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

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

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Step 1: Plan Details Step 2:	Mission Goals Step 3: Performance Elements and	d Standards Step 4: App	provals and Acknowledgments	Step 5: Performance Elements and	Standards Re-approvals					
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- 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.

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This screen allows you to update a perform	mance element and standard(s).
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For additional guidance, select Need Hel	p?
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* Performance Element Title	Test of Element Number Two
* Performance Element Start Date	01-Apr-2017 🚯 (example: 28-Apr-2017)
Performance Element Status	Pending
Date Last Modified	03-Jan-2017
* Performance Element Type	Critical
Performance Element and Standard(s	
This is a test of change a performanc	e element to go through the re-approval process.
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7. Click on the <Go Back to Performance Elements> button to return to the Step 3 tab.

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8. Performance Element 2 status now shows as "Pending" and there is now a "Step 5. Performance Elements and Standards Reapprovals" tab.

Plan P	rogress Revie	ws Annual Appraisal	Narrative Statements View/Print Form Ma	anage Guest Participants						
Step 1: F	Plan Details	Step 2: Mission Goals	Step 3: Performance Elements and Standards	Step 4: Approvals and Acknowledgments	Step 5: Performance Elements and S	tandards Re-approvals				
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- 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.

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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 scree	en allows you to start the approval process or view approval information ar	nd status of the employee's performance plan.			
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۲	TIP There are two options available to complete this step. If you are both	the rating official and higher level reviewer, u	se Option B to document the approval.	L	
	Option A - Transfer to the Higher Level Reviewer				
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	Message to Higher Level Reviewer				
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	Please review this performance plan and take the appropriate act Acknowledgments tab.	tion under the Approvals and			
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		Spell Chee	ck		
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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.

Higher Level Reviewer	Stapula, Priscilla Leigh	Method of Review	w Face to Face ➤		ancel Save		
Notice: You are about tr information such as soc Option B - Document the hig	contact Stapula, Priscilla Leigh by e-ma al security numbers or privacy act inform Cancel Transfer to Higher Le her level review has taken place by en	il. Due to the unencrypted nature (ation in your e-mail. Invel Reviewer without E-mail No tering the following information	of this e-mail commun	cation, please do not in er to Higher Level Rev	clude any non-public	n	
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Stapula, Priscilla Leig Stapula, Priscilla Leig	n ew HLR from list of values, if required.	Higher Le	evel Reviewer				
Neall, Barbara			Rating Official				

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			MyBiz+	Help Logout
Plan Pro	gress 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 Acknowledgmen	nts Step 5: Performance Elements a	nd Standards Re-approvals		
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►	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 must be completed		
					Save and Go <u>B</u> ack

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.

ep 1: Pla	an Details Step 2: Mission Goals Step 3: Performance Elements and Standards Step 4: Approvals and Acknowledgments Step	5: Performance Elements a	nd Standards Re-approvals			
				Choose an Action	✓	Go
mplo	yee Information					
Employ	yee Name ARM Happyfom, Nyxsoup R.					
Sho	ow Employee Details					
This sci	reen 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 a 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.	ill steps.				
i adu	initional guidance, select weed neip?					
how All	Details Hide All Details					
etails	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			
6	Step 3: Rating Official - Document Communication to Employee	Not Started	Start			
	Communication Date D8-May-2018 (b) (dd-mmm-yyyy) Communication Method Face V Other					
h.	Sten 4: Ration Official - Document Employee Acknowledoment	I ransfer to Employee for A	Step 3 must be completed	4		
r	ordy 4. Husing onload - Document Employee Autorineuginent	Not Stated	orep 5 must be completed			
					Save and Go Ba	ack

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 Pro	gress 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 Acknowledgment;	Step 5: Performance Elements and Standards Re-app	rovals		
Emp	oyee Information			Choose an Action	Go
Emp	oyee Name Neall, Barbara how Employee Details				
Step For a	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 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 Back and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards. Select Back and Go Back button at the bottom right corner to move to Step 3: Performance Elements and Standards. Select the Acknowledge Receipt, if available. Joidtonang guidance, select. Need Help?	all steps.			
Show	All Details Hide All Details				
Detai	s 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	Acknowledge Receipt		
	Date 01-Sep-2017 G		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.

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 ► Start Step 4: Rating Official - Document Employee Acknowledgment Pending Empl Acknowledgment 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 V Other Method Date 03-May-2018 × 🛍 (dd-mmm-yyyy) Save Cance Save and Go Back

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