

Rating Official Job Aide for GS ePerformance Module

Creating an Employee's Performance Plan

ePerformance enables Employees or Rating Officials to enter an employee's critical elements into ePerformance. The system will then generate a printable PDF of the employee's plan as it progresses through the performance cycle. Regardless of whether the Employee creates their plan or the Rating Official creates the Employee's plan, only the Rating Official can make changes to the plan following plan creation. After the plan creation, the plan must navigate through the review and signature process as governed by the ePerformance workflow. To create a performance plan, perform the following steps:

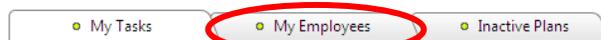
1. Log into ePerformance.



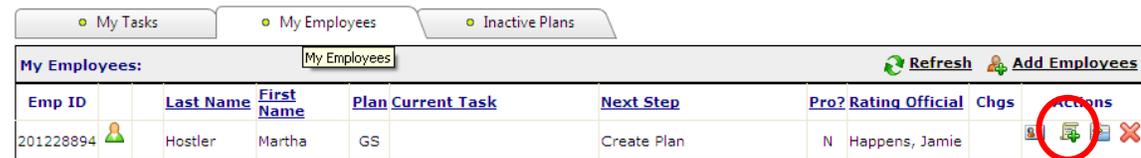
[Click here to learn more about this page](#)



2. Click the "My Employees" tab.



3. Click the "Create a Plan Link" icon for the plan of the desired employee.



4. The plan creation wizard will open (if an option is not available, it will be grayed out).

Plan Creation Wizard -- Webpage Dialog

Select an option:

Select an option from the list below to continue. You will be able to edit the plan once it is created.

- Cascade elements and outcomes from rating official's performance plan.
- Create a plan with required elements/outcomes and let me customize it later.
- Clone from employee's previous completed plan.

Callout 1: If you, as the GS Rating Official, have a plan in the system for the current performance cycle, that plan can be cascaded into the employee's plan using the first option. SES Plans cannot be cascaded to a GS plan.

Callout 2: If a plan needs to be created where each element will be individually created, use the second option.

Callout 3: If a plan can be cloned from the previous performance cycle and edited for the current cycle, the third option can be selected.

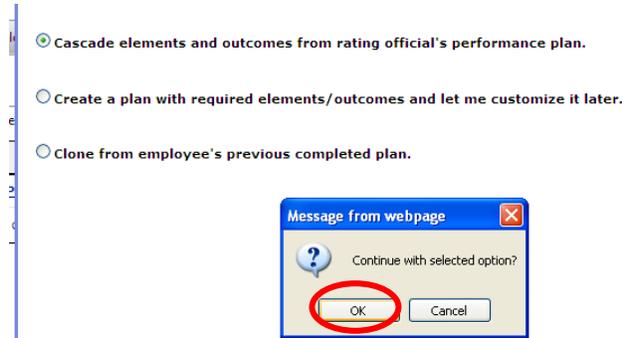
5. With the default radio button selected to the first option, select "Continue."

For the purposes of this job aide, the plan will be cascaded from the Rating Official's plan.



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6. Click "OK."



7. A window will open to allow **deselecting** of critical elements that do not apply to the employee.

8. **If** employee is a Rating Official to other employees, **leave** the supervisory critical element in the plan; otherwise, **deselect** the supervisory critical element.

Element	Outcomes/Expectations	Select
Supervisory Critical Element	1.1 - Supervisory element outcome.	<input type="checkbox"/>
Element #1	2.1 - Outcome #1	<input checked="" type="checkbox"/>
Element #2	3.1 - Outcome #2	<input checked="" type="checkbox"/>

9. Click "Continue."



10. Click "OK."



11. ePerformance will populate a plan for the employee based on selected critical elements.

ID	Title	Rating	Weight	Required?	Critical?	Actions
2624	Element #1		Double (X2)	N	Y	<input type="checkbox"/> <input checked="" type="checkbox"/>
2625	Element #2		Double (X2)	N	Y	<input type="checkbox"/> <input checked="" type="checkbox"/>

12. Click the "Open Element" link for the first critical element.

ID	Title	Rating	Weight	Required?	Critical?	Actions
2624	Element #1		Double (X2)	N	Y	<input checked="" type="checkbox"/> <input type="checkbox"/>
2625	Element #2		Double (X2)	N	Y	<input type="checkbox"/> <input checked="" type="checkbox"/>

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13. **Edit** title, description, weight, contributing factors, goals, and outcome to tailor element to the employee.

ePerformance - Element Details -- Webpage Dialog

Element Details: (ID 2624) Refresh Element Add Goals Save Element Close

Title: (Limit 110 characters) Internal System Use Only
Element #1

Description: (Limit 110 characters)
Element #1

Weight: Single (X1) Double (X2) Triple (X3)

Contributing Factors:

Customer Service Communication Resourcefulness/Innovation
 Responsibility/Accountability Teamwork Safety

Goal	Description	Fiscal Year	Action
DOE Goal 4	Establish an operational and adaptable framework that combines the best wisdom of all Department stakeholders to maximize mission success.	DOE Strategic Goals May 2011	<input checked="" type="checkbox"/>

Outcomes/Expectations: Add Outcome Remove

Outcome Detail: (ID: 1144)

Description: (Limit 2300 characters)
Outcome #1

14. Click the **“Save Element”** link; then Click the **“Close Element”** link.

ePerformance - Element Details -- Webpage Dialog

Element Details: (ID 2624) Refresh Element Add Goals Save Element Close

15. **Edit** the remaining elements in the same manner.

16. If there are not at least three elements for the employee, develop one or more additional elements.

17. Click the **“Add Element”** link.

ID	Title	Rating	Weight	Required?	Critical?	Actions
2624	Edited Element #1 Title		Double (X2)	N	Y	<input type="checkbox"/> <input checked="" type="checkbox"/>
2625	Element #2		Double (X2)	N	Y	<input type="checkbox"/> <input checked="" type="checkbox"/>

18. Click **“OK.”**

Message from webpage

Do you want to add a new element to this plan?

19. Give element a **“Title”** and **“Description.”** It is a good practice to make the element title and description the same.

Element Details: (ID New Element 3) Refresh Element Add Goals Save Element Close

Title: (Limit 110 characters) Internal System Use Only
Element #3 Title

Description: (Limit 110 characters)
Element #3 Description

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20. Assign an element weight.

Element #3 Description

Weight: Single (X1) Double (X2) Triple (X3)

21. Identify one or more contributing factors.

Contributing Factors:

Customer Service Communication Resourcefulness/Innovation
 Responsibility/Accountability Teamwork Safety

22. Click on the "Save Element" link.

ePerformance - Element Details -- Webpage Dialog

Element Details: (ID 2626) Refresh Element Add Goals **Save Element** Close

23. Click the "Add Goals" link.

ePerformance - Element Details -- Webpage Dialog

Element Details: (ID 2626) Refresh Element **Add Goals** Save Element Close

24. Using the "Fiscal Year" drop-down menu, select the desired set of goals and Click "Search."

Find Goals (use % for wild-card searches):

Description:

Fiscal Year: -- Select a year --
 -- Select a year --
 CF Strategic Goals
 DO NOT USE!!!!!! DOE Strategic
DOE Strategic Goals May 2011
 EIA Strategic Goals
 HC Implementation Goals
 HC Strategic Goals

Search Clear

25. Select one or more goals that the critical element flows out of.

ID	Title	Description	Fiscal Year	Select
1	DOE Goal 1	Catalyze the timely, material, and efficient transformation of the nations energy system and secure U.S. leadership in clean energy technologies.	DOE Strategic Goals May 2011	<input type="checkbox"/>
2	DOE Goal 2	Maintain a vibrant U.S. effort in science and engineering as a cornerstone of our economic prosperity with clear leadership in strategic areas.	DOE Strategic Goals May 2011	<input type="checkbox"/>
3	DOE Goal 3	Enhance nuclear security through defense, nonproliferation, and environmental efforts.	DOE Strategic Goals May 2011	<input type="checkbox"/>
4	DOE Goal 4	Establish an operational and adaptable framework that combines the best wisdom of all Department stakeholders to maximize mission success.	DOE Strategic Goals May 2011	<input checked="" type="checkbox"/>

26. Click "OK."

ID	Title	Description	Fiscal Year	Select
1	DOE Goal 1	Catalyze the timely, material, and efficient transformation of the nations energy system and secure U.S. leadership in clean energy technologies.	DOE Strategic Goals May 2011	<input type="checkbox"/>
2	DOE Goal 2	Maintain a vibrant U.S. effort in science and engineering as a cornerstone of our economic prosperity with clear leadership in strategic areas.	DOE Strategic Goals May 2011	<input type="checkbox"/>
3	DOE Goal 3	Enhance nuclear security through defense, nonproliferation, and environmental efforts.	DOE Strategic Goals May 2011	<input type="checkbox"/>
4	DOE Goal 4	Establish an operational and adaptable framework that combines the best wisdom of all Department stakeholders to maximize mission success.	DOE Strategic Goals May 2011	<input checked="" type="checkbox"/>

Message from webpage: Do you want to assign selected goals?
 OK Cancel

27. Click the "Add Outcome" link.

Goals:

Goal	Description	Fiscal Year	Action
DOE Goal 4	Establish an operational and adaptable framework that combines the best wisdom of all Department stakeholders to maximize mission success.	DOE Strategic Goals May 2011	<input checked="" type="checkbox"/>

Outcomes/Expectations: **Add Outcome** Remove

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28. Enter the outcome in the **SMART** format.

Outcomes/Expectations: Add Outcome Remove

3.1 Outcome Detail: (ID: 1146)

Description: (Limit 2300 characters)

Outcome #3 narrative

29. Click the **“Save Element”** link and then the **“Close”** link.

ePerformance - Element Details -- Webpage Dialog

Element Details: (ID 2626)

Refresh Element Add Goals Save Element Close

30. Review the performance plan element-by-element by clicking each **“Open Element”** link, **or**

Plan Elements:						Refresh	Select Elements	Add Element
ID	Title	Rating	Weight	Required?	Critical?	Actions		
2624	Edited Element #1 Title		Double (X2)	N	Y			
2625	Element #2		Double (X2)	N	Y			
2626	Element #3 Title		Double (X2)	N	Y			

31. Open the PDF of the plan by clicking the **“View PDF”** link.

Plan Info Plan Raters Notes Summary Comments Change History

General Information: (Employee: Hostler, Martha)

View PDF Release

32. Click the **“Open”** button.

File Download

Do you want to open or save this file?

Name: PerformancePlan.pdf
Type: Adobe Acrobat Document
From: eperformancedev.doe.gov

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

33. Adobe Acrobat Reader will display the employee’s plan on the DOE appraisal form.

34. When satisfied with the plan, **close** the Acrobat window by clicking the red **“x.”**

DEPARTMENT OF ENERGY SUPERVISORY/NON-SUPERVISORY PERFORMANCE PLAN AND APPRAISAL FORM	
SECTION 1 - EMPLOYEE DATA	
1a. Name (Last, First MI) Hostler, Martha	1b. Position Title/ Pay Plan/Series/Grade Administrative Support Specialist/GS/1910/6
1c. Organization	1d. Duty Station

[2].pdf (SECURED) - Adobe Acrobat Pro

Tools Comment Share

DEPARTMENT OF ENERGY
SUPERVISORY/NON-SUPERVISORY PERFORMANCE PLAN AND APPRAISAL FORM

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35. If editing is necessary, edit the plan contents using the respective “**Open Critical Element**” link.

Plan Elements:						Refresh	Select Elements	Add Element
ID	Title	Rating	Weight	Required?	Critical?	Actions		
2624	Edited Element #1 Title		Double (X2)	N	Y			
2625	Element #2		Double (X2)	N	Y			
2626	Element #3 Title		Double (X2)	N	Y			

36. Repeat steps 2 through 35 for any remaining employees.

37. Log out of ePerformance.

Once the plans are created for the Rating Official’s employees, the plans must be shared with them. Use the “**release**” link to route the plans to the respective employees. **It is a good practice to have one or more discussions with each employee before and during the plan development process, before the plan is electronically released to the employees.** All performance plans must navigate through the electronic review and acknowledgement workflow process to put performance plans in effect. The ePerformance system’s series of releases and acknowledgements replicate the review and approval process for an employee’s performance plan. The employee and rating official SHOULD NOT rely on ePerformance as the only communication tool for developing an employee’s performance plan. **It is essential that a performance plan be a collaborative effort between the Employee and their Rating Official to include any necessary involvement from the Reviewing Official.**