

MyPerformance

(DoD Performance Management and
Appraisal Program)

Trusted Agent User Guide

May 6, 2016

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Manage Trusted Agent Authorization

Introduction

1. *Manage Trusted Agent Authorization* allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the DoD Performance Management and Appraisal Program MyPerformance tool for employees they identify for the purpose of documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer's performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance, and the rating official or higher level review retains ownership of the plan. The sole purpose of the trusted agent is to document their decisions in the employee's record. This assignment is accomplished in the 'Manager Functions' area of MyBiz+.

DCPDS Portal

1. To access *MyPerformance tool*, you must first log in to the *DCPDS Portal* at <https://compo.dcpds.cpms.osd.mil> using your *Smart Card* (CAC/PIV) or non-Smart Card (non-CAC User ID) and password. From there you will be directed to *MyBiz+*. **Performance Management and Appraisal** link is located in *Key Services*.
2. Log on with your *Smart Card* (CAC/PIV) or non-Smart Card (non-CAC User ID) and password using the applicable login button on the *DCPDS Portal* page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.

The screenshot displays the DCPDS Portal login page. At the top, there are navigation links: "Login Help | Contact List | Frequently Asked Questions (FAQ)". The main header features the "DCPDS PORTAL" logo and an American flag. A "Windows Security" dialog box is open in the center, titled "Select a Certificate". It lists two certificates: "Issued DOD EMAIL CA-31" and "Issued DOD CA-31". A red box highlights the second certificate, and a red arrow points to it. The background shows the portal's content area with "News and Info" and "Smart Card Access" sections. The "Smart Card Access" section includes a "Smart Card Login" button and a "Non-Smart Card Access" button.

Figure 1- DCPDS Portal Login Page - Certificate Selection

3. Read the *Privacy Act Statement* and select **Accept** button.

The screenshot shows the "Privacy Act Statement" page. The title is "Privacy Act Statement". The text states: "The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office." It lists "Authorities", "Principal Purposes", "Routine Uses", and "Disclosure". A red box highlights the "Accept" button at the bottom of the statement.

Figure 2 - Privacy Act Statement

Rating Officials (Managers and Supervisors) Accessing Manage Trusted Agent Authorization

1. From the *MyBiz+* home page under **Manager Functions** in **Key Services**, select the **Manage Trusted Agent Authorization** link.

The screenshot shows the MyBiz+ Home Page. At the top, there is a navigation bar with 'MyBiz+' logo and links for 'Other DCPDS Applications', 'Favorites', 'Customer Support', 'Help', and 'Logout'. Below this is a 'Notifications' table with two entries: 'DCPDS/MyBiz+ Downtime' (20-Apr-2016) and 'Annual Contact Information Review' (06-Apr-2016). A message states 'You have 2 unread notifications.' The main content area is divided into three columns: 'Key Services', 'Other Responsibilities/Applications', and 'Professional Development'. In the 'Key Services' column, the 'Manage Trusted Agent Authorization' link is highlighted with a red rectangular box. Other links in this column include 'MyPerformance', 'Manager Functions', 'Performance Management and Appraisal', 'Apply Action(s) to Multiple Employees', 'View/Print Performance Management Reports', 'View Previous Requests', 'CIV Fill Request Status', 'Update MySupervisor', and 'Update MyTeam'.

Figure 3- MyBiz+ Home Page identifying Manage Trusted Agent Authorization

2. You are now on the *Manage Trusted Agent Assignments Page* where you can assign one or more individuals to act on your behalf for documentation purposes.

The screenshot shows the 'Manage Trusted Agent Assignments' page. At the top left is the 'MyPerformance' logo. Below it, a header section contains the text: 'Manage Trusted Agent Assignments. This page allows you to assign one or more individuals to act on your behalf for documentation purposes within My Performance. You control their access by assigning a start date and/or end date.' A 'Need Help?' link is on the right. The main content area is enclosed in a red border and contains two sections: 'AUTHORIZATION FOR TRUSTED AGENT ASSIGNMENT' and 'ACKNOWLEDGMENT OF YOUR RESPONSIBILITIES'. The 'ACKNOWLEDGMENT' section lists two methods for approval. Below this is a 'Trusted Agent Role' section with a form containing two dropdown menus: '* Role' and '* System Type' (with 'Self-Service Hierarchy' selected). A 'Go' button is located below the form.

Figure 4 - Manage Trusted Agent Assignments Page

Manage Trusted Agent Assignments

Trusted Agent Role

1. Select the role under the Role drop down menu that the trusted agent will act as on behalf of the Rating Official or Higher Level Reviewer. For this scenario, select Rating Official.

The screenshot shows the 'Manage Trusted Agent Assignments' page in the MyPerformance system. The page header includes the MyPerformance logo and navigation links for 'MyBiz+', 'FAQ', and 'Logout'. Below the header, there is a section titled 'Manage Trusted Agent Assignments' with a brief description: 'This page allows you to assign one or more individuals to act on your behalf for documentation purposes within My Performance. You control their access by assigning a start date and/or end date.' A 'Need Help?' link is visible on the right. The main content area is enclosed in a red border and contains two sections: 'AUTHORIZATION FOR TRUSTED AGENT ASSIGNMENT' and 'ACKNOWLEDGMENT OF YOUR RESPONSIBILITIES'. Below this content, the 'Trusted Agent Role' section is visible. It features a 'Role' dropdown menu with a red box around it and a yellow arrow pointing to the 'Rating Official' option. A 'System Type' dropdown menu is also present, and a 'Go' button is located below it.

Figure 5 - Manage Trusted Agent Assignments Page - Role

2. Select 'DoD Performance Management Approval Program' and select 'Go' button.

The screenshot shows the 'Manage Trusted Agent Assignments' page in the MyPerformance system, similar to Figure 5. The 'Trusted Agent Role' section is visible. The 'Role' dropdown menu is now set to 'Rating Official'. The 'System Type' dropdown menu is highlighted with a red box and a yellow arrow pointing to the 'DoD Performance Management Approval Program' option. The 'Go' button is located below the dropdown menus.

Figure 6 - Manage Trusted Agent Assignments Page – System Type

Assigning Trusted Agent for Individual Employee

- Once you have selected the program, a list of your employees in that program will display. Select employee or employees under the 'Select' column on the results table for whom you want to assign the trust agent authorization.



Figure 7 - Manage Trusted Agent Assignments Page – Employee Selection

- The following fields are required: 'Trusted Agent Name' and 'Start Date'. 'End Date' is an optional field. Enter 'Trusted Agent Name'. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the 'Quick Select' icon next to your selection.

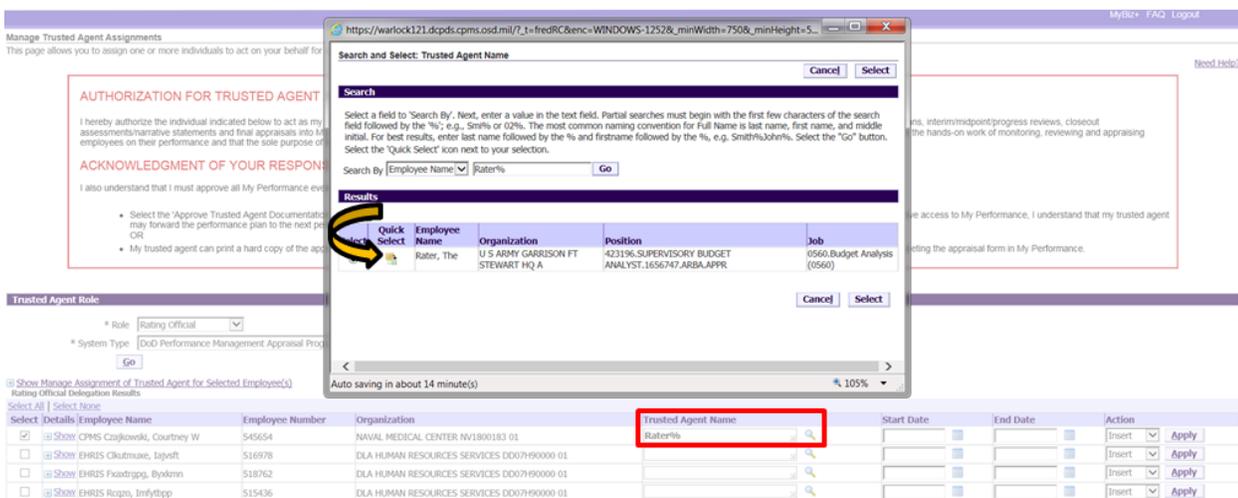


Figure 8 - Manage Trusted Agent Assignments Page – Trusted Agent Name

3. Enter 'Start Date' (date cannot be a past date). 'End Date' can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.

Trusted Agent Role

* Role: Rating Official
* System Type: DOD Performance Management Appraisal Program

Go

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Insert Apply
<input type="checkbox"/>	Show	EHRIS Klutznice, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Fxadrppg, Bykmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Rczgo, Imfytpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply

Figure 9 - Manage Trusted Agent Assignments Page – Start Date

4. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is Update. A trusted agent has been assigned as a role of rating official for the employee.

Trusted Agent Role

* Role: Rating Official
* System Type: DOD Performance Management Appraisal Program

Go

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update Apply
<input type="checkbox"/>	Show	EHRIS Klutznice, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Fxadrppg, Bykmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Rczgo, Imfytpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply

Figure 10 - Manage Trusted Agent Assignments Page - Selection

Assigning Trusted Agent for Multiple Employees

1. To assign a Trusted Agent for multiple employees, select the **Show Manage Assignment of Trusted Agent for Selected Employee(s)** link.

Trusted Agent Role

* Role: Rating Official
* System Type: DOD Performance Management Appraisal Program

Go

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	EHRIS Rczgo, Imfytpp	24-Sep-2015	20-Apr-2016	Update Apply
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Klutznice, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Fxadrppg, Bykmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Rczgo, Imfytpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply

Figure 11 - Manage Trusted Agent Assignments Page – Show Management Assignment of Trusted Agent

2. Assign Trusted Agent and Terminate Trusted Agent section opens

Trusted Agent Role

* Role: Rating Official
* System Type: DoD Performance Management Appraisal Program

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name: [Search Field]
* Start Date: [Date Field]
End Date: [Date Field]

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date: [Date Field]

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	EHRIS Rcozo, Imfytbtp	24-Sep-2015	20-Apr-2016	Update Apply
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Clatmaue, Jaysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Foadtrgop, Bykymn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Rcozo, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply

Figure 12 - Manage Trusted Agent Assignments Page – Assign Trusted Agent

3. The following fields are required: ‘Trusted Agent Name’ and ‘Start Date’. ‘End Date’ is an optional field. Enter ‘Trusted Agent Name’. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the ‘Quick Select’ icon next to your selection.

Search and Select: Trusted Agent Name

Search: [Om%e] [Go]

Search By: Employee Name [One%] [Go]

Results

Quick Select	Employee Name	Organization	Position	Job
	One, Employee	U S ARMY GARRISON FT STEWART HQ A	244014.BUDGET ANALYST.1657727.ARBA.APPR	0560.Budget Analysis (0560)

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update Apply
<input type="checkbox"/>	Show	EHRIS Clatmaue, Jaysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Foadtrgop, Bykymn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply
<input type="checkbox"/>	Show	EHRIS Rcozo, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert Apply

Figure 13 - Manage Trusted Agent Assignments Page – Search and Select Trusted Agent Name

4. Enter ‘Start Date’ (date cannot be a past date). ‘End Date’ can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name:

* Start Date:

End Date:

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Cikluzmae, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fkaxdrqgg, Bykxmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Rczqz, Imfytpg	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>

Figure 14 - Manage Trusted Agent Assignments Page – Start Date

5. Select the employees from list you wish to have a trusted agent assigned for and select **Apply** button.

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name:

* Start Date:

End Date:

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Cikluzmae, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	Show	EHRIS Fkaxdrqgg, Bykxmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>
<input checked="" type="checkbox"/>	Show	EHRIS Rczqz, Imfytpg	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>

Figure 15 - Manage Trusted Agent Assignments Page – Employee Selection

6. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is Update. A trusted agent has been assigned as a role of rating official for the employees. A trusted agent can create a plan, input elements, and document the Higher Level Review and communications to employee.

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name:

* Start Date:

End Date:

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Cikluzmae, Jaysoft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fkaxdrqgg, Bykxmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Rczqz, Imfytpg	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update <input type="button" value="Apply"/>

Figure 16 - Manage Trusted Agent Assignments Page

7. To collapse this area, select **Hide Manage Assignment of Trusted Agent for Selected Employee(s)** link.

Trusted Agent Role

* Role: Rating Official

* System Type: DoD Performance Management Appraisal Program

Hide Manage Assignment of Trusted Agent for Selected Employee(s)

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
- Tip: You cannot enter a past date for Start Date.
3. Optionally, enter an End Date to limit assignment period
4. Select employee(s) from results table below
5. Select 'Apply' button

* Trusted Agent Name:

* Start Date:

End Date:

Clear Apply

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

Apply

Rating Official Delegation Results

Select All | Select None

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Cikutmaue, Jaysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fkaxtrggp, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Rczqzo, Imfybtpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>

Figure 17 - Manage Trusted Agent Assignments Page – Hide Manage Assignment of Trusted Agent

Trusted Agent Role

* Role: Rating Official

* System Type: DoD Performance Management Appraisal Program

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select All | Select None

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Cikutmaue, Jaysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fkaxtrggp, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Rczqzo, Imfybtpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>

Figure 18 - Manage Trusted Agent Assignments Page

Terminate Trusted Agent Authorization for Individual Employee

1. Select employee under the Select column to terminate trusted agent authorization. Note: End Date must be blank.

Manage Trusted Agent Assignments
This page allows you to assign one or more individuals to act on your behalf for documentation purposes within My Performance. You control their access by assigning a start date and/or end date. [Need Help?](#)

AUTHORIZATION FOR TRUSTED AGENT ASSIGNMENT

I hereby authorize the individual indicated below to act as my trusted agent within My Performance for the purpose of documenting performance management events such as the transcription of performance plans, interim/midpoint/progress reviews, closeout assessments/narrative statements and final appraisals into My Performance for the employees selected below. I understand that this does not alleviate my performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance and that the sole purpose of the trusted agent is to document my decisions in the employee's My Performance records.

ACKNOWLEDGMENT OF YOUR RESPONSIBILITIES

I also understand that I must approve all My Performance events documented by my trusted agent and route the document to the next step by using one of the following methods:

- Select the 'Approve Trusted Agent Documentation' button located in the employee's My Performance record under the appropriate Approvals and Acknowledgments tab. In the case that I do not have access to My Performance, I understand that my trusted agent may forward the performance plan to the next person in the chain of command to accomplish this task.
- OR
- My trusted agent can print a hard copy of the appraisal form and obtain my signature approving the action. My trusted agent can document the fact that this has taken place for the purpose of completing the appraisal form in My Performance.

Trusted Agent Role

* Role:

* System Type:

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select	Details/Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Cikutmuxe, Iajysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Fxaxtrggp, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Rczqzo, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>

Figure 19 - Figure 19 – Manage Trusted Agent Assignments Page – Terminate Trusted Agent

2. Enter End Date – The end date entered will take affect at the end of the day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date. Select **Apply** button.

Trusted Agent Role

* Role:

* System Type:

Show Manage Assignment of Trusted Agent for Selected Employee(s)

Rating Official Delegation Results

Select	Details/Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input checked="" type="checkbox"/>	Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Cikutmuxe, Iajysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Fxaxtrggp, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>
<input type="checkbox"/>	Show EHRIS Rczqzo, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	<input type="text"/>	Update <input type="button" value="Apply"/>

Figure 20 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

Terminate Trusted Agent Authorization for Multiple Employees

1. To terminate trusted agent authorization for multiple employees, enter End Date.

Trusted Agent Role

* Role: Rating Official
* System Type: DoD Performance Management Appraisal Program

Assign Trusted Agent

To assign a Trusted Agent:

- Enter Trusted Agent Name
- Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
- Optionally, enter an End Date to limit assignment period
- Select employee(s) from results table below
- Select 'Apply' button

* Trusted Agent Name: [Search Field]
* Start Date: [Date Picker]
End Date: [Date Picker]

Terminate Trusted Agent

To terminate a Trusted Agent:

- Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
- Select employee(s) from results table below
- Select 'Apply' button

* End Date: **22-Apr-2016**

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	Update Apply
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	[Search Field]			Insert Apply
<input type="checkbox"/>	Show	EHRIS Cikutmuwe, Iajvsft	516978	DLA HUMAN RESOURCES SERVICES D007H90000 01	[Search Field]			Insert Apply
<input type="checkbox"/>	Show	EHRIS Fxaxtrggp, Bvdkmn	518762	DLA HUMAN RESOURCES SERVICES D007H90000 01	One, Employee	21-Apr-2016		Update Apply
<input type="checkbox"/>	Show	EHRIS Rczqz, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES D007H90000 01	One, Employee	21-Apr-2016		Update Apply

Figure 21 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

2. Select the employees under the Select column to terminate trusted agent authorization. Note: End Date must be blank. Select **Apply** button.

Trusted Agent Role

* Role: Rating Official
* System Type: DoD Performance Management Appraisal Program

Assign Trusted Agent

To assign a Trusted Agent:

- Enter Trusted Agent Name
- Enter Start Date
- Tip: You cannot enter a past date for Start Date.**
- Optionally, enter an End Date to limit assignment period
- Select employee(s) from results table below
- Select 'Apply' button

* Trusted Agent Name: [Search Field]
* Start Date: [Date Picker]
End Date: [Date Picker]

Terminate Trusted Agent

To terminate a Trusted Agent:

- Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.**
- Select employee(s) from results table below
- Select 'Apply' button

* End Date: 22-Apr-2016

Rating Official Delegation Results

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	Update Apply
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	[Search Field]			Insert Apply
<input type="checkbox"/>	Show	EHRIS Cikutmuwe, Iajvsft	516978	DLA HUMAN RESOURCES SERVICES D007H90000 01	[Search Field]			Insert Apply
<input checked="" type="checkbox"/>	Show	EHRIS Fxaxtrggp, Bvdkmn	518762	DLA HUMAN RESOURCES SERVICES D007H90000 01	One, Employee	21-Apr-2016		Update Apply
<input checked="" type="checkbox"/>	Show	EHRIS Rczqz, Imfytbtp	515436	DLA HUMAN RESOURCES SERVICES D007H90000 01	One, Employee	21-Apr-2016		Update Apply

Figure 22 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

3. End dates have been applied and end dates entered will take affect at the end of the day, so the supervisor or the new trusted agent will not be allowed to enter any data until the next day.

Trusted Agent Role

* Role:
 * System Type:

Hide Manage Assignment of Trusted Agent for Selected Employee(s)
 * Indicates required field

Assign Trusted Agent

To assign a Trusted Agent:

1. Enter Trusted Agent Name
2. Enter Start Date
3. Tip: You cannot enter a past date for Start Date.
4. Optionally, enter an End Date to limit assignment period
5. Select employee(s) from results table below
6. Select 'Apply' button

* Trusted Agent Name:
 * Start Date:
 End Date:

Terminate Trusted Agent

To terminate a Trusted Agent:

1. Enter End Date
- Tip: The End Date cannot be earlier than the Start Date.
2. Select employee(s) from results table below
3. Select 'Apply' button

* End Date:

Rating Official Delegation Results
 Select All | Select None

Select	Details	Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	<input type="button" value="Update"/> <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01				<input type="button" value="Insert"/> <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Gkoutmaxe, Iajysft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				<input type="button" value="Insert"/> <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fxaxtrggg, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	22-Apr-2016	<input type="button" value="Update"/> <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Fxaxtrggg, Byxkmm	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01				<input type="button" value="Insert"/> <input type="button" value="Apply"/>
<input type="checkbox"/>	Show	EHRIS Rcoqo, Imflytpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016	22-Apr-2016	<input type="button" value="Update"/> <input type="button" value="Apply"/>

Figure 23 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

Acting as Trusted Agent

The information provided below directs the user to the portal link and walks the user through the access process with follow-on directions to the DoD Performance Management and Appraisal Program.

DCPDS Portal

1. To access **MyPerformance tool**, you must first log in to the **DCPDS Portal** at <https://compo.dcpds.cpms.osd.mil> using your **Smart Card (CAC/PIV)** or non-Smart Card (non-CAC User ID) and password. From there you will be directed to **MyBiz+**. **MyPerformance** link is located in *Key Services*.
2. Log on with your **Smart Card (CAC/PIV)** or non-Smart Card (non-CAC User ID) and password using the applicable login button on the **DCPDS Portal** page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.



Figure 24 - DCPDS Portal Login Page - Certificate Selection

3. Read the **Privacy Act Statement** and select the **Accept** button.

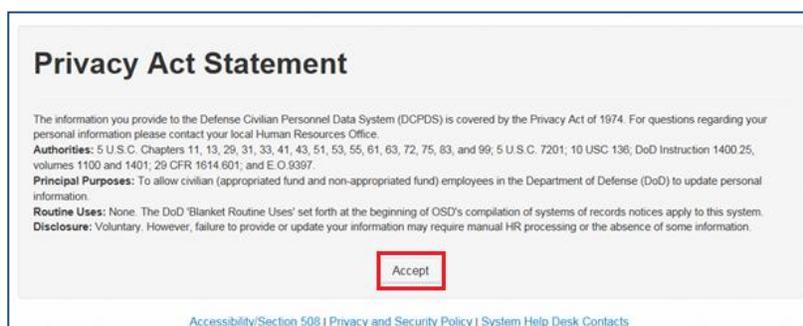


Figure 25 - Privacy Act Statement

- From the *MyBiz+* home page, Other Responsibilities/Applications has to be part of your views to select CIV Trusted Agent responsibility. Select **CIV Trusted Agent** link.

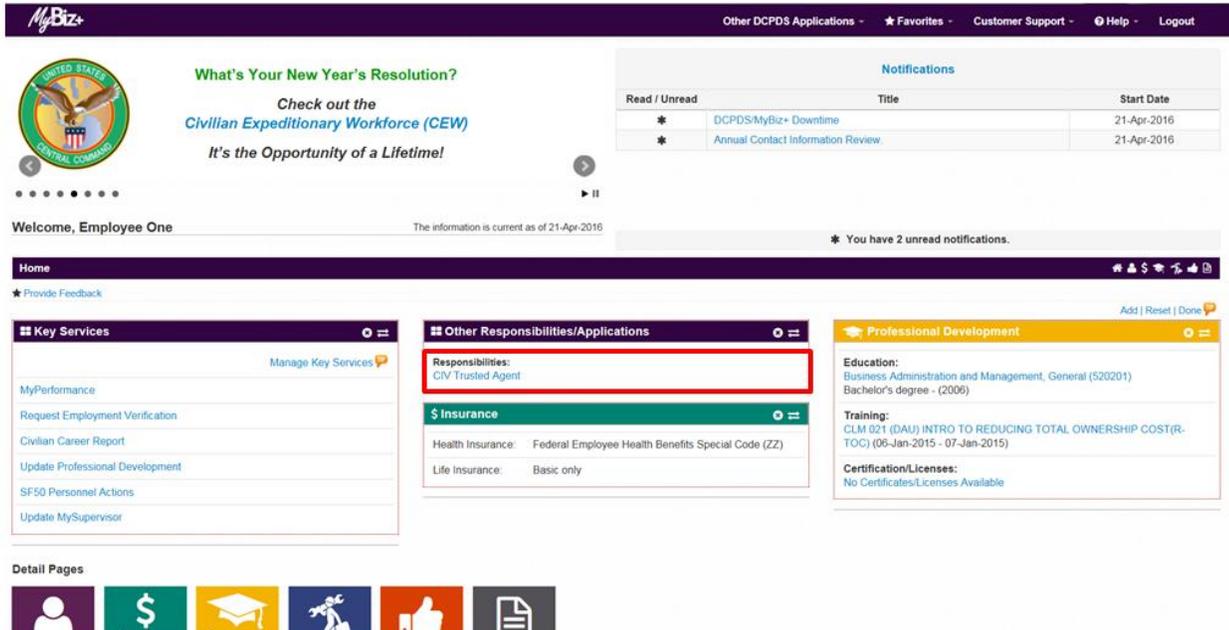


Figure 26 - MyBiz+ Home Page identifying CIV Trusted Agent Responsibility

Acting as Trusted Agent under CIV Trusted Agent Responsibility

- Select **Acting as Trusted Agent** link under CIV Trusted Agent

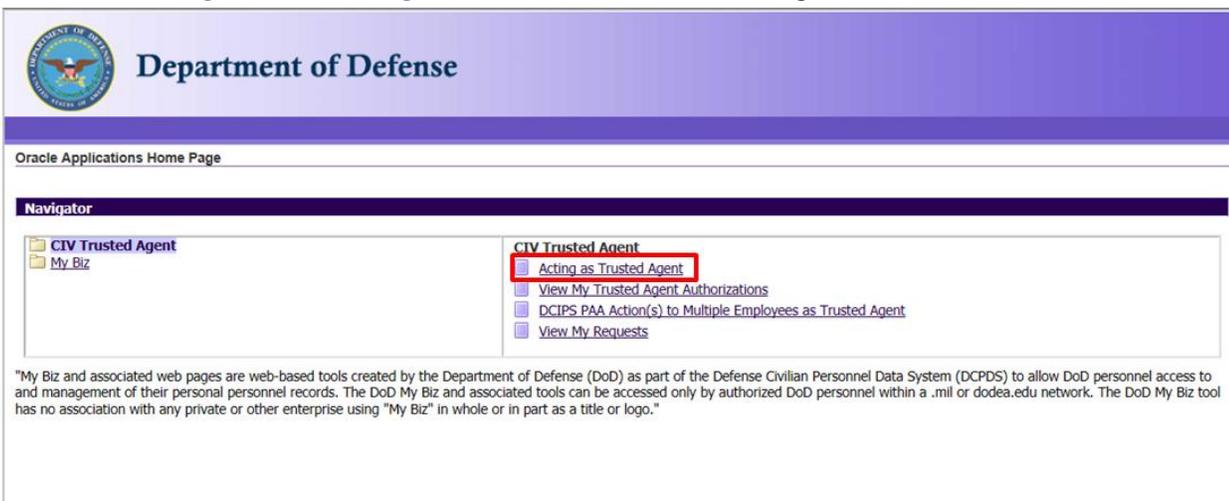


Figure 27 - Navigator – CIV Trusted Agent – Acting as Trusted Agent

2. You are now on the MyPerformance Main Page as the Trusted Agent.

Trusted Agent

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 employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, 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. You are limited to viewing only the Plans/Appraisals that you have participated in as a Trusted Agent.

To create a Performance Plan: To complete other actions described above:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button
- Select an option from the Action column
- Select the 'Go' button

Important: To become familiar with the columns, select the 'Need Help?' link.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Trusted Agent for: --Choose One--

Appraisal Year: ALL

Create New Plan: --Choose a Plan Type-- Go

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
No search conducted.									

Select the link to search for Completed Plans

[Show Completed Plans/Appraisals](#)

Figure 28 - MyPerformance Main Page as Trusted Agent

3. Select the drop down arrow next to Trusted Agent to select the employee you are Trusted Agent for.

Trusted Agent

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 employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, 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. You are limited to viewing only the Plans/Appraisals that you have participated in as a Trusted Agent.

To create a Performance Plan: To complete other actions described above:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button
- Select an option from the Action column
- Select the 'Go' button

Important: To become familiar with the columns, select the 'Need Help?' link.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Trusted Agent for: RO - EHRIS Vzglotaf, Nemuevot Z

Appraisal Year: ALL

Create New Plan: --Choose a Plan Type-- Go

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
No search conducted.									

Select the link to search for Completed Plans

Figure 29 - MyPerformance Main Page Trusted Agent For

4. You can select an Appraisal Year by selecting the drop down arrow next to Appraisal Year or leave as ALL. From this screen, you can create, update and/or view a performance plan/appraisal. You have the same responsibilities as the rating official.

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 Employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan, 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. You are limited to viewing only the Plans/Appraisals that you have participated in as a Trusted Agent.

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.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Trusted Agent to: 2015 EHRIS Yzagotz, Nvmuyezct Z
 Appraisal Year: 2016 ALL
 Records Displayed: 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Action
EHRIS Ragoza, Imfybtpp	EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	2017	38	20-Apr-2016	DoD	Modified	Plan Approved	View Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	42	02-May-2016	DoD	Approved	Narrative Statement in Progress	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	43	13-Jan-2016	DoD	Approved	Plan Approved	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	44	04-Jan-2016	DoD	Approved	Plan Approved	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	45	04-Jan-2016	DoD	Modified	Plan Returned for Change	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	56	01-Feb-2016	DoD	Approved	Progress Review in Progress	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Mgrahow, Esucbz R	EHRIS Yzagotz, Nvmuyezct Z	2017	75	01-Feb-2016	DoD	Modified	Plan Pending HLR Review	View Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	76		DoD	Pending	Plan in Progress	Update Go
EHRIS Ragoza, Imfybtpp	EHRIS Yzagotz, Nvmuyezct Z	EHRIS Yzagotz, Nvmuyezct Z	2017	95	01-Mar-2016	DoD	Approved	Progress Review in Progress	Update Go

Figure 30 - MyPerformance Main Page Trusted Agent For Appraisal Year

- For additional guidance on how to create or edit a performance plan/appraisals and approvals and acknowledgments as a rating official, see the MyPerformance (DoD Performance Management and Appraisal Program) Rating Official Guide (Supervisors and Managers).

View My Trusted Agent Authorizations

- Select **View My Trusted Agent Authorizations** link under CIV Trusted Agent in the Navigator pane.

Oracle Applications Home Page

Navigator

- CIV Trusted Agent
 - My Biz
 - Acting as Trusted Agent
 - View My Trusted Agent Authorizations**
 - DCIPS PAA Action(s) to Multiple Employees as Trusted Agent
 - View My Requests

"My Biz and associated web pages are web-based tools created by the Department of Defense (DoD) as part of the Defense Civilian Personnel Data System (DCPDS) to allow DoD personnel access to and management of their personal personnel records. The DoD My Biz and associated tools can be accessed only by authorized DoD personnel within a .mil or dodea.edu network. The DoD My Biz tool has no association with any private or other enterprise using "My Biz" in whole or in part as a title or logo."

Figure 31 - Navigator Page – View My Trusted Agent Authorizations

- The View My Trusted Agent Authorizations screen shows who you are a trusted agent for, and what role – rating official or higher level reviewer you occupy for each employee assigned to you.

NOTE: DCIPS PAA Action(s) to Multiple Employees as Trusted Agent and View My Request links are not part of the DoD Performance Management and Appraisal Program. These links are used by Defense Civilian Intelligence Personnel System.