



USA Performance[®]

Manage Performance, Ensure Success

Product Overview

presented by

Performance Management
HR Strategy and Evaluation Solutions
Human Resources Solutions
U.S. Office of Personnel Management

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I. OVERVIEW

USA Performance is the U.S. Office of Personnel Management's (OPM) software solution to assist Federal agencies in implementing their performance management programs and systems. USA Performance enables agencies to automate their performance appraisal process throughout the entire performance rating cycle. Agencies can develop performance plans, track and monitor employees' performance, provide feedback and ratings, and electronically sign off on performance plans as agency appraisal programs require. By streamlining the process, USA Performance allows agencies to focus on results and allows for performance management to happen in real time. USA Performance is a user-friendly, web-based application that includes customizable features. USA Performance is compliant with Federal performance management regulations and meets Federal Information Technology (IT) security requirements.

Federal agencies can purchase USA Performance through an Interagency Agreement under the provisions of the Revolving Fund, 5 U.S.C. §1304 (e) (1), which permits OPM to perform human resource management services for Federal agencies on a reimbursable basis. OPM renews USA Performance licenses on an annual basis; the renewal date is 12 months from the effective date on the interagency agreement. Account management services begin immediately after the Interagency Agreement is signed, and training for new users can begin shortly thereafter.

The annual USA Performance license fee is based on the number of licensed users in the organization. Each license grants access to all USA Performance features for executing Senior Executive Service (SES) and all other pay plans performance management business processes. Based on the user type, agencies can customize access to those features. Given the sensitive nature of the information housed in the system, access to sections of the system will be based on user roles determined by OPM and the agency.

USA Performance Features

USA Performance is designed by Federal performance management experts and maintained by OPM. USA Performance offers a core suite of functionalities that meet a variety of agency performance management processes while ensuring compliance with OPM recommended and required Federal regulations. USA Performance automates the new standardized SES Performance Management System process.

System Features

- ✓ Compliant with OPM and Federal Performance Management Regulations
- ✓ 508 Compliant
- ✓ Designed to specifics of the Government-wide SES Performance Management System

- Includes standard ECQs and ability to modify
- Prints approved SES Performance Plan Template
- ✓ Agency ability to configure plan and business processes
- ✓ Automatic rating calculations based on configured weights
- ✓ Secure, authenticated electronic signatures
- ✓ eOPF Interconnection
- ✓ Easy data transfer from agency payroll provider

User Features

- ✓ PIV enforced login with Login.gov as secondary multi-factor authentication
- ✓ Simple user interface:
 - Dashboard with tasks
 - One click to plan
 - Plan looks like paper plan, allowing for easier change management
- ✓ Build, store, and copy Federal performance appraisal plans and plan templates
- ✓ Build performance elements, standards, and competencies with weights and different ratings calculations
- ✓ Track notes on performance progress and self-accomplishments
- ✓ Build performance appraisal plans compliant with the new OPM SES PM System requirements
- ✓ Route ratings automatically to Performance Review Board (PRB), and other required agency-specific channels, for approval
- ✓ Make updates to goals and performance requirements at any time during performance cycle
- ✓ Document mid-year, quarterly, and/or other progress reviews
- ✓ Designate proxies for developing and managing performance plan
- ✓ HR Administrators can reassign users' roles with organizational and supervisory changes
- ✓ Ensure Goal Alignment
- ✓ Build performance element and strategic plan goal libraries

II. SCOPE OF SYSTEM SERVICES

USA Performance creates value for its users through both the software and comprehensive package of support services provided at no extra charge. USA Performance supports agencies by delivering:

1. Business Transformation Support
2. USA Performance User Support
3. Complete Hosting, Maintenance, and Security

The following sections describe each of the support services in greater detail.

1. Business Transformation Support

Account Management

USA Performance customers receive Account Management support from an OPM Account Manager who will manage the implementation process, coordinate user training, manage regular communication about USA Performance, and provide ongoing support throughout the partnership.

USA Performance Advisory Board Membership

Each customer agency has one representative on the USA Performance Advisory Board. The Advisory Board meets regularly to review the enhancement schedule, provide input on new features, and brainstorm creative solutions. The Advisory Board also receives previews of new interface designs and new functionality targeted for software upgrades. Members can also network with each other and share tips and ideas on how to best use USA Performance.

USA Performance System Enhancements and Platform Upgrades

USA Performance operates on a single platform. Because all customers use the same version of the system, everyone benefits from system enhancements. The main sources of system enhancements include:

- Changes in Federal Human Resources policy or law
- Changes in Federal IT Security requirements
- Advances in performance management as identified through benchmarking studies
- IT platform improvements
- USA Performance Advisory Board member recommendations
- User input received via the Account Managers and Help Desk

Implementation Set Up and Implementation Support

The account manager, with a team of OPM experts, oversees the entire implementation process. The USA Performance Program office provides a USA Performance Implementation Guide to help agencies

successfully transition their performance management processes to USA Performance. It provides recommendations, templates, and examples designed to help customers communicate the benefits of the system to stakeholders; develop and implement change management strategies; and optimize the use of the USA Performance system. The USA Performance Program office works with customers to help determine the best strategies for transitioning each organization to USA Performance.

2. USA Performance User Support

Unlimited Use of USA Performance

Agency users have unlimited access to USA Performance for developing performance plans, tracking and monitoring employees' performance, providing feedback and ratings, and electronically signing performance plans as agency appraisal programs require.

USA Performance Resource Page

The USA Performance has a resource page which includes various materials to support the training and ongoing use of USA Performance. The resource page contains online job aids and general information useful to both new and existing users. This resources page is updated regularly to include new information, such as system enhancements documentation.

System Training

USA Performance offers online training to help users have an understanding of the major system areas in planning, monitoring, and rating performance. Training includes system functionality for users and administrators designed to assist new users in optimally using USA Performance.

Help Desk Support

The USA Performance Help Desk provides technical support and guidance from experts of USA Performance. Help Desk staff responds during business hours through email or phone to provide solutions.

USA Performance Reporting Features

USA Performance data can be accessed in a variety of ways. The dashboard provides pertinent information on immediate tasks and employee status in the performance appraisal process. USA Performance provides standard reports on progress and status, and specialized reports for SES certification.

3. Complete Hosting, Maintenance, and Security

OPM hosts and maintains USA Performance. Customers have the benefit of OPM's dedicated IT security specialists and fully certified and accredited systems that meet relevant Federal security

standards. OPM adheres to Federal security controls in protecting USA Performance sensitive and personally identifiable information.

Database

The system, housed in OPM's Federal data center in Georgia, has primary and standby database servers for data redundancy. Each database server has a copy of the data and can operate independently. Each database server also utilizes mirrored hard disk drives for hardware redundancy and has redundant power supplies. The database backups are first stored to disk and then stored to tape, so at any given time there are two copies of the most recent backup. The USA Performance database is also replicated to a backup database located at the OPM disaster recovery site in Pennsylvania. Database information is transmitted daily via an OC3 circuit.

Network

There are web servers for redundancy and servers available to run background processing jobs. All servers have mirrored disk drives. Firewalls have mirrored disk drives and redundant power supplies. Redundant firewalls have been implemented for USA Performance. Redundant network switches are available on-site in our Georgia facility.

Connectivity

The facility hosting USA Performance has Internet Service capacity. There are multiple circuits and redundant routers configured to back up each other. OPM has used the same provider, Level 3 Communications, for over ten years.

Electric Power

The utility power source is Georgia Power, with dual active feeds that are monitored by a digital switch. Service is switched between them seamlessly upon a sag in voltage on the feed currently being used.

System Scalability

OPM designed USA Performance for high-volume usage. The system can increase usage capacity quickly in anticipation of each new customer.

System Security

USA Performance complies with the Federal Information Security Management Act (FISMA). FISMA protects the Government's information, operations, and assets, and provides security for the Government's investment in information technology. USA Performance undergoes regular National Institute of Standards and Technology (NIST) Special Publication (SP) 800-53 reviews of more than 150 security controls in three categories: Management, Operational, and Technical. A continuous risk

monitoring process is in place and evaluates risk as part of the system’s development life cycle. USA Performance’s most recent security assessment was completed in June 2017.

III. SYSTEM REQUIREMENTS

The Director of the Office of Personnel Management tasked the Human Resources Line of Business (HRLOB) with creating a Strategic Framework to enable the development of a single, integrated Government-wide human resources information technology (HRIT) environment over the next 10 years. One of the strategies outlined in the Framework is to develop minimum service requirements to expand Shared Service Providers’ (SSP) offerings to cover the full federal employee lifecycle from “Strategy to Separation,” enabling a common user experience. In October 2016, HRLOB issued the Employee Performance Management: Functional Framework Overview which includes Employee Performance Management Service Requirement (baseline set of technology-agnostic business needs, business rules, and/or service delivery capabilities that construct the service and enable its outcomes). To help agencies understand how USA Performance meets the standard requirements, USA Performance’s system requirements are compared to the standard list of HRLOB Performance Management Service Requirements.

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R1	Define a timeline for establishing, approving, and signing performance plans.	Meets
A4.R2	Establish a minimum Appraisal Period.	Meets
A4.R3	Establish a mechanism to create, modify, or view performance plans at any time throughout the performance cycle.	Meets
A4.R4	Support the development of employee performance plans in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R5	Provide guidance and assistance to rating officials during the performance management process in accordance with applicable laws, regulations and policies.	Meets
A4.R6	Provide the ability to create standardized or employee specific performance elements, standards and/or expectations.	Meets
A4.R7	Provide the ability to define strategic organizational goal alignment with individual elements and standards.	Meets
A4.R8	Provide the ability to establish a minimum and maximum number of performance elements.	Meets

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R9	Provide the ability to include performance elements that are critical, noncritical, and/or additional elements in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R10	Provide ability to establish performance elements and standards to be incorporated into the summary rating calculation (weighted and/or unweighted).	Meets
A4.R11	Provide the ability to establish the methodology (consistent with applicable laws, rules, regulations, policies and guidelines) that will be used to derive a rating of record.	Meets
A4.R12	Provide the ability to update employee's title, organization, series, grade and goals on a Performance Plan.	Meets
A4.R13	Provide the ability for Rating Officials and employees to acknowledge issue and receipt of all performance documents when creating a new plan.	Meets
A4.R14	Provide the ability to enable multiple approval processes (Emp/Supv, Emp/Supv/2nd Level Supv and Supv only) for the performance plan.	Meets
A4.R15	Provide the ability to change the rating official.	Meets
A4.R16	Evaluate performance appraisal systems and programs in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R17	Ensure the Employee is provided with information about the Performance Plan review process.	Meets
A4.R18	Provide the ability to link position description to performance plan.	Meets
A4.R19	Provide the ability to access a library of established performance elements other than elements focused on specific results.	Meets
A4.R20	Provide the ability to align competencies with performance management.	Meets
A4.R21	Provide the ability to align individual development plans (IDP) with annual performance plans.	Meets
A4.R22	Provide the ability for rating official to assign and rate technical and non-technical competencies.	Meets
A4.R23	Provide the ability to support the application for certification of the senior professional (SL/ST) appraisal system(s) in accordance with applicable laws, rules, regulations, policies and guidelines.	Enhancements for the standardized SL/ST planned

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R24	Provide the ability for the rating/reviewing official and HR Practitioner to view cycle progress by organization, office and employee in accordance with applicable laws, rules, policies and guidelines.	Meets
A4.R25	Provide the ability to provide measurable, quantifiable and timely data elements to report progress on performance objectives.	Meets
A4.R26	Ensure that changes to the performance plan are documented and communicated to the employee.	Meets
A4.R27	Establish a mechanism for employee acknowledgement of changes or modifications to established performance plans.	Meets
A4.R28	Provide the ability for Rating Official to view Accomplishments submitted by the employee throughout the appraisal period.	Meets
A4.R29	Establish the mechanism to capture, document and communicate employee unacceptable (e.g., less than Fully Successful) performance in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R30	Provide the ability for Rating Officials and employees to acknowledge issue and receipt of performance documents during progress reviews.	Meets
A4.R31	Provide the ability to support one or more progress reviews during an appraisal cycle in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R32	Provide supporting documents to justify withholding or denying, or granting afterwards, a Within Grade Increase, in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R33	Provide the ability to submit documents supporting personnel actions informed by performance, excluding WGIs and QSIs.	Meets
A4.R34	Provide the ability for the Rating Official to view the submitted Self-Assessment throughout the appraisal period.	Meets
A4.R35	Provide the ability for employee to request feedback any time during the performance appraisal period.	Meets
A4.R36	Provide the ability to track supervisor's Coaching or Mentoring Tasks / Reminders / To Dos, to support engagement with staff and accountability for engaging employees.	Meets

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R37	Provide the ability for managers and employees to provide, track and maintain feedback, and/or accomplishments during Progress Reviews.	Meets
A4.R38	Provide the ability to enable multiple approval processes (Emp/Supv, Emp/Supv/2nd Level Supv and Supv only) for summary rating.	Meets
A4.R39	Ensure rating of record is based only on the evaluation of actual job performance against the established elements, standards and/or expectations for the designated appraisal period.	Meets
A4.R40	Provide the ability to measure performance against identified elements, standards and/or expectations.	Meets
A4.R41	Provide the ability to not rate an element.	Meets
A4.R42	Provide the ability to support the administration of Centralized Review Panel for Senior-Level (SL) and Scientific or Professional (ST) in accordance with applicable laws, rules, regulations, policies and guidelines.	Enhancements for the standardized SL/ST planned
A4.R43	Establish mechanism for Rating or Reviewing Official and/or designees to provide written narrative(s) to support individual element ratings and/or summary rating.	Meets
A4.R44	Provide the ability to capture employee and Rating and Reviewing Officials feedback on a performance appraisal.	Meets
A4.R45	Provide the ability for a rating official and/or designee to complete and submit a performance review, against the established elements, standards and/or expectations.	Meets
A4.R46	Provide the ability for Rating Officials and employees to acknowledge issue and receipt of performance documents during performance appraisal.	Meets
A4.R47	Provide the ability for the Rating Official to confirm that he/she conducted an appraisal discussion with the employee and issued a final rating of record.	Meets
A4.R48	Ensure that the performance appraisal is documented, signed by the rating official and communicated to the employee.	Meets
A4.R49	Establish a mechanism to monitor the completion of performance plans, performance reviews and performance appraisals.	Meets
A4.R50	Establish a formal and informal process for reconsideration of the rating of record.	Meets

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R51	Provide the ability to access, retain and purge current and prior year(s) employee performance records in accordance with applicable laws, rules, regulations, policies and guidelines (e.g., ratings).	Meets
A4.R52	Provide the ability to remove performance appraisals for plans that are null and void.	Meets
A4.R53	Establish a mechanism to provide off-cycle progress reviews to support personnel decisions such as WGI approval/disapproval or adverse performance-based actions associated with unacceptable performance.	Meets
A4.R54	Provide capability for managers to view employee comments while completing appraisal.	Meets
A4.R55	Provide the ability for the employee to submit a Self-Assessment for consideration during performance reviews.	Meets
A4.R56	Establish a mechanism to capture previous rating official feedback.	Meets
A4.R57	Establish criteria for performance awards.	Does not meet; Enhancements planned
A4.R58	Provide the ability to use performance ratings to determine performance award and pay eligibility.	Meets
A4.R59	Provide the ability to support the administration of monetary and non-monetary awards.	Does not meet; Enhancements planned
A4.R60	Provide the ability to report on awards (monetary and non-monetary) and ratings to make data driven decisions and to evaluate the efficiency and effectiveness of performance and award programs.	Does not meet; Enhancements planned
A4.R61	Provide the ability to submit supporting documentation to recommend a Quality Step Increase, in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R62	Provide the ability to monitor and report monetary awards given to employees to ensure compliance with OPM guidelines.	Does not meet; Enhancements planned
A4.R63	Provide the ability for managers, HR practitioners, and/or designees to access employee's monetary and non-monetary award history.	Does not meet; Enhancements planned

UID	HRLOB Performance Management Service Requirements	USA Performance System
A4.R64	Provide the ability to create, track, maintain and access records related to performance management system(s) and program(s) in accordance with applicable laws, rules, regulations, policies and guidelines.	Meets
A4.R65	Establish a mechanism to formally record the rating of record.	Meets
A4.R66	Support the submission of performance appraisal systems and programs documentation to OPM.	Meets
A4.R67	Ensure rating and reviewing officials and HR practitioners are able to pull reports throughout the various rating cycle(s), including the rating of record.	Meets
A4.R68	Establish the mechanism to provide consistent and transparent government-wide reporting of EPM system performance data.	Meets*
A4.R69	Provide data support for senior professional (SL/ST) performance management appraisal system(s) certification in accordance with applicable laws, rules, regulations, policies and guidelines.	Enhancements for the standardized SL/ST planned
A4.R70	Identify and record employees who were not rated and why a rating was not given.	Meets
A4.R71	Establish the mechanism to report performance management activities to EHRI.	Meets
A4.R72	Provide the ability for managers and HR practitioners to select competencies from a competency library.	Meets

*Can provide data on agencies who use the system.

Beyond the HRLOB requirements, USA Performance has other system requirements identified specifically for USA Performance by its cross-government working group and user base.

#	USAP System Requirement	System Component
1	Allow users access to their own "Completed" performance plans for the previous 4 (GS) or 5 (SES) Rating cycles, in compliance with OPM policy and agency filing requirements.	Overall System
2	Support the government-wide, standardized Senior Executive Service (SES) performance appraisal process and standardized performance plan.	SES

#	USAP System Requirement	System Component
3	Provide data support for SES performance management appraisal system(s) certification in accordance with applicable laws, rules, regulations, policies and guidelines.	SES
4	Provide the ability to support the administration of Performance Review Board for SES in accordance with applicable laws, rules, regulations, policies and guidelines.	SES
5	Provide the ability to support the application for certification of the SES appraisal system(s) in accordance with applicable laws, rules, regulations, policies and guidelines.	SES
6	Allow agencies to have multiple progress reviews	Overall System
7	Ensure Agency Administrators and Rating Officials can pull standard and custom reports on performance management information in the system.	Reports
8	Send individual completed employee performance appraisal plans to their electronic personnel folder (eOPF).	Reports
9	Provide PIV Enabled log-in.	Overall System
10	Provide the ability to manage proxy users.	Overall System
11	Provide Helpdesk and <i>Footprints</i> ticketing.	Overall System
12	Allow users to add employee level and system-wide documents as additional resources.	Overall System
13	Enable printing of all performance appraisal plans and notes.	Overall System
14	Enable data exchanges with EHRI and/or other personnel systems.	Overall System
15	Allow for email notifications from actions taken in the system.	Overall System
16	Display an audit trail of changes made to a performance appraisal plan.	Enhancements planned
17	Allow for multiple performance appraisal plans in a single rating cycle.	Meets
18	Enable Agency Administrators to set deadlines and due dates from a master calendar.	Planned for future development
19	Support the government-wide, standardized senior professional (SL/ST) performance appraisal process and standardized performance plan.	Planned for future development

Primary USA Performance User Roles

User Role	Description
Administrator	This role has the highest access rights to USA Performance. At the top hierarchical level these users may control agency groups, can alter templates, provide notifications, access users' account information, etc. The top Administrators may also dictate the permissions and functionality available for lower level administrators or those requiring specific limited access. This role performs the administrative aspects of the performance management cycle. In general, Administrators have all of the rights of end users except they cannot sign and approve documents. They may act as proxies for others users including the PRB Chair and Appointing authority. They also have the role of an end user for completing their own performance appraisal process.
End User (Executive)	These users create their own plans, edit plans, sign their own plan at each stage of the performance management cycle and add attachments to their performance plan.
End User (Employee)	These users can sign their own plan at each stage of the performance management cycle, provide self-accomplishment narratives and add supplemental documents to their performance plan.
End User (Rating Official)	These users create draft performance plans for their subordinate employees, sign plans, provide feedback in progress reviews, write narrative feedback on performance and rate their employees. These users also have the Employee or Executive functions.
End User (Reviewing Official)	These users ensure the Rating Official and Executive have completed each phase of the performance management process according to regulations, policy, etc. They can sign or reject plans. They can also act as a Higher Level Reviewer for executives that are not under their purview (SES ONLY). These users also have the Employee or Executive functions.
Basic User (PRB Member)	These users have the ability to view Executive performance plans along with the initial ratings. The agency establishes one or more PRBs consisting of three or more Executive members to make written recommendations to the Appointing Authority on annual summary ratings of senior executive performance. Each PRB must have 3 or more members selected by the agency head or designee(s) in a manner that ensures consistency, stability and objectivity in SES

	performance appraisal in accordance with 5 CFR 430.310. These users also have the Employee or Executive functions.
Basic User (PRB Chair)	This user has the ability to view Executive performance plans along with the initial ratings. They can input their ratings into the system and sign off on the ratings for the PRB. This user also has the Employee or Executive functions.
Basic User (Appointing Authority)	This user is an agency head or designee with the authority to finalize performance ratings for Senior Executives under the SES Performance Management System. This user also has the Employee or Executive functions.
Performance Appraisal Certifier	This user acts as a third review beyond a rating official and reviewing official. The user will have the ability to certify or bypass plans in the rating phase.

IV. ADDITIONAL SERVICES

1. Performance Management Consulting

The benefits of USA Performance are magnified for agencies that have an effective performance management program. This includes policy that is compliant with federal requirements and embraces best practices, performance plans that are tailored to the employees' positions with a focus on measurable results, and supervisors who understand how to effectively manage their employees' performance. The following outlines consulting services an agency may adopt to help augment the implementation of USA Performance.

2. Pre-Implementation Services

Performance Management Program Development or Evaluation

An agency will experience the most benefits from automating their performance management processes when the agency's performance management program/policy is reflective of federal requirements and include current best practices. To meet this need, a thorough review or revamp of an agency's performance management program may be appropriate. OPM consultants can design a performance appraisal program which meets all requirements, includes procedures, forms, and cycles that comply with laws and regulations, and performance-based job elements that are linked to an agency's strategic plan. If the development of a new program/policy is not required, consultants can conduct a review of the current program/policy and performance plans to provide recommendations on how to better comply with OPM's requirements and incorporate current performance management best practices.

- The Performance Management Program Development deliverable includes:
 - A review of the current performance management program and performance plans with recommendations for improvement;
 - A briefing with stakeholders on the program and plan review;
 - A revised performance management program that includes stakeholder input; and
 - A revised employee and supervisory plan template.
- The Performance Management Program Evaluation deliverable includes:
 - A review of the current performance management program and performance plans with recommendations for improvement; and
 - A briefing with stakeholders on the program and plan review.

Performance Plan Development

An agency will experience the biggest benefits of automating the performance management processes if performance plans are effectively developed. OPM consultants can develop performance plans to include development of elements linked to agency performance measures, and standards for the performance plans that align with an agency's strategic plan, organizational performance measures, and meet OPM requirements. Consultants can work with agencies to develop measures for performance appraisal standards by program area or job series. These revised and updated performance plans can then be entered in USA Performance. Initial cost estimates include developing 10 plan templates, each covering two grade levels and performance standards developed at the fully successful level.

OPM consultants can also help SES or SL/ST employees draft performance requirements that are results-oriented and measurable, either onsite with individual coaching, or virtually with a review and rewrite of the performance requirement/standard.

3. Parallel-Implementation Services

Performance Management How-To-Guide

At the start of an appraisal period, employees and supervisors should have a clear understanding of their performance management program and best practices to implement when management employee performance. OPM consultants can create a performance management how-to guide to break down the phases of performance management that provide reminders of the various performance management requirements, tips for best practices, and reminders of how to implement these best practices using USA Performance. OPM consultants work with the agency to customize the guide. The guide is easily navigable and can be catered to any audience.

Training: Creating Results-Oriented Performance Plans

An agency will experience the biggest benefits of automating the performance management processes if performance plans are effectively developed. OPM can design and deliver a training session to Senior Executives, supervisors, or agency HR specialists on writing performance standards that are results-focused and measurable. The training content and examples will be tailored to the agency. Content will include how to meet OPM's Federal performance plan requirements and the steps to follow when writing a measurable performance standard with a focus on quality measures. Content will also include an exercise where participants write a performance standard they can later incorporate into an employee's performance plan.

Training: Effective Performance Discussions

Automating your performance management program does not mean communication can stop. With or without automation, supervisors must provide frequent performance feedback to employees so both parties are aware of expectations and how the employee is performing in comparison to those expectations. This course provides an overview of conducting effective performance discussions with employees. Additional course material can be included that focuses on holding career development discussions with the employee. The course material helps supervisors and agency HR specialists become better informed on how to conduct these discussions. The course includes hands on examples of effective discussion tactics, how to structure any type of performance discussion to include difficult conversations, and a role-playing exercise that allows participants to practice the material they learn.

Training: Employee Engagement

Automating your performance management program could lead to increasing employee engagement, however, leadership must play a critical role in engaging employees outside of the performance plan. This course provides resources for Senior Executives and supervisors to increase employee engagement in their organization. This training includes concepts and management techniques designed to promote behavioral change in any organization and provides tools that leadership need to drive engagement. This training focuses on four core areas that statistically drive employee engagement in today's modern workforce. The core areas covered in this course are leadership, change management, performance management, and recognition. Specifically, leaders will learn techniques to inspire their employees to improve performance and maintain their performance in changing environments. Leaders will also learn how to provide quality performance feedback. Finally, the training offers proven methods to recognize federal employees in a meaningful way.

V. STANDARD TERMS

Term	Definition
Additional Performance Element	A dimension or aspect of performance that is not a critical or non-critical element, and not used in assigning a summary level but still useful for purposes such as communicating performance expectations and serving as the basis for granting awards. Such elements may include, but are not limited to, objectives, goals, program plans, work plans and other means of expressing performance.
Appraisal	The process under which performance is reviewed and evaluated.
Appraisal Period	The established period for which performance will be reviewed and a rating of record will be prepared.
Appraisal Program	The specific procedures and requirements established under the policies and parameters of an agency appraisal system.

Term	Definition
Appraisal System	A framework of policies and parameters established by an agency as defined at 5 U.S.C. 4301(1) for the administration of performance appraisal programs, under subchapter I of chapter 43 of title 5, United States Code, and subpart B of 5 CFR 430. (Also referred to as the Performance Appraisal System)
Award	Recognition and/or reward of individual or team achievement that contributes to meeting organizational goals or improving the efficiency, effectiveness and economy of the Government or is otherwise in the public interest.
Award Program	The specific procedures and requirements established by an agency or a component of an agency for granting awards under subchapter I of chapter 43 and subchapter I of chapter 45 of title 5, United States Code, and subpart A of 5 CFR 451.
Critical Element	A work assignment or responsibility of such importance that unacceptable performance on the element would result in a determination that an employee's overall performance is unacceptable. Only to be used for performance measurement at the individual level.
Non-Critical Element	A dimension or aspect of performance, exclusive of a critical element, used in assigning a summary level. Such elements may include, but are not limited to, objectives, goals, program plans, work plans and other means of expressing expected performance.
Performance	Accomplishment of work assignments or responsibilities.
Performance Appraisal System	See Appraisal system.
Performance Plan	All of the written, or otherwise recorded, performance elements that set forth expected performance. Includes all critical and non-critical elements and their performance standards.
Performance Rating	The written, or otherwise recorded, appraisal of performance compared to the performance standard(s) for each critical and non-critical element on which there has been an opportunity to perform for the minimum period. A performance rating may include the assignment of a summary level within a pattern (as specified in 5 CFR 430.208(d)).
Performance Standard	The management-approved expression of the performance threshold(s), requirement(s), or expectation(s) that must be met for an employee to be appraised at a particular level of performance. A performance standard may include, but is not limited to, quality, quantity, timeliness and manner of performance.

Term	Definition
Progress Review	Communication(s) with the employee, which compares actual performance to the established standards of critical and non-critical elements.
Rating of Record	The performance rating prepared (1) at the end of an appraisal period for performance of agency-assigned duties over the entire period and the assignment of a summary level within a pattern (as specified in 5 CFR 430.208(d)), or (2) in accordance with 5 CFR 531.404(a)(1).
Rating Official	The agency-designated individual who assesses employee performance during the appraisal period and provides a rating of record at the conclusion of the appraisal period, as established in the appraisal program (usually the first-line supervisor).
Reviewing Official	The agency-designated individual who provides a higher-level review of performance plans and ratings, as established in the appraisal program.
HR Specialist	The agency-designated individual who is responsible for a specific type of human resources work in an organization related to employee performance management.