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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 appraisal cycle. The Contribution Planning module encourages collaboration between employees and supervisors to refine the contribution plan. Additional Feedback and Mid-Point Review modules promote continuous communication and performance improvement. Closeout Assessments review employee performance in the event of a change in assignment or rating official. 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 contribution factors and appraisals. CAS2NET supports the Level 1 Supervisor's ability to create and modify contribution 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 CMS, upload data from CMS, and make supervisory assignments for employees, the review of the contribution ratings of employees for fair consideration.
10.0	Superuser, Full Access User	This section provides guidance for the Superuser (or Full Access User) to perform the data administration functions described in section 9.0. It includes instructions for changing role to assume an assigned CAS2NET role to execute their designated responsibility.
11.0	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 contribution-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 appraisal cycle, while the Contribution Planning module encourages collaboration between employees and supervisors to refine the contribution plan. Additional Feedback and Mid-Point Review modules will promote continuous communication and performance improvement, as Closeout Assessments and the Annual Appraisal modules enable employees and supervisors to provide evaluations based on their respective viewpoints. The reward activities consist of the Pay Pool Panel review and reconciliation of the Level 1 Supervisors' evaluations and the generation of the employee salary increase, award and bonus.

2.2 Who Should Use This Guide?

The CAS2NET User Guide is for Employees, Level 1 Supervisors, Level 2 Supervisors, Sub-Panel Managers, Pay Pool Managers, Pay Pool Administrators and Superusers 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: ▪ Collaborating with the Level 1 Supervisor to set contribution objectives. ▪ 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: ▪ Setting contribution objectives, 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: ▪ 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: ▪ 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: ▪ Managing the CCAS payouts, Contribution Rating Increases (CRI) and Contribution Awards (CA) 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: ▪ 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: ▪ 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

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

- Both Internet Explorer and Netscape support changing the font size of the text on a web 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 **+** (plus sign) to make the text larger or **-** (minus sign) to make the text smaller.
- Movement from page to page can be very quick or very slow, depending on the amount of traffic and the length and speed of the path the traffic must travel. It is possible for information packets to get "lost" in transmission, so if you click on a link and nothing happens for several minutes, click the "Stop" button on your browser and try the link again.
- If you click on a link and there is a long delay, you might get an error message something like "the file contains no data". This could be due to your connection being so slow that your browser "times out". If this happens, try the link again. If the problem persists contact AcqDemo Support Offices.

3. CAS2NET USER SESSION

3.1 User Login and Role Based Menu

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

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

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

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

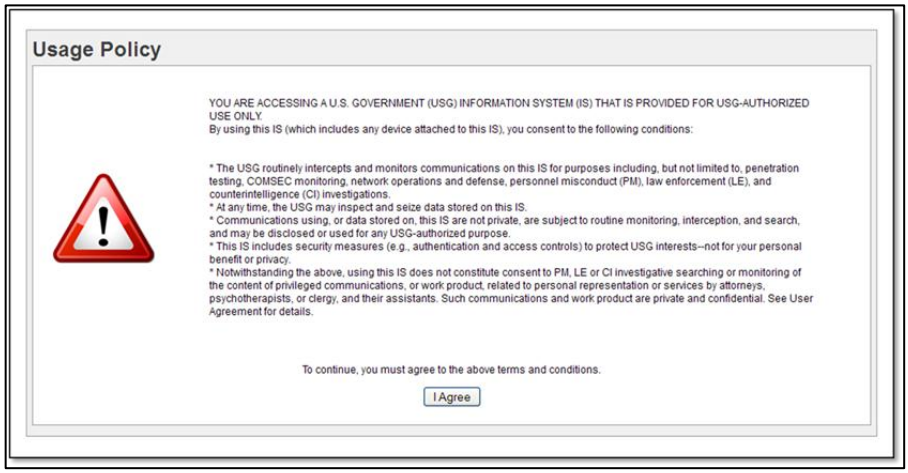

Figure 3-1: Usage Policy Screen

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

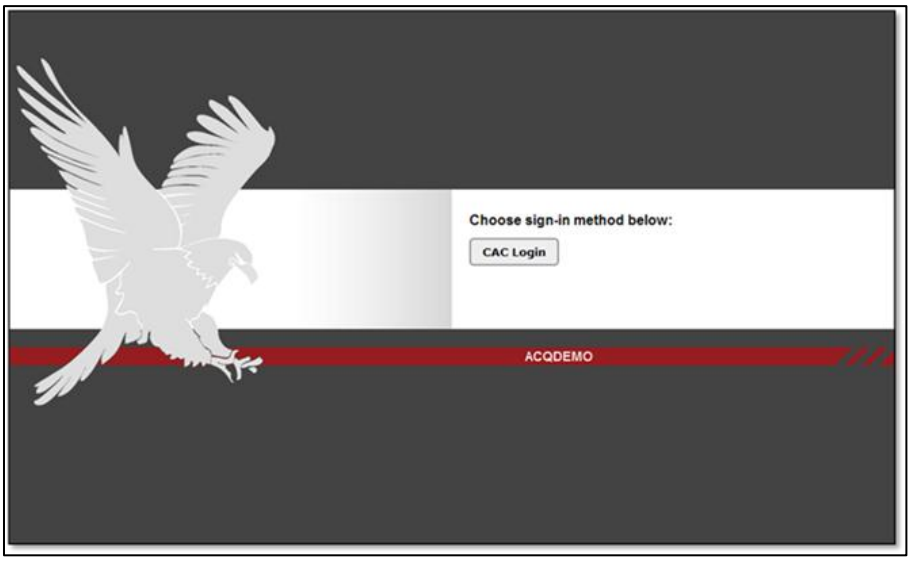

Figure 3-2: CAC Logo Screen

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

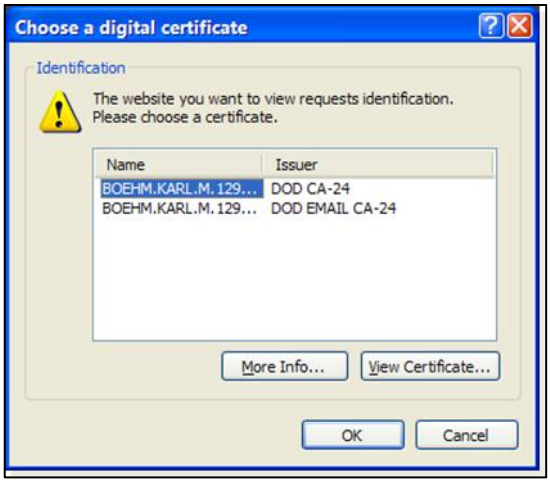

Figure 3-3: Digital Certification Selection Screen

If prompted, enter your CAC PIN.

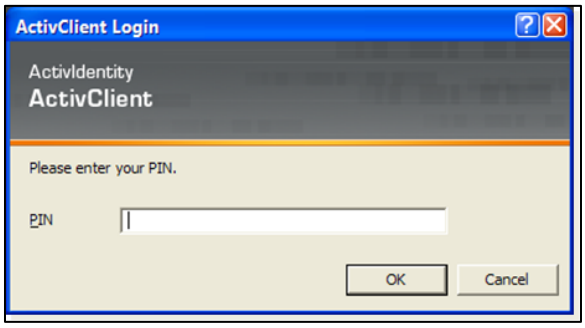

Figure 3-4: CAC Pin Entry Screen

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

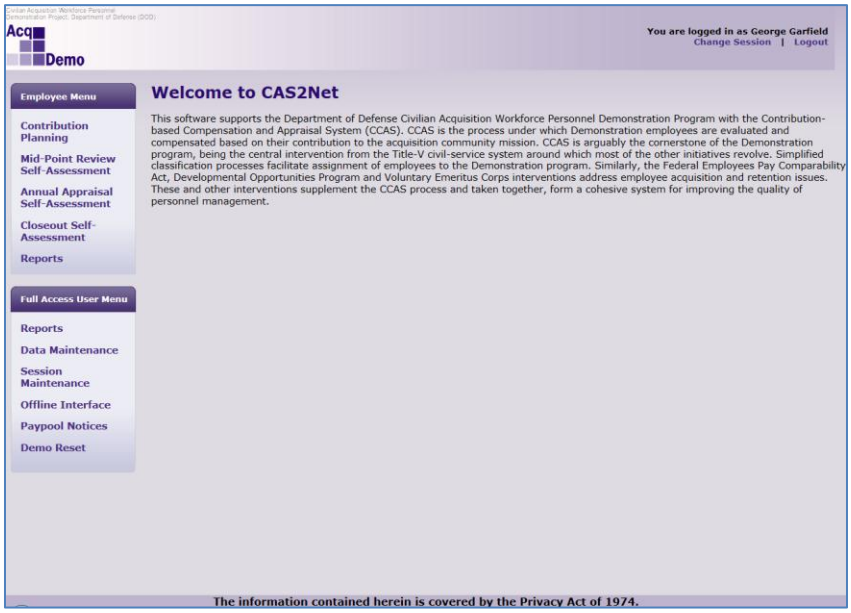

Figure 3-5: CAS2Net Welcome Screen

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

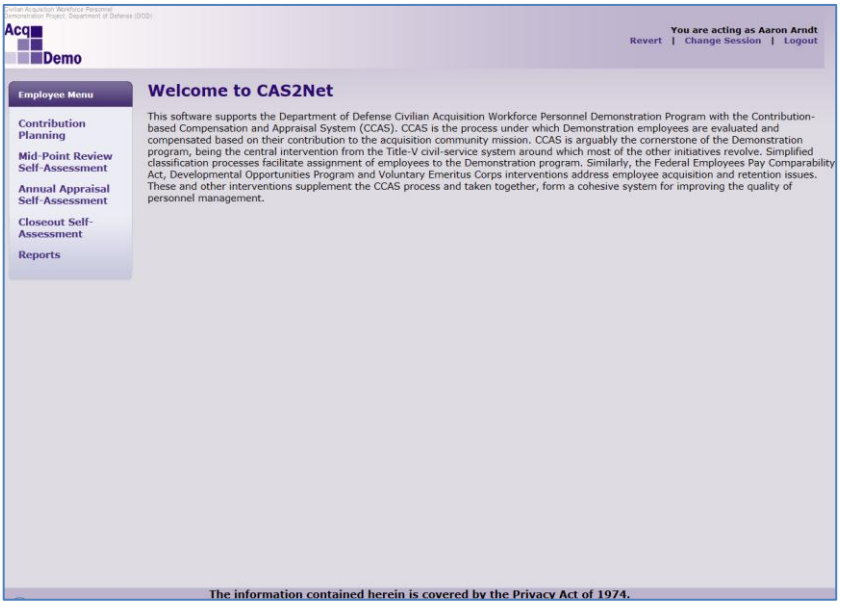

Figure 3-6: Employee Log In

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

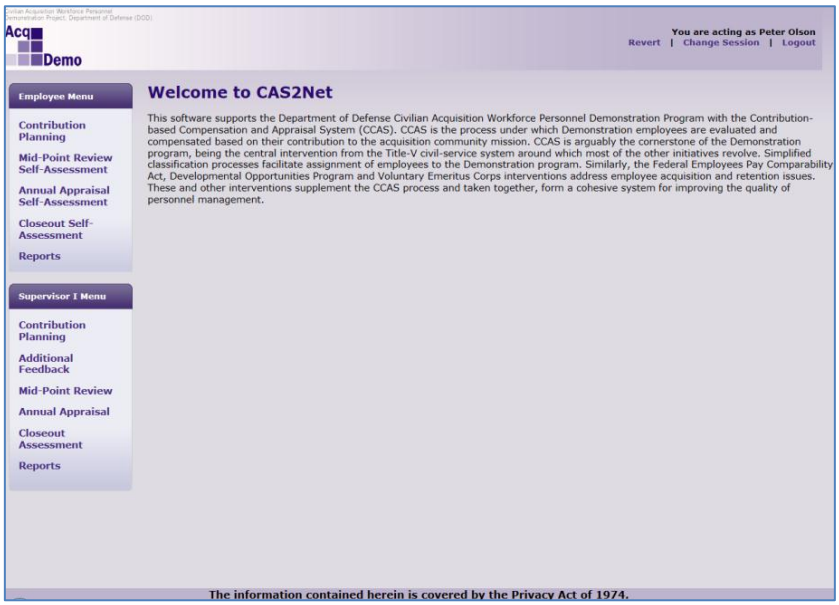

Figure 3-7: Level 1 Supervisor Log In (Supervisor is "Demo" Employee)

7. 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**, **Annual Appraisal**, and **Closeout Assessment**.

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

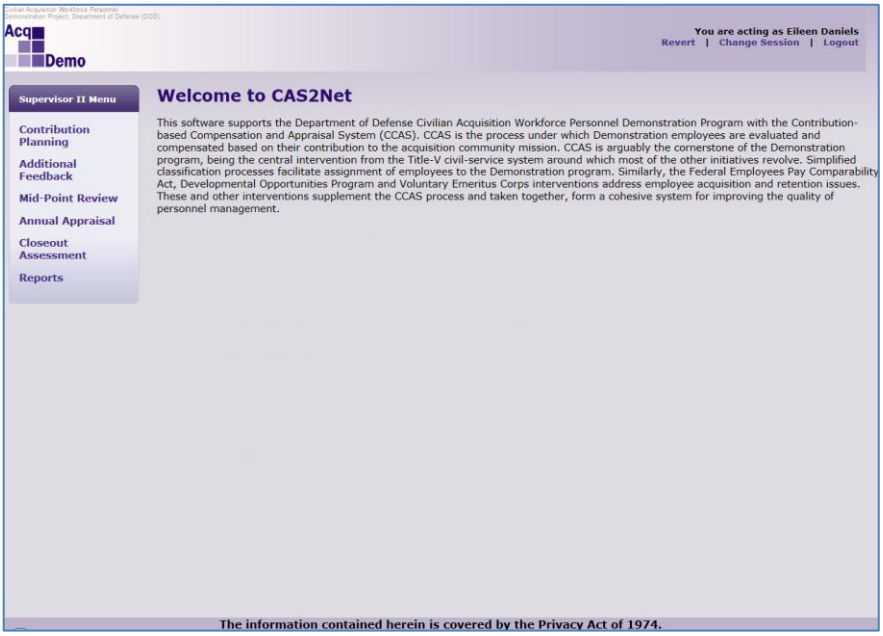

Figure 3-8: Level 2 Supervisor Log In (Supervisor Is Not "Demo" Employee)

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**, **Annual Appraisal**, and **Closeout Assessment**.

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

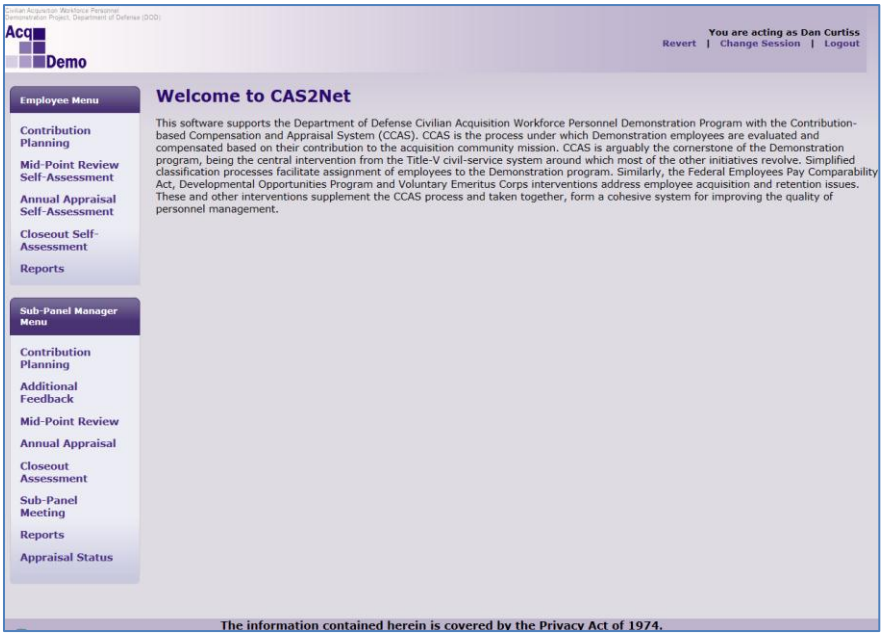

Figure 3-9: Sub-Panel Manager Log In (Manager Is "Demo" Employee)

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**, **Annual Appraisal**, and **Closeout Assessment**.

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

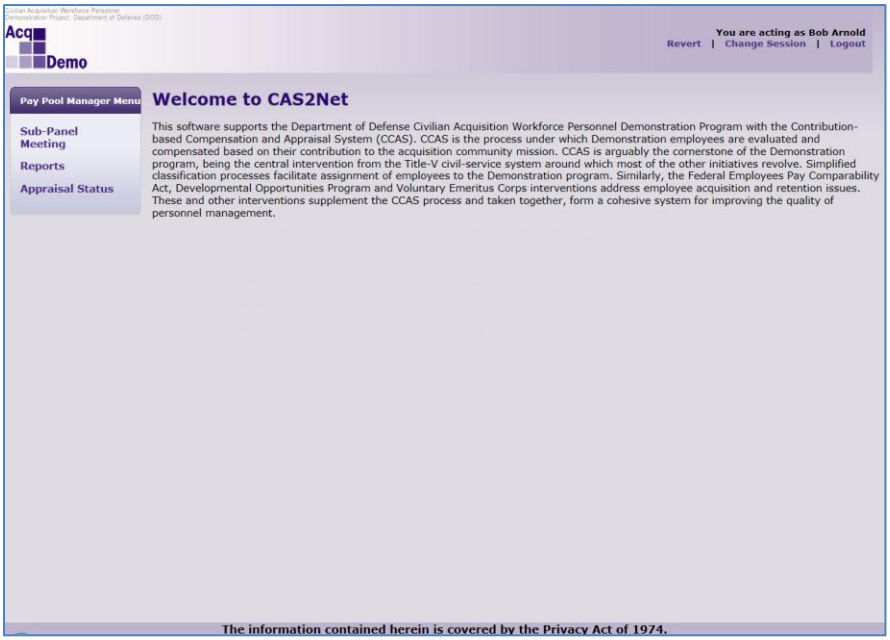

Figure 3-10: Pay Pool Manager Log In (Manager Is Not "Demo" Employee)

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**, **Annual Appraisal**, and **Closeout Assessment**.

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

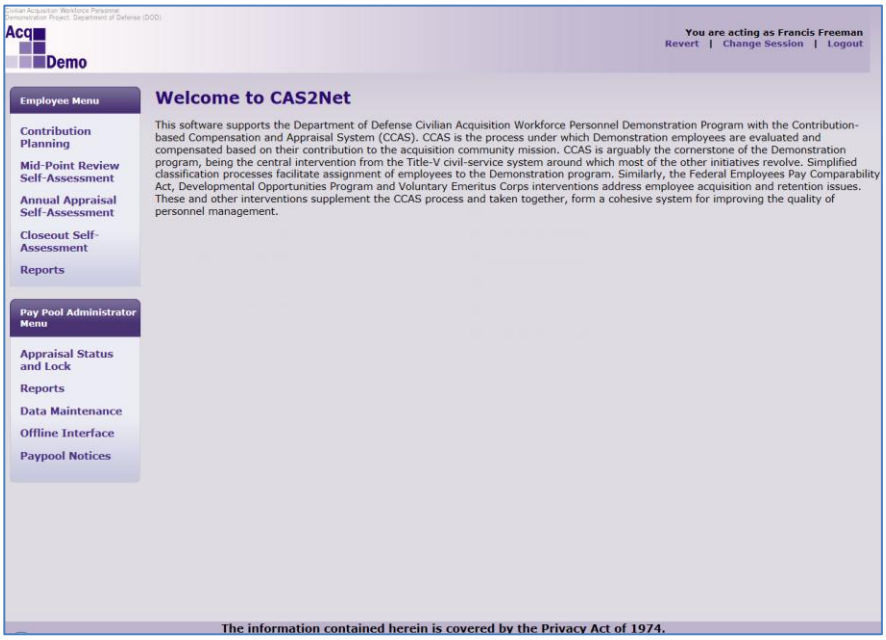

Figure 3-11: Pay Pool Administrator Log In (Administrator Is "Demo" Employee)

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**, **Annual Appraisal**, and **Closeout Assessment**.

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

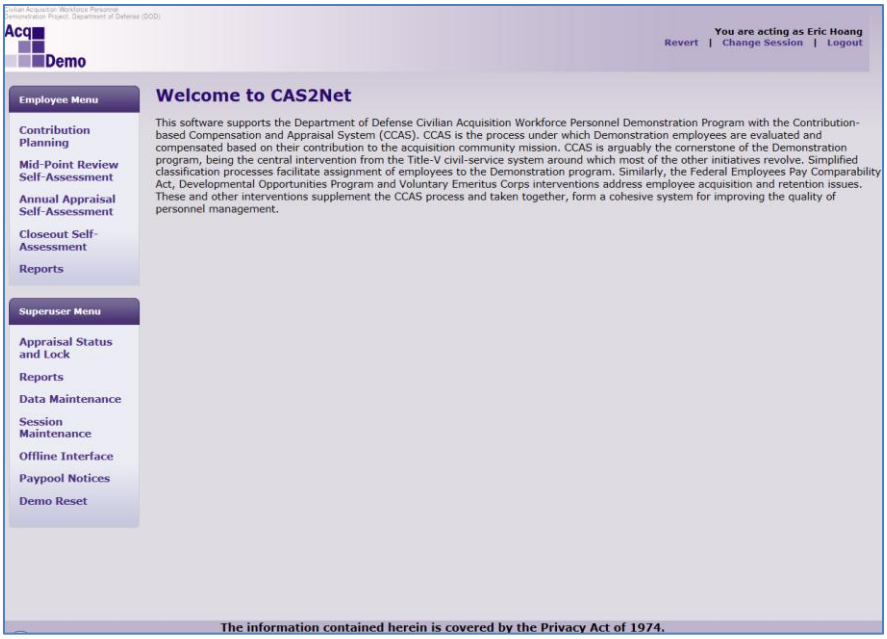

Figure 3-12: Superuser Log In (Superuser Is "Demo" Employee)

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

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

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

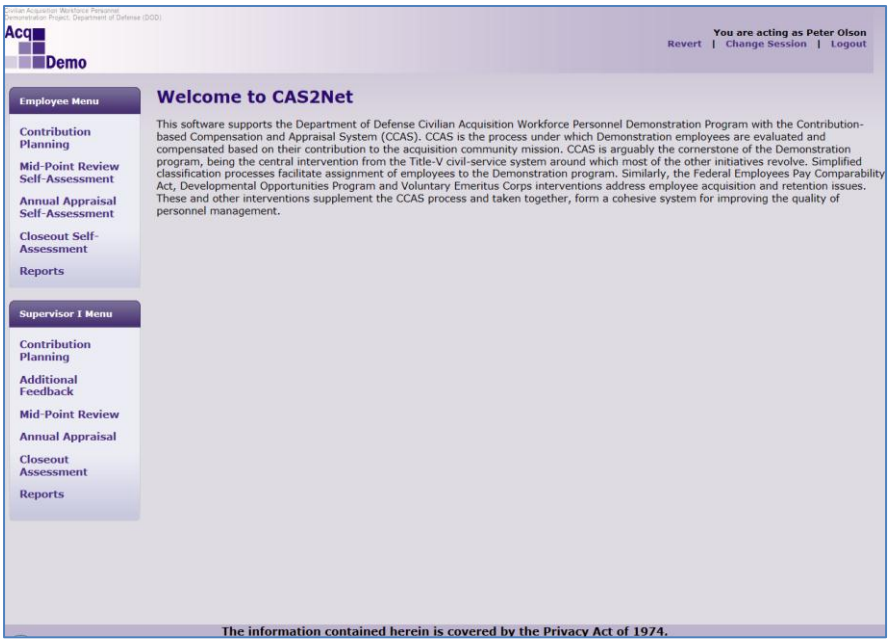

Figure 3-13: "Multiple Roles" Log In

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

Figure 3-14: "Multi-Pay Pool User" Log In

3.2 Logout

This section describes how the system users log out of CAS2Net 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."

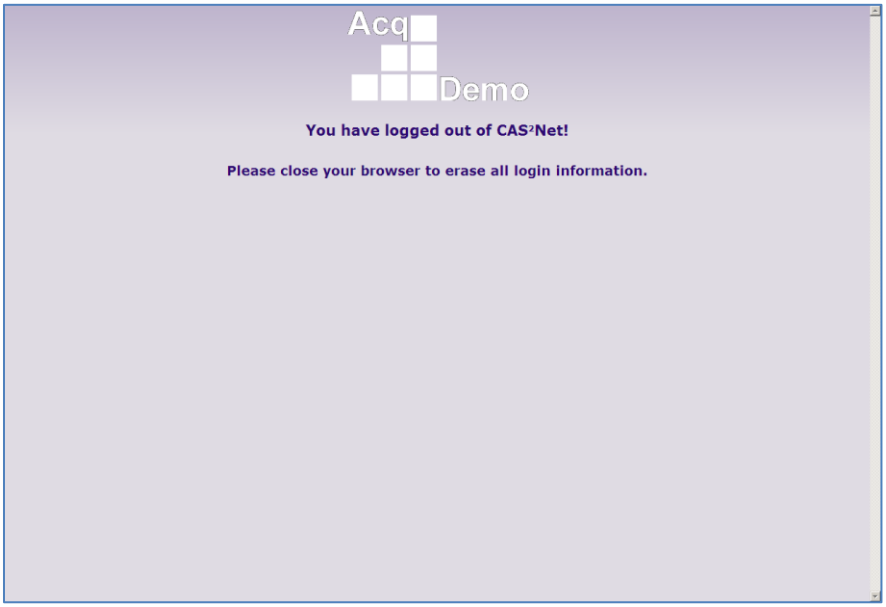

Figure 3-16: Log Out Message

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, Closeout and Annual Appraisal Self Assessments, Mid-Point Review, Additional Feedback, Closeout Assessment and Annual Appraisal. It does not apply to the assessments that are displayed as "read only".

FEATURE HIGHLIGHTS:

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

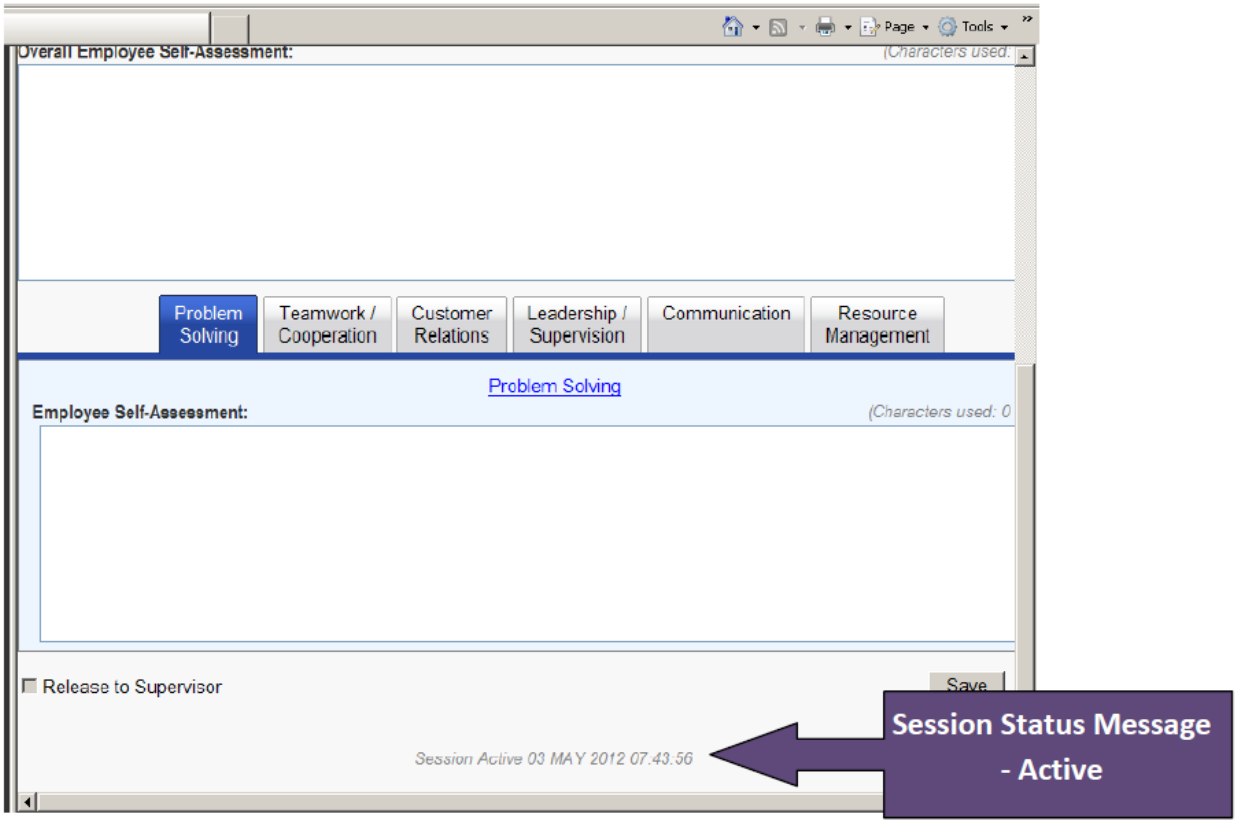

Figure 3-17: Session Status Message - Active

- 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.

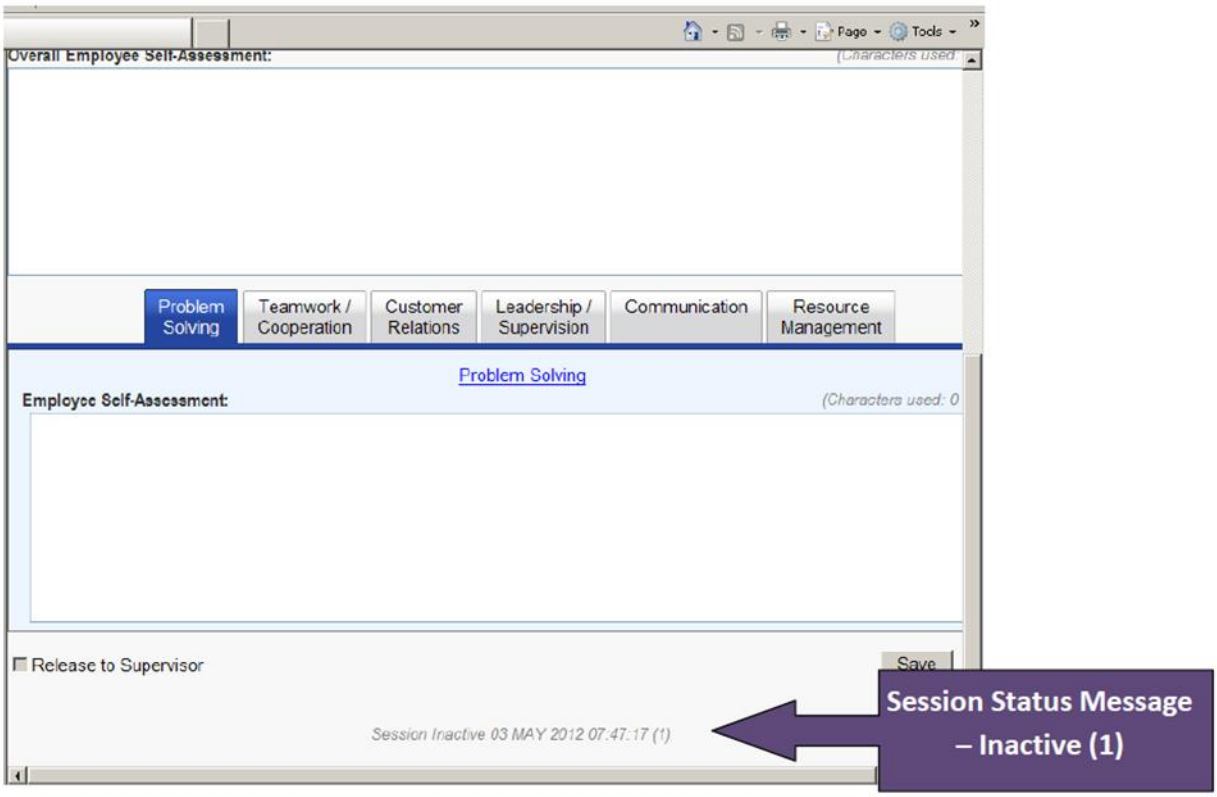

Figure 3-18: Session Status Message – Inactive (1)

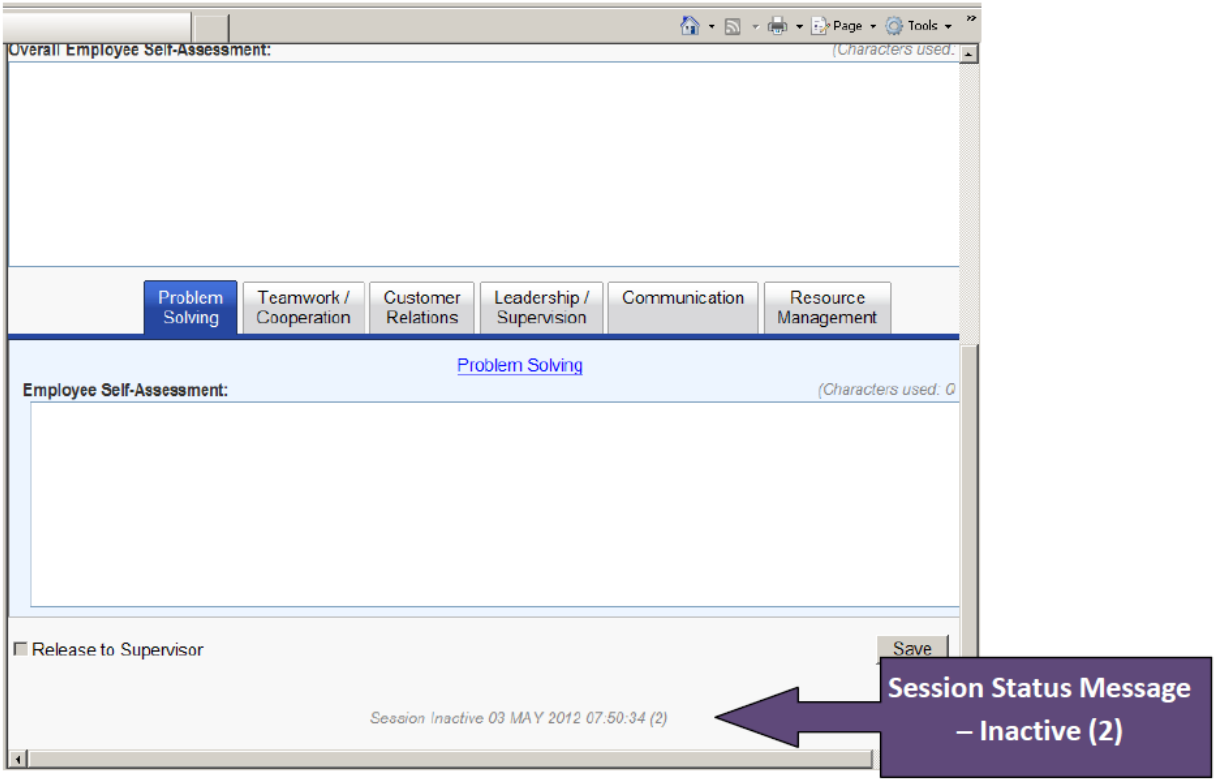

Figure 3-19: Session Status Message – Inactive (2)

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

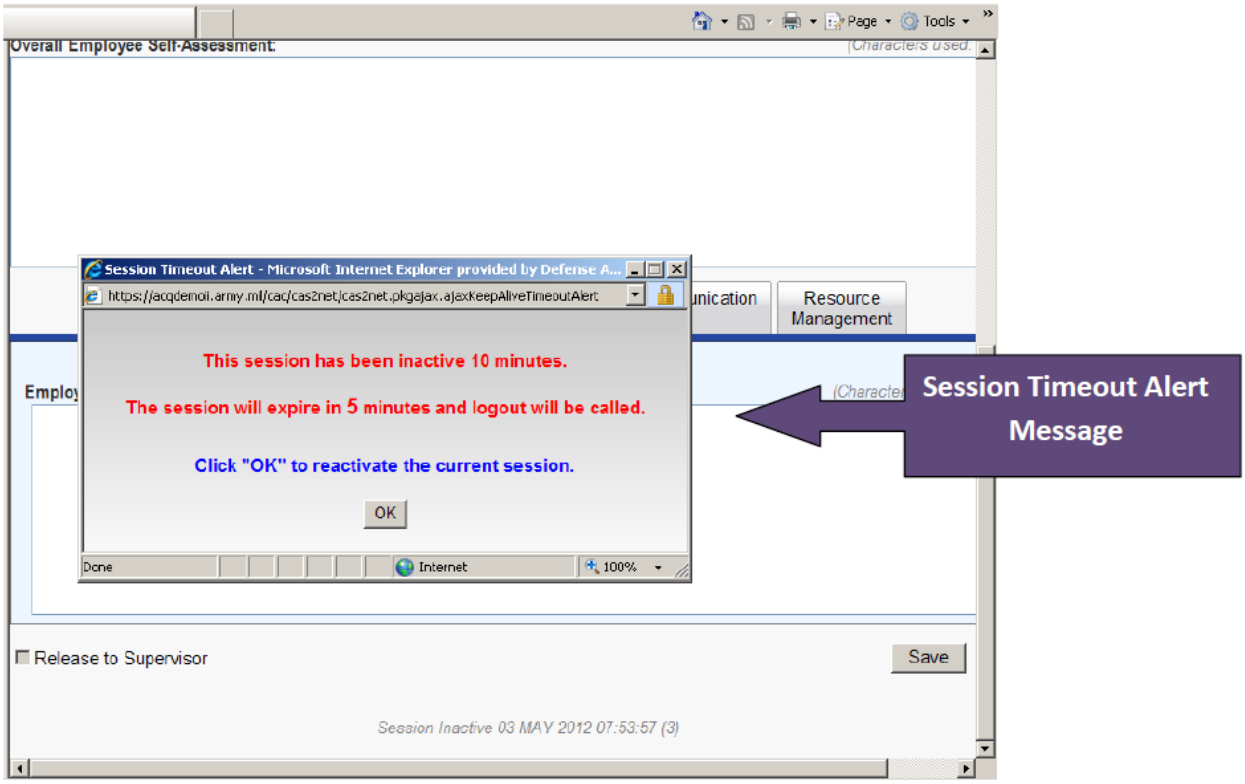

Figure 3-20: Session Timeout Alert Message

- 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.

3.4 Cycle Year Dropdown

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

CAS2Net's "current year" is the fiscal year of the active appraisal cycle. CAS2Net's "next year" is the following appraisal cycle fiscal year. Bounded by final year-end processes, CAS2Net's operating year generally aligns with the Gregorian calendar (*i.e.* January thru December).

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

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

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

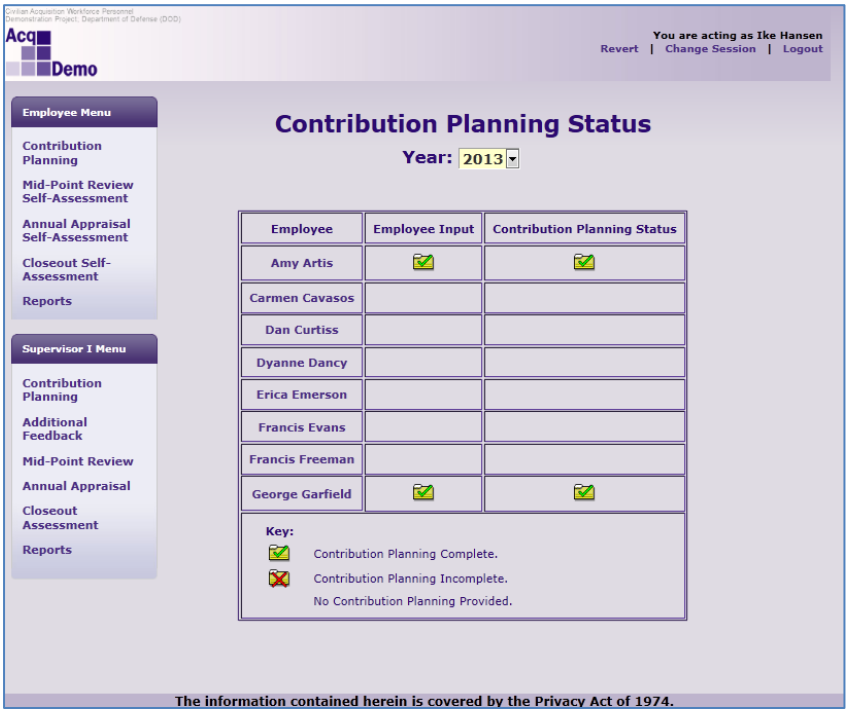

Figure 3-21: Assigned Employees for Selected "Year"

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

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

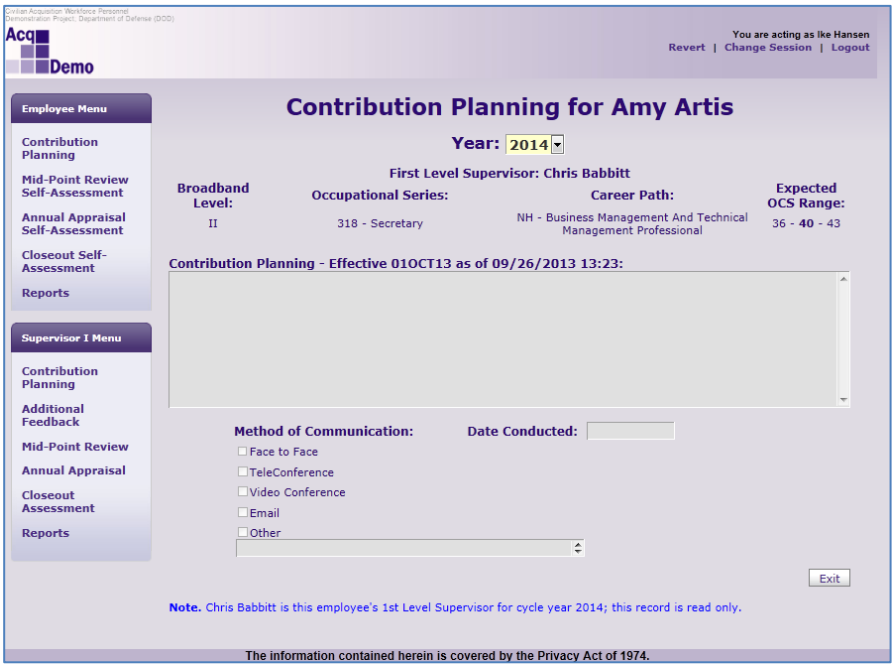

Figure 3-22: Unassigned Employee Record for Selected "Year"

3.5 Explanatory Notes

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

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

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

Figure 3-23: CAS2Net Explanatory Notes

CAS2Net Explanatory Notes include:

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

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

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

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

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

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

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

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

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

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

- Previous cycle records are read only.

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

- Reference links to prior records are read only.

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

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

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

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

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

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

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

- The supervisor has already closed the Closeout Assessment for this period; record is read only.

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

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

- The supervisor has already closed the Mid-Point Review for this cycle; this record is read only.

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

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

- The supervisor has posted the closing employee review date; this record is read only.

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

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

- This appraisal status is "locked"; content is read only.

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

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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 appraisal 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 contribution factor.
- **Closeout Self-Assessment** enables the employee to rate his contribution when he has a job or rating official change during the cycle.
- 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 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

Figure 4-1: Employee Contribution Planning Web Form

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

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

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

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

1) If the supervisor performs the Contribution Planning “Modify” feature, then CAS2Net generates a new working copy of Contribution Planning and accepts updates from either the supervisor or employee.
2) If “Employee Narrative Complete” is unchecked when Contribution Planning is finalized, then CAS2Net provides an “Employee Narrative Complete” button on the employee Contribution Planning web page to allow the employee to update the employee input status.

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 appraisal year. To accommodate appraisal 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 appraisal cycle.

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

Figure 4-2: “Next Cycle Year” Employee Contribution Planning Web Form

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

Notes.

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

   When the 6000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.

2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from submitting the date and method of communication signaling that the Contribution Planning is closed.

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

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

4.2 Mid-Point Review Self-Assessment

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

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

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

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

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

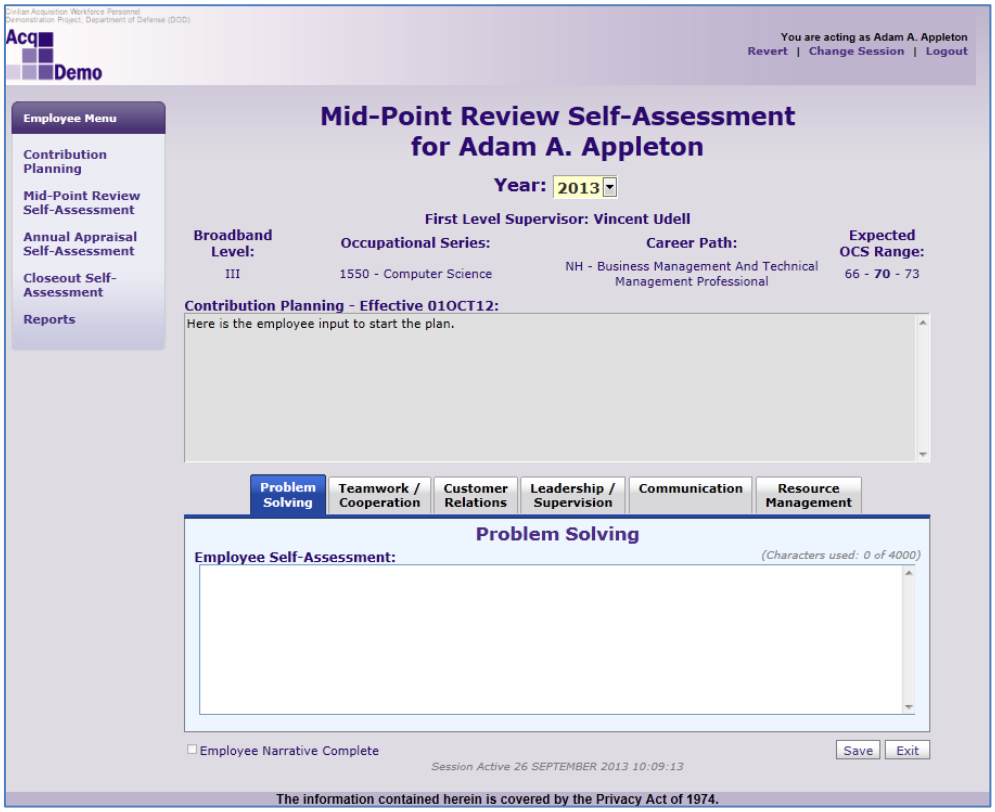


Figure 4-3: Mid-Point Review Self-Assessment Web Form

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

Notes.

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

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

2. "Employee Narrative Complete" is information only. CAS2Net does not enforce any business rules regarding the employee's "Employee Narrative Complete" state. Unchecking "Employee Narrative Complete" does not prevent the supervisor from locking the Mid-Point Review Self-Assessment.

3. The self-assessment page is displayed as "read only" when the supervisor has saved the Mid-Point Review with a checkmark in "Lock Employee Self-Assessment".

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

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

4.3 Annual Appraisal Self-Assessment

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

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

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

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

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

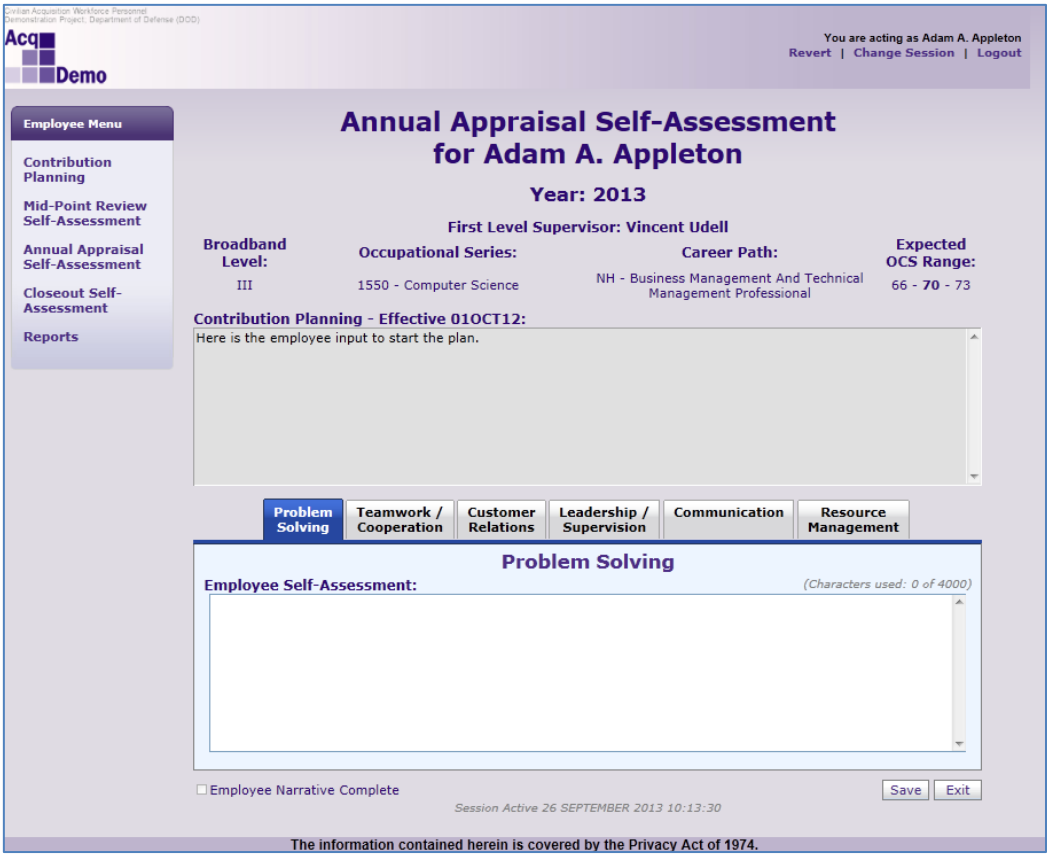


Figure 4-4: Annual Appraisal Self-Assessment Web Form

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

- Uncheck “Employee Narrative Complete” and click “Save” to revert the self-assessment status to “In Progress” indicating to the supervisor that you have additional input.

Notes.

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

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

2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from does not prevent the supervisor from locking the Annual Appraisal.

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

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

4.4 Closeout Self-Assessment

CAS2Net supports one or more Closeout Assessments for an employee during an appraisal cycle to evaluate employee contributions in the event of a change in position or rating official. Either the employee or the supervisor can initiate the Closeout process.

CLOSEOUT SELF-ASSESSMENT STATUS

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

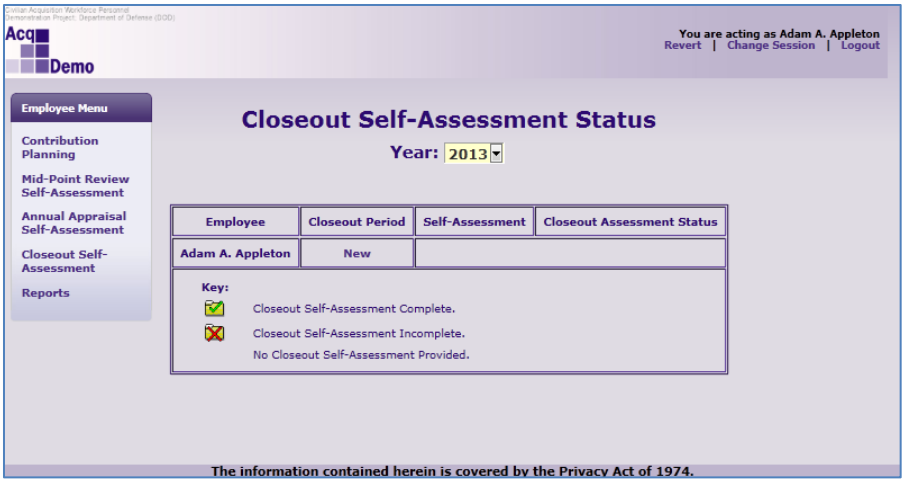


Figure 4-5: Employee Closeout Self-Assessment Status

CAS2Net lists Closeout details along with status columns:

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

CLOSEOUT SELF-ASSESSMENT WEB FORM

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

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

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

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

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

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

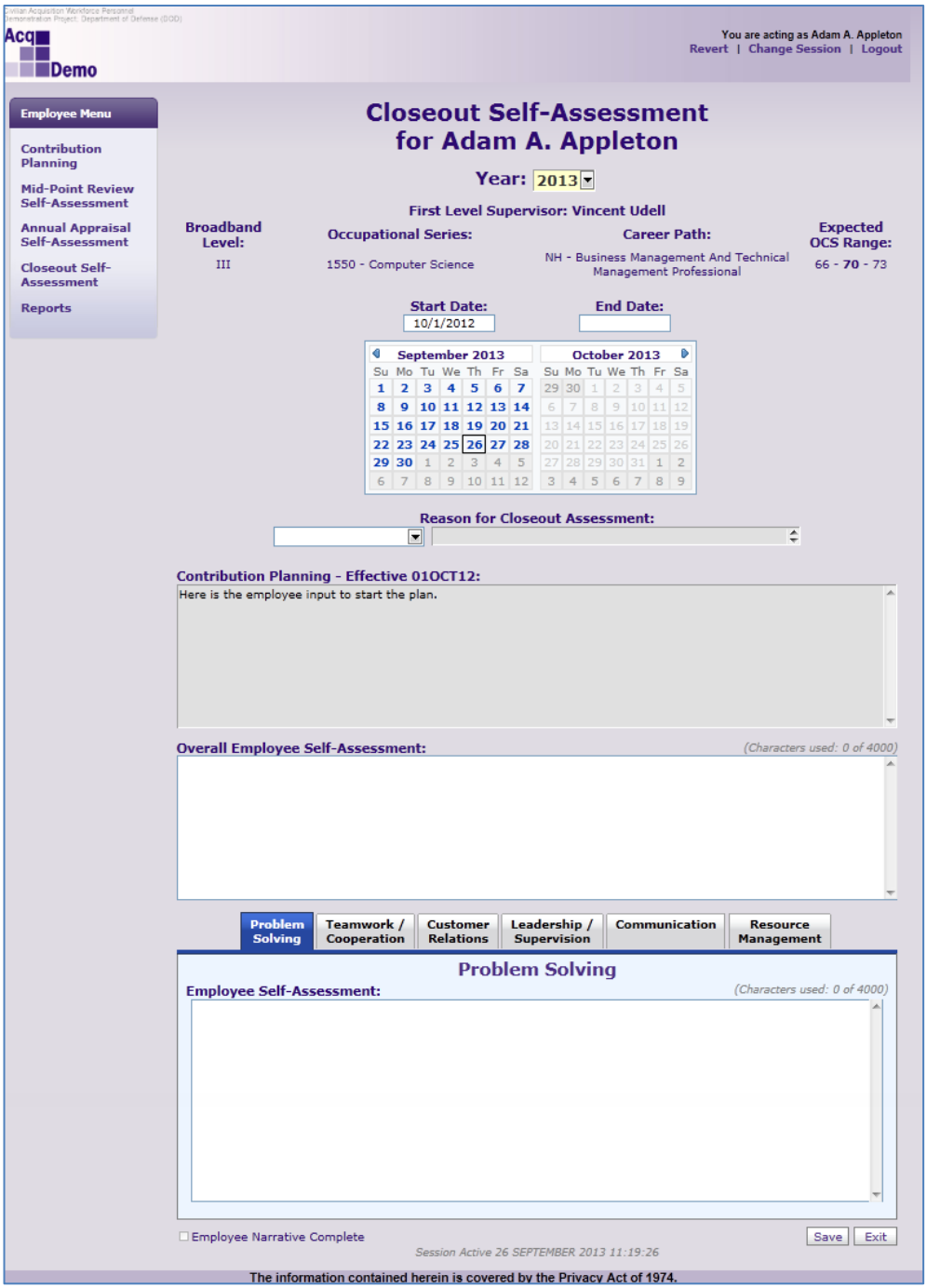


Figure 4-6: Closeout Self-Assessment Web Form

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

And | Or

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

Notes.

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

   When the 4000 character maximum is exceeded, CAS2Net pops up a warning that excess characters will be truncated and displays the text that is affected.
2. “Employee Narrative Complete” is information only. CAS2Net does not enforce any business rules regarding the employee’s “Employee Narrative Complete” state. Unchecking “Employee Narrative Complete” does not prevent the supervisor from locking the Closeout Self-Assessment.
3. The self-assessment page is displayed as “read only” when the supervisor has saved the Closeout Assessment with a checkmark in “Lock Employee Self-Assessment”.
4. When **any** factor score is saved in the Annual Appraisal, “current year” in-cycle assessment records are locked—including Contribution Planning, Mid-Point Review Self-Assessment, and Closeout Self-Assessment.
5. When copying text from MS Word some special characters in Word may not work in CAS2Net.

4.5 Reports

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

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

Figure 4-7: Employee Reports Menu

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

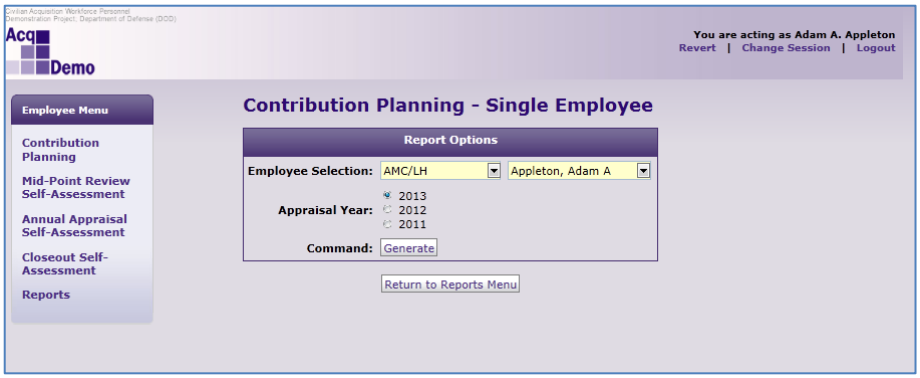


Figure 4-8: Employee Reports Options

Reference section “11.1 Employee Reports” for sample employee reports.

Contribution Planning for Uli Ulanov
Year: 2013

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

Method of Communication: **Date Conducted:** 08/22/13

Face to Face

Figure 4-9: 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 CCAS factor assessments in the Annual Appraisal module. CAS2Net supports the Level 1 Supervisor's ability to create and modify contribution 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**, **Closeout 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**, **Closeout Assessment** and **Reports**.

- The **Contribution Planning** option allows the supervisor to collaborate with the employee to create or modify contribution plans for the current appraisal cycle.
- **Additional Feedback** allows the supervisor to provide helpful guidance throughout the appraisal cycle.
- **Mid-Point Review** enables the supervisor to assess employee contributions at the mid-point of the annual the appraisal cycle.
- The **Annual Appraisal** allows the supervisor to document each employee's contribution ratings and assessments with respect to the AcqDemo contribution factor.
- **Closeout Assessment** is used to review employee contributions in the event of rating official or job change during the appraisal cycle.
- 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 generate another Contribution Planning instance via the "Modify" feature.

It is important to note that Contribution Planning must be "submitted" to be accessible by other CAS2Net processes--such as Additional Feedback and Annual Appraisal. An entry that is "In Progress" is not visible outside the 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 "Employee Narrative Complete" (Complete)
  - Red 'X' = Employee has saved input without checking "Employee Narrative Complete" (In Progress)

- (blank) = Employee has NOT saved Contribution Planning input

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

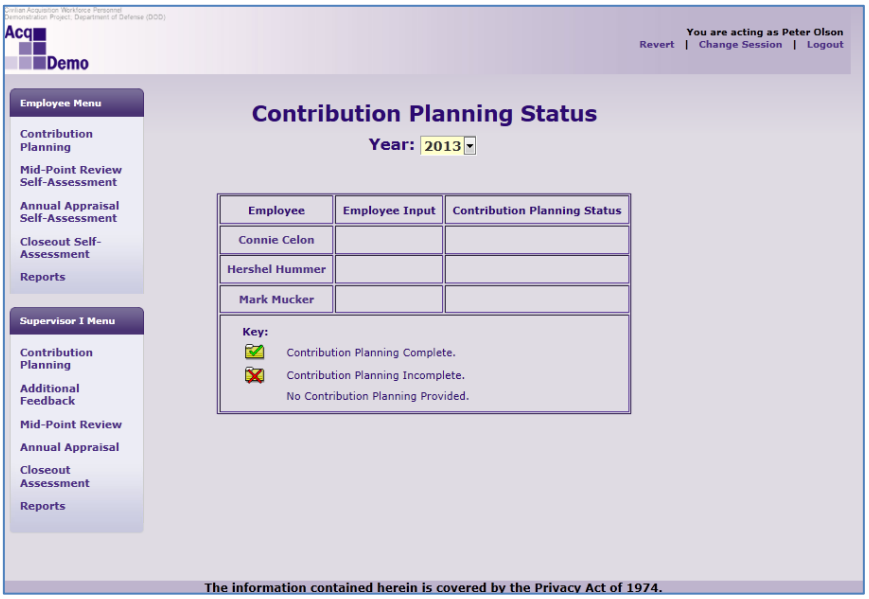


Figure 5-1: Supervisor Contribution Planning Status

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).

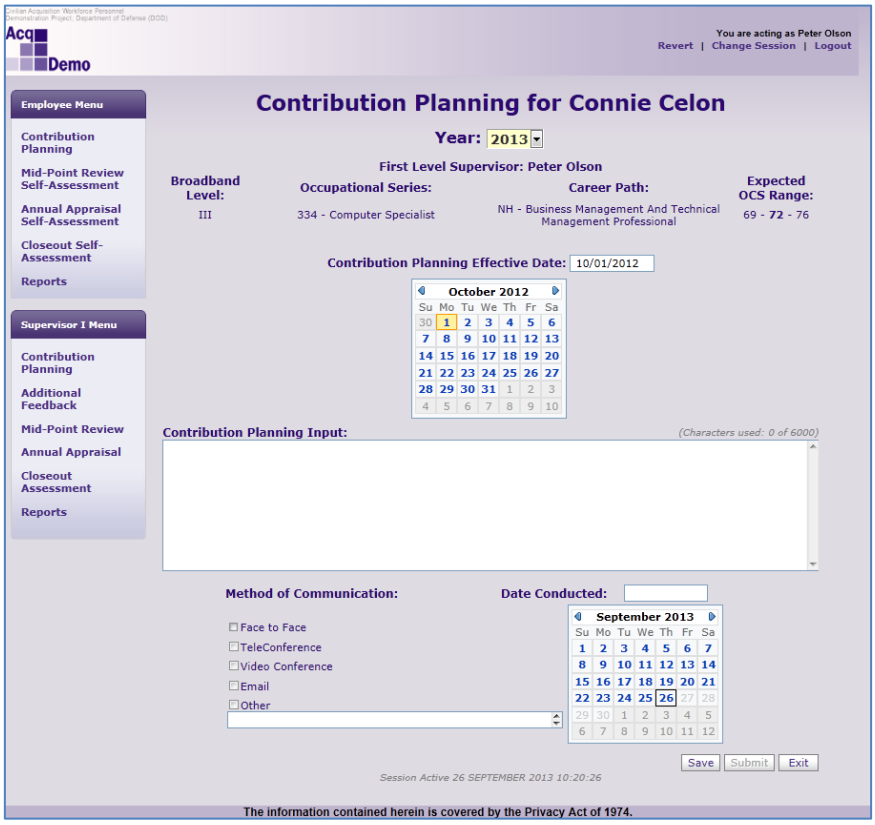


Figure 5-2: Supervisor Contribution Planning Web Form

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

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

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

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

1. Enter contribution objectives into the "Contribution Planning 'In Progress'" textbox.
2. Click "Save" to save changes and refresh the web page.
3. Click "Exit" to return to the Contribution Planning Status web page without saving changes.
4. After the supervisor meets with the employee to review the "Contribution Planning" content, the supervisor selects the date and method of communication and clicks "Submit" indicating the "Contribution Planning" process is complete.

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

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

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

MODIFY CONTRIBUTION PLANNING

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

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

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

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

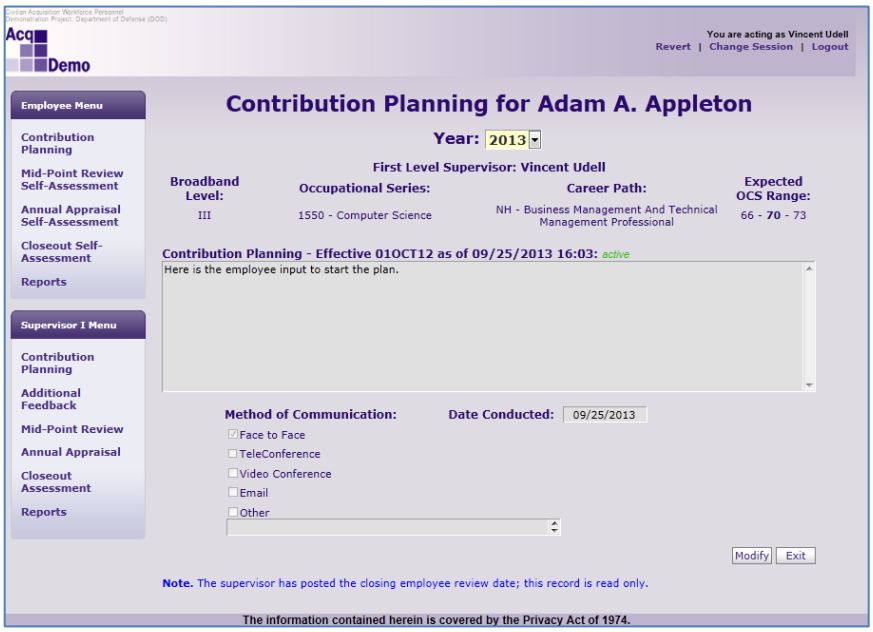


Figure 5-3: "Modify" Contribution Planning

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

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

When complete and reviewed with the employee, select date and method of 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 appraisal year. To accommodate appraisal 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.

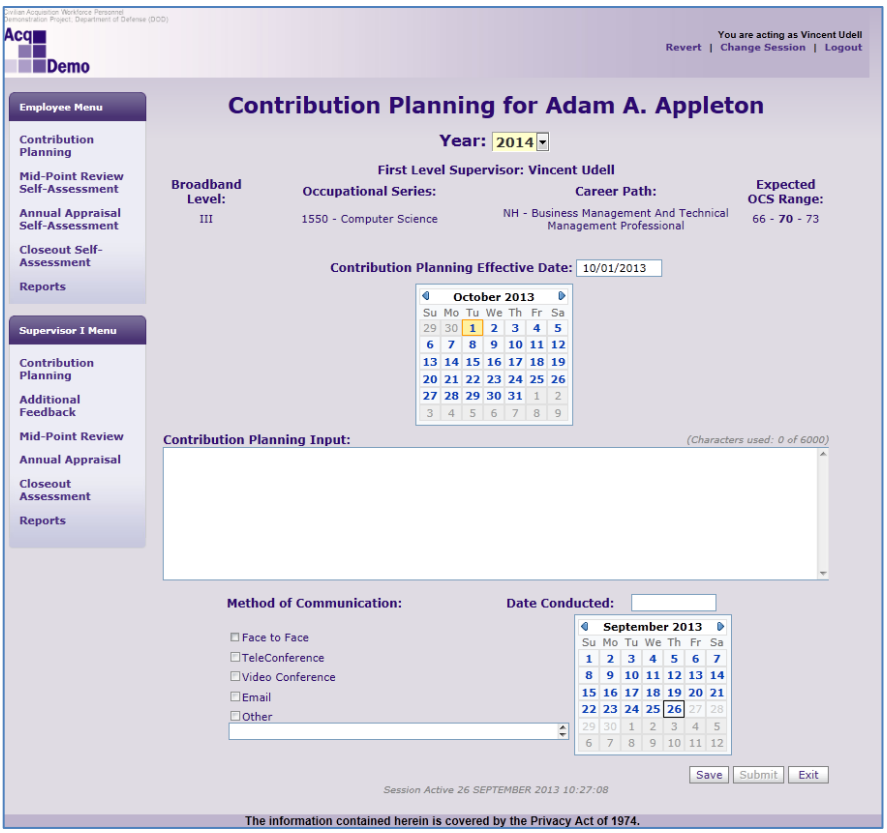


Figure 5-4: "Next Cycle Year" Supervisor Contribution Planning Web Form

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.

   Contribution Planning is the only narrative that accepts 6000 characters. Other types of narrative textboxes, such as contribution factor assessments, are limited to 4000 characters each.

2. "Employee Narrative Complete" is information only. CAS2Net does not enforce any business rules regarding the employee's "Employee Narrative Complete" state.

   Employee input status "In Progress" does not prevent the supervisor from submitting the Contribution Planning as "complete".

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

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

5.2 Additional Feedback

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

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

Additional Feedback Status

When "Additional Feedback" is selected in the Supervisor 1 Menu, the "Additional Feedback Status" web page is displayed.

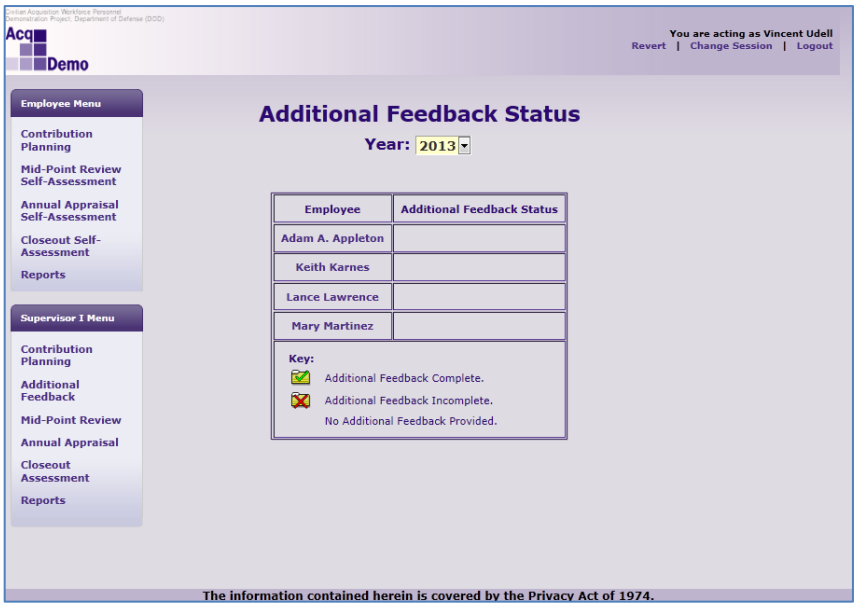


Figure 5-5: Supervisor Additional Feedback Status

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:
  - First Level Supervisor Name
  - Broadband Level
  - Occupational Series

  - Career Path
  - Expected OCS Range
- "Contribution Planning" 'read only' textbox contains the last submitted information - The Contribution Planning "Effective Date" is included in the subtitle
- "Overall Supervisor Feedback" textbox

(Tabs by CCAS Contribution Factor)

- Factor name subtitle => hot link to "Descriptors and Discriminators" page
- "Supervisor Assessment" textbox

(Tab for Employee Review Date)

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

(Status checkbox and action buttons)

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

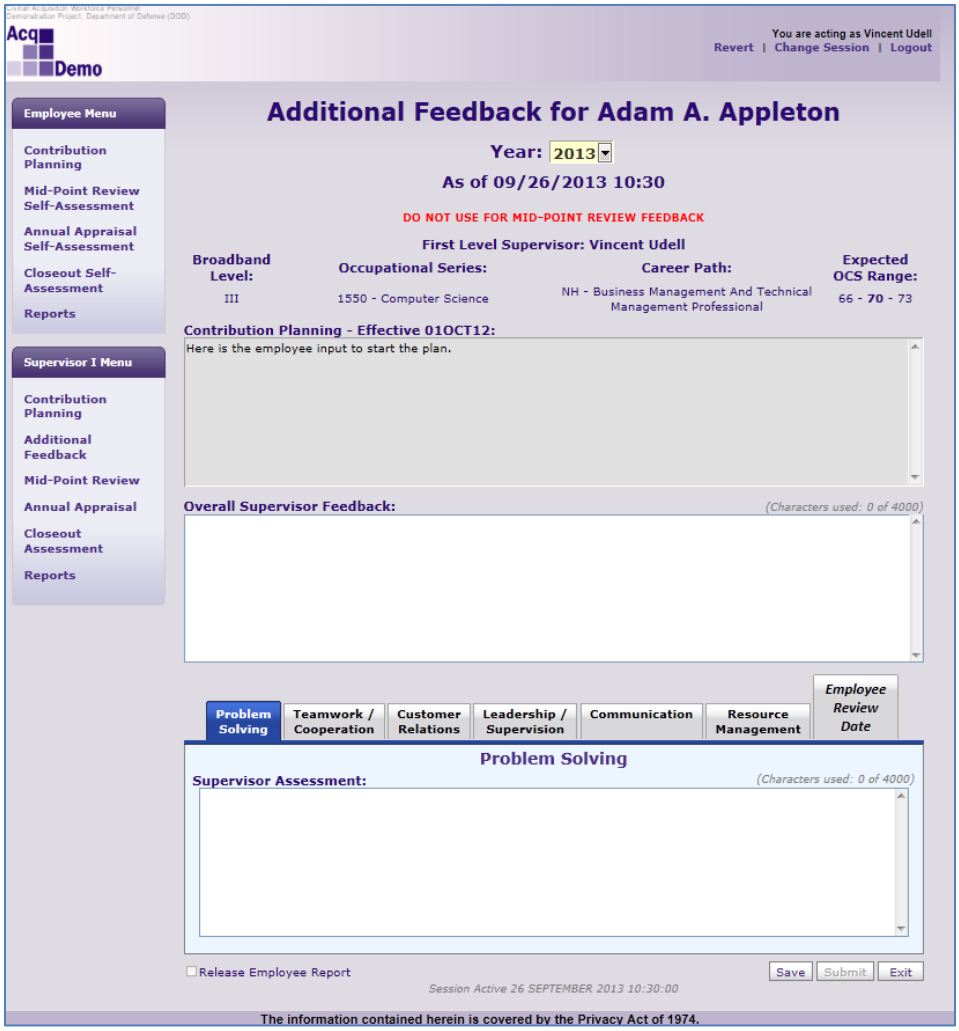


Figure 5-6: Supervisor Additional Feedback Web Form

1. Enter assessment content into the “Overall Supervisor Feedback” textbox or into one or more “Supervisor Assessment” textboxes provided with contribution factor tabs. Note that the factor name on each factor tab is a “hot link” to corresponding “Descriptors and Discriminators” for that factor.
2. Optionally, check the “Release Employee Report” checkbox to allow the employee to print the “Additional Feedback Report” while the entry is “In Progress”.

   Note: “Release Employee Report” is disabled before text is typed into any assessment textbox.
3. Click “Save” to save changes and refresh the web page.
4. Click “Exit” to return to the Additional Feedback Status page without saving changes.

   Note. Since “Exit” does not update the database, CAS2Net will prompt you to click “Save” when changes are outstanding.
5. After meeting with the employee to review the “Additional Feedback” content, select the date and method of communication and click “Submit” to indicate that the “Additional Feedback” process is complete.

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

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

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

CREATE ADDITIONAL FEEDBACK

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

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

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

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

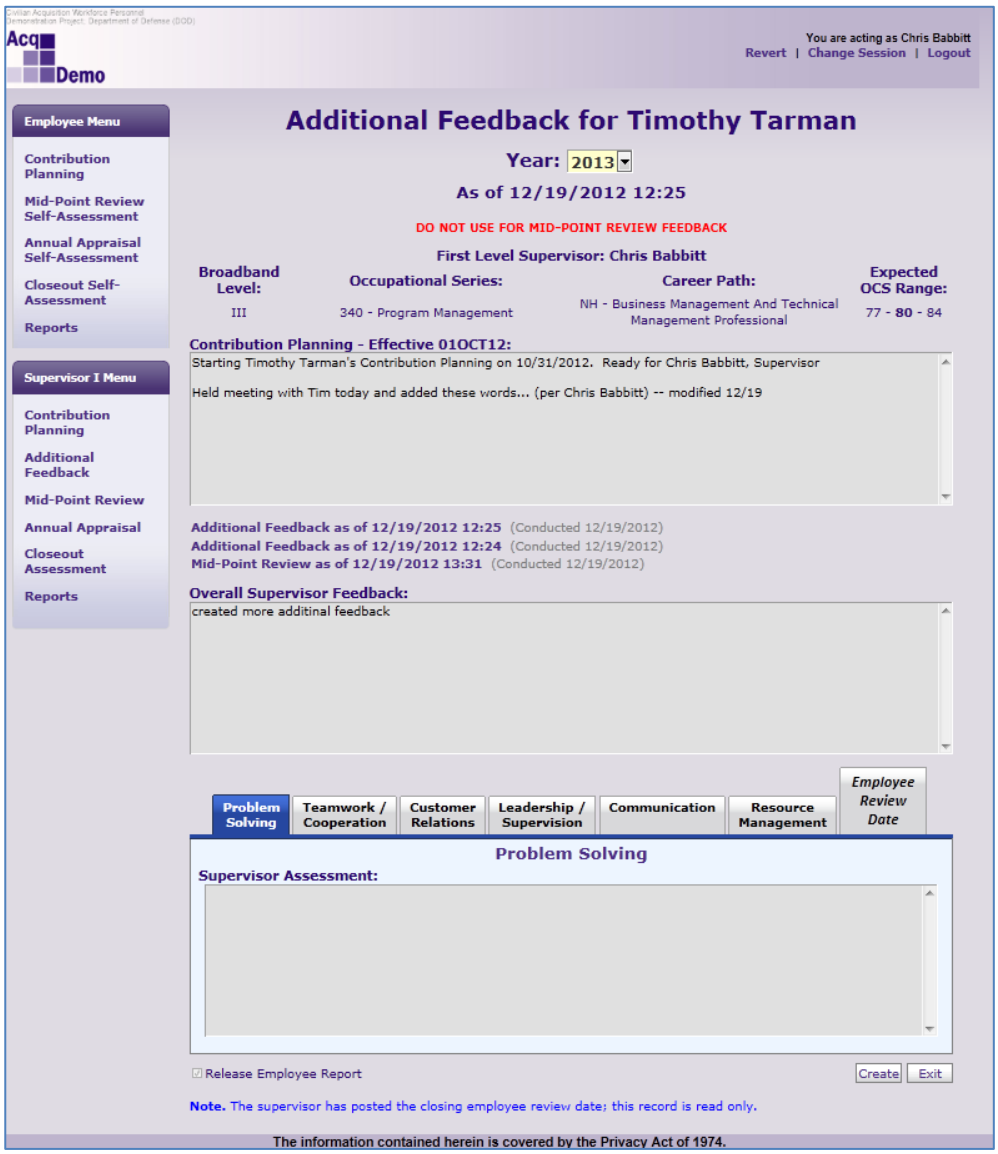


Figure 5-7: “Create” Additional Feedback

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

Enter the Additional Feedback text.

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

When Additional Feedback input is complete and reviewed with the employee, access the “Employee Review Date” tab to select the date and method 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, in-cycle assessment records are locked—including Contribution Planning, Additional Feedback, Mid-Point Review, and Closeout Assessment.

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

5.3 Mid-Point Review

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

MID-POINT REVIEW STATUS

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

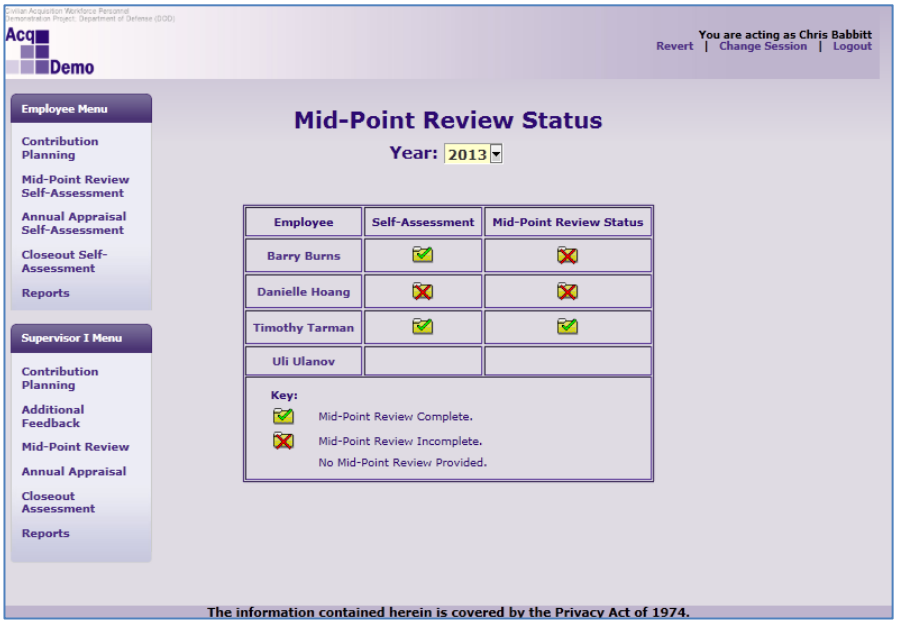


Figure 5-8: Supervisor Mid-Point Review Status

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

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

MID-POINT REVIEW WEB FORM

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

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

- Mid-Point Review "Year"
- Employee attribute subtitle:
  - First Level Supervisor Name

  - Broadband Level
  - Occupational Series
  - Career Path
  - Expected OCS Range
- Conditional advisory message to alert the supervisor that the employee's Mid-Point Review Self-Assessment is incomplete
- "Contribution Planning" 'read only' textbox contains the last submitted information - The Contribution Planning "Effective Date" is included in the subtitle

(Tabs by CCAS Contribution Factor)

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

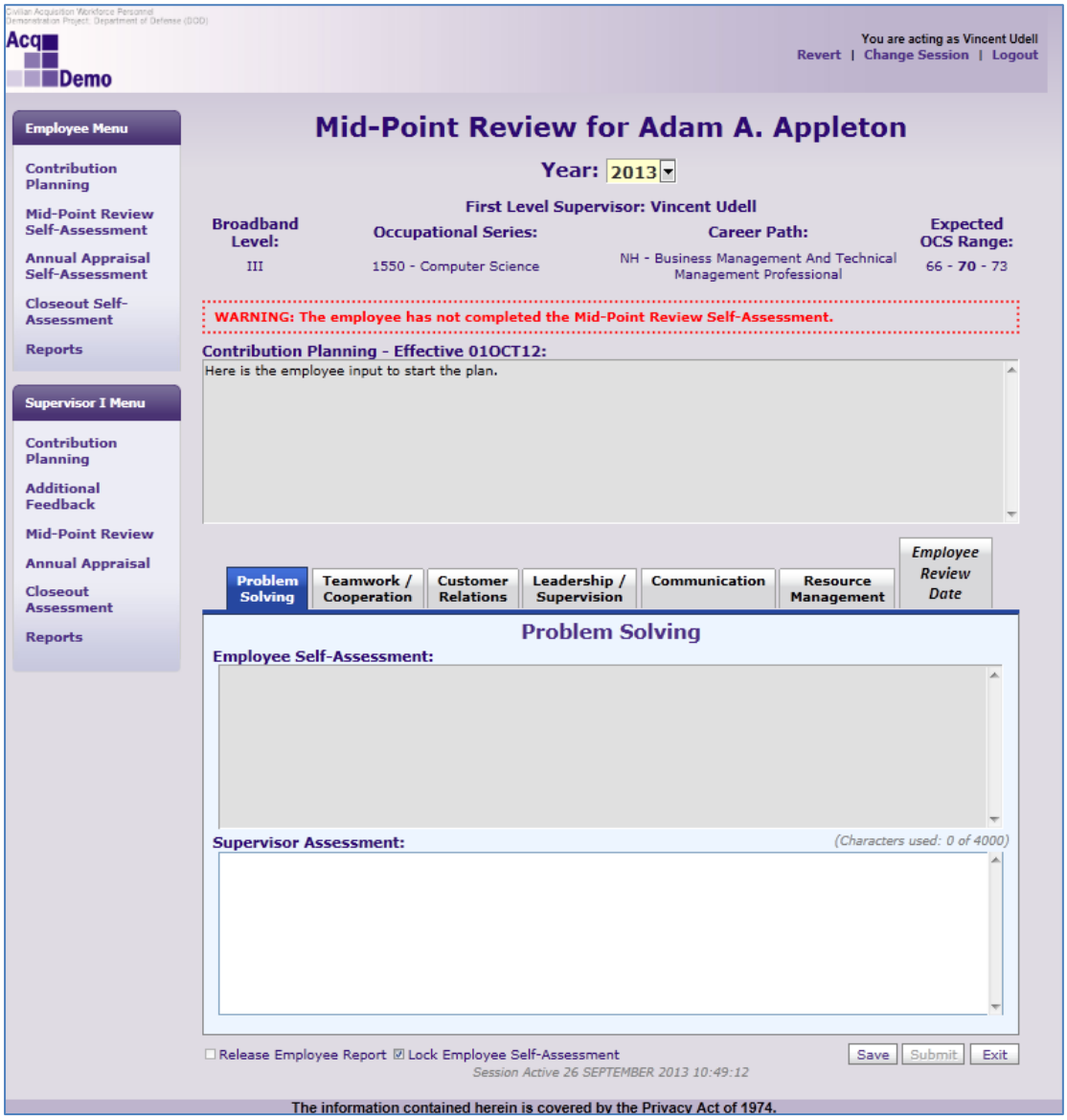


Figure 5-9: Supervisor Mid-Point Review Web Form

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

1. Enter assessment content into "Supervisor Assessment" textboxes provided with contribution factor tabs. Note that the factor name on each factor tab is a "hot link" to corresponding "Descriptors and Discriminators" for that factor.
2. Optionally, check the "Release Employee Report" checkbox to allow the employee to print the "Mid-Point Review Report" while the entry is "In Progress".

   Note: "Release Employee Report" is disabled before text is typed into any assessment textbox.
3. Optionally, uncheck the "Lock Employee Self-Assessment" to enable the employee to update his self-assessment record when the supervisor saves the Mid-Point Review.

   Note: "Lock Employee Self-Assessment" defaults to "checked" in keeping with PMO policy that the self-assessment should not change when the supervisor begins work on the Mid-Point Review. Once saved, the "checked" or "unchecked" value persists until changed by the supervisor.
4. Click "Save" to save changes and refresh the web page.
5. Click "Exit" to return to the Mid-Point Review Status page without saving changes.
6. After meeting with the employee to go over the "Mid-Point Review" content, select the date and method of communication and click "Submit" to indicate that the "Mid-Point Review" process is complete.

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

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

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

REOPEN MID-POINT REVIEW

CAS2Net allows supervisors to reopen the Mid-Point Review at any time before the supervisor has begun scoring contribution factors in the Annual Appraisal for the given cycle year.

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

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

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

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

Note that reverting to “In Progress” status has the following normal—but possibly unintended—consequences:

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

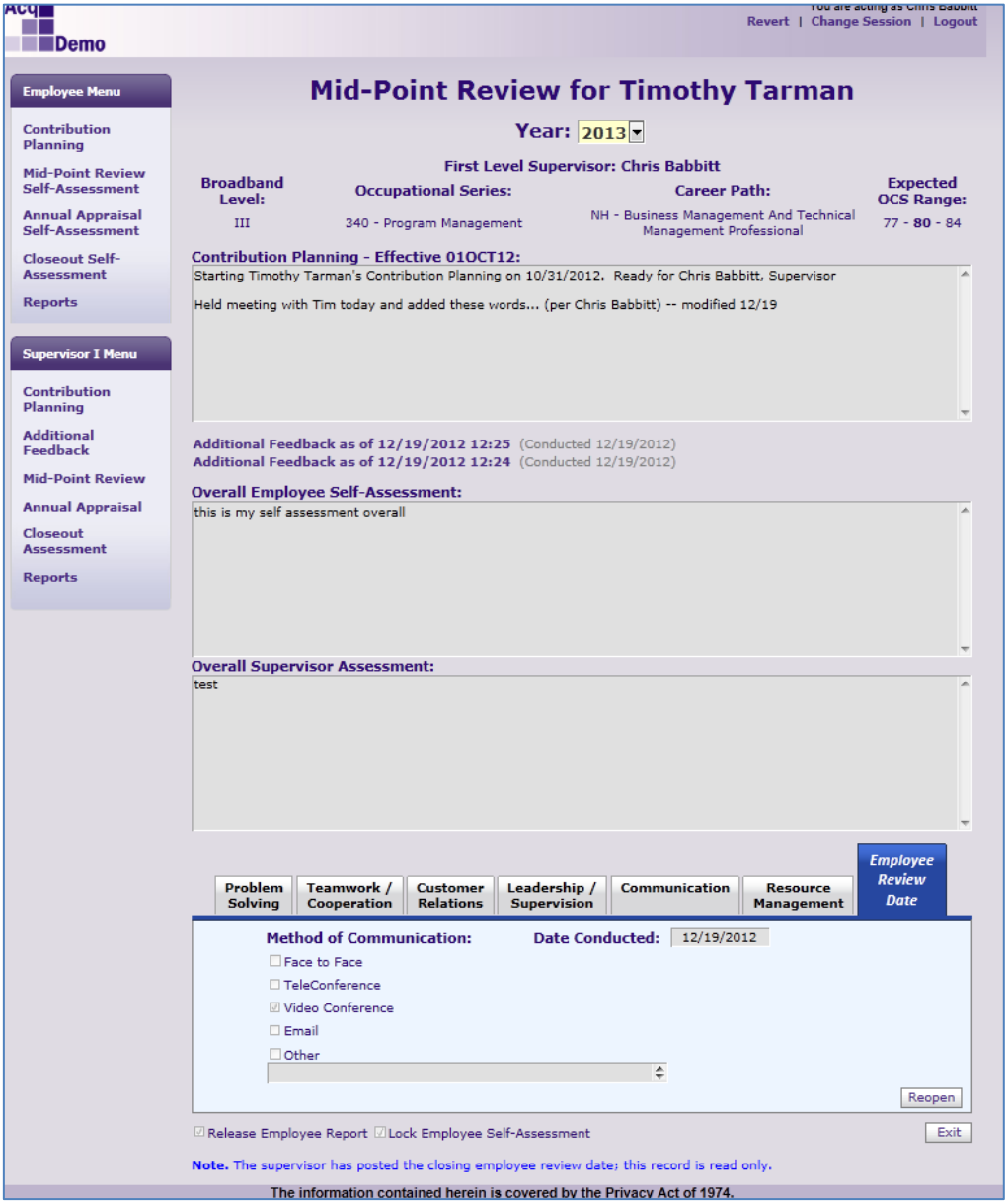


Figure 5-10: “Reopen” Mid-Point Review

Notes.

1. The "Character Count" shown on the right just above each assessment textbox estimates the number of *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 "Employee Narrative Complete" state.

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

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

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

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

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

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

5.4 Annual Appraisal

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

ANNUAL APPRAISAL STATUS

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 Narrative status
- Categorical Status
- Numerical Status
- Presumptive Status

Status values include:

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

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

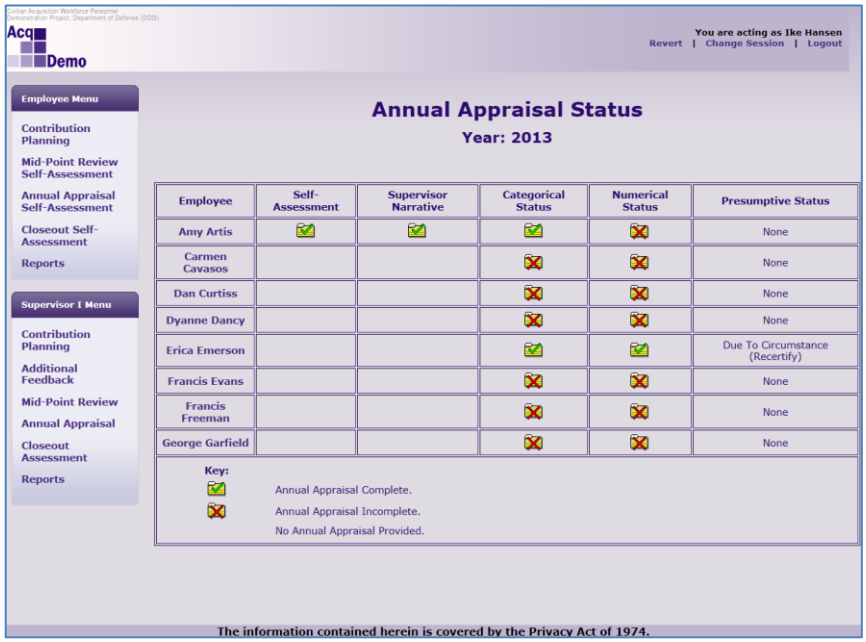


Figure 5-11: Annual Appraisal Status

ANNUAL APPRAISAL WEB FORM

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

Annual Appraisal web page includes:

- Employee attribute subtitle:
  - Broadband Level
  - Occupational Series
  - Career Path
  - Expected OCS Range
  - Actual OCS
- Conditional advisory message to alert the supervisor that the employee's Annual Appraisal Self-Assessment is incomplete
- "Contribution Planning" 'read only' textbox contains the last submitted information - The Contribution Planning "Effective Date" is included in the subtitle
- "Hot links" to access "current year" Additional Feedback, Mid-Point Review and Closeout Assessment records (if available)
- Tabs by rating factor: Problem Solving, Teamwork/Cooperation, Customer Relations, Leadership/Supervision, Communication, Resource Management

  (Each factor includes)
  - "Descriptors and Discriminators" link
  - Employee Self-Assessment 'read only' textbox
  - Factor weight
  - Categorical score dropdown list
  - Numerical score dropdown list
  - Supervisor comment text box
- (Tab for Employee Review Date)
  - Method of Communication checkboxes (Face to Face, Teleconference, Video Conference, Email, Other)
  - "Other" method of communication text
  - Date Conducted
  - Date Conducted calendar control
- (Status checkbox and action buttons)
  - "Supervisor Narrative Complete" checkbox
  - "Lock Employee Self-Assessment" checkbox
  - "Save" and "Exit" buttons

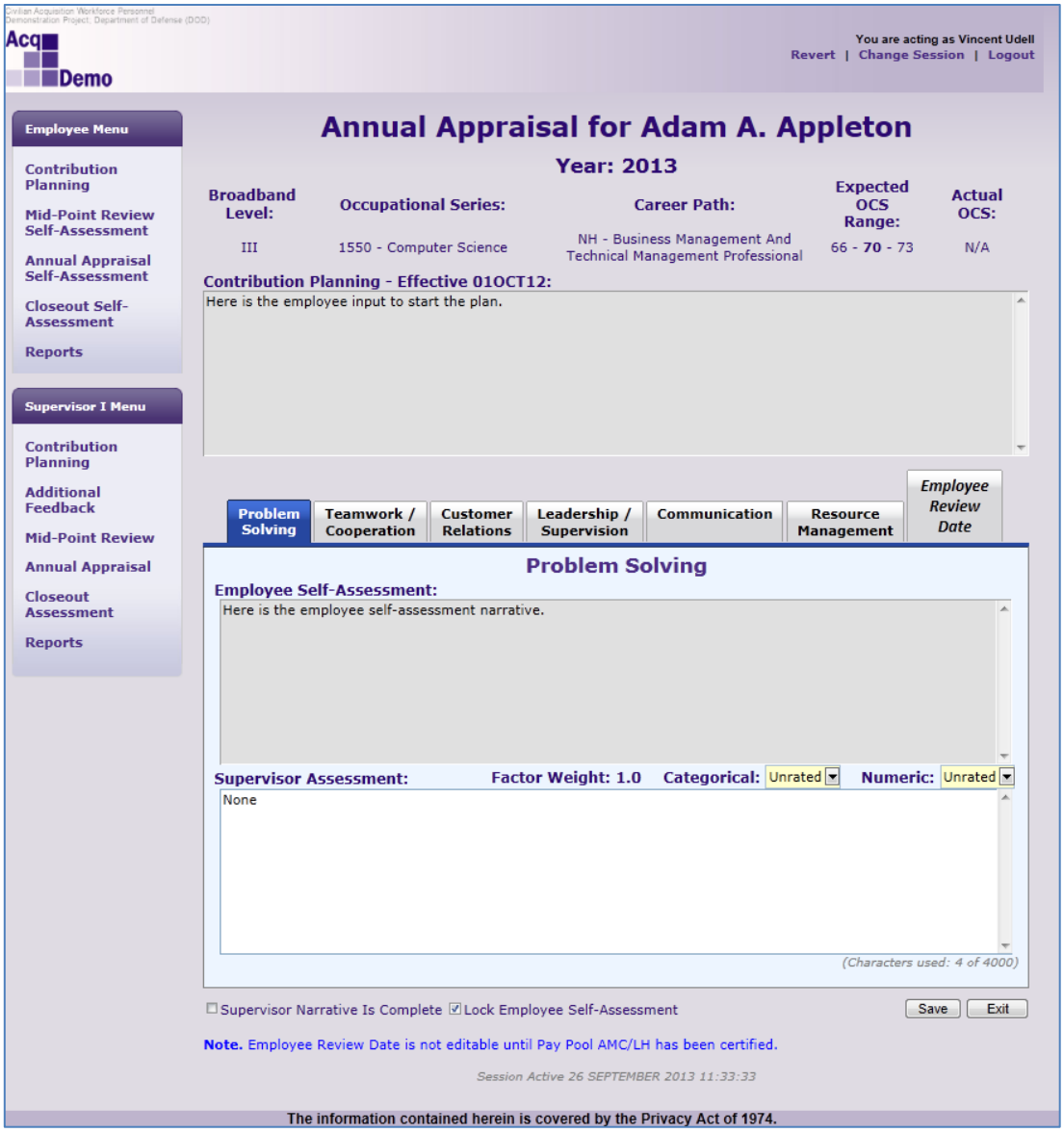


Figure 5-12: Annual Appraisal Web Form

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

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

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

ANNUAL APPRAISAL - EMPLOYEE REVIEW TAB

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

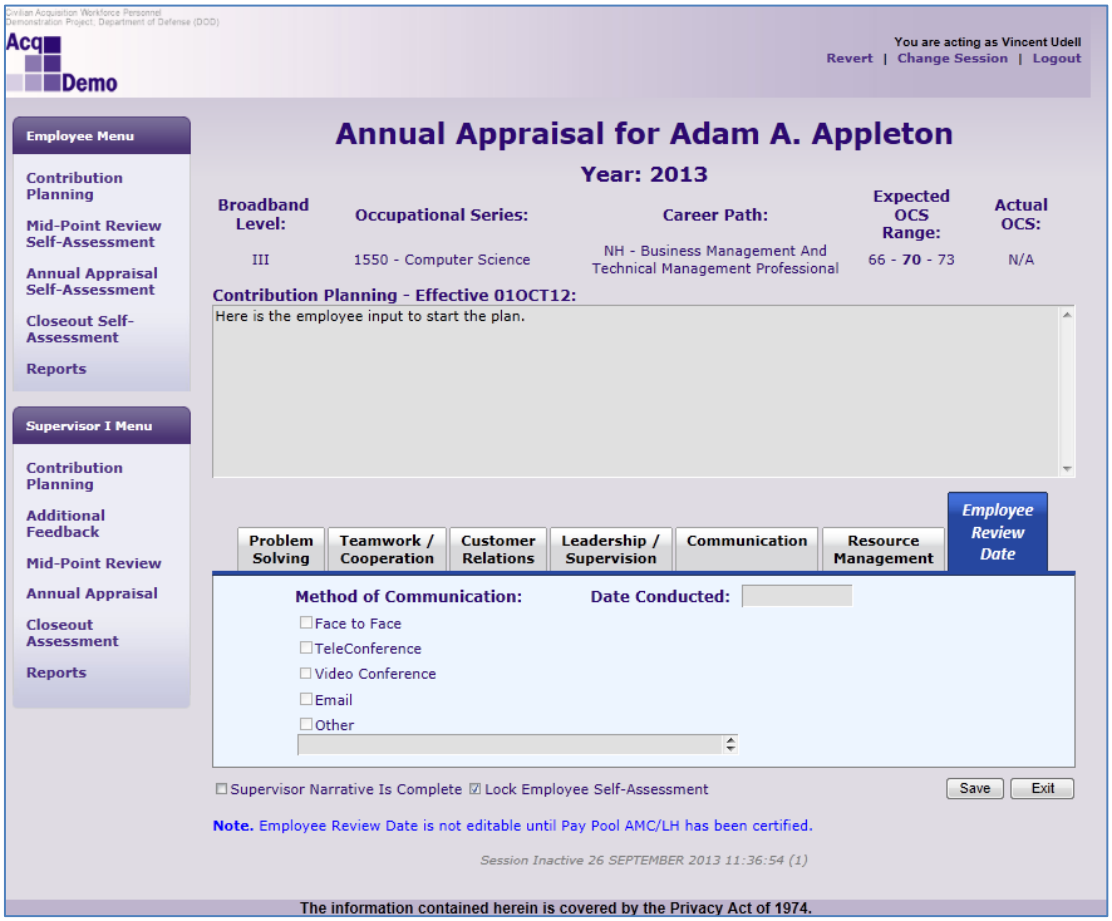


Figure 5-13: Annual Appraisal "Employee Review Date" Tab

Notes.

1. CAS2Net treats “Categorical” scores as optional since they may not be required by all AcqDemo organizations. Changing a “Categorical” score to “Unrated” does not affect the corresponding “Numerical” score. Changing “Categorical” to a different rating value causes the corresponding “Numerical” score to revert to “Unrated”.
2. The “Character Count” shown on the right just above each assessment textbox estimates the number of *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.
3. The employee’s self-assessment status is information only. CAS2Net does not enforce any business rules regarding the self-assessment “Employee Narrative Complete” state.

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

5.5 Closeout Assessment

CAS2Net supports one or more Closeout Assessments for an employee during an appraisal cycle to evaluate employee contributions in the event of a change in position or rating official. Either the employee or the supervisor can initiate the Closeout process.

CLOSEOUT ASSESSMENT STATUS

When "Closeout Assessment" is selected in the Supervisor 1 Menu, the "Closeout Assessment Status" web page is displayed.

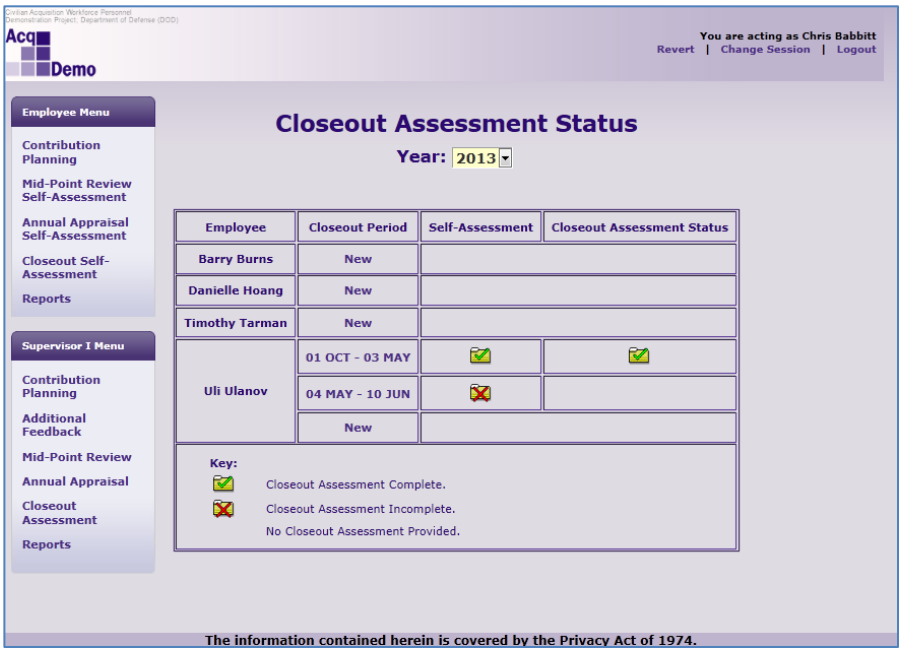


Figure 5-14: Supervisor Closeout Assessment Status

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

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

CLOSEOUT ASSESSMENT WEB FORM

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

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

- Closeout Assessment "Year"
- Employee attribute subtitle:
  - First Level Supervisor Name
  - Broadband Level
  - Occupational Series
  - Career Path
  - Expected OCS Range
- Conditional advisory message to alert the supervisor that the employee's Closeout Self-Assessment is incomplete
- Closeout Period details:
  - "Start Date"
  - "End Date"
  - "Reason for Closeout Assessment"
- "Contribution Planning" 'read only' textbox contains the last submitted information - The Contribution Planning "Effective Date" is included in the subtitle
- "Hot links" to access "current year" Additional Feedback, Mid-Point Review and previous Closeout Assessment records (if available)
- "Overall Employee Self-Assessment" 'read only' textbox
- "Overall Supervisor Feedback" textbox

(Tabs by CCAS Contribution Factor)

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

(Tab for Employee Review Date)

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

(Status checkbox and action buttons)

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

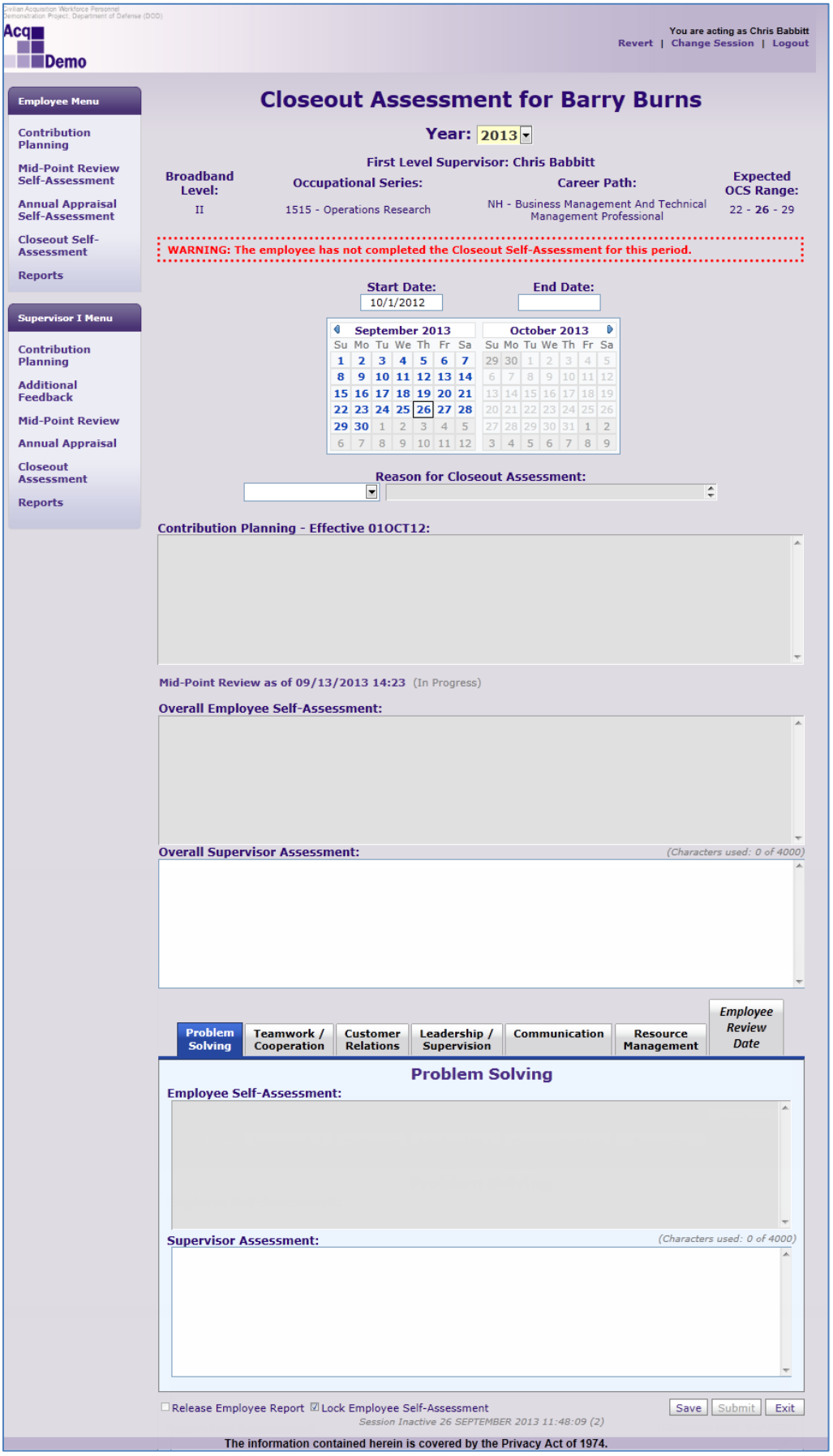


Figure 5-15: Supervisor Closeout Assessment Web Form

1. Enter assessment content into "Overall Supervisor Assessment" and "Supervisor Assessment" textboxes provided with contribution factor tabs. Note that the factor name on each factor tab is a "hot link" to corresponding "Descriptors and Discriminators" for that factor.
2. Optionally, check the "Release Employee Report" checkbox to allow the employee to print the "Closeout Assessment Report" while the entry is "In Progress".

   Note: "Release Employee Report" is disabled before text is typed into any assessment textbox.
3. Optionally, uncheck the "Lock Employee Self-Assessment" to enable the employee to update his self-assessment record when the supervisor saves the Closeout Assessment.

   Note: "Lock Employee Self-Assessment" defaults to "checked" in keeping with PMO policy that the self-assessment should not change when the supervisor begins work on the Closeout Assessment. Once saved, the "checked" or "unchecked" value persists until changed by the supervisor.
4. Click "Save" to save changes and refresh the web page.
5. Click "Exit" to return to the Closeout Assessment Status page without saving changes.
6. After meeting with the employee to go over the Closeout Assessment content, select the date and method of communication and click "Submit" to indicate that the Closeout Assessment process is complete.

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

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

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

REOPEN CLOSEOUT ASSESSMENT

CAS2Net allows supervisors to reopen a Closeout Assessment at any time before the supervisor has begun scoring contribution factors in the Annual Appraisal for the given cycle year.

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

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

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

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

Note that reverting to "In Progress" status has the following normal—but possibly unintended—consequences:

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

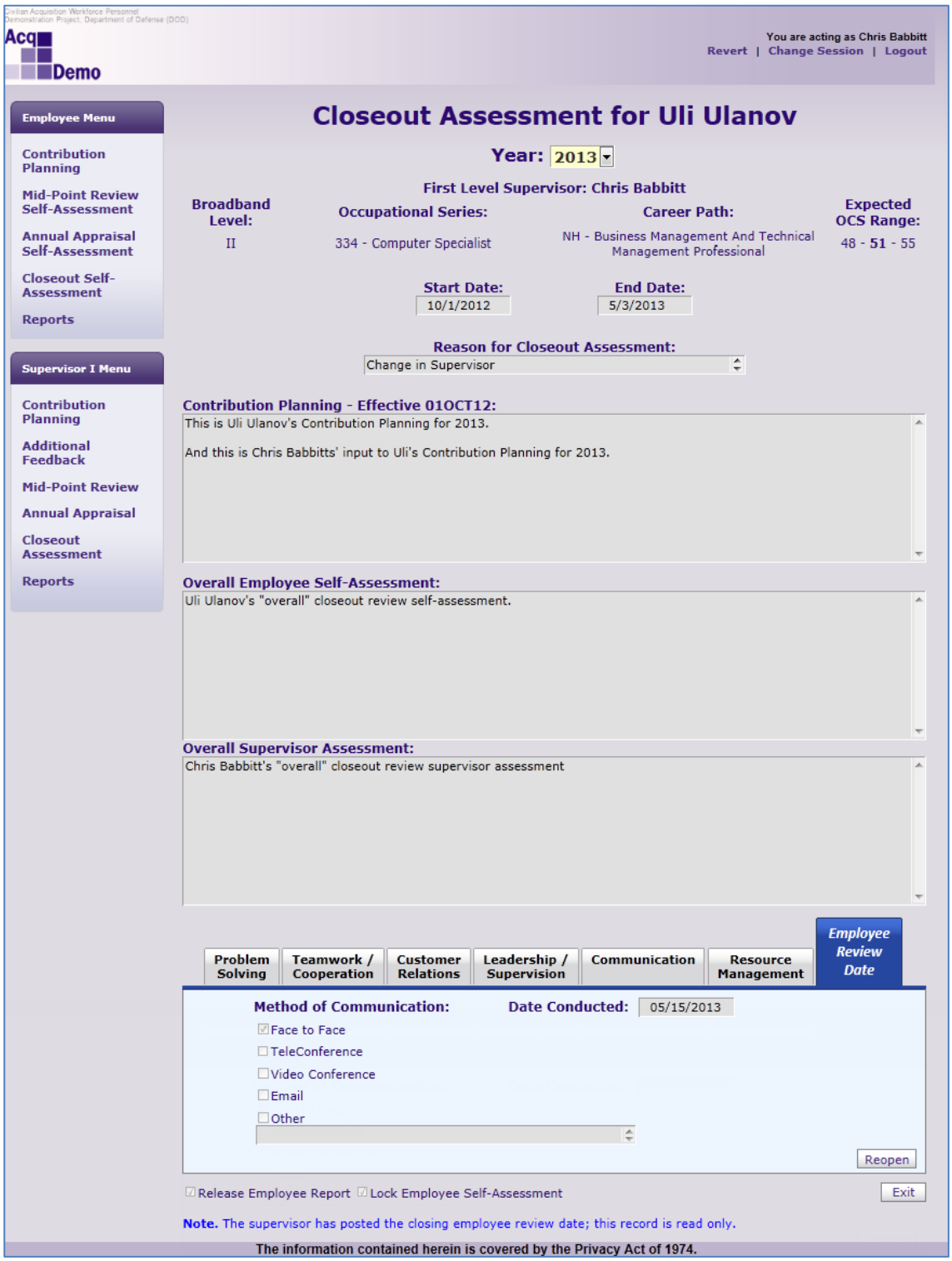


Figure 5-16: "Reopen" Closeout Assessment

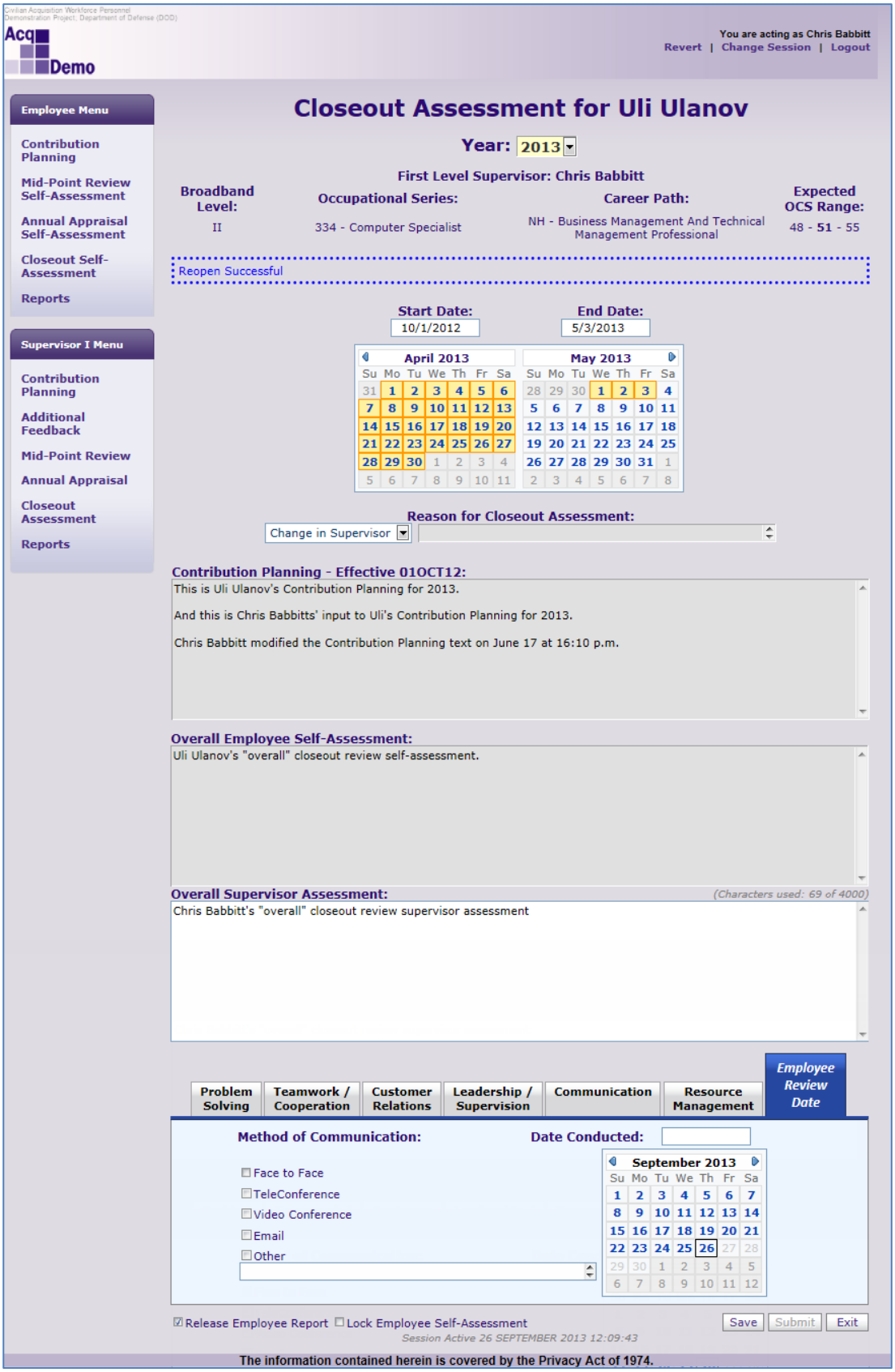


Figure 5-17: "Reopened" Closeout Assessment Web Form

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 "Employee Narrative Complete" state.

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

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

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

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

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

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

5.6 Reports

Click “Reports” in the Supervisor I Menu of the navigation bar to display the Supervisor I Reports menu. CAS2Net displays the following report options for the Level 1 Supervisor.

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

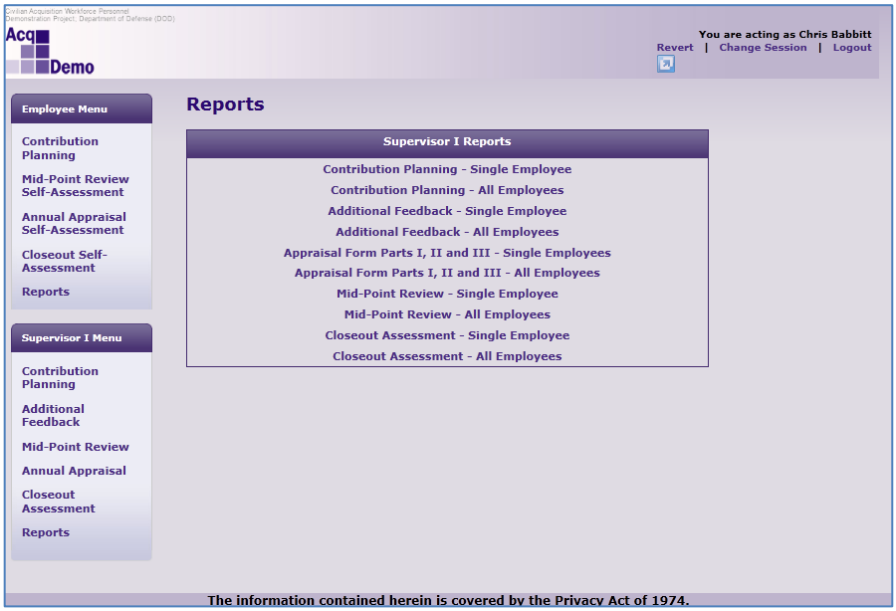


Figure 5-18: Level 1 Supervisor Reports Menu

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

LEVEL 1 SUPERVISOR REPORT - SINGLE EMPLOYEE

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

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

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

Refer to Section "11.2 Supervisor Reports" for report samples.

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

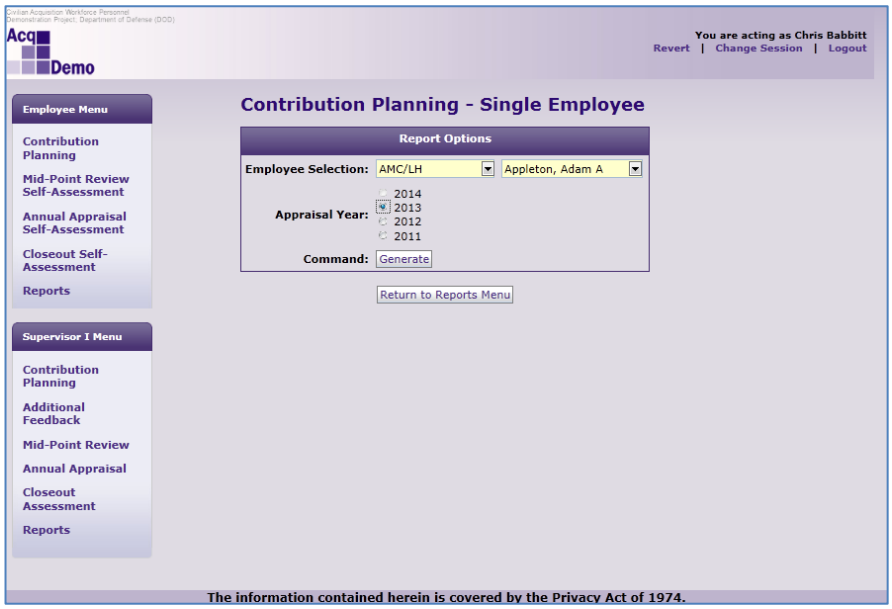
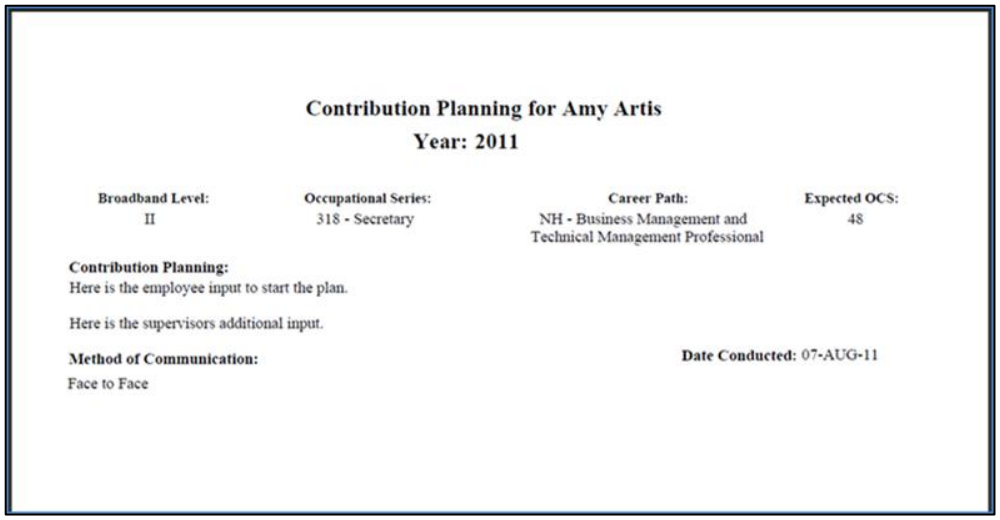


Figure 5-19: Level 1 Supervisor Single Employee Report Selection



Contribution Planning for Amy Artis
Year: 2011

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	318 - Secretary	NH - Business Management and Technical Management Professional	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 5-20: Level 1 Supervisor Single Employee Report Sample

LEVEL 1 SUPERVISOR REPORT – ALL EMPLOYEES

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

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

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

Refer to Section "11.2 Supervisor Reports" for report samples.

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

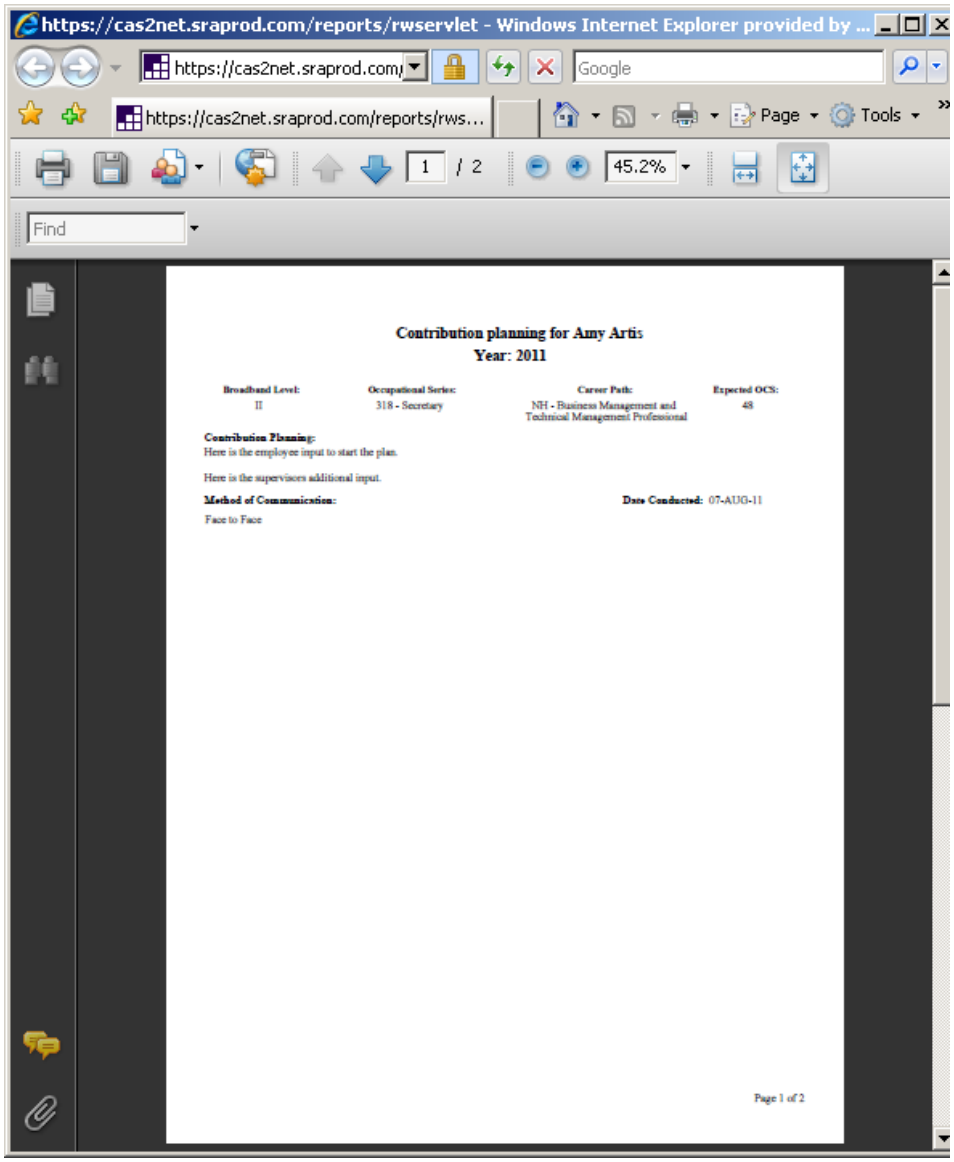


Figure 5-22: Level 1 Supervisor All Employees Report Sample

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 contribution 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**, **Closeout Self-Assessment**, and **Reports**.

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

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

These features are detailed in Section "5. Level 1 Supervisor".

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

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

7. SUB-PANEL MANAGER

The Sub-Panel Manager uses CAS2Net to review the rating of a selected employee for completeness of forms and accurate application and adherence to AcqDemo policies and procedures. The Sub-Panel Manager also reviews the contribution 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**, **Closeout Self-Assessment**, and **Reports**.

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

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

These features are detailed in Section "5. Level 1 Supervisor".

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.

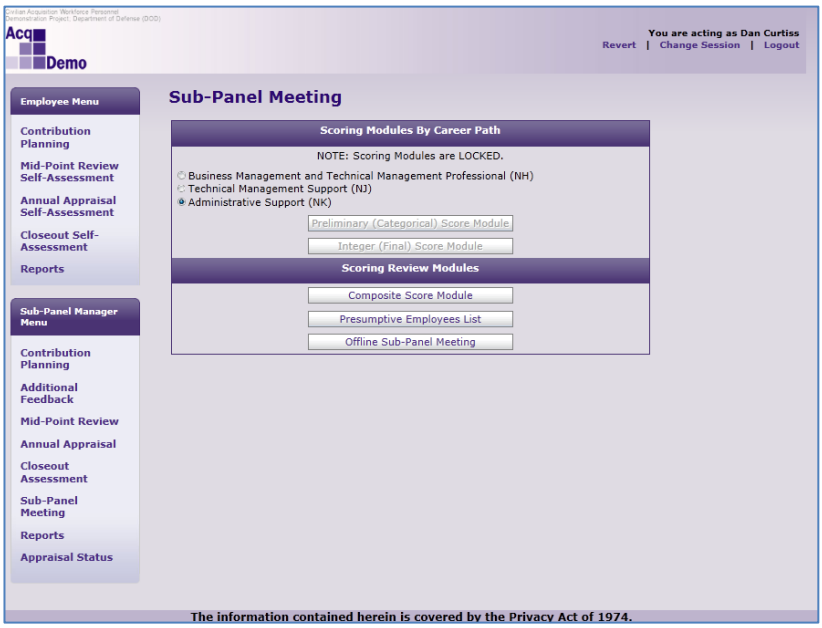


Figure 7-1: Sub Panel Meeting Menu

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 contribution factor relative to others in the same career path and level of performance.

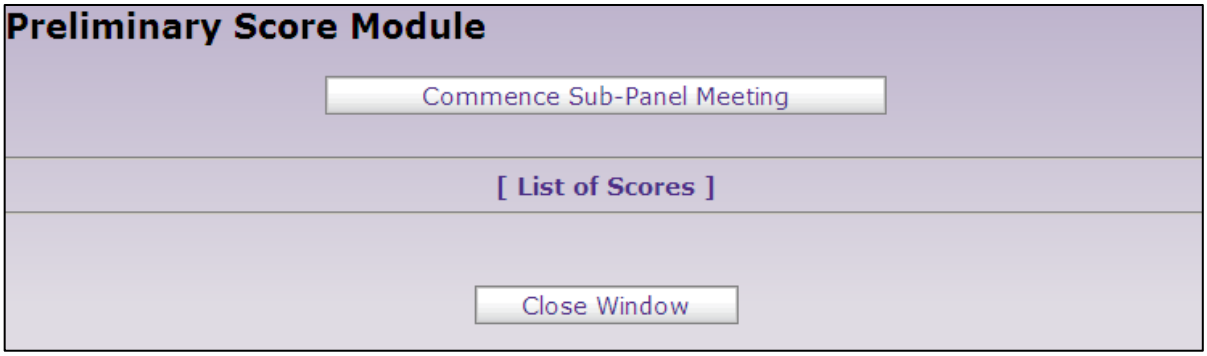
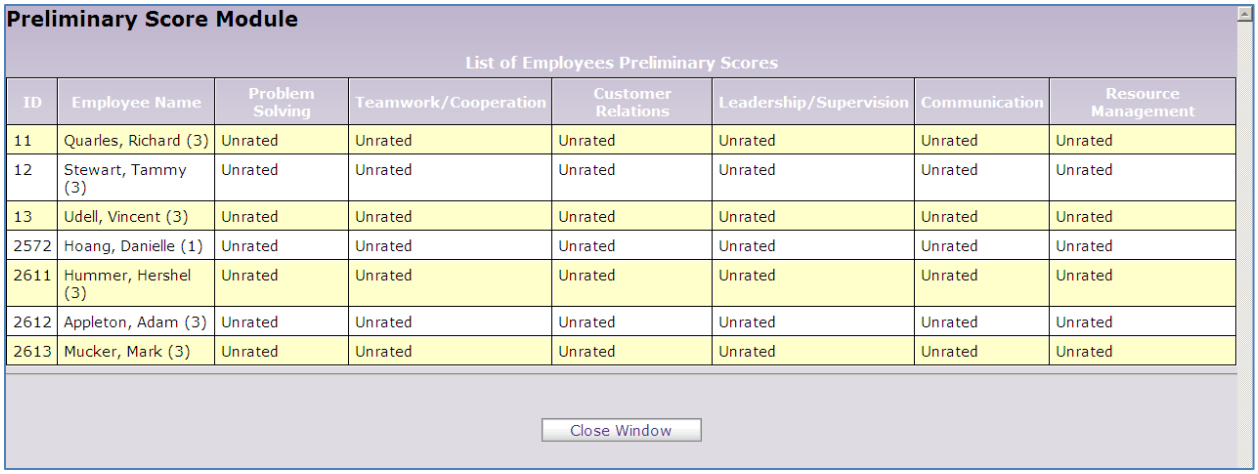


Figure 7-2: Preliminary (Categorical) Score Module "Selection"

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

Close Window

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.

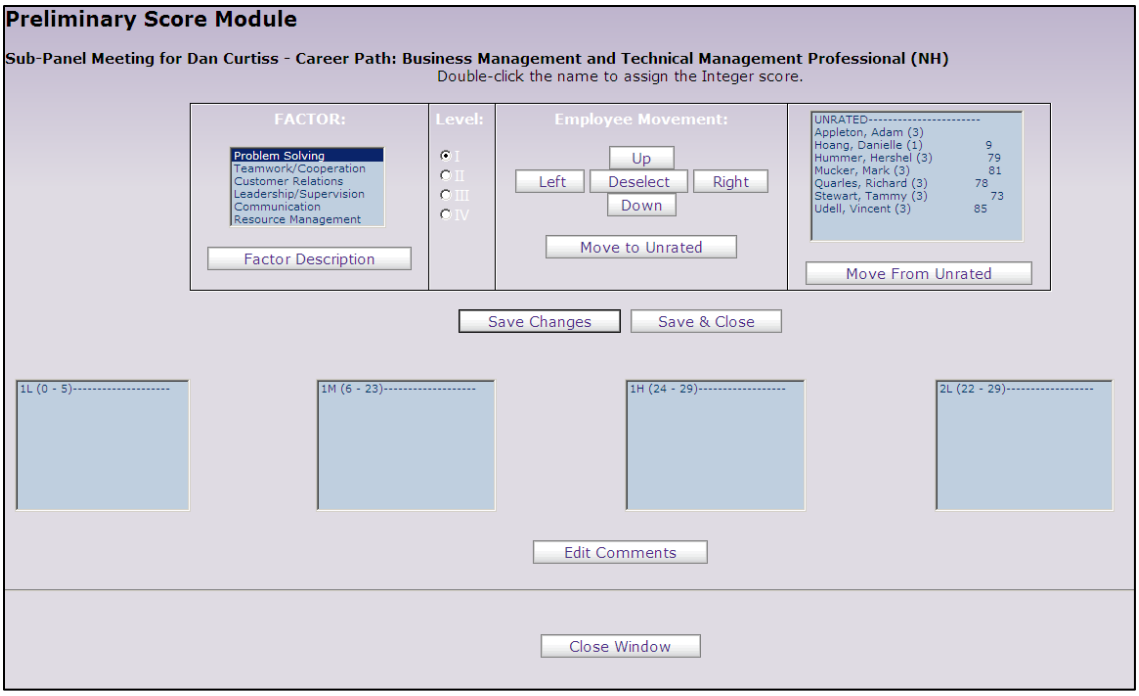


Figure 7-4: Preliminary (Categorical) Score Module Web Page

Integer (Numeric) 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 is 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.

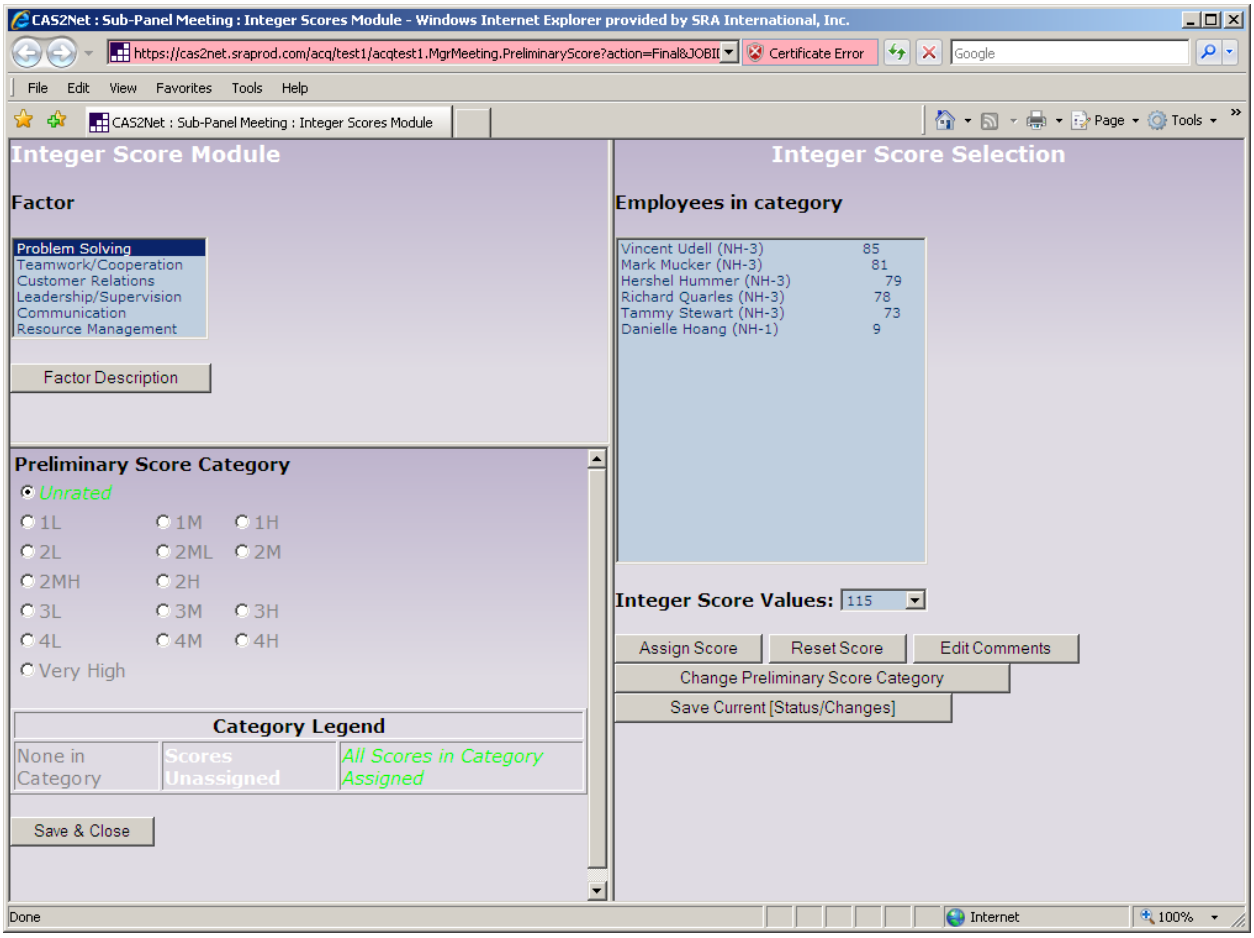


Figure 7-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

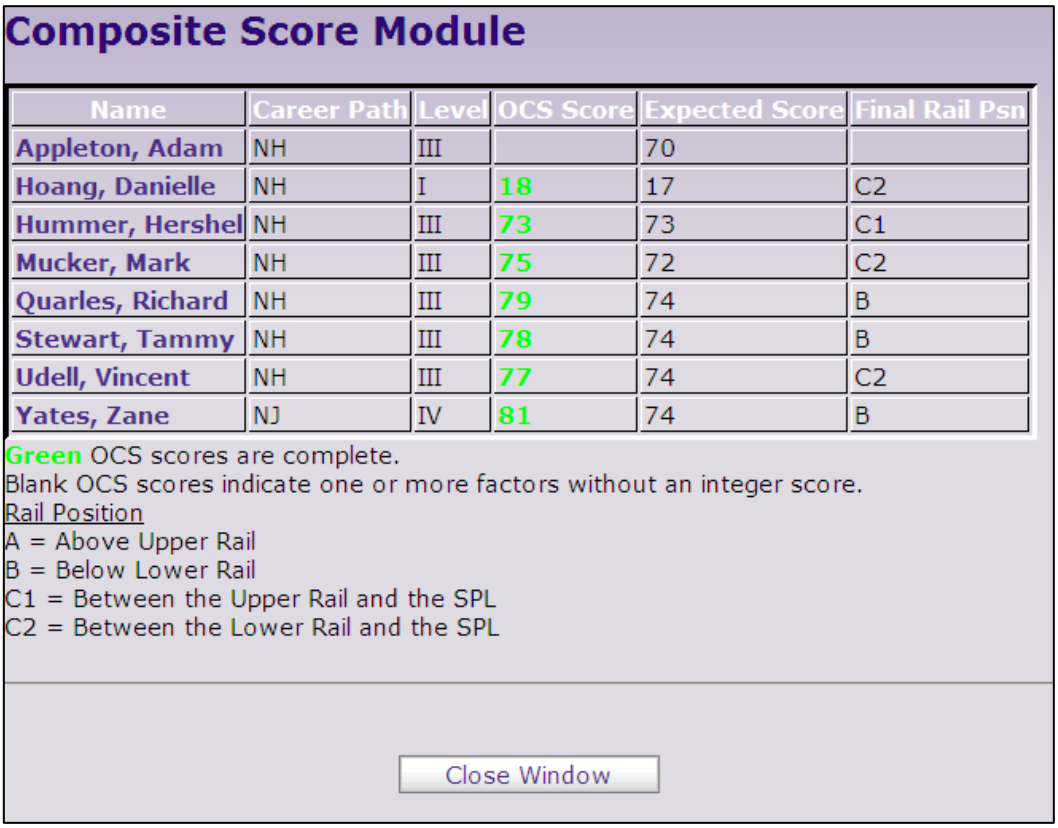
Integer scores are restricted to specific ranges that vary by career path and preliminary category. When the preliminary category is omitted, any integer score for the given career path is selectable.

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 contribution 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 contribution 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

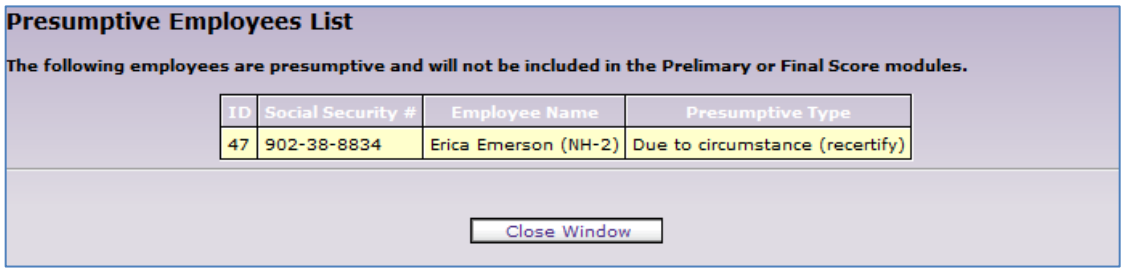
Figure 7-6: Composite Score Module Web Page

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 Prelimary or Final Score modules.

ID	Social Security #	Employee Name	Presumptive Type
47	902-38-8834	Erica Emerson (NH-2)	Due to circumstance (recertify)

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.

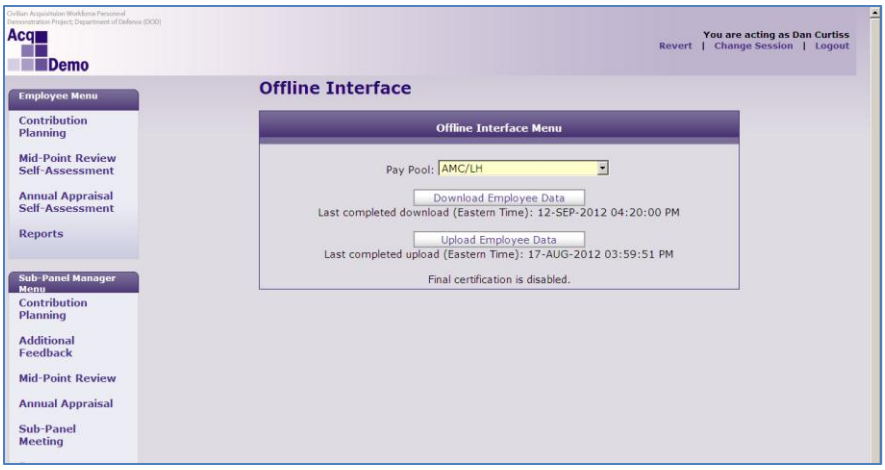


Figure 7-8: Sub Panel Meeting "Offline Interface" Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

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

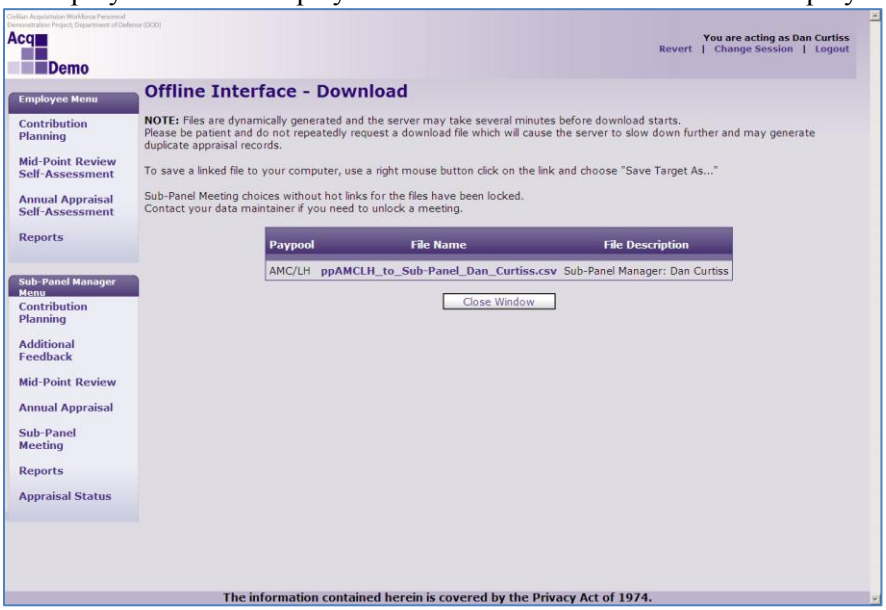


Figure 7-9: Offline Interface – Download Employee Data

The Sub-Panel Manager has the capability to download sub-panel employee data that can later be imported into the CMS 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.

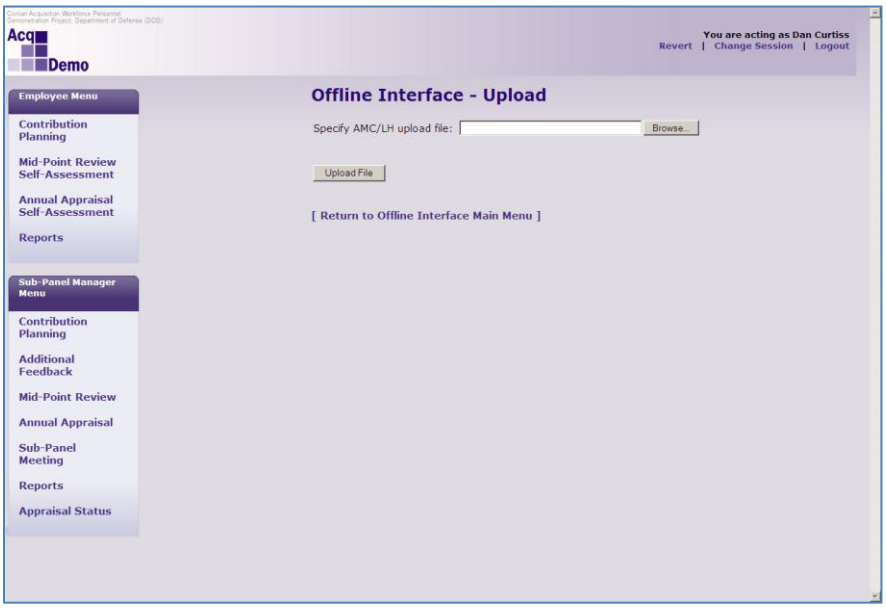


Figure 7-10: Offline Interface – Upload Employee Data

“Upload Employee Data” parses an external text file produced by the CMS 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.

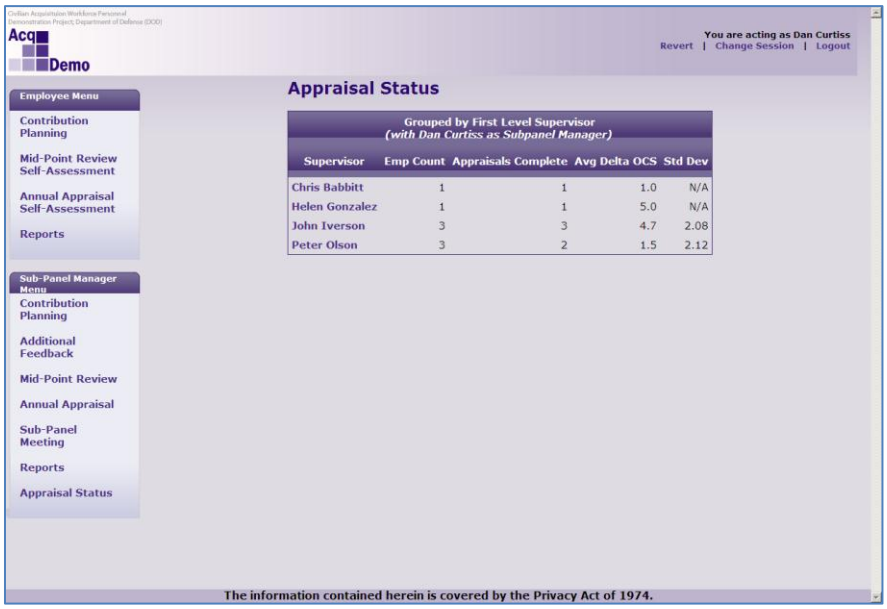


Figure 7-11: Sub-Panel Manager Appraisal Status

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 contribution factor.

Employees with Dan Curtiss as Subpanel Manager

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

Back

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

7.3 Reports

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

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

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

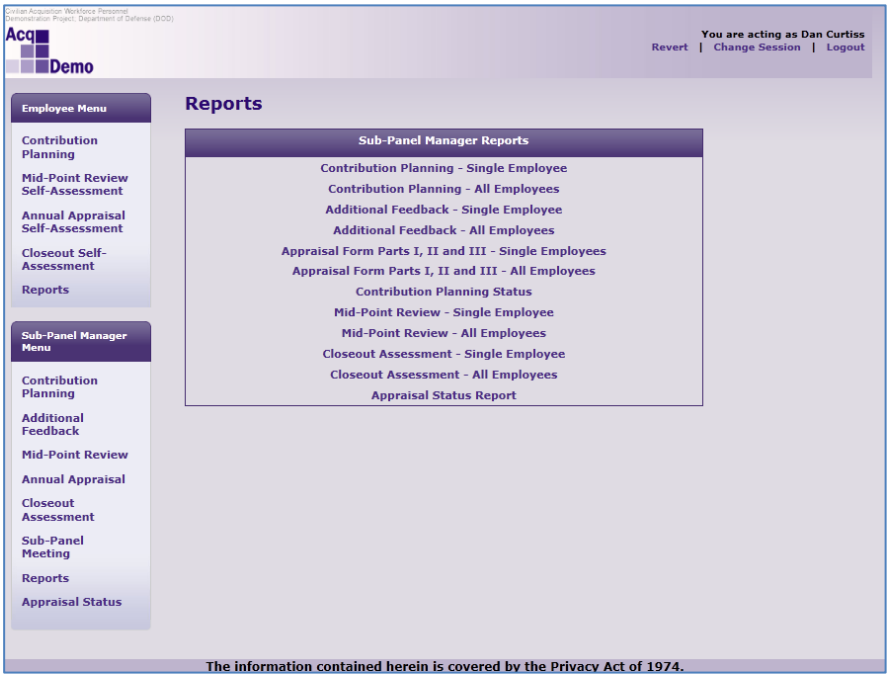


Figure 7-13: Sub-Panel Manager Reports Menu

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

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 contribution 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**, **Closeout 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**, **Annual Appraisal**, and **Closeout Assessment**.

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 contribution factor relative to others in the same career path and level of performance.

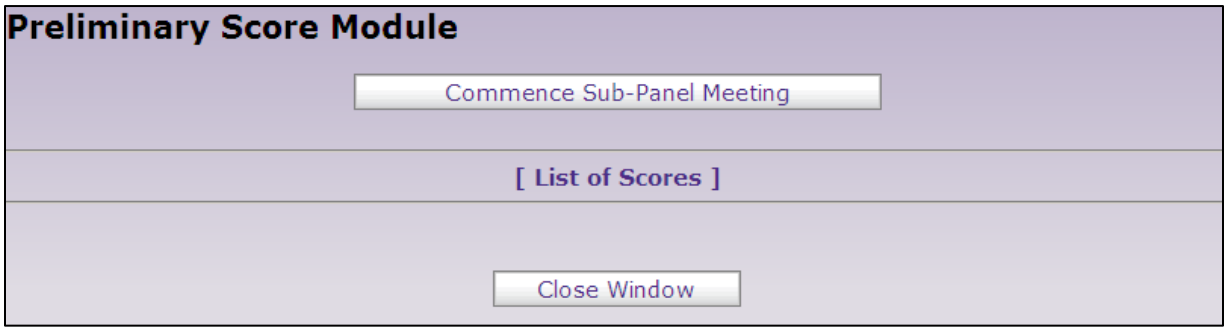
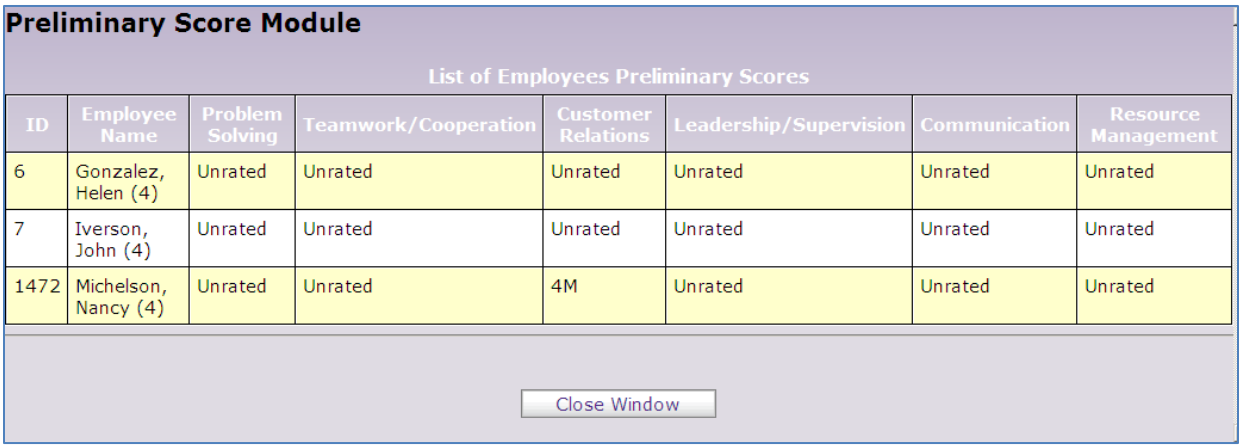


Figure 8-2: Preliminary (Categorical) Score Module "Selection" Menu

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.

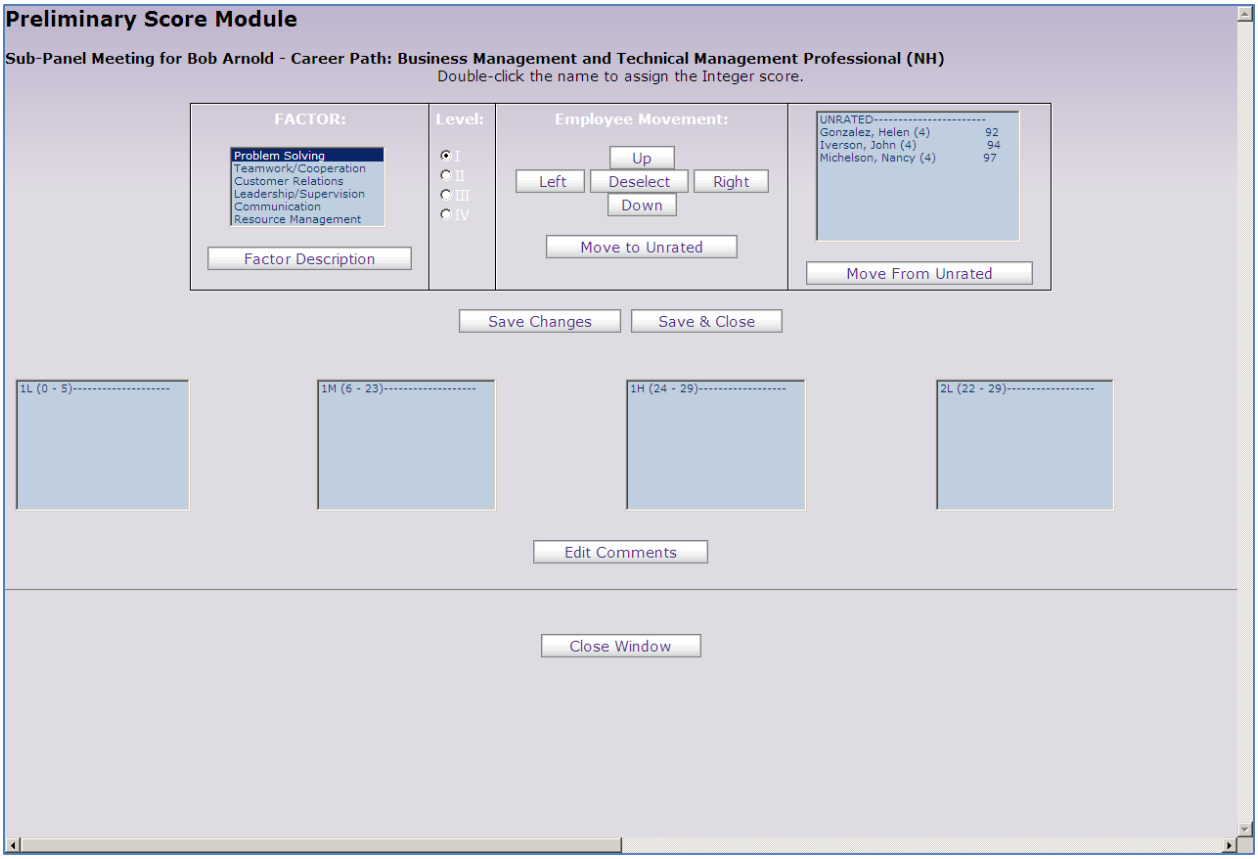


Figure 8-4: Preliminary (Categorical) Score Module Web Page

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 is 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.

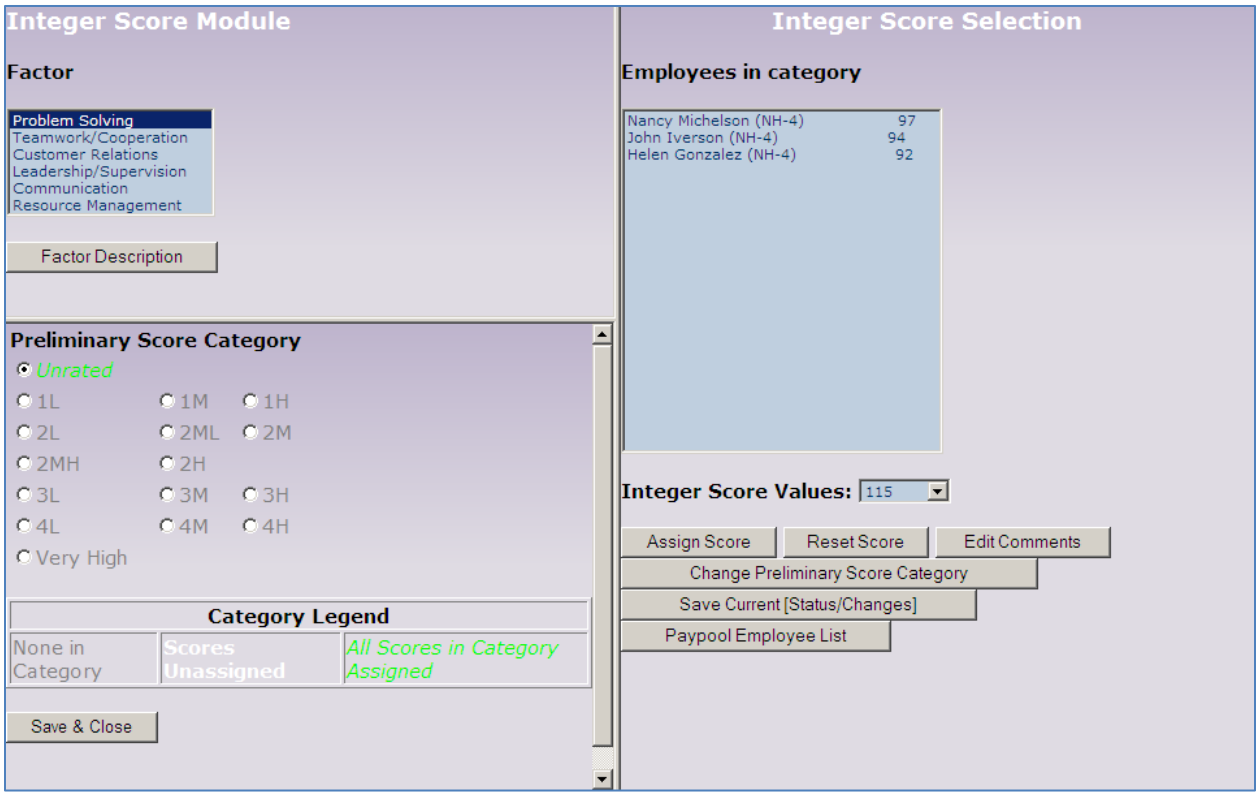


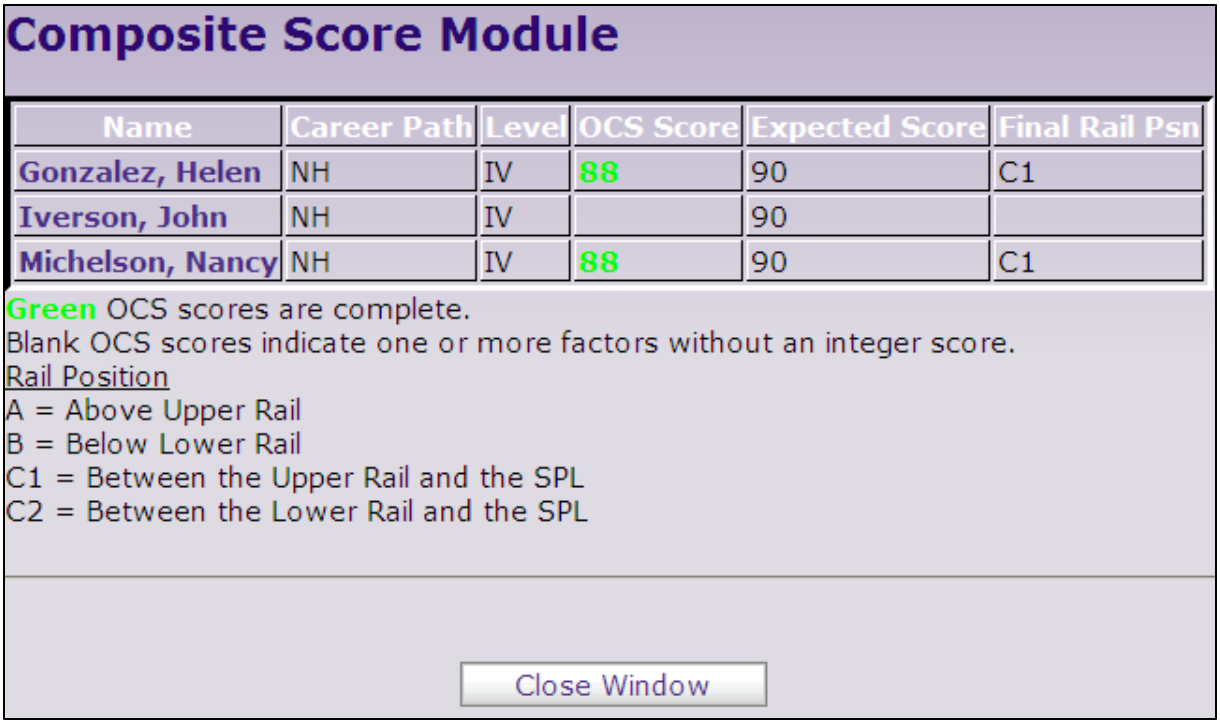
Figure 8-5: Sub-Panel Meeting Integer (Final) Score Module Web Page

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 contribution 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 contribution factors. All employees and their corresponding OCS scores are displayed in this list.
From the Sub-Panel Meeting menu page, click "Composite Score Module'.



Composite Score Module

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

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

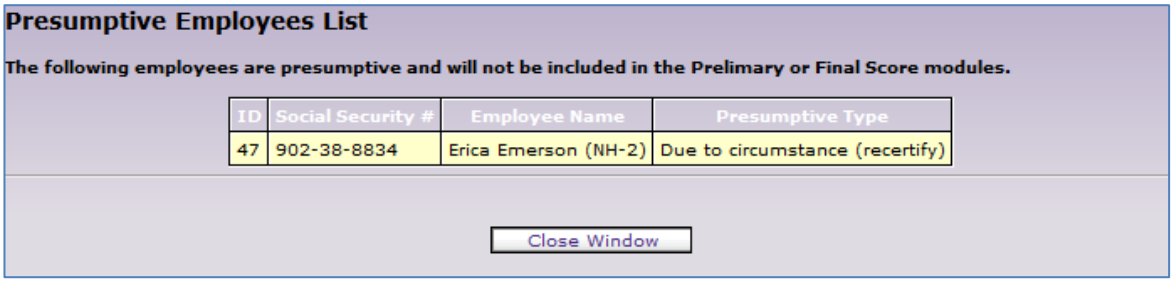
Close Window

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 Prelimary or Final Score modules.

ID	Social Security #	Employee Name	Presumptive Type
47	902-38-8834	Erica Emerson (NH-2)	Due to circumstance (recertify)

Close Window

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.

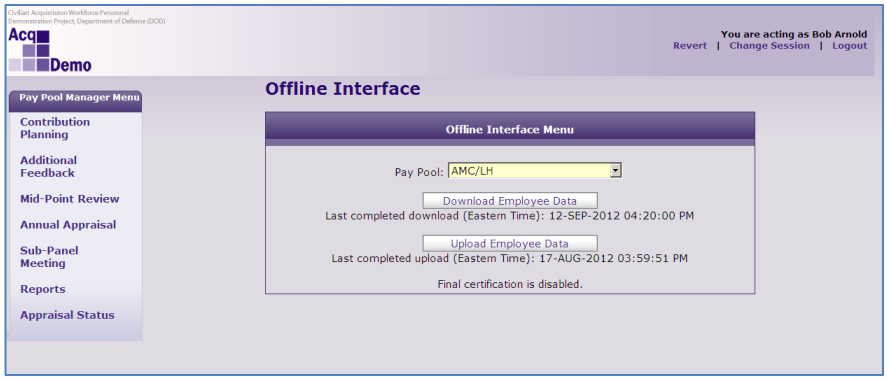


Figure 8-8: Sub Panel Meeting "Offline Interface" Menu

SUB-PANEL DOWNLOAD EMPLOYEE DATA

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

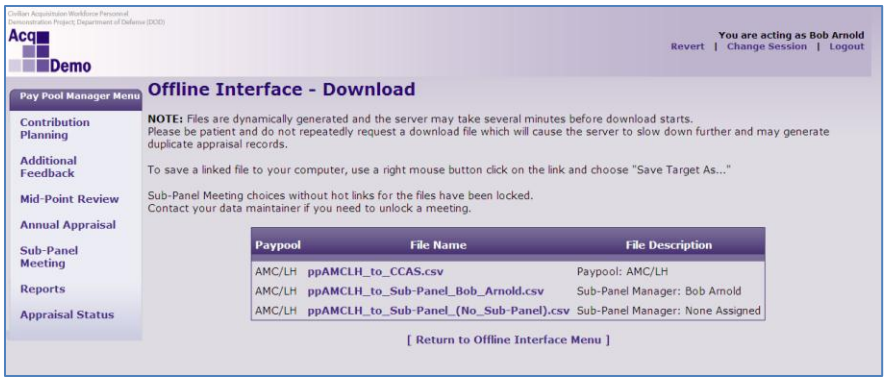


Figure 8-9: Offline Interface – Download Employee Data

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

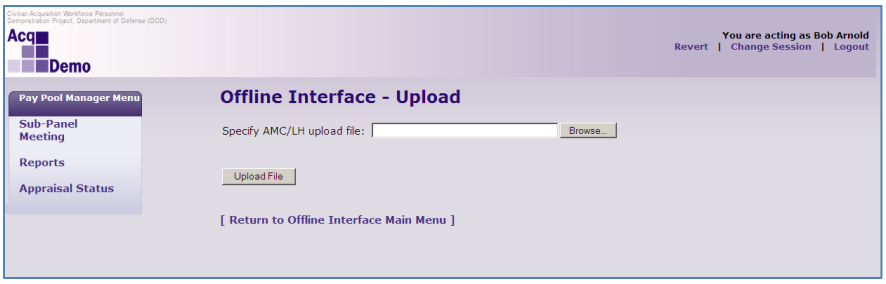


Figure 8-10: Offline Interface – Upload Employee Data

"Upload Employee Data" parses an external text file produced by the CMS Spreadsheet and updates the CAS2Net database with the file content.

8.2 Appraisal Status

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

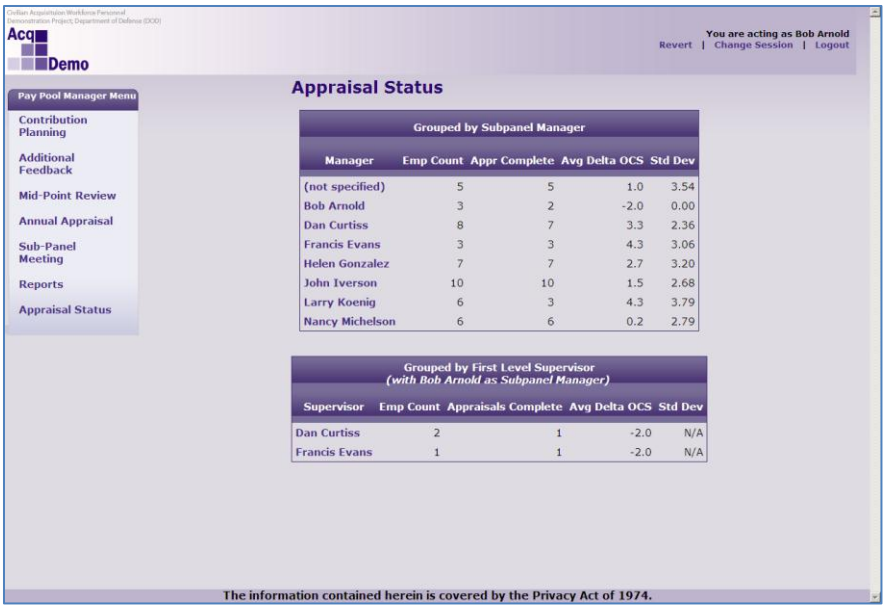
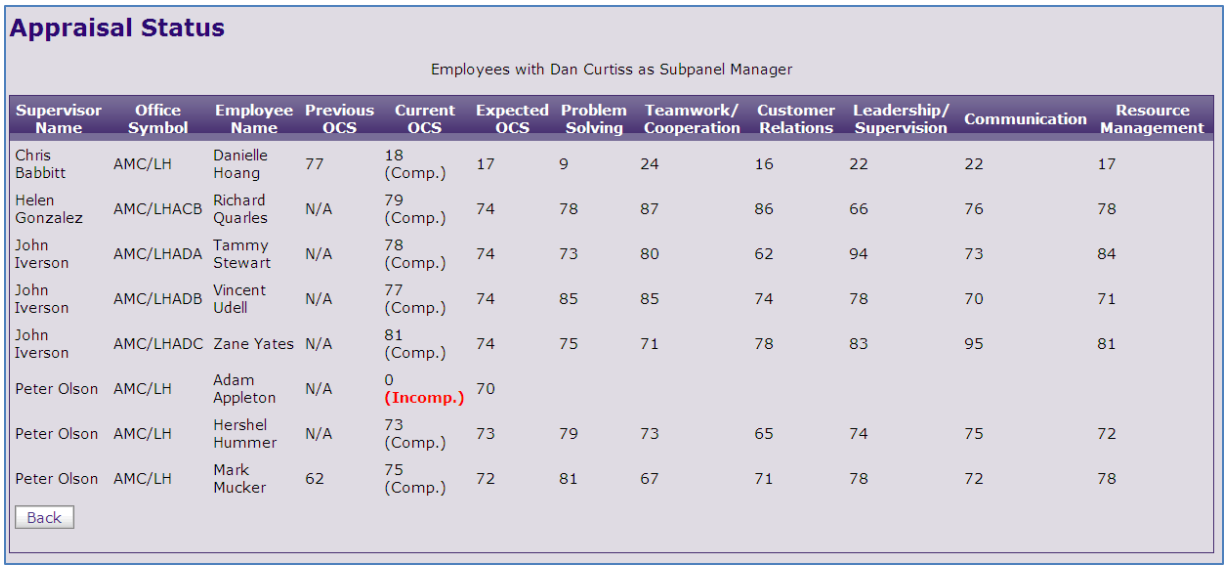


Figure 8-11: Pay Pool Manager Appraisal Status

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

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

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

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

8.3 Reports

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

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

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

Figure 8-13: Pay Pool Manager Reports Menu

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

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**, **Closeout 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**, **Annual Appraisal**, and **Closeout Assessment.** 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 Subpanel or Pay Pool Managers. Locking the scores prevents updates after end of cycle activities have commenced.

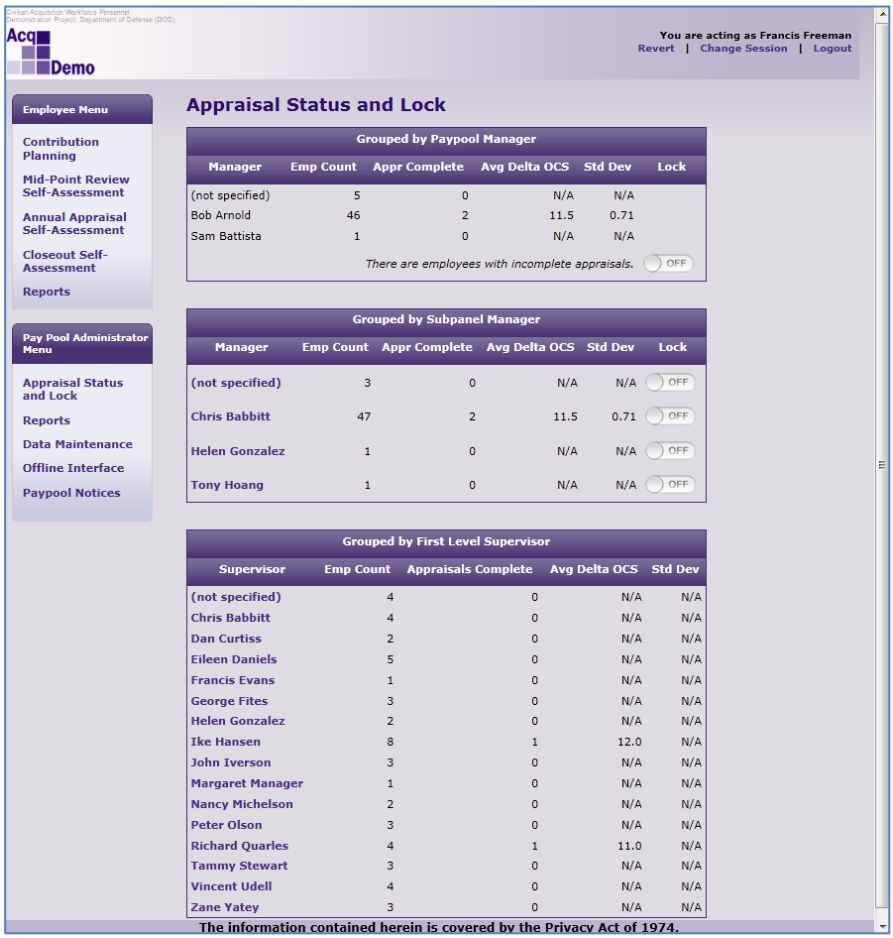


Figure 9-1: Pay Pool Administrator - Appraisal Status and Lock

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 contribution 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 I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster by Employee
- Supervisor Roster by Supervisor
- Zone A/CIP Report

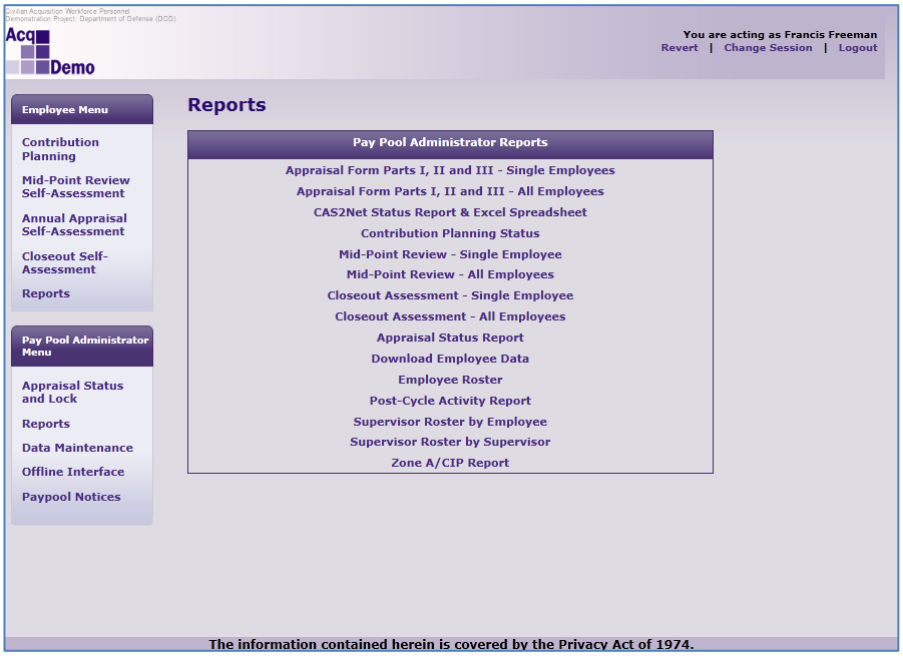


Figure 9-2: Pay Pool Administrator Reports Menu

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

EMPLOYEE ROSTER

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

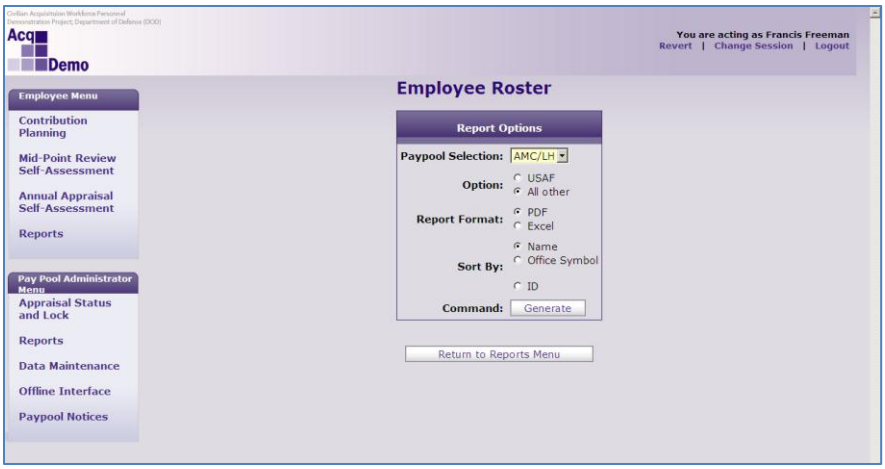
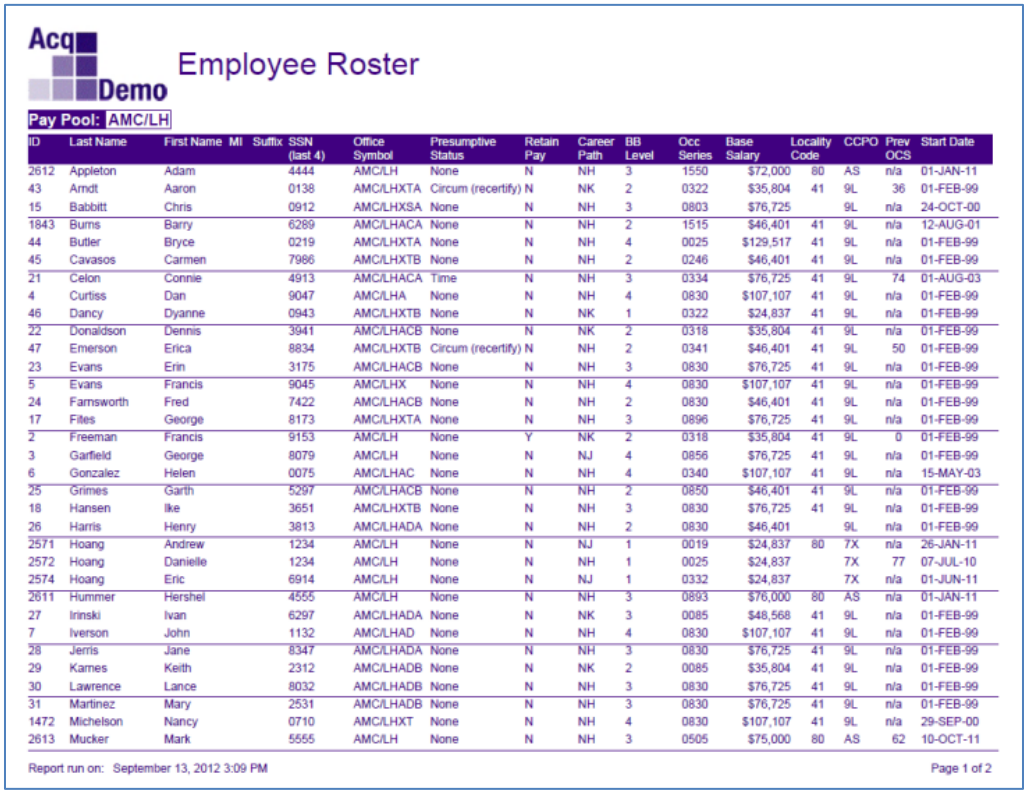


Figure 9-3: Employee Roster Report Generation Options

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

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



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
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	Fites	George			8173	AMC/LHXTA	None	N	NH	3	0896	$76,725	41	9L	n/a	01-FEB-99
2	Freeman	Francis			9153	AMC/LH	None	Y	NK	2	0318	$35,804	41	9L	0	01-FEB-99
3	Garfield	George			8079	AMC/LH	None	N	NJ	4	0856	$76,725	41	9L	n/a	01-FEB-99
6	Gonzalez	Helen			0075	AMC/LHAC	None	N	NH	4	0340	$107,107	41	9L	n/a	15-MAY-03
25	Grimes	Garth			5297	AMC/LHACB	None	N	NH	2	0850	$46,401	41	9L	n/a	01-FEB-99
18	Hansen	Ike			3651	AMC/LHXTB	None	N	NH	3	0830	$76,725	41	9L	n/a	01-FEB-99
26	Harris	Henry			3813	AMC/LHADA	None	N	NH	2	0830	$46,401		9L	n/a	01-FEB-99
2571	Hoang	Andrew			1234	AMC/LH	None	N	NJ	1	0019	$24,837	80	7X	n/a	26-JAN-11
2572	Hoang	Danielle			1234	AMC/LH	None	N	NH	1	0025	$24,837		7X	77	07-JUL-10
2574	Hoang	Eric			6914	AMC/LH	None	N	NJ	1	0332	$24,837		7X	n/a	01-JUN-11
2611	Hummer	Hershel			4555	AMC/LH	None	N	NH	3	0893	$76,000	80	AS	n/a	01-JAN-11
27	Irinski	Ivan			6297	AMC/LHADA	None	N	NK	3	0085	$48,568	41	9L	n/a	01-FEB-99
7	Iverson	John			1132	AMC/LHAD	None	N	NH	4	0830	$107,107	41	9L	n/a	01-FEB-99
28	Jerris	Jane			8347	AMC/LHADA	None	N	NH	3	0830	$76,725	41	9L	n/a	01-FEB-99
29	Karnes	Keith			2312	AMC/LHADB	None	N	NK	2	0085	$35,804	41	9L	n/a	01-FEB-99
30	Lawrence	Lance			8032	AMC/LHADB	None	N	NH	3	0830	$76,725	41	9L	n/a	01-FEB-99
31	Martinez	Mary			2531	AMC/LHADB	None	N	NH	3	0830	$76,725	41	9L	n/a	01-FEB-99
1472	Michelson	Nancy			0710	AMC/LHXT	None	N	NH	4	0830	$107,107	41	9L	n/a	29-SEP-00
2613	Mucker	Mark			5555	AMC/LH	None	N	NH	3	0505	$75,000	80	AS	62	10-OCT-11

Report run on: September 13, 2012 3:09 PM

Page 1 of 2

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.

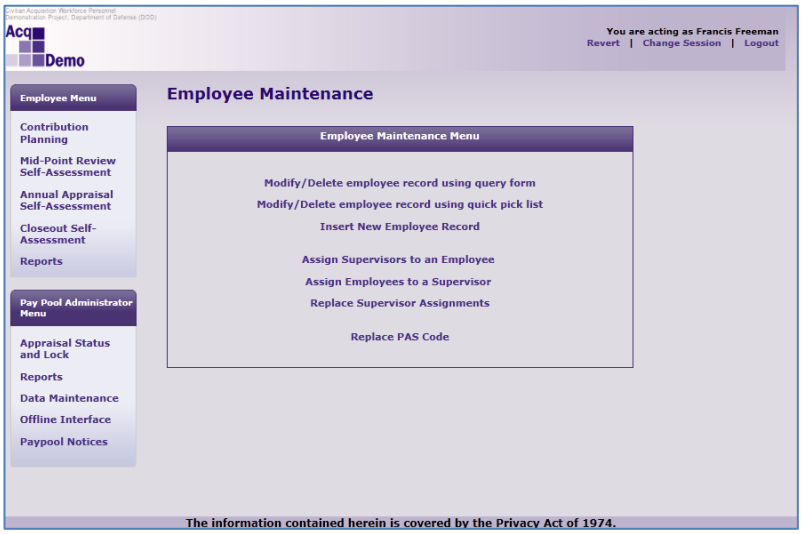


Figure 9-5: Data Maintenance – Employee Maintenance Menu

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 Acquisitulon Workforce Personnel
Demonstration Project; Department of Defense (DOD)

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)? 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

View

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

CCPO Code: Select One
Locality Code: Select One
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: *
AMC/LH
PAS Code (Air Force only):
Office Symbol:
LOV
Series: ***LOV***

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

Add Clear

[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

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.

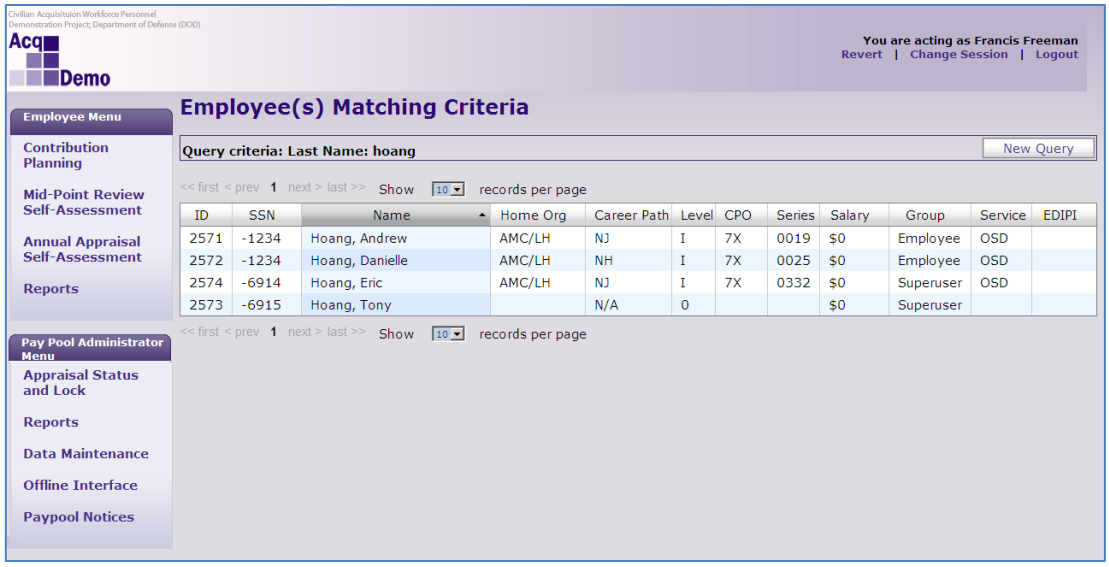


Figure 9-8: Search Employee Record Query Results

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.

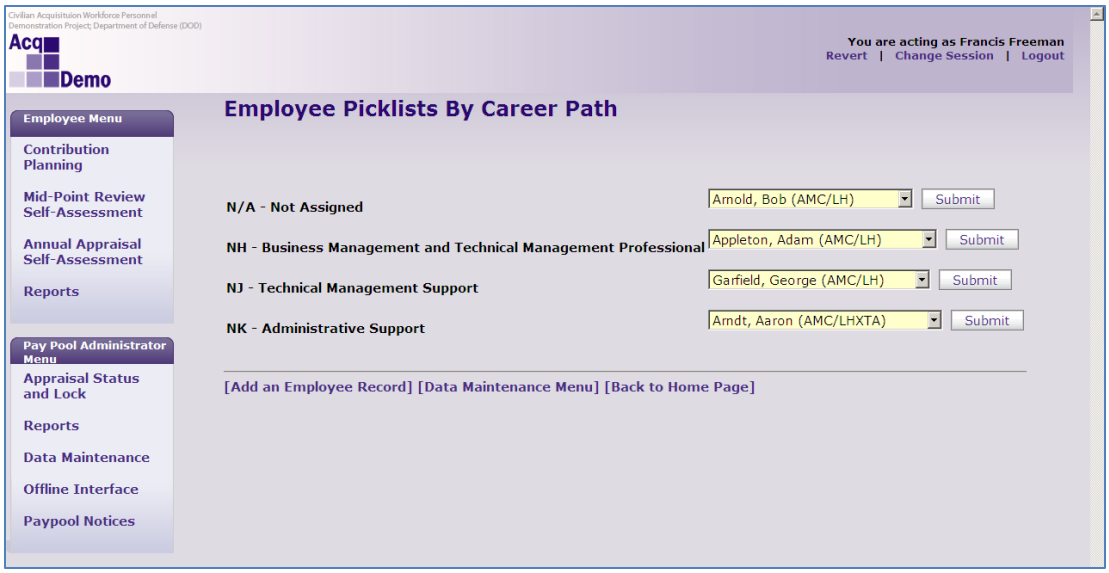


Figure 9-9: Modify/Delete Employee Record Using Quick Pick List

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

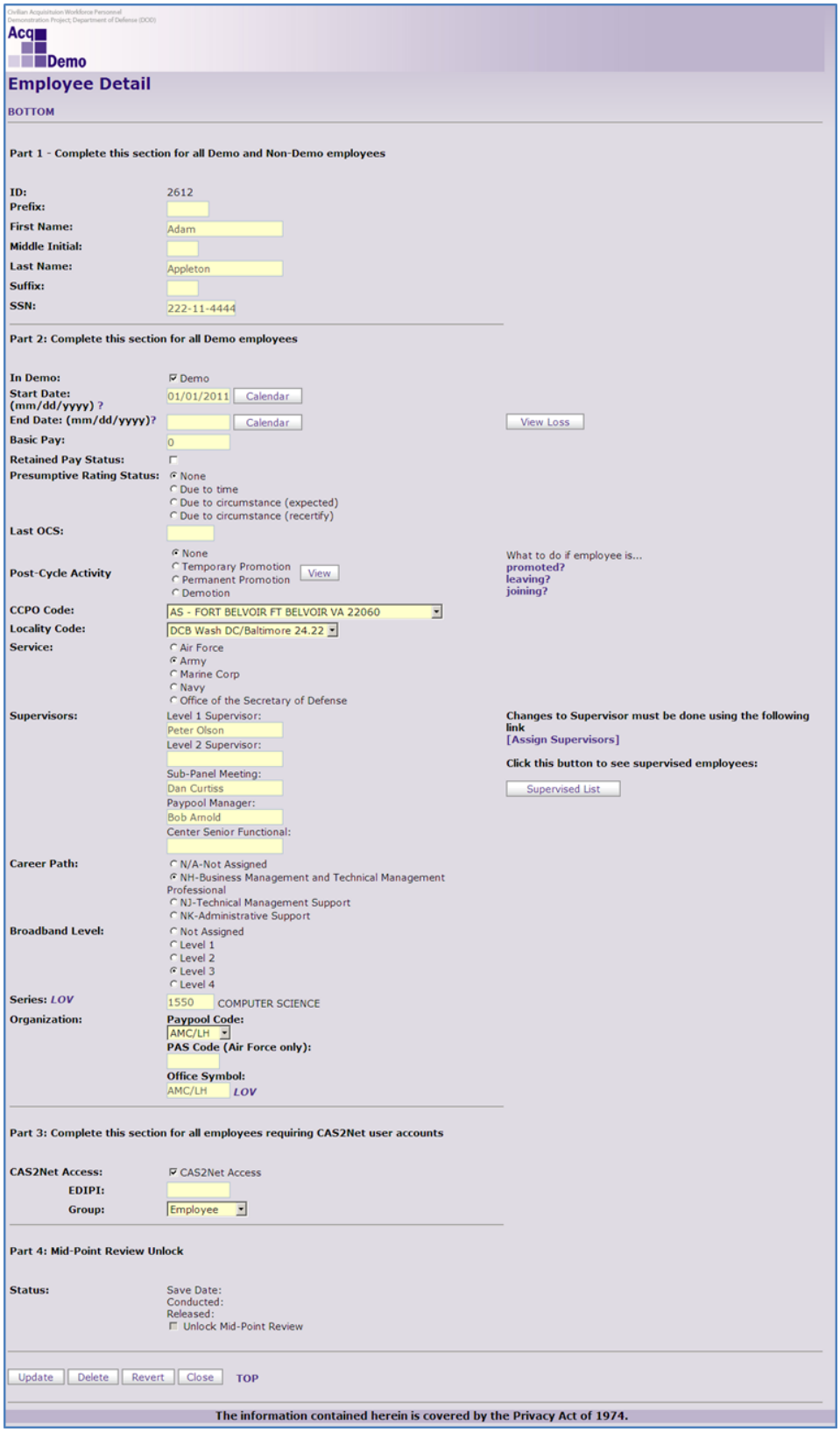


Figure 9-10: Employee Detail Web Form

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

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

Prefix
First Name
Middle Initial
Last Name
Suffix
SSN

Part 2: Complete this section for all Demo employees

In Demo *checkbox (check to indicate "Demo" employee status)*
Start Date *(date entered Acq Demo – mm/dd/yyyy selection via* ***Calendar*** *button)*
End Date *(date departed Acq Demo – mm/dd/yyyy updated via* ***Calendar****,* ***View Loss*** *buttons)*
Basic Pay *text field (for current fiscal year; does NOT include locality pay)*
Retained Pay Status *checkbox*
Presumptive Rating Status *radio buttons –*
None, Due to time, Due to circumstance (expected), Due to circumstance (recertify)
Last OCS *(if previous year OCS is available)*
Post-Cycle Activity *radio buttons and helpful hint links –*
None, Temporary Promotion, Permanent Promotion, Demotion
What to do if employee is… ***promoted?****,* ***leaving?****,* ***joining?***
CCPO Code *dropdown list*
Locality Code *dropdown list*
Service *radio buttons –*
Air Force, Army, Marine Corp, Navy, Office of the Secretary of Defense
Supervisors *name fields ("current year" supervisors entered via* ***Assign Supervisors*** *link) and list of subordinates –*
Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Meeting, Pay pool Manager, Center Senior Functional
Note. Center Senior Functional is a horizontal managerial review role by functional area rather than a vertical organizational hierarchy. A CSF reviews appraisals of assigned employees only through reports.
Click the ***Supervisor List*** *button to see supervised employees*
Career Path *radio buttons –*
N/A-Not Assigned, NH-Business Management and Technical Management Professional, NJ-Technical Management Support, NK-Administrative Support
Broadband Level *radio buttons –*
Not Assigned, Level 1, Level 2, Level 3, Level
Series *(click* ***LOV*** *(List of Values) 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 (List of Values) link to select from the list of Occupational Series values. New values entered for Supervisor Names and Office Symbol will be added to the list of values once the employee record is updated.

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

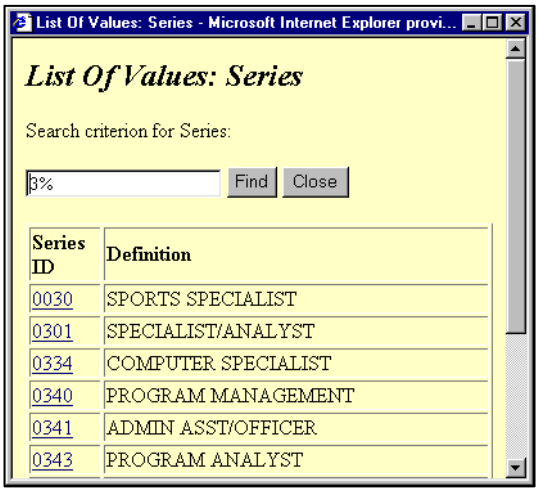


Figure 9-11: Occupational Series "List of Values"

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

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

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

Part 4: Mid-Point Review Unlock

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

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

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

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

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

9.3.3 Transfer Pay Pool

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

> **Note:** Special above-pay pool administrators such as All Army, All Air Force, MARCORSYSCOM 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.

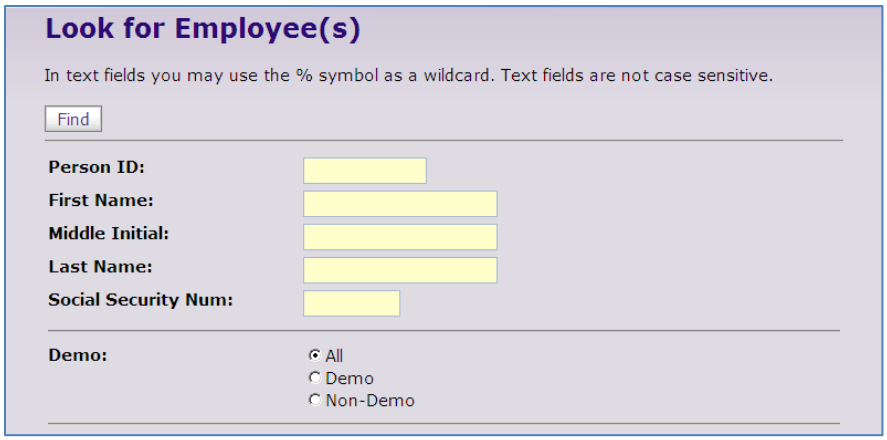


Figure 9-13: Transfer Pay Pool – Employee Search Query Form

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).

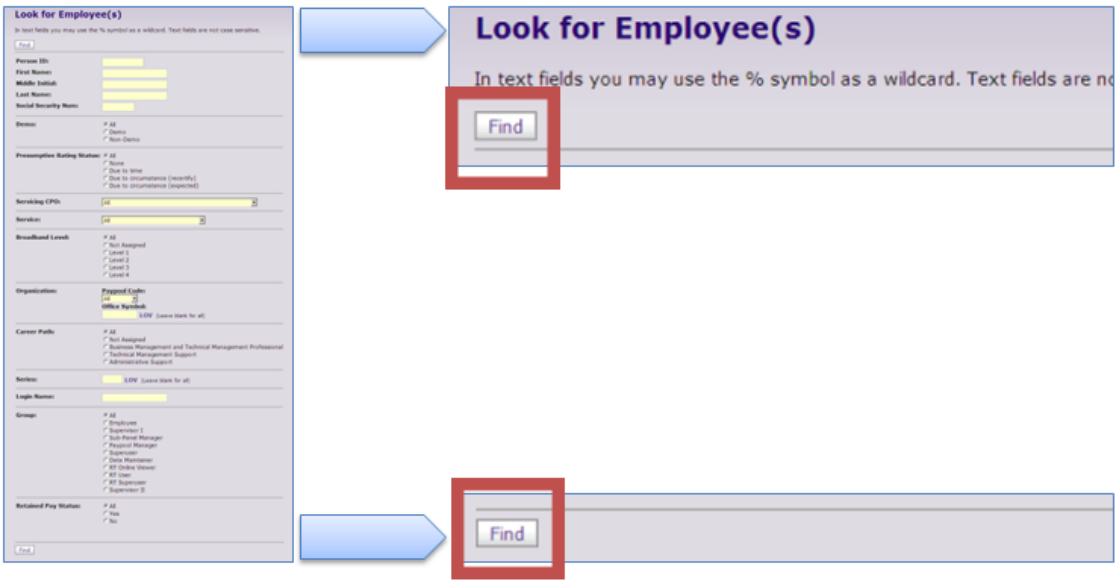


Figure 9-14: Transfer Pay Pool – Employee Search “Find” buttons

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.

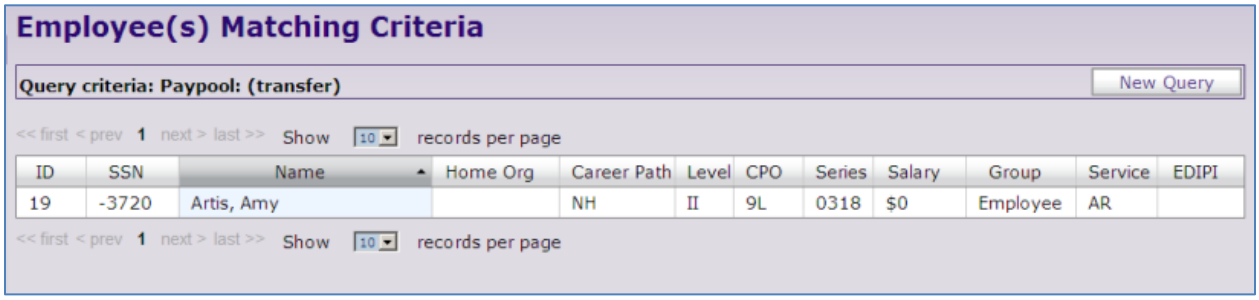


Figure 9-15: Transfer Pay Pool – Search Results

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

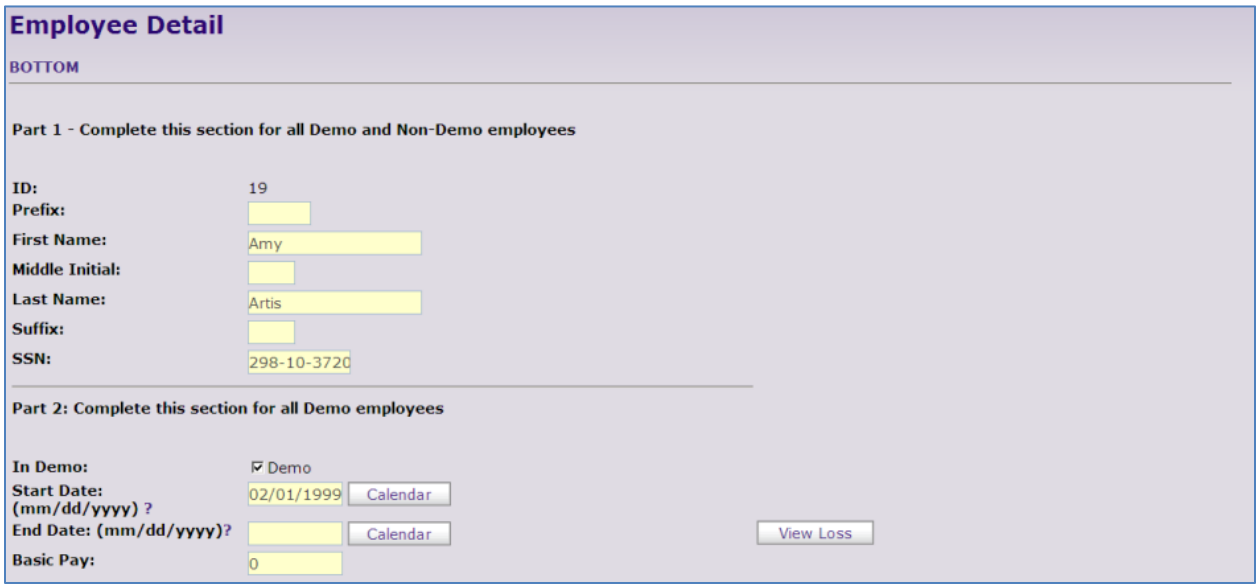


Figure 9-16: Transfer Pay Pool – Employee Detail Input

Scroll down to the "Organization" section of the Employee Detail Form and select the "Pay Pool Code" dropdown list.

Choose the "(Transfer)" pay pool to move the employee out of the current pay pool.

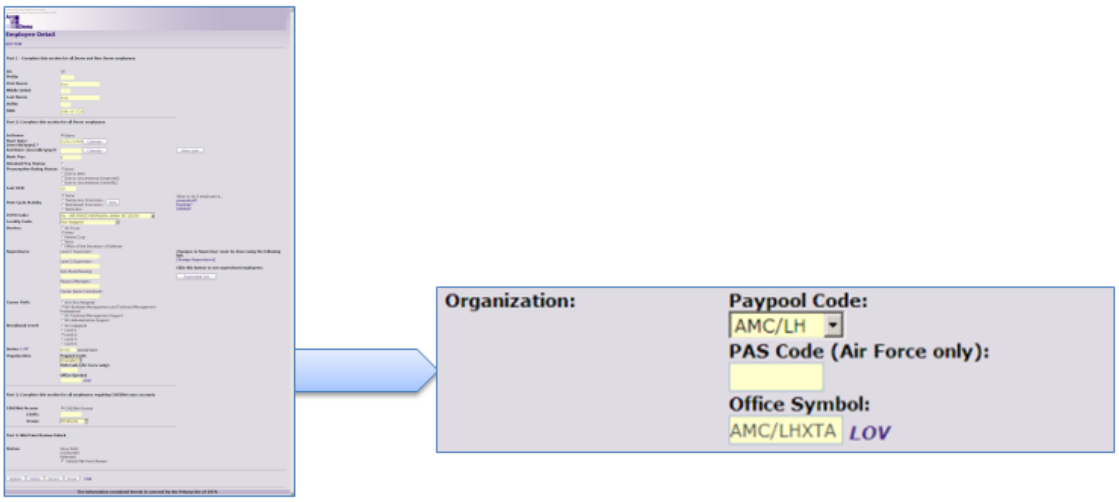


Figure 9-17: Transfer Pay Pool – "To" Pay Pool Selection

Click the "Update" button located at the bottom of the screen.

CAS2Net displays a message at the top of the Employee Detail screen indicating successful updates.

Click the "Close" button at the bottom of the Employee Detail Screen.

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

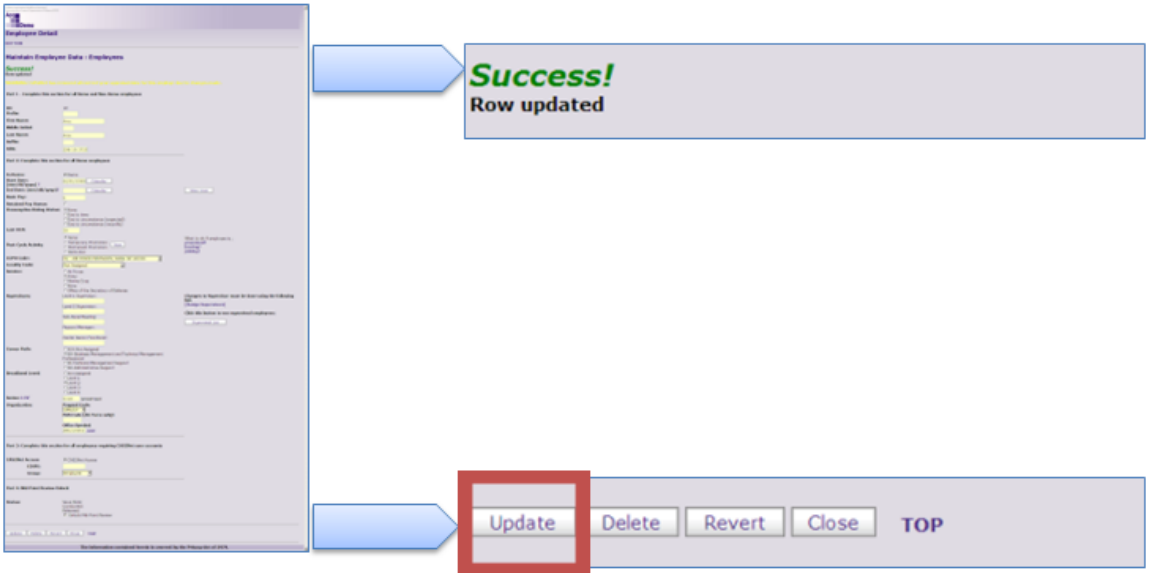


Figure 9-18: Transfer Pay Pool – Employee Detail Update

THE EMPLOYEE'S NEW PAY POOL ADMINISTRATOR:

Start by clicking "Data Maintenance" from the navigation bar.

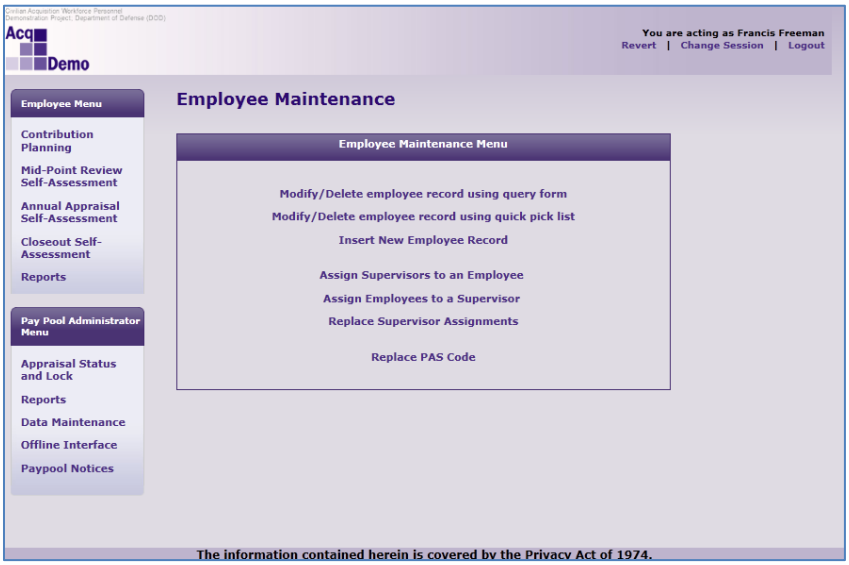


Figure 9-19: Transfer Pay Pool – Data Maintenance Menu

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

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

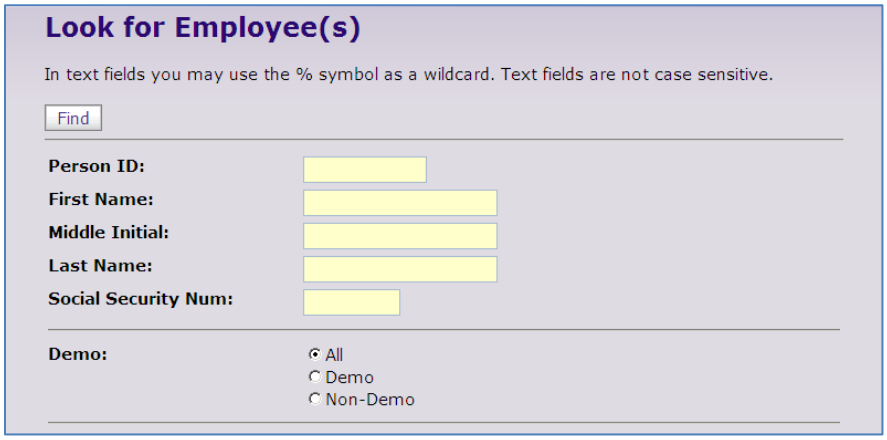


Figure 9-20: Transfer Pay Pool – Employee Search Query Form

Enter the name of the employee you want to find—or leave blank to retrieve all employees in the Transfer Pay Pool.

Scroll to the “Organization” section of the form and select “(transfer)” from the “Pay Pool Code” dropdown list.

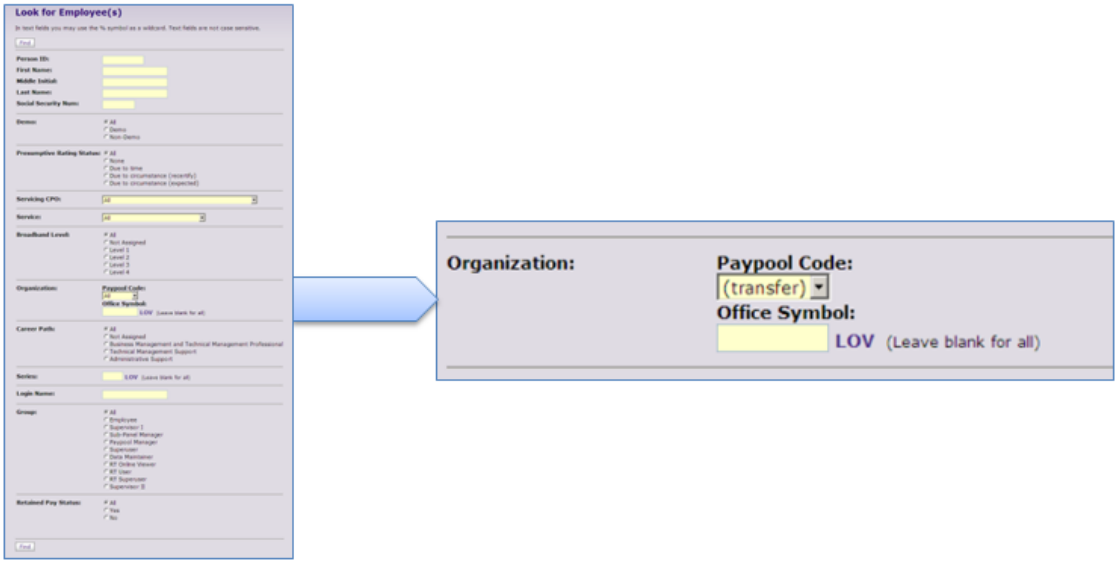


Figure 9-21: Transfer Pay Pool – Search by “From” Pay Pool

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

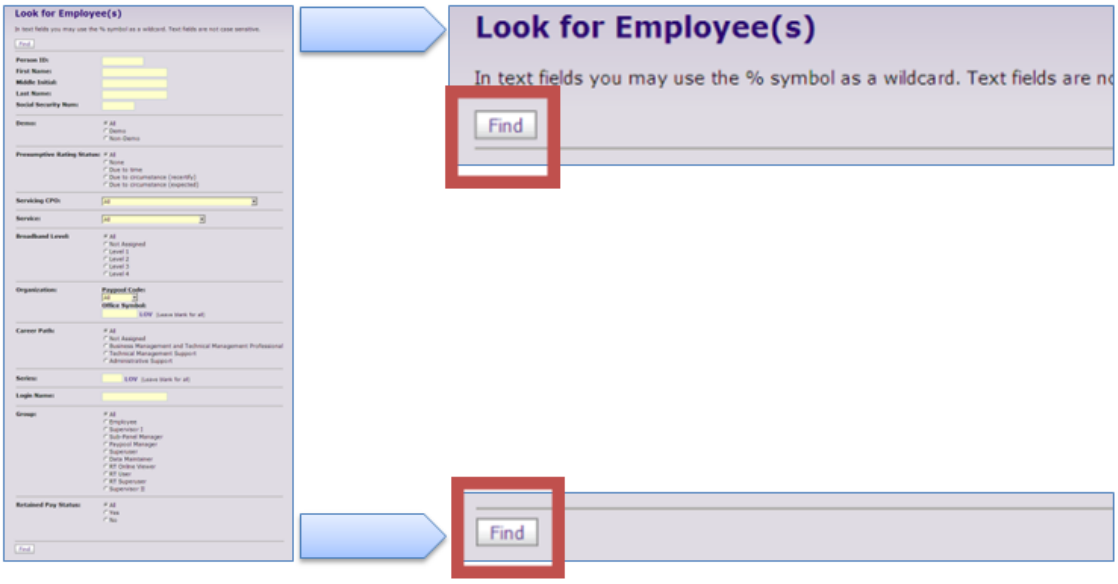


Figure 9-22: Transfer Pay Pool – Employee Search "Find" buttons

CAS2Net refreshes the screen to display a list of employees in the transfer pay pool. (This means the employee is waiting to be put into a pay pool and be given supervisor assignments)
Select an employee you would like to modify by clicking on their "ID" number.

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

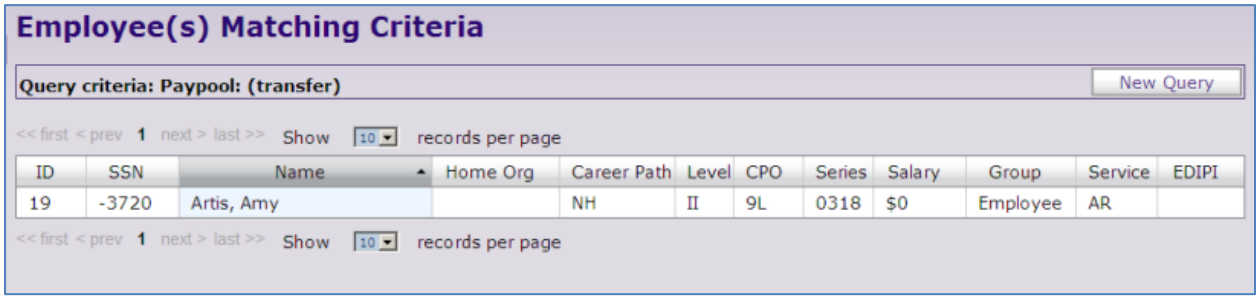


Figure 9-23: Transfer Pay Pool – Search Results

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

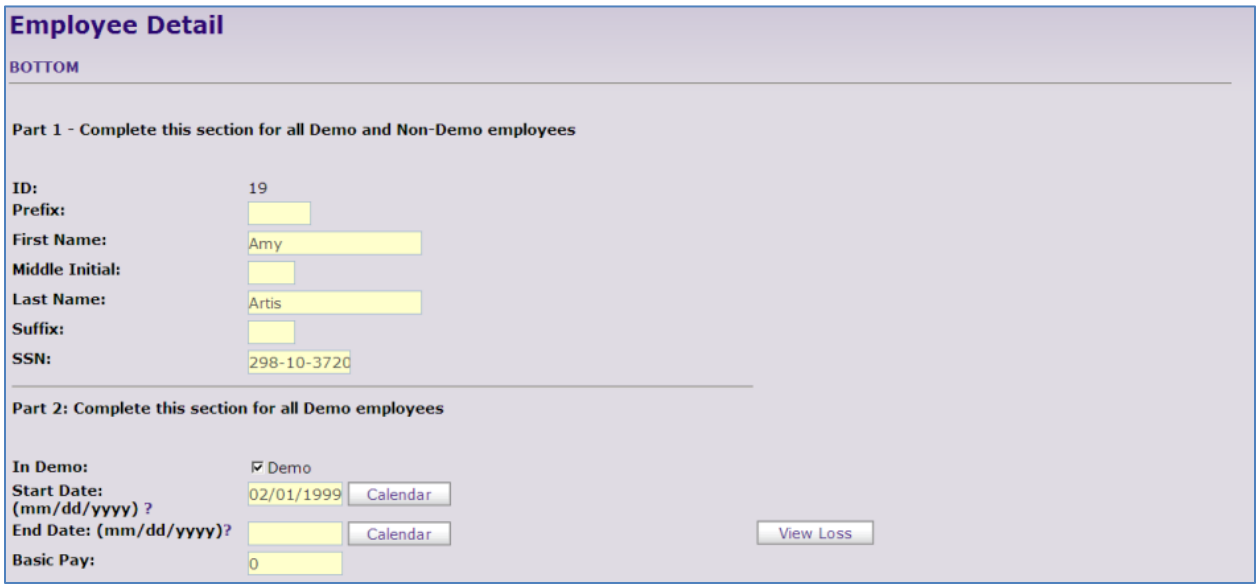


Figure 9-24: Transfer Pay Pool – Employee Detail Input

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.

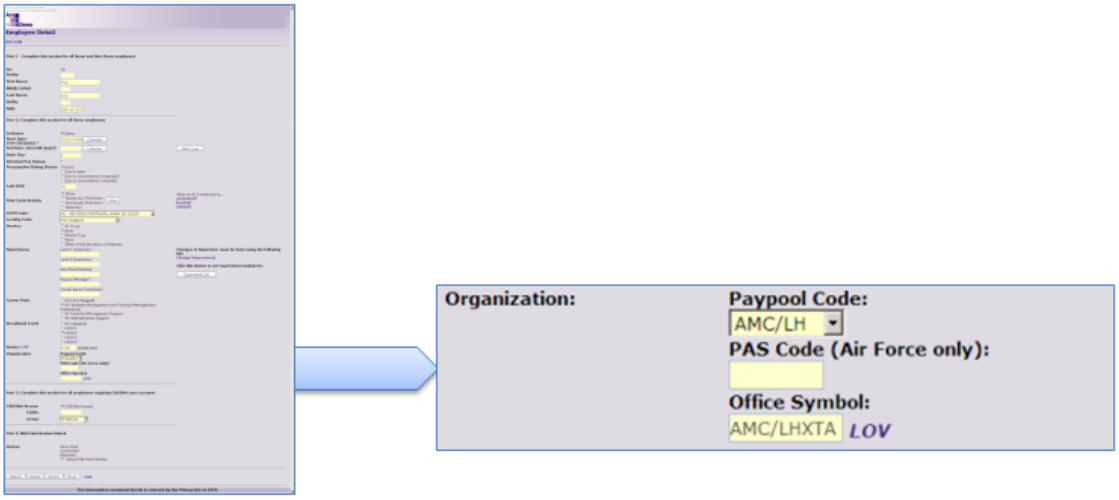


Figure 9-25: Transfer Pay Pool – "To" Pay Pool Selection

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.

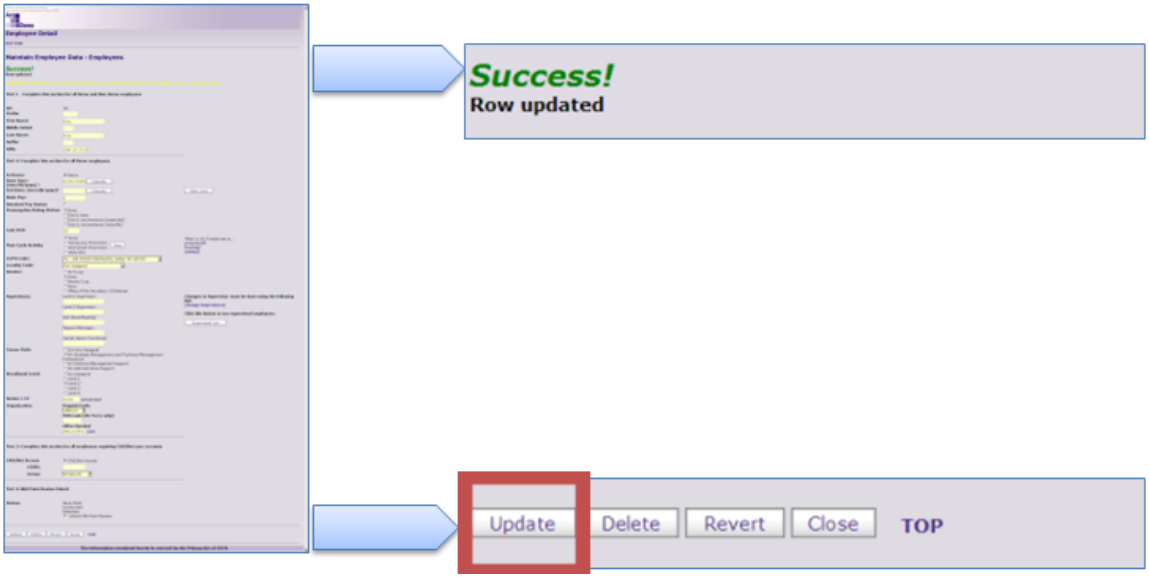


Figure 9-26: Transfer Pay Pool – Employee Detail Update

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.

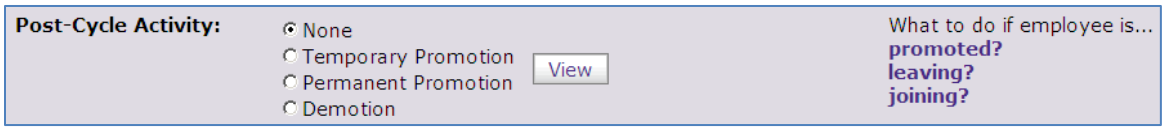


Figure 9-27: "Post-Cycle Activity" in Part II of Employee Detail Screen

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?**.

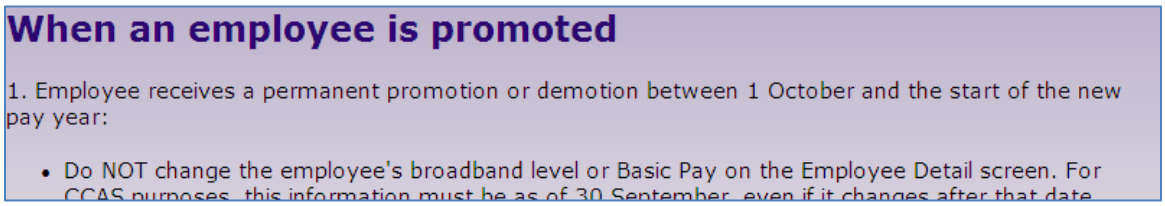


Figure 9-28: What to do if employee is … promoted?

CAS2Net provides these guidelines to follow 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.
   - 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.
2. Employee receives a permanent promotion or demotion on or before 30 September:
   - Simply update the relevant information on the Employee Detail screen.
3. Employee will be serving on a Temporary Promotion at the start of the new pay year, regardless of when that Temporary Promotion started:
   - Do NOT change any information on the Employee Detail screen. This must reflect the employee's permanent broadband and permanent basic pay as of 30 September even if the employee is actually serving in a higher broadband at a higher pay.

- Select the type of action (Temporary) under Post-Cycle Activity and click the View button. Enter the required information (start and end dates, temporary broadband, temporary basic pay, temporary occupational series, and temporary career path).
- CAS2Net will automatically ensure that the correct pay adjustment and award are uploaded to DCPDS.

For online guidance on managing departures, click What to do if employee is **leaving?**.

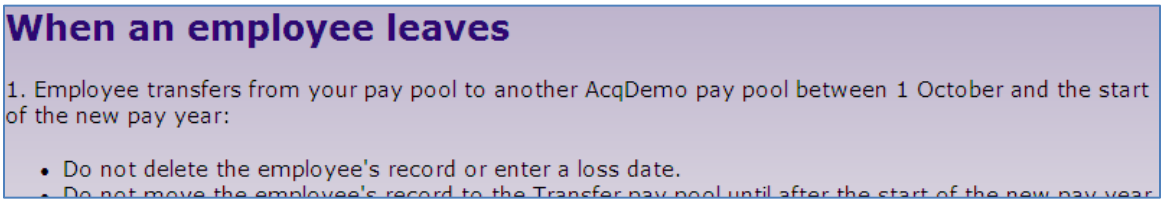


Figure 9-29: What to do if employee is … leaving?

CAS2Net provides these guidelines to follow when an employee is leaving:

1. Employee transfers from your pay pool to another AcqDemo pay pool between 1 October and the start of the new pay year:
   - Do not delete the employee's record or enter a loss date.
   - Do not move the employee's record to the Transfer pay pool until after the start of the new pay year. The employee will be rated by your pay pool and will receive a salary adjustment and award from your organization.
   - After the start of the new pay year, transfer the employee's record to the Transfer pay pool so the gaining pay pool data maintainer can pick it up and move it to the new pay pool. Notify the gaining data maintainer when this is done.
2. Employee leaves AcqDemo (retirement, separation, transfer to GS position, etc.) between 1 October and the start of the new pay year:
   - Enter the employee's End Date (first day not covered by AcqDemo) on the Employee Detail screen, click the View Loss button, and enter a reason for the loss.
   - Do not delete the employee's record until after the start of the new pay year. Since the employee was in your pay pool on 30 September, he or she must still be rated.
   - After the start of the new pay year, delete the employee's record from CAS2Net.
3. Employee leaves AcqDemo (retirement, separation, transfer to GS position, etc.) before 30 September:
   - Enter the employee's End Date (first day not covered by AcqDemo) on the Employee Detail screen, click the View Loss button, and enter a reason for the loss.
   - Delete the employee's record from CAS2Net.

For online guidance on how to handle new employees, click What to do if employee is **joining?**.

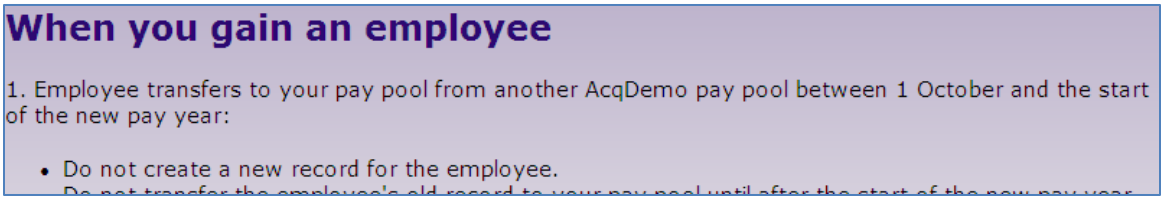


Figure 9-30: What to do if employee is … joining?

CAS2Net provides these guidelines to follow when an employee is leaving:

1. Employee transfers to your pay pool from another AcqDemo pay pool between 1 October and the start of the new pay year:
   - Do not create a new record for the employee.
   - Do not transfer the employee's old record to your pay pool until after the start of the new pay year. The employee will be rated by his or her previous pay pool and will receive a salary adjustment and award from that organization.
   - After the start of the new pay year, go to the Transfer pay pool and move the employee's record to your pay pool. If the record is not in the transfer pay pool, contact the employee's previous pay pool data maintainer and have them move the record to Transfer so you can pick it up.
2. Employee joins your pay pool from outside AcqDemo (new hire, transfer from GS positions, etc.) any time during the year:
   - Use Insert New Employee Record to add the employee to your CAS2Net database. Enter the employee's first day in AcqDemo as the Start Date. If the employee starts between 1 October and the start of the new pay year, they will not be included in the on-line and offline appraisal and compensation modules of CAS2Net for that cycle. However, CAS2Net will ensure that the employee receives the General Pay Increase.
   - If the employee is entering your pay pool due to a promotion, use the new promotion information at the employee detail page and do not enter a promotion.

POST-CYCLE ACTIVITIES

Post-cycle **losses** are recorded by following Path (1) to the Employee Detail screen and entering an End Date during the post-cycle period for the employee. Click "View Loss" to enter descriptive text.

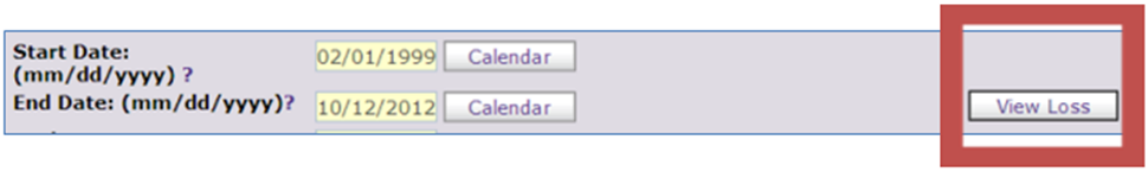


Figure 9-31: Record Post-Cycle "End Date"

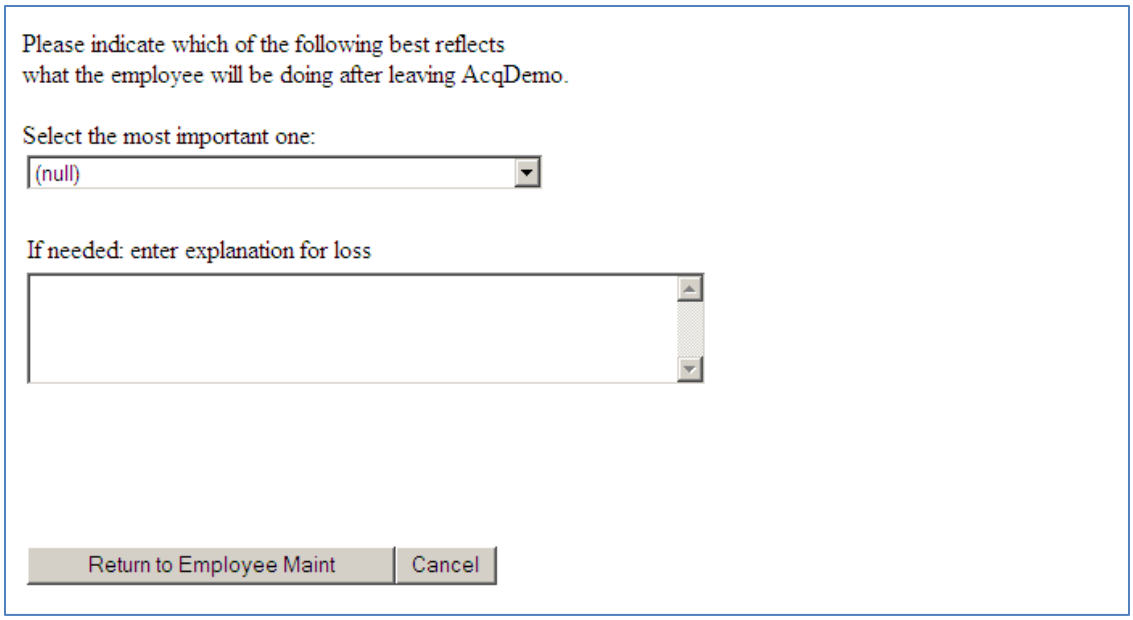


Figure 9-32: Record Post-Cycle Loss

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".

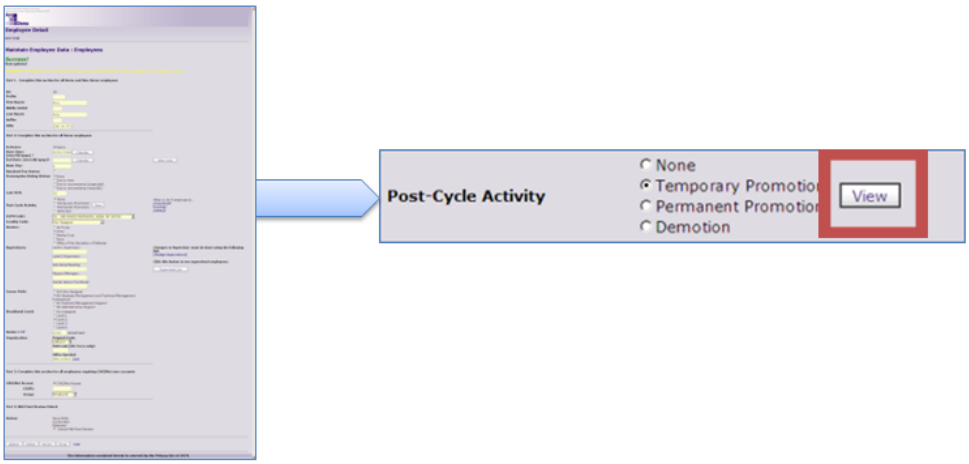


Figure 9-33: Record Post-Cycle Promotion

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.

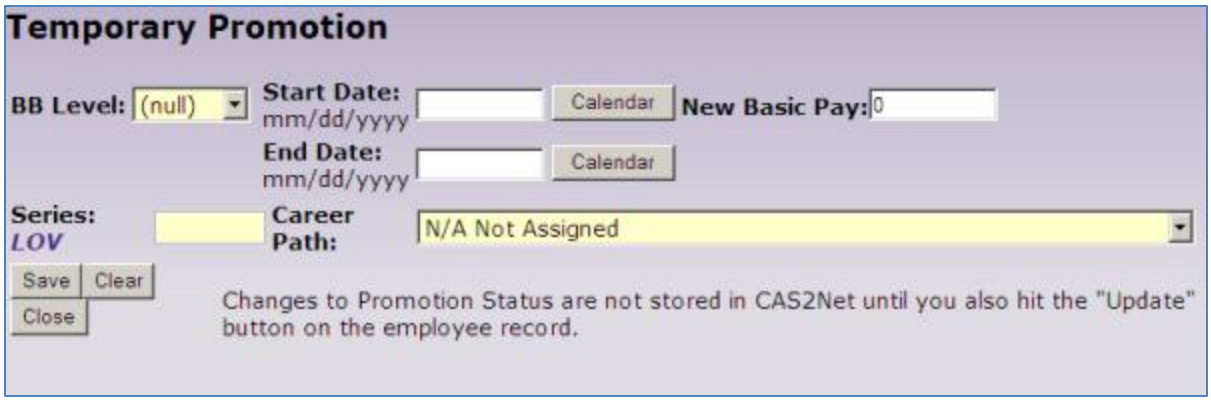


Figure 9-34: Temporary Promotion Web Form

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 CMS 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.

   10 digit EDIPI located in the User Name field, and can be copied

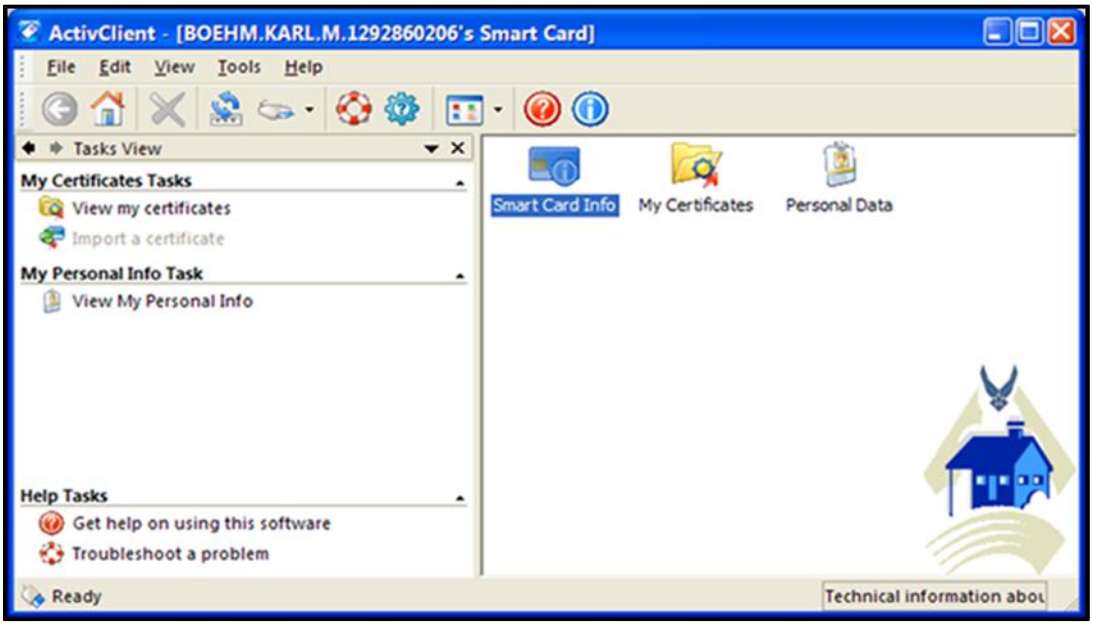


Figure 9-36: Smart Card Info Icon

4. Copy and send to Pay Pool Administrator to establish account

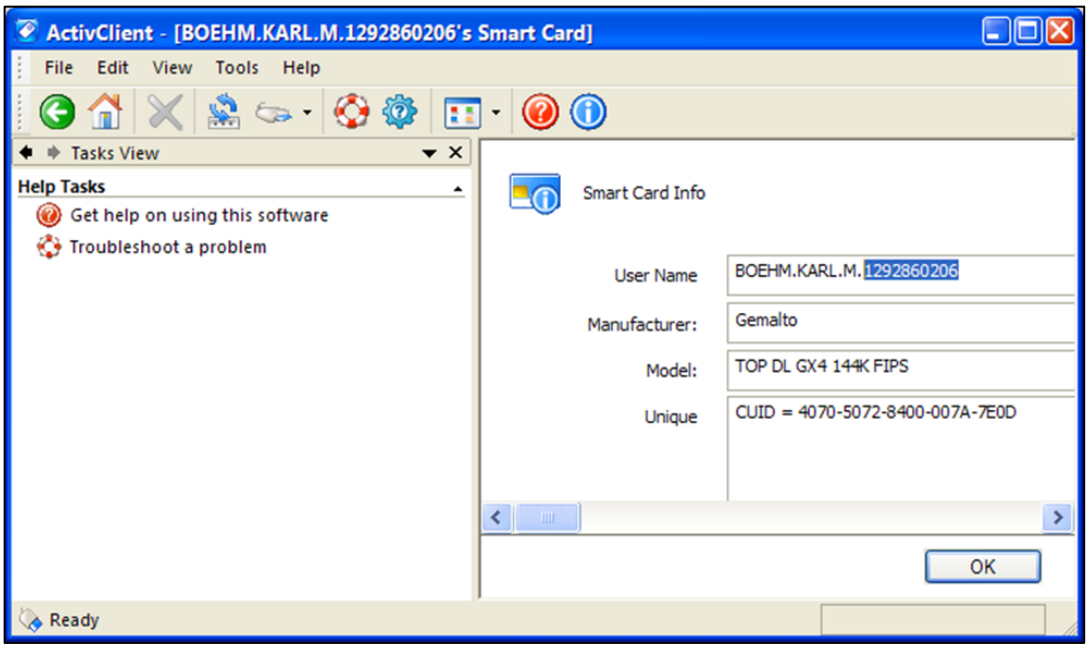


Figure 9-37: Smart Card Information Screen

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.

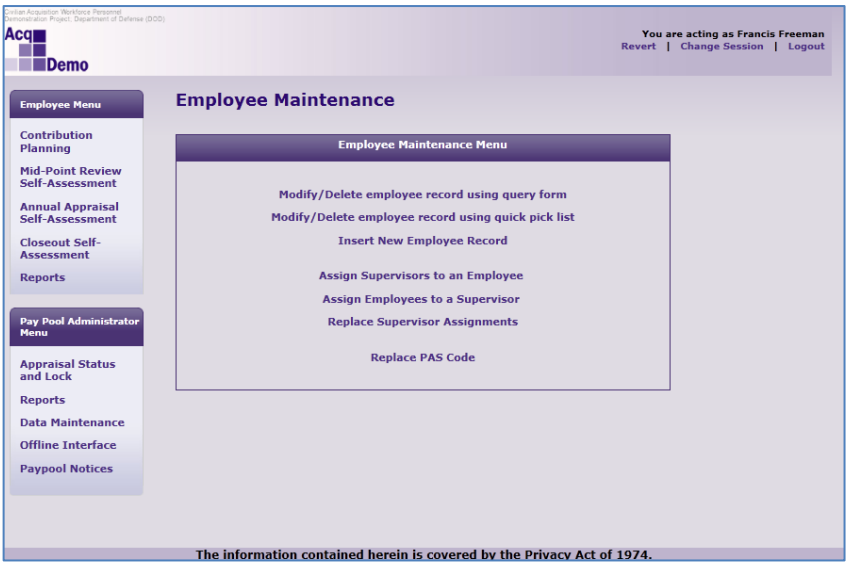


Figure 9-38: Insert New Employee Record Link

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.

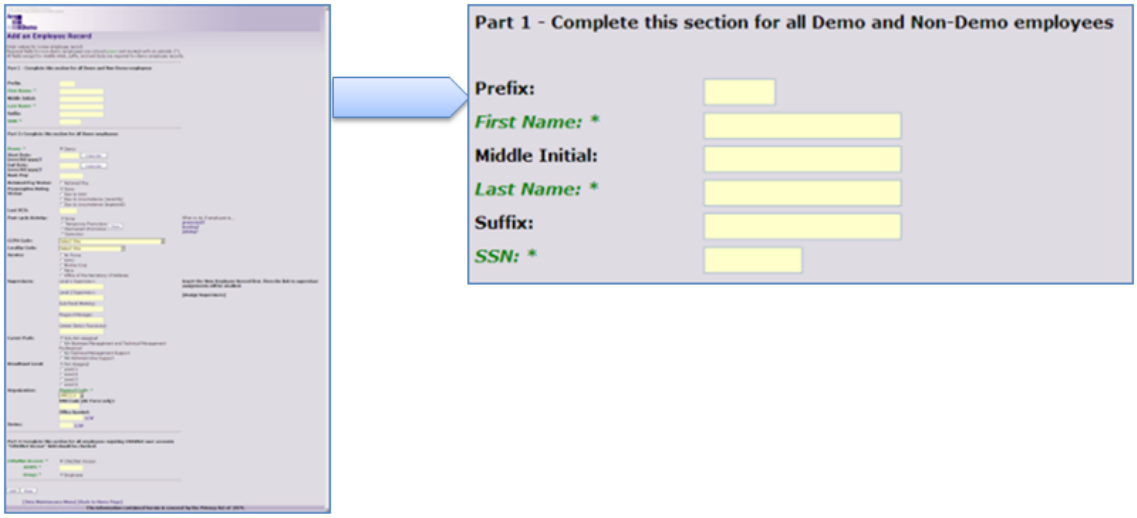


Figure 9-39: Add Employee Record – Part 1

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.

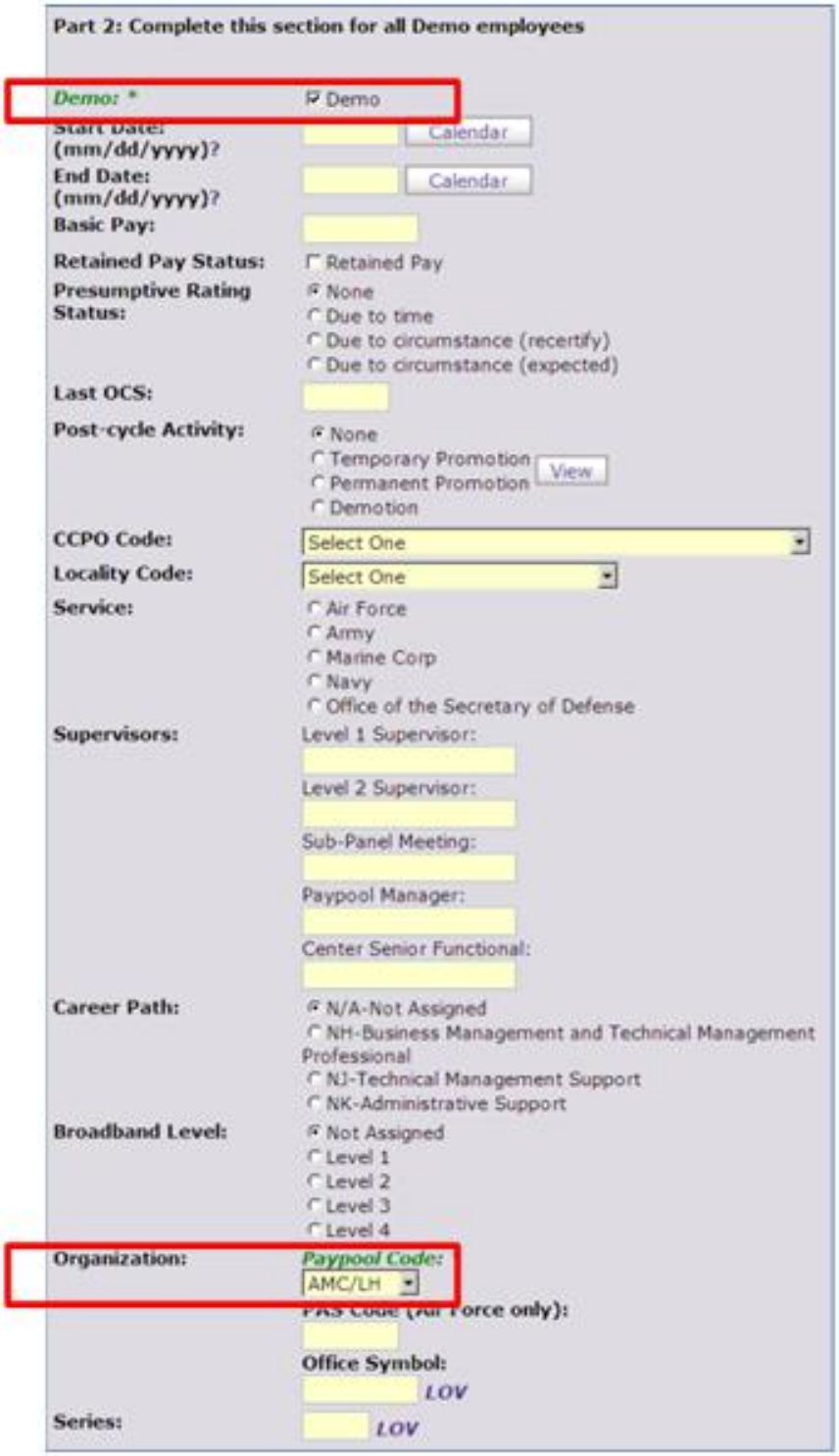


Figure 9-40: Add Employee Record – Part 2

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.

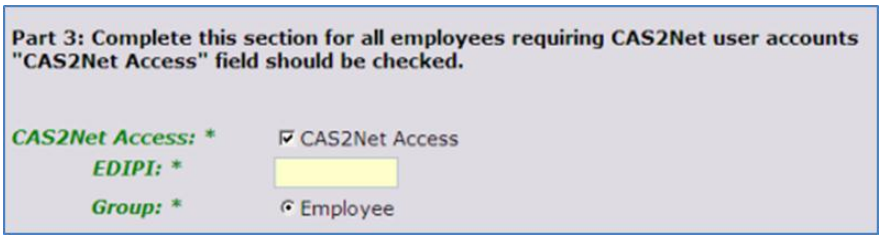


Figure 9-41: Add Employee Record – Part 3

CAS2Net refreshes the screen to display a successful update.
Confirms:

- The employee has been successfully inserted
- Employee's ID number
- SSN
- Name

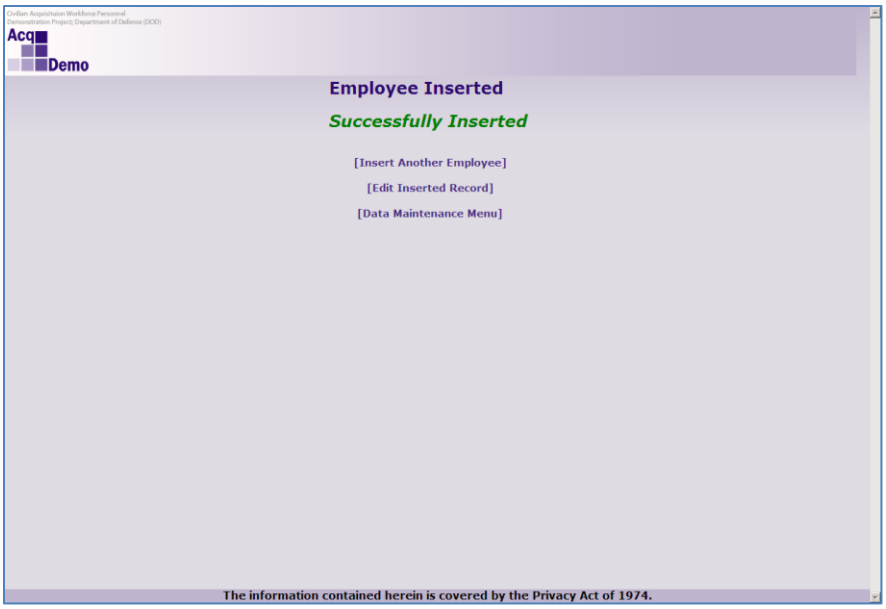


Figure 9-42: Add Employee Record Successful

9.3.6 Assign Supervisors to an Employee

To assign supervisors to an employee, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Assign Supervisors to an Employee” link.

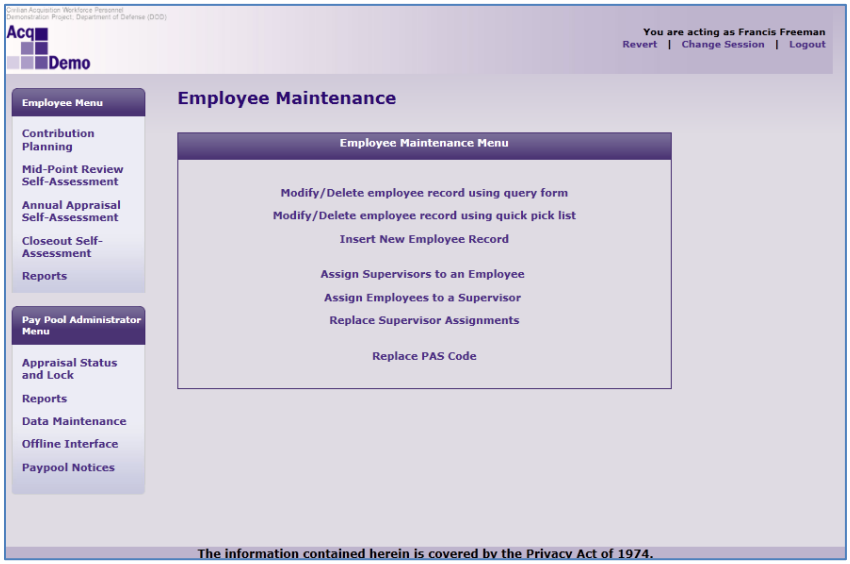


Figure 9-43: Assign Supervisors to an Employee Link

The Assign Supervisor to an Employee screen is displayed.

Select the supervisor assignment effective year—“current” or “next” (e.g. 2013 or 2014)—from the “Cycle Year” dropdown.

Select an employee’s name from the dropdown list.

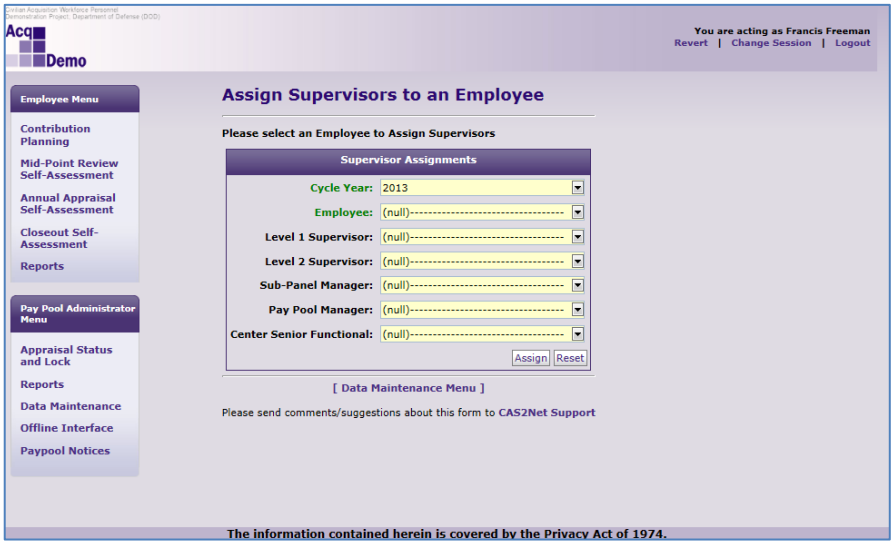


Figure 9-44: Assign Supervisors to an Employee Web Form

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

Select the desired supervisors to assign to the selected employee using the provided dropdown lists.

To undo selections made, and view the current supervisor assignments, click the “Reset” button.

Select the new supervisors to be assigned to the selected employee and click the “Assign” button.

Once you click the “Assign” button, CAS2Net displays the following message: “Supervisor(s) successfully assigned.”

If no supervisor assignments have been changed and the “Assign” button is clicked, the following message is displayed: “No supervisor changes made.”

Note that above pay pool superusers need to assign supervisors who are in a different pay pool than the employee using this module.

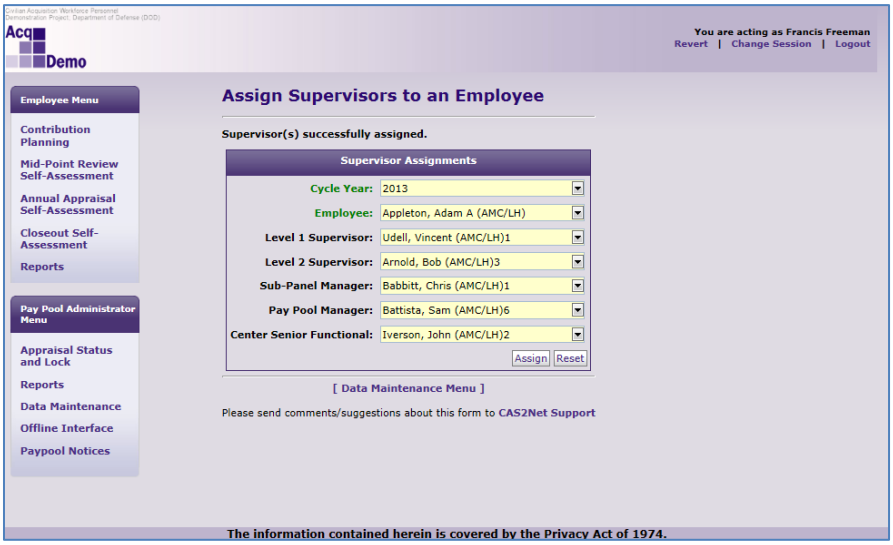


Figure 9-45: Assign Supervisors to an Employee Successful

“CURRENT YEAR” VERSUS “NEXT YEAR” SUPERVISOR ASSIGNMENTS

“Current year” supervisor assignments control all supervisor relationships for the active appraisal cycle and employee history access. “Next year” supervisor assignments are presumed unchanged—unless and until the pay pool administrator explicitly assigns another supervisor for the “next year”.

Figure 9-46: Assign “Next Year” Supervisors to an Employee

Only explicit “next year” assignments are stored in the CAS2Net database. Missing “next year” assignments are populated from the “current year” defaults.

Select the supervisors to be explicitly assigned for “next year” and click the “Assign” button. To remove a “next year” assignment, select the “current year” default from the dropdown list—e.g. “(2013 default: Bob Arnold)”.

Once you click the “Assign” button, CAS2Net displays the following message: “Supervisor(s) successfully assigned.”

If no supervisor assignments have been changed and the “Assign” button is clicked, the following message is displayed: “No supervisor changes made.”

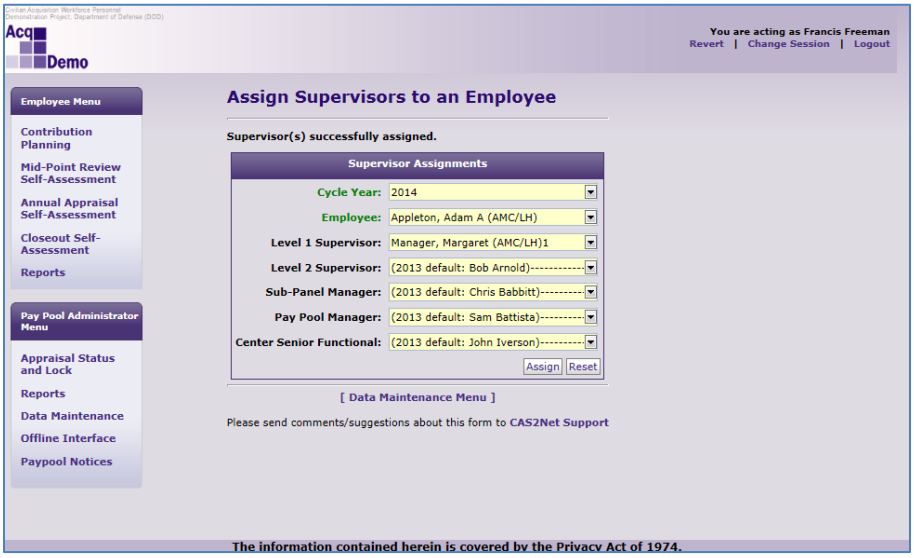


Figure 9-47: Assign “Next Year” Supervisors to an Employee Successful

9.3.7 Assign Employees to Supervisor

To assign employees to a supervisor, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Assign Employees to a Supervisor” link.

Figure 9-48: Assign Employees to Supervisor Link

The Assign Employees to a Supervisor screen is displayed.

Select a supervisor name from the dropdown list and select the supervisor role you want to assign (first level, sub-panel, or Pay Pool Manager).

Select the cycle year radio button—“current” or “next” (e.g. 2013 or 2014)

Figure 9-49: 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.

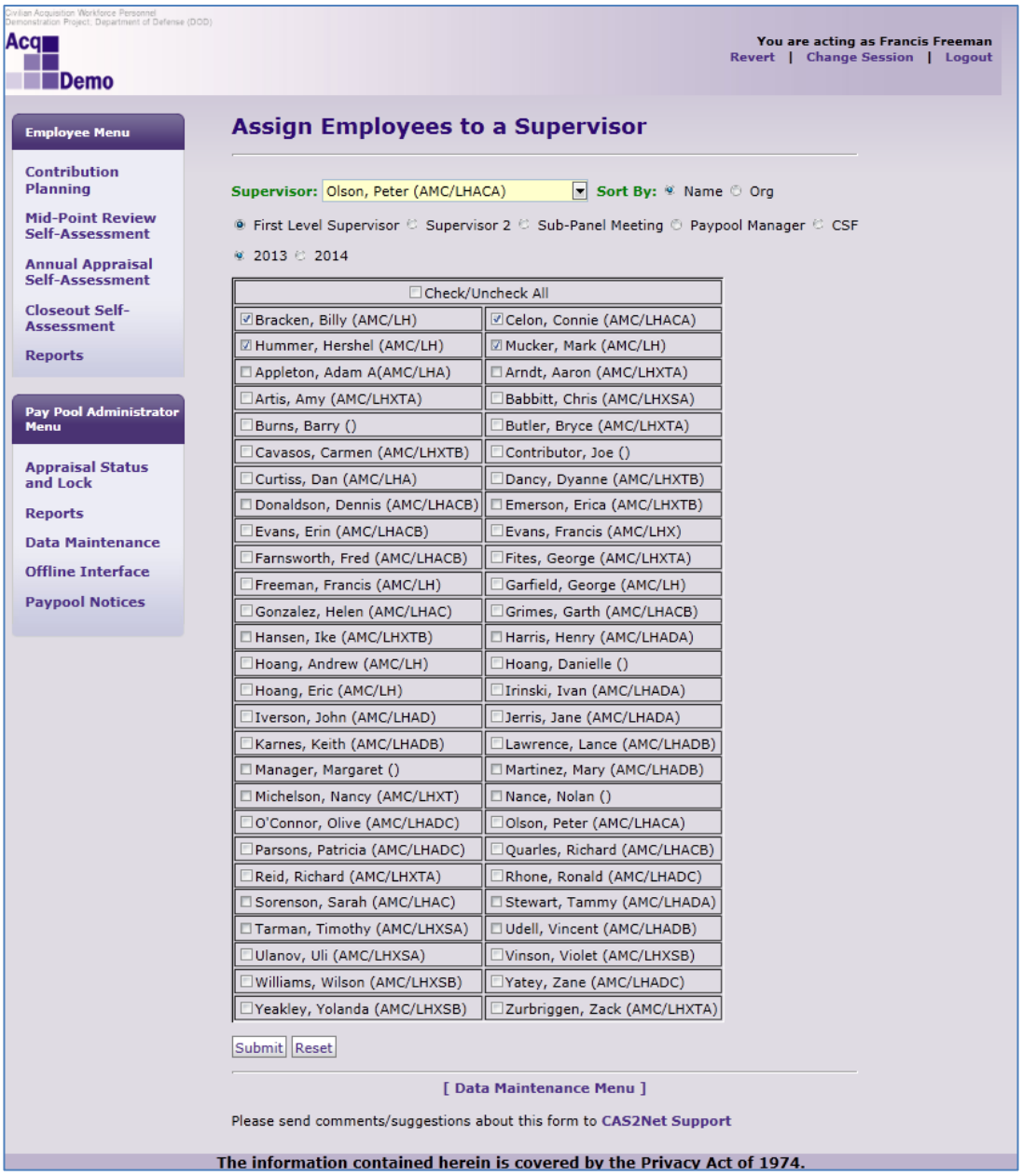


Figure 9-50: Assign Employees to Supervisor – Employees Selection

Verify the selected employees have been assigned to the supervisor.

Repeat for each supervisory role held by the selected supervisor by clicking on each of the levels of supervisor radio buttons.

"CURRENT YEAR" VERSUS "NEXT YEAR" SUPERVISOR ASSIGNMENTS

"Next year" supervisor assignments are presumed to be unchanged from the "current year"—unless and until the pay pool administrator explicitly assigns another supervisor for the "next year".

An employee name is "checked" when an explicit "next year" assignments has been stored in the CAS2Net database. An "unchecked" employee name means that the employee is assigned to another supervisor or that the "next year" assignment defaults to "current year" supervisor.

Select the employees to be explicitly assigned for "next year" and click the "Submit" button. Uncheck the employee name to remove an explicit "next year" assignment and restore the "current year" default.

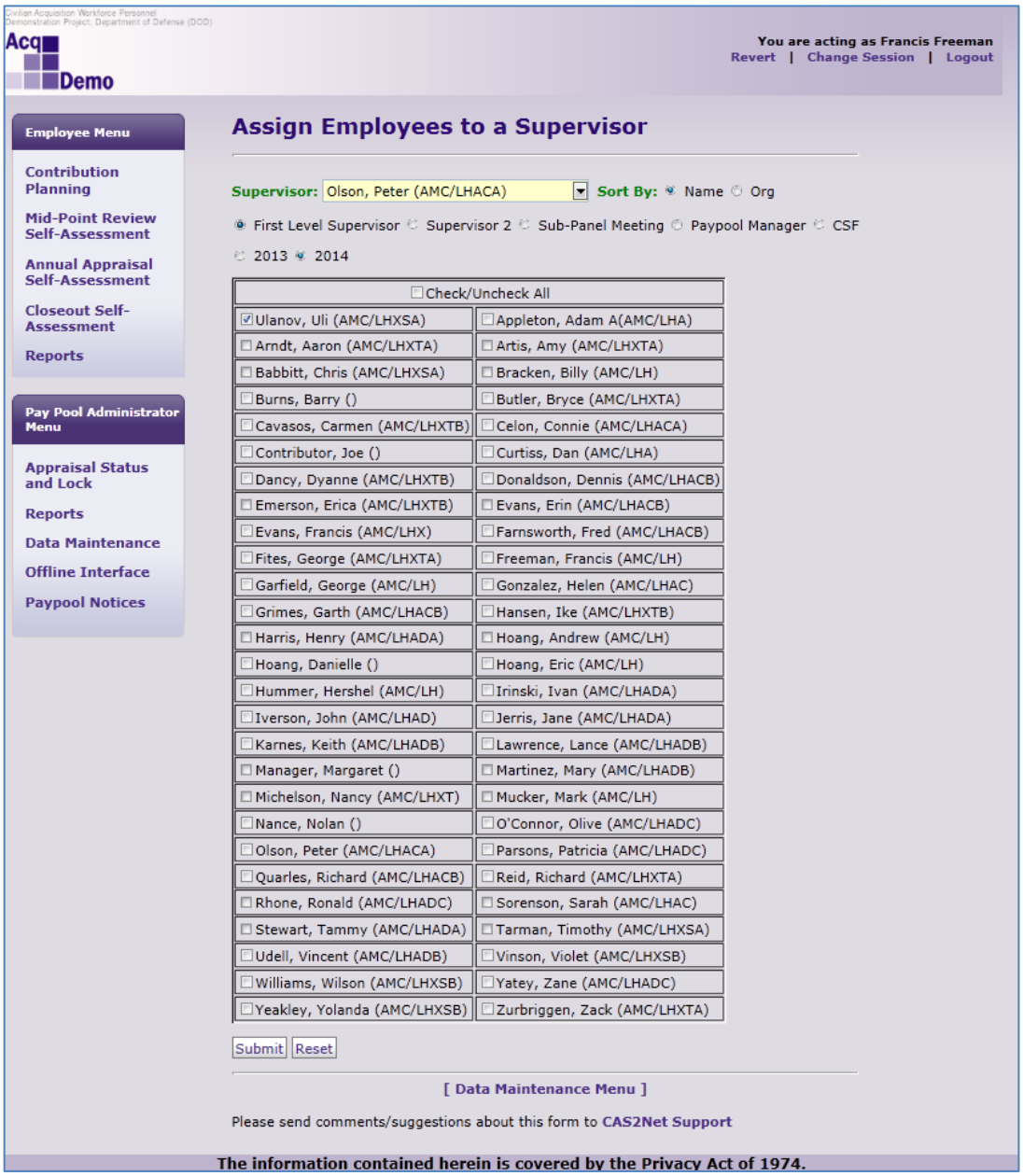


Figure 9-51: Assign Employees to "Next Year" Supervisor – Employees Selection

9.3.8 Replace Supervisor Assignments

To assign employees to a supervisor, click “Data Maintenance” from the navigation bar.

CAS2Net refreshes the screen to display the Employee Maintenance Menu.

Select the “Replace Supervisor Assignments” link. Use this option when a supervisor is replaced by another person.

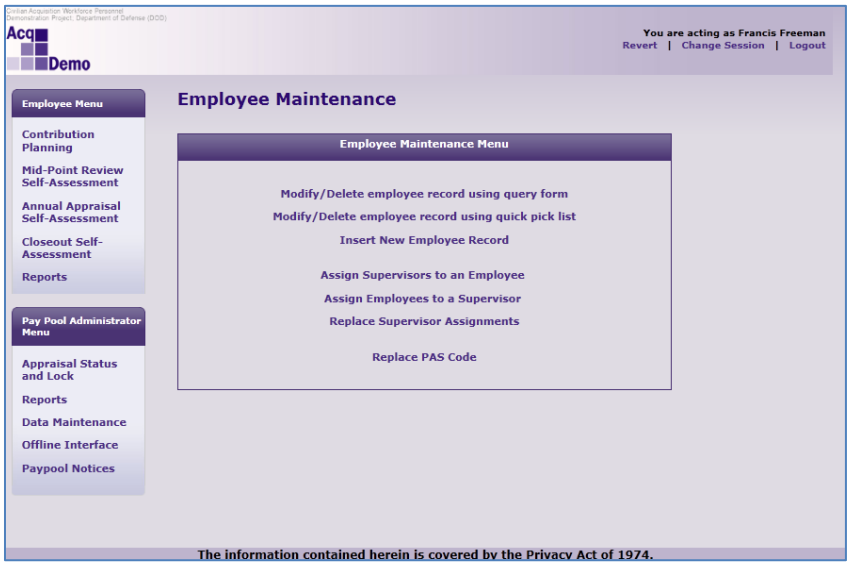


Figure 9-52: Replace Supervisor Assignments Link

The “Update Supervisor Assignments” screen is displayed.

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

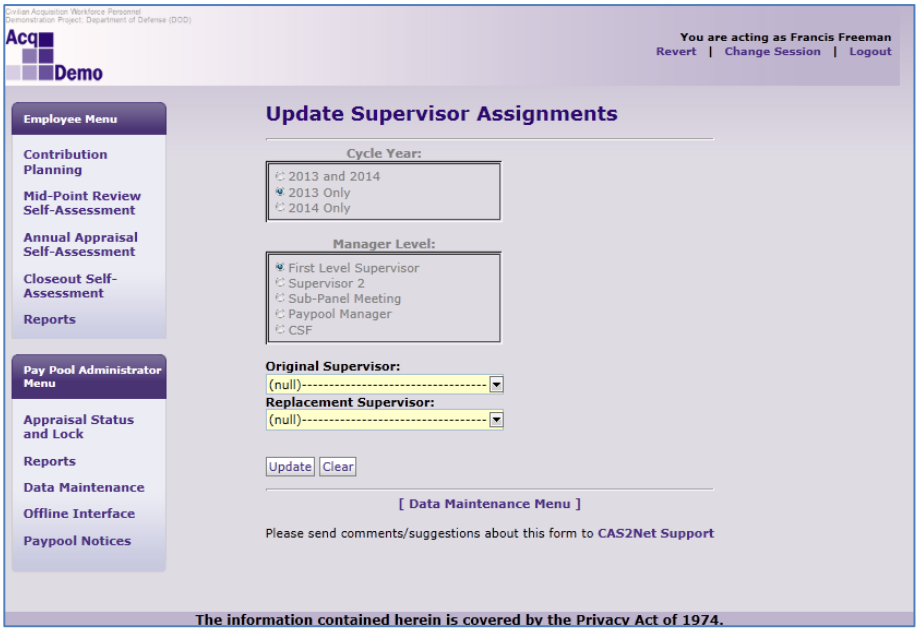


Figure 9-53: Update Supervisor Assignments – Supervisor Selection

Click “current year” or “next year” radio button to select the effective “Cycle Year”.

Click the associated radio button to select the level of supervision you want to replace assignments for the selected supervisor.

Select the name of the supervisor you want to replace assignments with from the “Replacement Supervisor” dropdown.

To clear selections, click the “Clear” button.

To submit changes, click the “Update” button.

CAS2Net displays a message indicating the number of successful replacements between the two selected supervisors.

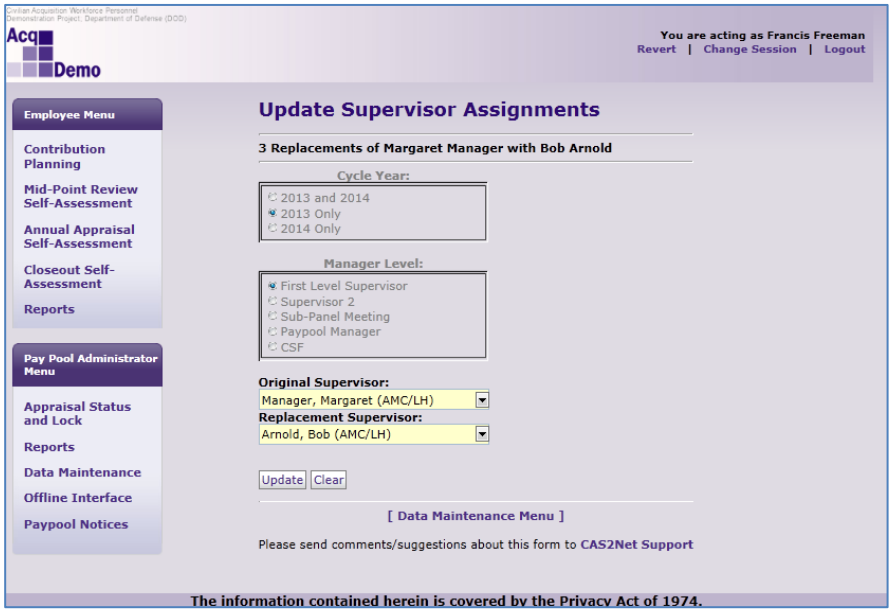


Figure 9-54: Replace Supervisor Assignments Successful

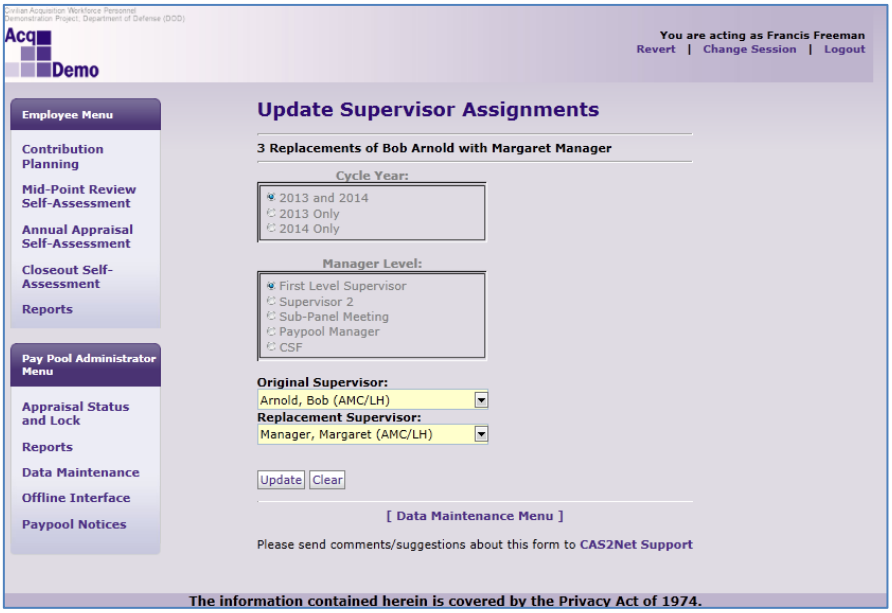


Figure 9-55: Replace Supervisor Assignments Successful

9.3.9 Replace Personnel Accounting Symbol (PAS) Code

To replace the Personnel Accounting Symbol (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.

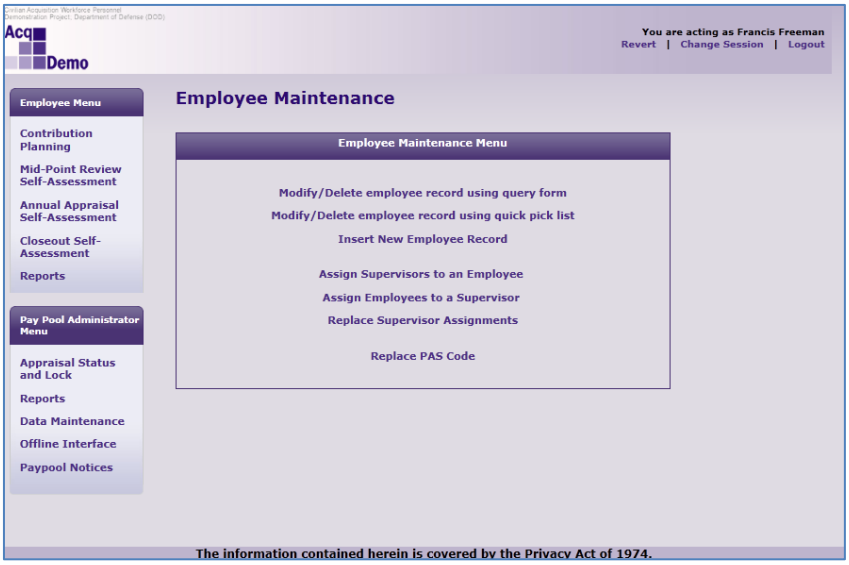


Figure 9-56: Replace PAS Code Link

The Replace PAS Code screen is displayed.

Figure 9-57: Replace PAS Code Web Page

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 CMS 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.

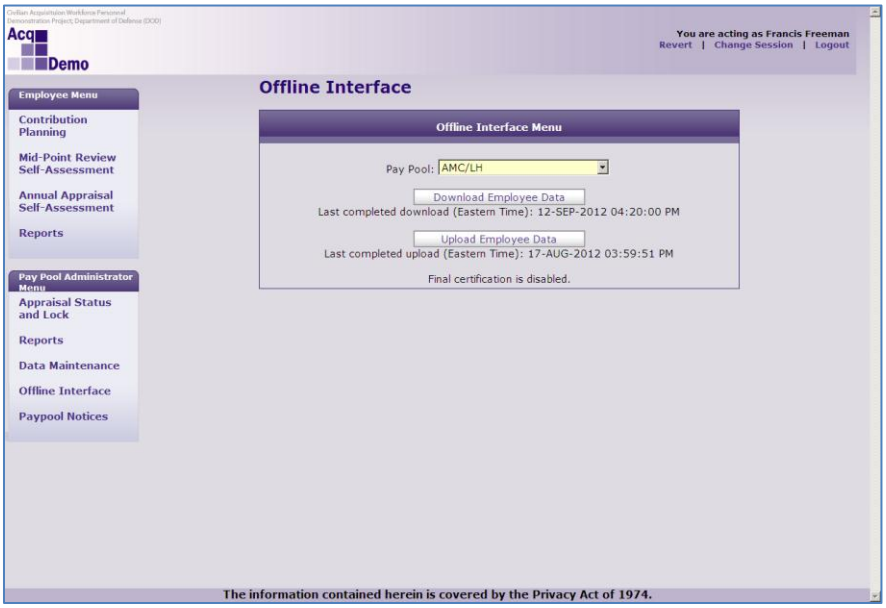


Figure 9-58: Offline Interface Menu

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 CMS 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_CMS.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_CMS_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_CMS_(No Manager).csv".

Click the “Download Employee Data” button to list the data files available for download.

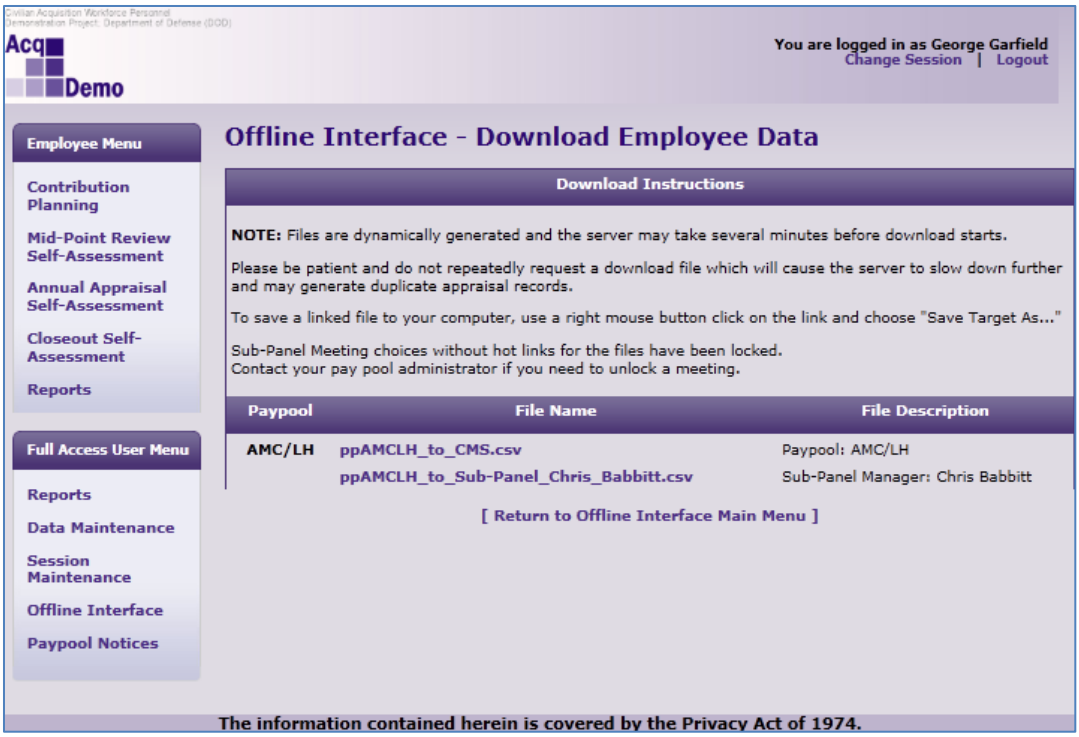


Figure 9-59: Offline Interface – Download Employee Data

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 CMS 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 9-60: 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 CMS 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.

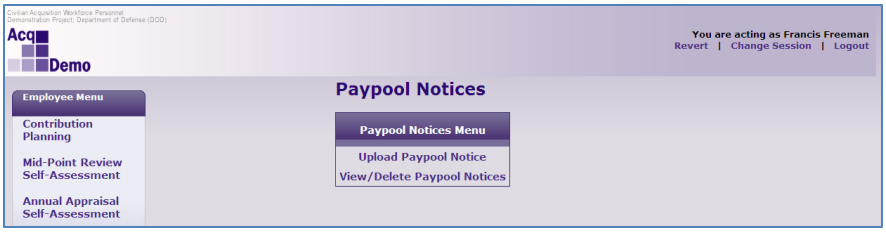


Figure 9-61: Paypool Notices Menu

FILE UPLOAD

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

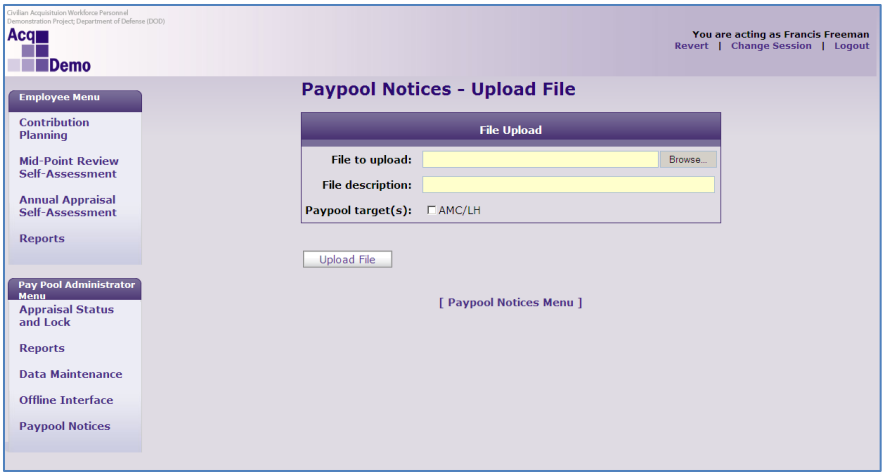


Figure 9-62: Paypool Notices Upload

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 9-63: 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.

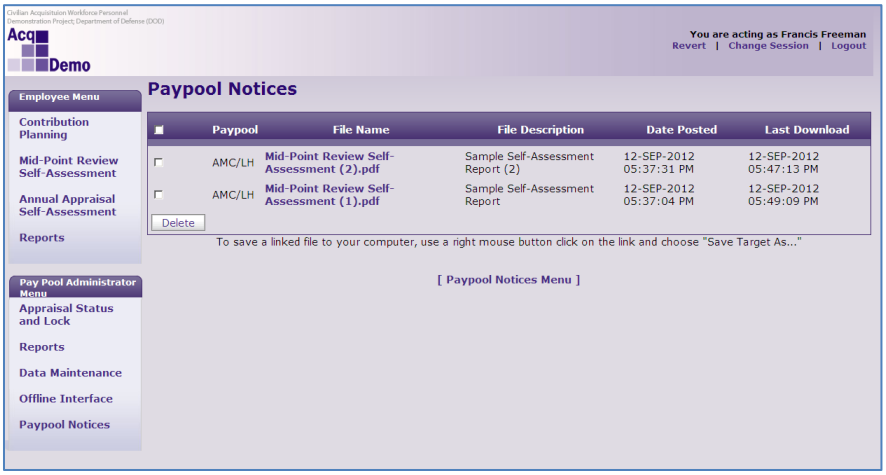


Figure 9-64: Paypool Notices List

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.

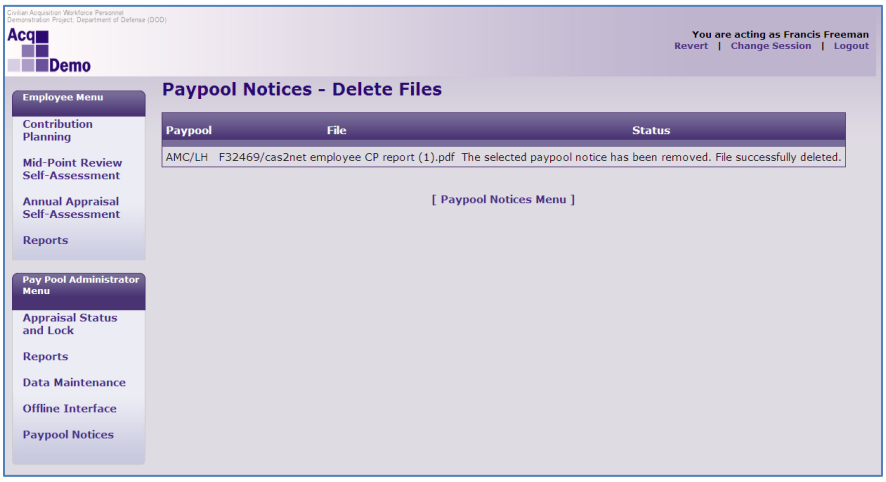


Figure 9-65: Paypool Notices – Delete Files Successful

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**, **Closeout Self-Assessment**, and **Reports**.

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

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

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 "9.1 Appraisal Status and Lock" for more information about this feature.

- The **Reports** option provides the capability to generate reports that list employees, appraisal status, assessments, etc.

- **Data Maintenance** provides maintenance tools for creating or updating employee records; supports assignment of one or more employees to the Level 1 Supervisor, Level 2 Supervisor, Sub-Panel Manager, or Pay Pool Manager of your assigned pay pool; provides the capability to assign one or more supervisors to an employee in your assigned pay pool.

  Refer to Section "9.3 Data Maintenance" for information relating to data maintenance functions.

- The **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 "9.4 Offline Interface" describes the CAS2Net to CMS Spreadsheet "Offline Interface".

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

  Refer to Section "9.5 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 Parts I, II and III – Single Employee
- Appraisal Form Parts I, II and III – All Employees
- CAS2Net Status Report & Excel Spreadsheet
- Contribution Planning Status
- Mid-Point Review – Single Employee
- Mid-Point Review – All Employees
- Closeout Assessment – Single Employee
- Closeout Assessment – All Employees
- Appraisal Status Report
- Download Employee Data
- Employee Roster
- Post-Cycle Activity Report
- Supervisor Roster By Employee
- Supervisor Roster By Supervisor
- Zone A/CIP Report

Figure 10-1: Superuser Reports Menu

Section “11.2 Supervisor Reports” provides samples of CAS2Net reports.

10.2 Session Maintenance

This section describes how the system users change and assume the role of another user.

1. Log in as Superuser or Full Access User.
2. Click on "Session Maintenance – Assume the role of another user".
3. CAS2Net displays Session Maintenance screen, includes:
   - User Group: Group of organizations, or roles such as Supervisor Level 1, Supervisor Level 2, Pay Pool Manager, Pay Pool Administrator, etc.
   - Selection: displays a dropdown list which contains the supervisors' names for each User Group
   - "Change to selected" buttons

Figure 10-2: Session Maintenance Screen

4. Select a role and name from the dropdown list that you wish to assume the role, and then click "Change to selected" button.
5. CAS2Net displays:
   - The current role shown as the name and role of the assumed supervisor
   - A "Revert To Self" button

- The appropriate menu options in the left navigation bar for the selected supervisor and role
- Options to switch to different roles within the organization the assumed

Note: When CAS2Net changes the current role to the selected name and role, the menu options also changed. The example here shows the assumed supervisor is "Supervisor, Level 1", the left navigation bar shows all options belong to that role:

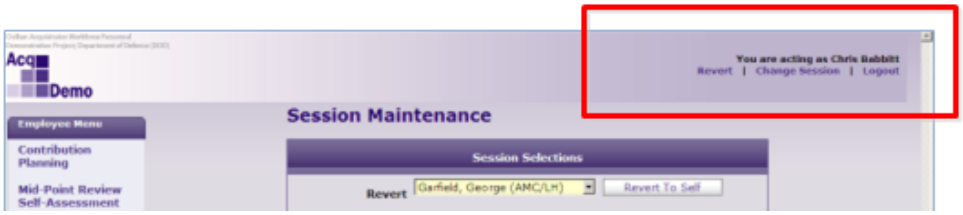


Figure 10-3: Session Maintenance – "Current Role Is…" Screen

6. To resume work as the logged in supervisor, click the "Revert To Self" button.
7. CAS2Net goes back to the logged on Superuser or Full Access User's Session Maintenance screen.

11. CAS2NET REPORTS

The CAS2NET Reports functionality allows supervisors to generate reports that list employees, appraisal status, supervisor assignments, etc.

11.1 Employee Reports

- Clicking **Reports** in the Employee menu of the left side navigation bar brings up a list of reports that are available to the employee.
- CAS2Net displays CAS2Net report menu

Figure 11-1: Employee Reports Menu

11.1.1 Contribution Planning

- From the Employee Reports menu, select Contribution Planning – Single Employee.
- CAS2Net displays the "Contribution Plan – Employee" for the employee.
- Click "Generate" to produce the report.

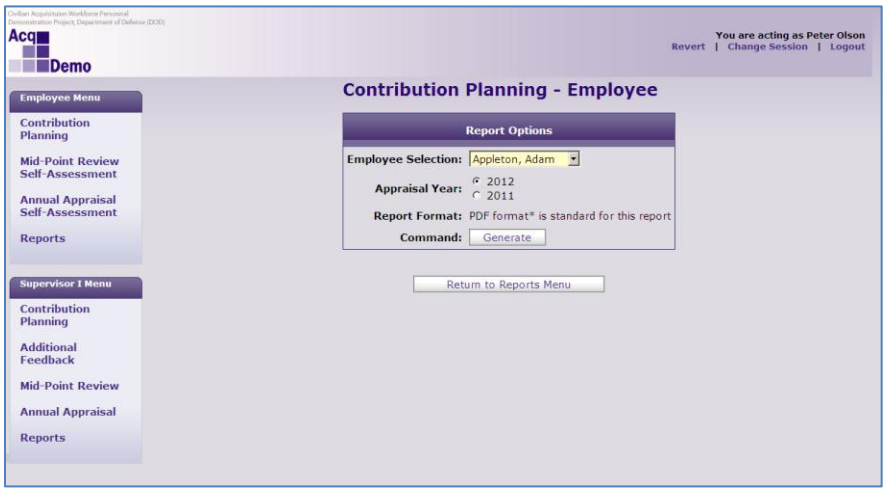


Figure 11-2: Employee Contribution Planning Report Selection

- CAS2Net displays Contribution Planning report with the selected employee name print on the title (see figure: Employee Contribution Planning Report).

Contribution Planning for Uli Ulanov

Year: 2013

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

Method of Communication: **Date Conducted:** 08/22/13

Face to Face

Figure 11-3: Employee Contribution Planning Report

11.1.2 Additional Feedback

- From the Supervisor Reports menu, select Additional Feedback – Single Employee.
- CAS2Net displays Additional Feedback – Employee screen for the employee.
- Click "Generate" to produce the report.

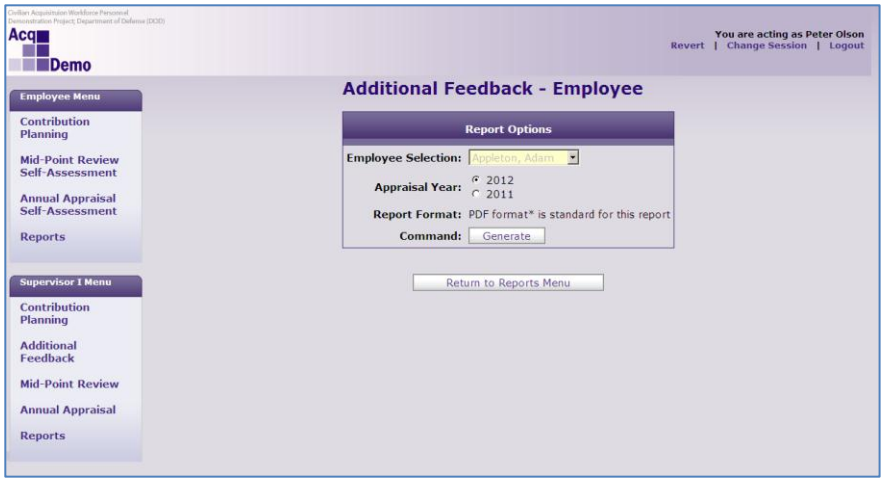
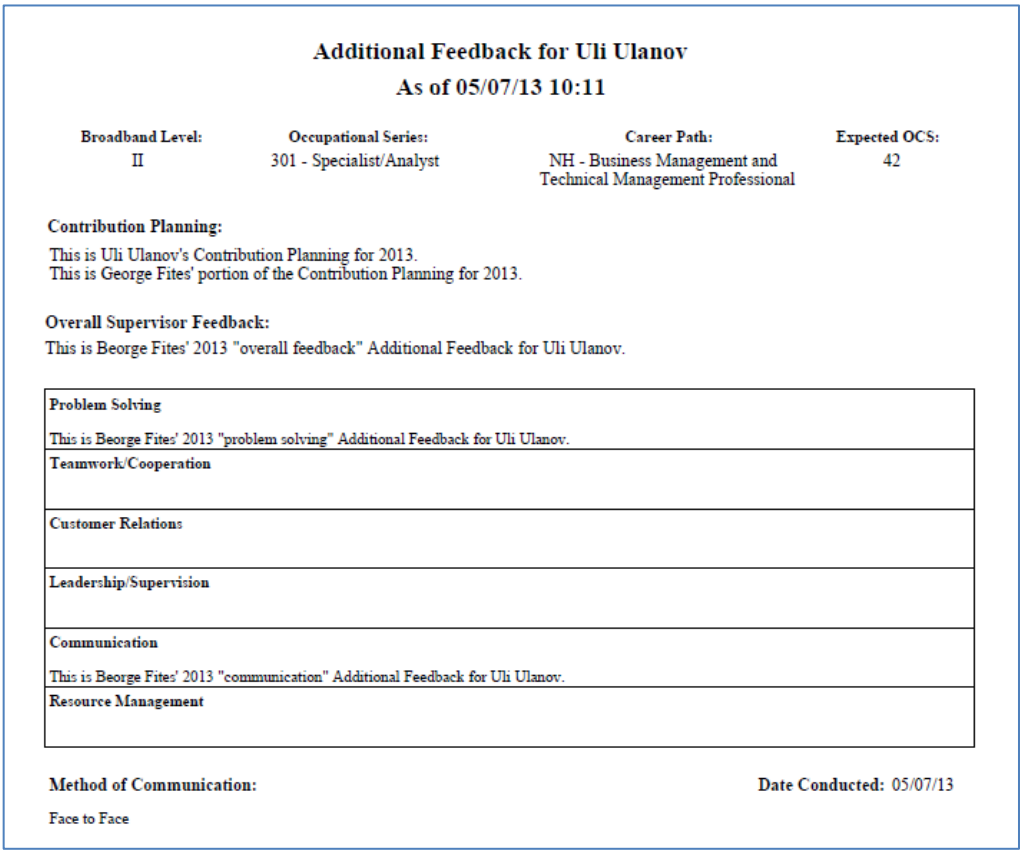


Figure 11-4: Additional Feedback Report Selection

- CAS2Net displays Additional Feedback report with the selected employee name print on the title (see figure: Employee Additional Feedback Report).



Additional Feedback for Uli Ulanov

As of 05/07/13 10:11

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli Ulanov's Contribution Planning for 2013.
This is George Fites' portion of the Contribution Planning for 2013.

Overall Supervisor Feedback:

This is Beorge Fites' 2013 "overall feedback" Additional Feedback for Uli Ulanov.

Problem Solving This is Beorge Fites' 2013 "problem solving" Additional Feedback for Uli Ulanov.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication This is Beorge Fites' 2013 "communication" Additional Feedback for Uli Ulanov.
Resource Management

Method of Communication: **Date Conducted:** 05/07/13

Face to Face

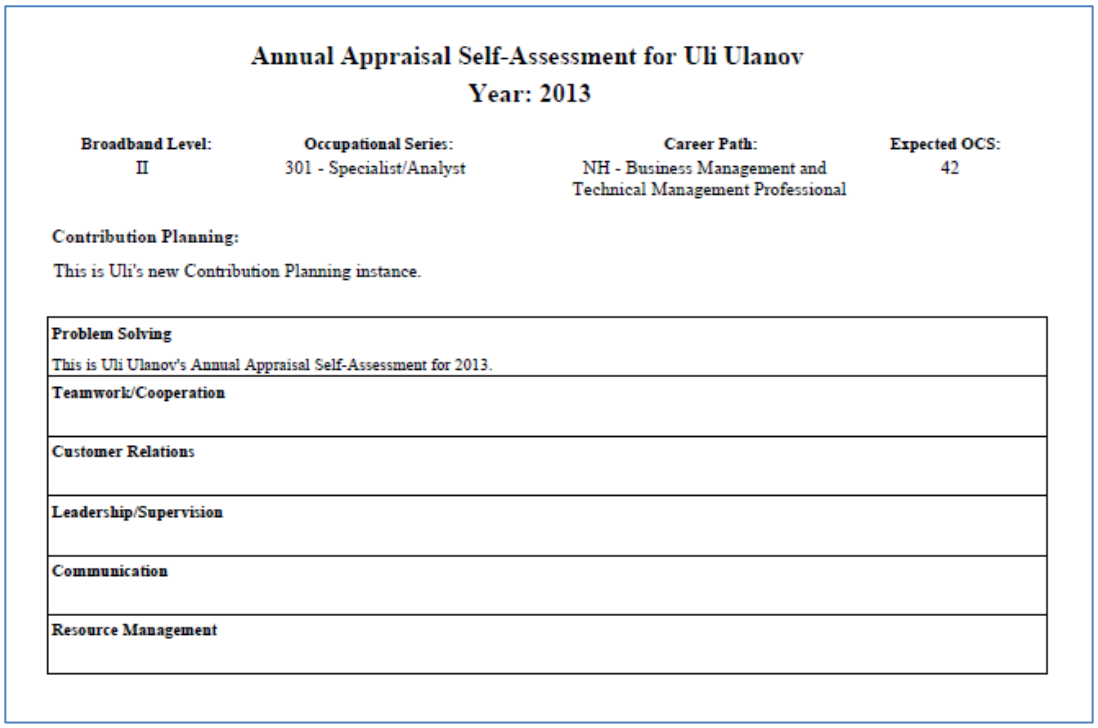
Figure 11-5: Employee Additional Feedback Report

11.1.3 Annual Appraisal Self-Assessment

- From the Employee Reports menu, select Annual Appraisal Self-Assessment.
- CAS2Net displays the "Annual Appraisal Self-Assessment – Single Employee" for the employee.
- Click "Generate" to produce the report.

Figure 11-6: Annual Appraisal Self-Assessment Report Selection

- CAS2Net displays Annual Appraisal Self-Assessment report (see figure: Annual Appraisal Self-Assessment Report).



Annual Appraisal Self-Assessment for Uli Ulanov
Year: 2013

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

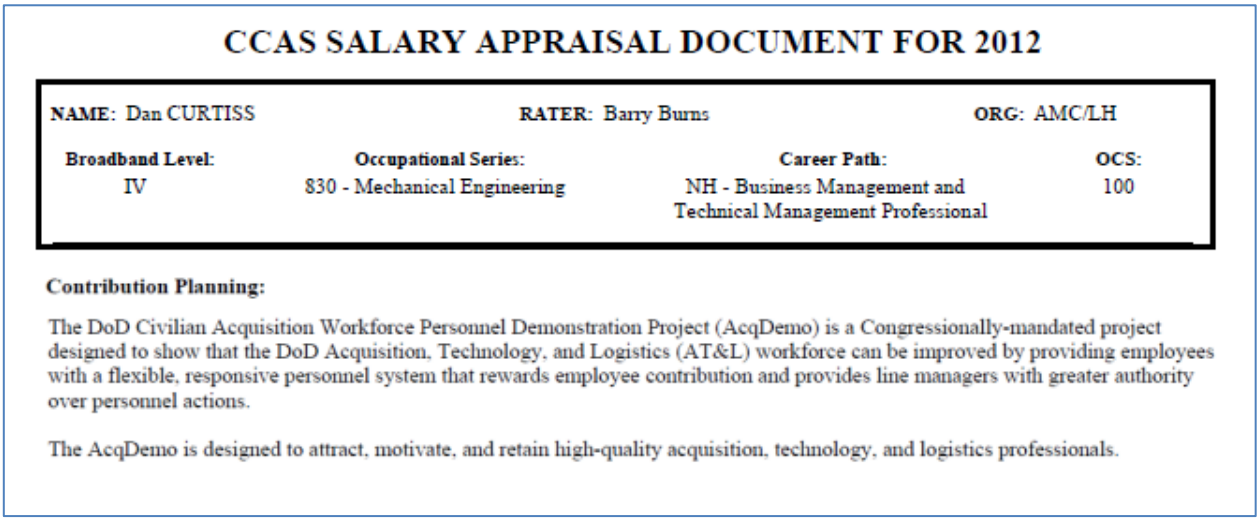
Problem Solving This is Uli Ulanov's Annual Appraisal Self-Assessment for 2013.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication
Resource Management

Figure 11-7: Annual Appraisal Self-Assessment Report

11.1.4 Appraisal Form Parts I, II and III

- From the CAS2Net employee reports menu, select Appraisal Form Parts I, II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts I, II and III – Single Employee screen.
- Click "Generate" to produce the report.
- CAS2Net displays CCAS Salary Appraisal Document report in three parts: Part I – Salary Appraisal Form and Contribution Planning; Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figures: Appraisal Form Parts I, II and III Report, Contribution Planning ; Appraisal Form Parts I, II and III Report, Part I (Pages 1 and 2); Appraisal Form Parts I, II and III Report, Part II; and Appraisal Form Parts II and III Report, Part III).

Figure 11-8: Appraisal Form Parts I, II and III Report Selection



CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS	RATER: Barry Burns	ORG: AMC/LH	
Broadband Level: IV	**Occupational Series:** 830 - Mechanical Engineering	**Career Path:** NH - Business Management and Technical Management Professional	**OCS:** 100

Contribution Planning:

The DoD Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo) is a Congressionally-mandated project designed to show that the DoD Acquisition, Technology, and Logistics (AT&L) workforce can be improved by providing employees with a flexible, responsive personnel system that rewards employee contribution and provides line managers with greater authority over personnel actions.

The AcqDemo is designed to attract, motivate, and retain high-quality acquisition, technology, and logistics professionals.

Figure 11-9: Appraisal Form Parts I, II and III Report, Contribution Planning

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

Part I: CCAS Salary Appraisal Form

Name:	Dan CURTISS	**Series:**	0830	**Appraisal Period:**	
CAS2Net ID:	4	**Broadband Level:**	IV	**From:**	01-OCT-11
Organization:	AMC/LHA	**Retained Pay:**	No	**To:**	30-SEP-12
Career Path:	NH	**Presumptive:**	None		

Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.

Bob Arnold, Pay Pool Manager — **Date**

Date

Date

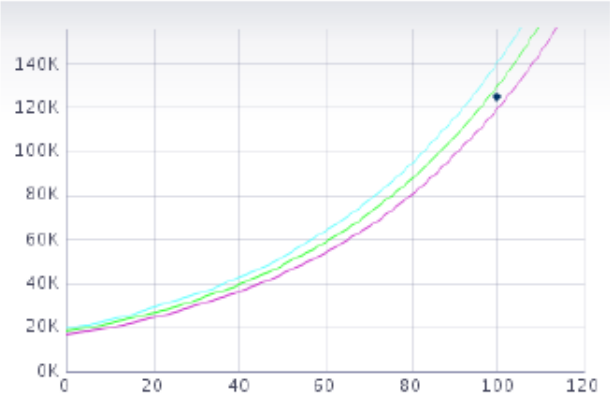
Employee Signature — **Date**

Appraisal Detail

Overall Contribution Score:	100	Upper Rail OCS	95
Next Year's Expected SPL OCS:	99	SPL OCS	98
Approved Rail Position	C2	Lower Rail OCS	102

Employee Contribution Pay Comparison Chart

The graph plots the Employee Appraisal relative to the standard pay line (SPL) and rails. The top and bottom lines are the **Upper and Lower Rails**. The middle line is the SPL. The point is the **Employee Appraisal**.



Compensation Detail

	$125,000	Current Rate of Base Pay		
+	$0	G Increase		
+	$2,532	CRI Increase		
	$127,532	**New Rate of Base Pay**		
+	$27,968	Locality Pay *	@	24.22%
	$155,500	**New Total Salary**		
	$1,079	Contribution Award		

*Locality pay has been reduced to cap total salary at the Executive Schedule Level IV salary cap.

Remarks

Privacy Act Statement (552a of 5 U.S.C.)
1. AUTHORITY: Section III.D, Federal Register Notice dated January 8, 1999.
2. PURPOSE: This form summaries the annual evaluation of an employee¿s contribution through CCAS assessment.
3. ROUTINE USE: This form is a computer-generated form that is produced for each employee and contains the overall contribution score and space for the signature of the PPM, the supervisor, and the employee. The original of this form will be maintained in accordance with agency procedures.
4. DISCLOSURE: The information contained within this form is personal in nature and is restricted to those with appropriate permissions. Information collected on this form may be used for statistical and impact analysis.

Figure 11-10: Appraisal Form Parts I, II and III Report, Part I (Page 1)

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

Part I: CCAS Salary Appraisal Form

Page 2

Name:	Dan CURTISS	**Series:**	0830	**Appraisal Period:**	
CAS2Net ID:	4	**Broadband Level:**	IV	**From:**	01-OCT-11
Organization:	AMC/LHA	**Retained Pay:**	No	**To:**	30-SEP-12
Career Path:	NH	**Presumptive:**	None		

Factor	Categorical Score	Final Score
Problem Solving	4H	100
Teamwork/Cooperation	4H	100
Customer Relations	4H	100
Leadership/Supervision	4H	100
Communication	4H	100
Resource Management	4H	100
OCS		100
Delta OCS	2	

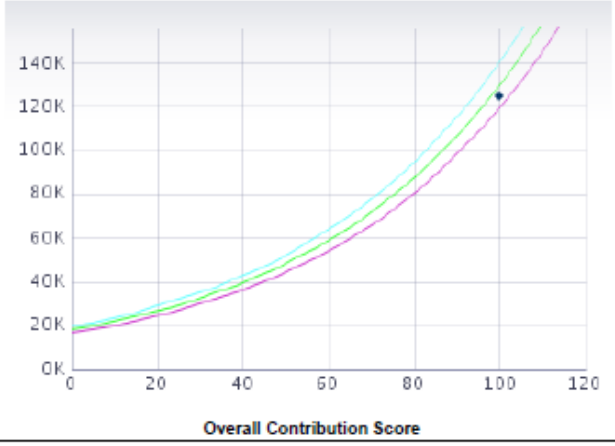


Figure 11-11: Appraisal Form Parts I, II and III Report, Part I (Page 2)

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS **RATER:** Barry Burns **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
IV	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	100

PART II Supervisor Assessment

DRAFT Assessment - not complete until finalized by Pay Pool Panel

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 None	4H	100
Teamwork/Cooperation None	4H	100
Customer Relations None	4H	100
Leadership/Supervision None	4H	100
Communication None	4H	100
Resource Management None	4H	100

Figure 11-12: Appraisal Form Parts I, II and III Report, Part II

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS **RATER:** Barry Burns **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
IV	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	100

PART III Employee Self-Assessment

Problem Solving This is Dan Curtiss' self-assessment for the problem solving factor.	
Teamwork/Cooperation This is my assessment for the Teamwork/Cooperation factor	
Customer Relations	
Leadership/Supervision	
Communication	
Resource Management	

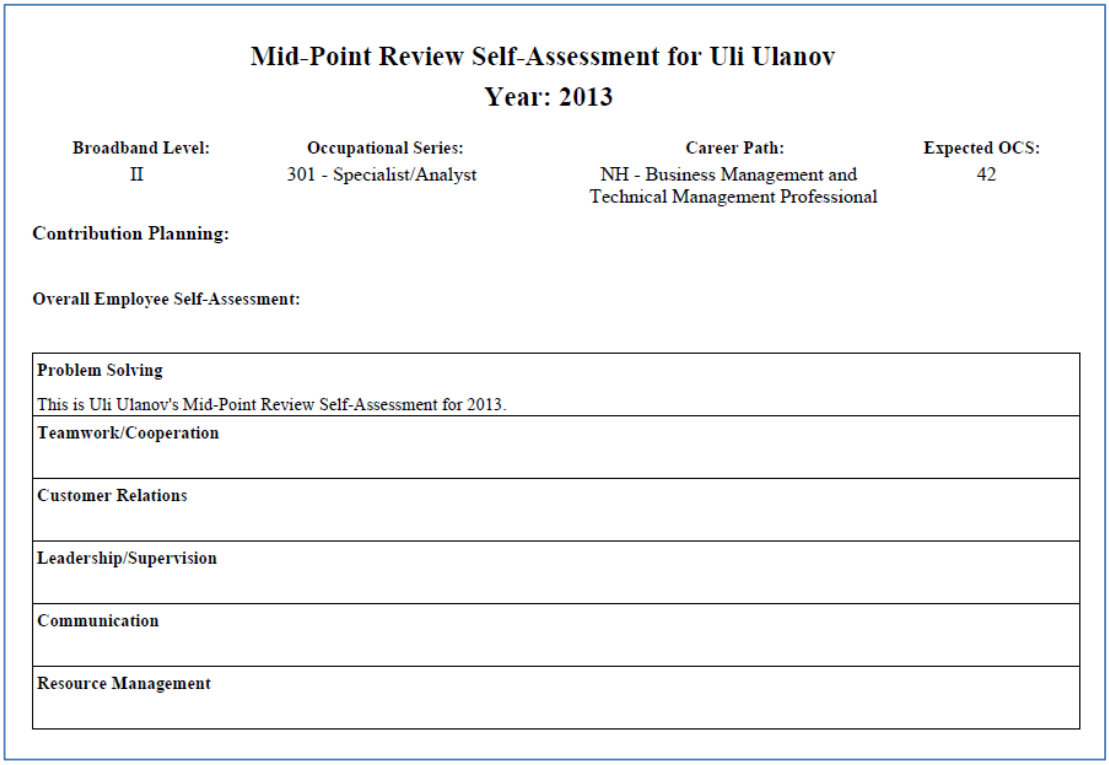
Figure 11-13: Appraisal Form Parts I, II and III Report, Part III

11.1.5 Mid-Point Review Self-Assessment

- From the Employee Reports menu, select Mid-Point Self-Assessment.
- CAS2Net displays the "Mid-Point Review Self-Assessment – Single Employee" for the employee.
- Click "Generate" to produce the report.

Figure 11-14: Mid-Point Review Self-Assessment Report Selection

- CAS2Net displays the Mid-Point Review Self-Assessment report (see figure: Mid-Point Review Self-Assessment Report).



Mid-Point Review Self-Assessment for Uli Ulanov

Year: 2013

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

Overall Employee Self-Assessment:

Problem Solving This is Uli Ulanov's Mid-Point Review Self-Assessment for 2013.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication
Resource Management

Figure 11-15: 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.
- Click "Generate" to produce the report.
- CAS2Net displays Mid-Point Review report with the selected employee name print on the title (see figure: Mid-Point Review Report).

Figure 11-16: Mid-Point Review Report Selection

Mid-Point Review for Uli Ulanov
As of 09/11/13 08:50

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

Employee Self-Assessment:

Problem Solving This is Uli Ulanov's Mid-Point Review Self-Assessment for 2013.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication
Resource Management

Supervisor Assessment:

Problem Solving This is George Fites 2013 "problem solving" Mid-Point Review supervisor assessment for Uli Ulanov,
Teamwork/Cooperation
Customer Relations This is George Fites 2013 "customer relations" Mid-Point Review supervisor assessment for Uli Ulanov,
Leadership/Supervision
Communication
Resource Management

Method of Communication: Face to Face

Date Conducted: 09/11/13

Figure 11-17: Mid-Point Review Report

11.1.7 Closeout Self-Assessment

- From the Employee Reports menu, select Closeout Self-Assessment.
- CAS2Net displays the “Closeout Self-Assessment – Single Employee” for the employee.
- Click “Generate” to produce the report.

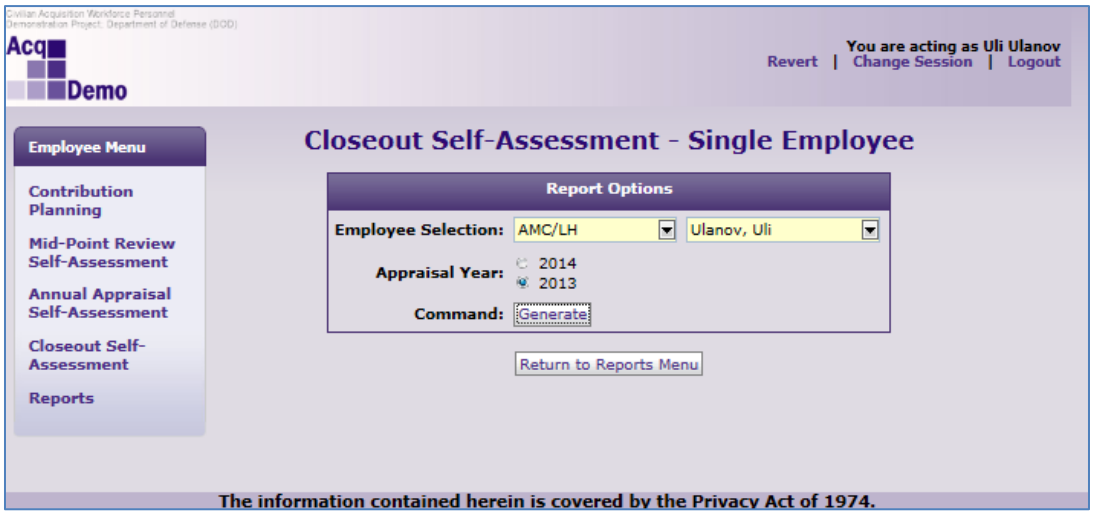
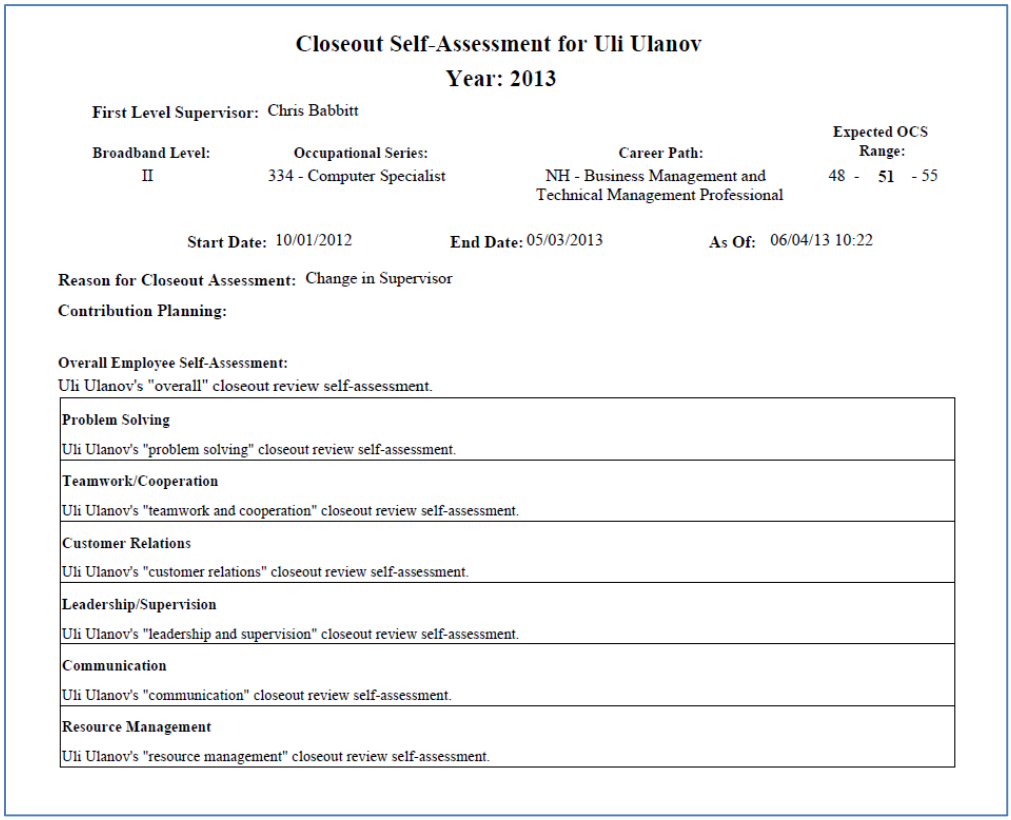


Figure 11-18: Closeout Self-Assessment Report Selection

- CAS2Net displays the Mid-Point Review Self-Assessment report (see figure: Closeout Self-Assessment Report).



Closeout Self-Assessment for Uli Ulanov

Year: 2013

First Level Supervisor: Chris Babbitt

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
II	334 - Computer Specialist	NH - Business Management and Technical Management Professional	48 - 51 - 55

Start Date: 10/01/2012 **End Date:** 05/03/2013 **As Of:** 06/04/13 10:22

Reason for Closeout Assessment: Change in Supervisor

Contribution Planning:

Overall Employee Self-Assessment:
Uli Ulanov's "overall" closeout review self-assessment.

Problem Solving Uli Ulanov's "problem solving" closeout review self-assessment.
Teamwork/Cooperation Uli Ulanov's "teamwork and cooperation" closeout review self-assessment.
Customer Relations Uli Ulanov's "customer relations" closeout review self-assessment.
Leadership/Supervision Uli Ulanov's "leadership and supervision" closeout review self-assessment.
Communication Uli Ulanov's "communication" closeout review self-assessment.
Resource Management Uli Ulanov's "resource management" closeout review self-assessment.

Figure 11-19: Closeout Self-Assessment Report

11.1.8 Closeout Assessment

- From the CAS2Net employee reports menu, select Closeout Assessment.
- CAS2Net displays Closeout Assessment – Single Employee screen.
- Click "Generate" to produce the report.
- CAS2Net displays Closeout Assessment report with the selected employee name printed in the title (see figure: Closeout Assessment Report).

Figure 11-20: Closeout Assessment Report Selection

Closeout Assessment for Uli Ulanov

Year: 2013

First Level Supervisor: Chris Babbitt

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
II	334 - Computer Specialist	NH - Business Management and Technical Management Professional	48 - **51** - 55

Start Date: 10/01/2012 **End Date:** 05/03/2013 **As Of:** 09/26/13 12:09

Reason for Closeout Assessment: Change in Supervisor

Contribution Planning:
This is Uli Ulanov's Contribution Planning for 2013.

And this is Chris Babbitts' input to Uli's Contribution Planning for 2013.

Chris Babbitt modified the Contribution Planning text on June 17 at 16:10 p.m.

Overall Employee Self-Assessment:
Uli Ulanov's "overall" closeout review self-assessment.

Problem Solving Uli Ulanov's "problem solving" closeout review self-assessment.
Teamwork/Cooperation Uli Ulanov's "teamwork and cooperation" closeout review self-assessment.
Customer Relations Uli Ulanov's "customer relations" closeout review self-assessment.
Leadership/Supervision Uli Ulanov's "leadership and supervision" closeout review self-assessment.
Communication Uli Ulanov's "communication" closeout review self-assessment.
Resource Management Uli Ulanov's "resource management" closeout review self-assessment.

Supervisor Assessment:
Chris Babbitt's "overall" closeout review supervisor assessment

Problem Solving Chris Babbitt's "problem solving" closeout review supervisor assessment.
Teamwork/Cooperation Chris Babbitt's "teamwork and cooperation" closeout review supervisor assessment
Customer Relations Chris Babbitt's "customer relations" closeout review supervisor assessment.
Leadership/Supervision Chris Babbitt's "leadership and supervision" closeout review supervisor assessment.
Communication Chris Babbitt's "communication" closeout review supervisor assessment.
Resource Management Chris Babbitt's "resource management" closeout review supervisor assessment.

Method of Communication: **Date Conducted:**

Figure 11-21: Closeout Assessment Report

11.2 Supervisor Reports

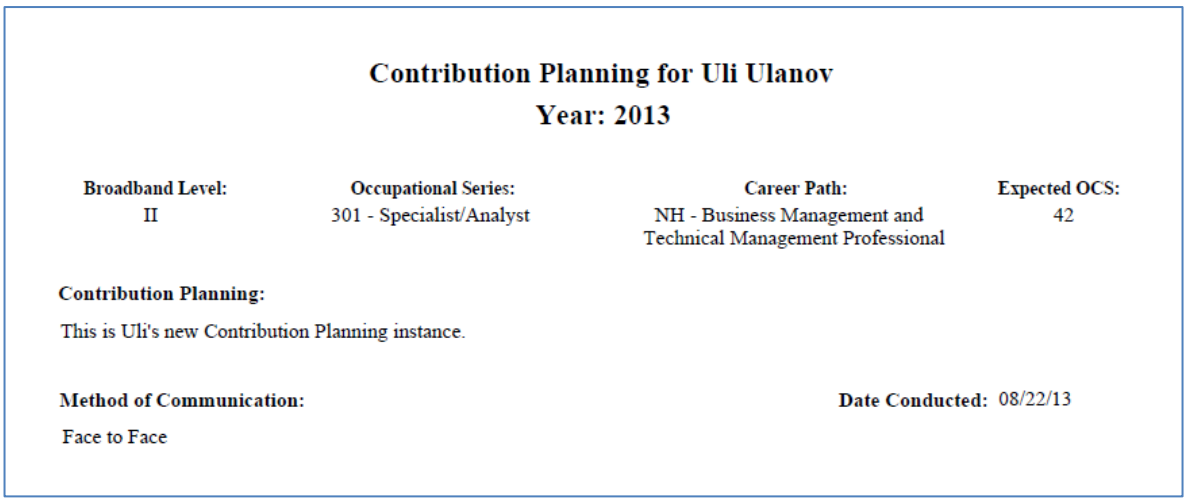
Clicking **Reports** in the supervisor menu of the left side navigation bar brings up a list of reports that are available to the supervisor role.

Figure 11-22: Supervisor Reports Menu

11.2.1 Contribution Planning – Single Employee

- From the Supervisor Reports menu, select Contribution Planning – Single Employee.
- CAS2Net displays Contribution Plan – Employee screen (see figure: Contribution Planning Report – Single Employee Selection).
- Select employee from the Employee Selection dropdown list and click "Generate" to produce the report.
- CAS2Net displays Contribution Planning report with the selected employee name print on the title (see figure: Contribution Planning Report).

Figure 11-23: Contribution Planning Report – Single Employee Selection



Contribution Planning for Uli Ulanov

Year: 2013

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

Method of Communication: Face to Face

Date Conducted: 08/22/13

Figure 11-24: Contribution Planning Report

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).
- Click "Generate" to produce the report.
- CAS2Net displays Contribution Planning reports of all employees, with each employee name print on the title of each employee Contribution Planning report (Note: All Employees report format is the same as Single Employee format, see figure: Contribution Planning Report for example).

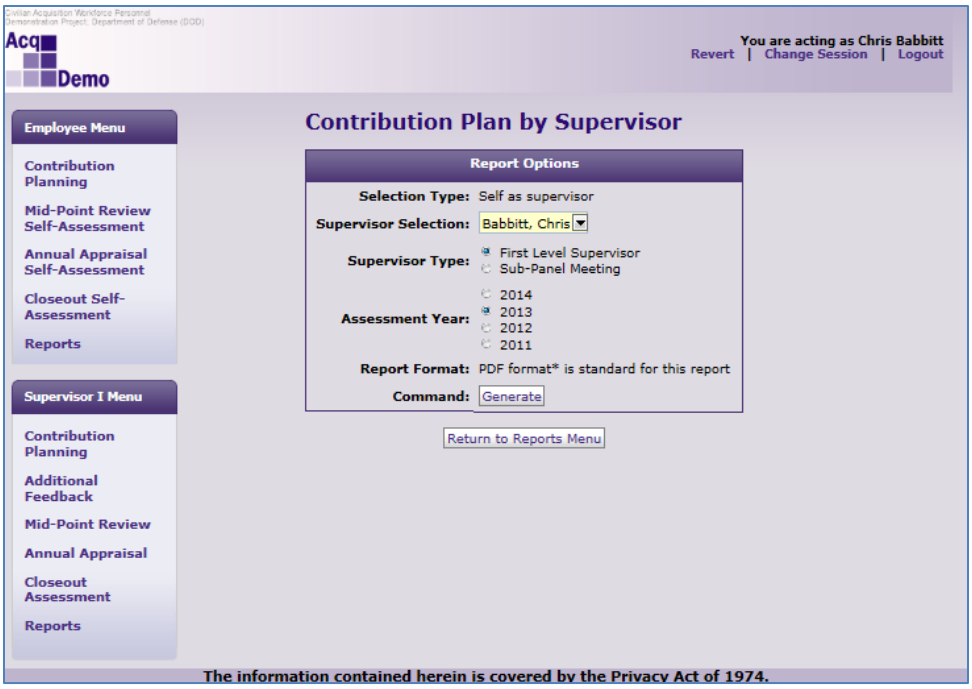


Figure 11-25: Contribution Planning Report – All Employees Selection

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: Additional Feedback Report – Single Employee Selection).
- Select employee from the Employee Selection dropdown list.
- Click "Generate" to produce the report.
- CAS2Net displays Additional Feedback report with the selected employee name print on the title (see figure: Additional Feedback Report).

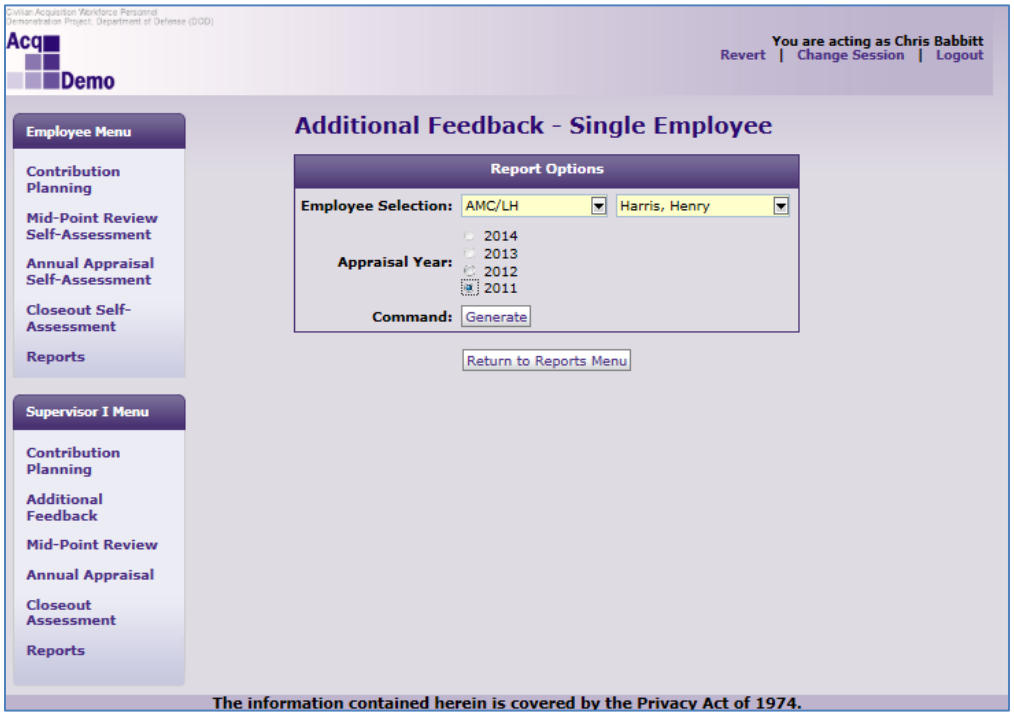


Figure 11-26: Additional Feedback Report – Single Employee Selection

Additional Feedback for Uli Ulanov

As of 05/07/13 10:11

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli Ulanov's Contribution Planning for 2013.
This is George Fites' portion of the Contribution Planning for 2013.

Overall Supervisor Feedback:

This is Beorge Fites' 2013 "overall feedback" Additional Feedback for Uli Ulanov.

Problem Solving This is Beorge Fites' 2013 "problem solving" Additional Feedback for Uli Ulanov.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication This is Beorge Fites' 2013 "communication" Additional Feedback for Uli Ulanov.
Resource Management

Method of Communication: **Date Conducted:** 05/07/13

Face to Face

Figure 11-27: Additional Feedback Report

11.2.4 Additional Feedback – All Employees

- From the Supervisor Reports menu, select Additional Feedback – All Employees.
- CAS2Net displays Additional Feedback screen (see figure: 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).
- Click "Generate" to produce the report.
- CAS2Net displays Additional Feedback reports of all employees, with each employee name printed in the title of each employee Additional Feedback report.

  (Note: All Employees report format is the same as Single Employee format, see figure: Additional Feedback Report for example).

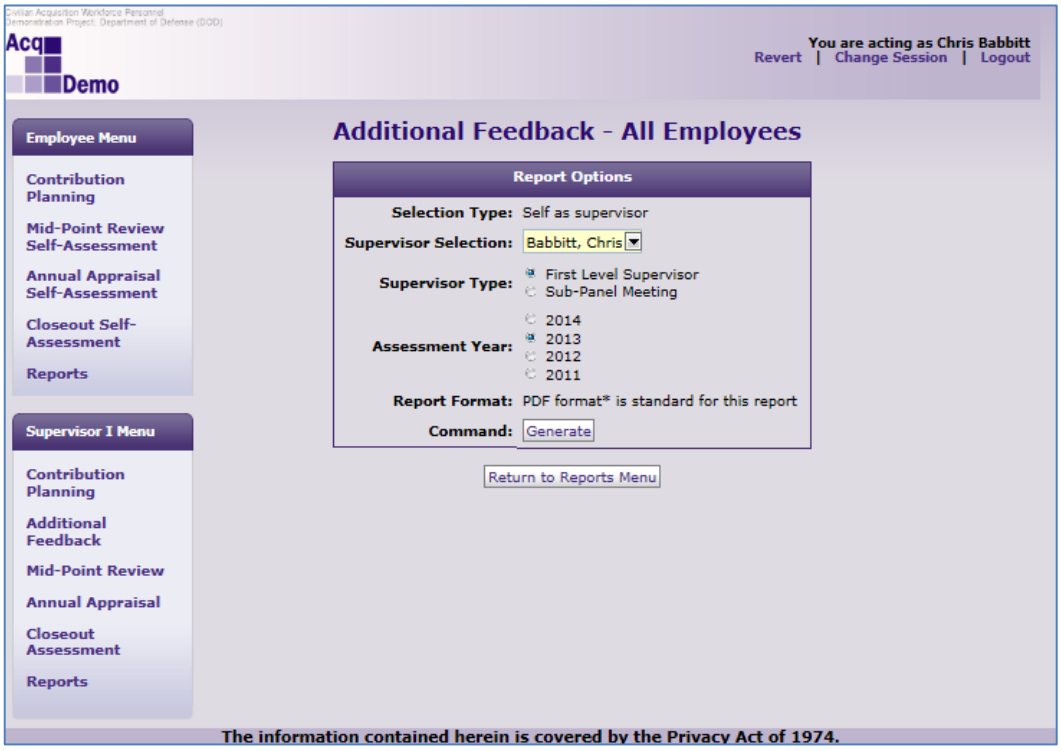


Figure 11-28: Additional Feedback Report - All Employees Selection

11.2.5 Appraisal Form Parts I, II and III – Single Employee

- From the Supervisor Reports menu, select Appraisal Form Parts I, II and III – Single Employee.
- CAS2Net displays Appraisal Form Parts I, II and III screen (see figure: Appraisal Form Parts II and III – Single Employee selection).
- Select employee from the Employee Selection dropdown list and click "Generate" to produce the report.
- CAS2Net displays CCAS Salary Appraisal Document report in three parts: Part I – Salary Appraisal Form and Contribution Planning; Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figures: Appraisal Form Parts I, II and III Report, Contribution Planning ; Appraisal Form Parts I, II and III Report, Part I (Pages 1 and 2); Appraisal Form Parts I, II and III Report, Part II; and Appraisal Form Parts II and III Report, Part III).

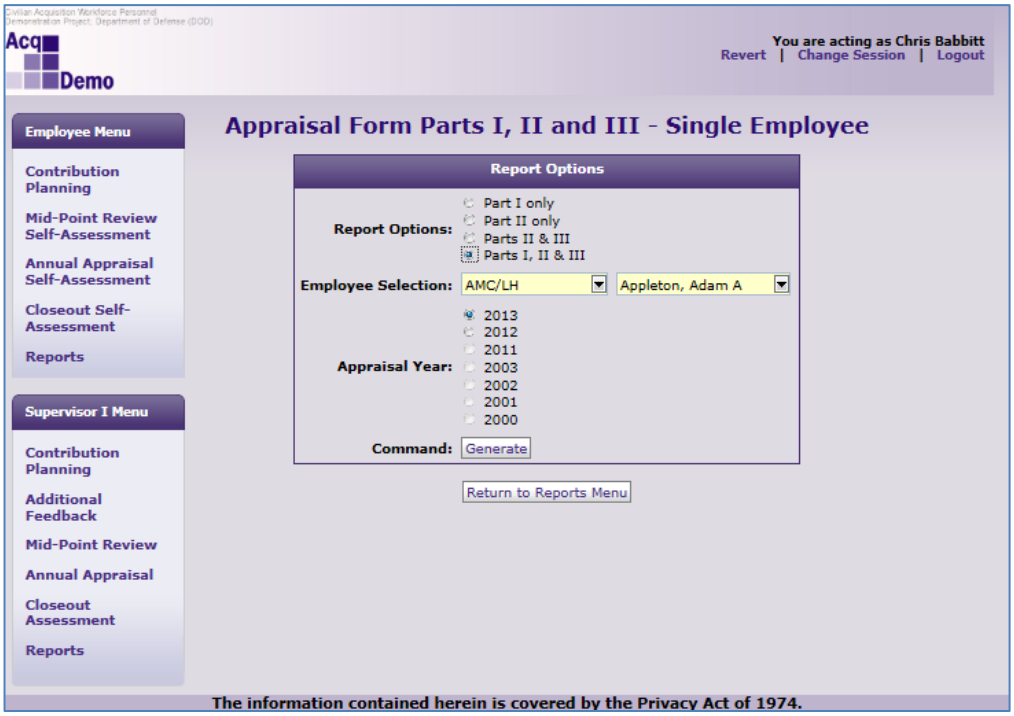
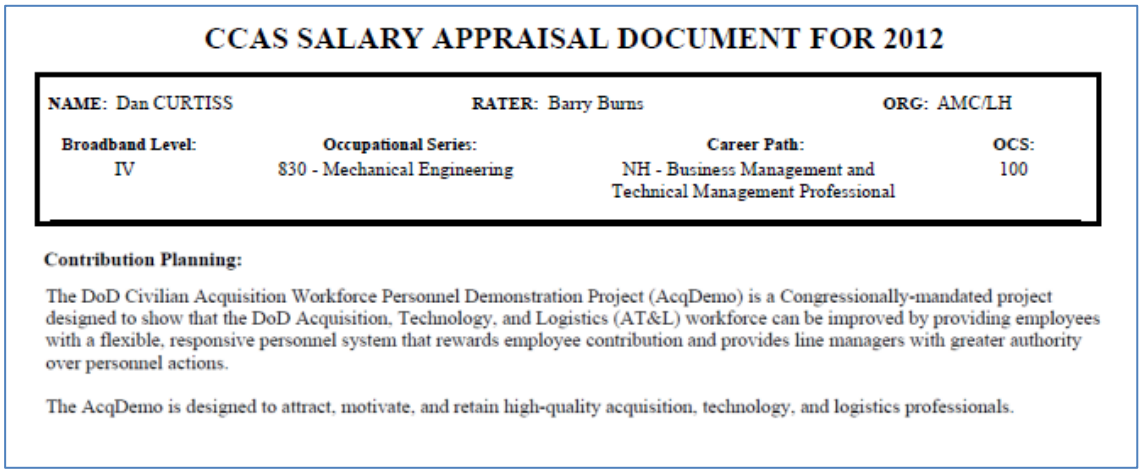


Figure 11-29: Appraisal Form Parts I, II and III – Single Employee Selection



CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS	RATER: Barry Burns	ORG: AMC/LH	
Broadband Level: IV	**Occupational Series:** 830 - Mechanical Engineering	**Career Path:** NH - Business Management and Technical Management Professional	**OCS:** 100

Contribution Planning:

The DoD Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo) is a Congressionally-mandated project designed to show that the DoD Acquisition, Technology, and Logistics (AT&L) workforce can be improved by providing employees with a flexible, responsive personnel system that rewards employee contribution and provides line managers with greater authority over personnel actions.

The AcqDemo is designed to attract, motivate, and retain high-quality acquisition, technology, and logistics professionals.

Figure 11-30: Appraisal Form Parts I, II and III Report, Contribution Planning

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

Part I: CCAS Salary Appraisal Form

Name:	Dan CURTISS	**Series:**	0830	**Appraisal Period:**	
CAS2Net ID:	4	**Broadband Level:**	IV	**From:**	01-OCT-11
Organization:	AMC/LHA	**Retained Pay:**	No	**To:**	30-SEP-12
Career Path:	NH	**Presumptive:**	None		

Discuss evaluation with employee and obtain signature confirming discussion. Signature of employee does not constitute agreement with CCAS appraisal.

Bob Arnold, Pay Pool Manager — **Date**

Date

Date

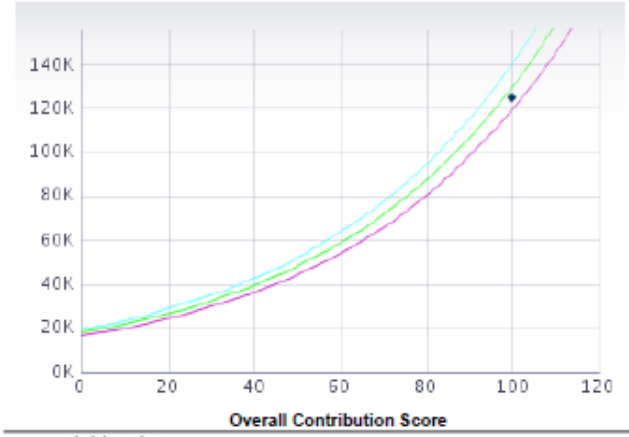
Employee Signature — **Date**

Appraisal Detail

Overall Contribution Score:	100	Upper Rail OCS	95
Next Year's Expected SPL OCS:	99	SPL OCS	98
Approved Rail Position	C2	Lower Rail OCS	102

Employee Contribution Pay Comparison Chart

The graph plots the Employee Appraisal relative to the standard pay line (SPL) and rails. The top and bottom lines are the **Upper and Lower Rails**. The middle line is the SPL. The point is the **Employee Appraisal**.



Compensation Detail

	$125,000	Current Rate of Base Pay		
+	$0	G Increase		
+	$2,532	CRI Increase		
	$127,532	**New Rate of Base Pay**		
+	$27,968	Locality Pay *	@	24.22%
	$155,500	**New Total Salary**		
	$1,079	Contribution Award		

*Locality pay has been reduced to cap total salary at the Executive Schedule Level IV salary cap.

Remarks

Privacy Act Statement (552a of 5 U.S.C.)
1. AUTHORITY: Section III.D, Federal Register Notice dated January 8, 1999.
2. PURPOSE: This form summaries the annual evaluation of an employee¿s contribution through CCAS assessment.
3. ROUTINE USE: This form is a computer-generated form that is produced for each employee and contains the overall contribution score and space for the signature of the PPM, the supervisor, and the employee. The original of this form will be maintained in accordance with agency procedures.
4. DISCLOSURE: The information contained within this form is personal in nature and is restricted to those with appropriate permissions. Information collected on this form may be used for statistical and impact analysis.

Figure 11-31: Appraisal Form Parts I, II and III Report, Part I (Page 1)

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

Part I: CCAS Salary Appraisal Form

Page 2

Name:	Dan CURTISS	**Series:**	0830	**Appraisal Period:**	
CAS2Net ID:	4	**Broadband Level:**	IV	**From:**	01-OCT-11
Organization:	AMC/LHA	**Retained Pay:**	No	**To:**	30-SEP-12
Career Path:	NH	**Presumptive:**	None		

Factor	Categorical Score	Final Score
Problem Solving	4H	100
Teamwork/Cooperation	4H	100
Customer Relations	4H	100
Leadership/Supervision	4H	100
Communication	4H	100
Resource Management	4H	100
OCS		100
Delta OCS	2	

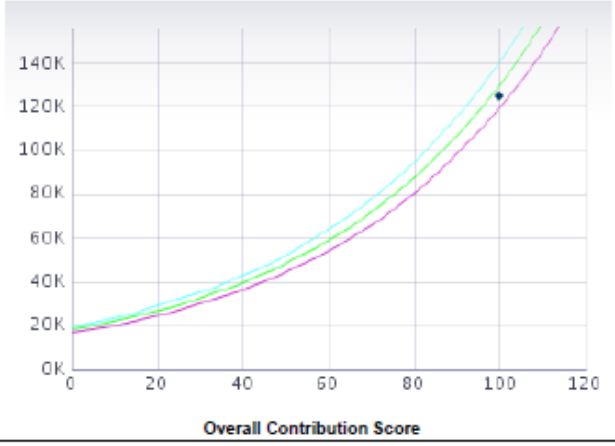


Figure 11-32: Appraisal Form Parts I, II and III Report, Part I (Page 2)

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS **RATER:** Barry Burns **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
IV	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	100

PART II Supervisor Assessment

DRAFT Assessment - not complete until finalized by Pay Pool Panel

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 None	4H	100
Teamwork/Cooperation None	4H	100
Customer Relations None	4H	100
Leadership/Supervision None	4H	100
Communication None	4H	100
Resource Management None	4H	100

Figure 11-33: Appraisal Form Parts I, II and III Report, Part II

CCAS SALARY APPRAISAL DOCUMENT FOR 2012

NAME: Dan CURTISS **RATER:** Barry Burns **ORG:** AMC/LH

Broadband Level:	Occupational Series:	Career Path:	OCS:
IV	830 - Mechanical Engineering	NH - Business Management and Technical Management Professional	100

PART III Employee Self-Assessment

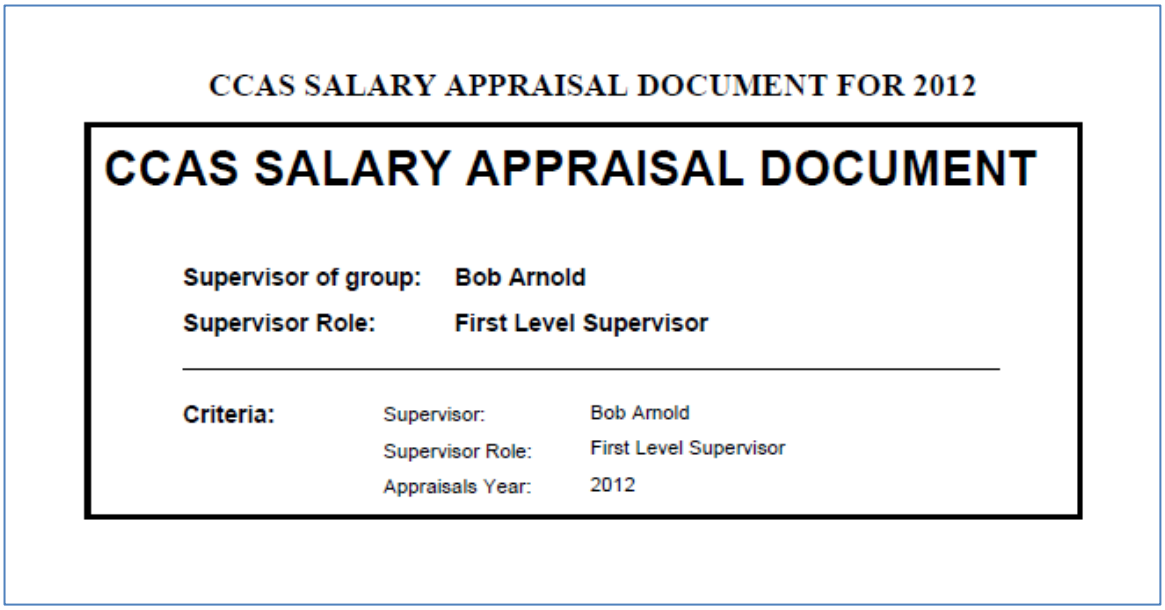
Problem Solving This is Dan Curtiss' self-assessment for the problem solving factor.
Teamwork/Cooperation This is my assessment for the Teamwork/Cooperation factor
Customer Relations
Leadership/Supervision
Communication
Resource Management

Figure 11-34: Appraisal Form Parts I, II and III Report, Part III

11.2.6 Appraisal Form Parts I, II and III – All Employees

- From the Supervisor Reports menu, select Appraisal Form Parts I, II and III – All Employees.
- CAS2Net displays Appraisal Form Parts I, II and III screen (see figure: Appraisal Form Parts I, II and III - All Employees Selection).
- Select supervisor name from the Supervisor Selection dropdown list (if Supervisor I runs the reports, his/her name is defaulted and no other names show in the dropdown list).
- Click "Generate" to produce the report.
- CAS2Net displays all employees' CCAS Salary Appraisal Document reports:
    - CCAS Salary Appraisal Document cover page: supervisor name, supervisor role, year of performance (see figure: Annual Appraisal Report Parts II and III – All Employees, cover page).
    - CCAS Salary Appraisal Document reports of all employees, each employee's report contains three parts: Part I – CCAS Salary Appraisal Form, Part II – Supervisor Assessment and Part III – Employee Self-Assessment (see figures: Appraisal Form Parts I, II and III Report, Contribution Planning ; Appraisal Form Parts I, II and III Report, Part I (Pages 1 and 2); Appraisal Form Parts I, II and III Report, Part II; and Appraisal Form Parts II and III Report, Part III).

Figure 11-35: Appraisal Form Parts I, 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 11-36: Annual Appraisal Report Parts I, II and III – All Employees, Cover Page

11.2.7 Mid-Point Review – Single Employee

- From the Supervisor Reports menu, select Mid-Point Review – Single Employee.
- CAS2Net displays Mid-Point Review – Employee screen (see figure: Sample Mid-Point Review Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- Click "Generate" to produce the report.
- CAS2Net displays Mid-Point Review report with the selected employee name print on the title (see figure: Mid-Point Review Report).

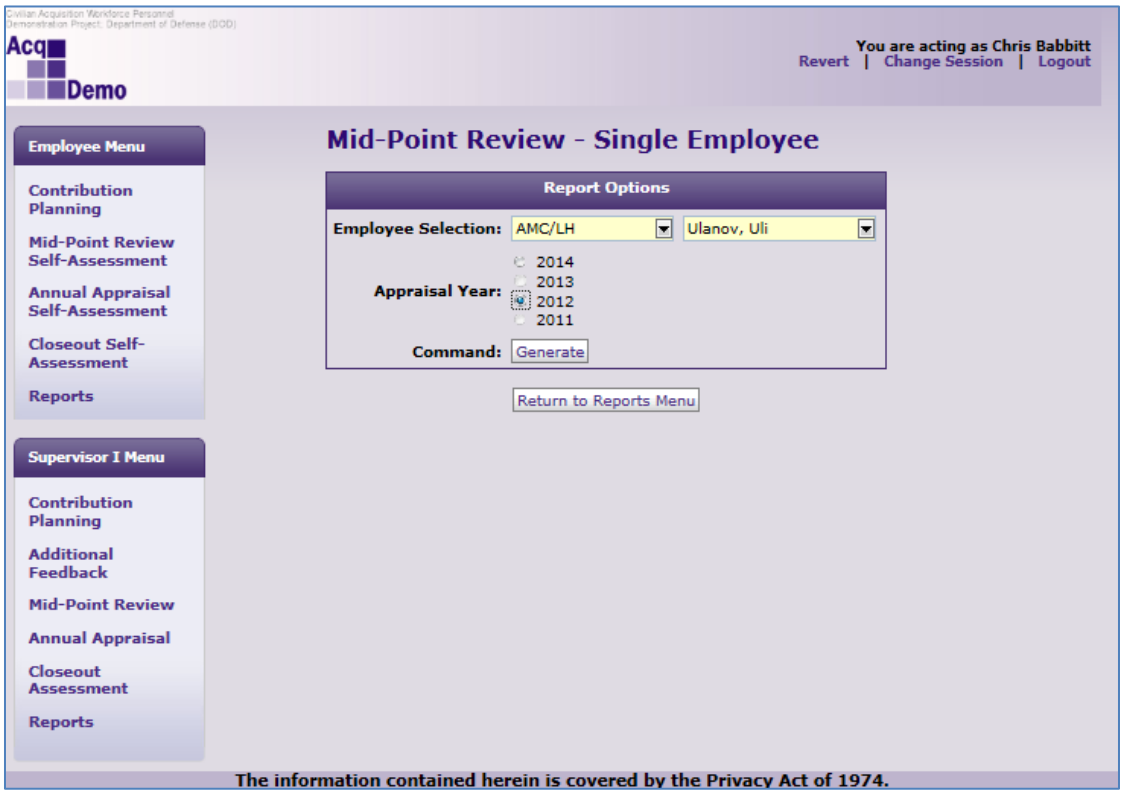


Figure 11-37: Mid-Point Review Report – Single Employee Selection

Mid-Point Review for Uli Ulanov
As of 09/11/13 08:50

Broadband Level:	Occupational Series:	Career Path:	Expected OCS:
II	301 - Specialist/Analyst	NH - Business Management and Technical Management Professional	42

Contribution Planning:

This is Uli's new Contribution Planning instance.

Employee Self-Assessment:

Problem Solving This is Uli Ulanov's Mid-Point Review Self-Assessment for 2013.
Teamwork/Cooperation
Customer Relations
Leadership/Supervision
Communication
Resource Management

Supervisor Assessment:

Problem Solving This is George Fites 2013 "problem solving" Mid-Point Review supervisor assessment for Uli Ulanov,
Teamwork/Cooperation
Customer Relations This is George Fites 2013 "customer relations" Mid-Point Review supervisor assessment for Uli Ulanov,
Leadership/Supervision
Communication
Resource Management

Method of Communication: Face to Face

Date Conducted: 09/11/13

Figure 11-38: Mid-Point Review Report

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).
- Click "Generate" to produce the report.
- CAS2Net displays Mid-Point Review reports of all employees, with each employee name print on the title of each employee Mid-Point Review report.

  (Note: All Employees report format is the same as Single Employee format, see figure: Mid-Point Review Report for example).

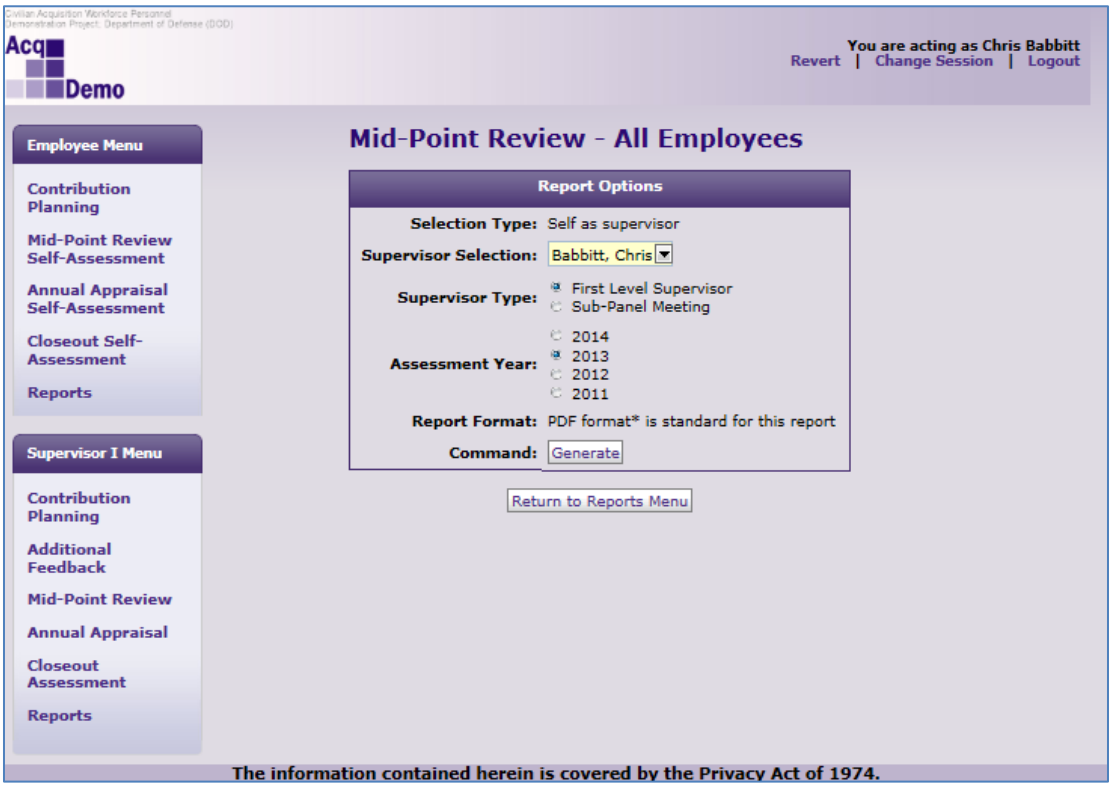


Figure 11-39: Mid-Point Review Report - All Employees Selection

11.2.9 Closeout Assessment – Single Employee

- From the Supervisor Reports menu, select Closeout Assessment – Single Employee.
- CAS2Net displays the Closeout Assessment – Single Employee screen (see figure: Closeout Assessment Report – Single Employee selection).
- Select employee from the Employee Selection dropdown list.
- Click "Generate" to produce the report.
- CAS2Net displays Closeout Assessment report with the selected employee name printed in the title (see figure: Closeout Assessment Report).

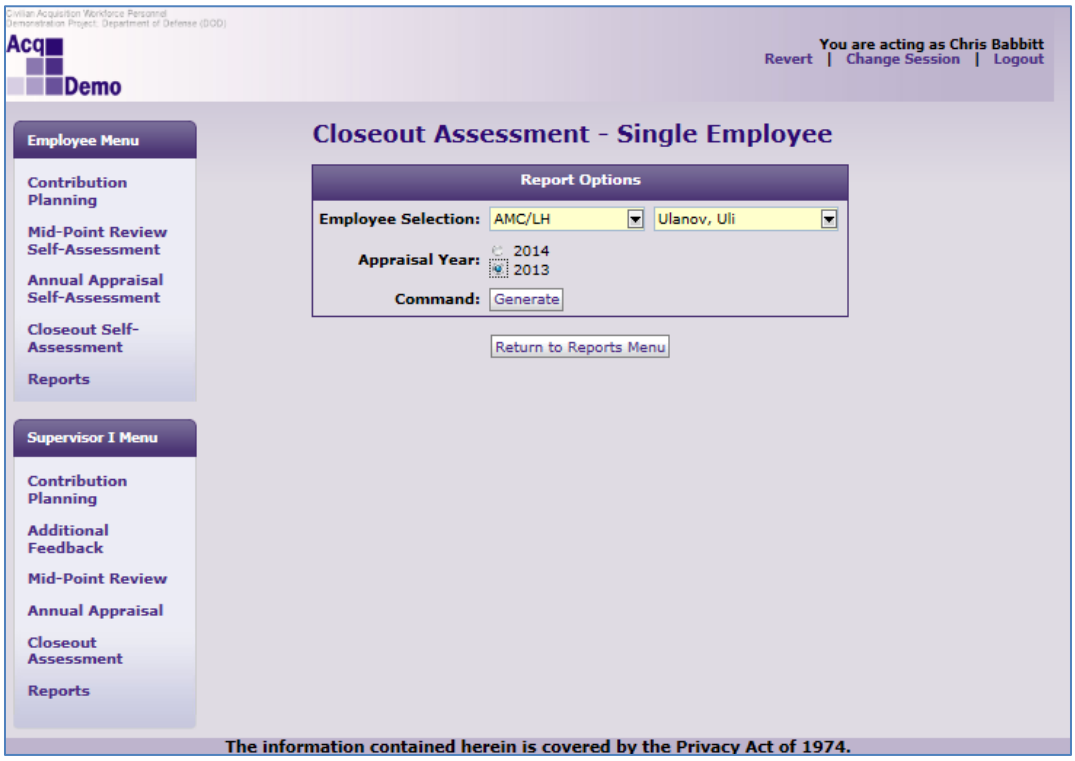


Figure 11-40: Closeout Assessment Report – Single Employee Selection

Closeout Assessment for Uli Ulanov

Year: 2013

First Level Supervisor: Chris Babbitt

Broadband Level:	Occupational Series:	Career Path:	Expected OCS Range:
II	334 - Computer Specialist	NH - Business Management and Technical Management Professional	48 - **51** - 55

Start Date: 10/01/2012 **End Date:** 05/03/2013 **As Of:** 09/26/13 12:09

Reason for Closeout Assessment: Change in Supervisor

Contribution Planning:
This is Uli Ulanov's Contribution Planning for 2013.

And this is Chris Babbitts' input to Uli's Contribution Planning for 2013.

Chris Babbitt modified the Contribution Planning text on June 17 at 16:10 p.m.

Overall Employee Self-Assessment:
Uli Ulanov's "overall" closeout review self-assessment.

Problem Solving Uli Ulanov's "problem solving" closeout review self-assessment.
Teamwork/Cooperation Uli Ulanov's "teamwork and cooperation" closeout review self-assessment.
Customer Relations Uli Ulanov's "customer relations" closeout review self-assessment.
Leadership/Supervision Uli Ulanov's "leadership and supervision" closeout review self-assessment.
Communication Uli Ulanov's "communication" closeout review self-assessment.
Resource Management Uli Ulanov's "resource management" closeout review self-assessment.

Supervisor Assessment:
Chris Babbitt's "overall" closeout review supervisor assessment

Problem Solving Chris Babbitt's "problem solving" closeout review supervisor assessment.
Teamwork/Cooperation Chris Babbitt's "teamwork and cooperation" closeout review supervisor assessment
Customer Relations Chris Babbitt's "customer relations" closeout review supervisor assessment.
Leadership/Supervision Chris Babbitt's "leadership and supervision" closeout review supervisor assessment.
Communication Chris Babbitt's "communication" closeout review supervisor assessment.
Resource Management Chris Babbitt's "resource management" closeout review supervisor assessment.

Method of Communication: **Date Conducted:**

Figure 11-41: Closeout Assessment Report

11.2.10 Closeout Assessment – All Employees

- From the Supervisor Reports menu, select Closeout Assessment – All Employees.
- CAS2Net displays Closeout Assessment – All Employees screen (see figure: Closeout Assessment - 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).
- Click "Generate" to produce the report.
- CAS2Net displays Closeout Assessment reports of all employees, with each employee name printed in the title of each employee Closeout Assessment report.

  (Note: All Employees report format is the same as Single Employee format, see figure: Closeout Assessment Report for example).

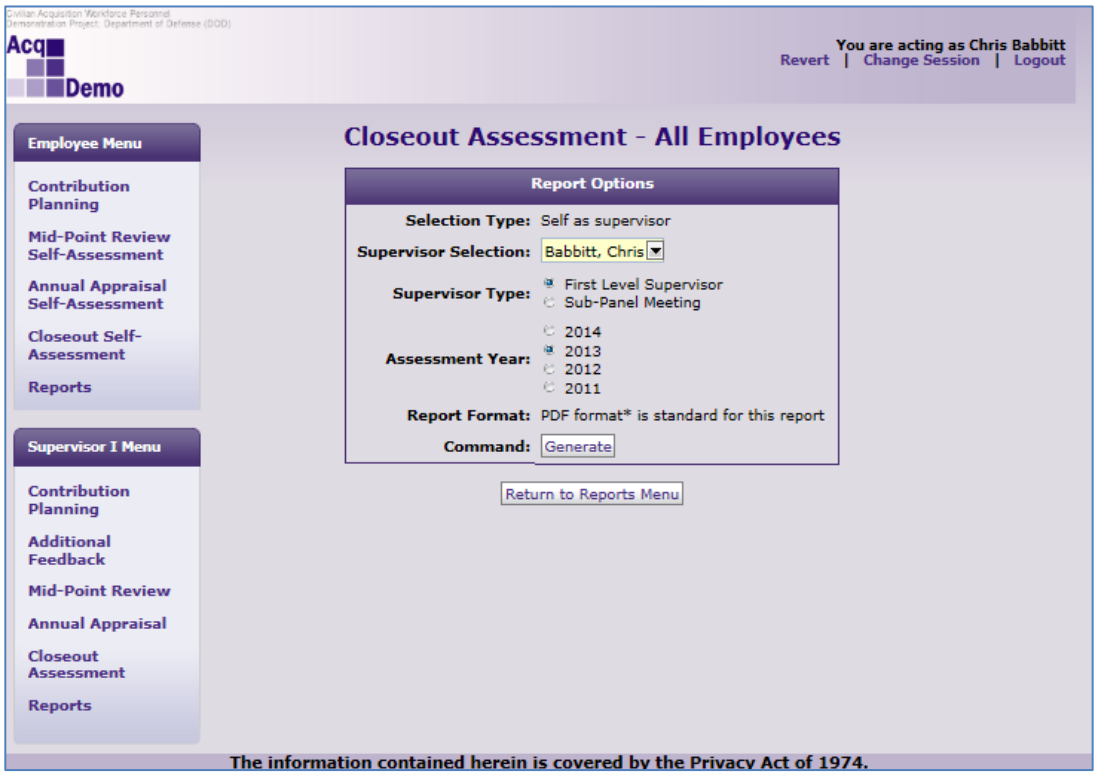


Figure 11-42: Closeout Assessment - All Employees Selection

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 11-43: 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.

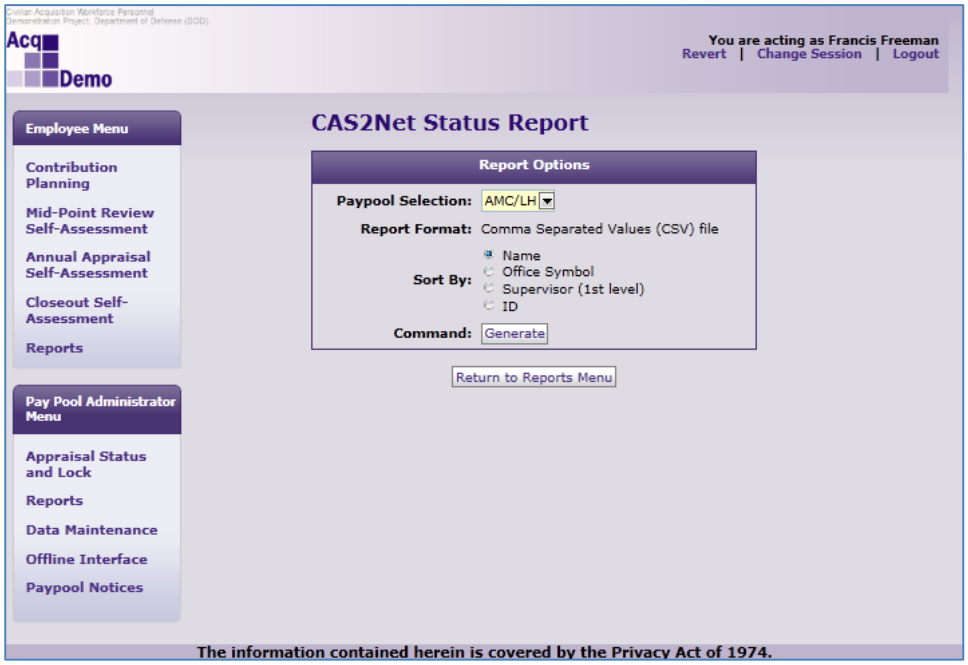
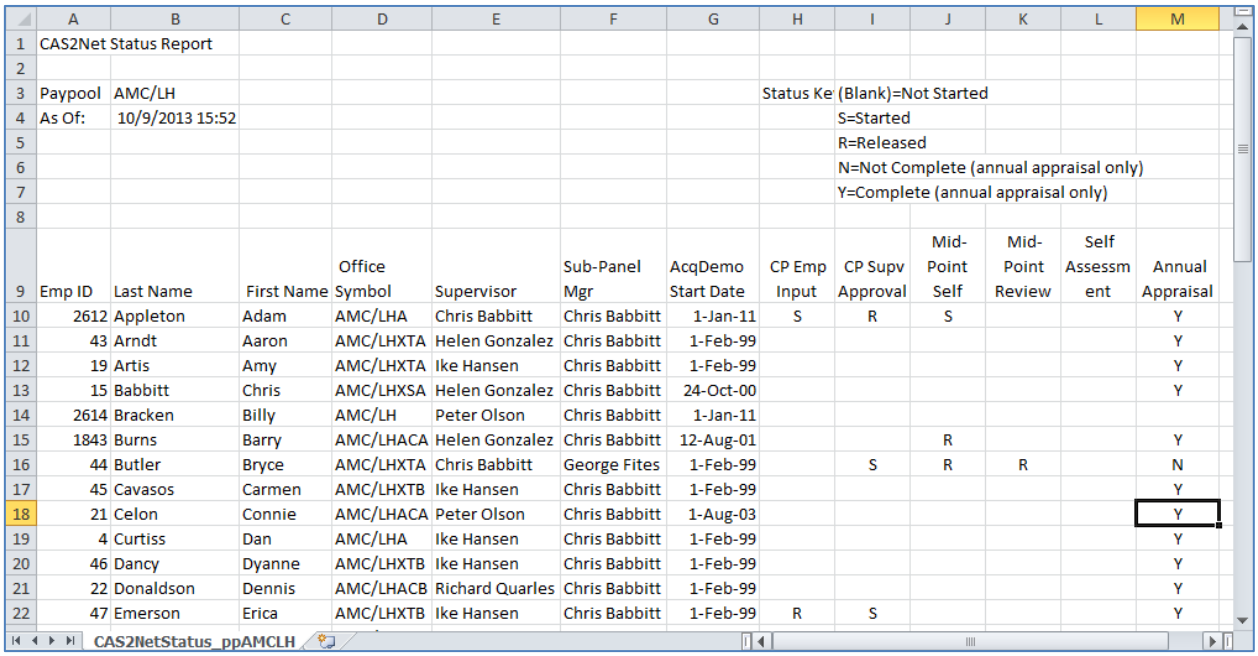


Figure 11-44: CAS2Net Status Report Selection



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	CAS2Net Status Report												
2													
3	Paypool	AMC/LH						Status Ke	(Blank)=Not Started				
4	As Of:	10/9/2013 15:52							S=Started				
5									R=Released				
6									N=Not Complete (annual appraisal only)				
7									Y=Complete (annual appraisal only)				
8													
9	Emp ID	Last Name	First Name	Office Symbol	Supervisor	Sub-Panel Mgr	AcqDemo Start Date	CP Emp Input	CP Supv Approval	Mid-Point Self	Mid-Point Review	Self Assessment	Annual Appraisal
10	2612	Appleton	Adam	AMC/LHA	Chris Babbitt	Chris Babbitt	1-Jan-11	S	R	S			Y
11	43	Arndt	Aaron	AMC/LHXTA	Helen Gonzalez	Chris Babbitt	1-Feb-99						Y
12	19	Artis	Amy	AMC/LHXTA	Ike Hansen	Chris Babbitt	1-Feb-99						Y
13	15	Babbitt	Chris	AMC/LHXSA	Helen Gonzalez	Chris Babbitt	24-Oct-00						Y
14	2614	Bracken	Billy	AMC/LH	Peter Olson	Chris Babbitt	1-Jan-11						
15	1843	Burns	Barry	AMC/LHACA	Helen Gonzalez	Chris Babbitt	12-Aug-01			R			Y
16	44	Butler	Bryce	AMC/LHXTA	Chris Babbitt	George Fites	1-Feb-99		S	R	R		N
17	45	Cavasos	Carmen	AMC/LHXTB	Ike Hansen	Chris Babbitt	1-Feb-99						Y
18	21	Celon	Connie	AMC/LHACA	Peter Olson	Chris Babbitt	1-Aug-03						Y
19	4	Curtiss	Dan	AMC/LHA	Ike Hansen	Chris Babbitt	1-Feb-99						Y
20	46	Dancy	Dyanne	AMC/LHXTB	Ike Hansen	Chris Babbitt	1-Feb-99						Y
21	22	Donaldson	Dennis	AMC/LHACB	Richard Quarles	Chris Babbitt	1-Feb-99						Y
22	47	Emerson	Erica	AMC/LHXTB	Ike Hansen	Chris Babbitt	1-Feb-99	R	S				Y

CAS2NetStatus_ppAMCLH

Figure 11-45: CAS2Net Status Report

11.3.2 Appraisal Status Report

Presents the status of appraisals within a pay pool.

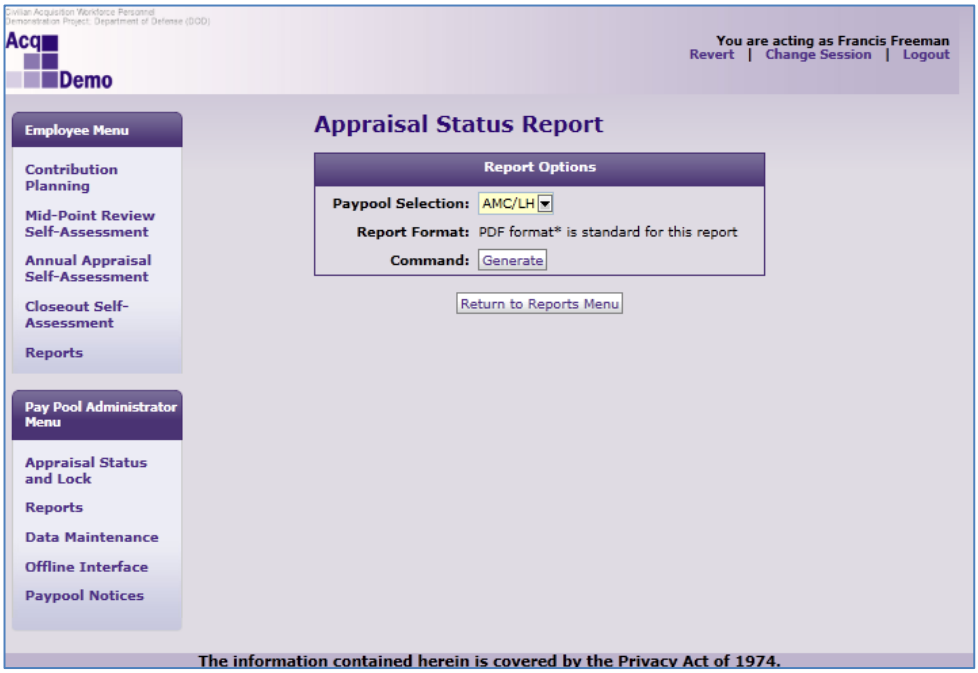
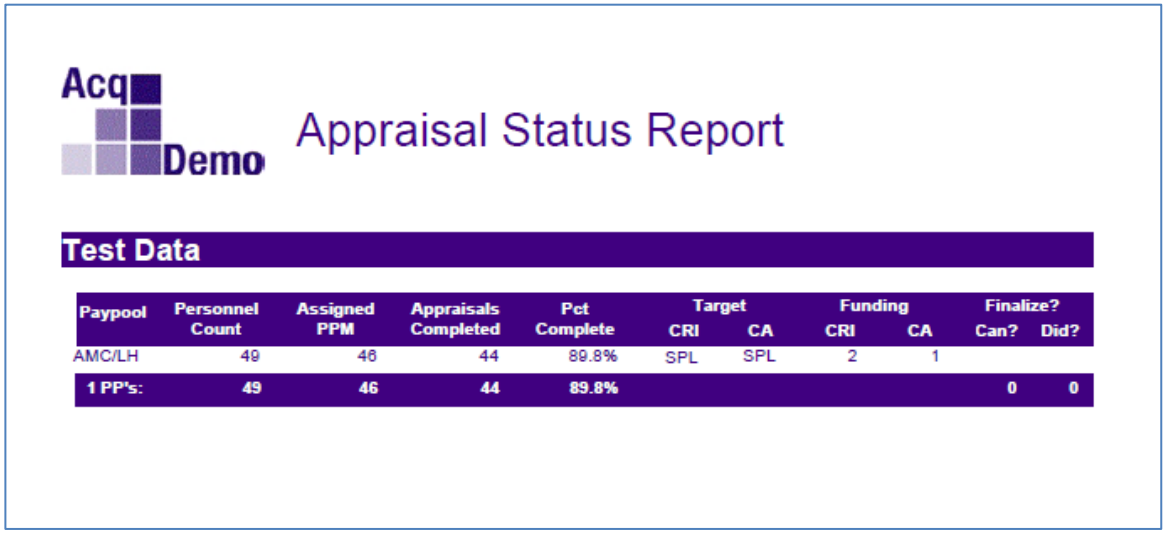


Figure 11-46: Appraisal Status Report Selection

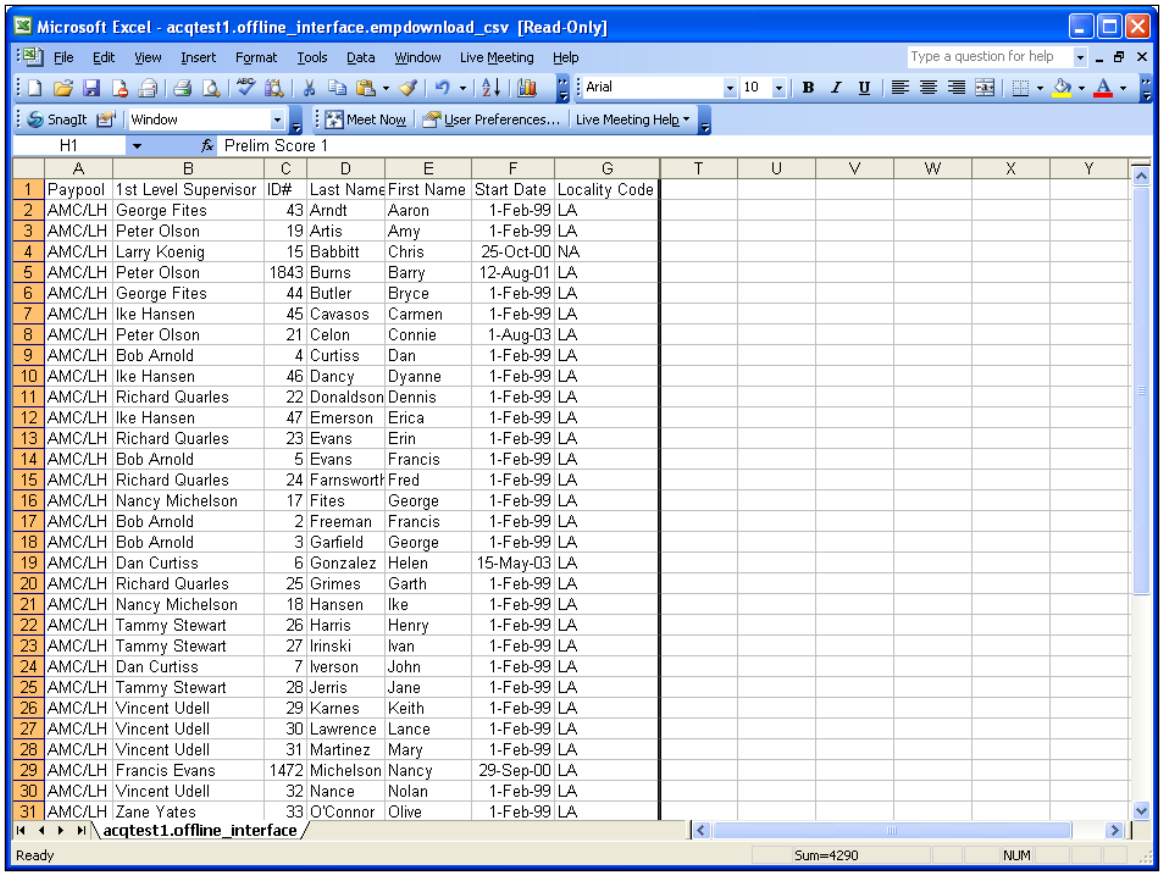


Paypool	Personnel Count	Assigned PPM	Appraisals Completed	Pct Complete	Target CRI	Target CA	Funding CRI	Funding CA	Finalize? Can?	Finalize? Did?
AMC/LH	49	46	44	89.8%	SPL	SPL	2	1		
1 PP's:	49	46	44	89.8%					0	0

Figure 11-47: 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
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 Koenig	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 11-48: 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 11-49: 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	Arndt	Aaron			0138	AMC/LHXTA	Circum (recertify)	N	NK	2	0322	$0	41	9L	n/a	01-FEB-99
19	Artis	Amy			3720	AMC/LHACA	None	N	NH	2	0318	$0	41	9L	n/a	01-FEB-99
15	Babbitt	Chris			0912	AMC/LHXSA	None	N	NH	3	0803	$0	99	9L	n/a	25-OCT-00
1843	Burns	Barry			6289	AMC/LHACA	None	N	NH	2	1515	$0	41	9L	n/a	12-AUG-01
44	Butler	Bryce			0219	AMC/LHXTA	None	N	NH	3	0025	$0	41	9L	n/a	01-FEB-99
45	Cavasos	Carmen			7986	AMC/LHXTB	None	N	NH	2	0246	$0	41	9L	n/a	01-FEB-99
21	Celon	Connie			4913	AMC/LHACA	Time	N	NH	3	0334	$0	41	9L	n/a	01-AUG-03
4	Curtiss	Dan			9047	AMC/LHA	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
46	Dancy	Dyanne			0943	AMC/LHXTB	None	N	NK	1	0322	$0	41	9L	n/a	01-FEB-99
22	Donaldson	Dennis			3941	AMC/LHACB	None	N	NK	2	0318	$0	41	9L	n/a	01-FEB-99
47	Emerson	Erica			8834	AMC/LHXTB	Circum (recertify)	N	NH	2	0341	$0	41	9L	n/a	01-FEB-99
23	Evans	Erin			3175	AMC/LHACB	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99
5	Evans	Francis			9045	AMC/LHX	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
24	Farnsworth	Fred			7422	AMC/LHACB	None	N	NH	2	0830	$0	41	9L	n/a	01-FEB-99
17	Fites	George			8173	AMC/LHXTA	None	N	NH	3	0896	$0	41	9L	n/a	01-FEB-99
2	Freeman	Francis			9153	AMC/LH	None	Y	NK	2	0318	$0	41	9L	n/a	01-FEB-99
3	Garfield	George			8079	AMC/LH	None	N	NJ	4	0856	$0	41	9L	n/a	01-FEB-99
6	Gonzalez	Helen			0075	AMC/LHAC	None	N	NH	4	0340	$0	41	9L	n/a	15-MAY-03
25	Grimes	Garth			5297	AMC/LHACB	None	N	NH	2	0850	$0	41	9L	n/a	01-FEB-99
18	Hansen	Ike			3651	AMC/LHXTB	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99
26	Harris	Henry			3813	AMC/LHADA	None	N	NH	2	0830	$0	41	9L	n/a	01-FEB-99
27	Irinski	Ivan			6297	AMC/LHADA	None	N	NK	3	0085	$0	41	9L	n/a	01-FEB-99
7	Iverson	John			1132	AMC/LHAD	None	N	NH	4	0830	$0	41	9L	n/a	01-FEB-99
28	Jerris	Jane			8347	AMC/LHADA	None	N	NH	3	0830	$0	41	9L	n/a	01-FEB-99

Figure 11-50: 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 11-51: Post Cycle Activity Report Selection

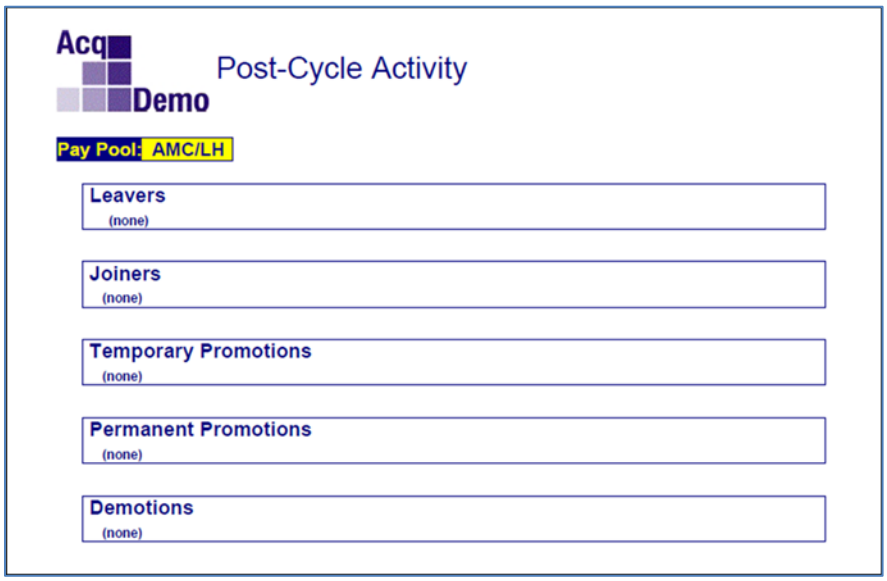


Figure 11-52: Post Cycle Activity Report

11.3.6 Supervisor Roster by Employee Report

Presents a list of employees and their supervisor.

Figure 11-53: Supervisor Roster by Employee Report Selection

Acq Demo

Supervisor Roster by Employee

Employee Name	Supervisor, Level 1	Sub-panel Supervisor	Paypool Manager
Arndt, Aaron, AMC/LHXTA	George Fites	Nancy Michelson	Bob Arnold
Artis, Amy, AMC/LHXTA			
Babbitt, Chris, AMC/LHXSA	Larry Koenig	Francis Evans	Bob Arnold
Burns, 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
Karnes, 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
Zurbriggen, Zack, AMC/LHXTA	George Fites	Nancy Michelson	Bob Arnold

Number of Employees: 49

Report run on: 18-SEP-2012 11:21:43

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Figure 11-54: 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 11-55: Supervisor Roster by Supervisor Report Selection

Acq Demo

Supervisor Roster

Paypool Manager	Sub-panel Supervisor	First Level Supervisor	Employee Name
Bob Arnold, AMC/LH	(none)	Bob Arnold	Curtiss, Dan , AMC/LHA
			Evans, Francis , AMC/LHX
			Freeman, Francis , AMC/LH
			Garfield, George , AMC/LH
	Bob Arnold	Dan Curtiss	Gonzalez, Helen , AMC/LHAC
			Iverson, John , AMC/LHAD
		Francis Evans	Michelson, Nancy , AMC/LHXT
	Dan Curtiss	Chris Babbitt	Hoang, Danielle , AMC/LH
		Helen Gonzalez	Quarles, Richard , AMC/LHACB
		John Iverson	Stewart, Tammy , AMC/LHADA
			Udell, Vincent , AMC/LHADB
			Yates, Zane , AMC/LHADC
		Peter Olson	Hummer, Hershel , AMC/LH
			Mucker, Mark , AMC/LH
	Francis Evans	Larry Koenig	Babbitt, Chris , AMC/LHXSA
		Nancy Michelson	Fites, George , AMC/LHXTA
			Hansen, Ike , AMC/LHXTB
	Helen Gonzalez	Eileen Daniels	Sorenson, Sarah , AMC/LHAC
		Peter Olson	Burns, Barry , AMC/LHACA
			Celon, Connie , AMC/LHACA
		Richard Quarles	Donaldson, Dennis , AMC/LHACB
			Evans, Erin , AMC/LHACB
			Farnsworth, Fred , AMC/LHACB
			Grimes, Garth , AMC/LHACB
	John Iverson	George Fites	Hoang, Andrew , AMC/LH
		Tammy Stewart	Harris, Henry , AMC/LHADA
			Irinski, Ivan , AMC/LHADA
			Jerris, Jane , AMC/LHADA
		Vincent Udell	Karnes, 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	Arndt, Aaron , AMC/LHXTA
			Butler, Bryce , 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 11-56: 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.

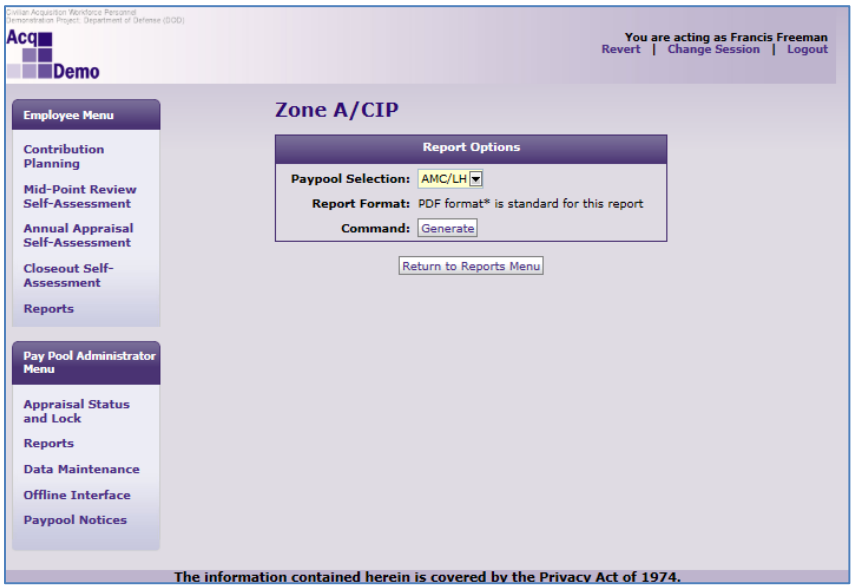
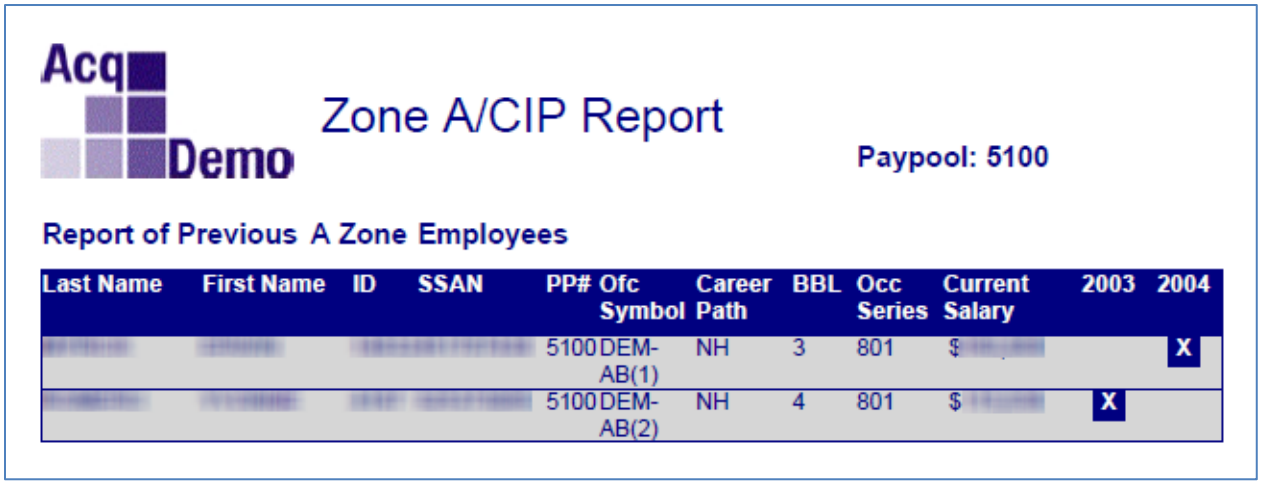


Figure 11-57: Zone A/CIP Report Selection



Last Name	First Name	ID	SSAN	PP#	Ofc Symbol	Career Path	BBL	Occ Series	Current Salary	2003	2004
[illegible]	[illegible]	[illegible]	[illegible]	5100	DEM-AB(1)	NH	3	801	$ [illegible]		X
[illegible]	[illegible]	[illegible]	[illegible]	5100	DEM-AB(2)	NH	4	801	$ [illegible]	X	

Figure 11-58: Zone A/CIP Report