How to Create a Progress Review

1. This guide gives instructions on how either the employee or the Rating Official (RO) can create the Progress Review. Whomever creates the Progress Review must have possession of the plan.

2. On the employee’s or RO’s MyPerformance Main page, choose “Update” on the drop down menu for the employee’s plan you want to create a Progress Review for and click on the <Go> button to open the plan.
3. With the plan open, click on the “Progress Review” tab
4. Click on the <Create Progress Review> button. If there is no <Create Progress Review> button, or if the button is greyed out, that means the plan is not in an “Approved” status and must be approved, or re-approved if a modification was made after it was initially approved.
5. The Progress Review has now been created and the next step is for the employee to input their comments on the Progress Review for each performance element before the RO inputs their assessment. So if the RO created the progress review, the RO should click on the <Go Back to Progress Reviews> button to go back to the Progress Reviews tab in order to transfer the plan to the employee. If the employee created the progress review, then the employee should skip to Step 7 of this guide and start inputting their comments.
6. If the RO created the progress review, and clicked on the <Go Back to Progress Reviews> button, then when the RO is back at the Progress Review tab, they would click on the drop down menu on the right side of the screen and choose “Transfer to Employee”.
7. Once the employee has possession of their plan and it is open, they would click on the “Progress Review” tab.
8. Then they would click on the “Update” button.
9. If the employee wants to provide comments on any or all of their performance elements for the Progress Review, they would do so on the “Assessments” tab of the Progress Review which is shown by default when the Progress Review is opened.

10. The employee would then click on the radio button for each of the performance elements, and enter their comments in the “Employee Input” block. By clicking on the <Go to Next Performance Element> button after entering their comments, this saves their comments on that element, and moves to the next element automatically so that they can add comments on the next element. They can also click on the <Go Back to Top of Page> button which will scroll back to the top of the page.
11. Once the employee is done entering their comments, they would click on the <Go Back to Progress Reviews> button to get back to the main tab of the Progress Review.
12. The employee would then click on the “Transfer to Rating Official” from the drop down menu under “Choose an Action” on the right hand side of the screen.
13. When the RO has possession of the plan, they should follow the steps in #8 of these instructions to fill in the Rating Official Assessment block for each performance element they wish to provide comments on.

14. Once the employee transfers the plan to the Rating Official, and the RO has possession of it, the Rating Official would use the same steps (See steps 8 thru 10) to open the Progress review, go to the “Assessments” tab, and input any comments they wish in the “Rating Official Assessment” block of the performance elements, and click on the <Go To Next Performance Element> button, which saves their comments on that element, and moves to the next element to add comments. They can also click on the <Go Back to Top of Page> button which will scroll back to the top of the page.
15. Once the Rating Official has entered comments on the performance elements, they should click on the “Approvals and Acknowledgements” tab to start the approval process.
16. This process is the same as the approvals process for the plan, so the Rating Official would complete the steps to approve the Progress Review.

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<tr>
<th>Details</th>
<th>Status</th>
<th>Action</th>
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<tbody>
<tr>
<td>Step 1:</td>
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<td>Start</td>
</tr>
<tr>
<td>Step 2:</td>
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</tr>
<tr>
<td>Step 3:</td>
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<td>Start</td>
</tr>
<tr>
<td>Step 4:</td>
<td>Not Started</td>
<td>Step 3 must be completed</td>
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