SWD Quick Start Guide for Supervisors:

CREATE A NEW PERFORMANCE PLAN

Introduction and Audience

This quick start guide provides step by step instructions for creating a new performance plan in the Performance Appraisal Application (PAA) which is the electronic support tool provided for this purpose and is to be used in creating a performance plan for those employees/supervisors converted to NSPS for the new rating year beginning on 21 Jan 07.

For more information, help, and problems

A. The comprehensive PAA User Guide from CPMS is located at:
http://www.swf.usace.army.mil/swd-cpac/NSPS/PerfAppraisalResources/PAAUserguide.pdf

This guide contains thorough coverage of some of the primary tasks in the PAA and is particularly useful in identifying the overall appraisal process.

B. If you have problems with your login please submit a password reset request for your account though the following link:
http://swf-fs2ftwhr.swf.ds.usace.army.mil/MODERN/Account/ResetPassword.asp

C. If you can login but your access is not correct (supervisors showing wrong employees, etc.), please send an email to Chris Trego or Laverne Scruggs identifying the problem you are encountering. If you see employees who have not yet been converted to NSPS **DO NOT** create a performance appraisal for them using the PAA tool.

We will work hierarchy issues on an ongoing basis, that is, assuring that you are able to see your employees in the automated system. Accordingly, let us know those employees you are able to see who are not yours as well as those employees you supervise who are not shown. Right now the important issue is to verify that you can see your employees who are currently under NSPS; we will correct the view for your non-NSPS employees at a later date.

Accessing the Performance Appraisal Application (PAA)

You can access the PAA by clicking on the following link:
https://pyxis.chrcs.army.mil:8007/OA_HTML/US/ICXINDEX.htm

If you have an existing DCPDS account, login with those credentials.

If you do not have a DCPDS account, you will use your SSN with dashes as your username along with a default password constructed from the following (Note, your password should be 10 characters in length.):

Upper case first and second letters of first name
Dollar Sign
Lower case first and second letters of last name
Dollar Sign
4th Character of SSN
Dollar Sign
5th Character of SSN
Dollar Sign

EXAMPLE: For user John Smith, his user name is his SSN with dashes, "123-45-6789", and his default password would be "JOsm4$5$".

If you encounter problems with accessing the system, please submit a request to have your password reset through the following link:
http://swf-fs2ftwhr.swf.ds.usace.army.mil/MODERN/Account/ResetPassword.asp

It is recommended that you first draft the job objective information in a text file and then cut and paste into the applicable blocks in the PAA tool so you will not be timed-out by the tool. The alternative is to type the information directly into the blocks in the PAA tool (though you risk losing information if you choose to do this).

Caution on Pasting from Microsoft Word

Some keyboard characters that are recognized in Word cannot be used in the PAA tool (you can only use straight text within MyWorkplace/MyBiz). These include but are not limited to quotation marks (" "), long dashes (–), pictorial bullets (however, you can use a star * for bullets). Also be aware that some formatting characters can cause problems (no bolding, highlighting, underlining, italicizing, or other font formats can be used).

The workaround:

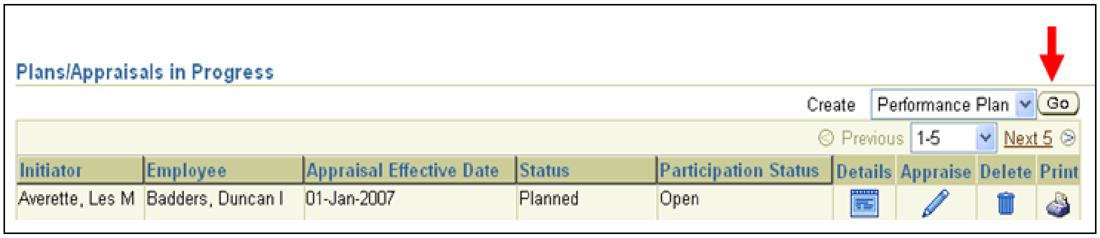
If you are copying text from a Word document, after you paste it into the block on the appraisal form, click the <***Save and Continue***> button. This saves your work and leaves you on the same screen to continue working, but it will also identify any of these unacceptable characters by replacing them with small boxes as shown in the example below (color added for emphasis):

> "These include □ quotation marks □, long dashes □, pictorial bullets □. Also some formatting characters can cause problems."

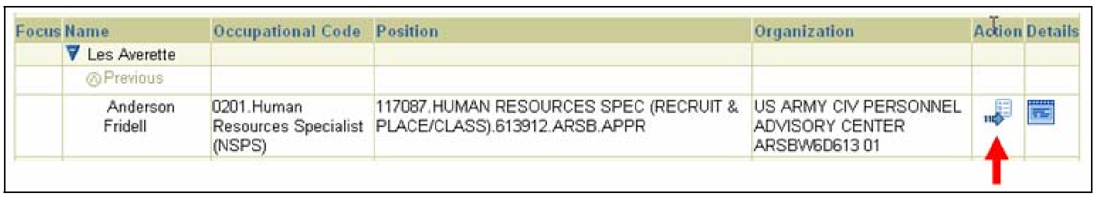
You should go back to the section, remove the bad characters and replace them with the textual versions (plain quotes, hyphen, apostrophe, etc.).

Creating a New Performance Plan

<table>
<tr><th>Step 1</th><th>Action</th></tr>
<tr><td>1A.</td><td>From the “Performance Management as Rating Official screen (displayed when you log into NSPS Appraisals (My Workplace)), click the <<i>Go</i>> button next to Create Performance Plan:



</td></tr>
<tr><td>1B.</td><td>This brings up a list of your employees. Find the one for whom you are going to create the plan, and click the “action” icon:



If an employee is missing from your list, or there are employees on the list who are not yours, there is a problem with the self-service hierarchy and you need to contact Chris Trego or Laverne Scruggs by email.</td></tr>
<tr><td>1C.</td><td>Complete setup details as follows (use the calendar icons for all date changes, or enter the dates exactly as shown) (illustration on next page):

• Appraisal Type: Annual Appraisal
• Rating Cycle Start Date: 21 Jan 07
• Rating Cycle End Date: 30-Sep-2007
• Performance Plan Approval Date: leave blank
• Performance Plan End Date: 30-Sep-2007
• Appraisal Effective Date: 01-Jan-2008 (be sure to use THIS date only!)</td></tr>
</table>

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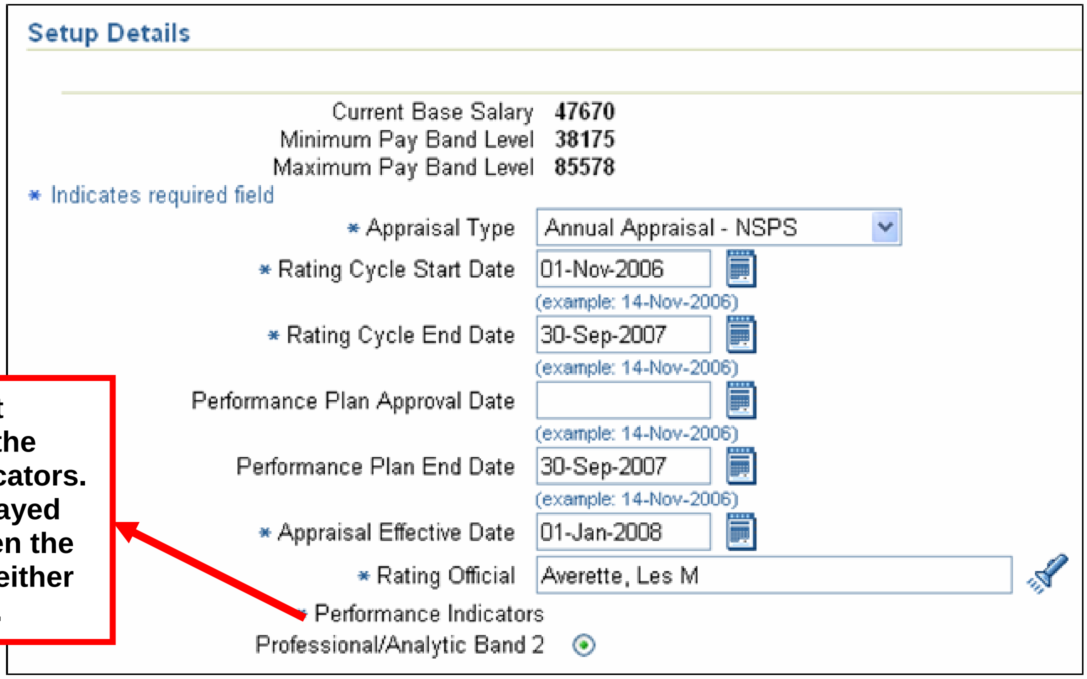
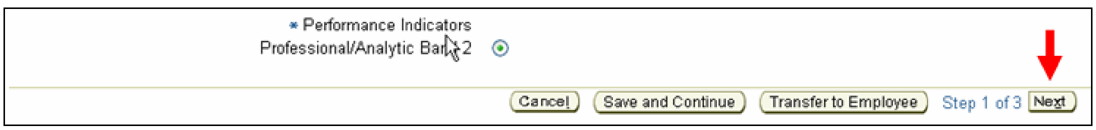
<tr><td>1C, con't</td><td>


Note: You are not required to input the Performance Indicators. They will be displayed automatically when the appraisal form is either printed or viewed.
</td></tr>
<tr><td>1D.</td><td>Click the <<i>Next</i>> button to go to step 2:


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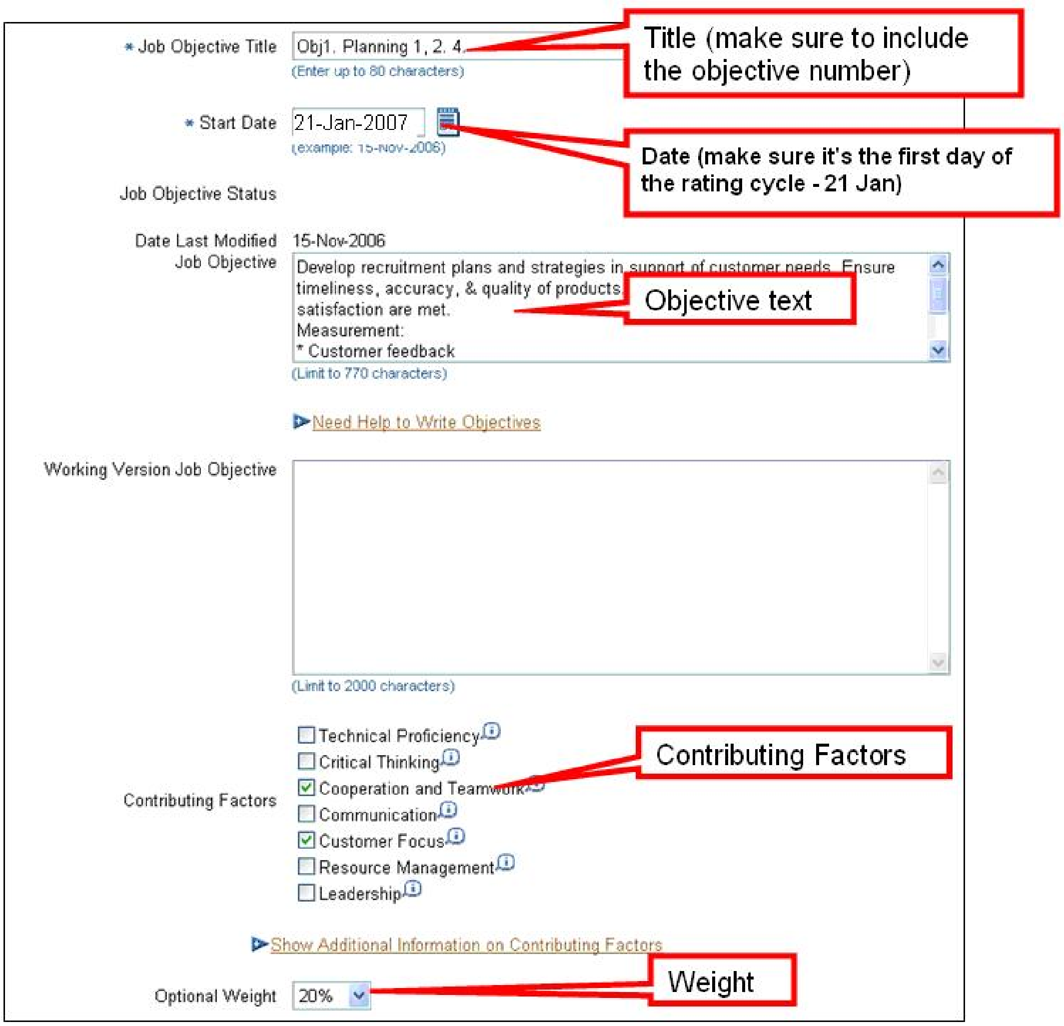
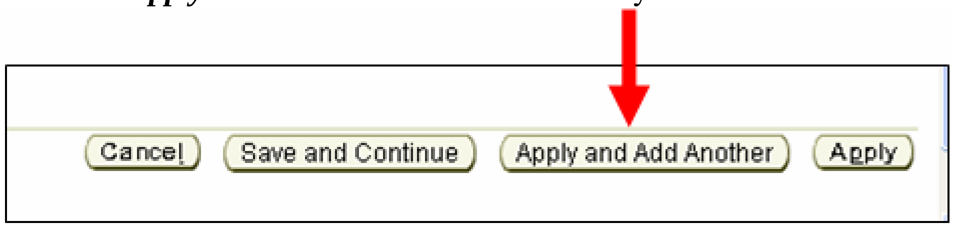
</table>

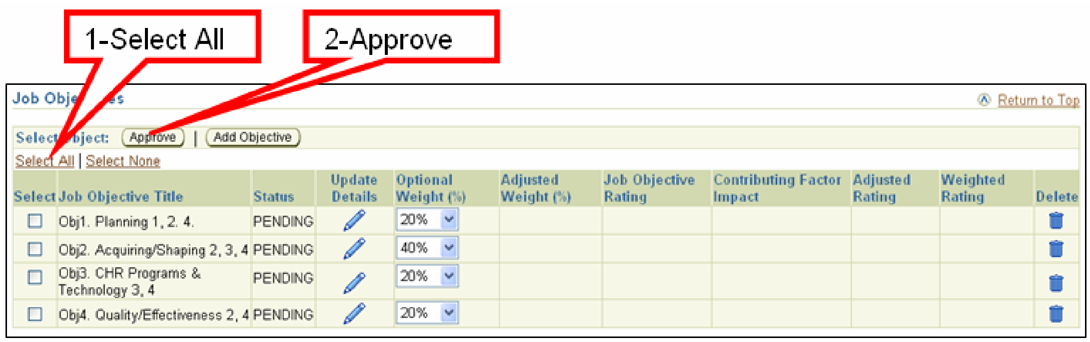
Adding Organizational Goals and Job Objectives

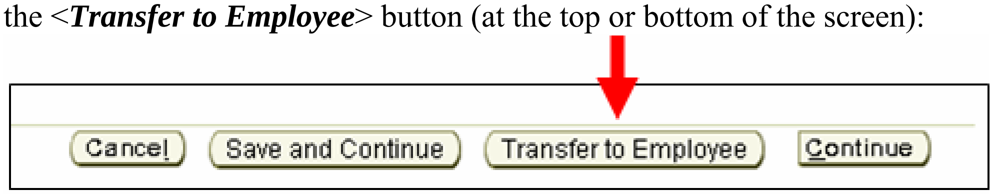
<table>
<tr><th>Step 2</th><th>Action</th></tr>
<tr><td>2A.</td><td>Enter your organization's goals into "Relevant Organizational Mission/Strategic Goals." Your organization will provide your mission/strategic goals.</td></tr>
<tr><td>2B.</td><td>Click the <Add Objective> button:


</td></tr>
</table>

2C.	Complete the "Add Job Objective" screen as follows (see illustration below): • **Title**: Must be entered first. Be sure you include the objective number (Obj1, Obj2, etc.) – the tool sorts alphabetically by title, so this insures that the objectives print in the correct sequence. • **Start Date**: Make sure this reflects the starting date of the rating cycle (**21 Jan 2007** this year) (unless you are creating a plan for a new employee who started after this date) – **watch out, this sometimes reverts back to the current date**. • **Objective Text**: Cut and paste from your WORD file (note that you are limited to 770 characters per job objective). • **Contributing Factors**: Select the applicable contributing factors. • **Weight**: Enter what you have chosen to be the weight of the objective.
	Completed objective: 

<table>
<tr><td>2D.</td><td>Click the <<i>Apply and Add Another</i>> button when you are done with that objective.


</td></tr>
<tr><td>2E.</td><td>Repeat steps 2B-2D for each objective. When you are finished adding job objectives, click the <<i>Apply</i>> button.</td></tr>
<tr><td>2F.</td><td>The job objectives area should look similar to the example in the next block. Notice that the objectives are all in “Pending” status. Also make sure that the percentages add up to 100%.</td></tr>
<tr><td>2G.</td><td>You can now approve the objectives. Click the “Select All” link above the job objectives, then click the <<i>Approve</i>> button. All the objectives will then be in “Approved” status.


</td></tr>
<tr><td>2H.</td><td>You can now transfer the performance plan to the employee (they need to acknowledge the plan before you can approve the overall plan). Begin by clicking the <<i>Transfer to Employee</i>> button (at the top or bottom of the screen):


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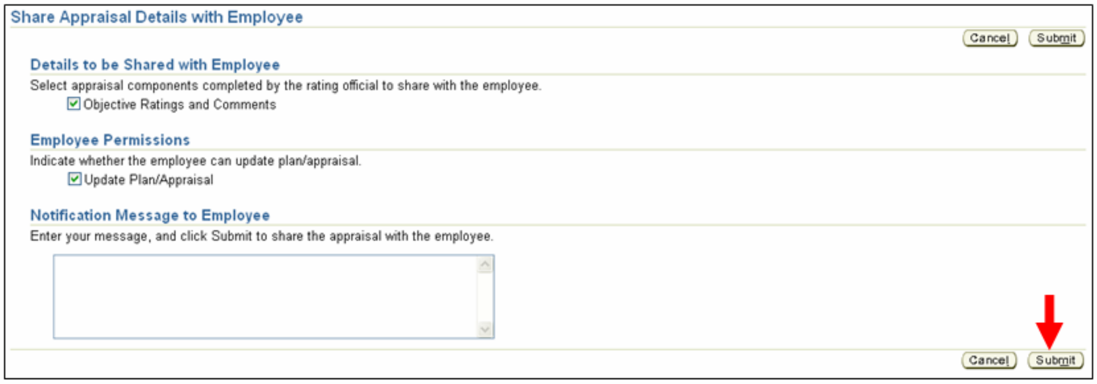
<tr>
<td>2I.</td>
<td>The following screen displays. Do not change the default check marks (see notes below). Add a message to the employee if desired, and click the <<i>Submit</i>> button:


Note:
• Details to be Shared with Employee: Leave this box checked. If you un-check it, the employee will not be able to view the job objectives.
• Employee Permissions: Leave this box checked. If you uncheck it, the employee will not be able to do anything with the appraisal (including acknowledging it).
• Notification Message: Although you can put a message in this box, it will only show up if the employee goes into the “notifications” area of the appraisal.</td>
</tr>
<tr>
<td>2J.</td>
<td>After transferring the appraisal to the employee you are returned to the “Performance Management as Rating Official” screen. There will be a confirmation message that the appraisal was transferred, and the pencil icon for that employee will be grayed out.

There is an automatic email notification to the employee that the appraisal has been transferred; it may or may not be working. You may want to follow up with an email of your own, asking the employee to acknowledge receipt of the plan, and return it to you. Also at this time, you should schedule and conduct the performance plan discussion with the employee.</td>
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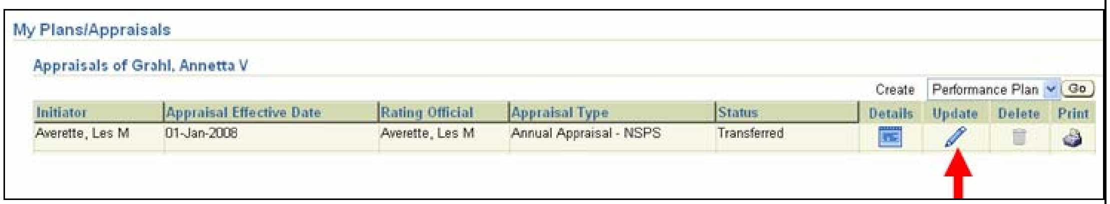
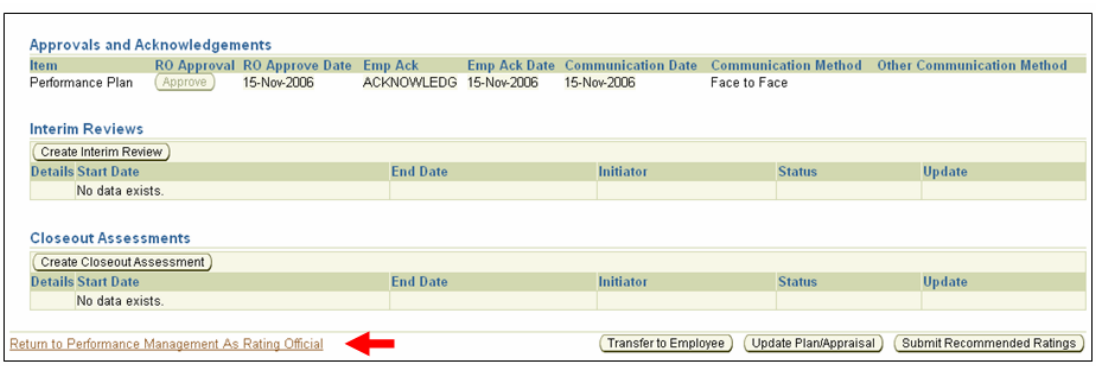
Approving the Performance Plan

After the employee has received the new performance plan from you, and has acknowledged receipt and returned it to you (and you have conducted the performance planning conversation with the employee) you can complete the plan by approving it. Follow these steps:

<table>
<tr><th>Step 3</th><th>Action</th></tr>
<tr><td>3A.</td><td>From the “Performance Management as Rating Official” screen, click the blue pencil icon to open the appraisal of the employee who has acknowledged the plan.

</td></tr>
<tr><td>3B.</td><td>Scroll down to the Approvals and Acknowledgements section and fill in
• The date you conducted your performance plan conversation with the employee;
• The method (face to face, phone, etc.); and
• Click the <<i>Approve</i>> button.

</td></tr>
<tr><td>3C.</td><td>You are done creating this performance plan. The <<i>Approve</i>> button is now grayed out. At the very bottom of the screen, the “Return to Performance Management as Rating Official” link will take you back to your list of employees, or you can Logout if you are done in the PAA.

</td></tr>
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