

United States Department of Defense (DoD)
Acquisition Workforce Demonstration Project (AcqDemo)
Contribution-based Compensation and Appraisal System Software
(CAS2Net)



Subcontract: 0262-14-007

CAS2NET USER GUIDE (CUG)

Version 15.0

December 30, 2015

Document Control Number: HQ0034-14-A-0005-006.4.1

Prepared for:

United States Department of Defense (DoD)
Acquisition Workforce Demonstration Project (AcqDemo)



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Document Change History

The table below identifies changes that have been incorporated into each version.

Date	Version #	Change Description
10/1/2001	1.0	Initial Draft
9/30/2011	11.0	Brought up-to-date for 2011 Enhancements and reformatted document by user role.
9/30/2012	12.0	Add 2012 assessment enhancements including CAS2Net “new look and feel”.
10/6/2012	12.1	Add 2012 administrative enhancements
9/26/2013	13.0	Add Closeout Assessments and 2013 feature enhancements.
12/30/2015	15.0	Add CAS2Net Document Repository and 2015 feature enhancements.

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1. INTRODUCTION

This document describes the features and capabilities of the Contribution-based Compensation and Appraisal System Software (CAS2NET) for the Acquisition Workforce Demonstration Project (AcqDemo) Office of the United States Department of Defense (DOD).

1.1 Purpose

CAS2NET is an online reporting system of the Contribution-based Compensation and Appraisal System (CCAS), a results-based, competency-linked pay banding and performance-based pay system. The purpose of this document is to describe the features and capabilities of the CAS2NET and to define the role of CAS2NET in supporting the Acquisition Workforce Demonstration Project (AcqDemo).

1.2 Scope

CAS2NET supports planning, feedback, assessment and reward activities of the performance cycle. The Contribution Planning module encourages collaboration between employees and supervisors to refine performance objectives. Additional Feedback and Mid-Point Review modules promote continuous communication and performance improvement. Closeout Assessments review employee performance for partial year position assignments. The Annual Appraisal modules enable employees and supervisors to provide evaluations based on their respective viewpoints. The reward activities consist of the Pay Pool Panel review and reconciliation of the Level 1 Supervisors’ evaluations and the generation of the employee salary increase, award and bonus. After appraisals and payouts are final, employees and supervisors digitally sign the Annual Appraisal report documents and upload them to the CAS2Net Document Repository.

The scope of this document includes the guidance for using the CAS2NET to record and review performance appraisals individually or collectively across different supervisory levels—and to assist Pay Pool Administrators in their roles as CAS2Net data administrators.

1.3 Document Overview

This guide helps you get started with the CAS2NET and serves as a reference whenever you need assistance with a particular function. This guide includes a section for each CAS2NET user role providing guidance on how to use the system to execute their assigned responsibility in the performance appraisal workflow and/or Pay Pool administration. This document contains the sections and appendices described in Table 1-1.

Table 1-1: CAS2NET User Guide Contents

Section/ Sub- Section	Name	Contents
1.0	Introduction	This section describes the purpose and scope of this document, and provides an overview of document content.
2.0	CAS2Net Overview	This section provides an overview of the Contribution-based Compensation and Appraisal System Software, CAS2NET User Roles and their responsibilities, who should use this guide, access, transfer, sharing, and ownership of appraisal records, and the different conventions that will be seen throughout the document.

Section/ Sub- Section	Name	Contents
3.0	CAS2Net User Session	This section describes how the system users will access the system and what they will see upon successful log-in based on their assigned role(s).
4.0	Employee	This section describes the role of an AcqDemo employee and available CAS2Net functionality.
5.0	Level 1 Supervisor	This section focuses on the Level 1 Supervisor's use of the system and details how to use CAS2NET to enter and edit performance factors and appraisals. CAS2NET supports the Level 1 Supervisor's ability to create and modify performance factors for each employee they supervise.
6.0	Level 2 Supervisor	This section provides guidance for the Level 2 Supervisor on how to use CAS2NET to perform rating and reviewing functions described in section 5.0.
7.0	Sub-Panel Manager	This section provides guidance for the Sub-Panel Manager on how to use CAS2NET to review ratings and facilitate Sub-Panel Meetings.
8.0	Pay Pool Manager	This section provides guidance for the Pay Pool Manager on how to use CAS2NET to monitor the progress of appraisals across the Pay Pool and review the rating of a selected employee for completeness. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
9.0	Pay Pool Administrator	This section provides guidance for the Pay Pool Administrator on how to use CAS2NET to download data to CWB, upload data from CWB, make supervisory assignments for employees, the review of the performance ratings of employees for fair consideration.
10.0	Superuser, Full Access User	This section provides guidance for the Superuser (or Full Access User) to perform the data administration functions described in section 9.0. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
11.0	CAS2Net Reports	This section overviews the reports available to CAS2Net users.
12.0	CAS2Net Document Repository (eDocuments)	This section overviews the CAS2Net Document Repository where digitally signed Annual Appraisals are maintained. It includes descriptions of the content and usage for employees, supervisors and managers.

1.4 CAS2NET Overview

CAS2NET is an online reporting system of the Contribution-based Compensation and Appraisal System (CCAS), a results-based, competency-linked pay banding and performance-based pay system. CAS2NET represents evolution of tools for the Acquisition Workforce Demonstration Project (AcqDemo) Office of the United States Department of Defense (DOD), to augment the performance appraisal management process. CAS2NET supports planning, feedback, assessment and reward activities of the performance cycle, while the Contribution Planning module encourages collaboration between employees and supervisors to refine performance objectives. Additional Feedback and Mid-Point Review modules will promote continuous communication and performance improvement, as Closeout Assessments and the Annual Appraisal modules enable employees and supervisors to provide evaluations based on their respective viewpoints. The reward activities consist of the Pay Pool Panel review and reconciliation of the Level 1 Supervisors’ evaluations and the generation of the employee salary increase, award and bonus.

2. CAS2NET OVERVIEW

This section provides an overview of CAS2NET, user roles, and their responsibilities.

2.1 Who Should Use This Guide?

The CAS2NET User Guide is for Employees, Level 1 Supervisors, Level 2 Supervisors, Sub-Panel Managers, Pay Pool Managers, and the Pay Pool Administrator who are assigned these roles in the CAS2NET to perform their respective responsibilities listed in Table 2-1.

Table 2-1: CAS2NET User Roles and Responsibilities

CAS2NET User Role	Responsibilities
Employee	An individual who participates in the AcqDemo pay pool processes as a “demo” employee. Responsible for: <ul style="list-style-type: none"> ▪ Collaborating with the Level 1 Supervisor to set performance standards. ▪ Providing self-assessments for Mid-Year Review and Annual Appraisal.
Level 1 Supervisor	An AcqDemo employee who is the immediate supervisor of one or more “demo” employees. Responsible for: <ul style="list-style-type: none"> ▪ Setting performance standards, and communicating performance expectations. ▪ Monitoring and providing performance feedback. ▪ Appraising performance. ▪ Taking action to recognize, reward, or correct performance.
Level 2 Supervisor	A higher level AcqDemo official who reviews the Level 1 Supervisor’s determination of an employee’s performance. Responsible for: <ul style="list-style-type: none"> ▪ Reviewing employee ratings to ensure that the same standards for evaluating performance are applied by reporting supervisors.
Sub Panel Manager	The next higher official in the pay pool responsible for: <ul style="list-style-type: none"> ▪ Convening and oversight of the Sub-Panel Meeting. ▪ Enforcing pay pool procedures and policies.

CAS2NET User Role	Responsibilities
Pay Pool Manager	The highest ranking official in the pay pool responsible for: <ul style="list-style-type: none"> ▪ Managing the performance pay increases based on share distribution, and performance awards for their respective pay pool. ▪ Convening and oversight of the Pay Pool Panel. ▪ Ensuring judicious use of pay pool funds balanced against budget policies and based on employee performance. ▪ Enforcing pay pool procedures and policies; and ensuring that Level 1 Supervisors comply with timely issuance of mid-term reviews and closeout assessments.
Pay Pool Administrator	The Pay Pool Administrator is responsible for: <ul style="list-style-type: none"> ▪ Tracking the progress of the performance evaluations across pay pools. ▪ Analyze performance management data across pay pools. ▪ Create and modify employee record in CAS2NET.
Superuser	The Superuser is responsible for: <ul style="list-style-type: none"> ▪ Overseeing the entire CAS2Net system to ensure supervisor assignments are correct ▪ Assist employees and supervisors with problems or issues concerning their CAS2Net role. ▪ Create and modify employee record in CAS2NET.

2.2 Access and Authorization

User access to CAS2NET is authenticated by DOD’s e-Authentication system upon log-in. Authorization to access CAS2NET functions is determined by the assigned user role (s) of the CAS2NET user. The navigation bar on the left side of the screen is customized based on assigned role (s) to an individual CAS2NET user. Thus a CAS2NET user who is an Employee and a Level 1 Supervisor will see the menus available to both assigned roles.

2.3 Ownership of Performance Appraisal and Review Workflow

Each employee is assigned to a pay pool in the CAS2NET, and has assigned officials for each supervisory level (i.e. Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, and Pay Pool Manager.) The assignment of supervisors to employees is used by CAS2NET to control access to employee performance appraisal by assigned officials only. The Pay Pool Administrators are assigned to pay pools which gives them access to rating data of all employees within the pay pool. Superusers have access to all employee records and can assume any CAS2NET user role to execute a CAS2NET function.

2.4 CAS2Net Conventions

CAS2Net implements common navigation conventions that are familiar to most website users.

- Movement among web pages is done by clicking on links. A link references another web page – links are usually underlined on display screen or when the mouse passes over the text.
- Each web page has logical links to other related web pages. You can also use the “Back” button on your browser to return to the previous page.
- Web pages often contain more information than can be displayed on your computer screen. In these cases, the page will have scroll bars along its right and/or bottom margins to give you access to the “hidden” information. Use the scroll bars to be sure you completely fill in all data entry screens.

- With Netscape, you can re-size the text in a page to adjust how much is visible at one time. To do this, first click anywhere in the page to set the “focus”. Then hold down the Ctrl key and press [to make the text smaller or] to make the text larger.
- Movement from page to page can be very quick or very slow, depending on the amount of traffic and the length and speed of the path the traffic must travel. It is possible for information packets to get “lost” in transmission, so if you click on a link and nothing happens for several minutes, click the “Stop” button on your browser and try the link again.
- If you click on a link and there is a long delay, you might get an error message something like “the file contains no data”. This could be due to your connection being so slow that your browser “times out”. If this happens, try the link again. If the problem persists contact AcqDemo Support Offices.

3. CAS2NET USER SESSION

3.1 User Login and Role Based Menu

This section describes how the system users will access the system and what they will see upon successful log-in based on their assigned role(s).

To access the URL: <https://acqdemoii.army.mil>

Note: CAS2Net is hosted on an Army server but services all DoD AcqDemo participants.
Contact your Pay Pool Administrator if you can't access the site.

1. When the Usage Policy screen is shown, click “I Agree” button to continue.

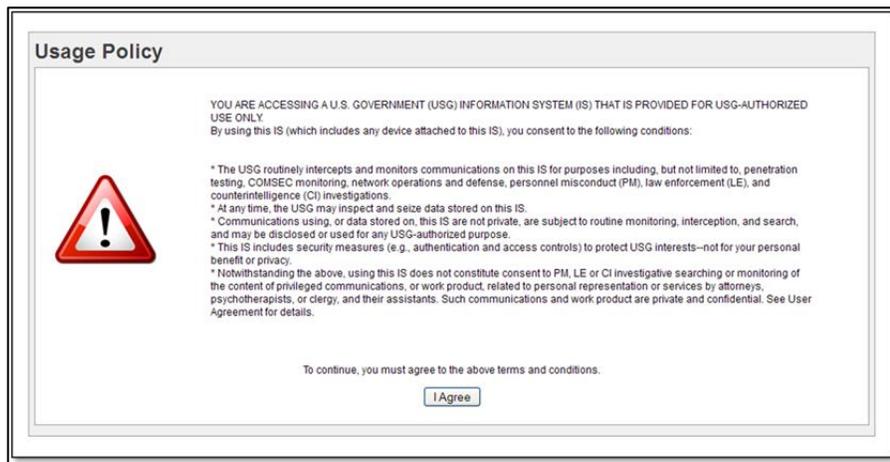


Figure 3-1: Usage Policy Screen

2. Next, click the “CAC Login” button to sign in.

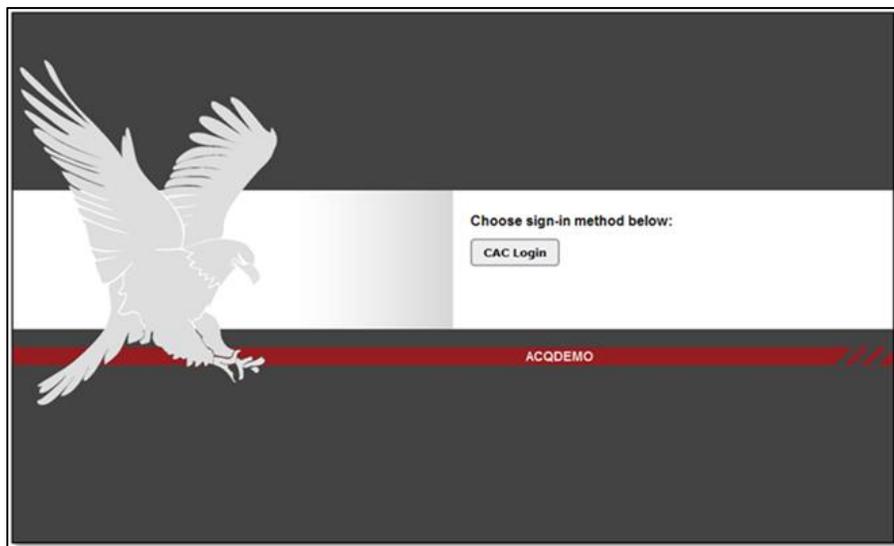


Figure 3-2: CAC Logo Screen

3. Select one of your installed CAC digital certificates and click the OK button.

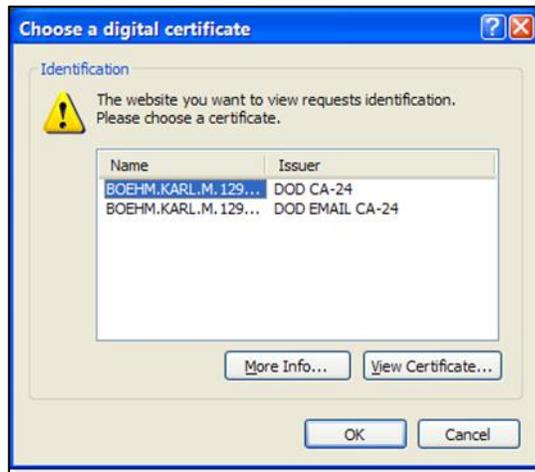


Figure 3-3: Digital Certification Selection Screen

If prompted, enter your CAC PIN.

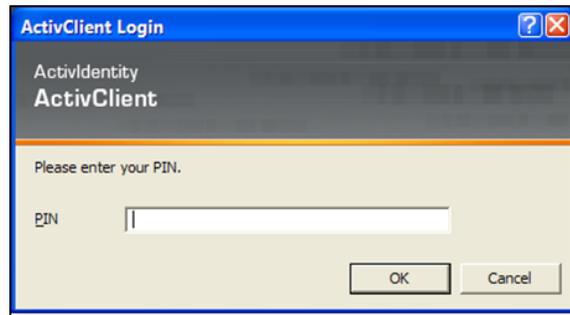


Figure 3-4: CAC Pin Entry Screen

4. CAS2Net successfully logs the user in and displays the “Welcome” greeting.

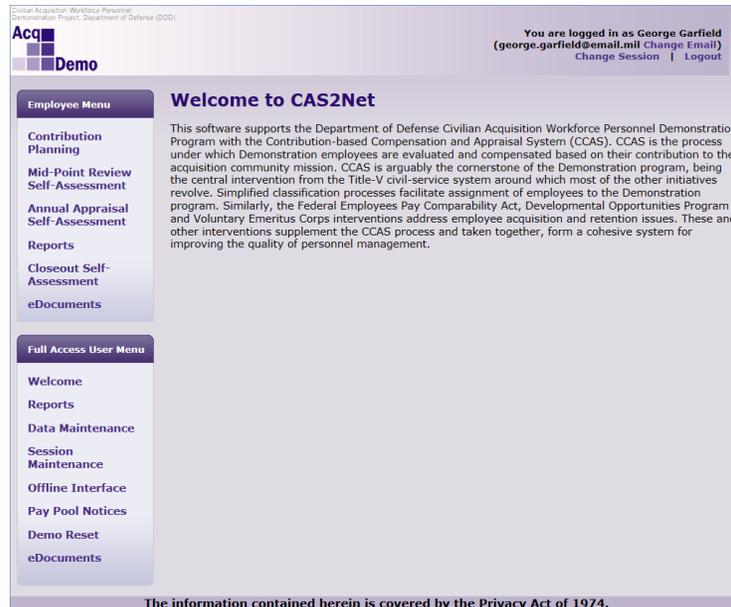


Figure 3-5: CAS2Net Welcome Screen

5. If your assigned role is Employee, then the navigation bar displays the **Employee Menu** with the following options: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Reports**, **Closeout Self-Assessment**, **eDocuments**, and **Welcome**.

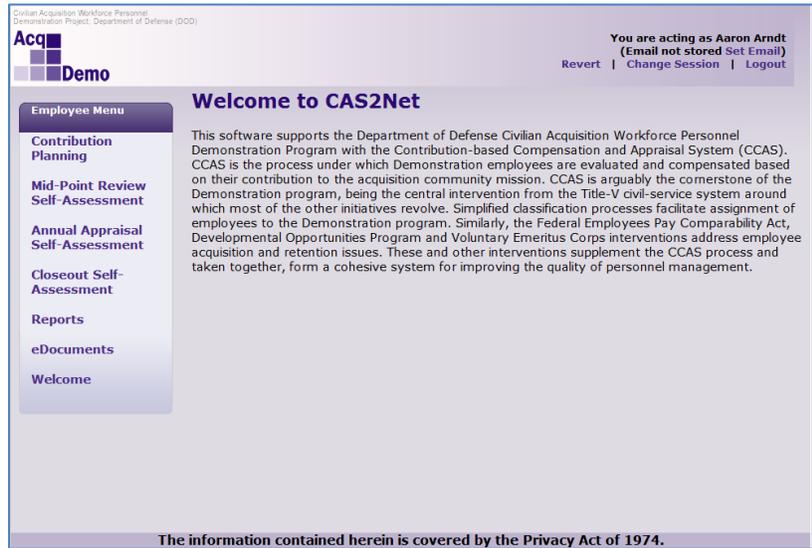


Figure 3-6: Employee Log In

6. If your assigned role is Level 1 Supervisor, then the navigation bar displays the **Supervisor I Menu** with the following options: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, **Closeout Assessment**, **Welcome**, **Reports**, and **eDocuments**.

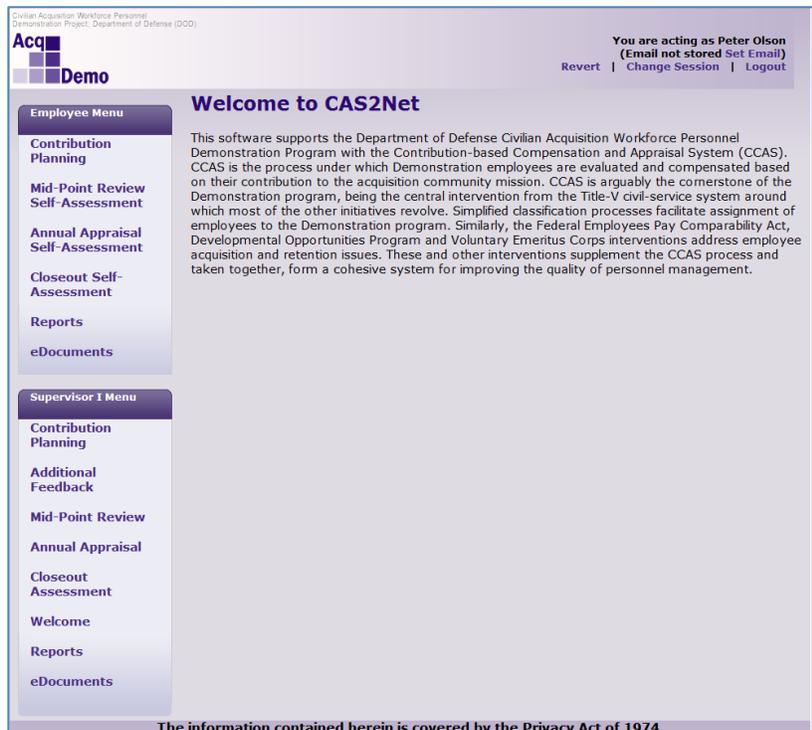


Figure 3-7: Level 1 Supervisor Log In

A Level 1 Supervisor who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

7. If your assigned role is Level 2 Supervisor, then the navigation bar displays the **Supervisor II Menu** with the following options: **Welcome**, **Reports** and **eDocuments**.

When the Level 2 Supervisor is responsible for assessing the performance of direct report “demo” employees, the supervisor assessment menu items are included in the Pay Pool Administrator Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

A Level 2 Supervisor who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

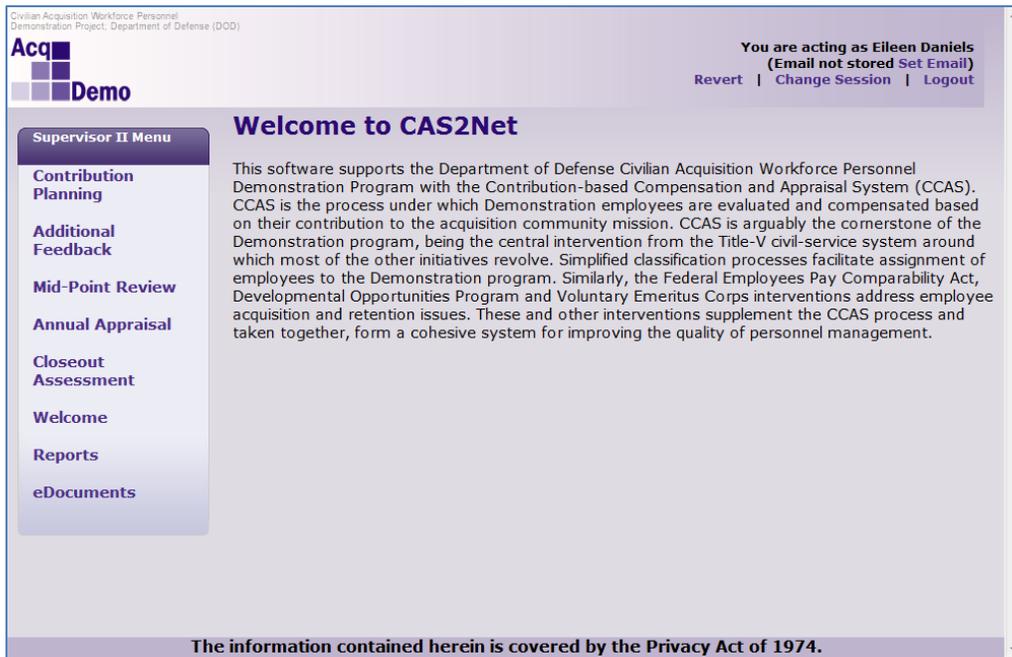


Figure 3-8: Level 2 Supervisor Log In

8. If your assigned role is Sub-Panel Manager, then the navigation bar displays the **Sub-Panel Manager Menu** with the following options: **Welcome**, **Sub-Panel Meeting**, **Reports**, **Appraisal Status**, and **eDocuments**.

When the Sub-Panel Manager is responsible for assessing the performance of direct report “demo” employees, the supervisor assessment menu items are included in the Sub-Panel Manager Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

A Sub-Panel Manager who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

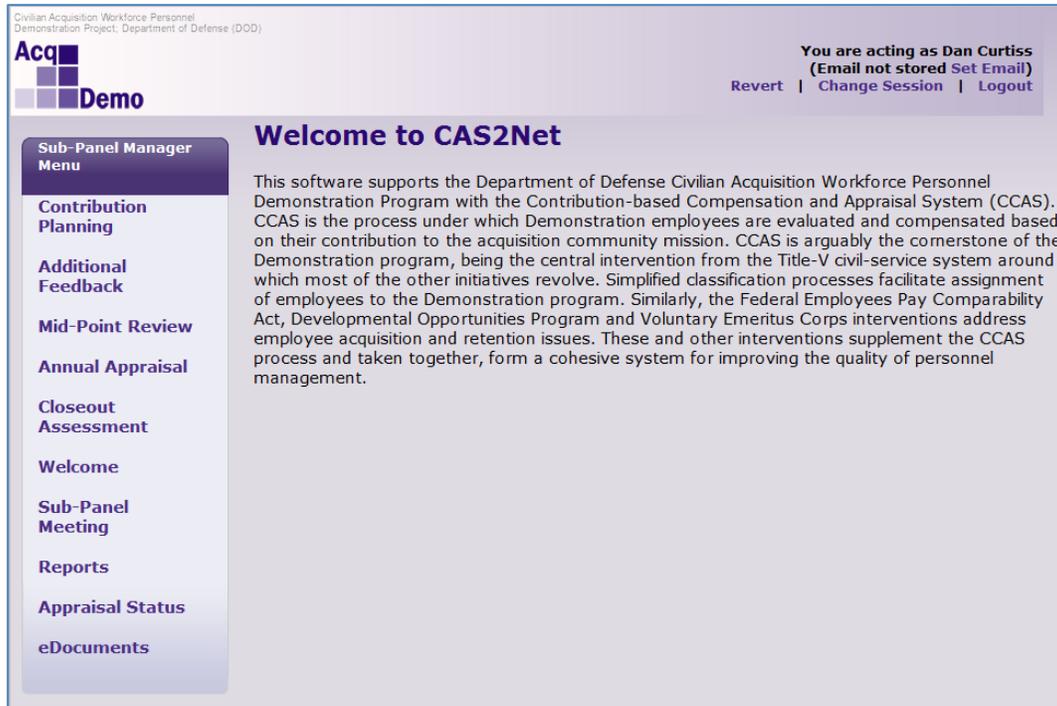


Figure 3-9: Sub-Panel Manager Log In

9. If your assigned role is Pay Pool Manager, then the navigation bar displays the **Pay Pool Manager Menu** with the following options: **Welcome**, **Sub-Panel Meeting**, **Reports**, **Appraisal Status**, and **eDocuments**.

When the Pay Pool Manager is responsible for assessing the performance of direct report “demo” employees, the supervisor assessment menu items are included in the Pay Pool Manager Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

A Pay Pool Manager who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

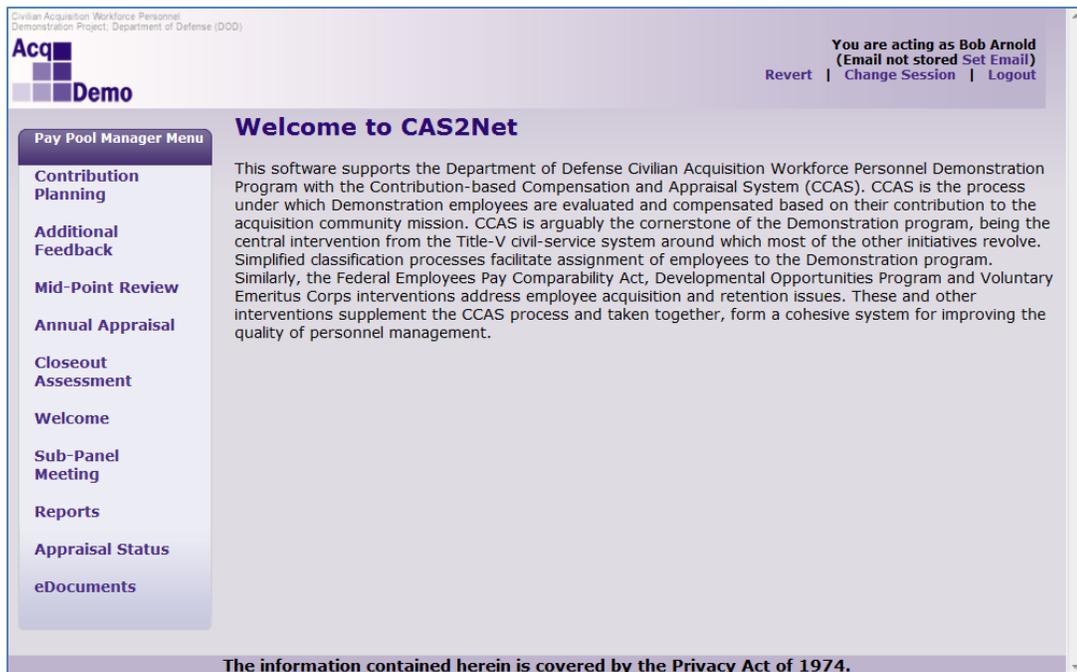


Figure 3-10: Pay Pool Manager Log In

10. If your assigned role is Pay Pool Administrator, then the navigation bar displays the **Pay Pool Administrator Menu** with the following options: **Welcome**, **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Offline Interface**, **Pay Pool Notices**, and **eDocuments**.

When the Pay Pool Administrator is responsible for assessing the performance of direct report “demo” employees, the supervisor assessment menu items are included in the Pay Pool Administrator Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

Pay Pool Administrator who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

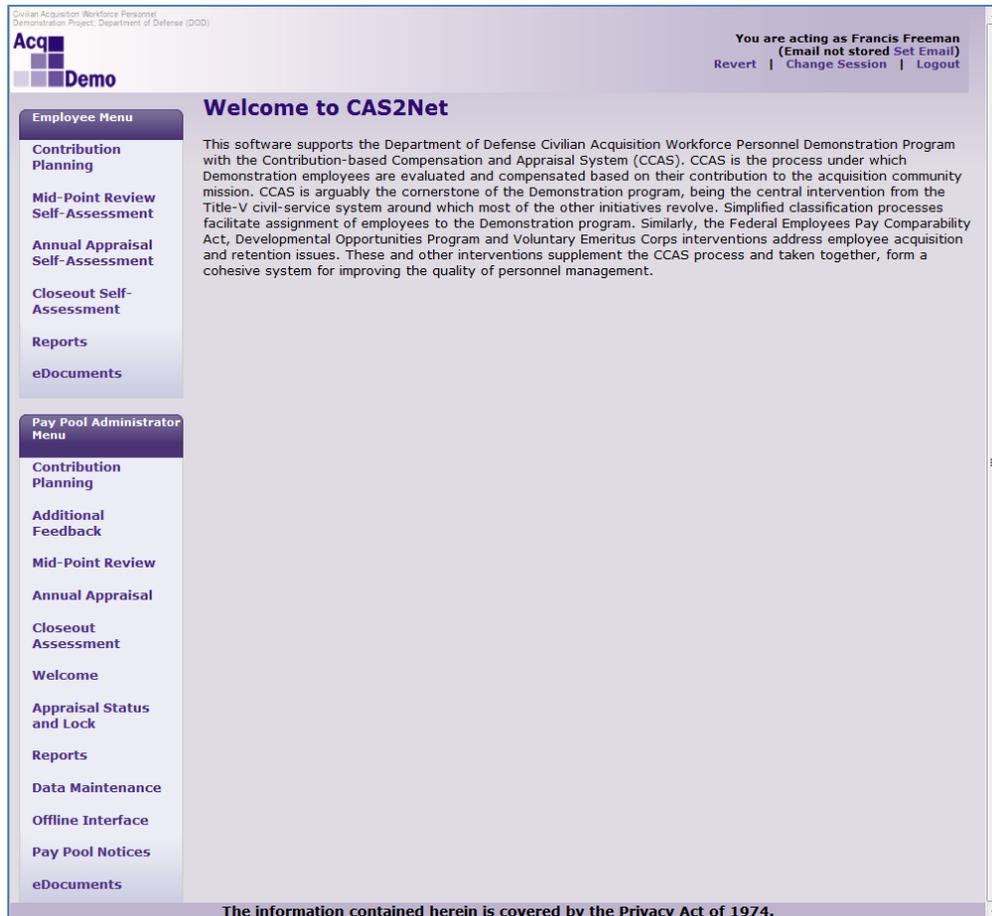


Figure 3-11: Pay Pool Administrator Log In

11. If your assigned role is Superuser, then the navigation bar displays the **Superuser Menu** with the following options: **Welcome**, **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Session Maintenance**, **Offline Interface**, **Pay Pool Notices**, and **eDocuments**.

When the Superuser is responsible for assessing the performance of direct report “demo” employees, the supervisor assessment menu items are included in the Superuser Menu: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

A Superuser who participates in pay pool processes as a “demo” employee will also see the **Employee Menu** and sub-menu items at the top of the navigation bar.

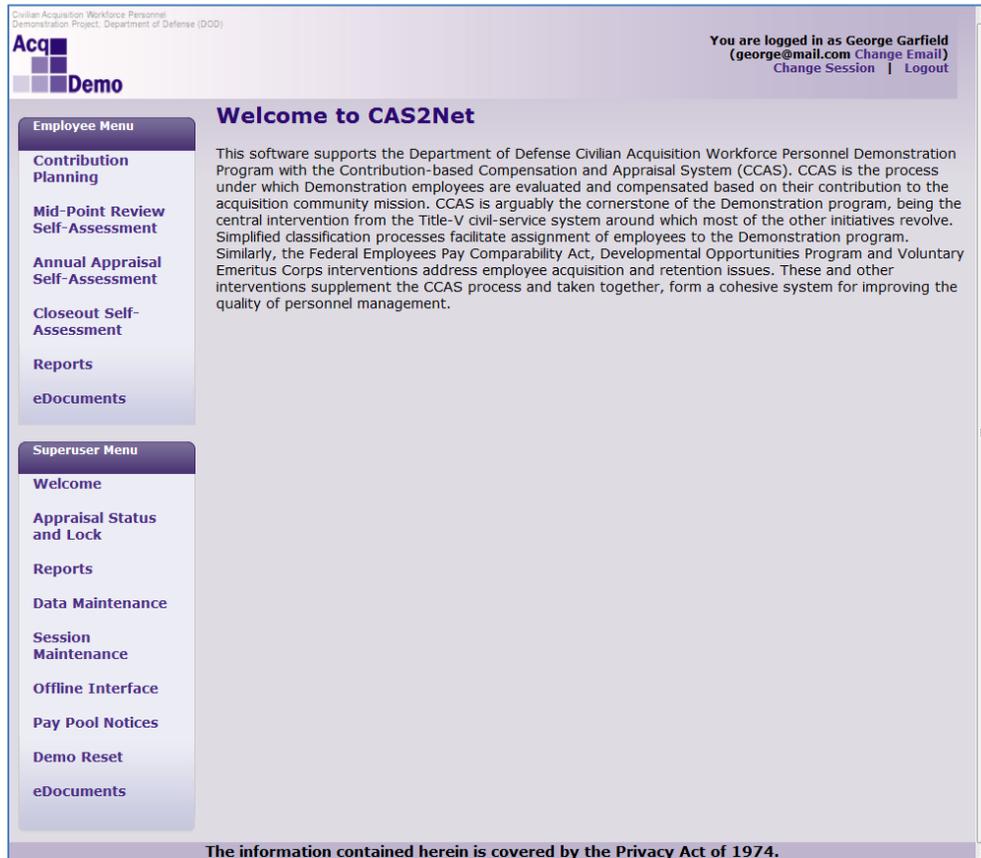
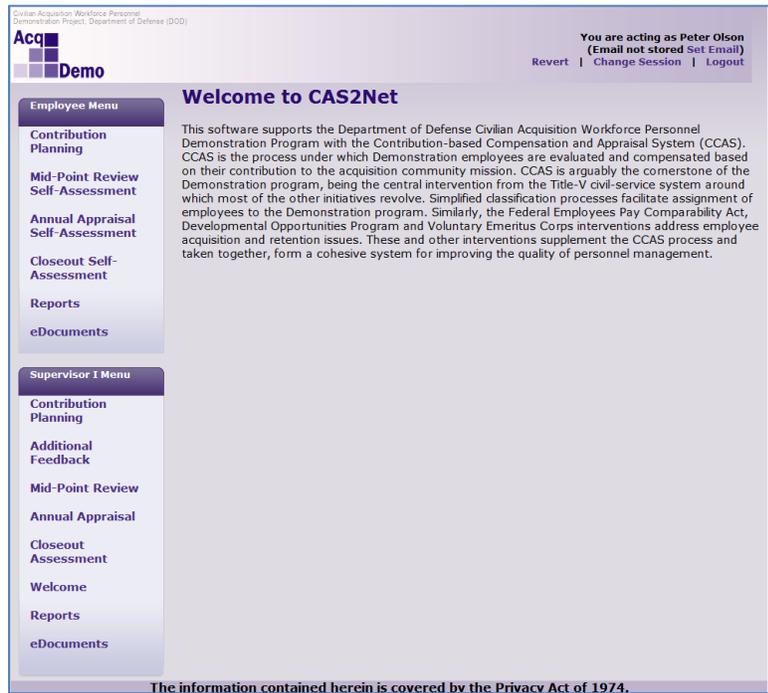


Figure 3-12: Superuser Log In

12. The CAS2Net navigation bar is customized for each user and provides access to functions that are explicitly or implicitly by your role and responsibilities. All “demo” employees—regardless of role—will see the **Employee Menu** at the top of the navigation bar.

Also, the navigation bar automatically includes supervisor assessment menu items for managers or administrators with direct report “demo” employee assignments.

The example below illustrates the CAS2Net navigation bar customized for a Level 1 Supervisor who is himself a “demo” employee and who has supervisor assessment responsibility for direct



reports.

Figure 3-13: “Multiple Roles” Log In

The following example illustrates the CAS2Net navigation bar customized for one of the various “Multi-Pay Pool User” user roles created to support AcqDemo components or regions.

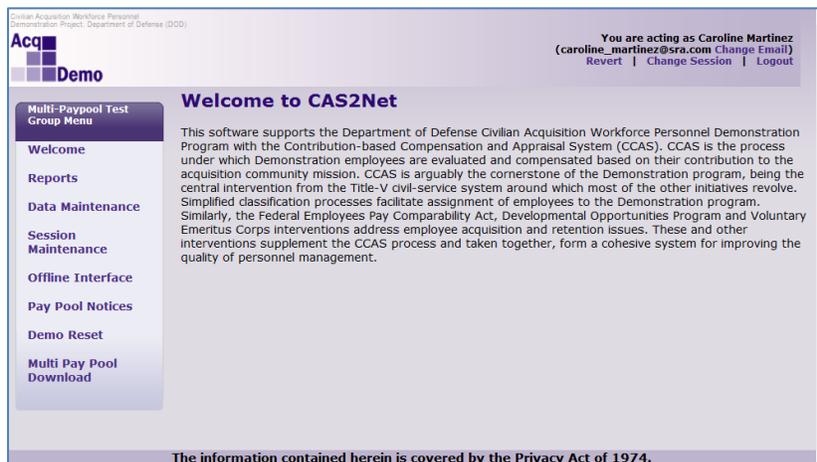


Figure 3-14: “Multi-Pay Pool User” Log In

3.2 Logout

This section describes how the system users log out the system and what they will see upon successful log-out.

1. Click “[Logout](#)” in the top right portion of the AcqDemo page banner.

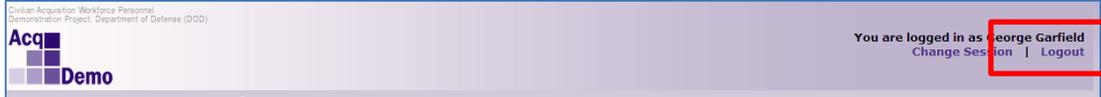


Figure 3-15: User Logout Link

2. CAS2Net displays AcqDemo logo screen with messages:
 - “You have logged out of CAS2Net!”
 - “Please close your browser to erase all login information.”

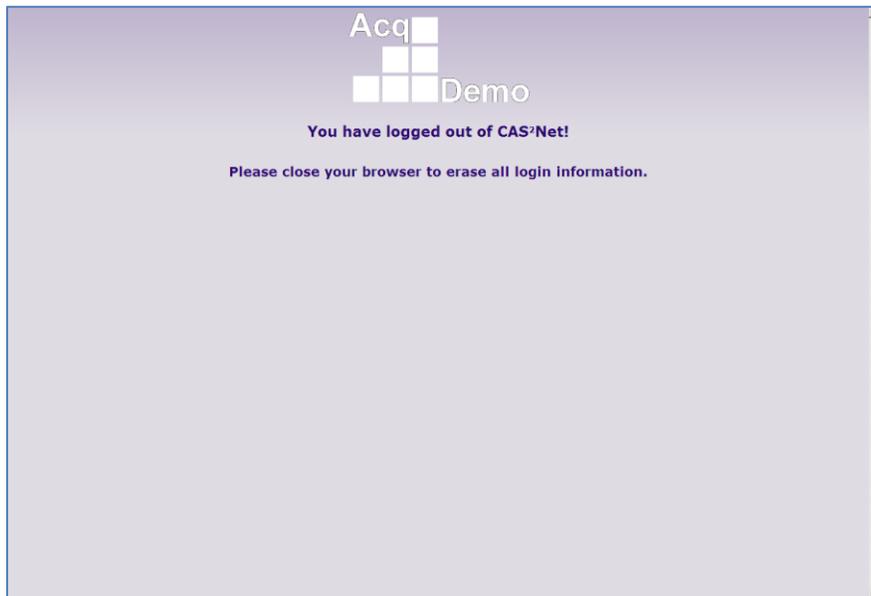


Figure 3-16: Log Out Message

3. Close the browser; CAS2Net will wipe out all login information of the logged on person.

3.3 Welcome to CAS2Net

Your login is successful when you are presented with the CAS2Net Welcome Screen. This is your home page where you will find the CCAS system description and user identification.

At any time throughout your session you may click **Welcome** in the left side navigation bar to return to this web page.

CAS2Net displays your user name and email address along with action buttons to update your user profile.

- Click **Set Email** to enter or modify your business email address.
- Click **Logout** to end your user session.

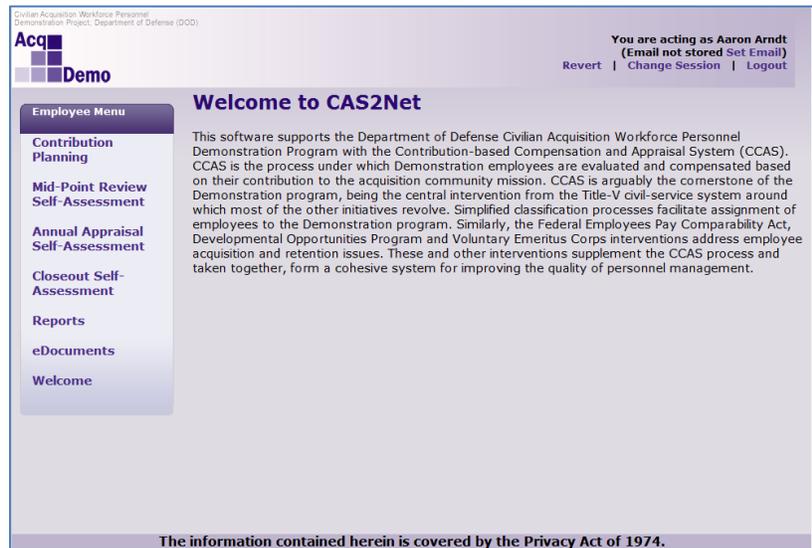


Figure 3-17: CAS2Net Welcome Screen

3.4 Timeout Alerts

User reports of “getting kicked-off” of the system without warning prompted the creation of the **Timeout Alert** feature. This section describes the Timeout Alert functionality and how it impacts your CAS2Net session.

Per DoD policy, CAS2Net strictly enforces a 15 minute timeout on inactive sessions. This may prove problematic for employees and supervisors entering or updating assessments. While CAS2Net must comply with the policy, the Timeout Alert feature gives you a prompt to act before being automatically logged off. The Timeout Alert applies to the editable assessment forms – i.e. Contribution Planning, Mid-Point, Closeout and Annual Appraisal Self Assessments, Mid-Point Review, Additional Feedback, Closeout Assessment and Annual Appraisal. It does not apply to the assessments that are displayed as “read only”.

FEATURE HIGHLIGHTS:

- Session status message displayed at the bottom of the web form indicates that the “Timeout Warning” feature is active.

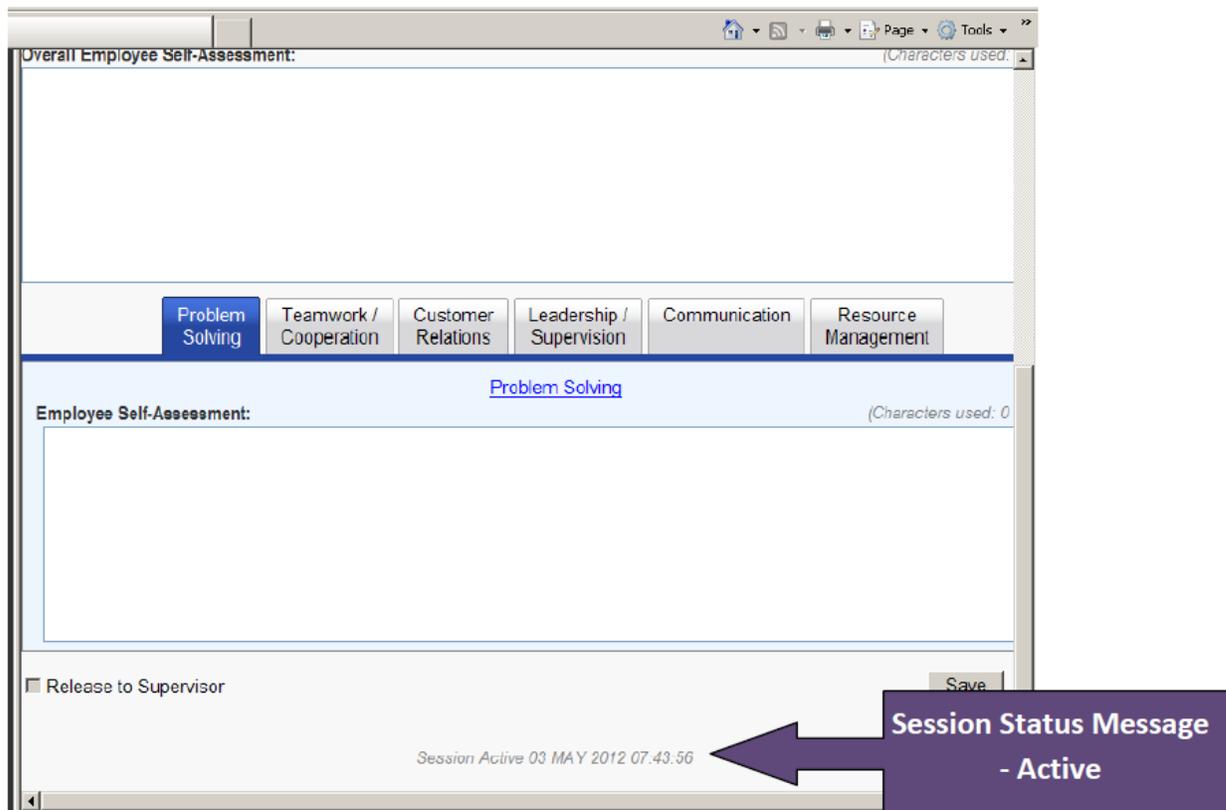


Figure 3-18: Session Status Message - Active

- Session status is updated periodically on the CAS2Net server to maintain the active session while you are working on the assessment form.
- If no activity is detected since the previous status message, succeeding session status updates show “Session Inactive” and a sequence number.

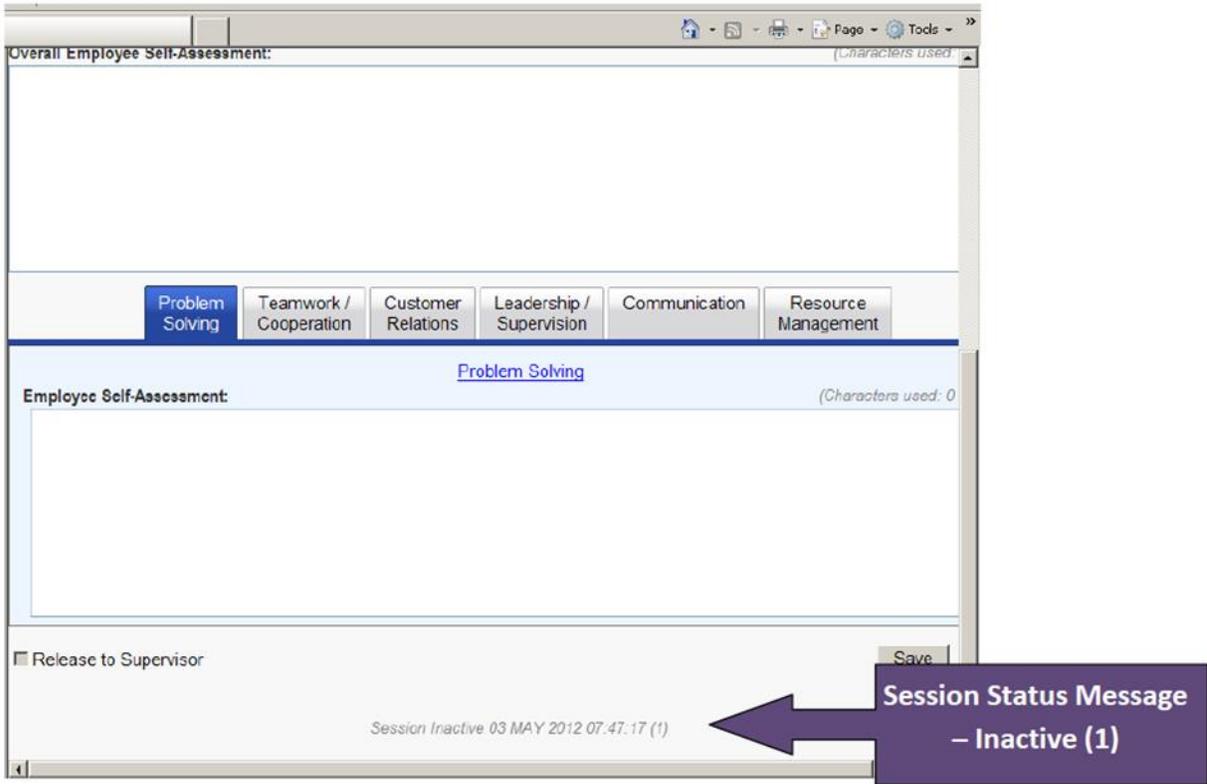


Figure 3-19: Session Status Message – Inactive (1)

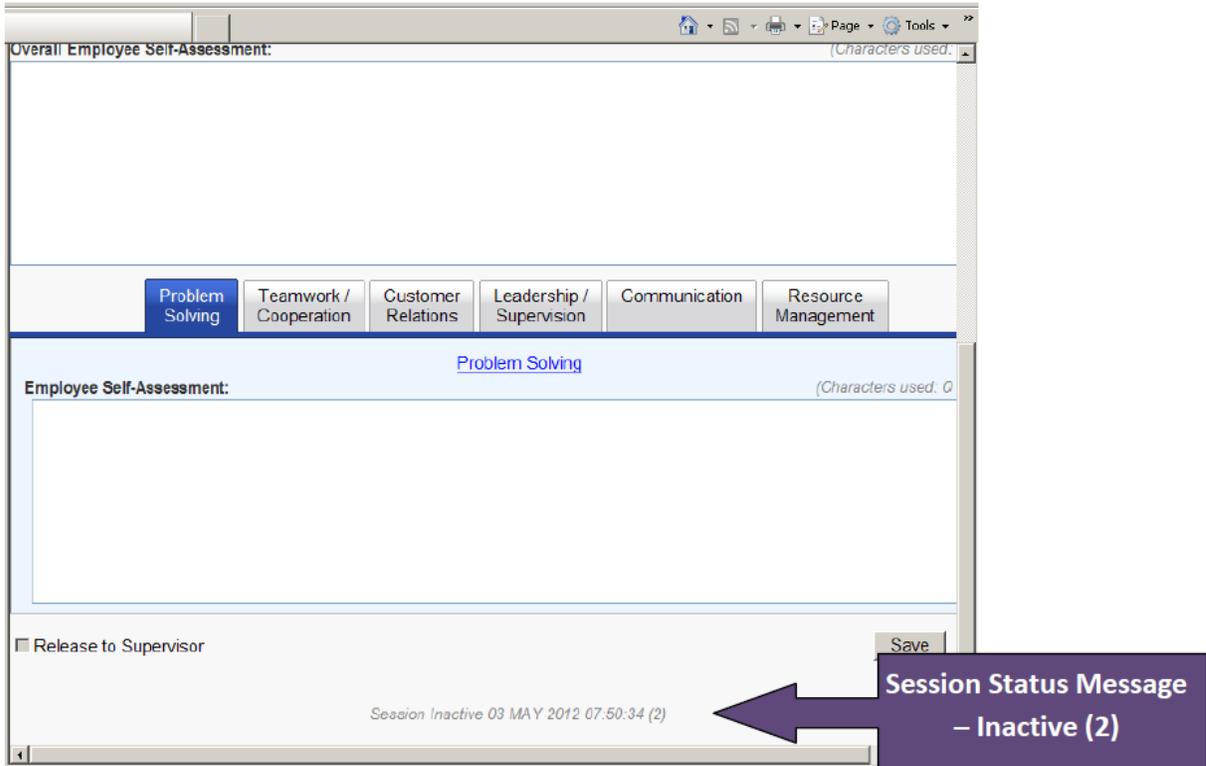


Figure 3-20: Session Status Message – Inactive (2)

- After three consecutive inactive session messages (approximately 10 minutes of inactivity), the “Session Timeout Alert” window pops-up a warning.

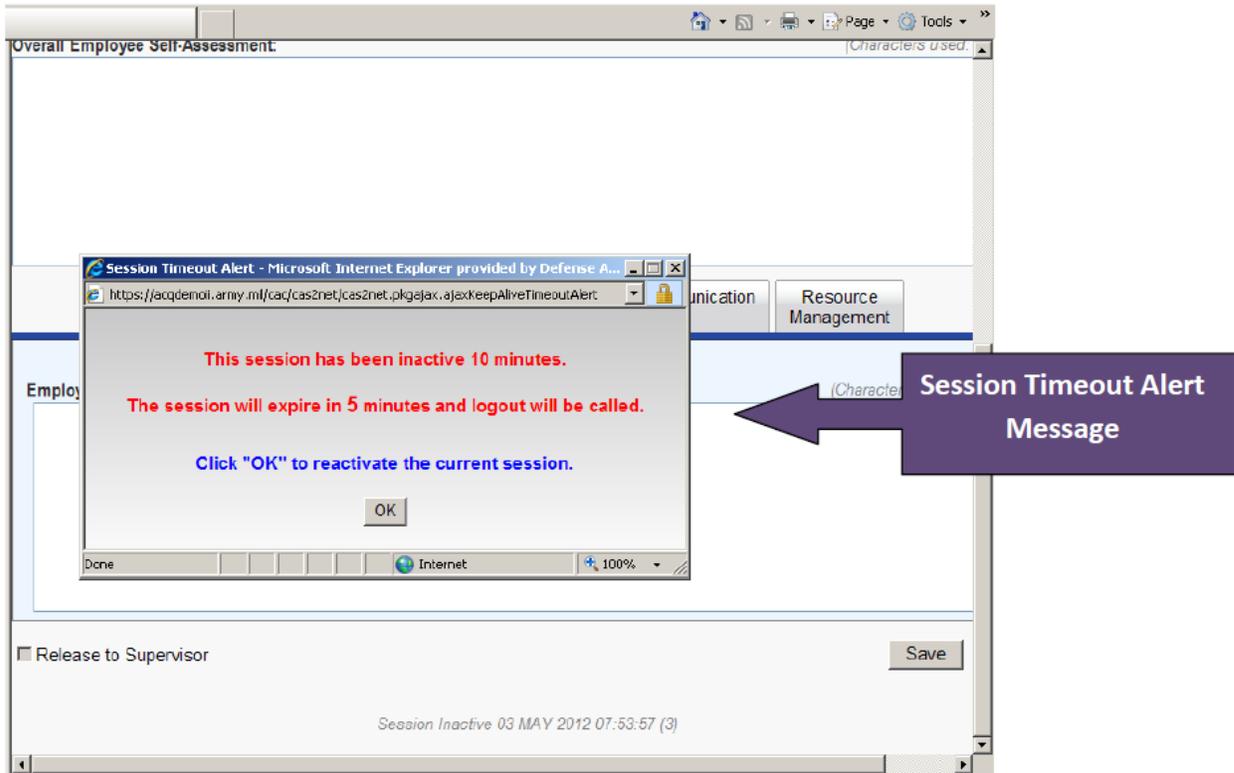


Figure 3-21: Session Timeout Alert Message

- The “inactive” and “expire in” minutes are updated every 60 seconds over the next 5 minutes.
- When the session expires, the alert window closes and you are automatically logged off.

Note. Typing into any assessment field (or clicking “Save”, “Submit” or “OK” to the alert prompt) refreshes the status and the process begins all over again.

3.5 Cycle Year Dropdown

With the addition of the Contribution Planning module, CAS2Net’s operational calendar became sensitive to overlapping performance/appraisal cycles. To this end, CAS2Net now supports two operating years: “Current” and “Next”.

CAS2Net’s “current year” is the fiscal year of the active appraisal cycle. CAS2Net’s “next year” is the following performance cycle fiscal year. Bounded by final year-end processes, CAS2Net’s operating year generally aligns with the Gregorian Calendar.

CAS2Net time sensitive features include the “Year” in web page subtitles. When screen content varies by year, the “Year” subtitle is displayed as a dropdown list; selecting a different year triggers a screen refresh.

Pay Pool Administrators have always had the capability to assign supervisors for “current year” processes. Now they have the additional flexibility to override assignments for “next year” tasks. This feature enables the PPA to assign supervisor (2) for “next year” Contribution Planning, *et.al.*, while supervisor (1) is still working on the “current year” appraisal.

CAS2Net differentiates supervisors by cycle year when “Year” subtitles are selected. Status web pages show employees assigned to the user for the given year. Selecting a different year may alter the list of assigned employees.

Civilian Acquisition Workforce Personnel
Demonstration Project: Department of Defense (DOD)

Acq Demo

You are acting as Chris Babbitt
Revert | Change Session | Logout

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

Contribution Planning Status

Year: 2014 ▾

Employee	Employee Input	Contribution Planning Status
Amy Artis		
Joe Contributor		
George Garfield		
Timothy Tarman		

Key:

- Contribution Planning Complete.
- Contribution Planning Incomplete.
- No Contribution Planning Provided.

Figure 3-22: Assigned Employees for Selected “Year”

When a supervisor clicks an employee name to view or edit a performance entry, CAS2Net displays the item for the selected year along with a “Year” dropdown list to view previous or future cycles.

When a different year is selected for which the employee is assigned to another supervisor, CAS2Net displays the content in “read only” mode with a note at the bottom of the page indicating that a different supervisor is responsible for the entry.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Erin Evans
[Revert](#) | [Change Session](#) | [Logout](#)

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports

Contribution Planning for coffee beans

Year: 2016

First Level Supervisor: Dan CURTISS

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
IV	21 - Community Planning Technician	NH - Business Management And Technical Management Professional	TBD

Contribution Planning - Effective 01OCT15 as of 05/20/2015 12:23:

Method of Communication: Face to Face
 TeleConference
 Video Conference
 Email
 Other

Date Conducted:

Note. Dan CURTISS is this employee's 1st Level Supervisor for cycle year 2016; this record is read only.

Figure 3-23: Unassigned Employee Record for Selected "Year"

3.6 Explanatory Notes

Business rules restrict modifications to performance records for a variety of reasons and understanding which rule applies at a given point is not intuitively obvious.

To increase transparency with respect to governing business rules, CAS2Net now provides one or more explanatory “Notes” at the bottom of the screen to stipulate why a given performance record may not be updated.

Note. The supervisor has posted the closing employee review date; this record is read only.
Current cycle appraisal scores have been saved; this record is read only.

Figure 3-24: CAS2Net Explanatory Notes

CAS2Net Explanatory Notes include:

- *[Supervisor name]* is this employee's 1st Level Supervisor for cycle year *[year]*; this record is read only.

The “Year” dropdown gave the supervisor “read only” access to records maintained by another supervisor. CAS2Net allows “read only” access to both “current year” and “next year” supervisors, but only the assigned supervisor for the selected year may modify record content.

- Current cycle appraisal scores have been saved; this record is read only.

Contribution Planning, Additional Feedback, Mid-Year Review and Closeout Assessments are not modifiable after appraisal scores are saved. The 1st Level Supervisor may temporarily reset all Annual Appraisal scores to “Unrated” to enable updates to other employee records.

- Employee Review Date is not editable until Pay Pool *[pay pool name]* has been certified.

For Annual Appraisals, the “Employee Review Tab” is updated after year-end processes are complete to signal that the appraisal has been reviewed with the employee. The date and method of communication are not relevant until after the pay pool is certified.

- Pay Pool *[pay pool name]* is certified; assessments for cycle year *[year]* are locked.

Updates to “current year” record content are not permitted after pay pool certification.

- Pay Pool *[pay pool name]* is certified--Annual Appraisal is read only; Employee Review Date may be entered or updated.

After pay pool certification the Annual Appraisal content is “read only” but date and method of communication is now eligible for update.

- Previous cycle records are read only.

The “Year” dropdown provides supervisors access to “current year”, “next year” and “prior year” employee records. In all cases “prior year” content is “read only”.

- Reference links to prior records are read only.

CAS2Net screens provide links to existing employee records for reference—for example, a link to the Mid-Year Review is provided as an aid to preparing the Annual Appraisal. Clicking the link opens a “read only” view of the record in a separate CAS2Net window.

- Supervisor *[supervisor name]* is working on the Annual Appraisal for this period; record is read only.

The employee may not update the Annual Appraisal Self-Assessment because the supervisor has saved the Annual Appraisal with a checkmark in “Lock Employee Self-Assessment”. The supervisor may remove the checkmark and click “Save” to enable employee updates.

- Supervisor *[supervisor name]* is working on the Closeout Assessment for this period; record is read only.

The employee may not update the Closeout Self-Assessment because the supervisor has saved the Closeout Assessment with a checkmark in “Lock Employee Self-Assessment”. The supervisor may remove the checkmark and click “Save” to enable employee updates.

- [Supervisor \[supervisor name\] is working on the Mid-Point Review for this cycle; record is read only.](#)

The employee may not update the Mid-Point Review Self-Assessment because the supervisor has saved the Mid-Point Review with a checkmark in “Lock Employee Self-Assessment”. The supervisor may remove the checkmark and click “Save” to enable employee updates.

- [The supervisor has already closed the Closeout Assessment for this period; record is read only.](#)

Date and method of communication of the employee review meeting has been submitted indicating that this Closeout Assessment is closed.

A “Reopen” button is provided in the “Employee Review Date” tab when the Closeout Assessment is eligible to be reopened for updates.

- [The supervisor has already closed the Mid-Point Review for this cycle; this record is read only.](#)

Date and method of communication of the employee review meeting has been submitted indicating that this Closeout Assessment is closed.

A “Reopen” button is provided in the “Employee Review Date” tab when the Closeout Assessment is eligible to be reopened for updates.

- [The supervisor has posted the closing employee review date; this record is read only.](#)

Date and method of communication of the employee review meeting has been submitted indicating that this record is closed.

The supervisor may use the “Modify” button to generate a new instance of Contribution Planning or the “Create” button to generate a new instance of Additional Feedback.

- [This appraisal status is "locked"; content is read only.](#)

Updates are not permitted because the Pay Pool Administrator has “locked” this Annual Appraisal.

- [Refer questions related to this document to the Pay Pool Administrator or \[employee\]'s 1st Level Supervisor, \[1st Level Supervisor\].](#)

The CAS2Net Document Repository provides correction capabilities to enable the Pay Pool Administrator or appraisal period 1st Level Supervisor to resolve user errors or file upload discrepancies.

4. EMPLOYEE

This section describes the employee role and how to use CAS2Net to participate in the assessment process. CAS2Net supports the employee's ability to create and modify Contribution Planning criteria and objectives and provide a personal Self-Assessment for Mid-Point Review and Annual Appraisal.

The Employee will have the following options appear in the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, **Reports**, **eDocuments**, and **Welcome**.

- The **Contribution Planning** option allows the employee to collaborate with his supervisor to create or modify objectives for the current performance cycle.
- **Mid-Point Review Self-Assessment** enables the employee to document his own evaluation of his performance.
- The **Annual Appraisal Self-Assessment** allows the employee to evaluate his achievements with respect to each AcqDemo performance factor.
- **Closeout Self-Assessment** enables the employee to rate his performance for partial year position assignments.
- The **Reports** option provides the capability to generate reports for each of the features above as well as Additional Feedback provided by the Level 1 Supervisor.
- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports.
- **Welcome** displays the CAS2Net welcome screen.

4.1 Contribution Planning

Click "Contribution Planning" from the navigation bar. CAS2Net refreshes the screen to display the "Contribution Planning" screen.

After discussion with their supervisor, employees can initiate the Contribution Planning process if there is no current plan by entering text and clicking on the Save button. This creates a draft plan that both employee and supervisor can view and edit.

For your information, the Contribution Planning page displays the following attributes:

- First Level Supervisor Name
- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

The screenshot shows the 'Contribution Planning for Adam A. Appleton' web form. At the top, it indicates the user is acting as Adam A. Appleton and provides options to Revert, Change Session, or Logout. The form is titled 'Contribution Planning for Adam A. Appleton' and shows the 'Year' as 2015. Key employee information includes: Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, and Expected OCS Range: 66 - 69 - 73. The 'First Level Supervisor' is George Fites. The 'Contribution Planning Effective Date' is set to 10/01/2014, with a calendar control for October 2014. Below this, there are two textboxes: 'Mandatory Objectives' (containing 'None') and 'Individual Objectives' (with a character count of 0 of 6000). At the bottom, there is a checkbox for 'Employee Narrative Complete' and 'Save' and 'Exit' buttons. The session is active as of 07 MAY 2015 15:29:38.

Figure 4-1: Employee Contribution Planning Web Form

The “Contribution Planning Effective Date” defaults to the first day of the performance cycle—*e.g.* “10/01/2015” for fiscal year 2016. If necessary, use the calendar control to select appropriate dates.

Enter performance objectives into the “Contribution Planning ‘In Progress’” textbox.

When finished entering information, the employee should check “Employee Narrative Complete” and click “Save” to inform the supervisor that his input is complete. The “Employee Narrative Complete” checkbox is for information only. As long as status remains “In Progress”, the employee may later clear the checkbox and click “Save” to let the supervisor know that employee input status is again incomplete.

Once the supervisor finalizes the plan and submits it, no further changes are permitted—with two exceptions:

- 1) If the supervisor performs the Contribution Planning “Modify” feature, then CAS2Net generates a new working copy of Contribution Planning and accepts updates from either the supervisor or employee.

COMPLETED CONTRIBUTION PLANNING

Whenever Contribution Planning is in a “submitted” state or Annual Appraisal evaluations have begun, the employee will have read only access to the Contribution Plan content.

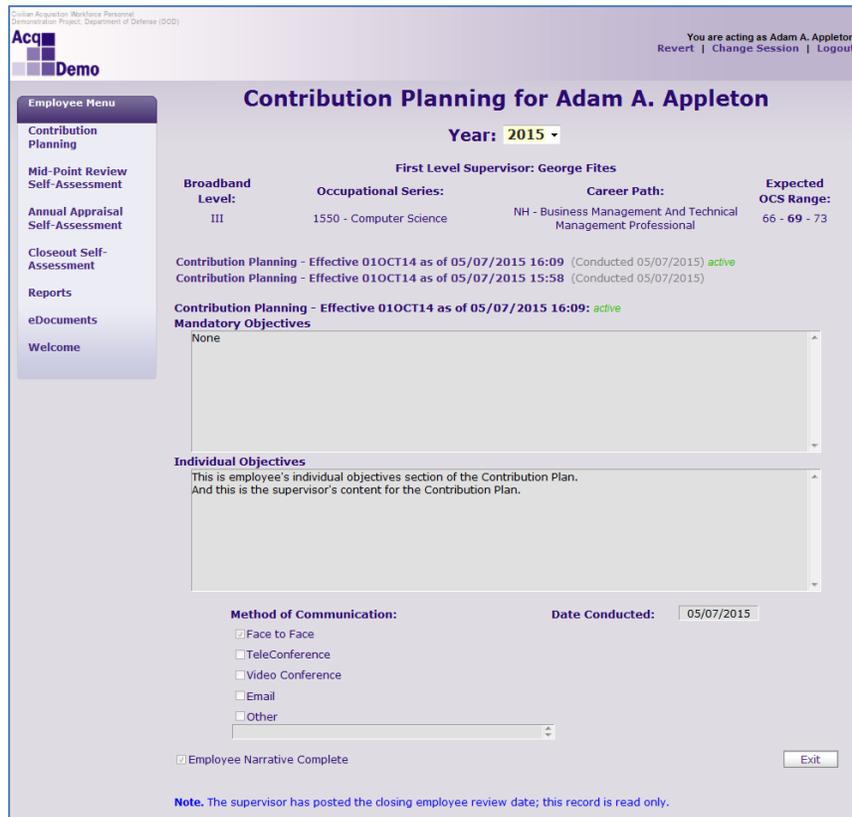


Figure 4-2: Completed Employee Contribution Planning

NEXT CYCLE YEAR CONTRIBUTION PLANNING

CAS2Net is focused on annual appraisals and pay pool operations at the same time that new Contribution Planning is being documented for the next performance year. To accommodate business cycle overlap, CAS2Net allows employees to choose between the previous and next cycle years.

The Contribution Planning “Year” is presented as a dropdown that defaults to the current appraisal cycle. CAS2Net also provides options to select the “Previous Year” for historical purposes, or the “Next Year” to input information for the following performance period.

Select the “Next Year” in the dropdown list to switch to next year’s Contribution Planning page.

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Adam A. Appleton
Revert | Change Session | Logout

Contribution Planning for Adam A. Appleton

Year: 2016

First Level Supervisor: George Fites

Broadband Level: III Occupational Series: 1550 - Computer Science Career Path: NH - Business Management And Technical Management Professional Expected OCS Range: TBD

Contribution Planning Effective Date: 10/01/2015

October 2015						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Contribution Planning Input:

Mandatory Objectives (Characters used: 0 of 6000)

None

Individual Objectives (Characters used: 0 of 6000)

Employee Narrative Complete

Save Exit

Session Active 07 MAY 2015 16:13:42

Figure 4-3: “Next Cycle Year” Employee Contribution Planning Web Form

The capability to create “next cycle year” Contribution Planning as well as “active appraisal cycle” Contribution Planning makes it imperative that employees correctly select the appropriate year from the dropdown provided at the top center of the Contribution Planning screen in creating a plan for either year.

Notes.

1. The “Character Count” shown on the right just above the Contribution Planning textbox shows the actual number of characters entered.
When the 6000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.
2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from submitting the date and method of communication signaling that the Contribution Planning is closed.
3. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Mid-Point Review Self-Assessment, and Closeout Self-Assessment.
4. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.2 Mid-Point Review Self-Assessment

Click “Mid-Point Review Self-Assessment” from the navigation bar. CAS2Net refreshes the screen to display the “Mid-Point Review Self-Assessment” screen.

For your information, the Mid-Point Review Self-Assessment page displays the following attributes:

- First Level Supervisor Name
- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

The “Mid-Point Review Self-Assessment” consists of two main parts:

- “Contribution Planning” which has been reviewed and submitted by the supervisor is displayed as “read only”. The Contribution Planning “Effective Date” is included in the subtitle.
- “Employee Self-Assessment” where the employee enters his achievements with respect to each AcqDemo performance factor.

The screenshot displays the "Mid-Point Review Self-Assessment" web form for Adam A. Appleton. The page includes a navigation menu on the left with options like "Contribution Planning", "Mid-Point Review Self-Assessment", and "Annual Appraisal Self-Assessment". The main content area shows the employee's details, including the First Level Supervisor (George Fites), Broadband Level (III), Occupational Series (1550 - Computer Science), Career Path (NH - Business Management And Technical Management Professional), and Expected OCS Range (66 - 69 - 73). The form is set for the year 2015. Below the details, there are sections for "Mandatory Objectives" (None) and "Individual Objectives" (This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.). At the bottom, there are tabs for performance factors: Problem Solving, Teamwork / Cooperation, Customer Relations, Leadership / Supervision, Communication, and Resource Management. The "Problem Solving" tab is selected, showing a text area for the employee's self-assessment. A checkbox labeled "Employee Narrative Complete" is present, along with "Save" and "Exit" buttons. The session is active on 08 MAY 2015 10:51:34.

Figure 4-4: Mid-Point Review Self-Assessment Web Form

- Click on any performance factor tab to input the assessment for that factor.
- Click the factor name “hotlink” above the textbox to access descriptor and discriminators for the respective factor.
- Check “Employee Narrative Complete” and then click “Save” when you are satisfied with your evaluation to inform your supervisor that the self-assessment is complete.
- Uncheck “Employee Narrative Complete” and click “Save” to revert the self-assessment status to “In Progress” indicating to the supervisor that you have additional input.

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from locking the Mid-Point Review Self-Assessment.
3. The self-assessment page is displayed as “read only” when the supervisor has saved the Mid-Point Review with a checkmark in “Lock Employee Self-Assessment”.
4. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Mid-Point Review Self-Assessment, and Closeout Self-Assessment.
5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.3 Annual Appraisal Self-Assessment

Click “Annual Appraisal Self-Assessment” from the navigation bar. CAS2Net refreshes the screen to display the “Annual Appraisal Self-Assessment” screen.

For your information, the Annual Appraisal Self-Assessment page displays the following attributes:

- First Level Supervisor Name
- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

The “Annual Appraisal Self-Assessment” consists of two main parts:

- “Contribution Planning” which is reviewed, modified, and submitted by the supervisor and shown as “read only”. The Contribution Planning “Effective Date” is included in the subtitle.
- “Employee Self-Assessment” where employee enters his achievements with respect to each AcqDemo performance factor.

The screenshot shows the 'Annual Appraisal Self-Assessment for Adam A. Appleton' web form. At the top, it indicates the user is acting as Adam A. Appleton and provides options to Revert, Change Session, or Logout. The form is titled 'Annual Appraisal Self-Assessment for Adam A. Appleton' and is for the year 2015. It shows the First Level Supervisor as George Fites. Key attributes displayed include Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, and Expected OCS Range: 66 - 69 - 73. The 'Contribution Planning - Effective 01OCT14: Mandatory Objectives' section shows 'None'. The 'Individual Objectives' section contains a placeholder text: 'This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.' Below this, it indicates the 'Mid-Point Review Self-Assessment as of 05/08/2015 10:51 (In Progress)'. A row of performance factor tabs is visible: Problem Solving (selected), Teamwork / Cooperation, Customer Relations, Leadership / Supervision, Communication, and Resource Management. The 'Problem Solving' section has an 'Employee Self-Assessment' text area with a character count of 62 of 4000. At the bottom, there is a checkbox for 'Employee Narrative Complete' and 'Save' and 'Exit' buttons. The session active time is 08 MAY 2015 13:05:35.

Figure 4-5: Annual Appraisal Self-Assessment Web Form

- Click on any performance factor tab to input the assessment for that factor.
- Click the factor name “hotlink” above the textbox to access descriptor and discriminators for the respective factor.

- Check “Employee Narrative Complete” and then click “Save” when you are satisfied with your evaluation to inform your supervisor that the self-assessment is complete.
- Uncheck “Employee Narrative Complete” and click “Save” to revert the self-assessment status to “In Progress” indicating to the supervisor that you have additional input.

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from does not prevent the supervisor from locking the Annual Appraisal.
3. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Mid-Point Review Self-Assessment, and Closeout Self-Assessment.
4. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.4 Closeout Self-Assessment

CAS2Net supports one or more Closeout Assessments for an employee during a performance cycle to evaluate employee performance for partial year position assignments. Either the employee or the supervisor can initiate the Closeout process.

CLOSEOUT SELF-ASSESSMENT STATUS

When “Closeout Self-Assessment” is selected in the Employee Menu, CAS2Net displays the “Closeout Self-Assessment Status” for the employee.

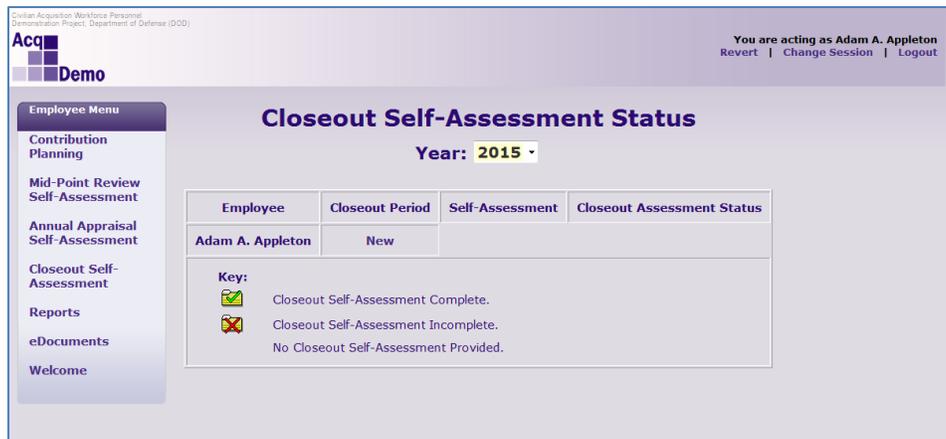


Figure 4-6: Employee Closeout Self-Assessment Status

CAS2Net lists Closeout details along with status columns:

- **Employee**—Name of the individual
- **Closeout Period**—Start and end dates of existing Closeout Assessment record(s); “New” provides access to an empty web form for defining a new Closeout period.
- **Self-Assessment**—status values include:
 - Green ‘checkmark’ = ‘Closeout Self-Assessment Complete’
 - Red ‘X’ = ‘Incomplete’ (In Progress)
 - (blank) = Not Provided
- **Closeout Assessment Status**—values indicating supervisor status include:
 - Green ‘checkmark’ = ‘Closeout Assessment Complete’
 - Red ‘X’ = ‘Incomplete’ (In Progress)
 - (blank) = Not Provided

CLOSEOUT SELF-ASSESSMENT WEB FORM

Click a specific date range under Closeout Period to update the Closeout Self-Assessment for an existing Closeout period –or–click “New” initiate the Closeout Self-Assessment for a new Closeout Period.

CAS2Net refreshes the screen to display the “Closeout Self-Assessment” web form.

For your information, the Closeout Self-Assessment page displays the following attributes:

- First Level Supervisor Name
- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

The “Closeout Self-Assessment” consists of three main parts:

- Closeout details: Closeout Period “Start Date”, “End Date” and “Reason for Closeout Assessment”.
- “Contribution Planning” which has been reviewed and submitted by the supervisor is displayed as “read only”. The Contribution Planning “Effective Date” is included in the subtitle.
- “Employee Self-Assessment” where employee enters his achievements overall or with respect to each AcqDemo performance factor.

Acq Demo You are acting as Adam A. Appleton
Revert | Change Session | Logout

Closeout Self-Assessment for Adam A. Appleton

Year: **2015**

First Level Supervisor: George Fites

Broadband Level: III **Occupational Series:** 1550 - Computer Science **Career Path:** NH - Business Management And Technical Management Professional **Expected OCS Range:** 66 - 69 - 73

Start Date: 10/1/2014 **End Date:**

May 2015							June 2015						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	1	2	3	4
31	1	2	3	4	5	6	5	6	7	8	9	10	11

Reason for Closeout Assessment:

Contribution Planning - Effective 01OCT14:
Mandatory Objectives
 None

Individual Objectives
 This is employee's individual objectives section of the Contribution Plan.
 And this is the supervisor's content for the Contribution Plan.

Mid-Point Review Self-Assessment as of 05/08/2015 10:51 (In Progress)

Overall Employee Self-Assessment: (Characters used: 0 of 4000)

Problem Solving

Employee Self-Assessment: (Characters used: 0 of 4000)

Employee Narrative Complete

Session Active 08 MAY 2015 13:12:14

Figure 4-7: Closeout Self-Assessment Web Form

- Select “Start Date” and “End Date” in the calendar interval control.
- Select “Reason for Closeout Assessment” from the dropdown list. For option “Other”, enter explanatory text in the space provided.
- Enter “Overall Employee Self-Assessment” narrative text.

And | Or

- Click on any performance factor tab to input the assessment for that factor.
- Click the factor name “hotlink” above the textbox to access descriptor and discriminators for the respective factor.
- Check “Employee Narrative Complete” and then click “Save” when you are satisfied with your evaluation to inform your supervisor that the self-assessment is complete.
- Uncheck “Employee Narrative Complete” and click “Save” to revert the self-assessment status to “In Progress” indicating to the supervisor that you have additional input.

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *saveable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from locking the Closeout Self-Assessment.
3. The self-assessment page is displayed as “read only” when the supervisor has saved the Closeout Assessment with a checkmark in “Lock Employee Self-Assessment”.
4. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Mid-Point Review Self-Assessment, and Closeout Self-Assessment.
5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.5 Reports

When “Reports” is clicked in the Employee Menu, CAS2Net presents the “Employee Reports” menu which includes the following:

- Contribution Planning
- Additional Feedback
- Annual Appraisal Self-Assessment
- Appraisal Form Parts I, II and III – Single Employee
- Mid-Point Self-Assessment
- Mid-Point Review
- Closeout Self-Assessment
- Closeout Assessment



Figure 4-8: Employee Reports Menu

Click on the report name to bring up the corresponding report options page. Make selections as indicated and click “Generate”.



Figure 4-9: Employee Reports Options

Reference section “10.1 Employee Reports” for sample employee reports.

Contribution Planning for Adam A Appleton Year: 2015			
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 69
Contribution Planning:			
Mandatory Objectives: None			
Individual Objectives: This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.			
Method of Communication: Face to Face		Date Conducted: 05/07/15	

Figure 4-10: Sample Employee Report

4.6 eDocuments - CAS2Net Document Repository

When end of cycle processes are complete and Annual Appraisals have been approved for employee review, both the employee and the 1st Level Supervisor will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository.

The steps below describe how the employee can use the CAS2Net Document Repository to digitally sign the final approved Annual Appraisal.

EDOCUMENT STATUS

Click “eDocuments” in the Employee Menu of the navigation bar to view the status of Annual Appraisal records in the CAS2Net Document Repository.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Adam A. Appleton
Revert | Change Session | Logout

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports
- Closeout Self-Assessment
- eDocuments
- Welcome

eDocument Status - Annual Appraisal(s) for Adam A. Appleton

Year	eDocument Status	Employee Signature	Supervisor Signature	Manager Signature (Optional)
2015				
2014				

Key:

- Pending Final Approval. Employee Annual Appraisal document is not ready for signatures.
- (blank) Not Provided.
- Incomplete.
- Complete.

Figure 4 11: Employee eDocument Status by Year

The employee’s “eDocument Status” page summarizes CAS2Net Document Repository information by appraisal year. Note that the CAS2Net Document Repository applies only to appraisal cycles 2015 and beyond.

- “Year” number is a hot link to drill down to the repository record details.
 - Note that all blank columns to the right of the “Year” number indicate that the Annual Appraisal has been NOT been approved for employee review and is not available for signatures.
- The “eDocument Status reflects the overall status of the CAS2Net Document Repository record.
 - A green checkmark indicates the PDF file has been uploaded with employee and 1st Level Supervisor signatures certified complete. No further action is required.
 - A red “X” indicates that the Annual Appraisal has been approved for employee review but CAS2Net Document Repository information is incomplete.
 - Either the employee or 1st Level Supervisor signature is incomplete, or CAS2Net does not have a current active PDF file.
 - Blank “eDocument Status” indicates the Annual Appraisal has not been approved for employee review.

- A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
- The “Employee Signature” column indicates whether the employee signature has been certified complete.
 - A green checkmark indicates the PDF file has been uploaded with the employee signature certified complete.
 - A red “X” indicates the employee signature has not been certified complete.
 - Blank indicates the Annual Appraisal is not ready for the employee’ signature. Either the Annual Appraisal has not been approved for employee review, or the PDF file has not yet been uploaded. (Later steps address uploading Annual Appraisal PDF file.)
- “Supervisor Signature” indicates whether the 1st Level Supervisor signature has been certified complete.
 - A green checkmark indicates the PDF file has been uploaded with 1st Level Supervisor’s signature certified complete.
 - A red “X” indicates the 1st Level Supervisor signature has not been certified complete.
 - Blank indicates Annual Appraisal is not ready for the 1st Level Supervisor signature. Either the Annual Appraisal has not been approved, or the PDF file has not yet been uploaded.
- The “Manager Signature” indicates whether a manager’s signature has been certified complete. Note that a higher level supervisor or manager signature is optional.
 - A green checkmark indicates the PDF file has been uploaded with at least one higher level supervisor or manager signature certified complete.
 - A red “X” indicates at least one higher level supervisor or manager signature is outstanding for this document.
 - Blank indicates Annual Appraisal is not ready for a higher level supervisor or manager signature. Either the Annual Appraisal has not been approved, or the PDF file has not yet been uploaded, or no manager signature has been specified.

EDOCUMENT WEB FORM

Click the **Year** number link to access the “eDocument” detail page.

As previously noted, all blank columns to the right of the “Year” number indicate that the Annual Appraisal has been NOT been approved for review and is not available for signatures.

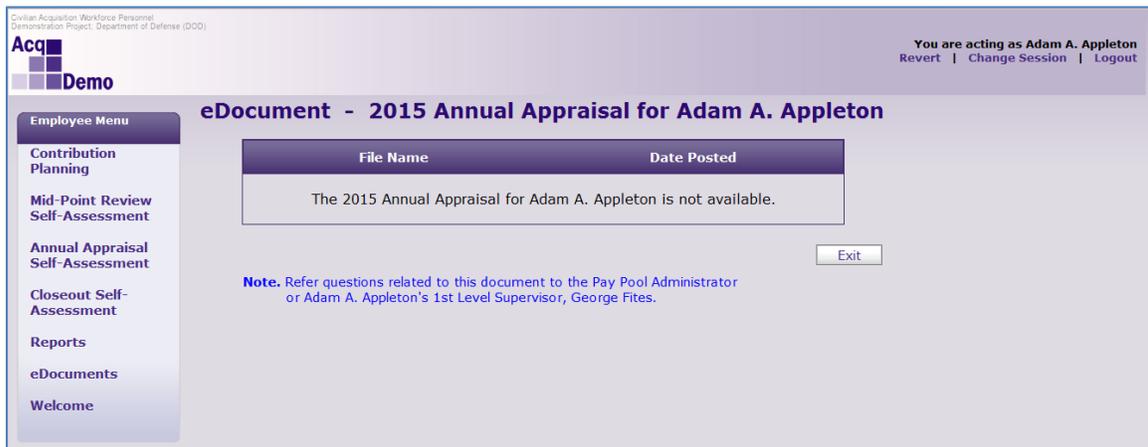


Figure 4-11: Employee eDocument Not Available

You will not be able to access the Annual Appraisal until it is approved for employee review.

Click a **Year** number link where the “eDocument Status” is incomplete (i.e. column contains a red “X”) and the “Employee Signature” is incomplete (column is blank or contains a red “X”) to review and sign the Annual Appraisal.

The red “X” in “eDocument Status” indicates the Annual Appraisal is ready for employee review. The “Employee Signature” incomplete status indicates that the employee signature is outstanding.

The following steps describe how to attach your signature to the approved Annual Appraisal.

1. Retrieve the active Annual Appraisal PDF file for digital signing.

You’ll need to get the latest Annual Appraisal to attach your signature. For the first person to sign, CAS2Net provides a report link to generate an unsigned report PDF file.

The screenshot shows the CAS2NET web application interface. At the top left, it says "Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)". The user is logged in as "Adam A. Appleton" and can "Revert", "Change Session", or "Logout". The page title is "eDocument - 2014 Annual Appraisal for Adam A. Appleton". On the left is an "Employee Menu" with options: Contribution Planning, Mid-Point Review Self-Assessment, Annual Appraisal Self-Assessment, Closeout Self-Assessment, Reports, eDocuments, and Welcome. The main content area has a table with columns "File Name" and "Date Posted". The table contains a message: "The 2014 Annual Appraisal for Adam A. Appleton has not yet been uploaded. To request a new document, click the CAS2Net report link: [Generate Adobe PDF File]. You will need to save the generated report file to your computer for signing and uploading to the CAS2Net Document Repository. To upload a signed document, use the browse button below to locate your saved document and click 'Upload File'." Below this is a "File to upload:" field with a "Browse..." button and an "Upload File" button. At the bottom right is an "Exit" button. A note at the bottom says: "Note. Refer questions related to this document to the Pay Pool Administrator or Adam A. Appleton's 1st Level Supervisor, George Fites."

Figure 4-12: Employee eDocument Generate PDF File

- Click the [**Generate Adobe PDF File**] link to produce an unsigned copy of the CAS2Net report “Appraisal Parts I,II, and III”.

When you click [**Generate Adobe PDF File**], CAS2Net creates the Annual Appraisal as an Adobe PDF file and displays it in a new window. Use the Adobe file save feature to store the document on your local drive.

CCAS SALARY APPRAISAL DOCUMENT FOR 2014			
Part I: CCAS Salary Appraisal Form			
Name:	Joe Contributor	Series:	0801
CAS2Net ID:	2711	Broadband Level:	III
Organization:	AMC/LHXTB	Retained Pay:	No
Career Path:	NH	Presumptive:	None
Appraisal Period:		From:	01-OCT-13
		To:	30-SEP-14
Approved By: Bob Arnold, Pay Pool Manager		Effective Date of Appraisal: January 1, 2015	
<p>Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.</p>			
_____		_____	
		Date	
_____		_____	
Supervisor Print / Sign		Date	
_____		_____	
Employee Print / Sign		Date	

Figure 4-13: Employee eDocument Save PDF File

Alternatively, when a previously signed copy of the Annual Appraisal has already been saved, you'll need to add your signature to same document. CAS2Net displays the "eDocument" web page with input controls to support this.

The "File Name" section provides a file name link to retrieve the saved Annual Appraisal for your signature along with input fields to later upload the signed PDF file.

The "Signatures" section displays signature information fields. "Employee" signature inputs are provided for you to record details and certify that the uploaded PDF file contains your signature (see signature steps later in this procedure). Previously completed supervisor or manager signature details are displayed in read-only mode.

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq
Demo

You are acting as Joe Contributor
Revert | Change Session | Logout

eDocument - 2014 Annual Appraisal for Joe Contributor

File Name	Date Posted
2014 Annual Appraisal for Joe Contributor.pdf	30-APR-2015 08:29:05 AM

Click the file name link to open the document. To save to your computer, right click the file name and choose "Save Target As..."

To upload a signed document, use the browse button below to locate your saved document and click "Upload File".

File to upload: Browse...

Signatures

Employee	Name	Date Signed	Signature Method
<input type="checkbox"/> Signature Certified Complete	Joe Contributor	04/29/2015	<input checked="" type="radio"/> Digital <input type="radio"/> Handwritten <input type="radio"/> Declined to Sign
<input checked="" type="checkbox"/> Signature Certified Complete	Margaret Manager	04/30/2015	<input checked="" type="radio"/> Digital

Note. Refer questions related to this document to the Pay Pool Administrator or Joe Contributor's 1st Level Supervisor, Margaret Manager.

Figure 4-14: Employee eDocument Download Previously Signed PDF File

- Right click the **File Name** and select option "Save Target As ..." to download and save the previously signed copy of the CAS2Net report "Appraisal Parts I,II, and III".
2. Use Adobe Pro to digitally sign the appraisal.
- Reference the appendix in the back of this user guide for guidance on using Adobe Pro products to digitally sign the Annual Appraisal.
- Appendix A – Digital Signatures Using Adobe X Pro.

Be sure to save the signed PDF file to your local hard drive!

3. Upload the signed PDF file.

After signing and saving the appraisal to your local hard drive, return to the eDocument update page.

- Use the “Browse” button to locate the saved PDF file.
- Click the “Upload File” button to add this file to the CAS2Net Document Repository.

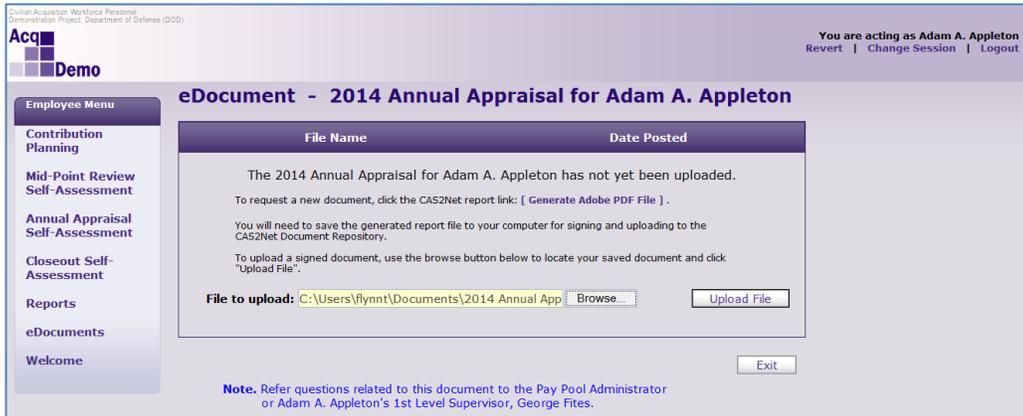


Figure 4-15: Employee eDocument File Upload

When **Upload File** is clicked, CAS2Net adds the appraisal to the database, displays the message “File upload successful”, and presents the **Signatures** section for you to identify whose signatures are attached.

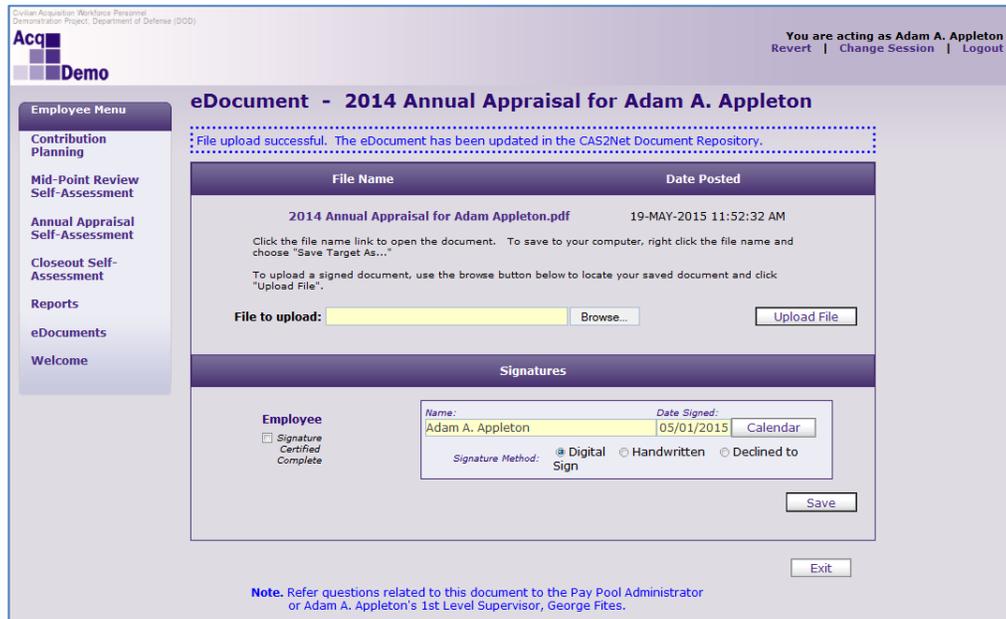


Figure 4-16: Employee eDocument Upload Successful

4. Certify your signature.

Finally, use the “Employee” signature input fields to inform CAS2Net that your signature is contained in the uploaded PDF file.

- You may change the pre-filled “Name” text field, if necessary, to match your signature.
- Use the “Calendar” button to select the “Date Signed” from the calendar pop-up window.
- Choose the applicable “Signature Method” radio button –

- “Digital” indicates you signed using Adobe Pro digital signature functionality.
- “Handwritten” indicates you manually signed a hard copy printout of the appraisal, scanned the paper document to a file on your local drive that you then uploaded to CAS2Net.

Support for handwritten signatures is provided for employees with no access digital signature hardware and/or software.

- “Declined to Sign” indicates you intentionally chose not to sign the Annual Appraisal and did not upload a PDF file containing your signature.
- Check the Employee “Signature Certified Complete” checkbox to certify that the uploaded PDF file contains the signature information described.
- Click “Save” to update the CAS2Net Document Repository database record.

CAS2Net displays the message “Signatures successfully updated” to indicate the database has been updated, and redisplay all the “eDocument” web page in read-only mode.

The screenshot shows the CAS2NET interface for updating an employee's eDocument signature. The page title is "eDocument - 2014 Annual Appraisal for Adam A. Appleton". A message at the top states "Signatures successfully updated." Below this is a table of documents:

File Name	Date Posted
2014 Annual Appraisal for Adam Appleton.pdf	19-MAY-2015 11:52:32 AM

Below the table is a section titled "Signatures" with the following details:

Employee	Name: Adam A. Appleton	Date Signed: 05/01/2015
<input checked="" type="checkbox"/> Signature Certified Complete	Signature Method: <input checked="" type="radio"/> Digital	

A note at the bottom of the page reads: "Note. Refer questions related to this document to the Pay Pool Administrator or Adam A. Appleton's 1st Level Supervisor, George Fites." An "Exit" button is located in the bottom right corner.

Figure 4-17: Employee eDocument Signature Updated

That’s it. The employee eDocument process is complete when the Annual Appraisal PDF file has been uploaded and employee signature details are certified complete.

At the bottom of the “eDocument” web page is a note indicating the 1st Level Supervisor for the selected appraisal cycle. Refer questions or problems related to the Annual Appraisal digital signature content or policy to the Pay Pool Administrator or the 1st Level Supervisor as noted.

The “Exit” button returns to the “eDocument Status” page with new status information.

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq
Demo

You are acting as Adam A. Appleton
Revert | Change Session | Logout

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Reports
- Closeout Self-Assessment
- eDocuments
- Welcome

eDocument Status - Annual Appraisal(s) for Adam A. Appleton

Year	eDocument Status	Employee Signature	Supervisor Signature	Manager Signature (Optional)
2015				
2014				

Key:

- Pending Final Approval. Employee Annual Appraisal document is not ready for signatures.
- (blank) Not Provided.
- Incomplete.
- Complete.

Figure 4-18: Employee eDocument Status Updated

The overall “eDocument Status” column contains a red “X” indicating that the Annual Appraisal is ready for employee review but required information is still incomplete. Since the “Employee Signature” and “Supervisor Signature” columns are non-blank, we know that an Annual Appraisal PDF file has been uploaded and one required signature is incomplete.

The “Employee Signature” column contains a green checkmark indicating the employee signature has been certified complete.

The “Supervisor Signature” column contains a red “X” indicating the 1st Level Supervisor signature is incomplete.

The “Manager Signature” column is blank indicating an optional higher level supervisor or manager has not been specified for this Annual Appraisal.

5. LEVEL 1 SUPERVISOR

This section focuses on the Level 1 Supervisor's use of the system and details how to use CAS2Net to rate and enter/edit performance factors in the Annual Appraisal. CAS2Net supports the Level 1 Supervisor's ability to create and modify performance ratings for each employee they supervise, which includes entering "Categorical" and "Numerical" ratings and recording supporting narrative comments.

The Level 1 Supervisor will have the following options appear in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, **Closeout Assessment**, **Welcome**, **Reports**, and **eDocuments**.

- The **Contribution Planning** option allows the supervisor to collaborate with employee to create or modify objectives for the current performance cycle.
- **Additional Feedback** allows the supervisor to provide helpful guidance throughout the performance cycle.
- **Mid-Point Review** enables the supervisor to assess employee performance at the mid-point of the annual the performance cycle.
- The **Annual Appraisal** allows the supervisor to document each employee's performance ratings and assessments with respect to the AcqDemo performance factor.
- **Closeout Assessment** is used to review employee performance for partial year position assignments.
- **Welcome** displays the CAS2Net welcome screen.
- The **Reports** option provides the capability to generate reports for each of the features above as well as Additional Feedback provided by the Level 1 Supervisor.
- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports for your subordinates. CAS2Net enables the Level 1 Supervisor to upload signed documents on behalf of others and make necessary corrections.

If the Level 1 Supervisor is also a "demo" employee, then the following "Employee Menu" options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, **Welcome**, **Reports**, and **eDocuments**.

Refer to Section "4. Employee" for information relating to the Employee Menu features.

5.1 Contribution Planning

Contribution Planning is a collaborative effort shared by the supervisor and the employee. Either party may initiate Contribution Planning if none exists. Either may update while status remains "In Progress". The supervisor is responsible for completing the process by entering the date and method of communication and clicking "Submit". If later modifications are necessary, it is the supervisor's responsibility to generate another Contribution Planning instance via the "Modify" feature.

It is important to note that Contribution Planning must be "submitted" to be accessible by other CAS2Net processes--such as Additional Feedback and Annual Appraisal. An entry that is "In Progress" is not visible outside Contribution Planning web form.

CONTRIBUTION PLANNING STATUS

When "Contribution Planning" is selected in the Supervisor I Menu, the "Contribution Planning Status" web page is displayed.

CAS2Net lists employees assigned to the supervisor along with Contribution Planning status columns:

- **Employee**
- **Employee Input** status—values include:
 - Green ‘checkmark’ = Employee has checked “Employee Narrative Complete” (Complete)
 - Red ‘X’ = Employee has saved input without checking “Employee Narrative Complete” (In Progress)
 - (blank) = Employee has NOT saved Contribution Planning input
- **Contribution Planning Status**—values include:
 - Green ‘checkmark’ = ‘Complete’
 - Red ‘X’ = ‘Incomplete’ (In Progress)
 - (blank) = Not Provided

The screenshot displays the 'Contribution Planning Status' page for the year 2015. It features a table with the following data:

Employee	Employee Input	Contribution Planning Status
Adam A. Appleton		
Bryce Butler		
Andrew Hoang		
Danielle Hoang		
Zack Zurbruggen		

Key:
 Contribution Planning Complete.
 Contribution Planning Incomplete.
 No Contribution Planning Provided.

Figure 5-1: Supervisor Contribution Planning Status

CONTRIBUTION PLANNING WEB FORM

On the Contribution Planning Status page, click an employee name to open the Contribution Planning web form.

CAS2Net populates the screen with last saved information for selected employee (if any).

The screenshot shows the 'Supervisor Contribution Planning' web form for employee Bryce Butler in 2015. The interface includes a top navigation bar with the user's name and session controls, a left-hand menu for navigation, and a main content area. The main area displays the employee's details: Broadband Level (IV), Occupational Series (25 - Park Ranger), Career Path (NH - Business Management And Technical Management Professional), and Expected OCS Range (88 - 92 - 95). The 'Contribution Planning Effective Date' is set to 10/01/2014, with a calendar control for October 2014. Below this, there are two large text input areas for 'Mandatory Objectives' and 'Individual Objectives'. At the bottom, there are sections for 'Method of Communication' (with radio buttons for Face to Face, TeleConference, Video Conference, Email, and Other) and 'Date Conducted' (with a calendar control for May 2015). The form also includes 'Save', 'Submit', and 'Exit' buttons at the bottom right.

Figure 5-2: Supervisor Contribution Planning Web Form

For your information, the Contribution Planning page displays the following employee attributes:

- First Level Supervisor Name
- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

The employee may or may not have initiated the Contribution Planning record. The supervisor may now enter or edit Contribution Planning fields as appropriate.

The “Contribution Planning Effective Date” defaults to the first day of the performance cycle—*e.g.* “10/01/2012” for fiscal year 2013. If necessary, use the calendar control to select appropriate dates.

Enter performance objectives into the “Contribution Planning ‘In Progress’” textbox.

Click “Save” to save changes and refresh the web page.

Click “Exit” to return to the Contribution Planning Status web page without saving changes.

After the supervisor meets with the employee to review the “Contribution Planning” content, the supervisor selects the date and method of communication and clicks “Submit” indicating the “Contribution Planning” process is complete.

“Submit” saves changes and returns to the Contribution Planning Status page.

Note: The “Submit” button is disabled until the date conducted is selected. Once the date is selected, the “Submit” button becomes active.

Once the record has been submitted, no further changes are permitted.

MODIFY CONTRIBUTION PLANNING

If later modifications to a plan are needed, click on the Contribution Planning from the Supervisor Menu and select the name of the employee to open the Contribution Planning web form for selected employee.

The “Contribution Planning” input text box is pre-filled with last saved or submitted content.

Hot links provide “read only” access to previously submitted “Contribution Planning” content.

The supervisor may click the “Modify” button to initiate modifications to Contribution Planning for this employee. CAS2Net reopens the Contribution Planning input for editing pre-filled with the original content. The “Employee Input” status is unchanged by the “Modify” request. Note that the new record will not be added to the CAS2Net database until the supervisor clicks “Save” or

The screenshot displays the 'Contribution Planning for Adam A. Appleton' web form. At the top, it shows the user is acting as George Fites. The form includes a sidebar with 'Employee Menu' and 'Supervisor I Menu'. The main content area shows the employee's details: Broadband Level (III), Occupational Series (1550 - Computer Science), Career Path (NH - Business Management And Technical Management Professional), and Expected OCS Range (66 - 69 - 73). It also lists previous contribution planning records with their effective dates and times. The 'Mandatory Objectives' section contains the text 'None'. The 'Individual Objectives' section contains the text: 'This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.' At the bottom, there are fields for 'Method of Communication' (with radio buttons for Face to Face, TeleConference, Video Conference, Email, and Other) and 'Date Conducted' (05/07/2015). A 'Modify' button is located at the bottom right. A note at the bottom states: 'Note. The supervisor has posted the closing employee review date; this record is read only.'

“Submit”.

Figure 5-3: “Modify” Contribution Planning

Note. The caption “active” appears next to the last saved Contribution Planning entry label or “hot link” to highlight the version that is current.

Change text as necessary and click “Save”. At this point, this new instance of Contribution Planning is added to the CAS2Net database which is again editable by either the supervisor or the employee.

When complete and reviewed with the employee, select method of date and communication and click “Submit”.

NEXT CYCLE YEAR CONTRIBUTION PLANNING

CAS2Net is focused on annual appraisals and pay pool operations at the same time that new Contribution Planning is being documented for the next performance year. To accommodate business cycle overlap, CAS2Net allows supervisors to choose between the previous and next cycle years.

The “Year” dropdown displayed on each Contribution Planning web page provides access to the current year, the prior year and the next year.

Select the next year from the “Year” dropdown to input Contribution Planning for the coming year.

The screenshot displays the 'Contribution Planning for Adam A. Appleton' web form. At the top, it shows the user is acting as George Fites. The form is for the year 2016, with the first level supervisor being George Fites. Key details include: Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, and Expected OCS Range: TBD. The Contribution Planning Effective Date is set to 10/01/2015. A calendar for October 2015 is shown with the 1st highlighted. The 'Mandatory Objectives' section contains the text 'None'. The 'Individual Objectives' section has a placeholder text: 'This is the employee's next cycle Contribution Planning segment. This is the supervisor's next cycle Contribution Planning segment.' At the bottom, the 'Method of Communication' section has radio buttons for Face to Face, TeleConference, Video Conference, Email, and Other. A calendar for May 2015 is also present with the 8th highlighted. Buttons for Save, Submit, and Exit are at the bottom right.

Figure 5-4: “Next Cycle Year” Supervisor Contribution Planning Web Form

The capability to create “next cycle year” Contribution Planning as well as “active appraisal cycle” Contribution Planning makes it imperative that supervisors correctly select the appropriate year from

the dropdown provided at the top center of the Contribution Planning screen in creating a plan for either year.

Notes.

1. The “Character Count” shown on the right just above the Contribution Planning textbox shows the actual number of characters entered.

When the 6000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.
2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state.

Employee input status “In Progress” does not prevent the supervisor from submitting the Contribution Planning as “complete”.
3. When **any** factor score is saved in the Annual Appraisal, in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.
4. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.2 Additional Feedback

Additional Feedback may be created by the supervisor at any time throughout the period of performance to provide guidance and feedback to an employee. The web page is only visible to the Level 1 Supervisor but the employee can print the content when and if the supervisor has saved a checkmark in “Release Employee Report” or has submitted the Additional Feedback.

The supervisor can create multiple instances of Additional Feedback using the “Create” feature.

ADDITIONAL FEEDBACK STATUS

When “Additional Feedback” is selected in the Supervisor I Menu, the “Additional Feedback Status” web page is displayed.

The screenshot shows the 'Additional Feedback Status' page for the year 2015. The page includes a navigation menu on the left and a table of employees with their feedback status. The table is as follows:

Employee	Additional Feedback Status
Adam A. Appleton	
Bryce Butler	
Andrew Hoang	
Danielle Hoang	
Zack Zurbruggen	

Key:
 Additional Feedback Complete.
 Additional Feedback Incomplete.
 No Additional Feedback Provided.

Figure 5-5: Supervisor Additional Feedback Status

CAS2Net lists employees assigned to the supervisor along with Additional Feedback status columns:

- **Employee**
- **Additional Feedback Status**—values include:
 - Green ‘checkmark’ = ‘Complete’
 - Red ‘X’ = ‘Incomplete’ (In Progress)
 - (blank) = Not Provided

ADDITIONAL FEEDBACK WEB FORM

On the Additional Feedback Status page, click an employee name to open the Additional Feedback web form.

The screenshot shows the 'Additional Feedback for Adam A. Appleton' web form. At the top, it indicates the user is acting as George Fites. The form is for the year 2015, as of 05/08/2015 14:07. It includes a warning: 'DO NOT USE FOR MID-POINT REVIEW FEEDBACK'. The employee's first level supervisor is George Fites. Key details include: Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, and Expected OCS Range: 66 - 69 - 73. The form contains several sections for input: 'Contribution Planning - Effective 01OCT14: Mandatory Objectives' (text area), 'Individual Objectives' (text area with instructions), 'Overall Supervisor Feedback' (text area, 4000 characters), and 'Problem Solving' (text area, 4000 characters). A navigation bar at the bottom allows switching between assessment categories: Problem Solving, Teamwork / Cooperation, Customer Relations, Leadership / Supervision, Communication, Resource Management, and Employee Review Date. The 'Problem Solving' category is currently selected. At the bottom, there is a 'Release Employee Report' checkbox and 'Save', 'Submit', and 'Exit' buttons. The session is active as of 08 MAY 2015 14:08:17.

Figure 5-6: “Create” Additional Feedback

CAS2Net populates the screen with last saved information (if any) for the selected employee. Form content includes:

- “As of” subtitle identifies the Additional Feedback by its last saved date and time. The default for a “new” entry is the current date and time.

- Advisory text “DO NOT USE FOR MID-POINT REVIEW FEEDBACK’ emphasizes proper use.
- Employee attribute subtitle:
 - First Level Supervisor Name
 - Broadband Level
 - Occupational Series
 - Career Path
 - Expected OCS Range
- “Contribution Planning” ‘read only’ textbox contains the last submitted information. The Contribution Planning “Effective Date” is included in the subtitle.
- “Overall Supervisor Feedback” textbox
(Tabs by CAS2Net Performance Factor)
 - Factor name subtitle => hot link to “Descriptors and Discriminators” page
 - “Supervisor Assessment” textbox
(Tab for Employee Review Date)
 - Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
 - “Other” method of communication text.
 - Date Conducted
 - Date Conducted calendar control.
- (Status checkbox and action buttons)
 - “Release Employee Report” checkbox
 - “Save”, “Submit”, and “Exit” buttons

Enter assessment content into the “Overall Supervisor Feedback” textbox or into one or more “Supervisor Assessment” textboxes provided with performance factor tabs. Note that the factor name on each factor tab is a “hot link” to corresponding “Descriptors and Discriminators” for that factor.

Optionally, check the “Release Employee Report” button to allow the employee to print the “Additional Feedback Report” while the entry is “In Progress”.

Note: “Release Employee Report” is disabled before text is typed into any assessment textbox.

Click “Save” to save changes and refresh the web page.

Click “Exit” to return to the Additional Feedback Status page without saving changes.

After meeting with the employee to review the “Additional Feedback” content, select the date and method of communication and click “Submit” to indicate that the “Additional Feedback” process is complete.

“Submit” saves changes and returns to the Additional Feedback Status page.

Note (1). The “Submit” button is disabled until the date is selected. Once the date is selected, the “Submit” button becomes active and the “Release Employee Report” button is disabled.

Note (2). “Release Employee Report” checkbox is automatically set when the Additional Feedback is submitted.

CREATE ADDITIONAL FEEDBACK

To create another instance of Additional Feedback, click “Additional Feedback” in the Supervisor Menu and select the name of the employee to open the Additional Feedback web form for selected employee.

The “Contribution Planning” input text box is pre-filled with last submitted content. The Contribution Planning “Effective Date” is included in the subtitle.

Hot links provide “read only” access to previously submitted Additional Feedback and the Mid-Point Review records.

The supervisor may click the “Create” button to open a new Additional Feedback record for this employee

The screenshot displays the 'Additional Feedback for Adam A. Appleton' web form. At the top, it shows the user is acting as George Fites. The form includes a navigation menu on the left with options like 'Contribution Planning', 'Mid-Point Review', and 'Additional Feedback'. The main content area features a header with the employee name and a dropdown for the year (2015). Below this, there are fields for 'Broadband Level' (III), 'Occupational Series' (1550 - Computer Science), 'Career Path' (NH - Business Management And Technical Management Professional), and 'Expected OCS Range' (66 - 69 - 73). The form is divided into several sections: 'Mandatory Objectives' (containing 'None'), 'Individual Objectives' (pre-filled with text), 'Overall Supervisor Feedback' (pre-filled with text), and a 'Problem Solving' section with a 'Supervisor Assessment' text box. A 'Create' button is located at the bottom right of the form.

Figure 5-7: “Create” Additional Feedback

When “Create” is clicked, CAS2Net opens a clean Additional Feedback web form. Note that the new record is not added to the CAS2Net database until the supervisor clicks “Save” or “Submit”.

Enter the Additional Feedback text; check “Release Employee Report” to allow the employee to print the new Additional Feedback content and click “Save”.

When Additional Feedback input is complete and reviewed with the employee, access the “Employee Review Date” tab to select method of date and communication and click “Submit”.

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.
2. When **any** factor score is saved in the Annual Appraisal, in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.
3. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.3 Mid-Point Review

The Mid-Point Review enables the supervisor to assess employee performance at the mid-point of the annual the performance cycle. The web page is only visible to the Level 1 Supervisor but the employee can print the content when and if the supervisor has saved a checkmark in “Release Employee Report” or has submitted the Mid-Point Review.

MID-POINT REVIEW STATUS

When “Mid-Point Review” is selected in the Supervisor I Menu, the “Mid-Point Review Status” web page is displayed.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as George Fites
Revert | Change Session | Logout

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

Mid-Point Review Status

Year: 2015

Employee	Self-Assessment	Mid-Point Review Status
Adam A. Appleton		
Bryce Butler		
Andrew Hoang		
Danielle Hoang		
Zack Zurbruggen		

Key:

- Mid-Point Review Complete.
- Mid-Point Review Incomplete.
- (blank) No Mid-Point Review Provided.

Figure 5-8: Supervisor Mid-Point Review Status

CAS2Net lists employees assigned to the supervisor along with Mid-Point Review status columns:

- **Employee**
- **Self-Assessment** status—values include:
 - Green ‘checkmark’ = Employee has checked “Employee Narrative Complete” (Complete)
 - Red ‘X’ = Employee has saved input without checking “Employee Narrative Complete” (In Progress)
 - (blank) = Employee has NOT saved the Mid-Point Review Self-Assessment
- **Mid-Point Review Status**—values include:
 - Green ‘checkmark’ = ‘Complete’
 - Red ‘X’ = ‘Incomplete’ (In Progress)
 - (blank) = Not Provided

MID-POINT REVIEW WEB FORM

On the Mid-Point Review Status page, click an employee name to open the Mid-Point Review web form.

The screenshot shows a web application interface for a Mid-Point Review. At the top left, it says 'Acq Demo' and 'Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOC)'. At the top right, it says 'You are acting as George Fites' with links for 'Revert', 'Change Session', and 'Logout'. The main title is 'Mid-Point Review for Adam A. Appleton' with a 'Year: 2015' dropdown. Below this, it lists 'First Level Supervisor: George Fites', 'Broadband Level: III', 'Occupational Series: 1550 - Computer Science', 'Career Path: NH - Business Management And Technical Management Professional', and 'Expected OCS Range: 66 - 69 - 73'. There are two large text areas for 'Mandatory Objectives' (containing 'None') and 'Individual Objectives' (containing a placeholder text). Below these is a section for 'Additional Feedback as of 05/08/2015 14:13 (Conducted 05/08/2015)'. A navigation bar includes 'Problem Solving', 'Teamwork / Cooperation', 'Customer Relations', 'Leadership / Supervision', 'Communication', 'Resource Management', and 'Employee Review Date'. The 'Problem Solving' section has an 'Employee Self-Assessment' text area and a 'Supervisor Assessment' text area with a character count '(Characters used: 0 of 4000)'. At the bottom, there are checkboxes for 'Release Employee Report' and 'Lock Employee Self-Assessment', and 'Save', 'Submit', and 'Exit' buttons. The session is active on 08 MAY 2015 14:21:22.

Figure 5-9: Supervisor Mid-Point Review Web Form

CAS2Net populates the screen with last saved information for selected employee (if any). Form content includes:

- Mid-Point Review “Year”
- Employee attribute subtitle:
 - First Level Supervisor Name
 - Broadband Level
 - Occupational Series
 - Career Path
 - Expected OCS Range

- Conditional advisory message to alert the supervisor that the employee's Mid-Point Review Self-Assessment is incomplete.
- "Contribution Planning" 'read only' textbox contains the last submitted information. The Contribution Planning "Effective Date" is included in the subtitle.

(Tabs by CAS2Net Performance Factor)

- Factor name subtitle => hot link to "Descriptors and Discriminators" page
- "Employee Self-Assessment" 'read only' textbox
- "Supervisor Assessment" textbox

(Tab for Employee Review Date)

- Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
- "Other" method of communication text.
- Date Conducted
- Date Conducted calendar control.

(Status checkbox and action buttons)

- "Release Employee Report" checkbox
- "Lock Employee Self-Assessment" checkbox
- "Save", "Submit", and "Exit" buttons

Enter assessment content into "Supervisor Assessment" textboxes provided with performance factor tabs. Note that the factor name on each factor tab is a "hot link" to corresponding "Descriptors and Discriminators" for that factor.

Optionally, check the "Release Employee Report" checkbox to allow the employee to print the "Mid-Point Review Report" while the entry is "In Progress".

Note: "Release Employee Report" is disabled before text is typed into any assessment textbox.

Optionally, uncheck the "Lock Employee Self-Assessment" to enable the employee to update his self-assessment record when the supervisor saves the Mid-Point Review.

Note: "Lock Employee Self-Assessment" defaults to "checked" in keeping with PMO policy that the self-assessment should not change when the supervisor begins work on the Mid-Point Review. Once saved, the "checked" or "unchecked" value persists until changed by the supervisor.

Click "Save" to save changes and refresh the web page.

Click "Exit" to return to the Mid-Point Review Status page without saving changes.

After meeting with the employee to go over the "Mid-Point Review" content, select the date and method of communication and click "Submit" to indicate that the "Mid-Point Review" process is complete.

"Submit" saves changes and returns to the Mid-Point Review Status page.

Note (1). The "Submit" button is disabled until the date is selected. Once the date is selected, the "Submit" button becomes active and the "Release Employee Report" checkbox is disabled.

Note (2). "Release Employee Report" and "Lock Employee Self-Assessment" checkboxes are automatically set when the Mid-Point Review is submitted.

REOPEN MID-POINT REVIEW

To reopen the Mid-Point Review for modifications or corrections, click “Mid-Point Review” in the Supervisor Menu and select the name of the employee to open the Mid-Point Review web form for the selected employee.

Select the “Employee Review Date” tab and click the “Reopen” button. CAS2Net immediately clears the employee review date and method of communication to revert the Mid-Point Review status back to “In Progress”.

Optionally uncheck “Lock Employee Self-Assessment” and click “Save” to enable the employee to update the Mid-Point Review Self-Assessment.

Follow steps previously described in sub-section “Mid-Point Review Web Form” to edit and submit changes.

The screenshot displays the 'Mid-Point Review for Adam A. Appleton' web form. At the top, it identifies the user as 'George Fites' and provides navigation links for 'Revert', 'Change Session', and 'Logout'. The form is divided into several sections:

- Employee Menu:** Includes Contribution Planning, Mid-Point Review Self-Assessment, Annual Appraisal Self-Assessment, Closeout Self-Assessment, Reports, and eDocuments.
- Supervisor I Menu:** Includes Contribution Planning, Additional Feedback, Mid-Point Review, Annual Appraisal, Closeout Assessment, Welcome, Reports, and eDocuments.
- Employee Information:** Year: 2015, First Level Supervisor: George Fites, Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, Expected OCS Range: 66 - 69 - 73.
- Contribution Planning - Effective 01OCT14:**
 - Mandatory Objectives:** None
 - Individual Objectives:** This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.
- Additional Feedback:** as of 05/08/2015 14:13 (Conducted 05/08/2015)
- Method of Communication:**
 - Face to Face
 - TeleConference
 - Video Conference
 - Email
 - Other
- Date Conducted:** 05/08/2015
- Buttons:** Reopen, Exit
- Checkboxes:** Release Employee Report, Lock Employee Self-Assessment
- Note:** The supervisor has posted the closing employee review date; this record is read only.

Figure 5-10: “Reopen” Mid-Point Review

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state.

Employee input status “In Progress” does not prevent the supervisor from saving information into the Mid-Point Review.

3. The employee’s Mid-Point Review Self-Assessment is displayed as “read only” when the supervisor has saved the Mid-Point Review with a checkmark in “Lock Employee Self-Assessment”.

4. When **any** factor score is saved in the Annual Appraisal, in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.

5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

6. When the “Reopen” button is clicked, the Mid-Point Review status reverts to “In Progress” with the following normal—but possibly unintended—consequences:

- Contribution Planning text and effective date are refreshed to capture recently “submitted” information.
- The 1st Level Supervisor who last saves the Mid-Point Review is the supervisor-of-record for reporting purposes. Earlier supervisor information may be overlaid by the “reopen” process.

5.4 Annual Appraisal

The Annual Appraisal allows the supervisor to document each employee’s performance ratings and assessments with respect to the AcqDemo performance factor.

ANNUAL APPRAISAL STATUS

When “Annual Appraisal” is selected in the Supervisor I Menu, CAS2Net displays the “Annual Appraisal Status” page. “Annual Appraisal Status” lists employees to be assessed by the supervisor along with status information:

- Employee
- Self-Assessment status
- Supervisor Narrative status
- Categorical Status
- Numerical Status
- Presumptive Status

Status values include:

- Green checkmark = ‘Complete’
- Red ‘X’ = ‘Incomplete’ (In progress)
- (blank) = ‘Not Provided’

Note: “Self-Assessment” status indicates whether the employee has checked “Employee Narrative Complete”. “Supervisor Narrative” status indicates that the supervisor has checked “Supervisor Narrative Complete” on the Annual Appraisal. Both checkboxes are information only; CAS2Net does not enforce any business rules regarding narrative status values.

Employee	Self-Assessment	Supervisor Narrative	Categorical Status	Numerical Status	Employee Review	Presumptive Status
Adam A. Appleton						None
Bryce Butler						None
Andrew Hoang						None
Danielle Hoang						None
Zack Zurbruggen						None

Key:
 Annual Appraisal Complete.
 Annual Appraisal Incomplete.
 (blank) No Annual Appraisal Provided.

Figure 5-11: Annual Appraisal Status

ANNUAL APPRAISAL WEB FORM

Click the employee name to open the Annual Appraisal web page. CAS2Net presents the Annual Appraisal page prepopulated with the selected employee data and rating factors.

Annual Appraisal web page includes:

- Employee attribute subtitle:
 - Broadband Level
 - Occupational Series
 - Career Path
 - Expected OCS Range
 - Actual OCS
- Conditional advisory message to alert the supervisor that the employee's Annual Appraisal Self-Assessment is incomplete.
- "Contribution Planning" 'read only' textbox contains the last submitted information. The Contribution Planning "Effective Date" is included in the subtitle.
- "Hot links" to access "current year" Additional Feedback, Mid-Point Review and Closeout Assessment records (if available).
- Tabs by rating factor: Problem Solving, Teamwork/Cooperation, Customer Relations, Leadership/Supervision, Communication, Resource Management.
(Each factor includes)
 - "Descriptors and Discriminators" link.
 - Employee Self-Assessment 'read only' textbox.
 - Factor weight.
 - Categorical score dropdown list.
 - Numerical score dropdown list.
 - Supervisor comment text box.
- (Tab for Employee Review Date)
 - Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
 - "Other" method of communication text.
 - Date Conducted
 - Date Conducted calendar control.
- (Status checkbox and action buttons)
 - "Supervisor Narrative Complete" checkbox
 - "Lock Employee Self-Assessment" checkbox
 - "Save" and "Exit" buttons

The screenshot shows the 'Annual Appraisal for Adam A. Appleton' web form for the year 2015. At the top, it displays the user's name and session information. The main header includes the employee's name and the year. Below this, a table lists key attributes: Broadband Level (III), Occupational Series (1550 - Computer Science), Career Path (NH - Business Management And Technical Management Professional), Expected OCS Range (66 - 69 - 73), and Actual OCS (N/A). The form is divided into several sections: 'Mandatory Objectives' (currently empty), 'Individual Objectives' (with a placeholder text), and a 'Problem Solving' section. The 'Problem Solving' section has a tabbed interface with 'Problem Solving' selected. It contains an 'Employee Self-Assessment' text box, a 'Supervisor Assessment' text box, and dropdown menus for 'Factor Weight' (set to 1.0), 'Categorical' (set to Unrated), and 'Numeric' (set to Unrated). At the bottom, there are checkboxes for 'Supervisor Narrative Is Complete' and 'Lock Employee Self-Assessment', along with 'Save' and 'Exit' buttons. A note at the bottom states: 'Note. Employee Review Date is not editable until Pay Pool AMC/LH has been certified.'

Figure 5-12: Annual Appraisal Web Form

1. One by one, click each performance factor to:
 - Enter comments to the Supervisor Assessment text box.
 - Assign Categorical score by selecting score from the “Categorical” dropdown list.
 - Assign Numerical score by selecting the correlated scores with selected “Categorical” rating in “Numerical” dropdown list.
2. When every factor has been assigned a “Numeric” score, CAS2Net calculates and displays the Actual OCS in rightmost portion of the employee attribute subtitle. When any numeric factor score is missing, CAS2Net shows the Actual OCS as “N/A”.
3. Check the “Supervisor Narrative Complete” checkbox when all assessments are entered and complete.
4. Optionally, uncheck the “Lock Employee Self-Assessment” to enable the employee to update his self-assessment record when the supervisor saves the Annual Appraisal.

Note: “Lock Employee Self-Assessment” defaults to “checked” in keeping with PMO policy that the self-assessment should not change when the supervisor begins work on the Annual Appraisal. Once saved, the “checked” or “unchecked” value persists until changed by the supervisor.

5. Click the “Save” button to save the appraisal. When “Save” is clicked, CAS2Net saves the content and displays message “Save Successful”.
6. Click the “Exit” button to go back to “Annual Appraisal Status” page. If “Exit” is clicked before “Save”, CAS2Net does not save the changes and returns to the “Annual Appraisal Status” page.
7. As the rating supervisor, you can go back to edit/change the appraisal and save it over and over.

ANNUAL APPRAISAL - EMPLOYEE REVIEW TAB

After the pay pool is certified and the supervisor has reviewed the Annual Appraisal with the employee, the supervisor should access the Annual Appraisal “Employee Review Date” tab to enter the date and method of communication.

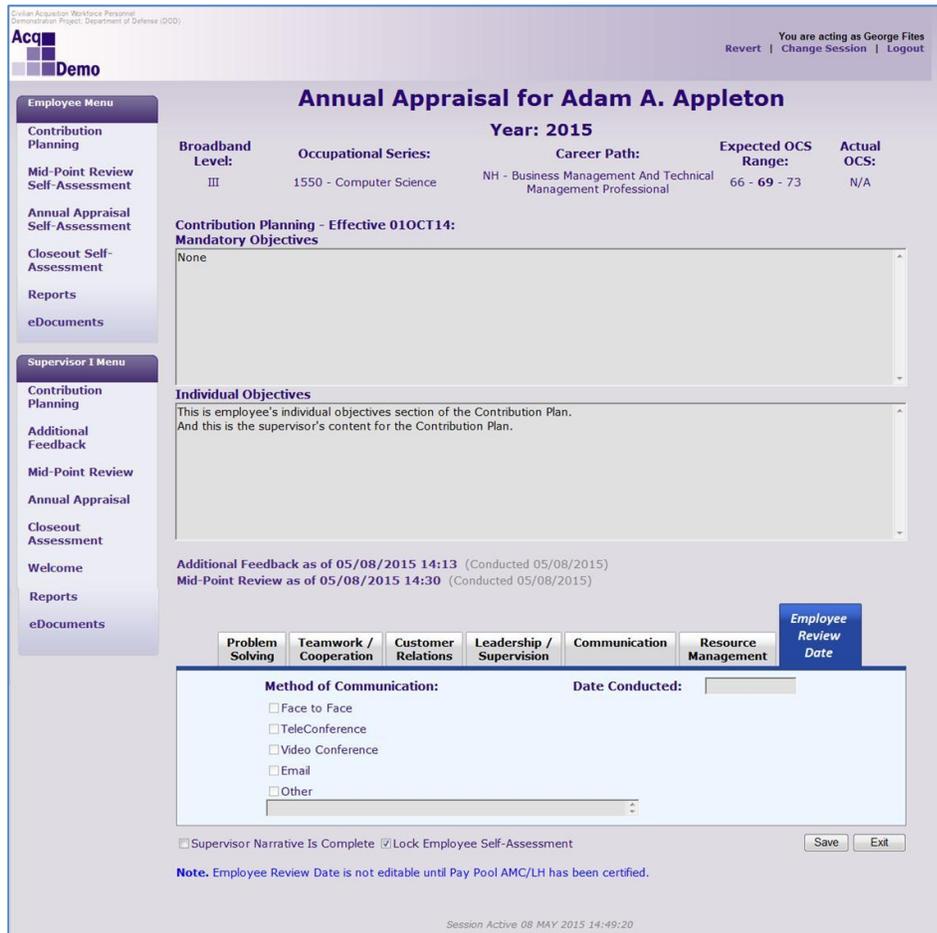


Figure 5-13: Annual Appraisal “Employee Review Date” Tab

Notes.

1. CAS2Net treats “Categorical” scores as optional since they may not be required by all AcqDemo components. Changing a “Categorical” score to “Unrated” does not affect the corresponding “Numerical” score. Changing “Categorical” to a different rating value causes the corresponding “Numerical” score to revert to “Unrated”.
2. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.
3. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the self-assessment “Employee Narrative Complete” state.

Employee input status “In Progress” does not prevent the supervisor from saving information in the Annual Appraisal.
4. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.
5. To enable changes to “current year” Contribution Planning, Additional Feedback, Mid-Point Review or Closeout Assessment records, the supervisor can reset all scores (Categorical and Numerical) to “Unrated”, then click “Save”.
6. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.5 Closeout Assessment

CAS2Net supports one or more Closeout Assessments for an employee during a performance cycle to evaluate employee performance for partial year position assignments. Either the employee or the supervisor can initiate the Closeout process.

CLOSEOUT ASSESSMENT STATUS

When “Closeout Assessment” is selected in the Supervisor I Menu, the “Closeout Assessment Status” web page is displayed.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

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Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

Closeout Assessment Status

Year: **2015** ▾

Employee	Closeout Period	Self-Assessment	Closeout Assessment Status
Adam A. Appleton	01 OCT - 08 MAY		
	New		
Bryce Butler	New		
Andrew Hoang	New		
Danielle Hoang	New		
Zack Zurbruggen	New		

Key:

- Closeout Assessment Complete.
- Closeout Assessment Incomplete.
- (blank) No Closeout Assessment Provided.

Figure 5-14: Supervisor Closeout Assessment Status

CAS2Net lists employees assigned to the supervisor along with Closeout Assessment status columns:

- **Employee**—Name of each employee assigned the selected cycle year
- **Closeout Period**—Start and end dates of existing Closeout Assessment record(s); “New” provides access to an empty web form for defining a new Closeout period.
- **Self-Assessment**—status values include:
 - Green ‘checkmark’ = ‘Complete’; Employee saved checked “Employee Narrative Complete”
 - Red ‘X’ = ‘Incomplete’ (In Progress); Employee saved blank “Employee Narrative Complete”
 - (blank) = Not Provided; Employee has NOT saved the “Closeout Self-Assessment”
- **Closeout Assessment Status**—values indicating supervisor status include:

- Green ‘checkmark’ = ‘Closeout Assessment Complete’
- Red ‘X’ = ‘Incomplete’ (In Progress)
- (blank) = Not Provided

CLOSEOUT ASSESSMENT WEB FORM

Click a specific date range under Closeout Period to update the Closeout Assessment for an existing Closeout period –or–click “New” initiate the Closeout Assessment for a new Closeout Period.

CAS2Net refreshes the screen to display the “Closeout Assessment” web form with the last saved information for selected employee (if any). Form content includes:

- Closeout Assessment “Year”
- Employee attribute subtitle:
 - First Level Supervisor Name
 - Broadband Level
 - Occupational Series
 - Career Path
 - Expected OCS Range
- Conditional advisory message to alert the supervisor that the employee’s Closeout Self-Assessment is incomplete.
- Closeout Period details:
 - “Start Date”
 - “End Date”
 - “Reason for Closeout Assessment”
- “Contribution Planning” ‘read only’ textbox contains the last submitted information. The Contribution Planning “Effective Date” is included in the subtitle.
- “Hot links” to access “current year” Additional Feedback, Mid-Point Review and previous Closeout Assessment records (if available).
- “Overall Employee Self-Assessment” ‘read only’ textbox
- “Overall Supervisor Feedback” textbox
(Tabs by CAS2Net Performance Factor)
 - Factor name subtitle => hot link to “Descriptors and Discriminators” page
 - “Employee Self-Assessment” ‘read only’ textbox
 - “Supervisor Assessment” textbox
- (Tab for Employee Review Date)
 - Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
 - “Other” method of communication text.
 - Date Conducted
 - Date Conducted calendar control.
- (Status checkbox and action buttons)
 - “Release Employee Report” checkbox
 - “Lock Employee Self-Assessment” checkbox

- “Save”, “Submit”, and “Exit” buttons

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

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Acc Demo

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

Closeout Assessment for Adam A. Appleton

Year: **2015**

First Level Supervisor: George Fites

Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management And Technical Management Professional
Start Date: 10/1/2014		End Date: 5/8/2015

April 2015							May 2015						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	1	2
5	6	7	8	9	10	11	3	4	5	6	7	8	9
12	13	14	15	16	17	18	10	11	12	13	14	15	16
19	20	21	22	23	24	25	17	18	19	20	21	22	23
26	27	28	29	30	1	2	24	25	26	27	28	29	30
3	4	5	6	7	8	9	31	1	2	3	4	5	6

Reason for Closeout Assessment:

Contribution Planning - Effective 01OCT14:

Mandatory Objectives

Individual Objectives

This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.

Additional Feedback as of 05/08/2015 14:13 (Conducted 05/08/2015)
Mid-Point Review as of 05/08/2015 14:30 (Conducted 05/08/2015)

Overall Employee Self-Assessment:

This is the employee's overall self-assessment for the closeout period ending May 8, 2015.

Overall Supervisor Assessment: (Characters used: 0 of 4000)

Problem Solving

Teamwork / Cooperation

Customer Relations

Leadership / Supervision

Communication

Resource Management

Employee Review Date

Problem Solving

Employee Self-Assessment:

This is the employee's Problem Solving self-assessment for the closeout period ending May 8, 2015.

Supervisor Assessment: (Characters used: 0 of 4000)

Release Employee Report
 Lock Employee Self-Assessment

Session Inactive 08 MAY 2015 15:02:14 (1)

Figure 5-15: Supervisor Closeout Assessment Web Form

Enter assessment content into “Overall Supervisor Assessment” and “Supervisor Assessment” textboxes provided with performance factor tabs. Note that the factor name on each factor tab is a “hot link” to corresponding “Descriptors and Discriminators” for that factor.

Optionally, check the “Release Employee Report” checkbox to allow the employee to print the “Closeout Assessment Report” while the entry is “In Progress”.

Note: “Release Employee Report” is disabled before text is typed into any assessment textbox.

Optionally, uncheck the “Lock Employee Self-Assessment” to enable the employee to update his self-assessment record when the supervisor saves the Closeout Assessment.

Note: “Lock Employee Self-Assessment” defaults to “checked” in keeping with PMO policy that the self-assessment should not change when the supervisor begins work on the Closeout Assessment. Once saved, the “checked” or “unchecked” value persists until changed by the supervisor.

Click “Save” to save changes and refresh the web page.

Click “Exit” to return to the Closeout Assessment Status page without saving changes.

After meeting with the employee to go over the Closeout Assessment content, select the date and method of communication and click “Submit” to indicate that the Closeout Assessment process is complete.

“Submit” saves changes and returns to the Closeout Assessment Status page.

Note (1). The “Submit” button is disabled until the date is selected. Once the date is selected, the “Submit” button becomes active and the “Release Employee Report” checkbox is disabled.

Note (2). “Release Employee Report” and “Lock Employee Self-Assessment” checkboxes are automatically set when the Closeout Assessment is submitted.

REOPEN CLOSEOUT ASSESSMENT

To reopen the Closeout Assessment for modifications or corrections, click “Closeout Assessment” in the Supervisor Menu and select the employee’s Closeout Period date range to open the Closeout Assessment web form.

Select the “Employee Review Date” tab and click the “Reopen” button. CAS2Net immediately clears the employee review date and method of communication to revert the Closeout Assessment status back to “In Progress”.

Optionally uncheck “Lock Employee Self-Assessment” and click “Save” to enable the employee to update the Mid-Point Review Self-Assessment.

Follow steps previously described in sub-section “Closeout Assessment Web Form” to edit and submit changes.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DCO)

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Acq Demo

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

Closeout Assessment for Adam A. Appleton

Year: **2015**

First Level Supervisor: George Fites

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
III	1550 - Computer Science	NH - Business Management And Technical Management Professional	66 - 69 - 73

Reopen Successful

Start Date: End Date:

April 2015							May 2015						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	1	2
5	6	7	8	9	10	11	3	4	5	6	7	8	9
12	13	14	15	16	17	18	10	11	12	13	14	15	16
19	20	21	22	23	24	25	17	18	19	20	21	22	23
26	27	28	29	30	1	2	24	25	26	27	28	29	30
3	4	5	6	7	8	9	31	1	2	3	4	5	6

Reason for Closeout Assessment:

Contribution Planning - Effective 01OCT14:
Mandatory Objectives
 None

Individual Objectives
 This is employee's individual objectives section of the Contribution Plan.
 And this is the supervisor's content for the Contribution Plan.

Additional Feedback as of 05/08/2015 14:13 (Conducted 05/08/2015)
 Mid-Point Review as of 05/08/2015 14:30 (Conducted 05/08/2015)

Overall Employee Self-Assessment:
 This is the employee's overall self-assessment for the closeout period ending May 8, 2015.

Overall Supervisor Assessment: (Characters used: 91 of 4000)
 This is supervisor's overall assessment for the closeout period ending May 8, 2015.

Problem Solving	Teamwork / Cooperation	Customer Relations	Leadership / Supervision	Communication	Resource Management	Employee Review Date
-----------------	------------------------	--------------------	--------------------------	---------------	---------------------	----------------------

Method of Communication: <input type="checkbox"/> Face to Face <input type="checkbox"/> TeleConference <input type="checkbox"/> Video Conference <input type="checkbox"/> Email <input type="checkbox"/> Other <input type="text"/>	Date Conducted: <input type="text"/> <table style="width: 100%; text-align: center; font-size: x-small;"> <tr> <th colspan="7">May 2015</th> </tr> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td> </tr> <tr> <td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td> </tr> <tr> <td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td> </tr> <tr> <td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td> </tr> <tr> <td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td> </tr> <tr> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> </tr> </table>	May 2015							Su	Mo	Tu	We	Th	Fr	Sa	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6
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10	11	12	13	14	15	16																																																			
17	18	19	20	21	22	23																																																			
24	25	26	27	28	29	30																																																			
31	1	2	3	4	5	6																																																			

Release Employee Report
 Lock Employee Self-Assessment

Figure 5-17: "Reopened" Closeout Assessment Web Form

December 30, 2015

5-28

Notes.

1. The “Character Count” shown on the right just above each assessment textbox estimates the number of *savable* characters in the textbox, calculated as the actual number of characters entered plus 10% for padding. The padding is necessary because the CAS2Net database is configured with a universal multi-byte character set that uses more than one position to store some characters.

When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state.

Employee input status “In Progress” does not prevent the supervisor from saving information into the Closeout Assessment.

3. The employee’s Closeout Self-Assessment is displayed as “read only” when the supervisor has saved the Closeout Assessment with a checkmark in “Lock Employee Self-Assessment”.

4. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.

5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

6. When the “Reopen” button is clicked, the Closeout Assessment status reverts to “In Progress” with the following normal—but possibly unintended—consequences:

- Contribution Planning text and effective date are refreshed to capture recently “submitted” information.
- The 1st Level Supervisor who last saves the Mid-Point Review is the supervisor-of-record for reporting purposes. Earlier supervisor information may be overlaid by the “reopen” process.

5.6 Reports

Click “Reports” in the Supervisor I Menu of the navigation bar to display the Supervisor I Reports menu.

CAS2Net displays the following report options for the Level 1 Supervisor.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Appraisal Form Parts II and III – Single Employee
- Appraisal Form Parts II and III – All Employees
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment - Single Employee
- Closeout Assessment - All Employee

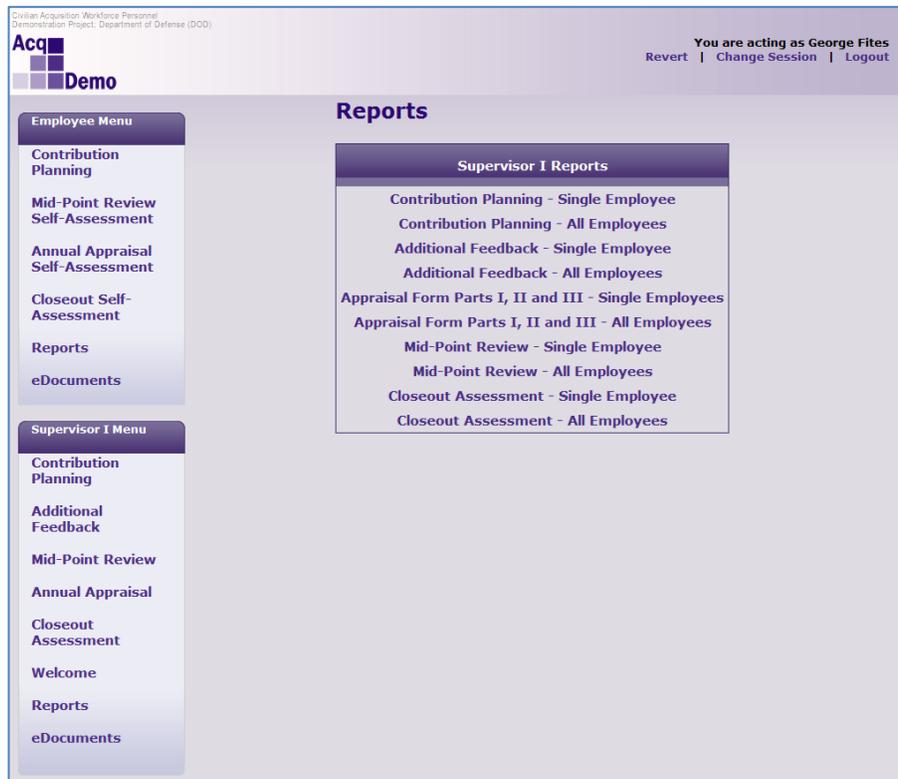


Figure 5-18: Level 1 Supervisor Reports Menu

Refer to Section “11.2 Supervisor Reports” for samples of each report.

LEVEL 1 SUPERVISOR REPORT - SINGLE EMPLOYEE

When the “Single Employee” option is selected, CAS2Net displays the [report] Employee “Report Generation Options” page.

- Select the name of the employee from the “Employee Selection” dropdown.
- Select the “Appraisal Year”.
- Click the “Generate” button.

When “Generate” is clicked, CAS2Net runs the selected report and opens a new window to display the generated Adobe PDF file.

Refer to Section “11.2 Supervisor Reports” for report samples.

Note. The “Contribution Planning – Employee” selection dropdown list includes only employees with Contribution Planning entries.

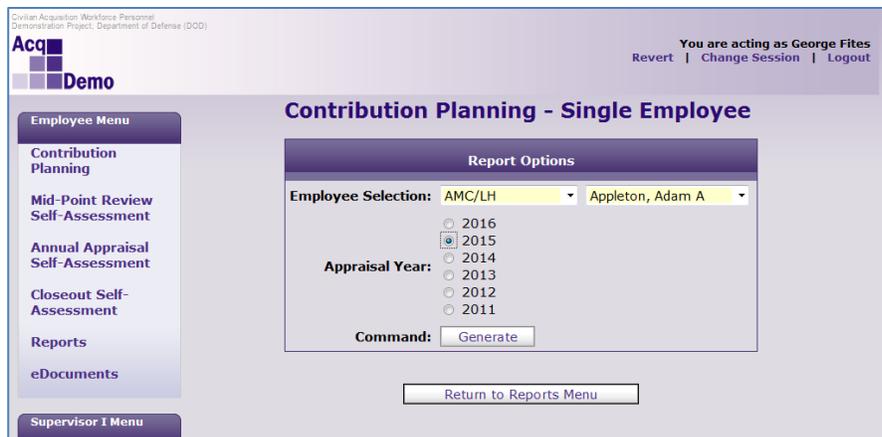


Figure 5-19: Level 1 Supervisor Employee Report Generation Options

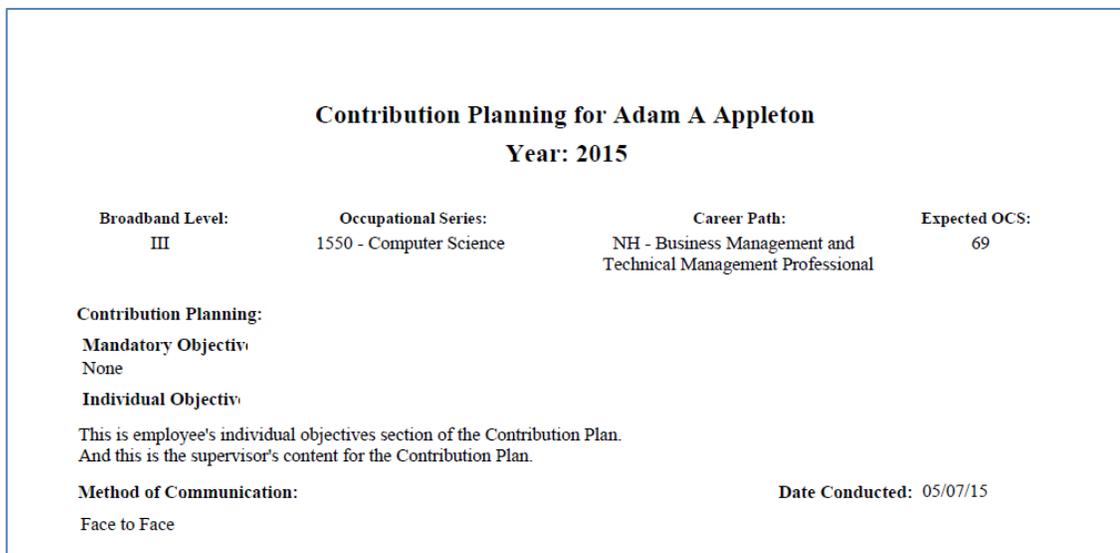


Figure 5-20: Level 1 Supervisor Single Employee Report Sample

LEVEL 1 SUPERVISOR REPORT – ALL EMPLOYEES

When the “All Employee” option is selected, CAS2Net displays the [report] Supervisor “Report Generation Options” page.

- Select the name from the “Supervisor Selection” dropdown (defaults to user name).
- Select the “Appraisal Year”.
- Click the “Generate” button.

When “Generate” is clicked, CAS2Net runs the selected report for all subordinate employees and opens a new window to display the generated Adobe PDF file. Use Adobe Acrobat controls to scroll through the report files and print selected pages.

Refer to Section “11.2 Supervisor Reports” for report samples.



Figure 5-21: Level 1 Supervisor All Employees Report Generation

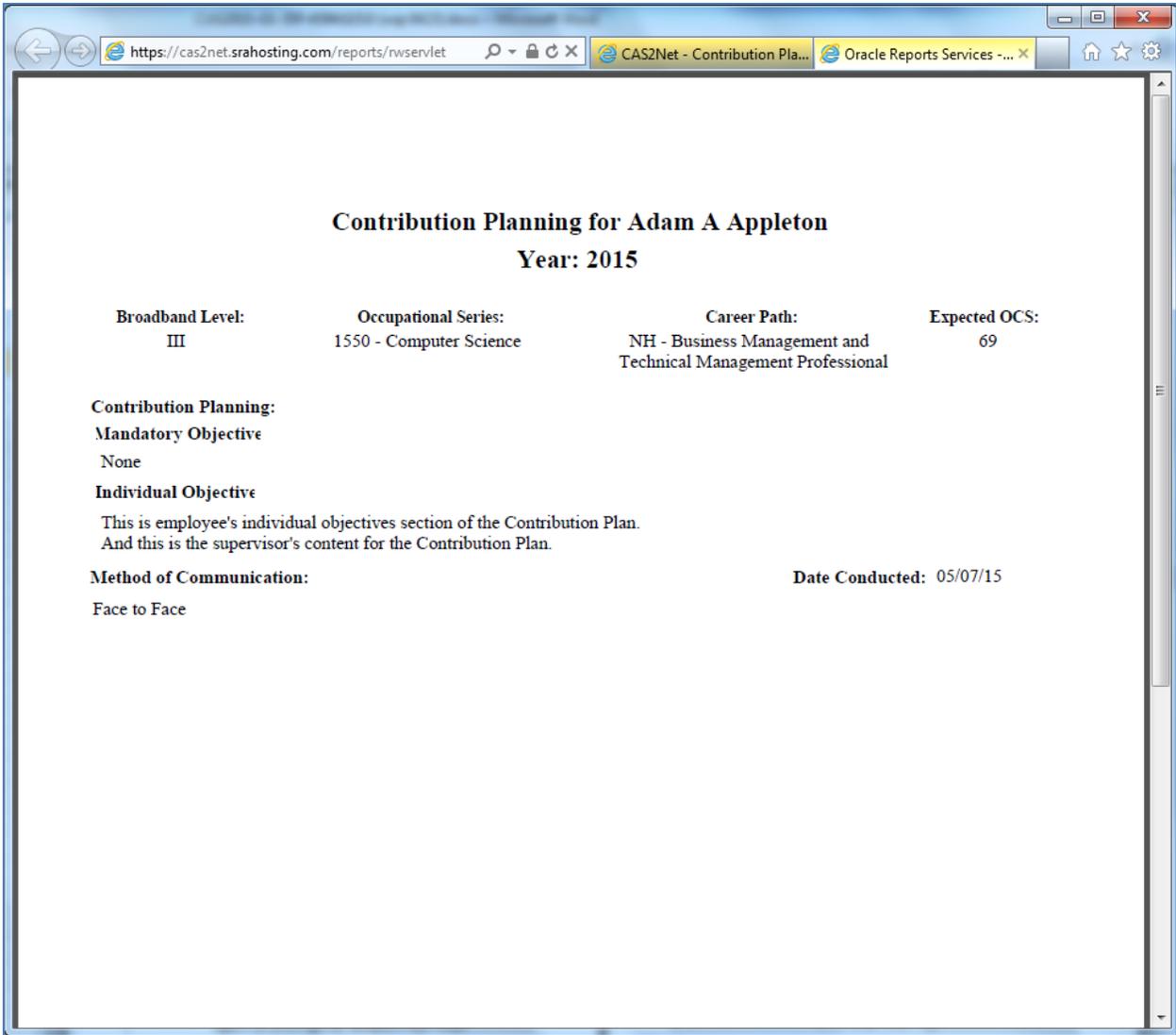


Figure 5-22: Level 1 Supervisor All Employees Report Sample

5.7 eDocuments - CAS2Net Document Repository

When end of cycle processes are complete and Annual Appraisals have been approved, both the 1st Level Supervisor and the employee will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository.

The steps below describe the content, accessibility and use of the CAS2Net Document Repository.

EDOCUMENT STATUS

Click “eDocuments” in the Supervisor I Menu of the navigation bar to the view the status of Annual Appraisal records in the CAS2Net Document Repository.

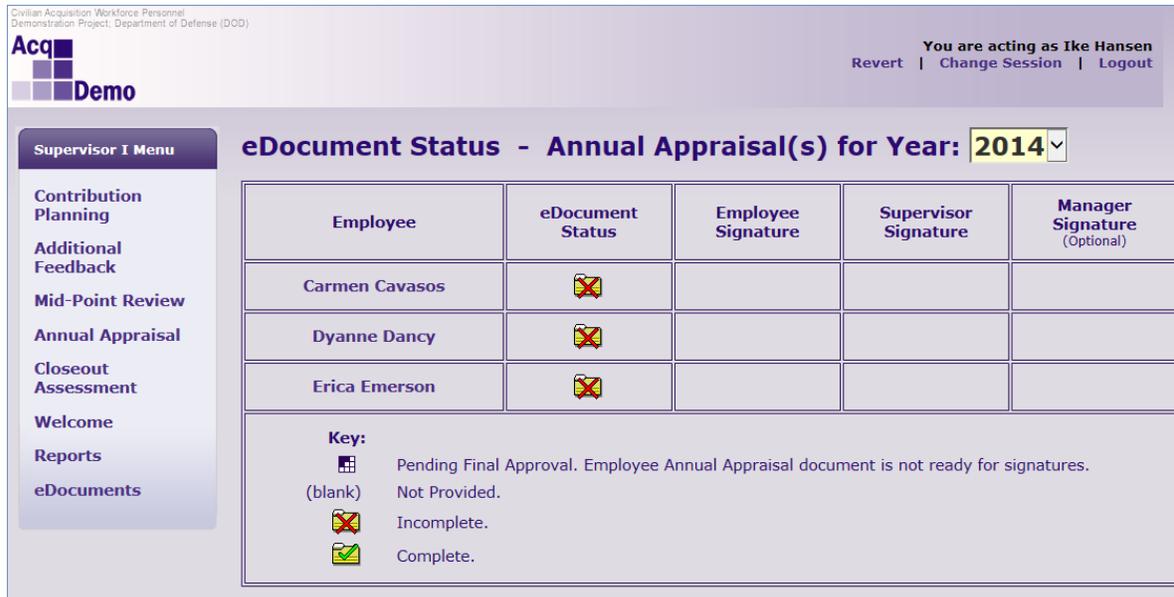


Figure 5-23: 1st Level Supervisor eDocument Status

The “eDocument Status” page summarizes CAS2Net Document Repository information by employee for the selected appraisal year. Note that the CAS2Net Document Repository applies only to appraisal cycles 2015 and beyond.

The “eDocument Status” page always lists employees for whom you are the current cycle 1st Level Supervisor—regardless of year. The current cycle 1st Level Supervisor has at least read-only access to all eDocument records for his subordinate employees.

Additionally, the “eDocument Status” web page includes employees for whom you had any assigned supervisor or manager relationship in the selected cycle year—or were later assigned a signatory role for the employee’s appraisal in the selected year.

“eDocument Status” web page content includes:

- The current appraisal year is shown as the default. Use the “Year” dropdown to refresh the web page with information for a different appraisal cycle.
- “Employee” name is a hot link to drill down into the repository record details if an appraisal is ready for signatures.

All blank columns to the right of the “Employee” name indicate that the Annual Appraisal has been NOT been approved is not available for signatures.

- “eDocument Status” reflects the overall status of the CAS2Net Document Repository record.

- A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Blanks in the “eDocument Status” column indicate the Annual Appraisal has not been approved.
 - A red “X” indicates that the Annual Appraisal has been approved but CAS2Net Document Repository information is incomplete.
Either the employee or 1st Level Supervisor signature is incomplete, or the PDF file has not yet been uploaded to CAS2Net.
 - A green checkmark indicates the PDF file has been uploaded with employee and 1st Level Supervisor signatures certified complete.
- The “Employee Signature” column indicates whether the employee signature has been certified complete.
 - A green checkmark indicates the PDF file has been uploaded with the employee signature certified complete.
 - A red “X” indicates the employee signature has not been certified complete.
 - Blank indicates the Annual Appraisal is not ready for signatures. Either the Annual Appraisal has not been approved or the PDF file has not yet been uploaded.
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - “Supervisor Signature” indicates whether the 1st Level Supervisor signature has been certified complete.
 - A green checkmark indicates the PDF file has been uploaded with 1st Level Supervisor’s signature certified complete.
 - A red “X” indicates the 1st Level Supervisor signature has not been certified complete.
 - Blank indicates Annual Appraisal is not ready for the 1st Level Supervisor signature. Either the Annual Appraisal has not been approved or the PDF file has not yet been uploaded.
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - The “Manager Signature” indicates whether a manager’s signature has been certified complete. A higher level supervisor or manager may optionally sign the employee’s Annual Appraisal.
 - A green checkmark indicates the PDF file has been uploaded with at least one higher level supervisor or manager signature certified complete.
 - A red “X” indicates at least one higher level supervisor or manager signature is outstanding for this document.
 - Blank indicates Annual Appraisal is not ready for a higher level supervisor or manager signature. Either the Annual Appraisal has not been approved or the PDF file has not yet been uploaded—or no manager signature has been specified.
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.

EDOCUMENT "SIGNING VIEW"

Click an **Employee** name link where all other columns are blank.

As previously noted, all blank columns to the right of the "Employee" name indicate that the Annual Appraisal has been NOT been approved and is not available for signatures.



Figure 5-24: 1st Level Supervisor eDocument Not Available

When the Annual Appraisal has not been approved, the “eDocument” page explicitly indicates that the Annual Appraisal is not available.

You will not be able to digitally sign the Annual Appraisal until the document has been formally approved.

Click an **Employee** name link where the “eDocument Status” is incomplete (i.e. column contains a red “X”) and the “Supervisor Signature” is incomplete (column is blank or contains a red “X”).

The red “X” in “eDocument Status” indicates the Annual Appraisal has been approved. The “Supervisor Signature” incomplete status indicates that the 1st Level Supervisor signature is outstanding.

The following steps describe how to attach your signature to the approved Annual Appraisal.

1. Retrieve the active Annual Appraisal PDF file for digital signing.

You’ll need to get the latest Annual Appraisal to attach your signature. For the first person to sign, CAS2Net provides a report link to generate an unsigned report PDF file.

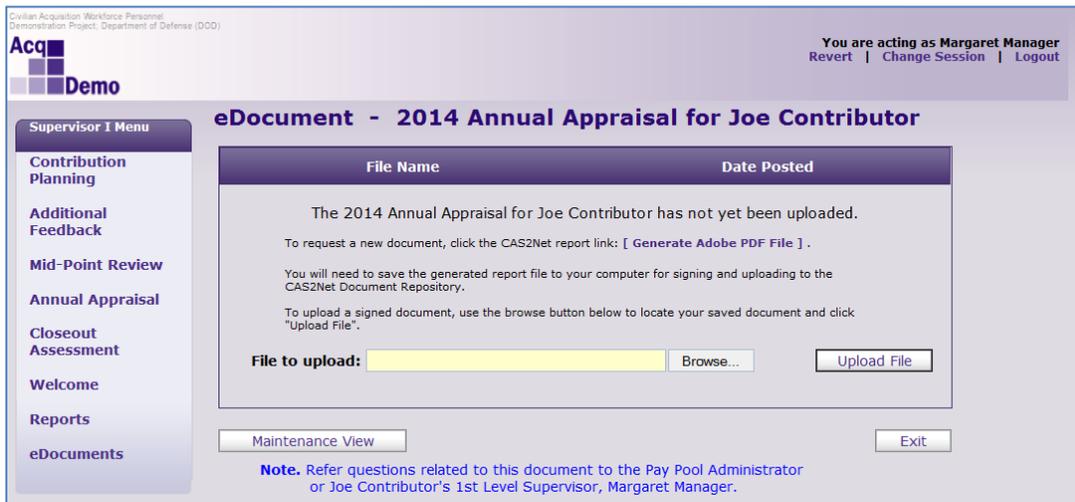


Figure 5-25: 1st Level Supervisor eDocument Generate PDF File

- Click the [Generate Adobe PDF File].

When you click [Generate Adobe PDF File], CAS2Net creates report “Appraisal Parts I,II, and III” displays it in a new window. Use the Adobe software’s file save feature to store the document on your local drive.

CCAS SALARY APPRAISAL DOCUMENT FOR 2014			
Part I: CCAS Salary Appraisal Form			
Name:	Joe Contributor	Series:	0801
CAS2Net ID:	2711	Broadband Level:	III
Organization:	AMC/LHXTB	Retained Pay:	No
Career Path:	NH	Presumptive:	None
Appraised By: Bob Arnold, Pay Pool Manager		Effective Date of Appraisal: January 1, 2015	
Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.			
_____		Date _____	
Supervisor Print / Sign		Date _____	
_____		Date _____	
Employee Print / Sign		Date _____	

Figure 5-26: 1st Level Supervisor eDocument Save PDF File

Alternatively, when a previously signed copy of the Annual Appraisal has already been saved, you'll need to add your signature to same document. CAS2Net displays the "eDocument" web page with input controls to support attaching another signature to the current active PDF file.

The "File Name" section provides a file name link to retrieve the saved Annual Appraisal for your signature along with input fields to later upload the signed PDF file.

The "Signatures" section displays signature information fields. "First Level Supervisor" signature inputs are provided for you to record details and certify that the uploaded PDF file contains your signature (see signature steps later steps in this description). Previously completed employee or higher level supervisor or manager signature details are displayed read-only.

Figure 5-27: 1st Level Supervisor eDocument Download Saved PDF File

- Right click the **File Name** and select option "Save Target As ..." to download the previously signed copy of the CAS2Net report "Appraisal Parts I,II, and III" and save it to your local hard drive.

2. Use Adobe Pro to digitally sign the appraisal.

Reference the appendix in the back of this user guide for guidance on using Adobe Pro products to digitally sign the Annual Appraisal.

- Appendix A – Digital Signatures Using Adobe X Pro.

Be sure to save the signed PDF file to your local hard drive!

3. Upload the signed PDF file.

After signing and saving the appraisal to your local hard drive, return to the eDocument update page.

- Use the “Browse” button to locate the saved PDF file.
- Click the “Upload File” button to add this file to the CAS2Net Document Repository.

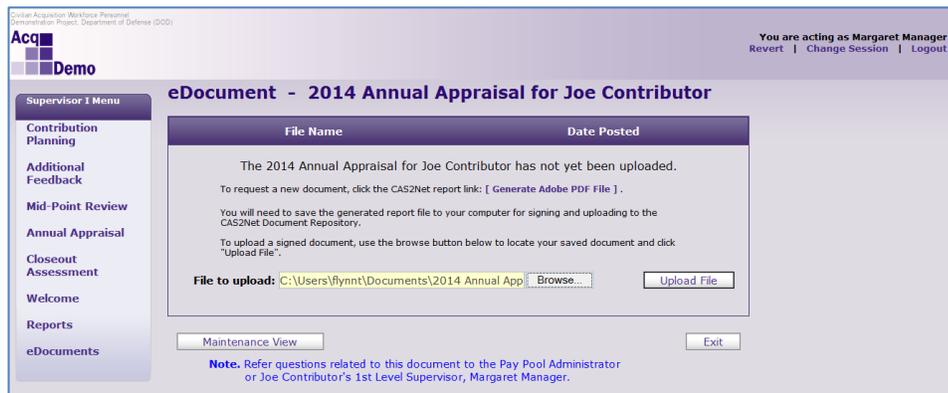


Figure 5-28: 1st Level Supervisor eDocument File Upload

When **Upload File** is clicked, CAS2Net adds the appraisal to the database, displays the message “File upload successful”, and presents the **Signatures** section for you to identify whose signatures are attached.



Figure 5-29: 1st Level Supervisor eDocument Upload Successful

4. Certify your signature.

Finally, use the “First Level Supervisor” signature input fields to inform CAS2Net that your signature is contained in the uploaded PDF file.

- You may change the pre-filled “Name” field, if necessary, to match your signature.
- Use the “Calendar” button to select the “Date Signed” from the calendar pop-up window.
- Choose the applicable “Signature Method” radio button –
 - “Digital” indicates you signed using Adobe Pro digital signing functionality.
 - “Handwritten” indicates you manually signed a hard copy printout of the appraisal, scanned the paper document to a file on your local drive that you then uploaded to CAS2Net.

Support for handwritten signatures is provided for CAS2Net users with no access digital signature software and/or hardware.

- Check the First Level Supervisor “Signature Certified Complete” checkbox to certify that the uploaded PDF file contains the signature information described.
- Click “Save” to update the CAS2Net Document Repository database record.

CAS2Net displays the message “Signatures successfully updated” to indicate the database has been updated, and redisplay the “eDocument” web page in read-only mode.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Margaret Manager
Revert | Change Session | Logout

eDocument - 2014 Annual Appraisal for Joe Contributor

Signatures successfully updated.

File Name	Date Posted
2014 Annual Appraisal for Joe Contributor.pdf	19-MAY-2015 05:19:24 PM

Click the file name link to open the document. To save to your computer, right click the file name and choose "Save Target As..."

Signatures

First Level Supervisor

Signature Certified Complete

Name: Margaret Manager Date Signed: 04/30/2015

Signature Method: Digital

Maintenance View Exit

Note. Refer questions related to this document to the Pay Pool Administrator or Joe Contributor's 1st Level Supervisor, Margaret Manager.

Figure 5-30: 1st Level Supervisor eDocument Signature Updated

That’s it. The 1st Level Supervisor eDocument signing process is complete when the Annual Appraisal PDF file has been uploaded and 1st Level Supervisor signature details are certified complete.

Note that the “eDocument” web page identifies the 1st Level Supervisor for the corresponding appraisal cycle—in most cases your name will be shown.

The **Maintenance View** button at the bottom of the “eDocument” web page toggles between the “Signing View” (just described) and the “Maintenance View” for handling various discrepancies.

The “Exit” button returns to the “eDocument Status” page which reflects the updated information.

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Adam A. Appleton
Revert | Change Session | Logout

eDocument Status - Annual Appraisal(s) for Adam A. Appleton

Year	Employee Signature	Supervisor Signature	Manager Signature (Optional)	eDocument Status
2015				
2014				

Key:
 Complete.
 Incomplete.
 Not Provided.

Employee Menu
 Contribution Planning
 Mid-Point Review Self-Assessment
 Annual Appraisal Self-Assessment
 Closeout Self-Assessment
 Reports
 eDocuments
 Welcome

Figure 5-31: 1st Level Supervisor eDocument Status Updated

The “Employee Signature” column contains a green checkmark indicating the employee signature has been certified complete.

The “Supervisor Signature” column contains a red “X” indicating the 1st Level Supervisor signature is incomplete.

The “Manager Signature” column is blank indicating an optional higher level supervisor or manager has not been specified for this Annual Appraisal.

The overall “eDocument Status” column contains a red “X” indicating that the Annual Appraisal is ready for employee review but required information is still incomplete.

The “Employee Signature” and “Supervisor Signature” columns are non-blank indicating the Annual Appraisal PDF file has been uploaded but required signatures are not certified complete.

EDOCUMENT “MAINTENANCE VIEW”

The effective 1st Level Supervisor for a given appraisal has maintenance capabilities to manage the CAS2Net Document Repository record.

5. From the 1st Level Supervisor “eDocument Status” page, click the **Employee** name link where the “eDocument Status” is non-blank. Note that “eDocument Maintenance” features are enabled for any status indicator except blanks (i.e. Appraisal not approved).
 - Click the “Maintenance View” button at the bottom of the “eDocument” web page to access “eDocument Maintenance” features.
 - Click the “Signing View” button at the bottom of the “eDocument Maintenance” web page to toggle back to the 1st Level Supervisor “eDocument” signing view.

Reference the “eDocument Maintenance” sub-section in the Pay Pool Administrator “Data Maintenance” section for guidance on the content and use of these features.

6. LEVEL 2 SUPERVISOR

The Level 2 Supervisor uses CAS2Net to review the ratings of assigned employees for completeness of forms and accurate application and adherence to AcqDemo policies and procedures. The Level 2 Supervisor also reviews the performance ratings of employees for fair consideration, and consistency across the appraising supervisors.

The “Supervisor II Menu” in the navigation bar includes links to: **Welcome**, **Reports** and **eDocuments**.

If the Level 2 Supervisor is also a “demo” employee, then the following “Employee Menu” options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, and employee **Reports**.

Refer to Section “4. Employee” for information relating to the Employee Menu features.

When the Level 2 Supervisor has responsibility for rating the performance of direct reports, then the following supervisor assessment options will appear at the top of the “Supervisor II Menu” in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

These features are detailed in Section “5. Level 1 Supervisor”.

The Level 2 Supervisor menu features the **Reports** option to view the following reports:

- **Contribution Planning** reports to view contribution planning objectives for current and past performance cycles.
- **Additional Feedback** reports to view optional employee guidance given during the performance cycle.
- **Mid-Point Review** reports to view employee performance assessments at the mid-point of the annual the performance cycle.
- **Closeout Assessment** reports to view employee performance assessments for partial year position assignments.
- **Annual Appraisal** reports to view employee performance ratings and assessments with respect to the AcqDemo performance factors.
- **Appraisal Status Report** summarizes assessments status by employee.

7. SUB-PANEL MANAGER

The Sub-Panel Manager uses CAS2Net to review the rating of a selected employee for completeness of forms and accurate application and adherence to AcqDemo policies and procedures. The Sub-Panel Manager also reviews the performance ratings of employees for fair consideration, and consistency across the appraising supervisors.

All Sub-Panel Managers will have the following menu options: **Welcome**, **Sub-Panel Meeting**, **Appraisal Status**, **Reports**, and **eDocuments**.

- **Welcome** displays the CAS2Net welcome screen.
- The **Sub-Panel Meeting** option provides the tools for comparing “Categorical” and “Numerical” scores across all employees in the Sub-Panel Manager’s reporting hierarchy.
- The **Appraisal Status** option provides appraisal status details by employee.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.
- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports for your subordinates. CAS2Net enables the Level 1 Supervisor to upload signed documents on behalf of others and make necessary corrections.

If the Sub-Panel Manager is also a “demo” employee, then the following “Employee Menu” options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, and **Reports**.

Refer to Section “4. Employee” for information relating to the Employee Menu features.

When the Sub-Panel Manager has responsibility for rating the performance of direct reports, then the following supervisor assessment options will appear at the top of the Sub-Panel Manager Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

These features are detailed in Section “5. Level 1 Supervisor”.

7.1 Sub-Panel Meeting

When Sub-Panel Meeting is selected from the Sub-Panel Manager menu, CAS2Net displays the “SubPanel Meeting Menu” selection page.



Figure 7-1: Sub Panel Meeting Menu

Choose Career Path radio button.

Click Sub-Panel Meeting Menu option to select Sub-Panel Meeting feature:

- Preliminary (Categorical) Score Module
- Integer (Final) Score Module
- Composite Score Module
- Presumptive Score Module
- Offline Sub-Panel Meeting

7.1.1 Preliminary (Categorical) Score Module

The “Preliminary (Categorical) Score Module” provides tools for reviewing and comparing employee categorical ranking for the same performance factor relative to others in the same career path and level of performance.

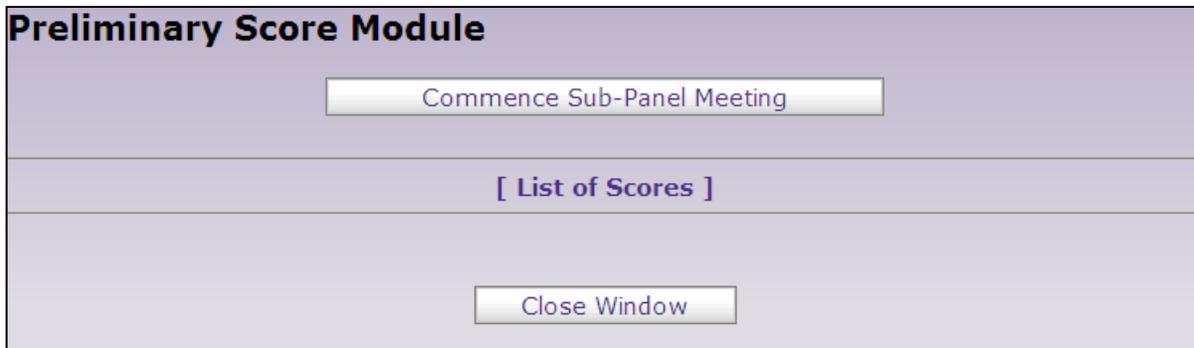


Figure 7-2: Preliminary (Categorical) Score Module “Selection”

Click the “[List of Scores]” link on the Preliminary Score Module selection web page to display the names and preliminary (categorical) scores for all sub-panel employees.

ID	Employee Name	Problem Solving	Teamwork/Cooperation	Customer Relations	Leadership/Supervision	Communication	Resource Management
11	Quarles, Richard (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
12	Stewart, Tammy (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
13	Udell, Vincent (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
2572	Hoang, Danielle (1)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
2611	Hummer, Hershel (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
2612	Appleton, Adam (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
2613	Mucker, Mark (3)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated

Figure 7-3: Preliminary (Categorical) Score Module “List of Scores”

Click the “Commence Sub-Panel Meeting” button to open the Sub-Panel Meeting web page.

Preliminary Score Module
 Sub-Panel Meeting for Dan Curtiss - Career Path: **Business Management and Technical Management Professional (NH)**
 Double-click the name to assign the Integer score.

<p>FACTOR:</p> <ul style="list-style-type: none"> Problem Solving Teamwork/Cooperation Customer Relations Leadership/Supervision Communication Resource Management <p>Factor Description</p>	<p>Level:</p> <p><input type="radio"/> I</p> <p><input type="radio"/> II</p> <p><input type="radio"/> III</p> <p><input type="radio"/> IV</p>	<p>Employee Movement:</p> <p style="text-align: center;">Up</p> <p style="text-align: center;">Left Deselect Right</p> <p style="text-align: center;">Down</p> <p style="text-align: center;">Move to Unrated</p>	<p>UNRATED-----</p> <table border="1"> <tr><td>Appleton, Adam (3)</td><td>9</td></tr> <tr><td>Hoang, Danielle (1)</td><td>79</td></tr> <tr><td>Hummer, Hershel (3)</td><td>81</td></tr> <tr><td>Mucker, Mark (3)</td><td>78</td></tr> <tr><td>Quarles, Richard (3)</td><td>73</td></tr> <tr><td>Stewart, Tammy (3)</td><td>85</td></tr> <tr><td>Udell, Vincent (3)</td><td></td></tr> </table> <p>Move From Unrated</p>	Appleton, Adam (3)	9	Hoang, Danielle (1)	79	Hummer, Hershel (3)	81	Mucker, Mark (3)	78	Quarles, Richard (3)	73	Stewart, Tammy (3)	85	Udell, Vincent (3)	
Appleton, Adam (3)	9																
Hoang, Danielle (1)	79																
Hummer, Hershel (3)	81																
Mucker, Mark (3)	78																
Quarles, Richard (3)	73																
Stewart, Tammy (3)	85																
Udell, Vincent (3)																	

Save Changes Save & Close

1L (0 - 5)-----	1M (6 - 23)-----	1H (24 - 29)-----	2L (22 - 29)-----
-----------------	------------------	-------------------	-------------------

Edit Comments

Close Window

Figure 7-4: Preliminary (Categorical) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

Employee names are shown in list boxes that correspond to the preliminary score category along with integer score values, if available. Radio buttons allow the user to show a set of categories corresponding to the lowest to the highest level of performance. Employee movement buttons are provided to redistribute the employee higher or lower in the same list—or left or right to adjacent preliminary category list boxes.

7.1.2 Integer (Final) Score Module

Click “Integer (Final) Score Module” on the Sub-Panel Meeting Menu to display the Integer Score Web Page.

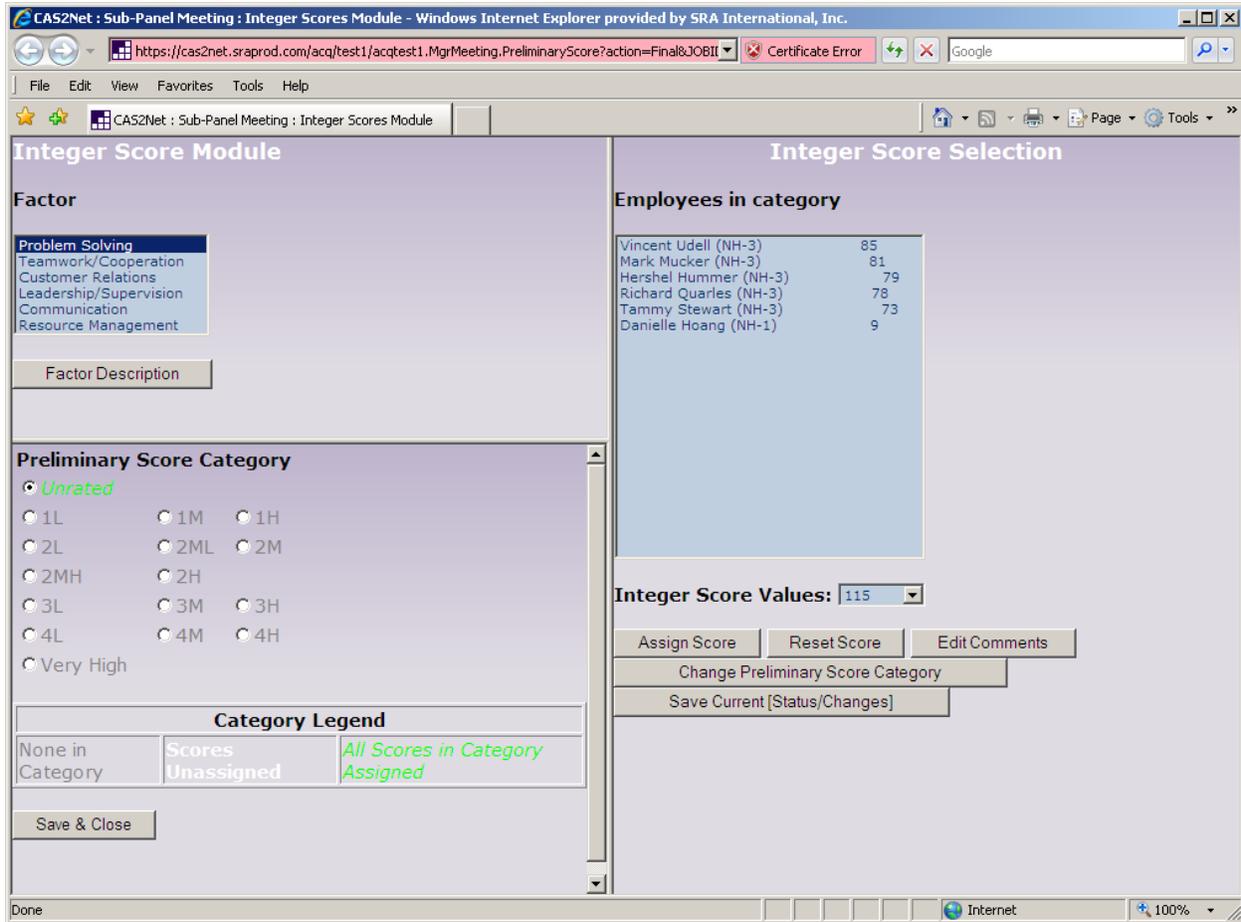


Figure 7-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

The user selects Sub-Panel Meeting from the CAS2Net main menu. From the Sub-Panel Meeting menu page, the user selects a career path and chooses “Integer (Final) Score Module”.

The “Integer Score Module” filters the Sub-Panel employees for the selected career path by performance factor and preliminary score category. The supervisor or manager can select an employee and assign an integer score, edit comments, and change the preliminary score category.

7.1.3 Composite Score Module

The “Composite Score Module” provides a final check on the scores that have been assigned. It calculates an overall OCS score for each employee as a weighted average of the performance factors. All employees and their corresponding OCS scores are displayed in this list.

Composite Score Module					
Name	Career Path	Level	OCS Score	Expected Score	Final Rail Psn
Appleton, Adam	NH	III		70	
Hoang, Danielle	NH	I	18	17	C2
Hummer, Hershel	NH	III	73	73	C1
Mucker, Mark	NH	III	75	72	C2
Quarles, Richard	NH	III	79	74	B
Stewart, Tammy	NH	III	78	74	B
Udell, Vincent	NH	III	77	74	C2
Yates, Zane	NJ	IV	81	74	B

Green OCS scores are complete.
 Blank OCS scores indicate one or more factors without an integer score.
Rail Position
 A = Above Upper Rail
 B = Below Lower Rail
 C1 = Between the Upper Rail and the SPL
 C2 = Between the Lower Rail and the SPL

Close Window

Figure 7-6: Composite Score Module Web Page

The user selects Sub-Panel Meeting from the CAS2Net main menu. From the Sub-Panel Meeting menu page, the user chooses “Composite Score Module”.

CAS2Net brings up a list of employees in the Sub-Panel that includes employee name, career path, performance level, calculated OCS score, expected score, and final rail position.

7.1.4 Presumptive Employees List

Click the “Presumptive Employees List” button to display a listing of presumptive employees.

Presumptive Employees List			
The following employees are presumptive and will not be included in the Preliminary or Final Score modules.			
ID	Social Security #	Employee Name	Presumptive Type
There are no Presumptive Employees			

Close Window

Figure 7-7: Presumptive Employees List

The “Presumptive Employees List” includes the CAS2Net employee id, social security number, employee name and presumptive type

7.1.5 Offline Sub-Panel Meeting

The Offline Interface web page provides the tools to upload or download Employee Data for the Sub-Panel Meeting.

From the Sub Panel Meeting Menu page, click “Offline Sub-Panel Meeting” to display the “Offline Interface” page with buttons to choose download or upload employee data functions.

The name of your pay pool will be displayed in the Pay Pool dropdown. If you have access to multiple pay pools, select the name of the pay pool you want to access.

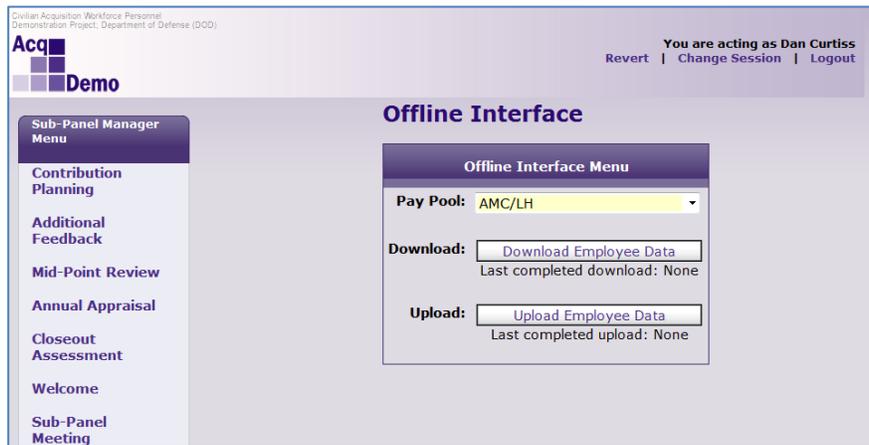
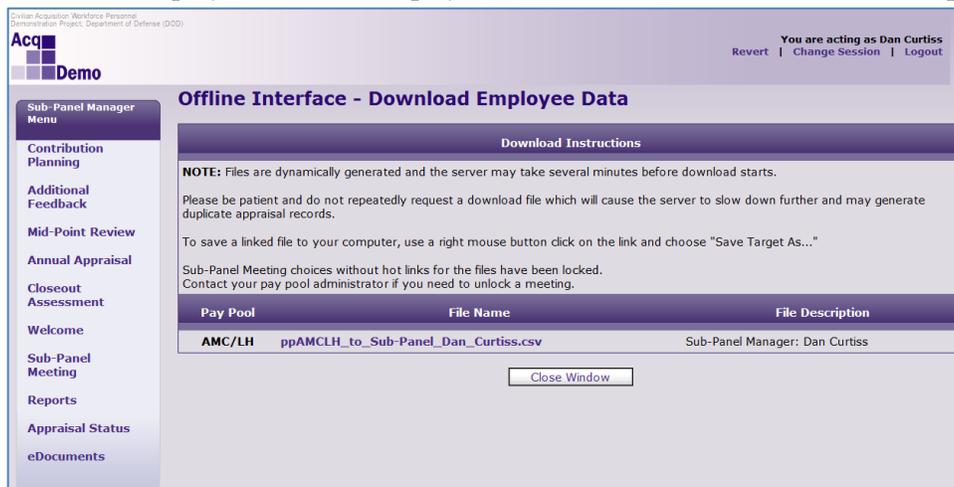


Figure 7-8: Sub Panel Meeting “Offline Interface” Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

Click “Download Employee Data” to display the “Offline Interface – Download Employee Data”



page.

Figure 7-9: Offline Interface – Download Employee Data

The Sub-Panel Manager has the capability to download sub-panel employee data that can later be imported into the CCAS Spreadsheet for Sub-Panel review. When offline meeting activities are concluded, the data can be exported from the spreadsheet and uploaded back to the CAS2Net database using the “Upload Employees Scores” button.

Click the filename hot link to produce a text file containing CAS2Net employee data in “comma delimited file” (CSV) file format.

SUB-PANEL UPLOAD EMPLOYEE DATA

Click “Upload Employee Data” to display the “Offline Interface – Upload Employee Data” page.

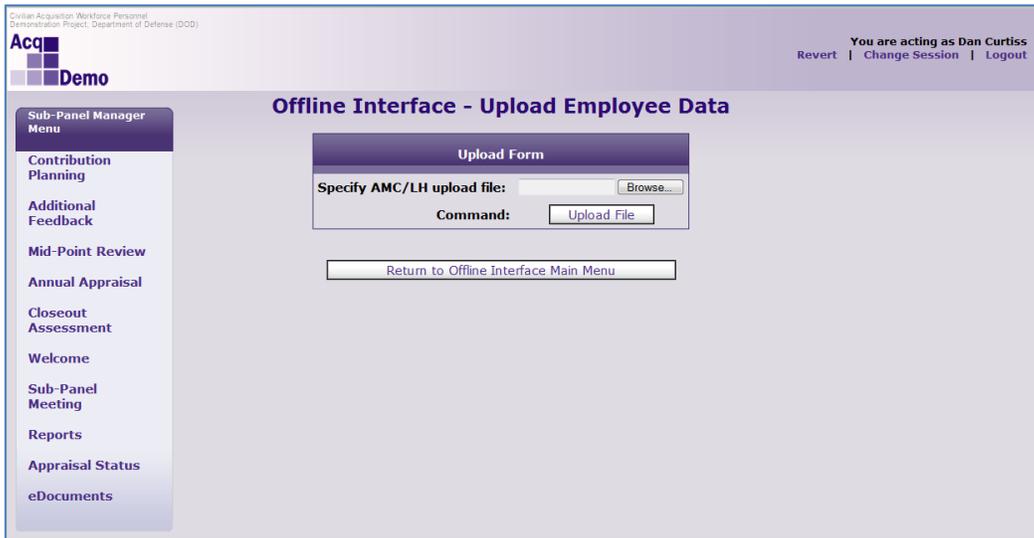


Figure 7-10: Offline Interface – Upload Employee Data

“Upload Employee Data” parses an external text file produced by the CCAS Spreadsheet and updates the CAS2Net database with the file content.

7.2 Appraisal Status

The Appraisal Status web page lists Sub-Panel Manager employees' appraisal status for review by First Level Supervisor.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

Acq Demo

You are acting as Dan Curtiss
[Revert](#) | [Change Session](#) | [Logout](#)

Appraisal Status

Grouped by First Level Supervisor
 (with Dan Curtiss as Subpanel Manager)

Supervisor	Emp Count	Appraisals Complete	Avg Delta OCS	Std Dev
Dan Curtiss	2	0	N/A	N/A
Peter Olson	2	0	N/A	N/A
Richard Quarles	4	0	N/A	N/A

Figure 7-11: Sub-Panel Manager Appraisal Status

2nd Level Supervisors are shown Sub-Panel employees grouped by 1st Level Supervisor.

Click the supervisor name to drill down to the 1st Level Supervisor list or the detail page listing subordinate employees.

Employee detail columns include (1st Level) supervisor name, (pay pool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

Employees with Dan Curtiss as Subpanel Manager

Supervisor Name	Office Symbol	Employee Name	Previous OCS	Current OCS	Expected OCS	Problem Solving	Teamwork/ Cooperation	Customer Relations	Leadership/ Supervision	Communication	Resource Management
Peter Olson	AMC/LH	Adam Appleton	N/A	0 (Incomp.)	70						
Peter Olson	AMC/LH	Hershel Hummer	N/A	73 (Comp.)	73	79	73	65	74	75	72
Peter Olson	AMC/LH	Mark Mucker	62	75 (Comp.)	72	81	67	71	78	72	78

[Back](#)

Figure 7-12: Sub-Panel Manager Appraisal Status Employee Details

7.3 Reports

Click “Reports” in the Sub-Panel Manager Menu of the navigation bar to display the Sub-Panel Manager Reports menu.

CAS2Net provides the following report options for the Sub-Panel Manager.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Appraisal Form Parts I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- Contribution Planning Status
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Appraisal Status Report



Figure 7-13: Sub-Panel Manager Reports Menu

Refer to Section [11.2 Supervisor Reports](#) for samples of each report.

7.4 eDocuments - CAS2Net Document Repository

The CAS2Net Document Repository is the database collection of digitally signed Annual Appraisal reports stored by employee by fiscal cycle.

When end of cycle processes are complete and Annual Appraisals have been approved, both the 1st Level Supervisor and the employee will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository. Since higher level supervisors and managers may rate or review Annual Appraisals for subordinate employees, virtually any CAS2Net user group above 1st Level Supervisor may also need to sign Annual Appraisals in the CAS2Net Document Repository.

Reference section “12.0 CAS2Net Document Repository (eDocuments)” in this user guide for an overview of the CAS2Net Document Repository content and functionality for all CAS2Net users.

8. PAY POOL MANAGER

The Pay Pool Manager uses the CAS2NET to monitor the progress of performance appraisals through the review workflow. The Pay Pool Manager views the performance ratings of employees in the pay pool for fair consideration, and consistency across the appraising supervisors.

The Pay Pool Manager will always have the following menu options: **Welcome**, **Sub-Panel Meeting**, **Reports**, **Appraisal Status**, and **eDocuments**.

- **Welcome** displays the CAS2Net welcome screen.
- The **Sub-Panel Meeting** option provides the tools for comparing “Categorical” and “Numerical” scores across all employees in the Sub-Panel Manager’s reporting hierarchy.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.
- The **Appraisal Status** option provides appraisal status details by employee.
- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports for your subordinates. CAS2Net enables the Level 1 Supervisor to upload signed documents on behalf of others and make necessary corrections.

If the Pay Pool Manager is also a “demo” employee, then the following “Employee Menu” options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, and **Employee Reports**.

Refer to Section “4. Employee” for information relating to the Employee Menu features.

When the Pay Pool Manager has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Pay Pool Manager Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**.

Refer to Section “5. Level 1 Supervisor” for information relating to these menu items.

8.1 Sub-Panel Meeting

When Sub-Panel Meeting is selected from the Pay Pool Manager menu, CAS2Net displays the “SubPanel Meeting Menu” selection page.

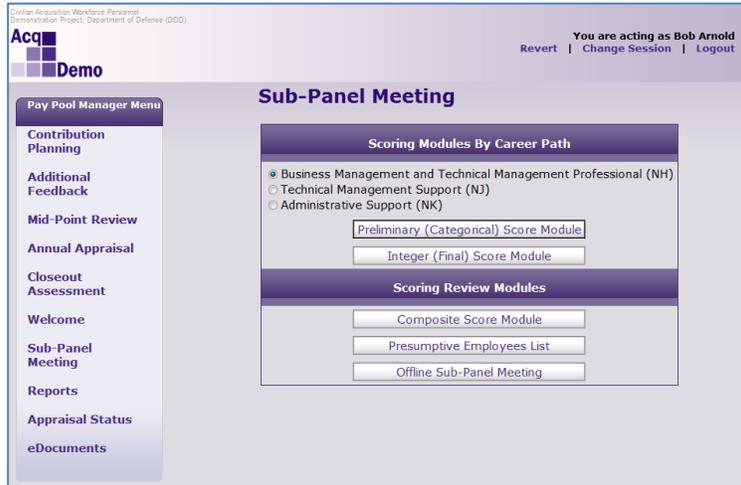


Figure 8-1: Sub Panel Meeting Menu

Click the radio button associated with a given Career Path selection.

Click one of the following buttons to activate the Sub-Panel Meeting module:

- Preliminary (Categorical) Score Module
- Integer (Final) Score Module
- Composite Score Module
- Presumptive Score Module
- Offline Sub-Panel Meeting

8.1.1 Preliminary (Categorical) Score Module

The “Preliminary (Categorical) Score Module” provides tools for reviewing and comparing employee categorical ranking for the same performance factor relative to others in the same career path and level of performance.

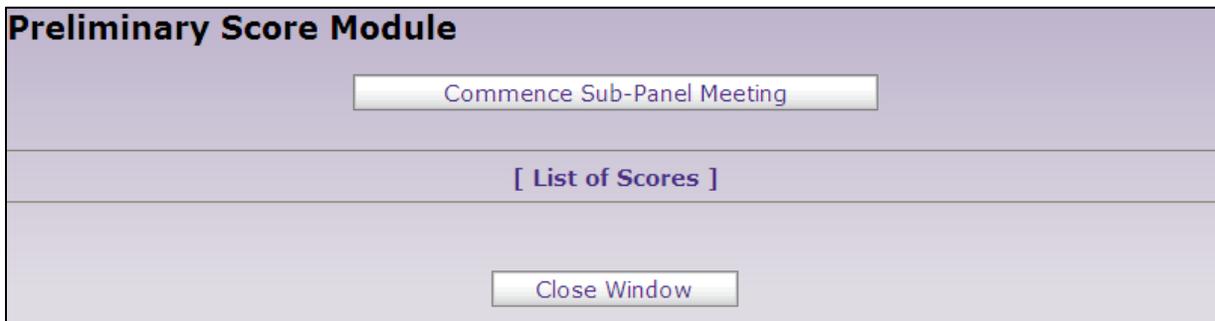


Figure 8-2: Preliminary (Categorical) Score Module “Selection” Menu

Click the “[List of Scores]” link on the Preliminary Score Module selection web page to display the names and preliminary (categorical) scores for all sub-panel employees.

Preliminary Score Module							
List of Employees Preliminary Scores							
ID	Employee Name	Problem Solving	Teamwork/Cooperation	Customer Relations	Leadership/Supervision	Communication	Resource Management
6	Gonzalez, Helen (4)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
7	Iverson, John (4)	Unrated	Unrated	Unrated	Unrated	Unrated	Unrated
1472	Michelson, Nancy (4)	Unrated	Unrated	4M	Unrated	Unrated	Unrated

Close Window

Figure 8-3: Preliminary (Categorical) Score Module “List of Scores”

Click the “Commence Sub-Panel Meeting” button to open the Sub-Panel Meeting web page.

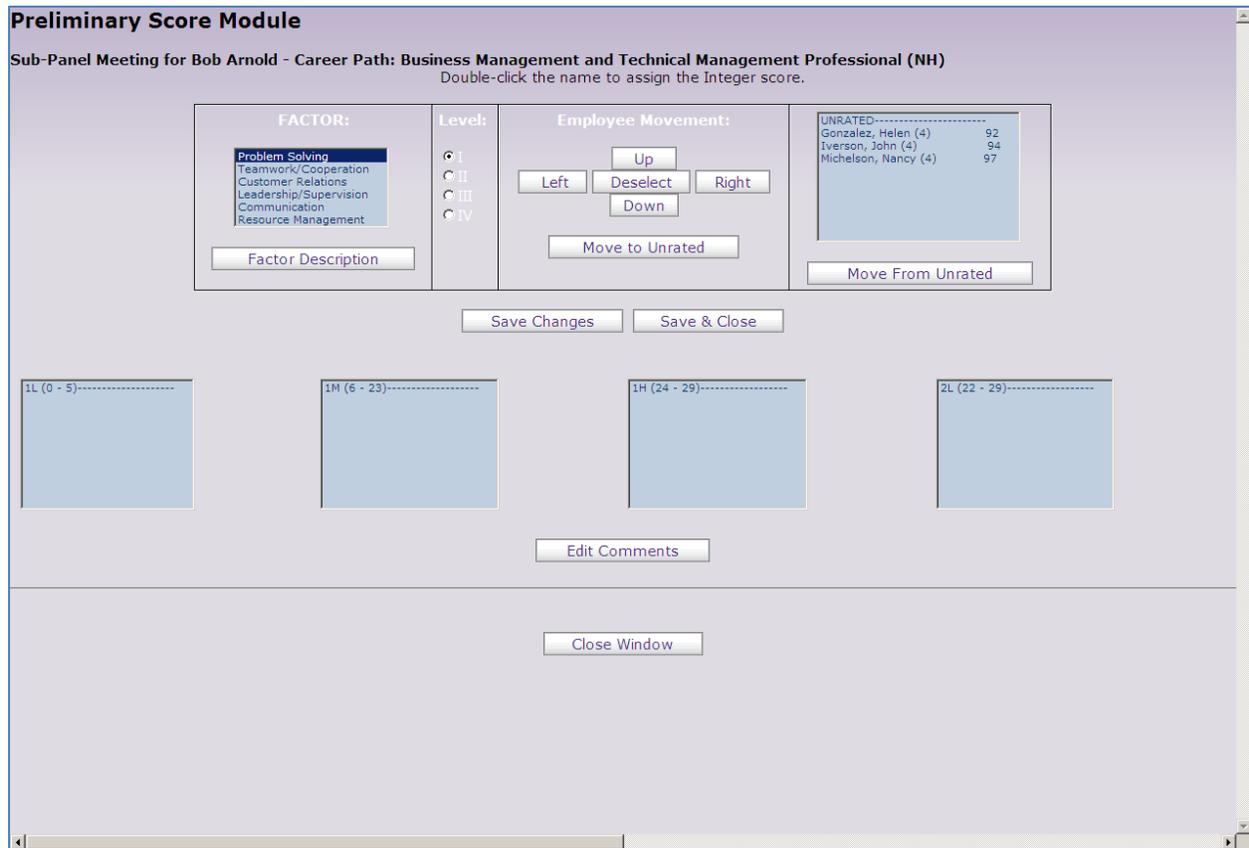


Figure 8-4: Preliminary (Categorical) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

Employee names are shown in list boxes that correspond to the preliminary score category along with integer score values, if available. Radio buttons allow the user to show a set of categories corresponding to the lowest to the highest level of performance. Employee movement buttons are provided to redistribute the employee higher or lower in the same list—or left or right to adjacent preliminary category list boxes.

8.1.2 Integer (Final) Score Module

Click “Integer (Final) Score Module” on the Sub-Panel Meeting Menu to display the Integer Score Web Page.

Integer Score Module

Factor

- Problem Solving
- Teamwork/Cooperation
- Customer Relations
- Leadership/Supervision
- Communication
- Resource Management

Factor Description

Preliminary Score Category

Unrated

1L 1M 1H

2L 2ML 2M

2MH 2H

3L 3M 3H

4L 4M 4H

Very High

Category Legend		
None in Category	Scores Unassigned	All Scores in Category Assigned

Save & Close

Integer Score Selection

Employees in category

Nancy Michelson (NH-4)	97
John Iverson (NH-4)	94
Helen Gonzalez (NH-4)	92

Integer Score Values: 115

Assign Score Reset Score Edit Comments

Change Preliminary Score Category

Save Current [Status/Changes]

Paypool Employee List

Figure 8-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

The “Integer Score Module” filters the Sub-Panel employees for the selected career path by performance factor and preliminary score category. The supervisor or manager can select an employee and assign an integer score, edit comments, and change the preliminary score category.

8.1.3 Composite Score Module

The “Composite Score Module” provides a final check on the scores that have been assigned. It calculates an overall OCS score for each employee as a weighted average of the performance factors. All employees and their corresponding OCS scores are displayed in this list. From the Sub-Panel Meeting menu page, click “Composite Score Module”.

Composite Score Module

Name	Career Path	Level	OCS Score	Expected Score	Final Rail Psn
Gonzalez, Helen	NH	IV	88	90	C1
Iverson, John	NH	IV		90	
Michelson, Nancy	NH	IV	88	90	C1

Green OCS scores are complete.
 Blank OCS scores indicate one or more factors without an integer score.
Rail Position
 A = Above Upper Rail
 B = Below Lower Rail
 C1 = Between the Upper Rail and the SPL
 C2 = Between the Lower Rail and the SPL

Figure 8-6: Composite Score Module Web Page

CAS2Net brings up a list of employees in the Sub-Panel that includes employee name, career path, performance level, calculated OCS score, expected score, and final rail position.

8.1.4 Presumptive Employees List

From the Sub-Panel Meeting menu page, click the “Presumptive Employees List” button to display a listing of presumptive employees.

Presumptive Employees List

The following employees are presumptive and will not be included in the Preliminary or Final Score modules.

ID	Social Security #	Employee Name	Presumptive Type
There are no Presumptive Employees			

Figure 8-7: Presumptive Employees List

The “Presumptive Employees List” includes employee id, social security number, name and presumptive type.

8.1.5 Offline Sub-Panel Meeting

The Offline Interface web page provides the tools to upload or download Employee Data for the Sub-Panel Meeting.

From the Sub Panel Meeting Menu page, click “Offline Sub-Panel Meeting” to display the “Offline Interface” page with buttons to choose download or upload employee data functions.

The name of your pay pool will be displayed in the Pay Pool dropdown. If you have access to multiple pay pools, select the name of the pay pool you want to access.

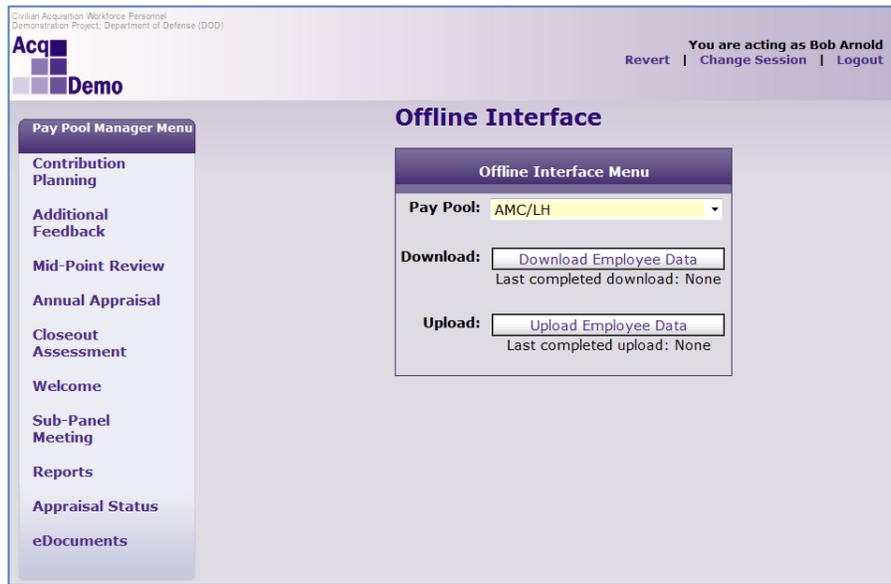


Figure 8-8: Sub Panel Meeting “Offline Interface” Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

Click “Download Employee Data” to display the “Offline Interface – Download Employee Data” page.

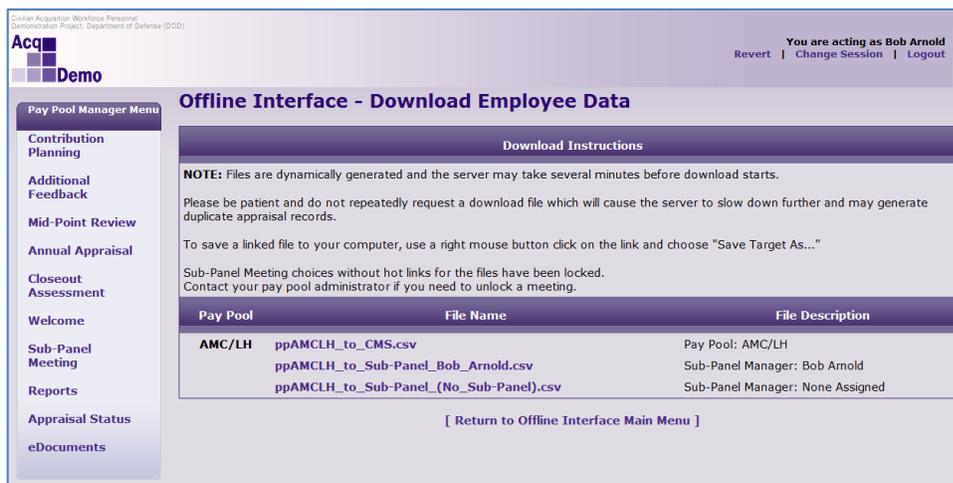


Figure 8-9: Offline Interface – Download Employee Data

The Pay Pool Manager has the capability to download employee data that can later be imported into

the CCAS Spreadsheet for pay pool or sub-panel review. When offline meeting activities are concluded, the data can be exported from the spreadsheet and uploaded back to the CAS2Net database using the “Upload Employees Scores” button.

Click the filename hot link to produce a text file containing CAS2Net employee data in “comma delimited file” (CSV) file format.

SUB-PANEL UPLOAD EMPLOYEE DATA

Click “Upload Employee Data” to display the “Offline Interface – Upload Employee Data” page.

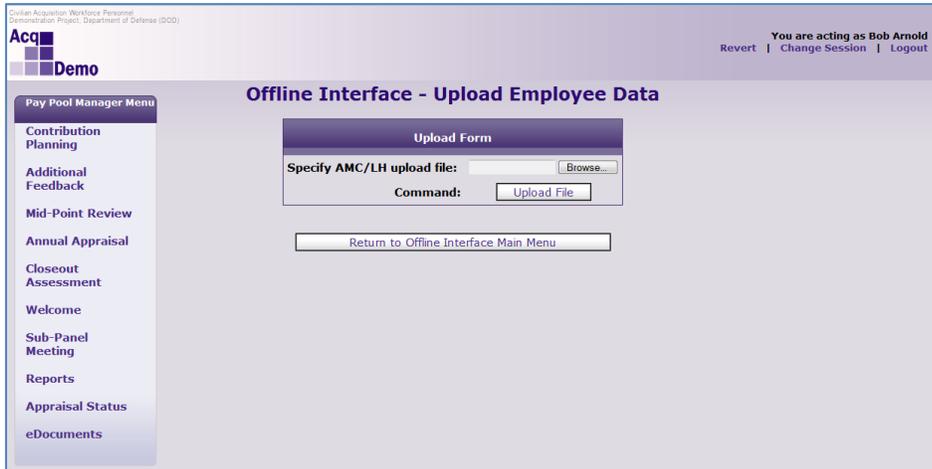


Figure 8-10: Offline Interface – Upload Employee Data

“Upload Employee Data” parses an external text file produced by the CCAS Spreadsheet and updates the CAS2Net database with the file content.

8.2 Appraisal Status

The Appraisal Status web page lists Sub-Panel Meeting employee appraisal status for review by Sub-Panel Meeting managers grouped by Subpanel Manager and 1st Level Supervisor.

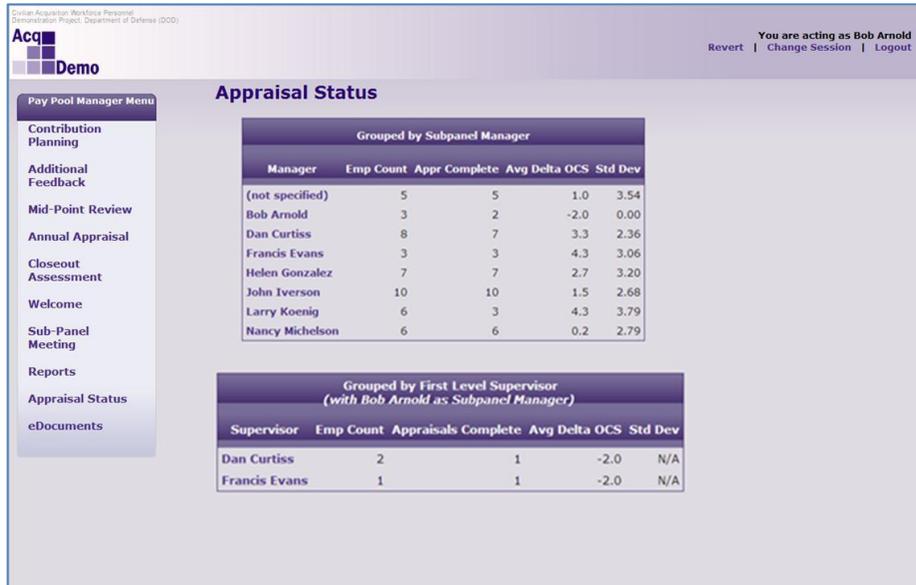


Figure 8-11: Pay Pool Manager Appraisal Status

Pay Pool Managers are shown sub-panel employees grouped by 1st Level Supervisor. Information columns include supervisor name, total employees, number of employees with complete scores, average delta OCS, and standard deviation.

Click a supervisor name to drill down to the lower level supervisor list or the detail page listing subordinate employees.

Employee detail columns include (1st Level) supervisor name, (pay pool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

Appraisal Status											
Employees with Dan Curtiss as Subpanel Manager											
Supervisor Name	Office Symbol	Employee Name	Previous OCS	Current OCS	Expected OCS	Problem Solving	Teamwork/ Cooperation	Customer Relations	Leadership/ Supervision	Communication	Resource Management
Chris Babbitt	AMC/LH	Danielle Hoang	77	18 (Comp.)	17	9	24	16	22	22	17
Helen Gonzalez	AMC/LHACB	Richard Quarles	N/A	79 (Comp.)	74	78	87	86	66	76	78
John Iverson	AMC/LHADA	Tammy Stewart	N/A	78 (Comp.)	74	73	80	62	94	73	84
John Iverson	AMC/LHADB	Vincent Udell	N/A	77 (Comp.)	74	85	85	74	78	70	71
John Iverson	AMC/LHADC	Zane Yates	N/A	81 (Comp.)	74	75	71	78	83	95	81
Peter Olson	AMC/LH	Adam Appleton	N/A	0 (Incomp.)	70						
Peter Olson	AMC/LH	Hershel Hummer	N/A	73 (Comp.)	73	79	73	65	74	75	72
Peter Olson	AMC/LH	Mark Mucker	62	75 (Comp.)	72	81	67	71	78	72	78

[Back](#)

Figure 8-12: Level 2 Supervisor Appraisal Status Employee Details

8.3 Reports

Click “Reports” in the Pay Pool Manager Menu of the navigation bar to display the Pay Pool Manager Reports menu.

CAS2Net displays the following report options for the Pay Pool Manager.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Appraisal Form Parts I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Appraisal Status Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor



Figure 8-13: Pay Pool Manager Reports Menu

Refer to Section “11.2 Supervisor Reports” for samples of each report.

8.4 eDocuments - CAS2Net Document Repository

The CAS2Net Document Repository is the database collection of digitally signed Annual Appraisal reports stored by employee by fiscal cycle.

When end of cycle processes are complete and Annual Appraisals have been approved, both the 1st Level Supervisor and the employee will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository. Since higher level supervisors and managers may rate or review Annual Appraisals for subordinate employees, virtually any CAS2Net user group above 1st Level Supervisor may also need to sign Annual Appraisals in the CAS2Net Document Repository.

Reference section “12.0 CAS2Net Document Repository (eDocuments)” in this user guide for an overview of the CAS2Net Document Repository content and functionality for all CAS2Net users.

9. PAY POOL ADMINISTRATOR

This section provides guidance for the CAS2Net Pay Pool Administrator to monitor the progress of appraisal activities for employees in the assigned pay pool and utilize CAS2Net online tools to perform day to day pay pool administration.

The following options appear in the Pay Pool Administrator Menu of the navigation bar after you have successfully logged in: **Welcome**, **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Offline Interface**, and **Pay Pool Notices**, and **eDocuments**.

- **Welcome** displays the CAS2Net welcome screen.
- **Appraisal Status and Lock** summarizes the appraisal status of employees in the assigned pay pool by supervisor level; provides the capability to drill down by supervisor to list employee details; and locks or unlocks appraisals by sub-panel manager or for the entire pay pool.
- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.
- **Data Maintenance** provides maintenance tools for creating or updating employee records; supports assignment of one or more employees to the Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, or Pay Pool Manager of your assigned pay pool; provides the capability to assign one or more supervisors to an employee in your assigned pay pool.
- The **Offline Interface** option provides tools for selecting a pay pool or sub-panel employee data file to “Download Employee Data” or “Upload Employee Data”.
- The **Pay Pool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.
- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports for your subordinates. CAS2Net enables the Level 1 Supervisor to upload signed documents on behalf of others and make necessary corrections.

If the Pay Pool Administrator is also a “demo” employee, then the following “Employee Menu” options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, and Employee **Reports**.

Refer to Section “4. Employee” for information relating to the Employee Menu features.

When the Pay Pool Administrator has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Pay Pool Administrator Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**. These features are detailed in Section “5. Level 1 Supervisor”.

9.1 Appraisal Status and Lock

The Appraisal Status and Lock web page provides tools to approve and lock appraisals by Subpanel or Pay Pool Managers. Locking the scores prevents incidental updates after end of cycle activities have commenced.

Appraisal Status and Lock

Grouped by Paypool Manager

Manager	Emp Count	Appr Complete	Avg Delta OCS	Std Dev	Lock
(not specified)	5	0	N/A	N/A	
Bob Arnold	46	2	11.5	0.71	
Sam Battista	1	0	N/A	N/A	

There are employees with incomplete appraisals. OFF

Grouped by Subpanel Manager

Manager	Emp Count	Appr Complete	Avg Delta OCS	Std Dev	Lock
(not specified)	3	0	N/A	N/A	<input type="checkbox"/> OFF
Chris Babbitt	47	2	11.5	0.71	<input type="checkbox"/> OFF
Helen Gonzalez	1	0	N/A	N/A	<input type="checkbox"/> OFF
Tony Hoang	1	0	N/A	N/A	<input type="checkbox"/> OFF

Grouped by First Level Supervisor

Supervisor	Emp Count	Appraisals Complete	Avg Delta OCS	Std Dev
(not specified)	4	0	N/A	N/A
Chris Babbitt	4	0	N/A	N/A
Dan Curtiss	2	0	N/A	N/A
Eileen Daniels	5	0	N/A	N/A
Francis Evans	1	0	N/A	N/A
George Fites	3	0	N/A	N/A
Helen Gonzalez	2	0	N/A	N/A
Ike Hansen	8	1	12.0	N/A
John Iverson	3	0	N/A	N/A
Margaret Manager	1	0	N/A	N/A
Nancy Michelson	2	0	N/A	N/A
Peter Olson	3	0	N/A	N/A
Richard Quarles	4	1	11.0	N/A
Tammy Stewart	3	0	N/A	N/A
Vincent Udell	4	0	N/A	N/A
Zane Yatey	3	0	N/A	N/A

The information contained herein is covered by the Privacy Act of 1974.

Figure 9-1: Pay Pool Administrator - Appraisal Status and Lock

Preliminary and final scores must be complete in order to approve the appraisal for pay pool review.

The “Appraisal Status and Lock” summary page lists pay pool status information in three sets: by Pay Pool Manager, by Sub-Panel Manager (2nd Level Supervisor), and by 1st Level Supervisor. As long as corresponding employee appraisal scores are complete, appraisals can be locked at the Sub-Panel Manager level or for the entire pay pool.

The supervisor name is a hyperlink to drill down to the 1st Level Supervisor list or the detail page listing subordinate employees. Employee detail columns include (1st Level) supervisor name, (pay pool) office symbol, employee name, previous OCS, current OCS, expected OCS, and individual scores by each performance factor.

9.2 Reports

Click “Reports” in the Pay Pool Administrator Menu of the navigation bar to display the Pay Pool Administrator Reports menu.

CAS2Net displays the following report options Pay Pool Administrator.

- Contribution Planning – Single Employee
- Contribution Planning – All Employees
- Additional Feedback – Single Employee
- Additional Feedback – All Employees
- Appraisal Form Parts I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor



Figure 9-2: Pay Pool Administrator Reports Menu

Refer to Section “11.2 Supervisor Reports” for samples of each report.

EMPLOYEE ROSTER

Click “Employee Roster” to generate a list of employees in the pay pool.



Figure 9-3: Employee Roster Report Generation Options

Since the Pay Pool Administrator’s primary duty is to review and update the basic personnel data on all AcqDemo employees in your pay pool, the first thing you may choose to do is click on the Reports link on the main menu to bring up the Pay Pool Administrator report menu.

After clicking on Employee Roster, and choosing a sort order (name or office symbol), click the” Generate” button to launch Adobe Acrobat Reader with a roster of all AcqDemo employees in your pay pool. If you do not have Adobe Acrobat Reader on your computer, there is a button that will take you to Adobe’s website from which you can download the reader.

ID	Last Name	First Name	MI	Suffix	SSN (last 4)	Office Symbol	Presumptive Status	Retain Pay	Career Path	BB Level	Occ Series	Base Salary	Locality Code	CCPO	Prev OCS	Start Date
2612	Appleton	Adam			4444	AMC/LH	None	N	NH	3	1550	\$72,000	80	AS	n/a	01-JAN-11
43	Arndt	Aaron			0138	AMC/LHXTA	Circum (recertify)	N	NK	2	0322	\$35,804	41	9L	36	01-FEB-99
15	Babbitt	Chris			0912	AMC/LHXSA	None	N	NH	3	0803	\$76,725	41	9L	n/a	24-OCT-00
1843	Burns	Barry			6289	AMC/LHACA	None	N	NH	2	1515	\$46,401	41	9L	n/a	12-AUG-01
44	Butler	Bryce			0219	AMC/LHXTA	None	N	NH	4	0025	\$129,517	41	9L	n/a	01-FEB-99
45	Cavasos	Carmen			7986	AMC/LHXTB	None	N	NH	2	0246	\$46,401	41	9L	n/a	01-FEB-99
21	Celon	Connie			4913	AMC/LHACA	Time	N	NH	3	0334	\$76,725	41	9L	74	01-AUG-03
4	Curtiss	Dan			9047	AMC/LHA	None	N	NH	4	0830	\$107,107	41	9L	n/a	01-FEB-99
46	Dancy	Dyanne			0943	AMC/LHXTB	None	N	NK	1	0322	\$24,837	41	9L	n/a	01-FEB-99
22	Donaldson	Dennis			3941	AMC/LHACB	None	N	NK	2	0318	\$35,804	41	9L	n/a	01-FEB-99
47	Emerson	Erica			8834	AMC/LHXTB	Circum (recertify)	N	NH	2	0341	\$46,401	41	9L	50	01-FEB-99
23	Evans	Erin			3175	AMC/LHACB	None	N	NH	3	0830	\$76,725	41	9L	n/a	01-FEB-99
5	Evans	Francis			9045	AMC/LHX	None	N	NH	4	0830	\$107,107	41	9L	n/a	01-FEB-99
24	Farnsworth	Fred			7422	AMC/LHACB	None	N	NH	2	0830	\$46,401	41	9L	n/a	01-FEB-99
17	Files	George			8173	AMC/LHXTA	None	N	NH	3	0896	\$76,725	41	9L	n/a	01-FEB-99
2	Freeman	Francis			9153	AMC/LH	None	Y	NK	2	0318	\$35,804	41	9L	0	01-FEB-99
3	Garfield	George			8079	AMC/LH	None	N	NJ	4	0856	\$76,725	41	9L	n/a	01-FEB-99
6	Gonzalez	Helen			0075	AMC/LHAC	None	N	NH	4	0340	\$107,107	41	9L	n/a	15-MAY-03
25	Grimes	Garth			5297	AMC/LHACB	None	N	NH	2	0850	\$46,401	41	9L	n/a	01-FEB-99
18	Hansen	Ike			3651	AMC/LHXTB	None	N	NH	3	0830	\$76,725	41	9L	n/a	01-FEB-99
26	Harris	Henry			3813	AMC/LHADA	None	N	NH	2	0830	\$46,401	41	9L	n/a	01-FEB-99
2571	Hoang	Andrew			1234	AMC/LH	None	N	NJ	1	0019	\$24,837	80	7X	n/a	26-JAN-11
2572	Hoang	Danielle			1234	AMC/LH	None	N	NH	1	0025	\$24,837	7X	77	07-JUL-10	
2574	Hoang	Eric			6914	AMC/LH	None	N	NJ	1	0332	\$24,837	7X	n/a	01-JUN-11	
2611	Hummer	Hershel			4555	AMC/LH	None	N	NH	3	0893	\$76,000	80	AS	n/a	01-JAN-11
27	Irinski	Ivan			6297	AMC/LHADA	None	N	NK	3	0085	\$48,568	41	9L	n/a	01-FEB-99
7	Iverson	John			1132	AMC/LHAD	None	N	NH	4	0830	\$107,107	41	9L	n/a	01-FEB-99
28	Jerris	Jane			8347	AMC/LHADA	None	N	NH	3	0830	\$76,725	41	9L	n/a	01-FEB-99
29	Karnes	Keith			2312	AMC/LHADB	None	N	NK	2	0085	\$35,804	41	9L	n/a	01-FEB-99
30	Lawrence	Lance			8032	AMC/LHADB	None	N	NH	3	0830	\$76,725	41	9L	n/a	01-FEB-99
31	Martinez	Mary			2531	AMC/LHADB	None	N	NH	3	0830	\$76,725	41	9L	n/a	01-FEB-99
1472	Michelson	Nancy			0710	AMC/LHXT	None	N	NH	4	0830	\$107,107	41	9L	n/a	29-SEP-00
2613	Mucker	Mark			5555	AMC/LH	None	N	NH	3	0505	\$75,000	80	AS	62	10-OCT-11

Figure 9-4: Employee Roster Report

The employee roster lists the following information for each employee:

- *ID number (a number assigned by the database for internal use)*
- *Last Name*
- *First Name*
- *Middle Initial*
- *Suffix*
- *SSAN*
- *Office Symbol*
- *Presumptive Status*
- *Retained Pay Status*
- *Career Path*
- *Broadband*
- *Occupational Series*
- *Current Base Pay*
- *Locality Pay Area Code*
- *Servicing Civilian Personnel Office Code*
- *Previous OCS*
- *Appraisal Period Start Date*

You can print the roster by clicking the printer icon in Adobe Acrobat Reader. By comparing the printed roster with other rosters and listings provided by your personnel office or maintained within your pay pool, you can annotate errors and omissions on your pay pool database roster. Once you have marked up the roster to reflect the actual status of every AcqDemo employee in your pay pool, you may use the Data Maintenance module to update the CAS2Net database.

9.3 Data Maintenance

The Data Maintenance module supports modifications to employee attributes and supervisor relationships on the CAS2Net database.

Clicking on the Data Maintenance link in the left side navigation bar of the Main Menu displays the Employee Maintenance Menu.



Figure 9-5: Data Maintenance – Employee Maintenance Menu

Employee Maintenance Menu options include:

- Modify/Delete employee record using query form
- Modify/Delete employee record using quick pick list
- Insert New Employee Record
- Assign Supervisors to an Employee
- Assign Employees to a Supervisor
- Replace Supervisor Assignments
- Replace PAS Code

9.3.1 Create Employee Record

CAS2Net provides two navigation paths to the “Add an Employee Record” web page.

1. Select “Insert New Employee Record” from the Data Maintenance “Employee Maintenance Menu”
2. Click the “Add an Employee Record” link on the “Employee Picklists by Career Path” screen.

The “Add an Employee Record” page contains fields for all data elements stored in the database. Four data elements are mandatory for the creation of a new non-demo record (SSN, first name, last name, and occupational series) – the labels on these fields are highlighted in yellow.

When all data is entered, scroll to the bottom of the screen and click the “Add” button. The only non-demo employees who need to be entered into the database are CAS2Net users: Pay Pool Administrators and pay pool superusers.

The Pay Pool Administrator would use this function to create records for employees joining the pay pool during the post-cycle period, which runs from 1 October through early January.

ADD EMPLOYEE RECORD WEB FORM

Civilian Acquisition Workforce Personnel
Demonstration Project; Department of Defense (DCO)

Acq
Demo

Add an Employee Record

Enter values for a new employee record.
Required fields for non-demo employees are colored green and marked with an asterisk (*).
All fields except for middle initial, suffix, and end date are required for demo employee records.

Part 1 - Complete this section for all Demo and Non-Demo employees

Prefix:

First Name: *

Middle Initial:

Last Name: *

Suffix:

SSN: *

Part 2: Complete this section for all Demo employees

Demo: * Demo

Start Date: (mm/dd/yyyy)?

End Date: (mm/dd/yyyy)?

Basic Pay:

Retained Pay Status: Retained Pay

Presumptive Rating Status: None
 Due to time
 Due to circumstance (recertify)
 Due to circumstance (expected)

Last OCS:

Post-cycle Activity: None
 Temporary Promotion
 Permanent Promotion
 Demotion

What to do if employee is...
promoted?
leaving?
joining?

CCPO Code:

Locality Code:

Service: Air Force
 Army
 Marine Corp
 Navy
 Office of the Secretary of Defense

Supervisors: Level 1 Supervisor:
 Level 2 Supervisor:
 Sub-Panel Meeting:
 Paypool Manager:
 Center Senior Functional:

Insert the New Employee Record first. Then the link to supervisor assignments will be enabled.
[Assign Supervisors]

Career Path: N/A-Not Assigned
 NH-Business Management and Technical Management Professional
 NJ-Technical Management Support
 NK-Administrative Support

Broadband Level: Not Assigned
 Level 1
 Level 2
 Level 3
 Level 4

Organization: Paypool Code: *
PAS Code (Air Force only):
Office Symbol:

Series:

Part 3: Complete this section for all employees requiring CAS2Net user accounts
 "CAS2Net Access" field should be checked.

CAS2Net Access: * CAS2Net Access

EDIPI: *

Group: * Employee

[Data Maintenance Menu] [Back to Home Page]

The information contained herein is covered by the Privacy Act of 1974.

Figure 9-6: Add Employee Record Web Form

9.3.2 *Modify/Delete Employee Record*

CAS2Net offers two menu items for locating the employee record to be modified.

The first option, “Modify/Delete employee record using query form”, lets the Pay Pool Administrator enter search criteria to locate employees with given attributes.

The second, “Modify/Delete employee using quick pick list”, lets the Pay Pool Administrator search for employees by career paths.

Using Query Form: This method takes you through a query screen in which you can enter information about the employee record(s) you want to modify or delete – entering SSN is the most direct way to get exactly the record you want. If you enter more general criteria, such as broadband and career path, you will get a list of all employees in the database matching those criteria. You may use the % symbol as a wild card in your queries.

After you enter the query criteria, scroll to the bottom of the screen and select the order in which you want the records sorted (optional), and then click the “Find” button. The query form is shown on the following page.

SEARCH EMPLOYEE QUERY FORM

Civilian Acquisition Workforce Personnel
 Demonstration Project, Department of Defense (DOD)

You are acting as Francis Freeman
[Revert](#) | [Change Session](#) | [Logout](#)

Acq
Demo

Pay Pool Administrator Menu

Welcome

Appraisal Status and Lock

Reports

Data Maintenance

Offline Interface

Pay Pool Notices

eDocuments

Look for Employee(s)

In text fields you may use the % symbol as a wildcard. Text fields are not case sensitive.

Select Group:

Active Only
 Archived Only
 All

Person ID:

First Name:

Middle Initial:

Last Name:

Social Security Num:

Demo:

All
 Demo
 Non-Demo

Presumptive Rating Status:

All
 None
 Due to time
 Due to circumstance (recertify)
 Due to circumstance (expected)

Servicing CPO:

Service:

Broadband Level:

All
 Not Assigned
 Level 1
 Level 2
 Level 3
 Level 4

Organization:

Pay Pool Code:

Office Symbol: (Leave blank for all)

Career Path:

All
 Not Assigned
 Business Management and Technical Management Professional
 Technical Management Support
 Administrative Support

Series: (Leave blank for all)

Login Name:

Group:

All
 Employee
 Supervisor I
 Sub-Panel Manager
 Pay Pool Manager
 Superuser
 Pay Pool Administrator
 RT Online Viewer
 RT User
 RT Superuser
 Supervisor II

Retained Pay Status:

All
 Yes
 No

[\[Add an Employee Record\]](#) [\[Data Maintenance Menu\]](#)
[\[Back to Home Page\]](#)

Figure 9-7: Search Employee Record Query Form

Enter one or more search criteria and click “Find”.

The query produces a list of records that match the query criteria as shown below. The records are displayed in groups of ten. You can then select a specific employee from the resulting list (shown below) by clicking on the employee’s ID link.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Francis Freeman
[Revert](#) | [Change Session](#) | [Logout](#)

Employee(s) Matching Criteria

Query criteria: (active records only), Last Name: hoang [Requery](#) [New Query](#)

<< first < prev 1 next > last >> Show 10 records per page

ID	SSN	Arch	Name	Home Org	Career Path	Level	CPO	Series	Salary	Group	Service
2571	-1234	N	Hoang, Andrew	AMC/LH	NJ	I	7X	0019	\$0	Employee	OSD
2572	-1234		Hoang, Danielle		NH	III	7X	0025	\$0	Employee	OSD
2574	-6914	N	Hoang, Eric	AMC/LH	NJ	I	7X	0332	\$0	Superuser	OSD
2573	-6915	N	Hoang, Tony		N/A	0			\$0	Full Access User	

<< first < prev 1 next > last >> Show 10 records per page

[\[Add an Employee Record\]](#) [\[Data Maintenance Menu\]](#)

Figure 9-8: Search Employee Record Query Results

Using quick pick list: The second search option, “Modify/Delete employee using quick pick list”, lets the Pay Pool Administrator search for employees by career paths.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Francis Freeman
[Revert](#) | [Change Session](#) | [Logout](#)

Employee Picklists By Career Path

N/A - Not Assigned

NH - Business Management and Technical Management Professional

NJ - Technical Management Support

NK - Administrative Support

[\[Add an Employee Record\]](#) [\[Data Maintenance Menu\]](#) [\[Back to Home Page\]](#)

Figure 9-9: Modify/Delete Employee Record Using Quick Pick List

This method takes you through a screen to pick employees by selecting from dropdown lists from each career path. Select an employee from one of the dropdown lists then click on the "submit" button.

When an employee is selected from either search screen, CAS2Net displays the Employee Detail form for updating or deleting AcqDemo employee information.

EMPLOYEE DETAIL WEB FORM

Employee Detail

BOTTOM

Part 1 - Complete this section for all Demo and Non-Demo employees

ID: 2612
 Prefix:
 First Name: Adam
 Middle Initial: A
 Last Name: Appleton
 Suffix:
 SSN: 222-11-4445
 EMail Address:

Part 2: Complete this section for all Demo employees

In Demo: Demo
 Start Date: 01/01/2011 (mm/dd/yyyy) ?
 End Date: (mm/dd/yyyy)?
 Basic Pay: 0
 Retained Pay Status:
 Presumptive Rating Status: None
 Due to time
 Due to circumstance (expected)
 Due to circumstance (recertify)
 Last OCS: 73
 Post-Cycle Activity: None
 Temporary Promotion
 Permanent Promotion
 Demotion
 What to do if employee is... promoted? leaving? joining?
 CCPO Code: AS - FORT BELVOIR FT BELVOIR VA 22060
 Locality Code: DCB Wash DC/Baltimore 24.22
 Service: Air Force
 Army
 Marine Corp
 Navy
 Office of the Secretary of Defense
 Supervisors: **Level 1 Supervisor:** George Fites
Level 2 Supervisor: Dan Curtiss
Sub-Panel Meeting: Francis Evans
Pay Pool Manager: Bob Arnold
Center Senior Functional: George Fites
 Career Path: N/A-Not Assigned
 NH-Business Management and Technical Management Professional
 NJ-Technical Management Support
 NK-Administrative Support
 Broadband Level: Not Assigned
 Level 1
 Level 2
 Level 3
 Level 4
 Series: LOV 1550 COMPUTER SCIENCE
 Organization: **Pay Pool Code:** AMC/LH
PAS Code (Air Force only): 12345678
Office Symbol: AMC/LHA LOV

Part 3: Complete this section for all employees requiring CAS2Net user accounts

CAS2Net Access: CAS2Net Access
 EDIPI:
 Group: Employee

Part 4: Mid-Point Review Unlock

Status: Save Date: 05/08/2015
 Conducted: 05/08/2015
 Released: Y
 Unlock Mid-Point Review

TOP

Figure 9-10: Employee Detail Web Form

You will have to scroll up and down to see all of the data fields. The following data elements are open for direct entry or modification:

Part 1: Complete this section for all Demo and Non-Demo employees

Prefix

First Name

Middle Initial

Last Name

Suffix

SSN

Part 2: Complete this section for all Demo employees

In Demo checkbox (check to indicate “Demo” employee status)

Start Date (date entered Acq Demo – mm/dd/yyyy selection via **Calendar** button)

End Date (date departed Acq Demo – mm/dd/yyyy updated via **Calendar**, **View Loss** buttons)

Basic Pay text field (for current fiscal year; does NOT include locality pay)

Retained Pay Status checkbox

Presumptive Rating Status radio buttons –

None, Due to time, Due to circumstance (expected), Due to circumstance (recertify)

Last OCS (if previous year OCS is available)

Post-Cycle Activity radio buttons and helpful hint links –

None, Temporary Promotion, Permanent Promotion, Demotion

What to do if employee is ... **promoted?**, **leaving?**, **joining?**

CCPO Code dropdown list

Locality Code dropdown list

Service radio buttons –

Air Force, Army, Marine Corp, Navy, Office of the Secretary of Defense

Supervisors name fields (“current year” supervisors entered via **Assign Supervisors** link) and list of subordinates –

Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Meeting, Pay pool Manager, Center Senior Functional

Note. Center Senior Functional is a horizontal managerial review role by functional area rather than a vertical organizational hierarchy. A CSF reviews appraisals of assigned employees only through reports.

Click the **Supervisor List** button to see supervised employees

Career Path radio buttons –

N/A-Not Assigned, NH-Business Management and Technical Management

Professional, NJ-Technical Management Support, NK-Administrative Support

Broadband Level radio buttons –

Not Assigned, Level 1, Level 2, Level 3, Level

Series (click **LOV** to select Occupational Series from “list of values” popup window)

Organization –

Paypool Code dropdown list

PAS Code dropdown list (for Air Force only)

Office Symbol dropdown list

Part 3: Complete this section for all employees requiring CAS2Net user accounts

CAS2Net Access checkbox (check to authorize access to CAS2Net

EDIPI text field (see section 9.3.5 Create Supervisory Structure; Obtain CAC

EDIPI)

Group dropdown list

Part 4: Mid-Point Review Unlock

Status information, requested action checkbox –

Save Date, Conducted, Released

Unlock Mid-Point Review checkbox

Part 1: Complete this section for all Demo and Non-Demo employees

Enter or update employee name and title as appropriate.

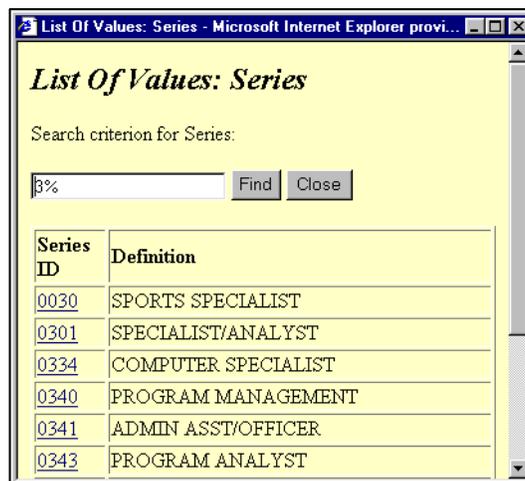
Part 2: Complete this section for all Demo employees

Enter or update employee attributes as appropriate.

Supervisor Names, Office Symbol, and Occupational Series (Number and Title) may be changed by either typing in a value or selecting from a list of values.

Click the Series LOV link to select from the list of Occupational Series values. New values entered for Supervisor Names and Office Symbol will be added to the list of values once the employee record is updated.

Given the long list of Occupational Series, you will be prompted to enter a search criterion when you click on the LOV link for Series. You may use the % symbol as a wild card in your search. For example, entering "3%" for the search criterion will return all Series with a 3 in it (see below). You may update the search criterion and click the "Find" button or click on a Series ID link to select the



value.

Figure 9-11: Occupational Series “List of Values”

Part 3: Complete this section for all employees requiring CAS2Net user accounts

If the employee’s login information was not prepopulated during the DCPDS data load –

- Check “CAS2Net Access” checkbox to enable access to CAS2Net.
- Enter the employee’s EDIPI information. Section 9.3.5 Create Supervisory Structure; Obtain CAC EDIPI provides instructions for retrieving the employee’s EDIPI information.
- Select “Employee” from the dropdown list.

Part 4: Mid-Point Review Unlock

This feature enables the Pay Pool Administrator to “reopen” a completed Mid-Point Review and reset the status to “In Progress”. See also section “Level 1 Supervisor”, sub-section “Reopen Mid-Point Review”.

Check the “Unlock Mid-Point Review” box and then click “Update” to clear the method of communication and date conducted from the employee’s Mid-Point Review to enable updates to the supervisor assessment text.

Note. To enable the employee to update his Mid-Point Review Self-Assessment, the supervisor will need to open the Mid-Point Review form, uncheck “Lock Employee Self-Assessment” and click “Save”.

When changes are complete, scroll to the bottom of the screen and click the “Update” button to save the changes to the CAS2Net database. If you want to delete the employee from the database, click the “Delete” button. If you have made changes, but want to revert back to the previous values (before clicking the “Update” button), click the “Revert” button.

Click “Close” to return to the previous page. Unlike other screens in CAS2Net, you cannot “Back” out of the Employee Detail screen. To exit the screen and return to the list of employees, click the “Close” button at the bottom of the screen.

9.3.3 Transfer Pay Pool

To move an employee from one pay pool to another, use the “Transfer Pay Pool” feature. The pay pool administrator of the employee’s current pay pool moves the employee record to a special “(transfer)” pay pool. Employee records in the “(transfer)” pay pool are visible to all pay pool administrators. The administrator of the employee’s new pay pool then retrieves the employee record from the “(transfer)” pay pool.

Note: Special above-pay pool administrators such as All Army, All Air Force, MARCORSSYSCOM and others have access to multiple pay pools and can directly move employee records among pay pools they have access to.

THE EMPLOYEE’S CURRENT PAY POOL ADMINISTRATOR:

Start by clicking “Data Maintenance” from the navigation bar.



Figure 9-12: Transfer Pay Pool – Data Maintenance Menu

Select the “Modify/Delete employee record using query form” link.

CAS2Net refreshes the screen to display the “Look for Employee(s)” search screen.

Figure 9-13: Transfer Pay Pool – Employee Search Query Form

Enter the name of the employee you want to find—or leave blank to retrieve all employees in the pay pool.

Click the “Find” button (located at the top and/or bottom of the screen).



Figure 9-14: Transfer Pay Pool – Employee Search “Find” buttons

CAS2Net refreshes the screen to display a list of employees in the pay pool. Select the employee to modify by clicking anywhere in the row.

If you entered a name to search for, only people with that name will be displayed.

Employee(s) Matching Criteria												
Query criteria: (active records only), Last Name: artis											Query	New Query
<< first < prev 1 next > last >> Show 10 records per page												
ID	SSN	Arch	Name	Home Org	Career Path	Level	CPO	Series	Salary	Group	Service	
19	-3720		Artis, Amy	AMC/LHXTC	NH	II	9L	0318	\$0	Employee	AR	
<< first < prev 1 next > last >> Show 10 records per page												

Figure 9-15: Transfer Pay Pool – Search Results

CAS2Net opens a new internet browser window to display the Employee Detail Screen for the select employee.

Employee Detail
BOTTOM

Part 1 - Complete this section for all Demo and Non-Demo employees

ID: 19
 Prefix:
 First Name: Amy
 Middle Initial:
 Last Name: Artis
 Suffix:
 SSN: 298-10-3720
 EMail Address:: garfieldg@mail.mil

Part 2: Complete this section for all Demo employees

In Demo: Demo
 Start Date: 02/01/1999 (mm/dd/yyyy) ?
 End Date: (mm/dd/yyyy)?
 Basic Pay: 0

[View Loss](#)

Figure 9-16: Transfer Pay Pool – Employee Detail Input

Scroll down to the “Organization” section of the Employee Detail Form and select the “Pay Pool Code” dropdown list.

Choose the “(Transfer)” pay pool to move the employee out of the current pay pool.

Employee Detail

Part 1 - Complete this section for all Demo and Non-Demo employees

Part 2: Complete this section for all Demo employees

Organization: Paypool Code: AMC/LH
 PAS Code (Air Force only):
 Office Symbol: AMC/LHXTA LOV

Figure 9-17: Transfer Pay Pool – “To” Pay Pool Selection

Click the “Update” button located at the bottom of the screen.

CAS2Net displays a message at the top of the Employee Detail screen indicating successful updates.

Click the “Close” button at the bottom of the Employee Detail Screen.

Tip: Generate the Employee Roster report from time to time to check your progress in cleaning up the pay pool database.

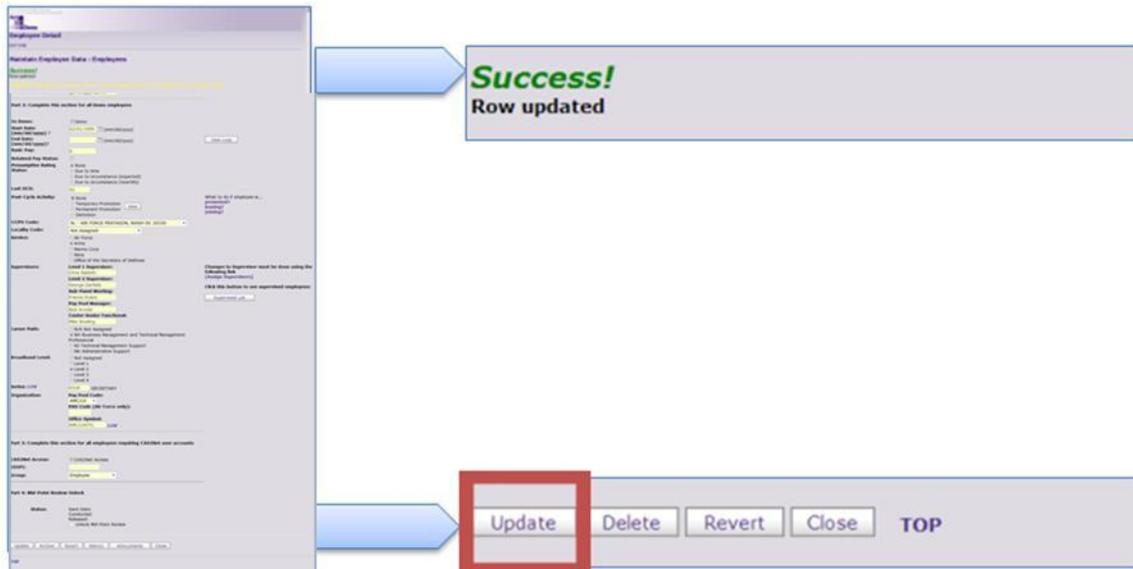


Figure 9-18: Transfer Pay Pool – Employee Detail Update

THE EMPLOYEE’S NEW PAY POOL ADMINISTRATOR:

Start by clicking “Data Maintenance” from the navigation bar.



Figure 9-19: Transfer Pay Pool – Data Maintenance Menu

Select the “Modify/Delete employee record using query form” link.

CAS2Net refreshes the screen to display the “Look for Employee(s)” search screen.

Figure 9-20: Transfer Pay Pool – Employee Search Query Form

Enter the name of the employee you want to find—or leave blank to retrieve all employees in the Transfer Pay Pool.

Scroll to the “Organization” section of the form and select “(transfer)” from the “Pay Pool Code” dropdown list.

Figure 9-21: Transfer Pay Pool – Search by “From” Pay Pool

Click the “Find” button (located at the top and/or bottom of the screen).

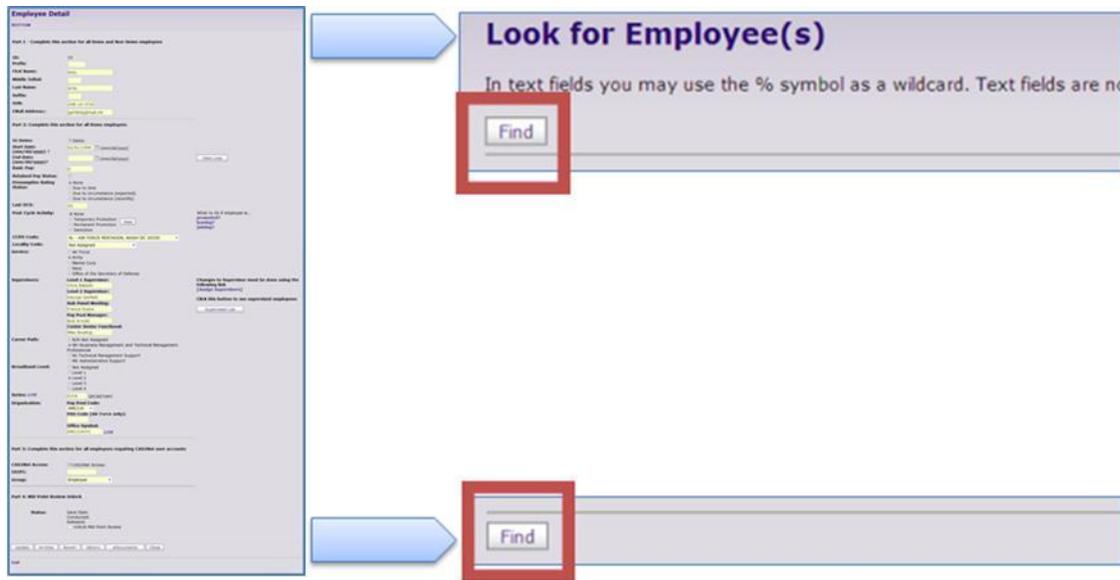


Figure 9-22: Transfer Pay Pool – Employee Search “Find” buttons

CAS2Net refreshes the screen to display a list of employees in the transfer pay pool. (This means the employee is waiting to be put into a pay pool and be given supervisor assignments)

Select an employee you would like to modify by clicking on their “ID” number.

If you entered a name to search for, only people with that name will be displayed.

Employee(s) Matching Criteria											
Query criteria: (active records only), Last Name: artis										Requery	New Query
<< first < prev 1 next > last >> Show 10 records per page											
ID	SSN	Arch	Name	Home Org	Career Path	Level	CPO	Series	Salary	Group	Service
19	-3720		Artis, Amy	AMC/LHXTC	NH	II	9L	0318	\$0	Employee	AR
<< first < prev 1 next > last >> Show 10 records per page											

Figure 9-23: Transfer Pay Pool – Search Results

CAS2Net opens a new internet browser window to display the Employee Detail Screen for the select employee.

Employee Detail

BOTTOM

Part 1 - Complete this section for all Demo and Non-Demo employees

ID: 19

Prefix:

First Name: Amy

Middle Initial:

Last Name: Artis

Suffix:

SSN: 298-10-3720

EMail Address:: garfieldg@mail.mil

Part 2: Complete this section for all Demo employees

In Demo: Demo

Start Date: (mm/dd/yyyy) ? 02/01/1999 (mm/dd/yyyy)

End Date: (mm/dd/yyyy)? (mm/dd/yyyy)

Basic Pay: 0

Figure 9-24: Transfer Pay Pool – Employee Detail Input

Scroll down to the “Organization” section of the Employee Detail Form and select the “Pay Pool Code” dropdown list.

Choose the name of the pay pool you want to move the selected employee to.

Employee Detail

Part 1 - Complete this section for all Demo and Non-Demo employees

Part 2: Complete this section for all Demo employees

Part 3: Complete this section for all employees requiring additional user actions

Part 4: Add/Modify/Remove Status

➔

Organization:

Paypool Code: AMC/LH

PAS Code (Air Force only):

Office Symbol: AMC/LHXTA LOV

Figure 9-25: Transfer Pay Pool – “To” Pay Pool Selection

Click the “Update” button located at the bottom of the screen.

CAS2Net displays a message at the top of the Employee Detail screen indicating successful updates.

Click the “Close” button at the bottom of the Employee Detail Screen.

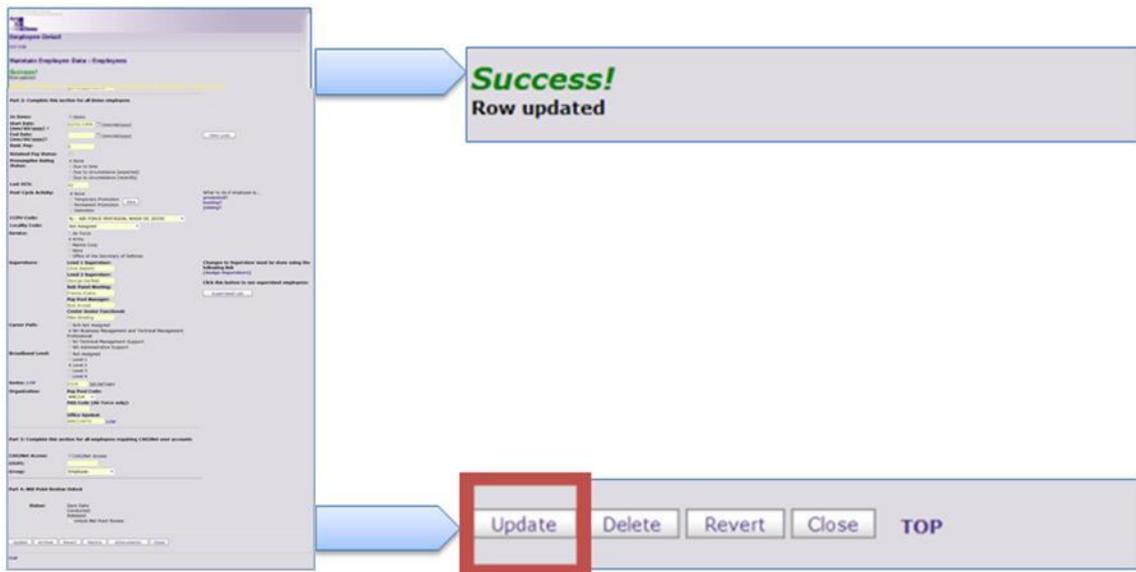


Figure 9-26: Transfer Pay Pool – Employee Detail Update

Tip: Generate the Employee Roster report from time to time to check your progress in cleaning up the pay pool database.

9.3.4 Record Post-Cycle Activities

Another very important function of the Pay Pool Administrator is recording post-cycle activities. Post-cycle activities include all gains, losses, and temporary and permanent promotions occurring between 1 October and the start of the new pay year in early January. These activities are recorded using the Data Maintenance – Employee Maintenance path from the Main Menu.

Post-Cycle Activities are recorded in Part II of the Employee Detail web page.

Post-Cycle Activity:

None
 Temporary Promotion
 Permanent Promotion
 Demotion

[View](#)

What to do if employee is...
[promoted?](#)
[leaving?](#)
[joining?](#)

Figure 9-27: “Post-Cycle Activity” in Part II of Employee Detail Screen

To the right of the “Post-Cycle Activity” radio buttons are links to popup windows that provide instructions for handling three common situations that require Post-Cycle Activity settings.

POST-CYCLE ACTIVITY GUIDANCE

For online guidance on employee promotions, click [What to do if employee is **promoted?**](#).

When an employee is promoted

1. Employee receives a permanent promotion or demotion between 1 October and the start of the new pay year:

- Do NOT change the employee's broadband level or Basic Pay on the Employee Detail screen. For CCAS purposes, this information must be as of 30 September, even if it changes after that date.

Figure 9-28: What to do if employee is ... promoted?

CAS2Net provides these guidelines to follow when an employee is promoted:

- Employee receives a permanent promotion or demotion between 1 October and the start of the new pay year:
 - Do NOT change the employee's broadband level or Basic Pay on the Employee Detail screen. For CCAS purposes, this information must be as of 30 September, even if it changes after that date.
 - Select the type of action (Permanent or Demotion) under Post-Cycle Activity and click the View button. Enter the required information (effective date, new broadband, new basic pay, new occupational series, and new career path).
 - CAS2Net will automatically ensure that the correct pay adjustment and award are uploaded to DCPDS and will automatically update the employee's information after the start of the new pay year.
- Employee receives a permanent promotion or demotion on or before 30 September:
 - Simply update the relevant information on the Employee Detail screen
- Employee will be serving on a Temporary Promotion at the start of the new pay year, regardless of when that Temporary Promotion started:
 - Do NOT change any information on the Employee Detail screen. This must reflect the employee's permanent broadband and permanent basic pay as of 30 September even if the employee is actually serving in a higher broadband at a higher pay.

- Select the type of action (Temporary) under Post-Cycle Activity and click the View button. Enter the required information (start and end dates, temporary broadband, temporary basic pay, temporary occupational series, and temporary career path).
- CAS2Net will automatically ensure that the correct pay adjustment and award are uploaded to DCPDS.

For online guidance on managing departures, click [What to do if employee is **leaving?**](#).

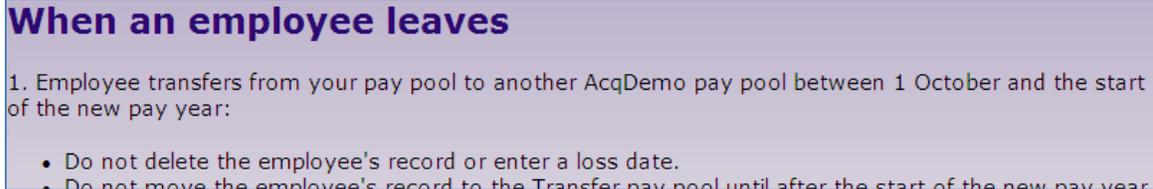


Figure 9-29: What to do if employee is ... leaving?

CAS2Net provides these guidelines to follow when an employee is leaving:

1. Employee transfers from your pay pool to another AcqDemo pay pool between 1 October and the start of the new pay year:
 - Do not delete the employee's record or enter a loss date.
 - Do not move the employee's record to the Transfer pay pool until after the start of the new pay year. The employee will be rated by your pay pool and will receive a salary adjustment and award from your organization.
 - After the start of the new pay year, transfer the employee's record to the Transfer pay pool so the gaining pay pool data maintainer can pick it up and move it to the new pay pool. Notify the gaining data maintainer when this is done.
2. Employee leaves AcqDemo (retirement, separation, transfer to GS position, etc.) between 1 October and the start of the new pay year:
 - Enter the employee's End Date (first day not covered by AcqDemo) on the Employee Detail screen, click the View Loss button, and enter a reason for the loss.
 - Do not delete the employee's record until after the start of the new pay year. Since the employee was in your pay pool on 30 September, he or she must still be rated.
 - After the start of the new pay year, delete the employee's record from CAS2Net.
3. Employee leaves AcqDemo (retirement, separation, transfer to GS position, etc.) before 30 September:
 - Enter the employee's End Date (first day not covered by AcqDemo) on the Employee Detail screen, click the View Loss button, and enter a reason for the loss.
 - Delete the employee's record from CAS2Net.

For online guidance on how to handle new employees, click [What to do if employee is **joining?**](#)

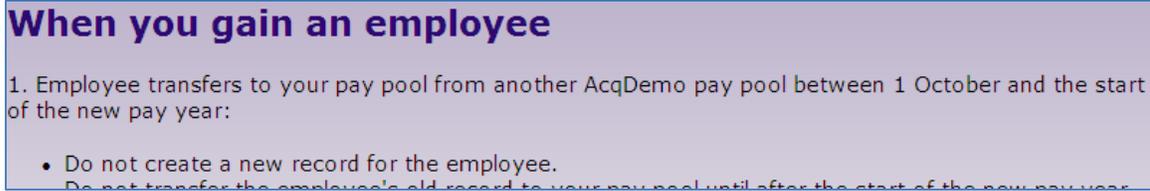


Figure 9-30: What to do if employee is ... joining?

CAS2Net provides these guidelines to follow when an employee is leaving:

1. Employee transfers to your pay pool from another AcqDemo pay pool between 1 October and the start of the new pay year:
 - Do not create a new record for the employee.
 - Do not transfer the employee's old record to your pay pool until after the start of the new pay year. The employee will be rated by his or her previous pay pool and will receive a salary adjustment and award from that organization.
 - After the start of the new pay year, go to the Transfer pay pool and move the employee's record to your pay pool. If the record is not in the transfer pay pool, contact the employee's previous pay pool data maintainer and have them move the record to Transfer so you can pick it up.
2. Employee joins your pay pool from outside AcqDemo (new hire, transfer from GS positions, etc.) any time during the year:
 - Use Insert New Employee Record to add the employee to your CAS2Net database. Enter the employee's first day in AcqDemo as the Start Date. If the employee starts between 1 October and the start of the new pay year, they will not be included in the on-line and offline appraisal and compensation modules of CAS2Net for that cycle. However, CAS2Net will ensure that the employee receives the General Pay Increase.
 - If the employee is entering your pay pool due to a promotion, use the new promotion information at the employee detail page and do not enter a promotion.

POST-CYCLE ACTIVITIES

Post-cycle **losses** are recorded by following Path (1) to the Employee Detail screen and entering an End Date during the post-cycle period for the employee. Click “View Loss” to enter descriptive text.

The screenshot shows a form with two date fields. The first field is labeled "Start Date: (mm/dd/yyyy) ?" and contains the date "02/01/1999" with a "Calendar" button next to it. The second field is labeled "End Date: (mm/dd/yyyy)?" and contains the date "10/12/2012" with a "Calendar" button next to it. To the right of these fields, there is a button labeled "View Loss" which is highlighted with a red rectangular border.

Figure 9-31: Record Post-Cycle “End Date”

The screenshot shows a dialog box with the following content:

- Text: "Please indicate which of the following best reflects what the employee will be doing after leaving AcqDemo."
- Text: "Select the most important one:"
- Dropdown menu: A dropdown menu showing "(null)".
- Text: "If needed: enter explanation for loss"
- Text area: A large empty text area for entering an explanation.
- Buttons: At the bottom, there are two buttons: "Return to Employee Maint" and "Cancel".

Figure 9-32: Record Post-Cycle Loss

Post-cycle **gains** are recorded by following Path (2) and then filling in all of the normal data elements, including a Start Date during the post-cycle period. Note that post-cycle gains and losses are only entered for employees leaving or joining AcqDemo during the post-cycle period. Transfers between pay pools are NOT considered gains or losses.

Post-cycle **promotions** are recorded by following Path (1) to the Employee Detail screen and then selecting the appropriate promotion radio button under “Temp/Perm Promotion”.

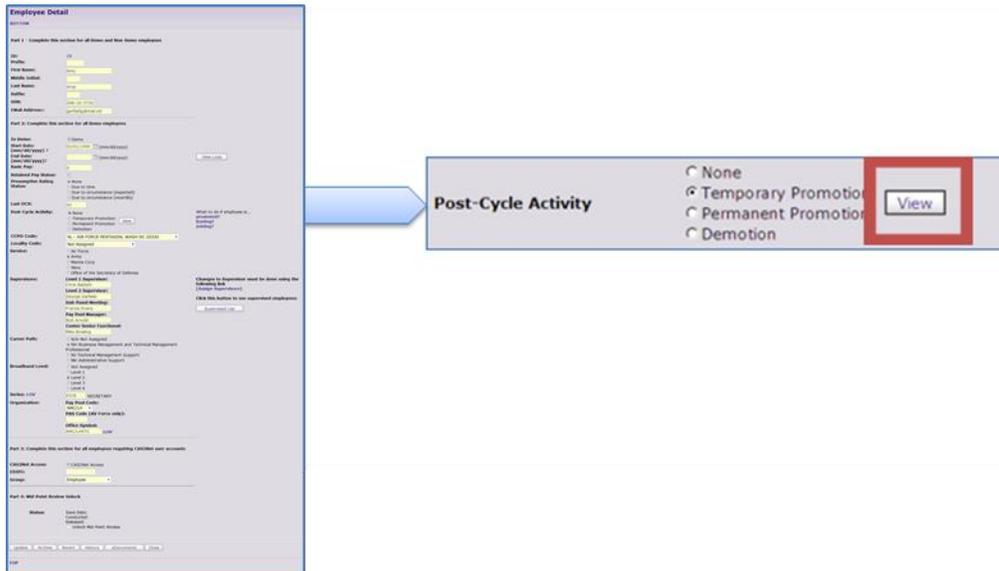


Figure 9-33: Record Post-Cycle Promotion

Once you have selected the type of promotion, click the “View” button and enter the requested information. Don’t forget to save your changes. The post-cycle data form for temporary promotions is shown below.

The image shows the 'Temporary Promotion' web form. It includes the following fields and controls:
 - **BB Level:** (null)
 - **Start Date:** mm/dd/yyyy with a Calendar button
 - **End Date:** mm/dd/yyyy with a Calendar button
 - **New Basic Pay:** 0
 - **Series:** LOV
 - **Career Path:** N/A Not Assigned
 - **Buttons:** Save, Clear, Close
 - **Text:** Changes to Promotion Status are not stored in CAS2Net until you also hit the "Update" button on the employee record.

Figure 9-34: Temporary Promotion Web Form

Note that once you enter the promotion data and click the “Save” button, you have still not physically updated the CAS2Net database. That will not happen until you get to the end of the Employee Detail screen and click the “Update” button.

9.3.5 Create Supervisory Structure; Obtain CAC EDIPI

Make sure you have added all non-demo supervisors and have assigned them the highest supervisory user role they will have:

- Pay Pool Manager (PPM) is highest (note that each pay pool can have only one PPM)
- Sub-Panel Manager also called Supervisor II is the next highest
- Supervisor I is the lowest level of supervisor

Note each level of supervisor can also act as lower levels of supervisor

- PPM can be assigned as Sub-Panel Manager and Supervisor I
- Sub-Panel Manager can be assigned as Supervisor I
- You create your own sub-panels or sub-pay pools when you assign Sub-Panel Managers. You will be able to download these into the Sub-Panel version of the CCAS spreadsheet, which allows the sub-panel to review ratings, but does not allow them to assign payouts.

Make sure that you have created records for all non-demo supervisors and have assigned all supervisor roles before assigning supervisors to an employee or employees to a supervisor

Note: You will need to obtain the Social Security Number and Common Access Card (CAC) Electronic Data Interchange Personnel Identifier (EDIPI) for each non-demo user

OBTAINING CAC EDIPI

The following steps can be used by the employee to find his EDIPI.

1. Open ActivClient:
2. Double-click the ActivClient icon in your Windows system tray



Figure 9-35: Windows ActivClient Icon

- 10 digit EDIPI follows name in the title bar, but cannot be copied.
- 3. Double-click “Smart Card Info” icon.

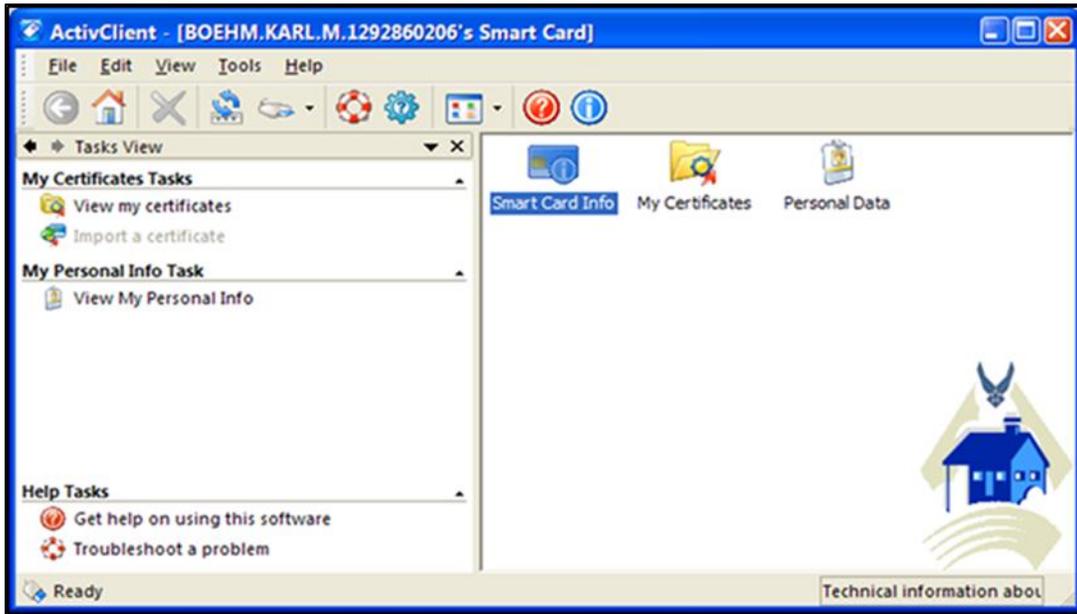


Figure 9-36: Smart Card Info Icon

- 10 digit EDIPI located in the User Name field, and can be copied
- 4. Copy and send to Pay Pool Administrator to establish account

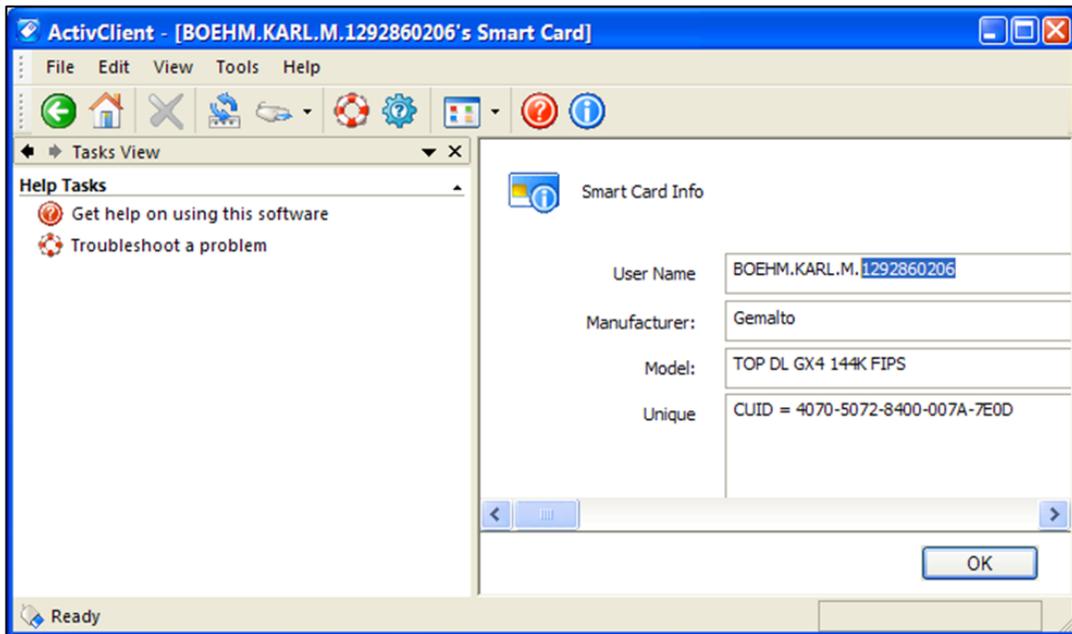


Figure 9-37: Smart Card Information Screen

CREATE NEW EMPLOYEE RECORD: NON-DEMO EMPLOYEE

Once you have the SSN and EDIPI, click “Data Maintenance” from the navigation bar. CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Insert New Employee Record” link.



Figure 9-38: Insert New Employee Record Link

- CAS2Net displays the Add an Employee Record screen.
- In Part 1 of the form:
 - Enter the *first* and *last name* along with the *Social Security Number* of the employee being added.

The fields in green are mandatory

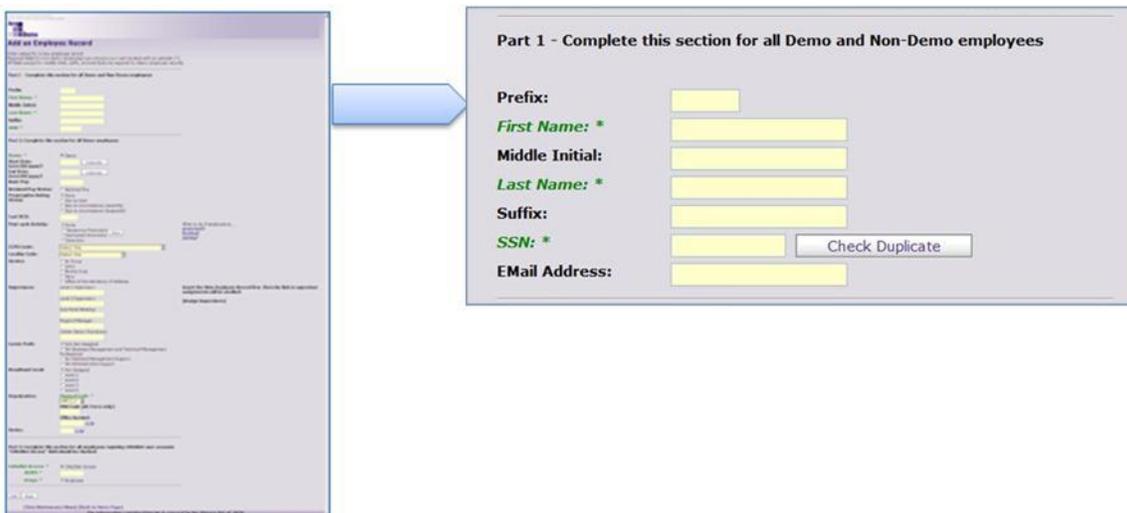


Figure 9-39: Add Employee Record – Part 1

In Part 2 of the form:

- Click the “Demo” checkbox to Uncheck and make the employee Non-Demo.
- Scroll to the “Organization” section of the form to the “Pay Pool Code” dropdown list. Select the pay pool name in which you want to put your employee into.

Part 2: Complete this section for all Demo employees

Demo: * Demo

Start Date: (mm/dd/yyyy)?

End Date: (mm/dd/yyyy)?

Basic Pay:

Retained Pay Status: Retained Pay

Presumptive Rating Status:

None

Due to time

Due to circumstance (expected)

Due to circumstance (recertify)

Last OCS:

Post-cycle Activity:

None

Temporary Promotion

Permanent Promotion [View](#)

Demotion

CCPO Code: Select One

Locality Code: Select One

Service:

Not Assigned

Air Force

Army

Marine Corp

Navy

Office of the Secretary of Defense

Supervisors:

Level 1 Supervisor:

Level 2 Supervisor:

Sub-Panel Meeting:

Pay Pool Manager:

Center Senior Functional:

Career Path:

N/A-Not Assigned

NH-Business Management and Technical Management Professional

NJ-Technical Management Support

NK-Administrative Support

Broadband Level:

Not Assigned

Level 1

Level 2

Level 3

Level 4

Organization: **Pay Pool Code: ***

AMC/LH

PAS Code (Air Force only):

Office Symbol:

LOV

Series:

LOV

What to do if employee is... promoted? leaving? joining?

Insert the New Employee Record first. Then the link to supervisor assignments will be enabled.

[Assign Supervisors]

Figure 9-40: Add Employee Record – Part 2

In Part 3 of the form:

- Enter the user’s EDIPI in the provided text box.
- Select radio button for desired User Group.
- Click the “Add” button at the bottom of the screen.

Part 3: Complete this section for all employees requiring CAS2Net user accounts
"CAS2Net Access" field should be checked.

CAS2Net Access: * CAS2Net Access

EDIPI: *

Group: *

- Employee
- Supervisor I
- Sub-Panel Manager
- Pay Pool Manager

Figure 9-41: Add Employee Record – Part 3

CAS2Net refreshes the screen to display a successful update.

Confirms:

- The employee has been successfully inserted
- Employee’s ID number
- SSN
- Name

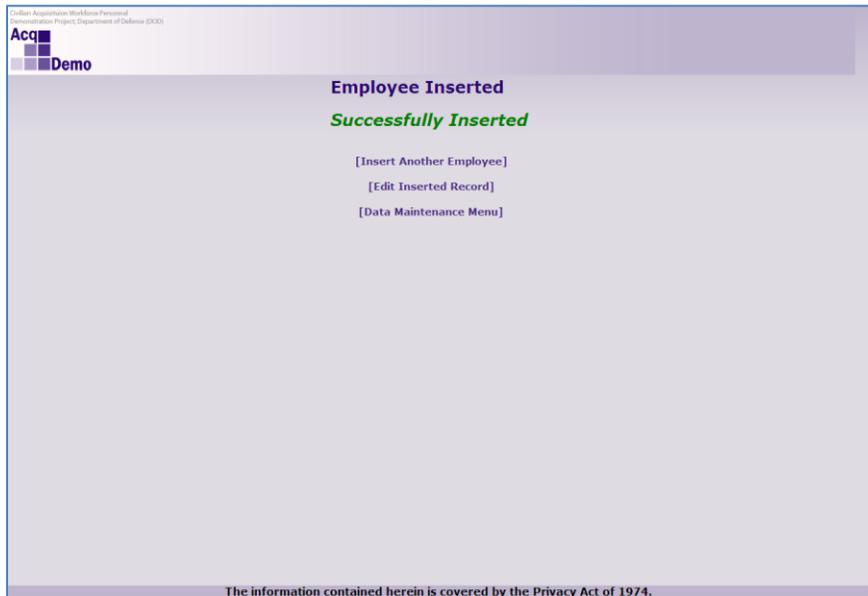


Figure 9-42: Add Employee Record Successful

9.3.6 Assign Supervisors to an Employee

To assign supervisors to an employee, click “Data Maintenance” from the navigation bar. CAS2Net refreshes the screen to display the Employee Maintenance Menu. Select the “Assign Supervisors to an Employee” link.



Figure 9-43: Assign Supervisors to an Employee Link

The Assign Supervisor to an Employee screen is displayed.

Select the supervisor assignment effective year—“current” or “next” (e.g. 2013 or 2014)—from the “Cycle Year” dropdown.

Select an employee’s name from the dropdown list.

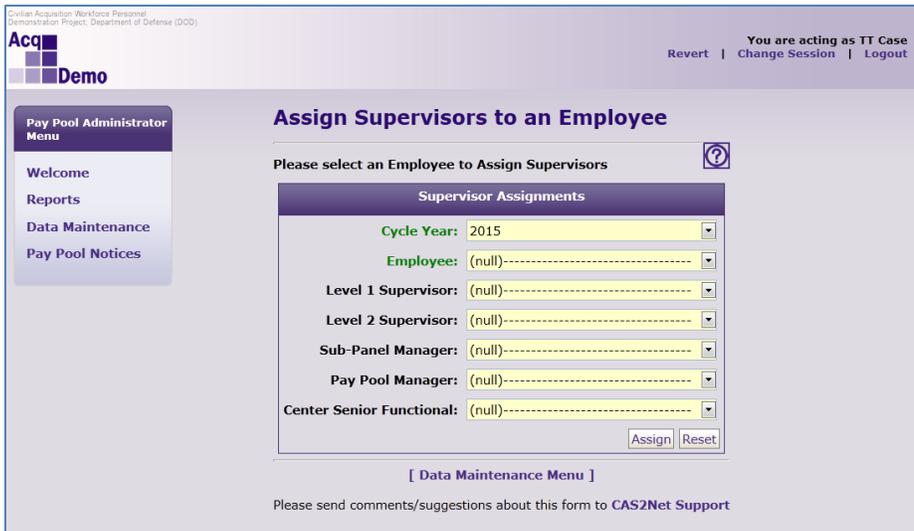


Figure 9-44: Assign Supervisors to an Employee Web Form

Figure 9-45: Assign Supervisors to an Employee Web Form

CAS2Net refreshes the supervisor dropdown lists to display the selected employee’s supervisors. Select the desired supervisors to assign to the selected employee using the provided dropdown lists. To undo selections made, and view the current supervisor assignments, click the “Reset” button. Select the new supervisors to be assigned to the selected employee and click the “Assign” button. Once you click the “Assign” button, CAS2Net displays the following message: “Supervisor(s) successfully assigned.”

If no supervisor assignments have been changed and the “Assign” button is clicked, the following message is displayed: “No supervisor changes made.”

Note that above pay pool superusers need to assign supervisors who are in a different pay pool than the employee using this module.

Figure 9-46: Assign Supervisors to an Employee Successful

“CURRENT YEAR” VS “NEXT YEAR” SUPERVISOR ASSIGNMENTS

“Current year” supervisor assignments control all supervisor relationships for the active appraisal cycle and employee history access. “Next year” supervisor assignments are presumed unchanged—unless and until the pay pool administrator explicitly assigns another supervisor for the “next year”.

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

Acq
Demo

You are acting as TT Case
Revert | Change Session | Logout

Pay Pool Administrator Menu

- Welcome
- Reports
- Data Maintenance
- Pay Pool Notices

Assign Supervisors to an Employee

Supervisor Assignments

Cycle Year: 2016

Employee: Artis, Amy (AMC/LH)

Level 1 Supervisor: (2015 default: Barry Burns)-----

Level 2 Supervisor: (2015 default: null)-----

Sub-Panel Manager: (2015 default: Bob Arnold)-----

Pay Pool Manager: (2015 default: Bob Arnold)-----

Center Senior Functional: (2015 default: null)-----

Assign Reset

[Data Maintenance Menu]

Please send comments/suggestions about this form to CAS2Net Support

Figure 9-47: Assign “Next Year” Supervisors to an Employee

Only explicit “next year” assignments are stored in the CAS2Net database. Missing “next year” assignments are populated from the “current year” defaults.

Select the supervisors to be explicitly assigned for “next year” and click the “Assign” button. To remove a “next year” assignment, select the “current year” default from the dropdown list—e.g. “(2013 default: Bob Arnold)”.

Once you click the “Assign” button, CAS2Net displays the following message: “Supervisor(s) successfully assigned.”

If no supervisor assignments have been changed and the “Assign” button is clicked, the following message is displayed: “No supervisor changes made.”

Civilian Acquisition Workforce Personnel
Demonstration Project, Department of Defense (DOD)

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Demo

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Pay Pool Administrator Menu

- Welcome
- Reports
- Data Maintenance
- Pay Pool Notices

Assign Supervisors to an Employee

Supervisor(s) successfully assigned.

Supervisor Assignments

Cycle Year: 2016

Employee: Artis, Amy (AMC/LH)

Level 1 Supervisor: Garfield, George (AMC/LH)5

Level 2 Supervisor: (2015 default: null)-----

Sub-Panel Manager: (2015 default: Bob Arnold)-----

Pay Pool Manager: (2015 default: Bob Arnold)-----

Center Senior Functional: (2015 default: null)-----

Assign Reset

[Data Maintenance Menu]

Please send comments/suggestions about this form to CAS2Net Support

Figure 9-48: Assign “Next Year” Supervisors to an Employee Successful

9.3.7 Assign Employees to Supervisor

To assign employees to a supervisor, click “Data Maintenance” from the navigation bar. CAS2Net refreshes the screen to display the Employee Maintenance Menu. Select the “Assign Employees to a Supervisor” link.



Figure 9-49: Assign Employees to Supervisor Link

The Assign Employees to a Supervisor screen is displayed.

Select a supervisor name from the dropdown list and select the supervisor role you want to assign (first level, sub-panel, or Pay Pool Manager).

Select the cycle year radio button—“current” or “next” (e.g. 2013 or 2014)



Figure 9-50: Assign Employees to Supervisor – Supervisor Selection

CAS2Net refreshes the screen to display a list of employees reporting to the selected supervisor.

Note: to view employees under the selected supervisor in a different level of supervision, select the desired radio button.

To sort the list of employees by Name or Organization, select the “Name” or “Org” radio button.

Click the check boxes next to employee name(s) of those employee(s) you want to assign to the selected supervisor. To assign all employees listed, click the “Check/Uncheck All” checkbox.

To undo selections click the “Reset” button.

To submit selections, click the “Submit” button.

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Demonstration Project, Department of Defense (DOD)

Acq
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Pay Pool Administrator Menu

Welcome

Appraisal Status and Lock

Reports

Data Maintenance

Offline Interface

Pay Pool Notices

eDocuments

Assign Employees to a Supervisor

Supervisor: Babbitt, Chris (AMC/LHXSA) Sort By: Name Org

First Level Supervisor
 Supervisor 2
 Sub-Panel Meeting
 Pay Pool Manager
 CSF

2015
 2016

Check/Uncheck All

<input checked="" type="checkbox"/> Amdt, Aaron (AMC/LHXTC)	<input checked="" type="checkbox"/> Artis, Amy (AMC/LHXTC)
<input checked="" type="checkbox"/> Contributor, Joe (AMC/LHXTB)	<input checked="" type="checkbox"/> Garfield, George (AMC/LH)
<input checked="" type="checkbox"/> Tarman, Timothy (AMC/LHXSA)	<input type="checkbox"/> Appleton, Adam A(AMC/LHA)
<input type="checkbox"/> Babbitt, Chris (AMC/LHXSA)	<input type="checkbox"/> Bracken, Billy (AMC/LH)
<input type="checkbox"/> Burns, Barry ()	<input type="checkbox"/> Butler, Bryce (AMC/LHXTC)
<input type="checkbox"/> Cavasos, Carmen (AMC/LHXTB)	<input type="checkbox"/> Celon, Connie (AMC/LHACA)
<input type="checkbox"/> Dancy, Dyanne (AMC/LHXTB)	<input type="checkbox"/> Donaldson, Dennis (AMC/LHACB)
<input type="checkbox"/> Emerson, Erica (AMC/LHXTB)	<input type="checkbox"/> Employee, Blank ()
<input type="checkbox"/> Evans, Erin (AMC/LHACB)	<input type="checkbox"/> Evans, Francis (AMC/LHX)
<input type="checkbox"/> Farnsworth, Fred (AMC/LHACB)	<input type="checkbox"/> Fites, George (AMC/LHXTC)
<input type="checkbox"/> Gonzalez, Helen (AMC/LHAC)	<input type="checkbox"/> Grimes, Garth (AMC/LHACB)
<input type="checkbox"/> Hansen, Ike (AMC/LHXTB)	<input type="checkbox"/> Harris, Henry (AMC/LHADA)
<input type="checkbox"/> Hoang, Andrew (AMC/LH)	<input type="checkbox"/> Hoang, Danielle ()
<input type="checkbox"/> Hoang, Eric (AMC/LH)	<input type="checkbox"/> Hummer, Hershel (AMC/LH)
<input type="checkbox"/> Irinski, Ivan (AMC/LHADA)	<input type="checkbox"/> Iverson, John (AMC/LHAD)
<input type="checkbox"/> Jerris, Jane (AMC/LHADA)	<input type="checkbox"/> Kames, Keith (AMC/LHADB)
<input type="checkbox"/> Lawrence, Lance (AMC/LHADB)	<input type="checkbox"/> Martinez, Mary (AMC/LHADB)
<input type="checkbox"/> Michelson, Nancy (AMC/LHXT)	<input type="checkbox"/> Mucker, Mark (AMC/LH)
<input type="checkbox"/> Nance, Nolan ()	<input type="checkbox"/> O'Connor, Olive (AMC/LHADC)
<input type="checkbox"/> Olson, Peter (AMC/LHACA)	<input type="checkbox"/> Parsons, Patricia (AMC/LHADC)
<input type="checkbox"/> Quarles, Richard (AMC/LHACB)	<input type="checkbox"/> Reid, Richard (AMC/LHXTC)
<input type="checkbox"/> Rhone, Ronald (AMC/LHADC)	<input type="checkbox"/> Sorenson, Sarah (AMC/LHAC)
<input type="checkbox"/> Udell, Vincent (AMC/LHADB)	<input type="checkbox"/> Ulanov, Uli (AMC/LHXSA)
<input type="checkbox"/> Vinson, Violet (AMC/LHXS)	<input type="checkbox"/> Williams, Wilson (AMC/LHXS)
<input type="checkbox"/> Yatey, Zane (AMC/LHADC)	<input type="checkbox"/> Yeakley, Yolanda (AMC/LHXS)
<input type="checkbox"/> Zurbriggen, Zack (AMC/LHXTC)	

Submit Reset

[Data Maintenance Menu]

Please send comments/suggestions about this form to CAS2Net Support

Figure 9-51: Assign Employees to Supervisor – Employees Selection

Verify the selected employees have been assigned to the supervisor.

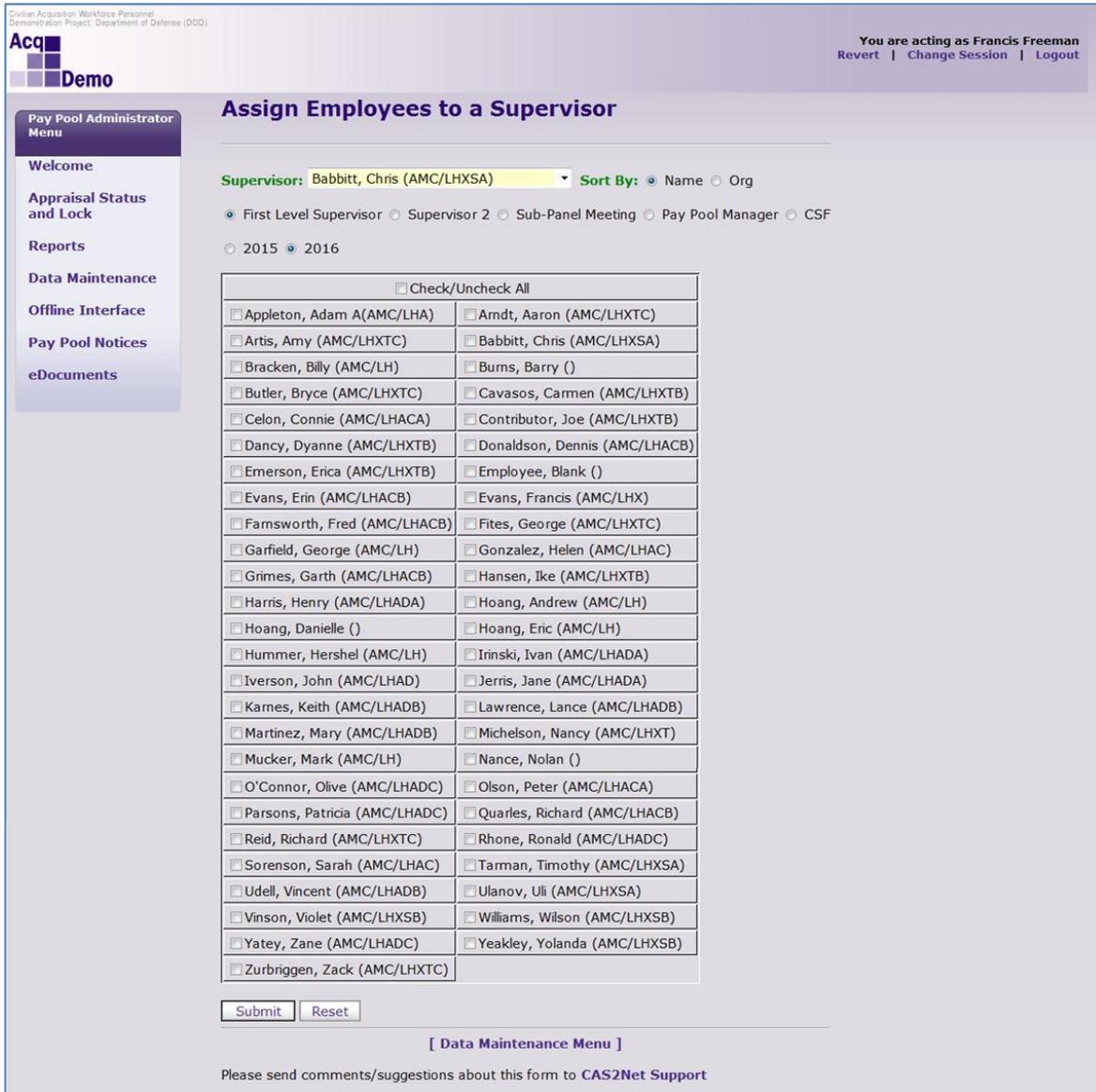
Repeat for each supervisory role held by the selected supervisor by clicking on each of the levels of supervisor radio buttons.

“CURRENT YEAR” VS “NEXT YEAR” SUPERVISOR ASSIGNMENTS

“Next year” supervisor assignments are presumed to be unchanged from the “current year”—unless and until the pay pool administrator explicitly assigns another supervisor for the “next year”.

An employee name is “checked” when an explicit “next year” assignments has been stored in the CAS2Net database. An “unchecked” employee name means that the employee is assigned to another supervisor or that the “next year” assignment defaults to “current year” supervisor.

Select the employees to be explicitly assigned for “next year” and click the “Submit” button. Uncheck the employee name to remove an explicit “next year” assignment and restore the “current



year” default.

Figure 9-52: Assign Employees to “Next Year” Supervisor – Employees Selection

9.3.8 Replace Supervisor Assignments

To assign employees to a supervisor, click “Data Maintenance” from the navigation bar. CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Replace Supervisor Assignments” link. Use this option when a supervisor is replaced by another person.



Figure 9-53: Replace Supervisor Assignments Link

The Replace Supervisor Assignments screen is displayed.

Select a supervisor name from the “Original Supervisor” dropdown list.

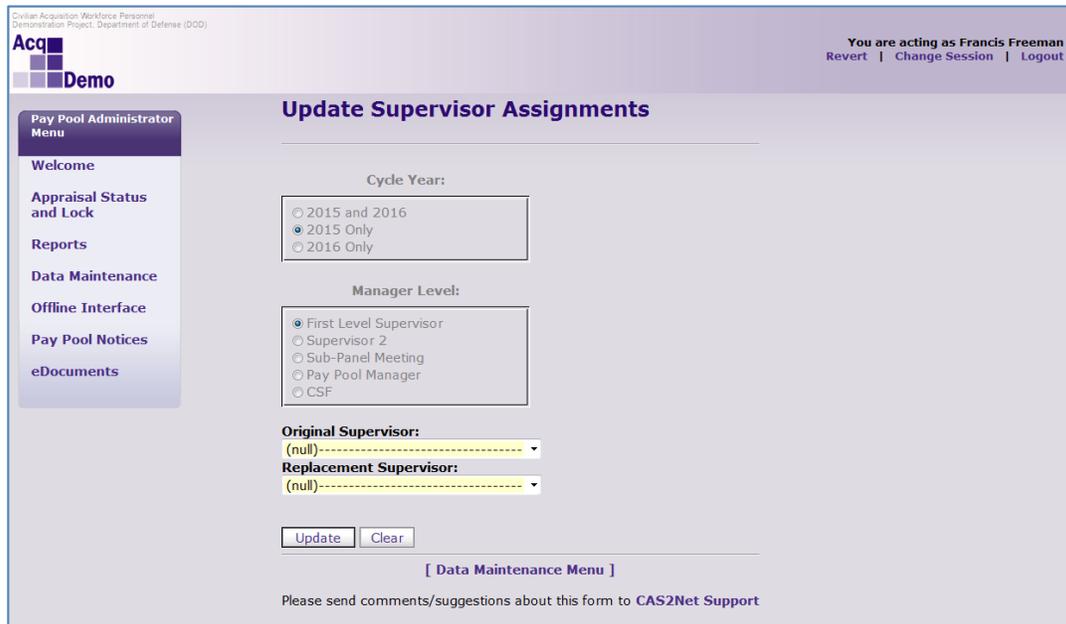


Figure 9-54: Update Supervisor Assignments – Supervisor Selection

Click “current year” or “next year” radio button to select the effective “Cycle Year”.

Click the associated radio button to select the level of supervision you want to replace assignments for the selected supervisor.

Select the name of the supervisor you want to replace assignments with from the “Replacement Supervisor” dropdown.

To clear selections, click the “Clear” button.

To submit changes, click the “Update” button.

CAS2Net displays a message indicating the number of successful replacements between the two selected supervisors.

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Demonstration Project, Department of Defense (DOD)

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Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports

Pay Pool Administrator Menu

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Paypool Notices

Update Supervisor Assignments

3 Replacements of Margaret Manager with Bob Arnold

Cycle Year:

2013 and 2014
 2013 Only
 2014 Only

Manager Level:

First Level Supervisor
 Supervisor 2
 Sub-Panel Meeting
 Paypool Manager
 CSF

Original Supervisor:
 Manager, Margaret (AMC/LH)

Replacement Supervisor:
 Arnold, Bob (AMC/LH)

Update Clear

[Data Maintenance Menu]

Please send comments/suggestions about this form to CAS2Net Support

The information contained herein is covered by the Privacy Act of 1974.

Figure 9-55: Replace Supervisor Assignments Successful

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Demonstration Project, Department of Defense (DOD)

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Pay Pool Administrator Menu

- Welcome
- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Pay Pool Notices
- eDocuments

Update Supervisor Assignments

5 Replacements of Bob Arnold with Margaret Manager

Cycle Year:

2015 and 2016
 2015 Only
 2016 Only

Manager Level:

First Level Supervisor
 Supervisor 2
 Sub-Panel Meeting
 Pay Pool Manager
 CSF

Original Supervisor:
 Arnold, Bob (AMC/LH)

Replacement Supervisor:
 Manager, Margaret (AMC/LH)

Update Clear

[Data Maintenance Menu]

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Figure 9-56: Replace Supervisor Assignments Successful

9.3.9 eDocuments Maintenance

The CAS2Net Document Repository is the database collection of digitally signed Annual Appraisal reports stored by employee by fiscal cycle.

Ideally, the employee and the 1st Level Supervisor will retrieve documents, attach digital signatures and update the CAS2Net Document Repository without incident. Recognizing that situations can occur that require intervention, CAS2Net provides “eDocument Maintenance” capabilities to recover or restart the signature process as needed.

This user guide section overviews the “eDocument Maintenance” features and functionality.

CAS2Net provides two navigation paths to the “eDocument Maintenance” web page.

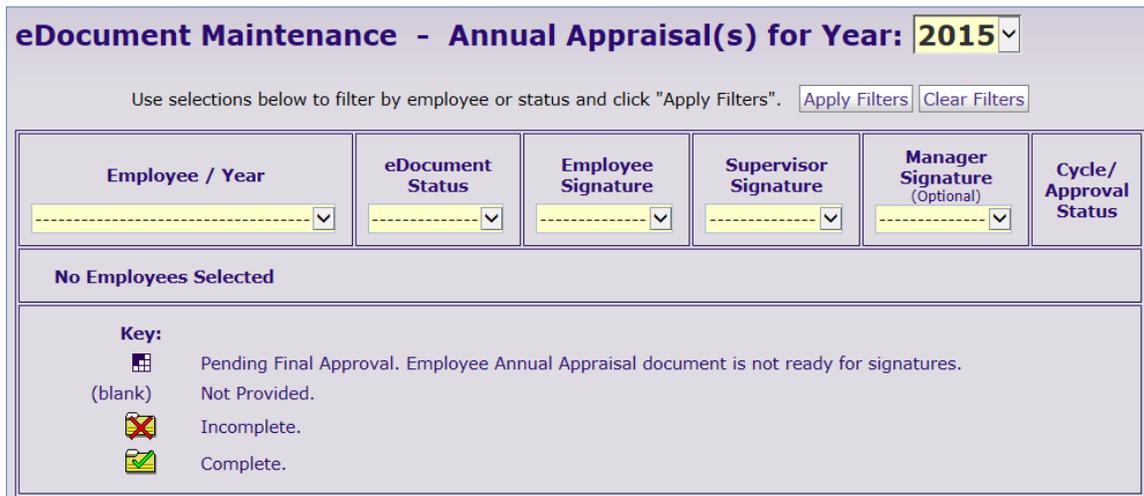
1. Select “eDocuments Maintenance” from the Data Maintenance “Employee Maintenance Menu” to access to all pay pool employees. This functionality will be used most often by Pay Pool Administrators.
2. Choose "Modify/Archive employee record using query form" or "Modify/Archive employee record using quick pick list" Data Maintenance “Employee Maintenance Menu” to access details for a specific CAS2Net employee. Click “eDocuments” at the bottom of the “Employee Detail” page to open “eDocument Maintenance” the selected employee.

EDOCUMENT MAINTENANCE SELECTION

Clicking **eDocuments Maintenance** in the Employee Maintenance menu displays the “eDocument Maintenance” status page.

Use the dropdowns provided to filter the content of the CAS2Net Document Repository by pay pool employee(s) or signature status.

- **Employee / Year**—selects a specific employee name or “All Employees”
- **eDocument Status**—selects Complete or Incomplete final Annual Appraisal status.
- **[Employee | Supervisor | Manager] Signature**—selects Complete or Incomplete signature status for the given role.
- **Apply Filters** button—retrieves the filtered results from the database.
- **Clear Filters** button—removes previous selections



eDocument Maintenance - Annual Appraisal(s) for Year: 2015

Use selections below to filter by employee or status and click "Apply Filters".

Employee / Year	eDocument Status	Employee Signature	Supervisor Signature	Manager Signature (Optional)	Cycle/ Approval Status
-----	-----	-----	-----	-----	-----

No Employees Selected

Key:

- Pending Final Approval. Employee Annual Appraisal document is not ready for signatures.
- (blank) Not Provided.
- Incomplete.
- Complete.

Figure 9-57: eDocument Maintenance Selection Filters

EDOCUMENT MAINTENANCE STATUS

To select one specific pay pool employee from the CAS2Net Document Repository:

- Select a name from **Employee / Year** dropdown
- Click **Apply Filters** to retrieve the employee eDocument status by year.

eDocument Maintenance - Annual Appraisal(s) for Year: ----- ▾

Use selections below to filter by employee or status and click "Apply Filters". Apply Filters Clear Filters

Employee / Year	eDocument Status	Employee Signature	Supervisor Signature	Manager Signature (Optional)	Cycle/ Approval Status
Artis, Amy (AMC/LH) ▾	----- ▾	----- ▾	----- ▾	----- ▾	
2015					
2014					

Key:

- Pending Final Approval. Employee Annual Appraisal document is not ready for signatures.
- (blank) Not Provided.
- Incomplete.
- Complete.

Figure 9-58: eDocument Maintenance Selected Employee Status

To select pay pool employees for a given year filtered by “All Employees” or signature status:

- Click **Clear Filters** to remove previous settings, if any.
- Use the **Year** dropdown in the title bar to select the appraisal cycle year.
- Select filter value(s) for “All Employees” or “Complete” / “Incomplete” status
- Click **Apply Filters** to retrieve the filtered results.

eDocument Maintenance - Annual Appraisal(s) for Year: 2014 ▾

Use selections below to filter by employee or status and click "Apply Filters". Apply Filters Clear Filters

Employee / Year	eDocument Status	Employee Signature	Supervisor Signature	Manager Signature (Optional)	Cycle/ Approval Status
All Employees ▾	Complete ▾	----- ▾	----- ▾	----- ▾	
Adam A. Appleton					
Carmen Cavasos					
Dennis Donaldson					
George Garfield					
Uli Ulanov					

Key:

- Pending Final Approval. Employee Annual Appraisal document is not ready for signatures.
- (blank) Not Provided.
- Incomplete.
- Complete.

Figure 9-59: eDocument Maintenance Selected Year Status

“eDocument Maintenance Status” content is the same for all selection criteria.

- **Year or Employee**—hot link to CAS2Net Document Repository “eDocument Maintenance” detail page.
- **eDocument Status**—overall CAS2Net Document Repository record status; values include:
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Green ‘checkmark’ = Annual Appraisal PDF file uploaded with required signatures complete
 - Red “X” = Appraisal PDF not uploaded or required signatures incomplete.
 - (blank) = Not Provided (Annual Appraisal is not approved for signatures)
- **Employee Signature**—status values include:
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Green ‘checkmark’ = employee signature certified complete
 - Red “X” = employee signature is not certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **Supervisor Signature**—status values include:
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Green ‘checkmark’ = 1st Level Supervisor signature certified complete
 - Red “X” = 1st Level Supervisor signature is not certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **Manager Signature**—applies to any higher level supervisor or manager; values include:
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Green ‘checkmark’ = manager signature certified complete
 - Red “X” = manager signature is not certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **Cycle/Approval Status**—indicates the current state of the Annual Appraisal approval status:
 - A partial grid icon indicates the Annual Appraisal is pending final approval and is not ready for signatures.
 - Green ‘checkmark’ = Final appraisal is printable by employee and supervisors
 - Red “X” = Final appraisal may be printed by supervisors and managers only; employees may not print the appraisal until all approval steps have completed.
 - (blank) = Final appraisal has not been approved for printing.

To access the “eDocument Maintenance” detail page:

- Click the **Employee / Year** link to open the “eDocument Maintenance” web form.

EDOCUMENT MAINTENANCE WEB FORM

The “eDocument Maintenance” web page displays all information contained in the CAS2Net Document Repository.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

Acq Demo

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eDocument Maintenance - 2014 Annual Appraisal for Joe Contributor

File Name	Date Posted
2014 Annual Appraisal for Joe Contributor.pdf	19-MAY-2015 05:19:24 PM active <input type="button" value="Unload"/>
Previous Uploads / Inactive PDF Files:	
2014 Annual Appraisal for Joe Contributor.pdf	15-MAY-2015 03:35:34 PM <input type="button" value="Remove"/> <input type="button" value="Reload"/>
2014 Annual Appraisal for Joe Contributor.pdf	29-APR-2015 01:07:14 PM <input type="button" value="Remove"/> <input type="button" value="Reload"/>

Click the file name link to open the document. To save to your computer, right click the file name and choose "Save Target As..."

To upload a signed document, use the browse button below to locate your saved document and click "Upload File".

File to upload:

Signatures

Employee <input type="checkbox"/> Signature Certified Complete	Name: <input type="text" value="Joe Contributor"/> Date Signed: <input type="text" value="04/29/2015"/> <input type="button" value="Calendar"/> Signature Method: <input checked="" type="radio"/> Digital <input type="radio"/> Handwritten <input type="radio"/> Declined to Sign
First Level Supervisor <input checked="" type="checkbox"/> Signature Certified Complete	Name: <input type="text" value="Margaret Manager"/> Date Signed: <input type="text" value="04/30/2015"/> Signature Method: <input checked="" type="radio"/> Digital
Supervisor 2 <input checked="" type="checkbox"/> Signature Certified Complete	Name: <input type="text" value="Tony Hoang"/> Date Signed: <input type="text"/> Signature Method: <input checked="" type="radio"/> Not Required
Sub-Panel Meeting <input type="checkbox"/> Signature Certified Complete	Name: <input type="text" value="Chris Babbitt"/> Date Signed: <input type="text" value="05/25/2015"/> <input type="button" value="Calendar"/> Signature Method: <input type="radio"/> Digital <input type="radio"/> Handwritten <input type="radio"/> Not Required
Pay Pool Manager <input type="checkbox"/> Signature Certified Complete	Name: <input type="text" value="Bob Arnold"/> Date Signed: <input type="text" value="05/25/2015"/> <input type="button" value="Calendar"/> Signature Method: <input type="radio"/> Digital <input type="radio"/> Handwritten <input type="radio"/> Not Required
CSF <input checked="" type="checkbox"/> Signature Certified Complete	Name: <input type="text"/> Date Signed: <input type="text"/> Signature Method: <input checked="" type="radio"/> Not Required

eDocument Signature Assignments

To add or update the name of a supervisor or manager whose signature is required on this document, select the name from the corresponding dropdown list and click "Assign".

First Level Supervisor:
Supervisor 2:
Sub-Panel Meeting:
Pay Pool Manager:
CSF:

Note. Refer questions related to this document to the Pay Pool Administrator or Joe Contributor's 1st Level Supervisor, Margaret Manager.

Figure 9-60: eDocument Maintenance Web Form

“eDocument Maintenance” web form content includes:

File Name & Date Section—provides input controls for accessing the Annual Appraisal PDF file.

- File status message—explains why an active PDF file is not present (displayed as needed)
- **[Generate Adobe PDF File]**—link to Oracle Reports to create an initial unsigned “Appraisal Parts I,II, and III” report (displayed when Annual Appraisal is approved but active PDF file is not present).
- **File Name**—link to view or download the active PDF file (displayed when file is present)
- **Date Posted**—file upload date and time (displayed when file is present)
- **Active**—status indicator identifies the current active PDF in the CAS2Net Document (displayed when file is present)
- **Unload** button—deactivates the current active PDF file, moves the filename to list of “Previous Uploads / Inactive PDF Files” and resets “Signature Certified Complete” for all signers. Given no active PDF file to download, CAS2Net will revert to “1st signer” status and provide the **[Generate Adobe PDF File]** to generate the initial unsigned Annual Appraisal report. Clicking “Unload” effectively starts over the eDocument process for this appraisal.
- **Previous Uploads / Inactive PDF Files**—lists prior files uploaded by signers.
- **Remove** button—deletes an unwanted inactive PDF file.
- **Reload** button—restores an inactive PDF file to active status. The formerly active filename is moved to the “Previous Uploads / Inactive PDF Files” list.
- **File to Upload**—Windows browse control to locate the signed PDF file on the local hard drive (displayed when file may be uploaded)
- **Upload File** button—uploads signed Annual Appraisal PDF file from designated hard drive location (displayed when file may be uploaded)

Signatures Section—provides input fields to track signature details by CAS2Net user role.

- Employee –
 - **Signature Certified Complete**—checkbox indicator that employee signature is complete
 - **Name**—modifiable text box pre-filled with employee’s name
 - **Date Signed**—date that employee signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—employee digitally signed using Adobe Pro software
 - **Handwritten**—employee signed hard copy printout and uploaded scanned file
 - **Declined to Sign**—employee intentionally chose not to sign the Annual Appraisal
- First Level Supervisor –
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with 1st Level Supervisor’s name
 - **Date Signed**—date that 1st Level Supervisor signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—1st Level Supervisor digitally signed using Adobe Pro software
 - **Handwritten**—1st Level Supervisor manually signed and uploaded scanned file
- Supervisor 2 –
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with 2nd Level Supervisor’s name
 - **Date Signed**—date that 2nd Level Supervisor signed the Annual Appraisal

- **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—2nd Level Supervisor digitally signed using Adobe Pro software
 - **Handwritten**—2nd Level Supervisor manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- Sub Panel Meeting –
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the manager signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—manager digitally signed using Adobe Pro software
 - **Handwritten**—manager manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- Pay Pool Manager –
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the Pay Pool Manager signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—Pay Pool Manager digitally signed using Adobe Pro software
 - **Handwritten**—Pay Pool Manager manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- CSF –
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the CSF signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—CSF digitally signed using Adobe Pro software
 - **Handwritten**—CSF manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- **Save** button—updates the CAS2Net Document Repository signatures

eDocument Signature Assignment Section—enables the Pay Pool Administrator to redirect signature role responsibility to another supervisor or manager.

- **First Level Supervisor** – lists pay pool users in 1st Level Supervisor group or higher.
- **Supervisor 2** – lists pay pool users in 2nd Level Supervisor group or higher.
- **Sub Panel Meeting** – lists pay pool users in Sub Panel Meeting group or higher.
- **Pay Pool Manager** – lists pay pool users in Pay Pool Manager group or higher.
- **CSF** – lists pay pool users in 1st Level Supervisor group or higher.
- **Assign** button—updates the database with selected signature assignments.

Notes—message text identifying the effective 1st Level Supervisor for this appraisal

Exit button—returns to “eDocument Maintenance Status” page.

Note that the effective 1st Level Supervisor for a given appraisal has access to all “eDocument

EDOCUMENT MAINTENANCE ACTIONS

To turn on maintenance features when all fields are read-only:

CAS2Net considers the document repository record to be final after the PDF file has been uploaded and all signature roles are complete. In this case, eDocument fields are displayed read-only and maintenance controls are disabled.

To enable “eDocument Maintenance” -

- Uncheck “Signature Certified Complete” for any role
- Click “Save” to update the database and enable maintenance capabilities.

To enable a user to redo signature details:

Once a signer has clicked “Signature Certified Complete” on the “eDocument” web form, no further changes are allowed. All fields are displayed read-only that user and only the “File Name” link is active to view the signed document.

To enable changes for this user -

- Uncheck “Signature Certified Complete” for this signer
- Click “Save” to update the database and reset the read-only status for the given role.

To restore a previously uploaded file:

Each “Upload File” adds a new version of the signed Annual Appraisal to the CAS2Net Document Repository with the new upload as the current “Active” PDF file. For the signer CAS2Net only provides access to the current “active” file.

The Pay Pool Administrator can restore an earlier version of the signed appraisal if that becomes necessary for any reason -

- Identify the “good” filename in the “Previous Uploads / Inactive PDF Files” list
- Click “Reload” to restore the selected filename to “Active” status and move the “bad” file to the “Previous Uploads / Inactive PDF Files” list.

To delete an unwanted inactive file:

Filenames in the “Previous Uploads / Inactive PDF Files” list can be deleted by the Pay Pool Administrator -

- Identify the “unwanted” filename in the “Previous Uploads / Inactive PDF Files” list
- Click “Remove” to permanently delete the file from the CAS2Net Document Repository.

To upload the signed Annual Appraisal PDF file:

The Pay Pool Administrator can upload the Annual Appraisal PDF file on behalf of others -

- Use the File to Upload “Browse” button to locate the signed appraisal on your hard drive.
- Click “Upload File” to add the file to the CAS2Net Document Repository.
- Follow guidelines to add or correct signature details (see below).

To add or correct signature details:

- For each signatory included in the current “active” PDF file -
 - Enter or update signature information (Name, Date Signed, Signature Method)
 - Check “Signature Certified Complete” to certify that the signature is present in the file.
- Click “Save” to update the database.

To change signature role responsibility:

Signature roles are derived from the list of assigned supervisors for the selected employee for the respective year. If the CAS2Net user is unavailable for any reason, the Pay Pool Administrator can specify another user to take his place.

Note that this functionality applies **ONLY** to the respective CAS2Net Document Repository record. It has no impact on any other CAS2Net feature.

- Select name(s) from one or more dropdown lists
- Click **Assign**.

Note that signatures previously saved with **Signature Certified Complete** cannot be reassigned.

Figure 9-61: eDocument Maintenance Signature Assignments

9.3.10 Replace PAS Code

To replace PAS code values, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Replace PAS Code” link to replace all instances of a given PAS code with the specified value.



Figure 9-62: Replace Supervisor Assignments Link

The Replace Supervisor Assignments screen is displayed.



Figure 9-63: Replace Supervisor Assignments Link

Enter the “Original PAS Code” and “Replacement PAS Code” values.

Click “Update” to employee records that match the “Original PAS Code” to the specified “Replacement PAS Code”. CAS2Net executes replace procedure and displays:

“Number replacements of Original PAS Code with Replacement PAS Code”

Click “Clear” to reset input fields to blanks.

9.4 Offline Interface

The “Offline Interface” enables the Pay Pool Administrator to transfer pay pool information to and from the CCAS Spreadsheet for Pay Pool Panel evaluation.

Click “Offline Interface” in the Pay Pool Administrator Menu of the left side navigation bar. CAS2Net displays the Offline Interface menu.

The name of your pay pool will be displayed in the **Pay Pool** dropdown. If you have access to multiple pay pools, select the name of the pay pool you want to access.

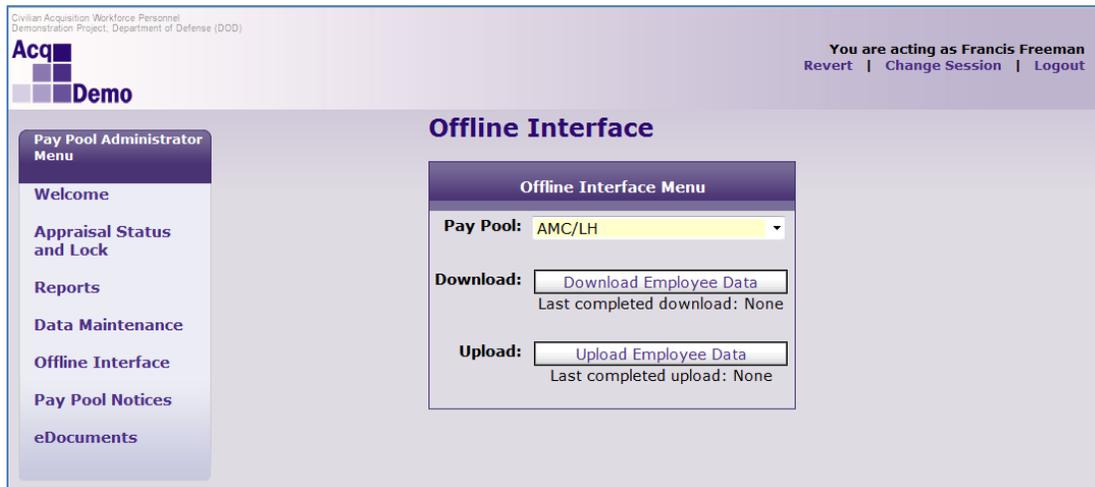


Figure 9-64: Offline Interface Menu

9.4.1 Download Employee Data

When the CAS2Net database includes all of the AcqDemo employees in your pay pool, and all of the data elements have been reviewed and corrected, you are ready to export files for use in the CCAS spreadsheet. You have two methods for doing this, depending on how your pay pool plans to use the spreadsheet.

Method 1: Some pay pools prefer to have only one spreadsheet containing all employees, into which all factor scores can be entered. These pay pools can either use the same spreadsheet, filtered by managers meeting, to sequentially record scores from each meeting, or can capture the results of the various meetings on paper and then transcribe them into the spreadsheet. To generate a single export file containing all pay pool employees, click on the Offline Interface link on the Main Menu, then click the Download Employee Data button, and then select the file named “PPxxx_to_CCAS.csv”. Follow the instructions on the screen for downloading the file (the procedure depends on which browser you are using). Point to where on your hard drive you want the file saved, click the “Save” button and you are done.

Method 2: Other pay pools prefer to have a separate spreadsheet for each of their managers meetings. To generate these separate files, proceed as in Method 1 above, but when you get to the list of files, select the file named “PPxxx_to_CCAS_name.csv” where “name” is the first manager for whom you want to create a separate file. Continue the download process as in Method 1 above. Repeat this process for each manager. Employees whose records are not reviewed at a managers meeting (i.e., direct reports to the Pay Pool Manager) are contained in a file named “PPxxx_to_CCAS_(No Manager).csv”.

Click the “Download Employee Data” button to list the data files available for download.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Francis Freeman
Revert | Change Session | Logout

Offline Interface - Download Employee Data

Download Instructions

NOTE: Files are dynamically generated and the server may take several minutes before download starts.

Please be patient and do not repeatedly request a download file which will cause the server to slow down further and may generate duplicate appraisal records.

To save a linked file to your computer, use a right mouse button click on the link and choose "Save Target As..."

Sub-Panel Meeting choices without hot links for the files have been locked. Contact your pay pool administrator if you need to unlock a meeting.

Pay Pool	File Name	File Description
AMC/LH	ppAMCLH_to_CMS.csv	Pay Pool: AMC/LH
	ppAMCLH_to_Sub-Panel_Bob_Arnold.csv	Sub-Panel Manager: Bob Arnold
	ppAMCLH_to_Sub-Panel_Dan_Curtiss.csv	Sub-Panel Manager: Dan Curtiss
	ppAMCLH_to_Sub-Panel_Francis_Evans.csv	Sub-Panel Manager: Francis Evans
	ppAMCLH_to_Sub-Panel_(No_Sub-Panel).csv	Sub-Panel Manager: None Assigned

[Return to Offline Interface Main Menu]

Figure 9-65: Offline Interface – Download Employee Data

Files that are available for downloading are displayed as hyperlinks. A filename shown as ordinary text indicates that the content has been locked. The Pay Pool Administrator can utilize the “Appraisal Status and Lock” functionality to unlock the file.

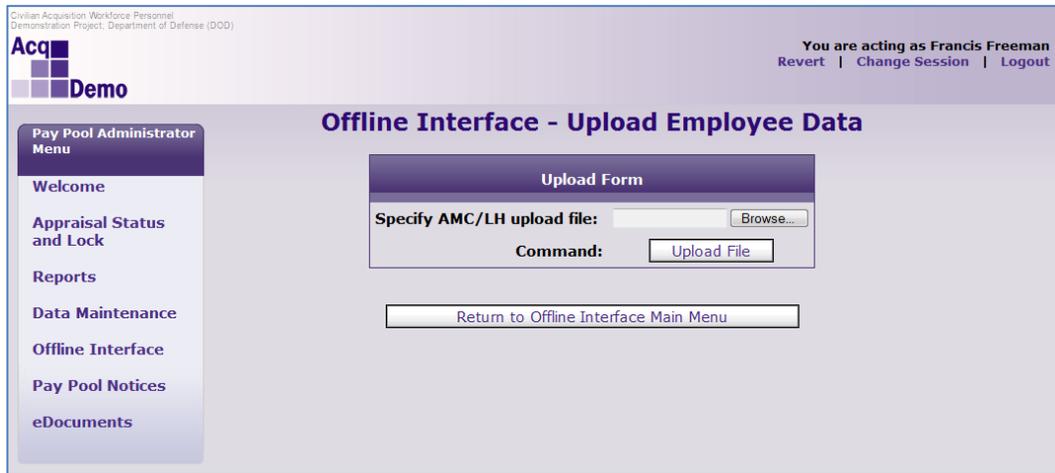
Click a filename link and follow the Windows “File Download” instructions to “Open” or “Save” the employee data file.

Click “Return to Offline Interface Main Menu” to exit.

9.4.2 Upload Employee Data

The CCAS spreadsheet that managers use to enter scores and adjust compensation does not permit changes to basic personnel information – that can only be done directly on the CAS2Net database using Data Maintenance functions. All personnel data errors discovered after managers start using the spreadsheet must be corrected in the CAS2Net database. A new download file with the corrected data must then be generated for import into the spreadsheet. However, each import into the spreadsheet completely overwrites the information already in the spreadsheet. So managers do not lose any work they have already accomplished in the spreadsheet, the CAS2Net database is designed to upload and download the data elements that managers control in the spreadsheet. Therefore, before using the CAS2Net database to correct errors discovered by a manager, the manager must first export a file from his or her spreadsheet for upload to the database. The exported file will be named ppXXX_to_CAS2Net_name.csv. If the file contains the entire pay pool, the manager’s name will not be part of the file name.

To upload the file to the CAS2Net database, click on the Offline Interface link on the Main Menu, and then click the Upload Employee Data button. Then, either type in the full name of the file you want to upload, or click the “Browse” button to go find the file.



The screenshot shows the 'Offline Interface - Upload Employee Data' page. At the top left, it says 'Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)' and 'Acq Demo'. At the top right, it says 'You are acting as Francis Freeman' with links for 'Revert', 'Change Session', and 'Logout'. On the left is a 'Pay Pool Administrator Menu' with links for 'Welcome', 'Appraisal Status and Lock', 'Reports', 'Data Maintenance', 'Offline Interface', 'Pay Pool Notices', and 'eDocuments'. The main content area is titled 'Offline Interface - Upload Employee Data' and contains an 'Upload Form'. The form has a field for 'Specify AMC/LH upload file:' with a 'Browse...' button, and a 'Command:' field with an 'Upload File' button. Below the form is a button labeled 'Return to Offline Interface Main Menu'.

Figure 9-66: Offline Interface – Upload Employee Data

Depending on the version of your web browser, your browse window may be set to look for HTML Files only – use the dropdown list under file type to select “All Files (*.*)”. Once you have located and highlighted the file, click “Open” and then click “Upload File”. At this point all of the data elements entered into the spreadsheet, such as contribution scores, wild card entries, and pay adjustments, are stored in the CAS2Net database. You can now update personnel information and download and import a new file back into the spreadsheet, which will contain the corrected personnel data as well as all of the spreadsheet data that was stored from the upload. The manager can then proceed on with the CCAS process from where he or she left off without having to re-enter any data.

9.5 Pay Pool Notices

Select “Pay Pool Notices” in the Pay Pool Administrator Menu on the left side navigation bar to display the Pay Pool Notices menu.

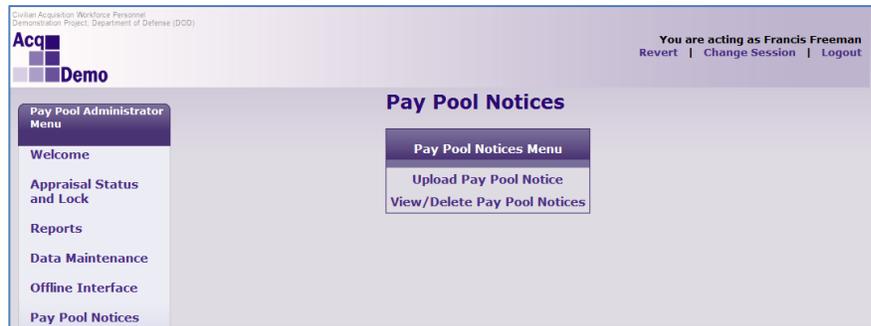


Figure 9-67: Pay Pool Notices Menu

FILE UPLOAD

Click “Upload Paypool Notice” to display the “Pay Pool Notices – Upload File” options screen.

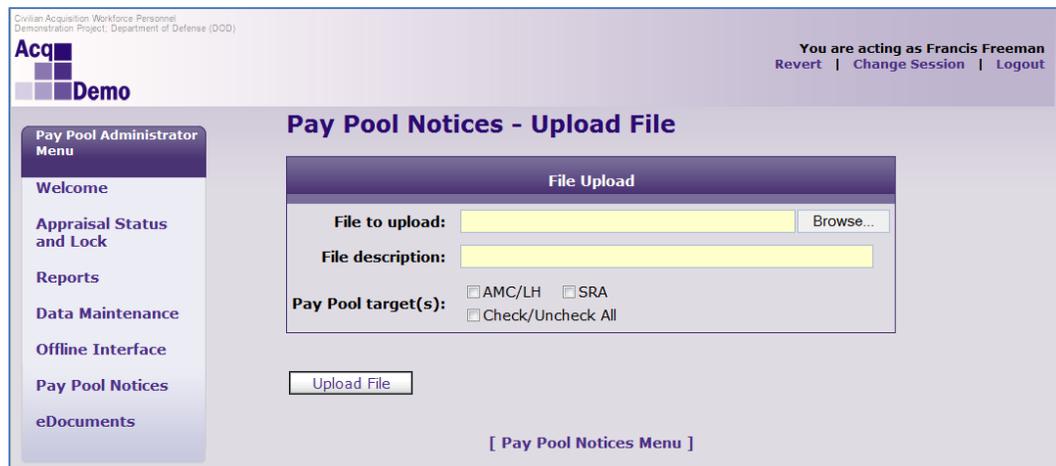


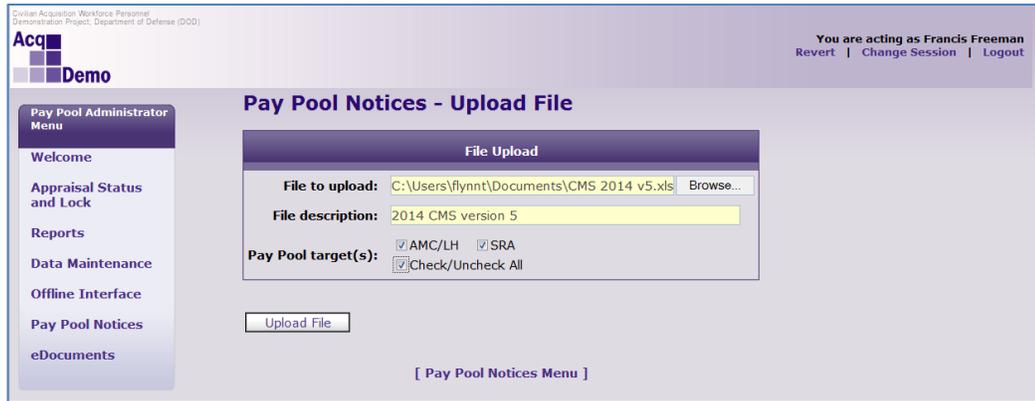
Figure 9-68: Pay Pool Notices Upload

Enter the name of the file to upload or use the “Browse” button to navigate to it in the windows file directory.

Add descriptive text to annotate the content and/or purpose of the file to be uploaded.

Choose one or more Paypool target(s) radio buttons.

Click “Upload File” to retrieve the file and store it in the CAS2Net database.



CAS2Net confirms that the file was successfully uploaded.

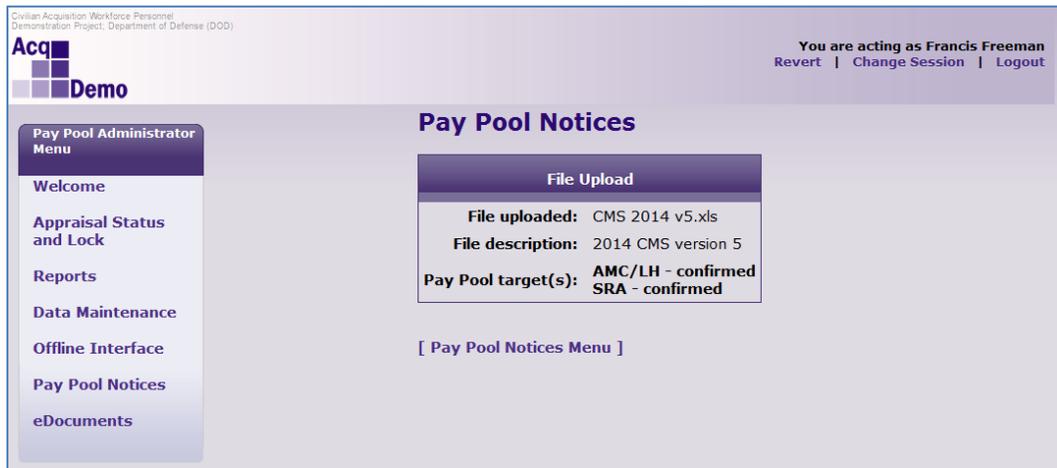


Figure 9-69: Pay Pool Notices Upload Confirmation

VIEW OR DELETE FILE

Click “View/Delete Pay Pool Notices” in the Pay Pool Notices Menu to display the Pay Pool Notices file list.

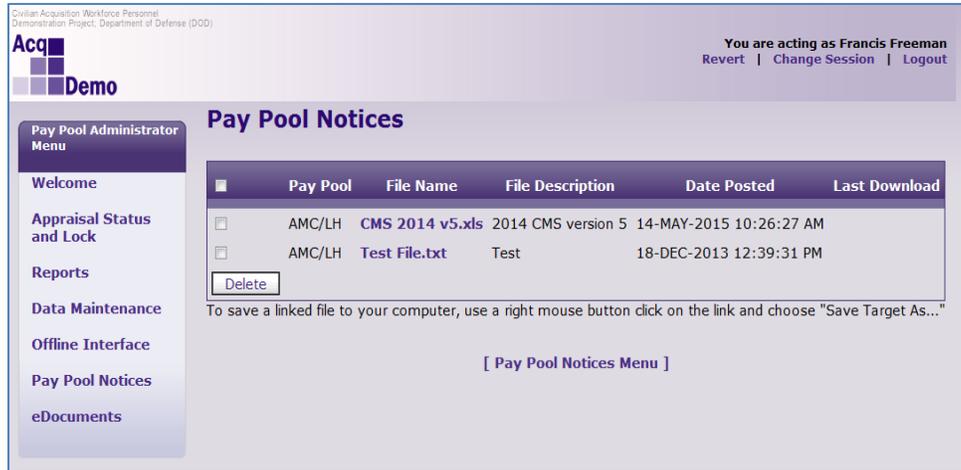


Figure 9-70: Pay Pool Notices List

Click on a filename link to view [and save] the Pay Pool Notices file.

To delete files, check the leading checkbox on the left of one or more files to be deleted. To quickly select all files listed, click the top checkbox in the table header. Click “Delete” to remove the selected files from the CAS2Net database.

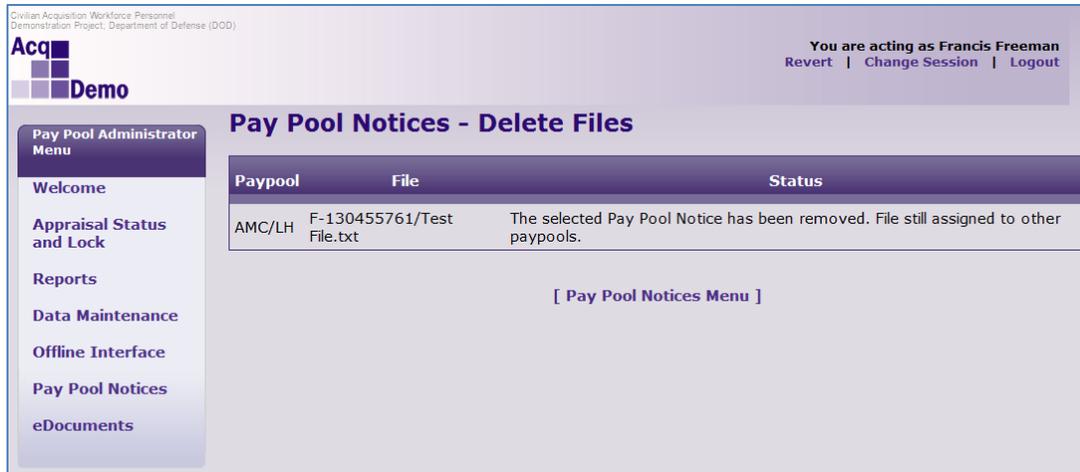


Figure 9-71: Pay Pool Notices – Delete Files Successful

9.6 eDocuments - CAS2Net Document Repository

The CAS2Net Document Repository is the database collection of digitally signed Annual Appraisal reports stored by employee by fiscal cycle.

When end of cycle processes are complete and Annual Appraisals have been approved, both the 1st Level Supervisor and the employee will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository. Since higher level supervisors and managers may rate or review Annual Appraisals for subordinate employees, virtually any CAS2Net user group above 1st Level Supervisor may also need to sign Annual Appraisals in the CAS2Net Document Repository.

Reference section “12.0 CAS2Net Document Repository (eDocuments)” in this user guide for an overview of the CAS2Net Document Repository content and functionality for all CAS2Net users.

10. SUPERUSER

This section provides guidance for the CAS2Net Superuser on how to use CAS2Net to oversee pay pool operations.

The following options appear in the Superuser navigation bar after you have successfully logged in: **Welcome**, **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Offline Interface**, **Pay Pool Notices**, **Session Maintenance**, and **eDocuments**.

- **Welcome** displays the CAS2Net welcome screen.
- **Appraisal Status and Lock** summarizes the appraisal status of employees in the assigned pay pool by supervisor level; provides the capability to drill down by supervisor to list employee details; and locks or unlocks appraisals by sub-panel manager or for the entire pay pool.

Refer to Section “9.1 Appraisal Status and Lock” for more information about this feature.

- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.
- **Data Maintenance** provides maintenance tools for creating or updating employee records; supports assignment of one or more employees to the Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, or Pay Pool Manager of your assigned pay pool; provides the capability to assign one or more supervisors to an employee in your assigned pay pool.

Refer to Section “9.3 Data Maintenance” for information relating to data maintenance functions.

- The **Session Maintenance** option provides the capability to assume the role assigned to another CAS2NET user in your pay pool for the purpose of executing his responsibilities in his absence.
- The **Pay Pool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.

Refer to Section “9.5 Pay Pool Notices” for information on this feature.

- Click **eDocuments** to access the CAS2Net Document Repository to digitally sign final Annual Appraisal reports for your subordinates. CAS2Net enables the Level 1 Supervisor to upload signed documents on behalf of others and make necessary corrections.

If the Superuser is also a “demo” employee, then the following “Employee Menu” options will appear in the upper portion of the navigation bar: **Contribution Planning**, **Mid-Point Review**, **Self-Assessment**, **Annual Appraisal Self-Assessment**, **Closeout Self-Assessment**, and **Reports**.

Refer to Section “4. Employee” for information relating to the Employee Menu features.

When the Superuser has responsibility for rating the performance of direct reports, then the following supervisor options will appear at the top of the Pay Pool Administrator Menu in the navigation bar: **Contribution Planning**, **Additional Feedback**, **Mid-Point Review**, **Annual Appraisal**, and **Closeout Assessment**. These features are detailed in Section “5. Level 1 Supervisor”.

10.1 Reports

Click “Reports” in the Superuser Menu of the navigation bar to display the Superuser Reports menu.

CAS2Net displays the following report options for the Superuser.

- Appraisal Form Parts I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster By Employee
- Supervisor Roster By Supervisor
- Zone A/CIP Report



Figure 10-1: Superuser Reports Menu

Section “11.2 Supervisor Reports” provides samples of CAS2Net reports.

10.2 Session Maintenance

This section describes how the system users change and assume the role of another user.

1. Log in as Superuser or Full Access User.
2. Click on “[Session Maintenance](#) – Assume the role of another user”.
3. CAS2Net displays Session Maintenance screen, includes:
 - User Group: Group of organizations, or roles such as Supervisor Level 1, Supervisor Level 2, Pay Pool Manager, Pay Pool Administrator, etc....
 - Selection: displays a dropdown list which contains the supervisors’ names for each User Group.
 - “Change to selected” buttons.



Figure 10-2: Session Maintenance Screen

4. Select a role and name from the dropdown list that you wish to assume the role, and then click “Change to selected” button.
5. CAS2Net displays:
 - The current role shown as the name and role of the assumed supervisor.

- A “Revert To Self” button.
- The appropriate menu options in the left navigation bar for the selected supervisor and role.
- Options to switch to different roles within the organization the assumed.

Note: When CAS2Net changes the current role to the selected name and role, the menu options also changed. The example here shows the assumed supervisor is “Supervisor, Level 1”, the left navigation bar shows all options belong to that role:

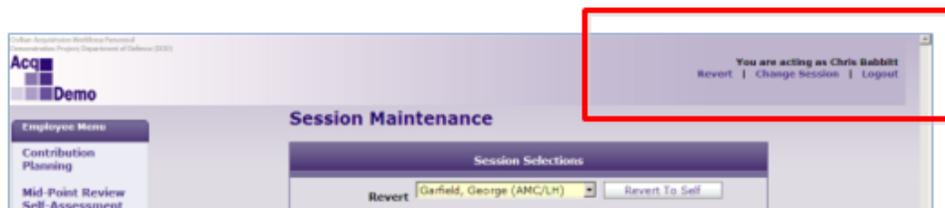


Figure 10-3: Session Maintenance – “Current Role Is...” Screen

6. To resume work as the logged in supervisor, click the “Revert To Self” button.
7. CAS2Net goes back to the logged on Superuser or Full Access User’s Session Maintenance screen.

11. CAS2NET REPORTS

The CAS2NET Reports functionality allows supervisors to generate reports that list employees, appraisal status, supervisor assignments, etc.

11.1 Employee Reports

- Clicking **Reports** in the Employee menu of the left side navigation bar brings up a list of reports that are available to the employee.
- CAS2Net displays CAS2Net report menu



Figure 11-1 : Employee Reports Menu

11.1.1 Contribution Planning

- From the Employee Reports menu, select Contribution Planning – Single Employee.
- CAS2Net displays the “Contribution Plan – Employee” for the employee.
- Click “Generate”.



Figure 11-2: Employee Contribution Planning Report Options

- CAS2Net displays Contribution Planning report with the selected employee name print on the title (see figure: Employee Contribution Planning Report)

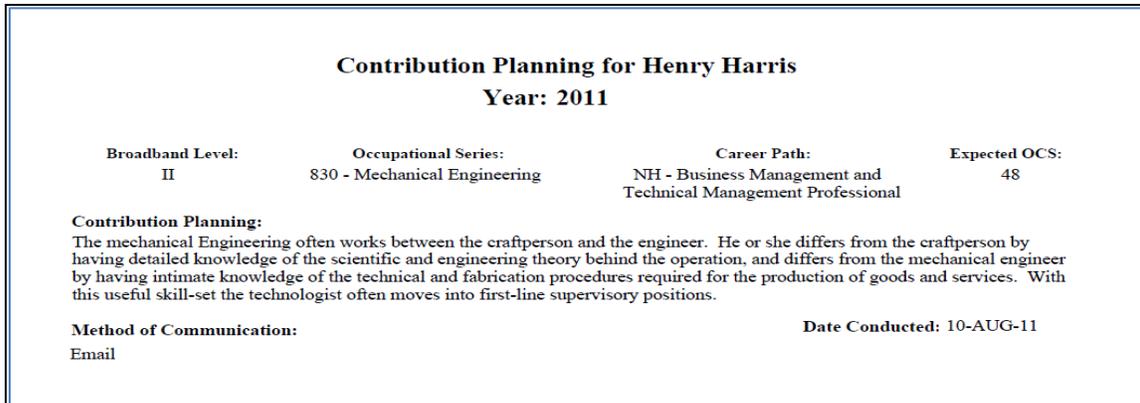


Figure 11-3 : Employee Contribution Planning Report

11.1.2 Additional Feedback

- From the Supervisor Reports menu, select Additional Feedback – Single Employee.
- CAS2Net displays Additional Feedback – Employee screen for the employee.
- Click “Generate”.



Figure 11-4: Additional Feedback Report – Single Employee Selection

- CAS2Net displays Additional Feedback report with the selected employee name print on the title (see figure: Employee Additional Feedback Report.)

Additional Feedback for Henry Harris			
As of 07/14/11 10:37			
Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	48
Contribution Planning:			
The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.			
Overall Supervisor Feedback:			
This is a test. Henry has this overall assessment.			
Problem Solving			
Problem Solving - Henry has good problem solving skill			
Teamwork/Cooperation			
Teamwork/Cooperation - Henry works well with others...			
Customer Relations			
Customer Relations - Henry has good relationship with the customer			
Leadership/Supervision			
Leadership/Supervision - not applicable, Henry is not a supervisor			
Communication			
Communication - Henry can communicate....			
Resource Management			
Resource Management - Henry knows how to manage resources....			
Method of Communication:			Date Conducted: 07/11/11
Email			

Figure 11-5: Employee Additional Feedback Report

11.1.3 Annual Appraisal Self-Assessment

- From the Employee Reports menu, select Annual Appraisal Self-Assessment.
- CAS2Net displays the “Annual Appraisal Self-Assessment – Single Employee” for the employee.



Figure 11-6: Annual Appraisal Self-Assessment Report

- Click “Generate”.
- CAS2Net displays Annual Appraisal Self-Assessment report (see figure: Annual Appraisal Self-Assessment Report).

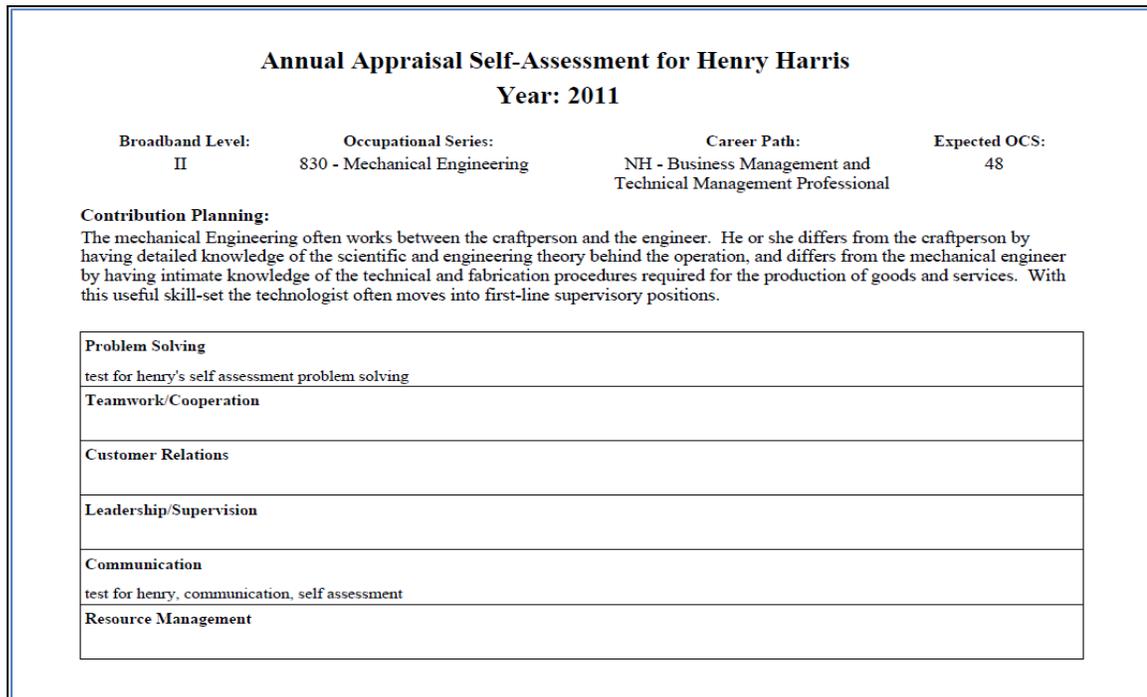


Figure 11-7: Annual Appraisal Self-Assessment Report

11.1.4 Appraisal Form Parts I, II and III – Single Employee

- From the CAS2Net employee reports menu, select Appraisal Form Parts I, II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts I, II and III – Single Employee screen.
- CAS2Net displays CCAS Salary Appraisal Document report in three parts: Part I – CCAS Salary Appraisal, Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figure: Appraisal Form Parts II and III – Single Employee, Part II and figure: Appraisal Form Parts II and III – Single Employee, Part III).

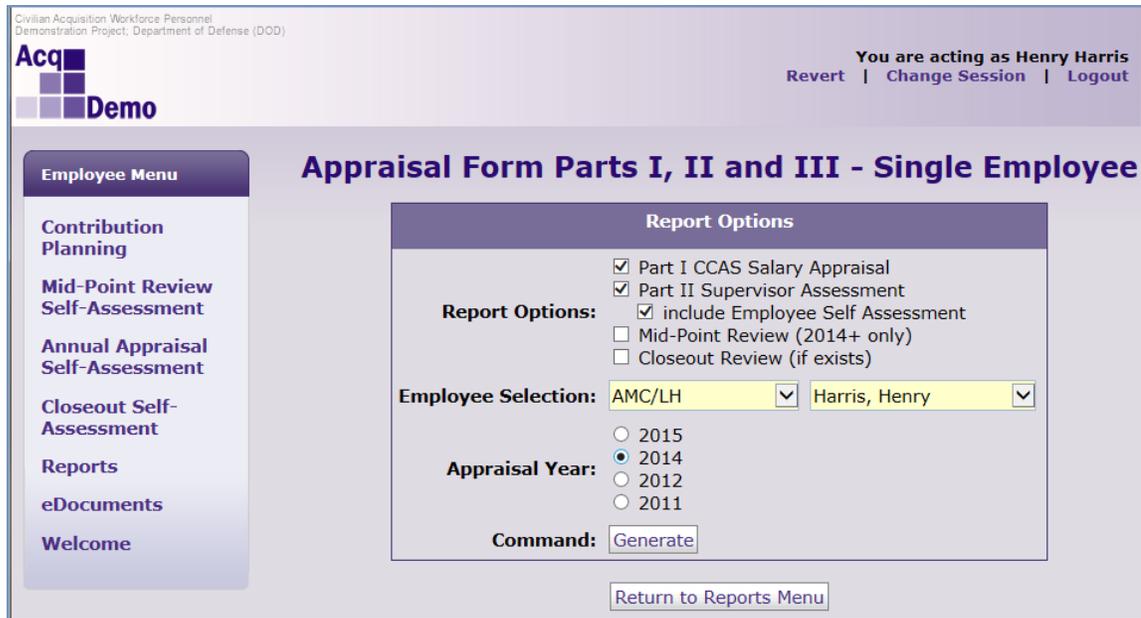


Figure 11-8: Appraisal Form Part I, II and III – Single Employee Selection

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

Part I: CCAS Salary Appraisal Form				
Name:	Adam A. Appleton	Series:	1550	Appraisal Period:
CAS2Net ID:	2612	Broadband Level:	III	From: 01-OCT-13
Organization:	AMC/LHA	Retained Pay:	No	To: 30-SEP-14
Career Path:	NH	Presumptive:	None	
Approved By: Bob Arnold, Pay Pool Manager		Effective Date of Appraisal: January 1, 2015		
Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.				
		Date		
		Date		
		Date		
2014 Appraisal Detail				
		<u>Factor</u>	<u>Category Score</u>	<u>Numeric Score</u>
Overall Contribution Score (OCS)	73	Problem Solving	3H	81
Expected Contribution Score:	70	Teamwork/Cooperation	3M	70
Expected Contribution Range	67 - 74	Customer Relations	3M	70
Delta OCS	3	Leadership/Supervision	3M	72
		Communication	3M	70
		Resource Management	3M	75
Compensation Detail				
	\$71,572	Current Rate of Base Pay		
+	\$716	General Pay Increase	1%	
+	\$500	CRI (Salary Increase)	.7%	
	\$72,788	New Rate of Base Pay		
+	\$17,629	Locality Pay	@ 24.22%	
	\$90,417	New Total Salary		
	\$200	Contribution Award		
2015 Expected Contribution Level				
	Expected Overall Contribution Score		70	
	Expected Contribution Range		67 - 74	
Privacy Act Statement (552a of 5 U.S.C.) 1. AUTHORITY: Section III(D), Federal Register Notice dated January 8, 1999. 2. PURPOSE: This form summarizes the annual evaluation of an employee's contribution through CCAS assessment. 3. ROUTINE USE: This form is a computer-generated form that is produced for each employee and contains the overall contribution score and space for the signature of the PPM, the supervisor, and the employee. The original of this form will be maintained in accordance with agency procedures.				
Employee Contribution Pay Comparison Chart				
Approved Compensation Region C2				
The graph plots the employee's current base salary versus the final OCS relative to the rails and standard pay line (SPL); relating contribution to compensation. The top and bottom lines are the Upper and Lower Rails, respectively. The middle line is the SPL. Region A is above the Upper Rail. Region B is below the Lower Rail. Region C is on or within the rails. Compensation regions determine the availability of salary increases and awards. The point on the graph below is the employee's appraisal result.				
Remarks				

Figure 11-9: Appraisal Form Part I, II and III – Single Employee, Part I

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton	RATER: George Fites	ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73
Contribution Planning: Appleton CP			

Figure 11-10: Appraisal Form Part I, II and III – Single Employee, Contribution Planning

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton		RATER: George Fites		ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73		
PART II Supervisor Assessment					
Instruction: Provide comments regarding employee's contribution against each factor during the current year and a score of each factor.				Categorical Score:	Numeric Score:
Problem Solving				3H	81
Test comments					
Teamwork/Cooperation				3M	70
Test comments					
Customer Relations				3M	70
Test comments					
Leadership/Supervision				3M	72
Test comments					
Communication				3M	70
Test comments					
Resource Management				3M	75
Test comments					

Figure 11-11: Appraisal Form Part I, II and III – Single Employee, Part II

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton		RATER: George Fites		ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73		
PART III Employee Self-Assessment					
Problem Solving					
test on 7/27					
Problem Solving - Danielle					
Teamwork/Cooperation					
Danielle					
Customer Relations					
Denielle					
Leadership/Supervision					
Denielle					
Communication					
Denielle					
Resource Management					
test on 7/27					
rezource management - Denielle					

Figure 11-12: Appraisal Form Part I, II and III – Single Employee, Part III

11.1.5 Mid-Point Review Self-Assessment

- From the Employee Reports menu, select Mid-Point Self-Assessment.
- CAS2Net displays the “Mid-Point Review Self-Assessment – Single Employee” for the employee.
- Click “Generate”.

Figure 11-13: Mid-Point Review Self-Assessment Report Options

- CAS2Net displays the Mid-Point Review Self-Assessment report (see figure: Sample Mid-Point Review Self-Assessment Report).

Figure 11-14: Sample Mid-Point Review Self-Assessment Report

11.1.6 Mid-Point Review

- From the CAS2Net employee reports menu, select Mid-Point Review.
- CAS2Net displays Mid-Point Review – Single Employee screen.
- CAS2Net displays Mid-Point Review report with the selected employee name print on the title (see figure: Mid-Point Review Report – Single Employee).



Figure 11-15: Mid-Point Review Report – Single Employee Selection

Mid-Point Review for Uli Ulanov
As of 03/14/12 11:11

Broadband Level: II	Occupational Series: 334 - Computer Specialist	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 48
-------------------------------	--	--	----------------------------

Contribution Planning:
Achieve best performance

ok

Overall Employee Self-Assessment:
Uli Ulanov provided this "overall employee self-assessment".

Problem Solving
Uli Ulanov: My problem solving skills are excellent.
Teamwork/Cooperation
Uli Ulanov: Teamwork and cooperation are strengths.
Customer Relations
Uli Ulanov: Customer feedback demonstrates that I relate well to our customers and respect their needs.
Leadership/Supervision
Uli Ulanov: Leadership and supervision do not apply to my position.
Communication
Uli Ulanov: I am very good at communicating with colleagues.
Resource Management
Uli Ulanov: I manage resources effectively.

Overall Supervisor Assessment:
Uli Ulanov exceeds expectations in her job performance--particularly with respect to customer relations. Customers are very satisfied with her dedicated support.

Problem Solving
Teamwork/Cooperation
Customer Relations
Uli Ulanov's always exceeds her customers' expectations.
Leadership/Supervision
Communication
Resource Management

Page 1 of 2

Mid-Point Review for Uli Ulanov
As of 03/14/12 11:11

Broadband Level: II	Occupational Series: 334 - Computer Specialist	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 48
-------------------------------	--	--	----------------------------

Resource Management

Method of Communication: TeleConference **Date Conducted:** 03/02/12

Figure 11-16: Mid-Point Review Report – Single Employee

11.1.7 Closeout Self-Assessment

- From the Employee Reports menu, select Mid-Point Self-Assessment.
- CAS2Net displays the “Mid-Point Review Self-Assessment – Single Employee” for the employee.
- Click “Generate”.



Figure 11-17: Closeout Self-Assessment Report Options

- CAS2Net displays the Mid-Point Review Self-Assessment report (see figure: Sample Mid-Point Review Self-Assessment Report).

Closeout Self-Assessment for Adam A Appleton			
Year: 2015			
First Level Supervisor: George Fites			
Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
III	1550 - Computer Science	NH - Business Management and Technical Management Professional	66 - 69 - 73
Start Date:	End Date:	As Of:	
10/01/2014	05/08/2015	05/08/15 13:19	
Reason for Closeout Assessment: Change in Supervisor			
Contribution Planning:			
Overall Employee Self-Assessment:			
The is the employee's overall self-assessment for the closeout period ending May 8, 2015.			
Problem Solving			
This is the employee's Problem Solving self-assessment for the closeout period ending May 8, 2015.			
Teamwork/Cooperation			
Customer Relations			
Leadership/Supervision			
Communication			
Resource Management			

Figure 11-18: Closeout Self-Assessment Report

11.1.8 Closeout Assessment

- From the CAS2Net employee reports menu, select Closeout Assessment.
- CAS2Net displays Closeout Assessment – Single Employee screen.
- CAS2Net displays Closeout Assessment report with the selected employee name print on the title (see figure: Closeout Assessment Report – Single Employee).



Figure 11-19: Closeout Assessment Report – Single Employee Selection

Closeout Assessment for Adam A Appleton			
Year: 2015			
First Level Supervisor: George Fites			
Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
III	1550 - Computer Science	NH - Business Management and Technical Management Professional	66 - 69 - 73
Start Date: 10/01/2014	End Date: 05/08/2015	As Of: 05/08/15 15:14	
Reason for Closeout Assessment: Change in Supervisor			
Contribution Planning: This is employee's individual objectives section of the Contribution Plan. And this is the supervisor's content for the Contribution Plan.			
Overall Employee Self-Assessment: The is the employee's overall self-assessment for the closeout period ending May 8, 2015.			
Problem Solving This is the employee's Problem Solving self-assessment for the closeout period ending May 8, 2015.			
Teamwork/Cooperation			
Customer Relations			
Leadership/Supervision			
Communication			
Resource Management			
Supervisor Assessment: This is supervisor's overall assessment for the closeout period ending May 8, 2015.			
Problem Solving This is supervisor's Problem Solving assessment for the closeout period ending May 8, 2015.			
Teamwork/Cooperation			
Customer Relations			
Leadership/Supervision			
Communication			
Resource Management			
Method of Communication:		Date Conducted:	

Figure 11-20: Closeout Assessment Report – Single Employee

11.2 Supervisor Reports

Clicking **Reports** in the supervisor menu of the left side navigation bar brings up a list of reports that are available to the supervisor role.



Figure 11-21: Supervisor Reports Menu

11.2.1 Contribution Planning – Single Employee

- From the Supervisor Reports menu, select Contribution Planning – Single Employee.
- CAS2Net displays Contribution Plan – Employee screen (see figure: Contribution Planning Report – Single Employee Selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays Contribution Planning report with the selected employee name print on the title (see figure: Contribution Planning Report – Single Employee)



Figure 11-22: Contribution Planning Report – Single Employee Selection

Contribution Planning for Henry Harris			
Year: 2011			
Broadband Level: II	Occupational Series: 830 - Mechanical Engineering	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 48
Contribution Planning: The mechanical Engineering often works between the craftperson and the engineer. He or she differs from the craftperson by having detailed knowledge of the scientific and engineering theory behind the operation, and differs from the mechanical engineer by having intimate knowledge of the technical and fabrication procedures required for the production of goods and services. With this useful skill-set the technologist often moves into first-line supervisory positions.			
Method of Communication: Email		Date Conducted: 10-AUG-11	

Figure 11-23: Contribution Planning Report – Single Employee

11.2.2 Contribution Planning – All Employees

- From the Supervisor Reports menu, select Contribution Planning – All Employees.
- CAS2Net displays Contribution Plan screen.
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays Contribution Planning reports of all employees, with each employee name print on the title of each employee Contribution Planning report (Note: All Employees report format is the same as Single Employee format, see figure: Contribution Planning Report – Single Employee for example).

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

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Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning

Contribution Plan by Supervisor

Report Options

Selection Type: All Pay Pools' Supervisors

Supervisor Selection: AMC/LH Fites, George ▾

Supervisor Type: First Level Supervisor

2016
 2015
 2014
 2013
 2012
 2011

Assessment Year:

Report Format: PDF format* is standard for this report

Command:

Figure 11-24: Contribution Planning Report – All Employees Selection

11.2.3 Additional Feedback – Single Employee

- From the Supervisor Reports menu, select Additional Feedback – Single Employee.
- CAS2Net displays Additional Feedback – Employee screen (see figure: Sample Additional Feedback Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays Additional Feedback report with the selected employee name print on the title (see figure: Sample Additional Feedback Report – Single Employee).



Figure 11-25: Additional Feedback Report – Single Employee Selection

11.2.4 Additional Feedback – All Employees

- From the Supervisor Reports menu, select Additional Feedback – All Employees.
- CAS2Net displays Additional Feedback screen (see figure: Sample Additional Feedback Report - All Employees selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays Additional Feedback reports of all employees, with each employee name print on the title of each employee Additional Feedback report.

(Note: All Employees report format is the same as Single Employee format, see figure: Sample Additional Feedback Report – Single Employee for example).

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Additional Feedback - All Employees

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning

Report Options

Selection Type: All Pay Pools' Supervisors

Supervisor Selection: AMC/LH Fites, George

Supervisor Type: First Level Supervisor

2015

2014

Assessment Year: 2013

2012

2011

Report Format: PDF format* is standard for this report

Command:

Figure 11-27: Additional Feedback Report - All Employees Selection

11.2.5 Appraisal Form Parts I, II and III – Single Employee

- From the Supervisor Reports menu, select Appraisal Form Parts I, II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts I, II and III screen (see figure: Sample Appraisal Form Parts II and III – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays CCAS Salary Appraisal Document report in three parts: Part I – Contribution Planning, Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figure: Appraisal Form Parts II and III – Single Employee, Part II and figure: Appraisal Form Parts II and III – Single Employee, Part III).

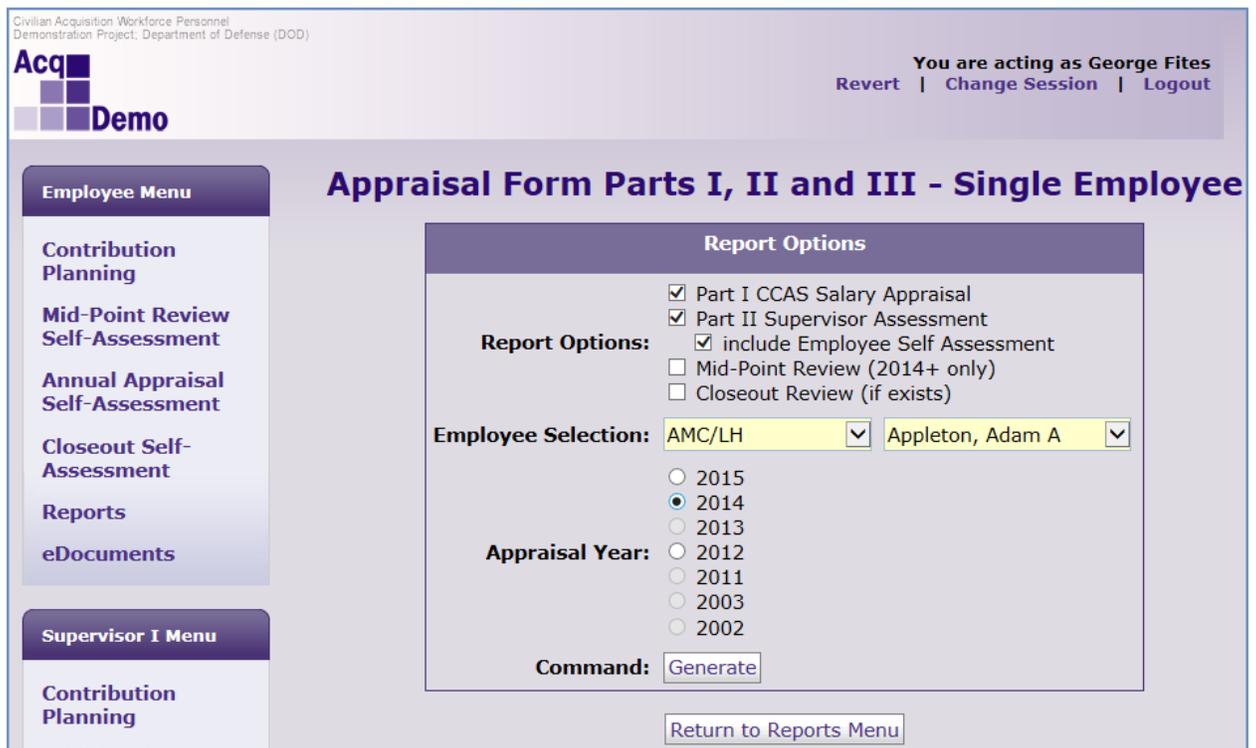


Figure 11-28: Appraisal Form Parts I, II and III – Single Employee Selection

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

Part I: CCAS Salary Appraisal Form				
Name:	Adam A. Appleton	Series:	1550	Appraisal Period:
CAS2Net ID:	2612	Broadband Level:	III	From: 01-OCT-13
Organization:	AMC/LHA	Retained Pay:	No	To: 30-SEP-14
Career Path:	NH	Presumptive:	None	
Approved By: Bob Arnold, Pay Pool Manager		Effective Date of Appraisal: January 1, 2015		
Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.				
		Date		
Supervisor Print / Sign		Date		
Employee Print / Sign		Date		
2014 Appraisal Detail				
		<u>Factor</u>	<u>Category Score</u>	<u>Numeric Score</u>
Overall Contribution Score (OCS)	73	Problem Solving	3H	81
Expected Contribution Score:	70	Teamwork/Cooperation	3M	70
Expected Contribution Range	67 - 74	Customer Relations	3M	70
Delta OCS	3	Leadership/Supervision	3M	72
		Communication	3M	70
		Resource Management	3M	75
Compensation Detail				
\$71,572	Current Rate of Base Pay			
+	\$718	General Pay Increase		1%
+	\$500	CRI (Salary Increase)		.7%
\$72,788	New Rate of Base Pay			
+	\$17,629	Locality Pay @		24.22%
\$90,417	New Total Salary			
\$200	Contribution Award			
2015 Expected Contribution Level				
Expected Overall Contribution Score	70			
Expected Contribution Range	67 - 74			
Privacy Act Statement (552a of 5 U.S.C.) 1. AUTHORITY: Section III.D, Federal Register Notice dated January 8, 1999. 2. PURPOSE: This form summarizes the annual evaluation of an employee's contribution through CCAS assessment. 3. ROUTINE USE: This form is a computer-generated form that is produced for each employee and contains the overall contribution score and space for the signature of the PPM, the supervisor, and the employee. The original of this form will be maintained in accordance with agency procedures.				
Employee Contribution Pay Comparison Chart				
Approved Compensation Region C2				
The graph plots the employee's current base salary versus the final OCS relative to the rails and standard pay line (SPL); relating contribution to compensation. The top and bottom lines are the Upper and Lower Rails, respectively. The middle line is the SPL. Region A is above the Upper Rail. Region B is below the Lower Rail. Region C is on or within the rails. Compensation regions determine the availability of salary increases and awards. The point on the graph below is the employee's appraisal result.				
<p style="text-align: center; font-size: small;">Overall Contribution Score</p>				
Remarks				

Figure 11-29: Appraisal Form Parts I, II and III – Single Employee, Part I

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton	RATER: George Fites	ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73
Contribution Planning: Appleton CP			

Figure 11-30: Appraisal Form Parts I, II and III – Single Employee, Contribution Planning

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton		RATER: George Fites		ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73		
PART II Supervisor Assessment					
Instruction: Provide comments regarding employee's contribution against each factor during the current year and a score of each factor.				Categorical Score:	Numeric Score:
Problem Solving				3H	81
Test comments					
Teamwork/Cooperation				3M	70
Test comments					
Customer Relations				3M	70
Test comments					
Leadership/Supervision				3M	72
Test comments					
Communication				3M	70
Test comments					
Resource Management				3M	75
Test comments					

Figure 11-31: Appraisal Form Parts I, II and III – Single Employee, Part II

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

NAME: Adam A. Appleton		RATER: George Fites		ORG: AMC/LH	
Broadband Level: III	Occupational Series: 1550 - Computer Science	Career Path: NH - Business Management and Technical Management Professional	OCS: 73		
PART III Employee Self-Assessment					
Problem Solving					
test on 7/27					
Problem Solving - Danielle					
Teamwork/Cooperation					
Danielle					
Customer Relations					
Denielle					
Leadership/Supervision					
Denielle					
Communication					
Denielle					
Resource Management					
test on 7/27					
resource management - Denielle					

Figure 11-32: Appraisal Form Parts I, II and III – Single Employee, Part III

11.2.6 Appraisal Form Parts I, II and III – All Employees

- From the Supervisor Reports menu, select Appraisal Form Parts I, II and III – All Employees.
- CAS2Net displays Appraisal Form Parts I, II and III screen (see figure: Appraisal Form Parts I, II and III - All Employees selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays all employees' CCAS Salary Appraisal Document reports:
 - CCAS Salary Appraisal Document cover page: supervisor name, supervisor role, year of performance (see figure: Sample Annual Appraisal Report Parts II and III – All Employees, cover page).
 - CCAS Salary Appraisal Document reports of all employees, each employee's report contains two parts: Part II – Supervisor Assessment and Part III – Employee Self-Assessment.

(Note: All Employees report format is the same as Single Employee format, see figures: Appraisal Form Parts I, II and III – Single Employee, Part I; Appraisal Form Parts I, II and III – Single Employee, Part II; and Appraisal Form Parts I, II and III – Single Employee, Part III for example).

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You are acting as George Fites
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Appraisal Form Parts I, II & III - By Supervisor

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal

Report Options

Report Options:

- Part I CCAS Salary Appraisal
- Part II Supervisor Assessment
- include Employee Self Assessment
- Mid-Point Review

Selection Type: Self as supervisor

Supervisor Selection: Fites, George

Supervisor Type: First Level Supervisor

- 2015
- 2014
- 2013
- 2012
- 2011
- 2003
- 2002
- 2001

Assessment Year:

Report Format: PDF format* is standard for this report

Command:

Figure 11-33: Appraisal Form Parts I, II and III – All Employees Selection

CCAS Appraisal By Supervisor Report	
Group: Supervisor: George Fites Supervisor Role: First Level Supervisor	Criteria: Supervisor: George Fites Supervisor Role: First Level Supervisor Assessments Year: 2014

Figure 11-34: Annual Appraisal Report Parts I, II and III – All Employees, Cover Page

11.2.7 Mid-Point Review – Single Employee

- From the Supervisor Reports menu, select Mid-Point Review – Single Employee.
- CAS2Net displays Mid-Point Review – Employee screen (see figure: Sample Mid-Point Review Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- CAS2Net displays Mid-Point Review report with the selected employee name print on the title (see figure: Sample Mid-Point Review Report – Single Employee).



Figure 11-35: Mid-Point Review Report – Single Employee Selection

Mid-Point Review for Uli Ulanov
As of 03/14/12 11:11

Broadband Level: II	Organizational Series: 334 - Computer Specialist	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 45
-------------------------------	--	---	----------------------------

Contribution Planning:
Achieve best performance

ck

Overall Employee Self-Assessment:
Uli Ulanov provided this "overall employee self-assessment".

Problem Solving
Uli Ulanov: My problem solving skills are excellent.
Teamwork/Cooperation
Uli Ulanov: Teamwork and cooperation are strengths.
Customer Relations
Uli Ulanov: Customer feedback demonstrates that I relate well to our customers and respect their needs.
Leadership/Supervision
Uli Ulanov: Leadership and supervision do not apply to my position.
Communication
Uli Ulanov: I am very good at communicating with colleagues.
Resource Management
Uli Ulanov: I manage resources effectively.

Overall Supervisor Assessment:
Uli Ulanov exceeds expectations in her job performance—particularly with respect to customer relations. Customers are very satisfied with her dedicated support.

Problem Solving
Teamwork/Cooperation
Customer Relations
Uli Ulanov's always exceeds her customers' expectations.
Leadership/Supervision
Communication
Resource Management

Page 1 of 2

Mid-Point Review for Uli Ulanov
As of 03/14/12 11:11

Broadband Level: II	Organizational Series: 334 - Computer Specialist	Career Path: NH - Business Management and Technical Management Professional	Expected OCS: 45
-------------------------------	--	---	----------------------------

Resource Management

Method of Communication: TeleConference **Date Conducted:** 03/02/12

Figure 11-36: Mid-Point Review Report – Single Employee

11.2.8 Mid-Point Review – All Employees

- From the Supervisor Reports menu, select Mid-Point Review – All Employees.
- CAS2Net displays Mid-Point Review screen (see figure: Sample Mid-Point Review Report - All Employees selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- CAS2Net displays Mid-Point Review reports of all employees, with each employee name print on the title of each employee Mid-Point Review report.

(Note: All Employees report format is the same as Single Employee format, see figure: Mid-Point Review Report – Single Employee for example).

The screenshot shows the CAS2NET interface for generating a Mid-Point Review report for all employees. The page title is "Mid-Point Review - All Employees". The user is logged in as "Ike Hansen". The interface includes a navigation menu on the left with options like "Employee Menu", "Supervisor I Menu", "Contribution Planning", "Mid-Point Review Self-Assessment", "Annual Appraisal Self-Assessment", "Closeout Self-Assessment", "Reports", and "eDocuments". The main content area is titled "Report Options" and contains the following fields:

- Selection Type:** All Pay Pools' Supervisors
- Supervisor Selection:** AMC/LH Hansen, Ike (dropdown menu)
- Supervisor Type:** First Level Supervisor
 - 2015
 - 2014
- Assessment Year:** 2013
 - 2012
 - 2011
- Override:** Include not-yet-released reviews?
- Report Format:** PDF format* is standard for this report
- Command:**

At the bottom of the form is a "Return to Reports Menu" button.

Figure 11-37: Mid-Point Review Report – All Employees Selection

11.2.9 Closeout Assessment – Single Employee

- From the Supervisor Reports menu, select Closeout Assessment – Single Employee.
- From the Employee Selection Drop Down list Boxes select the Pay Pool and Employee Name
- Available Assessments will be listed as option buttons in the Appraisal Year Section.
- Select desired appraisal year and then click the “Generate” button.

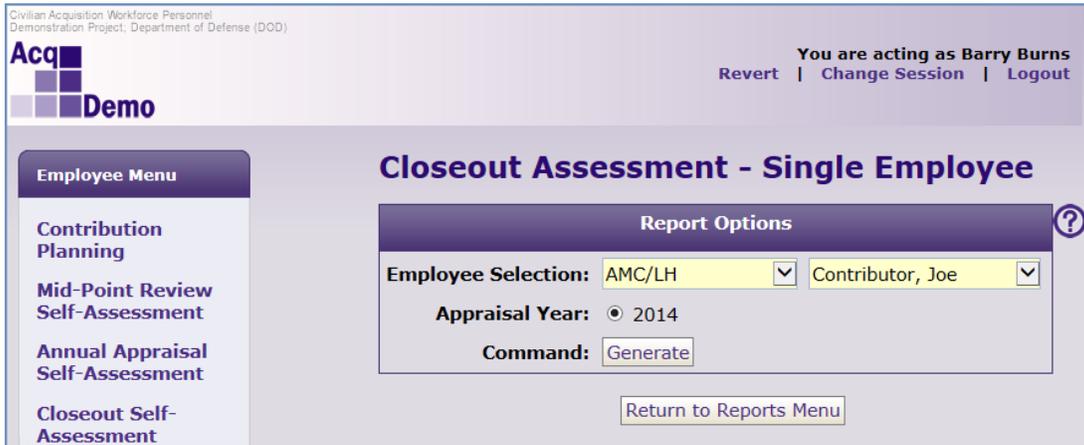


Figure 11-38: Closeout Assessment – Single Employee

Closeout Assessment for Joe Contributor
Year: 2014

First Level Supervisor: Barry Burns

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
III	801 - General Engineering	NH - Business Management and Technical Management Professional	63 - 67 - 70

Start Date: 10/01/2013 **End Date:** 08/23/2014 **As Of:** 03/18/14 13:33

Reason for Closeout Assessment: Change in Position

Contribution Planning:

1. Studies and defines TPG's current test mission at XPG concerning Electronic Warfare (EW) Compatibility Testing.
 Success will be met through the act of a written account and exceeded by management's endorsement of the Ratee's recommended improvements and insights to the new test mission.
2. Learns the Electronic Warfare Group's test functions/processes that support the Air Combat Systems Directorate.
 Success will be met through oral discussions showing the Ratee's obvious comprehension of one or more test functions/processes; Exceeds through favorable peer review or benefits gained through the Ratee's learned expertise/subject improvements.
3. Researches and documents existing assignments.
 Success will be met through producing researched documents on current assignments; Exceeds by sheer quality and quantity of effort researched as evidenced by colleague and management review.
4. Recommends equipment and process improvements to enhance the capabilities and products of the Electronic Warfare Group.
 Success will be measured through making recommendations; Exceeds through implementation efforts showing real improvements to the process concerning cost savings, time of effort, safety, troubleshooting or data quality.
5. Mandated objectives:
 - a. Pursue Army Acquisition Corps certification at appropriate level as required.
 - b. Complete all mandatory training.
 - c. Post AAC Continuous Learning Points as earned, a minimum of 40 per year with at least 20 being technical, with the remainder from the mandatory training matrix.
 - d. Update and complete the annual portion of IDP.
 - e. Ensure all travel authorizations and vouchers are prepared IAW Joint Travel Regulations and Government Travel Card use is IAW DoD FMR 7000.14-R, Vol. 9, Chapter 3.
 - f. Participate in assigned Lean Six Sigma Improvement projects, if applicable.
 - g. Provide input for facilities, investment programs and data calls as required.
 Exceeds by having no issues involving meeting suspense or noncompliance in any of the above objectives

Overall Employee Self-Assessment:

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Figure 11-39: Closeout Assessment – Single Employee

11.2.10 Closeout Assessment – All Employees

- From the Supervisor Reports menu, select Closeout Assessment – All Employees.
- From the Supervisor Selection Drop Down list Boxes select the Supervisor Name
- Select the Supervisor Type option button
- Available Assessments will be listed as option buttons in the Appraisal Year Section.
- Click the “Generate” button.



Figure 11-39: Closeout Assessment – All Employees

Closeout Assessment for Joe Contributor
Year: 2015

First Level Supervisor: Barry Burns

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
III	801 - General Engineering	NH - Business Management and Technical Management Professional	65 - 68 - 72

Start Date: 10/01/2014 **End Date:** 02/17/2015 **As Of:**

Reason for Closeout Assessment: Other
Dummy

Contribution Planning:

Overall Employee Self-Assessment:
Supervisor Assessment:
Method of Communication: **Date Conducted:**

Figure 11-40: Closeout Assessment – All Employees

11.3 Administrative Reports

Clicking **Reports** in the navigation menu of any CAS2Net manager or administrator user provides access to combinations of supervisor and administrative reports, depending on the specified role.

This section documents the administrative reports that provide information for managing pay pools and employees as they participate in CAS2Net—including:

- Contribution Planning – Single Employee ([See 11.2.1](#))
- Contribution Planning – All Employees ([See 11.2.2](#))
- Additional Feedback – Single Employee ([See 11.2.3](#))
- Additional Feedback – All Employees ([See 11.2.4](#))
- Appraisal Form Parts I, II and III – Single Employee ([See 11.2.5](#))
- Appraisal Form Parts I, II and III – All Employees ([See 11.2.6](#))
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review – Single Employee ([See 11.2.7](#))
- Mid-point Review – All Employees ([See 11.2.8](#))
- Closeout Assessment – Single Employee ([See 11.2.8](#))
- Closeout Assessment – All Employees ([See 11.2.9](#))
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor

Note. Section 11.2 Supervisor Reports details employee assessment reports available to all supervisors.

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Pay Pool Administrator Menu

- Welcome
- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Pay Pool Notices
- eDocuments

Reports

Pay Pool Administrator Reports

- Contribution Planning - Single Employee
- Contribution Planning - All Employees
- Additional Feedback - Single Employee
- Additional Feedback - All Employees
- Appraisal Form Parts I, II and III - Single Employees
- Appraisal Form Parts I, II and III - All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review - Single Employee
- Mid-Point Review - All Employees
- Closeout Assessment - Single Employee
- Closeout Assessment - All Employees
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor

Figure 11-41: Pay Pool Administrator Reports Menu

11.3.1 CAS2Net Status Report & Excel Spreadsheet

The CAS2Net Status Report summarizes status information for all current year employee assessments within a pay pool.

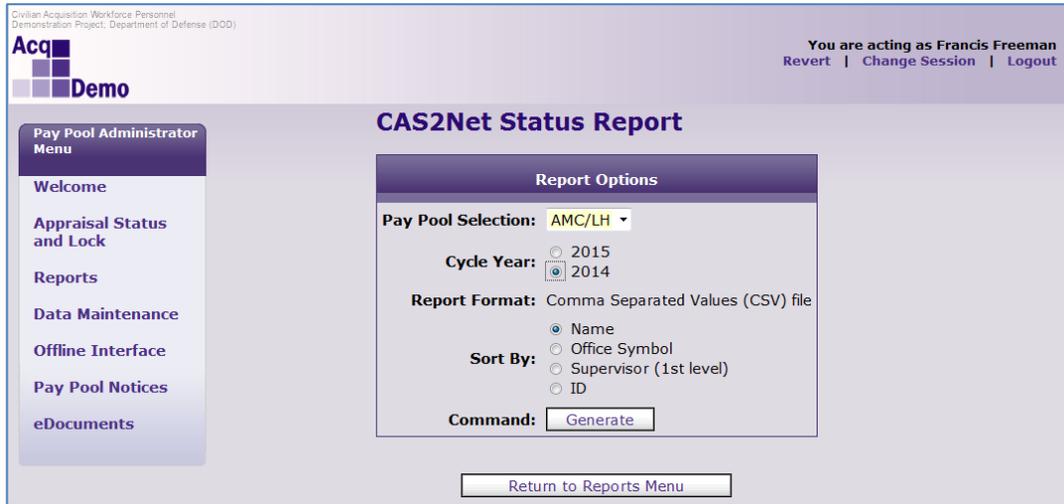


Figure 11-42: CAS2Net Status Report

1	Paypool	AMC/LH	As Of:	28-Sep-12									
2	Emp ID	Last Name	First Name	Office Symbol	Supervisor	Sub-Panel Mgr	AcqDemo Start Date	CP Emp Input	CP Supv Approval	Mid-Point Review	Self Assessment	Annual Appraisal	
3	2612	Appleton	Adam		Helen Gonzalez	Sam Battista	1-Jan-11	Y			Y	Y	
4	43	Arndt	Aaron	AMC/LHXT	Helen Gonzalez	Nancy Michelson	1-Feb-99	Y	Y			Y	
5	19	Artis	Amy	AMC/LHXT	Helen Gonzalez	Helen Gonzalez	1-Feb-99	Y	Y		Y	Y	
6	15	Babbitt	Chris	AMC/LHXS	Helen Gonzalez	Francis Evans	24-Oct-00	Y				Y	
7	2614	Bracken	Billy	AMC/LH	Peter Olson	Dan Curtiss	1-Jan-11	Y					
8	1843	Burns	Barry	AMC/LHAC	Helen Gonzalez	Helen Gonzalez	12-Aug-01	Y	Y	Y		Y	
9	44	Butler	Bryce	AMC/LHXT	George Fites	Nancy Michelson	1-Feb-99					Y	
10	45	Cavazos	Carmen	AMC/LHXT	Ike Hansen	Nancy Michelson	1-Feb-99	Y	Y			Y	
11	21	Celon	Connie	AMC/LHAC	Peter Olson	Helen Gonzalez	1-Aug-03						
12	4	Curtiss	Dan	AMC/LHA	Ike Hansen		1-Feb-99					Y	
13	46	Dancy	Dyanne	AMC/LHXT	Ike Hansen	Nancy Michelson	1-Feb-99	Y	Y			Y	
14	22	Donaldson	Dennis	AMC/LHAC	Richard Quarles	Helen Gonzalez	1-Feb-99	Y	Y	Y		Y	
15	47	Emerson	Erica	AMC/LHXT	Ike Hansen	Nancy Michelson	1-Feb-99					Y	
16	23	Evans	Erin	AMC/LHAC	Richard Quarles	Helen Gonzalez	1-Feb-99					Y	
17	5	Evans	Francis	AMC/LHX	Ike Hansen		1-Feb-99					Y	
18	24	Farnsworth	Fred	AMC/LHAC	Richard Quarles	Helen Gonzalez	1-Feb-99					Y	
19	17	Fites	George	AMC/LHXT	Nancy Michelson	Francis Evans	1-Feb-99					Y	
20	2	Freeman	Francis	AMC/LH	Ike Hansen		1-Feb-99					Y	

Figure 11-43: Status Report Spreadsheet

Contribution Planning Status

- From the Pay Pool Administrator Reports menu, select Contribution Planning Status.
- CAS2Net displays Pay Pool Selection list box.
- Select Pay Pool from Pay Pool list box.
- Select Cycle Year from the list of available cycle years
- Select Report Format, either PDF or Excel
- Select sort criteria from available option buttons
- Click the “Generate” Button

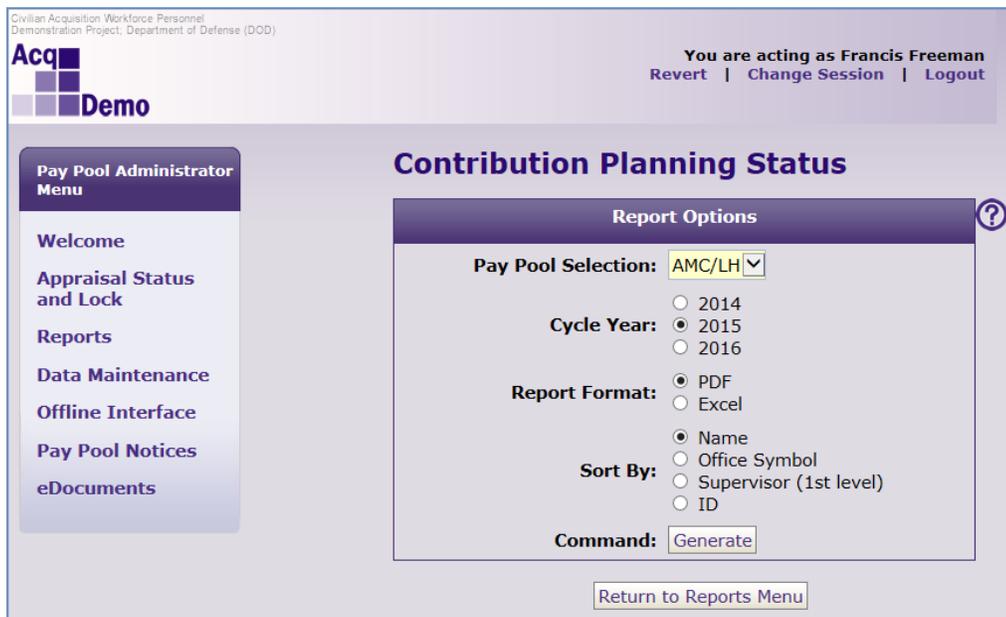


Figure 11-44: CAS2Net Status Report



Contribution Planning Status Report

Pay Pool: AMC/LH Cycle Year: 2015

ID	Last Name	First Name	MI	SSN (last 4)	Office Symbol	Supervisor	Employee Input Status	Contrib. Planning Status
19	Artis	Amy		3720		Barry Burns	INCOMPLETE	INCOMPLETE
20	Burns	Barry		6289	AMC/LHAA	Dan CURTISS	COMPLETED	COMPLETED
48720	Case10	Connie		1930		Erin Evans	NONE	NONE
25	Case11	Garth		5297	AMC/LHAA	Barry Burns	NONE	INCOMPLETE
26	Case12	Henry		1312			NONE	NONE
2	Case1	Francis		3911	AMC/LH	Bob Arnold	NONE	NONE
27	Case2	George		3912	AMC/LHAB	Erin Evans	NONE	NONE
23973	Case3	Dan		1913			NONE	NONE
58722	Case4	Helena		1934			NONE	NONE
11	Case5	Richard		1935	AMC/LHBA	Jane Jerris	NONE	NONE
48719	Case6	Nancy		1936		Dan CURTISS	NONE	NONE
12	Case7	Tammy		1977	AMC/LHBB	Mary Martinez	NONE	NONE
68968	Case8	Vincent		1938			NONE	NONE
22711	Case9	Erin		1399			NONE	NONE
39775	Contributor	Joe		5456		Barry Burns	NONE	NONE
27551	Contributor	Joe		3334		Barry Burns	COMPLETED	COMPLETED
4	Curtiss	Dan		9047	AMC/LHA	Bob Arnold	NONE	NONE
22	Donaldson	Dennis		3941	AMC/LHAA	Barry Burns	NONE	COMPLETED

Figure 11-45: Appraisal Form Part I, II and III – Single Employee Selection

11.3.2 Download Employee Data

Presents employees within a pay pool's information based on selected data fields.

	A	B	C	D	E	F	G	T	U	V	W	X	Y
1	Paypool	1st Level Supervisor	ID#	Last Name	First Name	Start Date	Locality Code						
2	AMC/LH	George Fites	43	Arndt	Aaron	1-Feb-99	LA						
3	AMC/LH	Peter Olson	19	Artis	Amy	1-Feb-99	LA						
4	AMC/LH	Larry Koening	15	Babbitt	Chris	25-Oct-00	NA						
5	AMC/LH	Peter Olson	1843	Burns	Barry	12-Aug-01	LA						
6	AMC/LH	George Fites	44	Butler	Bryce	1-Feb-99	LA						
7	AMC/LH	Ike Hansen	45	Cavasos	Carmen	1-Feb-99	LA						
8	AMC/LH	Peter Olson	21	Celon	Connie	1-Aug-03	LA						
9	AMC/LH	Bob Arnold	4	Curtiss	Dan	1-Feb-99	LA						
10	AMC/LH	Ike Hansen	46	Dancy	Dyanne	1-Feb-99	LA						
11	AMC/LH	Richard Quarles	22	Donaldson	Dennis	1-Feb-99	LA						
12	AMC/LH	Ike Hansen	47	Emerson	Erica	1-Feb-99	LA						
13	AMC/LH	Richard Quarles	23	Evans	Erin	1-Feb-99	LA						
14	AMC/LH	Bob Arnold	5	Evans	Francis	1-Feb-99	LA						
15	AMC/LH	Richard Quarles	24	Farnsworth	Fred	1-Feb-99	LA						
16	AMC/LH	Nancy Michelson	17	Fites	George	1-Feb-99	LA						
17	AMC/LH	Bob Arnold	2	Freeman	Francis	1-Feb-99	LA						
18	AMC/LH	Bob Arnold	3	Garfield	George	1-Feb-99	LA						
19	AMC/LH	Dan Curtiss	6	Gonzalez	Helen	15-May-03	LA						
20	AMC/LH	Richard Quarles	25	Grimes	Garth	1-Feb-99	LA						
21	AMC/LH	Nancy Michelson	18	Hansen	Ike	1-Feb-99	LA						
22	AMC/LH	Tammy Stewart	26	Harris	Henry	1-Feb-99	LA						
23	AMC/LH	Tammy Stewart	27	Irnski	Ivan	1-Feb-99	LA						
24	AMC/LH	Dan Curtiss	7	Iverson	John	1-Feb-99	LA						
25	AMC/LH	Tammy Stewart	28	Jerris	Jane	1-Feb-99	LA						
26	AMC/LH	Vincent Udell	29	Karnes	Keith	1-Feb-99	LA						
27	AMC/LH	Vincent Udell	30	Lawrence	Lance	1-Feb-99	LA						
28	AMC/LH	Vincent Udell	31	Martinez	Mary	1-Feb-99	LA						
29	AMC/LH	Francis Evans	1472	Michelson	Nancy	29-Sep-00	LA						
30	AMC/LH	Vincent Udell	32	Nance	Nolan	1-Feb-99	LA						
31	AMC/LH	Zane Yates	33	O'Connor	Olive	1-Feb-99	LA						

Figure 11-46: Download Employee Data – Excel Worksheet

11.3.3 Employee Roster Report

Use the Employee Roster Report to print and review the list of employees assigned to your pay pool. Check to see if any demo employees are missing from your pay pool. If they are, they may be in “Transfer Pay Pool”.

Click “Reports” from the navigation bar. CAS2Net refreshes the screen to display the list of reports.

Click the “Employee Roster” link from the reports list.

CAS2Net refreshes to display the “Employee Roster Report” screen.

The screenshot shows the CAS2NET interface for the Employee Roster Report. At the top left, it says "Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)" and "Acq Demo". At the top right, it says "You are acting as Francis Freeman" with links for "Revert", "Change Session", and "Logout". On the left is a "Pay Pool Administrator Menu" with options: Welcome, Appraisal Status and Lock, Reports, Data Maintenance, Offline Interface, Pay Pool Notices, and eDocuments. The main area is titled "Employee Roster" and contains a "Report Options" box. Inside this box, there is a "Pay Pool Selection" dropdown menu set to "AMC/LH". Below that are radio buttons for "Option": "USAF" and "All other" (selected). Then "Report Format" with radio buttons for "PDF" (selected), "Excel", and "Office Symbol". Then "Sort By" with radio buttons for "Name" (selected), "ID", and "Office Symbol". At the bottom of the box is a "Command:" label and a "Generate" button. Below the "Report Options" box is a "Return to Reports Menu" button.

Figure 11-47: Employee Roster Report Selection

Select your pay pool from the Pay pool Selection dropdown (Only two choices for Pay Pool Administrators).

Before the report is generated, you have the option to sort the data by Name, Office Symbol, or ID. Select the desired “sort by” radio button.

Click the “Generate” button.

CAS2Net opens a new window to display the generated Employee Roster Report.



Employee Roster

Pay Pool: **AMC/LH**

ID	Last Name	First Name	MI	Suffix	SSN (last 4)	Office Symbol	Presumptive Status	Retain Pay	Career Path	BB Level	Occ Series	Base Salary	Locality Code	CCPO	Prev OCS	Start Date
43	Amdt	Aaron			0138	AMC/LHXTA	Cirroum (recentify)	N	NK	2	0322	\$0 41	9L	n/a	n/a	01-FEB-99
19	Artis	Amy			3720	AMC/LHACA	None	N	NH	2	0318	\$0 41	9L	n/a	n/a	01-FEB-99
15	Babbitt	Chris			0912	AMC/LHXSA	None	N	NH	3	0803	\$0 99	9L	n/a	n/a	25-OCT-00
1843	Burns	Barry			6289	AMC/LHACA	None	N	NH	2	1515	\$0 41	9L	n/a	n/a	12-AUG-01
44	Buter	Bryce			0219	AMC/LHXTA	None	N	NH	3	0025	\$0 41	9L	n/a	n/a	01-FEB-99
45	Cavasos	Carmen			7986	AMC/LHXTB	None	N	NH	2	0246	\$0 41	9L	n/a	n/a	01-FEB-99
21	Ceion	Connie			4913	AMC/LHACA	Time	N	NH	3	0334	\$0 41	9L	n/a	n/a	01-AUG-03
4	Curtiss	Dan			9047	AMC/LHA	None	N	NH	4	0830	\$0 41	9L	n/a	n/a	01-FEB-99
46	Dancy	Dyanne			0943	AMC/LHXTB	None	N	NK	1	0322	\$0 41	9L	n/a	n/a	01-FEB-99
22	Donaldson	Dennis			3941	AMC/LHACB	None	N	NK	2	0318	\$0 41	9L	n/a	n/a	01-FEB-99
47	Emerson	Erica			8834	AMC/LHXTB	Cirroum (recentify)	N	NH	2	0341	\$0 41	9L	n/a	n/a	01-FEB-99
23	Evans	Erin			3175	AMC/LHACB	None	N	NH	3	0830	\$0 41	9L	n/a	n/a	01-FEB-99
5	Evans	Francis			9045	AMC/LHX	None	N	NH	4	0830	\$0 41	9L	n/a	n/a	01-FEB-99
24	Farnsworth	Fred			7422	AMC/LHACB	None	N	NH	2	0830	\$0 41	9L	n/a	n/a	01-FEB-99
17	Files	George			8173	AMC/LHXTA	None	N	NH	3	0896	\$0 41	9L	n/a	n/a	01-FEB-99
2	Freeman	Francis			9153	AMC/LH	None	Y	NK	2	0318	\$0 41	9L	n/a	n/a	01-FEB-99
3	Garfield	George			8079	AMC/LH	None	N	NJ	4	0856	\$0 41	9L	n/a	n/a	01-FEB-99
6	Gonzalez	Heleen			0075	AMC/LHAC	None	N	NH	4	0340	\$0 41	9L	n/a	n/a	15-MAY-03
25	Grimes	Garth			5297	AMC/LHACB	None	N	NH	2	0850	\$0 41	9L	n/a	n/a	01-FEB-99
18	Hansen	Ike			3651	AMC/LHXTB	None	N	NH	3	0830	\$0 41	9L	n/a	n/a	01-FEB-99
26	Harris	Henry			3813	AMC/LHADA	None	N	NH	2	0830	\$0 41	9L	n/a	n/a	01-FEB-99
27	Innski	Ivan			6297	AMC/LHADA	None	N	NK	3	0085	\$0 41	9L	n/a	n/a	01-FEB-99
7	Iverson	John			1132	AMC/LHAD	None	N	NH	4	0830	\$0 41	9L	n/a	n/a	01-FEB-99
28	Jerks	Jane			8347	AMC/LHADA	None	N	NH	3	0830	\$0 41	9L	n/a	n/a	01-FEB-99

Figure 11-48: Employee Roster Report

11.3.4 Post Cycle Activity Report

Produces a list of employees based on leavers, joiners, temporary promotions, permanent promotions, and demotions.



Figure 11-49: Post-Cycle Activity Menu

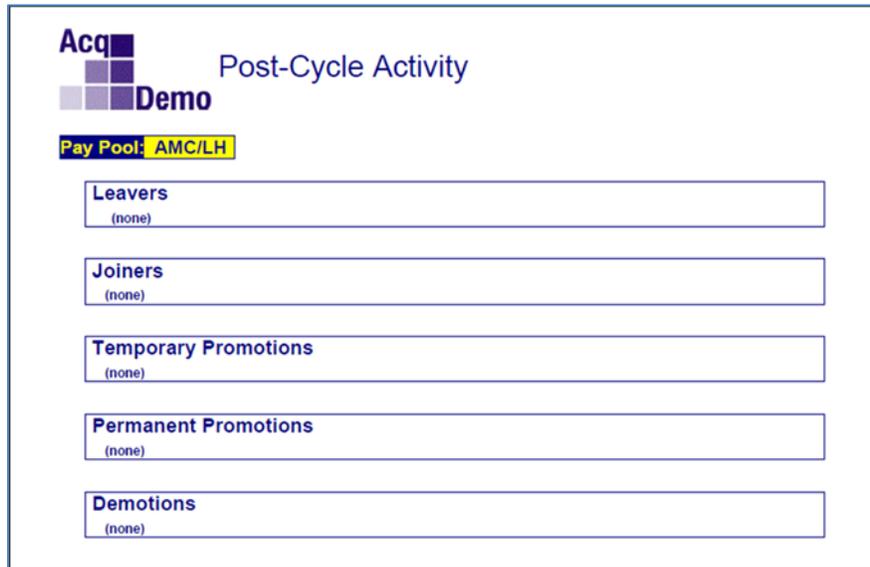


Figure 11-50: Post Cycle Activity Report

11.3.5 Supervisor Roster by Employee Report

Presents a list of employees and their supervisor.



Figure 11-51: Supervisor Roster by Employee Report Selection



Supervisor Roster by Employee

Employee Name	Supervisor, Level 1	Sub-panel Supervisor	Paypool Manager
Amdt, Aaron, AMC/LHXTA	George Fites	Nancy Michelson	Bob Arnold
Artis, Amy, AMC/LHXTA			
Babbitt, Chris, AMC/LHXSA	Larry Koenig	Francis Evans	Bob Arnold
Bums, Barry, AMC/LHACA	Peter Olson	Helen Gonzalez	Bob Arnold
Butler, Bryce, AMC/LHXTA	George Fites	Nancy Michelson	Bob Arnold
Cavasos, Carmen, AMC/LHXTB	Ike Hansen	Nancy Michelson	Bob Arnold
Celon, Connie, AMC/LHACA	Peter Olson	Helen Gonzalez	Bob Arnold
Curtiss, Dan, AMC/LHA	Bob Arnold		Bob Arnold
Dancy, Dyanne, AMC/LHXTB	Ike Hansen	Nancy Michelson	Bob Arnold
Donaldson, Dennis, AMC/LHACB	Richard Quarles	Helen Gonzalez	Bob Arnold
Emerson, Erica, AMC/LHXTB	Ike Hansen	Nancy Michelson	Bob Arnold
Evans, Erin, AMC/LHACB	Richard Quarles	Helen Gonzalez	Bob Arnold
Evans, Francis, AMC/LHX	Bob Arnold		Bob Arnold
Farnsworth, Fred, AMC/LHACB	Richard Quarles	Helen Gonzalez	Bob Arnold
Fites, George, AMC/LHXTA	Nancy Michelson	Francis Evans	Bob Arnold
Freeman, Francis, AMC/LH	Bob Arnold		Bob Arnold
Garfield, George, AMC/LH	Bob Arnold		Bob Arnold
Gonzalez, Helen, AMC/LHAC	Dan Curtiss	Bob Arnold	Bob Arnold
Grimes, Garth, AMC/LHACB	Richard Quarles	Helen Gonzalez	Bob Arnold
Hansen, Ike, AMC/LHXTB	Nancy Michelson	Francis Evans	Bob Arnold
Harris, Henry, AMC/LHADA	Tammy Stewart	John Iverson	Bob Arnold
Hoang, Andrew, AMC/LH	George Fites	John Iverson	Bob Arnold
Hoang, Danielle, AMC/LH	Chris Babbitt	Dan Curtiss	Bob Arnold
Hoang, Eric, AMC/LH	Eileen Daniels	Larry Koenig	Bob Arnold
Hummer, Hershel, AMC/LH	Peter Olson	Dan Curtiss	Bob Arnold
Irinski, Ivan, AMC/LHADA	Tammy Stewart	John Iverson	Bob Arnold
Iverson, John, AMC/LHAD	Dan Curtiss	Bob Arnold	Bob Arnold
Jerris, Jane, AMC/LHADA	Tammy Stewart	John Iverson	Bob Arnold
Kames, Keith, AMC/LHADB	Vincent Udell	John Iverson	Bob Arnold
Lawrence, Lance, AMC/LHADB	Vincent Udell	John Iverson	Bob Arnold
Martinez, Mary, AMC/LHADB	Vincent Udell	John Iverson	Bob Arnold
Michelson, Nancy, AMC/LHXT	Francis Evans	Bob Arnold	Bob Arnold
Mucker, Mark, AMC/LH	Peter Olson	Dan Curtiss	Bob Arnold
Nance, Nolan,			
O'Connor, Olive, AMC/LHADC	Zane Yates	John Iverson	Bob Arnold
Parsons, Patricia, AMC/LHADC	Zane Yates	John Iverson	Bob Arnold
Quarles, Richard, AMC/LHACB	Helen Gonzalez	Dan Curtiss	Bob Arnold
Reid, Richard, AMC/LHXTA			
Rhone, Ronald, AMC/LHADC	Zane Yates	John Iverson	Bob Arnold
Sorenson, Sarah, AMC/LHAC	Eileen Daniels	Helen Gonzalez	Bob Arnold
Stewart, Tammy, AMC/LHADA	John Iverson	Dan Curtiss	Bob Arnold
Tarman, Timothy, AMC/LHXSA	Chris Babbitt	Larry Koenig	Bob Arnold
Udell, Vincent, AMC/LHADB	John Iverson	Dan Curtiss	Bob Arnold
Ulanov, Uli, AMC/LHXSA	Chris Babbitt	Larry Koenig	Bob Arnold
Vinson, Violet, AMC/LHXSB	Eileen Daniels	Larry Koenig	Bob Arnold
Williams, Wilson, AMC/LHXSB	Eileen Daniels	Larry Koenig	Bob Arnold
Yates, Zane, AMC/LHADC	John Iverson	Dan Curtiss	Bob Arnold
Yeakley, Yolanda, AMC/LHXSB	Eileen Daniels	Larry Koenig	Bob Arnold
Zurbruggen, Zack, AMC/LHXTA	George Fites	Nancy Michelson	Bob Arnold

Number of Employees: 49

Figure 11-52: Supervisor Roster by Employee Report

11.3.6 Supervisor Roster by Supervisor Report

This report presents a list of a supervisor breakdown by supervisors, listing their employees.



Figure 11-53: Supervisor Roster by Supervisor Report Selection



Supervisor Roster

Paypool Manager	Sub-panel Supervisor	First Level Supervisor	Employee Name
Bob Arnold, AMC/LH	(none)	Bob Arnold	Curtiss, Dan , AMC/LHA Evans, Francis , AMC/LHX Freeman, Francis , AMC/LH Garfield, George , AMC/LH
	Bob Arnold	Dan Curtiss	Gonzalez, Helen , AMC/LHAC Iverson, John , AMC/LHAD
		Francis Evans	Michelson, Nancy , AMC/LHXT
	Dan Curtiss	Chris Babbitt	Hoang, Danielle , AMC/LH
		Helen Gonzalez	Quarles, Richard , AMC/LHACB
		John Iverson	Stewart, Tammy , AMC/LHADA Udell, Vincent , AMC/LHADB Yates, Zane , AMC/LHADC
		Peter Olson	Hummer, Hershel , AMC/LH Mucker, Mark , AMC/LH
	Francis Evans	Larry Koenig	Babbitt, Chris , AMC/LHXSA
		Nancy Michelson	Fites, George , AMC/LHXTA Hansen, Ike , AMC/LHXTB
	Helen Gonzalez	Eileen Daniels	Sorenson, Sarah , AMC/LHAC
		Peter Olson	Burns, Barry , AMC/LHACA Celon, Connie , AMC/LHACA
		Richard Quarles	Donaldson, Dennis , AMC/LHACB Evans, Erin , AMC/LHACB Farnsworth, Fred , AMC/LHACB Grimes, Garth , AMC/LHACB
	John Iverson	George Fites	Hoang, Andrew , AMC/LH
		Tammy Stewart	Harris, Henry , AMC/LHADA Irinski, Ivan , AMC/LHADA Jerris, Jane , AMC/LHADA
		Vincent Udell	Kames, Keith , AMC/LHADB Lawrence, Lance , AMC/LHADB Martinez, Mary , AMC/LHADB
		Zane Yates	O'Connor, Olive , AMC/LHADC Parsons, Patricia , AMC/LHADC Rhone, Ronald , AMC/LHADC
	Larry Koenig	Chris Babbitt	Tarman, Timothy , AMC/LHXSA Ulanov, Uli , AMC/LHXSA
		Eileen Daniels	Hoang, Eric , AMC/LH Vinson, Violet , AMC/LHXSB Williams, Wilson , AMC/LHXSB Yeakley, Yolanda , AMC/LHXSB
	Nancy Michelson	George Fites	Amdt, Aaron , AMC/LHXTA Butler, Bryoe , AMC/LHXTA Zurbruggen, Zack , AMC/LHXTA
		Ike Hansen	Cavazos, Carmen , AMC/LHXTB Dancy, Dyanne , AMC/LHXTB Emerson, Erica , AMC/LHXTB

Report run on: 18-SEP-2012 11:35:21 Page 2 of 2

Figure 11-54: Supervisor Roster by Supervisor Report

11.3.7 Zone A/CIP Report

Displays a Zone A/CIP diagram displaying if an employee's OCS is 6-8 points lower than their expected OCS.

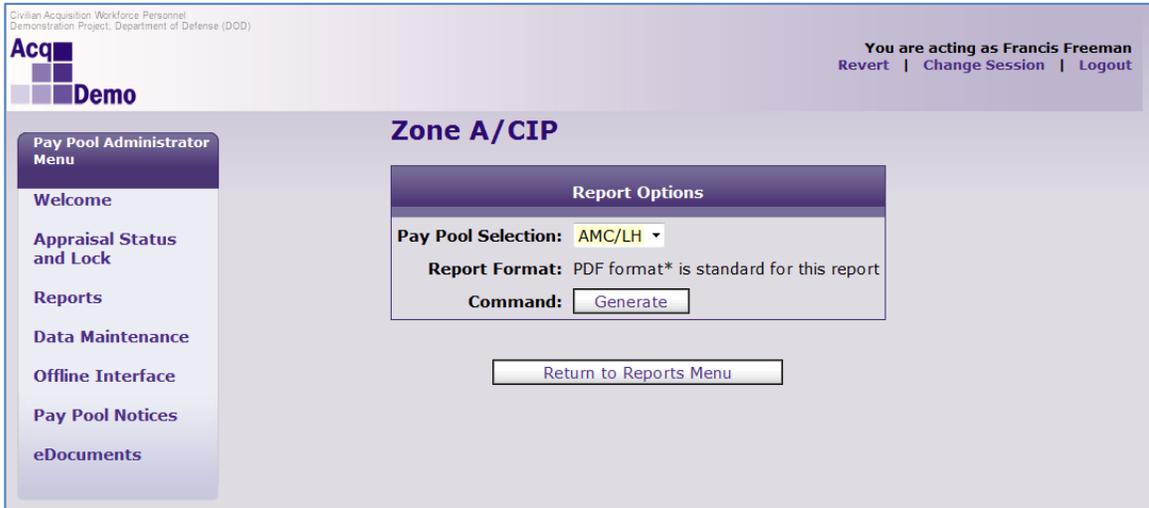


Figure 11-55: Zone A/CIP Report Selection

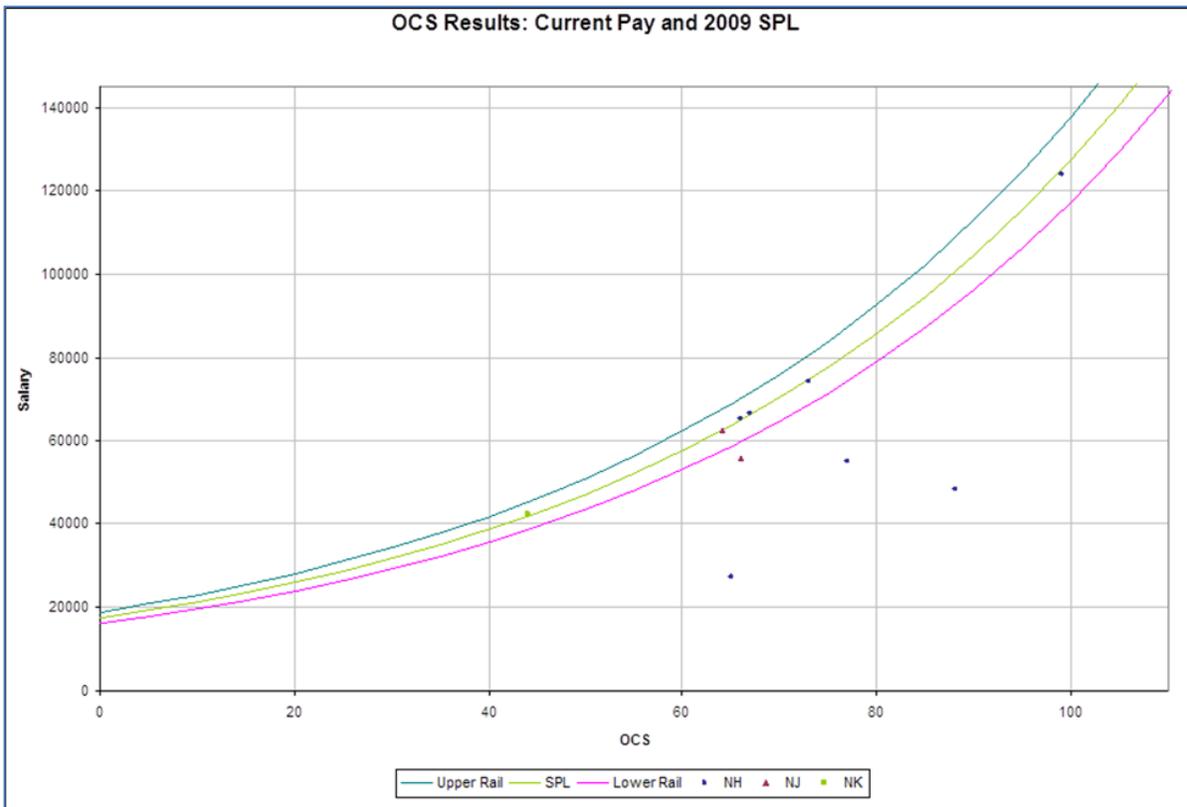


Figure 11-56: Zone A/CIP Report

12. CAS2NET DOCUMENT REPOSITORY (EDOCUMENTS)

The CAS2Net Document Repository is the database collection of digitally signed Annual Appraisal reports stored by employee by fiscal cycle.

When end of cycle processes are complete and Annual Appraisals have been approved, both the 1st Level Supervisor and the employee will review the content, digitally sign the Annual Appraisal and store the signed PDF file in CAS2Net Document Repository. Since higher level supervisors and managers may rate or review Annual Appraisals for subordinate employees, virtually any CAS2Net user group above 1st Level Supervisor may also need to sign Annual Appraisals in the CAS2Net Document Repository.

This user guide section overviews the CAS2Net Document Repository content and functionality for all CAS2Net users.

EDOCUMENT STATUS

Employee and 1st Level Supervisor signatures are required on the final Annual Appraisal document. Higher level supervisor and/or manager signatures are optional. Additionally, any CAS2Net user could assume a signatory role.

To provide access to the repository records, the CAS2Net navigation bar includes a link to “eDocuments” in each user menu.

Clicking **eDocuments** displays the “eDocument Status” web page. For employees, CAS2Net displays all status information with links by cycle year to drill down to repository record details. Supervisors and managers are shown lists of employees for the selected year with links by employee name to access repository record details.

“eDocument Status” content is the same for all users.

- **Year or Employee**—hot link to CAS2Net Document Repository “eDocument” detail page.
- **Employee Signature**—status values include:
 - Green ‘checkmark’ = employee signature certified complete
 - Red “X” = employee signature is not certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **Supervisor Signature**—status values include:
 - Green ‘checkmark’ = 1st Level Supervisor signature certified complete
 - Red “X” = 1st Level Supervisor signature is not certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **Manager Signature**—applies to any higher level supervisor or manager; values include:
 - Green ‘checkmark’ = at least one manager signature certified complete
 - Red “X” = none of the specified manager signatures is certified complete
 - (blank) = Not Provided (Annual Appraisal not approved or not uploaded)
- **eDocument Status**—overall CAS2Net Document Repository record status; values include:
 - Green ‘checkmark’ = ‘Annual Appraisal PDF file uploaded with required signatures complete
 - Red “X” = ‘Appraisal PDF not uploaded or required signatures incomplete.
 - (blank) = Not Provided (Annual Appraisal is not approved for signatures)

For supervisors and managers, the “eDocument Status” page always includes employees for whom the user is the current cycle 1st Level Supervisor—regardless of year. This page also includes employees for whom the user has an assigned supervisor relationship in the selected cycle year—or have been designated to sign the employee’s appraisal in the selected year.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

Acq Demo

You are acting as Adam A. Appleton
[Revert](#) | [Change Session](#) | [Logout](#)

Employee Menu

- Contribution Planning
- Mid-Point Review Self-Assessment
- Annual Appraisal Self-Assessment
- Closeout Self-Assessment
- Reports
- eDocuments
- Welcome

eDocument Status - Annual Appraisal(s) for Adam A. Appleton

Year	Employee Signature	Supervisor Signature	Manager Signature (Optional)	eDocument Status
2015				
2014				

Key:
 Complete.
 Incomplete.
 Not Provided.

Figure 12-1: Employee eDocument Status

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

Acq Demo

You are acting as Margaret Manager
[Revert](#) | [Change Session](#) | [Logout](#)

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Closeout Assessment
- Welcome
- Reports
- eDocuments

eDocument Status - Annual Appraisal(s) for Year: 2014 -

Employee	Employee Signature	Supervisor Signature	Manager Signature (Optional)	eDocument Status
Joe Contributor				
Blank Employee				
Francis Evans				
Nolan Nance				
Richard Reid				
Rose Sayers				

Key:
 Complete.
 Incomplete.
 Not Provided.

Figure 12-2: 1st Level Supervisor eDocument Status

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DDC)

Acq Demo

You are acting as Francis Freeman
[Revert](#) | [Change Session](#) | [Logout](#)

Pay Pool Administrator Menu

- Welcome
- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Pay Pool Notices
- eDocuments

eDocument Status - Annual Appraisal(s) for Year: 2014 -

Employee	Employee Signature	Supervisor Signature	Manager Signature (Optional)	eDocument Status
Adam A. Appleton				
Dyanne Dancy				
Erica Emerson				

Key:
 Complete.
 Incomplete.
 Not Provided.

Figure 12-3: Higher Level Supervisor or Manager eDocument Status

For supervisors and managers, the “eDocument Status” page title includes a cycle “Year” dropdown to refresh the web page with information for a different appraisal cycle.

The **Year** or **Employee** name link opens the CAS2Net Document Repository “eDocument” detail page.

The employee, supervisor and manager signature status columns indicate who has signed or not signed the annual appraisal.

Blanks in the “eDocument Status” column indicate that the Annual Appraisal has been NOT been approved is not available for signatures.

EDOCUMENT WEB FORM

The “eDocument” web page provides a signer’s perspective of the CAS2Net Document Repository for a given employee Annual Appraisal record.

CAS2Net builds the “eDocument” page dynamically to show only relevant information. Fields that are not relevant to the current user for reviewing or signing the repository record are omitted.

“eDocument” web form content includes:

File Name & Date Section—provides input controls for accessing the Annual Appraisal PDF file.

- File status message—explains why an active PDF file is not present (displayed as needed)
- **[Generate Adobe PDF File]**—link to Oracle Reports to create the initial unsigned “Appraisal Parts I,II, and III” report (displayed when Annual Appraisal is approved but active PDF file is not present).
- **File Name**—link to view or download the active PDF file (displayed when file is present)
- **Date Posted**—file upload date and time (displayed when file is present)
- **File to Upload**—Windows browse control to locate the signed PDF file on the local hard drive (displayed when file may be uploaded)
- **Upload File** button—uploads signed Annual Appraisal PDF file from designated hard drive location (displayed when file may be uploaded)

Signatures Section—provides input fields to track signature details by CAS2Net user role.

- Employee – (displayed when complete or user is the employee)
 - **Signature Certified Complete**—checkbox indicator that employee signature is complete
 - **Name**—modifiable text box pre-filled with employee’s name
 - **Date Signed**—date that employee signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—employee digitally signed using Adobe Pro software
 - **Handwritten**—employee signed hard copy printout and uploaded scanned file
 - **Declined to Sign**—employee intentionally chose not to sign the Annual Appraisal
- First Level Supervisor – (displayed when complete or user is 1st Level Supervisor)
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with 1st Level Supervisor’s name
 - **Date Signed**—date that 1st Level Supervisor signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—1st Level Supervisor digitally signed using Adobe Pro software
 - **Handwritten**—1st Level Supervisor manually signed and uploaded scanned file
- Supervisor 2 – (displayed when complete or user is designated signer)

- **Signature Certified Complete**—checkbox indicator that signature is complete
- **Name**—modifiable text box pre-filled with 2nd Level Supervisor’s name
- **Date Signed**—date that 2nd Level Supervisor signed the Annual Appraisal
- **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—2nd Level Supervisor digitally signed using Adobe Pro software
 - **Handwritten**—2nd Level Supervisor manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- Sub Panel Meeting – (displayed when complete or user is designated signer)
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the manager signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—manager digitally signed using Adobe Pro software
 - **Handwritten**—manager manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- Pay Pool Manager – (displayed when complete or user is designated signer)
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the Pay Pool Manager signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—Pay Pool Manager digitally signed using Adobe Pro software
 - **Handwritten**—Pay Pool Manager manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- CSF – (displayed when complete or user is designated signer)
 - **Signature Certified Complete**—checkbox indicator that signature is complete
 - **Name**—modifiable text box pre-filled with signer’s name
 - **Date Signed**—date that the CSF signed the Annual Appraisal
 - **Signature Method**—radio button identifies how signature was applied to the appraisal:
 - **Digital**—CSF digitally signed using Adobe Pro software
 - **Handwritten**—CSF manually signed and uploaded scanned file
 - **Not Required**—signature is not required for this employee appraisal
- **Save** button—updates the CAS2Net Document Repository signatures

Notes—message text identifying the effective 1st Level Supervisor for this appraisal

Maintenance View button—when the user is the effective 1st Level Supervisor, CAS2Net displays a button to toggle between the “Signing View” and the “Maintenance View”. The maintenance view displays all eDocument fields with capabilities to repair or redo simple file upload errors or signature details. Reference the “eDocument Maintenance” sub-section in the Pay Pool Administrator “Data Maintenance” section for guidance on the content and use of these features.

Exit button—returns to “eDocument Status” page.

UPDATING THE CAS2NET DOCUMENT REPOSITORY

If the Annual Appraisal has not been approved for signing, CAS2Net displays the file status message “The [cycle year] Annual Appraisal for [employee name] is not available.” All other fields are omitted.

Users are unable to digitally sign the Annual Appraisal until the document has been formally approved.



Figure 12-4: eDocument Annual Appraisal Not Available

When the Annual Appraisal has been approved, the document is ready for signatures. The employee and users with a signature relationship to the employee for the given year may access the eDocument record to attach signatures.

There are four basic steps involved in digitally signing the Annual Appraisal:

- 1) Retrieve the active Annual Appraisal report PDF file;
- 2) Digitally sign the appraisal using Adobe Pro software;
- 3) Upload the signed PDF file to the CAS2Net Document Repository;
- 4) Update signature details and certify information is complete.

Step (1) Retrieve the active Annual Appraisal report PDF file

For the first person to sign, CAS2Net provides a report link to generate an unsigned report PDF file.

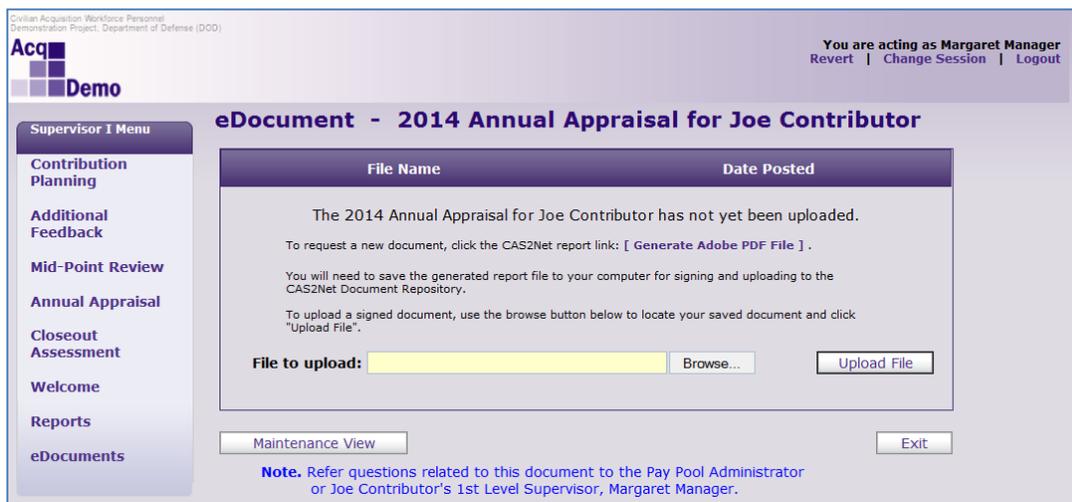


Figure 12-5: eDocument Generate PDF File

To digitally sign the appraisal as the first signer:

- Click the **[Generate Adobe PDF File]**.
When you click **[Generate Adobe PDF File]**, CAS2Net creates report “Appraisal Parts I,II, and III” displays it in a new window. Use the Adobe software’s file save feature to store the document on your local drive.

CCAS SALARY APPRAISAL DOCUMENT FOR 2014

Part I: CCAS Salary Appraisal Form

Name: Joe Contributor	Series: 0801	Appraisal Period:
CAS2Net ID: 2711	Broadband Level: III	From: 01-OCT-13
Organization: AMC/LHXTB	Retained Pay: No	To: 30-SEP-14
Career Path: NH	Presumptive: None	

Approved By: Bob Arnold, Pay Pool Manager **Effective Date of Appraisal:** January 1, 2015

Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.

Date

Supervisor Print / Sign Date

Employee Print / Sign Date

Figure 12-6: eDocument Save PDF File

To digitally countersign a previously signed appraisal:

When the Annual Appraisal has been previously signed and uploaded by another user, you’ll need to add your signature to same document. CAS2Net displays the “eDocument” web page with input controls to support attaching another signature to the current active PDF file.

The “File Name” section provides a file name link to retrieve the saved Annual Appraisal for your signature along with input fields to later upload the signed PDF file.

The “Signatures” section shows saved signature information fields. Editable input fields are displayed for the current user to enter signature information. Previously completed signature details are displayed “read-only”.

Acq Demo You are acting as Chris Babbitt Revert | Change Session | Logout

eDocument - 2014 Annual Appraisal for Amy Artis

File Name	Date Posted
Supervisor Test for Amy Part I.pdf	04-MAY-2015 12:41:13 PM

Click the file name link to open the document. To save to your computer, right click the file name and choose "Save Target As..."

To upload a signed document, use the browse button below to locate your saved document and click "Upload File".

File to upload: _____ Browse... Upload File

Signatures

Employee	Name	Date Signed	Signature Method
<input type="checkbox"/> Signature Certified Complete	Amy Artis	05/04/2015	@ Digital
<input type="checkbox"/> Signature Certified Complete	Chris Babbitt	05/04/2015 Calendar	@ Digital Handwritten

Save

Maintenance View Exit

Note. Refer questions related to this document to the Pay Pool Administrator or Amy Artis's 1st Level Supervisor, Chris Babbitt.

Figure 12-7: eDocument Download Saved PDF File

- Right click the **File Name** and select option “Save Target As ...” to download the previously signed copy of the CAS2Net report “Appraisal Parts I,II, and III” and save it to your local hard drive.

Step (2) Digitally sign the appraisal using Adobe Pro software

Use Adobe Pro to digitally sign the appraisal.

Reference the appendix in the back of this user guide for guidance on using Adobe Pro products to digitally sign the Annual Appraisal.

- Appendix A – Digital Signatures Using Adobe X Pro.

Be sure to save the signed PDF file to your local hard drive!

Step (3) Upload the signed PDF file to the CAS2Net Document Repository

After signing and saving the appraisal to your local hard drive, return to the eDocument update page.

- Use the “Browse” button to locate the saved PDF file.
- Click the “Upload File” button to add this file to the CAS2Net Document Repository.



Figure 12-8: eDocument File Upload

When **Upload File** is clicked, CAS2Net adds the appraisal to the database, displays the message “File upload successful”, and presents the **Signatures** section for you to update your signature information.



Figure 12-9: eDocument File Upload Successful

Click the **File Name** link to inspect the document to make sure the content is legible and that all expected digital signatures are present. If errors occur, repeat the upload steps as necessary.

Step (4) Update signature details and certify information is complete

Finally, use the input fields provided in the Signatures section to inform CAS2Net that your signature is contained in the uploaded PDF file.

- You may change the pre-filled “Name” field, if necessary, to match your signature.
- Use the “Calendar” button to select the “Date Signed” from the calendar pop-up window.
- Choose the applicable “Signature Method” radio button –
 - “Digital” indicates you signed using Adobe Pro digital signing functionality.
 - “Handwritten” indicates you manually signed a hard copy printout of the appraisal, scanned the paper document to a file on your local drive that you then uploaded to CAS2Net. Support for handwritten signatures is provided for employees with no access digital signature software.
 - “Declined to Sign” (employee only) indicates you intentionally chose not to sign the Annual Appraisal and did not upload a PDF file containing your signature.
 - “Not Required” (higher level supervisors and managers only) indicates your signature is not required for this appraisal.
- Check the “Signature Certified Complete” checkbox to certify that the uploaded PDF file contains the signature information described.
- Click “Save” to update the CAS2Net Document Repository database record.

CAS2Net displays the message “Signatures successfully updated” to indicate the database has been updated, and redisplay the 1st Level Supervisor signature fields in read-only mode.

The screenshot shows the CAS2NET interface for updating signature details. The page title is "eDocument - 2014 Annual Appraisal for Joe Contributor". A message box at the top indicates "Signatures successfully updated." Below this, a table lists the uploaded document:

File Name	Date Posted
2014 Annual Appraisal for Joe Contributor.pdf	19-MAY-2015 05:19:24 PM

Below the table, the "Signatures" section is visible. It includes a checkbox for "Signature Certified Complete" which is checked. The signature details are as follows:

First Level Supervisor	Name: Margaret Manager	Date Signed: 04/30/2015
	Signature Method: Digital	

At the bottom of the interface, there is a "Maintenance View" button and an "Exit" button. A note at the bottom states: "Note. Refer questions related to this document to the Pay Pool Administrator or Joe Contributor's 1st Level Supervisor, Margaret Manager."

Figure 12-10: eDocument Signature Updated

That's it. The signing process is complete when the Annual Appraisal PDF file has been uploaded and signature details are certified complete.

CAS2Net displays a “Note” at the bottom of the “eDocument” web page identifying the effective 1st Level Supervisor for the corresponding appraisal cycle. The 1st Level Supervisor and the Pay Pool Administrator have access to “eDocument Maintenance” features to correct some user errors or to start over.

For the effective 1st Level Supervisor, CAS2Net displays the **Maintenance View** button to toggle between the “Signing View” and the “Maintenance View”. The maintenance view content and features are detailed in the “eDocument Maintenance” sub-section of the Pay Pool Administrator “Data Maintenance” section.

The “Exit” button returns to the “eDocument Status” page which reflects the updated information.

Civilian Acquisition Workforce Personnel Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Adam A. Appleton
[Revert](#) | [Change Session](#) | [Logout](#)

eDocument Status - Annual Appraisal(s) for Adam A. Appleton

Year	Employee Signature	Supervisor Signature	Manager Signature (Optional)	eDocument Status
2015				
2014				

Key:
 Complete.
 Incomplete.
 Not Provided.

Figure 12-11: eDocument Status Updated

The “[Employee/Supervisor/Manager] Signature” column contains a green checkmark indicating the user’s signature has been certified complete.

The overall “eDocument Status” column contains a green checkmark when both the employee’s and the 1st Level Supervisor’s signatures are certified complete. Otherwise this column contains a red “X” to indicate the CAS2Net Document Repository record is incomplete.

APPENDIX A - DIGITAL SIGNATURES USING ADOBE X PRO

The following steps explain how to use Adobe X Pro to digitally sign a PDF document file.

STEP A1: OPEN PDF FILE WITH ADOBE PRO

- Use Windows File Explorer to locate the PDF file.
- Right click on file name and select *Edit with Adobe Acrobat*

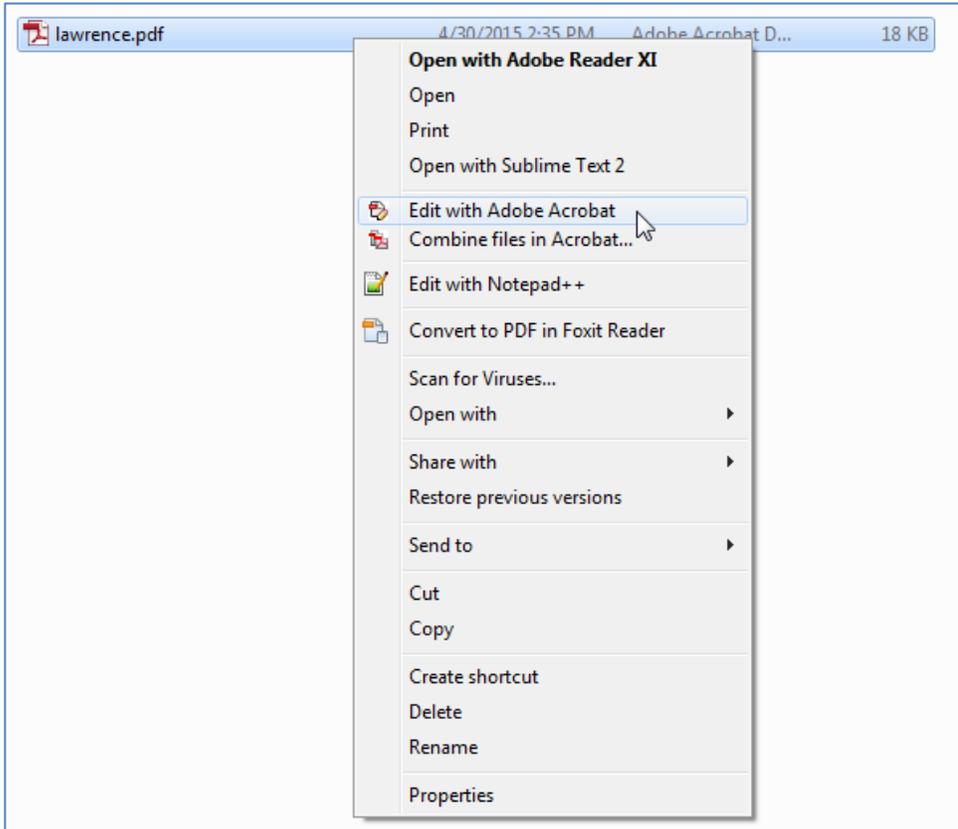


Figure A- 1: Open PDF File with Adobe Pro

STEP A2: SELECT ADOBE PRO SIGN WITH CERTIFICATE

- Click the *Sign* button
- Click *Sign with Certificate* under the *Work with Certificates* tab

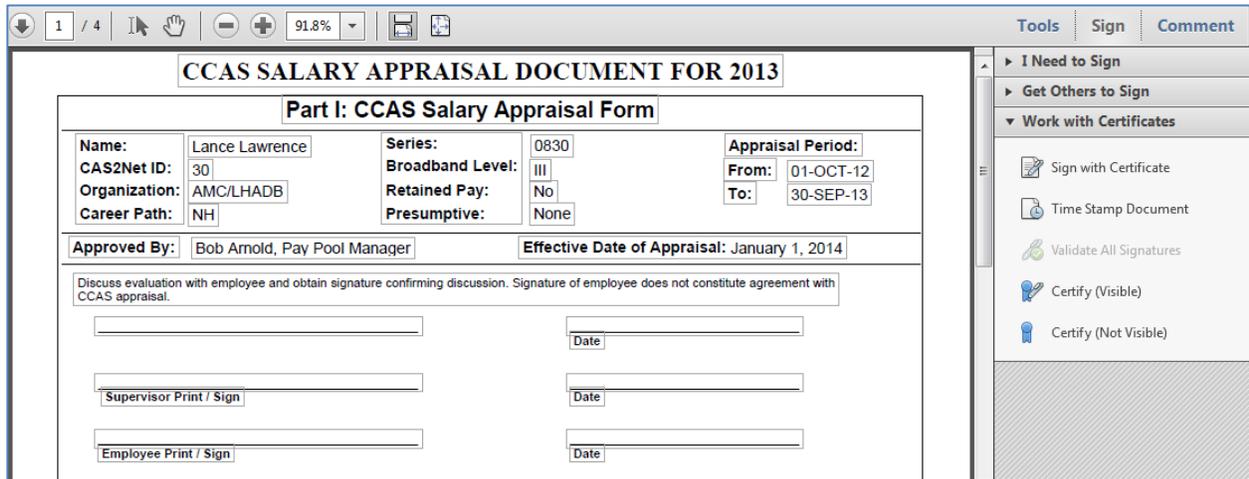


Figure A- 2: Select Adobe Pro “Sign With Certificate”

STEP A3: CLICK DRAG NEW SIGNATURE RECTANGLE

The message box below appears.

- Click the *Drag New Signature Rectangle ...* button

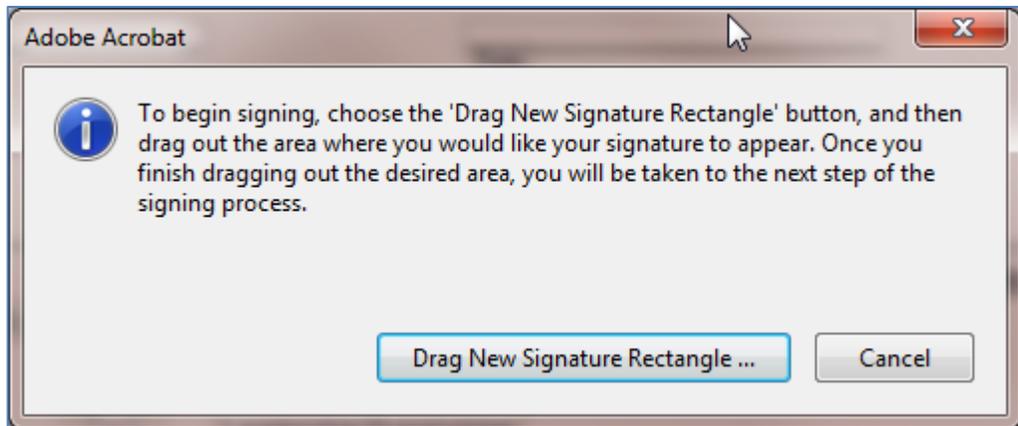


Figure A- 3: Click Drag New Signature Rectangle

STEP A4: SELECT “SIGN AS” CERTIFICATE

- Choose the certificate from the *Sign As:* dropdown box.
- Click the *Sign* button.

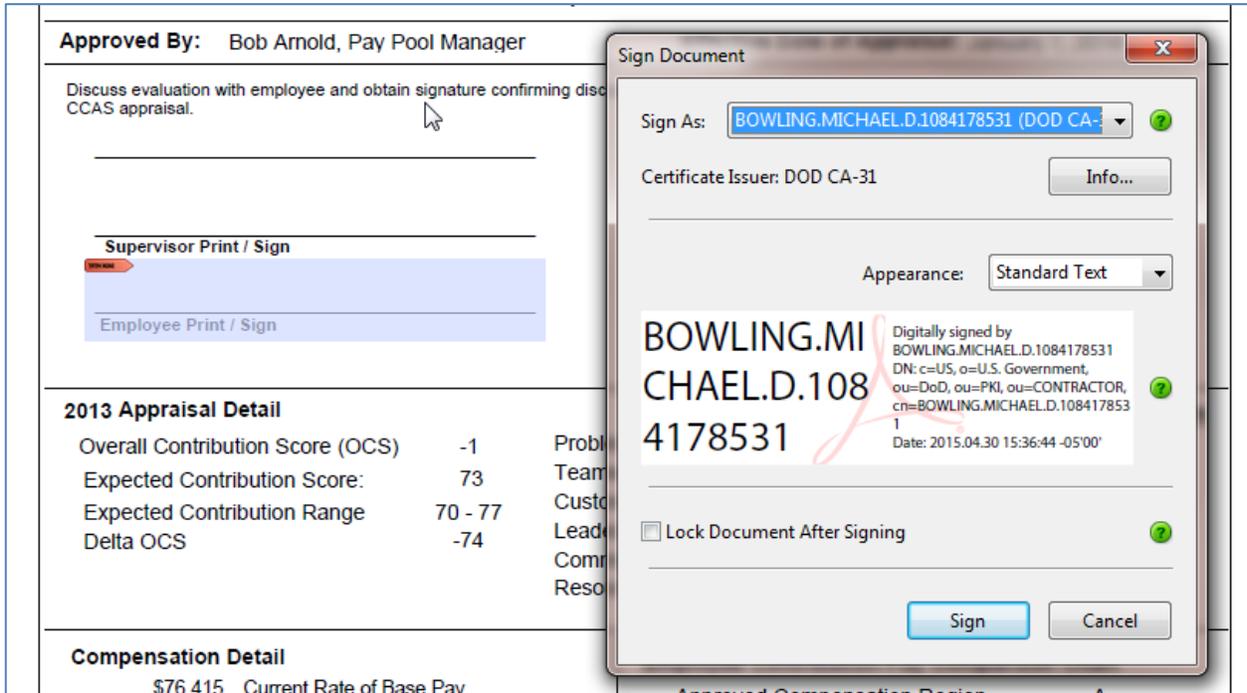


Figure A- 4: Select “Sign As” Certificate

STEP A5: SAVE DIGITALLY SIGNED DOCUMENT

- At the prompt to save, either leave the file name as is or choose a new one.

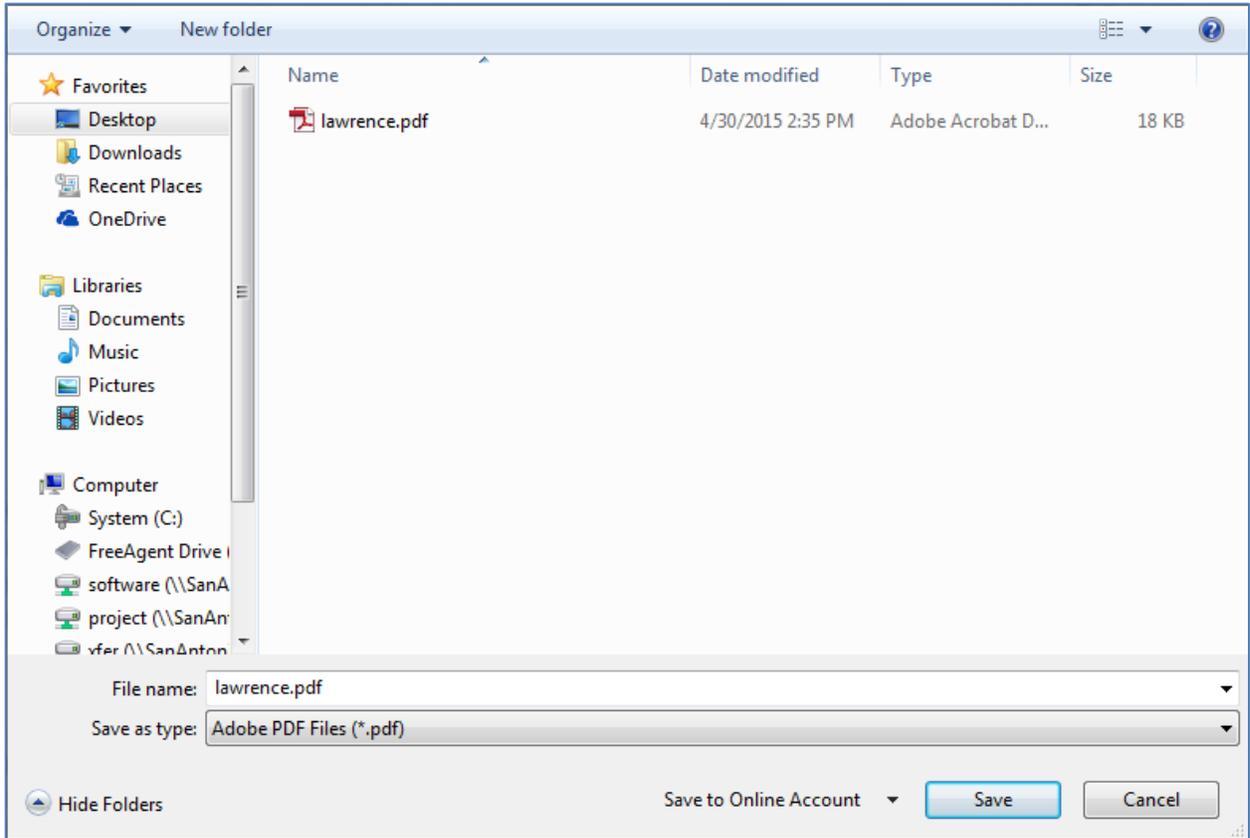


Figure A- 5: Save Digitally Signed Document

STEP A6: ENTER CAC PIN

- If prompted, enter your CAC PIN.

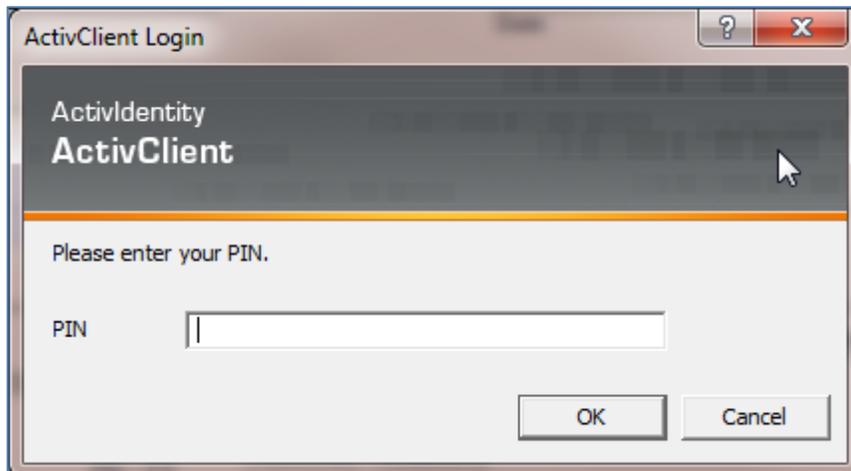


Figure A- 6: Enter CAC PIN

A7: ADOBE PRO MESSAGES

The message box below may appear after opening a PDF file that has already been signed.

- Click either radio button and then click the *OK* button

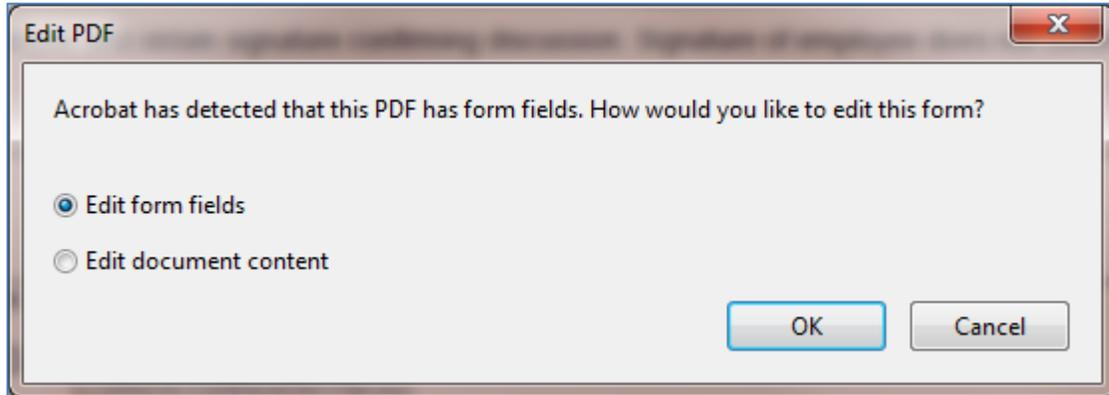


Figure A- 7: Adobe Pro Messages (1 of 2)

The radio button chosen determines the next message that will appear. These messages are shown below.

- Click OK on either of them and continue adding a signature without further errors.

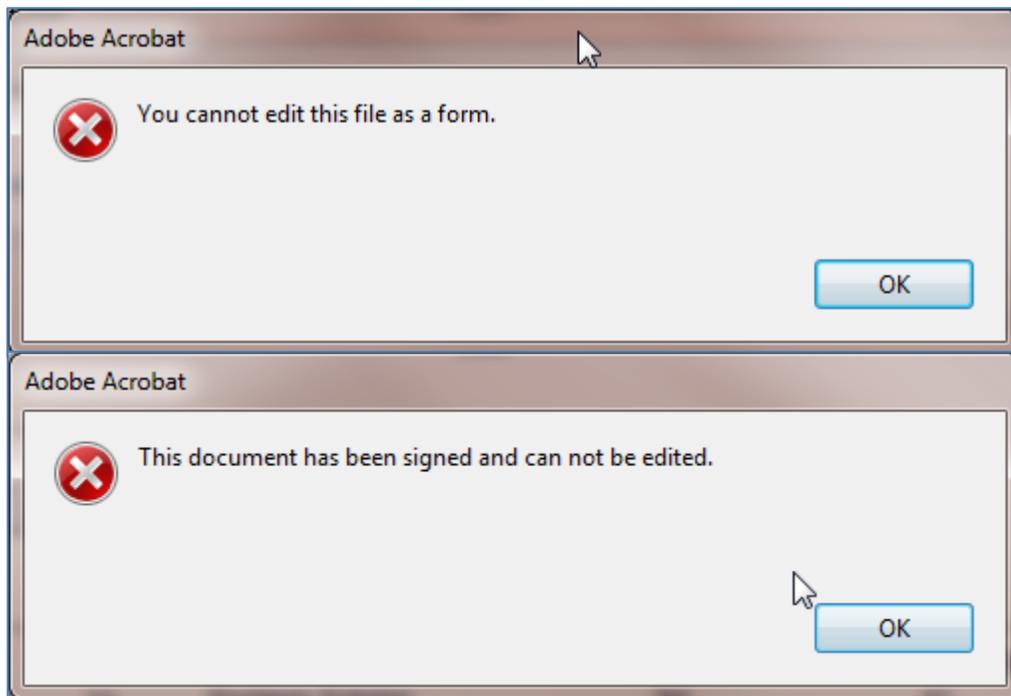


Figure A- 8: Adobe Pro Messages (2 of 2)