West Virginia National Guard
Human Resources Office
Bulletin

Bulletin Number: 18-02	Date: 22 October 2018

Applicability: WVNG Activity Heads and HR Remotes who have Permanent/Indefinite Technician Responsibilities

MyPerformance Implementation

Subject: New Performance Appraisal (PA) System and Implementation

References: TPR 430 dated 5 November 2009

Effective Date: Immediately

Use: This bulletin provides basic guidance to supervisors and managers to ensure a seamless transition due to changes to the PA system.

Introduction and Background: NGB notified the field that MyPerformance was coming on line during FY 17. Training via DCS was made available to HRO personnel in late March 2017. Notification to the field was delayed due to final review of the new program. MyPerformance will replace what has been previously known as Performance Appraisal Application (PAA.) Very few system changes will be noticed by the field because the system will be accessed via MyBiz+ however the greatest impacts will be the transition of the rating period, reduction in the number of levels of ratings, reduction of the minimum observation period, and the eventual loss of access to PAA.

Overview: The implementation of MyPerformance will put all indefinite and permanent technician personnel on the new rating period of 1 April through 31 March. As always, three (3) performance discussions are required but more are always recommended. There will now be a three-level rating pattern of Outstanding-5, Fully Successful-3 and Unacceptable-1. There will be a minimum observation period of 90 calendar days. The recommendation remains of one to ten job objectives using the SMART (Specific, Measurable, Aligned, Realistic/Relevant, Timed) method. Training will be required by all supervisors of technicians. Initial and refresher training are available through GKO and the HRO website. (This instruction does not pertain to temporary technicians because they are not required to complete PAs.)

Immediate Action: All indefinite and permanent technician personnel must copy their completed PAs to avoid losing their files. There is a chance data could be lost in this transition so it is imperative to copy and save the old information. All technician personnel must have all due/overdue PAs completed and new FY 19 plans created in the new system. If the plan/appraisal was created in the old system for FY 18, complete it immediately. If the plan has not been created for FY 18 (or older) PAs, create the plan in the new system immediately. ALL FY 19 PAs will be created in the new system and be dated from 1 Oct 18 through 31 Mar 19 (unless the technician is already on the new rating period, 1 Apr through 31 Mar.) An early closeout will be completed for the period of 1 Oct 18 through 31 Mar 19 to ensure all personnel are migrated to the new rating

period cycle. Upon completion of the FY 19 closeout, the 2020 PA will be initiated with the new dates of 1 Apr 19 through 31 Mar 20 and an effective date of 1 Jun 20. Note: When actively working within the PAA or MyPerformance systems, NEVER select "Close" because that option deletes the PA.

Summary of Changes:

	Old System	New System
PA	NG (Title 32)	**DoD Performance Management Appraisal Program**
PA Cycle	1 October-30 September	**1 April-31 March**
PA Effective Date	1 October	**1 June**
Rating Pattern	5 – Outstanding 4 – Excellent 3 – Fully Successful 2 – Marginal 1 – Unacceptable	**5 – Outstanding** **3 – Fully Successful** **1 – Unacceptable**
Observation Period	Minimum of 120 days	**Minimum of 90 days**

Instructions:
All employees/supervisors must copy old PA information (i.e. to Word document or save in its entirety as a pdf) to have it available when using the new system. The old and new systems cannot be open at the same time. The new system does not have capabilities to pull from old system (i.e. you cannot copy from the existing plan.) It is unknown how long the old system will remain available for copying previous PAs. The old system will be shut down in the very near future.

All personnel who are not on the new rating period must have an early closeout completed for period 1 Oct 18-31 Mar 19. The PA often gives error messages regarding the dates but you can continue to proceed through the approval process. For any Plans already created with the old rating period (1 Oct-30 Sep) in the new system, ROs/HLRs can go in and manually update the dates to reflect the early closeout period (1 Oct 18-31 Mar 19.) For any FY 19 Plans started in the old system, all information must be immediately completed in the new system to avoid loss of data. Also, ROs need to ensure the Job Objective dates fall within the dates of the rating period.

Recommendation: It is highly encouraged any remaining overdue PAs are finished appropriately, and then the early closeouts are initiated to ensure no gaps in the PA history of the technician's performance.

IF....	THEN....
The technician's last completed PA ended on 30 Sep 18	A new FY 19 plan needs created in the new system, dated 1 Oct 18-31 Mar 19 with an effective date of 1 Jun 19
A technician was not employed/observed for 90 days or more (i.e. since 2 Jul 18) by the current supervisor during the last rating period (FY 18)	A plan needs initiated from his/her start/conversion date (i.e. 2 Jul 18) to 31 Mar 19 with an effective date of 1 Jun 19
If the technician's FY 18 (or older) PA is currently overdue	Complete the technician's PAs in the new system. Then, complete the technician's closeout PA (for FY 19, dated 1 Oct 18-31 Mar 19 with an effective date of 1 Jun 19)
The new technician is on a probationary period	The new technician will not receive an official PA (documented in the system) until the technician reaches the appropriate end of the probationary period (i.e. one or three years)

Training: Initial and refresher training are available through GKO and the HRO website.
- GKO - https://gko.portal.ng.mil/joint/J1/D06/MyPerformance/Forms/AllItems.aspx?RootFolder=%2Fjoint%2FJ1%2FD06%2FMyPerformance%2FMyPerformance%20Training&FolderCTID=0x012000A7B3185A93763E4E81C3365A2612635C&View=%7B80C22537%2D70C5%2D45F9%2D95F1%2D94B66859696F%7D
- HRO website - http://www.wv.ng.mil/HRO/ Under Supervisor Toolbox, Performance Management

Initial – Required when you have not completed any PAs in the old system; Lessons 1-7 must be completed.

Refresher – Required when you have completed at least one PA in the old system; Lessons 3 and 6 are recommended for refresher training.

Once training is complete, individuals will forward their training certificates to HRO (MSgt Meredith A. Gray.) This training will be tracked by NGB.

The points of contact are the HRS-IS at (304) 561-6427 for questions regarding navigation and system questions and the Employee Relations Specialist at (304) 561-6429 for questions regarding the specific PA do's and don'ts.

KELLY D. AMBROSE
LTC, JA, WVARNG
Human Resource Officer/SJA

Attachments:
- MyBiz+ and MyPerformance - Overview and Information
- PAs – Using the "New" MyPerformance System
- PAs – How to Copy the Old PA and Start the New

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--- MyBiz+ and MyPerformance ---
Overview and Information
As of 9 October 2018

Background: DCPDS feeds information in to MyBiz+. Therefore, the DCPDS hierarchy drives the MyBiz+ team view/org chart. For hierarchy changes, contact HRO, Classification.

Access:
- There are many troubleshooting steps to obtain access, depending on where you are in the process: If you/your subordinate have <u>never</u> accessed MyBiz+ or are uncertain of your access status, try these steps:
  - Go to https://compo.dcpds.cpms.osd.mil/.
  - Select the green button, "Smart Card Log In," when prompted for your CAC certificate, <u>always</u> select the non-email (ID) certificate; if you see the purple and yellow boxes, select the purple box and you will select ok on the Privacy Act Statement; if you do not see the boxes continue following these steps
  - Select the "Register" hyperlink below the green smart card log in button; when prompted to enter your SSN/ID number, <u>always</u> enter your SSN <u>with</u> dashes; if you see the purple and yellow boxes, select the purple box and you will select ok on the Privacy Act Statement; if you do not see the boxes continue following these steps
  - (This is also used after you've obtained a new CAC) Select the "Re-register" hyperlink below the green smart card log in button; when prompted to enter your SSN/ID number, <u>always</u> enter your SSN <u>with</u> dashes; if you see the purple and yellow boxes, select the purple box and you will select ok on the Privacy Act Statement; if you do not see the boxes, contact HRO, Information Systems.

Supervisors' Info: If you can log in to MyBiz+ but do not see the "My Team" icon at the very bottom right of your screen, contact HRO, Information Systems. This may be a problem with a setting in DCPDS. If the issue is an incorrect hierarchy structure, you may be directed to HRO, Classification.

Hierarchy Issues: As a supervisor, if you look at your MyTeam organizational structure and do not see your subordinates, you need to contact Classification (W. Riblett and B. Willard) to help correct any errors. Ideally, you send a copy of an updated organizational chart to clarify your command structure.

Helpful Hints & Reminders:
- PAA is a system designed for technicians. AGRs will be granted access if they supervise Technicians.
  - FOR AGRs:
    - Again this system is designed for technicians. If you are an AGR who supervises technicians, contact HRO, Information Systems, to have your account updated so you can have visibility of your technicians.
    - If you are an AGR who has previously been a technician, contact HRO, Information Systems, and your accounts will be associated to ensure visibility of your technicians.
- Temporary technicians may appear under your MyTeam view, but they do not require annual Performance Appraisals (PAs.)

Key Changes:

	Old System	New System
PA	NG (Title 32)	**DoD Performance Management Appraisal Program**
PA Cycle	1 October-30 September	**1 April-31 March**
PA Effective Date	1 October	**1 June**
Rating Pattern	5 – Outstanding 4 – Excellent 3 – Fully Successful 2 – Marginal 1 – Unacceptable	**5 – Outstanding 3 – Fully Successful 1 – Unacceptable**
Observation Period	Minimum of 120 days	**Minimum of 90 days**

- **If you have supervised/been supervised over 90 days, you need an appraisal every year.**
    - If you have a new technician in your section starting 1 January, for example, since you will not supervise them for >90 days in the new rating period, their PA for the next rating period will be dated 1 Jan 19-31 Mar 20.
    - If you are losing a technician from your section mid-rating period, i.e. in November, you <u>should</u> do a close out PA for that technician...as long as you have observed them for >90.
- There are special situations where dates may vary. Refer to TPR 430 for more detailed information.

Common Questions/Issues:
- When you try to search for a name (i.e. rating official, HLR, etc.), start typing the "last name, first" and give it a couple of seconds and a list of names should populate, verify you are selecting the right person, and click on their name from the dropdown list, then select Find. If you have to search for another person immediately following your first search, select clear, and then repeat the steps above.
    - If the person has a suffix (i.e. Jr., II, etc.) sometimes you'll need to enter the name to search as "Smith, Jr, M", other times as "Smith Jr, M", etc.
- *<u>Never</u> "Close" a PA; this is almost like deleting it; if you do accidentally "Close" it, contact HRO, Information Systems.
- *You can copy an existing plan from a previous year and use/change the job objectives. NOTE: You cannot access both systems at the same time, i.e. you cannot copy from the old (NG Title 32) to the new (DoD Performance Management Appraisal Program) system.
- *The technician <u>or</u> the supervisor can initiate the plan.
- *Don't panic if you cannot see completed PA's...from the performance main page, scroll down slightly and select the "Show Completed Plans/Appraisals" hyperlink.

Basic flow of a PA:
    - The Plan is completed first. The Interim Review is completed next. (This is a recommended step but it is an optional step.) Finally, the Appraisal is completed. Be sure you work from the respective tab. A tab for each type of action will appear on the top row of your screen. For example, if you are working on a Plan, select the plan tab and then progress through the subtabs to complete all of the steps.
- Always review the main screen to ensure you have ownership of the PA before you try to take action on it. If you do not have ownership of the PA, you cannot make changes to it.
- One of the most helpful screens is the Track Progress screen. You can see where the PA has been and where it has left to go before completion.
    - The PA is not considered 100% complete until after the HLR reviews/approves it and transfers it back to the employee for acknowledgement.
- If you are working on a PA from a previous rating period, be certain to check the prepopulated dates when you work on the start, end and effective dates of the PA and each Job Objective. All dates prepopulate to the current FY. If dates do not coincide with the rating period of the PA you are working on, a date error will appear and prevent approval.
- It is highly recommended you complete all comments (Self-Assessment, Rater, etc.) in a word document to prevent the potential loss of information while working in MyPerformance, and copy the comments from Word into MyPerformance.
- If the page times out or you receive an error, select the back arrow and then try to proceed again.
- The HRS-IS can help with changes/mistakes to a certain point. Once the HLR approves it, the HRS-IS must contact the NGB helpdesk for assistance to have it reset.
- There is a step by step guide accessible through the "Need help?" hyperlink at the top of the MyPerformance main page.

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HRO CONTACT INFORMATION
Technician Hotline – 304-561-6749
AGR Hotline – 304-561-6679

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<h1 style="text-align:center">--- Performance Appraisals ---</h1>
<h1 style="text-align:center">Quick Steps for Using the "New" My Performance System</h1>

As of 9 October 2018

- **Step 1:**
    - ALL technicians <u>must</u> print/save their own PAs for short <u>and</u> long-term reference;
    - Whomever initiates the new PA (i.e. technician or Rating Official) prints or saves* the technician's last completed PA. *Saving the last completed PA is recommended for copying and pasting information.*

- **Step 2:**
    - The technician or the Rating Official initiates the new PA, selecting **DoD Performance Management Appraisal Program** option under Create New Plan (<u>instead</u> of NG Title 32.) Selecting this option pushes you into the new system.

- **Step 3:**
    - All FY 18 PAs are currently due and should be routed/completed as appropriate.

- **Step 4:**
    - ALL "FY" 19 PAs **must** transition technician to the <u>new</u> rating period which ends on 31 March of each year. Therefore, all "FY" 19 PAs must:
        - 1) be created in the "new" system and
        - 2) have the start/end dates reflected as 1 Oct 18-31 Mar 19 with an effective date of 1 June 19.

- NOTES:
    - The "old" system, NG Title 32, will be deleted and inaccessible in the very near future and **NO** PAs will be accessible when the old system is deleted.
    - ALL technicians will be migrated to the new rating period of 1 April through 31 March and will use the "new" system, DoD Performance Management Appraisal Program, for ALL current and future PAs.
    - While in the "new" system, you will not have access to anything in the "old" system.

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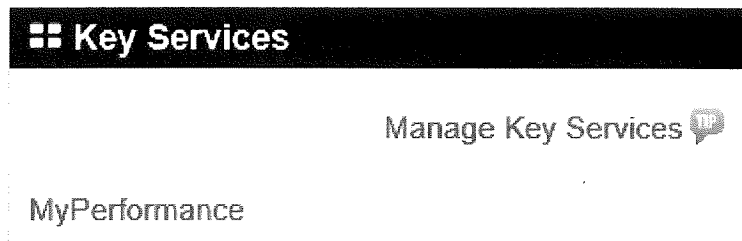
--- Performance Appraisals ---
Quick Steps for How to Copy the Old PA and Start the New
As of 9 October 2018

WEBSITE: MyBiz+, https://compo.dcpds.cpms.osd.mil/

Step 1: Print/save all previous PAs.
- Select MyPerformance under Key Services (for your <u>own</u> appraisal)

:: Key Services

Manage Key Services

MyPerformance

- Select Show Completed Plans/Appraisals from the MyPerformance Main Page:

Select the link to search for completed plans.
▶ Show Completed Plans/Appraisals

- Select NG Performance Evaluation from the dropdown menu and select Find:

Appraisal Year [∨]

Event NG Performance Evaluation [∨]

Find   Clear

- o **Do NOT click anything else (Be patient, this will take a minute or so to populate.)**
- o **Leave the year blank to pull all completed PAs.**

- **Double-click the printer icon located to the right of each Appraisal Year and print/save/copy your completed PAs.**

Records Displayed 25 ∨ | ⌗ ⟳ ▣ ⚙ ▾ ▥

Appraisal Year △	Appraisal ID	Type △	Event △	Event Completion Date △	Reports/Forms
2013	339312	NG	NG Performance Evaluation	27-Jul-2013	🖨
2014	500681	NG	NG Performance Evaluation	30-Sep-2014	🖨
2015	650393	NG	NG Performance Evaluation	30-Sep-2015	🖨
2016	805853	NG	NG Performance Evaluation	30-Sep-2016	🖨
2017	934965	NG	NG Performance Evaluation	31-Mar-2017	🖨
2018	1027889	NG	NG Performance Evaluation	31-Mar-2018	🖨🖨

Step 2: Create Plan in new system.
- From the MyPerformance Main Page, select DoD Performance Management Appraisal Program from the Create New Plan dropdown and Go.

Create New Plan

DoD Performance Management Appraisal Program ▼   Go

Appraisal Type	Annual Appraisal - DoD	
* Appraisal Period Start Date	01-Apr-2018	📅
	(dd-mmm-yyyy)	
* Appraisal Period End Date	31-Mar-2019	📅
	(dd-mmm-yyyy)	
* Appraisal Effective Date	01-Jun-2019 ✕	📅
	(dd-mmm-yyyy)	
Rating Official Name	Toby, Helen C	
Higher Level Reviewer	AMBROSE, KELLY D	

- Type the last name, first name and WAIT a few seconds to select the correct name from the dropdown menu. ***If the RO or HLR is a II or Jr the format may be last name, II, first name.

* Rating Official Name	| 🔍
* Higher Level Reviewer Name	🔍

- If this is your first time using the DoD Performance Management Appraisal Program, you will not be able to copy from an existing plan, you must select Build New Plan.

Build New Plan

- If you are in the same position title and pay grade as your last completed PA, you can select Build New Plan, pull up a copy of your last completed PA (ie .pdf, .doc, etc) and copy and paste information from the old plan into the new, updating objectives as necessary. If your position title and pay grade have changed, you will need to ensure your Job Objectives are updated to match your Position Description.

Plan   View/Print Form

Step 1: Plan Details   Step 2: Mission Goals   Step 3: Performance Elements and Standards   Step 4: Approvals and Acknowledgments

-- Choose an Action --   ▼   Go

Employee Information

- Progress through the steps of building the Plan, complete the Interim Review (as appropriate) and then the Appraisal.