

## How to Modify a Plan to Obtain or Document HLR Approval

Once a performance plan has been “Approved”, if the HLR did not approve the plan, or the RO did not document the HLR’s approval, then the RO can modify the plan which will enable the RO to go through the approval process again and either obtain or document the HLR’s approval. Follow the steps listed below to accomplish this.

From the RO’s main MyPerformance screen, the RO would open the employee’s performance plan by clicking the <Go> button next to “Update” on the drop down menu

**MyPerformance**

MyBiz+ | Help | Logout

MyPerformance Main Page | Provide Guest Feedback | My Journal

Employee

MyPerformance Main Page

Need Help?

**Warning:** This application is designed 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 Neall, Barbara

Create New Plan

--Choose a Plan Type-- [Go]

Records Displayed: 10 [Refresh] [Settings]

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
Neall, Barbara	Neall, Barbara	Canniff, Sharon A	2018	356	01-Dec-2016	DoD	Approved	Plan Approved	Update [Go]

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

Privacy Statement

1. Navigate to the “Step 3: Performance Elements and Standards” tab
2. On the row for Performance Element #2 (or any element), click on the <Update> button

**Appraisal Program**

Plan | Progress Reviews | Annual Appraisal | Narrative Statements | View/Print Form | Manage Guest Participants

Step 1: Plan Details | Step 2: Mission Goals | **Step 3: Performance Elements and Standards** | Step 4: Approvals and Acknowledgments | Step 5: Performance Elements and Standards Re-approvals

-- Choose an Action --

**Employee Information**

Employee Name **ARM Duzzuj, Xsojpuh R**  
[Show Employee Details](#)

This screen allows you to add or update a performance element and view approved performance elements for your employee. Performance elements should be written using the SMART criteria. Select **Need more information?** link to view the SMART criteria.

Step 3: Performance Elements and Standards

- Select Add Performance Element button to add a new performance element and standard(s).
- Select Update button under the Details Action column to update an unapproved performance element.
- Select View button under Details Action column to view an approved performance element.
- Select Delete icon under the Details Delete column to delete a performance element.
- Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgements.
- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

For additional guidance, select **Need Help?**

[Add Performance Element](#)

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

Details	Number	Title	Status	Element Type	Action	Delete
	1 <input type="button" value="v"/>	Test Element Number One	Approved	Critical	<input type="button" value="Update"/>	
	2 <input type="button" value="v"/>	Test of Element Number Two	Approved	Critical	<input type="button" value="Update"/>	
	3 <input type="button" value="v"/>	Test of Element Number Three	Approved	Critical	<input type="button" value="Update"/>	
	4 <input type="button" value="v"/>	Test of Element Number Four	Approved	Critical	<input type="button" value="Update"/>	
	5 <input type="button" value="v"/>	Test of Element Number Five	Approved	Critical	<input type="button" value="Update"/>	

Privacy Statement

3. When it opens, click in the “Performance Element and Standard(s)” box and take a period off the end of the last sentence, or if there is no period, take one character off a word.
4. Click on the <Save> button. The performance element status changes from “Approved” to “Pending”.
5. Click in the “Performance Element and Standard(s)” box again and put the period back on the last sentence, or put the character back that you took off in a word.
6. Click on the <Save> button.

**Update Performance Element and Standard(s)**

\* Indicates required field

This screen allows you to update a performance element and standard(s).

- Verify the Performance Element Title and start date; update the performance element and standard(s) in the text box below, or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save the performance element you worked on and another page will display to add another performance element.
- Select Go Back to Performance Elements button to go back to Step 3: Performance Elements and Standards.
  - If you select Return to Performance Elements button without saving, a warning message will display.

For additional guidance, select **Need Help?**

Performance Element Number **2**

\* Performance Element Title

\* Performance Element Start Date    
(example: 28-Apr-2017)

Performance Element Status **Pending**

Date Last Modified **03-Jan-2017**

\* Performance Element Type  

Performance Element and Standard(s)

This is a test of change a performance element to go through the re-approval process.

(Limit to 1500 characters)  Counter **85**

Privacy Statement

7. Click on the <Go Back to Performance Elements> button to return to the Step 3 tab.

**Update Performance Element and Standard(s)**

\* Indicates required field

This screen allows you to update a performance element and standard(s).

- Verify the Performance Element Title and start date; update the performance element and standard(s) in the text box below, or copy and paste from another document.
- Select Save button at top right corner to periodically save your work.
- Select Save and Add Another Performance Element button to save the performance element you worked on and another page will display to add another performance element.
- Select Go Back to Performance Elements button to go back to Step 3: Performance Elements and Standards.
  - If you select Return to Performance Elements button without saving, a warning message will display.

For additional guidance, select **Need Help?**

Performance Element Number **2**

\* Performance Element Title

\* Performance Element Start Date    
(example: 28-Apr-2017)

Performance Element Status **Pending**

Date Last Modified **03-Jan-2017**

\* Performance Element Type

Performance Element and Standard(s)

This is a test of change a performance element to go through the re-approval process.

(Limit to 1500 charaters)  Counter **85**

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8. Performance Element 2 status now shows as “Pending” and there is now a “Step 5. Performance Elements and Standards Re-approvals” tab.

**Appraisal Program**

Plan | Progress Reviews | Annual Appraisal | Narrative Statements | View/Print Form | Manage Guest Participants

Step 1: Plan Details | Step 2: Mission Goals | **Step 3: Performance Elements and Standards** | Step 4: Approvals and Acknowledgments | Step 5: Performance Elements and Standards Re-approvals

-- Choose an Action -- [Go]

**Employee Information**

Employee Name: **ARM Duzzuj, Xsojpuh R**  
[Show Employee Details](#)

This screen allows you to add or update a performance element and view approved performance elements for your employee. Performance elements should be written using the SMART criteria. Select **Need more information?** link to view the SMART criteria.

Step 3: Performance Elements and Standards

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- Select Update button under the Details Action column to update an unapproved performance element.
- Select View button under Details Action column to view an approved performance element.
- Select Delete icon under the Details Delete column to delete a performance element.
- Select Save and Continue button at the bottom right corner to move to Step 4: Approvals and Acknowledgements.
- Select Save and Go Back button at the bottom right corner to go back to Step 2: Mission Goals.

For additional guidance, select **Need Help?**

Add Performance Element [Refresh] [Print] [Settings]

Show All Details | Hide All Details

Details	Number	Title	Status	Element Type	Action	Delete
▶	1	Test Element Number One	Approved	Critical	<a href="#">Update</a>	
▶	2	Test of Element Number Two	Pending	Critical	<a href="#">Update</a>	
▶	3	Test of Element Number Three	Approved	Critical	<a href="#">Update</a>	
▶	4	Test of Element Number Four	Approved	Critical	<a href="#">Update</a>	
▶	5	Test of Element Number Five	Approved	Critical	<a href="#">Update</a>	

Save and Go Back | Save and Continue

Privacy Statement

9. Click on the “Step 5. Performance Elements and Standards Re-Approvals” tab. (NOTE: If the plan has been modified more than once, you may have a Step 6 or Step 7 Re-Approval tab)
10. In the middle of the screen, click on the <Start> button for “Step 1: Rating Official – Request or Document Higher Level Review” to start the re-approval process. This will allow you to choose either Option A to transfer it to the HLR for their approval, or Option B to document the HLR’s approval.

**DoD Performance Management Appraisal Program**

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Plan | Progress Reviews | Annual Appraisal | Narrative Statements | View/Print Form | Manage Guest Participants

Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | Step 4: Approvals and Acknowledgments | **Step 5: Performance Elements and Standards Re-approvals**

-- Choose an Action -- Go

**Employee Information**

Employee Name **ARM Duzzuj, Xsojpuh R**  
[Show Employee Details](#)

This screen allows you to start the re-approval process or view re-approval information and status of the employee's performance plan.

Step 5: Performance Elements and Standards Re-approvals

- Select Show All Details link to see re-approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see re-approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 4: Approvals and Acknowledgments.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
>	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Not Started	<b>Start</b>
>	Step 2: Higher Level Reviewer - Review (if required)	Not Started	Not Started
>	Step 3: Rating Official - Document Communication to Employee	Not Started	Start
>	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

Save and Go Back

Privacy Statement

11. The RO has two options. Option A is used to physically transfer the Plan to the HLR, and allows the RO to send an email to the HLR to notify them that the plan has been sent to them for approval. To use this choice, either leave the default message in the “Message to Higher Level Reviewer” block, or type in a message of your choosing. Then click on the <Transfer to Higher Level Review with E-mail notification> button. If you want to transfer the plan but don’t want to send an email to the HLR, then click on the <Transfer to High Level reviewer without E-mail Notification> button.

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Not Started	<b>Start</b>

TIP There are two options available to complete this step. If you are both the rating official and higher level reviewer, use Option B to document the approval.

**Option A - Transfer to the Higher Level Reviewer**

Name	Title
Neall, Barbara	Rating Official
Stapula, Priscilla Leigh	Higher Level Reviewer

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer

**Message to Higher Level Reviewer**

This screen provides space for you to send a Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the message, select the 'Transfer to Higher Level Reviewer with E-mail Notification' button to send the message.

Please review this performance plan and take the appropriate action under the Approvals and Acknowledgments tab.

**Spell Check**

Notice: You are about to contact Stapula, Priscilla Leigh 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 Higher Level Reviewer without E-mail Notification** **Transfer to Higher Level Reviewer with E-mail Notification**

12. Option B is another option that can be used which does not transfer the plan to the HLR, but instead allows the RO to document the HLR’s approval for them. **This option should ONLY be used with the HLR’s permission.**

To use Option B, after the RO clicks on the first <Start> button on the “Step 4: Approvals and Acknowledgments” tab, on the “Step 1: Rating Official – Request or Document Higher Level Review (If required)” row, the RO should scroll down to where the screen shows “Option B” as shown below. The RO would then click on the calendar icon to select the date the HLR reviewed the employee’s plan and told the RO they approved it. Then the RO would choose what method the HLR told the RO the plan was approved from the drop down menu next to the words “Method of Review”. Then the RO would click the <Save> button in the Option B section.

The date that was filled in as the date the HLR approved the plan becomes the Approval date of the plan which is reflected on the Step 1: Plan Details tab of the plan and on the RO’s MyPerformance Main Page in the “Approval Date” column.

Option A - Transfer to the Higher Level Reviewer

Name	Title
Neill, Barbara	Rating Official
Stapula, Priscilla Leigh	Higher Level Reviewer

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer:

Message to Higher Level Reviewer

This screen provides space for you to send a Higher Level Reviewer a message regarding an employee's Performance Plan. After writing the message, select the 'Transfer to Higher Level Reviewer with E-mail Notification' button to send the message.

Please review this performance plan and take the appropriate action under the Approvals and Acknowledgments tab.

Notice: You are about to contact Stapula, Priscilla Leigh 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.

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 2: Higher Level Reviewer - Review (if required)	Not Started	Not Started
▶	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

Privacy Statement

13. Once the HLR approves the plan, or the RO documents the HLR approval, the RO should then talk to the employee and communicate the re-approved plan to the employee. Then the RO would "Update" the employee's plan and click on the "Step 4: Approvals and Acknowledgments" tab again to complete the next step. The RO should click on the <Start> button for "Step 3: Rating Official – Document Communication to Employee".

**DoD Performance Management Appraisal Program**

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Step 1: Plan Details | Step 2: Mission Goals | Step 3: Performance Elements and Standards | Step 4: Approvals and Acknowledgments | **Step 5: Performance Elements and Standards Re-approvals**

-- Choose an Action -- | Go

**Employee Information**

Employee Name: ARM Happyfom, Nyxsoup R.  
[Show Employee Details](#)

This screen allows you to start the re-approval process or view re-approval information and status of the employee's performance plan.

Step 5: Performance Elements and Standards Re-approvals

- Select Show All Details link to see re-approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see re-approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 4: Approvals and Acknowledgments.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
▶	Step 3: Rating Official - Document Communication to Employee	Not Started	<b>Start</b>
▶	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed

Save and Go Back

14. After clicking on the <Start> button on Step 3, the RO would document that they communicated the plan to the employee by clicking on the calendar icon to select the date the approved plan was communicated to the employee “Communication Date” block.

Then the RO would choose a “Communication Method” that was used to communicate the plan to the employee from the drop down menu next to “Communication Method”.

Finally, the RO needs to transfer the plan to the employee for their Acknowledgment by clicking on the <Save and Transfer to Employee for Acknowledgment> button. If the employee is unable or unwilling to acknowledge the plan themselves, the RO can acknowledge the plan on the employee’s behalf by clicking on the <Save and go to Step 4> button.

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments Step 5: Performance Elements and Standards Re-approvals

Employee Information

Employee Name ARM Happyfom, Nyxsoup R.  
Show Employee Details

This screen allows you to start the re-approval process or view re-approval information and status of the employee's performance plan.

Step 5: Performance Elements and Standards Re-approvals

- Select Show All Details link to see re-approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see re-approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 4: Approvals and Acknowledgments.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
▲	Step 3: Rating Official - Document Communication to Employee	Not Started	Start

Communication Date 08-May-2018  
Communication Method Face to Face

Other

Cancel Save and Transfer to Employee for Acknowledgment Save and go to Step 4

▶ Step 4: Rating Official - Document Employee Acknowledgment Not Started Step 3 must be completed

Save and Go Back

15. If the RO transferred the plan to the employee for their Acknowledgment, then the employee would “Update” the plan and go to the “Step 4: Approvals and Acknowledgments” tab and click on the <Acknowledge Receipt> button on the row that says “Step 4 Employee – Acknowledgment”. Then the employee would click on the icon next to the “Date” box and select the date they acknowledged the performance plan. The last step is to click on the <Save> button.

**DoD Performance Management Appraisal Program**

MyBiz+ Help Logout

Plan Progress Reviews Annual Appraisal Narrative Statements View/Print Form

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards **Step 4: Approvals and Acknowledgments** Step 5: Performance Elements and Standards Re-approvals

-- Choose an Action -- Go

**Employee Information**

Employee Name Neall, Barbara  
[Show Employee Details](#)

This screen allows you to view approval information and status of your performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.
- Select the Acknowledge Receipt, if available.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
▶	Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed
▲	Step 4: Employee - Acknowledgment	Pending Empl Acknowledgment	<b>Acknowledge Receipt</b>

Date 01-Sep-2017 (dd-mmm-yyyy)

Cancel **Save**

16. If the RO needs to document the employee's Acknowledgment on their behalf, they would click on the <Start> button on the row saying "Step 4 Rating Official – Document Employee Acknowledgment".

The RO would then choose the acknowledgment method from the drop down menu next to "Acknowledgment". Then the RO would choose the date the Acknowledgment was received from the employee, or the date the employee declined acknowledgment.

The RO would then click on the <Save> button:

Step 1: Plan Details Step 2: Mission Goals Step 3: Performance Elements and Standards **Step 4: Approvals and Acknowledgments** Step 5: Performance Elements and Standards Re-approvals

-- Choose an Action -- Go

### Employee Information

Employee Name ARM Hluuxu, Zugsuo M  
▶ Show Employee Details

This screen allows you to start the approval process or view approval information and status of the employee's performance plan.

Step 4: Approvals and Acknowledgments

- Select Show All Details link to see approvals and acknowledgment information (dates, method, etc.) and Hide All Details link to collapse all steps.
- Select Show link to see approvals and acknowledgment information for each step and Hide link to collapse step.
- Select Start button under Action column for the step that needs to be completed.
- Select Save and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards.

For additional guidance, select **Need Help?**

Show All Details | Hide All Details

Details	Tasks	Status	Action
▶	Step 1: Rating Official - Request or Document Higher Level Review (if required)	Completed	Step 1 completed
▶	Step 2: Higher Level Reviewer - Review (if required)	Completed	Step 2 completed
▶	Step 3: Rating Official - Document Communication to Employee	Completed	Step 3 completed
▲	Step 4: Rating Official - Document Employee Acknowledgment	Pending Empl Acknowledgment	<b>Start</b>

**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.

Acknowledgment Employee Declined ▼  
Other Method  
Date 03-May-2018 x  
(dd-mmm-yyyy)

Cancel **Save**

Save and Go Back