



USA Performance®

Manage Performance, Ensure Success

OPM's Performance Management System for Federal Agencies

Abbreviated version for NIH use | October 2018

USA Performance (USAP) is an automated, web-based tool that assists Federal agencies in the implementation of their Senior Executive Service (SES) and non-SES performance management programs and systems. USAP enables agencies to automate their performance appraisal process throughout the entire performance rating cycle. Agencies can develop performance plans, track and monitor employees' performance, provide feedback and ratings, and electronically sign performance plans.

SENIOR EXECUTIVE USER GUIDE FOR RATING OFFICIALS

NIH Administrators

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(CONTROL + CLICK ON LINKS BELOW TO DIRECTLY ACCESS SECTIONS)

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Part 1: General Information

BEFORE YOU BEGIN

- USA Performance currently works with Internet Explorer version 10 and above and Google Chrome version 39 and above.
- Your access to the system will be provided by your [NIH Administrator](#). You will receive two emails from USAPHelp@opm.gov – one with your username and one with your password.
- You must be inside the NIH/HHS firewall or VPN to open the link and see the login page below

Login

Sign In using your PIV card or Email Address and Password

- Access [USA Performance](#)
- Type in your work email address
- Enter the temporary password provided to you in the automated email
- You will be prompted to change your password
- Read and accept the Rules of Behavior. You will be directed to the USA Performance Home page.

The image shows the USA Performance login interface. At the top, there is a logo of the United States Office of Personnel Management (OPM) and the text "USA Performance™ Manage Performance, Ensure Success OPM's Performance Management System for Federal Agencies". Below this, there are two main login options: "Smart Card Login" on the left and "Sign In" on the right. The "Smart Card Login" section features a blue button with the text "Log in with Your Smart Card (Insert Card First)" and an icon of a smart card. A note below it states: "* If PIV is required for your agency, a 24-hour exception may be granted by your agency's USA Performance Agency Administrator." The "Sign In" section has input fields for "Email" and "Password", and buttons for "Sign In" and "Forgot Password". At the bottom of the screen, a message states: "USA Performance supports Internet Explorer versions 10/11 and Google Chrome."

NOTE: Once you initially log into USA Performance with the temporary password, you may try registering and logging in with your PIV card

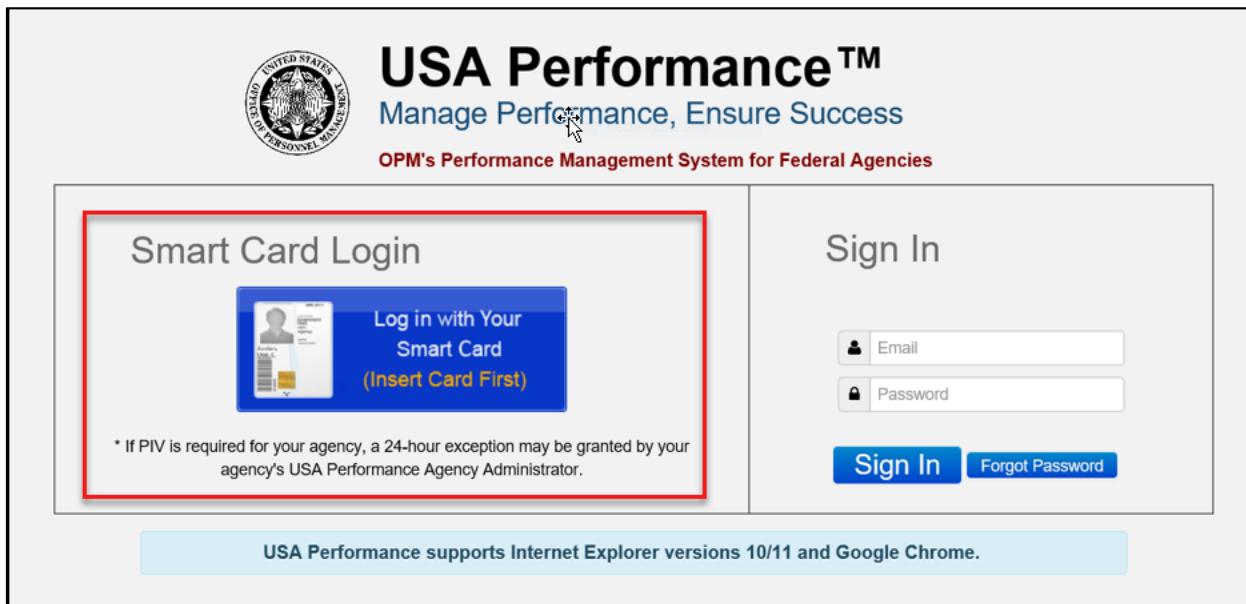
Registering your PIV Card for the first time:

- Access [USA Performance](#)
- Click the "Log in with your Smart Card (Insert Card First)" icon
- Certificates will become available to select
- Select the authentication certificate. Only certificates ending in .8, .12 or .14 will be accepted. Do not select the "signature" certificate (ending in .7). To detect which certificate is correct, perform the following:

- Click on one of the certificates and then click “Click here to view certificate properties.” Scroll down on the “General” tab and you’ll see a string of numbers. Use this to determine if you have the right certificate.
- Enter your PIN
- After your PIN has been accepted, you’ll be able to access USA Performance with your PIV for future logins.

Smart Card Login:

- To access USAP navigate to the [USA Performance](#) site
- Click on the “Log in with your Smart Card (Insert Card First)” icon



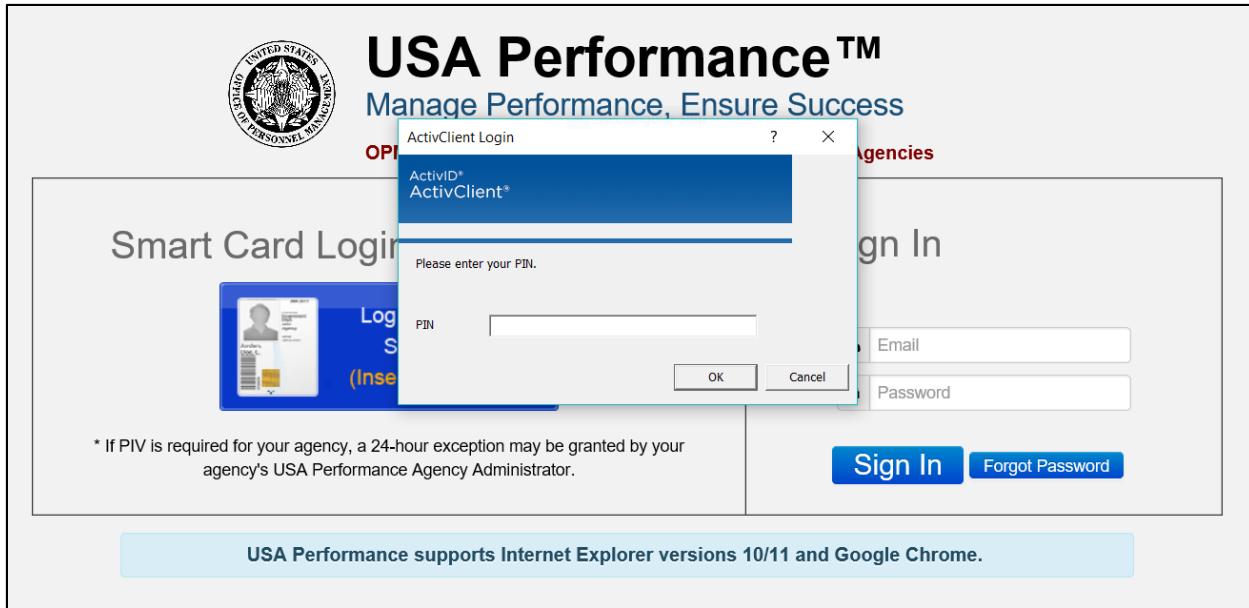
The screenshot shows the USA Performance login page. At the top, there's a logo of the United States Office of Personnel Management. Below it, the text "USA Performance™" and "Manage Performance, Ensure Success". Underneath that, it says "OPM's Performance Management System for Federal Agencies". On the left side, there's a "Smart Card Login" section with a red border around it. It contains a blue button with the text "Log in with Your Smart Card (Insert Card First)". Below this button is a note: "* If PIV is required for your agency, a 24-hour exception may be granted by your agency's USA Performance Agency Administrator." To the right of this section is a "Sign In" form with fields for "Email" and "Password", and buttons for "Sign In" and "Forgot Password". At the bottom of the page, a blue bar states "USA Performance supports Internet Explorer versions 10/11 and Google Chrome."

- Select the authentication certificate



The screenshot shows the USA Performance login page again. The "Smart Card Login" section is visible on the left. A "Confirm Certificate" dialog box is overlaid on the page. The dialog box has a title "Windows Security" and "Confirm Certificate". It displays the following information: "Site usaperformance.opm.gov needs your credentials:", "Authentication - [redacted]", "Issuer: HHS-FPKI-Intermediate-CA-E1", and "Valid From: 9/20/2017 to 3/7/2019". Below this, there's a link "Click here to view certificate properties". At the bottom of the dialog box are "OK" and "Cancel" buttons. The rest of the page is visible behind the dialog, including the "Sign In" form and the support note at the bottom.

- Enter your PIN



- You will be directed to the USA Performance Home page.

Password Requirements:

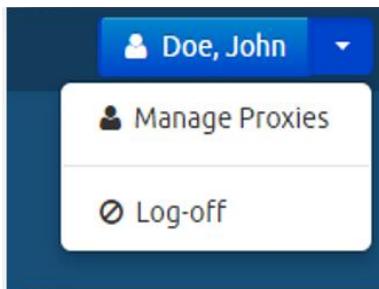
- Your password must be at least eight (8) characters with at least 3 of the following attributes:
 - At least one number 0-9
 - At least one upper-case letter A-Z
 - At least one lower case letter a-z
 - At least one special character !*?
- Passwords expire every 120 days.
- If you forget your password, click Forgot Password on the login page. Check your junk folder for a system generated email with the temporary password.
- If you enter the wrong password three times in a row, your account will be locked for 30 minutes. After 30 minutes, you will be able to access USA Performance with your most current password.

Part 2: System Navigation

Login → Home



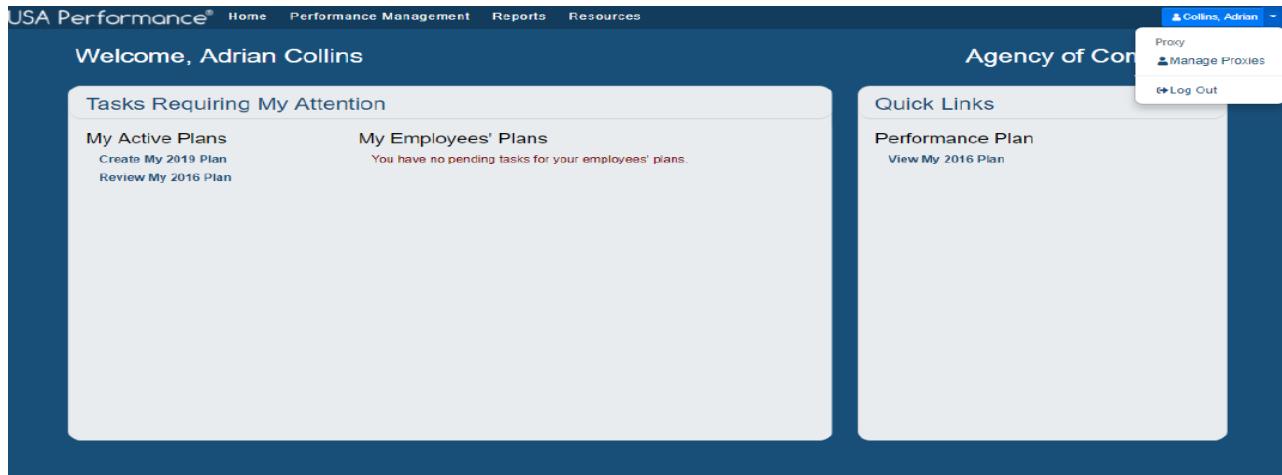
1. Login.
2. **Home** page will display. The navigation bar includes the following tabs:
3. **Home**—This button returns you to the **Home** page where you can see the **Dashboard** of your performance management actions and alerts.
4. **Performance Management**—This button takes you to the Performance Management section of the system, which has three tabs: Planning, Monitoring, and Rating. Each tab enables you to view which employees are at each phase of their performance plans. If you are unable to find an employee within a certain tab, it is likely because they are at a different phase, which requires referencing the other tabs. Within each tab, you can take action on employee performance plans such as viewing or signing the plans. Any necessary action will be indicated for each employee.
5. **Reports**—Allows you to run an **Evaluation Report**.
6. **Resources**—Provides USA Performance resources and reference materials.
7. **User Profile**—Your login name will appear on the user profile dropdown. Click the dropdown to
8. **Manage Proxies** or Logoff.



Dashboard

When you first log in to USAP, you will be taken to the Home/Dashboard page with a Navigation bar at the top of the page with three buttons: *Home*, *Performance Management*, and *Resources*. This Navigation bar appears at the top of every page. In the upper right-hand corner is the user profile dropdown, which can be used to logoff or initiate proxy settings.

The Dashboard enables you to see the status of your performance plan (if applicable) and alerts you of tasks you need to complete. It is organized into two sections: "Tasks Requiring My Attention" and "Quick Links."



Tasks Requiring My Attention: This section provides you with the tasks requiring your attention regarding your performance plan in the system. Under this heading, there is a subheading titled “My Active Plans” that provides links to pending tasks for your plans that are active. There is an additional subheading titled “My Employees’ Plans” that shows pending tasks for your employees’ plans.

Quick Links: This section has a subheading titled “Performance Plan” with quick links to prior years’ performance plans.

System Email Notifications

When certain tasks requiring user action are generated on the Dashboard, it triggers a notification email detailing what needs to be done. Email notification will be sent for the following actions:

- Rating Official: Create plan when cycle is released
- Executive: Sign plan after Rating Official signs Part 1
- Reviewing Official: Sign for progress review, if required for Part 2, after Rating Official signs
- Executive: Sign for progress review after Rating Official signs Part 2
- Rating Official: Review Self-Accomplishment Narrative after Executive releases it
- Reviewing Official (if required): Review the Initial Summary Rating after the Rating Official signs Part 3
- Executive: Sign for rating after the Rating Official or Reviewing Official signs Part 3
- Executives: When plan is signed by Appointing Authority

Sample Email Notification

Action: Review Executive Self-Accomplishment Narratives in USA Performance

You have a new task in USA Performance. Log in to USA Performance to review the executive self-accomplishment narratives as the Rating Official for Haverford, Tom.

Part 3: The Planning Phase

Create a Performance Plan

1. To create a performance plan, begin on the Home/Dashboard page.
2. In the **Tasks Requiring My Attention** section, look under My Active Plans.
3. Select **Create My 2019 Plan**.

NOTE: You can also create a performance plan by selecting **Performance Management** in the navigation bar and clicking **Create Plan** in the Action column.

The screenshot shows the USA Performance dashboard. At the top, there's a navigation bar with links for Home, Performance Management, Reports, and Resources. Below that, a welcome message says "Welcome, Adrian Collins". Underneath, there's a section titled "Tasks Requiring My Attention". This section is divided into two main parts: "My Active Plans" and "My Employees' Plans". In the "My Active Plans" section, there are two buttons: "Create My 2019 Plan" (which is circled in red) and "Review My 2016 Plan". The "My Employees' Plans" section has a message stating "You have no pending tasks for your employees' plans."

Creating a performance plan allows you to take the following actions:

- ✓ Enter appraisal period dates
- ✓ Add additional text to the Critical Elements to include agency-specific requirements
- ✓ Add a performance requirement and provide strategic alignment
- ✓ Edit or remove performance requirements
- ✓ Add supporting documentation
- ✓ Sign plan as an Executive or as Rating Official

Import a Performance Plan from a Previous Year

1. After clicking **Create Plan**, you may see an option to **Import from Previous Plan**. This option will only appear if you had a performance plan in USAP in the previous performance management (PM) cycle.
2. When you select **Create Plan**, a prompt may appear asking if you want to import the data from the previous performance plan.
3. Choose **Yes** or **No**.
4. Selecting **Yes** for this option will copy the contents from **Part 1. Consultation**, any agency-specific requirements for the critical elements, weight settings, and the performance requirements and strategic alignment.

Import from Previous Plan

Do you want to transfer data from the previous evaluation to this new one?

A preview of the transferred evaluation is below.

If you click "Yes", you must Save the evaluation in order to keep the changes.

Yes

No

Navigate the Performance Plan

1. The navigation bar at the top of the performance plan assists you with completing the plan. Items on the navigation bar link to the following actions: **Consultation**, **Progress Review**, **Rating**, **Formula**, **Critical Elements**, **Narratives**, **Documents**, **Notes**, **Save**, and **Print**. An icon with a red circle and a backslash indicates the action is not available at the current phase.



- **Consultation**—This button takes you directly to **Part 1. Consultation** of the performance plan.
- **Progress Review**—This button takes you to **Part 2. Progress Review** of the performance plan.
- **Rating**—This button takes you to the summary rating portion of the performance plan.
- **Formula**—This button takes you to the derivation formula section of the performance plan.
- **Critical Elements**—This button takes you to **Part 5. Critical Elements**, where Executives and Rating Officials can add text or enter critical element weights.
- **Narratives**—This button takes you to **Part 6. Summary Rating Narrative** and **Part 7 Executive's Accomplishment Narrative** where Executives and Rating Officials can complete the narratives for the performance plan.
- **Documents**—This button takes you to the **Employee Documents** section where you can upload additional documents to append to the performance plan.
- **Notes**—This button takes you to the notes section of the performance plan where general notes can be added to the performance plan. If you move your cursor over the **Notes** icon, it will show the last time the notes section was updated.
- **Save**—This button saves any changes made to the performance plan.
- **Print**—This button enables you to print a hard copy of the performance plan.

Enter Appraisal Period Dates

1. The first step in creating a performance plan is to establish the appraisal period.
Establish appraisal period start date--Select the first box next to **Appraisal Pd.** and enter the appraisal starting date in the calendar dropdown.
2. **Establish appraisal period end date**--Select the second box next to **Appraisal Pd.** and enter the appraisal end date in the calendar dropdown.

Part 1. Consultation. I have reviewed this plan and have been consulted on its development.

Executive's Name (Last, First, MI): MORE, THOMAS	Appraisal Pd.: 01/2014					
Executive's Signature:	Date: <input type="button" value="Calendar"/>					
Title:	Organization:					
Rating Official's Name (Last, First, MI):	<input type="checkbox"/> CA					
Rating Official's Signature:	Date: <input type="button" value="Calendar"/>					
October 2014						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Add text to Critical Elements

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6, 7. Narratives Documents Notes Save Print

Critical Element 1. Leading Change Weight 10
(Minimum weight 5%)

Mandatory Performance Requirement: Develops and implements an organizational vision that integrates key organizational and program goals, priorities, values, and other factors. Assesses and adjusts to changing situations, implementing innovative solutions to make organizational improvements, ranging from incremental improvements to major shifts in direction or approach, as appropriate. Balances change and continuity, continually strives to improve service and program performance, creates a work environment that encourages creative thinking, collaboration, and transparency; and maintains program focus, even under adversity.

Agency Specific Performance Requirements:

Agency specific requirements critical element 1

Add text to Critical Elements 1-4

1. For Critical Elements 1-4, agency- specific performance requirements may be added to the standard element language.
2. Place your cursor in the text box under **Agency-Specific Performance Requirements. For NIH SES, SL (Supervisors), and SENIOR-LEVEL TITLE 42 EMPLOYEES—Refer to the current year guidance**
3. Insert the additional text.

- Click **Save** at the top of the page.



TIP: Due to system timeouts, we recommend drafting any narratives in a word processing program and then pasting it into the USAP plan. Typing text does not prevent the system from timing out. If the system times out before you save, you will lose your work. Save your work often!

The screenshot shows the USAP software interface. At the top is a toolbar with various icons: 1. Consultation, 2. Progress Review, 3. Rating, 4. Formula, 5. Critical Elements, 6, 7. Narratives, Documents, Notes, **Save** (which is circled in red), and Print. Below the toolbar, a section titled "Critical Element 2. Leading People" is displayed. It includes a detailed description of the element's purpose and alignment with agency mission. Under "Agency Specific Performance Requirements", there is a box containing text about participation in Employer of Choice activities. The "Weight" field is set to 20%.

Add text to Critical Element 5

- Scroll down the page to **Critical Element 5** and click inside the **Performance Requirement** box to add text.
- Under **Strategic Alignment**, indicate the agency strategic or operational goal to which the requirement is aligned.
- Select **Save** at the top of the page.
- To add an additional performance requirement, select the **Add Performance Requirement** button at the bottom of the page and repeat the steps above.

The screenshot shows the "Critical Element 5. Results Driven" detail view. The "Weight" is set to 20%. The "Performance Requirement" box contains the text: "Improve XMGP grant obligation rate for compliant projects by 7% of FY14 baseline by Sept 1, 2015." The "Strategic Alignment" box contains the text: "agency strategic goal 3.1 Become an expeditionary agency; and XMGP program strategic goal 4.3 Advance Community Resiliency and Sustainability". A red "Delete" button is visible in the top right corner of the alignment box. At the bottom left is a blue button labeled "+ Add Performance Requirement".

Enter Critical Element Weights

1. To enter critical element weights, type a value into each of the **Weight** fields and click **Save**.

- Critical Elements 1-4 have a minimum weight of 5% and a maximum weight of 20%.
- Critical Element 5 has a minimum weight of 20% and a maximum weight of 80%.
- When weighting the performance requirements, the weight must total 100%.

NOTE: Weight Restrictions vary by agency. Reference agency-specific policy to ensure compliance with weight restrictions. **NIH Specific Performance Requirement for ALL SES, SL (Supervisors), and SENIOR-LEVEL TITLE 42 EMPLOYEES are in the current year guidance.**

Critical Element 1: Leading Change (Minimum weight 5%) **Weight 20 %**

Develops and implements an organizational vision that integrates key organizational and program goals, priorities, values, and other factors. Assesses and adjusts to changing situations, implementing innovative solutions to make organizational improvements, ranging from incremental improvements to major shifts in direction or approach, as appropriate. Balances change and continuity, continually strives to improve service and program performance, creates a work environment that encourages creative thinking, collaboration, and transparency, and maintains program focus, even under adversity.

Agency-Specific Performance Requirements:

Develop a strategic plan by August 15, 2015, to streamline processes and improve accuracy and timeliness of the delivery of funds and services to grantees.

Edit a Performance Plan

1. Scroll down to the performance requirement section you wish to edit and click in the **Performance Requirement** or the **Strategic Alignment** fields to edit the text.
2. To delete an entire performance requirement, select the red X box next to the performance requirement you wish to delete. You will only be able to delete an optional performance requirement.
3. Click **Save** at the top of the page.

Sign as a Rating Official

WHEN A PLAN IS COMPLETE, THE RATING OFFICIAL MUST SIGN THE PLAN BEFORE THE EXECUTIVE WILL BE ABLE TO SIGN. **Sign Plan(s)** will be listed in **Tasks Requiring My Attention** on the Dashboard when a plan is awaiting your signature.

Tasks Requiring My Attention

My Active Plans
You have no pending tasks for your plans.

My Employees' Plans
Sign 2016 Plan(s) 1

1. To sign a plan, select **Sign Plan(s)** to open the list of plans that need signatures for that year.
2. Select employee whose plan you want to sign.
3. In Part 1, next to **Rating Official's Name**, select **Sign**.

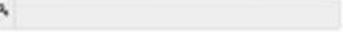
4. Verify that you want to sign the plan by selecting **Yes**, when the prompt appears.

Performance Management - Required Signatures plans for 2016			
Name	Rating Cycle Group	Plan Begin Date	Plan End Date
Collins, Adrian	Fiscal Year Rating Cycle	5/2/2016	8/11/2016
Show 25 entries		Showing 1 to 1 of 1 entries	

Title: Chief

Rating Official's Name (Last, First, MI):

Are you sure you want to sign this Performance Plan?
Have you met with this executive to discuss this Performance Plan?

Rating Official's Signature:  

NOTE: You will not be able to type your name or the date in the boxes. When you select "Yes" to assign the plan, your name and date will automatically appear in the respective boxes.

Sign Your Performance Plan

As a rating Official your tasks includes signing your own plan. Once your Rating Official has signed your plan, you will be able to sign your plan. On the Dashboard, under **Tasks Requiring My Attention**, you will see **Sign My Consultation**.

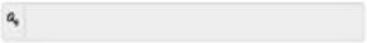
1. To sign the plan, select **Sign Own Plan**.

Tasks Requiring My Attention

My Active Plans
[Review My 2016 Plan](#)
[Sign My 2019 Consultation](#)

My Employees' Plans
You have no pending tasks for your employees' plans.

2. In Part 1, next to the **Executive's Signature**, select **Sign**.
3. When the prompt **Are you sure you want to sign this Performance Plan?** appears, select **Yes**.

Part 1. Consultation. I have reviewed this plan and have been consulted on its development.		
Executive's Name (Last, First, M/I): DRAPER, DON	Appraisal Pd.	10/1/2014 - 9/30/2015
Are you sure you want to sign this Performance Plan?  <input type="button" value="Yes"/> <input type="button" value="No"/>		Date:  _____
Executive's Signature: 	<input type="button" value="Sign"/>	
Title: Director	Organization: Sterling Cooper Draper Price	
Rating Official's Name (Last, First, M/I): STERLING, ROGER	<input checked="" type="checkbox"/> CA	<input type="checkbox"/> NC
Rating Official's Signature: 	Date:  5/26/2015	

NOTE: You will not be able to type your name or the date in the boxes. When you select "Yes" to sign the plan, your name and date will automatically appear in the respective boxes.

Part 4: Monitoring Phase

Progress Review Notes and Signatures

- When logged in as the **Rating Official**, navigate to **Part 2. Progress Reviews** of the Performance Plan to provide progress review notes during the monitoring phase.
- Select the Notes button to add a Note.

The screenshot shows the 'Part 2. Progress Review' screen. At the top right, there is a blue button labeled 'Notes' with a checkmark icon. This button is circled in red. Below it, there are four sections for signatures: 'Executive's Signature' (with a placeholder 'a'), 'Rating Official's Signature' (with a placeholder 'a' and a 'Sign' button), 'Reviewing Official's Signature (Optional)' (with a placeholder 'a'), and a checkbox for 'Request Reviewing Official Signature'. Each signature section has a date field to its right.

- Enter text and click **Save**.

The screenshot shows the 'Progress Review Notes' screen. It displays a note: 'Don is meeting expectations in all Critical Elements. He should continue to create more opportunities to Build Coalitions.' Below this is a text input field with the placeholder 'place text here'. At the bottom, there are three buttons: 'Release this note to the Executive' (checked), 'Save' (blue), 'Save And Close' (blue), and 'Close' (red).

- After the progress review is complete, a **Rating Official** must sign before the **Executive** can sign.

The screenshot shows the 'Part 2. Progress Review' screen. At the top right, there is a blue button labeled 'Notes' with a checkmark icon. This button is circled in red. Below it, there are four sections for signatures: 'Executive's Signature' (with a placeholder 'a'), 'Rating Official's Signature' (with a placeholder 'a' and a 'Sign' button), 'Reviewing Official's Signature (Optional)' (with a placeholder 'a'), and a checkbox for 'Request Reviewing Official Signature'. Each signature section has a date field to its right.

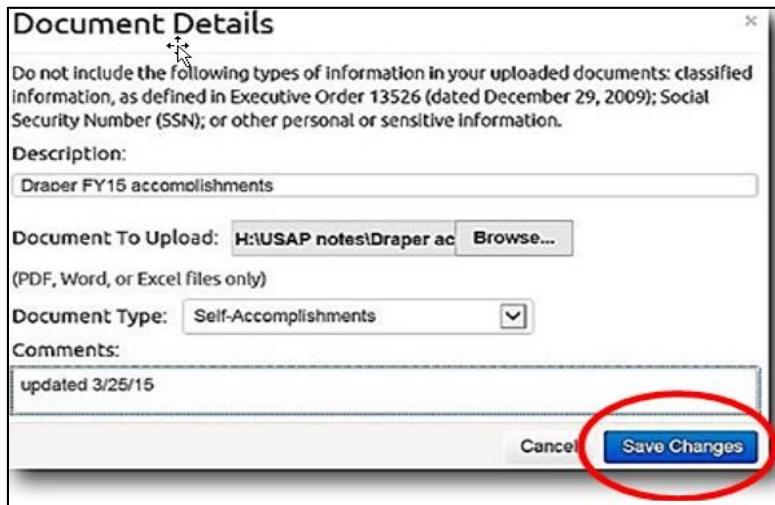
- After the **Rating Official** signs, the **Executive** can sign.

The screenshot shows the 'Part 2. Progress Review' screen. At the top right, there is a blue button labeled 'Notes' with a checkmark icon. This button is circled in red. Below it, there are four sections for signatures: 'Executive's Signature' (with a placeholder 'a' and a 'Sign' button), 'Rating Official's Signature' (with a placeholder 'a' and a note 'Signed by SCHMIDT, LINDA' in the field), 'Reviewing Official's Signature (Optional)' (with a placeholder 'a'), and a checkbox for 'Request Reviewing Official Signature'. Each signature section has a date field to its right.

- Select the **Request Reviewing Official Signature** box to request a higher level review.
- Select **Release this note to the Executive** box if the Rating Official would like the notes to be made available to the Executive.

Adding Supporting Documentation

1. Select **Performance Management** on the navigation bar and click on the individual's name to view an employee's Performance Plan.
2. Click the **Documents** icon at the top of the plan or scroll to the bottom of the page and select **Add Document**.
3. Enter a **Description** (optional).
4. Choose a file to upload by clicking **Browse**.
5. Select a **Document Type** from the dropdown menu (optional).
6. Enter text in the **Comments** textbox (optional).
7. Click **Save Changes**.
 - The details of the uploaded document should be listed in the **Employee Documents** table at the bottom of the page.



8. Click **Delete** in order to remove the document.

Employee Documents					Add Document	Search: <input type="text"/>
File Name	Comments	Updated By	Uploaded Date	Action		
Draper accomplishments.docx		Draper, Don	5/28/2015 2:55:05 PM	Delete		

Part 5: The Rating Phase

The Summary Rating Narrative

The **Summary Rating Narrative** is an overall review of the Executive's performance which must be completed by the Rating Official. To enter the narrative:

1. Click on **Narratives** at the top of the plan.
 2. Enter text into **Part 6. Summary Rating Narrative** textbox.
 3. Select **Save** at the top of the page.
 4. You also have the option to provide commentary in the **Rating Official Narrative** box under each critical element. Upon completion, select **Save** at the top of the page.

Part 6. Summary Rating Narrative (Mandatory)

Assign Ratings

1. To assign a final summary rating as a Rating Official, you must first make ratings for each **Critical Element** and any other additional performance requirements.
 2. Once the performance plan is open, you can navigate to the rating section by selecting the **Rating** icon at the top of the performance plan.
 3. Navigate through each requirement and select a rating of 1-5.
 4. Provide an explanation on the element's rating in the **Rating Official Narrative** text box (optional).

- Click **Save** at the top of the page.

Critical Element 2. Leading People

(Minimum weight 5%) **Weight** 15 **9**

Agency-Specific Performance Requirements:

Engage a substantial number of employees through participation in Employer of Choice activities (e.g. Employee Support, Communication, Work/Life Balance, Trust Building, Teamwork, Performance Based Awards and Advancements, Camaraderie Building, Workplace Pride).

Rating Official Narrative (Optional):

Joan designed and implemented an Employee Engagement program which conducted activities to improve cross-division communication and collaboration, hosted team-building exercises, and began a monthly on-the-spot award program. 89% of the organization's staff has participated in at least one of these activities and employee satisfaction has risen 7% since its implementation.

Critical Element Rating - Leading People

<input type="checkbox"/> Level 5	<input checked="" type="checkbox"/> Level 4	<input type="checkbox"/> Level 3	<input type="checkbox"/> Level 2	<input type="checkbox"/> Level 1
----------------------------------	---	----------------------------------	----------------------------------	----------------------------------

Summary Rating and Signature

- Once ratings are saved for all performance requirements, the system will automatically record those ratings under the Initial column in Part 4. Derivation Formula and Calculation.
- Based on those ratings, the system will calculate and determine the Initial Summary Rating in Part 3.
 - Click **Sign** next to **Rating Official's Signature**.

Part 4. Derivation Formula and Calculation of Annual Summary Rating					
Critical Element	Element Rating		Score		Summary Level Ranges
	Initial	Final (if changed)	Weight	Initial	
Leading Change	3	<input checked="" type="checkbox"/>	20	60	0
Leading People	4	<input checked="" type="checkbox"/>	20	80	0
Business Acumen	3	<input checked="" type="checkbox"/>	20	60	0
Building Coalitions	3	<input checked="" type="checkbox"/>	20	60	0
Results Driven	4	<input checked="" type="checkbox"/>	20	80	0
Totals:			100	340	0

475 - 500 = Level 5
400 - 474 = Level 4
300 - 399 = Level 3
200 - 299 = Level 2
Any CE rated Level 1 = Level 1

Part 3. Summary Rating

Initial Summary Rating	<input type="checkbox"/> Level 5 Outstanding <input type="checkbox"/> Level 4 Exceeds Fully Successful <input checked="" type="checkbox"/> Level 3 Fully Successful <input type="checkbox"/> Level 2 Minimally Satisfactory <input type="checkbox"/> Level 1 Unsatisfactory
Rating Official's Name (Last, First, MI):	
Rating Official's Signature:  <input type="button" value="Sign"/>	Date: <input type="text"/>
Executive's Signature: 	Date: <input type="text"/>
Reviewing Official's Signature (Optional): 	Date: <input type="text"/>

Executive Signature

Once the performance plan has been rated and signed by your Rating Official and the Higher-Level Reviewer (if required), you will have the opportunity to review their ratings and sign the plan under **Part 3. Summary Rating**.

- Prior to signing the plan, you have the option to **Request a Higher-Level Review**.

- Before selecting the **Request a Higher Level Review** checkbox, you should upload a justification to Employee Documents explaining why you disagree with the rating.

Higher Level Review (if applicable)

<input checked="" type="checkbox"/> Request a Higher Level Review	Are you sure? Clicking "Yes" will request a Higher Level Review AND sign your plan. If you want to upload rating response documents before requesting this review, please click "No," upload your documents in the Employee Documents section below, and then sign/request a Higher Level Review. <input type="button" value="Yes"/> <input type="button" value="No"/> Executive's Initials: <input type="text" value="AK"/>
---	--

Print a Performance Plan

- Select the **Performance Management** link from the top navigation bar.
- Select the name of the plan to be viewed.

USA Performance® Home **Performance Management** Reports Resources

Performance Management - All Users

Name	Rating Cycle Group	Plan Begin Date	Plan End Date
Collins, Adrian	Fiscal Year Rating Cycle	5/2/2016	8/11/2016
Collins, Adrian	Fiscal Year Rating Cycle	10/1/2018	9/30/2019

Show 25 entries Showing 1 to 2 of 2 entries

- Select the **Print** icon in the upper right corner.

USA Performance® Home Performance Management Resources

Collins, Adrian

1. Consultation 2. Progress Review 3. Rating 4. Formula 5. Critical Elements 6. 7. Narratives Documents Notes Save Print

I

Part 1. Consultation. I have reviewed this plan and have been consulted on its development. Plan Status: Active

Executive's Name (Last, First, MI): COLLINS, ADRIAN	Appraisal Pd. 5/2/2016 - 8/11/2016
Executive's Signature: <input type="text"/>	Date: <input type="text"/>
Title: Title For Adrian	Organization: Office of Computer Management
Rating Official's Name (Last, First, MI):	<input type="checkbox"/> CA <input type="checkbox"/> NC <input type="checkbox"/> IT/E

4. Select **Report pdf** in the lower left corner.

The screenshot shows the USA Performance software interface. At the top, there's a navigation bar with links like Home, Performance Management, Reports, and Resources. Below the navigation bar, there are several icons labeled 1. Consultation, 2. Progress Review, 3. Rating, 4. Formula, 5. Critical Elements, and 6, 7. Narratives. On the right side of the header, there's a user profile for 'Thorne, Emily' with options to Save and Print. The main content area is titled 'Part 1. Consultation. I have reviewed this plan and have been consulted on its development.' It contains fields for Executive's Name (THORNE, EMILY), Executive's Signature, Title, Organization, Rating Official's Name, Rating Official's Signature, Date, and checkboxes for CA, NC, and LT/LE. Below this is a section for 'Critical Element 1. Leading Change' with a weight of 20%. A detailed description of the mandatory performance requirement follows. At the bottom left, there's a red circle around the 'Report (23).pdf' button.

5. Select the **Print** icon in the upper right corner.

The screenshot shows a printed evaluation document titled 'SES Printed Evaluation' at the top. It includes a page number '1 / 4'. The document content is identical to the report shown in the previous screenshot, including the 'Part 1. Consultation' section and the 'Critical Element 1. Leading Change' section. On the right side of the document, there are several small circular icons: a magnifying glass, a printer, a plus sign, a minus sign, and a double arrow. The 'printer' icon is highlighted with a red circle.

PART 6: Evaluation Reports

Login → Home → Reports

Generate Evaluation Reports

Throughout the performance plan cycle, as a Rating Official and/or Reviewing Official, you can check on the status of the performance plans for each employee (SES or Non-SES) for which you are responsible. The report displays the status of employee performance plans within an individual or all organizations and divisions for a chosen fiscal year. Further, you can choose to look at performance plans in all phases, or for only the planning, monitoring, or rating phase.

1. To generate a Performance Plans Progress Report, select the **Reports** link.
2. **Click** Performance Plans Progress Report.
3. Select the fiscal year from the **Rating Cycle FY** dropdown list.
4. Select Planning, Monitoring, Rating, or Select All from the **Phase(s)** list.
5. Select the organization(s) from the **Organization(s)** list.
6. Select the division(s) from the **Divisions(s)** list.
7. **Click Generate Report.**

PART 7: USAP HELP DESK SUPPORT

Login → Home → Resources

Request USAP Help Desk Support

For further questions, contact your designated IC liaison at <https://hr.nih.gov/hr-systems/usa-performance/usa-performance-ic-proxies>.

1. Click **Email Helpdesk**.
2. You can also email the Helpdesk directly at USAPerformance@opm.gov.

