Select the **Flashlight Icon**.
8. Enter the **Current Rating Official**’s name.

9. Select the **Go** button.

10. Select the **Radio** button next to the appropriate **Rating Official**.

11. Select the **Select** button.

12. Select the **Find** button.

13. Select the **Plans** you want to **Copy** using the **Check Boxes**.

14. Select the **Next** button.
15. Enter an **Appraisal Type**, **Start Date**, **End Date**, and **Effective Date**.

16. Select the **Flashlight** Icon for the **Rating Official**.

17. Enter the **New Rating Official’s Name**, select the **Go** button.

18. Use the **Radio** button to select **Rating Official**.

19. Select the **Select** button.

20. Repeat **Steps 17-20** to select the **Higher Level Reviewer**.
21. After you have selected a HLR, select the Copy button.

22. Select either the Home or Logout buttons to exit.

23. Select the Return to Available Actions to continue in the program.
Copy One Active Plan to Multiple Employees

1. Start on the PAA Navigator page.

2. Select Apply Action(s) to Multiple Employees (PAA).


4. Select the Start button.
5. Select the **Copy One Active Plan to Multiple Employees** radio button.

6. Select the **Start** button.

### Available Actions

<table>
<thead>
<tr>
<th>Select Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Change Higher Level Reviewer</td>
</tr>
<tr>
<td>○ Change Rating Official</td>
</tr>
<tr>
<td>○ Copy Employee’s Current Plan for Next Rating Cycle</td>
</tr>
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<td>○ Document Communication of the Plan (Must be Current Owner)</td>
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<tr>
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<tr>
<td>○ Request or Document Higher Level Review of the Plan (Must be Current Owner)</td>
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<tr>
<td>○ Retrieve Plan/Appraisal from Employee</td>
</tr>
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</tr>
<tr>
<td>○ Transfer to Employee (Must be Current Owner)</td>
</tr>
<tr>
<td>○ View/Print Current Employees Plan/Appraisal Info</td>
</tr>
</tbody>
</table>

7. Select the **Employees** that will be receiving the copied **Plan** using the **Check Boxes**.

8. Select the **Next** button.

9. Select the **Flashlight Icon** next to **Employee Name**. This is the **Employee** that has the plan you will be copying.
10. Enter the **Employee’s** name you will be copying the **Plan** from.

11. Select the **Go** button.

12. Select the **Radio** button next to the **Employee**.

13. Select the **Select** button.

14. Select **Apply Filter** button.

15. Select the **Radio** button next to the **Plan** you will be copying.

16. Select the **Next** button.

17. Enter an **Appraisal Type**, **Start Date**, **End Date**, and **Effective Date**.

18. Select the **Flashlight Icon** next to **Rating Official**.

**Plan Setup Details**
* Indicates Required Field

- **Appraisal Type**: Annual Appraisal - NG
- **Appraisal Period Start Date**: 01-Oct-2010
- **Appraisal Period End Date**: 30-Sep-2011
- **Appraisal Effective Date**: 01-Oct-2011
- **Rating Official Name**
- **Higher Level Reviewer**
19. Enter **Rating Official’s Name**.

20. Select the **Go** button.

21. Select the **Radio** button next to the **Rating Official’s Name**.

22. Select the **Select** button.

23. Select the **Flashlight Icon** next to the **HLR**.

<table>
<thead>
<tr>
<th>* Appraisal Type</th>
<th><strong>Annual Appraisal - NG</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TIP</strong>: The Appraisal Period Start Date base salary and pay schedule/pay b</td>
<td></td>
</tr>
<tr>
<td>* Appraisal Period Start Date</td>
<td>01-Oct-2010</td>
</tr>
<tr>
<td>* Appraisal Period End Date</td>
<td>30-Sep-2011</td>
</tr>
<tr>
<td>* Appraisal Effective Date</td>
<td>01-Oct-2011</td>
</tr>
<tr>
<td>* Rating Official Name</td>
<td>Alessi, Delmer V</td>
</tr>
<tr>
<td>* Higher Level Reviewer</td>
<td></td>
</tr>
</tbody>
</table>

* [Search By Name] alessi d [Go]

[Results table]

[Flashlight Icon next to HLR]
24. Enter the **HLR’s Name**.

25. Select the **Go** button.

26. Select the **Radio** button next to the **HLR’s Name**.

27. Select the **Select** button.

28. Select the **Copy** button.
VIEW/PRINT CURRENT EMPLOYEE PLAN/APPRaisal INFO

1. Start on the PAA Navigator page.

2. Select Apply Action(s) to Multiple Employees (PAA).


4. Select the Start button.
5. Select the **View/Print Current Employee Plan/Appraisal Radio** button.

6. Select the **Start** button.

**Available Actions**

- Change Higher Level Reviewer
- Change Rating Official
- Copy Employee's Current Plan for Next Rating Cycle
- Copy One Active Plan to Multiple Employees
- Document Communication of the Plan (Must be Current Owner)
- Document Communication of the Final Rating (Must be Current Owner)
- Document Communication of the Interim Review (Must be Current Owner)
- Request or Document Higher Level Review of the Plan (Must be Current Owner)
- Request or Document Higher Lvl Review of Interim Review (Must be Current Owner)
- Retrieve Plan/Appraisal from Employee
- Retrieve Plan/Appraisal from Higher Level Reviewer
- Transfer to Employee (Must be Current Owner)
- **View/Print Current Employee Plan/Appraisal Info**
7. Select an **Appraisal Year**.

8. Select an **Appraisal Status**.

9. Choose a **Report Orientation**.

10. Make selections on which sections you wish to view.

11. Select the **Submit Request** button.

12. Select the **Refresh** button until the **Phase** displays **Completed**.

13. Select the **Output** icon to display the information requested.

14. Select either the **Home** or **Logout** buttons to exit.
Change/Add and Re-Approve Job Objectives

Note: During the PA Cycle, it may be necessary to Add/Change a Job Objective, it will then need to be Re-Approved.

1. Begin at the Performance Appraisal Application Main Page (see Pg 3).

2. Open an employee's existing Performance Plan by selecting Update from the Action drop down and select the Go button.

3. Select the Job Objectives tab (Check to ensure you are in the Plan tab).

4. Select the +Show button to display Job Objectives.

5. Select the Update button to make changes to the Job Objective.
6. Make appropriate changes to the **Job Objective Title**, **Start Date**, and/or **Job Objective**.

7. 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**.

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

9. Select the **Job Objective Re-Approvals** tab.

10. In **Step 1 – Rating Official – Request or Document Higher Level Review**, select the **Start** button.
11. There are TWO options:

- **Option A- Transfer to the HLR** (Step 12)
- **Option B- Document for the HLR.** (Step 14)

12. **Option A - Select Transfer to Higher Level Reviewer With E-mail Notification.**

13. After the HLR approves and returns the Plan, go into the **Plan** to the **Job Objective Re-Approvals** tab and go to **Step 17** below to continue.

14. **Option B – Document the HLR Approval**

**Note:** If you document for the HLR, their name is signed to the plan, therefore make sure you discuss this with the HLR before documenting for them.

15. Enter a **Review Date** and **Method of Review**.

16. Select the **Save button.**

18. Enter a Communication Date and Communication Method.

19. There are TWO options:
   - **Save and Transfer to Employee for Acknowledgment** (Step 20)
   - **Save and Go to Step 4** (document the employee’s acknowledgement) (Step 22)
20. Select **Save and Transfer to Employee for Acknowledgement** button.

21. Enter any additional details in the e-mail and select the **Transfer to Employee with E-mail Notification** button.

**Note:** Remind the Employee to go into the **Plan** and **Acknowledge** receipt of the plan.  
*Employee will now be the current owner to continue the PA process*

22. Select **Save and go to Step 4** button.

24. Choose an Acknowledgement and Date and then select the Save button.

25. Select the Transfer to Employee button.
26. Enter any additional information into the e-mail block, select the **Transfer to the Employee with E-mail Notification** button.

**Note:** Employee will now be the current owner to continue the PA process