



# MyPerformance

# (DoD Performance Management and Appraisal Program)

# **Trusted Agent User Guide**

May 6, 2016





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### Manage Trusted Agent Authorization

#### Introduction

1. *Manage Trusted Agent Authorization* allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the DoD Performance Management and Appraisal Program MyPerformance tool for employees they identify for the purpose of documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer's performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance, and the rating official or higher level review retains ownership of the plan. The sole purpose of the trusted agent is to document their decisions in the employee's record. This assignment is accomplished in the 'Manager Functions' area of MyBiz+.

#### **DCPDS Portal**

- To access *MyPerformance tool*, you must first log in to the *DCPDS Portal* at <u>https://compo.dcpds.cpms.osd.mil using your Smart Card (CAC/PIV)</u> or non-Smart Card (non-CAC User ID) and password. From there you will be directed to *MyBiz*+. Performance Management and Appraisal link is located in *Key Services*.
- 2. Log on with your <u>Smart Card (CAC/PIV)</u> or non-Smart Card (non-CAC User ID) and password using the applicable login button on the *DCPDS Portal* page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.



MyPerformance Trusted Agent User Guide



Figure 1- DCPDS Portal Login Page - Certificate Selection

3. Read the *Privacy Act Statement* and select Accept button.







#### Rating Officials (Managers and Supervisors) Accessing Manage Trusted Agent Authorization

1. From the *MyBiz*+ home page under **Manager Functions** in **Key Services**, select the **Manage Trusted Agent Authorization** link.

MyBiz+			Other DCPDS Application	is - ★ Favorites -	Customer Support -	O Help -	Logout	
				Notifications				
		Read / Unread		Title		Start	Date	
		*	DCPDS/MyBiz+ Downtime			20-Apr	2016	
		*	Annual Contact Information	Review.		06-Apr	-2016	
<b>O</b>	•							
• • • • • • • •	• 11							
Velcome The Rater	The information is current as of 20-Apr-2016							
			*	You have 2 unread not	fications.			
Home						***	5.48	
Provide Feedback								
						Add	Reset   Done	
Key Services	O ≓ Other Responsibilities/Applic	ations	0=	Professional Dev	relopment		•	
Manage I	Key Services P Responsibilities: CIVDOD Performance Management F	eports	8	Education: High school graduate or o	ertificate of equivalency			
MyPerformance	CIVDOD REPORTS	stor	3	Training:				
	DoD Performance Appraisal Administr	CALL AND A DECEMBER OF A DE				1071011 (00 5	b-2015 - 0	
Manager Functions	DoD Performance Appraisal Administ	0101		CLB 024 (DAU) COST R eb-2015)	SK ANALYSIS INTRODI	DCTION (09-F		
Manager Functions Performance Management and Appraisal	DoD Performance Appraisal Administ			CLB 024 (DAU) COST R eb-2015) Certification/Licenses:	SK ANALYSIS INTRODI	DC HON (09-Fi		
Manager Functions Performance Management and Appraisal Apply Action(s) to Multiple Employees	Dob Performance Appraisal Administr			CLB 024 (DAU) COST R eb-2015) Certification/Licenses: No Certificates/Licenses	SK ANALYSIS INTROD	DCTION (09-F		
Manager Functions. Performance Management and Appraisal Apply Action(s) to Multiple Employees Manage Trusted Agent Authorization	DeD Performance Appraisal Administ			CLB 024 (DAU) COST R Feb-2015) Certification/Licenses: No Certificates/Licenses	SK ANALYSIS INTRODI Available	DCTION (09-F		
Anager Functions Performance Management and Appraisal Apply Action(s) to Multiple Employees Manage Trusted Agent Authorization View/Print Performance Management Reports	DeD Performance Appraisal Administ			CLB 024 (DAU) COST R eb-2015) Certification/Licenses; No Certificates/Licenses	SK ANALYSIS INTRODI Available	UC TION (09-F-		
Anager Functions Performance Management and Appraisal Apply Action(s) to Multiple Employees Manage Trusted Agent Authorization View/Print Performance Management Reports View Previous Requests	DeD Performance Appraisal Administ			CLB 024 (DAU) COST R reb-2015) Certification/Licenses: No Certificates/Licenses	SK ANALYSIS INTRODI Available	UC TION (09-F-		
Manager Functions Performance Management and Appraisal Apply Action(s) to Multiple Employees Manage Trusted Agent Authorization View/Print Performance Management Reports View Previous Requests CIV Fill Request Status	DeD Performance Appraisal Administ			2LB 024 (DAU) COST RI reb-2015) Certification/Licenses: No Certificates/Licenses	SK ANALYSIS INTRODI	JC 110N (09-1-		
Manager Functions Performance Management and Appraisal Apply Action(s) to Multiple Employees Manage Trusted Agent Authorization View/Print Performance Management Reports View Previous Requests CIV Fill Request Status Update MySupervisor	Ded Performance Appraisal Administ			2LB 024 (DAU) COST R reb-2015) <b>pertification/Licenses</b> No Certificates/Licenses	SK ANALYSIS INTRODI	JC HON (09-F-		

2. You are now on the *Manage Trusted Agent Assignments Page* where you can assign one or more individuals to act on your behalf for documentation purposes.









#### **Manage Trusted Agent Assignments**

#### **Trusted Agent Role**

1. Select the role under the Role drop down menu that the trusted agent will act as on behalf of the Rating Official or Higher Level Reviewer. For this scenario, select Rating Official.

e Trust	ed Agent Assignments is you to assign one or more individuals to act on your behalf for documentation purposes within My Performance. You control their access by assigning a start date and/or end date.	
	AUTHORIZATION FOR TRUSTED AGENT ASSIGNMENT	]
	I hereby authorize the individual indicated below to act as my fusited agent within My Performance for the purpose of documenting performance management events such as the transcription of performance pane, interminingpoint(progress revews, closeout assessmentsharatathe statements and final agorasals into My Performance for the employees exected below. I understand that this does not allewate my performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees and the performance and at the size purpose of the located period.	
	ACKNOWLEDGMENT OF YOUR RESPONSIBILITIES	
	I also understand that I must approve all My Performance events documented by my trusted agent and route the document to the next step by using one of the following methods:	
	<ul> <li>Select the 'Approval Trusted Agent Documentation' button located in the employee's My Performance record under the appropriate Appropriate Approvals and Acknowledgments tab. In the case that I do not have access to My Performance, I understand that my trusted agent may forward the performance plan to the next person in the chain of command to accomplish this task.</li> </ul>	
	<ul> <li>We hundled agent can print a hard copy of the appraisal form and obtain my signature approving the action. My trusted agent can document the fact that this has taken place for the purpose of completing the appraisal form in My Performance.</li> </ul>	L 1

Figure 5 - Manage Trusted Agent Assignments Page - Role

2. Select 'DoD Performance Management Approval Program' and select 'Go' button.

	MyPerformance	
	мер газ	.ogout
Manage Truste This page allow	ed Agent Assignments is you to assign one or more individuals to act on your behalf for documentation purposes within My Performance. You control their access by assigning a start date and/or end date.	Need Help?
	AUTHORIZATION FOR TRUSTED AGENT ASSIGNMENT	
	I hereby authorize the individual indicated below to act as my trusted agent within My Performance for the purpose of documenting performance management events such as the transcription of performance plans, interiminitypoint/progress reviews, closeout assessments/marative statements and final appraisals into My Performance for the employees selected below. I understand that this does not alweive my performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees and the performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees and the performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees and the performance management responsibilities to continue the development of the trusted agent to document in the development of the trusted agent to obcument in the development of the trusted agent to obcument in the development of the trusted agent of the trusted agent to obcument in the development of the trusted agent to obcument in the development of the trusted agent to obcument in the development of the trusted agent of the trusted age	
1	ACKNOWLEDGMENT OF YOUR RESPONSIBILITIES	1
	Lalso understand that I must approve all My Performance events documented by my trusted agent and noute the document to the next step by using one of the following methods:	
	<ul> <li>Select the 'Approve Trusted Agent Documentation' button located in the employee's My Performance necord under the appropriate Approvals and Acknowledgments tab. In the case that I do not have access to My Performance, I understand that my trusted agent may forward the performance plan to the next person in the chain of command to accomplish this task.         <ul> <li>Chain</li> <li>Chain</li> <li>Chain</li> <li>Chain</li> </ul> </li> </ul>	
	My trusted agent can print a hard copy of the appraisal form and obtain my signature approving the action. My trusted agent can document the fact that this has taken place for the purpose of completing the appraisal form in My Performance.	
Trusted Age	Control of the second se	
	* Roke V	
、 、	System type Load attractionate Management Appraisal Program     Gen Defense Union Intelligence Personnel System     Wattoma Guard (They 2)	,

Figure 6 - Manage Trusted Agent Assignments Page – System Type





#### Assigning Trusted Agent for Individual Employee

1. Once you have selected the program, a list of your employees in that program will display. Select employee or employees under the 'Select' column on the results table for whom you want to assign the trust agent authorization.

}										
Trusted Agent Role										
* Role Rating Official  System Type Depformance Management Appraisal Program										
System i pte lood Performance Management Apprasa Program <u>v</u>										
Show Manage Assignment of Trusted Agent for Select Rating Official Delegation Results	ed Employee(s)									
Select All Select None										
Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action				
D Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	× 4			Insert 💟 Apply				
EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	×			Insert 🗸 Apply				
EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	×			Insert 💌 Apply				
EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	Q_			Insert 💌 Apply				

Figure 7 - Manage Trusted Agent Assignments Page – Employee Selection

2. The following fields are required: 'Trusted Agent Name' and 'Start Date'. 'End Date' is an optional field. Enter 'Trusted Agent Name'. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the 'Quick Select' icon next to your selection.

Manage Truste	d Agent Assignments	2	https://warlock121.dcpds.cpm	ns.osd.mil/?_t=fredRC&enc	WINDOWS-1252&_minWidth=750&_min	nHeight=5				
This page allows	you to assign one or more individuals to	act on your behalf for	earch and Select: Trusted Age	ent Name			1			
						Cancel Select				Need Help?
	AUTHORIZATION FOR TRU	ISTED AGENT	Search							
	I hereby authorize the individual indicate assessments/narrative statements and i employees on their performance and the	ed below to act as my final appraisals into M at the sole purpose of	Select a field to 'Search By'. Nex field followed by the '%'; e.g., S initial. For best results, enter las Select the 'Quick Select' icon ne	et, enter a value in the text fie imi% or 02%. The most comm at name followed by the % an at to your selection.	Id. Partial searches must begin with the first non naming convention for Full Name is last i d firstname followed by the %, e.g. Smith%3	few characters of the search name, first name, and middle lohn%. Select the "Go" button.	ins, interim/midpo the hands-on wor	int/progress reviews, k of monitoring, revie	closeout wing and appraising	
	ACKNOWLEDGMENT OF Y	OUR RESPON	Search By Employee Name	Rater%	Go					
	I also understand that I must approve al	I My Performance eve	Results							
	<ul> <li>Select the 'Approve Truster may forward the performant</li> </ul>	f Agent Documentation	Quick Employee				we access to My P	erformance, I unders	tand that my trusted agent	
	OR My trusted agent can print	a hard conv of the and	elect Select Name	Organization	Position	Job	eting the appraisa	I form in Mr. Derform	207.0	
	<ul> <li>my outpour agent carryent.</li> </ul>	a nard copy of the opp	Rater, The	U S ARMY GARRISON FT STEWART HO A	423196.SUPERVISORY BUDGET ANALYST, 1656747, ARBA, APPR	0560.Budget Analysis (0560)	cong the oppraise	i oni i i i i i i i i i i i i i i i i i	on re-to-	
Trusted Ager	it Role					Cancel Select	_			
	* Role Rating Official	4								
	* System Type DoD Performance Manag	ement Appraisal Prog								
	Go	<	<			>				
Show Manage Rating Official I	<ul> <li>Assignment of Trusted Agent for Selected Delegation Results</li> </ul>	1 Employee(s) Aut	to saving in about 14 minute(	\$)		105% •				
Select All Sele	ct.None									
Select Detail	s Employee Name	Employee Number	Organization		Trusted Agent Name	Star	t Date	End Date	Action	
2 = Sho	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV	/1800183 01	Rater%				Insert 🗸	Apply
□ ⊕ Sho	EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SE	RVICES DD07H90000 01					Insert 🗸	SbbtA
□	EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SE	RVICES DD07H90000 01		N			Insert 🗸	Apply
🗆 🕀 Sho	EHRIS Rogzo, Imfytbpp	515436	DLA HUMAN RESOURCES SE	RVICES DD07H90000 01		A			Insert 🕑 🖉	Apply

Figure 8 - Manage Trusted Agent Assignments Page – Trusted Agent Name





3. Enter 'Start Date' (date cannot be a past date). 'End Date' can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.

Trusted Agent Role									
* Role [Rating Official V * System Type [DoD Performance Management Appraisal Program V Go									
Show Manage Assignment of Trusted Agent for Selecte Rating Official Delegation Results	d Employee(s)								
Select All Select None									
Select Details Employee Name	Employee Number	Organization	Trusted Agent Name		Start Date	End Date		Action	
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	" 🔍	21-Apr-2016 ×			Insert 🔽 Apply	
Show EHRIS Clkutmuxe, Jajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01		<u> </u>		· · · · · · · · · · · · · · · · · · ·		Insert V Apply	
EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01		Q				Insert 🗸 Apply	
EHRIS Rogzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01		Q				Insert 🔽 Apply	

Figure 9 - Manage Trusted Agent Assignments Page - Start Date

4. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is Update. A trusted agent has been assigned as a role of rating official for the employee.

Trusted	Agent Role										
	* Role Rating Official										
* System Type   DoD Performance Management Appraisal Program											
	<b>0</b>										
E Show Ma	anage Assignment of Trusted Agent for Selecte	d Employee(s)									
Rating Off	icial Delegation Results										
Rating Off Select All	icial Delegation Results Select None										
Rating Off Select All	Icial Delegation Results Select None etails Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action				
Rating Off Select All	Icial Delegation Results Select None etails Employee Name Show CPMS Czajkowski, Courtney W	Employee Number 545654	Organization NAVAL MEDICAL CENTER NV1800183 01	Trusted Agent Name Rater, The	Start Date 21-Apr-2016	End Date	Action Update V Apply				
Rating Off Select All Select D	Icial Delegation Results Select.None etails [Employee Name chails [Comployee Name (Control of the Caglicowski, Courtney W Show EHRIS Clicutmuxe, Tajvaft	Employee Number 545654 516978	Organization NAVAL MEDICAL CENTER NV1800183 01 DLA HUMAN RESOURCES SERVICES DD07H90000 01	Trusted Agent Name Rater, The	Start Date 21-Apr-2016	End Date	Action Update V Apply Insert V Apply				
Rating Off Select All Select D C C C C C C C C C C C C C C C C C C C	Icial Delegation Results Select None etails [employee Name Shara CPMS Czajkowski, Courtney W Shara EHRIS Clautmuxe, Jajvsft Shara EHRIS Pixatrgpg, Byxkmn	Employee Number 545654 516978 518762	Organization NAVAL MEDICAL CENTER NV1800183 01 DLA HUMAN RESOURCES SERVICES DD07H90000 01 DLA HUMAN RESOURCES SERVICES D007H90000 01	Trusted Agent Name Rater, The	Start Date 21-Apr-2016	End Date	Action Update Apply Insert Apply Insert Apply				
Rating Off Select Al Select D C C C C C C C C C C C C C C C C C C C	kal Delegation Results Select None etails Employee Name Store OMS Czajkowski, Courtey W Store EHRIS Cilutmuze, Jajvist Store EHRIS Roatrypa, Bydomn Store EHRIS Rozo, Imfythpp	Employee Number 545654 516978 518762 515436	Organization NAVAL NEDICAL CENTER NY1800183 01 DLA HUMAN RESOURCES SERVICES D007H90000 01 DLA HUMAN RESOURCES SERVICES D007H90000 01 DLA HUMAN RESOURCES SERVICES D007H90000 01	Trusted Agent Name Rater, The	Start Date	End Date	Action Update V Apply Insert V Apply Insert V Apply Insert V Apply				

Figure 10 - Manage Trusted Agent Assignments Page - Selection

#### Assigning Trusted Agent for Multiple Employees

1. To assign a Trusted Agent for multiple employees, select the **Show Manage Assignment of Trusted Agent for Selected Employee(s)** link.

Truste	ed Agent Role									
J	* Role Rating Official  * System Type DoD Performance	Vanagement Appraisal Program	I							
E Show	r Manage Assignment of Trusted Agent for Se Official Delegation Results All   Select None	lected Employee(s)								
Select	Details Employee Name	Employee Number	Organization	Trusted Agent Name		Start Date	End Date		Action	
	Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	EHRIS Rogzo, Imfytbpp		24-Sep-2015	20-Apr-2016		Update 💌	Apply
	H Show CPMS Czaikowski, Courtney W	\$45654	NAVAL MEDICAL CENTER NV1800183-01		a.				Insert V	Apply
	a manual of the californiand, coursely the	0.1000.1		A			 		Tarata Card	Sec. 1
	Show EHRIS Clikutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01		4	, 	<u> </u>		Insert 💌	Apply
	Show EHRIS Clkutmuxe, Jajvsft     Show EHRIS Fxaxtrgpg, Byokmn	516978 518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01 DLA HUMAN RESOURCES SERVICES DD07H90000 01		a. a.			i	Insert V	Apply Apply

Figure 11 - Manage Trusted Agent Assignments Page – Show Management Assignment of Trusted Agent





2. Assign Trusted Agent and Terminate Trusted Agent section opens

Trusted Agent Role								
Trusted Agent Role	gement Appraisal Program ♥ Employee(s)	1	Terminate Trusted Agent					
To assign a Trusted Agent:		т	To terminate a Trusted Agent:					
1. Finter Trusted Agent Name     2. Enter Start Date     Tip: You cannot enter a past date for Start Date     Signal Start Date     Signal Start Date     Signal Start Date     Signal Start Date     End Date     End Date	d	2	Ender End Date     Tigs: The End Date cannot be earlier than the Start Date.     Sect endproyed) from results table below     Sect Apply button     Find Date     Apply					
Clear Apply								
Rating Official Delegation Results								
Select All Select None	- · · ·					1		
Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action		
Show CPMs Czajkowski, Courtney w	545654	NAVAL MEDICAL CENTER NV1800183 01	EHKIS KCq20, Imiyupp	24-Sep-2015	20-Apr-2016			
STRAW CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01				Insert V Apply		
EHRIS Clkutmuxe, Iajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	x			Insert V Apply		
B Show EHRIS Exaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	s			Insert 🖌 Apply		
EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	u =			Insert V Apply		

Figure 12 - Manage Trusted Agent Assignments Page – Assign Trusted Agent

3. The following fields are required: 'Trusted Agent Name' and 'Start Date'. 'End Date' is an optional field. Enter 'Trusted Agent Name'. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the 'Quick Select' icon next to your selection.

Trusted Agent Role										
* Role Rating Official	7	Search an	d Select: Trusted Agent	Name		0	ancel Select			
* System Type DoD Performance Manag	ement Appraisal Program	Search								
Go		Select a field follo	field to 'Search By'. Next, wed by the '%'; e.g., Smi	enter a value in the text field. % or 0.2%. The most commo	Partial searches must begin with the n naming convention for Full Name is	first few characte last name, first n	ers of the search ame, and middle			
Hide Minage Assignment of Trusted Agent for Selected Employee(s) Hindbates required field Hindbates required field							t the "Go" button.			
Assign Trusted Agent		Search B	y Employee Name 🔽 🛛	ne%	Go		)			
To assign a Trusted Agent:		Results								
1. Enter Trusted Agent Name 2. Enter Start Date Tip: You cannot enter a past date for Start Date.		Select	Quick Employee Select Name	Organization	Position	Job				
<ol> <li>Optionally, enter an End Date to limit assignment period.</li> <li>Select employee(s) from results table below</li> <li>Select 'Apply' button</li> </ol>	od		One, Employee	U S ARMY GARRISON FT STEWART HQ A	244014.BUDGET ANALYST.1657727.ARBA.APPR	056	0.Budget Analysis 50)			
* Trusted Agent Name One%6  * Start Date  End Date	x C					Ca	ncel Select			
Clear Apply		<					>			
Rating Official Delegation Results Select All I Select None		Auto saving	g in about 13 minute(s)				≪ 105% ·	J		
Select Details Employee Name	Employee Number	Organization			Trusted Agent Name		Start Date	End Date	Action	
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL	CENTER NV1800183 01		Rater, The		21-Apr-2016		Update 🕑	Apply
Bhow EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RES	OURCES SERVICES DD07	190000 01		A			Insert 🗸	Apply
EHRIS Fxadrgpg, Byxkmn	518762	DLA HUMAN RESO	OURCES SERVICES DD07	190000 01		] Q			Insert 🗠	Apply
Show EHRIS Regzo, Imfytbpp	515436	DLA HUMAN RES	OURCES SERVICES DD07/	190000 01					Insert 🗸	Apply

Figure 13 - Manage Trusted Agent Assignments Page – Search and Select Trusted Agent Name

4. Enter 'Start Date' (date cannot be a past date). 'End Date' can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select **Apply** button.



NEW BEGIN	NIN	GS	Terminate Trusted Agent			T	'rusted	MyPerformance Agent User Guide
To assign a Trusted Agent:			To terminate a Trusted Agent:					
Enter Trusted Agent Name     Enter Start Date     Tip: You cannot enter a past date for Start     . Optionally, enter an End Date to limit assignmen     Select employee(s) from results table below     Select "Apply" batton	Date. It period		<ol> <li>Enter End Date Tip: The End Date cannot be earlier than</li> <li>Select employee(s) from results table below</li> <li>Select 'Apply' button</li> </ol>	the Start Date.				
* Trusted Agent Nam One, Employee * Start Dat 21-Apr-201 X End Date Clear Apply	, , ,	Q	* End Date Apply					
Rating Official Delegation Results								
Select All Select None Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Actio	0	
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		🔲 Upda	te 🖌 Apply	-
EHRIS Clkutmuxe, Jajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	, Q			Inser	t 🗸 Apply	
EHRIS Exatrapp, Byskmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	🔍			Inser	t 🔽 Apply	
EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	× •			Inser	t 🔽 Apply	

Figure 14 - Manage Trusted Agent Assignments Page – Start Date

5. Select the employees from list you wish to have a trusted agent assigned for and select **Apply** button.

Assign Trusted Agent		т	erminateTrusted Agent			
To assign a Trusted Agent:		Т	terminate a Trusted Agent:			
Enter Trusted Agent Name     Enter Start Date     Tip You cannot enter a past date for Start Date     Optionally, enter an End Date to limit assignment peri     A. Select employee(s) from results table below     S. Select 'Apply' button	ad	1. 2. 3.	Enter End Date Tip: The End Date cannot be earlier than the Select engipyee(s) from results table below Select 'Apply' button	: Start Date.		
* Trusted Agent Name One, Employee * Start Date 21-Apr-2016 End Date Gear Apply			* End Date			
Rating Official Delegation Results						
Select Al Select None Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update 🛩 Apply
Show EHRIS Clkutmuxe, Jaivsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	×			Insert 🗸 Apply
EHRIS Fxaxtrgpg, Byskmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<u>م</u> ا			Insert 💌 Apply
Show EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	»] 🔍			Insert 🔽 Apply

Figure 15 - Manage Trusted Agent Assignments Page – Employee Selection

6. The boxes are no longer available to change Trusted Agent Name or Start Date and the Action is Update. A trusted agent has been assigned as a role of rating official for the employees. A trusted agent can create a plan, input elements, and document the Higher Level Review and communications to employee.

Assign Trusted Agent		TerminateTrusted Agent				
To assign a Trusted Agent:		To terminate a Trusted Agent:				
1. Enter Trusted Agent Name 2. Enter Start Date Tip: You cannot enter a past date for Start Date. 3. optionally, enter an End Date to limit assignment period 4. sidect employee(s) from results table below 5. Select AgeNU button		Erter End Date     Tip: The End Date cannot be earlier than the Start E     Select englowe(s) from results table below     Select 'Apply' button	ate.			
* Trusted Agent Name	٩	* End Date				
* Start Date III		Αρρίγ				
Clear Apply						
Rating Official Delegation Results						
Select All Select None					la at	
Select Details Employee Name Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action	
□	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update 🕑	Apply
□ ⊕ Show EHRIS Clikutmuxe, Tajvsft 516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01				Insert 🗸	Apply
B Show EHRIS Exastrgpg, Byskmn 518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 💌	Apply
☐ ⊕ Show EHRIS Rcqzo, Imfytbpp 515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 💌	Apply

Figure 16 - Manage Trusted Agent Assignments Page





7. To collapse this area, select **Hide Manage Assignment of Trusted Agent for Selected Employee(s)** link.

11000	CU AQCIN NOTC							
	* Role Rating Official	V						
	* System Type DoD Performance M	anagement Appraisal Program						
	Go							
Hide	Manage Assignment of Trusted Agent for Seler ates required field	ted Employee(s)						
Assig	n Trusted Agent			TerminateTrusted Agent				
To ass	sign a Trusted Agent:			To terminate a Trusted Agent:				
1. Entr 2. Entr Tip 3. Opt 4. Sele 5. Sele	es insoleto vigenciame es Start bale : You cannot enter a past date for Start D isonally, enter an End Date to limit assignment ; ect employee(s) from results table below ect 'Apply' button	ate. period		<ol> <li>Enter End Outer</li> <li>Fip: The End Date cannot be earlier than</li> <li>Select employee(s) from results table below</li> <li>Select 'Apply' button</li> </ol>	the Start Date.			
	* Trusted Agent Name  * Start Date End Date Clear Apply	1	a.	* End Date Apply				
Rating Select /	Official Delegation Results All   Select.None							
Select	Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action	
	CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update 🔽	Арр
	⊕ Show EHRIS Clkutmuxe, Jajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	× 9.			Insert 🔽	App
	Show Exections, Basimo	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🗸	APP
	an summer in some dhat players							_

Figure 17 - Manage Trusted Agent Assignments Page – Hide Manage Assignment of Trusted Agent

Trust	ed Agent Role								
	* Role Rating Official	~							
	* System Type DoD Performance Management Appraisal Program								
	<u>G</u> 0								
+ Show Rating	Manage Assignment of Trusted Agent for Selecte Official Delegation Results	d Employee(s)							
Select /	All Select None								
Select	Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action		
	🕀 Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update 🖌 Apply		
	Show EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	a			Insert 🔽 Apply		
	Show EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🖌 Apply		
	Show EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🗸 Apply		

Figure 18 - Manage Trusted Agent Assignments Page



### **Terminate Trusted Agent Authorization for Individual Employee**

1. Select employee under the Select column to terminate trusted agent authorization. Note: End Date must be blank.

Manage Tru	sted Agent Assignments							
This page all	ows you to assign one or more individu	uals to act on your behalf	for documentation purposes within My Performance. You cont	rol their access by assigning a start date and/	or end date.			Need Help?
	AUTHORIZATION FOR T	RUSTED AGENT	ASSIGNMENT trusted agent within My Performance for the purpose of docu	menting performance management events su	h as the transcription of	performance plans, interim/mk	dpoint/progress	
	on work of monitoring, reviewing an	rative statements and fin id appraising employees	al appraisals into My Performance for the employees selected on their performance and that the sole purpose of the trusted a	pelow. I understand that this does not alleviate igent is to document my decisions in the empl	my performance manage byee's My Performance re	ement responsibilities to conti ecords.	nue the hands-	
	ACKNOWLEDGMENT O	F YOUR RESPON	ISIBILITIES					
	I also understand that I must appro	ve all My Performance ev	ents documented by my trusted agent and route the document	t to the next step by using one of the following	methods:			
	<ul> <li>Select the 'Approve Tru understand that my trus OR</li> <li>My trusted agent can p</li> </ul>	isted Agent Documentation sted agent may forward the rint a hard copy of the ap-	on' button located in the employee's My Performance record un e performance plan to the next person in the chain of comman praisal form and obtain my signature approving the action. My	nder the appropriate Approvals and Acknowled at to accomplish this task.	igments tab. In the case t	that I do not have access to My	y Performance, I aisal form in My	
	Performance.	internate copy of the op	nabar term and obtain my signature approximity are accordingly		as taken pace for the pa	apose of completing the uppro	alou lotti in ing	
								1
Trusted A	jent Role							
	* Role Rating Official	V						
	* System Type DoD Performance	Management Appraisal F	rogram					
	<u>G</u> o							
Show Man Rating Offic	age Assignment of Trusted Agent for S al Delegation Results	elected Employee(s)						
Select bet	elect None	Employee Number	Organization	Tructed Agent Name	Start Date	End Date	Action	
	IOW CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016		Update 🗸	Apply
	KW EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	A		╺└┼────	Insert 💌	Apply
	IOW EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🔽	Apply
	IOW EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🔽	Apply

Figure 19 - Figure 19 - Manage Trusted Agent Assignments Page - Terminate Trusted Agent

2. Enter End Date – The end date entered will take affect at the end of the day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date. Select **Apply** button.

Trust	ed Agent Role						
	* Role Rating Official	~					
	* System Type DoD Performance	Management Appraisal P	Program 🔽				
	Go						
E Show	v Manage Assignment of Trusted Agent for S Official Delegation Results	elected Employee(s)					
Select /	All Select None				_		
Select	Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action
	Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016 ×	Update 💌 Apply
	Show EHRIS Clkutmuxe, Jajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	м (с			Insert 🖌 Apply
	Show EHRIS Fxaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🖌 Apply
	Show EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🔽 Apply

Figure 20 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent



### **Terminate Trusted Agent Authorization for Multiple Employees**

1. To terminate trusted agent authorization for multiple employees, enter End Date.

Trusted Agent Role								
* Role Rating Official	Y							
* System Type DoD Performance	e Management Appraisal	Program						
Go								
Hide Manage Assignment of Trusted Agent for S Indicates required field	Selected Employee(s)							
Assign Trusted Agent			TerminateTrusted Agent					
To assign a Trusted Agent:		To terminate a Trusted Agent:						
Enter Trusted Agent Name     Enter Start Date     Tip: You cannot enter a past date for Sta     Optionally, enter an End Date to limit assignm     Select enployee(s) from results table below     Select 'Apply' button	<b>irt Date.</b> ient period		Enter End Date     Tip: The End Date cannot be earlier than t     Select enjoyee(s) from results table below     Select 'Apply' button	he Start Date.				
* Trusted Agent Name  * Start Date End Date Clear Appl	]	. Q	* End Date 22-Apr-2016					
Rating Official Delegation Results								
Select All   Select None Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action		
Estow CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	Update	~	Apply
Bhow CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	× 4			Insert	~	Apply
B Show EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	, Q	[		Insert	V	Apply
Show EHRIS Exaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update	~	Apply

Figure 21 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

2. Select the employees under the Select column to terminate trusted agent authorization. Note: End Date must be blank. Select **Apply** button.

Trusted Agent Role							
* Role Rating Official	~						
* System Type DoD Performance	Management Appraisal F	rogram					
Go							
Hide Manage Assignment of Trusted Agent for Se     *Indicates required field	ected Employee(s)						
Assign Trusted Agent			TerminateTrusted Agent				
To assign a Trusted Agent:			To terminate a Trusted Agent:				
Enter Trusted Agent Name     Inter Start Date     Tip: You cannot enter a past date for Start     Stochamber and Date to limit assignme     Select employee(s) from results table below     S. Select Apply button     * Trusted Agent Name	t Date. nt period		Enter End Date     The: The End Date cannot be earlier than the :     Sectempore(s) from results table below     Select Apply button     * End Date     [22-Apr-2016]	Start Date.			
* Start Date							
End Date			Apply				
Clear Apply							
Rating Official Delegation Results							
Select All Select None							
Select Details Employee Name	Employee Number	Organization	Trusted Agent Name	Start Date	End Date	Action	
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	Rater, The	21-Apr-2016	22-Apr-2016	Update ⊻	Apply
Show CPMS Czajkowski, Courtney W	545654	NAVAL MEDICAL CENTER NV1800183 01	<u>ч</u>			Insert 🗸	Apply
Show EHRIS Clkutmuxe, Tajvsft	516978	DLA HUMAN RESOURCES SERVICES DD07H90000 01	<u>م</u> الا			Insert 🗸	Apply
Show EHRIS Exaxtrgpg, Byxkmn	518762	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🗹	Apply
EHRIS Rcqzo, Imfytbpp	515436	DLA HUMAN RESOURCES SERVICES DD07H90000 01	One, Employee	21-Apr-2016		Update 🔽	Apply

Figure 22 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent





3. End dates have been applied and end dates entered will take affect at the end of the day, so the supervisor or the new trusted agent will not be allowed to enter any data until the next day.

TerminateTrusted Agent			
To terminate a Trusted Agent:			
<ol> <li>Enter End Date Tip: The End Date cannot be earlier than</li> <li>Select employee(s) from results table below</li> <li>Select 'Apply' button</li> </ol>	the Start Date.		
* End Date 🗐			
Trusted Agent Name	Start Date	End Date	Action
Rater, The	21-Apr-2016	22-Apr-2016	Update 🗸 Apply
×			Insert 🗸 Apply
0 01			Insert 🗸 Apply
0 01 One, Employee	21-Apr-2016	22-Apr-2016	Update 🔽 Apply
0 01 🔄 🔍		1	Insert 🖌 Apply
0 01 One, Employee	21-Apr-2016	22-Apr-2016	Update 🖌 Apply
	Terminate i rusted Agent         To terminate a Trusted Agent:         1. Exerce Text Date         Tip: The End Date         2. Select employe(s) from results table below         3. Select 'Apply' button         * End Date         Apphy         * End Date         Rater, The         Rater, The         001       0.0	Terminate I rusted Agent         To terminate a Trusted Agent:         1. Enter End Date         Tip: The End Date cannot be earlier than the Start Date.         2. Select "applye's from results table below         3. Select "Apply button         * End Date         Apply         Trusted Agent Name         Start Date         Rater, The         21-Apr-2016         001         One, Employee         21-Apr-2016	Terminate Trusted Agent:         1. Enter End Date       Tip: The End Date cannot be earlier than the Start Date.         2. Select imployee(s) from results table below       3. Select 'Apply' button         * End Date       Start Date         Find Date       Start Date         Rater, The       21-Apr-2016         Rater, The       21-Apr-2016         101       One, Employee         101       One, Employee

Figure 23 - Manage Trusted Agent Assignments Page – Terminate Trusted Agent

### Acting as Trusted Agent

The information provided below directs the user to the portal link and walks the user through the access process with follow-on directions to the DoD Performance Management and Appraisal Program.

#### **DCPDS Portal**

- To access *MyPerformance tool*, you must first log in to the *DCPDS Portal* at <u>https://compo.dcpds.cpms.osd.mil using your Smart Card (CAC/PIV) or non-Smart Card</u> (non-CAC User ID) and password. From there you will be directed to *MyBiz*+. *MyPerformance* link is located in *Key Services*.
- 2. Log on with your <u>Smart Card (CAC/PIV)</u> or non-Smart Card (non-CAC User ID) and password using the applicable login button on the *DCPDS Portal* page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.



MyPerformance Trusted Agent User Guide



Figure 24 - DCPDS Portal Login Page - Certificate Selection

3. Read the *Privacy Act Statement* and select the Accept button.

Privacy A	Act Statement
The information you provi	de to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your
personal information plea: Authorities: 5 U.S.C. Chi volumes 1100 and 1401	Je contact your local Human Resources Office. apters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, 20 CFB 1614 641 and E 0 3907
Principal Purposes: To a information.	Illow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal
Routine Uses: None. The Disclosure: Voluntary, He	DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system. xwever, failure to provide or update your information may require manual HR processing or the absence of some information.
	Accept
	Accessibility/Section 508   Privacy and Security Policy   System Helo Desk Contacts





4. From the *MyBiz*+ home page, Other Responsibilities/Applications has to be part of your views to select CIV Trusted Agent responsibility. Select **CIV Trusted Agent** link.

				Other DCPDS Applicati	ons - 🗙 Favorites -	Customer Support -	Help - Logout		
UNITED STATES	What's Your New Year's Resc	olution?		Notifications					
	Check out the		Read / Unread			Start Date			
	Civilian Expeditionary Workford		*	DCPDS/MyBiz+ Downtime		21-Apr-201			
	It's the Opportunity of a Life	atimal	*	Annual Contact Informatio	n Review.		21-Apr-2016		
C RAL COM	it's the opportunity of a Life	eanner (							
		,							
		200 00 00 00 00 00 00 00 00 00 00 00 00							
elcome, Employee One		The information is current as of 21-Apr-2	16		You have 2 unread not	ifications.			
lome							414 - 44		
lome							*****		
Home Provide Feedback							Add   Reset   Dor		
Home Provide Feedback	0=	# Other Responsibilities/A	plications	0=	📚 Professional Dev	velopment	Add   Reset   Dor		
Home Provide Feedback	o ≓ Manage Key Services 👂	# Other Responsibilities/Aj Responsibilities: CIV Tristed Agent	plications	0 =	Professional Dev Education:	velopment	Add   Reset   Dor		
Home Provide Feedback # Key Services WyPerformance	© ≓ Manage Key Services 🗭	# Other Responsibilities/Aj Responsibilities: CIV Trusted Agent	plications	0 #	Education: Business Administration I Bachelor's degree - (200	velopment and Management, Gener 6)	Add   Reset   Dor O		
Home Provide Feedback  Key Services  MyPerformance Request Employment Verification	© ≓ Manage Key Services 🗭	# Other Responsibilities/A Responsibilities: CIV Trusted Agent \$ Insurance	plications	0 # 0 #	Education: Business Administration I Bachelor's degree - (2004 Training:	velopment and Management, Gener 6)	Add   Reset   Dor		
Home Provide Feedback  KyPerformance Request Employment Verification Civilian Career Report	© ≓ Manage Key Services 🗭	# Other Responsibilities/A Responsibilities: CIV Trusted Agent \$ Insurance Health Insurance: Federal Em	plications	©≓ ©≓ Special Code (ZZ)	Professional Dev Education: Business Administration I Bachelor's degree - (200 Training: CLM 021 (DAU) INTRO T DCO) (06-Jan 2015 - 07 -	velopment and Management, Gener 6) TO REDUCING TOTAL ( Jan-2015)	Add   Reset   Dor Add   Reset   Dor ral (520201)		
Home Provide Feedback  KyPerformance Request Employment Verification Update Professional Development	© ≓ Manage Key Services 🖓	Other Responsibilities/A Responsibilities: CIV Trusted Agent     Ś Insurance     Health Insurance: Federal Em Life Insurance: Basic only	plications	O ≓ O ≓ Special Code (ZZ)	Professional Dev Education: Business Administration I Bachelor's degree - (200 Training: CLM 021 (DAU) INTRO T TOC) (06-Jan 2015- 07- Certification/Licenses:	velopment and Management, Gener 6) TO REDUCING TOTAL ( Jan-2015)	Add   Reset   Dor Add   Reset   Dor Ral (520201)		
Home Provide Feedback Key Services MyPerformance Request Employment Verification Civilian Career Report Update Professional Development SF50 Personnel Actions	© ≓ Manage Key Services ₽	## Other Responsibilities/A         Responsibilities:         CIV Trusted Agent         Sinsurance         Health Insurance:       Federal Em         Life Insurance:       Basic only	plications loyee Health Benefits	0 ≓ 0 ≓ Special Code (ZZ)	Professional Det     Business Administration I     Bachelor's degree - (200)     Training:     CLM 021 (0AU) INTRO T     TOC) (06-Jan 2015 007-     Certification/Licenses;     No Certificates/Licenses;	velopment and Managemant, Gener 6) TO REDUCING TOTAL ( Jan-2015) Available	Add   Reset   Dor Add   Reset   Dor add (520201) CONNERSHIP COST(R-		

#### Acting as Trusted Agent under CIV Trusted Agent Responsibility

1. Select Acting as Trusted Agent link under CIV Trusted Agent

Department of ]	Defense
Dracle Applications Home Page	
Navigator	
CIV Trusted Agent	CIV Trusted Agent  Acting as Trusted Agent View My Trusted Agent Authorizations  CCIPS PAA Action(s) to Multiple Employees as Trusted Agent View My Requests
My Biz and associated web pages are web-based tools nd management of their personal personnel records. Ti as no association with any private or other enterprise u	created by the Department of Defense (DoD) as part of the Defense Civilian Personnel Data System (DCPDS) to allow DoD personnel access to he DoD My Biz and associated tools can be accessed only by authorized DoD personnel within a .mil or dodea.edu network. The DoD My Biz too sing "My Biz" in whole or in part as a title or logo."

Figure 27 - Navigator – CIV Trusted Agent – Acting as Trusted Agent





#### 2. You are now on the MyPerformance Main Page as the Trusted Agent.

								MyBiz+ FAQ I	telp Home Logout
Trusted Agent									
			MyPerfo	rmance Main	Page				
									Need Hein?
									THE SALL PERSON
	Warning: This applic classified information	cation is designed for sensitive is a violation of law and may I	unclassified personnel infor ead to prosecution.	mation only. Do NOT e	nter classified information in th	is system. Unau	thorized release of	ŧ.	
From the Main Page, you can create, update	e and view employee Perform	ance Plans; change the Rating Official	and/or Higher Level Reviewer; vi	ew and print part or an entir	e plan after it is created; close a plan,	and track the statu	s of a plan.		
You can also search for completed plans by	selecting the 'Show Complete	ed Plans/Appraisals' link located at the	bottom of this page. You are limit	ted to viewing only the Plans	/Appraisals that you have participated	in as a Trusted Ag	ent.		
To create a Performance Plan:	To complete other actions de	escribed above:							
<ul> <li>Select 'Choose a Plan Type'</li> <li>Select 'Appraisal Plan Type'</li> <li>Select the 'Go' button</li> </ul>	<ul> <li>Select an option from</li> <li>Select the Go' button</li> </ul>	the Action column							
Important: To become familiar with the co	olumns, select the 'Need Help'	?' link.							
Plans/Appraisals In Progress									
TIP Only Employees that have a plan in	progress are listed below.								
Trusted Agent forChoose One	~							Create New Plan	
Appraisal Year ALL							Choose a Plar	n Type	✓ Go
Records Displayed 10 V									
Employee Name C	urrent Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Туре	Plan Status	Current Status	Action
No search conducted.									
Select the link to search for Completed Plan	5								



3. Select the drop down arrow next to Trusted Agent to select the employee you are Trusted Agent for.

			MyPerfo	rmance Main	Page				
									Need Help?
	Warning: This a classified information	application is designed for sensitive ation is a violation of law and may	e unclassified personnel info lead to prosecution.	rmation only. Do NOT e	nter classified information in th	is system, Una	thorized release o	6	
rom the Main Page, you can create, u	pdate and view employee Pe	eformance Plans; change the Rating Office	and/or Higher Level Reviewer; vi	iew and print part or an entit	e plan after it is created; close a plan,	and track the state	is of a plan.		
ou can also search for completed plan	s by selecting the 'Show Cor	mpleted Plans/Appraisals' link located at th	e bottom of this page. You are limi	ited to viewing only the Plan	s/Appraisals that you have participated	i in as a Trusted Ag	ent.		
o create a Performance Plan:	To complete other acti	ons described above:							
Select 'Choose a Plan Type'     Select 'Appraisal Plan Type'     Select the 'Go' button	<ul> <li>Select an option</li> <li>Select the Go' b</li> </ul>	n from the Action column sotton							
mportant: To become familiar with the	te columns, select the 'Need	i Help?' link,							
Plans/Appraisals In Progress									
Contraction of the local distance of the loc	at a	ow.							
TIP Only Employees RO - EHRIS Y. Trusted Agent for Apprasar Year ALL	zgfotzfz, Nvmuyezct Z	to will the Tructed Agent he action as?	i				-Choose a Plan	Create New Plan	₩ Go
TIP Only Employees RO - EHRIS Y Trusted Agent for Appraise tree ALL  conds Displayed	aqfotzfz, Nvmuyezet Z	to will the Trusted Agent be acting as?	1				Choose a Plan	Create New Plan	V 60

Figure 29 - MyPerformance Main Page Trusted Agent For

4. You can select an Appraisal Year by selecting the drop down arrow next to Appraisal Year or leave as ALL. From this screen, you can create, update and/or view a performance plan/appraisal. You have the same responsibilities as the rating official.





usten willetig												
			M	lyPerform	nance Main Pa	age						
											and black	
										.0	Rect Pres	्य
	Warning: This classified inform	application is designed for sensit action is a violation of law and m	tive unclassified per ay lead to prosecut	rsonnel informat	tion only. Do NOT ente	r classifi	ed informatio	n in this system. Unauthorized	release of			
om the Main Page, you c	an create, update and view employee P	erformance Plans; change the Rating Of	ficial and/or Higher Lev	el Reviewer; view a	and print part or an entire pl	an after it	is created; close	a plan, and track the status of a plan				
u can also search for cor	npleted plans by selecting the 'Show Co	impleted Plans/Appraisals' link located a	t the bottom of this pag	e. You are limited t	to viewing only the Plans/Ap	praisals th	at you have part	icipated in as a Trusted Agent.				
create a Performance P	fan: To complete other ac	tions described above:										
Select 'Choose a Pla     Select 'Appraisal Pla     Select the 'Go' butte	an Type'  • Select an option in Type' • Select the Go'	n from the Action column button										
ortant: To become fa	miliar with the columns, select the 'Nee	d Help? link.										
portant: To become fa	miliar with the columns, select the Nee	d Help?' link.										
portant: To become fa	miliar with the columns, select the 'Nee organisa	d Help?' link.										
aportant: To become fa Nams/Appraisals In Pr TIP Only Employees th	miliar with the columns, select the 'Nee oppress at have a plan in progress are listed be	d Help?' link. kw.				-	_			-	-	
Apportant: To become fa	miliar with the columns, select the Nee corress at have a plan in progress are listed be HRIS Yzgfotzfz, Nymuyext Z	d Help?' link. low.		_		-	_		Create New F	¥an		
portant: To become fa ans/Approximate in Pa TIP Only Employees th Trusted Agent fo Appraisal Year	miliar with the columns, select the Nee orgress at have a plan in progress are listed be HRIS Yaqfotdz, Nvmuyeat Z	d Help? link. kow,	_			-		-0	Create New F cose a Plan Type	Yan	V	Ge
portant: To become fa Intro /Appraisable In Po "TIP Only Employees th Trusted Agent fo Appraisal Year Autority Control (10) Condo Displayed (10)	miliar with the columns, select the 'Nee opress at have a plan in progress are listed be HRIS Yzqfotdź, Nymuyezst Z	d Help?' link. low,		_				-0	Create New P cose a Plan Type	Man	V	Ge
Appretant: To become fa	miliar with the columns, select the Nee opress at have a plan in progress are listed be HRIS Yzqfotdź, Nymuyezet Z	d Help?' lnk. low.  Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current Status	Create New F cose a Plan Type-	Man		G
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5. For additional guidance on how to create or edit a performance plan/appraisals and approvals and acknowledgments as a rating official, see the MyPerformance (DoD Performance Management and Appraisal Program) Rating Official Guide (Supervisors and Managers).

#### View My Trusted Agent Authorizations

1. Select View My Trusted Agent Authorizations link under CIV Trusted Agent in the Navigator pane.

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CIV Trusted Agent	CIV Trusted Agent Acting as Trusted Agent View My Trusted Agent Authorizations DCIPS PAA Action(s) to Multiple Employees as Trusted Agent View My Requests

**Figure 31 - Navigator Page – View My Trusted Agent Authorizations** 

2. The View My Trusted Agent Authorizations screen shows who you are a trusted agent for, and what role – rating official or higher level reviewer you occupy for each employee assigned to you.

**NOTE:** DCIPS PAA Action(s) to Multiple Employees as Trusted Agent and View My Request links are not part of the DoD Performance Management and Appraisal Program. These links are used by Defense Civilian Intelligence Personnel System.

