

Quick Guide to Submitting Recommended Ratings of Record In the Performance Appraisal Application (PAA), version 2

Rating Official

Task: Transfer Appraisal to Employee (if employee has ownership, skip this step, employee begins with next step).

1. Begin at the *Performance Appraisal Application Main Page*.
 2. Select the pencil icon in the Update column next to the employee's name to view the *Rating Official Review* page.
 3. Select the Transfer to Employee button.
 4. Select the Transfer to Employee button on the *Rating Official Notification to Employee* page.
 5. Continue working from the PAA Main Page, or select Logout at the top right side of the page to exit.
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Employee

Task: Enter self-assessment for the annual appraisal.

1. Begin at the *Performance Appraisal Application Main Page*.
 2. Select the pencil icon under the Update column to view the *Update Performance Plan: Overview* page.
 3. Scroll down to the **Employee Self-Assessment for Annual Appraisal** field and enter your information (type in, or copy and paste from another document).
 4. Select the **Save** button to receive confirmation your information was saved and remain on the *Update Performance Plan: Overview* page.
 5. Select the Transfer to Rating Official button.
 6. Select the Transfer to Rating Official button on the *Share Appraisal Details with Rating Official* page.
 7. Select Logout at the top right side of the page to exit.
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Rating Official

Task: Review employee self-assessment, assign job objective ratings, enter supervisory assessment, and transfer to Higher Level Reviewer (or document higher level review).

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the employee's name to view the *Rating Official Review* page.
3. Select the **Update Plan/Appraisal** button to view the *Update Plan/Appraisal* page.
4. Select the pencil icon in the Update column of the first Job Objective to view the *Update Job Objective* page.
5. Scroll down to the **Job Objective Rating** field and select the blue down arrow inside the right side of the field.
6. Select the applicable rating from the dropdown list.
7. Select the blue down arrow inside the right side of the **Contributing Factor Impact** field and select a +1, 0 (neutral), or -1 based on the contributing factor impact.
8. Select the **Save and Update Another** button to save your updates and repeat steps 5 through 7 for the remaining job objectives.
9. When you have completed the last objective, select the **Save and Return to Update Page** button to save your updates and view the *Update Plan/Appraisal* page.
10. Scroll to Rating of Record and Assessment on the *Update Plan/Appraisal* page.
11. Enter text in the **Rating Official Assessment** field (type in, or copy and paste from another document).
12. Select the **Save and Continue** button to view the *Rating Official Review* page.
13. Select the **Submit Recommended Ratings** button to view the *Submit Recommended Ratings: Rating Official* page.
14. Scroll down to Rating of Record and Assessment.
15. Select the blue down arrow inside the right side of the **Shares** field, if applicable.
16. Select your recommended share (dependent on the recommended rating).
17. Enter the **Salary Increase %**, if applicable. The **Bonus %** will calculate automatically.
18. Select the **Next** button to view the *Give Recommended Ratings: Review* page.

19. Select the **Submit to HLR** button to view the *Submit Recommended Ratings to Higher Level Reviewer* page.

20. There are two options for higher level review. If the Higher Level Reviewer name is blank or incorrect, follow next section before proceeding.

Option A: Transfer the appraisal to the Higher Level Reviewer in the PAA:

20A-1. Select the **Transfer to HLR** button.

20A-2. Select the **Yes** button on the Information screen.

The Higher Level Reviewer approves or returns the recommendation (next section).

Option B: Document that the higher level review has taken place:

20B-1. Enter the date and method of the HLR review.

20B-2. Select the **Save** button.

21. Select **Logout** at the top right side of the page to exit.

Rating Official - Change Higher Level Reviewer

Change the higher level reviewer name if it is blank or incorrect.

1A. Using Option A (to transfer the appraisal to the Higher Level Reviewer), enter the name of the higher level reviewer (last name - comma - first name) in the Change Higher Level Reviewer block, then select the flashlight icon.

1B. Using Option B (document that the higher level review has been done), enter the name of the higher level reviewer (last name - comma - first name) in the Approver block.

2. On the Search and Select: Change Higher Level Reviewer page, select the Quick Select icon next to the correct higher level reviewer.

3. Return to step 20, above.

Higher Level Reviewer

Task: Review recommended rating, approve or return for changes (if the rating official documented higher level reviewer approval, you will not do this step).

1. Begin at the *Performance Appraisal Application Main Page*.
 2. Select the blue down arrow at the right side of the Show Me field.
 3. Select HLR Appraisals to view only Performance Plans/Appraisals awaiting your action as a Higher Level Reviewer.
 4. Select the pencil icon in the Update column next to the employee's name to view the *Details: Higher Level Reviewer (HLR) for Final Ratings* page.
 5. Select the **Approve** button to view the *Confirmation* page, or the **Return for Correction** button to return the appraisal to the rating official for changes.
 6. Select the **Yes** button to transfer the recommended rating to the Pay Pool Manager (PPM) or Rating Official per your selection.
 7. Select **Logout** at the top right side of the page to exit.
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Rating Official

If the higher level reviewer has returned the appraisal to you without approving it, repeat the Rating Official steps above.

When the recommendation process is successfully completed, the appraisal should show "PPM" as the Current Owner, with Appraisal Status of "Pending PPM Approval."