

# For Rating Officials –

## Interim Review

### Create an Interim Review:

Before beginning the process, you must have an approved Performance Plan.

NOTE: A rating official or employee can create an interim review. To simplify the process, an employee should create the interim review with their Employee Self-Assessment for Interim Review and transfer the interim review to the rating official.

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the Employee's name to view the *Rating Official Review* page.
3. Select the Transfer to Employee button to transfer the appraisal to the employee to create the interim review and obtain the Employee's Self-Assessment for the Interim Review.
4. On the *Performance Appraisal Application Main Page*, select Logout at the top right side of the page to exit.

### Update an Existing Interim Review:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column to the right of the Employee's name to view the *Rating Official Review* page.
3. Scroll down to Interim Reviews.
4. Select the pencil icon in the Update column under Interim Reviews. The Interim Review is in a PENDING status.
5. Scroll down again to Interim Reviews where fields are now available.
6. Enter information into the Rating Official Assessment for Interim Review field.



7. Select the **Save** button to remain on the *Rating Official Review* page. The Interim Review remains in a PENDING status.
8. This step is OPTIONAL - Request Higher Level Review. If not required, go to Step 9.
  - Scroll down to Interim Reviews.
  - Select the Request HLR (Optional) icon to transfer to higher level reviewer or manually document higher level reviewer approval.
  - On the *Performance Appraisal Application Main Page*, select **Logout** at the top right side of the page to exit.
9. Select the **Return to Main Page** button at the top or bottom right corner of the page to view the *Performance Appraisal Application Main Page*.
10. Select **Logout** at the top right side of the page to exit.

### Document Communication of an Interim Review:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column to the right of the Employee's name to view the *Rating Official Review* page.
3. Scroll down to Interim Reviews.
4. Select the pencil icon in the Update column under Interim Reviews.
5. Scroll down again to Interim Reviews where fields are now available.
6. Select the calendar icon to the right of the **Communication Date** field.
7. Use the popup calendar to select the date the Interim Review was communicated.
8. Select the blue down arrow inside the right side of the **Communication Method** field.
9. Select the method you used to communicate the Interim Review to the employee.
10. Select the **Save** button to remain on the *Rating Official Review* page. The Interim Review remains in a PENDING status.
11. Select the **Transfer to Employee** button to allow employee to acknowledge the interim review.
12. On the *Performance Appraisal Application Main Page*, select **Logout** at the top right side of the page to exit.



## Document Completion of an Interim Review:

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column to the right of the Employee's name to view the *Rating Official Review* page.
3. Scroll down to Interim Reviews.
4. Select the pencil icon in the Update column under Interim Reviews.
5. Scroll down again to Interim Reviews where fields are now available.
6. Ensure the Communication Date, Communication Method, and Employee Acknowledge fields have been completed. Note: Employee Acknowledge is not needed to complete the interim review.
7. Select the **Complete** box on the right side of the page, across from the communication date.
8. Select the **Save** button to remain on the *Rating Official Review* page. The Interim Review is now in a COMPLETED status. **NOTE:** The completed interim review has been placed under the Completed Plans/Appraisals area on the *Performance Appraisal Application Main Page*.
9. Select the **Return to Main Page** button at the top or bottom right corner of the page to view the *Performance Appraisal Application Main Page*.
10. Select **Logout** at the top right side of the page to exit.

