Interim Review and Mock Rating Guide

DEPARTMENT OF DEFENSE EDUCATION ACTIVITY

NSPS Program Office

2 April 2008

This guide will walk you through the Employee and Rating Official steps necessary to complete the Interim Review and ratings for the Mock Pay Pool.

The table below summarizes the steps in the process that the Employee and the Rating Official are responsible for completing. The steps are sequential and must be completed in order.

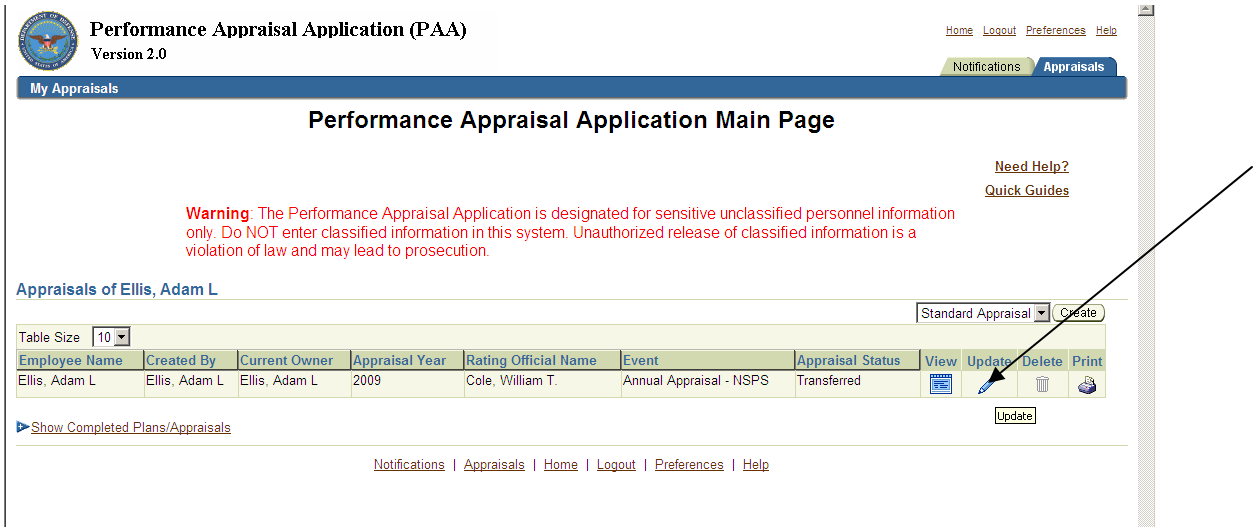
Role	Steps	Pages
Employee	1 – 7	2 – 4
Rating Official	1 – 18	5 – 11
Employee	1 – 5	12 – 13
Rating Official	1 – 4	14

Please note that the performance plan must start with the employee. The Rating Official will need to transfer the plan to the employee if it is not there already.

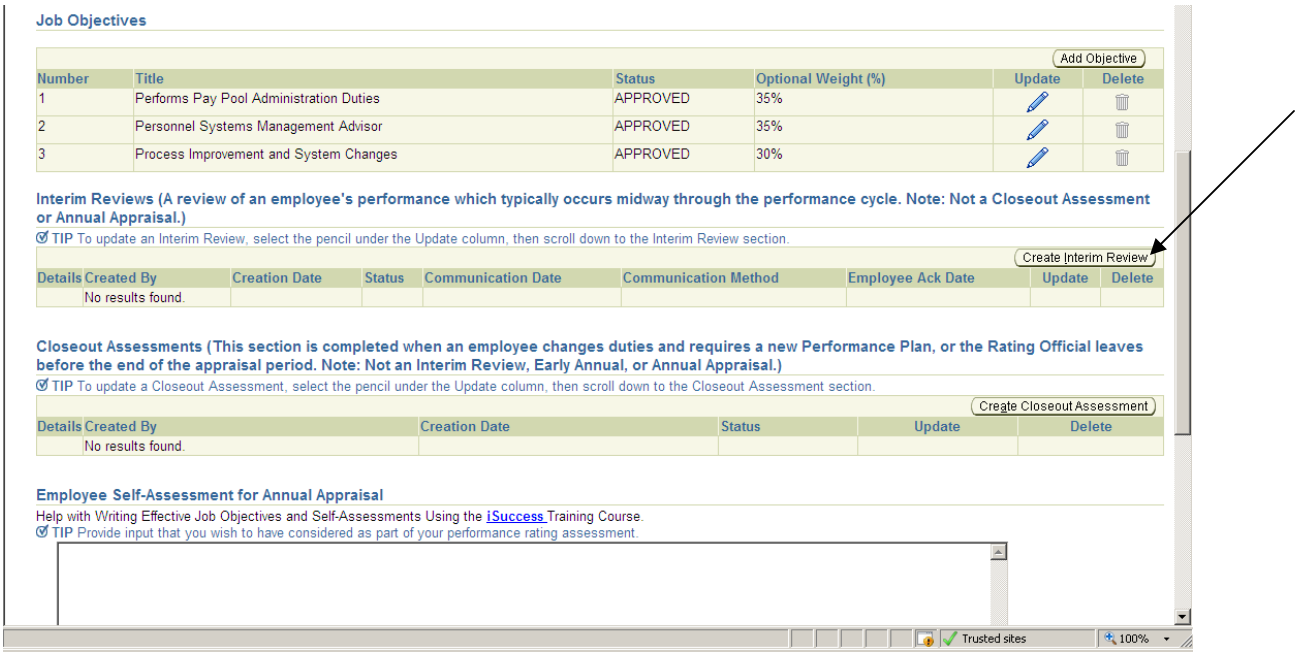
Important note for Rating Officials: You are only to discuss your written assessment with the Employee. You should **NOT** share the Mock rating.

Employee Interim Assessment

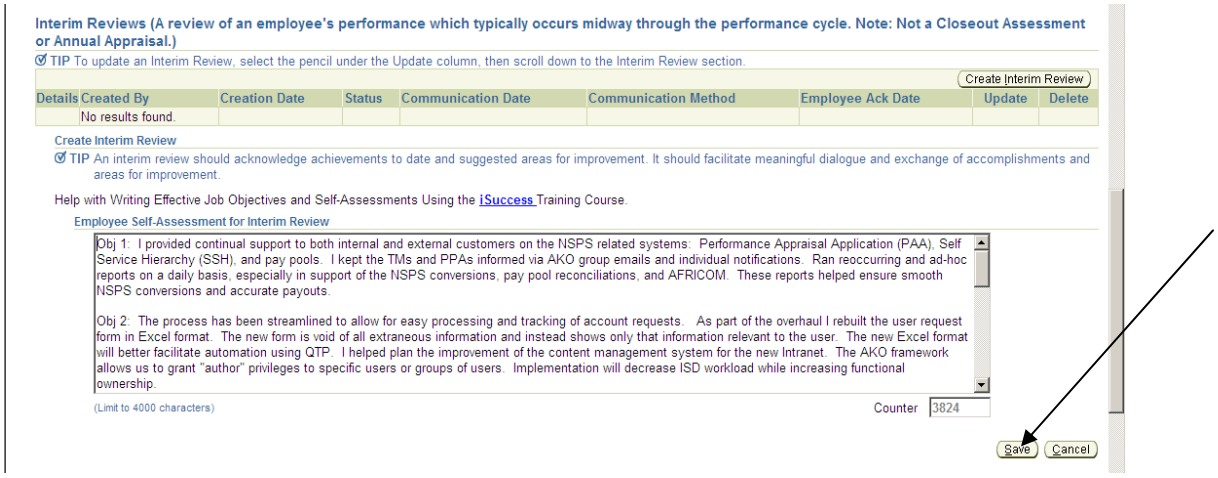
1. Select the blue pencil to update the plan.



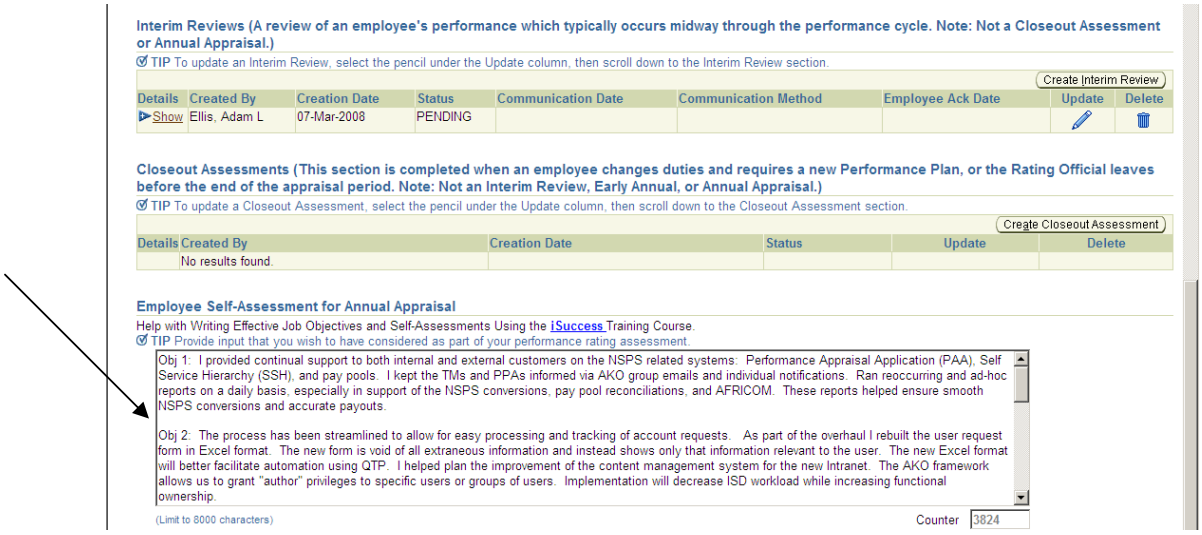
2. Scroll down to the Interim Review section. Select the "Create Interim Review" button.



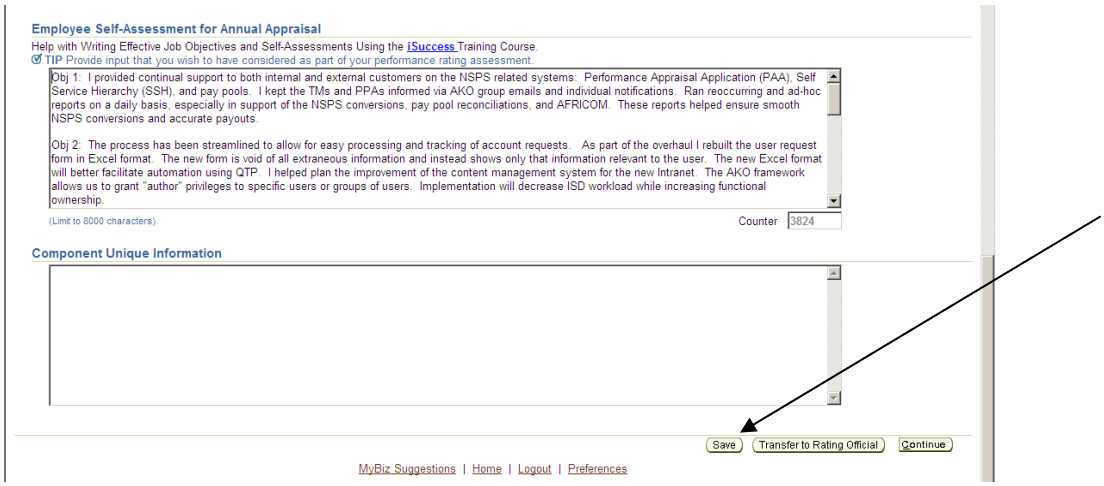
3. Input your self assessment and select the "Save" button. It is recommended that you first type your self assessment into a Word document and then paste it into this section.



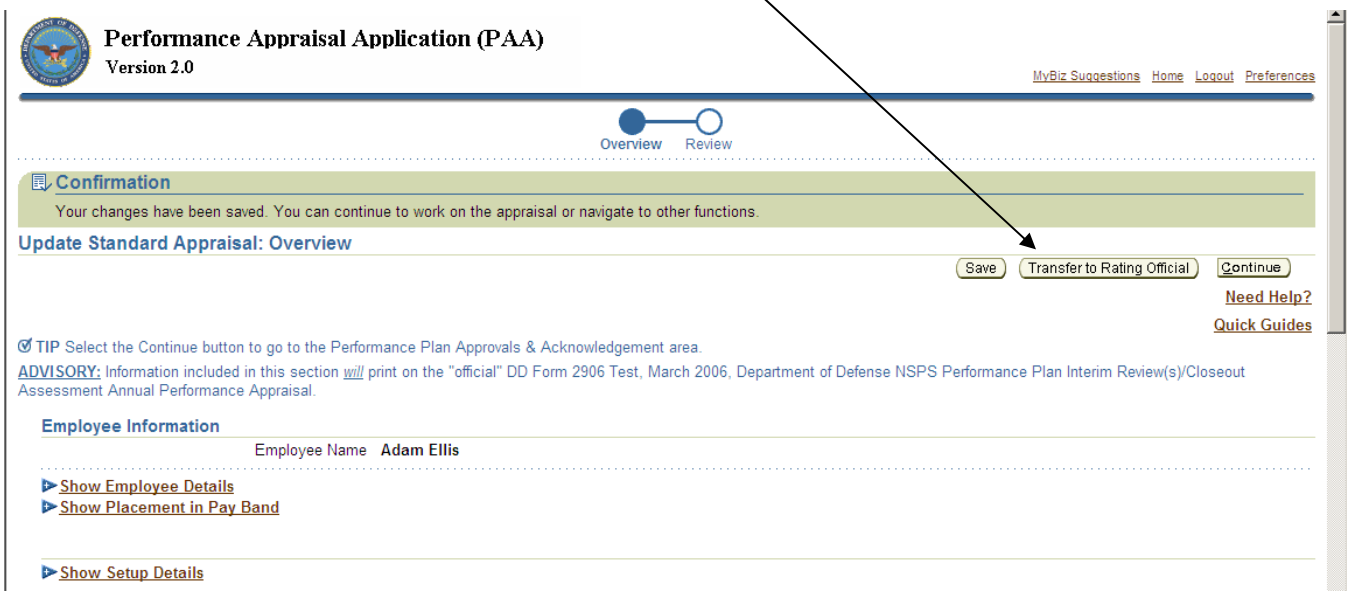
4. You will notice that the status on the Interim Review is now "PENDING." DO NOT write any data in "Employee Self-Assessment for Annual Appraisal" section. This section will be purged on July 1st.



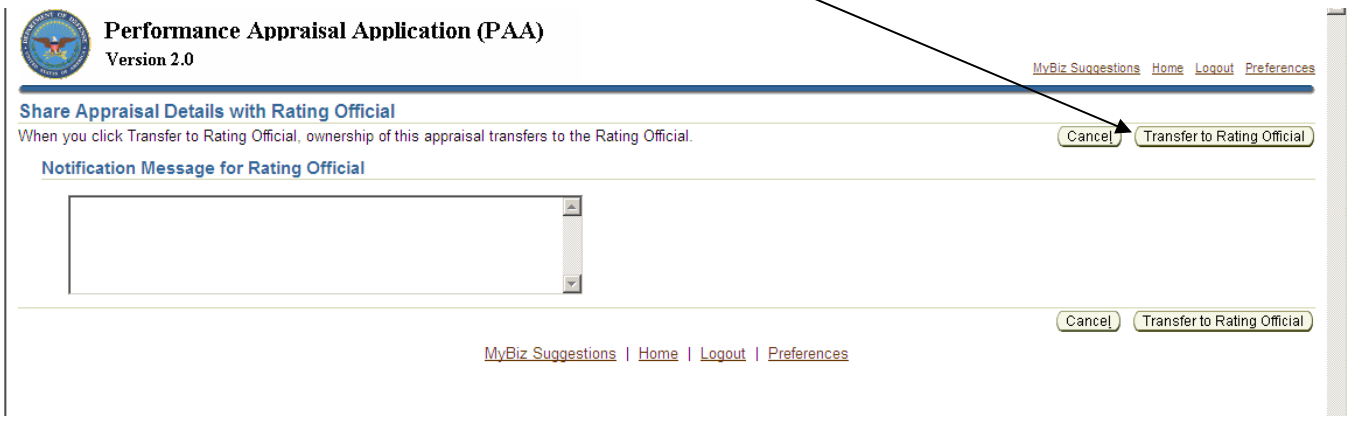
5. Scroll down to the bottom of the page and select the “Save” button.



6. Select the “Transfer to Rating Official” button

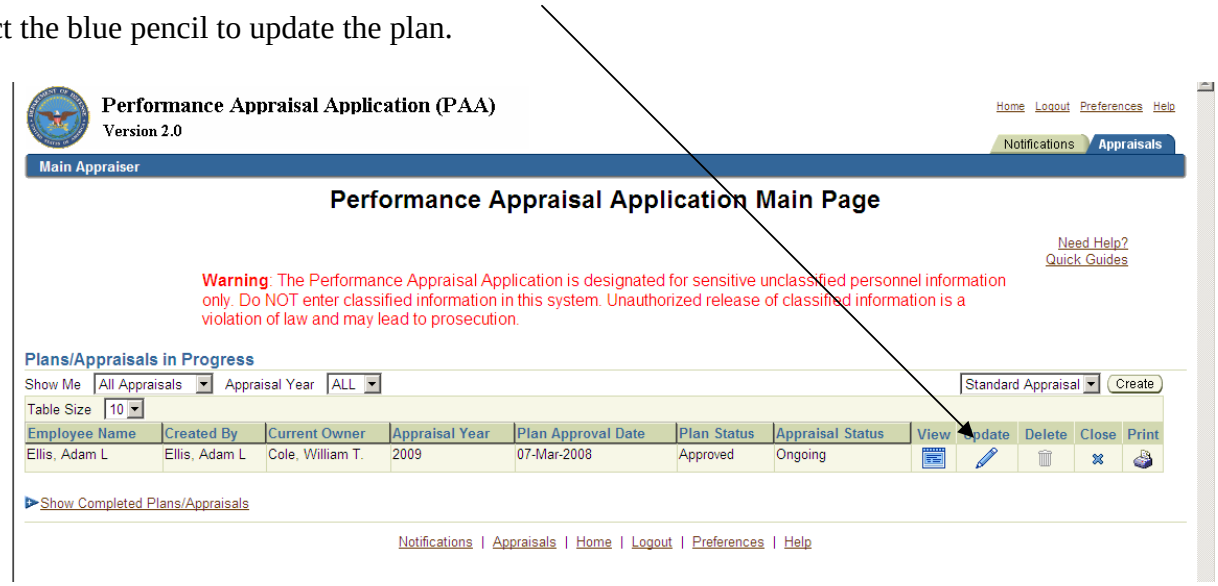


7. Select the “Transfer to Rating Official” button



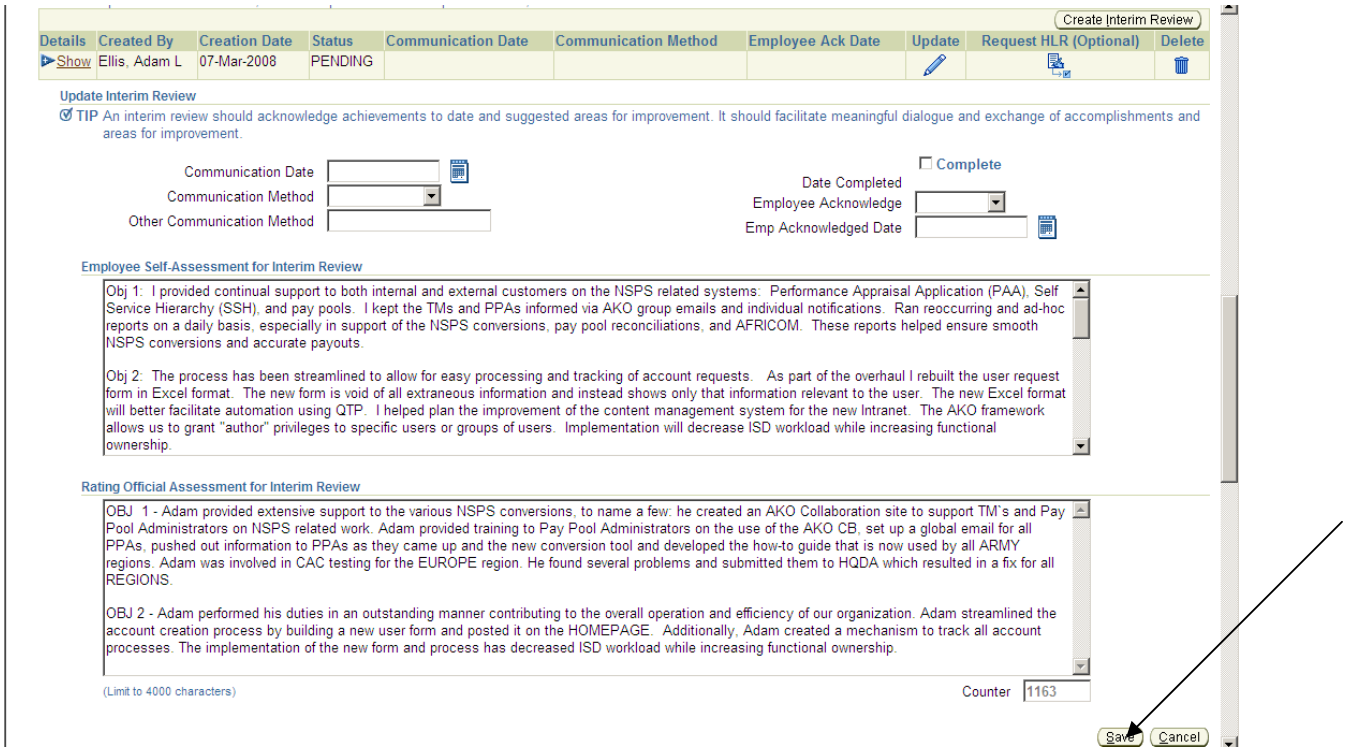
Rating Official Interim Assessment and MOCK Rating

1. Select the blue pencil to update the plan.

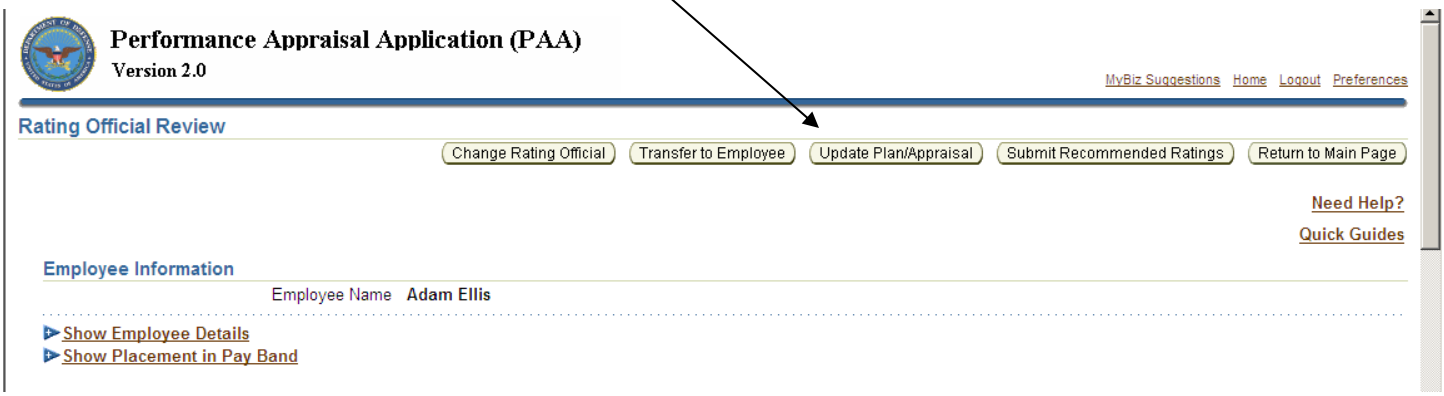


2. Scroll down to the Interim Reviews section and select the blue pencil to update.

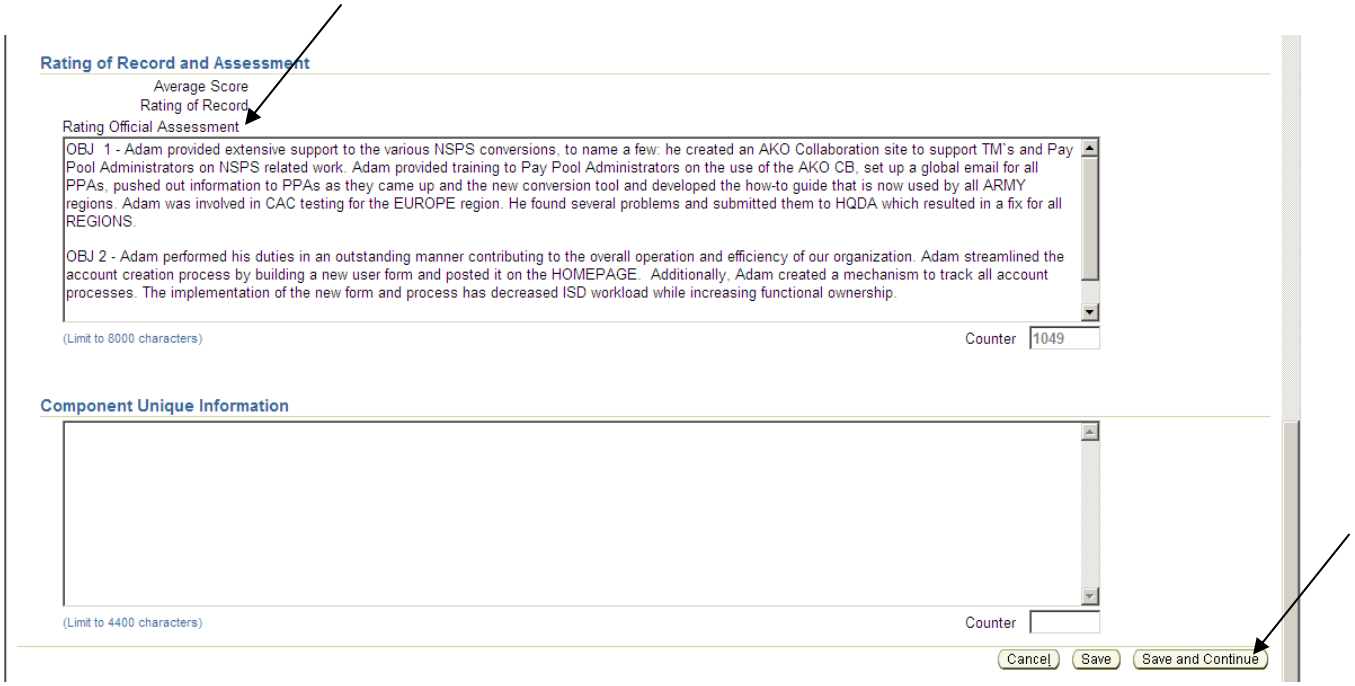
3. Input your assessment and select the "Save" button. It is recommended that you first type your self assessment into a Word document and then paste it into this section.



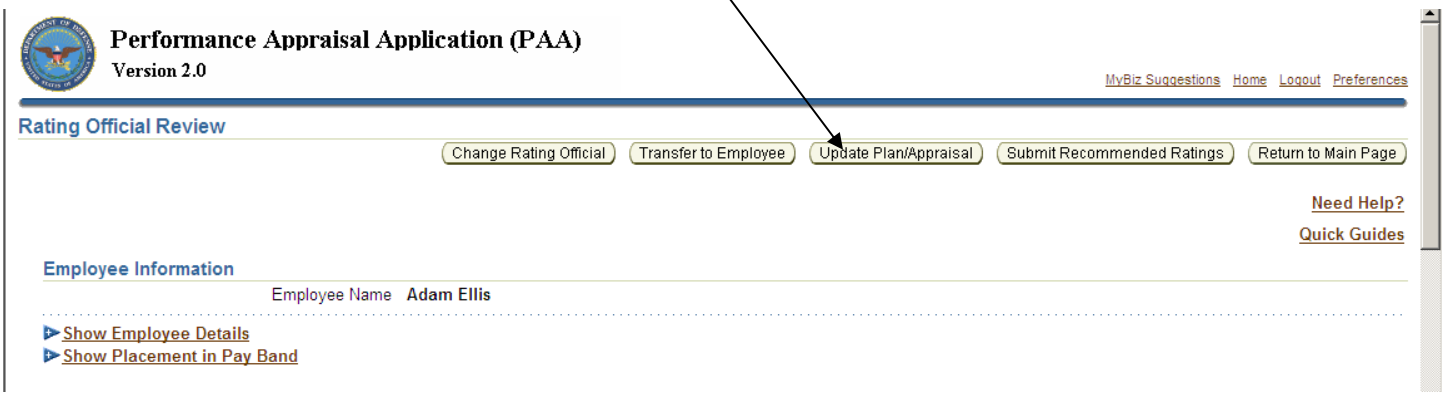
4. Select the “Update Plan/Appraisal” button



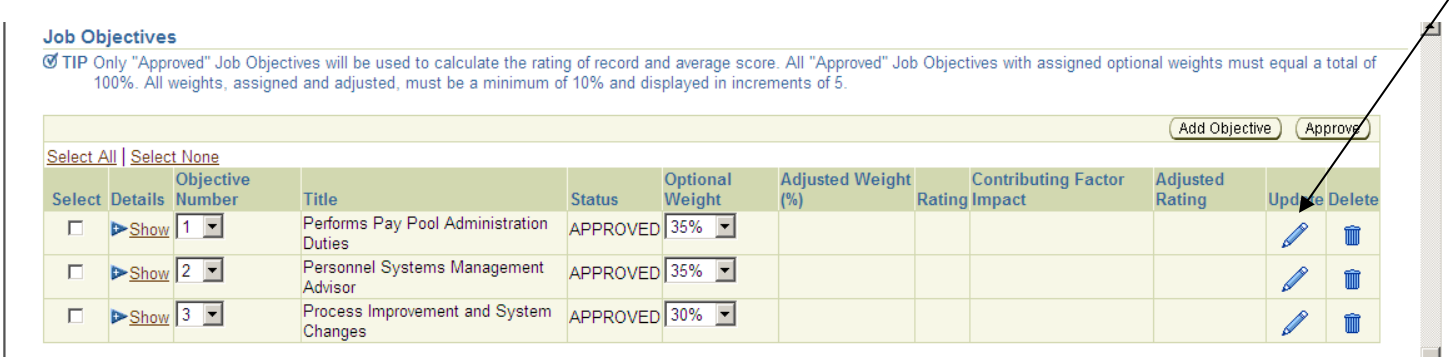
5. Scroll down to the “Rating of Record and Assessment” section. In the Rating Official Assessment section, you should make a note of the MOCK recommended Shares to be awarded and the MOCK Share Distribution. (DEFAULT shares and distribution should be applied – if different, justify the request) in this section. If you did not or could not enter ratings within each objective inside the PAA, then list the individual ratings for each objective and the overall average rating for the MOCK in this block. You may also paste the assessment you used in the Interim Review section. Then select the “Save and Continue” button at the bottom.



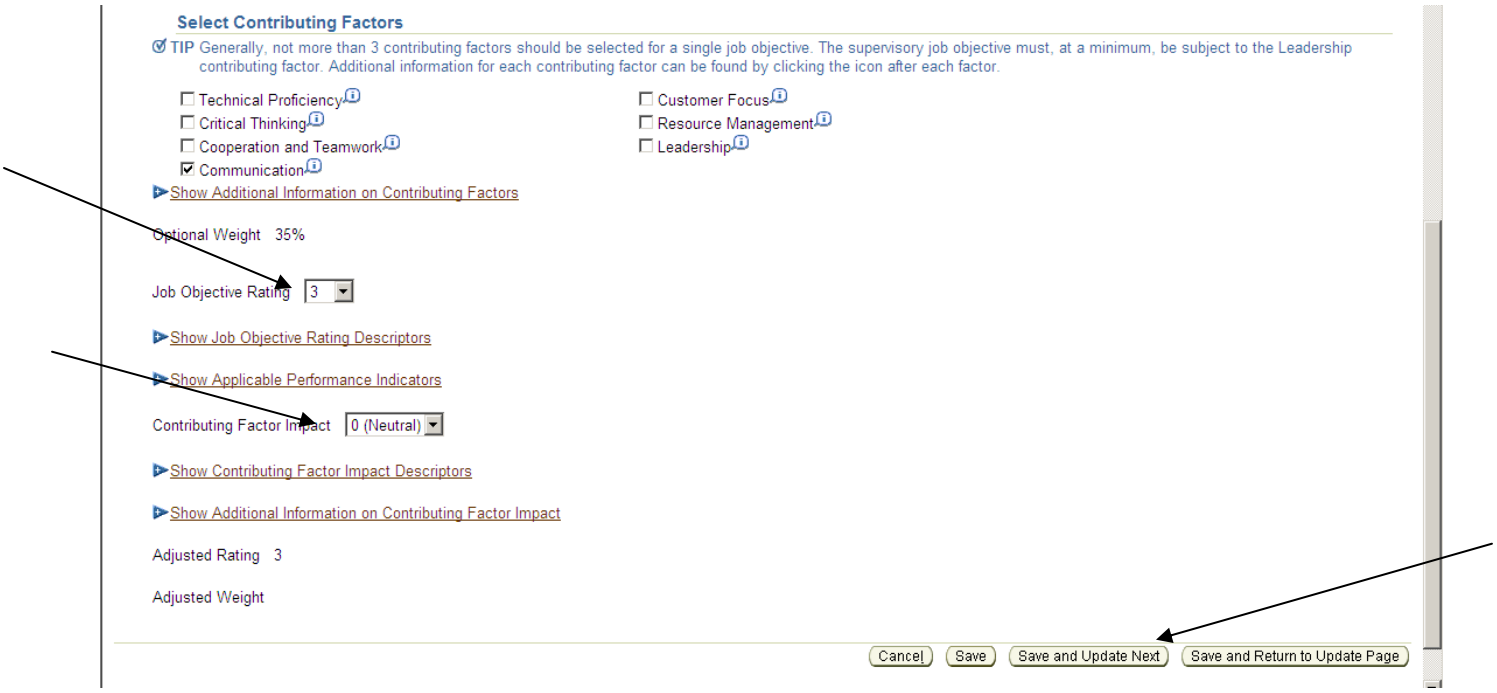
6. Select the “Update Plan/Appraisal” button



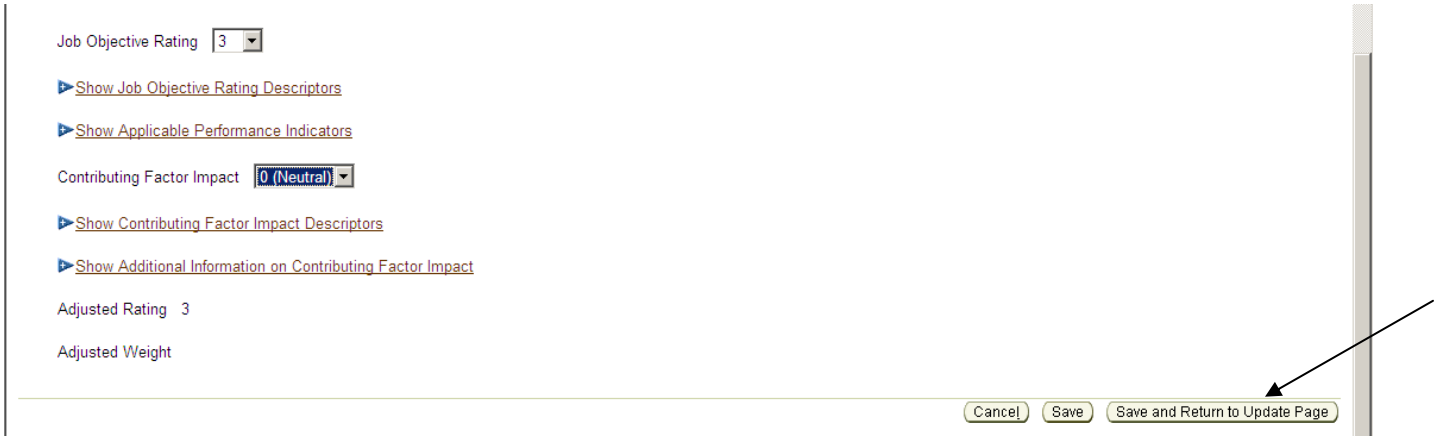
7. Scroll down to the Job Objectives section. Select the blue pencil next to update the objective.



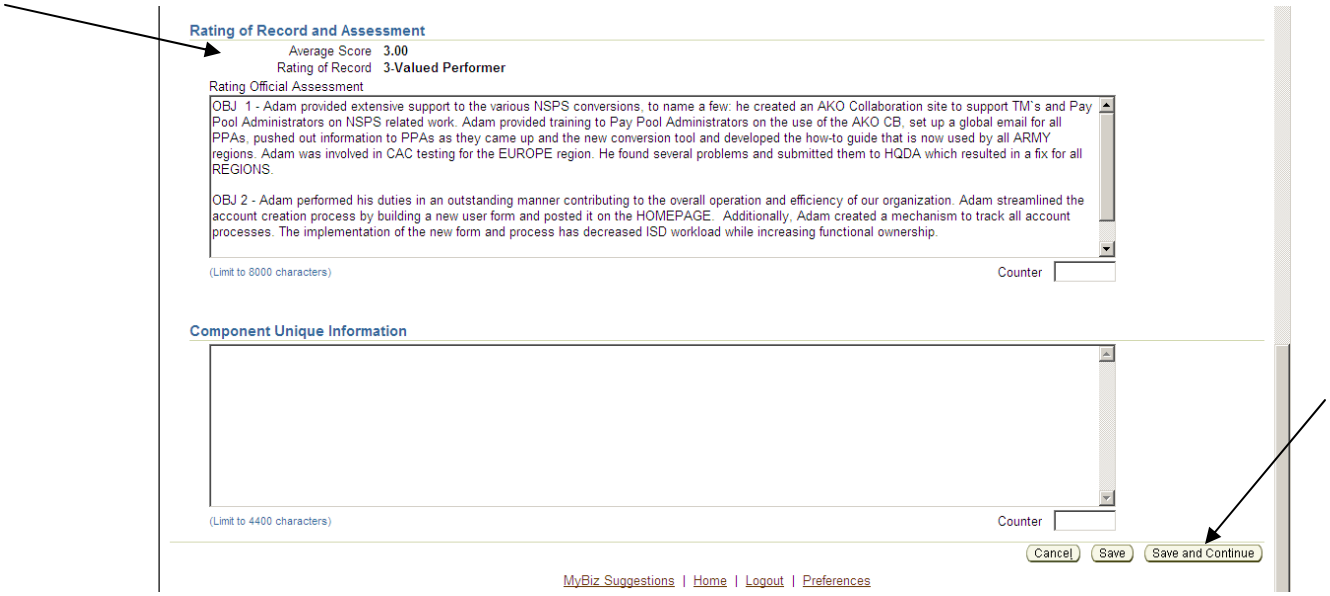
8. Select a rating for the job objective and the contributing factor. Select the “Save and Update Next” button at the bottom to rate the next objective. (NOTE: DoDEA is not using the Optional Weight for this year.)



9. Rate all of the objectives and contributing factors. Select the "Save and Return to Update Page" after you have rated the last objective.

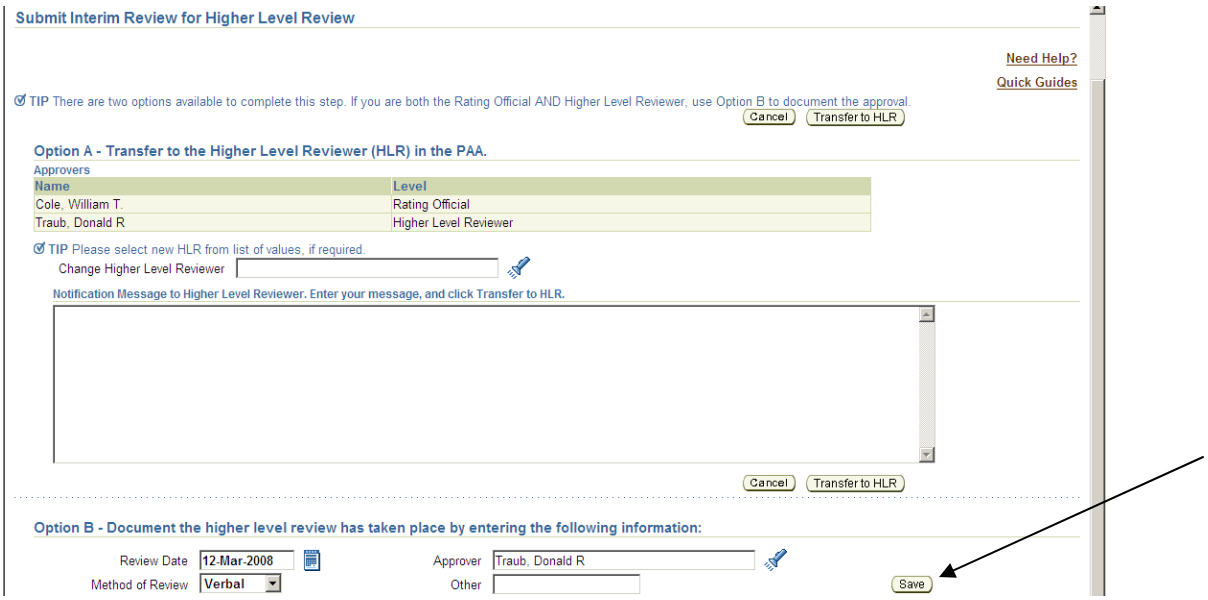


10. You will notice that there is now an overall rating. Select the "Save and Continue" button.

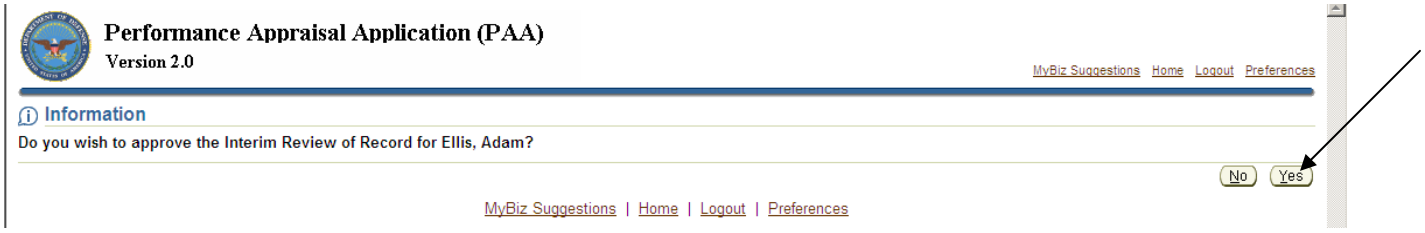


11. You will now need to request HLR approval for the Interim review. Although the PAA states that this is optional, HLR approval is a DoDEA requirement. Select the "Request HLR" icon.

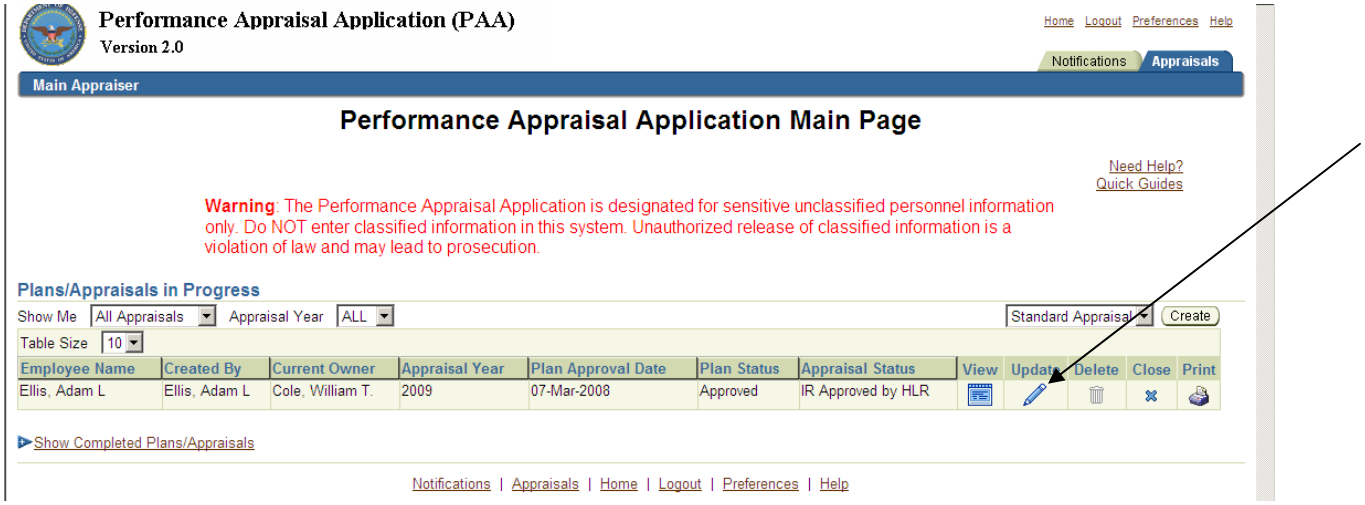
12. You can now either route the PAA to the HLR by selecting the "Transfer to HLR" button or you can document the HLR review if this took place off-line. If done off-line you will need to input a review date and review method. Please note that HLR will not be able to review your mock ratings; they will only be able to see your assessment. The mock ratings will need to be discussed off-line. For this example we are going to say that the HLR review took place off-line and we are going to document that.



13. Select the "Yes" button



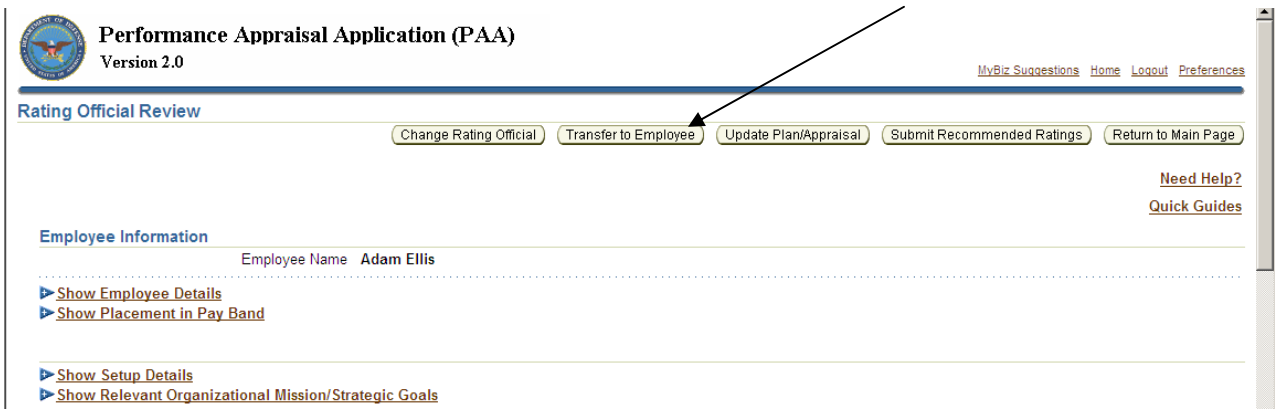
14. Once approved by the HLR, the appraisal will show a status of "IR Approved by HLR." You will now need to meet with the employee to discuss the Interim Review. You are only to discuss the assessment and **NOT** the rating. After you have met with the employee you will need to select the blue pencil to update the plan and document the communication date.



15. Scroll down to the Interim Review section and select the blue pencil to update.

16. Input a communication date and a communication method and then select the "Save" button.

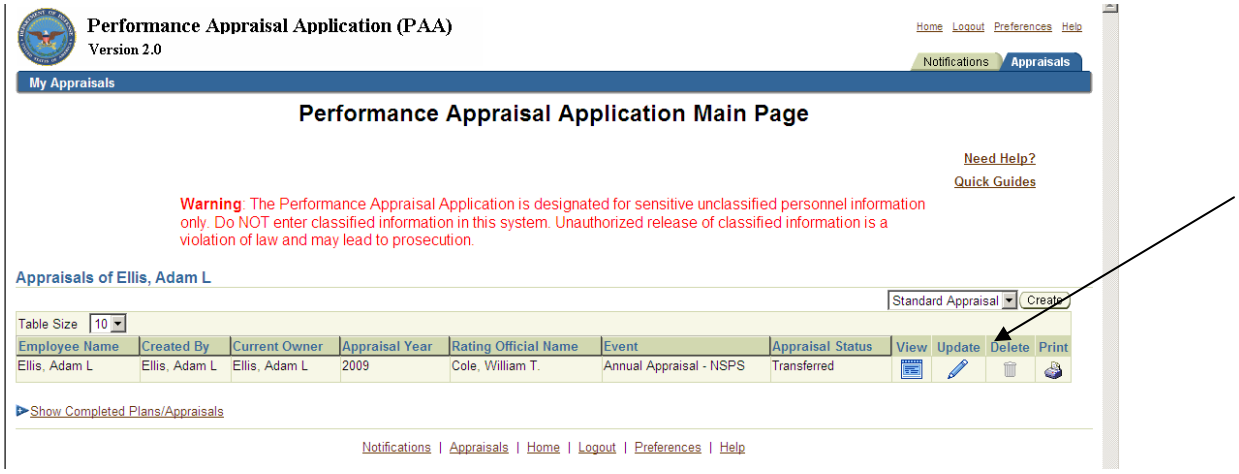
17. Select the “Transfer to Employee” button so they can acknowledge the Interim Review.



18. Select “Transfer to Employee”

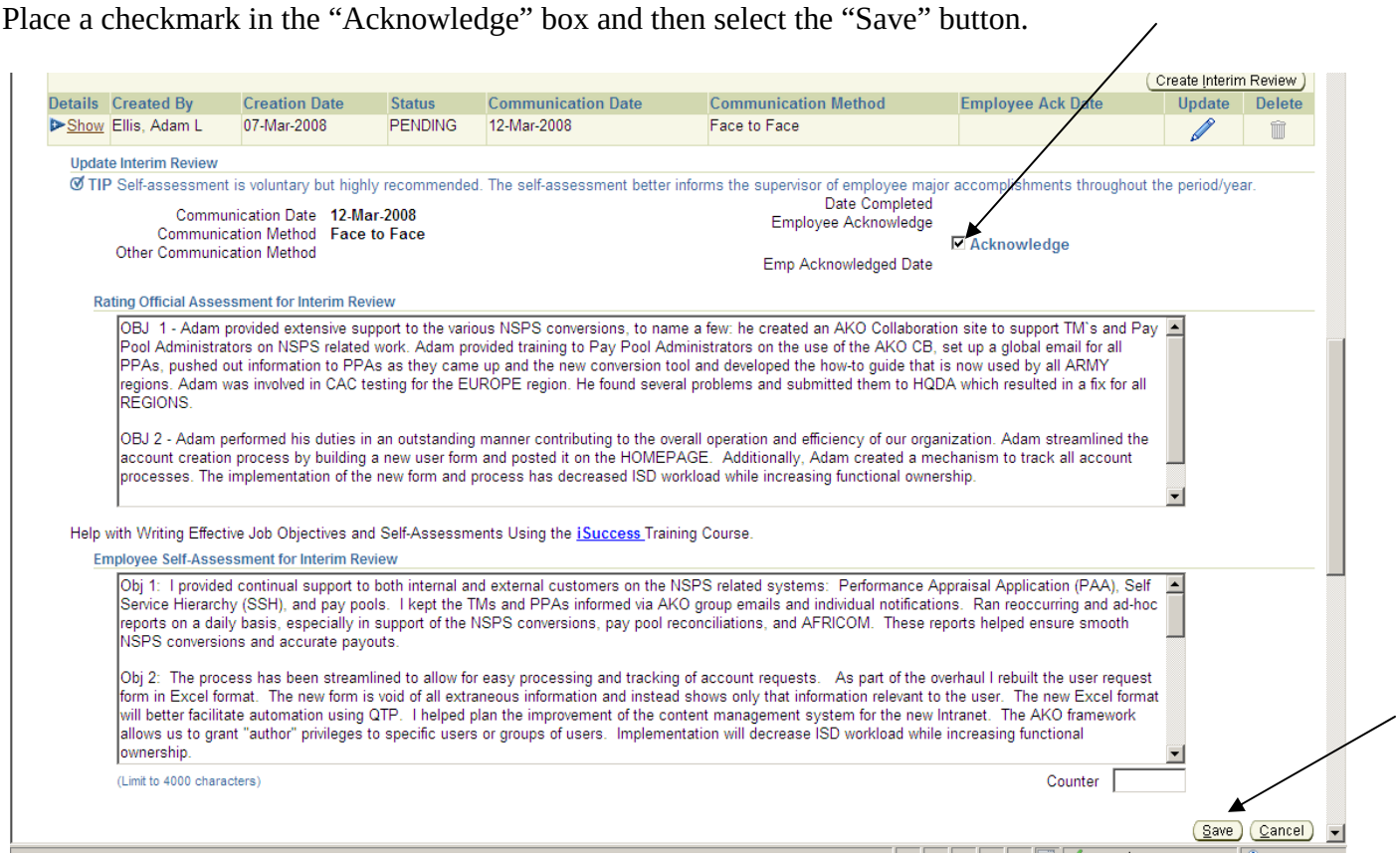
Employee Acknowledgement of Interim Assessment

1. Select the blue pencil to update the plan.

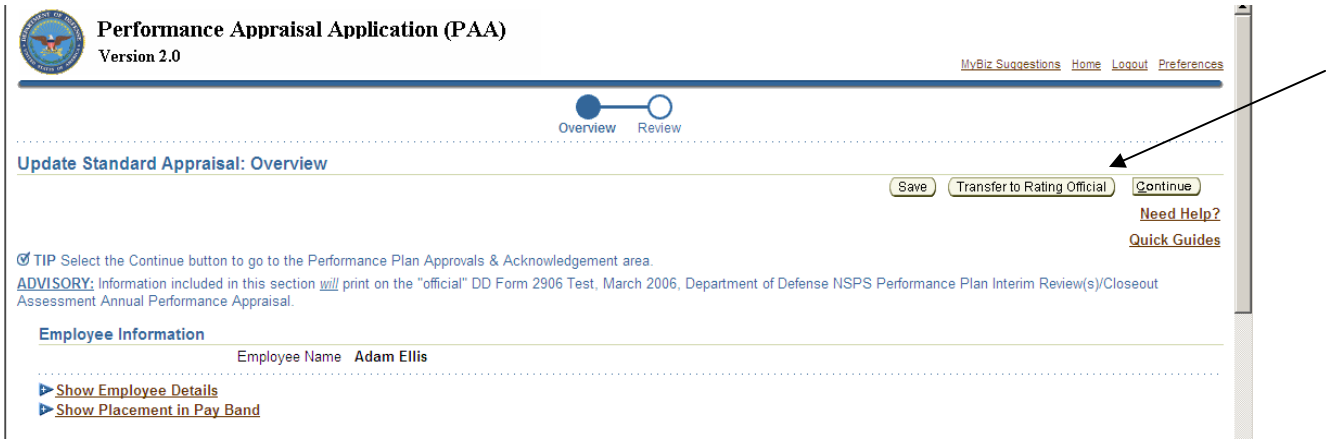


2. Scroll down to the Interim Review section and select the blue pencil to update.

3. Place a checkmark in the "Acknowledge" box and then select the "Save" button.



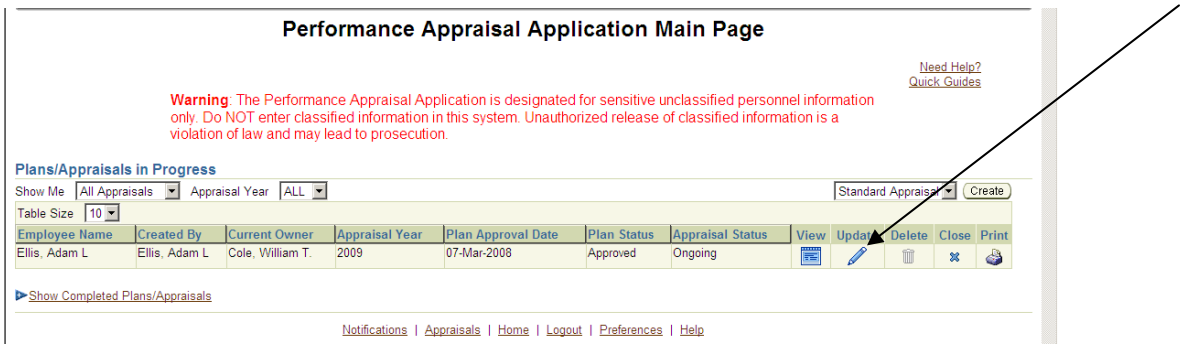
4. Select the “Transfer to Rating Official” button.



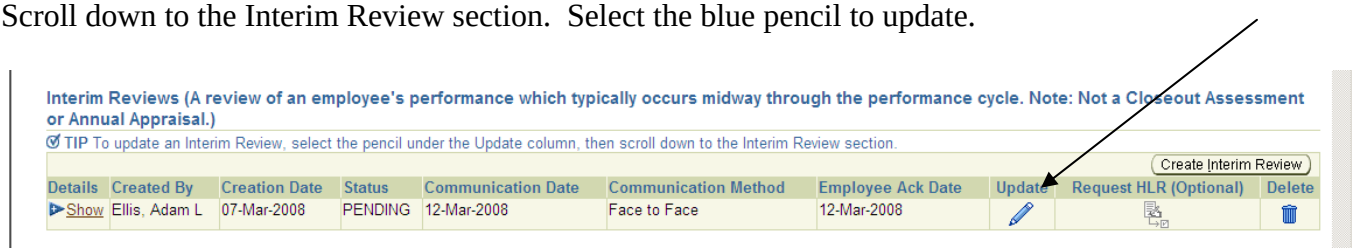
5. Select the “Transfer to Rating Official” button.

Rating Official Completes Interim Review

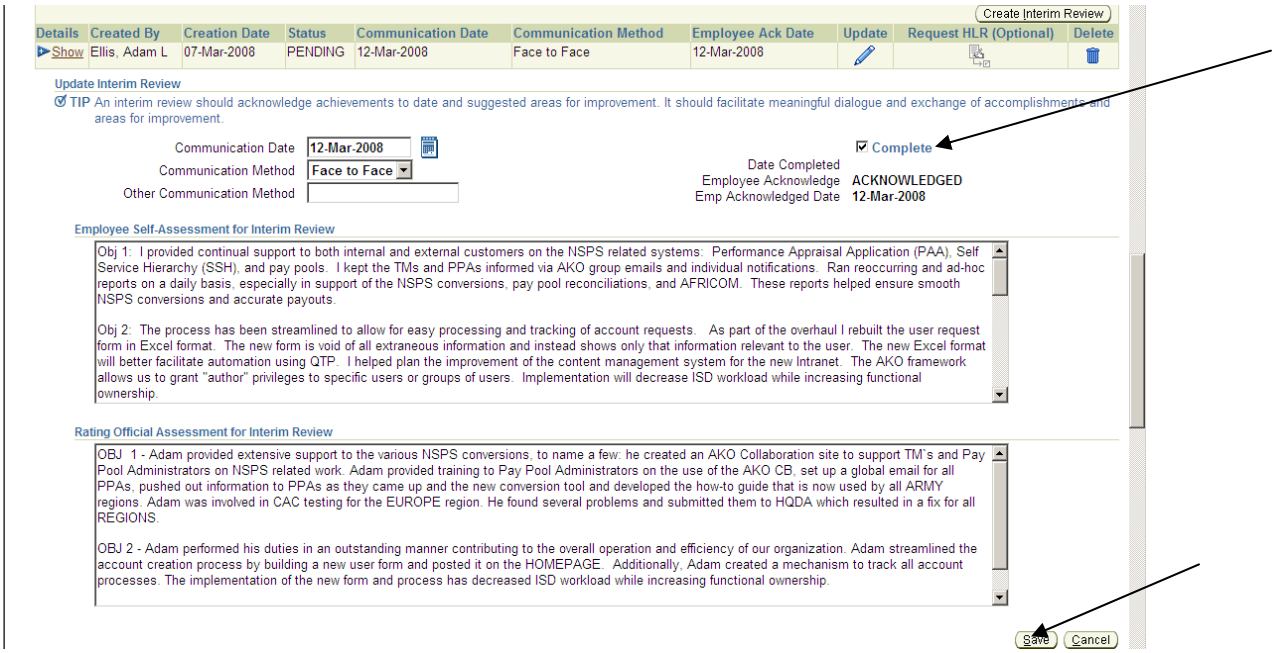
1. Select the blue pencil to update the plan.



2. Scroll down to the Interim Review section. Select the blue pencil to update.



3. Place a checkmark in the "Complete" box and then select the "Save" button.



4. The Interim Review and Mock Rating are now complete.