



Performance Plan Development

Employees, administrators, and rating officials can create new employee performance plans or import plans from a previous year if certain conditions are met. This includes having an active plan the previous rating cycle. For FY24, rating officials will need to copy and paste appraisal information from DOI Talent or manually enter the data into USA Performance for the first year.

Administrators and rating officials can also create new employee performance plans by importing plans from another employee if certain conditions are met. For rating officials, this includes both employees reporting to the rating officials. For administrators, this includes the administrator having access to both employees.

It is important to note that once a user navigates away from the plan, the import options are no longer available.

Create a New Performance Plan

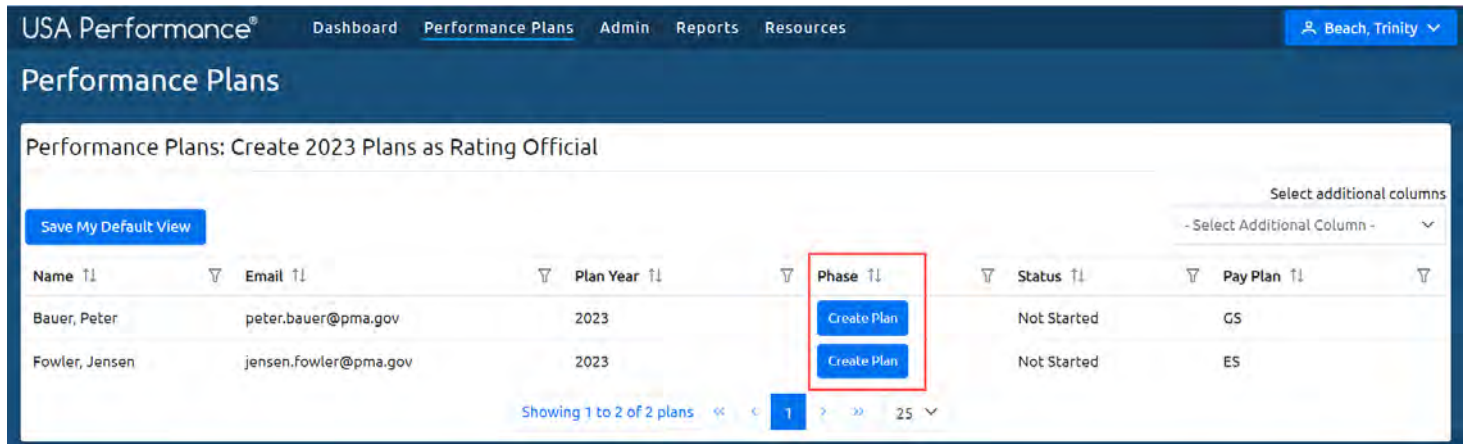
1. From the **Dashboard** page, click **Create 2024 Plans**. This may appear below *My Active Plans* or *My Employees' Plans* depending on your role. Employees developing their own plan should proceed to step four below.

The screenshot shows the USA Performance Dashboard interface. At the top, there are navigation tabs: Dashboard, Performance Plans, Admin, Reports, and Resources. The user profile for Trinity Beach, Chief Information Officer, is visible. The main content area is divided into three sections:

- Tasks Requiring My Attention:**
 - My Active Plans:** A message states "You have no pending tasks for your plans."
 - Admin Tasks:**
 - Assign Employees to Non-SES Template (16)
 - Assign Employees to Rating Cycle Groups (12)
 - Assign Rating and Reviewing Officials (17)
 - Enter SSNs for Employees (61)
 - User Certification Due 5/11
- My Employees' Plans:**
 - Sign 2020 Plans as Rating Official (2)
 - Sign 2022 Plans as Rating Official (1)
 - Certify 2022 Employee Self-Accomplishment Narratives and Sign Plans (Optional) (1)
 - Sign 2023 Plans as Rating Official (2)
 - Create 2023 Plans (2)** (highlighted with a red box)
 - Release 2023 Plans to Reviewing Official (1)
- Quick Links:**
 - Performance Plan:**
 - View My 2023 Plan (Active)
 - View My 2022 Plan (Active)
 - View My Employees' Active Plans
 - Help:**
 - Contact the Help Desk

2. For administrators or rating officials, the **Performance Plans** page will open filtered to show employee plans available to create.

3. Click **Create Plan** next to the employee name. You will be asked to confirm your action. Click **Yes, Create Plan**.



4. The plan will open. To develop the plan, either follow guidance to import plan information from a previous year, import plan from another employee, or proceed to editing current performance elements.

Import Plan from Another Employee Plan – Administrators and Officials Only

Import Plan from Another Employee Plan once an initial plan has been created

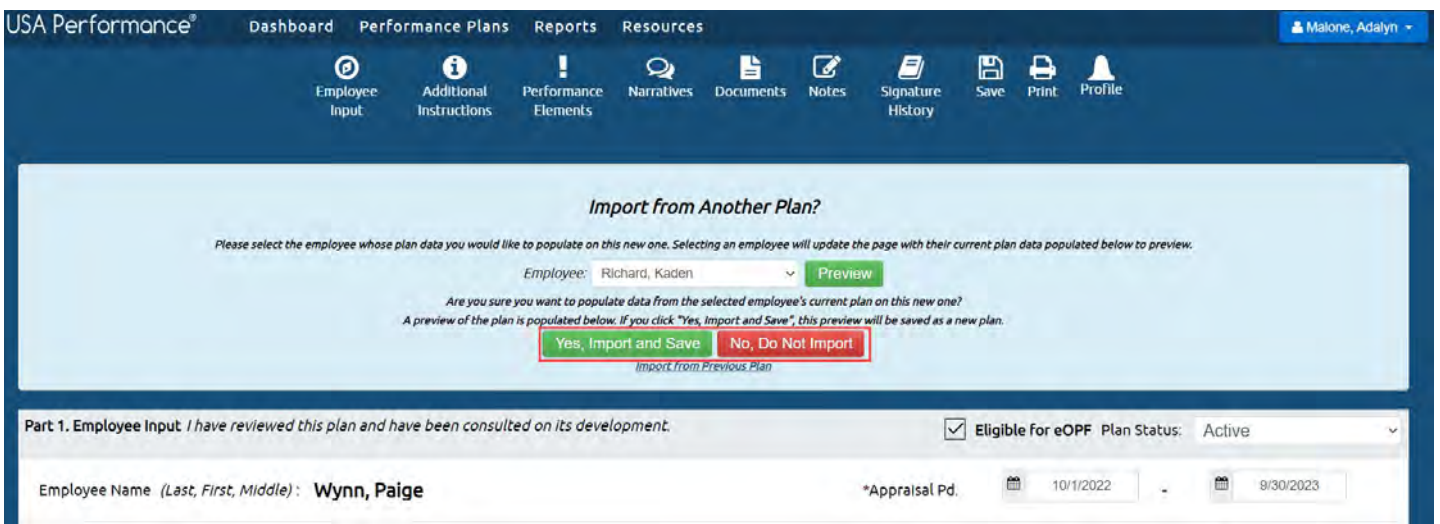
1. When the plan opens, the system will provide the option to import from another employee plan. Click **Import from Another Plan**.



2. The **Import from Another Plan** opens. Select the employee plan to import and click **Preview**.



3. A preview of the plan will appear. If the plan is accurate, click **Yes, Import and Save**. If not, click **No, Do Not Import**.



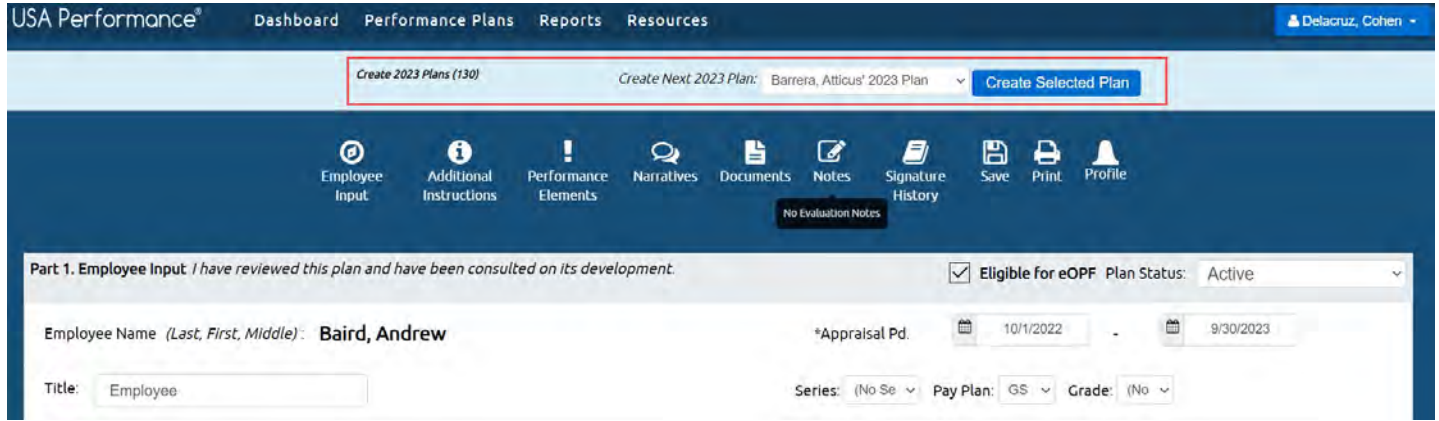
4. The performance plan will populate, importing the other plan information.

5. Review the plan, edit as applicable and click **Save**.

Rating Official Navigation

Officials may navigate between employees to create plans.

1. To navigate from one employee plan to the next, select the next employee plan to create from the drop down at the top of the navigation bar and click **Create Selected Plan**.

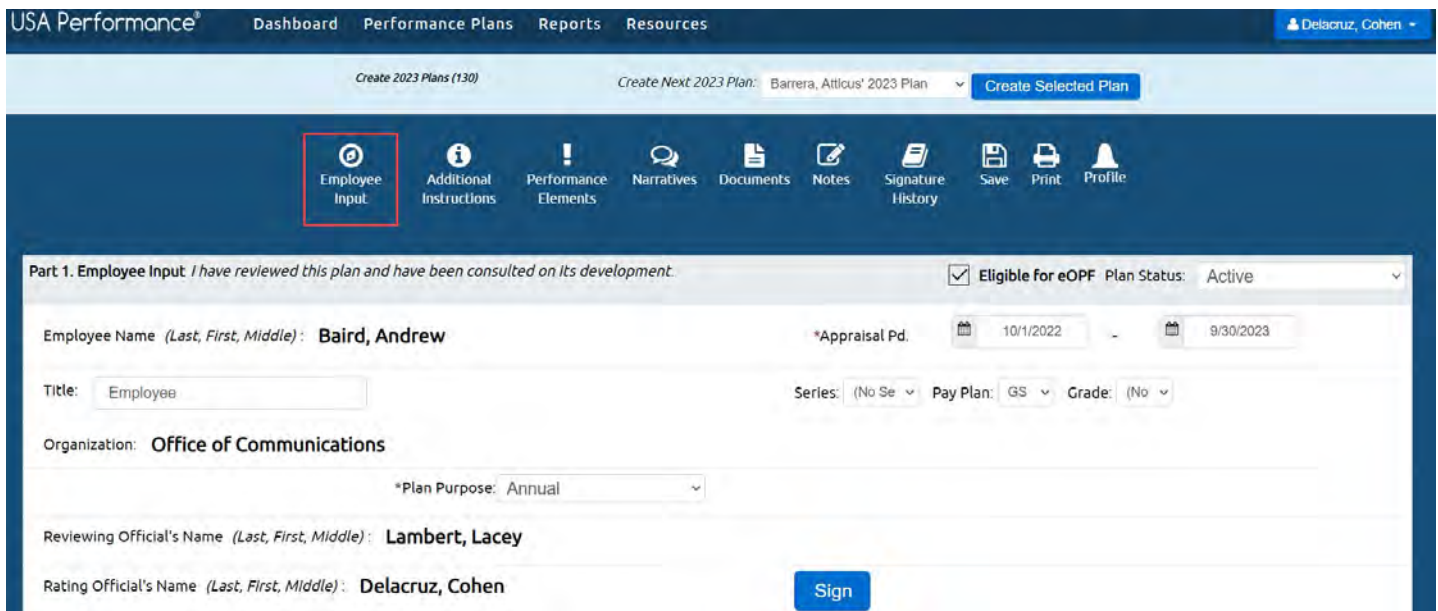


The screenshot shows the top navigation bar of the USA Performance system. The user is logged in as Delacruz, Cohen. The navigation bar includes links for Dashboard, Performance Plans, Reports, and Resources. A dropdown menu for 'Create Next 2023 Plan' is open, showing 'Barrera, Atticus' 2023 Plan'. The 'Create Selected Plan' button is highlighted with a red box. Below the navigation bar is a toolbar with icons for Employee Input, Additional Instructions, Performance Elements, Narratives, Documents, Notes, Signature History, Save, Print, and Profile. A 'No Evaluation Notes' button is also visible. The main content area shows 'Part 1. Employee Input' with a checkbox for 'Eligible for eOPF' and 'Plan Status: Active'. The employee name is 'Baird, Andrew', the title is 'Employee', and the appraisal period is from 10/1/2022 to 9/30/2023. Other fields include Series, Pay Plan, and Grade.

2. The selected performance plan will open with new importing options.
3. Review the plan, edit as applicable and click **Save**.

Employee Input and the Performance Elements

1. Review and update **Part 1. Employee Input** as needed. This information is populated from the user profile. Read only text can be updated by administrators only on the user profile page.



The screenshot shows the 'Employee Input' section of the USA Performance system. The user is logged in as Delacruz, Cohen. The navigation bar is the same as in the previous screenshot. The 'Employee Input' icon in the toolbar is highlighted with a red box. The main content area shows 'Part 1. Employee Input' with a checkbox for 'Eligible for eOPF' and 'Plan Status: Active'. The employee name is 'Baird, Andrew', the title is 'Employee', and the appraisal period is from 10/1/2022 to 9/30/2023. Other fields include Series, Pay Plan, Grade, Organization (Office of Communications), Plan Purpose (Annual), Reviewing Official's Name (Lambert, Lacey), and Rating Official's Name (Delacruz, Cohen). A 'Sign' button is visible at the bottom right.

2. Scroll to **Part 7. Performance Elements** or click **Performance Elements** on the navigation bar to review and edit any pre-populated elements.

USA Performance® Dashboard Performance Plans Reports Resources Delacruz, Cohen

Create 2023 Plans (130) Create Next 2023 Plan: Barrera, Atticus' 2023 Plan Create Selected Plan

Employee Input Additional Instructions **Performance Elements** Narratives Documents Notes Signature History Save Print Profile

one individual element requires that the summary rating be Level 1 (Unacceptable).

Part 7. Performance Elements Edit

Customer Support Critical Weight: 15%

Strategic Alignment:

1) Managed special projects that have a significant Impact on the delivery of customer support services

Fully Successful:
Fully Successful

Customer Support Rating Levels:

Unacceptable Marginally Successful Fully Successful Exceeds Fully Successful Outstanding

Edit Current Performance Elements

1. Click **Edit** in **Part 7. Performance Elements** to make changes.

USA Performance® Dashboard Performance Plans Reports Resources Delacruz, Cohen

Create 2023 Plans (130) Create Next 2023 Plan: Barrera, Atticus' 2023 Plan Create Selected Plan

Employee Input Additional Instructions **Performance Elements** Narratives Documents Notes Signature History Save Print Profile

one individual element requires that the summary rating be Level 1 (Unacceptable).

Part 7. Performance Elements Edit

2. Click **Edit** associated with any performance element to edit.

Performance Element Review

Minimum: 1
Maximum: 5

Evaluation Performance Elements Search:

Name	Search Name	Action
Critical Element 1	Critical Element 1 - DOI Non Supervisory	Edit
Critical Element 2	Critical Element 2 - DOI Non Supervisory	Edit Remove from Plan

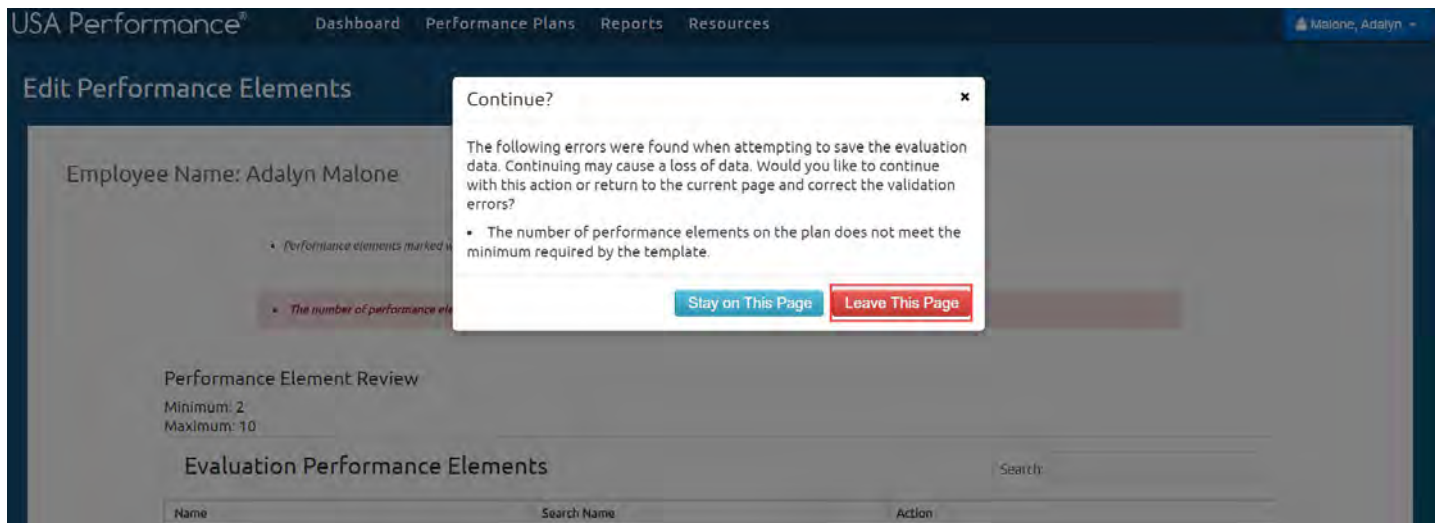
Records displayed 25

Showing 1 to 2 of 2 entries

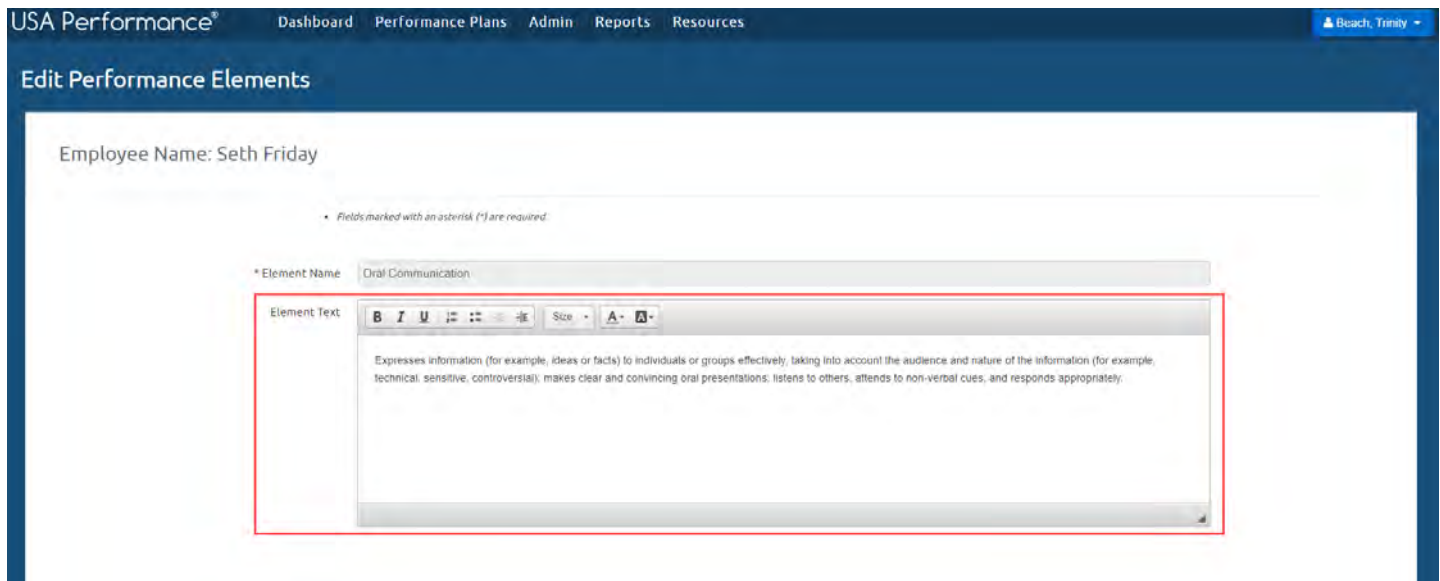
First Previous 1 2 Next Last

Add Performance Element

3. If you see an error notification, click **Leave This Page** and continue in the process.



4. The Edit Performance Elements page opens. If available, edit *Element Text* as needed.



5. If policy allows, you may select the element type as critical, non-critical or additional.
- DOI policy outlines that employees may have a minimum of one, but not more than five elements in their performance plans—all of which must be considered critical.

USA Performance® Dashboard Performance Plans Reports Resources Malone, Adalyn

Edit Performance Elements

Employee Name: Adalyn Malone

* Element Name: Work Accomplishment

Element Text: Executes and implements project plans and other assigned work. Additional information included here on how PE relates to Strategic Goal 6.

Select this element's type:

- Critical
Element rating affects the summary rating, and a Level 1 rating automatically results in a Level 1 summary rating.
- Non-Critical
Element rating affects the summary rating, but a Level 1 rating does not automatically result in a Level 1 summary rating.
- Additional
Element rating does not affect the summary rating. Select this option only if your agency's Performance Management policy allows.

6. Use the drop down to select one or more strategic goals. Click **Add Strategic Goals**.

Select the Performance Element's strategic goals from the following list. Clicking Save & Exit, Previous, or Next will commit the selected goals to the table below.

Strategic Goal:

- Select All
- STRATEGIC GOAL 1: Promote Well-Being, Equity, and Justice for Tribes, American Indians, Alaska Natives, Native I
- STRATEGIC OBJECTIVE 1.1: (Page 24 of Strategic Plan 2022-2026) Tribes and the U.S. Department of the Interior
- STRATEGIC OBJECTIVE 4.3: (Page 44) The U.S. Department of the Interior Workforce is Diverse, Safe, Engaged, an
- STRATEGIC GOAL 4: Serve and Honor the Public Trust

Save & Exit PREVIOUS NEXT

Action

Add Strategic Goals

7. Click **Next**.

8. Review, add or edit standard text as your agency policy allows. Repeat for each level.

The screenshot shows the 'Edit Performance Elements' page in the USA Performance system. The user is logged in as 'Beach, Trinity'. The page title is 'Edit Performance Elements' and the employee name is 'Seth Friday'. A note states: 'Fields marked with an asterisk (*) are required.' The main content is for 'Performance Element - Oral Communication' and 'Rating Levels and Standard Text'. It features a table with columns for 'Level', 'Level Name', and 'Points'. The first row is for 'Level 1' with 'Unacceptable' as the level name and '1' as the points. Below this row is a 'Standard Text' field with a rich text editor toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink, size, font color, background color) and a 'Required' checkbox.

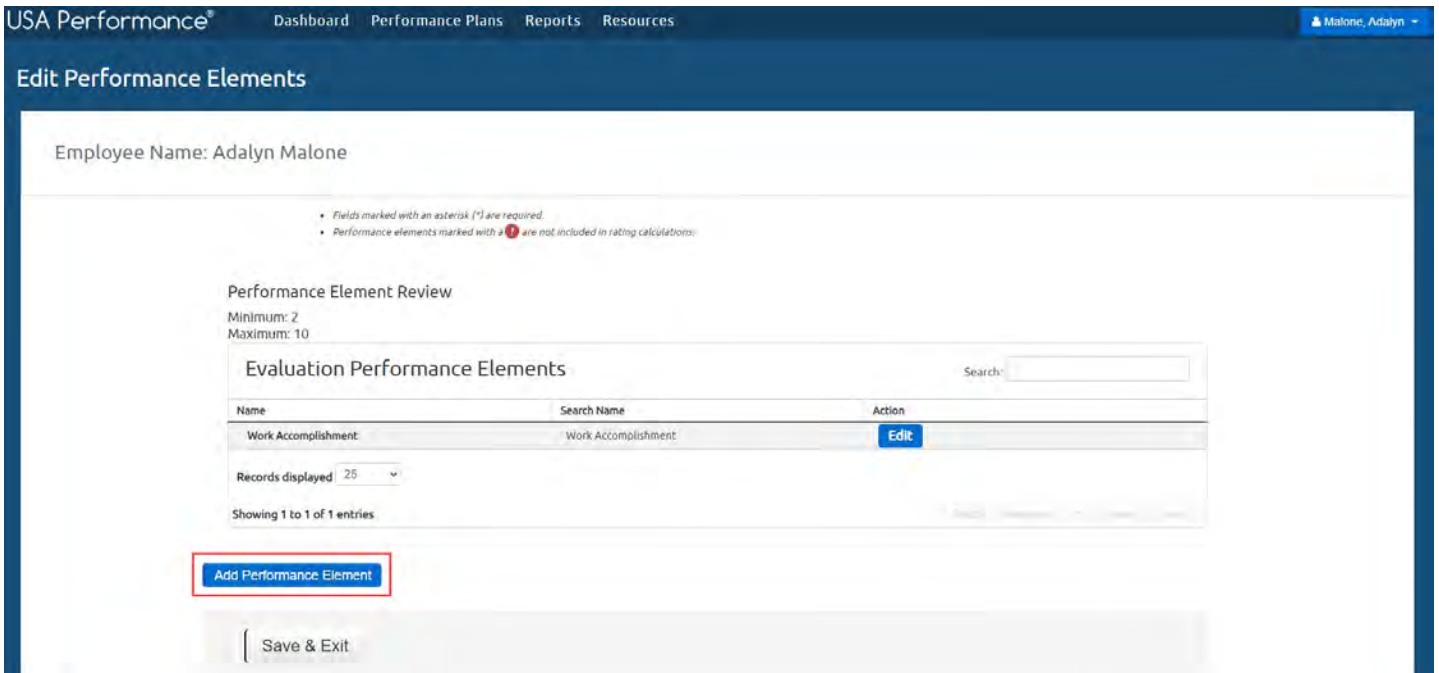
9. Click **Next**.

This screenshot shows the same 'Edit Performance Elements' page, but now for 'Level 5'. The 'Level Name' is 'Outstanding' and the 'Points' are '5'. The 'Standard Text' field contains the following text: 'changes in furthering the customer agency's mission/goals or meeting its stated needs. Demonstrates growth in position by accepting and successfully accomplishing new assignments requiring greater skill (e.g., technical advice and briefings to customers)'. The 'Required' checkbox is checked. At the bottom of the page, there are three buttons: 'Save & Exit', 'Previous', and 'Next'. The 'Next' button is highlighted with a red box.

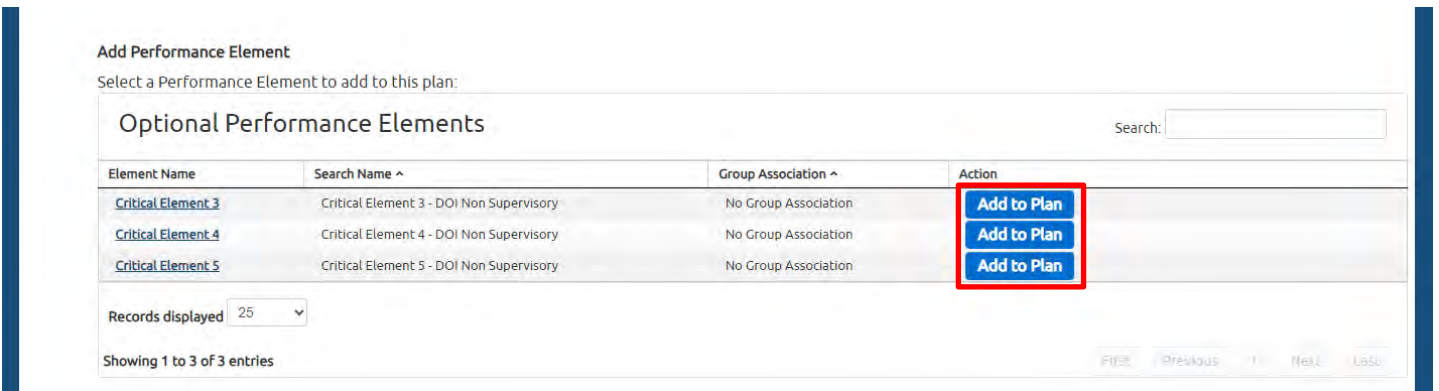
10. You will return to the **Edit Performance Elements** page and will repeat the process for additional element changes.

Add Additional Performance Elements

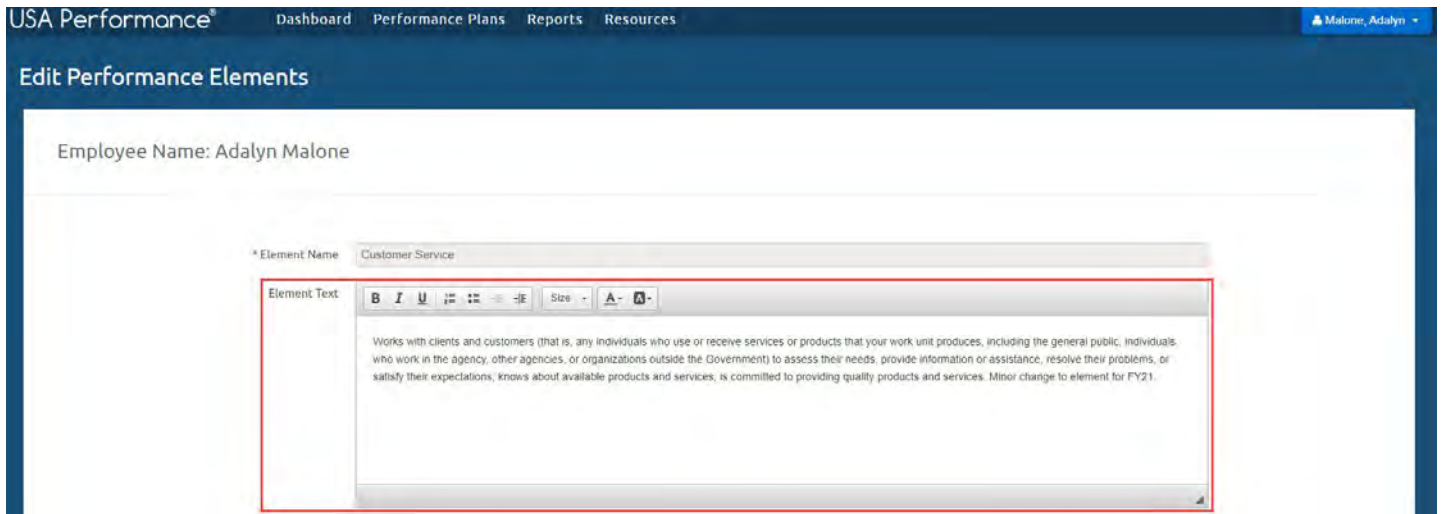
1. DOI policy outlines that employees may have a minimum of one, but not more than five elements in their performance plans. To add additional elements, click **Add Performance Element**.



2. Click **Add to Plan** associated with the performance element to add.



3. Edit *Element Text* as needed.



4. Review, add or edit standard text as your agency policy allows. Repeat for each level.
5. Click Next
6. You will return to the **Edit Performance Elements** page and will repeat the process for additional element changes.
7. If you need to remove an element previously added, click **Remove from Plan**. You will be asked to confirm your action. Click **Delete** to confirm.

Performance Element Review

Minimum: 1
Maximum: 5

Evaluation Performance Elements		Search:	
Name	Search Name	Action	
Critical Element 1	Critical Element 1 - DOI Non Supervisory	Edit	
Critical Element 2	Critical Element 2 - DOI Non Supervisory	Edit	Remove from Plan
Critical Element 3	Critical Element 3 - DOI Non Supervisory	Edit	Remove from Plan

Records displayed: 25

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

Complete Performance Elements

1. After all elements have been accurately developed in the plan, click **Save & Exit**.

Performance Element Review

Minimum: 1
Maximum: 5

Evaluation Performance Elements Search:

Name	Search Name	Action
Critical Element 1	Critical Element 1 - DOI Non Supervisory	Edit
Critical Element 2	Critical Element 2 - DOI Non Supervisory	Edit Remove from Plan
Critical Element 3	Critical Element 3 - DOI Non Supervisory	Edit Remove from Plan

Records displayed:

Showing 1 to 3 of 3 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

[Add Performance Element](#)

[Save & Exit](#)

2. You will return to the updated performance plan. Next you will complete the signature process. Please refer to the *Performance Plan Review and Signature Process guide* for either Rating Officials or employees.