



Interim Review (IR) Process

Step-by-Step Guide



Requirements and Roles

REQUIREMENTS:

- Progress on performance
- Minimum – 1 per rating cycle
- Communication is Key!!

Who can initiate the Interim Review?

- Employee ([*begin on slide 9*](#))
 - If Rating Official has ownership of plan, RO must first transfer to the employee
- Rating Official ([*begin on slide 4*](#))



Sequence of Events

WHO	ACTION (Hyperlinked)	SLIDES
Rating Official	Transfer Performance Plans to employees	4-8
Employee	Create Interim Review, add self-assessment, & transfer to Rating Official	9-16
Rating Official	Review employee assessment, add supervisory assessment, & obtain Higher Level Review	17-28
Higher Level Reviewer	Review assessments, approve, or return for changes	29-34
Rating Official	Conduct Interim Review discussion & obtain employee acknowledgement	35-41
Employee	Acknowledge Interim Review	42-45



Rating Official Actions

Transfer Performance Plans to Employees

Interim Review – RO Transfer performance plans to employees

The screenshot shows the Department of Defense web portal. At the top left is the Department of Defense logo. To its right is the text "Department of Defense". Further right is a navigation bar with links: "ICE MyBiz", "ICE PAA V2", "ICE PAA V3", "Logout", "Preferences", "Oracle Help", and "Personalize Page". Below this is a "Navigator" section with a search box containing "Please select a responsibility." and two folder icons: "My Biz" and "My Workplace". A yellow callout box with a red border points to the "My Workplace" folder, containing the text "1. Select My Workplace". To the right is a "Favorites" section with an "Edit Favorites" button and a text box containing instructions: "After using your browser to access DCPDS, close all of your browser windows and restart a new browser session. Sometimes the browser can hold that information in memory (e.g. cache, etc) and some web sites know where to look to find it. For more information [Click here](#)".

The screenshot shows the Department of Defense web portal. At the top left is the Department of Defense logo. To its right is the text "Department of Defense". Further right is a navigation bar with links: "ICE MyBiz", "ICE PAA V2", "ICE PAA V3", "Logout", "Preferences", "Oracle Help", and "Personalize Page". Below this is a "Navigator" section with a search box containing "Please select a responsibility." and two folder icons: "My Biz" and "My Workplace". The "My Workplace" folder is expanded, showing a list of items: "All Actions Awaiting Your Attention", "Performance Appraisal Application (PAA)", "My Employee Information", "Update My Information", "Apply Action(s) to Multiple Employees (PAA)", "NSP Performance Management Reports", "Print Performance Management Reports", and "Requests". A yellow callout box with a red border points to the "Apply Action(s) to Multiple Employees (PAA)" item, containing the text "2. Select Apply Action(s) to Multiple Employees (PAA)". To the right is a "Favorites" section with an "Edit Favorites" button and a text box containing instructions: "After using your browser to access DCPDS, close all of your browser windows and restart a new browser session. Sometimes the browser can hold that information in memory (e.g. cache, etc) and some web sites know where to look to find it. For more information [Click here](#)". Below the text box is a "New" starburst icon and the text "Interactive Customer Evaluation (ICE) replaces My Biz Suggestions".

Interim Review – RO Transfer performance plans to employees

Performance Appraisal Application (PAA)
Version 3.0

[ICE MyBiz](#) [ICE PAA V2](#) [ICE PAA V3](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

Apply Action(s) to Multiple Employees (PAA)

[Switch to HLR Actions on Multiple Employees](#) [Need Help?](#)

Available Actions

Select an action from the list below and then select Start to display the appraisals for which you can apply the action.

Select Action

- 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 Appraisal Info

[Cancel](#) [Start](#)

Note other mass actions that you can use later in the Interim Review process: Higher Level Review and communication of the Interim Review.

Select **"Transfer to Employee"**

Interim Review – RO Transfer performance plans to employees



Performance Appraisal Application (PAA)

Version 3.0

[ICE MyBiz](#) [ICE PAA V2](#) [ICE PAA V3](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

Transfer to Employee

TIP Please enter the current Rating Official's name of the employees the action will be applied to. [Select the Find button](#)

* Indicates Required Field

* Current Rating Official 

Current PAA Status

Appraisal Year

[Need Help?](#)

Search Results

Select the records to which the action should be applied and select Next.

[Select All](#) | [Select None](#)

Select	Employee Name	Current Owner	Appraisal Year	Appraisal Id	Plan Approval Date	Plan Status	Current PAA Status
<input type="checkbox"/>	Newton, Vasiliki	Wattenberg, Britteny	2010	32536	16-Oct-2008	Approved	Interim in Progress
<input type="checkbox"/>	Nolda, Deangelo	Wattenberg, Britteny	2010	32538	15-Dec-2008	Approved	Closeout Completed

1. A list of your employees should show, if not enter YOUR name and Appraisal Year: 2011, and click the flashlight.

2. Select <Find>

3. Select all or select individual employees, then <Next>

Interim Review – RO Transfer performance plans to employees

3. When you are done, select Logout

Performance Appraisal Application (PAA)
Version 3.0

ICE MyBiz ICE PAA V2 ICE PAA V3 Home Logout Preferences Personalize Page

Transfer to Employee

Rating Official Notification to Employees

Click Transfer to Employee to share the appraisal with the employee. [Need Help?](#)

Notification Comments
Enter your message and click Transfer to Employee to share the appraisal with the employee.
Notice: You are about to contact the individuals below 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 action information in your e-mail.

Please create your interim review if you have not already done so, and enter your self-assessment, then return your plan to me NLT Friday. Thanks...]

1. Enter the message that will accompany your email notification to your employees

2. Then select <Transfer to Employee>

Transfer to Employee Cancel

Selected Employees

Employee Name	Current Owner	Appraisal Year	Appraisal Id	Plan Approval Date	Plan Status	Current PAA Status
Newton, Vasiliki	Wattenberg, Britteny	2010	32536	16-Oct-2008	Approved	Interim in Progress
Nolda, Deangelo	Wattenberg, Britteny	2010	32538	15-Dec-2008	Approved	Closeout Completed

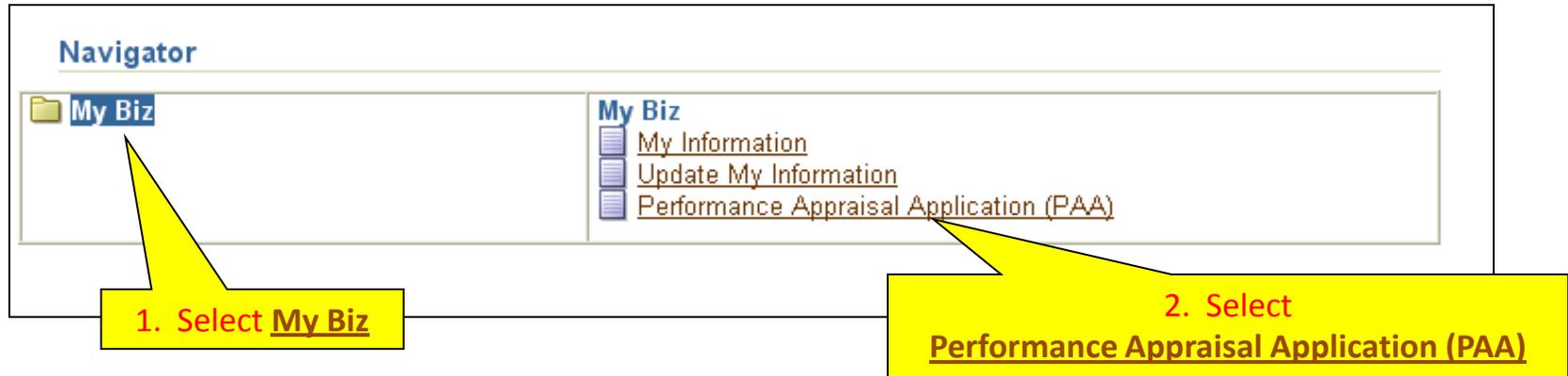
[Return to TOC](#)



Employee Actions

- Create Interim Review
- Enter Interim Review self-assessment
- Transfer plan to Rating Official

Employee: Create Interim Review



Employee: Create Interim Review

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:

- Select 'Choose a Plan Type'
- Select Appraisal Plan Type
- Select the 'Go' button

To complete other actions described above:

- 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 Newton, Vasiliki

Create New Plan

--Choose a Plan Type--

Go

Table Size 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Newton, Vasiliki	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Plan Approved	Update

Select the link to search for completed plans.

[▶ Show Completed Plans/Appraisals](#)

Make sure Action shows "Update," then select <Go>

Employee: Create Interim Review

NSPS PAA

Employee Information

Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

Transfer to Rating Official Track Progress Return to Main Page

1. Select the "Interim Reviews" tab

Plan Interim Reviews Annual Appraisal Other Assessments Reports/Forms

Plan Details Mission Goals Job Objectives Component Unique (Optional) Approvals and Acknowledgments

Plan Details

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

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

Interim Reviews [Need Help?](#)

Interim Reviews are conducted to assess employee performance throughout the performance cycle. At least one Interim Review is required and is typically conducted at the mid-point of the cycle. From 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. This button is only available when the Plan Status is 'Not Started'.
- To complete other actions described above, select the button under the Action column.

2. Select <Create Interim Review>

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.									

Employee: Enter self-assessment

Job Objectives

Select	Number	Job Objective Title	Status	Weight % (Optional)
<input checked="" type="radio"/>	1	Program review and analysis	APPROVED	40
<input type="radio"/>	2	Evaluation and inspection	APPROVED	30
<input type="radio"/>	3	Industrial property software	APPROVED	30

Radio buttons control which job objective is displayed

Job Objective

Accomplish the review, analysis and evaluation of current or projected industrial property programs in accordance with established timelines and applicable laws, regulations, agreements and policies (as it relates to specific program). Coordinate with representatives of other installations, other components, and DoD agencies in developing, monitoring and evaluating joint industrial property programs. Based on these reviews and analysis, complete program enhancements in a timely manner per published component guidance.

Contributing Factor(s)

Cooperation and Teamwork, Communication

Employee Self Assessment

Enter self-assessment for job objective #1 here.

PAA doesn't have spell-checking capability; therefore, It is recommended to compose assessments in Word, then copy and paste the text for the first objective into this block.



(Limit to 2000 characters)

Counter

Employee: Enter self-assessment

Contributing Factor(s)

Cooperation and Teamwork, Communication

Employee Self Assessment

During this rating cycle, I worked on the best practices initiative for logistics streamlining. I met with contractors and representatives from other components and we reviewed current best practices documentation and developed our own set of best practices for consideration by the Logistics Steering Committee. The Committee approved all the recommendations and commended the team for a good job. The initiative was faced with challenges resulting from the widely dispersed team members (making it difficult to meet), and a very tight time frame imposed by the Committee. As a result of our efforts, the streamlining process is well under way and we've reduced logistics timeframes by 17% overall, with further improvements anticipated in the future as more best practices are employed.

CF Cooperation and Teamwork was displayed by the commendation received by the members of the streamlining team from the Steering Committee.

CF Communication was demonstrated by the requirement for me to present findings to the Steering Committee, comprised of high-ranking officers and executives from different departments. I was complimented for the accuracy and succinctness of my briefing.

(Limit to 2000 characters)

Character limit: 2000

Counter

Counter 1197

Rating Official Assessment

When done, select
<Save and Return to Top of Page>
(or scroll up)

Save and Return to Top of Page

Employee: Enter self-assessment

Job Objectives

Select	Number	Job Objective Title	Status	Weight % (Optional)
<input type="radio"/>	1	Program review and analysis	APPROVED	40
<input checked="" type="radio"/>	2	Evaluation and inspection	APPROVED	30
<input type="radio"/>	3	Industrial property software	APPROVED	30

Job Objective

As required, participate in evaluation and inspection teams and study groups formed to evaluate logistics readiness support to units and activities. Based on inspection, review and studies, prepares and submits detailed analyses and/or reports with technical evaluation and recommendations for policy, process, and organizational change (reviewed by supervisor for quality, accuracy, and completion) within supervisor established suspense date.

Select next objective...

Contributing Factor(s)

Resource Management

Employee Self Assessment

Enter self-assessment for job objective #2 here.

Continue until completion of self- assessments for each objective.

(Limit to 2000 characters)

Counter

Employee: Transfer your plan back to Rating Official

Performance Appraisal Application (PAA)
Version 3.0

ICE MWBIZ ICE PAA V2 ICE PAA V3 Home Logout Preferences Personalize Page

Return to Interim Reviews Tab

Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

NSPS PAA

Transfer to Rating Official Track Progress Return to Main Page

Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

You will have an option to provide an email notification to your rating official.

Plan Interim Reviews Annual Appraisal Other Assessments Reports/Forms

Appraisals of Newton, Vasiliki

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

Table Size 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Wattenberg, Britteny	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim in Progress	View Go

Rating Official is now the owner

Current status: "Interim in Progress"

[Return to TOC](#)



Rating Official Actions

- Review employee's self-assessment
- Add Rating Official assessment
- Obtain or document Higher Level Review

Rating Official: Review employee's Interim self-assessment

The screenshot shows a web application interface with a 'Navigator' section on the left and a 'Favorites' section on the right. The 'Navigator' section contains a tree view with 'My Biz' and 'My Workplace' folders. The 'My Workplace' folder is expanded, showing a list of links: 'All Actions Awaiting Your Attention', 'Performance Appraisal Application (PAA)', 'My Employee Information', 'Update My Information', and 'Apply Action(s) to Multiple Employees (PAA)'. Below this is a section for 'NSPS Performance Management Reports' with links for 'View/Print Performance Management Reports' and 'View Previous Requests'. The 'Favorites' section has an 'Edit Favorites' button and a text box with instructions about browser sessions. A yellow callout box points to the 'My Workplace' folder with the text '1. Select My Workplace'. Another yellow callout box points to the 'Performance Appraisal Application (PAA)' link with the text '2. Select Performance Appraisal Application (PAA)'. A 'New' starburst icon is visible near the bottom right of the interface.

1. Select My Workplace

2. Select Performance Appraisal Application (PAA)

After using your browser to access DCPDS, close all of your browser windows and restart a new browser session. Sometimes the browser holds that information in memory (e.g. some web sites keep users to

New

(ICE) replaces My Biz Suggestions

Rating Official: Review employee's Interim self-assessment

Rating Official/Higher Level Reviewer

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 employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, 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.

Plans/Appraisals In Progress

Show Me Appraisal Year

--Choose a

Table Size

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Nolda, Deangelo	Wattenberg, Britteny	Wattenberg, Britteny	2010	32538	15-Dec-2008	NSPS	Approved	Closeout Completed	<input type="text" value="Update"/> <input type="button" value="Go"/>
Newton, Vasiliki	Wattenberg, Britteny	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim in Progress	<input type="text" value="Update"/> <input type="button" value="Go"/>

Make sure Action shows "Update," then select <Go>

Note Current PAA Status is "Interim in Progress"

Rating Official: Review employee's Interim self-assessment

NSPS PAA - Rating Official

Employee Information Transfer to Employee Track Progress Return to Main Page

Employee Name **Newton, Vasilij**
[Show Employee Details](#)

Plan Interim Reviews Annual Appraisal Other Assessments Reports/Forms

Plan Details Mission Goals Job Objectives Component Unique (Optional) Approvals and Acknowledgments

Plan Details [Need Help?](#)

This screen provides information about the status of your employee's performance plan.

- Update the Appraisal Type and Appraisal Dates, if necessary.

Important Note: The Appraisal Period Start Date represents the start of your employee's performance evaluation period under this plan. Certain information such as the pay schedule and pay band will be populated on the 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 Performance Plan to your employee

To change a Rating Official, Higher Level Reviewer or both, then 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 and/or Higher Level Reviewer

Rating Official: Review employee's Interim self-assessment

Employee Information

Employee Name **Newton, Vasiliki**

[▶ Show Employee Details](#)

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

Interim Reviews

[Need Help?](#)

Interim Reviews are conducted to assess employee performance throughout the performance cycle. At least one Interim Review is required and is typically conducted at the mid-point of the cycle. From 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. This button is only available when the Plan Status is Approved.
- To complete other actions described above, select the button under the Action column.

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
2	Newton, Vasiliki	26-Feb-2009		Initiated				<input type="button" value="Update"/>	

Select <Update>

Rating Official: Review employee's Interim self-assessment

Assessments Approvals and Acknowledgments

Assessments

This screen allows you to view your employee's Job Objective and self-assessment, and to type or copy and paste your evaluation. Use the appropriate Performance Indicator and Contributing Factor benchmark descriptors to write your assessment.

- Select the 'Radio' button next to the Job Objective you want to evaluate.
- Once you have completed your assessment for each Job Objective, select the 'Approvals and Acknowledgements' button to begin the approvals process.

Important Note: If you transfer to the employee after you have entered your assessment and before the approvals process has been completed, your employee will be able to view your assessment.

[Need Help?](#)

Job Objectives

Select	Number	Job Objective Title	Status	Weights % (Optional)
<input checked="" type="radio"/>	1	Program review and analysis	APPROVED	40
<input type="radio"/>	2	Evaluation and inspection	APPROVED	30
<input type="radio"/>	3	Industrial property software	APPROVED	30

Job Objective

Accomplish the review, analysis and evaluation of current or projected industrial property programs in accordance with established timelines and applicable laws, regulations, agreements and policies (as it relates to specific program). Coordinate with representatives of other installations, other components, and DoD agencies in developing, monitoring and evaluating joint industrial property programs. Based on these reviews and analysis, complete program enhancements in a timely manner per published component guidance.

Radio buttons control what job objective is displayed

Rating Official reviews employee's self-assessment and adds assessment for the Interim Review, one job objective at a time, by selecting the radio button for each one—doing so displays that job objective and its respective assessment blocks.

Rating Official: Add Interim assessment

Employee Self Assessment

During this rating cycle, I worked on the best practices initiative for logistics streamlining. I met with contractors and representatives from other components and we reviewed current best practices documentation and developed our own set of best practices for consideration by the Logistics Steering Committee. The Committee approved all the recommendations and commended the team for a good job. The initiative was faced with challenges resulting from the widely dispersed team members (making it difficult to meet), and a very tight time frame imposed by the Committee. As a result of our efforts, the streamlining process is well under way and we've reduced logistics timeframes by 17% overall, with further improvements anticipated in the future as more best practices are employed.

CF Cooperation and Teamwork was displayed by the commendation received by the members of the streamlining team from the Steering Committee.

CF Communication was demonstrated by the requirement for me to present findings to the Steering Committee, comprised of high-ranking officers and executives from different departments. I was complimented for the accuracy and succinctness of my briefing.

Review employee's self-assessment for job objective #1 here.

Rating Official Assessment

Enter Rating Official assessment for job objective #1 here.

PAA doesn't have spell-checking capability; therefore, It is recommended to compose assessments in Word, then copy and paste the text for the first objective into this block.

(Limit to 2000 characters)

Counter

Save and Return to Top of Page



Rating Official: Add Interim assessment

Employee Self Assessment

During this rating cycle, I worked on the best practices initiative for logistics streamlining. I met with contractors and representatives from other components and we reviewed current best practices documentation and developed our own set of best practices for consideration by the Logistics Steering Committee. The Committee approved all the recommendations and commended the team for a good job. The initiative was faced with challenges resulting from the widely dispersed team members (making it difficult to meet), and a very tight time frame imposed by the Committee. As a result of our efforts, the streamlining process is well under way and we've reduced logistics timeframes by 17% overall, with further improvements anticipated in the future as more best practices are employed.

CF Cooperation and Teamwork was displayed by the commendation received by the members of the streamlining team from the Steering Committee.

CF Communication was demonstrated by the requirement for me to present findings to the Steering Committee, comprised of high-ranking officers and executives from different departments. I was complimented for the accuracy and succinctness of my briefing.

Rating Official Assessment

Mr. Newton was our chief representative for the best practices initiative for logistics streamlining. He did a great job in meeting with contractors and representatives from other components and made this office look good. This objective is on track for successful completion during this rating cycle.

CF Cooperation and Teamwork was displayed by Mr. Newton's coordination of this project with the other team members.

CF Communication was demonstrated by his constant work with both the team and the office staff.

Character limit: 2000

Counter

(Limit to 2000 characters)

Counter 525

Save and Return to Top of Page

When done, select
<Save and Return to Top of Page>
(or scroll up)

Select Job Objective 2

Job Objectives

Select	Number	Job Objective Title	Status	Weights % (Optional)
<input type="radio"/>	1	Program review and analysis	APPROVED	40
<input checked="" type="radio"/>	2	Evaluation and inspection	APPROVED	30
<input type="radio"/>	3	Industrial property software	APPROVED	30

Job Objective

As required, participate in evaluation and inspection teams and study groups formed to evaluate logistics readiness support to units and activities. Based on inspections, review and studies, prepares and submits detailed analyses and/or reports with technical evaluation and recommendations for policy, process, and procedural change (reviewed by supervisor for quality, accuracy, and completion) within supervisor established suspense date.

Employee Self Assessment

I participated in two teams to evaluate logistics readiness at this installation, one in the supply department and one in the maintenance department. For both the studies I prepared the final reports containing our findings, obtained team concurrence on the conclusions, and submitted them to the management within the time frames established.

CF Resource Management was above average in that the results of our team's work included sound recommendations that will improve logistical readiness and at the same time demonstrate fiscal responsibility.

...then review **employee's self-assessment** for job objective #2 here...

Rating Official Assessment

...and enter your **supervisory assessment** for job objective #2 here.

Continue until you have reviewed and added your assessments for all objectives.

Don't forget to **SAVE**

Rating Official: Initiate Higher Level Review process

Create/Update Interim Review

[Return To Interim Reviews Tab](#)

Employee Information

Employee Name **Newton, Vasiliki**

[▶ Show Employee Details](#)

Interim Review Initiator **Wattenberg, Britteny**

Interim Review Status **Initiated**

Interim Review Number **2**

Assessments

Approvals and Acknowledgments

Select "Approvals and Acknowledgments" tab

Assessments

Approvals and Acknowledgments

Approvals and Acknowledgments

[Need Help?](#)

This screen provides information regarding the status of your employee's Interim Review.

Select 'Show' to see the detailed information about the status of your employee's Interim Review.

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

Details	Tasks	Status	Action
▶ Show	Step 1: Rating Official - Request or Document Higher Level Review (If Required). NOTE: If not required, go to Step 3.	Not Started	<input type="button" value="Start"/>
▶ Show	Step 2: Higher Level Reviewer - Review (If Required)	Not Started	Step 1 must be completed
▶ Show	Step 3: Rating Official - Document Communication to Employee	Not Started	<input type="button" value="Start"/>
▶ Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

Select <Start >

Higher Level Review (HLR) of official Interim Reviews

- **Option A:** Transfer the plan to the higher level reviewer, – or –
- **Option B:** Document that the higher level review has taken place without actually transferring the plan (*requires signature of HLR on hardcopy DD Form 2906*)
 - Either option can be done for multiple employees at once (*see slide 6*)

Option A - Transfer to Higher Level Reviewer (HLR)

Name	Title
Wattenberg, Britteny	Rating Official
Arqueta, Floyd C	Higher Level Reviewer

Change Higher Level Reviewer:

Buttons:

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

Higher Level Reviewer: Method of Review:
Review Date: Other Method:

Step	Status	Action
Step 1: Review	Not Started	<input type="button" value="Start"/>
Step 2: Higher Level Reviewer - Review (If Required)	Not Started	Step 1 must be completed
Step 3: Rating Official - Document Communication to Employee	Not Started	<input type="button" value="Start"/>
Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

Option A: Select one of the Transfer options (with or without email notification) – see next slide

In either option, if this is not the right HLR name, replace it with the right HLR name – enter some or all of the last name and select the flashlight

Option B: Enter review date and method of review, then select <Save>

Rating Official: Transfer Interim for HLR

Option A - Transfer to Higher Level Reviewer (HLR)

Name	Title
Wattenberg, Britteny	Rating Official
Arqueta, Floyd C	Higher Level Reviewer

Change Higher Level Reviewer 

Message to Higher Level Reviewer

Option A, continued: Enter your email message and select <Transfer to HLR>

 **Performance Appraisal Application (PAA)**
Version 3.0

[ICE MyBiz](#) [ICE PAA V2](#) [ICE PAA V3](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

Information

The interim review has been transferred to the Higher Level Reviewer.

Transfer verified, select <OK>



Higher Level Reviewer Actions

- Review interim review assessments
- Approve the interim review, or return it for changes

HLR Actions: Review Interim Review Assessments

Navigator

- My Biz
- My Workplace**

My Workplace

- All Actions Awaiting Your Attention
- Performance Appraisal Application (PAA)**
- My Employee Information
- Update My Information
- Apply Action(s) to Multiple Employees (PAA)

NSPS Performance Management Reports

- View/Print Performance Management Reports
- View Previous Requests

Favorites Edit Favorites

After using your browser to access DCPDS, close all of your browser windows and restart a new browser session. Sometimes the browser will not hold that information in memory (e.g. some web sites keep users to...

2. Select Performance Appraisal Application (PAA)

1. Select My Workplace

New! (ICE) replaces My Biz Suggestions

Plans/Appraisals In Progress

Show Me Appraisal Year

Table Size

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Arqueta, Floyd C	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim Pending HLR Approval	Update <input type="button" value="Go"/>
Nolda, Deangelo	Wattenberg, Britteny	Wattenberg, Britteny	2010	32538	15-Dec-2008	NSPS	Approved	Closeout Completed	View <input type="button" value="Go"/>
Michelotti, Ermie U	Berrones, Pete	Berrones, Pete	2010	32550	08-Oct-2008	NSPS	Approved	Interim in Progress	View <input type="button" value="Go"/>

3. Note Current PAA Status is "Interim Pending HLR Approval"

4. Make sure Action shows "Update," then select <Go>

Create New Plan

HLR Actions: Review Interim Review Assessments

NSPS PAA - Higher Level Reviewer Track Progress Return to Main Page

Employee Information
 Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

1. Select the "Interim Reviews" tab

Plan Interim Reviews Annual Appraisal Other Assessments Reports/Forms

Plan Details Mission Goals Job Objectives Component Unique (Optional) Approvals and Acknowledgments

Plan Details
 This screen provides information about the status of your employee's performance plan. Since you are in view mode you cannot make changes. [Need Help?](#)

Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	16-Oct-2008
Appraisal Period Start Date	01-Oct-2008	Plan Last Modified	
Appraisal Period End Date	30-Sep-2009	Created By	Wattenberg, Britteny
Appraisal Effective Date	01-Jan-2010		
Rating Official Name	Wattenberg, Britteny		
Higher Level Reviewer Name	Arqueta, Floyd C		

NEXT>

NSPS PAA - Higher Level Reviewer Track Progress Return to Main Page

Employee Information
 Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

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

Interim Reviews
 This screen provides information about your employee's Interim Review. [Need Help?](#)

- To view a pending Interim Review, select the 'Update' button.
- To view a completed Interim Review, select the 'View History' button.

2. Select <Update>

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
2	Wattenberg, Britteny	26-Feb-2009		Initiated				Update	

HLR Actions: Review Interim Review Assessments

Assessments Approvals and Acknowledgments

Assessments

This screen allows you to view your employee's Job Objective and self-assessment, and to type or copy and paste your evaluation. Use the appropriate Performance Indicator and Contributing Factor benchmark descriptors to write your assessment.

- Select the 'Radio' button next to the Job Objective you want to evaluate.
- Once you have completed your assessment for each Job Objective, select the 'Approvals and Acknowledgements' button to begin the approvals process.

Important Note: If you transfer to the employee after you have entered your assessment and before the approvals process has been completed, your employee will be able to view your assessment.

[Need Help?](#)

Job Objectives

Select	Number	Job Objective Title	Status	Weights % (Optional)
<input checked="" type="radio"/>	1	Program review and analysis	APPROVED	40
<input type="radio"/>	2	Evaluation and inspection	APPROVED	30
<input type="radio"/>	3	Industrial property software	APPROVED	30

Job Objective

Accomplish the review, analysis and evaluation of current or projected industrial property programs in accordance with established timelines and applicable laws, regulations, agreements and policies (as it relates to specific program). Coordinate with representatives of other installations, other components, and DoD agencies in developing, monitoring and evaluating joint industrial property programs. Based on these reviews and analysis, complete program enhancements in a timely manner per published component guidance.

Radio buttons control what job objective is displayed

HLR reviews Employee's self-assessment and Rating Official's assessment one job objective at a time by selecting the radio button for each one—doing so displays that job objective its respective assessment blocks

HLR Actions: Review Interim Review Assessments

Employee Self Assessment

During this rating cycle, I worked on the best practices initiative for logistics streamlining. I met with contractors and representatives from other components and we reviewed current best practices documentation and developed our own set of best practices for consideration by the Logistics Steering Committee. The Committee approved all the recommendations and commended the team for a good job. The initiative was faced with challenges resulting from the widely dispersed team members (making it difficult to meet), and a very tight time frame imposed by the Committee. As a result of our efforts, the streamlining process is well under way and we've reduced logistics timeframes by 17% overall, with further improvements anticipated in the future as more best practices are employed.

CF Cooperation and Teamwork was displayed by the commendation received by the members of the streamlining team from the Steering Committee.

CF Communication was demonstrated by the requirement for me to present findings to the Steering Committee, comprised of high-ranking officers and executives from different departments. I was complimented for the accuracy and succinctness of my briefing.

Review Employee's self-assessment for this objective

Rating Official Assessment

Mr. Newton was our chief representative for the best practices initiative for logistics streamlining. He did a great job in meeting with contractors and representatives from other components and made this office look good. This objective is on track for successful completion during this rating cycle.

CF Cooperation and Teamwork was displayed by Mr. Newton's coordination of this project with the other team members.

CF Communication was demonstrated by his constant work with both the team and the office staff.

Review Rating Official's assessment

(Limit to 2000 characters)

Counter 525

Save and Return to Top of Page

When done, select
<Save and Return to Top of Page button>
(or scroll up) & select the next job objective

HLR Actions: Review Interim Review Assessments

- The HLR can either approve the assessment or return the Interim Review assessment to the Rating Official for changes (**the HLR cannot make changes**).

Assessments Approvals and Acknowledgments

Approvals and Acknowledgments

[Need Help?](#)

This screen provides information regarding the status of your employee's Interim Review.

If the 'Approve' or 'Return for Change' button is active under Step 2, select it to complete the process.

[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)	Pending Approval	<input type="button" value="Approve"/> or <input type="button" value="Return for Change"/>
▶ Show	Step 3: Rating Official - Document Communication to Employee	Not Started	Step 2 must be completed
▶ Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

1. Select <Approve> or <Return>

2. Select <Transfer>

Higher Level Reviewer Notification to Rating Official - Wattenberg, Britteny

Note: Rating officials that have not an email address registered in My Biz cannot receive email notification; therefore, transfer without and contact the RO.

[Need Help?](#)

g Official without E-mail Notification to complete this task.

3. Select <Yes> if you approve the Interim Review

Information

Do you wish to approve the Interim Review for Newton, Vasiliki?



Rating Official Actions

- Document Interim Review conversation with employee
- Obtain or document the employee's acknowledgment

RO Actions: Document Interim Review conversation

- This step is done whether you using Option A or Option B to document Higher Level Review.
- Log into My Workplace and PAA as before, starting at the main page:

1. Note current status is
"Interim Review Approved by HLR"

Plans/Appraisals In Progress

Show Me Appraisal Year

Table Size

Create New Plan

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Wattenberg, Britteny	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim Review Approved by HLR	<input type="button" value="Update"/> <input type="button" value="Go"/>
Nolda, Deangelo	Wattenberg, Britteny	Wattenberg, Britteny	2010	32538	15-Dec-2008	NSPS	Approved	Closeout Completed	<input type="button" value="Update"/> <input type="button" value="Go"/>

2. Ensure Action shows
"Update," then select <Go>

RO Actions: Document Interim Review conversation

NSPS PAA - Higher Level Reviewer

Track Progress Return to Main Page

Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

1. Select the "Interim Reviews" tab

Plan Interim Reviews Annual Appraisal Other Assessments Reports/Forms

Plan Details Mission Goals Job Objectives Component Unique (Optional) Approvals and Acknowledgments

Plan Details

This screen provides information about the status of your employee's performance plan. Since you are in view mode you cannot make changes. [Need Help?](#)

Appraisal Type	Annual Appraisal - NSPS	Performance Plan Approval Date	16-Oct-2008
Appraisal Period Start Date	01-Oct-2008	Plan Last Modified	
Appraisal Period End Date	30-Sep-2009	Created By	Wattenberg, Britteny
Appraisal Effective Date	01-Jan-2010		
Rating Official Name	Wattenberg, Britteny		
Higher Level Reviewer Name	Arqueta, Floyd C		

NEXT>

Create/Update Interim Review

Return To Interim Reviews Tab

Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

Interim Review Initiator **Wattenberg, Britteny** Interim Review Number **2**
Interim Review Status **Initiated**

2. Select "Approvals and Acknowledgments" tab

Assessments Approvals and Acknowledgments

RO Actions: Document Interim Review conversation

Assessments **Approvals and Acknowledgments**

Approvals and Acknowledgments

This screen provides information regarding the status of your employee's Interim Review.

Select 'Show' to see the detailed information about the status of your employee's Interim Review.

Show All Details | Hide All Details

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document Higher Level Review (If Required). NOTE: If not required, go to Step 3.	Completed	Start
Show	Step 2: Higher Level Reviewer - Review (If Required)	Completed	Start
Show	Step 3: Rating Official - Document Communication to Employee	Not Started	Start
Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

1. Select <Start>

Show All Details | Hide All Details

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document Higher Level Review (If Required). NOTE	Completed	Start
Show	Step 2: Higher Level Reviewer - Review (If Required)	Completed	Start
Hide	Step 3: Rating Official - Document Communication to Employee	Not Started	Start

Communication Date 

Communication Method 

Other Method

[Save and Transfer to Employee for Acknowledgement](#) [Save and go to Step 4](#)

Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed
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2. Enter communication date & method

3. Select appropriate option*

2 Options of documenting employee receipt:

- Transfer the plan to the employee for them to acknowledge, **-OR-**
- Document that they receive the interim review without transferring the plan <Save and go to Step 4>

If transferring the plan to the employee, the email notification message is automatically prepared and tells the employee what to do:

Select <Transfer to Employee with email notification>

Rating Official Notification to Employee - Newton, Vasiliki

Cancel

Transfer to Employee without E-mail Notification

Transfer to Employee with E-mail Notification

[Need Help?](#)

Message To Employee

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

Please go to the Performance Appraisal Application and select the Interim Review tab and then the Approvals and Acknowledgments tab and complete Step 4. Once you have acknowledged, a copy of the DD Form 2906 will be available in the Completed Plans/Appraisals area of the Performance Appraisal Application Main Page.

Notice: You are about to contact Newton, Vasiliki 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 Employee without E-mail Notification

Transfer to Employee with E-mail Notification

Confirmation message

Confirmation

The appraisal has been submitted to the employee.

RO Actions: Document Interim Review conversation

If documenting employee receipt without transferring the plan*:

Assessments Approvals and Acknowledgments

Approvals and Acknowledgments

This screen provides information regarding the status of your employee's Interim Review.

Select 'Show' to see the detailed information about the status of your employee's Interim Review.

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

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document Higher Level Review (If Required). NOTE: If not required, go to Step 3.	Completed	<input type="button" value="Start"/>
Show	Step 2: Higher Level Reviewer - Review (If Required)	Completed	<input type="button" value="Start"/>
Show	Step 3: Rating Official - Document Communication to Employee	Completed	<input type="button" value="Start"/>
Show	Step 4: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	<input type="button" value="Start"/>

Select <Start>

* This method would normally be used if the employee is unavailable (e.g., TDY, on leave, etc.), or refuses to acknowledge the Interim Review.

RO Actions: Document Interim Review conversation

▼ Hide Step 4: Rating Official - Document Employee Acknowledgment Pending Empl Acknowledgment Start

✓ TIP These fields are auto-populated at the time of employee acknowledgment. If the employee is not available or refuses to acknowledge, you may update this area accordingly.

Acknowledgement
Other Method
Date

1. Complete the **Acknowledgement** ("Other" requires entering the actual method) and date

2. Enter Date

3. Select <Save>

Save

Create Interim Review

Number	Created By	Creation Date	Higher Level Review Date	Status	Communication Date	Communication Method	Employee Ack Date	Action	Delete
2	Wattenberg, Britteny	26-Feb-2009	02-Mar-2009	Completed	04-Mar-2009	Face to Face	04-Mar-2009	View History	

Status of this Interim Review is now "Completed"

Upon completion, a "snapshot" of the performance plan with the Interim Review is available under the [Show Completed Plans/Appraisals](#) link on the PAA main page (available to both Employee and the Rating Official).



Employee Actions

- Acknowledge Interim Review after Rating Official completes action

Employee: Acknowledging Interim Review

1. Log into My Biz
2. Select Performance Appraisal Application (PAA)
3. Select Performance Appraisal Application (*see slide 11*)

Starting at the main page:

2. Make sure action reads "Update" and select <Go>

Appraisals of Newton, Vasiliki

Create New Plan

--Choose a Plan Type--

Table Size 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Newton, Vasiliki	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim in Progress	Update <input type="button" value="Go"/>

1. Note status: "Interim in Progress"

Employee: Acknowledging Interim Review

NSPS PAA

Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

1. Select "Interim Reviews" tab

Transfer to Rating Official | Track Progress | Return to Main Page

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

Plan Details | Mission Goals | Job Objectives | Component Unique (Optional) | Approvals and Acknowledgments

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

2. Select <Update>

04-Mar-2009	05-Mar-2009	Pending Empl Acknowledgment	05-Mar-2009	Face to Face	<input type="button" value="Update"/>	
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Employee Information
Employee Name **Newton, Vasiliki**
[Show Employee Details](#)

3. Select "Approvals and Acknowledgments" tab

Interim Review Initiator
Interim Review Status: Pending Empl Acknowledgment

Interim Review Number

Assessments | Approvals and Acknowledgments

Employee: Acknowledging Interim Review

Assessments **Approvals and Acknowledgments**

Approvals and Acknowledgments

This screen provides information regarding the status of your Interim Review.
If the 'Acknowledge Receipt' button is active under Step 4, select it to complete the acknowledgment process.

Select 'Show' to see detailed information about the status of your Interim Review.

[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	<input type="button" value="Acknowledge Receipt"/>

1. Select
<Acknowledge Receipt >

Appraisals of Newton, Vasiliki

Create New Plan

--Choose a Plan Type--

Go

Table Size 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
Newton, Vasiliki	Newton, Vasiliki	Wattenberg, Britteny	2010	32536	16-Oct-2008	NSPS	Approved	Interim in Progress	<input type="button" value="Update"/>

Select the link to search for completed plans.

[▶ Show Completed Plans/Appraisals](#)

2. A "snapshot" of your appraisal with the Interim Review information is now available under the **Show Completed Plans/Appraisals** link on your PAA main page



***The Pay Pool Advisor is available at
DSN 354-6932 to assist you.***