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Contribution-based Compensation and Appraisal System Software
(CAS2Net)



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Document Change History

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

| Date | Version # | Change Description |
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| 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”. |
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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. 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.

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. |
| 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). |

| Section/ Sub- Section | Name | Contents |
|--------------------------------------|-----------------------------|--|
| 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. |
| 9.0 | 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. |
| 10.0 | Reports | This section overviews the reports available to CAS2Net users. |

2. CAS2NET OVERVIEW

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

2.1 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 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.

2.2 Who Should Use This Guide?

The CAS2NET User Guide is for 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. |

2.3 Access and Authorization

The 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.

2.4 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.

2.5 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 is the name of another web page – links are always underlined.
- 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.

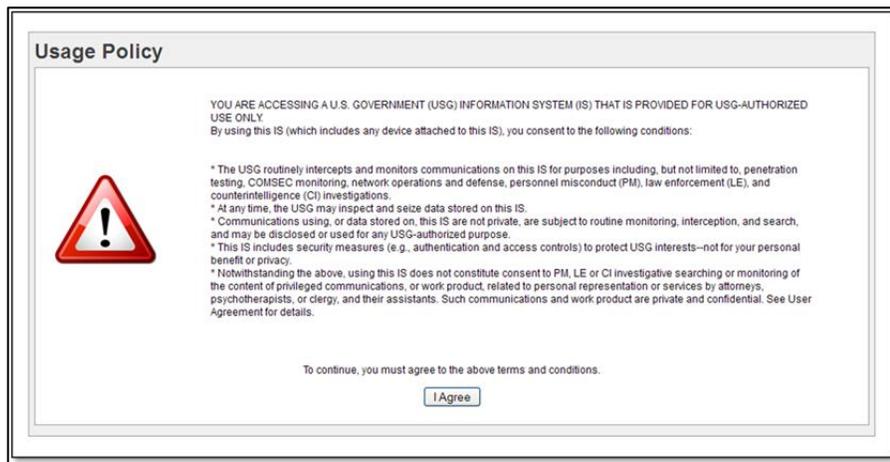


Figure 3-1: Usage Policy Screen

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

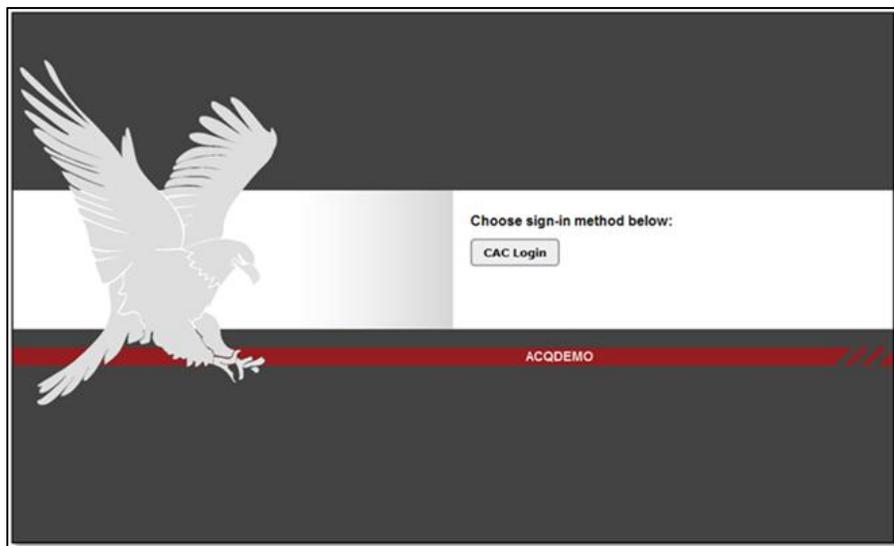


Figure 3-2: CAC Logo Screen

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

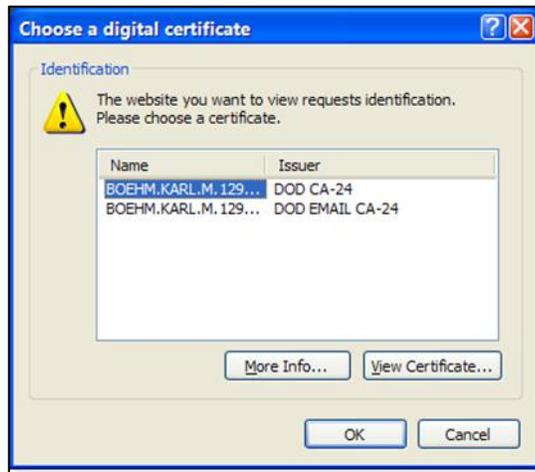


Figure 3-3: Digital Certification Selection Screen

If prompted, enter your CAC PIN.

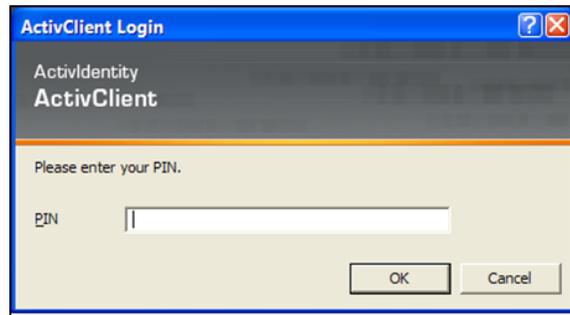


Figure 3-4: CAC Pin Entry Screen

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

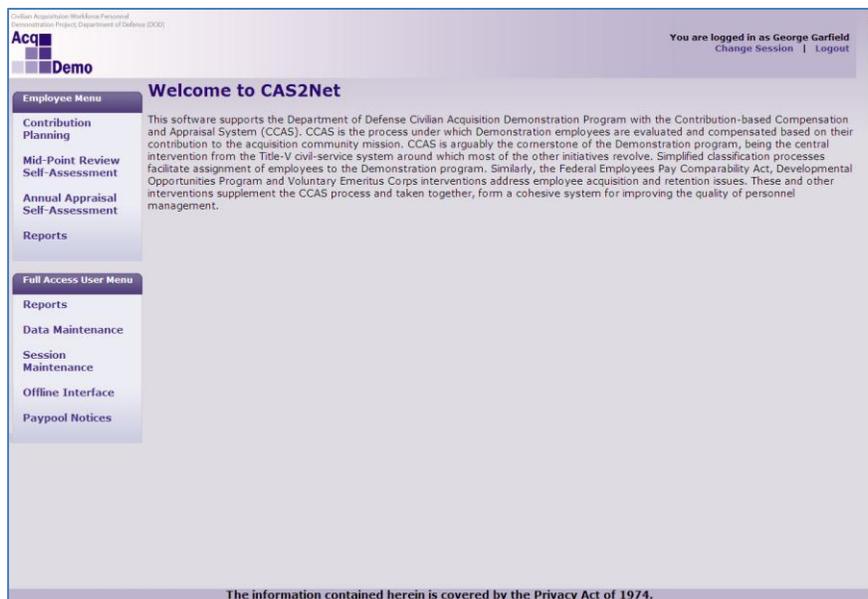


Figure 3-5: CAS2Net Welcome Screen

- 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**, and **Reports**.



Figure 3-6: Employee Log In

- 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**, and **Reports**.

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.

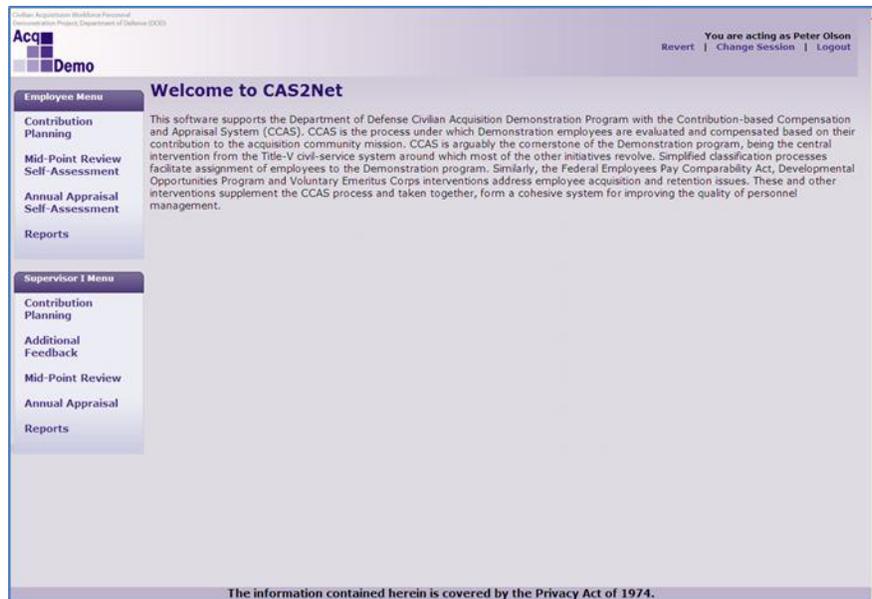


Figure 3-7: Level 1 Supervisor Log In

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

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**, and **Annual Appraisal**.

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.

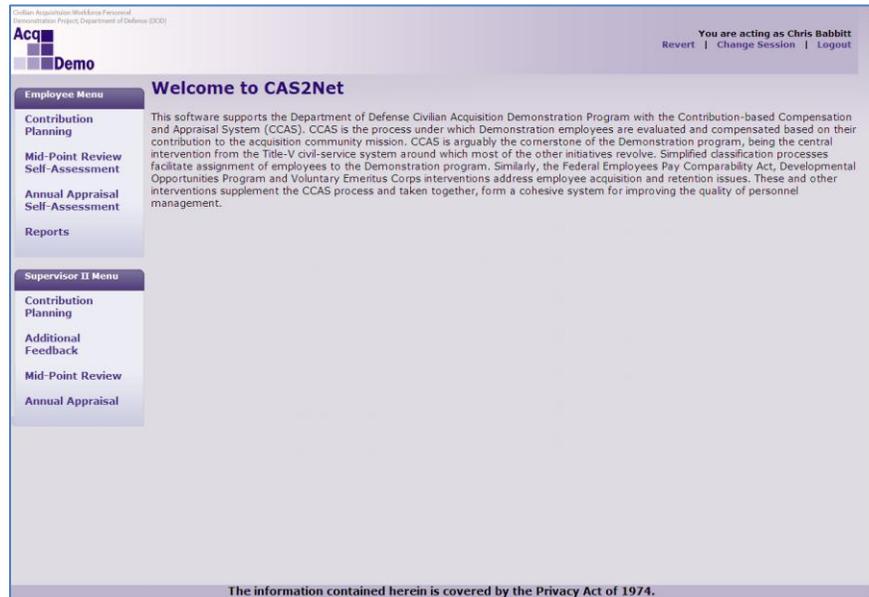


Figure 3-8: Level 2 Supervisor Log In

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

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**, and **Annual Appraisal**.

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.

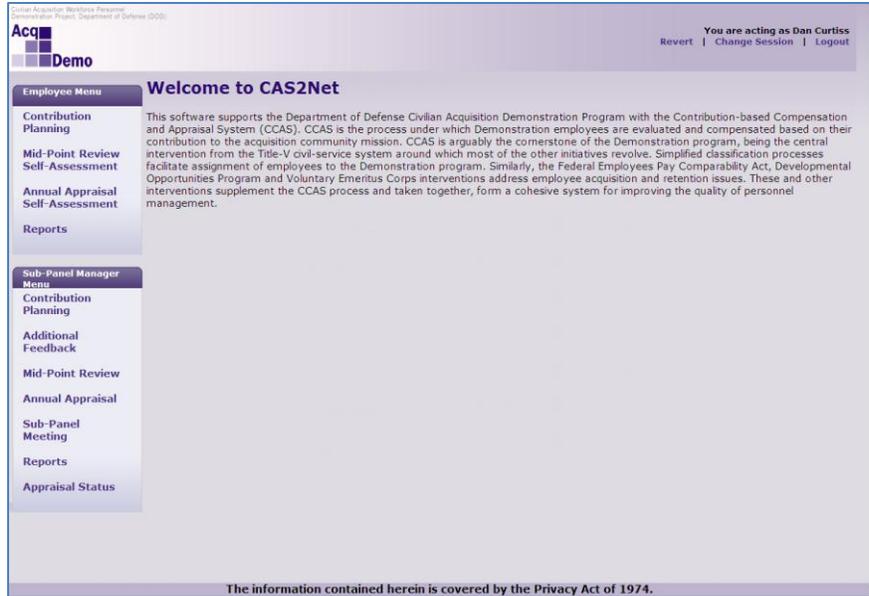


Figure 3-9: Sub-Panel Manager Log In

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

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**, and **Annual Appraisal**.

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.

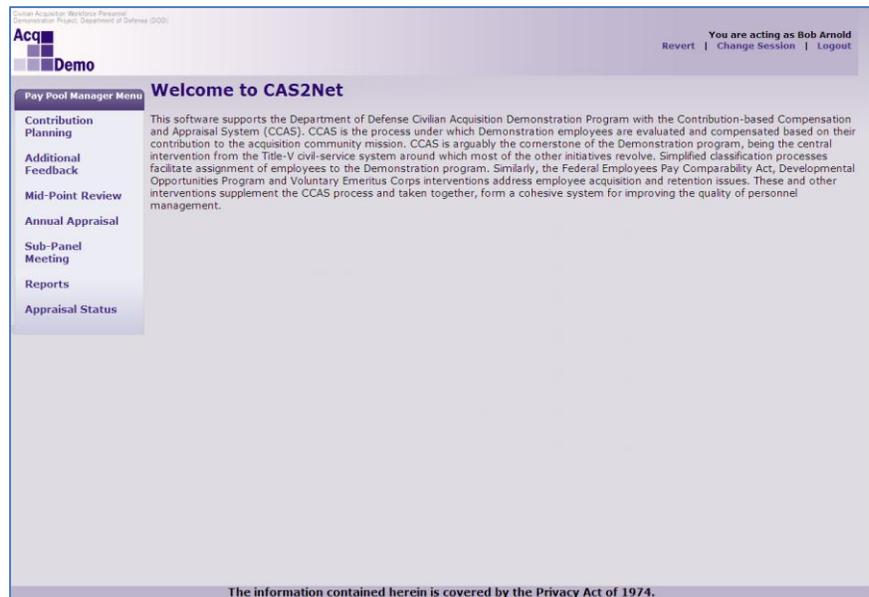


Figure 3-10: Pay Pool Manager Log In

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

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**, and **Annual Appraisal**.

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.

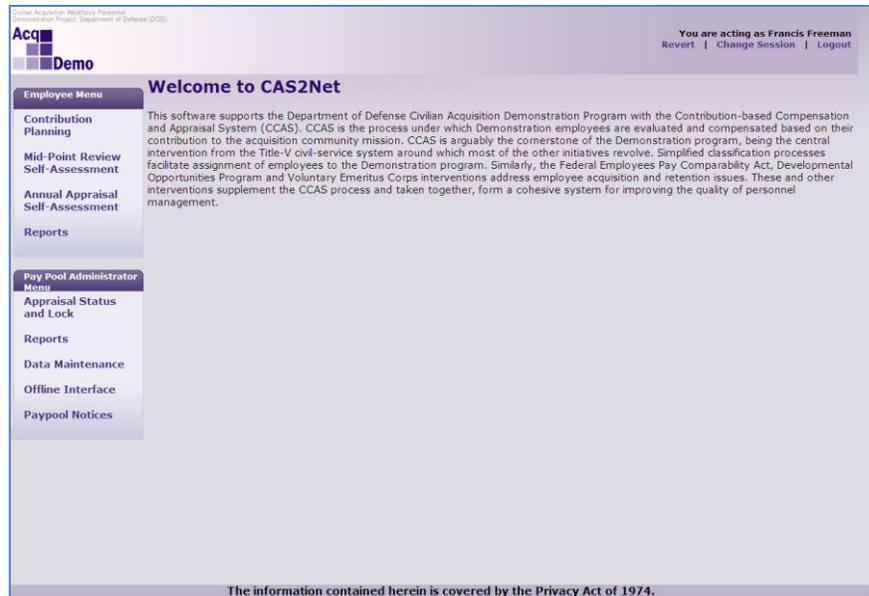


Figure 3-11: Pay Pool Administrator Log In

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

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**, and **Annual Appraisal**.

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.

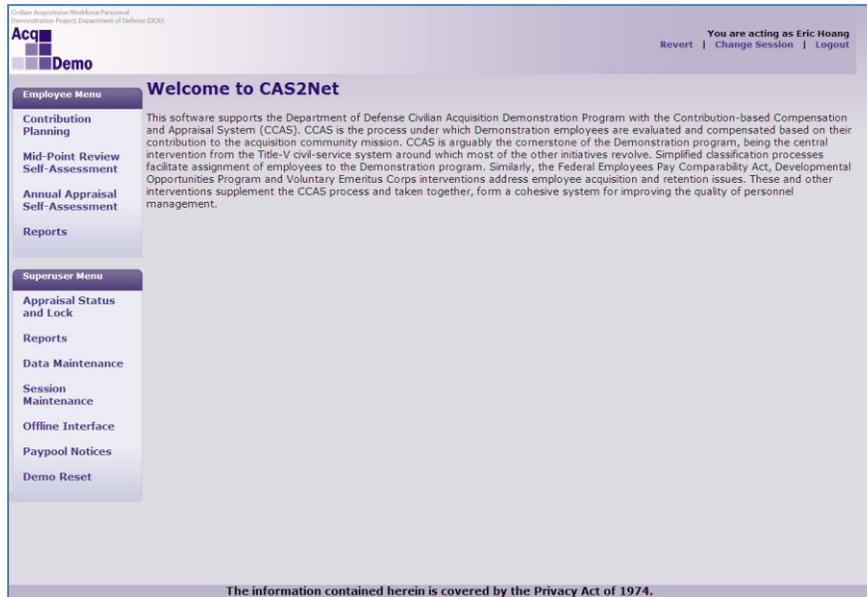


Figure 3-12: Superuser Log In

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 2 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.

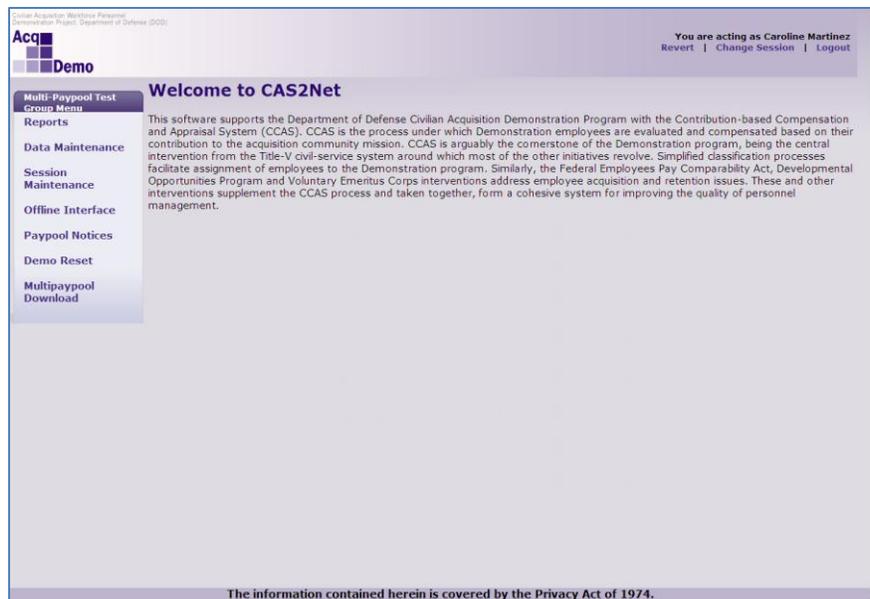


Figure 3-14: “Multi-Pay Pool User” Log In

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.

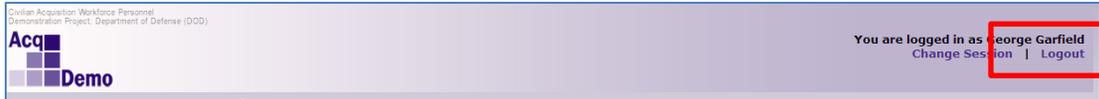


Figure 3-15: User Logout Link

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

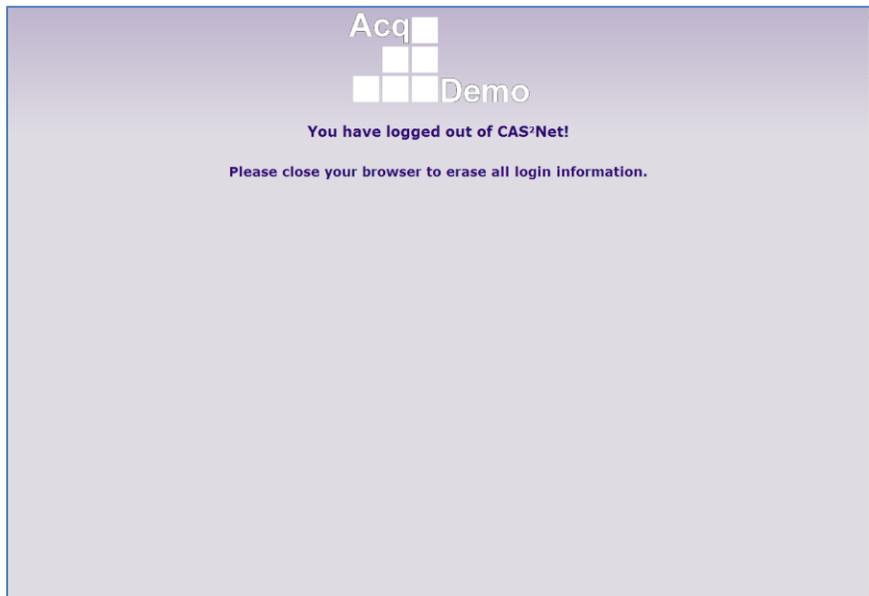


Figure 3-16: Log Out Message

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

3.3 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 and Annual Appraisal Self Assessments, Mid-Point Review, Additional Feedback 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 the “Timeout Warning” feature is active.

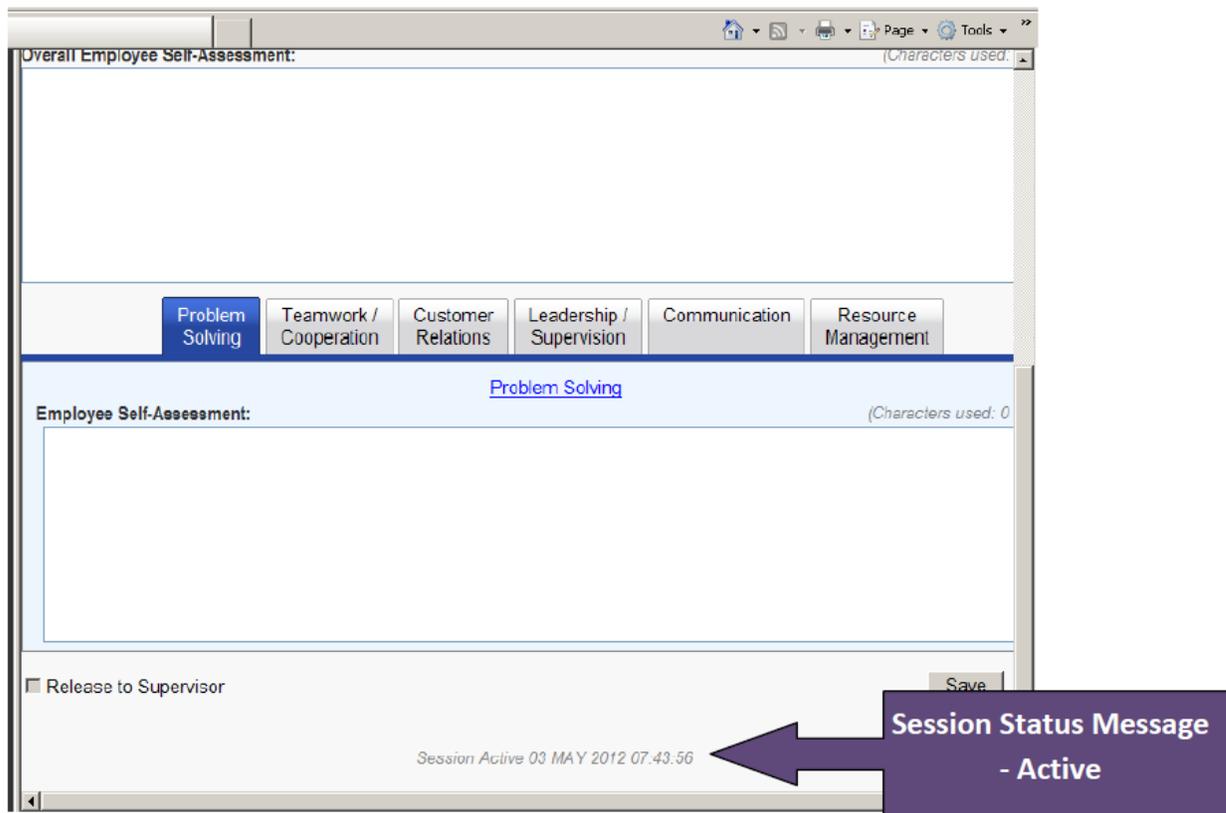


Figure 3-17: Session Status Message - Active

- 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.

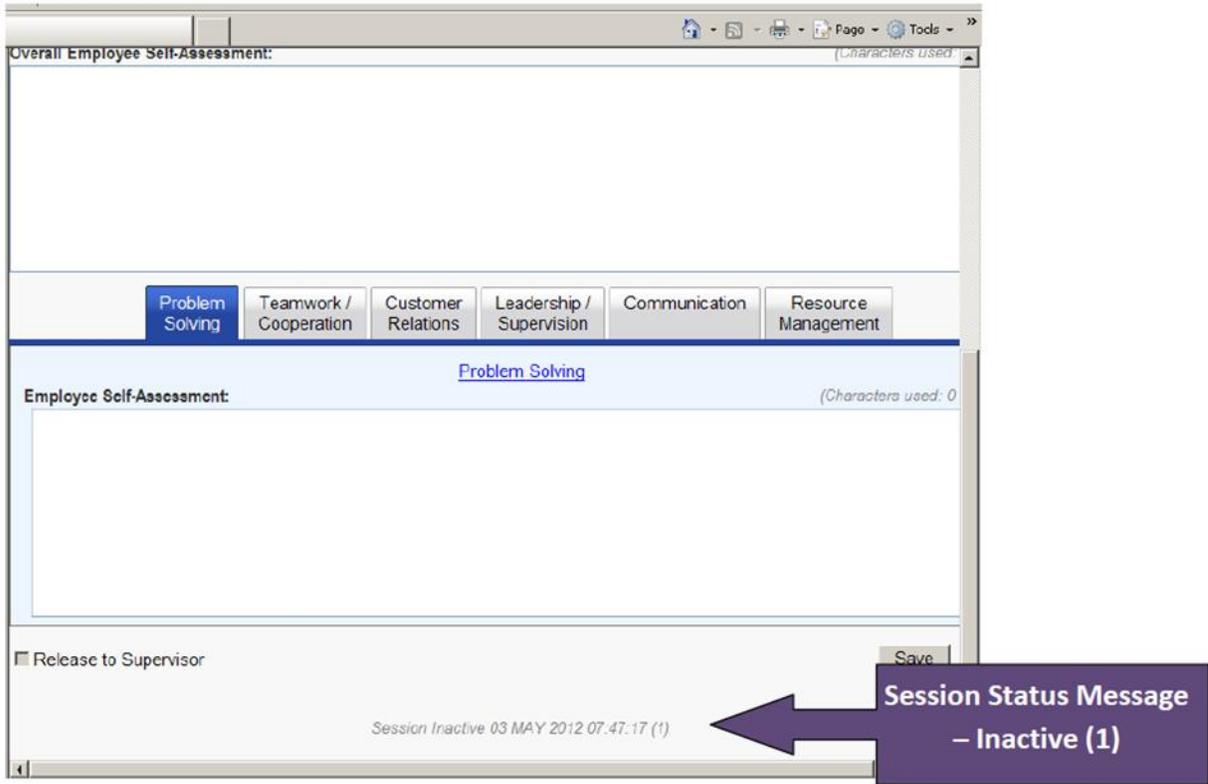


Figure 3-18: Session Status Message – Inactive (1)

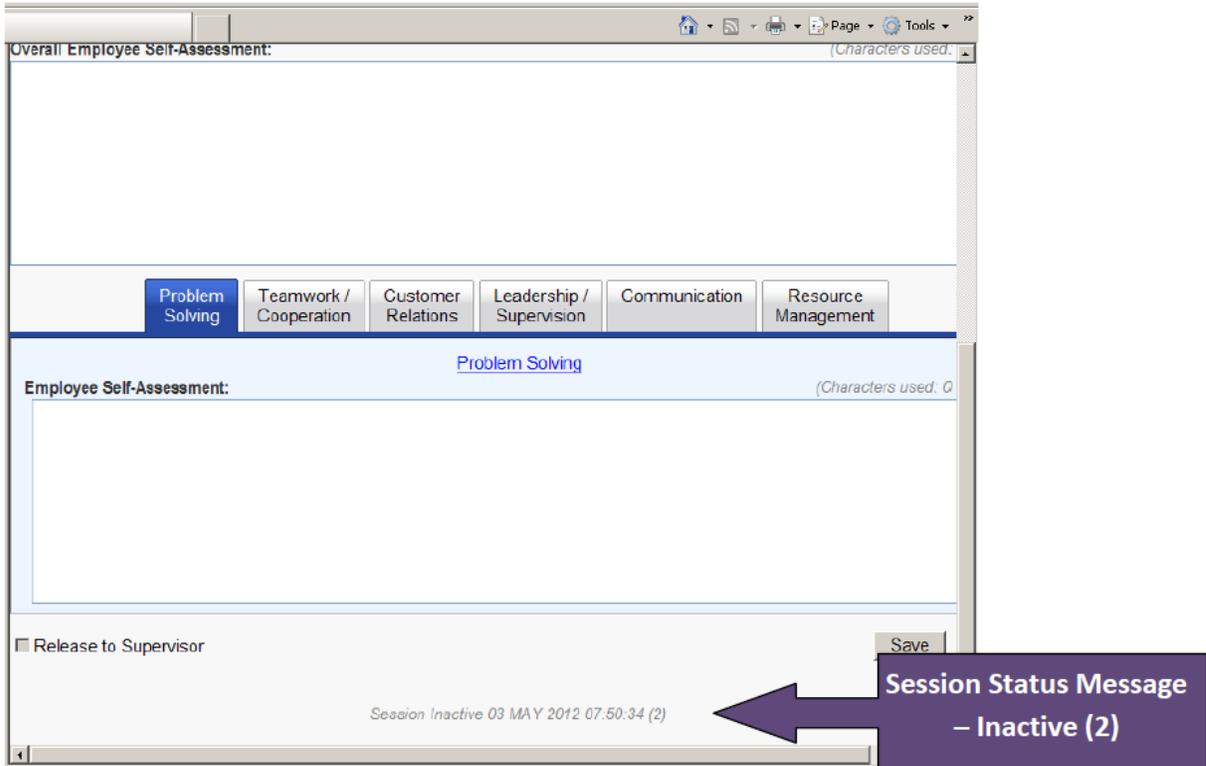


Figure 3-19: Session Status Message – Inactive (2)

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

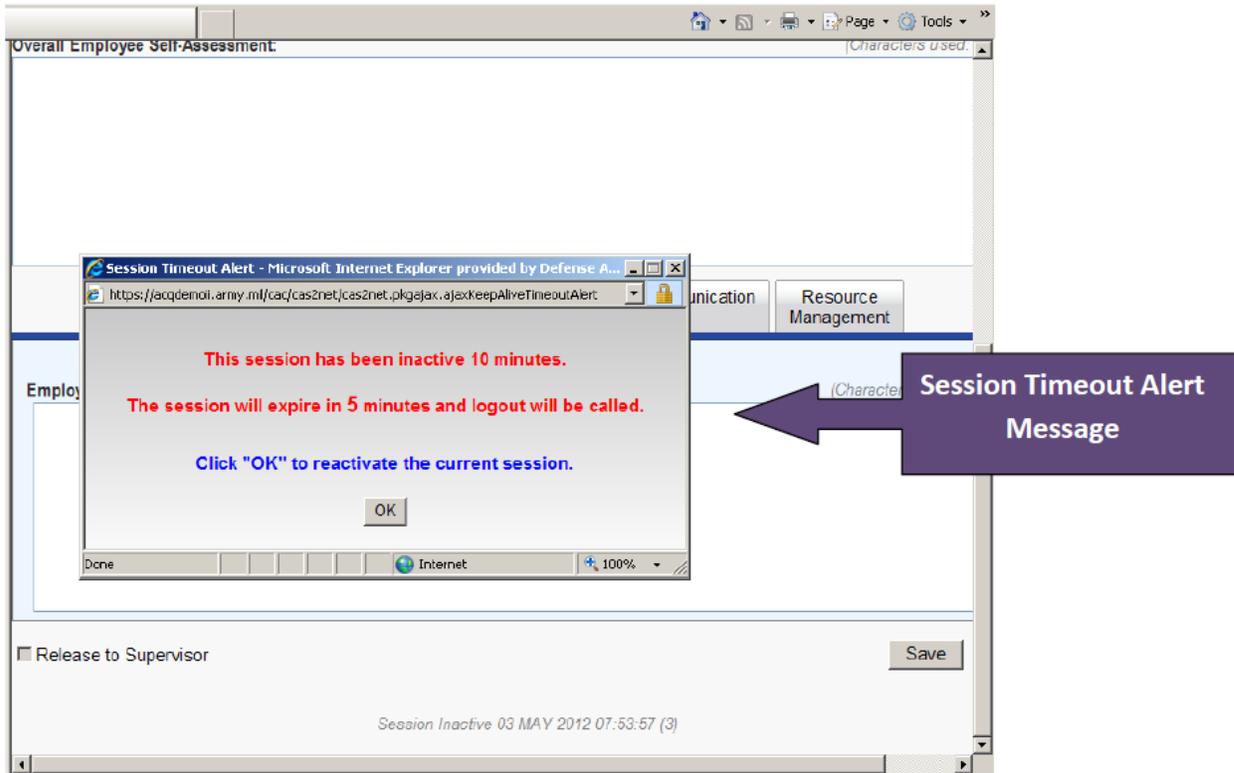


Figure 3-20: Session Timeout Alert Message

- 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.

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**, and **Reports**.

- 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.
- 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.

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 Appleton" web form. At the top, it identifies the user as Adam Appleton and provides options to Revert, Change Session, or Logout. The form includes an "Employee Menu" on the left with links to Contribution Planning, Mid-Point Review Self-Assessment, Annual Appraisal Self-Assessment, and Reports. The main content area displays the following information:

- Year:** 2012
- First Level Supervisor:** Peter Olson
- Broadband Level:** III
- Occupational Series:** 1550 - Computer Science
- Career Path:** NH - Business Management And Technical Management Professional
- Expected OCS Range:** 67 - 70 - 74

Below this information, it states "Contribution Planning 'In Progress': active" and provides a text area for the employee to enter their plan. At the bottom of the form, there is a checkbox for "Release to Supervisor" and "Save" and "Exit" buttons. A session active timestamp "Session Active 12 SEPTEMBER 2012 18:05:52" is displayed at the bottom of the page, along with a privacy notice: "The information contained herein is covered by the Privacy Act of 1974."

Figure 4-1: Employee Contribution Planning Web Form

The employee may check the “Release to Supervisor” checkbox and click “Save” to inform the supervisor that your input is complete. The “Release to Supervisor” checkbox is for information only. As long as status remains “In Progress”, the employee may later clear the “Release to Supervisor” checkbox and “Save” to let the supervisor know that employee input is 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 both the supervisor or employee.
- 2) If “Release to Supervisor” is unchecked when Contribution Planning is finalized, then CAS2Net provides a “Release” button on the employee Contribution Planning web page to allow the employee to update the “Release to Supervisor” status.

“RELEASE” 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.

In cases where the “Release to Supervisor” remains unchecked, CAS2Net provides a “Release” button. The employee may click “Release” to update the employee input status.

The screenshot displays the 'Contribution Planning for Adam Appleton' web page. At the top, it shows the user is acting as Adam 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 Reports'. The main content area shows the year set to 2012 and the supervisor as Peter Olson. Key job details include Broadband Level III, Occupational Series 1550 - Computer Science, Career Path NH - Business Management And Technical Management Professional, and Expected OCS Range 67 - 70 - 74. A status message indicates 'Contribution Planning as of 09/12/2012 18:43: active'. Below this is a large text area for employee input. The 'Method of Communication' section has checkboxes for Face to Face, TeleConference, Video Conference, Email, and Other. A 'Date Conducted' field is set to 07/23/2012. At the bottom, there is a 'Release to Supervisor' checkbox and a 'Release' button.

Figure 4-2: “Release” Employee Contribution Planning

Click “Release” and then “Save” to change employee input status to “Released to Supervisor”.

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.

The screenshot shows a web application interface for 'Contribution Planning for Adam Appleton'. At the top, it indicates the user is acting as Adam Appleton and provides options to 'Revert', 'Change Session', or 'Logout'. A navigation menu on the left includes 'Contribution Planning', 'Mid-Point Review Self-Assessment', 'Annual Appraisal Self-Assessment', and 'Reports'. The main content area displays the following information:

- Year:** 2013 (dropdown menu)
- First Level Supervisor:** Peter Olson
- Broadband Level:** III
- Occupational Series:** 1550 - Computer Science
- Career Path:** NH - Business Management And Technical Management Professional
- Expected OCS Range:** -1

Below this information is a large text input area labeled 'Contribution Planning Input:' with a character count of '(Characters used: 0 of 6000)'. At the bottom left, there is a checkbox labeled 'Release to Supervisor'. At the bottom right, there are 'Save' and 'Exit' buttons. The footer of the page states 'Session Active 13 SEPTEMBER 2012 09:58:46' and 'The information contained herein is covered by the Privacy Act of 1974.'

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. “Release to Supervisor” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state. Unchecking “Release to Supervisor” does not prevent the supervisor from submitting the Contribution Planning as “complete”.
3. When the supervisor has saved **any** factor score in the Annual Appraisal, all employee assessment content is locked—including current year Contribution Planning, Mid-Point Review Self-Assessment and Annual Appraisal 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.
- “Employee Self-Assessment” where employee enters his achievements overall or with respect to each AcqDemo performance factor.

The screenshot shows the "Mid-Point Review Self-Assessment for Adam Appleton" web form. The page header includes the AcqDemo logo and the text "You are acting as Adam Appleton" with links for "Revert", "Change Session", and "Logout". The main title is "Mid-Point Review Self-Assessment for Adam Appleton" with "Year: 2012". Below the title, the "First Level Supervisor" is listed as Peter Olson. The form displays several attributes: Broadband Level (III), Occupational Series (1550 - Computer Science), Career Path (NH - Business Management And Technical Management Professional), and Expected OCS Range (67 - 70 - 74). The "Contribution Planning" section contains a text area with the placeholder text "Here is the employee input to start the plan." The "Overall Employee Self-Assessment" section has a large text area with a character count of 0 of 4000. Below this is a row of tabs for performance factors: Problem Solving, Teamwork / Cooperation, Customer Relations, Leadership / Supervision, Communication, and Resource Management. The "Problem Solving" tab is selected, showing an "Employee Self-Assessment" text area with a character count of 0 of 4000. At the bottom, there is a checkbox for "Release to Supervisor" and "Save" and "Exit" buttons. The footer includes the text "Session Active 13 SEPTEMBER 2012 10:04:21" and "The information contained herein is covered by the Privacy Act of 1974."

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 “Release to Supervisor” and then click “Save” when you are satisfied with your evaluation to inform your supervisor that the self-assessment is complete.
- Uncheck “Release to Supervisor” and click “Save” to inform the supervisor that you need to change the self-assessment and its status is back to “In Progress”.

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. “Release to Supervisor” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state. Unchecking “Release to Supervisor” does not prevent the supervisor from entering information in the Mid-Point Review.
3. The self-assessment page is displayed as “Read Only” when the supervisor has saved **any** information into the Mid-Point Review.
4. When the supervisor has saved **any** factor score in the Annual Appraisal, all employee assessment content is locked—including Contribution Planning, Mid-Point Review Self-Assessment and Annual Appraisal 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.
- “Employee Self-Assessment” where employee enters his achievements overall or with respect to each AcqDemo performance factor.

The screenshot shows the "Annual Appraisal Self-Assessment for Adam Appleton" web form. At the top, it identifies the user as Adam Appleton and provides navigation links (Revert, Change Session, Logout). The main title is "Annual Appraisal Self-Assessment for Adam Appleton" with the year "Year: 2012". Below this, it lists the "First Level Supervisor: Peter Olson" and four key attributes: "Broadband Level: III", "Occupational Series: 1550 - Computer Science", "Career Path: NH - Business Management And Technical Management Professional", and "Expected OCS Range: 67 - 70 - 74".

The "Contribution Planning" section includes a text area for "Here is the employee input to start the plan." Below this is a row of performance factor tabs: "Problem Solving", "Teamwork / Cooperation", "Customer Relations", "Leadership / Supervision", "Communication", and "Resource Management". The "Problem Solving" tab is selected, showing an "Employee Self-Assessment" text area with a character count of 0 of 4000. At the bottom, there is a "Release to Supervisor" checkbox and "Save" and "Exit" buttons. A footer note states: "The information contained herein is covered by the Privacy Act of 1974."

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 “Release to Supervisor” and then click “Save” when you are satisfied with your evaluation to inform your supervisor that the self-assessment is complete.
- Uncheck “Release to Supervisor” and click “Save” to inform the supervisor that you need to change the self-assessment and its status is back to “In Progress”.

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. “Release to Supervisor” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state. Unchecking “Release to Supervisor” does not prevent the supervisor from entering information in the Annual Appraisal.
3. When the supervisor has saved **any** factor score in the Annual Appraisal, all employee assessment content is locked—including Contribution Planning, Mid-Point Review Self-Assessment and Annual Appraisal Self-Assessment.
4. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.4 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 II and III – Single Employee
- Mid-Point Review Self-Assessment
- Mid-Point Review

When either self-assessment report is available for printing, CAS2Net displays the report name as a “hot link”. When the report is unavailable for printing, CAS2Net shows the report name as simple text with the caption “(Not Provided)” or “(Not Released)” appended.

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



Figure 4-6: Employee Reports Menu

To generate other reports, click on the report name to bring up the corresponding report options page. Make selections as indicated and click “Generate”.

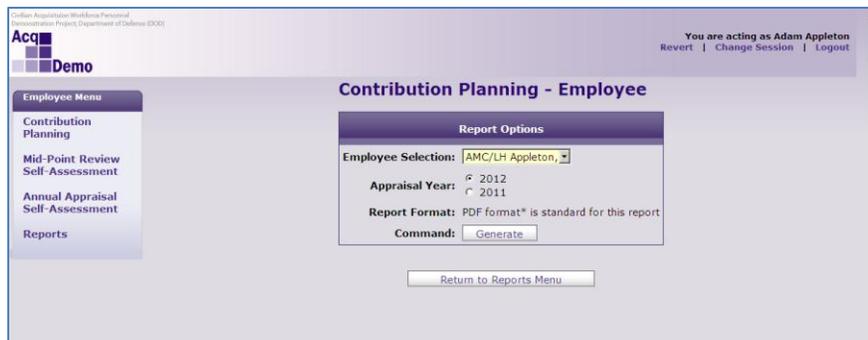


Figure 4-7: Employee Reports Options

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

| | | | |
|---|--|--|----------------------------|
| Contribution Planning for Amy Artis Year: 2011 | | | |
| Broadband Level: II | Occupational Series: 318 - Secretary | Career Path: NH - Business Management and Technical Management Professional | Expected OCS: 48 |
| Contribution Planning: Here is the employee input to start the plan. Here is the supervisors additional input. | | | |
| Method of Communication: Face to Face | | Date Conducted: 07-AUG-11 | |

Figure 4-8: Sample Employee Report

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.

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**, and **Reports**.

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

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

- 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. This feature has not been deployed.
- The **Annual Appraisal** allows the supervisor to document each employee's performance ratings and assessments with respect to the AcqDemo performance factor.
- 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.

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 reopen Contribution Planning 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 1 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 "Release to Supervisor" (Complete)
 - Red 'X' = Employee has saved input without checking "Release to Supervisor" (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



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).

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

- Broadband Level
- Occupational Series
- Career Path
- Expected OCS Range

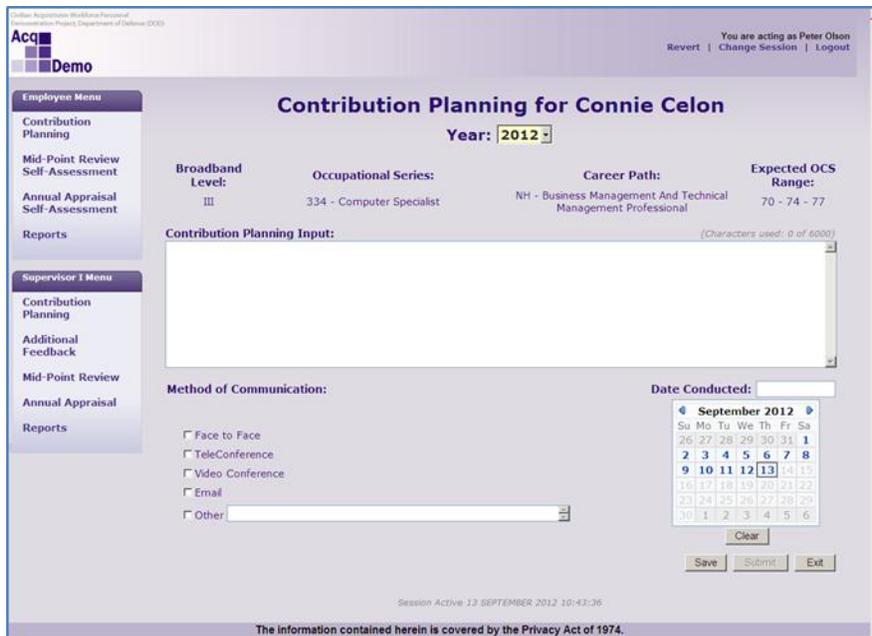


Figure 5-2: Supervisor Contribution Planning Web Form

The supervisor edits and enters text as needed.

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.

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. Note that the “Employee Input” status is unchanged by the “Modify” request.

The screenshot shows a web application interface for 'Contribution Planning for Adam Appleton'. The page title is 'Contribution Planning for Adam Appleton' with a sub-header 'Year: 2012'. The form includes the following fields and options:

- Employee Details:** Broadband Level: III, Occupational Series: 1550 - Computer Science, Career Path: NH - Business Management And Technical Management Professional, Expected OCS Range: 67 - 70 - 74.
- Contribution Planning as of 09/12/2012 18:43: active** (highlighted in green).
- Method of Communication:**
 - Face to Face
 - TeleConference
 - Video Conference
 - Email
 - Other [text input]
- Date Conducted:** 07/23/2012 (with a 'Clear' button).
- Buttons:** 'Modify' and 'Exit'.

The page also features a navigation menu on the left with 'Employee Menu' and 'Supervisor Menu' sections, and a footer note: 'The information contained herein is covered by the Privacy Act of 1974.'

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.

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. “Release to Supervisor” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” 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, all in-cycle assessment content is locked—including current year Contribution Planning, Mid-Point Review and Annual Appraisal Self-Assessments, and Mid-Point Review.
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 checked the “Release to Employee” checkbox or “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 1 Menu, the “Additional Feedback Status” web page is displayed.

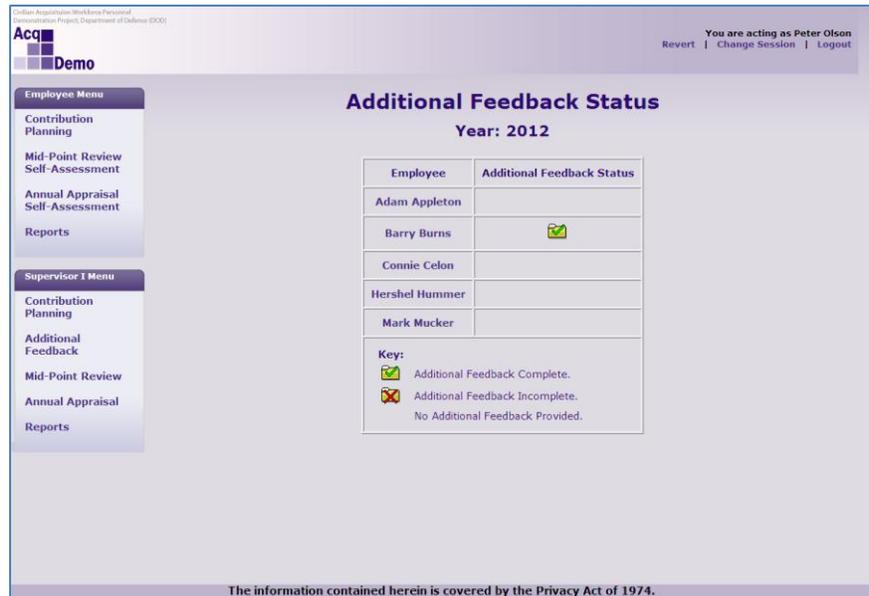


Figure 5-5: Supervisor Additional Feedback Status

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.

CAS2Net populates the screen with last saved information for selected employee (if any). 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:
 - Broadband Level
 - Occupational Series

- Career Path
- Expected OCS Range
- “Contribution Planning” ‘read only’ textbox contains the last submitted information.
- “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 to Employee” checkbox
- “Save”, “Submit”, and “Exit” buttons

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

Acq Demo

You are acting as Peter Olson
Revert | Change Session | Logout

Employee Menu

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

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Reports

Additional Feedback for Connie Celon
As of 09/13/2012 11:03
DO NOT USE FOR MID-POINT REVIEW FEEDBACK

| | | | |
|--------------------------------|--|---|--|
| Broadband Level: III | Occupational Series: 334 - Computer Specialist | Career Path: NH - Business Management And Technical Management Professional | Expected OCS Range: 70 - 74 - 77 |
|--------------------------------|--|---|--|

Contribution Planning:

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

Problem Solving (Selected Tab)

Supervisor Assessment: (Characters used: 0 of 4000)

Release to Employee

Save | Submit | Exit

Session Active 13 SEPTEMBER 2012 11:03:25

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

Figure 5-6: Supervisor Additional Feedback Web Form

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

Note: “Release to Employee” 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 to Employee” button is disabled.

Note (2). “Release to Employee” checkbox is automatically set when 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.

Hot links provide read-only access to previously submitted “Additional Feedback” entries.

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

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Demonstration Project, Department of Defense (DOD)

Acq Demo

You are acting as Peter Olson
Revert | Change Session | Logout

Additional Feedback for Connie Celon

As of 09/13/2012 11:07
DO NOT USE FOR MID-POINT REVIEW FEEDBACK

| | | | |
|--------------------------------|--|---|--|
| Broadband Level: III | Occupational Series: 334 - Computer Specialist | Career Path: NH - Business Management And Technical Management Professional | Expected OCS Range: 70 - 74 - 77 |
|--------------------------------|--|---|--|

Contribution Planning:

Overall Supervisor Feedback:
Feedback for Connie Celon.

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

Method of Communication:

Face to Face
 TeleConference
 Video Conference
 Email
 Other

Date Conducted: 08/07/2012
Clear

Release to Employee

Create Exit

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

Figure 5-7: “Create” Additional Feedback

When “Create” is clicked, CAS2Net opens a clean Additional Feedback web form

Enter the Additional Feedback text; check “Release to Employee” 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, 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 *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. When **any** factor score is saved in the Annual Appraisal, all in-cycle assessment content is locked—including Contribution Planning, Mid-Point Review and Annual Appraisal Self-Assessments, and Mid-Point Review.
3. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.3 Mid-Point Review

Mid-Point Review 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 checked the “Release to Employee” checkbox or “submitted” the Mid-Point Review.

The supervisor can create multiple instances of Mid-Point Review using the “Create” feature.

MID-POINT REVIEW STATUS

When “Mid-Point Review” is selected in the Supervisor 1 Menu, the “Mid-Point Review Status” web page is displayed.

| Employee | Self-Assessment | Mid-Point Review Status |
|----------------|-----------------|-------------------------|
| Adam Appleton | ✓ | |
| Barry Burns | ✓ | ✓ |
| Connie Celon | | |
| Hershel Hummer | | |
| Mark Mucker | | |

Key:

- ✓ Mid-Point Review Complete.
- ✗ Mid-Point Review Incomplete.
- 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**
- **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.

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

- Mid-Point Review “Year”
- Employee attribute subtitle:
 - Broadband Level
 - Occupational Series
 - Career Path
 - Expected OCS Range
- “Contribution Planning” ‘read only’ textbox contains the last submitted information.
- “Overall Employee Self-Assessment” ‘read only’ textbox

- “Overall Supervisor Assessment” 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

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Acq Demo

You are acting as Peter Olson
[Revert](#) | [Change Session](#) | [Logout](#)

Mid-Point Review for Adam Appleton

Year: 2012

| | | | |
|--------------------------------|--|---|--|
| Broadband Level: III | Occupational Series: 1550 - Computer Science | Career Path: NH - Business Management And Technical Management Professional | Expected OCS Range: 67 - 70 - 74 |
|--------------------------------|--|---|--|

Contribution Planning:
Here is the employee input to start the plan.

Overall Employee Self-Assessment:
I have met all performance objectives for the current year.

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:
My problem solving capabilities have helped me perform my work.

Supervisor Assessment: (Characters used: 0 of 4000)

Release to Employee

Session Active 13 SEPTEMBER 2012 11:21:17

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

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

(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 to Employee” 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 to Employee” button to allow the employee to print the “Mid-Point Review Report” while the entry is “In Progress”.

Note: “Release to Employee” 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 Mid-Point Review Status page without saving changes.

After meeting with the employee to review 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 to Employee” button is disabled.

Note (2). “Release to Employee” checkbox is automatically set when Mid-Point Review is submitted.

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. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state.

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

3. Any information saved in the Mid-Point Review supervisor assessment(s) locks the employee’s self-assessment. The supervisor can unlock the self-assessment by removing **all** supervisor assessment text.
4. When **any** factor score is saved in the Annual Appraisal, all in-cycle assessment content is locked—including current year Contribution Planning, Mid-Point Review and Annual Appraisal Self-Assessments, and Mid-Point Review.
5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.4 Annual Appraisal

When “Annual Appraisal” is selected in the Supervisor 1 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 Assessment 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 and “Supervisor Assessment” status are information only; CAS2Net does not enforce any business rules regarding these status values.

| Employee | Self-Assessment | Supervisor Assessment | Categorical Status | Numerical Status | Presumptive Status |
|----------------|-----------------|-----------------------|--------------------|------------------|--------------------|
| Adam Appleton | ✓ | | ✗ | ✗ | None |
| Barry Burns | | ✓ | ✓ | ✓ | None |
| Connie Celon | | ✗ | ✓ | ✓ | Due To Time |
| Hershel Hummer | | ✗ | ✗ | ✓ | None |
| Mark Mucker | | ✗ | ✗ | ✓ | None |

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

Figure 5-10: Annual Appraisal Status

1. Click the employee name to open the Annual Appraisal web page.
2. 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
- “Contribution Planning” ‘read only’ textbox contains the last submitted information.
- “Hot links” provide access to Additional Feedback and Mid-Point Review instances (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.

(Status checkbox and action buttons)

- “Supervisor Assessment Is Complete” checkbox
- “Save” and “Exit” buttons

The screenshot displays the 'Annual Appraisal for Adam Appleton' web form. At the top, it identifies the user as Peter Olson and provides navigation links. The main header shows the appraisal title and year (2012). Below this, key information is presented in a table:

| Broadband Level: | Occupational Series: | Career Path: | Expected OCS Range: | Actual OCS: |
|------------------|-------------------------|--|---------------------|-------------|
| III | 1550 - Computer Science | NH - Business Management And Technical Management Professional | 67 - 70 - 74 | N/A |

The 'Contribution Planning' section contains a large text area for employee input. Below this, a series of tabs allows switching between rating factors: Problem Solving (selected), Teamwork / Cooperation, Customer Relations, Leadership / Supervision, Communication, and Resource Management. The 'Problem Solving' tab is active, showing an 'Employee Self-Assessment' text box with the text: 'My problem solving skills helped me perform my assigned tasks.' Below this, the 'Supervisor Assessment' section includes a text box with 'None', a 'Factor Weight' of 1.0, and two dropdown menus for 'Categorical' (set to 'Unrated') and 'Numeric' (set to 'Unrated'). A character count '(Characters used: 4 of 4000)' is visible at the bottom right of the supervisor assessment text box. At the bottom of the form, there is a checkbox for 'Supervisor Assessment Is Complete' and 'Save' and 'Exit' buttons. A footer note states: 'The information contained herein is covered by the Privacy Act of 1974.'

Figure 5-11: Annual Appraisal Web Form

3. 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.
4. 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”.
5. Click the “Supervisor Assessment Is Complete” checkbox when all assessments have been entered.
6. Click “Save” button to save the appraisal. When “Save” is clicked, CAS2Net saves the content and displays message “Save Successful”.
7. Click “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.
8. As the rating supervisor, you can go back to edit/change the appraisal and save it over and over.

Note (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”.*

Note (2): *If Supervisor needs to change the “Contribution Planning” or Employee needs to change the Self-Assessment, Supervisor can revert all scores (Categorical and Numerical) to “Unrated”, then click “Submit”.*

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. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the employee’s “Release to Supervisor” state.

Employee input status “In Progress” does not prevent the supervisor from saving information in the Annual Appraisal.
3. When **any** factor score is saved in the Annual Appraisal, all in-cycle assessment content is locked—including current year Contribution Planning, Mid-Point Review and Annual Appraisal Self-Assessments, and Mid-Point Review.
4. When copying text from MS Word some special characters in Word may not work in CAS2Net.

5.5 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
- Appraisal Form Parts II By Employees
- Appraisal Form Parts II By Supervisor

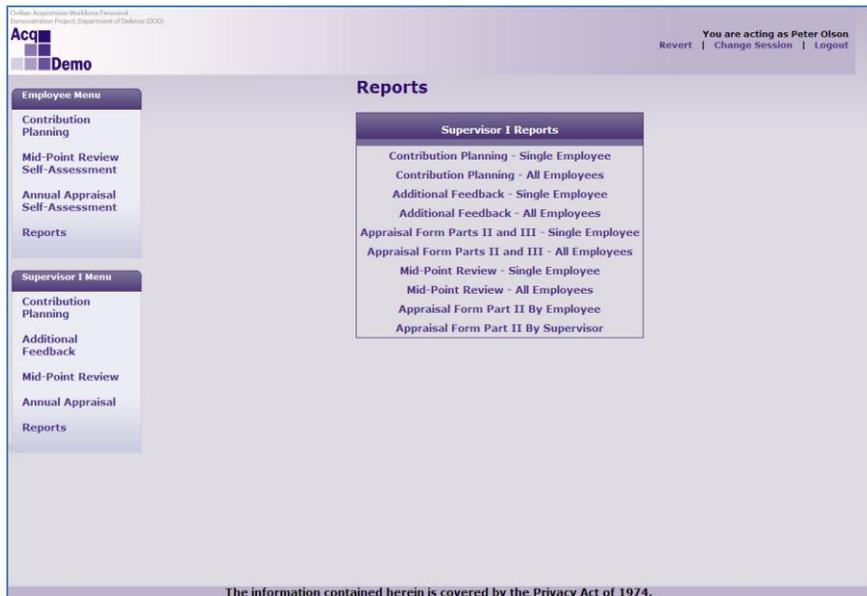


Figure 5-12: Level 1 Supervisor Reports Menu

Refer to Section “10.2 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 “10.2 Supervisor Reports” for report samples.

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



Figure 5-13: Level 1 Supervisor Employee Report Generation Options

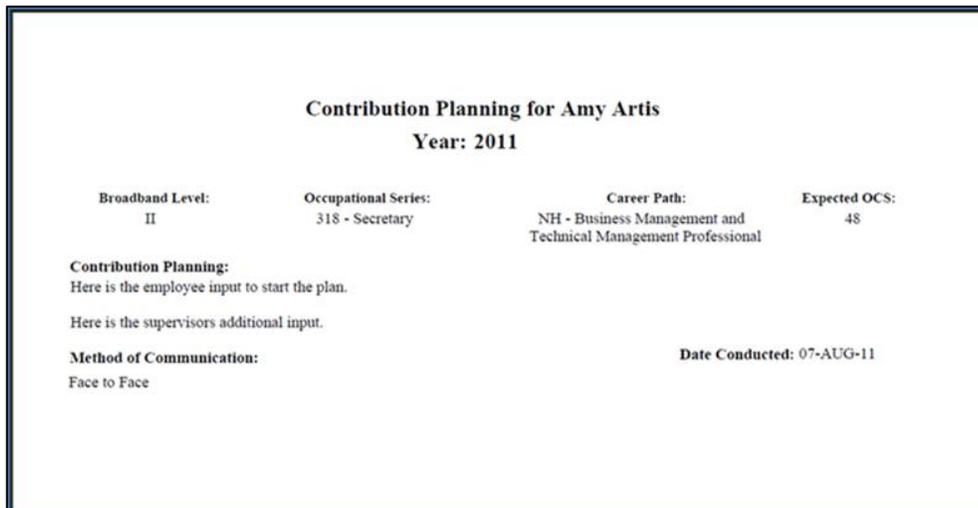


Figure 5-14: Level 1 Supervisor Single Employee Report Sample

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 “10.2 Supervisor Reports” for report samples.

Figure 5-15: Level 1 Supervisor All Employees Report Generation

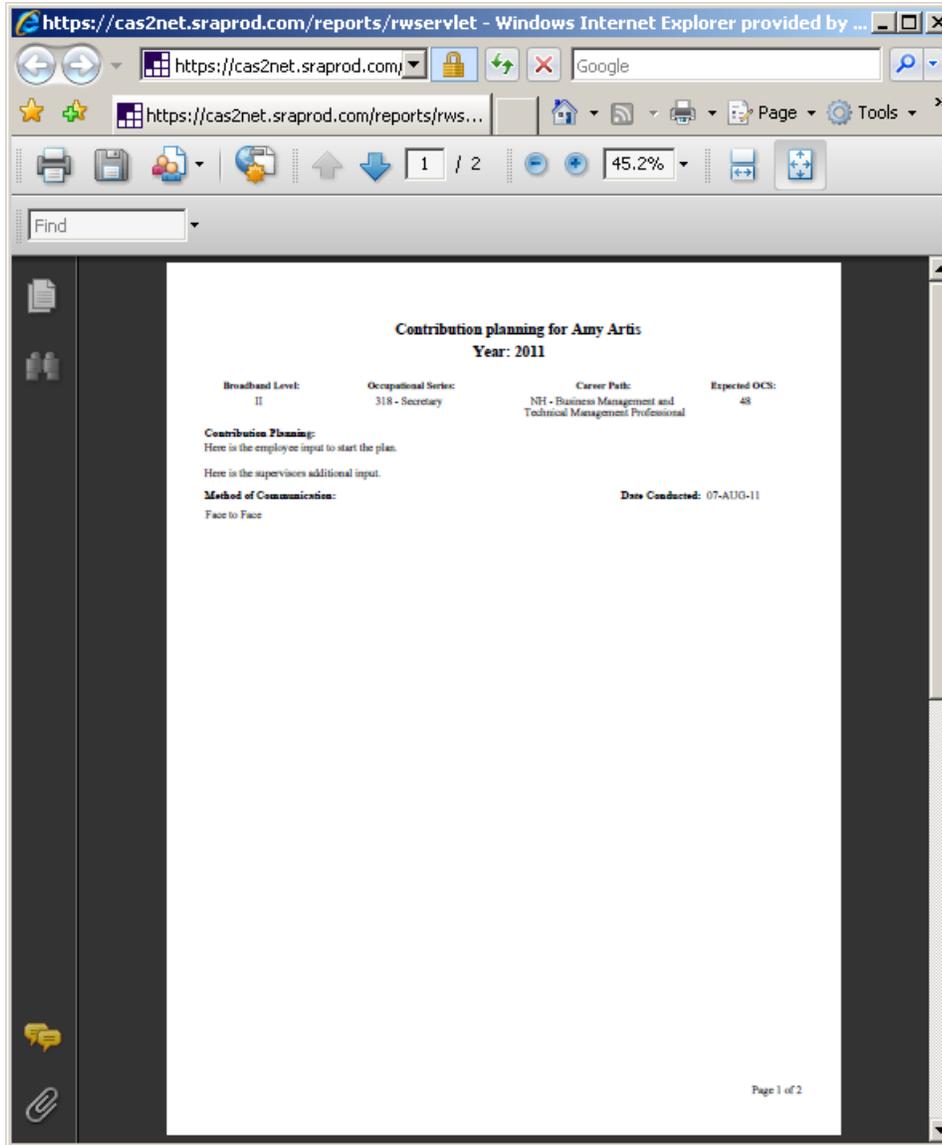


Figure 5-16: Level 1 Supervisor All Employees Report Sample

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.

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**, 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**, and **Annual Appraisal**.

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.
- **Annual Appraisal** reports to view employee performance ratings and assessments with respect to the AcqDemo performance factors.

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.

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**, 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**, and **Annual Appraisal**.

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

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

- 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.

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.

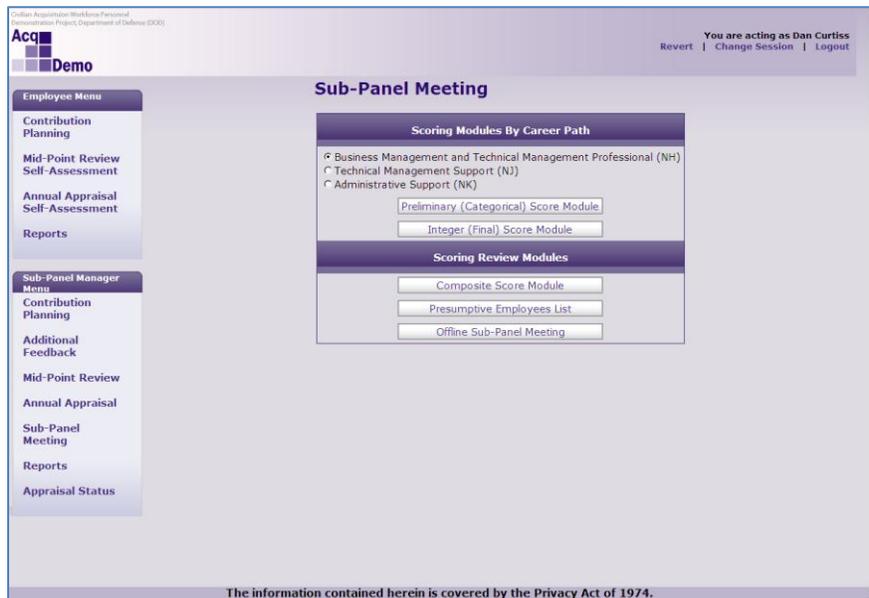


Figure 7-1: Sub Panel Meeting Menu

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.

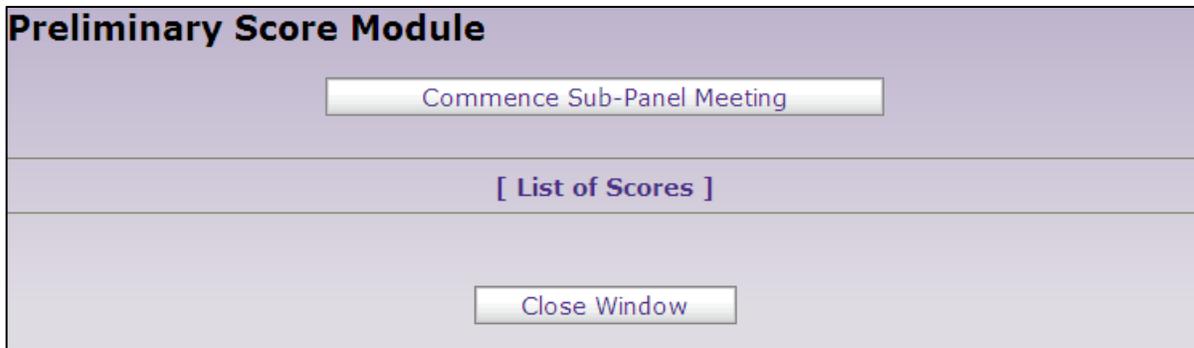


Figure 7-2: Preliminary (Categorical) Score Module “Selection”

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.

| Preliminary Score Module | | | | | | | |
|--------------------------------------|----------------------|-----------------|----------------------|--------------------|------------------------|---------------|---------------------|
| List of Employees Preliminary Scores | | | | | | | |
| 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>Up</p> <p>Left Deselect Right</p> <p>Down</p> <p>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.

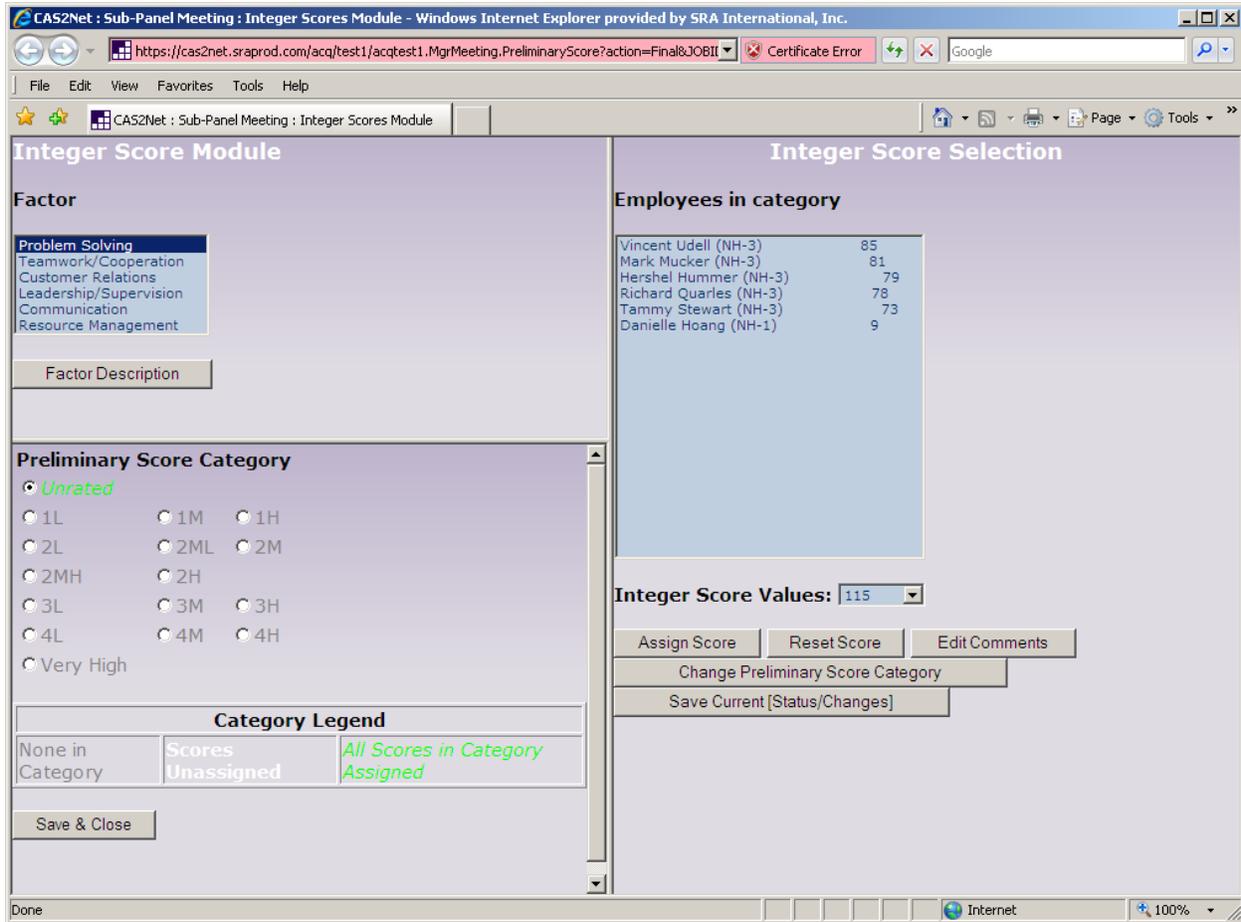


Figure 7-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

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.

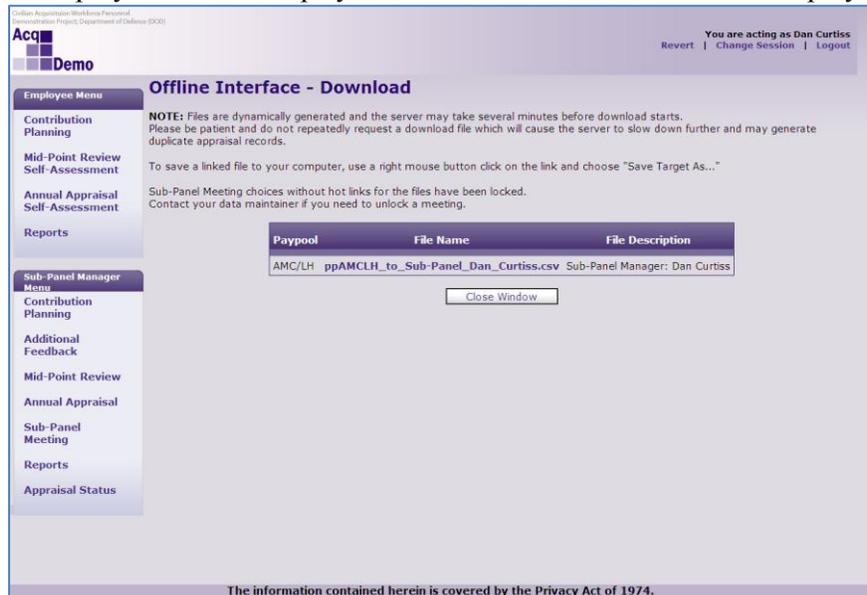


Figure 7-9: Offline Interface – Download Employee Data

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.

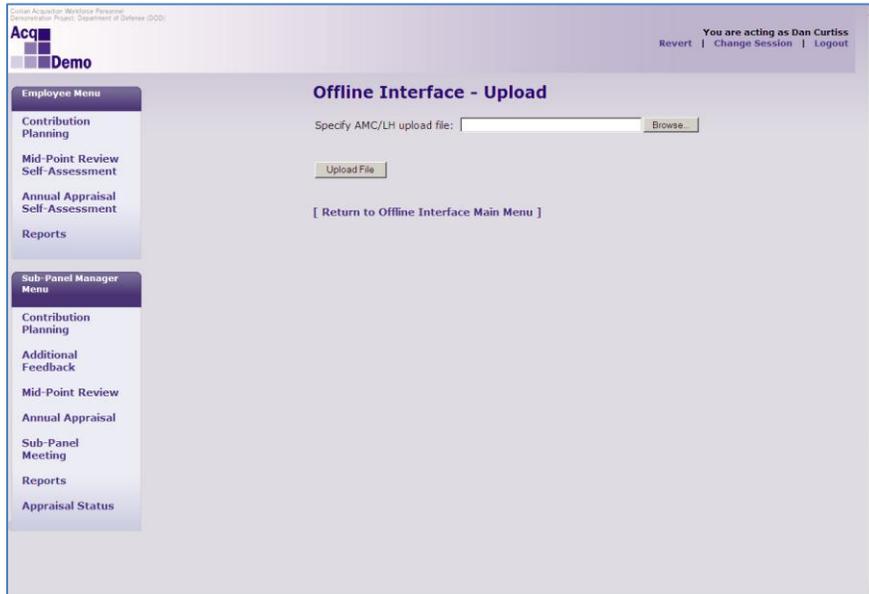


Figure 7-10: Offline Interface – Upload Employee Data

“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.

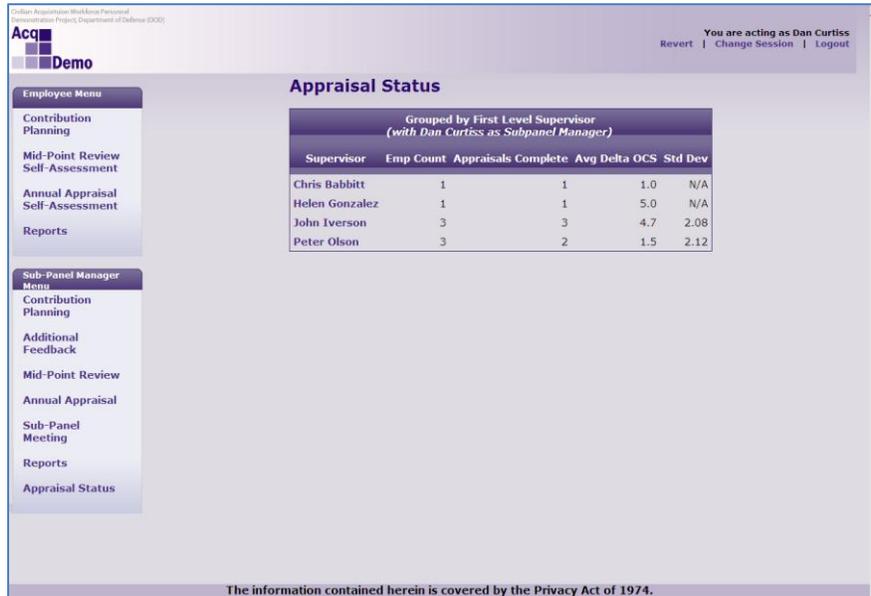


Figure 7-11: Sub-Panel Manager Appraisal Status

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 |

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 II and III – Single Employee
- Appraisal Form Parts II and III – All Employees
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Appraisal Form Part II By Employee
- Appraisal Form Part II by Supervisor
- Appraisal Status Report

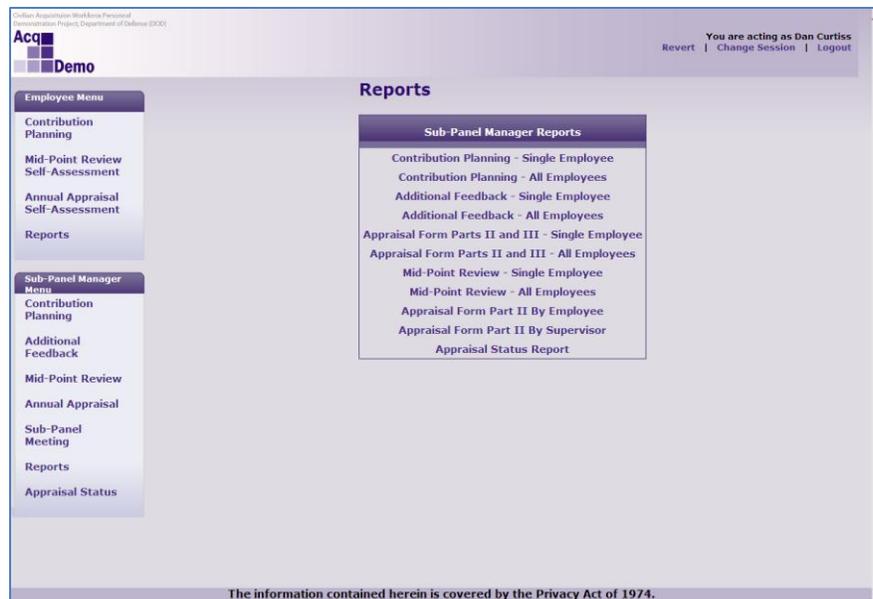


Figure 7-13: Sub-Panel Manager Reports Menu

Refer to Section “10.2 Supervisor Reports” for samples of each report.

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.

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** and **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**, and **Annual Appraisal**.

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

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

- The **Sub-Panel Meeting** option provides the tools for comparing “Categorical” and “Numerical” scores across all employees in the pay pool.
- 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.

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.

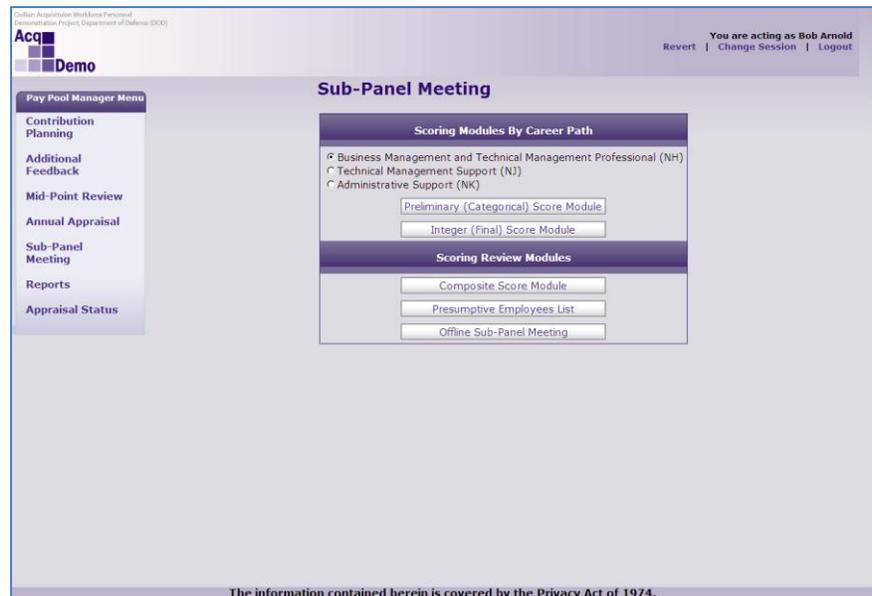


Figure 8-1: Sub Panel Meeting Menu

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.

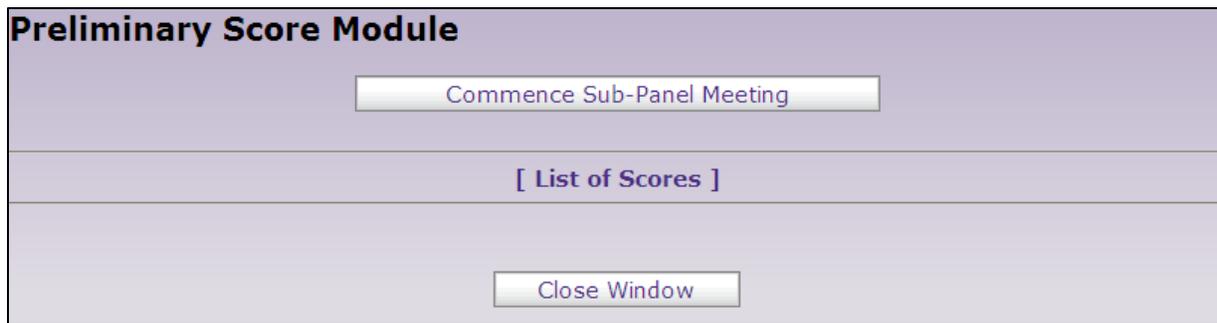


Figure 8-2: Preliminary (Categorical) Score Module “Selection” Menu

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.

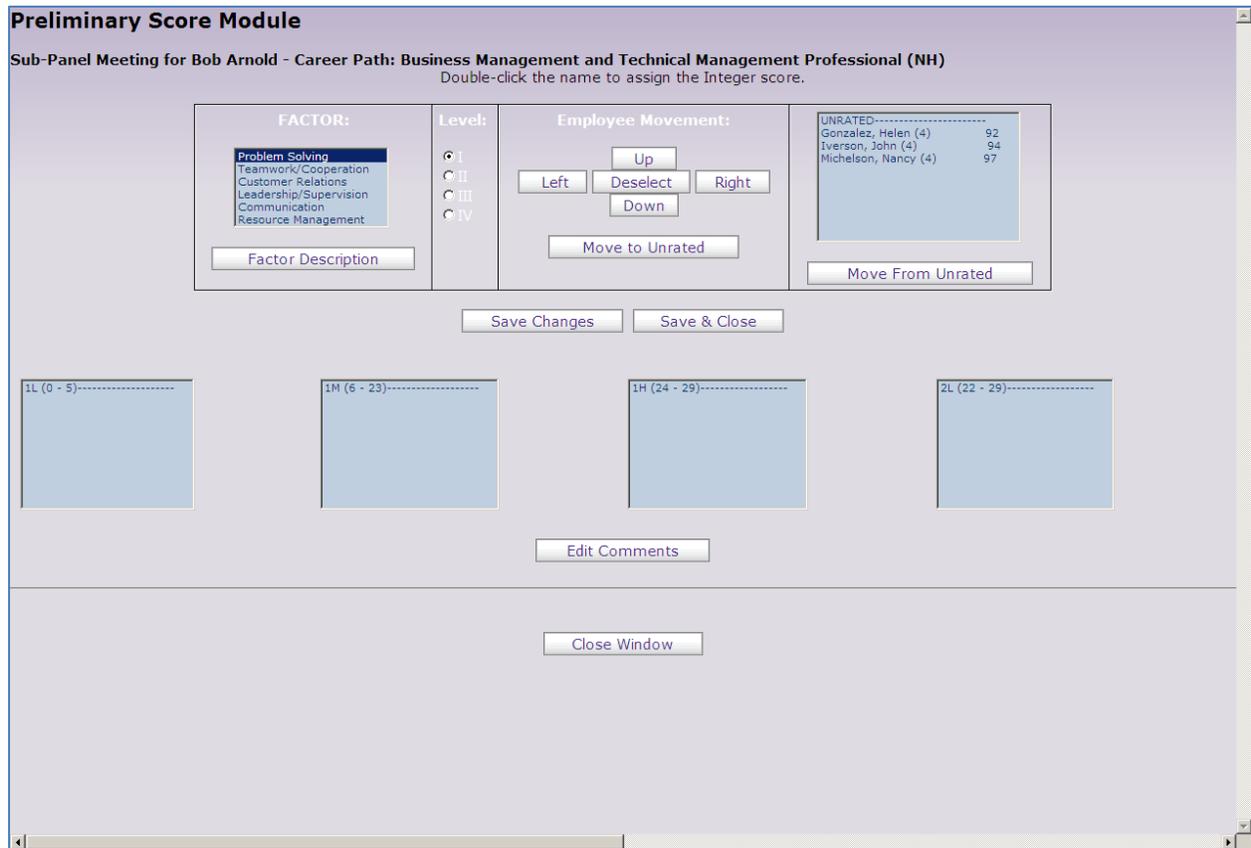


Figure 8-4: Preliminary (Categorical) Score Module Web Page

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”.

| 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.

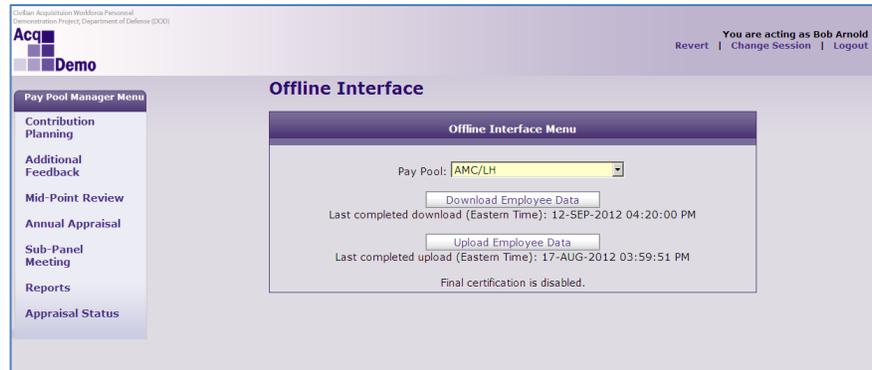


Figure 8-8: Sub Panel Meeting “Offline Interface” Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

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

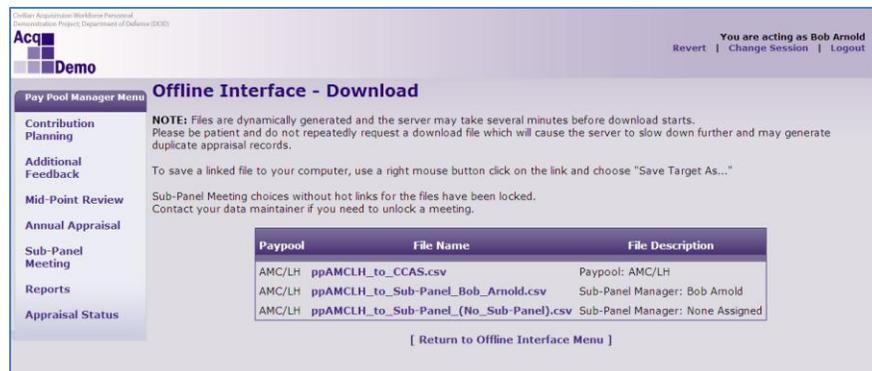


Figure 8-9: Offline Interface – Download Employee Data

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 1st and/or 2nd Level Supervisor.



Figure 8-11: Pay Pool Manager Appraisal Status

Pay Pool Managers are shown sub-panel employees grouped by 2nd 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 II and III – Single Employee
- Appraisal Form Parts II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Appraisal Form Parts II By Employee
- Appraisal Form Parts II By Supervisor
- Appraisal Status Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor

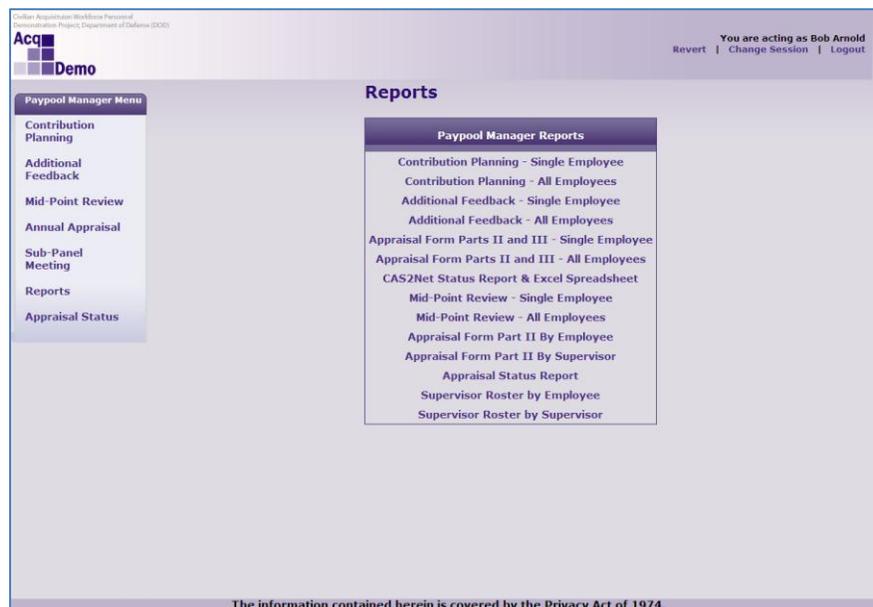


Figure 8-13: Pay Pool Manager Reports Menu

Refer to Section “10.2 Supervisor Reports” for samples of each report.

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.

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**, and **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**, and **Annual Appraisal**. These features are detailed in Section “5. Level 1 Supervisor”.

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

- **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 **Paypool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.

9.1 Appraisal Status and Lock

The Appraisal Status and Lock web page provides tools to approve and lock appraisals by 2nd Level Supervisors or Pay Pool Managers. Locking the scores prevents incidental updates after end of cycle activities have commenced.

Appraisal Status and Lock

You are acting as Francis Freeman
Revert | Change Session | Logout

Employee Menu

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

Pay Pool Administrator Menu

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Paypool Notices

Grouped by Paypool Manager

| Manager | Emp Count | Appr Complete | Avg Delta OCS | Std Dev | Lock |
|-----------------|-----------|---------------|---------------|---------|------|
| (not specified) | 1 | 1 | 0.0 | N/A | |
| Bob Arnold | 47 | 43 | 1.8 | 3.38 | |

There are employees with incomplete appraisals. OFF

Grouped by Subpanel Manager

| Manager | Emp Count | Appr Complete | Avg Delta OCS | Std Dev | Lock |
|-----------------|-----------|---------------|---------------|---------|---------------------------|
| (not specified) | 5 | 5 | 1.0 | 3.54 | <input type="radio"/> OFF |
| Bob Arnold | 3 | 2 | -2.0 | 0.00 | <input type="radio"/> OFF |
| Dan Curtiss | 8 | 7 | 3.3 | 2.36 | <input type="radio"/> OFF |
| Francis Evans | 3 | 3 | 4.3 | 3.06 | <input type="radio"/> OFF |
| Helen Gonzalez | 7 | 7 | 2.7 | 3.20 | <input type="radio"/> OFF |
| John Iverson | 10 | 10 | 1.5 | 2.68 | <input type="radio"/> OFF |
| Larry Koenig | 6 | 3 | 4.3 | 3.79 | <input type="radio"/> OFF |
| Nancy Michelson | 6 | 6 | 0.2 | 2.79 | <input type="radio"/> OFF |

Grouped by First Level Supervisor

| Supervisor | Emp Count | Appraisals Complete | Avg Delta OCS | Std Dev |
|-----------------|-----------|---------------------|---------------|---------|
| (not specified) | 1 | 1 | 0.0 | N/A |
| Bob Arnold | 4 | 4 | 1.3 | 4.03 |
| Chris Babbitt | 3 | 1 | 1.0 | N/A |
| Dan Curtiss | 2 | 1 | -2.0 | N/A |
| Eileen Daniels | 5 | 4 | 4.8 | 3.20 |
| Francis Evans | 1 | 1 | -2.0 | N/A |
| George Fites | 4 | 4 | 0.8 | 4.03 |
| Helen Gonzalez | 1 | 1 | 5.0 | N/A |
| Ike Hansen | 3 | 3 | 0.7 | 1.15 |
| John Iverson | 3 | 3 | 4.7 | 2.08 |
| Larry Koenig | 1 | 1 | 7.0 | N/A |
| Nancy Michelson | 2 | 2 | 3.0 | 2.83 |
| Peter Olson | 5 | 4 | 0.3 | 2.06 |
| Richard Quarles | 4 | 4 | 3.8 | 2.36 |
| Tammy Stewart | 3 | 3 | 0.7 | 2.52 |
| Vincent Udell | 3 | 3 | 1.7 | 2.31 |
| Zane Yates | 3 | 3 | 1.3 | 4.04 |

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.

- Appraisal Form Parts II and III – Single Employee
- Appraisal Form Parts II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Appraisal Form Part II By Employee
- Appraisal Form Part II By Supervisor
- 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 9-2: Pay Pool Administrator Reports Menu

Refer to Section “10.2 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 | | 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 | Heleen | | | 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 | | 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 |
| 2511 | Hummer | Hershel | | | 4555 | AMC/LH | None | N | NH | 3 | 0893 | \$76,000 | 80 | AS | n/a | 01-JAN-11 |
| 27 | Irnski | 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 | Jeris | 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.

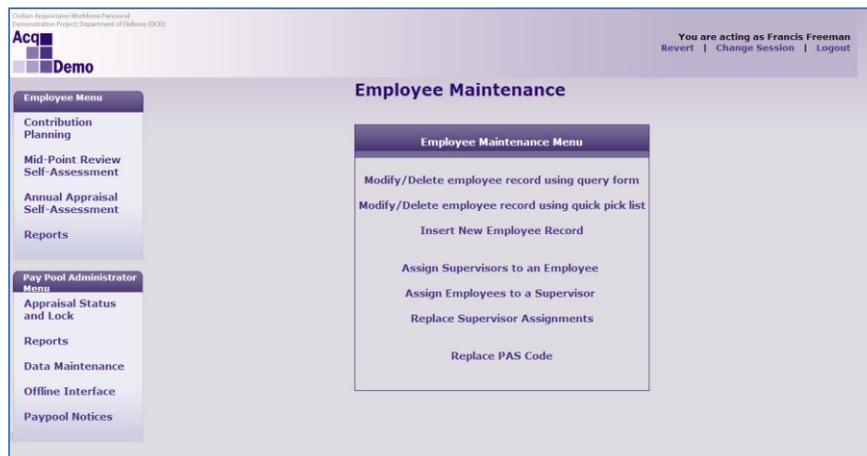


Figure 9-5: Data Maintenance – Employee Maintenance Menu

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)

Acq **Demo**

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

Employee Menu

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

Pay Pool Administrator Menu

- Appraisal Status and Lock
- Reports
- Data Maintenance
- Offline Interface
- Paypool Notices

Look for Employee(s)

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

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: **Paypool 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
 Paypool Manager
 Superuser
 Data Maintainer
 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]

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

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.

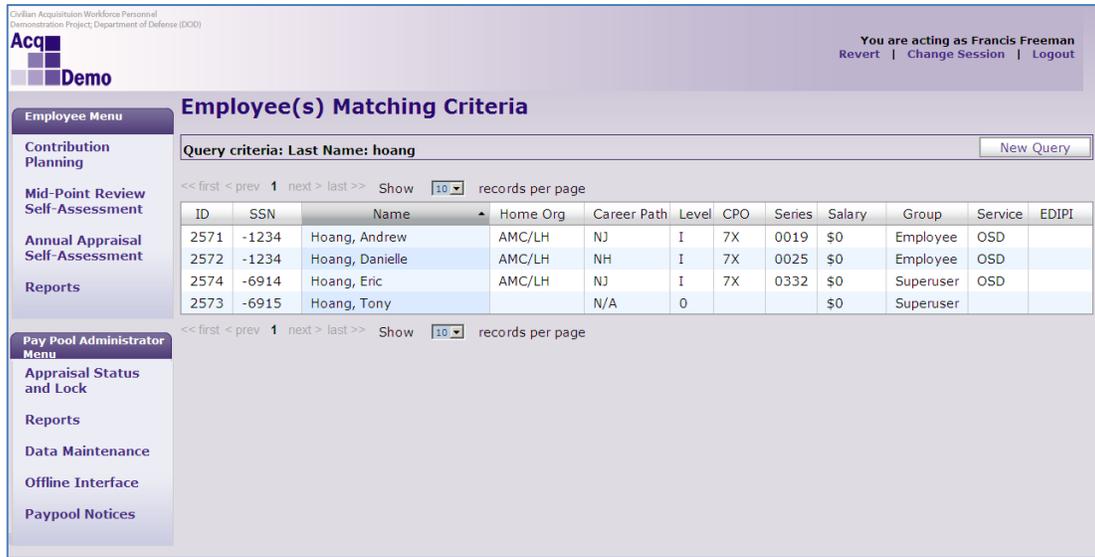


Figure 9-8: Search Employee Record Query Results

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.

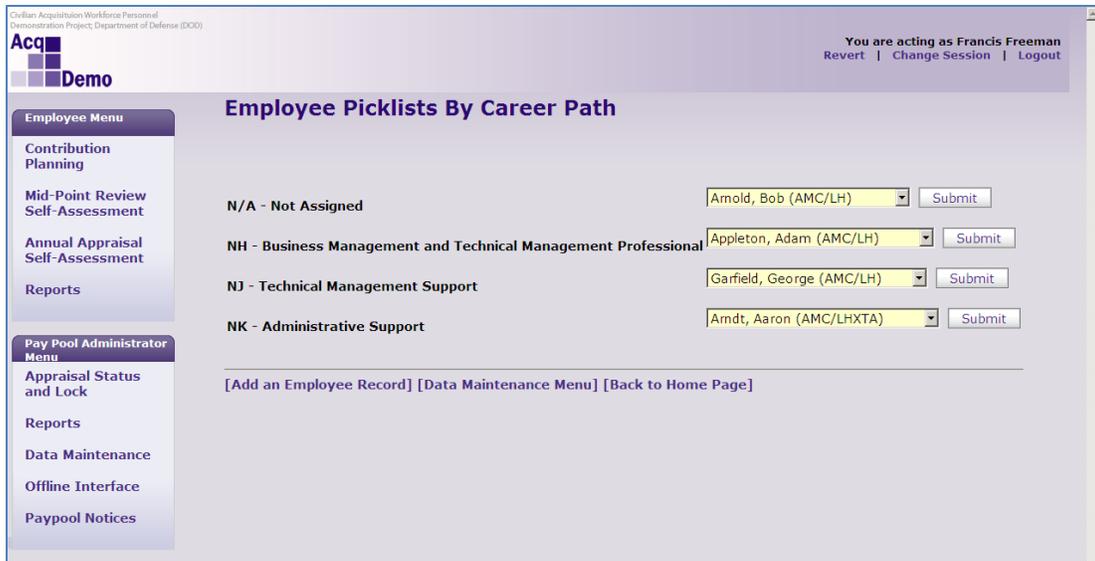


Figure 9-9: Modify/Delete Employee Record Using Quick Pick List

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

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

Acq
Demo

Employee Detail

BOTTOM

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

ID: 2612
Prefix:
First Name: Adam
Middle Initial:
Last Name: Appleton
Suffix:
SSN: 222-11-4444

Part 2: Complete this section for all Demo employees

In Demo: Demo
Start Date: (mm/dd/yyyy) ? 01/01/2011
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:
 None
 Temporary Promotion
 Permanent Promotion
 Demotion
Post-Cycle Activity 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: **Changes to Supervisor must be done using the following link**
[Assign Supervisors]
Level 1 Supervisor: Peter Olson
Level 2 Supervisor:
Sub-Panel Meeting: Dan Curtiss
Paypool Manager: Bob Arnold
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
Series: LOV 1550 COMPUTER SCIENCE
Organization: Paypool Code: AMC/LH
PAS Code (Air Force only):
Office Symbol: AMC/LH 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:
Conducted:
Released:
 Unlock Mid-Point Review

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

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 (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.

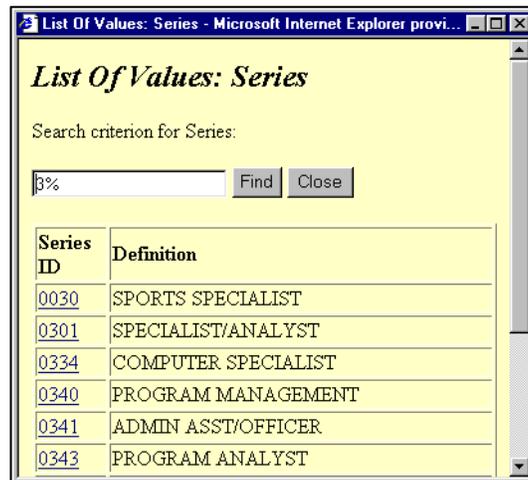


Figure 9-11: Occupational Series “List of Values”

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 section provides a mechanism for setting a completed Mid-Point Review to “In Progress” status.

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, remove all supervisor assessment text, and click “Save”. The supervisor will want to “cut and paste” his assessment information to a backup file to be retrieved later after employee updates are complete.

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).

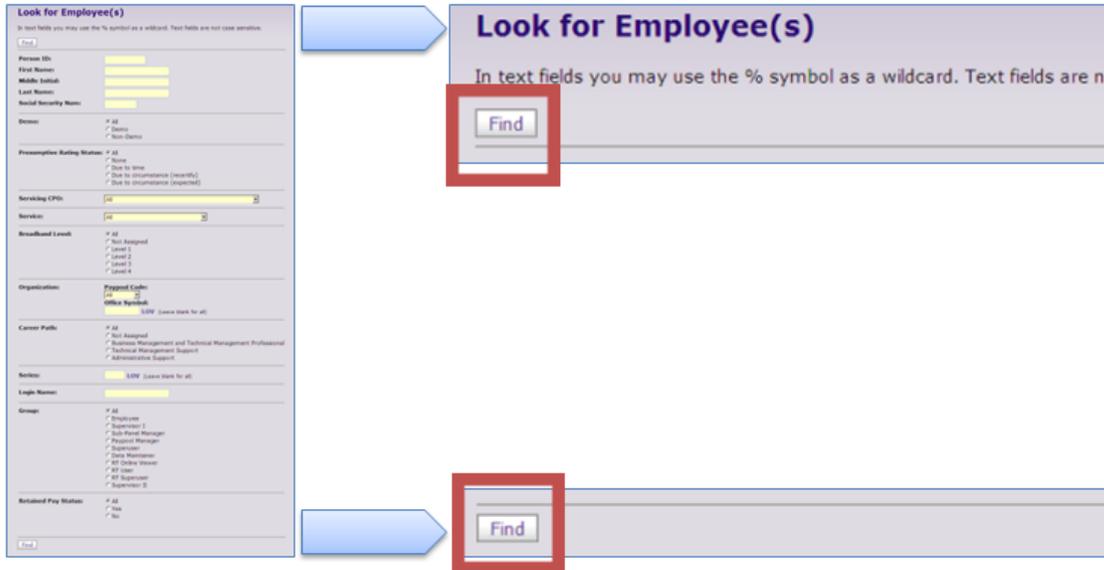


Figure 9-14: Transfer Pay Pool – Employee Search “Find” buttons

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: Paypool: (transfer) New Query

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

| ID | SSN | Name | Home Org | Career Path | Level | CPO | Series | Salary | Group | Service | EDIPI |
|----|-------|------------|----------|-------------|-------|-----|--------|--------|----------|---------|-------|
| 19 | -3720 | Artis, Amy | | 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.

Tip: Generate the Employee Roster report from time to time to check your progress in cleaning up the pay pool database.

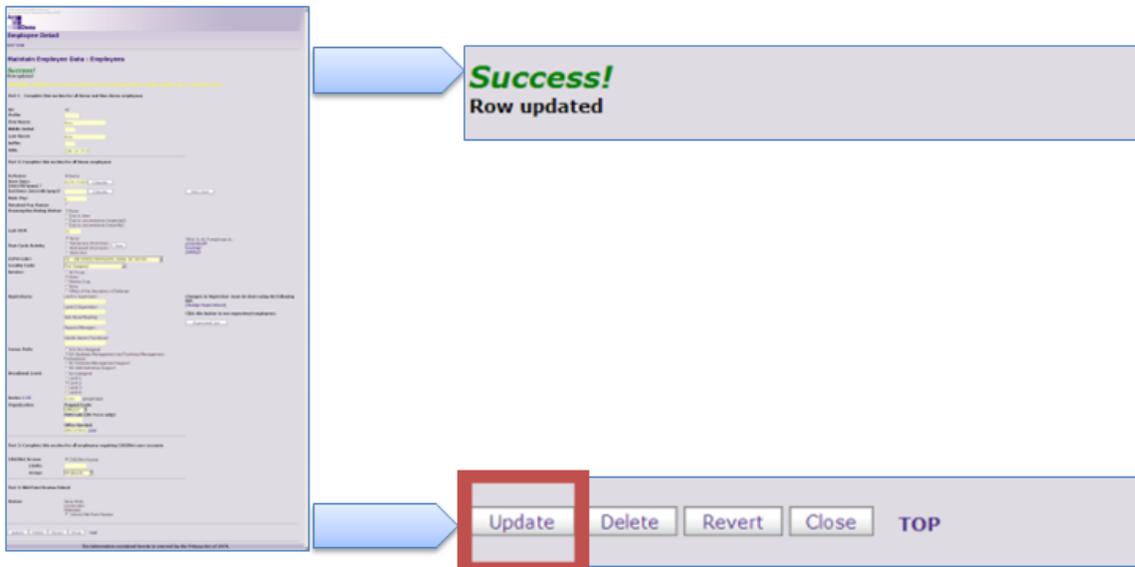


Figure 9-18: Transfer Pay Pool – Employee Detail Update

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).

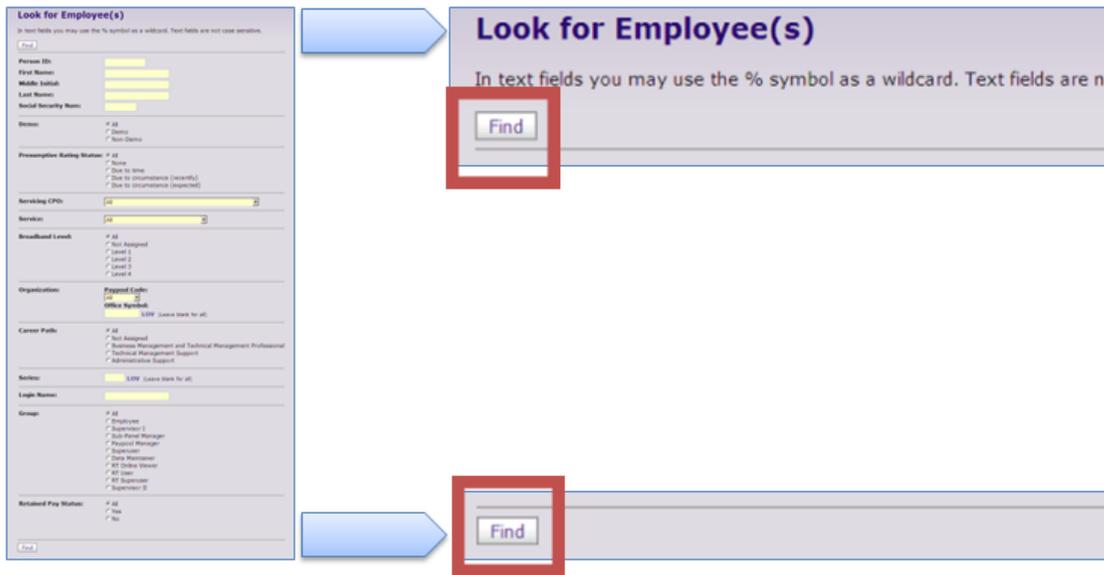


Figure 9-22: Transfer Pay Pool – Employee Search “Find” buttons

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: Paypool: (transfer) New Query

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

| ID | SSN | Name | Home Org | Career Path | Level | CPO | Series | Salary | Group | Service | EDIPI |
|----|-------|------------|----------|-------------|-------|-----|--------|--------|----------|---------|-------|
| 19 | -3720 | Artis, Amy | | 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

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

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.

The screenshot shows the full Employee Detail form. A blue arrow points from the 'Organization' section of the form to a callout box. The callout box contains the following fields:

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.

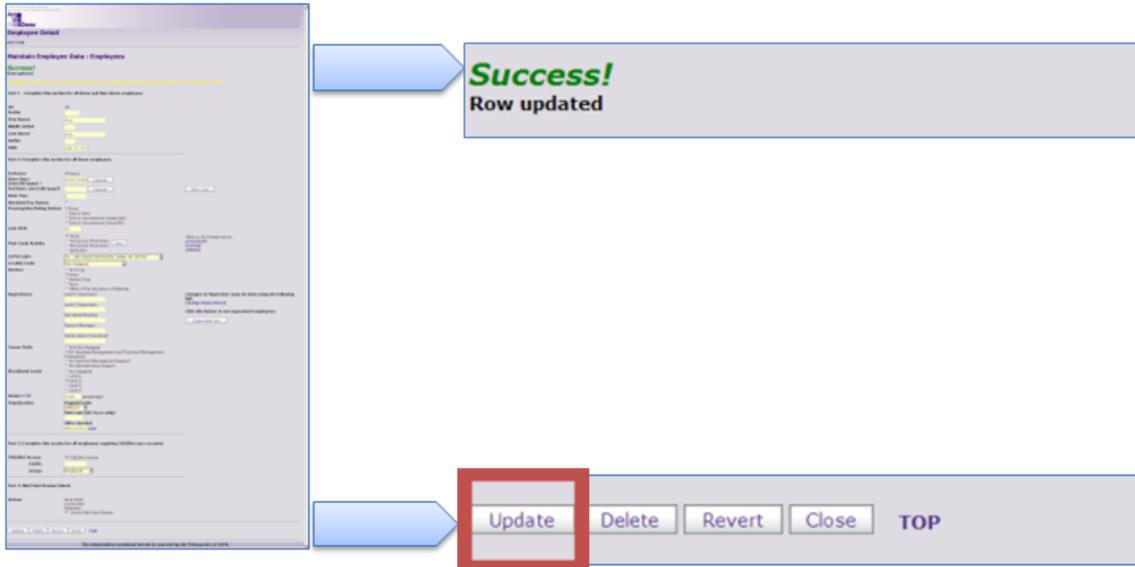


Figure 9-26: Transfer Pay Pool – Employee Detail Update

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.

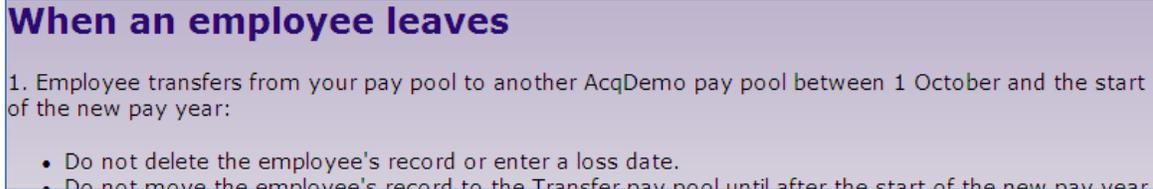
Figure 9-28: What to do if employee is ... promoted?

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?**.



When an employee leaves

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.

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?**](#)

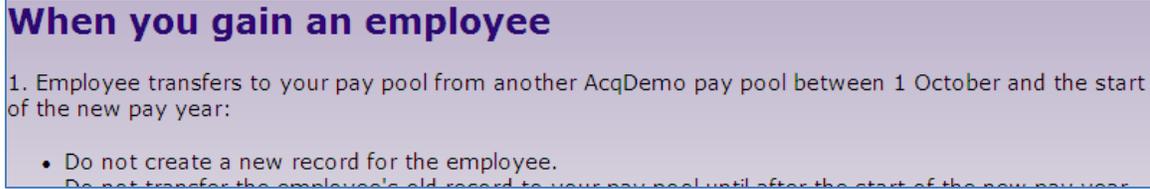


Figure 9-30: What to do if employee is ... joining?

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”.

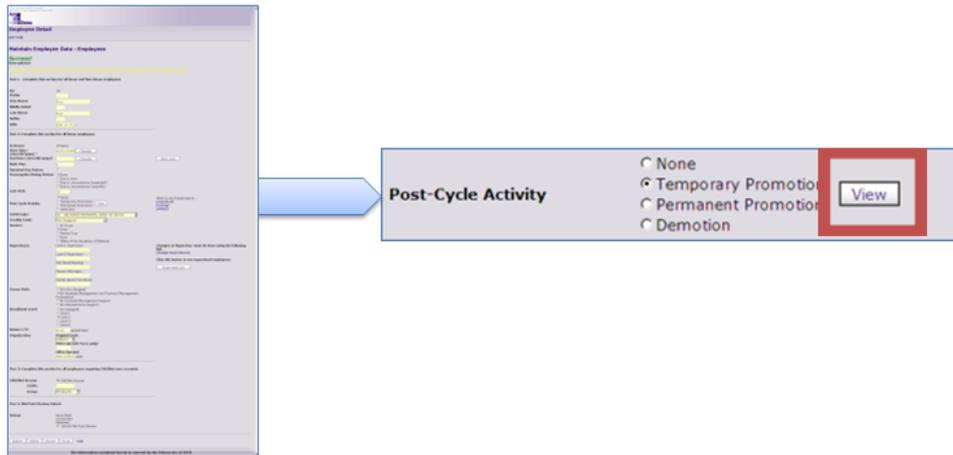


Figure 9-33: Record Post-Cycle Promotion

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 a web form titled 'Temporary Promotion'. It contains the following fields and controls:

- BB Level:** A dropdown menu with '(null)' selected.
- Start Date:** A text input field with 'mm/dd/yyyy' placeholder and a 'Calendar' button.
- End Date:** A text input field with 'mm/dd/yyyy' placeholder and a 'Calendar' button.
- New Basic Pay:** A text input field with '0' entered.
- Series:** A dropdown menu with 'LOV' selected.
- Career Path:** A dropdown menu with 'N/A Not Assigned' selected.
- Buttons:** 'Save', 'Clear', and 'Close' buttons are located at the bottom left.
- Text:** A note at the bottom states: "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 2 is the next highest
- Supervisor 1 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 1
- Sub-Panel Manager can be assigned as Supervisor 1
- 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.

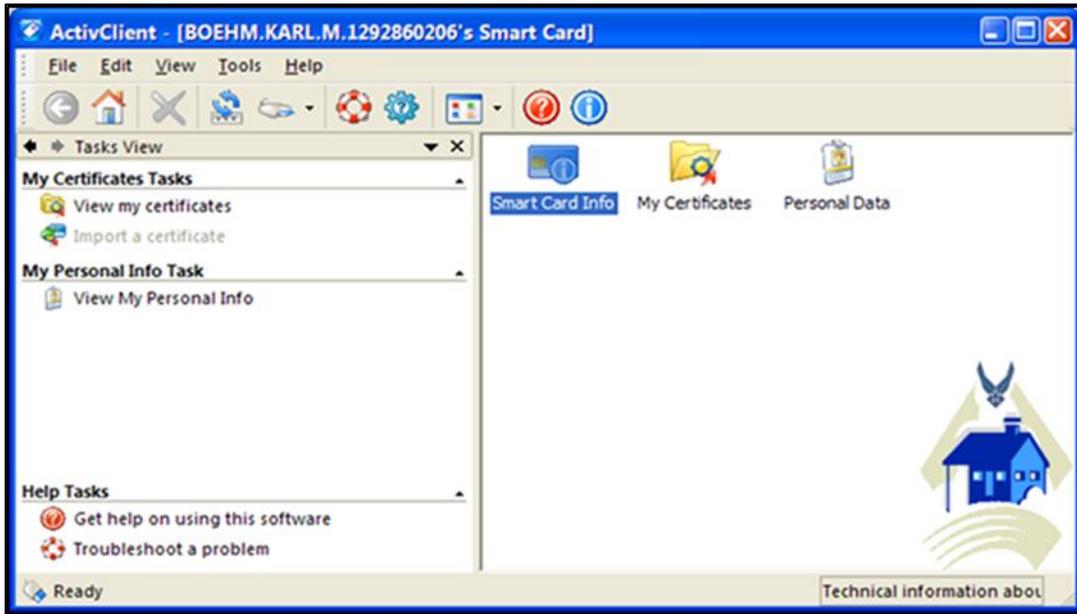


Figure 9-36: Smart Card Info Icon

- 10 digit EDIPI located in the User Name field, and can be copied
4. Copy and send to Pay Pool Administrator to establish account

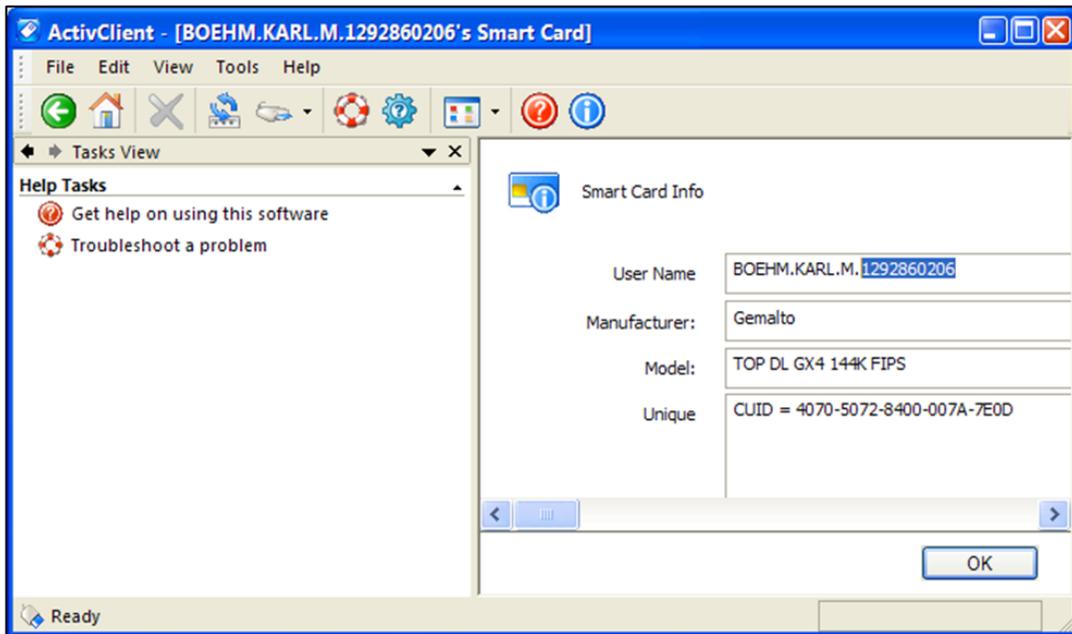


Figure 9-37: Smart Card Information Screen

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

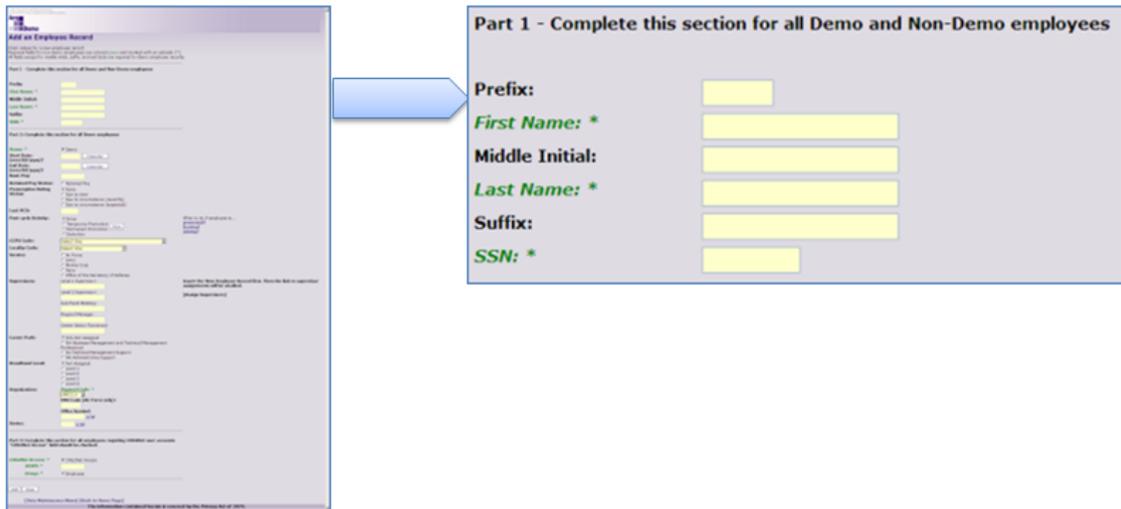


Figure 9-39: Add Employee Record – Part 1

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)? Calendar

End Date: (mm/dd/yyyy)? Calendar

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

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:

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:

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

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

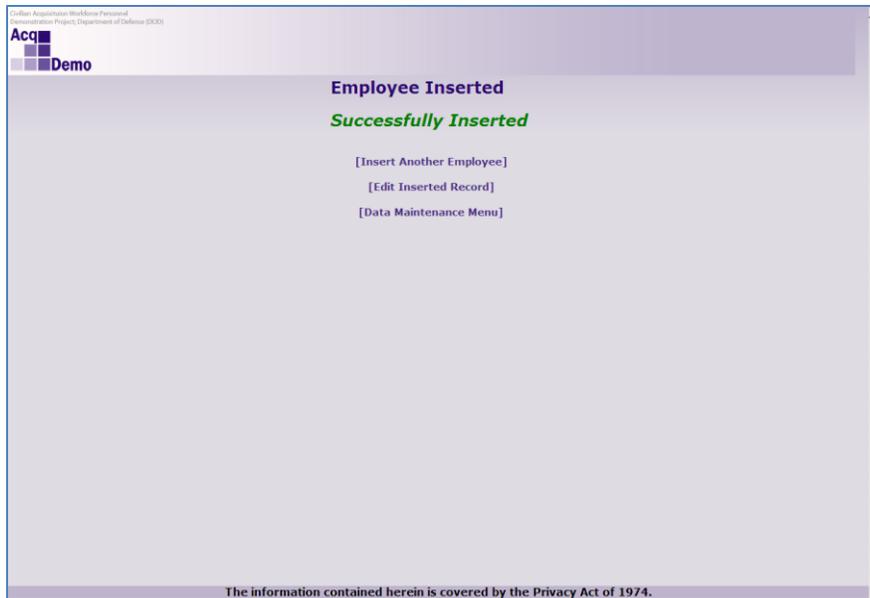


Figure 9-42: Add Employee Record Successful

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 an employee’s name from the dropdown list.

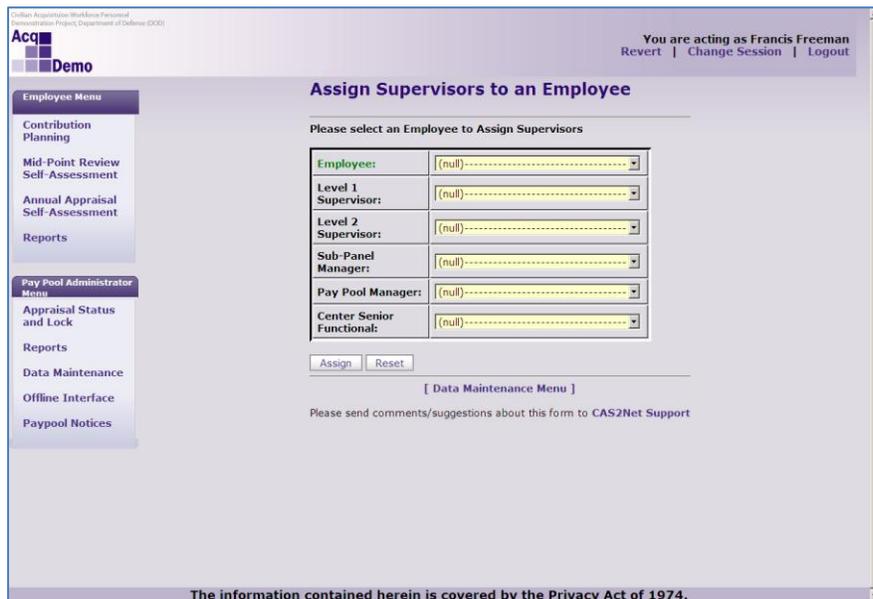


Figure 9-44: Assign Supervisors to an Employee Web Form

CAS2Net refreshes the supervisor dropdown lists to display the selected employee’s current 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 desired supervisors to assign 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.

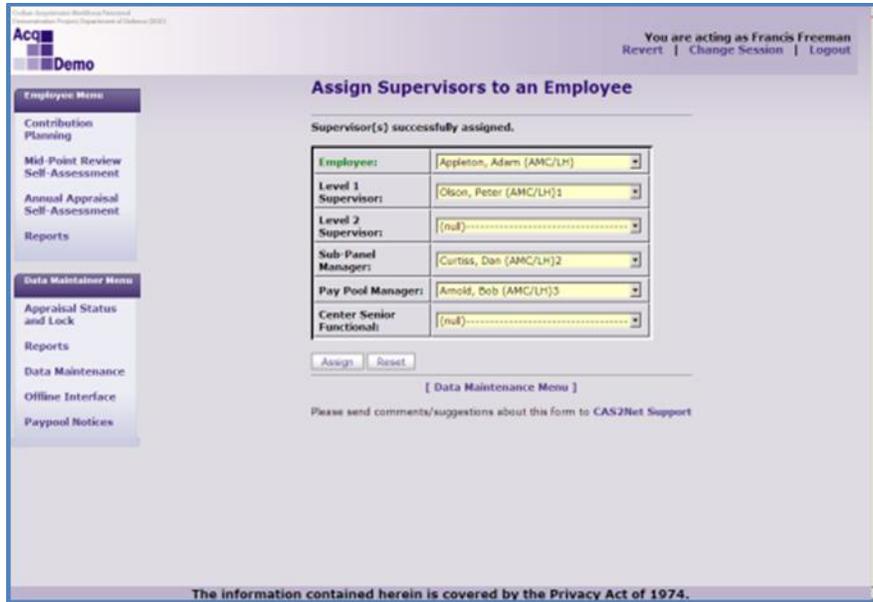


Figure 9-45: Assign Supervisors to an Employee Successful

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 9-46: 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).

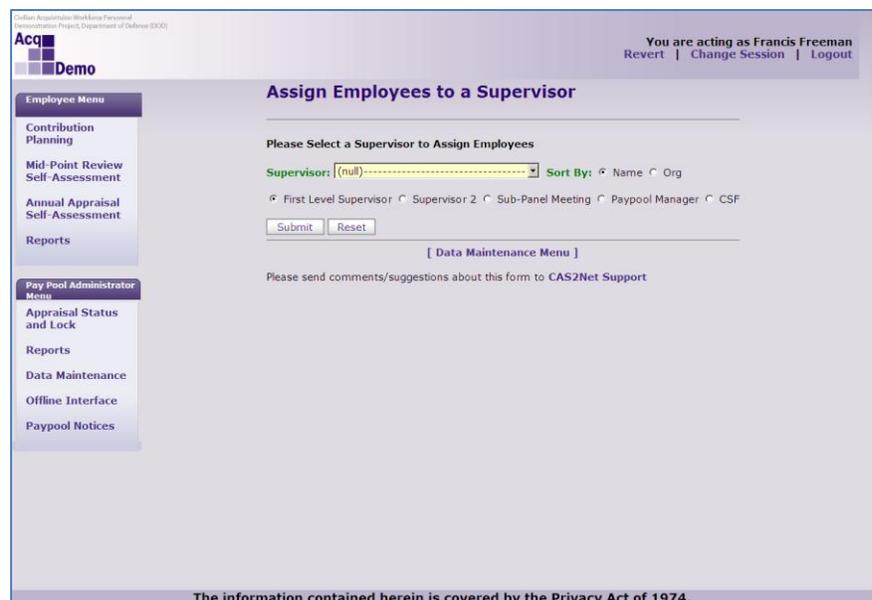


Figure 9-47: Assign Employees to Supervisor – Supervisor Selection

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.

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

Acq
Demo

You are acting as Francis Freeman
Revert | Change Session | Logout

Assign Employees to a Supervisor

Supervisor: Olson, Peter (AMC/LHACA) Sort By: Name Org

First Level Supervisor Supervisor 2 Sub-Panel Meeting Paypool Manager CSF

| | |
|--|---|
| <input type="checkbox"/> Check/Uncheck All | |
| <input checked="" type="checkbox"/> Appleton, Adam (AMC/LH) | <input checked="" type="checkbox"/> Bracken, Billy (AMC/LH) |
| <input checked="" type="checkbox"/> Burns, Barry (AMC/LHACA) | <input checked="" type="checkbox"/> Celon, Connie (AMC/LHACA) |
| <input checked="" type="checkbox"/> Hummer, Hershel (AMC/LH) | <input checked="" type="checkbox"/> Mucker, Mark (AMC/LH) |
| <input type="checkbox"/> Arndt, Aaron (AMC/LHXTA) | <input type="checkbox"/> Artis, Amy (AMC/LHXTA) |
| <input type="checkbox"/> Babbitt, Chris (AMC/LHXSA) | <input type="checkbox"/> Butler, Bryce (AMC/LHXTA) |
| <input type="checkbox"/> Cavasos, Carmen (AMC/LHXTB) | <input type="checkbox"/> Curtiss, Dan (AMC/LHA) |
| <input type="checkbox"/> Dancy, Dyanne (AMC/LHXTB) | <input type="checkbox"/> Donaldson, Dennis (AMC/LHACB) |
| <input type="checkbox"/> Emerson, Erica (AMC/LHXTB) | <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/LHXTA) | <input type="checkbox"/> Freeman, Francis (AMC/LH) |
| <input type="checkbox"/> Garfield, George (AMC/LH) | <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 (AMC/LH) | <input type="checkbox"/> Hoang, Eric (AMC/LH) |
| <input type="checkbox"/> Irnski, 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"/> 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/LHXTA) | <input type="checkbox"/> Rhone, Ronald (AMC/LHADC) |
| <input type="checkbox"/> Sorenson, Sarah (AMC/LHAC) | <input type="checkbox"/> Stewart, Tammy (AMC/LHADA) |
| <input type="checkbox"/> Tarman, Timothy (AMC/LHXSA) | <input type="checkbox"/> Udell, Vincent (AMC/LHADB) |
| <input type="checkbox"/> Ulanov, Uli (AMC/LHXSA) | <input type="checkbox"/> Vinson, Violet (AMC/LHXSB) |
| <input type="checkbox"/> Williams, Wilson (AMC/LHXSB) | <input type="checkbox"/> Yates, Zane (AMC/LHADC) |
| <input type="checkbox"/> Yeakley, Yolanda (AMC/LHXSB) | <input type="checkbox"/> Zurbriggen, Zack (AMC/LHXTA) |

Submit Reset

[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 9-48: 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.

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 9-49: Replace Supervisor Assignments Link

The Replace Supervisor Assignments screen is displayed.

Select a supervisor name from the “Original Supervisor” dropdown list.

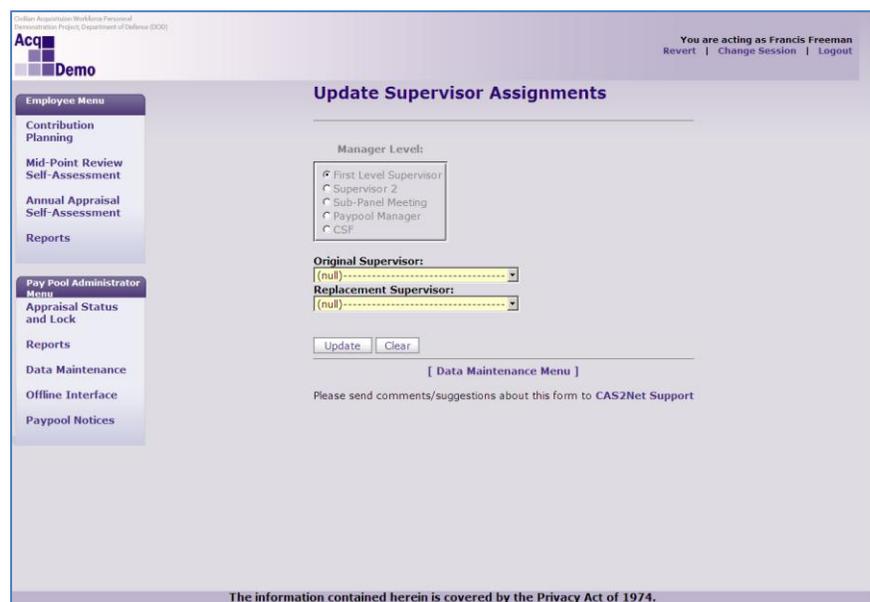


Figure 9-50: Update Supervisor Assignments – Supervisor Selection

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.

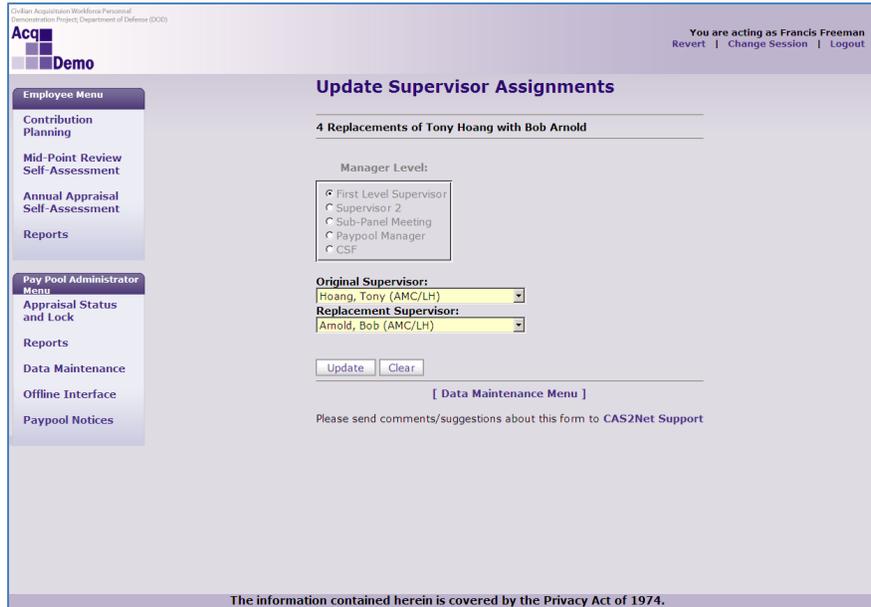


Figure 9-51: Replace Supervisor Assignments Successful

9.3.9 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 9-52: Replace Supervisor Assignments Link

The Replace Supervisor Assignments screen is displayed.



Figure 9-53: 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.

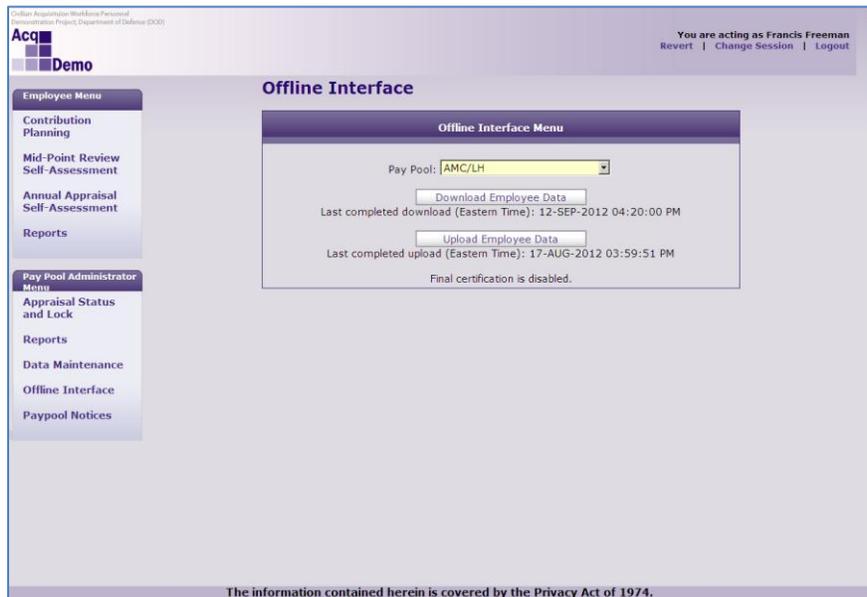


Figure 9-54: Offline Interface Menu

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 (DDO)

Acq Demo

You are acting as Francis Freeman
Revert | Change Session | Logout

Offline Interface - Download

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 data maintainer if you need to unlock a meeting.

| Paypool | File Name | File Description |
|---------|--|------------------------------------|
| AMC/LH | ppAMCLH_to_CCAS.csv | Paypool: AMC/LH |
| AMC/LH | ppAMCLH_to_Sub-Panel_Bob_Arnold.csv | Sub-Panel Manager: Bob Arnold |
| AMC/LH | ppAMCLH_to_Sub-Panel_Dan_Curtiss.csv | Sub-Panel Manager: Dan Curtiss |
| AMC/LH | ppAMCLH_to_Sub-Panel_Francis_Evans.csv | Sub-Panel Manager: Francis Evans |
| AMC/LH | ppAMCLH_to_Sub-Panel_Helen_Gonzalez.csv | Sub-Panel Manager: Helen Gonzalez |
| AMC/LH | ppAMCLH_to_Sub-Panel_John_Iverson.csv | Sub-Panel Manager: John Iverson |
| AMC/LH | ppAMCLH_to_Sub-Panel_Larry_Koenig.csv | Sub-Panel Manager: Larry Koenig |
| AMC/LH | ppAMCLH_to_Sub-Panel_Nancy_Michelson.csv | Sub-Panel Manager: Nancy Michelson |
| AMC/LH | ppAMCLH_to_Sub-Panel_(No_Sub-Panel).csv | Sub-Panel Manager: None Assigned |

[Return to Offline Interface Menu]

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

Figure 9-55: 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.



Figure 9-56: 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 Paypool Notices

Select “Paypool Notices” in the Pay Pool Administrator Menu on the left side navigation bar to display the Pay Pool Notices menu.



Figure 9-57: Paypool Notices Menu

FILE UPLOAD

Click “Upload Paypool Notice” to display the “Paypool Notices – Upload File” options screen.

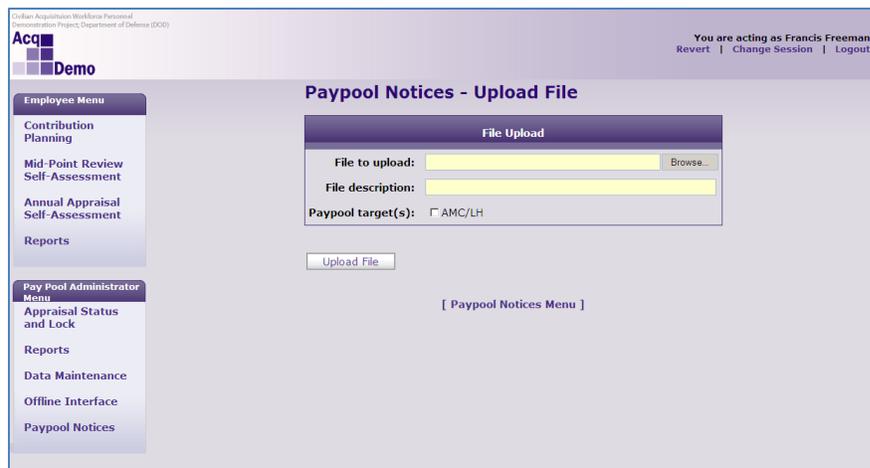


Figure 9-58: Paypool Notices Upload

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 9-59: Paypool Notices Upload Confirmation

VIEW OR DELETE FILE

Click “View/Delete Paypool Notices” in the Paypool Notices Menu to display the Paypool Notices file list.

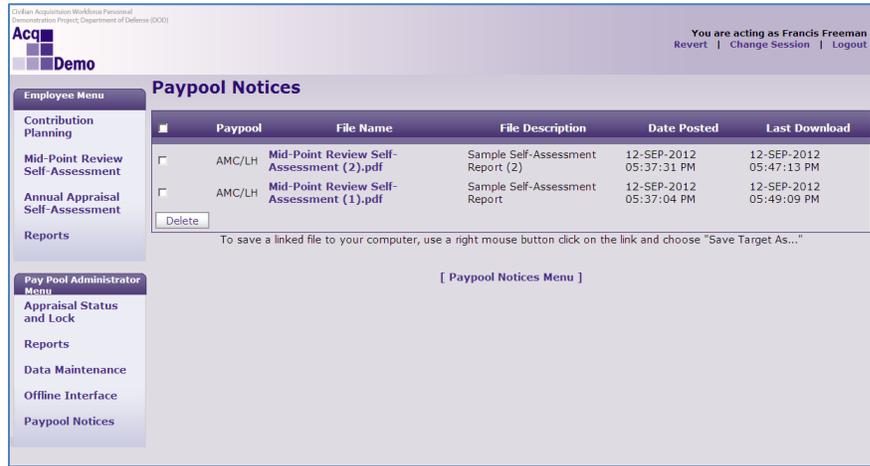


Figure 9-60: Paypool Notices List

Click on a filename link to view [and save] the Paypool 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 9-61: Paypool Notices – Delete Files Successful

10. SUPERUSER

This section provides guidance for the CAS2Net Superuser on how to use CAS2Net to oversee pay pool operations.

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**, 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**, and **Annual Appraisal**. These features are detailed in Section “5. Level 1 Supervisor”.

The following options appear in the Superuser navigation bar after you have successfully logged in: **Appraisal Status and Lock**, **Reports**, **Data Maintenance**, **Offline Interface**, **Paypool Notices**, and **Session Maintenance**.

- **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 “8.1 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 “8.3 Data Maintenance” for information relating to data maintenance functions.

- 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”.

Section “8.4 Offline Maintenance” describes the CAS2Net to CCAS Spreadsheet “Offline Interface”.

- The **Paypool Notices** option provides the capability to generate Employee Notice documents detailing individual payout information.

Refer to Section “8.5 Paypool Notices” for information on this feature.

- 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.

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 Part II and III – Single Employee
- Appraisal Form Part II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Appraisal Form Part II By Employee
- Appraisal Form Part II By Supervisor
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster By Employee
- Supervisor Roster By Supervisor
- Zone A/CIP Report

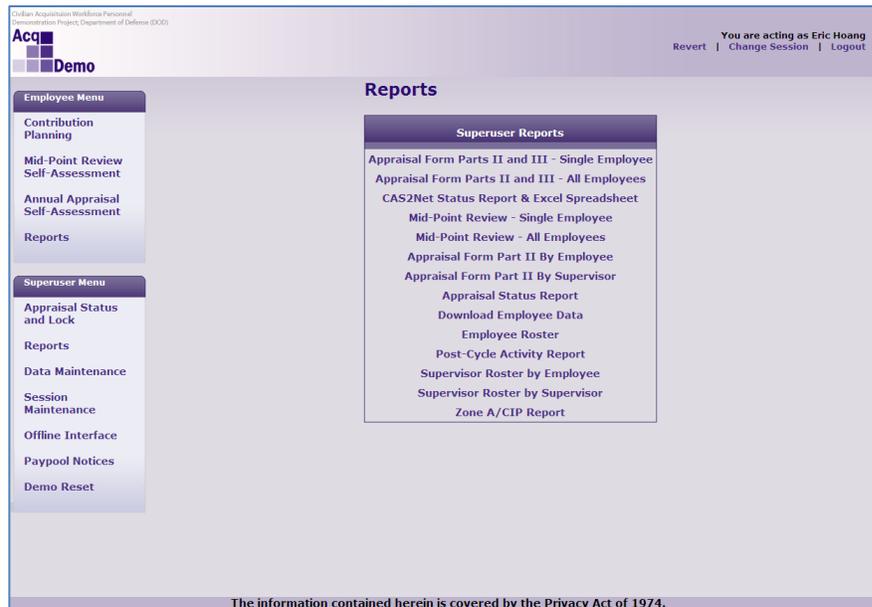


Figure 10-1: Superuser Reports Menu

Section “10.2 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:

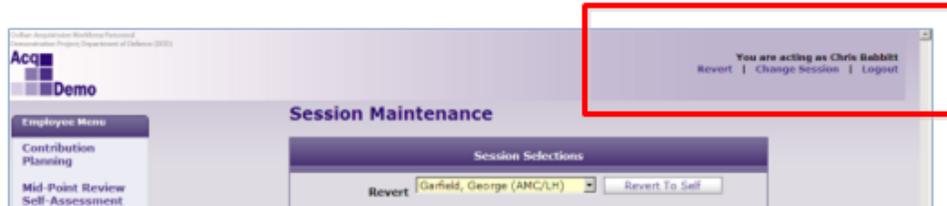


Figure 10-3: Session Maintenance – “Current Role Is...” Screen

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

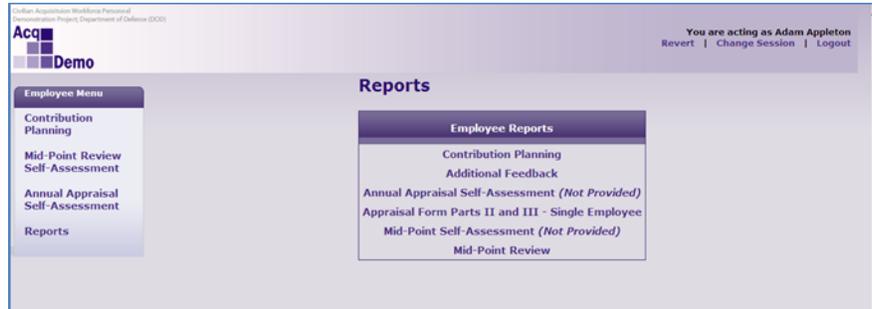


Figure 11-1 : Employee Reports Menu

11.1.1 Contribution Planning

- From the CAS2Net employee report menu, select Contribution Planning (only when provided).
- CAS2Net displays Contribution Planning reports (see figure: Sample Employee Contribution Planning Report).

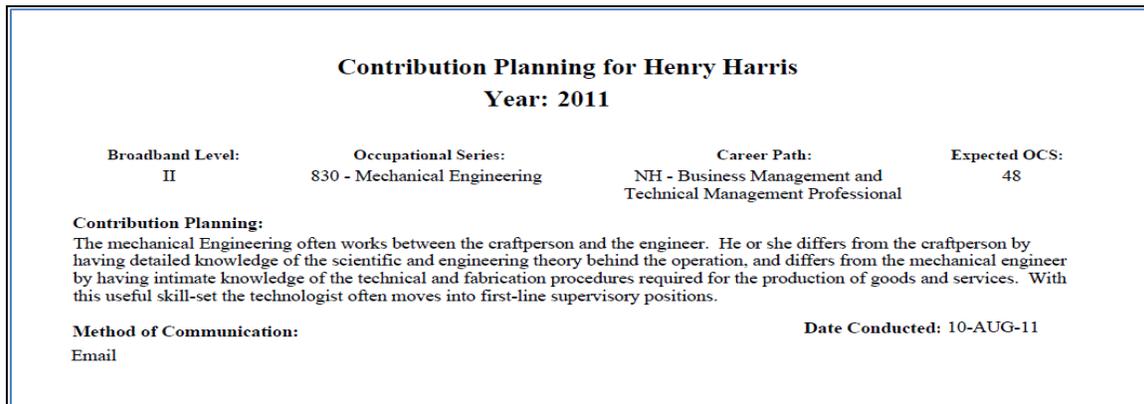


Figure 11-2 : Employee Contribution Planning Report

11.1.2 *Additional Feedback*

- From the CAS2Net employee report menu, select Additional Feedback (only when provided).
- CAS2Net displays Additional Feedback report (see figure: Sample Additional Feedback Report).

| Additional Feedback for Henry Harris | | | |
|--|---|--|---------------------------------|
| As of 07/14/11 10:37 | | | |
| 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. | | | |
| 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: Email | | | Date Conducted: 07/11/11 |

Figure 11-3: Employee Additional Feedback Report

11.1.3 Annual Appraisal Self-Assessment

- From the CAS2Net employee reports menu, select Annual Appraisal Self-Assessment (only when provided).
- CAS2Net displays Annual Appraisal Self-Assessment report (see figure: Sample Annual Appraisal Self-Assessment Report).

| Annual Appraisal Self-Assessment 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. | | | |
| Problem Solving | | | |
| test for henry's self assessment problem solving | | | |
| Teamwork/Cooperation | | | |
| Customer Relations | | | |
| Leadership/Supervision | | | |
| Communication | | | |
| test for henry, communication, self assessment | | | |
| Resource Management | | | |

Figure 11-4: Annual Appraisal Self-Assessment Report

11.1.4 Appraisal Form Parts II and III – Single Employee

- From the CAS2Net employee reports menu, select Appraisal Form Parts II and III – Single Employee.
- CAS2Net displays Appraisal Form Part II and III – By Employee screen.
- CAS2Net displays CCAS Salary Appraisal Document report in two parts: Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figure: Sample Appraisal Form Parts II and III – Single Employee, Part II and figure: Sample Appraisal Form Parts II and III – Single Employee, Part III).

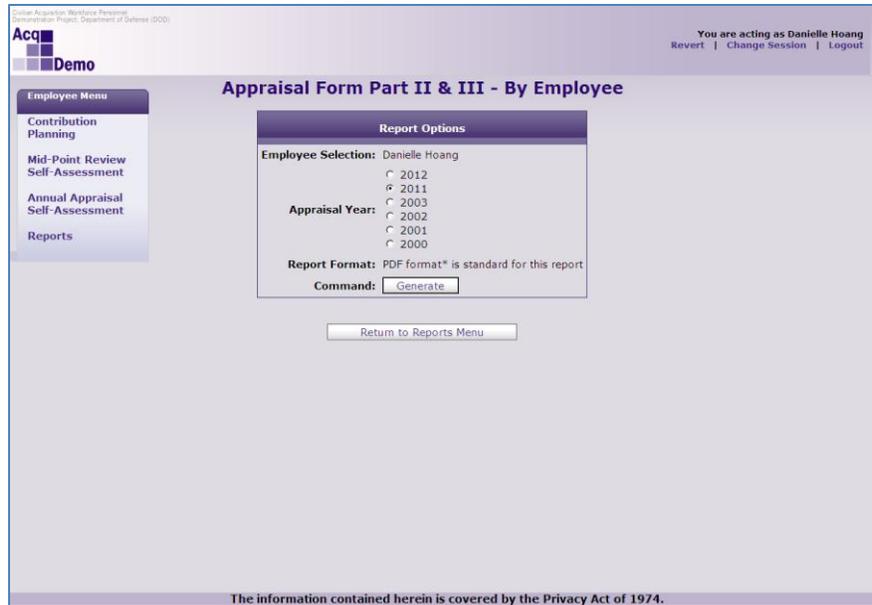


Figure 11-5: Appraisal Form Part II and III – By Employee Selection

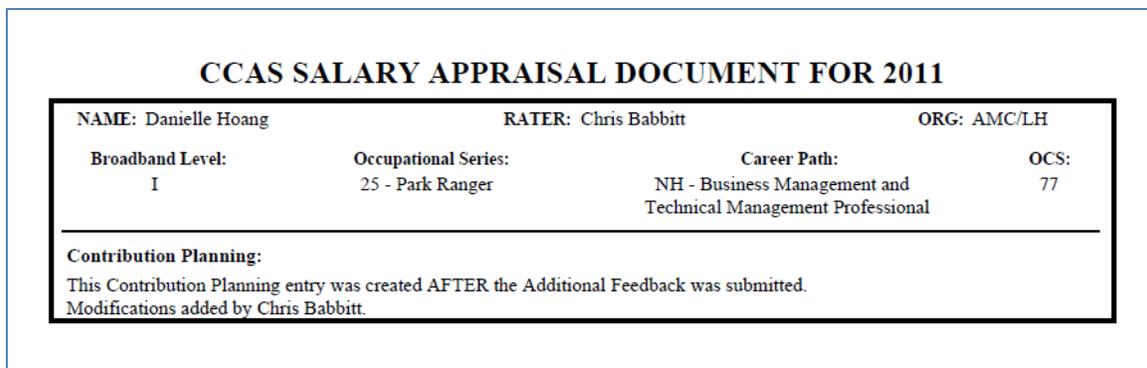


Figure 11-6: Appraisal Form Part II and III – By Employee, Contribution Planning

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | | |
|---|--|---|-----------------------|
| NAME: Danielle Hoang | | RATER: Chris Babbitt | ORG: AMC/LH |
| Broadband Level: I | Occupational Series: 25 - Park Ranger | Career Path: NH - Business Management and Technical Management Professional | OCS: 77 |
| 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 problem solving assessment. | 4L | 81 | |
| Teamwork/Cooperation teamwork and cooperation assessment. Additional teamwork evaluation. More comments added. | 3M | 73 | |
| Customer Relations customer relations assessment. additional comments for customer relations. | 3M | 73 | |
| Leadership/Supervision leadership and supervision assessment. | 4M | 87 | |
| Communication Communications assessment. | 3M | 68 | |
| Resource Management resource management assessment. | 3M | 77 | |

Figure 11-7: Appraisal Form Part II and III – By Employee, Part II

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | | |
|--|--|---|-------------|
| NAME: Danielle Hoang | | RATER: Chris Babbitt | ORG: AMC/LH |
| Broadband Level: I | Occupational Series: 25 - Park Ranger | Career Path: NH - Business Management and Technical Management Professional | OCS: 77 |
| 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 11-8: Appraisal Form Part II and III – By Employee, Part III

11.1.5 Mid-Point Review Self-Assessment

- From the CAS2Net employee reports menu, select Mid-Point Review Self-Assessment (only when provided).
- CAS2Net displays the Mid-Point Review Self-Assessment report (see figure: Sample Mid-Point Review Self-Assessment Report).

| Mid-Point Review Self-Assessment for Adam Appleton | | | |
|---|--|--|----------------------------|
| Year: 2012 | | | |
| Broadband Level: III | Occupational Series: 1550 - Computer Science | Career Path: NH - Business Management and Technical Management Professional | Expected OCS: 70 |
| Contribution Planning: Here is the employee input to start the plan. | | | |
| Overall Employee Self-Assessment: I have met all performance objectives for the current year. | | | |
| Problem Solving My problem solving capabilities have helped me perform my work. | | | |
| Teamwork/Cooperation | | | |
| Customer Relations | | | |
| Leadership/Supervision | | | |
| Communication | | | |
| Resource Management | | | |

Figure 11-9: 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: Sample Mid-Point Review Report – Single Employee).

The screenshot shows the CAS2NET interface for the 'Mid-Point Review - Single Employee' screen. The page title is 'Mid-Point Review - Single Employee'. On the left, there is an 'Employee Menu' with options: Contribution Planning, Mid-Point Review Self-Assessment, Annual Appraisal Self-Assessment, and Reports. The 'Mid-Point Review Self-Assessment' option is selected. The main content area is titled 'Report Options' and contains the following fields: 'Employee Selection' with a dropdown menu showing 'AMC/LH Ulanov, U', 'Appraisal Year' with radio buttons for '2012' (selected) and '2011', and 'Report Format' with the text 'PDF format* is standard for this report'. Below these fields is a 'Command:' label and a 'Generate' button. At the bottom of the main content area is a 'Return to Reports Menu' button. The footer of the page contains the text: 'The information contained herein is covered by the Privacy Act of 1974.'

Figure 11-10: 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 11-11: Mid-Point Review 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.

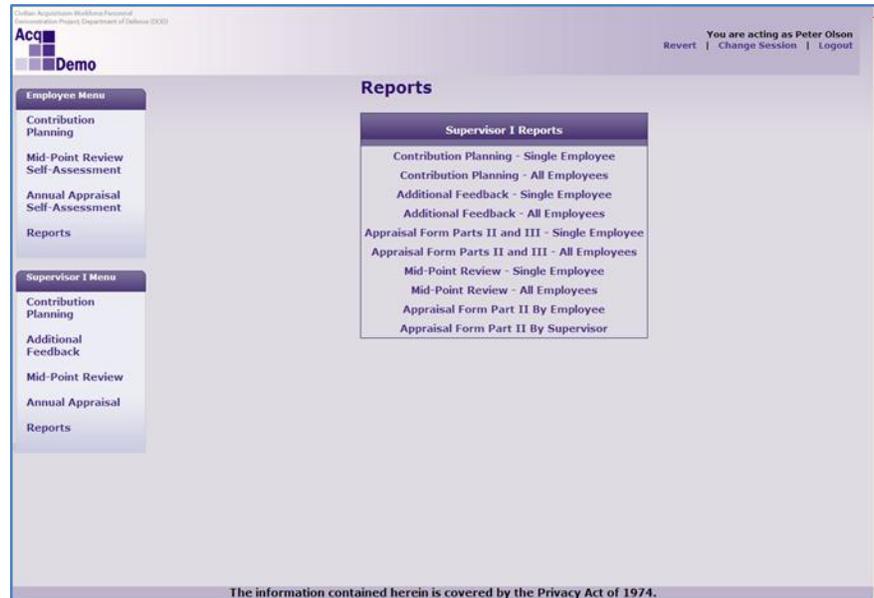


Figure 11-12: Supervisor Reports Menu

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: Sample 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: Sample Contribution Planning Report – Single Employee)

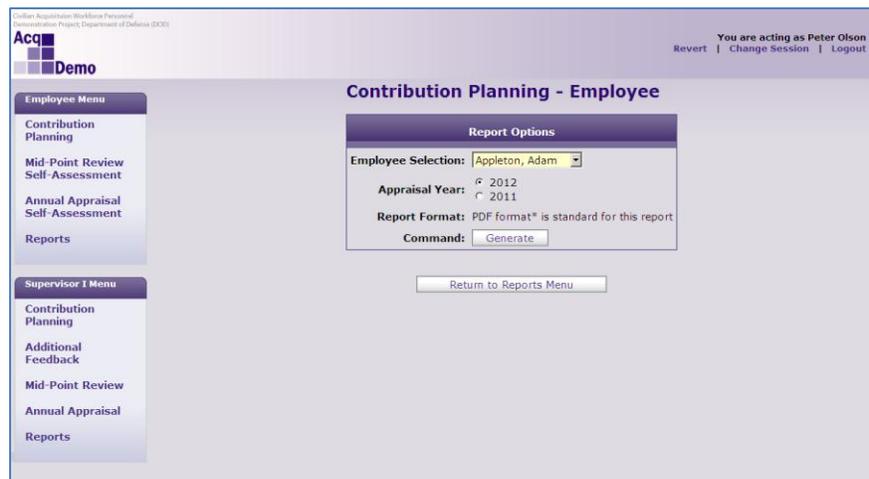


Figure 11-13: Contribution Planning Report – Single Employee Selection

| 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 11-14: 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: Sample Contribution Planning Report – Single Employee for example).

Figure 11-15: 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).

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

Acq Demo

You are acting as Peter Olson
Revert | Change Session | Logout

Additional Feedback - Employee

Report Options

Employee Selection: Appleton, Adam

Appraisal Year: 2012
2011

Report Format: PDF format* is standard for this report

Command: Generate

Return to Reports Menu

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

Figure 11-16: Additional Feedback Report – Single Employee Selection

| Additional Feedback for Henry Harris | | | |
|---|---|--|----------------------------|
| As of 07/14/11 10:37 | | | |
| 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. | | | |
| 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: Email | | Date Conducted: 07/11/11 | |

Figure 11-17: Additional Feedback Report – Single Employee

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).



Figure 11-18: Additional Feedback Report - All Employees Selection

11.2.5 Appraisal Form Parts II and III – Single Employee

- From the Supervisor Reports menu, select Appraisal Form Parts II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts 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 two parts: Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figure: Sample Appraisal Form Parts II and III – Single Employee, Part II and figure: Sample Appraisal Form Parts II and III – Single Employee, Part III).

Figure 11-19: Appraisal Form Parts II and III – Single Employee Selection

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | | |
|---|--|---|------------|
| NAME: Danielle Hoang | RATER: Chris Babbitt | ORG: AMC/LH | |
| Broadband Level: I | Occupational Series: 25 - Park Ranger | Career Path: NH - Business Management and Technical Management Professional | OCS: 77 |
| Contribution Planning: This Contribution Planning entry was created AFTER the Additional Feedback was submitted. Modifications added by Chris Babbitt. | | | |

Figure 11-20: Appraisal Form Parts II and III – Single Employee, Contribution Planning

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | | |
|---|---|--|-----------------------|
| NAME: Danielle Hoang | | RATER: Chris Babbitt | |
| ORG: AMC/LH | | | |
| Broadband Level: I | Occupational Series: 25 - Park Ranger | Career Path: NH - Business Management and Technical Management Professional | OCS: 77 |
| 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 | 4L | 81 | |
| problem solving assessment. | | | |
| Teamwork/Cooperation | 3M | 73 | |
| teamwork and cooperation assessment. Additional teamwork evaluation. More comments added. | | | |
| Customer Relations | 3M | 73 | |
| customer relations assessment. additional comments for customer relations. | | | |
| Leadership/Supervision | 4M | 87 | |
| leadership and supervision assessment. | | | |
| Communication | 3M | 68 | |
| Communications assessment. | | | |
| Resource Management | 3M | 77 | |
| resource management assessment. | | | |

Figure 11-21: Appraisal Form Parts II and III – Single Employee, Part II

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | | |
|--|---|--|-------------------|
| NAME: Danielle Hoang | | RATER: Chris Babbitt | |
| ORG: AMC/LH | | | |
| Broadband Level: I | Occupational Series: 25 - Park Ranger | Career Path: NH - Business Management and Technical Management Professional | OCS: 77 |
| 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 11-22: Appraisal Form Parts II and III – Single Employee, Part III

11.2.6 Appraisal Form Parts II and III – All Employees

- From the Supervisor Reports menu, select Appraisal Form Parts II and III – All Employees.
- CAS2Net displays Appraisal Form Parts II and III screen (see figure: Sample Appraisal Form Parts 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 figure: Sample Appraisal Form Parts II and III – Single Employee, Part II and figure: Sample Appraisal Form Parts II and III – Single Employee, Part III for example).

The screenshot displays the 'Appraisal Form Part II & III - By Supervisor' interface. On the left is a 'Paypool Manager Menu' with options like Contribution Planning, Additional Feedback, Mid-Point Review, Annual Appraisal, Sub-Panel Meeting, Reports, and Appraisal Status. The main area features a 'Report Options' dialog box with the following settings: Selection Type: All Paypool Supervisors; Supervisor Selection: AMC/LH Arnold, Bob; Supervisor Type: First Level Supervisor (selected); Assessment Year: 2012 (selected); Report Format: PDF format* is standard for this report. A 'Generate' button is at the bottom of the dialog, and a 'Return to Reports Menu' button is below it. The top right corner indicates 'You are acting as Bob Arnold' with links for Revert, Change Session, and Logout. A footer note states 'The information contained herein is covered by the Privacy Act of 1974.'

Figure 11-23: Appraisal Form Parts II and III – All Employees Selection

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

CCAS SALARY APPRAISAL DOCUMENT

Supervisor of group: Bob Arnold

Supervisor Role: First Level Supervisor

Criteria:

| | |
|------------------|------------------------|
| Supervisor: | Bob Arnold |
| Supervisor Role: | First Level Supervisor |
| Appraisals Year: | 2012 |

Figure 11-24: Annual Appraisal Report Parts 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).

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

Acq
Demo

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

Mid-Point Review - Single Employee

Report Options

Employee Selection: Ulanov, Uli

Appraisal Year: 2012 2011

Report Format: PDF format* is standard for this report

Command:

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

Figure 11-25: Mid-Point Review Report – Single Employee Selection

Mid-Point Review for Uli Ulanov
As of 03/14/12 11:11

| | | | |
|-------------------------------|--|---|----------------------------|
| Gradeband Level: II | Organizational Series: 334 - Computer Specialist | Career Path: NH - Business Management and Technical Management Professional | Expected OCS: 45 |
|-------------------------------|--|---|----------------------------|

Contribution Planning:
Achieve best performance

dk

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

| | | | |
|-------------------------------|--|---|----------------------------|
| Gradeband Level: II | Organizational Series: 334 - Computer Specialist | Career Path: NH - Business Management and Technical Management Professional | Expected OCS: 45 |
|-------------------------------|--|---|----------------------------|

| |
|----------------------------|
| Resource Management |
|----------------------------|

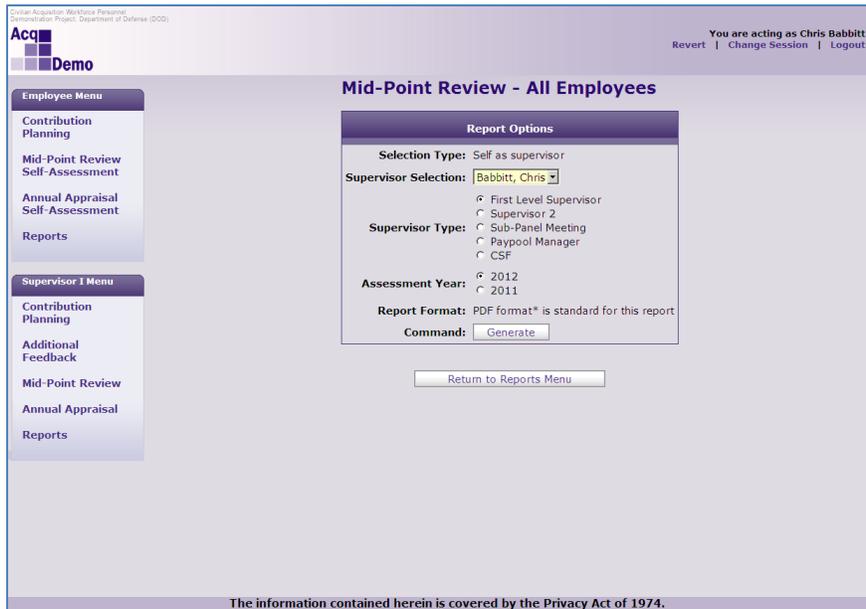
Method of Communication: TeleConference **Date Conducted:** 03/02/12

Figure 11-26: 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: Sample Mid-Point Review Report – Single Employee for example).



Civilian Acquisition Workforce Personnel
Modernization Project, Department of Defense (DDO)

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
- Reports

Supervisor I Menu

- Contribution Planning
- Additional Feedback
- Mid-Point Review
- Annual Appraisal
- Reports

Mid-Point Review - All Employees

Report Options

Selection Type: Self as supervisor

Supervisor Selection: Babbitt, Chris

Supervisor Type:

- First Level Supervisor
- Supervisor 2
- Sub-Panel Meeting
- Paypool Manager
- CSF

Assessment Year:

- 2012
- 2011

Report Format: PDF format* is standard for this report

Command:

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

Figure 11-27: Mid-Point Review Report - All Employees Selection

11.2.9 Appraisal Form Part II by Employee

Generates a report presenting an employee’s appraisal form which details their categorical and numerical score per factor including comments.

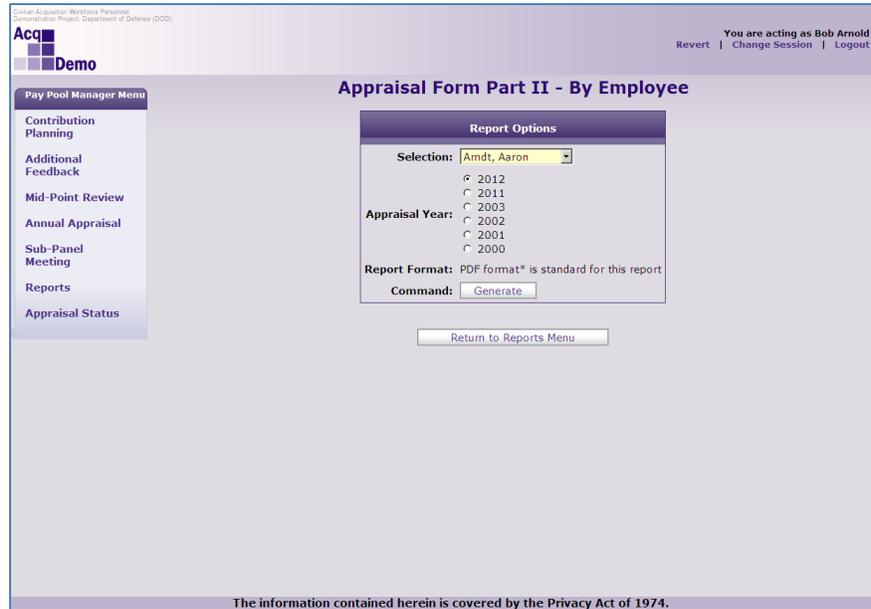


Figure 11-28: Appraisal Form Part II by Employee Report Selection

| CCAS SALARY APPRAISAL DOCUMENT FOR 2011 | | |
|---|---------------------------|-----------------------|
| NAME: Danielle Hoang | ORGANIZATION: AMC/LH | |
| RATER: Chris Babbitt | OCS: 77 | |
| 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 problem solving assessment. | 4L | 81 |
| Teamwork/Cooperation teamwork and cooperation assessment. Additional teamwork evaluation. More comments added. | 3M | 73 |
| Customer Relations customer relations assessment. additional comments for customer relations. | 3M | 73 |
| Leadership/Supervision leadership and supervision assessment. | 4M | 87 |
| Communication Communications assessment. | 3M | 68 |
| Resource Management resource management assessment. | 3M | 77 |

Figure 11-29: Appraisal Form Part II by Employee Report

11.2.10 *Appraisal Form Part II by Supervisor*

- From the Supervisor Reports menu, select Appraisal Form Part II By Supervisor.
- CAS2Net displays Appraisal Form Part II – By Supervisor screen.

Figure 11-30: Appraisal Form Part II by Supervisor Report 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).
- Select the appraisal year and click “Generate”.
- CAS2Net generates the CCAS Salary Appraisal Document For [Assessment Year] report for all employees:
 - 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 “Part II – Supervisor Assessment” for all employees.”.

(Note: By Supervisor report format is the same as By Employee format.)

CCAS SALARY APPRAISAL DOCUMENT FOR 2011

CCAS SALARY APPRAISAL DOCUMENT

Supervisor of group: Chris Babbitt

Supervisor Role: First Level Supervisor

Criteria: Supervisor: Chris Babbitt
 Supervisor Role: First Level Supervisor
 Appraisals Year: 2011

Figure 11-31: Appraisal Form Part II by Supervisor, Cover Page

CCAS SALARY APPRAISAL DOCUMENT FOR 2011

| | | |
|---|---------------------------|-----------------------|
| NAME: Danielle Hoang | ORGANIZATION: AMC/LH | |
| RATER: Chris Babbitt | OCS: 77 | |
| 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 problem solving assessment. | 4L | 81 |
| Teamwork/Cooperation teamwork and cooperation assessment. Additional teamwork evaluation. More comments added. | 3M | 73 |
| Customer Relations customer relations assessment. additional comments for customer relations. | 3M | 73 |
| Leadership/Supervision leadership and supervision assessment. | 4M | 87 |
| Communication Communications assessment. | 3M | 68 |
| Resource Management resource management assessment. | 3M | 77 |

Figure 11-32: Appraisal Form Part II by Supervisor Report

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:

- CAS2Net Status Report & Excel Spreadsheet
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor
- Zone A/CIP Report

Note. Section 11.2 Supervisor Reports details employee assessment reports available to all supervisors.

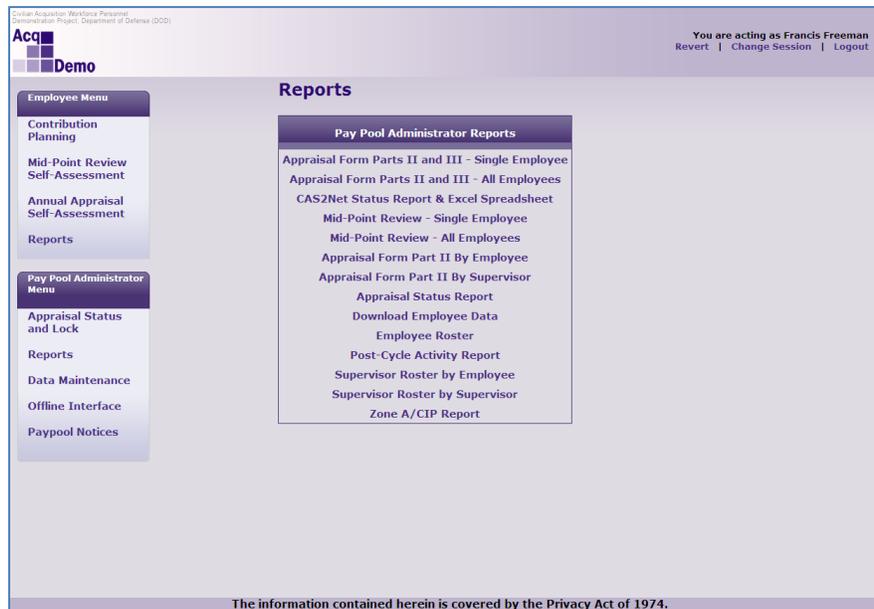


Figure 11-33: Pay Pool Administrator Reports Menu

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.

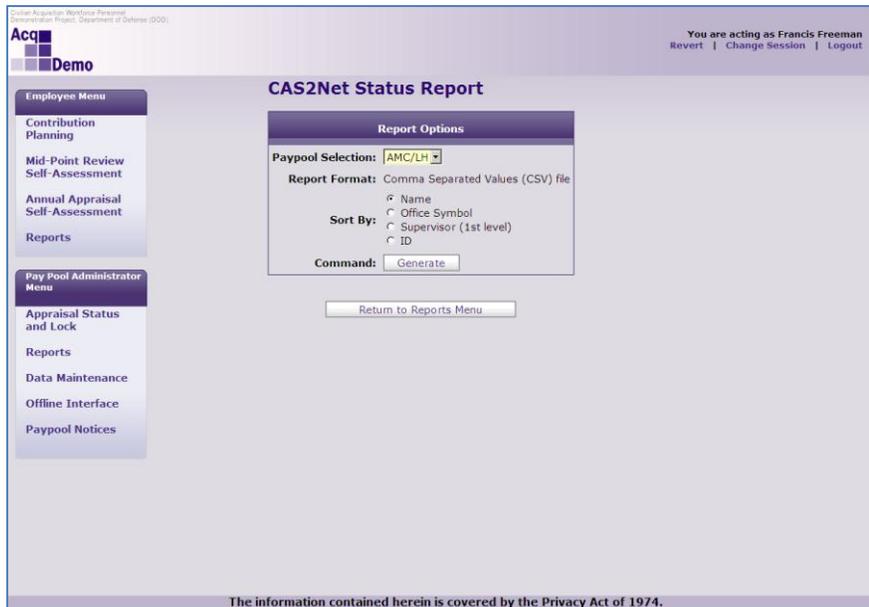


Figure 11-34: CAS2Net Status Report Selection

| 1 | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|---------|------------|---------|-----------|-----------------|-----------------|------------|--------|----------|--------|---------|-----------|---|
| 2 | Paypool | AMC/LH | As Of: | 28-Sep-12 | | | | | | | | | |
| | | Last | First | Office | | | AcqDemo | CP Emp | CP Supv | Mid- | Self | Annual | |
| 3 | Emp ID | Name | Name | Symbol | Supervisor | Sub-Panel Mgr | Start Date | Input | Approval | Point | Assessm | Appraisal | |
| 3 | 2612 | Appleton | Adam | | Helen Gonzalez | Sam Battista | 1-Jan-11 | Y | Y | Review | ent | Y | Y |
| 4 | 43 | Arndt | Aaron | AMC/LHXT | Helen Gonzalez | Nancy Michelson | 1-Feb-99 | Y | 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 | Cavasos | 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 11-35: CAS2Net Status Report

11.3.2 Appraisal Status Report

Presents the status of appraisals within a pay pool.

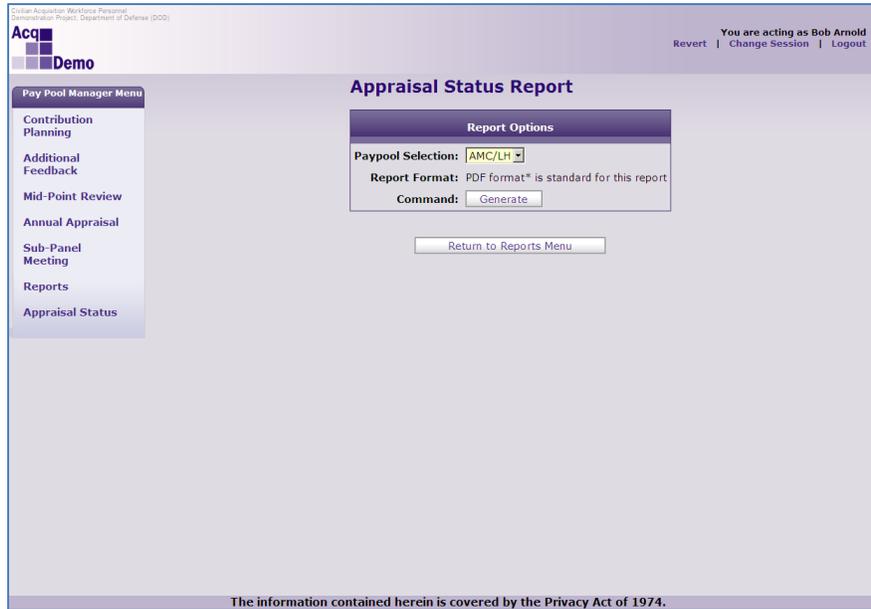


Figure 11-36: Appraisal Status Report Selection

| Paypool | Personnel Count | Assigned PPM | Appraisals Completed | Pct Complete | Target | | Funding | | Finalize? | |
|----------------|-----------------|--------------|----------------------|--------------|--------|-----|---------|----|-----------|----------|
| | | | | | CRI | CA | CRI | CA | Can? | Did? |
| AMC/LH | 49 | 46 | 44 | 89.8% | SPL | SPL | 2 | 1 | | |
| 1 PP's: | 49 | 46 | 44 | 89.8% | | | | | 0 | 0 |

Figure 11-37: Appraisal Status Report

11.3.3 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 | Irinski | 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 11-38: Download Employee Data – Excel Worksheet

11.3.4 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.

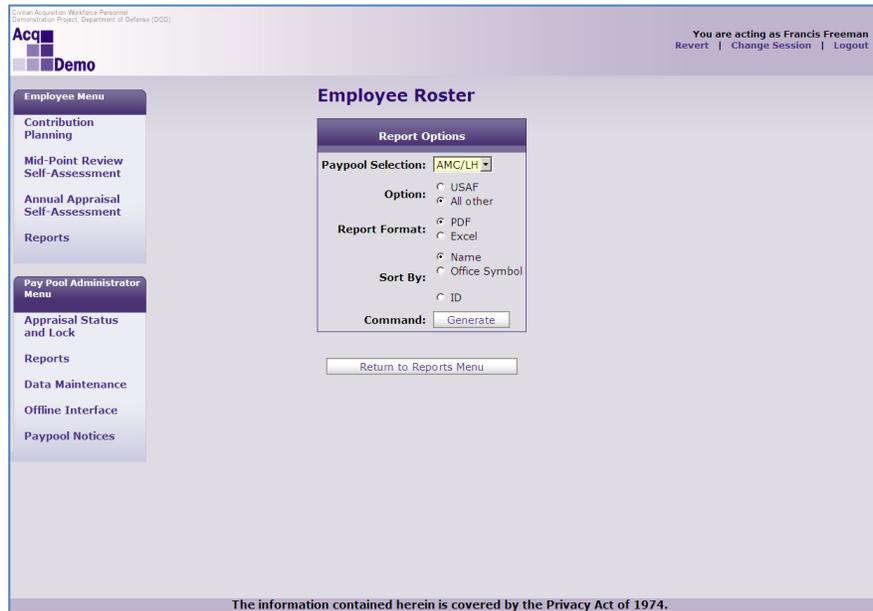


Figure 11-39: Employee Roster Report Selection

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.

Acq Demo
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 | Ciroum (recently) | 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 | Ciroum (recently) | 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 11-40: Employee Roster Report

11.3.5 Post Cycle Activity Report

Produces a list of employees based on leavers, joiners, temporary promotions, permanent promotions, and demotions.

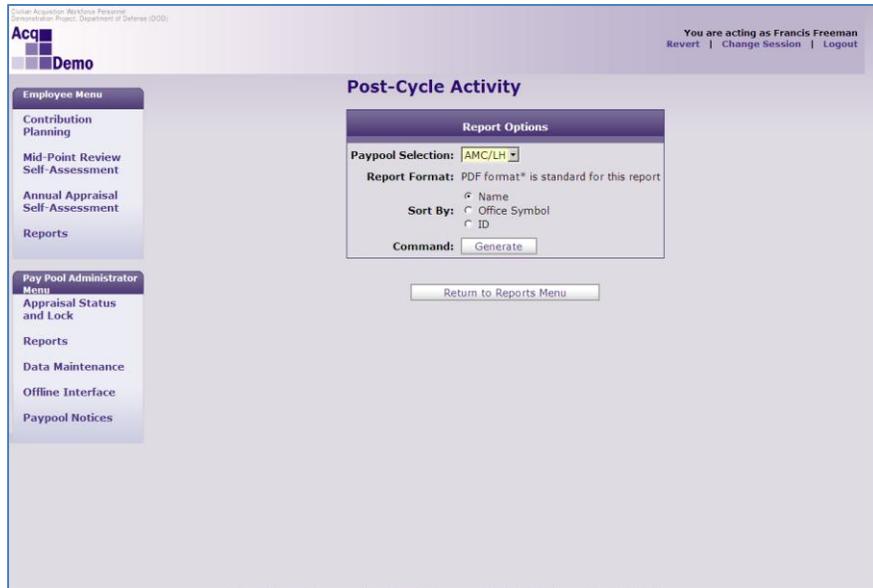


Figure 11-41: Post Cycle Activity Report Selection

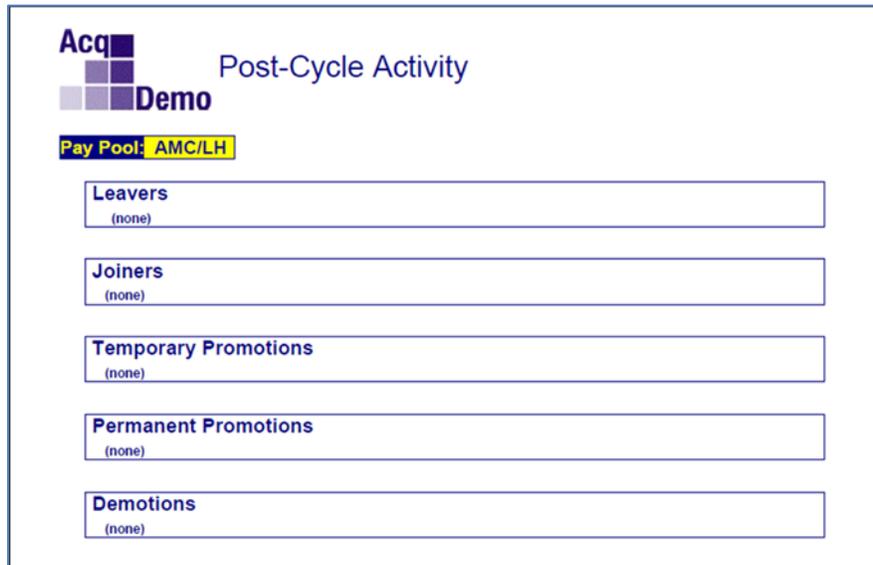


Figure 11-42: Post Cycle Activity Report

11.3.6 Supervisor Roster by Employee Report

Presents a list of employees and their supervisor.

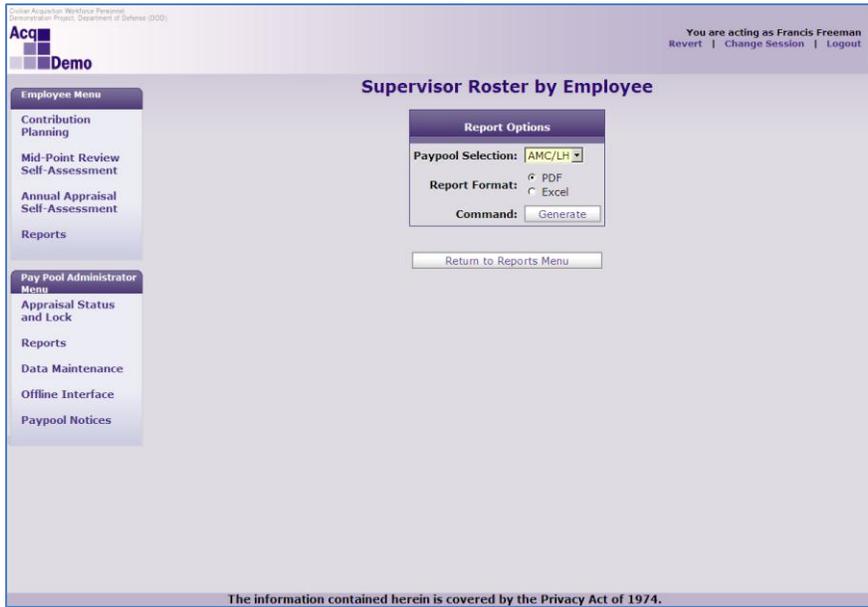


Figure 11-43: Supervisor Roster by Employee Report Selection



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

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Figure 11-44: Supervisor Roster by Employee Report

11.3.7 Supervisor Roster by Supervisor Report

Presents a list of a supervisor breakdown by supervisors, listing their employees.



Figure 11-45: 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, Vinoent , 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 Jemis, 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 Zurbriggen, Zack , AMC/LHXTA |
| | | Ike Hansen | Cavasos, Carmen , AMC/LHXTB Dancy, Dyanne , AMC/LHXTB Emerson, Erica , AMC/LHXTB |

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Figure 11-46: Supervisor Roster by Supervisor Report

11.3.8 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.

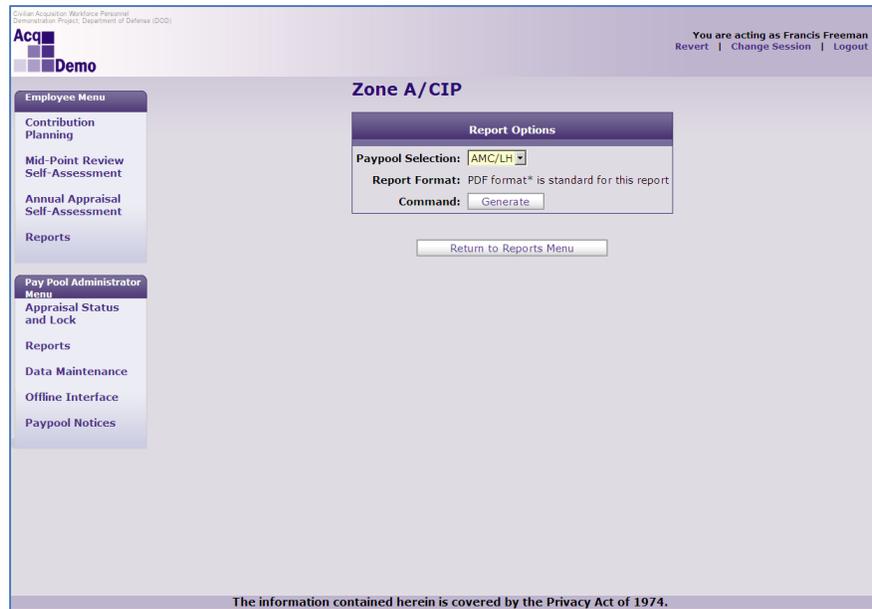


Figure 11-47: Zone A/CIP Report Selection

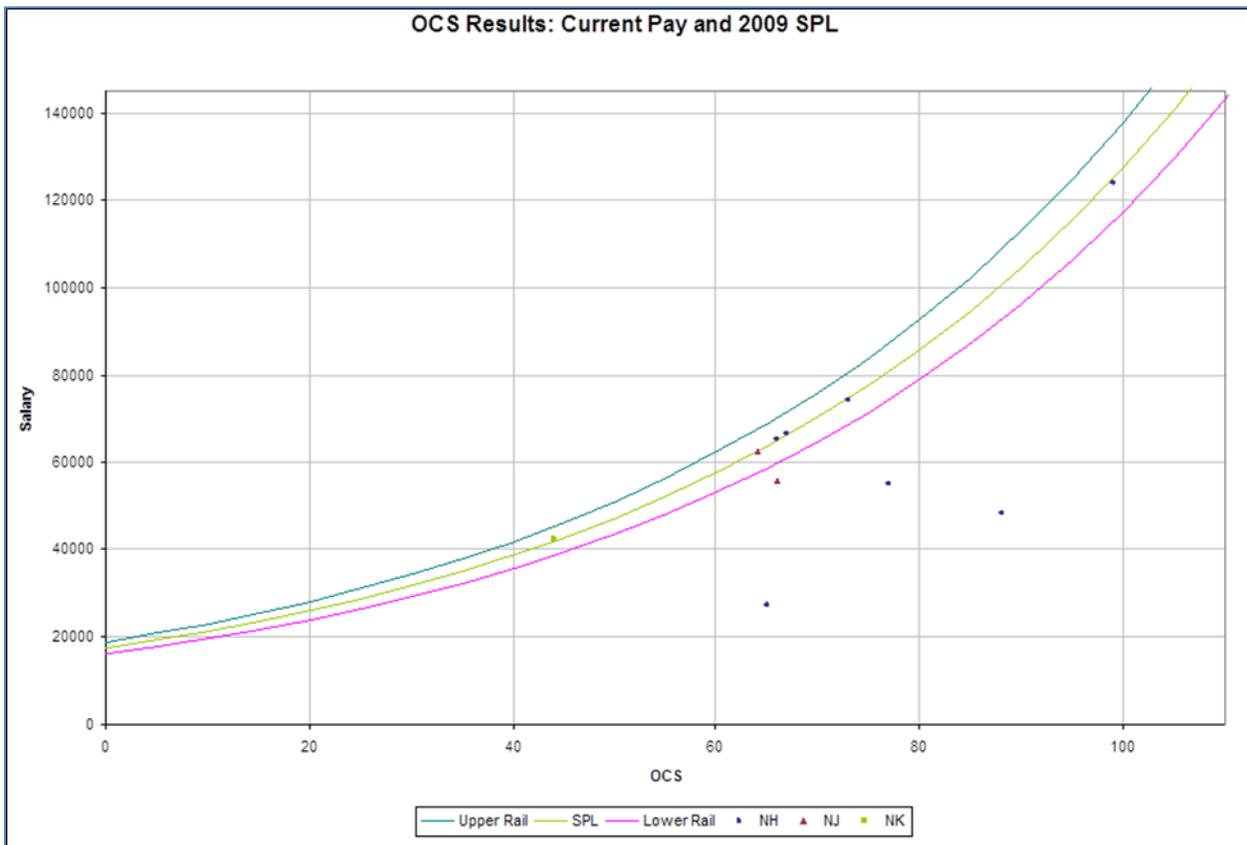


Figure 11-48: Zone A/CIP Report