

Interim Review and Mock Rating Guide



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	<u>1</u> – 7	2 – 4
Rating Official	<u>1</u> – 18	5 – 11
Employee	<u>1</u> – 5	12 – 13
Rating Official	<u>1</u> – 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.

Performance Appraisal Application (PAA)
Version 2.0

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Appraisals of Ellis, Adam L

Standard Appraisal | Create

Table Size: 10

Employee Name	Created By	Current Owner	Appraisal Year	Rating Official Name	Event	Appraisal Status	View	Update	Delete	Print
Ellis, Adam L	Ellis, Adam L	Ellis, Adam L	2009	Cole, William T.	Annual Appraisal - NSPS	Transferred				

Show Completed Plans/Appraisals

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

Job Objectives

Add Objective

Number	Title	Status	Optional Weight (%)	Update	Delete
1	Performs Pay Pool Administration Duties	APPROVED	35%		
2	Personnel Systems Management Advisor	APPROVED	35%		
3	Process Improvement and System Changes	APPROVED	30%		

Interim Reviews (A review of an employee's performance which typically occurs midway through the performance cycle. Note: Not a Closeout Assessment or Annual Appraisal.)

TIP To update an Interim Review, select the pencil under the Update column, then scroll down to the Interim Review section.

Create Interim Review

Details Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Delete
No results found.							

Closeout Assessments (This section is completed when an employee changes duties and requires a new Performance Plan, or the Rating Official leaves before the end of the appraisal period. Note: Not an Interim Review, Early Annual, or Annual Appraisal.)

TIP To update a Closeout Assessment, select the pencil under the Update column, then scroll down to the Closeout Assessment section.

Create Closeout Assessment

Details Created By	Creation Date	Status	Update	Delete
No results found.				

Employee Self-Assessment for Annual Appraisal

Help with Writing Effective Job Objectives and Self-Assessments Using the [iSuccess](#) Training Course.

TIP Provide input that you wish to have considered as part of your performance rating assessment.

Trusted sites | 100%

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.

Interim Reviews (A review of an employee's performance which typically occurs midway through the performance cycle. Note: Not a Closeout Assessment or Annual Appraisal.)

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Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Delete
No results found.								

Create Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of accomplishments and areas for improvement.

Help with Writing Effective Job Objectives and Self-Assessments Using the [ISuccess](#) Training Course.

Employee Self-Assessment for Interim Review

Obj 1: I provided continual support to both internal and external customers on the NSPS related systems: Performance Appraisal Application (PAA), Self Service Hierarchy (SSH), and pay pools. I kept the TMs and PPAs informed via AKO group emails and individual notifications. Ran reoccurring and ad-hoc reports on a daily basis, especially in support of the NSPS conversions, pay pool reconciliations, and AFRICOM. These reports helped ensure smooth NSPS conversions and accurate payouts.

Obj 2: The process has been streamlined to allow for easy processing and tracking of account requests. As part of the overhaul I rebuilt the user request form in Excel format. The new form is void of all extraneous information and instead shows only that information relevant to the user. The new Excel format will better facilitate automation using QTP. I helped plan the improvement of the content management system for the new Intranet. The AKO framework allows us to grant "author" privileges to specific users or groups of users. Implementation will decrease ISD workload while increasing functional ownership.

(Limit to 4000 characters) Counter 3824

Save **Cancel**

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.

Interim Reviews (A review of an employee's performance which typically occurs midway through the performance cycle. Note: Not a Closeout Assessment or Annual Appraisal.)

TIP To update an Interim Review, select the pencil under the Update column, then scroll down to the Interim Review section.

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Delete
Show	Ellis, Adam L	07-Mar-2008	PENDING					

Create Interim Review

Closeout Assessments (This section is completed when an employee changes duties and requires a new Performance Plan, or the Rating Official leaves before the end of the appraisal period. Note: Not an Interim Review, Early Annual, or Annual Appraisal.)

TIP To update a Closeout Assessment, select the pencil under the Update column, then scroll down to the Closeout Assessment section.

Details	Created By	Creation Date	Status	Update	Delete
No results found.					

Create Closeout Assessment

Employee Self-Assessment for Annual Appraisal

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TIP Provide input that you wish to have considered as part of your performance rating assessment.

Obj 1: I provided continual support to both internal and external customers on the NSPS related systems: Performance Appraisal Application (PAA), Self Service Hierarchy (SSH), and pay pools. I kept the TMs and PPAs informed via AKO group emails and individual notifications. Ran reoccurring and ad-hoc reports on a daily basis, especially in support of the NSPS conversions, pay pool reconciliations, and AFRICOM. These reports helped ensure smooth NSPS conversions and accurate payouts.

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(Limit to 8000 characters) Counter 3824

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

Employee Self-Assessment for Annual Appraisal
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TIP Provide input that you wish to have considered as part of your performance rating assessment.

Obj 1: I provided continual support to both internal and external customers on the NSPS related systems: Performance Appraisal Application (PAA), Self Service Hierarchy (SSH), and pay pools. I kept the TMs and PPAs informed via AKO group emails and individual notifications. Ran reoccurring and ad-hoc reports on a daily basis, especially in support of the NSPS conversions, pay pool reconciliations, and AFRICOM. These reports helped ensure smooth NSPS conversions and accurate payouts.

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(Limit to 8000 characters) Counter 3824

Component Unique Information

MyBiz Suggestions | Home | Logout | Preferences

Save Transfer to Rating Official Continue

6. Select the “Transfer to Rating Official” button

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MyBiz Suggestions Home Logout Preferences

Overview Review

Confirmation
Your changes have been saved. You can continue to work on the appraisal or navigate to other functions.

Update Standard Appraisal: Overview

Save Transfer to Rating Official Continue

Need Help?
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TIP Select the Continue button to go to the Performance Plan Approvals & Acknowledgement area.
ADVISORY: Information included in this section will print on the "official" DD Form 2906 Test, March 2006, Department of Defense NSPS Performance Plan Interim Review(s)/Closeout Assessment Annual Performance Appraisal.

Employee Information

Employee Name Adam Ellis

Show Employee Details
Show Placement in Pay Band
Show Setup Details

7. Select the “Transfer to Rating Official” button

Performance Appraisal Application (PAA)
Version 2.0

MyBiz Suggestions Home Logout Preferences

Share Appraisal Details with Rating Official
When you click Transfer to Rating Official, ownership of this appraisal transfers to the Rating Official.

Cancel Transfer to Rating Official

Notification Message for Rating Official

Cancel Transfer to Rating Official

MyBiz Suggestions | Home | Logout | Preferences

Rating Official Interim Assessment and MOCK Rating

1. Select the blue pencil to update the plan.

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Quick Guides

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Plans/Appraisals in Progress

Show Me All Appraisals Appraisal Year ALL Standard Appraisal Create

Table Size 10

Employee Name	Created By	Current Owner	Appraisal Year	Plan Approval Date	Plan Status	Appraisal Status	View	Update	Delete	Close	Print
Ellis, Adam L	Ellis, Adam L	Cole, William T.	2009	07-Mar-2008	Approved	Ongoing					

Show Completed Plans/Appraisals

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

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TIP To update an Interim Review, select the pencil under the Update column, then scroll down to the Interim Review section.

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
Show	Ellis, Adam L	07-Mar-2008	PENDING						

Create Interim Review

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.

Create Interim Review

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
Show	Ellis, Adam L	07-Mar-2008	PENDING						

Update Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of accomplishments and areas for improvement.

Communication Date

Communication Method

Other Communication Method

Complete

Date Completed

Employee Acknowledgement

Emp Acknowledged Date

Employee Self-Assessment for Interim Review

Obj 1: I provided continual support to both internal and external customers on the NSPS related systems: Performance Appraisal Application (PAA), Self Service Hierarchy (SSH), and pay pools. I kept the TMs and PPAs informed via AKO group emails and individual notifications. Ran recurring and ad-hoc reports on a daily basis, especially in support of the NSPS conversions, pay pool reconciliations, and AFRICOM. These reports helped ensure smooth NSPS conversions and accurate payouts.

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Rating Official Assessment for Interim Review

OBJ 1 - Adam provided extensive support to the various NSPS conversions, to name a few: he created an AKO Collaboration site to support TM's and Pay Pool Administrators on NSPS related work. Adam provided training to Pay Pool Administrators on the use of the AKO CB, set up a global email for all PPAs, pushed out information to PPAs as they came up and the new conversion tool and developed the how-to guide that is now used by all ARMY regions. Adam was involved in CAC testing for the EUROPE region. He found several problems and submitted them to HQDA which resulted in a fix for all REGIONS.

OBJ 2 - Adam performed his duties in an outstanding manner contributing to the overall operation and efficiency of our organization. Adam streamlined the account creation process by building a new user form and posted it on the HOMEPAGE. Additionally, Adam created a mechanism to track all account processes. The implementation of the new form and process has decreased ISD workload while increasing functional ownership.

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Counter 1163

Save Cancel

4. Select the “Update Plan/Appraisal” button

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MyBiz Suggestions Home Logout Preferences

Rating Official Review

Change Rating Official Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings Return to Main Page

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Employee Information

Employee Name Adam Ellis

Show Employee Details
Show Placement in Pay Band

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.

Rating of Record and Assessment

Average Score
Rating of Record
Rating Official Assessment

OBJ 1 - Adam provided extensive support to the various NSPS conversions, to name a few: he created an AKO Collaboration site to support TM's and Pay Pool Administrators on NSPS related work. Adam provided training to Pay Pool Administrators on the use of the AKO CB, set up a global email for all PPAs, pushed out information to PPAs as they came up and the new conversion tool and developed the how-to guide that is now used by all ARMY regions. Adam was involved in CAC testing for the EUROPE region. He found several problems and submitted them to HQDA which resulted in a fix for all REGIONS.

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(Limit to 8000 characters) Counter 1049

Component Unique Information

(Limit to 4400 characters) Counter

Cancel Save Save and Continue

6. Select the "Update Plan/Appraisal" button

Performance Appraisal Application (PAA)
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MyBiz Suggestions Home Logout Preferences

Rating Official Review

Change Rating Official Transfer to Employee Update Plan/Appraisal Submit Recommended Ratings Return to Main Page

Need Help?
Quick Guides

Employee Information

Employee Name Adam Ellis

Show Employee Details
Show Placement in Pay Band

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

Job Objectives

TIP Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned optional weights must equal a total of 100%. All weights, assigned and adjusted, must be a minimum of 10% and displayed in increments of 5.

Add Objective Approve

Select All | Select None

Select	Details	Objective Number	Title	Status	Optional Weight	Adjusted Weight (%)	Rating	Contributing Factor	Adjusted Rating	Update	Delete
<input type="checkbox"/>	Show	1	Performs Pay Pool Administration Duties	APPROVED	35%						
<input type="checkbox"/>	Show	2	Personnel Systems Management Advisor	APPROVED	35%						
<input type="checkbox"/>	Show	3	Process Improvement and System Changes	APPROVED	30%						

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.)

Select Contributing Factors

TIP Generally, not more than 3 contributing factors should be selected for a single job objective. The supervisory job objective must, at a minimum, be subject to the Leadership contributing factor. Additional information for each contributing factor can be found by clicking the icon after each factor.

Technical Proficiency
 Critical Thinking
 Cooperation and Teamwork
 Communication
 Customer Focus
 Resource Management
 Leadership

Show Additional Information on Contributing Factors

Optional Weight 35%

Job Objective Rating 3

Show Job Objective Rating Descriptors

Show Applicable Performance Indicators

Contributing Factor Impact 0 (Neutral)

Show Contributing Factor Impact Descriptors

Show Additional Information on Contributing Factor Impact

Adjusted Rating 3

Adjusted Weight

Cancel Save Save and Update Next Save and Return to Update Page

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

Job Objective Rating

[▶ Show Job Objective Rating Descriptors](#)

[▶ Show Applicable Performance Indicators](#)

Contributing Factor Impact

[▶ Show Contributing Factor Impact Descriptors](#)

[▶ Show Additional Information on Contributing Factor Impact](#)

Adjusted Rating 3

Adjusted Weight

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

Rating of Record and Assessment

Average Score 3.00
Rating of Record 3-Valued Performer

Rating Official Assessment

OBJ 1 - Adam provided extensive support to the various NSPS conversions, to name a few: he created an AKO Collaboration site to support TM's and Pay Pool Administrators on NSPS related work. Adam provided training to Pay Pool Administrators on the use of the AKO CB, set up a global email for all PPAs, pushed out information to PPAs as they came up and the new conversion tool and developed the how-to guide that is now used by all ARMY regions. Adam was involved in CAC testing for the EUROPE region. He found several problems and submitted them to HQDA which resulted in a fix for all REGIONS.

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(Limit to 8000 characters) Counter

Component Unique Information

(Limit to 4400 characters) Counter

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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.

Interim Reviews (A review of an employee's performance which typically occurs midway through the performance cycle. Note: Not a Closeout Assessment or Annual Appraisal.)

TIP To update an Interim Review, select the pencil under the Update column, then scroll down to the Interim Review section.

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
▶ Show	Ellis, Adam L	07-Mar-2008	PENDING						

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.

Submit Interim Review for Higher Level Review

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TIP There are two options available to complete this step. If you are both the Rating Official AND Higher Level Reviewer, use Option B to document the approval.

Option A - Transfer to the Higher Level Reviewer (HLR) in the PAA.

Approvers

Name	Level
Cole, William T.	Rating Official
Traub, Donald R.	Higher Level Reviewer

TIP Please select new HLR from list of values, if required.

Change Higher Level Reviewer

Notification Message to Higher Level Reviewer. Enter your message, and click Transfer to HLR.

Option B - Document the higher level review has taken place by entering the following information:

Review Date:

Approver:

Method of Review:

Other:

13. Select the “Yes” button

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Information

Do you wish to approve the Interim Review of Record for Ellis, Adam?

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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.

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Main Appraiser

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Plans/Appraisals in Progress

Show Me: Appraisal Year:

Table Size:

Employee Name	Created By	Current Owner	Appraisal Year	Plan Approval Date	Plan Status	Appraisal Status	View	Update	Delete	Close	Print
Ellis, Adam L	Ellis, Adam L	Cole, William T.	2009	07-Mar-2008	Approved	IR Approved by HLR	<input type="button" value="View"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>	<input type="button" value="Close"/>	<input type="button" value="Print"/>

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

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Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
Show	Ellis, Adam L	07-Mar-2008	PENDING						

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

Update Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of accomplishments and areas for improvement.

Complete
 Date Completed:
 Employee Acknowledge:
 Emp Acknowledged Date:

Employee Self-Assessment for Interim Review

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(Limit to 4000 characters) Counter

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

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Rating Official Review

[Change Rating Official](#) [Transfer to Employee](#) [Update Plan/Appraisal](#) [Submit Recommended Ratings](#) [Return to Main Page](#)

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Employee Information

Employee Name Adam Ellis

▶ [Show Employee Details](#)
▶ [Show Placement in Pay Band](#)

▶ [Show Setup Details](#)
▶ [Show Relevant Organizational Mission/Strategic Goals](#)

18. Select “Transfer to Employee”

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Rating Official Notification to Employee - Ellis, Adam

[Cancel](#) [Transfer to Employee](#)

Notification Message to Employee
Enter your message, and click Transfer to Employee to share the appraisal with the employee.

[Cancel](#) [Transfer to Employee](#)

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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.

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Show	Ellis, Adam L	07-Mar-2008	PENDING	12-Mar-2008	Face to Face			

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

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

Performance Appraisal Application (PAA)
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MyBiz Suggestions Home Logout Preferences

Overview Review

Update Standard Appraisal: Overview

Save Transfer to Rating Official Continue

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Quick Guides

TIP Select the Continue button to go to the Performance Plan Approvals & Acknowledgement area.

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Employee Information

Employee Name Adam Ellis

Show Employee Details
Show Placement in Pay Band

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

Performance Appraisal Application (PAA)
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MyBiz Suggestions Home Logout Preferences

Share Appraisal Details with Rating Official

When you click Transfer to Rating Official, ownership of this appraisal transfers to the Rating Official.

Cancel Transfer to Rating Official

Notification Message for Rating Official

Cancel Transfer to Rating Official

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Rating Official Completes Interim Review

1. Select the blue pencil to update the plan.

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Show Me: All Appraisals Appraisal Year: ALL Standard Appraisal

Table Size:

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

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
Show	Ellis, Adam L	07-Mar-2008	PENDING	12-Mar-2008	Face to Face	12-Mar-2008			

Update Interim Review

TIP An interim review should acknowledge achievements to date and suggested areas for improvement. It should facilitate meaningful dialogue and exchange of accomplishments and areas for improvement.

Communication Date:

Communication Method:

Other Communication Method:

Complete

Date Completed:

Employee Acknowledge: **ACKNOWLEDGED**

Emp Acknowledged Date: **12-Mar-2008**

Employee Self-Assessment for Interim Review

Obj 1: I provided continual support to both internal and external customers on the NSPS related systems: Performance Appraisal Application (PAA), Self Service Hierarchy (SSH), and pay pools. I kept the TMs and PPAs informed via AKO group emails and individual notifications. Ran reoccurring and ad-hoc reports on a daily basis, especially in support of the NSPS conversions, pay pool reconciliations, and AFRICOM. These reports helped ensure smooth NSPS conversions and accurate payouts.

Obj 2: The process has been streamlined to allow for easy processing and tracking of account requests. As part of the overhaul I rebuilt the user request form in Excel format. The new form is void of all extraneous information and instead shows only that information relevant to the user. The new Excel format will better facilitate automation using QTP. I helped plan the improvement of the content management system for the new Intranet. The AKO framework allows us to grant "author" privileges to specific users or groups of users. Implementation will decrease ISD workload while increasing functional ownership.

Rating Official Assessment for Interim Review

OBJ 1 - Adam provided extensive support to the various NSPS conversions, to name a few: he created an AKO Collaboration site to support TM's and Pay Pool Administrators on NSPS related work. Adam provided training to Pay Pool Administrators on the use of the AKO CB, set up a global email for all PPAs, pushed out information to PPAs as they came up and the new conversion tool and developed the how-to guide that is now used by all ARMY regions. Adam was involved in CAC testing for the EUROPE region. He found several problems and submitted them to HQDA which resulted in a fix for all REGIONS.

OBJ 2 - Adam performed his duties in an outstanding manner contributing to the overall operation and efficiency of our organization. Adam streamlined the account creation process by building a new user form and posted it on the HOMEPAGE. Additionally, Adam created a mechanism to track all account processes. The implementation of the new form and process has decreased ISD workload while increasing functional ownership.

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

Interim Reviews (A review of an employee's performance which typically occurs midway through the performance cycle. Note: Not a Closeout Assessment or Annual Appraisal.)

TIP To update an Interim Review, select the pencil under the Update column, then scroll down to the Interim Review section.

Details	Created By	Creation Date	Status	Communication Date	Communication Method	Employee Ack Date	Update	Request HLR (Optional)	Delete
Show	Ellis, Adam L	07-Mar-2008	COMPLETED	12-Mar-2008	Face to Face	12-Mar-2008			