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PURPOSE

CAS2Net is an online reporting system of the Contribution-based Compensation and Appraisal System (CCAS), a results-based, competency-linked broad banding and performance-based pay system. This document describes the features and capabilities of the Contribution-Based Compensation and Appraisal System Software (CAS2Net) and define the role of CAS2Net in supporting the Civilian Acquisition Workforce Personnel Demonstration Project (AcqDemo) of the United States Department of Defense (DOD).

SCOPE

CAS2Net supports the administration and management of the pay pool and planning, feedback, assessment, and reward activities that occur during the annual CCAS cycle.

This guide helps users get started with CAS2Net and serves as a reference whenever they need assistance with a particular function. This guide includes a section for each CAS2Net user role providing instruction on how to use the system to execute their assigned responsibility in the contribution appraisal workflow and/or pay pool administration. CAS2Net is comprised of a number of modules for planning, feedback, and assessments for all user roles in the CCAS process and also includes organization, CCAS and user management for administrators.

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<td>Overview</td>
<td>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 and the different conventions that will be seen throughout the document.</td>
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<td>General User Information</td>
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<td>Guest Rater</td>
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<td>to manage employee records and other modules available to Administrators.</td>
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OVERVIEW

CAS2Net supports the creation of contribution plans, additional feedback, and assessments and reward activities for the rating and payout cycle. The Contribution Plan module encourages collaboration between employees and supervisors to refine contribution and performance objectives. Additional Feedback and Mid-Point Assessment modules promote continuous communication and contribution and/or performance improvement. Closeout Assessments review employee contribution for partial year position assignments. The Annual Assessment module enables 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 supervisors’ evaluation and the generation of the employee salary increase and contribution award. After appraisals and payouts are final, employees and supervisors will sign the Salary Appraisal document within the Annual Assessment module. CAS2Net allows the ability for obtaining Guest Rater comments for matrixed employees. CAS2Net includes the ability to identify ACDP employees as well as an ACDP Assessment module to allow employees and supervisors to provide ACDP evaluations and progress.

This manual provides guidance for the Administrator on how to use CAS2Net to manage their organization pay pool, user records, and CCAS.

WHO SHOULD USE THIS GUIDE?

The CAS2Net User Guide is for Employees, Supervisors, Functional Reviewers, Guest Raters, Trusted Agents, Administrators and Super Users who are assigned these roles in CAS2Net to perform their respective responsibilities listed in Table below:

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<thead>
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<th>User Role</th>
<th>Description</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>A user who is assigned to an AcqDemo position.</td>
<td>Set the &quot;Is Demo Employee&quot; flag to &quot;Yes&quot; in the user profile.</td>
</tr>
<tr>
<td>Supervisor 1 / 2</td>
<td>A user who supervises AcqDemo employees. Supervisor 1 can enter/edit supervisor comments on Contribution Plan and assessments. Supervisor 2 can approve Contribution Plan and assessments based on pay pool’s settings in Organization Management.</td>
<td>Set the &quot;Can Be Supervisor&quot; flag to &quot;Yes&quot; in the user profile.</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Instructions</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Functional Reviewer (Optional)</td>
<td>A user who will serve as an additional reviewer for the organization. This role is identified by the component representatives. This is a “Read Only” permission in CAS2Net.</td>
<td>Set the &quot;Can Be Functional Reviewer&quot; flag to &quot;Yes&quot; in the user profile.</td>
</tr>
<tr>
<td>Guest Rater</td>
<td>A user who will provide assessment input for the consideration of the supervisor</td>
<td>Set the &quot;Can be Guest Rater&quot; flag to &quot;Yes&quot; in the user profile. Next select Guest Rater in the employee’s user profile &gt; Organization Information.</td>
</tr>
<tr>
<td>Trusted Agent</td>
<td>A user who will act in behalf of a Supervisor who may be unavailable to perform the supervisor function in CAS2Net.</td>
<td>Assign using the &quot;Trusted Agent&quot; link under &quot;Administrator&quot; in the left navigation menu.</td>
</tr>
<tr>
<td>Manager / Secondary Manager</td>
<td>A user who will have &quot;Read Only&quot; permissions in CAS2Net to review and / or print Employee and Supervisor inputs across the annual appraisal cycle. This role can be at the Component, Organization, Group, Pay Pool, or Sub-Panel level. &quot;Secondary Manager&quot; serves a backup when the primary &quot;Manager&quot; is unavailable to perform their CAS2Net duties.</td>
<td>Use the &quot;Organization Management&quot; link under &quot;Administrator&quot; in the left navigation menu. Navigate to the organizational level where the user needs permission for using the &quot;Sub Organization Levels&quot; section. Then click on the &quot;Add Role&quot; button in the &quot;User Roles&quot; section to select the user and the role you want to assign.</td>
</tr>
<tr>
<td>Administrator</td>
<td>A user who will have &quot;Update&quot; permissions in CAS2Net to configure Organization Structure, manage Annual Appraisal processes, manage user profiles (including employee data such as career path, broadband level, base pay, etc.), view/print reports, and view employee and supervisor inputs across the annual appraisal cycle.</td>
<td>Assigned by another Administrator and / or Super User using the &quot;Organization Management” link under Administrator as described above.</td>
</tr>
<tr>
<td>Super User</td>
<td>A user who has the same capabilities as the &quot;Administrator&quot;, with the additional functionality to impersonate any user within their assigned organization structure</td>
<td>Assigned by another Super User using the &quot;Organization Management” link under Administrator as described above.</td>
</tr>
</tbody>
</table>
CAS2Net enables Super Users and Administrators to manage their organization structure using the Organization Management function located in the Administrator menu. This capability allows them to define the organization structure with role assignments to ensure each user has the correct level of access. For example, the “Administrator” role can be assigned at any level in the organization structure to allow that user to perform the role for all records assigned to that organization and below. If you are assigned as an “Administrator” at any level above a pay pool, you can navigate through your organization structure in the “Sub Organization Levels” panel to get to the pay pool to which you want to assign a user. The pay pool level within the organization structure is identified in the “Organization Details” panel when the “Is Pay Pool” flag is set to “Yes”. Once you navigate through the organization structure to the pay pool, you will scroll down to click the “Add Role +” button on the “User Roles” panel to select the user, and role you want to assign. In this case, you will select the user and choose the “Administrator” role.

Similarly, to assign a user to a sub-panel role, navigate through the organization structure until you get to the sub-panel level. The sub-panel level is identified by the location in the organization structure. Sub-panels are located in the organization structure below the pay pool level.

Below is an example of an organization hierarchy structure:

The example above shows how pay pool level can either be directly under a group level or a component level. For instance if you have Administrator access at the group level, you will have the Administrator access to the pay pool and sub-panels assigned below your group. In this example, “WHS-WHS (5201-5202)” Group Administrator will have access to WHS-WHS (5201-5202)” pay pool and sub-panels (5201-WHS AD) and (5202-DTMRC)
Here is example of an administrator at a group level. This group administrator will have access to “SSP Navy Strategic Systems Program” group and all pay pools/sub-panels assigned below this group.

**ACCESS AND AUTHORIZATION**
User access to CAS2Net requires successful CAC authentication 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 supervisor will see the menus available to both assigned roles.

**OWNERSHIP OF CONTRIBUTION APPRAISAL AND REVIEW WORKFLOW**
Each employee is assigned to one pay pool in CAS2Net and has assigned officials for each supervisory level (i.e. Supervisor 1, Supervisor 2, and Manager). The assignment of supervisors to employees is to control access to employee appraisal by assigned officials only. The administrators assigned to pay pools gives them access to rating data of all employees within the pay pool, and the ability to execute a Bulk Add to import multiple new users. Super Users have access to all employee records available at their level of assignment, such as group, have the same functionality as the administrator, and can assume any CAS2Net user role in that group to execute a CAS2Net function.

**CAS2NET CONVENTIONS**
CAS2Net implements common navigation conventions that are familiar to most website users.
The *Smart Search* function allows to search for fields just by entering leading letters or words. This Smart Search feature allows users to narrow the results of a table search automatically as they type search criteria for each column. This helps pull data from a large number of records with minimum time and effort.

For example, the screenshot below shows where the administrator can search for Mandatory Objectives by entering leading letters into the “Search” box.

Movement among web pages is done by clicking on links. A link references another web page – links are usually underlined or bolded 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.

Movement from page to page can be very quick or very slow, depending on the amount of traffic on the path the data for the page must travel. It is possible for information packets to become “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 the AcqDemo CAS2Net Help Desk. The contact information is ALTESS Service Desk at 1-800-981-3234 or send an email to usarmy.radford.peo-eis.other.service-desk@mail.mil
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LOGIN/LOGOUT

While CAS2Net is hosted over internal Army servers, you can access it from both internal and external networks. Once connected, you must have a Common Access Card (CAC) to login. Contact your administrator if you have issues accessing the site.

To sign in:

1. Go to https://cas2net.army.mil on your web browser; Click I Agree

2. Click CAC Login

3. Select valid CAC digital certificate to authenticate user information; Click OK
4. In the **Windows Security** dialog, enter CAC pin

5. Click **OK**

Landing page upon login: **Menu> Home**

CAS2Net navigation menu and panel items vary based on the role/s assigned to you by your pay pool administrator. Depending on what role/s you’ve been assigned, CAS2Net is customized to your user role, i.e., employee, supervisor (level 1 and level 2), manager (sub-panel and/or pay pool manager, trusted agent, administrator, etc. Each user role will have a different set of panels; points of contact, user notifications, and dashboards.

1. The navigation menu is based on the assigned user role and the tasks associated with the role
2. The panels are either informational or actionable tasks for the user.

To sign out:
1. Click on your name at the top right corner of the page to expand dropdown
2. Click Log Out

EDIT PERSONAL PROFILE

Your CCAS is important to us and we do our very best to maintain accurate information in CAS2Net. To ensure your user profile information is correct or to make edits to some general profile information, we recommend you check your profile twice a year.

To review and/or edit your profile upon login:
1. Click on your name at the top right corner of the page to expand dropdown
2. Click Edit Profile
3. In **Edit Profile**, you can update information in the **General User Information** panel yourself. All other panels are read-only. If read-only (greyed out) items hold incorrect information, contact your pay pool administrator to correct the information.

4. Click **Save** to save your edits.
ROLE BASED MENU

Navigation panel items vary based on the role/s assigned to you by your pay pool administrator. Depending on what role/s you’ve been assigned, you may see one or more of the following menu items in your CAS2Net portals:

Organization Roles
Manager
Secondary Manager

Administrator
Super User

Current Cycle Menu

End of CCAS Cycle Menu
<table>
<thead>
<tr>
<th>Role</th>
<th>Menu Content</th>
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<tr>
<td>Employee</td>
<td>Contribution Plan, Midpoint Assessment, Annual Assessment, Additional Feedback, Archived Appraisals, Reports</td>
</tr>
<tr>
<td>ACDP Employee</td>
<td>Contribution Plan, Annual Assessment, ACDP Assessment, Additional Feedback, Archived Appraisals, Reports</td>
</tr>
<tr>
<td>ACDP Approving Official</td>
<td>ACDP Assessments</td>
</tr>
<tr>
<td>Functional Reviewer</td>
<td>Contribution Plans, Midpoint Assessments, Annual Assessments, Closeout Assessments, Archived Appraisals, Reports</td>
</tr>
<tr>
<td>Role</td>
<td>Menu Items</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Guest Rater</td>
<td>Midpoint Assessments, Annual Assessments, Closeout Assessments</td>
</tr>
<tr>
<td>Trusted Agent (Same as the Supervisor that user is the Trusted Agent)</td>
<td>Contribution Plans, Midpoint Assessments, Annual Assessments, Additional Feedback, Closeout Assessments, Grievances, ACDP Assessments, Archived Appraisals, Reports</td>
</tr>
</tbody>
</table>
Home > Index > Notifications

CAS2Net relays notifications within the system Menu > Home > Index page via CAS2Net and email (sample emails are at the end of the chapter).

To view notifications within the CAS2Net site, go to:

1. Menu > Home > Index
2. The following panels make up CAS2Net notifications:
3. **System Notifications** - relayed to all users (e.g., release notes, system maintenance schedule, and more)
4. **User Notifications** - Update items that only pertain to you and your role(s) in CAS2Net (e.g., appraisal approval, return, rejection, and more.)

Navigation panel items vary based on the role/s assigned to you by your pay pool administrator. Depending on what role/s you’ve been assigned, you may see one or more of the following menu items in your CAS2Net portals.
If you need assistance, CAS2Net provides a list of contacts. It is encouraged that your first point of contact be your supervisor 1 or pay pool administrator(s). Contact information is located in Menu > Home > Index.
Additional contacts are listed under **Menu > Home > Contacts**.

For technical assistance contact **PD ALTESS Service Desk** (1-800-981-3234)

**EXAMPLES OF EMAIL NOTIFICATIONS**

CAS2Net will send an email to the user with approval authority (*Supervisor 1 and Supervisor 2*) and email on action returned to Employee and Supervisor 1, i.e., *contribution plan, midpoint, closeout, and annual*. 
At FAQs is a list of frequently asked questions (FAQs) and answers on a particular topic. The answers are from the DoD perspective based on the Federal Register Notice and Operating Guide. For pay pool unique questions and concerns should be addressed to your administrators. See Points of Contact for listing of administrators. FAQs panel items vary based on the role/s assigned to you by your pay pool administrator. Depending of what role/s you’ve been assigned, you may see one or more of the following menu items in your FAQs panel.

1. Select a Topic, click « for picklist of topics
2. Select preferred topic

3. Select/click on question

4. View answer
5. Click Done when finished

Home > ABOUT
Navigate to Menu > Home > About for description of the AcqDemo software support system.

Home > CONTACT
If you need assistance, CAS2Net provides a list of contacts. It is encouraged that your first point of contact be your supervisor 1 or pay pool administrator(s). Contact information is located in Menu > Home > Contact.
Home > What’s New

The What’s New page provides information on the latest software change(s) to CAS2Net.

If you are new to AcqDemo and CAS2Net, you may only see a fewer or no items may see few or no in Menu > Home > What’s New.
CAS2Net strictly enforces a 15 minute timeout on inactive sessions. Such measures must be implemented to remain compliant with policies set forth by the DoD.

While this may be problematic for users entering or updating assessments, CAS2Net includes features to monitor and notify you of your user session.

> Session refreshes automatically upon navigation from one CAS2Net page to another

CAS2Net employs the following features/action items to prevent data loss:
Running Session Countdown Timer on top of pages to keep user informed of remaining time before session timeout. There are two options to continue or refresh your session.

Pop-up notification dialog if session is due for timeout in a minute or less.
- Click **Refresh Your Session**

Click to refresh option for user in **Menu > Home > Refresh Session**

Every multi-line text box set to automatically save user input in 5 minute (300 seconds) interval.

To prevent data loss, type out text in a separate Word document, copy it, then paste it into CAS2Net multi-line text box.
EMPLOYEE

OVERVIEW

CONTRIBUTION PLAN

General Information Panel

Contribution Planning Panel

Mandatory Objectives

Enter Individual Objectives Narrative

Enter Objectives Into A Single Textbox

Enter Objectives By Factor

Contribution Plan Returned By Supervisor 1

EMPLOYEE MIDPOINT ASSESSMENT

General Information Panel

Contribution Planning Panel

Job Achievement And/Or Innovation, Communication And/Or Teamwork, Mission Support Panel

Enter Midpoint Assessment Narrative

Midpoint Assessment Returned By Supervisor 1

EMPLOYEE ANNUAL ASSESSMENT

General Information Panel

Current Contribution Plan Details Panel

Apply CA Toward Time Off
Job Achievement And/Or Innovation, Communication And/Or Teamwork, Mission Support Panel 53
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Initiate Grievance 75
Compose Grievance 76
Grieve Assessment Score 76
Grieve Supervisor Assessment 78
Attach Supporting Files 81
Withdraw Grievance 83
Grievance Returned By Supervisor 84
OVERVIEW

This section pertains to users assigned the Employee role within CAS2Net. It provides a functional overview and guidance for every item listed under the employee drop-down panel in the CAS2Net navigation menu.

Modules listed under Menu > Employee include:

- Contribution Plan
- Midpoint Assessment
- Annual Assessment
- Additional Feedback
- Archived Appraisals
- Closeout Assessment - only visible once supervisor initiates it
- Reports

CONTRIBUTION PLAN

Contribution Plan page lets you create, modify and submit your individual employee objectives for the current rate cycle.

After submitting your plan narrative, no further changes are permitted unless your supervisor initiates a modification for the plan.

To access your contribution plan, go to:
Menu > Employee > Contribution Plan

Contribution Plan page overview:
1. Contribution plan **status**

2. **General Information** panel

3. **Contribution Planning** panel

4. **Copy Objectives from Previous Year** button - Option to copy objectives from previous plan if you have a previously approved plan from last year.

5. **Job Achievement and/or Innovation, Communication and/or Teamwork, Mission Support factor button tabs**
   
   a. It is possible that you don’t see the factor button tabs on your screen.
   
   b. Based on your local business rules on whether or not to use the three factors to develop objectives, your contribution plan will have either two or three panels:

6. Action button to **Cancel** (will remove all text input without saving),

7. Action button to **Save** (will retain all text input) and/or

8. Action button to **Submit to Supervisor 1** (will retain all text input upon sending to the supervisor).

**GENERAL INFORMATION PANEL**
The **General Information** panel has the basic information on the user. For your contribution plan, remember your 1. Career Path, 2. Broadband Level, and 3. Expected OCS and Range as you develop your objectives.

**CONTRIBUTION PLANNING PANEL**

The **Contribution Planning** panel is for the documentation of your objectives for rating year.

If this is your first year, your Contribution Planning panel will look like this.

If you have a previously approved contribution plan from last year, you have the option to Copy Objectives from Previous Plan from clicking on the blue button.

Clicking on ▶ will open the panel, and ▶ will close it.

The **Contribution Planning** panel **Fiscal Year** list for first year users and for users with multiple plans.

**MANDATORY OBJECTIVES**
Mandatory Objectives are additional objectives in CAS2Net set by your Pay Pool Administrator based on your organization’s business rules.

- Not all organizations have Mandatory Objectives; it is possible that you don’t see a Mandatory Objectives box on your screen.
Enter Individual Objectives Narrative

It is important to understand that your screen reflects how your pay pool is configured by your pay pool administrator. You may have 3 separate text boxes to enter your objectives for each one of the 3 factors, or just one text box for overall individual objectives.

- If you see Job Achievement and/or Innovation, Communication and/or Team Work, and Mission Support above the individual objectives text box on Contribution Plan page, see the section Enter objectives by factor

- Otherwise, see Enter Objectives into a Single Text Box

Enter Objectives Into A Single Textbox

To enter your individual objectives, go to:

1. Menu > Employee > Contribution Plan
2. Enter objectives narrative in the Individual Objectives text box
3. If you had an approved plan from last year and want to copy objectives from the previous plan, click **Copy Objectives from Previous Plan**.

4. Click **Save** at any time to save your progress
   a. While CAS2Net will Auto-Save after 5 minutes of inactivity, a best practice is to write out objectives in a Word document, copy document text and paste into the objective text box. If you decide to enter objectives directly into CAS2Net, take note the auto-save interval (300 seconds = 5 minutes) reminder below the Individual Objectives textbox.

5. When you're ready to submit your objectives narrative to your supervisor, click **Submit to Supervisor 1**

! **Note:** After submitting your plan, you’ll have read-only access to it unless your supervisor decides to send it back to for modification.

6. Upon submitting to supervisor 1, you will be asked. Click **Yes** to submit

---

**Enter Objectives By Factor**

Menu > Employee > Contribution Plan
1. If you had an approved plan from last year and want to copy objectives from the previous plan, click **Copy Objectives from Previous Plan**

and you will be asked.

2. Click **Job Achievement and/or Innovation**

3. Click the Factor Description link to view the description details for the factor tab selected

4. Enter contribution and performance objectives in the textbox for **Job Achievement and/or Innovation** selected

5. Each factor objective text box has a character limit of 4,000
6. Note the **Auto-Save** timer below the Individual Objectives text box. While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write out objectives in a Word document, copy document text and paste into the objective text box. If you decide to enter objectives directly into CAS2Net, take note the auto-save interval (300 seconds = 5 minutes) reminder below the Individual Objectives textbox.

7. Click **Save** button at any time to save your progress

8. When you’re ready to submit your objectives narrative to your supervisor, click **Submit to Supervisor**

9. Upon submitting to supervisor 1, you will be asked. Click **Yes**

10. **Action Result!** The data you submitted has been saved.

11. Note Contribution Plan status **Submitted to Supervisor 1**

12. The **Contribution Plan** is read-only
CONTRIBUTION PLAN RETURNED BY SUPERVISOR 1

Contribution Plan may be returned by the supervisor. Reasons for the return may include but are not limited to clarify the objective, change in employee duties or assignments.

- After submitting the plan, you’re limited to read-only access.
- While only your supervisor can return the plan, you may request your supervisor to return it for your revisions and/or additions.
- If the supervisor returns the plan for employee modification, you’ll receive a message via email and within CAS2Net (Menu > Home > Index under User Notifications panel).
Your supervisor will reach out and communicate reasons/need for plan modifications so you can update and resubmit it accordingly. Follow steps highlighted Enter Individual Objectives Narrative to guide you through the employee objectives narrative entry process.

**EMPLOYEE MIDPOINT ASSESSMENT**

Employee **Midpoint Assessment** takes place mid cycle year (April/May). It helps identify and document employee progress or deficiency as defined by objectives in their respective contribution plan.

**Note:** Employees aren’t rated in the midpoint assessment.

**Midpoint Assessment** process overview:

1. Employee submits assessment write-up
2. Supervisor reviews submitted assessment. Upon review, the supervisor can decide to:
   a. Write the supervisor assessment and communicate the results to employee
   b. Return the assessment for employee edit
   c. Supervisor and employee collectively review assessment
   d. Supervisor records the date and method of communication (face-to-face meeting, tele-conference, video-conference, email, or other) for the collective review on CAS2Net

To access your **Midpoint Assessment** page, go to:

**Menu > Employee > Midpoint Assessment**

**Midpoint Assessment** page overview:

1. Status of the Midpoint Assessment
2. **General Information** panel

3. **Contribution Planning** panel

4. **Job Achievement and/or Innovation** factor for the midpoint assessment

5. **Communication and/or Teamwork** factor for the midpoint assessment

6. **Mission Support** factor for the midpoint assessment

7. Action button to **Cancel** (will remove all text input without saving)

8. Action button to **Save** (will retain all text input)

9. Action button to **Submit to Supervisor 1** (will retain all text input upon sending to the supervisor)

**GENERAL INFORMATION PANEL**

The **General Information** panel has the basic information on the user. As you develop the objectives for your contribution plan, know and understand what are required for your:

1. **Career Path,**

2. **Broadband Level,** and

3. **Expected OCS and Range**

**CONTRIBUTION PLANNING PANEL**

Depending on your local business rules, your Contribution Planning panel may have mandatory objectives
JOB ACHIEVEMENT AND/OR INNOVATION, COMMUNICATION AND/OR TEAMWORK, MISSION SUPPORT PANEL

Midpoint assessment will be completed for each factor. Completion of the midpoint assessment are strongly encouraged and will be in accordance with local business rules.

If you click on the **Factor Descriptor** under any of the factor button, you will see the Expected Contribution Criteria, discriminators, and descriptors for the selected factor.
These baseline criteria form the basis from which specific contribution expectations, standards, goals, or objectives are assessed.

The Descriptors are narrative statements that are written at increasing levels of complexity, scope, and employee contribution. They are meant to correspond with the broadband levels (I/1, II/2, III/3, and IV/4), and their score ranges for the associated ranges of basic pay for appraisal purpose. Descriptors are not to be used individually to assess contributions, but rather are to be considered as a group to derive a single evaluation of each factor.

The discriminators refine the descriptors to help define the type and complexity of work; degree of responsibility; and scope of contributions that need to be ultimately accomplished to reach the highest basic pay potential within a broadband level for an employee’s assessment.
Review your General Information panel to determine your career path (NH, NJ, or NK), broadband level (I/1, II/2, III/3, and IV/4), expected OCS and range then align them to the level in the factor Descriptors to help you complete your assessment narrative.

**ENTER MIDPOINT ASSESSMENT NARRATIVE**

Upon submission, you have read-only access to your Midpoint Assessment unless your supervisor decides to return it for your edits.

You cannot enter **Midpoint Assessment** narrative until your **Contribution Plan** is submitted to and approved by your supervisor. Depending on your pay pool business rules, your midpoint assessment may also require supervisor II approval. If your contribution plan was not approved, you'll see the error below:
To enter your Midpoint Assessment narrative, go to:

1. **Menu > Employee > Midpoint Assessment**

2. **Click Job Achievement and/or Innovation**

3. **Enter assessment narrative in the textbox for Job Achievement and/or Innovation**
4. Click **Save** at any time to save your progress

5. When you’re ready to submit your objective narrative, click **Submit to Supervisor**

6. Click **Yes**

7. **Action Result!** The data you submitted has been saved.

8. Note **Midpoint Assessment** status **Submitted to Supervisor**

9. The **Midpoint Assessment** is read-only
MIDPOINT ASSESSMENT RETURNED BY SUPERVISOR 1

Midpoint Assessment may be returned by the supervisor. Reasons for the return may include but are not limited to clarify your assessment, additional contribution, add performance achieved or expected.

1. After submitting the assessment, you’re limited to read-only access.

2. While only your supervisor can return the assessment, you may request your supervisor to return it for your revisions and/or additions.

3. If the supervisor returns the assessment, you’ll receive a message via email and within CAS2Net (Menu > Home > Index under User Notifications panel).

Unless your supervisor returns the assessment, you’re limited to read-only access for your Midpoint Assessment after submission.

- If the assessment is returned by your supervisor, you’ll receive notifications via email and CAS2Net (Menu > Home > Index under User Notifications panel).

- Note the Midpoint Assessment status change

- Your supervisor will reach out and communicate the reasons/need for modifications so you can update and resubmit the assessment. Follow steps highlighted Enter Midpoint Assessment Narrative if your supervisor returns your assessment.
When you're ready to submit your objective narrative, click **Submit to Supervisor 1**

Click **Yes**

**Action Result!** The data you submitted has been saved.

Note **Midpoint Assessment** status **Submitted to Supervisor 1**

The **Midpoint Assessment** is read-only
EMPLOYEE ANNUAL ASSESSMENT

Annual Assessments are part of the CCAS end-of-cycle process.

Annual Assessment process overview:

- Employee submits assessment write-up
- Supervisor reviews submission and either:
  - enters assessment narrative and scores (if applicable) for employee then submits it to pay pool
  - returns assessment to employee for modification
- Pay pool panel reviews and assessment is released upon approval by the pay pool manager
- Supervisor records method and date of communication, signs and releases assessment so employee can signature
- Employee receives released notification and signs assessment

To view your Annual Assessment page, go to:

Annual Assessment page overview:

1. Menu > Employee > Annual Assessment
2. Status of the Annual Assessment
3. General Information panel
4. Current Contribution Plan Details panel
5. Option to Copy Assessment Narratives from Midpoint

6. **Job Achievement and/or Innovation** button

7. **Communication and/or Teamwork** button

8. **Mission Support** button

9. Action button to **Cancel** (will remove all text input without saving)

10. Action button to **Save** (will retain all text input)

11. Action button to **Submit to Supervisor 1** (will retain all text input upon sending to the supervisor)

**GENERAL INFORMATION PANEL**

The **General Information** panel has the basic information on the user. For your contribution plan, remember your 1. Career Path, 2. Broadband Level, and 3. Expected OCS and Range as you develop your objectives.
CURRENT CONTRIBUTION PLAN DETAILS PANEL

Depending on your local business rules, your Current Contribution Plan Details panel may have mandatory objectives

- You have the option to Copy Assessment Narratives from Midpoint

- If your local business rules offer the option to convert your Contribution Award (CA) to Time Off Award (TOA), you can request TOA in lieu of CA. See Apply CA toward Time Off below for details.

APPLY CA TOWARD TIME OFF

You will see this option to Apply CA toward Time Off if offered by your pay pool. The CA to TOA will convert your computed Contribution Award (CA) to Time Off Award (TOA) hours by
1. New Total Pay / 2087 Annual Hours = New Hourly Rate
2. Computed CA / New Hourly Rate = TOA Hours (round down to the whole hour)
3. TOA Hours * New Hourly Rate = CA to TOA Hours
4. Computed CA – CA to TOA Hours = Remaining CA not converted to TOA Hours
5. Remaining CA not converted to TOA Hours will be the CA dollar you will receive in January

1. To request Apply CA toward Time-Off, select Yes

2. When Yes is selected, you will see the Time Off Award Acknowledgement statement, READ
3. If you agree, click Acknowledge

4. You can select either 50% or 100% of the CA to TOA

5. Scroll down, click Save then start your annual assessment

**JOB ACHIEVEMENT AND/OR INNOVATION, COMMUNICATION AND/OR TEAMWORK, MISSION SUPPORT PANEL**

1. Click Job Achievement and/or Innovation
2. Click on the Factor Descriptor under any of the factor button, you will see the Expected Contribution Criteria, discriminators, and descriptors for the selected factor. Make sure to see the broadband level best
representing your contribution level as a reference while developing your contribution assessments and review the Expected Contribution Criteria to address your performance assessments.

3. Enter assessment narrative in the textbox for **Job Achievement and/or Innovation**

4. Each factor text box can have up to 4,000 characters.

♀ While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write out objectives in a Word document, copy document text and paste into the objective text box.

If you decide to enter objectives directly into CAS2Net, note the auto-save timer below the Individual Objectives textbox.

5. Click **Save** at any time to save your progress

Repeat steps 3 and 5 for Communication and/or Team Work and Mission Support buttons

6. When you’re ready to submit your assessment narrative, click **Submit to Supervisor 1**
7. Click Yes to Submit to Supervisor 1

8. Action Result! The data you submitted has been saved.

9. Note Annual Assessment status Submitted to Supervisor 1

10. The Annual Assessment is read-only

ANNUAL ASSESSMENT RETURNED BY SUPERVISOR 1

Unless your supervisor returns the assessment, you’re limited to read-only access to Annual Assessment after submission.

- You'll be notified when your assessment is returned by your supervisor via email and in CAS2Net (Menu > Home > Index under User Notifications panel).
Either the email and/or your supervisor provide the reasons/need for modifications so you can update and resubmit it accordingly. Follow steps highlighted in entering employee Annual Assessment as quickly as possible if and when your supervisor returns your assessment.

**EMPLOYEE SIGNING ANNUAL ASSESSMENT**

Employees will receive a CAS2Net generated email when the supervisor signed and released the annual assessment.

1. Go to Menu > Employee > Annual Assessment
2. Note status must be Released
3. Note approved scores
4. Select Sign

5. From Sign Annual Assessment dialogue to confirm you want to sign the annual assessment, click Yes to sign

6. NOTE: Signing the annual appraisal does not imply your consent or agreement with the result of the assessment. Signing is only to acknowledge receipt of the annual appraisal.

7. Action Result! The data you submitted has been saved. This confirms you signed the annual assessment.

8. Note signatures, dates and scores

9. To view or download or save the signed annual assessment, select Menu > Employee > Reports.
10. Select Salary Appraisal Form

11. To view, click Open. Option to Save or Save As
12. Complete Salary Appraisal Form

**ADDITIONAL FEEDBACK**

Supervisors initiate Additional Feedback for employees. No employee self-assessment is associated with this module.
**Additional Feedback** is an optional feature that lets supervisors provide supplemental commentary to address employee contribution and performance throughout the rating cycle. Consistent and frequent communication ensures that employees don’t get blindsided with a poor assessment at annual assessment time. A supervisor may use this section to annotate any recognition/praise the employee may have received, and/or inadequate contribution/unacceptable level of performance by the employee. For employee’s inadequate contribution/unacceptable level of performance, the Additional Feedback should identify areas for improvement and expectations for improvement.

**Additional Feedback** process overview

- When used, supervisor enters feedback narrative
- In order to finalize, supervisor and employee must formally meet and discuss feedback topic/s (face-to-face, tele-conference, video-conference, email, or other)
- Supervisor enters feedback discussion date and method of communication in CAS2Net then releases it to the employee
- CAS2Net notifies employee via email and within CAS2Net (Menu > Home > Index under User Notifications panel)

- Employees have read-only view of the released **Additional Feedback**

To access the **Additional Feedback**, go to:

**Note:** Released feedback is for your record and review only. No employee self-assessment is associated with Additional Feedback

1. **Menu > Employee > Additional Feedback**
2. Select from released feedback/s from table in the **Additional Feedback** panel
3. Supervisor 1 Feedback in Objectives panel

4. Supervisor 1 Assessment text box under Job Achievement and/or Innovation

5. Supervisor 1 Assessment text box under Communication and/or Teamwork

6. Supervisor 1 Assessment text box under Mission Support

7. Supervisor 1 Approval has the date and method of communication of the discussion between the supervisor and you

8. Click Generate PDF to view the Additional Feedback
CLOSEOUT ASSESSMENT

The Closeout Assessment menu option isn’t visible in your navigation menu until your supervisor initiates and creates the Closeout Assessment.

You must complete a Closeout Assessment upon a change in supervisor either within your current pay pool or reassignment/promotion into another pay pool. For closeout policy details and guidance, refer to the Employee Movement Matrix at https://acqdemo.hci.mil/tools/employee_movement_matrix.pdf

You’ll receive notifications via email and CAS2Net (Menu > Home > Index under User Notifications panel) when your supervisor initiates closeout.
After your supervisor initiates and creates the closeout, a **Closeout Assessment** navigation option is added to your employee navigation menu. To view the page, go to:

**ENTER CLOSEOUT ASSESSMENT**

! **Note:** Upon submission, you’ll have read-only access to your closeout assessment unless your supervisor decides to send it back to for your edits.

To enter closeout narrative, go to:

1. **Menu > Employee > Closeout Assessment**
2. In the **Objectives** section for the Closeout Assessment, review your objectives and complete the **Employee Comments** text box before going to Step 3.
3. Follow steps highlighted in entering employee Annual Assessment

4. When you are ready to submit your closeout narrative, click Submit to Supervisor 1

5. Click Yes

CLOSEOUT ASSESSMENT RETURNED BY SUPERVISOR 1

Unless your supervisor returned the Closeout Assessment, you’re limited to read-only access for your Closeout Assessment after submission.

- You’ll be notified of supervisor’s request for modification via email and in CAS2Net (Menu > Home > Index under User Notifications panel).
Either the email and/or your supervisor provide the reasons/need for modifications so you can update and resubmit it accordingly. Follow steps highlighted in Enter Closeout Assessment if your supervisor returns your assessment.

ARCHIVED APPRAISALS

The Archived Appraisals module stores the signed annual appraisals. For example, for the 2020 rating cycle, Archived Appraisals holds signed and uploaded appraisals for years 2016-2018 while appraisals for 2019 are available in Menu > Employee > Reports page. Refer to the Reports section of this guide for download instructions.

To download a .pdf copy of appraisal(s) forms between 2016 and 2018, go to:

1. Menu > Employee > Archived Appraisals

2. Use the Fiscal Year column, in table under eDocuments List panel, to find and select your preferred archive appraisal year.
3. Click the link beside **Download Document** label to download the appraisal

4. Select **Open**, **Save**, **Save as** or **Cancel** the downloaded Archived Appraisal

Example of CCAS Annual Appraisal.pdf format file download with all 11 pages:
You cannot upload documents into the Archived Appraisals page. If you find error/s in your past appraisal records and/or missing appraisals, contact your administrator for further assistance.

REPORTS

The Reports page lets you open and/or save PDF files for the following employee reports.

- Contribution Plan
- Midpoint Assessment
- Annual Assessment
- Additional Feedback (if discussed then released by the supervisor)
- Closeout Assessment (if required, completed and released)
- Salary Appraisal Form (after approved for release by pay pool manager)

To download your employee reports, go to:

1. Menu > Employee > Reports

💡 You may not see all report buttons as displayed in the Reports page image below. This may be due to the report not being initiated or completed.

2. From the Fiscal Year dropdown, select the year for desired report
3. Click [report-title] button to download

! Note: Replace [report-title] with report name you wish to generate.

Select Open, Save, Save as or Cancel the downloaded report

The report will download into your specified directory/folder.
Grievance
GRIEVANCE OVERVIEW

The grievance module is a means of submitting, documenting, and resolving adjustments related to employee annual assessment results. As an employee, you must initiate and submit grievance within the stated grievance window (timeframe) for your organization as defined in your organization’s local business rules. You can initiate a grievance about one or more of the following:

- Categorical scores
- Numerical scores
- Performance Appraisal Quality Level (PAQL) scores
- Supervisor narrative assessment

Grievance process overview:

- Employee submits grievance within grievance window after receiving annual assessment results
- Employee identifies and submits requests for score and/or supervisor narrative changes to supervisor
- Supervisor reviews the grievance and either:
  - Documents recommendation and submits grievance with recommendations to the pay pool manager
  - Returns grievance back to employee for modification
- Pay pool manager releases grievance decision after reviewing employee requests for adjustments and supervisor recommendations

! Note In order to see the Grievance page listed as a menu item, the following must occur, either the pay pool established a grievance window to activate the Grievance Module for all to see or the employee requested his/her pay pool administrator to activate the Grievance Module. See Initiate Grievance of this guide for detailed instructions.

Upon activation, Grievance module is listed in your navigation menu under:
Menu > Employee > Grievance

Grievance page overview:
Acknowledgment of Applicability and Statement of Understanding

I understand that this is a request for a CCAS grievance to the OCS and/or the annual rating of record for 10-01-2015.

I understand that the CCAS grievance process does not apply to any midpoint review, closeout and/or additional feedback I may have received throughout the rating cycle, supervisor recommended ratings, or any recommended ratings submitted by the sub-pay pool panel (if applicable).

I understand that my most recent approved OCS and/or Rating of Record (RoR) prior to the subject appraisal year cycle cannot be reduced or lowered as a result of this CCAS grievance.

I understand that if I receive an adjusted OCS and/or RoR as a result of this CCAS grievance, I will receive a revised OCS and/or RoR, a revised Part I CCAS Salary Appraisal Form reflecting the adjusted OCS, and the new effective OCS for the next rating cycle. In addition, a revised RoR would be annotated on the Part I of the CCAS Salary Appraisal Form. Any increase in monetary adjustments of General Pay Increase (GPI), Contributory Rating Increase (CRI), Carrazone Award or Contribution Award (CA) resulting from an adjusted OCS will be retroactive to the effective date of the payroll, which is the beginning of the first full pay period in January.

I understand that allegations of non-discrimination, such as race, color, religion, sex, national origin, age, physical or mental disability, or reprisal may not be processed through the CCAS grievance process and shall not be in the CCH grievance window for my organization.

Job Achievement and/or Innovation

Communication and/or Teamwork

Mission Support

Scores

No

Yes

Supervisor Assessment

No

Yes

Approved OCS: 99

Approved RoR: 5

I received:

Approved Categorical Score

Approved Numeric Score

Approved Performance Score

Categorical Score

Numeric Score

Performance Score

4H

X

4H

X

4H

X

I believe I should have received a score or scores of:

Basis for Change

The requested score is reflective of a major contribution I made in which I took on NH level responsibilities with the departure of a Senior Leader in my department. I am also requesting a change to the supervisory narrative as I do not believe it adequately summarized the mentioned contribution.

Please see my attachment which displays the level of work I completed prior vs. when I took on the additional responsibilities.

Adjustment to Supervisor Narrative

Summary of Score Change Request

Approved OCS: 99

Approved RoR: 5

Requested OCS: 99

Requested RoR: 5

Withdraw

Cancel

Save

Submit to Supervisor

Attachments
6. Your grievance status.

7. Fiscal year for the initiated grievance.

8. The General Information panel shows your employment information (Career Path, Broadband Level, Expected OCS and Range) to guide you as you develop and write your grievance.

9. The References panel identifies where you can find information related to the grievance process in the Federal Register Notice and the AcqDemo Operating Guide. Both documents are available on the AcqDemo website. The References panel may also include your local business rules and other local guidance/instructions.

10. Before you begin working on your grievance, be sure to read the Acknowledgement of Applicability and Statement of Understanding panel. Submitting the grievance means you, the employee, consent and are in agreement with the terms of the agreement.

11. Annual assessment factor button tabs for each assessment factor – Job Achievement and/or Innovation, Communication and/or Teamwork, Mission Support
a. Any content entered/ adjusted only applies to the selected factor button. An employee can grieve any or all of the 3 factors.

12. The Yes/No toggle buttons identify whether you’re grieving the annual assessment Scores, Supervisor Assessment or both.

13. Identifies Approved OCS and Approved RoR for your annual assessment

14. I received - Displays the approved scores on your annual assessment for reference and is not editable.

15. I believe I should have received a score or scores of - Contains dropdowns to request the categorical score, numeric score, and performance score you believe you deserve.
   a. This field is only available for edit if you set Scores toggle button to Yes

16. Basis for Change textbox – Required entry, use this text box to enter in your reasons for the request for the change in score and adjustment to the supervisor assessment.

17. Adjustment to Supervisor Narrative textbox – Populates automatically with your supervisor’s assessment. Make adjustments to this text if you’re grieving supervisor narrative.
   a. This field is only available for edit if you set Supervisor Assessment toggle button to Yes.

18. Summary of Score Change Request panel – Summary of your approved OCS and Approved RoR scores/rating and the OCS and Approved RoR scores/rating you’re requesting through the grievance claim.
19. Action buttons to withdraw, cancel, save, submit grievance to supervisor, and to attach documents.
   a. **Withdraw** button – deletes the grievance permanently.
   b. **Cancel** button - removes text input if you do not want to save the changes you made.
   c. **Save** button – saves changes you made to grievance.
   d. **Submit to Supervisor** button – submits your grievance to your supervisor if all required information is complete.
   e. **Attachment** button – allows you to upload document(s) to support your grievance submission.

### INITIATE GRIEVANCE

To initiate your grievance, go to:

1. **Menu > Employee > Annual Assessment page**
2. Click **Initiate Grievance**
COMPOSE GRIEVANCE

You must first initiate a grievance to view/access the Grievance page. If you haven’t done so already, follow steps covered in <a>Initiate Grievance</a> of this guide before continuing with the next steps.

You can grieve one or both of the following:

- Assessment score – See steps highlighted in <a>Grieve Assessment Score</a> portion of this guide.
- Supervisor assessment narrative - See steps highlighted in <a>Grieve Supervisor Assessment</a> portion of this guide.

Grieve Assessment Score

To grieve assessment score, go to:

1. Menu > Employee > Grievance
2. Click factor button related to score(s) you want to grieve. You can select from **Job Achievement and/or Innovation**, **Communication and/or Team Work**, and **Mission Support**. For demonstration purposes, we’ll click **Job Achievement and/or Innovation** in the following steps.

3. Set **Scores** toggle button to **Yes** to display additional fields required to grieve your score(s).

4. Select score(s) you believe you should’ve received in **Categorical Score**, **Numeric Score**, and **Performance Score** dropdowns.

   - Use Approved **Categorical Score**, Approved **Numeric Score**, Approved **Performance Score** fields to reference scores you received. These fields are greyed-out, read-only and disabled for edits.
! Note  Textboxes in the Grievance module have character limit of 4,000. You’ll receive an error if you attempt to submit a grievance with a textbox that exceeds the character limit.

5. In the Basis for Change textbox, enter your reason for score/s change.

   While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write in a Word document, copy document text and paste into the text box. If you decide to enter the narrative directly into CAS2Net, note the auto-save timer below the text box.

6. To grieve scores for another factor(s), repeat steps 2-5.

7. To save your progress at any time, click the Save button.
   a. If you want to add supporting documents to supplement your grievance, see Attach Supporting Files of this guide for instructions.
   b. If you want to grieve supervisor assessment for the selected factor, see Grieve Supervisor Assessment of this guide for instructions.

8. When you’re ready to submit your grievance, click Submit to Supervisor.

9. Click Yes.

   ![Submit Grievance Image]

Grieve Supervisor Assessment

To grieve supervisor assessment, go to:

1. Menu > Employee > Grievance
2. Click factor button related to supervisor assessment you want to grieve. You can select from Job Achievement and/or Innovation, Communication and/or Team Work, and Mission Support. For demonstration purposes we'll click Job Achievement and/or Innovation in the following steps.

3. Set Supervisor Assessment toggle button to Yes to display additional fields to grieve supervisor assessment.

4. In the Basis for Change textbox, enter your reason for modifying your supervisor’s assessment narrative.

5. In the Adjustment to Supervisor Narrative textbox, modify supervisor assessment narrative to fit the narrative you believe you should've received. This textbox populates automatically with your supervisor’s assessment. Make adjustments to this text if you’re grieving supervisor narrative.

! Note Textboxes in the Grievance module have character limit of 4,000. You’ll receive an error if you attempt to submit a grievance with a textbox that exceeds the character limit.
While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write in a Word document, copy document text and paste into the text box. If you decide to enter the narrative directly into CAS2Net, note the auto-save timer below the text box.

6. To grieve the supervisor assessment for another factor(s), repeat steps 2-5.

7. To save your progress at any time, click the **Save** button.
   a. If you want to add supporting documents to supplement your grievance, see [Attach Supporting Files](#) of this guide for instructions.
   b. If you want to grieve supervisor assessment score for the selected factor, see [Grieve Assessment Score](#) section of this guide for instructions.

8. When you’re ready to submit your grievance, click **Submit to Supervisor** (otherwise click **Save**).

9. Click **Yes**.
Attach Supporting Files

To add any document(s) that support your grievance, go to:

1. **Menu > Employee > Grievance**
2. **Click Attachments.**
3. **Click Upload Document.**
4. Navigate to and select the desired document then click **Open**.

5. In the **Description** textbox, enter file description.

6. Click **Save**.

7. To view uploaded document, click **Attachments**. You can add additional attachments by repeating step 1-6.
WITHDRAW GRIEVANCE

! Note If you decide to withdraw your grievance, all related records are permanently deleted. This action cannot be undone.

If you initiated a grievance and no longer have a need for it, you can withdraw it.

To withdraw grievance, go to:

1. Menu > Employee > Grievance
2. Click Withdraw.
3. Click Yes.
GRIEVANCE RETURNED BY SUPERVISOR 1

Unless your supervisor returns your grievance for modification, you’re limited to read-only access to your grievance submission.

- If your supervisor returns your grievance for modification, you’ll receive an email and notification in CAS2Net (Menu > Home > User Notifications panel).

Confirm with your supervisor the reason(s) or need for modification so you can update and resubmit the grievance accordingly. Be sure to resubmit as quickly as possible if and when your supervisor returns your grievance.
# SUPERVISOR

## OVERVIEW

## SUPERVISOR DASHBOARD

View User(s) details and open assessment form(s) From Dashboard Charts

## CONTRIBUTION PLAN

Assign Mandatory Objectives Contribution Plan

**Employee Individual Objectives**
- Enter Objective Into A Single Textbox
- Enter Individual Objectives By Factor

Copy Objectives from Previous FY Contribution Plan

Approve Contribution Plan

Return Contribution Plan for Modification

## MIDPOINT ASSESSMENT

Supervisor

Enter Overall Supervisor Assessment

Return Midpoint Assessment for Modification

Approve Midpoint Assessment

## ANNUAL ASSESSMENT

Enter Annual Assessment Narrative and Score

Submit Annual Assessment
Return Annual Assessment for Modification

Sign and Release Annual Assessment to Employee

ADDITIONAL FEEDBACK

Initiate And Enter Feedback

CLOSEOUT ASSESSMENT

Initiate Closeout for a Single Employee

Bulk Initiate Closeout Assessment (Supervisor Leaving Pay Pool)

Enter Closeout Narrative

Approve Employee Closeout Submission

Return Closeout for Employee Modification

Delete Closeout Assessment

GRIEVANCE

Grievance Overview

Recommend Grievance Approval

Recommend Grievance Disapproval

Recommend Grievance Approval with Adjustments

Return Grievance To employee For Modification

Administrator Returns Grievance To supervisor

REPORTS

Download Report
Overview

This section pertains to users assigned the **Supervisor** role within CAS2Net. It provides a functional overview and guidance for every item listed under the **Supervisor** drop-down panel in the CAS2Net navigation menu.

Index will be discussed in this chapter. For information on FAQs, About, Contact, What New, and Refresh Session go to the General User Information chapter of this CAS2Net User Guide.

This chapter will cover the items listed in the **Supervisor** Menu. Items listed in your view will be based on your assigned duties as a supervisor.

SUPERVISOR DASHBOARD

CAS2Net generates dynamic pie charts to visually display employee appraisal progress. There are three pie charts in total, each chart is for one of the following appraisals in the CCAS cycle:

- Contribution Plan
- Midpoint Assessment
- Annual Assessment

To view appraisal status dashboard charts for a given year, go to:

1. **Menu > Home > Index**

2. From the radio buttons under **Supervisor 1 Dashboard**/**Supervisor 2 Dashboard** panel, select preferred cycle year
VIEW USER(S) DETAILS AND OPEN ASSESSMENT FORM(S) FROM DASHBOARD CHARTS

Each chart in your dashboard is responsive meaning you can view user(s) appraisal details table by simply clicking on your desired segment in the pie chart. Additionally, supervisors can access an individual employee appraisal form from dashboard charts.

To view user details and access individual employee forms, go to:

! Note: For demonstration purposes we’ll use 2020 Midpoint Assessment pie chart in the following steps

1. **Menu > Home > Index**
2. From the radio buttons under **Supervisor 1 Dashboard/Supervisor 2 Dashboard** panel, select preferred cycle year
3. Click on preferred segment from the pie chart of your choice to view table user(s) that represent that segment
4. To view an individual employee’s appraisal form, select preferred user from the user details table dialog
Midpoint Assessment page for employee, Ashley Carter, selected in step 4:
Contribution Planning

Contribution Planning allows the supervisor to collaborate with employees to refine contribution, performance, and developmental objectives for the respective cycle year. Either party may initiate it if the Contribution Plan status is In Progress. However, it’s up to the Supervisor to approve or send back the plan for modification. CAS2Net saves previously approved versions of the year’s contribution plan if necessary for review.

To access Contribution Plans page for Supervisor, go to:

Menu > Supervisor > Contribution Plan

Contribution Plans page overview:

The following elements make up the Contribution Plan page:
General information panel

- Fiscal Year dropdown

Employee Contribution Plans – Supervisor 1 panel

- Search box to filter table results

In addition to the overall Search box, there are text search boxes under each column title label to filter results based on values provided for specific column/s

- Table that lists all your employees:

9. Status column
10. Not Started - neither the employee nor the supervisor has started working on the contribution plan; it is input-ready for both employee and supervisor
11. Draft - either the employee and/or the supervisor have started working on the contribution plan; it is input-ready for both employee and supervisor
12. Draft-Returned - supervisor has returned the draft contribution plan back to employee for modification; it is input-ready for the employee
13. Submitted - employee has submitted the contribution plan to the supervisor for review and approval; it is now read-only to the employee but input-ready for the supervisor
14. Approved - supervisor has approved the contribution plan submitted by the employee, which is now completed; Unless the supervisor initiated modification, it is read-only for both employee and supervisor
15. Name
16. Email
17. Effective Date
18. Supervisor 1
19. Supervisor 2

To view, edit, and review contribution plans for an individual employee, go to:

1. Menu > Supervisor > Contribution Plans
2. Select year from Fiscal Year dropdown
3. From the table, select employee to view contribution plan details
Note: You can see the selected employee’s appraisal status next to employee name in the page title.

**ASSIGN MANDATORY OBJECTIVES CONTRIBUTION PLAN**

*Mandatory Objectives* aren’t visible to supervisor unless pay pool administrator has created them. While it is up to the supervisor to assign mandatory objectives to employees, the pay pool Administrator must create them first.
Your administrator sets up the mandatory objectives for your pay pool, based on your organization’s business rules. Supervisors will work with administrators to add mandatory objectives to CAS2Net as well as assign the mandatory objectives to the employees. Changes to mandatory objectives will have to be discussed with administrators and verified in the CAS2Net. CAS2Net also allows the supervisor to pick and choose which mandatory objectives to assign to their employees.

! Note: Remember it is considered best practice add/assign mandatory objectives at the beginning of the CCAS cycle.

To assign mandatory objectives to an employee, go to:

1. Menu > Supervisor > Contribution Plans
2. Select year from Fiscal Year dropdown
3. From the table, select employee to view mandatory objectives
4. From the Contribution Planning panel, click Assign Mandatory Objectives
5. From the checklist in the Assign Mandatory Objectives dialog, select objectives to add to the employee’s contribution plan
6. Click Save
Selected mandatory objectives are now visible in the Mandatory Objectives box in the Contribution Planning panel.

EMPLOYEE INDIVIDUAL OBJECTIVES

It is important to understand that your screen reflects how the contribution plan is configured by your pay pool Administrator IAW local business rules. You may have three separate text boxes to review or to enter the employee objectives for each one of the three factors, or just one text box for overall individual objectives.

If you see Job Achievement and/or Innovation, Communication and/or Team Work, and Mission Support above the individual objectives text box, see Enter individual Objectives by Factor.

Otherwise, see Enter Objective into a Single Text Box.
As a supervisor, you can enter an employee’s individual objectives while plan status is in Draft. At this point, you can save your entry but not approve it or send it back to the employee for modification. Those functionalities are only available once the employee submits the plan.

**Enter Objective into a Single Text Box**

1. **Menu > Supervisor > Contribution Plans**
2. Select year from **Fiscal Year** dropdown
3. From the table, select employee to view details
4. Enter contribution and performance objectives in the **Individual Objectives** text box
5. Click **Save** at any time to save your progress
Upon employee submission of the contribution plan you either have the option to approve plan or return plan back to employee for modifications.

Enter Individual Objectives by Factor

1. Menu > Supervisor > Contribution Plans

2. Select year from Fiscal Year dropdown

3. From the table, select employee to view details

4. Click Job Achievement and/or Innovation

5. Enter contribution and performance objectives in the textbox for Job Achievement and/or Innovation

   Click the Factor Description link to reference description details for the factor tab you selected

Although CAS2Net auto-saves your progress every 5 minutes, we recommend writing your objectives in a separate Word document, copying document text, and pasting it into the Individual Objectives text box to prevent data loss
6. Click Save at any time to save your progress.

**Note:** Only Delete, Save, and Cancel buttons are available until the employee submits the plan. You won’t see the Approve or Return to Employee buttons until the employee submits his/her contribution plan.

Upon employee submission of the contribution plan supervisor either have the option to approve or return plan back to employee for modifications.

**COPY OBJECTIVES FROM PREVIOUS FY CONTRIBUTION PLAN**

If the supervisor drafts the contribution plan, supervisors can copy the previous fiscal year contribution plan to the current contribution plan.

To copy previous plan objectives for an employee:

1. **Menu > Supervisor > Contribution Plans**
2. Select year from Fiscal Year dropdown
3. From the table, select employee to view details
4. From the **Contribution Planning** panel, click **Copy Objectives from Previous Plan**

5. Click **Yes**

6. Copied objectives are visible in the **Individual Objectives** box in the **Contribution Planning** panel

**APPROVE CONTRIBUTION PLAN**
To approve plan:

1. **Menu > Supervisor > Contribution Plans**

2. Select year from **Fiscal Year** dropdown

3. From the table, select to view assessment detail

4. Click **Supervisor 1 Approval**

5. Select how you communicated with the employee from the **Method of Communication** checkbox options

6. Enter communication occurrence date into **Date Communicated** box

7. Select **Supervisor** checkbox next; your name should populate in the text box below

8. Click **Approve**

9. From the **Submit Contribution Plan** dialog, click **Yes**
RETURN CONTRIBUTION PLAN FOR MODIFICATION

To send back plan for employee modification:

1. **Menu > Supervisor > Contribution Plans**
2. Select year from **Fiscal Year** dropdown
3. From the table, select employee to view details

4. In the review of the individual objectives, you may want the employee to provide specific tasks/goals to be completed, measurements of success and performance, expected results and/or impacts, expected completion date, etc.

5. Click **Return to Employee**
6. Enter reason for return in the **Justification** box

7. Click **Yes**

---

**MIDPOINT ASSESSMENT**

Supervisors do not assign a rating with a Midpoint Assessment

The **Midpoint Assessment** takes place mid cycle year (April/May). It helps identify and document employee progress or deficiency as defined by objectives in their respective contribution plan. It gives a chance for supervisors to share with their employee a preliminary assessment on how they are doing on the job and contribution plan; it encourages a discussion between employee and supervisor. This checkpoint is essential to both the employee and the supervisor because it presents the opportunity for the supervisor to present any contribution and/or performance deficiency, or to confirm that the employee’s contribution and performance are on track.

Midpoint assessment process steps:

- Either employee or supervisor initiates midpoint assessment IAW local business rules
- Employee submits a midpoint self-assessment on each factor
• Supervisor reviews and enters midpoint assessment narrative on each factor for employee
• Supervisor and employee collectively review assessment
• Supervisor records date and method of communication to approve or sends assessment back to employee for modification

To access Midpoint Assessments page for Supervisor, go to:

Menu>Supervisor>Midpoint Assessments

The following elements make up the Employee Midpoint Assessments page:

General information panel

• Fiscal Year dropdown
• **Employee Midpoint Assessments - Supervisor 1** panel

In addition to the overall Search box, there are text search boxes under each column title label to filter results based on values provided for specific column/s.

• **Search** box to filter table results

• Table that lists all your employees and their midpoint assessment and the following columns:
  
  • Status column – shows where each employee is in the midpoint assessment process.
    
    ▪ Not Required - midpoint assessment not required (e.g., employee hasn’t been in AcqDemo position long enough for a mid-year assessment)
    
    ▪ Not Started - no input entered, either employee or supervisor initiate midpoint assessment
    
    ▪ **Not Started** - indicates a midpoint cannot be initiated until the contribution plan is approved
    
    ▪ Draft - employee and/or supervisor entered and saved input for Midpoint Assessment
    
    ▪ Submitted to Supervisor 1 - employee submitted his/her midpoint self-assessment for supervisor review
    
    ▪ Returned by Supervisor 1 - supervisor returned self-assessment to employee for modifications
    
    ▪ Approved-Completed - supervisor approved and released midpoint assessment
  
  • **Name** column
  
  • **Email** column
  
  • **Supervisor 1** column
  
  • **Supervisor 2** column
  
  • **Date Communicated** column

• **Employee Midpoint Assessments - Supervisor 2** panel, if applicable, has the same functionality and table listing.

To view, edit, and review midpoint assessments for an individual employee, go to:

1. **Menu > Supervisor > Midpoint Assessments**
2. Select year from Fiscal Year dropdown

3. From the table, select preferred employee to view assessment detail

INITIATE MIDPOINT ASSESSMENT FOR EMPLOYEE

Your local business rules may allow supervisors to initiate Midpoint Assessment for employees that have a status, Not Started.

To access your Midpoint Assessments page, go to:

1. Menu > Supervisor > Midpoint Assessments

2. Select year from Fiscal Year dropdown

3. From the table, select employee with status “Not Started” in the Status column
4. From the Initiate Midpoint dialog, click Yes

5. Upon initiation, you can view and edit the Midpoint Assessment page of that employee for whom you initiated the assessment. The status for that employee also changed from Not Started to Draft-In Progress.

   a. The employee Midpoint Assessment has three panels: General Information, Contribution Planning and three factor buttons Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support

6. General Information panel has the basic information on the employee to include the career path, broadband level and expected OCS and range vital to your assessment of the employee

7. Contribution Planning panel has the contribution effective and approval dates and may have multiple listing if the plan was modified during the year

8. Panel with Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support buttons for the assessment
9. Action buttons: **Cancel** (will not save your assessment), **Save**, **Submit to Supervisor 1** (will save your assessment) and **Skip Midpoint**

To enter a midpoint assessment on an employee, see [Enter Overall Supervisor Assessment](#)

Or you may select Skip Midpoint because the employee or you are transferring to another AcqDemo activity or leaving AcqDemo, using a closeout instead of a midpoint or for other reasons.

---

**ENTER OVERALL SUPERVISOR ASSESSMENT**

1. **Menu > Supervisor > Midpoint Assessments**

2. **Select year from Fiscal Year dropdown**

3. **From the table, select employee with status “Submitted in Progress” in the Status column**
The **Midpoint Assessment** for an employee has three panels and four action buttons

- **General Information** panel
- **Contribution Planning** panel
- Panel with **Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support** buttons and **Supervisor 1 Approval**
- Action button: **Cancel** (will not save your assessment)
- Action button: **Save**
- Action button: **Submit to Supervisor 1** (will save your assessment)
- Action button: **Approve**
General Information panel has information that will help in assessing your employee

Career Path

Broadband Level

Expected OCS and Range

*Contribution Planning panel may have both the mandatory objectives and individual objectives either in one text box or by the three factors*
Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support buttons and Supervisor 1 Approval panel has the three factor text boxes for your assessment narratives and approval documenting your midpoint review with your employee. If you click on the Factor Description, the applicable factor expected contribution criteria, discriminators and descriptors for your employee can be review. A review of the Factor Description will provide or refresh your memory as to the expected contribution standards for each broadband level and the criteria for performance.
NH Level I

- Proactively seeks opportunities to contribute to assigned tasks.
- Seeks and takes advantage of development opportunities. Takes initiative to pursue completion of qualification requirements.
- Effectively accepts feedback on assigned and accomplished work, and incorporates it to create a better end product.
- Resolves routine problems within established guidelines. Seeks assistance as required.
- Takes initiative in determining and implementing appropriate procedures.
- Conducts activities on a collective task; assists supervisor, or other appropriate personnel, as needed.

Score Range 0-20

NH Level II

- Actively contributes as a team member, leader, provides insight and recommends changes or solutions to problems.
- Identifies and pursues development opportunities. Acheives and maintains qualification and certification requirements.
- Proactively guides, coordinates, and consults with others to accomplish projects, assuming ownership of personal processes and products.
- Identifies, analyzes, and resolves complex, difficult problems.
- Adapts existing plans and techniques to accomplish complex projects/programs. Recommends improvements to the design or operation of systems, equipment, or processes.
- Plans and conducts functional technical activities for projects/programs.

Score Range 22-60

NH Level III

- Considered a functional/technical expert by others in the organization; is regularly sought out by others for advice and assistance.
- Pursues or creates certification, qualification, and/or developmental programs and opportunities for self and others.
- Guides, motivates, and oversees the activities of individuals and teams with focus on project program issues. Assumes ownership of processes and products, as appropriate.
- Develops, integrates, and implements solutions to diverse, highly complex problems across multiple areas and disciplines.
- Develops plans and techniques to fit new situations to improve overall program and policies. Establishes precedent in application of problem-solving techniques to enhance existing processes.
- Defines, directs, or leads highly challenging projects/programs.

Score Range 61-83

NH Level IV

- Recognized as a technical/functional authority within and outside of the organization.
- Fosters the development of others by providing guidance or sharing expertise. Directs assignments to encourage employee development and cross-functional growth to meet organizational needs. Pursues professional self-development.
- Leads, defines, manages, and integrates efforts of several groups or teams. Assumes and assigns ownership of processes and products, as appropriate.
- Assesses and provides strategic direction for resolution of mission-critical problems, policies, and procedures.
- Works with senior management to establish new fundamental concepts and criteria and stimulate the development of new policies, methodologies, and techniques.
- Converts strategic goals to programs or policies.
- Defines, establishes, and directs organizational focus on challenging and highly complex projects/programs.

Score Range 79-100
4. Click **Job Achievement and/or Innovation**

5. Enter your assessment in the textbox for **Job Achievement and/or Innovation**

6. Click **Save** at any time to save your progress

Upon employee assessment submission, you can either cancel, save, **approve** or **return to employee for modifications**

**RETURN MIDPOINT ASSESSMENT FOR MODIFICATION**

Only employees with the status **Submitted-in-Progress** may have their midpoint assessment returned for modification. To return, go to:
Menu > Supervisor > Midpoint Assessments

Select year from Fiscal Year dropdown

From the table, select employee with status “Submitted to Supervisor” in the Status column

1. Click Return to Employee
Although there is narrative text in the Overall Supervisor Assessment, your assessment will not be seen by the employee until you approve and release it.

2. Enter reason for return in the Justification box

3. Click Yes

**APPROVE MIDPOINT ASSESSMENT**

Only employees with the status “Submitted to Supervisor 1” can be selected for approval. To approve employee midpoint assessment, go to:
1. **Menu > Supervisor > Midpoint Assessments**

2. Select year from **Fiscal Year** dropdown

3. From the table, select employee with status “Submitted to Supervisor 1” in the **Status** column

![Image of Employee Midpoint Assessments](image)

**Note:** Follow steps in [Enter Overall Supervisor Assessment](#) to enter the assessment narrative for the selected employee. You must enter narrative for each factor before approving the midpoint assessment.

4. Click **Supervisor 1 Approval**

5. Select how you communicated with the employee from the **Method of Communication** checkbox options

6. Enter communication occurrence date into **Date Communicated** box

7. Select **Supervisor** checkbox next; your name should populate in the text box below

8. Click **Approve**
9. From the Submit Midpoint Assessment dialog, click Yes

ANNUAL ASSESSMENT

Annual assessments are mandatory in CCAS and occur after the end of cycle period on 30 September. Your local business rules will dictate the timeline for the completion and submission of the employee assessment and the supervisor assessment.

Annual Assessment process overview:

20. Employee submits assessment
21. Supervisor reviews submission and either:
   a. enters assessment narrative and scores (as applicable) for employee and submit it to the pay pool
   b. returns assessment to employee for modification
22. Pay pool panel and pay pool manager reviews and approves assessments with scores and payout results
23. Administrator, with the approval of the pay pool manager, releases the Salary Appraisal Forms to the supervisors
24. Supervisor discusses the results with the employee, records method and date of communication, signs and releases the Salary Appraisal Form so employee can sign
25. Employee receives released notification and email, signs the Salary Appraisal Form
ENTER ANNUAL ASSESSMENT NARRATIVE AND SCORE

You can initiate **Annual Assessment** only for employees with an approved *contribution plan* (status *Draft* means annual assessment started but not submitted by employee and *Not Started* mean annual assessment has not been started by employee), or assess employees with a status *Submitted to Supervisor 1* for the respective cycle year.

To access an employee’s **Annual Assessment**, go to:

1. **Menu > Supervisor > Annual Assessments**
2. Select year from **Fiscal Year** dropdown
3. To initiate the annual assessment, go to **Initiate Midpoint Assessment for Employee**
4. To view or access an employee assessment, select employee from the table with the status *Submitted to Supervisor 1*
General Information panel has information that will help in assessing your employee

1. Career Path
2. Broadband Level
3. Expected OCS and Range
Current Contribution Plan Details may have both the mandatory objectives and individual objectives either in one text box or by the three factors. If your local business rules offer employees the option to convert their Computed Contribution Award to Time-Off Award, your employee’s annual assessment will have

⚠️ Apply CA toward Time-Off

Apply CA toward Time-Off – No means the employee did not request

CA to TOA Apply CA toward Time-Off – Yes means the employee did request CA to TOA and either 50% or 100% of the CA to TOA
For more information on Apply CA toward Time-Off, go to [Apply CA toward Time-Off](#)

**Job Achievement and/or Innovation, Communication and Teamwork, and Mission Support** panel has the three factor text box with the employee assessment and for your assessment and scores. *If you click on the Factor Description, the applicable factor expected contribution criteria, discriminators and descriptors for your employee can be review. A review of the Factor Description will provide or refresh your memory as to the expected contribution standards for each broadband level, criteria for performance and score range for each broadband level.*

[Factor Description]

<table>
<thead>
<tr>
<th>Expected Contribution Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produces desired results, as in the needed timeframe, with the appropriate level of supervision through the use of appropriate knowledge, skills, abilities and understanding of the technical requirements of the job. Achieves, demonstrates and maintains the appropriate qualifications necessary to assume and execute key acquisition and/or support requirements. Demonstrates skilled critical thinking in identifying, analyzing and solving complex issues, as appropriate. Takes and displays personal accountability in leading, overseeing, guiding, and managing programs and projects within assigned areas of responsibility. Works timely, efficient and of acceptable quality. Completed work meets project program objectives. Leadership and/or supervision, effectively promotes commitment to organization goals. Flexibility, adaptability, and self-motivation are exercised appropriately. For Supervisors (as appropriate): recruits, develops, motivates, and retains quality team members in accordance with EEO/AA and merit system principles. Takes timely appropriate personnel actions, communicates mission and organizational goals. By example, creates a positive, safe, and challenging work environment; distributes work and employees to team members.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discriminators</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Leadership Role</td>
</tr>
<tr>
<td>- Mentoring/Employee Development</td>
</tr>
<tr>
<td>- Accountability</td>
</tr>
<tr>
<td>- Complexity/Difficulty</td>
</tr>
<tr>
<td>- Creativity</td>
</tr>
<tr>
<td>- Scope/Impact</td>
</tr>
</tbody>
</table>
5. **Click Job Achievement and/or Innovation**

### Factor Description

**Employee Assessment**

- Considered a functional/technical expert by others in the organization; is regularly sought out by others for advice and assistance.
- Pursues or creates certification, qualification, and/or developmental programs and opportunities for self and others.
- Guides, motivates, and oversees the activities of individuals and teams with focus on project/program issues. Assumes ownership of processes and products as appropriate.
- Develops, integrates, and implements solutions to diverse, highly complex problems across multiple areas and disciplines.
- Develops plans and techniques to fit new situations to improve overall program and policies. Establishes precedents in application of problem-solving techniques to enhance existing processes.
- Defines, directs, or leads highly challenging projects/programs.
6. Enter your assessment in the textbox for **Job Achievement and/or Innovation**, you have up to 4,000 characters to assess each factor.

7. **Categorical Score** click ▼ drop-down, **Numeric Score** click ▼ drop-down, **Performance Score** click ▼ drop-down to select scores.

8. Click **Save** at any time to save your progress.

9. The scores will auto-populate when you enter the categorical, numerical and performance scores for all three factors.

---

**SUBMIT ANNUAL ASSESSMENT TO PAY POOL**

When you have completed the supervisor assessment with the scores, you can either:

- Submit to Pay Pool, or
• Return employee assessment for modification - refer to steps in Return Annual Assessment for Modification

10. When you are ready, click Submit to Pay Pool (or if necessary, you may Return to Employee for clarification and/or additional contribution assessments.

11. From the Submit Annual Assessment dialog, click Yes

RETURN ANNUAL ASSESSMENT FOR MODIFICATION

1. Menu > Supervisor > Annual Assessments

2. Select year from Fiscal Year dropdown

3. From the table, select employee that you’d like to return assessment to OR in your supervisor assessment

4. Click Return to Employee (your recommended categorical, numerical and performance scores and your assessment narratives will not be viewable by the employee when your click Return to Employee. The employee will only see their self-assessment.
5. Enter reason for return in the **Justification** box

6. Click **Yes**

---

**SIGN AND RELEASE ANNUAL ASSESSMENT TO EMPLOYEE**

Once the pay pool manager approved the release of the annual assessments results by your pay pool administrator, reviews employee assessment that you submitted to the pay pool, you’ll receive notifications via email and CCA2Net (Menu > Home > Index under User **Notifications** panel)

! **Menu > Supervisor > Annual Assessments**

! Select year from **Fiscal Year** dropdown
From the table, select employee that you like to release and sign the approved annual assessment

4. In the **Annual Assessment for Employee**, note status **Released**

5. **Method of Communication**, check the mean of communicating the annual assessment results to employee

6. **Date of Communication**, select the date of communication

7. Check the box **Communicated by** or enter the name of the individual who communicated the results to the employee
8. Select **Sign and Release to Employee**

9. From the **Sign and Release Annual Assessment**, select **Yes**
ADDITIONAL FEEDBACK

Additional Feedback is an optional feature that lets supervisors provide supplemental commentary to address employee contribution and/performance throughout the rating cycle. Frequent communication between employee and supervisor ensures that employees from getting blindsided with an inadequate contribution and/or unacceptable level of performance at annual appraisal time. Supervisor may use this section to annotate areas of concern and provide guidance for improvement and/or any recognition/praise the employee may have received during the cycle.

The Additional Feedback page is only visible to the Supervisor 1. The feedback itself must be initiated by the supervisor and is only released after meeting with the employee to discuss the contributions and/or performance covered. The supervisor must complete the feedback discussion by entering the date and communication method before release to employee. You can create multiple instances of Additional Feedback using the Add Feedback feature.

To access Additional Feedback:

- Menu > Supervisor > Additional Feedback
- Select Fiscal Year
• Click **Add Feedback** blue button

• Click ▼ for drop down list of employees and select employee

• Select **Yes**

**INITIATE AND ENTER FEEDBACK**

CAS2Net creates a new page for you to enter feedback narrative for the employee of your choice.

The following elements make up the **Additional Feedback** page:
! Additional Feedback status - *Draft*

! **General Information** panel

! **Contribution Planning Details** panel

! **Job Achievement and/or Innovation, Communication and/or Teamwork, and Missions Support** and 
**Supervisor 1 Approval** panel

1. Menu > Supervisor > Additional Feedback
2. From the Additional Feedback panel, click Add Feedback
3. From Employee dropdown in Add Additional Feedback dialog, select preferred employee to create feedback
4. Click Save
5. **General Information** and **Contribution Planning** panels
6. Enter feedback narrative in one or more of the following textboxes

   a. **Supervisor 1 Feedback** textbox

   b. **Supervisor 1 Assessment for one or more factor button tab/s**
7. Select how you communicated with the employee from the **Method of Communication** checkbox options.

8. Enter communication occurrence date into **Date Communicated** box.

9. Select **Supervisor** checkbox next to your own name. It should populate in the text box below.

10. Click **Save** at any time to save your progress.

11. Click employee name.
12. Click Release to Employee after selecting Method of Communication, entering Date Communicated and checking Supervisor

13. From the Submit Additional Feedback, select Yes
14. From the **Submit Additional Feedback** dialog, click **Yes**

15. Status is **Released**
CLOSEOUT ASSESSMENT

Employee can't view and edit Closeout Assessment unless supervisor initiates it.

Closeout Assessment completion is required for cases where employee is changing positions and/or supervisor, or a supervisor is leaving the organization before the end of the rating cycle. Supervisors leaving the organization complete appraisals for current employees for the consideration by the new supervisor determine their annual assessments.

Sometimes, an annual assessment may be more appropriate than a closeout especially when the change in position/supervisor is nearer to the end of the rating cycle 30 September. While both a closeout and an annual will provide an assessment on the employees for the incoming supervisor, the benefit of the annual assessment is that it includes recommended scores while a closeout assessment does not.

For policy details about closeout appraisals, refer to the Employee Movement Matrix and your local business rules.

Closeout Assessment process overview:

- The supervisor initiates Closeout Assessment. Initiation options include:
  - Initiate for a single employee
  - Initiate for all employees in case supervisor is leaving the pay pool
- Employee menu populates with the Closeout Assessment option
• Employee enters self-assessment by factor and submits closeout
  
  o You’ll receive notifications via email and CAS2Net (Menu > Home > Index under User Notifications panel) upon employee closeout submission.

• Supervisor reviews employee submission and either:
  
  o Returns closeout for employee modification
  
  o Enters supervisor closeout narrative and approves employee submission

! Note: Closeout Assessments are different from Annual Assessments. Make sure you select the correct option!

INITIATE CLOSEOUT FOR A SINGLE EMPLOYEE

1. Menu > Supervisor > Closeout Assessments

2. From the Fiscal Year Dropdown, select relevant year

3. Select the name of employee for whom you’d like to initiate closeout.

! Note: If closeout isn’t initiated for an employee, his/her Status is set as Not Started.
4. From **User** dropdown, select preferred employee

5. From the **Reason** dropdown, select basis for initiation

6. Enter **End Date** – **Last Day** of the current job for the employee or supervisor leaving

7. Click **Add**

Employee status changes from **Not Started** to **Draft** upon initiation

Follow steps highlighted in [Enter Closeout Narrative](#) of this user guide to write appraisal narrative for employee.

**BULK INITIATE CLOSEOUT ASSESSMENT (SUPERVISOR LEAVING PAY POOL)**

1. **Menu > Supervisor > Closeout Assessments**

2. From the **Fiscal Year** dropdown, select relevant year

3. Click **Initiate Closeout for All Employees I Supervise**
4. From the **Reason** for dropdown, select *Supervisor is transferring*

5. Enter **End Date** – Last day of your current job as the employee’s supervisor

6. Click **Add**

All Employees’ status changes from *Not Started* to *Draft* upon initiation

Follow steps highlighted in **Enter Closeout Narrative** of this user guide to write appraisal narrative for employees.
ENTER CLOSEOUT NARRATIVE

1. Go to Menu > Supervisor > Closeout Assessments
2. From the Fiscal Year Dropdown, select relevant year
3. Select the preferred employee to enter closeout narrative from table.
4. Click Job Achievement and/or Innovation
5. Enter contribution and performance assessments in the textbox for Job Achievement and/or Innovation

| Repeat steps 4 and 5 for Communication and/or Team Work and Mission Support factor buttons |

6. Click Save at any time to save your progress

💡 Click the Factor Description link to reference description details for the factor tab you selected

CAS2Net automatically saves your text input every 5 minutes. However, to prevent data loss, write out objectives in a separate Word document, copy document text, and paste into corresponding text box

APPROVE EMPLOYEE CLOSEOUT SUBMISSION
To approve employee Closeout Assessment, go to:

1. **Menu > Supervisor > Closeout Assessments**
2. From the **Fiscal Year** Dropdown, select relevant year
3. Follow steps highlighted in [Enter Closeout Narrative](#) section of this guide.
   - **Note:** After employee submits closeout, his/her **Status** is set as **Submitted**.

4. Click **Supervisor 1 Approval**
5. Select how you communicated with the employee from the **Method of Communication** checkbox options
6. Enter communication occurrence date into **Date Communicated** box
7. Select **Supervisor** checkbox next to your our name, It should populate in the text box below
8. Click **Approve**
Click Yes

Employee’s status changes from *Submitted* to *Released* after supervisor approval:

**RETURN CLOSEOUT FOR EMPLOYEE MODIFICATION**

1. **Menu > Supervisor > Closeout Assessments**

2. Select year from **Fiscal Year** dropdown

   **Note:** After employee submits closeout, his/her *Status* is set as *Submitted*.

3. From the table, select preferred employee to return assessment
4. Click **Return to Employee**

5. Enter basis for return in the **Justification** text box

6. Click **Yes**
Employee’s status changes from Submitted to Returned by Supervisor 1

DELETE CLOSEOUT ASSESSMENT

If you initiated closeout assessment for an employee and no longer have a need for it, you can delete the initiated closeout. For example, you’ll need to delete closeout if you accidentally created closeout for the wrong employee or if an annual assessment was determined to be a better option.

To delete previously initiated closeout assessment for an employee:

1. **Menu > Supervisor > Closeout Assessments**
2. Select year from Fiscal Year dropdown
3. From the table, select preferred employee to delete closeout
4. Click Delete
5. Click Yes

1. **Note:** You cannot retrieve any entered employee data after the initiated closeout after deletion

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**GRIEVANCE**

**GRIEVANCE OVERVIEW**

The grievance module is a means of submitting, documenting, and resolving adjustments related to employee annual assessment results. As an employee, you must initiate your grievance within 15 days of receiving the Salary Appraisal Form or within the stated grievance window for your organization or in accordance with your local business rules. You can initiate a grievance about one or more of the following:

- Categorical scores
- Numerical scores
- Performance Appraisal Quality Level (PAQL) scores
- Supervisor narrative assessment

Grievance process overview:

- Administrator receives employee’s grievance, reviews it, and forwards it to supervisor.
  - You’ll be notified of the grievance and status via email and in CAS2Net under **Menu > Home > Index**.
Supervisor reviews the employee’s grievance and recommends one of the following outcomes along with narrative and supplemental files/documents to support recommended action.

- Recommend Approval – if you agree with all aspects of employee’s grievance.
- Recommend Approval with Adjustments – if you agree with some, but not all aspects of employee’s grievance.
- Recommend Disapproval – if you disagree with all aspects of employee’s grievance request.

Supervisor submits recommendation within 10 days, or IAW with local business rules, of receiving the employee grievance.

Administrator receives the supervisor recommendation, reviews recommendation and basis for recommendations, either submits it to pay pool manager or returns it to supervisor for modifications or if clarification is required.

- Supervisor’s recommendation, supporting narrative, and supplementary documents as well as the employee’s grievance are all submitted to pay pool manager.

Pay pool manager reviews both employee grievance and supervisor recommendation and routes the decision to the administrator. Upon the manager’s signature and release of the grievance, the grievance is marked as “Completed” subject to the administrative actions by the administrator.

Administrator releases pay pool manager's decision results to supervisor and administrator.

To view employee grievance, go to:
Menu > Supervisor > Grievances

Grievances page overview:

1. Fiscal Year dropdown –
2. Employee Grievances – Supervisor 1 panel – contains table of employee(s) who have submitted a grievance.
   a. Status column in the table identifies where an employee is in the grievance process.

To view an individual employee’s grievance page, go to:

1. Menu > Supervisor > Grievances.
2. Select related cycle year from Fiscal Year dropdown.
3. From the table, select preferred employee to view grievance.
Individual employee grievance page overview:
1. The current status of employee’s grievance process.

2. Fiscal year read-only dropdown with grievance cycle year.

3. The **General Information** panel contains selected user’s employment information (**Career Path, Broadband Level, Expected OCS and Range**) for the selected employee. You can reference this information as you prepare your recommendation.

4. The **References** panel identifies where you can find information related to the grievance process in the Federal Register Notice and the AcqDemo Operating Guide. Both documents are available on the AcqDemo website. The **References** panel may also include your local business rules and other local guidance/instructions.

5. Ensure that you read the **Acknowledgement of Applicability and Statement of Understanding** panel. By submitting a grievance, the employee has consented to the terms of agreement in this panel.

   ![Note](https://example.com/note.png)

   **Note** The same **Reference** and **Acknowledgement of Applicability and Statement of Understanding** panels are also listed in the employee’s grievance page and agreed upon when he/she submits the grievance.
6. Three grievance recommendation radio button options for supervisor to choose from. Choices include:
   - Recommend Approval – if you agree with all aspects of employee’s grievance.
   - Recommend Approval with Adjustments – if you agree with some, but not all aspects of employee’s grievance.
   - Recommend Disapproval – if you disagree with all aspects of employee’s grievance request.

7. Annual assessment factor button tabs for each assessment factor – Job Achievement and/or Innovation, Communication and/or Teamwork, Mission Support.
   - Any content entered/adjusted only applies to the selected factor button. An employee can grieve any or all of the three factors; therefore, ensure you open and review each factor.

8. Yes/No toggle buttons to identify whether employee is grieving annual assessment Scores, Supervisor Assessment or both.

9. Approved Scores - Displays the approved scores the employee received on the annual assessment.

10. Employee Requested Adjustment – Displays employee adjustment request(s) for categorical score, numeric score, and/or performance score.
a. This field is only visible if the Scores toggle button is set to Yes.

11. **Supervisor Recommended Adjustment** – Contains dropdowns to recommend the categorical score, numeric score, and performance score.

   - The field is only available for edit if the **Recommend Approval with Adjustment** (see step 6) is selected and the Scores toggle button is set to Yes.

12. **Employee Basis** – Employee narrative to substantiate grievance.

13. **Supervisor Basis for Recommendation** – Supervisor narrative to substantiate recommendation.

14. **Adjustment to Supervisor Narrative** textbox – is blank until Supervisor clicks the **Copy Employee Adjustment** button. This is the employee’s requested adjustment to your narrative.
- This field is only available for edit if the **Supervisor Assessment** toggle button is set to **Yes** (see step 8).

15. **Summary of Score Change Request** panel – Summary of the recommended OCS and recommended RoR.

16. Action buttons to withdraw, cancel, save, and submit grievance.

- **Cancel** button - removes text input if you do not want to save the changes you made.
- **Save** button – saves changes you made to grievance.
- **Return to Administrator** button – returns grievance to administrator who can return to employee for modification.
- **Submit to Pay Pool** button – submits your grievance to the administrator to review for completeness before routing to the Pay Pool Manager.
- **Attachments** button – allows you to view attachments submitted by the employee and attach document(s) to support your recommendation.

**RECOMMEND GRIEVANCE APPROVAL**

1. **Menu > Supervisor > Grievances.**
2. Select year from **Fiscal Year** dropdown.
3. From the table, select preferred employee to view grievance.

![Image](image.png)

4. To determine which factor(s) employee is grieving, click each **Job Achievement and/or Innovation**, **Communication and/or Teamwork** and **Mission Support** factor button and review.

- If employee is grieving score(s), **Requested Categorical Score**, **Requested Numeric Score**, and **Requested Performance Score** the fields are displayed below the **Approved Scores**.

  ![Scores Table](scores.png)

- If employee is grieving the **supervisor narrative**, **Requested Change to Supervisor Annual Assessment Narrative**, the textbox field is visible in read-only format for your reference.
5. Check **Recommend Approval** radio button.

**Note**  Each textbox that requires supervisor’s text entry has a 4,000 character limit.

6. In the **Supervisor Basis for Recommendation** textbox, enter your reason(s) for your recommendation.

*While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write in a Word document, copy document text and paste into the text box. If you decide to enter the narrative directly into CAS2Net, note the auto-save timer below the text box.*

7. To add supplemental file(s) that support your recommendation, click **Attachments**.
8. Click **Upload Document**.
9. Navigate to and select the file you want to attach.

10. Click Open.

11. In the Description textbox, enter text description of the attached file.

12. If you want to display an alternative name for the uploaded file, enter new file display name in the **Downloaded File Name** textbox.

13. In the **Upload Documents** dialog, click **Save**.
   
   a. To upload another file, repeat steps 8-13
14. The following are records of conversations

15. To save your progress at any time, click **Save**.

! **Note**  After submitting your recommendation, you’re limited to read-only access.

16. When you’re ready to submit the grievance, click **Submit to Pay Pool**

17. Click **Yes**
RECOMMEND GRIEVANCE DISAPPROVAL

To recommend disapproval of employee grievance go to:

1. **Menu > Supervisor > Grievances.**

2. Select year from **Fiscal Year** dropdown.

3. From the table, select preferred employee to view grievance.

4. To determine which factor/s employee is grieving, click each **Job Achievement and/or Innovation, Communication and/or Teamwork** and **Mission Support** factor button and review.
If employee is grieving score(s), the Requested Categorical Score, Requested Numeric Score, and Requested Performance Score fields are displayed below the Approved Scores.

If employee is grieving supervisor narrative, the Requested Change to Supervisor Annual Assessment Narrative textbox field is visible in read-only format.

If employee is grieving scores and/or supervisor assessment narrative, the Employee Basis for change request is read-only. However, the Supervisor Basis for Recommendation textbox is opened and you are required to enter the basis for recommending disapproval.

5. Select the Recommend Disapproval radio button.
6. In the **Supervisor Basis for Recommendation** textbox, enter your reason(s) for recommending disapproval.

   - **Note** Each textbox that requires supervisor’s entry has a 4,000 character limit.

   - **Note** While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write in a Word document, copy document text and paste into the text box. If you decide to enter the narrative directly into CAS2Net, note the auto-save timer below the text box.

7. To add supplemental file(s) to support your recommendation to disapprove, click **Attachments**.
8. Click **Upload Document**.

9. Navigate to and select file you want to attach.

10. Click **Open**.
11. In the Description textbox, enter text description of attached file.

12. If you want to display an alternative name for the uploaded file, enter new file display name in the Downloaded File Name textbox.

13. In the Upload Documents, click Save.

   a. To upload another file, repeat steps 8-13.

14. The following are records of conversations.
15. To save your progress at any time, click Save.

! Note After submitting your recommendation, you’re limited to read-only access.

16. When you’re ready to submit the grievance, click Submit to Pay Pool.

17. Click Yes.
RECOMMEND GRIEVANCE APPROVAL WITH ADJUSTMENTS

1. Menu > Supervisor > Grievances.

2. Select year from Fiscal Year dropdown.

3. From the table, select preferred employee to view grievance.

4. To determine which factor(s) employee is grieving, click each Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support factor button and review.
If employee is grieving grievance score(s), the **Requested Categorical Score**, **Requested Numeric Score**, and **Requested Performance Score** fields are listed below currently approved scores.

If employee is grieving supervisor narrative, the **Requested Change to Supervisor Annual Assessment Narrative** textbox field is visible in read-only format for your reference.

If employee is grieving scores and/or supervisor assessment narrative, employee’s narrative of basis for change request is visible under the **Employee Basis** textbox as read-only. Additionally, the **Supervisor Basis for Recommendation** textbox is visible and enabled for you to enter the reason(s) behind your recommendation.

5. Select **Recommend Approval with Adjustment** radio button.
6. If you want to adjust or accept the employee’s requested assessment scores, select recommended score(s) from the **Categorical Score**, **Numeric Score**, and **Performance Score** dropdowns.

   ![Reference Approved Scores and Employee Requested Scores read-only dropdowns as you make score adjustments to dropdowns for Supervisor Recommended Adjustment.](image)

   ![Note](image) Each textbox that requires supervisor’s entry has a 4,000 character limit.

7. If you want to adjust employee’s requested change to the supervisor narrative, enter modified narrative in **Adjustment to Narrative** textbox.

   ![Note](image) **Requested Change to Supervisor Annual Appraisal Narrative** is read-only.

   a. **Copy Employee Adjustment.**
   i) If you want modify the employee’s requested change to the narrative, click **Copy Employee Adjustment** to copy to the **Adjustment to Supervisor Narrative** so you can modify by replacing or adding your text.
   ii) If you agree with the employee’s requested change to the narrative, click **Copy Employee Adjustment** to copy to the **Adjustment to Supervisor Narrative** textbox.
   iii) Narrative is required in order to submit the grievance to the administrator. You’ll receive an error otherwise.
While CAS2Net will auto-save after 5 minutes of inactivity, a best practice is to write in a Word document, copy document text and paste into the text box. If you decide to enter the narrative directly into CAS2Net, note the auto-save timer below the text box.

8. In the **Supervisor Basis for Recommendation** textbox, enter your reason(s) for recommending to approve with adjustments.

9. To add supplemental file(s) to support your recommendation, click **Attachments**.
10. Click **Upload Document**.

11. Navigate to and select the file you want to attach.

12. Click **Open**.
13. In the Description textbox, enter text describing attached file.

14. If you want to display an alternative name for the uploaded file, enter new file display name in the Downloaded File Name textbox.

15. In the Upload Documents dialog, click Save.
   a. To upload another file, repeat steps 10-15.

16. The following are records of conversations
17. To save your progress, click **Save**.

! **Note** After submitting your recommendation, you’re limited to read-only access.

18. When you’re ready to submit your grievance, click **Submit to Pay Pool**.

19. Click **Yes**.

**RETURN GRIEVANCE TO EMPLOYEE FOR MODIFICATION**

You can return employee grievance back to the administrator who then returns it to the employee if you need additional information or modifications before submitting to the pay pool.
1. Menu > Supervisor > Grievances.

2. Select year from Fiscal Year dropdown.

3. From the table, select preferred employee to view grievance.

4. Click Return to Administrator

5. Click Yes.

! Note  After Return to Administrator, you're limited to read-only access.
ADMINISTRATOR RETURNS GRIEVANCE TO SUPERVISOR

After you returned the grievance or submitted your recommendation, you’re limited to read-only access unless administrator returns it back to you. Reason(s) for return must be communicated between supervisor and administrator in detail outside of CAS2Net so the supervisor can make necessary changes and resubmit.

- If your administrator returns grievance for your continued review or for modification to your recommendation, you’ll be notified via email and in CAS2Net under Menu > Home > Index.

REPORTS

The Reports page under Supervisor dropdown lets you open and/or save PDF files for the following reports. You can filter report results for one, more, or all employee/s.

To access Reports page for Supervisor, go to:

Menu > Supervisor > Reports
You may not see all report buttons as displayed in the Reports page image below. This may be due to the report not being initiated or completed.

The following elements make up the Reports page:

Fiscal Year Based Reports panel
• **Fiscal Year** dropdown
• Buttons for the following reports:
  o Contribution Plan
  o Midpoint Assessment
  o Annual Assessment
  o Closeout Assessment, if any
  o Released Additional Feedback, if any
  o Salary Appraisal Form

**DOWNLOAD REPORT**

1. Go to, **Menu > Supervisor > Reports**
2. From the **Fiscal Year** dropdown, select the year for desired report
3. Click [**report-title**] button

  ! **Note:** Replace [**report-title**] with report name you wish to generate.

4. Filter rows to meet your criteria if needed. The following are available report filter options
a. From the **Show Entries** dropdown Select number to define number of rows to display Use the Search box – lookup search term in all columns

b. Text boxes under column headers – lookup search term in the column that it’s defined under

5. Select corresponding checkboxes in **Select column** for employee/s you prefer; To check all values listed in the table, select checkbox directly below **Select column header**

6. Click **Continue**

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<th>Select Filter Criteria</th>
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<td><strong>Select Employees for Report Generation</strong></td>
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Showing 1 to 2 of 2 entries
ACDP

OVERVIEW

ACDP EMPLOYEE

ACDP Employee - Contribution Plan

ACDP Employee – ACDP Assessment

Enter ACDP Self-Assessment Narrative and Submit To Supervisor

Sign Approved ACDP Assessment

ACDP Employee Download Approved ACDP assessment

ACDP Employee – Annual Assessment

ACDP SUPERVISOR

ACDP Supervisor – Contribution Plan

ACDP Supervisor - ACDP Assessment

Return ACDP Assessment To Employee

Enter Supervisor Narrative And Submit Employee ACDP Assessment to Approving Official

Return Approved ACDP Assessment to Approving Official

Release ACDP Assessment For Employee Signature

ACDP Supervisor – Annual Assessment

ACDP APPROVER/ PAY POOL MANAGER

ACDP Approve ACDP Assessment

ACDP Return ACDP Assessment To Supervisor for Modification
OVERVIEW

ACDP (Accelerated Compensation for Developmental Positions) allow up to two basic pay increases ranging from 0%-10% per CCAS appraisal cycle for developmental positions. The level of final approval for the ACDP Assessment is determined by each AcqDemo Participating Organization and described in its business rules. The Approving Official reviews and approves the supervisor narrative and percent of ACDP basic pay increase.

ACDP process:
1. Employee completes ACDP assessment and submits to supervisor
2. Supervisor enters narrative and percent of basic pay increase, and submits to the approving official
3. Approving official approves or returns to supervisor
4. If approved, directs back to supervisor for supervisor to record method and date of communication then signs and releases to employee
5. Employee signs assessment as needed and resubmits for approval

ACDP EMPLOYEE

This section pertains to users assigned the ACDP Employee role under in CAS2Net. It provides a functional overview and guidance of CAS2Net processes for ACDP employees.

ACDP employees can receive up to two basic pay increases ranging from 0%-10% per CCAS appraisal cycle. The approving official reviews and approves supervisor narrative and the percent of ACDP basic pay increase.

! Note: Unlike the CCAS cycle, there are no midpoint assessments in the ACDP cycle. Since ACDP assessments are administered twice a year, one of the two ACDP assessments and CCAS Midpoint Assessments occur around the same time.

ACDP Employees participate in the following appraisal processes:

! Contribution Plan

! In lieu of the Midpoint Assessment, completed one of the two ACDP Assessments (completed every six months)

! Annual assessment

ACDP Employee modules are listed under Menu > Employees and include:
ACDP EMPLOYEE - CONTRIBUTION PLAN

Contribution Plan steps for ACDP Employees are identical for all AcqDemo employees. Follow instructions covered in CCAS Employee Contribution Plan subsection of this user manual.

ACDP EMPLOYEE – ACDP ASSESSMENT

Enter ACDP Self-Assessment Narrative and Submit To Supervisor

As an ACDP employee, you must complete two ACDP Assessment per year. It’s your responsibility to submit a self-narrative of job objectives you’ve met. Your supervisor and the approving official review the submission and allocate percent pay increase based on your performance and position accordingly.

To enter your ACDP assessment, go to:

1. Menu > Employee > ACDP Assessment

2. Enter assessment narrative in the Employee Comments text box

💡 To prevent data loss, write out assessment in a separate Word document, copy document text, and paste into the Employee Comments text box

3. Click Save at any time to save your progress

4. When you’re ready to submit the narrative to your supervisor, click Submit to Supervisor 1
5. From the **Submit ACDP Assessment** dialog, click Yes

**Sign Approved ACDP Assessment**

Once approving official reviews and approves your ACDP assessment, your supervisor will communicate, sign and release pay adjustment decisions with you. At this point, you sign the approved appraisal to acknowledge that you received the assessment.

You’ll be notified of the release via email and CCA2Net (Menu > Home > Index under User **Notifications** panel).
To review and sign the released ACDP assessment:

1. Menu > Employee > ACDP Assessment

2. Click Sign

! Note: Sign button is only visible after supervisor signs and releases the ACDP assessment. Verify release by reviewing the assessment status next your name in the page header. It must read “Released.”

3. In the sign ACDP Assessment dialog, click Yes

ACDP EMPLOYEE DOWNLOAD APPROVED ACDP ASSESSMENT
Once both the supervisor and approving official approve and release your ACDP assessment submission, you can download a .pdf the detailed appraisal report. To generate a “.pdf”

- Menu > Employee > ACDP Assessment
- Click Supervisor 1 Approval
- Click Generate PDF

ACDP EMPLOYEE – ANNUAL ASSESSMENT

Annual Assessment steps for ACDP Employees are identical for all AcqDemo employees. Follow instructions covered in CCAS Employee Annual Assessment subsection of this user manual.

ACDP SUPERVISOR

This section pertains to users assigned the supervisory role for ACDP employees in CAS2Net. It provides a functional overview and guidance of CAS2Net processes for supervisor.

ACDP SUPERVISOR – CONTRIBUTION PLAN

Contribution Plan steps for ACDP employees and AcqDemo employees are identical. Follow instructions covered in Supervisor Contribution Plan subsection of this user manual.

ACDP SUPERVISOR - ACDP ASSESSMENT

ACDP Assessments are in addition to the CCAS annual appraisal. Supervisors overseeing ACDP employees are responsible for the following:
1. Ensure timely ACDP assessment objectives narrative submission by employee.

2. Review the Employee Comments for the ACDP assessment submission and either:
   a. Enter your recommended the percent of basic pay increase, the effective dates (from and to) for the increase and your supervisor appraisal narrative then submit the ACDP assessment to the approving official, or
   b. Return assessment to employee for modification.

3. Modify or sign and release ACDP assessment to employee based on approving official decision.

Once ACDP assessment is finalized and released back to the employee, you can download a .pdf record of the completed appraisal.

Return ACDP Assessment To Employee

1. Menu > Supervisor > ACDP Assessments

2. Select year from Fiscal Year dropdown.

3. To view user assessment details, select preferred employee from the table in Employee ACDP Assessments – Supervisor 1 panel.

4. Click Return to Employee.
5. In the Return ACDP Assessment dialog box, enter reason for return in the Justification box

6. Click Yes

---

Enter Supervisor Narrative and Submit Employee ACDP Assessment to Approving Official

After reviewing employee ACDP Assessment submission, you have the option to:

1. Enter supervisor assessment narrative and recommend a percent of basic pay increase for related employee
2. Submit employee assessment with supervisor narrative to the approving official

To submit the assessment to the approving official, go to:

- Menu > Supervisor > ACDP Assessments
- Select year from Fiscal Year dropdown
- To view user assessment details, select preferred employee from the table
• Enter your recommended percent of basic pay in the **Increase Percentage** box

• Enter **From Date** (start date for the new basic pay)

• Enter **To Date** (end date for the new basic pay, which should be the start date for the following six months or projected date for the maximum broadband level)

• Enter your narrative text in the **Supervisor Comments** text box

• Click **Save** at any time to save your progress

• Click **Submit to Approving Official**
From the Submit ACDP Assessment dialog box, click Yes

Return Approved ACDP Assessment to Approving Official
You’ll be notified of the approval via email and CCA2Net (Menu > Home > Index under User Notifications panel).
If you disagree with the percent increase adjustment or from/to dates, you can return the approved assessment to the approving official, go to:

1. **Menu > Supervisor > ACDP Assessments**
2. Select year from **Fiscal Year** dropdown
3. Select preferred employee from the table in Employee ACDP Assessments panel
   
   **Note:** Employee **Status** column must read “Approved Finalized” before you can return ACDP assessment to approving official.

4. Click **Return to Approving Official**
5. In the **Return ACDP Assessment dialog** box, enter reason for return in the **Justification** box.

6. Click **Yes**

**Release ACDP Assessment to Employee**

As stated, you'll be notified of the approval via email and CCA2Net (Menu > Home > Index under User **Notifications** panel).

At this point, the supervisor is responsible for reviewing with the employee and releasing approved assessment to the employee for his/her acknowledgment of the assessment, basic pay increase and signing the assessment.

To release ACDP assessment for employee signature, go to:

1. **Menu > Supervisor > ACDP Assessments**
2. Select current cycle year from Fiscal Year dropdown

3. To view user assessment details, select preferred employee from the table in Employee ACDP Assessments panel

4. Click Supervisor 1 Approval tab button

5. Select how you communicated with the employee from the Method of Communication checkbox options

6. Enter/select communication occurrence date into Date Communicated box

7. Enter ACDP IDP Date

8. Click Sign and Release to Employee
Click Yes

ACDP SUPERVISOR – ANNUAL ASSESSMENT

Annual Assessment steps for ACDP Employees are identical for all AcqDemo employees. Follow instructions covered in Supervisor Annual Assessment subsection of this user manual.

ACDP APPROVER/ PAY POOL MANAGER

This section pertains to users assigned the approving official role in CAS2Net. It provides a functional overview and guidance of CCAS processes for ACDP Approvers.
An approving official reviews and approves the ACDP Assessments and either approves the recommended percent of the ACDP basic pay or approves a modified percent increase.

ACDP APPROVE ACDP ASSESSMENT

1. Menu > ACDP Approving Official> ACDP Assessments

2. Select year from Fiscal Year dropdown

3. To view user assessment details, select preferred employee from the table
4. Approve/modify percentage in the Increase Percentage box (can also modify From Date and To Date)

5. Click **Save** at any time to save your progress

6. When you’re ready to approve appraisal, click **Approve**

7. From **Approve ACDP Assessment** dialog box, Click **Yes**

**ACDP RETURN ACDP ASSESSMENT TO SUPERVISOR FOR MODIFICATION**

1. Menu > ACDP Approving Official > ACDP Assessments

2. Select year from **Fiscal Year** dropdown
3. To view user assessment details, select preferred employee from the table in Employee ACDP Assessments panel

4. Click Return to Supervisor 1

5. In the Return ACDP Assessment dialog box, enter reason for return in the Justification box
OVERVIEW

A guest rater must be assigned by the administrator.

*Guest Raters* provide additional feedback on an indirectly monitored employee. A Guest Rater can be a supervisor or alternate rater providing valuable insight on the contribution and performance by the employee.

If you’re set as a guest rater, you’ll see the **Menu > Guest Rater** module in your navigation pane.

![Guest Rater Module](image)

ENTER GUEST RATER COMMENT

As a guest rater, you cannot initiate an assessment. If an assessment status is *Not Started*, contact the supervisor or employee and have them open the assessment module to initiate the assessment.

To enter guest rater comment, go to:

1. **Menu > Guest Rater > [Assessment-Name]**

   **Note:** Replace [Assessment-Name] with your preferred appraisal. You can choose from the following options:
   - Midpoint Assessment
   - Annual Assessment
   - Closeout Assessment

   For demonstration purposes we will use the Midpoint Assessments for guest rater entry in the following steps.

2. Select year from **Fiscal Year** dropdown
3. Select preferred employee to enter appraisal narrative

Employee Assessment

Employee Assessment has three panels

- General Information
- Contribution Planning
- Factors: Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support
- Check box to declare Guest Rater Narratives Complete

General Information panel has the information on the employee’s career path (NH, NJ, or NK), broadband level (I/1, II/2, III/3 or IV/4) and the expected OCS and contribution range to guide you as you develop and write the assessment
Contribution Planning panel, depending on the pay pool business rules may have mandatory objectives in addition to individual objectives, and the individual objectives may be in one text box or by the three factors. As the guest rater, you should review the objectives before completing the assessment.

Job Achievement and/or Innovation, Communication and/or Teamwork and Mission Support are the three factors that you will assess. You are encouraged to click Factor Description if you are not familiar with the CCAS contribution and performance standards for the career path and broadband level of the employee listed in the General Information panel.
When you click on Factor Description, you will see the expected contribution criteria for performance assessment and the discriminators and descriptors for contribution assessment.

### Expected Contribution Criteria

- Produces desired results, in the needed timeframe, with the appropriate level of supervision through the use of appropriate knowledge, skills, abilities and understanding of the technical requirements of the job. Achieves demonstrates and maintains the appropriate qualifications necessary to assume and execute key acquisition and/or support requirements. Demonstrates skilled critical thinking in identifying, analyzing and solving complex issues, as appropriate. Takes and displays personal accountability in leading, overseeing, guiding, and or managing programs and projects within assigned areas of responsibility.
- Work is timely, efficient and of acceptable quality. Completed work meets project/program objectives. Leadership and/or supervision effectively promotes commitment to organization goals. Flexibility, adaptability, and decisiveness are exercised appropriately.
- For Supervisors (as appropriate): Recruits, develops, motivates, and retains quality team members in accordance with EEO/AA and Merit System Principles. Takes timely, appropriate personal actions, communicates mission and organizational goals, by example, creates a positive, safe, and challenging work environment, distributes work and empowers team members.

### Discriminators

- Leadership Role
- Mentoring/Employee Development
- Accountability
- Complexity/Difficulty
- Creativity
- Scope/Impact

### Classification Level and Appraisal Descriptors

**NH Level I**

- Actively seeks opportunities to contribute to assigned tasks.
- Seeks and takes advantage of development opportunities. Takes initiative to pursue completion of qualification requirements. Effectively accepts feedback on assigned and accomplished work and incorporates it to create a better end-product.
- Resolves routine problems within established guidelines. Seeks assistance as required.
- Conducts activities on a collective task; assists supervisor, or other appropriate personnel, as needed.

**NH Level II**

- Actively contributes as a team member/leader; provides insight and recommends changes or solutions to problems.
- Identifies and pursues individual team development opportunities. Achieves and maintains qualifications and certification requirements.
- Proactively guides, coordinates, and consults with others to accomplish projects, assuming ownership of personal processes and products.
- Identifies, analyzes, and resolves complex, difficult problems.
- Plans and conducts functional technical activities for projects/programs.

**NH Level III**

- Considered a functional technical expert by others in the organization; is regularly sought out by others for advice and assistance.
- Identifies and resolves problems using advanced technical concepts and skills.
- Orchestras plans and techniques to accomplish organizational goals. Assumes ownership of processes and products, as appropriate.
- Develops, integrates, and implements solutions to diverse, highly complex problems across multiple areas and disciplines.
- Orchestras plans and techniques to resolve new situations to improve overall program and policies. Establishes precedents in application of problem-solving techniques to enhance existing processes.

**NH Level IV**

- Recognized as a technical functional authority within and outside of the organization.
- Fosters the development of others by providing guidance or sharing expertise. Directs assignments to encourage employee development and cross-functional growth to meet organizational needs. Pursues professional self-development.
- Leads, defines, manages, and integrates efforts of several groups or teams. Assumes and assigns ownership of processes and products, as appropriate.
- Assesses and provides strategic direction for resolution of mission-critical problems, policies, and procedures.
- Works with senior management to establish new fundamental concepts and criteria and stimulate the development of new policies, methodologies, and techniques.
- Orchestras strategic goals into programs or policies. Defines, establishes, and directs organizational focus on challenging and highly complex projects/programs.

**Score Range**

- NH Level I: Score Range 0-29
- NH Level II: Score Range 22-66
- NH Level III: Score Range 61-83
- NH Level IV: Score Range 79-100

- Job Achievement and/or Innovation tab.
- Enter your comments in the textbox in **Guest Rater** box under **Job Achievement and/or Innovation** tab. You can enter up to 4,000 characters per factor.
  
  Repeat step 6 for **Communication and/or Team Work** and **Mission Support** tabs

- Click **Save** at any time to save your progress

- Check **Guest Rater Narrative Complete** checkbox at the bottom of the page
FUNCTIONAL REVIEWER

OVERVIEW 199

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OVERVIEW
This section pertains to users assigned the Functional Reviewer role. As a Functional Reviewer you monitor progress of contribution plans and assessments for employees assigned to you by the administrator. You can review and print reports and track employee appraisal progress/status but cannot approve or modify any appraisals because reviewers have a read-only role in CAS2Net.

Functional reviewer role is assigned by the pay pool administrator.

To access Functional Reviewer items in your navigation menu, go to:

Menu > Functional Reviewer

REVIEW APPRAISAL STATUS
To review individual plan or assessment, go to:

- Menu > Functional Reviewer > [assessment-name]

| Note: | Replace [assessment-name] with report name with the plan/assessment you prefer. Options include Contribution Plans, Midpoint Assessments, Annual Assessments, Closeout Assessments, and Archived Appraisals. This example uses Contribution Plans to highlight appraisal viewing steps. |

- Select year from Fiscal Year dropdown
- From the table, select employee to view assessment
• Contribution Plan page preview for selected employee:

DOWNLOAD APPRAISAL REPORT(S)

1. Go to, Menu > Functional Reviewer > Reports

2. From the Fiscal Year dropdown, select the year for desired report
3. Click [report-title] button

! Note: Replace [report-title] with report name you wish to generate.

4. Filter rows to meet your criteria if needed. The following are available report filter options:
   a. From the Show Entries dropdown select number to define number of rows to display
   b. Use the Search box – lookup search term in all columns
   c. Text boxes under column headers – lookup search term in the column that it’s defined under

5. Select corresponding checkboxes in Select column for employee/s you prefer; To check all values listed in the table, select checkbox directly below Select column header

6. Click Continue

💡 The report is saved and available in the file directory your specified download directory
OVERVIEW

Managers can view employee appraisal details, pay pool/sub panel appraisal status, CAS2Net reports across all users and organization level(s) they oversee. However, a manager cannot take any administrative/supervisory actions. They only have read-only access unlike their administrator and supervisor counterparts.

As a manager, you monitor and ensure status/execution of CCAS and/or ACDP (if applicable) appraisals.

Modules under Menu > Manager:

1. **Appraisal Status** – available after Oct 1
2. **Contribution Plans**
3. **Midpoint Assessments**
4. **Annual Assessments**
5. **ACDP Assessments** - only visible if your pay pool defines it in its business rules
6. **Archived Appraisals**
7. **Reports**

DASHBOARD

CAS2Net generates dynamic pie charts to visually display your employees’ progress the following CCAS appraisals:

- Contribution Plan
- Midpoint Assessment
- Annual Assessment

To view pie chart, go to:

1. **Menu > Home > Index**
2. From radio buttons in Manager Dashboard panel, select preferred fiscal year
EMAIL USERS FROM DASHBOARD

Dashboard charts are responsive meaning you can click a region of the pie chart and reveal a pop-up window populated with user details table of employees that represent the selected region of the pie chart. Additionally, you can generate a new email to all or select users directly from pop-up dialog.

To email users through the dashboard charts, go to:

- Menu > Home > Index
- From radio buttons in Manager Dashboard panel, select preferred fiscal year
- Pick any one of the three pie charts, use the chart labels to determine what appraisal status each color represents, and select desired region

- Hover over preferred status in pie chart to display count of employee(s) at that status level
- Select from drop down to filter pie chart results based on Supervisor 1/2 or Functional reviewer
In the pop-up dialog table, select checkboxes for employees you want to email; To email all employees, select checkbox directly below the Select column header

Click Email
- A new Outlook email dialog will appear with selected user email(s) in the Bcc line. Enter email body text.

- Click Send

**APPRAISAL STATUS**

You can monitor end of cycle CCAS activities at the organization and supervisor level through the *Appraisal Status* module.

To access your appraisal status, go to:
Menu > Manager > Appraisal Status
Appraisal Status page overview:

1. **Fiscal Year** – current cycle year

2. **Organization Levels** panel – contains table with appraisal status details of pay pool(s)/sub panel(s) you manage
   
   a. First table row highlights appraisal status for your current pay pool. Preceding row(s) show appraisal status for sub organization(s) directly under your managed

   i) If your pay pool has **NO** sub organization(s), table will only have one row with current pay pool appraisal status

   b. If your pay pool has sub organization(s), the first row highlights appraisal status for your current pay pool. Preceding row(s) show appraisal status for sub organization(s) directly under your managed pay pool in CAS2Net’s organization structure hierarchy.
i) Responsive table - You can click a sub organization row and navigate to selected sub organization view appraisal status page. See for more information, see Sub Organization Level Appraisal Status

3. **Reset Data Table** button – refresh data table to reflect recent changes

4. **Supervisor** panel – contains table with employee appraisal completion details for supervisor 1’s
   o Responsive table - You can click any supervisor table row to see appraisal status details for employees managed under specified supervisor. See Appraisal Status by pay pool Supervisor

**SUB ORGANIZATION LEVEL APPRAISAL STATUS**

If your pay pool has sub organization(s), the first row highlights appraisal status for your current pay pool.

1. **Menu > Manager > Appraisal Status**

2. First table row in **Organization Levels** panel represents appraisal status for your current pay pool.
   Preceding row(s) show appraisal status for sub organization(s) directly under your managed; Select sub organization row from table in **Organization Levels** panel

   **Note:** You cannot select the first row because it represents appraisal status for the current pay pool (the active page). Additionally, organization name that begins with “*“ in the table don’t redirect you to another page on click.

3. If sub organization is further down the organization hierarchy, repeat step 2

   To determine where you are in the organization hierarchy refer to the breadcrumb link.
APPRAISAL STATUS BY PAY POOL SUPERVISOR

1. Menu > Manager > Appraisal Status

2. From table in Supervisor panel, select supervisor row to view user details (name, status, scores, etc.) of employee(s) that make up the Appraisal Started and Appraisal Complete column
REVIEW EMPLOYEE APPRAISALS – CONTRIBUTION PLAN, MIDPOINT/ANNUAL/ACDP ASSESSMENT, AND ARCHIVED APPRAISALS

You can view employee appraisal details for the following appraisals:
• Contribution Plans
• Midpoint Assessments
• Annual Assessments
• ACDP Assessments - only visible if your pay pool defines it in its business rules

While you can view employee appraisal narratives, you cannot edit/approve them. To view employee contribution plan, annual assessment, midpoint assessment and/or ACDP assessment details, go to:

1. **Menu > Functional Reviewer > [appraisal-type]**

<table>
<thead>
<tr>
<th>! Note:</th>
<th>Replace [appraisal-type] with your preferred plan/assessment. Options include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Contribution Plan</td>
</tr>
<tr>
<td>2.</td>
<td>Midpoint Assessments</td>
</tr>
<tr>
<td>3.</td>
<td>Annual Assessments</td>
</tr>
<tr>
<td>4.</td>
<td>Closeout Assessments</td>
</tr>
<tr>
<td>5.</td>
<td>ACDP Assessments</td>
</tr>
<tr>
<td>6.</td>
<td>Archived Appraisals</td>
</tr>
</tbody>
</table>

This example uses **Contribution Plans** to highlight appraisal viewing steps.

2. Select year from **Fiscal Year** dropdown

3. From the table, select employee to view assessment
Contribution plan for employee Blue Bird:
REPORTS

APPRAISAL STATUS REPORT

- Menu > Manager > Reports
- From the Fiscal Year dropdown, select the year for desired report
- From Fiscal Year Based Reports panel, click Appraisal Status button
From **Select Appraisal Status Options** dialog, choose fields to display in the report; Alternatively, select **Check All** if you want all fields displayed in the report

**Note:** Grayed out checklist items are disabled for user edit and print as column fields by default in the downloaded report

- Click **Continue**
From Select Organization(s) dialog, select preferred organization to display pay pool data; Select Check All display all managed organization(s) data

Click Continue

The report is saved in your specified download directory as an “.xlsx” (Excel) format workbook.

USER APPRAISAL DETAILS REPORT

You can generate in .pdf file format with appraisal scores (if applicable), appraisal results analysis, and more for the following CCAS/ACDP modules:

1. Contribution Plan
1. Midpoint Assessment
2. Annual Assessment
3. Closeout Assessment
4. Released Additional Feedback
5. ACDP Assessment

1. Menu > Manager > Reports
2. From the Fiscal Year dropdown, select the year for desired report
3. Click [report-title] button

! Note: Replace [report-title] with report name to generate. Module options include:
   6. Midpoint Assessment
   7. Annual Assessment
   8. Closeout Assessment
   9. Released Additional Feedback
   10. ACDP Assessment- only visible if your pay pool defines it in its business rules
4. Filter Option 1 – Filter by organization

   a. From Select Filter Criteria dialog, select **Organization** radio button

   b. Select preferred organization(s); Select **Check All** if want all fields displayed in the report
5. Filter Option 2 – Filter by employee
   a. From Select Filter Criteria dialog, select Employees radio button
   b. Select desired employees to populate report data

   ![Select Include Archived to list archived employee/s data in report](image)

6. Click Continue

   ![The report is saved in your specified download directory as a "pdf" format file.](image)

**SALARY APPRAISAL FORM**

1. Menu > Manager > Reports
2. From the Fiscal Year dropdown, select the year for desired report
3. Click Salary Appraisal Form button
4. From **Select Salary Appraisal Form Sections** dialog, select appraisal forms to include in report; Select **Check All** to include all CCAS appraisal forms in report

5. Click **Continue**

6. Filter Option 1 – Filter by organization
   a. From **Select Filter Criteria** dialog, select **Organization** radio button
b. Select preferred organization(s); Select Check All if want all fields displayed in the report

7. Filter Option 2 – Filter by employee
a. From Select Filter Criteria dialog, select Employees radio button
b. Select desired employees to populate report data

💡 Select Include Archived to list archived employee/s data in report

7. Click Continue
The report is saved in your specified download directory as a ".pdf" format file.

CURRENT REPORTS - EMPLOYEE ROSTER, SUPERVISOR ROSTER

Process of generating employee roster report and supervisor roster report are identical after selection in step 2.

- Menu > Manager > Reports

- From Current Setting Reports panel, select either Employee Roster button or Supervisor Roster button.
From **Select Organization(s)** dialog, select preferred organization to display pay pool data; Select **Check All** if want all fields displayed in the

- **Click Continue**

💡 The report is saved in your specified download directory as an “.xlsx” (Excel) format workbook.

- Open downloaded workbook and select the second tab sheet in the Excel workbook to view data
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- CAS2Net Results For Previous Years
- Employee Data (Current CCAS Cycle)
- Employee Roster
- Supervisor Roster
- Organization Roster
- Organization Role Roster

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  Unlock All Sub Panel/Pay Pool 348

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<tr>
<td>Download Employee Data</td>
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<tr>
<td>Upload Employee Data</td>
<td>352</td>
</tr>
<tr>
<td>Download PAT</td>
<td>355</td>
</tr>
<tr>
<td>PREVIOUS CYCLE DATA</td>
<td>356</td>
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<tr>
<td>Previous Cycle User Profile Page Overview</td>
<td>359</td>
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<tr>
<td>Delete Previous Cycle Data</td>
<td>362</td>
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<td>DISCREPANCY REPORT</td>
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<td>Summary</td>
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<td>Differences</td>
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<td>DCPDS Errors</td>
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<tr>
<td>CAS2net errors</td>
<td>367</td>
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<tr>
<td>CAS2net DCPDS warnings</td>
<td>369</td>
</tr>
</tbody>
</table>
OVERVIEW

This section provides instructions for CAS2Net administrator. As an administrator, you control access to appraisal modules at certain times of the year, generate and view reports, maintain user/organization data in CAS2Net, and use the offline interface to move data to and from the sub-panel and CMS.

Scope of user responsibility varies amongst administrators based on where their managed organizations fall in the organization hierarchy structure. While administrator scope may vary, role-based responsibilities are similar across organization levels.

! Note: The Home menu items Index, FAQs, About, Contact, What’s New and Refresh Session are explained in the General User Information subsection of this User Guide. The dashboards in Home > Index, however, will be discussed in greater details below.

Modules available in Menu > Administrator:
• **Appraisal Status** – Available after Oct 1
• **Offline Interface** - Available after Oct 1
• **Previous Cycle Data** - Available after Oct 1
• **Organization Management**
• **Pay Pool Notices**
• ** Archived Appraisals**
• **Reports**
• **Trusted Agent**
• **CCAS Management**
• **User Management**

**DASHBOARD**

CAS2Net generates responsive pie charts to visually display your employees’ progress the following CCAS appraisals:

1. Contribution Plan
2. Midpoint Assessment
3. Annual Assessment

To view pie chart, go to:

0. **Menu > Home > Index**

1. From radio buttons in **Administrator Dashboard panel**, select preferred fiscal year
2. From **Select Group / Pay Pool / Sub-Panel** dropdown, select preferred organization level
Dashboard charts are responsive meaning you can click on specified region in the pie chart and reveal user details of employee(s) that make up the selected region. For instance, in the pie chart example below, the blue area represents employees with approved contribution plan. On click of the blue area, a pop-up dialog window with user details appears for administrator review.
EMAIL USERS FROM DASHBOARD

- **Menu > Home > Index**
- From radio buttons in **Administrator Dashboard** panel, select preferred fiscal year
- From **Select Group/ Pay Pool/Sub Panel** dropdown, select preferred organization level
- To filter pie chart results by based on Supervisor 1/2 and/or Functional Reviewer select from related dropdown
- Use chart labels to determine what appraisal status each color for any one of the three pie charts and select desired region
- In the pop-up table, select checkboxes for employees you want to email; To email all employees, select checkbox directly below the Select column header
- **Click Email**
A new Outlook email dialog will appear with selected user email(s) in the Bcc line. Enter email subject and body text.

Click **Send**

**ORGANIZATION MANAGEMENT**

Administrators manage organization structure, business rules, and roles through the *Organization Management* module. To view *Organization Management* page, go to:
Menu > Administrator > Organizational Management

Organizational Management page overview:

Only administrators that manage more than one organization level will see the Top Level Organization panel. Skip step 2 if you do not see the following.

Reflects how your organization's structure is defined in CAS2Net.

Sub panels and pay pools under current organization level.

Users with roles to manage organization (Manager, Secondary Manager, Administrator, and Superuser).

Mandatory objectives for current organization level. Visible only if mandatory objectives are enabled in the Organization details panel.
ORGANIZATION DETAILS - PAY POOL CONTROLS

Administrators with permissions to access pay pool level(s) Organizational Management page have access and more control to set and manage both CAS2Net and CCAS process based on organization business rules than administrator with only sub-panel(s) level access.

These settings are located in Menu > Administrator > Organizational Management page under the Organization Details panel.

<table>
<thead>
<tr>
<th>Toggle Setting</th>
<th>Setting Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. First Year</td>
<td>Set to Yes if this is the first year for the pay pool. This will allow the pay pool to set CRI Percent at 2.4%, which is above the maximum funding level of 2.26%. Default is No for pay pools after first year.</td>
</tr>
</tbody>
</table>
2. Use Mandatory Objectives | Set to **Yes**, if your business rules have mandatory objectives. Enabling it allows administrators to create mandatory objectives and allows administrator and supervisors to assign them.

3. Contribution Plan by Factors | Set to **Yes**, if your business rules require that contribution plans use three factor text boxes versus the one text box for contribution objectives.

4. Require Employee Initiate and Submit | Set to **Yes**, to require employee to initiate contribution plan and appraisals. This means that the supervisor cannot initiate appraisal(s) on behalf of the employee. Supervisors also cannot view employees’ contribution plans and appraisal(s) unless employees initiate them first.

5. Require Approved Plan | Set to **Yes**, if employee must have an approved Contribution Plan before starting his/her Mid-Point or Annual Assessment. If toggle is set to **No**, the employee can initiate and submit a Mid-Point or Annual Assessment, but CAS2Net won’t let the supervisor approve employee’s assessment if an approved contribution plan isn’t in place.

6. Require Approved Midpoint | Set to **Yes**, if employee must have an approved midpoint assessment before starting the annual assessment. If toggle is set to **No**, the employee can initiate and submit an annual assessment without an approved midpoint assessment.

7. Supervisor Enters Numeric Scores | Set to **Yes**, to allow supervisor to enter numeric scores for employee annual assessments. If set to **No**, numeric scores are not available for the supervisors. Numeric scores will be provided from the Sub Panel Spreadsheet and/or CMS export and upload to CAS2Net.

8. Require Supervisor 2 Approval | Set to **Yes**, if local business rules require a 2nd Level Supervisor to approve employee’s contribution plans, midpoints, additional feedback, closeouts and annual assessments.

9. Can Set Cash Differential | Set to **Yes**, if local business rules allow using the Supervisor / Team Lead cash differential. This will enable CAS2Net Administrators to populate the situation
for providing the cash differential along with the percentage in the employee’s user profile.

<table>
<thead>
<tr>
<th>10. Time Off Award</th>
<th>Set to <strong>Yes</strong>, if business rules allow employees to request applying their Contribution Award to Time Off Award hours.</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Control Point By OCS</td>
<td>Set to <strong>Yes</strong>, if local business rules use OCS control point instead of salary-based control point. Enabling this control shows the OCS control point in the user profile.</td>
</tr>
<tr>
<td>12. Factor Weights:</td>
<td>The three factor weights default to 1 but can be adjusted based on business rules.</td>
</tr>
<tr>
<td>1. Job Achievement and/or Innovation Factor Weight</td>
<td>IAW AcqDemo OpGuide 6.8.7.3: The following parameters are provided for weighting factors: 1) Weights may not be less than 0.5 for any factor but may be assigned any value, from 0.5 to 1.0 in increments of 0.1. 2) At least one of the three factors must have a weight of 1.0. 3) Weighting may not result in any factor becoming zero.</td>
</tr>
<tr>
<td>2. Communication and/or Teamwork Factor Weight</td>
<td></td>
</tr>
<tr>
<td>3. Mission Support Factor Weight</td>
<td></td>
</tr>
<tr>
<td>13. CMS settings</td>
<td>Can be set in Organization Management for download and import to the Compensation Management Spreadsheet (CMS). Settings will be updated whenever a CMS export file is uploaded to CAS2Net.</td>
</tr>
<tr>
<td>CRI Target</td>
<td>The process of downloading from CAS2Net &gt; Offline Interface, import to the Sub-Panel Meeting Spreadsheet (SMS) or CMS and the export from the spreadsheets then uploaded via Offline Interface to CAS2Net is called a roundtrip.</td>
</tr>
<tr>
<td>CRI Percent</td>
<td></td>
</tr>
<tr>
<td>CRI Set Aside</td>
<td></td>
</tr>
<tr>
<td>CRI Min Amount</td>
<td></td>
</tr>
<tr>
<td>CRI Min Carryover</td>
<td></td>
</tr>
<tr>
<td>CA Target</td>
<td></td>
</tr>
<tr>
<td>CA Percent</td>
<td></td>
</tr>
<tr>
<td>CA Set Aside</td>
<td></td>
</tr>
<tr>
<td>CA Min Amount</td>
<td></td>
</tr>
</tbody>
</table>
ORGANIZATION HIERARCHY

The Organization Hierarchy displays a hierarchy chart of how your Sub Panel/ Pay Pool is structured in CAS2Net

1. **Menu > Administrator > Organizational Management**

2. If you see **Top Level Organization** panel, select desired organization level. Otherwise, skip to step 3

1. **Note:** Only administrators that manage more than one organization levels will see **Top Level Organization** panel. Skip step 2 if you do not see the following:

3. In the **Organization Hierarchy** panel ribbon, click ✮

💡 Organizations with a black border have sub-organizations and can be expanded, while organizations with a grey border do not have sub-organizations and cannot be expanded.
**SUB ORGANIZATION MANAGEMENT**

A *sub organization* is a pay pool or sub panel that branches out below your organization level. If your current organization level has sub organization(s), you have the administrative permissions to navigate to and manage those sub organization levels individually. Sub organization(s) don't have permission to access or edit parent organization details.
Navigate to Sub Organization Details Page

To manage and make manage details, user roles, and/or mandatory objectives for particular sub organization and not your entire pay pool, you have to navigate to that particular sub panel/pay pool's organization details page first.

To view sub organization management page, go to:

- **Menu > Administrator > Organization Management**
- From the table in **Sub Organization Levels** panel, select desired Pay Pool/ Sub Panel.
- If the pay pool/sub organization you want to view is further down your organization's hierarchy structure, repeat step 2 until you reach the correct details page

Determine if you're in the right sub panel/pay pool organization details page by reviewing:

- Details under **Organization Details** panel
- Page navigation bread crumb links
Add Organization Level

Depending on the scope of your administrative role, you can add new sub panel and/or pay pool levels within your organization structure.

Add Level - Sub Panel

Administrators at all levels are permitted to add sub panel level(s) as a sub organization.

To add sub panel level, go to:

- **Menu > Administrator > Organization Management**
  - To add sub panel level(s) under a sub organization in your pay pool, you have to navigate related sub organization’s details page first. Follow steps highlighted in [Navigate to Sub Organization Details Page](#) before you continue to step 2.

- **Click Add Level**

- In the **Organization Details Panel**, enter **Identifier (Code)**, **Name**, and **Description**.
2. **Note:** Identifier (Code), pay pool number, for the pay pool and group levels are provided by the DoD AcqDemo Program Office.

- Click **Save**

![Add Organization Level](image)

**Add Level - Pay Pool**

Only component and group level administrators can add a new pay pool level. Check with the DoD AcqDemo Program Office before assigning the pay pool number (Identifier (Code)).

1. **Menu > Administrator > Organization Management**
   - To add sub panel level(s) under a sub organization in your pay pool, you have to navigate related sub organization’s details page first. Follow steps highlighted in [Navigate to Sub Organization Details Page](#) before you continue to step 2

2. **Click Add Level**

![Add Level](image)

3. In **Organization Details** panel, switch toggle button **Is Pay Pool** to **Yes**
4. Enter **Identifier(Code), Name, and Description**

5. Set toggle buttons to **Yes** or **No** based on your organization’s business rules
   a. See **Organization Details - Pay Pool Controls** for toggle key and factor weight settings descriptions mentioned in steps 5 and 6

6. Enter factor weights in **Job Achievement and/or Innovation Factor Weight, Communication and/or Teamwork Factor Weight, Mission Support Factor Weight** if your pay pool business rules require custom values aside from the default value of 1

3. **Note** If factor weights are used, administrators **MUST NOTIFY** the DoD AcqDemo Program Office or at AcqDemo.Contact@hci.mil to ensure the Sub-Panel Meeting Spreadsheet and Compensation Management Spreadsheet are set up for your factor weights.

**Move Organization Level**

Moving an organization is usually due to restructuring. In many cases, an Administrator creates a new pay pool and moves employees over to the new pay pool. Once all employees have been successfully moved, the old pay pool or sub-panel can be deleted

In CAS2Net, Administrators can move a pay pool and/or sub-panel to another organizational structure. Moving an organization pay pool and/or sub-panel will move all employees listed in that pay pool and/or sub-panel to the new organization group/pay pool

To move a Sub Panel or Pay Pool, go to:

1. **Menu > Administrator > Organization Management**
   a. To move a sub organization level, follow steps in **Navigate to Sub Organization Details Page** before continuing with step 2

2. Click **Move**
3. From dropdown in **Move Organization Level** dialog, select new organization hierarchy. If there are sub organization under the selected hierarchy, additional dropdowns will appear below your initial organization selection.

4. Click **Save** when you’re ready to move the organization.

**Delete Organization Level**

Before deleting an organization level, remove or transfer all user roles, user accounts, or additional sub-panels from the organization you intend on deleting.

a. **Menu > Administrator > Organization Management**
   
   a. To move a sub organization level, follow steps in [Navigate to Sub Organization Details Page](#) before continuing with step 2.

b. **Click Delete**
4. **Note:** You’ll receive the following error if there are employees assigned to the pay pool you want to delete:

![Cannot Delete Organization Error Message](image)

You must either transfer/remove/delete user roles and accounts to proceed with organization deletion.

![Organization Management Screen](image)

**c.** In the **Delete Organization Level** dialog, click **Delete**

![Delete Organization Level Dialog](image)

**ORGANIZATION ROLES -** MANAGER, SECONDARY MANAGER, ADMINISTRATOR, SUPER USER
In CAS2Net, users with Organization Roles support Pay Pool/Subpanel provisioning and management. There are four organization roles and they include Manager, Secondary Manager, Administrator, and Super User.

**Assign Organization Role**

1. Menu > Administrator > Organization Management
   
   a. To assign organization role(s) for users at the sub organization level, follow steps covered in Navigate to Sub Organization Details Page of this guide before continuing with step 2

2. In the User Roles panel, click Add Role

3. In Add/Edit Organization Role dialog, select preferred user to assign new role from the User drop-down

4. From the Role dropdown, select role to assign the user

5. Click Save

**EditExisting User's Organization Role**

1. Menu > Administrator > Organization Management
a. To edit organization role(s) for users at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. From table in User Roles panel, select preferred employee to edit organization role

3. From the Role drop-down in Add/Edit Organization Role dialog, select preferred new role for the user

4. Click Save

Delete Organization Role

1. Menu > Administrator > Organization Management

   a. To delete organization role(s) for users at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. From table in User Roles panel, select preferred employee to delete existing organization role
3. In Add/Edit Organization Role dialog, click Delete

4. In Delete Organization User Role dialog, click Delete

**MANDATORY OBJECTIVES**

Should your organization elect to use mandatory objectives, either the component, group, or pay pool level administrator must enable it before sub-panel level administrators can view and edit it.

Either the component level administrator or group level administrator must enable mandatory objectives. Sub Panel/Pay Pool managers cannot enable mandatory objectives. Mandatory Objectives panel isn't visible to administrators unless the group/component administrator enables it first.

**Enable Mandatory Objectives**

Only component or group level administrator can enable mandatory objectives. Sub-panel administrator cannot enable mandatory objectives.
1. Menu > Administrator > Organization Management
   a. To enable mandatory objective at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. In Organization Details panel, switch Use Mandatory Objectives toggle button to Yes

---

Add Mandatory Objectives

! Menu > Administrator > Organization Management

   o To add mandatory objective at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

! Click Add Mandatory Objective

! Enter Description - one-line title for objective

! Enter Objective Text - in depth description of objective

! Click Save
1. On save, two panels with tables will appear below the save button.

! In **Users in organization Not Associated to Objective** panel, select checkboxes from the *Select* column for users you want to assign the new mandatory objective

💡 Selected users will appear in table under the **Users Associated To Objective** panel

! Click **Save** again
Delete Mandatory Objectives

1. Menu > Administrator > Organization Management
   
a. To add mandatory objective at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2

2. In the Mandatory Objectives panel, click the icon next to mandatory objective you want to delete
Modify Mandatory Objective

1. Menu > Administrator > Organization Management
   a. To add mandatory objective at the sub organization level, follow steps in Navigate to Sub Organization Details Page before continuing with step 2.

2. In the Mandatory Objectives panel, select mandatory object you want to edit.

3. Make changes as needed. When you’re done, click Save to update mandatory objective.
# Edit Mandatory Objective

**Mandatory Objective for 0000 - Top Level Pay Pool**

### Description

- **Mandatory Objective for test pay pool 0000**

### Objective Text

Characters: 385

*Character count may differ from Microsoft® Word*

---

### Users Associated to Objective

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Is Supervisor (1 or 2)</th>
<th>Is Functional Reviewer</th>
<th>Acquisition Career Field</th>
<th>Occupational Series</th>
<th>Certification Level Complete</th>
<th>Supervisor 1</th>
<th>Supervisor 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>DUCK, DONALD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☑</td>
<td>ROSS, BOB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

---

### Users in Organization Not Associated to Objective

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Is Supervisor (1 or 2)</th>
<th>Is Functional Reviewer</th>
<th>Acquisition Career Field</th>
<th>Occupational Series</th>
<th>Certification Level Complete</th>
<th>Supervisor 1</th>
<th>Supervisor 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>BARROW, MAKSYMILIAN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>CORTES, LILIANNA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>DO, JANE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PAY POOL NOTICE

Pay Pool Notice is how the DoD AcqDemo Program Office and participating pay pools communicate and post files for the maintenance of user data and pay pool panel process.

CAS2Net compares its user data against Defense Civilian Personnel Data System (DCPDS) personnel data for discrepancies in an effort to ensure its user data is correct and up to date. The PMO office posts such discrepancy and unclaimed records reports in CAS2Net bi-monthly (on Wednesday following the start of each pay period). Administrators can access these reports through the Pay Pool Notices page.

It is your responsibility as an administrator to review the reports and correct any mismatches or work with the corresponding servicing personnel office in case DCPDS records are incorrect. If an employee’s user records are erroneous, need updates, and/or have warnings, you will receive a pay pool Notification. See the Discrepancy Report section below.
Also posted to Pay Pol Notices starting on 1 October are the annual *Sub-Panel Meeting Spreadsheet (SMS)* and *Compensation Management Spreadsheet (CMS)*. Multiple versions may be posted between October and December, so it is important for administrators to download and use the most current version of the spreadsheet.

To access the **Pay Pool Notices** page, go to:

Menu> Administrator > Pay Pool Notices

---

**DOWNLOAD PAY POOL NOTICE**

1. **Menu> Administrator > Pay Pool Notices**

2. From the *Notice* column in table under **Pay Pool Notices** panel, click *report link to download*

   The report will download into you specified download directory as “.xlsx” (Excel) format workbook.
DELETE NOTICE

1. Menu > Administrator > Pay Pool Notices

2. From the Select table in table under Pay Pool Notices panel, select checkboxes for reports you want to archive

3. Click Delete Selected Notice(s)

4. Click Yes
REPORTS

You can generate a range of reports based on user, organizational level, and/or CCAS cycle data in CAS2Net to help you better understand and manage your pay pool. File formats vary depending on the report you download (.pdf, .xlsx, or .csv).

To access the Reports page, go to:

Menu > Administrator > Reports

The following elements make up the Reports page:

💡 You may not see all report buttons as displayed below. This may be due to users not initiating/completing CCAS modules where you are in the CCAS cycle timeline, your pay pool business rules, and more.
**Fiscal Year Based Reports** panel

- Appraisal Status
- Pay Pool Status
- Contribution Plan
- Midpoint Assessment
- Annual Assessment
- Closeout Assessment
- Released Additional Feedback
- ACDP Assessment

**Current Settings Reports panel**

- Previous Cycle vs Current Profile
- CCAS Results for Previous Years
- Employee Data
- Employee Roster
- Supervisor Roster
- Organization Roster
- Organization Role Roster
Reports page has two panels, Fiscal Year Based Reports panel and Current Settings Reports panel, that distinguish fiscal year CCAS reports from data reports (based on the current settings in CAS2Net). The top panel is Fiscal Year Based Reports in which the Administrator can filter the Fiscal year up to the last 4 years plus current year. The second panel is Current Settings Reports which are all Excel format reports.

FISCAL YEAR BASED REPORTS

Appraisal Status Report
1. Menu > Administrator > Reports
2. From the Fiscal Year dropdown, select the year for desired report
3. Click Appraisal Status button

4. Select Appraisal Status Options dialog, choose fields to display in the report; Alternatively, select Check All if you want all fields displayed in the report

! Note: Grayed out checklist items are disabled for user edit and print as column fields by default in the downloaded report

_minutes_ The report will download into your set download directory as “.xlsx” (Excel) format file

5. Click Continue
Pay Pool Status Report

1. Menu > Administrator > Reports

2. From the Fiscal Year dropdown, select the year for desired report

3. Click Pay Pool Status button

4. From Select Organization dialog, select preferred organization to display pay pool data; Select Check All if you want all fields displayed in the report
5. Click Continue

The report will download into your set download directory as “.xlsx” (Excel) format file.

Employee Data Report (Historical)
1. Menu > Administrator > Reports
2. From the Fiscal Year dropdown, select the year for desired report
3. From Fiscal Year Based Reports dialog, select Employee Data button
4. From Select Employee Data dialog, choose fields you want displayed in the report; Select Check All if you want all fields displayed in the report

Note: Grayed out checklist items are disabled for user edit and print as column fields by default in the downloaded report.
5. **Click Continue**

6. **From Select Organization** dialog, select organization to display appraisal data

7. **Click Continue**

💡 The report will download into your set download directory as ".xlsx" (Excel) format file.
Appraisal Details Reports

CCAS reports generate detailed “.pdf” format reports of employee and supervisor appraisal narratives, appraisal scores (if applicable), appraisal results analysis, and more for the following CCAS modules:

- Contribution Plan
- Midpoint Assessment
- Annual Assessment
- Closeout Assessment (if created and approved)
- Salary Appraisal Form
- Released Additional Feedback (if discussed and released)
- ACDP Assessment (if applicable)

1. Menu > Administrator > Reports

2. From the Fiscal Year dropdown, select the year for desired report

3. Click [report-title] button

! Note: Replace [report-title] with report name to generate.

You can generate reports by organizations or by employees.

4. Filter Option 1 – Filter by organization
   a. Select Organizations;
   b. Select preferred organization(s) or select Check All if you want all fields displayed in the report
5. Filter Option 2 – Filter by employee
   
a. Select **Employees** radio button

b. Select desired employees to populate report data or check top Select box for all listed employees

Select **Include Archived** checkbox to list previously archived employees in the employee selection table.
CURRENT SETTINGS REPORTS

Previous Cycle vs Current User Profile

Previous Cycle Data vs Current User Profile report highlights discrepancies between previous cycle data and current user profile. Previous Cycle Data (PCD) is the user/employee’s information in CAS2Net on 30 September and PCD is used for the pay pool spreadsheets.

1. Menu > Administrator > Reports
2. Click Previous Cycle Data vs Current User Profile Report button

6. Click Continue

The report will download into your set download directory as “.xlsx” (Excel) format file.
3. Filter Option 1 – Filter by organization
   a. Select **Organizations** radio button
   b. Select preferred organization(s); Select **Check All** checkbox to include all pay pool and sub panel data in report

4. Filter Option 2 – Filter by employee
   a. Select **Employees** radio button
b. Select desired employees to populate report data

Select Include Archived checkbox to list previously archived employees in the employee selection table.

5. Click Continue
CAS2Net Results for Previous Years

This report provides the last four years of historical rating information on the users in the pay pool at the time of the report. Historical rating information include: Expected Overall Contribution Score (OCS), Approved OCS, Delta OCS, performance Rating of Record (ROR), Performance Appraisal Quality Level (PAQL) Factor 1 Score, PAQL Factor 2 Score and PAQL Factor 3 Score. To generate the report:

1. Menu > Administrator > Reports
2. Click CAS2Net Results For Previous Years button
3. From **Select Organization** dialog, select preferred organization to display related pay pool data; Select **Check All** if you want all fields displayed in the report

The report will download into your set download directory as "xlsx" (Excel) format file

4. Click **Continue**

Example of downloaded report (Columns A-L are pay pool user information and are not shown in the example):

![Example of downloaded report](image)

**Employee Data (Current CCAS Cycle)**

This report pulls all the data or specified data from the user profiles in your pay pool for you to view the desired data in an Excel spreadsheet format. To generate the report:
1. Menu > Administrator > Reports

2. From Current Setting Reports panel, select Employee Roster button

3. In the Select Employee Data Options, check the data elements for your report, click Continue

4. In the Select Organization(s), select All or check the preferred organization, click Continue
5. Wait for download

![Downloading...](image)

Please wait for download to begin!

6. Click Open to view the report or Save

![Open, Save, Cancel](image)

**Employee Roster**

This report provides the user profile data: CAS2Net ID, Last Name, First Name, MI, Suffix, EDIPI, Pay Pool, Office Symbol, Presumptive Status, Retain Pay, Career Path, BB Level, Occ Series, Base Salary, Locality Code, HRSO Code, Prev OCS, and Start Date

1. **Menu > Administrator > Reports**
2. From **Current Setting Reports** panel, select **Employee Roster** button

3. From **Select Organization(s)** dialog, select preferred organization to display pay pool data; Select **Check All** if want all fields displayed in the

4. Click **Continue**

   The report will download into your set download directory as “.xlsx” (Excel) format file.

5. Select **Employee Roster** tab to view data
Supervisor Roster

This report provides the Employee Name, Employee Email, Pay Pool, Office Symbol, Supervisor 1, Supervisor 1 Email, Supervisor 2, Supervisor 2 Email, Paypool Manager, Paypool Manager Email, Sub-Panel Manager, and Sub-Panel Manager Email.

1. **Menu > Administrator > Reports**

2. From **Current Setting Reports** panel, select **Supervisor Roster** button

3. From **Select Organization(s)** dialog, select preferred organization to display pay pool data; Select **Check All** if want all fields displayed in the
4. Click Continue

The report will download into your set download directory as “.xlsx” (Excel) format file.

5. Select Supervisor Roster tab to view data

Organization Roster

This report provides the Organization Name, Pay Pool Id, Organization Id, CAS2Net Id, AcqDemo User Count, and Non-AcqDemo User Count.
1. Menu > Administrator > Reports

2. From Current Setting Reports panel, select Organization Roster button

3. Select Organization Roster tab to view data

**Organization Role Roster**

This report provides the users associated with the roles in the organization: administrator(s), super user(s), secondary manager(s) and manager(s).

1. Menu > Administrator > Reports

2. From Current Setting Reports panel, select Organization Role Roster button
3. Select **OrganizationRoleRoster** tab to view data

**TRUSTED AGENT**

A *Trusted Agent* inherits permissions to temporarily fulfill supervisory duties for selected user/s if the current supervisor cannot perform the CCAS duties (e.g., supervisor not available due to TDY, extended leave, detail, etc.). You can assign any user in your organization the Trusted Agent role and specify which user/s the assigned Trusted Agent is expected to oversee. CAS2Net stores additional records to distinguish whether the Trusted Agent or supervisor performed a task. Remember to revoke a user of his/her Trusted Agent role upon supervisor’s return or when no longer required in this role.

To access the **Trusted Agent** page, go to:
Menu > Administrator > Trusted Agent

Trusted Agent overview:

Organization Level panel

Trusted Agent panel
Add Trusted Agent button

To view Trusted Agent/s and respective supervisor, go to:

4. Menu > Administrator > Trusted Agent

5. From the Select Pay Pool/Sub-Panel drop-down, select preferred organization level to populate table in Trusted Agent panel related user information

ADD TRUSTED AGENT

1. Menu > Administrator > Trusted Agent

2. From the Select Pay Pool/Sub-Panel drop-down, select preferred organization level

3. In the Trusted Agent panel, click Add Trusted Agent
4. From **User** dropdown in **Add Trusted Agent** dialog, select supervisor needing the trusted agent. Names in the dropdown are populated based on your selection in step 2
   
a. The active dialog box expands to display all users under selected supervisor’s management

💡 If Trusted Agent is outside of your pay pool, select the **Matrix** checkbox to populate dropdown with an expanded list of users

5. From the **Trusted Agent** dropdown, select the name of user entrusted as Trusted Agent

6. Select corresponding checkbox in the **Select** column for employee/s you’re assigning to the Trusted Agent

7. Click **Save**
DELETE TRUSTED AGENT

*Trusted Agents* are assigned supervisory duties temporarily. It’s the administrator’s responsibility to remove a user’s trust relationship upon supervisor’s return or no longer entrusted with these duties.

1. Menu > Administrator > Trusted Agent
2. From the Select Pay Pool/Sub-Panel drop-down, select preferred organization level
3. From the table in the Trusted Agent panel, select row with Trusted Agent name you want to delete
In the Edit Trusted Agent dialog, click Delete.

CCAS MANAGEMENT

Administrators monitor appraisal statuses and view appraisal narratives for their managed employees in the CAS2Net Management module. While administrators can view employee appraisal narratives, they cannot edit/approve them.

To view an employee Contribution Plan, Midpoint Assessment, and Annual Assessment, go to:

1. Menu > Administrator > CCAS Management > [Appraisal]

   ! Note: Replace [Appraisal] with your preferred appraisal. Options include:
   
   1. Contribution Plan
   2. Midpoint Assessment
   3. Annual Assessment
2. Select year from **Fiscal Year** dropdown

3. From the table, select employee to review assessment
GRIEVANCES

Grievances Overview

The grievance module is a means of submitting, documenting, and resolving adjustments related to employee annual assessment results. Employees can initiate grievances about one or more of the following:

- Categorical scores
- Numerical scores
- Performance Appraisal Quality Level (PAQL) scores
- Supervisor narrative assessment

As an Administrator/Super User you can facilitate, oversee, and administer the grievance process for employees in your organization. You cannot modify an employee grievance. However, you can review the grievance, return it to the employee or supervisor for modifications, and review and submit grievance to pay pool manager for decision.

Grievance process overview:
There are two ways to start the grievance process: (1) Administrator sets grievance window with start and end dates of when an employee grievance is accepted, or (2) employee informs the administrator that s/he wants to submit a grievance.

Administrator receives employee’s grievance, reviews it, and forwards it to supervisor.

- You’ll be notified of employee grievance and status via email and in CAS2Net under Menu > Home > Index.
- Review process:
  - Grievance is for the recently completed rating period.
  - Grievance was submitted within the stated grievance time or window for the organization.
  - Grievance is not on midpoint review, closeout and/or additional feedback received throughout the rating cycle.
  - Grievance is not on the supervisor recommended scores, or any recommended scores submitted by the sub-pay pool panel (if applicable).
  - Grievance did not request a lower score than the approved categorical, numerical or performance score(s).
  - Allegations that the rating was based on prohibited discrimination, such as race, color, religion, sex, national origin, age, physical or mental disability, or reprisal may not be processed through the CCAS grievance process and that the pay pool manager may cancel/deny the request.
  - Grievance is complete, e.g., ensuring attachment(s) are included as employee stated in Basis for Change.

Supervisor reviews employee grievance and provides recommendations and narrative that support supervisor recommendation to either approve, approve with adjustment, or disapprove grievance within 10 days, or IAW local business rules, of employee submission to supervisor in CAS2Net.

Administrator upon receipt of supervisor recommendation, reviews grievance, and either forwards it (supervisor recommendation and employee grievance) to pay pool manager or returns it to supervisor, if additional information or clarification to the grievance is required.

- You’ll be notified of supervisor grievance recommendation submission and status via email and in CAS2Net User Notification under Menu > Home > Index.

Pay pool manager reviews both employee grievance and supervisor recommendation and forwards the decision to the administrator. Pay pool manager may return the grievance to the administrator for modification or additional information.
• Administrator reviews the decision. If the decision is:
  o Granted Request: ensure User Profile > History > Past Assessments and Past Salary / Compensations were updated (note CAS2Net will automatically update based on manager’s decision on the grievance) and request/submit applicable personnel actions for GPI, revised CRI, revised CA, revised Carryover Award and revised Rating of Record.
  o Granted Request with Adjustment: ensure User Profile > History > Past Assessments and Past Salary / Compensations were updated (note CAS2Net will automatically update based on manager’s decision on the grievance) and request/submit applicable personnel actions for GPI, revised CRI, revised CA, revised Carryover Award and revised Rating of Record.
  o Denied Request: ensure a basis for denial is included.
  o Denied Request Due to Timeliness: ensure a basis for denial is included.
  o Denied Request Based on Prohibited Discrimination: ensure a basis for denial is included.

• Administrator releases pay pool manager’s decision to supervisor and employee.

To view the grievance page, go to:

! Note  In order to see the Grievance page listed as a menu item, the following must occur, either the pay pool has established a grievance window activating the Grievance Module for all to see or the employee must ask his/her pay pool administrator to activate the Grievance Module. See Set Grievance Window To Allow Employee Grievance Submission of this guide for detailed instructions.
Menu > Administrator > CCAS Management > Grievances

Grievances page overview:

Employee Grievances

General Information

1 Fiscal Year

2019

Employee Grievances - Administrator

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Email</th>
<th>Supervisor 1</th>
<th>Supervisor 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted to Manager</td>
<td>EMPLOYEE, FIRST C</td>
<td>[Redacted]</td>
<td>JOHN SMITH</td>
<td></td>
</tr>
<tr>
<td>Released</td>
<td>EMPLOYEE, FIRST</td>
<td>[Redacted]</td>
<td>JOHN SMITH</td>
<td></td>
</tr>
<tr>
<td>Employee Submitted to Pay Pool</td>
<td>EMPLOYEE, FIRST E</td>
<td>[Redacted]</td>
<td>JOHN SMITH</td>
<td></td>
</tr>
<tr>
<td>Employee Submitted to Pay Pool</td>
<td>FIRST, EMPLOYEE W</td>
<td>[Redacted]</td>
<td>JOHN SMITH</td>
<td></td>
</tr>
<tr>
<td>Draft</td>
<td>EMPLOYEE, FIRST R</td>
<td>[Redacted]</td>
<td>JOHN SMITH</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 5 of 5 entries
3. **Fiscal Year** dropdown

4. **Employee Grievances – Administrator** panel – contains table of employee(s) and the status of their grievances
   
   a. **Status column** in the table identifies where an employee is in the grievance process. See [Grievance Status table](#) in the [Grievance Status Description](#) section of this guide for detailed description of each grievance status.

**Employee Grievance Page Overview**

Items displayed in the grievance page vary based on employee’s grievance status, what the employee is grieving, the supervisor’s recommendation, the manager’s grievance decision, and current status of employee’s grievance.

This section provides the status of the grievances.

To review an employee’s grievance, go to:

1. Menu > Administrator > CCAS Management > Grievances

2. Select year from **Fiscal Year** dropdown.

3. From the table, select preferred employee to view employee’s grievance page.

Employee grievance page overview:
1. Employee’s grievance status
   a. See table Grievance Status portion of this guide for detailed description of each grievance status.

2. Fiscal year of the initiated grievance.

3. The General Information panel shows the employee information (Career Path, Broadband Level, Expected OCS and Range) to guide you as you review the grievance.

   ! Note The References and Acknowledgement of Applicability and Statement of Understanding panels are the same as listed in the employee grievance page and agreed upon when he/she submits the grievance.
4. The **References** panel lists grievance process resources in the Federal Register Notice and the AcqDemo Operating Guide. Both documents are available on the AcqDemo website. Administrators may add local business rules or other guidance to the References panel by going to Administrator > Organization Management > Organization Details panel > Pay Pool Additional References (Optional).

5. The **Acknowledgement of Applicability and Statement of Understanding** panel explains the conditions for submitting a grievance and what are and are not grievable.

7. Annual assessment factor button tabs for each assessment factor – **Job Achievement and/or Innovation, Communication and/or Teamwork, Mission Support**.
   a. Any content entered/adjusted only applies to the selected factor button. An employee can grieve any or all of the 3 factors.

8. **Yes/No** toggle buttons identifies whether the employee grieved annual assessment Scores, Supervisor Assessment or both.
9. **Approved Scores** – List the approved categorical, numeric and performance scores for the employee.

10. **Employee Requested Adjustment** – List the Requested Categorical Score, Requested Numeric Score, and Requested Performance Score by the employee.
    
    a. This field is only visible if employee set the **Scores** toggle button to **Yes** and had requested score(s) different from the approved score(s).

11. **Supervisor Recommends** – Contains supervisor recommendations. Supervisor had recommended one of the following:
    
    a. **Recommend Approval** – recommend approval of the employee’s grievance request in its entirety.
    
    b. **Recommend ApprovalAdjusted** – recommend approval with adjustments of the employee’s request.
    
    c. **Recommend Disapproval** – recommend disapproval of the employee’s grievance request in its entirety.

12. **Supervisor Recommended Adjustment** – Displays supervisor’s recommended categorical score, numeric score, and performance score.
    
    a. Field is only visible if supervisor recommends approval with adjustments.
    
    b. Recommended scores populate automatically based on the supervisor grievance recommendation.

13. **Manager Decision** – Displays manager’s decision for the categorical score, numeric score, and performance score.
14. **Justification** button – Displays both employee and supervisor basis for change, as applicable, for each factor.

15. **Employee Basis** textbox – Employee narrative to substantiate grievance.

16. **Basis for change** textbox – Supervisor narrative to substantiate grievance recommendation.

17. The **Narratives** button displays employee modifications to supervisor’s assessment narrative.

18. **Requested Change to Supervisor Annual Appraisal Narrative** – Displays employee requested changes to approved supervisor narrative.

19. **Supervisory Adjustment to Supervisor Narrative** - Displays supervisor’s adjustment to the supervisor narrative.

20. **Summary of Score Change Request** – Will display OCS Decision and ROR decision once the manager has signed and finalized a grievance.
Grievance Status

You can refer to an employee’s grievance status and determine where he/she is in the grievance process.

Employee grievance status can be found in the following locations:

1. **Status** column in table in **Menu > Administrator > CAS2Net Management > Grievances**

   ![Status column in table](image)

2. Individual employee grievance page heading once you select preferred employee from table in **Menu > Administrator > CAS2Net Management > Grievances > Employee Grievances - Administrator**

   ![Employee grievance page](image)

### Grievance Status Table

<table>
<thead>
<tr>
<th>Status</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Employee initiated grievance but hasn’t submitted grievance to supervisor.</td>
</tr>
<tr>
<td>Employee Submitted to Pay Pool</td>
<td>Employee submitted grievance. However, the grievance is first routed to the administrator. Pending grievance review, the administrator will take one of the following actions:</td>
</tr>
<tr>
<td></td>
<td>- Return grievance to employee for modification.</td>
</tr>
</tbody>
</table>
Enable Grievance

To enable the Grievance Module, the status must be Employee Signed. If employee wants to file a grievance without signing the annual assessment, you can bypass signature requirement for that individual. It is the

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted to Supervisor 1</td>
<td>Administrator reviewed employee grievance and forwarded it to supervisor. The supervisor is reviewing the grievance and drafting recommendation accordingly.</td>
</tr>
<tr>
<td>Supervisor Submitted to Pay Pool</td>
<td>The supervisor submitted the employee grievance recommendation. However, the grievance is routed to the administrator for review. Pending grievance review, the administrator will take one of the following actions:</td>
</tr>
<tr>
<td></td>
<td>- Return grievance to supervisor for modification - grievance status reverts back to Submitted to Supervisor 1.</td>
</tr>
<tr>
<td></td>
<td>- Forward grievance to pay pool manager if no further modifications are required - grievance status advances to Supervisor Submitted to Pay Pool.</td>
</tr>
<tr>
<td>Submitted to Manager</td>
<td>Administrator reviewed employee grievance and supervisor recommendations and submitted it to the pay pool manager. The Manager is reviewing the grievance and making the decision. Pending grievance review, the administrator will take one of the following actions:</td>
</tr>
<tr>
<td></td>
<td>- Return grievance to administrator for necessary action, i.e., return to either employee or supervisor for modification - grievance status reverts back to Supervisor Submitted to Pay Pool.</td>
</tr>
<tr>
<td></td>
<td>- Make decision on employee grievance – grievance status advances to Completed.</td>
</tr>
<tr>
<td>Completed</td>
<td>Pay pool manager made a decision on employee’s grievance. Upon manager decision, administrator, supervisor, and employee will see grievance status as Completed.</td>
</tr>
<tr>
<td></td>
<td>Completed does not provide a revised Salary Appraisal Form with recalculated OCS, RoR and/or CRI, CA, Carryover, New Base Pay, New Total Pay. See Release.</td>
</tr>
<tr>
<td>Released</td>
<td>Administrator releases grievance with manager’s decision to inform employee of the results. Upon release by the administrator, employee can print the revised Salary Appraisal Form with recalculated OCS, RoR and/or CRI, CA, Carryover, New Base Pay, New Total Pay. Employee reviews manager decision and signs grievance at this point.</td>
</tr>
</tbody>
</table>
administrator’s responsibility to record valid reason and allow employee to bypass assessment signature requirements.

**Bypass Offline Signature**

CAS2Net won’t allow grievances to be initiated by the employee until the employee has either signed the annual assessment and/or the administrator waived the signature requirement for the employee with justifiable reason(s) not to sign.

To bypass employee annual assessment signature requirement, go to:

1. **Menu > Administrator > CCAS Management > Annual Assessments.**
2. Select year from **Fiscal Year** dropdown.
3. From the table, select preferred employee to open related individual’s annual assessment page.
4. Click **Employee Signature Not Required.**
5. From signature bypass reasons listed in the **Employee Signature Not Required** dropdown, select option that fits the employee’s situation.

6. Click **Save** to confirm bypass.

---

**Set Grievance Window**

*Grievance window* is the specified time frame (start and end date) defined by the administrator to allow employees to initiate and submit grievances. Employees will not have access to the grievance module if you haven’t defined a grievance window for your organization. Please note that that grievance window only effects the employee’s ability to initiate a grievance themselves. If outside of the time frame the Administrator will still have the ability to initiate a grievance on the employee’s behalf.

To set a grievance window, go to:

1. **Menu > Administrator > Organization Management > Organization Details.**
2. In the **Grievance Start Date** box, use the date picker or manually enter the date that you want to **start accepting** employee grievances.
3. In the **Grievance End Date** box, use the calendar or manually enter the date that you want to stop accepting employee grievances. Typical grievance window is 15 calendar days, otherwise IAW local business rules.

4. Click **Save**.

Additional Settings under Menu > Administrator > Organization Management

<table>
<thead>
<tr>
<th>Toggle</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Sub Panel for Grievance Manager</td>
<td>Option if other than the pay pool manager, e.g., member of the pay pool panel, then toggle <strong>Yes</strong>.</td>
</tr>
<tr>
<td>Grievances Recalculate Time Off Award</td>
<td>Option to recalculate the CA to TOA for the grievance then toggle <strong>Yes</strong>.</td>
</tr>
</tbody>
</table>

**Return Grievance to Employee**

The administrator must return grievance to employee if additional information and/or modifications are required before submitting employee grievance to the supervisor and/or pay pool manager. You must communicate the reason(s) for return to the employee so employee can make necessary changes and resubmit.
Return grievance to employee functionality is only available when the employee submits grievance to the supervisor. You can determine if employee submitted grievance by reviewing the **Status** column of the table in **Menu > Administrator > CCAS Management > Grievances**.

- If **Status** column is set to “Employee Submitted to Pay Pool” you can send grievance back to employee for modification.
  - See table in **Grievance Status** section of this guide for detailed description of each grievance status.

To return grievance to employee, go to:

1. **Menu > Administrator > CCAS Management > Grievances**.
2. Select year from **Fiscal Year** dropdown.
3. From the table, select preferred employee to view grievance.
   - Refer to the **Employee Grievance Page Overview** portion of this guide if you need clarification or explanation of any field/s displayed in the employee grievance page.
4. Click **Return to Employee**.
5. Click **Yes** to confirm return.

After you return grievance to employee, grievance status falls back from “Employee Submitted to Pay Pool” to “Draft.”

**Return Grievance to Supervisor**

It’s the administrator’s responsibility to review and return grievance to supervisor if additional information and/or modifications are required before submitting both employee and supervisor grievance to the pay pool manager. You must communicate the reason/s for return to the supervisor so the supervisor can make necessary changes and resubmit.

Functionality to return grievance to supervisor is only available once the supervisor submits grievance for an employee. You can determine if supervisor made a recommendation or drafting a recommendation on the grievance by reviewing the related employee’s grievance **Status** column in the table in **Menu > Administrator > CCAS Management > Grievances.**
If the **Status** column is set to “Supervisor Submitted to Pay Pool,” you can send grievance back to supervisor for modification.

- See table in [Grievance Status](#) section of this guide for detailed description of each grievance status.

To return grievance to supervisor, go to:

1. **Menu > Administrator > CCAS Management > Grievances.**
2. Select year from **Fiscal Year** dropdown.
3. From the table, select preferred employee to view grievance.

Refer to the [Employee Grievance Page Overview](#) portion of this guide if you need clarification or explanation of any field/s displayed in the employee grievance page,
4. Click **Return to Supervisor**.

5. Click **Yes** to confirm return.
After the administrator returns the grievance to the supervisor, the grievance status falls back from “Supervisor Submitted to Pay Pool” to “Submitted to Supervisor 1.”

**Return Grievance to Manager**

There may be times when the approved grievance is returned to the manager, i.e., upon request of the manager, administrative correction, new pertinent information, etc.

Return grievance to manager functionality is only available after pay pool manager has routed the grievance decision to the administrator. You can determine if pay pool decision was made by reviewing the *Status* column of the grieving employee in the table in **Menu > Administrator > CCAS Management > Grievances**.

- If *Status* column is set to “Completed” you can send grievance back to the manager.
  - See table in **Grievance Status** section of this guide for detailed description of each grievance status.
To return grievance to manager, go to:

1. Menu > Administrator > CCAS Management > Grievances.
2. Select year from Fiscal Year dropdown.
3. From the table, select preferred employee to view grievance.

Refer to the Employee Grievance Page Overview portion of this guide if you need clarification or explanation of any field/s displayed in the employee grievance page.

4. Click Return to Manager.

5. Click Yes to confirm return.
After the administrator returns the grievance to the manager, the grievance status falls back from “Completed” to “Supervisor Submitted to Pay Pool.”

Submit Employee Grievance to Supervisor

The administrator is responsible for reviewing the employee grievance to ensure it is in accordance with the grievance policy as stated in the AcqDemo Operating Guide and/or your organization’s business rules before submitting to the appropriate person once cleared.

You can determine if employee submitted grievance by reviewing the Status column of the table in Menu > Administrator > CCAS Management > Grievances.

- If Status column is set to “Employee Submitted to Pay Pool” you can send that employee grievance to supervisor.
  - See table in Grievance Status section of this guide for detailed description of each grievance status.
To send employee grievance to supervisor, go to:

1. **Menu > Administrator > CCAS Management > Grievances.**

2. Select year from **Fiscal Year** dropdown.

3. From the table, select preferred employee to view grievance.

   Refer to the [Employee Grievance Page Overview](#) portion of this guide if you need clarification or explanation of any field/s displayed in the employee grievance page.

4. Click **Submit to Supervisor.**
5. Click Yes to confirm submission.

After submitting grievance to supervisor, grievance status progresses advances from “Employee Submitted to Pay Pool” to “Submitted to Supervisor 1.”

**Submit Supervisor And Employee Grievance to Pay Pool Manager**

Before you can submit an employee’s grievance to the pay pool manager, both the employee and supervisor must submit their portion of the grievance. You can determine whether the grievance and recommendations were made by both parties by reviewing the *Status* column of the table in Menu > Administrator > CCAS Management > Grievances.

- If *Status* column is set to “Supervisor Submitted to Pay Pool” you can send grievance to manager.
See table in Grievance Status section of this guide for detailed description of each grievance status.

To submit grievance to the pay pool manager, go to:

1. Menu > Administrator > CCAS Management > Grievances.
2. Select year from Fiscal Year dropdown.
3. From the table, select preferred employee to view grievance.
4. Click Submit to Manager.

Refer to the Employee Grievance Page Overview portion of this guide if you need clarification or explanation of any field/s displayed in the employee grievance page.
5. Click **Yes** to confirm submission.

After submitting grievance to manager, grievance status progress advances from “Submitted to Supervisor 1” to “Submitted to Manager.”

**Release Pay Pool Manager’s Grievance Decision to Employee**

Once the pay pool manager reviews employee grievance and supervisor recommendations and makes a decision by Sign and Finalize, the administrator, employee and supervisor will see the status change from “Submitted to Manager” to “Completed” on their respective grievance page. As an administrator, it is your responsibility to communicate pay pool manager’s grievance results (revised narrative, revised factor scores, revised OCS, revised RoR, and/or revised payout, as applicable in the Salary Appraisal Form. You can determine whether the pay pool manager made a grievance decision by reviewing the **Status** column of the table in **Menu > Administrator> CCAS Management > Grievances.**
• If *Status* column is set to “Completed” the employee and supervisor will see the status for the grievance changed to “Completed” in their respective grievance pages.

  o See table in **Grievance Status** section of this guide for detailed description of each grievance status.

A grievance marked as “Completed” means a decision was made by the manager but still would require the administrator to review and complete the following tasks before releasing the results to the employee:

• **Summary of Score Change Request of the grievance page:** review for the revised payout.

• **User Profile > History > Past Assessments** to ensure the adjustments to the supervisor narrative were made.

• **User Profile > History > Past Salary / Compensation** captured the adjustments from the **Summary of Score Change Requests** for CRI, CA, Carryover, New Base Pay as applicable.

• **Administrator > Reports > Salary Appraisal Forms** for the employee to confirm adjustments were duly recorded on the Salary Appraisal Form.

• **If Organization Management > organization Details > Grievances Recalculate Time Off Award** is set at Yes, then check the revised CA to TOA hours

• **Request or submit appropriate requests for personnel actions:**
  o **NOAC 894 - General Adjustment;**
  o **NOAC 891 - Regular Performance Pay;**
To release/communicate grievance results to employee, go to:

1. **Menu** > **Administrator** > **CCAS Management** > **Grievances**.
2. Select year from **Fiscal Year** dropdown.
3. From the table, select preferred employee to view grievance.
4. Click **Release to Employee**.
5. Click **Yes** to confirm release.
After releasing grievance decision to employee, grievance status progress advances from “Completed” to “Released.”

The “Released” status will populate Reports > Salary Appraisal Forms with the revised form for the employee’s signature.

The pay pool panel/manager’s decision is final unless the employee requests reconsideration by the next higher official. That official would then render the final decision on the grievance.

The Release Pay Pool Manager’s Grievance Decision to Employee will be updated with more details in the next version of the CAS2Net User Guide.

**USER MANAGEMENT**

Administrators are responsible for keeping user records up to date.

User the User Management module to maintain CAS2Net user records. Module functions include adding users, updating user information, transferring users to a new pay pool, supervisor assignment, and more.

Go to Menu > Administrator and expand the User Management dropdown to find the following management modules.
• Assigned
• Archived/Transfer
• Replace Supervisor 1
• Replace Supervisor 2
• Replace Functional Reviewer
• Bulk Add
• Bulk Update

USER ROLES IN CAS2NET

For roles Employee, ACDP Employee, Supervisor 1/2, Trusted Agent, Functional Reviewer, and Guest Rater:

1. assign role when adding new user through the Assigned page (see Add User) or when bulk adding users through the Bulk Add page (see Bulk Add Users)
2. update role when updating user profile through the Assigned page or when bulk updating users through the Bulk Add page (see Bulk Update User Profiles)

For roles Manager, Secondary Manager, Administrator and Super User

3. Can assign role only after the user is added to CAS2Net. After creating new user profile, assign or update role through administrator's Organization Management page (see Organization Roles - Manager, Secondary Manager, Administrator, Super User)

Employee - user is employed and assigned to an AcqDemo position

ACDP Employee – an AcqDemo employee in a developmental position

ACDP Approver - reviews and approves supervisor ACDP narrative and the percent basic pay increase for ACDP employee.
Supervisor 1 / Supervisor 2 - Supervisor 1 can enter/edit supervisor comments on contribution plan and assessments and approve unless local business rules requires approval by a Supervisor 2. Supervisor 2 can approve contribution plan and assessments based on pay pool's settings in Organization Management.

Trusted Agent - perform supervisory task in absence of the assigned supervisor. Assign this role if supervisor is or will be unavailable to perform the supervisory responsibilities in CAS2Net.

Guest Rater - provide assessments on an indirectly monitored employee. A Guest Rater can be a supervisor, matrix supervisor or alternate rater providing insight on the contribution and performance by the employee.

Functional Reviewer - monitor progress of contribution plans and assessments for employees assigned by the administrator. Role is identified by the component representatives. Functional reviewers have "Read only" organization records meaning they can review and print reports and track employee appraisal progress/status but cannot approve or modify any information in CAS2Net.

Manager/Secondary Manager – review employee appraisal details, pay pool/sub panel appraisal status, CAS2Net reports on all users and organization level(s) they oversee. However, a manager cannot take any administrative/supervisory actions. They only have read-only access unlike their administrator and supervisor counterparts.

Administrator - manage organizational hierarchy, user profiles, previous cycle data, and permissions, and support the annual CCAS and ACDP processes from contribution planning through the end of pay pool decisions.

4. Assigned by another administrator and/or super user in parent pay pool

Super User - A user who has the same capabilities as the "Administrator", with the additional functionality to impersonate any user within their assigned organization structure

5. Assigned by another super user in parent pay pool

ASSIGNED USERS

To find users in your pay pool or to add new users, go to:
Assigned page overview:

1. **Assigned Employees** panel – contains table with user and pay pool details of employees assigned to you

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2. **Reset Data Table** button – On click, clears any set filters and refresh table to reflect recent changes

3. **Add User** button – To add a new user to your organization level

4. **Impersonate** column only visible to administrator with super user role and related permissions

**User Profile Page Overview**

You can manage employee data (role, salary, permissions, etc.) through the user’s profile page. To access user profile page for an employee you oversee, go to:

1. **Menu > Administrator > User Management > Assigned**

2. From table in **List Assigned Users** panel, select preferred employee row

---

User profile page overview:
**General User Information** panel – contains user EDIPI, name, email, contact information, and role assignment options
**User roles toggle buttons** - toggle one or more user roles to **Yes** to give users related role permissions

- You may find one or more toggle commands grayed-out on your page. This is because your current permissions do not meet toggle configuration requirements
- For detailed description of each role see **User Roles** subsection of this guide

**Organization Information** panel – contains user’s start date (for AcqDemo, current organization, and position), career path, broadband level, occupational series, organization level, office symbol, HRSO, pay pool manager, sub panel manager details and more.

**Transfer User, User Change History, Supervisor 1 History, Organization History** buttons in **Organization Information** panel
Transfer User button – enables movement of user records to a temporary storage location for users moving from one Pay Pool to another. The receiving organization can access and retrieve transferred employee’s records.

- See Transfer User subsection for more information and instructions to transfer user.

User Change History button – On click, displays past changes/updates to user’s organization, career path, locality, basic pay, presumptive status, retained pay, control point salary, control point score, supervisor 1, supervisor 2, functional reviewer, and guest rater. The first two columns in the records show the when the change took place the name of the administrator who made the change.

Supervisor 1 History button – On click, displays past changes/updates to supervisor 1 assigned to user the name of the administrator who made the change.

Organization History button - On click, displays past changes/updates to user’s pay pool, sub panel, start date, and end date.
Salary Information panel – contains fields to manage user’s salary information.

Other User Information panel – contains eight Wildcard 1 – Wildcard 8 textboxes to enter additional user information based on pay pool panel preferences. Information added to these fields will download during the offline interface sessions.

Organization Roles panel

Trusted Agents panel – A Trusted Agent inherits permissions to temporarily fulfill supervisory duties for select user/s if existing supervisor cannot (e.g., Supervisor on extended leave):

- Contains two tables. The first table displays trusted users for current user profile. The second table displays employees who trust the current user as their trusted agent
**Mandatory Objectives** panel - *Mandatory objectives* are additional objectives in CAS2Net set the pay pool administrator based on your organization’s business rules.

- It is possible that you don’t see the mandatory objectives on your screen. Visibility varies based on pay pool administrator’s setup IAW local business rules.
- If you are a pay pool administrator and want to enable mandatory objectives for your pay pool see, *Mandatory Objectives* subsection of this guide.

**Post Cycle Activity, Archive, Cancel, Save** buttons

Post cycle activities are promotions, temporary promotions, change to lower broadband, and ACDP basic pay increases with an effective date after the end of the rating period on 30 September or a temporary promotion with an effective date before 3 Jul and expiration date after the first day of the first full pay period in January, which is effective date of the CCAS January payout. A post cycle activity must be completed for these stated events.

Select the applicable post cycle activity and fill in the required information.
Add User

The Administrator can create new user accounts for an individual to enable user access to CAS2Net.

To add a new user, go to:

1. Menu > Administrator > User Management > Assigned
2. In the Assigned Employees panel, click Add User
   1. You’ll be directed to another page where you can enter new user information

And click Save.
3. In the **General User Information** panel under the **Add User** page, enter values for fields with *Required label.

1. *Required fields include **EDIPI**, **First name**, **Last name**, **Email**, and **Organization Level** drop-downs.

4. In the **General User Information** panel under the **Add User** page, toggle preferred user role/s to **Yes** for the new user. Refer to [Error! Reference source not found.](#) portion of this guide for toggle role details and descriptions.

1. **Note:** You may find one or more toggle commands grayed-out on your page. This is because your current permissions do not meet toggle configuration requirements.

5. **Click Save**
ARCHIVE/UNARCHIVE USER

Employees leaving AcqDemo are archived in CAS2Net. The archival process removes departing user from the organization list of active users without deleting past records in case the user returns to AcqDemo in the future.

To view previously archived user, go to:

1. **Menu > Administrator > User Management > Archived/Transfer**
2. Select employee name to view archived employee profile

💡 Filter rows to meet your criteria, if needed. The following are available report filter options:

1. **Use the Search box** – lookup search term in all columns
2. **Text boxes under column headers** – lookup search term in the column that it’s defined under
Archive User

To archive employee leaving the organization, go to:

a. Menu > Administrator > User Management > Assigned

b. Select employee name to archive

Filter rows to meet your criteria if needed. The following are available report filter options:

- Use the Search box – lookup search term in all columns
- Text boxes under column headers – lookup search term in the column that it’s defined under
c. Click Archive

d. From Loss Date dropdown in Archive User, select employee’s last day

e. From Loss Reason dropdown in Archive User dialog, select reason employee left AcqDemo

f. Click Save
Un-archive User

If a previously archived employee returns after leaving AcqDemo for a period of time, you can restore employee’s past profile and data by unarchiving previously archived data. To unarchive, go to:

1. Menu > Administrator > User Management > Archived/Transfer

2. Select employee name to unarchive

💡 Filter rows to meet your criteria, as needed. The following are available report filter options:

- Use the Search box – lookup search term in all columns
- Text boxes under column headers – lookup search term in the column that it’s defined under

3. Click Un-Archive
4. In the Un-Archive Employee dialog, click Yes to verify your intent to unarchive employee.

**TRANSFER USER**

The Transfer module serves as an interim user records storage location for users moving from one Pay Pool to another. Records move to Menu > Administrator > User Management > Transferred/Archived page upon transfer by the losing organization so that the organization receiving the transferred employee can retrieve employee record. User records in Transferred/Archived page are visible to all administrators. The Transfer module is critical because a losing organization administrator may not have access to the new organization Pay Pool or Sub Panel records.

*Note:* Before transferring a user record, verify that the employee completed closeout assessment.

- Menu > Administrator > User Management > Assigned
- Select employee name to transfer
• In the **Organization Information** panel, click the **Transfer User** button

• In the **Transfer User** dialog, select user’s last day in the current organization from the **End Date** dropdown

• Select from **Gaining Organization** drop-down if you know the user’s new organization. Otherwise, leave the field blank

• Click **Save**
**Note:** Common error messages and necessary actions:

If an employee closeout assessment is pending supervisor review, you’ll receive the following error dialog:

```
Cannot Transfer Employee

Employee cannot be transferred because a closeout has been initiated that needs to be submitted and/or released.
```

Contact supervisor and ensure closeout assessment is completed so you can proceed with employee transfer.

If neither the employee or supervisor have initiated closeout, you’ll see the following dialog:

```
Transfer User

Employee does not have a closeout. Would you like to create a closeout and transfer the employee?
```

You can either discuss closeout narrative with supervisor and enter supervisor narrative yourself or contact supervisor to complete it.
On successful transfer, you can search and find the transferred user listed in Menu > Administrator > User Management > Archived/Transfer page

Receive Transferred User

You can retrieve user record for employee(s) transferring from another organization into your managed organization through the Archived/Transfer page

To retrieve user record, go to:

1. Menu > Administrator > User Management > Archived/Transfer

2. From checkboxes in the Select column of table with archived and transferred users, select checkboxes for user(s) to transfer

💡 Filter rows to meet your criteria as needed. The following are available report filter options:

- Use the Search box – lookup search term in all columns
- Text boxes under column headers – lookup search term in the column that it’s defined under

3. Click Continue
   a. You will be redirected to the Assigned User page
4. In the Assigned User page, use **Start Date in Organization** dropdown to pick transferring user’s start date

5. Switch **Is Demo Employee** toggle button to **Yes** if user is a *Demo Employee*

6. From **Organization(Pay Pool/Sub Panel)** drop-down, select desired organization level for user

7. From **Supervisor 1** and **Supervisor 2** (if applicable) select drop-down for appropriate supervisor

8. From **Locality** dropdown, select newly transferring user’s locality

9. Click **Save**
10. On save, user record moves from the **Assigned/Transfer** page to **Menu > Administrator > User Management > Assigned** page

**BULK ADD USERS**

You may find yourself in a situation where you need to create multiple user profiles in CAS2Net (e.g., new organization converting to AcqDemo). While you can create user profiles one-by-one in the **Assigned** page, it
can be quite tedious and time consuming depending on the number of profiles you’re creating. Instead, you can use the **Bulk Add** module to:

1. download a template Excel file
2. populate it with new users’ details
3. upload the file back into **Bulk Add** page and trigger mass user profiles creation

To download template and bulk add employee, go to:

1. **Menu > Administrator > Organization Management**
2. From the **Select Pay Pool** dropdown, choose the dropdown for which you wish to bulk add user
3. Take note of the **CAS2Net ID** in number under the **Organization Detail** panel as you’ll need it in step 7

4. **Menu > Administrator > User Management > Bulk Add**
5. Click **User Bulk Add Template File** to download template file and open it
6. In the Excel file, enter user information in related fields

♀ Required fields are identified with green column headers. They include EDIPI, OrganizationLevel, Email, LastName, FirstName

7. Enter CAS2Net ID noted in step 3 as values for OrganizationLevel column rows in the Excel file

8. When you’re ready to upload, delete row 2 of the file that describes column value format. Otherwise, you’ll receive an error on the upload

9. To upload file to CAS2Net, click Choose File in the Bulk Add page
10. Select file to upload from the location you saved the edited file

11. Click **Open**

12. Click **Upload Import File**

**BULK UPDATE USER PROFILES**

You may find yourself in a situation where you need to update multiple user profiles information (e.g., transferring users within your organization due to a reorganization). Depending on the number of users in
your organization, individual profile can be quite time consuming or implausible. The Bulk update module time-saving feature where you can:

- download a template Excel file
- enter related users EDIPI and update field/s
- upload edited file back into bulk update page and trigger mass user profile update

To download template and bulk update employee data, go to:

> Organizations with a black border have sub-organizations and can be expanded, while organizations with a grey border do not have sub-organizations and cannot be expanded

1. **Menu > Administrator > Reports**
2. From the **Select Pay Pool** dropdown, choose the organization level you wish to bulk add user
3. Take note of the **CAS2Net ID** in number under the **Organization Detail** panel as you’ll need it in step 7

4. **Menu > Administrator > User Management > Bulk Add**
5. Click **User Bulk Add Template File** link to download template file and open it
6. In the downloaded Excel file, enter user information in related fields
   Required fields are identified with green column headers. They include EDIPI, OrganizationLevel, Email, LastName, FirstName

7. Enter CAS2Net ID noted in step 3 as values for OrganizationLevel column rows in the Excel file

8. When you're ready to upload, **delete row 2 of the file** that describes column value format. You’ll receive an error on upload otherwise

9. To upload file to CAS2Net, click **Choose File** in the Bulk Add page
10. Select file to upload from the location you saved the edited file

11. Click Open

12. Click Upload Import File

**REPLACE SUPERVISOR 1/ SUPERVISOR 2/ FUNCTIONAL REVIEWER**

To replace Functional Reviewer or Supervisor 2, substitute reference to “Supervisor 1” in the highlighted steps with “Functional Reviewer” or “Supervisor” instead.

Process steps to replace Supervisor 1, Supervisor 2, and Functional Reviewer are almost identical. This guide captures steps to replace Supervisor 1 for demonstration purposes

- To replace Supervisor 2, substitute any reference to “Supervisor 1” in the highlighted steps with “Supervisor 2”
- To replace Functional Reviewer, substitute any reference to “Supervisor 1” in the following steps with “Functional Reviewer”
1. Menu > Administrator > User Management > Replace Supervisor 1

2. From Pay Pool drop-down, select organization level

3. From Supervisor 1 drop-down, select current Supervisor 1

4. From New Supervisor 1, select the user to replace current Supervisor 1

5. Click Save

6. In the Replace Supervisor 1 dialog, click Yes verify supervisor replacement
**IMPERSONATE USER**

Only administrators who are assigned *Super User* permissions can impersonate all users except another Super User within respective organization. The Program Office can override this rule on a case by case basis.

One reason to impersonate a user may be to recreate a user’s environment to help track system issues and view what the user is experiencing. Another reason may be to perform administrative transactions on behalf of the user you are impersonating.

Upon impersonation, you’re redirected to selected user’s welcome screen and menu options change to align with the user you’re impersonating. You’ll remain in the selected user’s CAS2Net portal until you either revert back to your account or the CAS2Net session times out due to inactivity. You can impersonate a user from the table in the **Assigned** page or through the user details page once you select preferred user in **Assigned** page.

**METHOD 1 – IMPERSONATE FROM ASSIGNED PAGE**

1. **Menu > Administrator > User Management > Assigned**
2. **Click**
3. Verify you’re impersonating the right user by taking note of the user name listed in the upper right hand corner of the page.

**Note:** In the following steps we will impersonate employee “Barrow, Maksymillian” for demonstration purposes.

1. **Menu > Administrator > User Management > Assigned**
2. **Click**
3. **Verify** you’re impersonating the right user by taking note of the user name listed in the upper right hand corner of the page.

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METHOD 2 – IMPERSONATE FROM USER DETAILS PAGE

- Menu > Administrator > User Management > Assigned
- From table in Assigned Employees panel, select the name of the user you’d like to impersonate
- From the General Information panel, click Impersonate user
- Verify you're impersonating the right user by taking note of the user name listed in the upper right hand corner of the page.

To switch back to your administrator portal, see instructions in Revert To Self

**REVERT TO SELF**

To switch back to your administrator portal from the impersonated user portal:

1. In the ribbon header, click impersonated user’s name to reveal dropdown options

2. Select Revert to Self from dropdown
APPRAISAL STATUS

**Note:** Appraisal Status page is only visible to Administrators once the AcqDemo Program Office activates on October 1st. The module remains open until the end of CCAS pay pool cycle.

End of cycle CCAS activities are tracked and managed in the Appraisal Status module. Use this module to safeguard the integrity of pay pool results and ensure timely completion of end of cycle activities.

Key module features:

1. Lock/Unlock pay pool before sub panel and/or pay pool panel deliberations to ensure integrity of the pay pool results
2. Update “Pay Pool Finalized Flag” once pay pool decisions are made by pay pool manager
3. Release appraisals to Supervisor once the PMO validates and completes the pay pool process

To view your organization’s appraisal status, go to:

Menu > Administrator > Appraisal Status.
Appraisal Status page overview:

5. **Fiscal Year** – current cycle year

6. Table in **Organization Levels** panel – contains table with appraisal status details of pay pool(s)/sub panel(s) you manage
   
   a. Fields with buttons to lock/unlock CMS uploads, scores, narratives at the pay pool/sub panel level(s)
b. First table row highlights appraisal status for your current pay pool. Preceding row(s) show appraisal status for sub organization(s) directly under your managed

i) If your pay pool has NO sub organization(s), table will only have one row with current pay pool appraisal status

c. If your pay pool has sub organization(s), the first row highlights appraisal status for your current pay pool. Preceding row(s) show appraisal status for sub organization(s) directly under your managed pay pool in CAS2Net’s organization structure hierarchy.

i) Responsive table - Click sub organization level row to see appraisal status for specified sub organization. See Navigate to Sub Organization Level Appraisal Status for more information

7. Reset Data Table button – refresh data table to reflect recent changes

8. Supervisor panel - contains table with employee appraisal completion details for supervisor 1’s

a. Fields with buttons to lock/unlock appraisal scores, narratives for specified supervisor(s)

    o Responsive table - Click any supervisor table row to see appraisal status details for employees under specified supervisor. See Appraisal Status by pay pool Supervisor

**NAVIGATE TO SUB ORGANIZATION LEVEL APPRAISAL STATUS**

1. Menu > Administrator > Appraisal Status

2. First row of table in Organization Levels panel represents appraisal status for your current pay pool. Preceding row(s) represents appraisal status for sub organization(s) under your managed pay pool organization structure; Select sub organization row from table in Organization Levels panel

! **Note:** You cannot select the first row because it represents appraisal status for the current pay pool (the active page). Additionally, organization name that begins with “*” in the table don’t redirect you to another page on click.

3. If sub organization is further down the organization hierarchy, repeat step 2

♀ To determine where you are in the organization hierarchy refer to the breadcrumb link.
LOCK CMS UPLOAD, SCORES, NARRATIVES

Lock Select Sub Panel/Pay Pool

1. Menu > Administrator > Appraisal Status

2. Navigate to preferred organization/sub organization. For sub organization navigations instructions, see Navigate to Sub Organization Level Appraisal Status.
1. To lock, switch toggle button in *Lock CMS Uploads* column to Yes. If you switch toggle to Yes for pay pool with sub organization, toggle key for sub organization(s) will also lock. See, Navigate to Sub Organization Level Appraisal Status if you want to unlock a specified sub panel.

**Lock All Sub Panel/Pay Pool**

- Menu > Administrator > Appraisal Status
- If you see the Select Organization Level (Pay Pool/Subpanel) drop-down, choose preferred organization. Otherwise, skip to step 3.
- Click Finalize and Lock Pay Pool

- In the Lock Pay Pool dialog, click Yes
UNLOCK FINALIZED PAY POOL

You can only unlock previously locked pay pool or sub panel as long as the PMO hasn’t already validated the pay pool.

Unlock Select Sub Panel/Pay Pool

To unlock pay pool, go to:

1. **Menu > Administrator > Appraisal Status**

2. Navigate to preferred organization/sub organization. For sub organization navigations instructions, see [Navigate to Sub Organization Level Appraisal Status](#).

3. To unlock, switch toggle button in *Lock CMS Uploads* column to **No**. If you switch toggle to **No** for for pay pool with sub organization, toggle key for sub organization(s) will also unlock. See, [Navigate to Sub Organization Level Appraisal Status](#) if you want to unlock a specified sub panel.

Unlock All Sub Panel/Pay Pool

1. **Menu > Administrator > Appraisal Status**

2. **Click Unlock Finalized and Pay Pool**
3. In the **Unlock Pay Pool** dialog, click Yes

![Unlock Pay Pool](image1.png)

**RELEASE PAY POOL**

After the PMO validates and completes the pay pool process, administrators are responsible for notifying and releasing appraisals to supervisor to release appraisals to supervisor, go to:

1. **Menu > Administrator > Appraisal Status**

2. From **Select Organization Level (Pay Pool/Subpanel)** drop-down, choose preferred organization

3. Click **Release Pay Pool**

![Appraisal Status](image2.png)

4. In the **Release Pay Pool** dialog, click Yes

![Release Pay Pool](image3.png)
OFFLINE INTERFACE

- **Note:** Offline Interface page is only visible to Administrators once the AcqDemo Program Office activates it on October 1st. The module remains open until the end of CCAS pay pool cycle.

Data upload/download for the Compensation Management Spreadsheet (CMS) Sub-Panel Meeting Spreadsheet (SMS), and Pay Pool Analysis Tool (PAT) spreadsheets take place in the Offline Interface module. As an administrator, you must take the following Offline Interface actions to manage sub-pay pool/pay pool:

- Download sub-panel/pay pool data
- Import the data into either the Sub-Panel Spreadsheet (sub-panel meetings) or the CMS (pay pool meetings) to support sub-panel and pay pool meetings. Make adjustments based on decisions made during the meetings
- Export sub-panel/CMS spreadsheet data
- Upload data file

You can also download employee data to upload to the PAT spreadsheet if you want to generate additional statistical views of your pay pool results.

The download-import-export-upload procedure is also known as a Round Trip. Refer to the “Spreadsheets for PPAs” training course in acqdemo.hci.mil/training.html#cas2net for more information regarding spreadsheets user and management.

Round Trip process steps for both Sub Panel and CMS spreadsheets are the same.
DOWNLOAD EMPLOYEE DATA

To download employee data from CAS2Net, go to:

- Menu > Administrator > Offline Interface
- From the CMS Download Type radio button options, select options from options to download employee data for CMS, Sub Panel, Both
- From Select Organization Level (Pay Pool/Subpanel) drop-down, choose pay pool/sub panel level
- Click Download Employee Data
Example of CMS employee data download:

**UPLOAD EMPLOYEE DATA**

After downloading and updating employee data from CAS2Net (see Download Employee Data) based on sub-panel/CMS meeting discussions, you have to export updated data from the sub-panel/CMS spreadsheet and upload it to CAS2Net to log changes.

To upload, go to:

1. Menu > Administrator > Offline Interface
2. From the CMS Download Type radio button options, select options from options to download employee data for CMS, Sub Panel, Both
3. From Select Organization Level (Pay Pool/Subpanel) drop-down, choose pay pool/sub panel level
4. Click **Upload Employee Data**

5. From **Upload CMS Spreadsheet** pop-up dialog, click **choose file**

6. Navigate to and select employee data file you exported from either the sub-pane/CMS spreadsheet

**NOTE:** Select only "_to_Master" to upload
7. **Click Upload**

On successful upload, you'll see the following banner message

And the date time group of your upload.
DOWNLOAD PAY POOL ANALYSIS TOOL (PAT)

You can upload CAS2Net employee data to the offline PAT spreadsheet and generate additional statistical views of your pay pool results.

1. **Menu > Administrator > Offline Interface**

2. From the **CMS Download Type** radio button options, select options from options to download employee data for **CMS, Sub Panel, Both**

3. From **Select Organization Level (Pay Pool/Subpanel)** drop-down, choose pay pool/sub panel level

4. **Click Download PAT**

5. Employee data will download a .zip folder with read-only employee data file in it. Navigate to your set download directory extract zip folder to open to get employee data file
PREVIOUS CYCLE DATA

*Previous Cycle Data* module lets administrator update employee records critical to the pay pool process. If user data updates are needed for an event that occurred on or before 30 September (previous cycle year), corrections must be made *Previous Cycle Data* module profile for those changes to be reflected in the next download in Offline Interface.

Possible scenarios that require user profile updates for the previous cycle year:

1. Correct user data inconsistency identified in discrepancy reports
2. Record user promotion/demotion effective on or before 30 September of the previous cycle year

Let’s assume cycle year 2020 (1 Oct 2019 – 30 Sep 2020) ended on September 30, 2020. The new cycle year 2021 begins, the following day on October 1, 2020. At this point CAS2Net reclassifies cycle year 2020 user data as previous cycle year. Cycle year 2021 becomes the current cycle year.

If user data need corrections for an event/inconsistency that occurred on or before 30 September, 2020 (previous cycle year), it must be made through the *Previous Cycle Data* page to be reflected in offline interface downloads.
Current cycle year changes from 2020 to 2021. 2020 is now previous cycle data.

Administrator can make changes to 2020 previous cycle year data in

Menu > Administrator > Previous Cycle Data

To access previous cycle data, go to:
Menu > Administrator > Previous Cycle Data

Previous Cycle Data page overview:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Pay Pool</th>
<th>Pay Pool Manager</th>
<th>Sub-Panel</th>
<th>Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRUSTED AGENT</td>
<td>TRUSTED <a href="mailto:AGENT.CIV@USERGUIDE.MIL">AGENT.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - HQ</td>
<td>MANAGER, Pay Pool</td>
</tr>
<tr>
<td>BRO, BLUE</td>
<td><a href="mailto:BU.BRO.CIV@USERGUIDE.MIL">BU.BRO.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 2</td>
<td>WOODPECKER, DEWEY</td>
</tr>
<tr>
<td>GARCIA, CAPPED</td>
<td><a href="mailto:GARCIA.CAPED.CIV@USERGUIDE.MIL">GARCIA.CAPED.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 2</td>
<td>WOODPECKER, DEWEY</td>
</tr>
<tr>
<td>DOVE, MOURNING</td>
<td><a href="mailto:DOVE.MOURNING.CIV@USERGUIDE.MIL">DOVE.MOURNING.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 3</td>
<td>SUPERVISOR, ACPD</td>
</tr>
<tr>
<td>EMPLOYEE, ACPD</td>
<td><a href="mailto:ACPD.EMPLOYEE.CIV@USERGUIDE.MIL">ACPD.EMPLOYEE.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 3</td>
<td>SUPERVISOR, ACPD</td>
</tr>
<tr>
<td>PINCH, GOLD</td>
<td><a href="mailto:PINCH.GOLD.CIV@USERGUIDE.MIL">PINCH.GOLD.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 1</td>
<td>ROBIN, AMERICAN</td>
</tr>
<tr>
<td>MARTIN, PURPLE</td>
<td><a href="mailto:MARTIN.PURPLE.CIV@USERGUIDE.MIL">MARTIN.PURPLE.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 3</td>
<td>SUPERVISOR, ACPD</td>
</tr>
<tr>
<td>ROBIN, AMERICAN</td>
<td><a href="mailto:AMERICAN.ROBIN.CIV@USERGUIDE.MIL">AMERICAN.ROBIN.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - HQ</td>
<td>MANAGER, Pay Pool</td>
</tr>
<tr>
<td>SPARRIN, CHIPPING</td>
<td><a href="mailto:SPARRIN.CHIPPING.CIV@USERGUIDE.MIL">SPARRIN.CHIPPING.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 2</td>
<td>WOODPECKER, DEWEY</td>
</tr>
<tr>
<td>STRADOR, ADMIN I</td>
<td>STRADOR.ADMIN <a href="mailto:I.CIV@USERGUIDE.MIL">I.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - HQ</td>
<td>MANAGER, Pay Pool</td>
</tr>
<tr>
<td>SUPERVISOR, ACPD</td>
<td>SUPERVISOR, <a href="mailto:ACPD.CIV@USERGUIDE.MIL">ACPD.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - HQ</td>
<td>MANAGER, Pay Pool</td>
</tr>
<tr>
<td>USER, SUPER</td>
<td><a href="mailto:USER.SUPER.CIV@USERGUIDE.MIL">USER.SUPER.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - HQ</td>
<td>MANAGER, Pay Pool</td>
</tr>
<tr>
<td>WARBLED, RUNGED</td>
<td><a href="mailto:WARBLED.RUNGED.CIV@USERGUIDE.MIL">WARBLED.RUNGED.CIV@USERGUIDE.MIL</a></td>
<td>User Guide Pay Pool</td>
<td>Pay Pool Manager</td>
<td>9000 Sub Panel - Division 1</td>
<td>ROBIN, AMERICAN</td>
</tr>
</tbody>
</table>

1. Previous cycle year
2. **Previous cycle employees** panel – contains table with users in your pay pool for cycle year 2020 along with related users' pay pool, pay pool manager, sub panel, and supervisor 1 information.

3. **Reset Data Table** button – On click, clears any set filters and refresh table to reflect recent changes.

**PREVIOUS CYCLE USER PROFILE PAGE OVERVIEW**

You can make changes to an employee’s previous cycle year user data (role, salary, promotions, etc.) by modifying the user’s previous year user profile through the previous cycle data module. To modify user profile, go to:

1. **Menu > Administrator > Previous Cycle Data**

2. From table in **Previous Cycle Employee** panel, select preferred employee row from table.

3. Update required fields as you need. Editable fields are identified with below:

   a. ⚫ - cannot update field; fields auto-populate from spreadsheet upload or change in presumptive status.

   b. 🔴 - cannot update field; fields auto-populate from history (2019).

   c. 🔴 - cannot update field; fields auto-populate based on by CAS2Net calculations based on Locality and Cash Differential Percent.

   **Note:** Data fields in gray are disabled and not editable.
### 2020 Cycle Data for BIRD, BLU

#### General User Information:

- **First Name:** BLU
- **Middle Name:**
- **Last Name:** BIRD

#### Organization Information:

- **Academic Start Date:** 10-10-2010
- **Start Date in Organization:** 10-10-2010
- **Position Start Date:** 10-10-2010

#### Select Information:

- **Retained Pay Status:** No
- **Starting Base Pay (2020):** $6,464.22
- **Locality:** RJO - Rest of US 15.01%
- **Locality Rate:**
- **New Base Pay (2021):** $6,672
- **Control Point OCS:** No
- **Allow Over Control Point:** Yes

#### Rating Information:

- **2018 DCS:**
- **2018 RDR:**
- **2019 DCS:**
- **2019 RDR:**
- **2020 DCS:**
- **2020 RDR:**
- **2020 Average Rating:** 3.7

#### Other User Information:

- **Webcam 1:**
- **Webcam 2:**
- **Webcam 3:**
- **Webcam 4:**
- **Webcam 5:**
- **Webcam 6:**
- **Webcam 7:**
- **Webcam 8:**

#### Additional Details:

- **Second Signature:**
- **Part 1 Remarks:**

---

360
4. Click **Save** to save any changes to user profile

5. From field data option checkboxes in the **Save Cycle Data** dialog, select fields you want to copy to the user's current user profile

6. Click **Save**
DELETE PREVIOUS CYCLE DATA

Once previous cycle user profile is deleted, user profile records are permanently deleted. You cannot retrieve the information after deletion.

- Menu > Administrator > Previous Cycle Data
- From table in Previous Cycle Employee panel, select employee row you want to delete
- Click Delete
- From delete Previous Cycle Record dialog, click Yes
DISCREPANCY REPORT

This section provides an overview of the Discrepancy Report capability that is now being processed as we run the DCPDS to CAS2Net Update.

SUMMARY

The DCPDS to CAS2Net Update script will run every 2 weeks along with the federal pay period calendar, and the results uploaded into Pay Pool Notices for each Pay Pool where the script identifies a difference, an error, or a warning. The filename format is dcpds_[DCPDS File Date]_[Script Run Date]_[Pay Pool Code]_[CAS2Net Org ID].xlsx, e.g., dcpds_20200513_20200513_9999_630.xlsx. DCPAS provides DCPDS data for AcqDemo employees on the Wednesday following the start of each Pay Period. As part of this process, the script will check the data for each employee to ensure that the information meets specific rules before the information is updated in CAS2Net. If the DCPDS information for the employee passes this set of rules, the employee record in CAS2Net will be updated with any updates from their DCPDS record. The spreadsheet will consist of the worksheets listed in the following table:

**DESCRIPTION OF WORKSHEETS**

<table>
<thead>
<tr>
<th>Worksheet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Differences</td>
<td>Identifies the differences between an employee’s DCPDS and CAS2Net records.</td>
</tr>
<tr>
<td></td>
<td>Cells with a ‘Green’ background displays the change that will occur to the</td>
</tr>
<tr>
<td></td>
<td>employee profile in CAS2Net.</td>
</tr>
<tr>
<td>DCPDS Errors</td>
<td>Identifies errors found with DCPDS Data. Cells with a ‘Red’ background</td>
</tr>
<tr>
<td></td>
<td>annotates the field(s) that may be in error.</td>
</tr>
<tr>
<td>CAS2Net Errors</td>
<td>Identifies errors found with CAS2Net Data. Cells with a ‘Red’ background</td>
</tr>
<tr>
<td></td>
<td>annotates the field(s) that may be in error.</td>
</tr>
<tr>
<td>DCPDS Warnings</td>
<td>Identifies warnings found with DCPDS Data. Cells with a ‘Yellow’ background</td>
</tr>
<tr>
<td></td>
<td>annotates the field that has a warning.</td>
</tr>
</tbody>
</table>

DIFFERENCES

This worksheet identifies updates to each employee’s user profile in CAS2Net based on the information contained in DCPDS, which is the system of record for this data. The report will only show employees where
the fields in CAS2Net do not match the corresponding fields in DCPDS. The report will display information to identify each employee who requires a change to their user profile in CAS2Net; followed by columns with 'Old' and 'New' fields corresponding to the fields in CAS2Net we are checking to identify differences between CAS2Net and DCPDS. Any differences are visually annotated with a green background for the spreadsheet cell corresponding to the New [Field] column. The cell with the green background shows the value we are updating in the employee’s user profile in CAS2Net.

**FIELDS CHECKED AND UPDATED**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Career Path</td>
<td>If ‘New Career Path’ is different than the ‘Old Career Path’, then the value in ‘New Career Path’ updates the ‘Career Path’ field in the ‘Organization Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New Band Level</td>
<td>If ‘New Band Level’ is different than the ‘Old Band Level’, then the value in the ‘New Band Level’ updates the ‘Broadband Level’ field in the ‘Organization Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New Occ Series</td>
<td>If ‘New Occ Series’ is different than the ‘Old Occ Series’, then the value in the ‘New Occ Series’ updates the ‘Occupational Series’ field in the ‘Organization Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New HRSO Code</td>
<td>If ‘New HRSO Code’ is different than the ‘Old HRSO Code’, then the value in the ‘New HRSO Code’ updates the ‘HRSO’ field in the ‘Organization Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New Loc Code</td>
<td>If ‘New Loc Code’ is different than the ‘Old Loc Code’, then the value in the ‘New Loc Code’ updates the ‘Locality’ field in the ‘Salary Information’ panel in the employee’s user profile. When ‘Locality’ is updated, the system will also display the new ‘Locality Rate’ automatically.</td>
</tr>
<tr>
<td>New Basic Pay</td>
<td>If ‘New Basic Pay’ is different than the ‘Old Basic Pay’, then the value in the ‘New Basic Pay’ updates the ‘Basic Pay’ field in the ‘Salary Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New Ret Pay</td>
<td>If ‘New Ret Pay’ is different than the ‘Old Ret Pay’, then the value in the ‘New Ret Pay’ updates the ‘Retained Pay Status’ field in the ‘Salary Information’ panel in the employee’s user profile.</td>
</tr>
<tr>
<td>New Pos Date</td>
<td>If the ‘New Pos Date’ is different than the ‘Old Pos Date’, then the value in the ‘New Pos Date’ updates the ‘Position Date’ field in the ‘Organization Information’ panel in the employee’s user profile. This field represents the date the employee entered into their latest position.</td>
</tr>
</tbody>
</table>
The DCPDS Errors worksheet identifies errors when trying to use DCPDS data to update CAS2Net. The fields that may be in error will be highlighted using a red background. The report will only contain employees where we found an error that kept the employee’s CAS2Net record from being updated. Please review the errors listed and update in DCPDS. The CAS2Net data will be updated as necessary when the biweekly script is ran again. If you need the record in CAS2Net updated sooner, you can also update the CAS2Net record to match the changes you completed in DCPDS. The table below describes the error messages you will see for errors found with an employee’s DCPDS record. Again, no updates were completed in CAS2Net for any employee with a DCPDS error. NOTE: The DCPDS Errors worksheet will also contain the ‘Unclaimed Records Report, so those will no longer be provided separately when this goes live in Production.

### New Prom Date
If the ‘New Prom Date’ is different than the ‘Old Prom Date’, then the value in the ‘New Prom Date’ updates the ‘Promotion Date’ field in the ‘Organization Information’ panel in the employee’s user profile. This field represents the date the employee was last promoted. If a new promotion date exists in DCPDS, and a Not To Exceed (NTE) for a Temporary Promotion, then the system will create the Temporary Promotion in ‘Post Cycle Activity’ with the ‘New Promotion Date’ used as the ‘Start Date’ and the Temporary Promotion NTE date as the ‘End Date’ for the Temporary Promotion.

**NOTE:** This is a new field that has not been added to CAS2Net. It will be added to CAS2Net before we roll this into Production.

### Temp Prom
This field is used to identify Temporary Promotion updates from DCPDS to CAS2Net:

- **Add** – A new temporary promotion is found in the DCDPS for the employee, and a Temporary Promotion record is added to ‘Post Cycle Activity’.
- **Update** – An update to a temporary promotion in CAS2Net is found, and the updates are applied to the Temporary Promotion record in ‘Post Cycle Activity’.
- **BLANK** – No difference is found between DCPDS and CAS2Net promotion records.

### DCPDS ERRORS

The DCPDS Errors worksheet identifies errors when trying to use DCPDS data to update CAS2Net. The fields that may be in error will be highlighted using a red background. The report will only contain employees where we found an error that kept the employee’s CAS2Net record from being updated. Please review the errors listed and update in DCPDS. The CAS2Net data will be updated as necessary when the biweekly script is ran again. If you need the record in CAS2Net updated sooner, you can also update the CAS2Net record to match the changes you completed in DCPDS. The table below describes the error messages you will see for errors found with an employee’s DCPDS record. Again, no updates were completed in CAS2Net for any employee with a DCPDS error. **NOTE:** The DCPDS Errors worksheet will also contain the ‘Unclaimed Records Report, so those will no longer be provided separately when this goes live in Production.

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-Panel not set for user</td>
<td>The employee has a record in DCDPS and in the ‘Archived/Transfer’ list in CAS2Net. The employee should be either moved into the appropriate Pay Pool, or the DCPDS record should be updated to remove the employee from AcqDemo.</td>
</tr>
<tr>
<td>Sub-Panel (TRANSFER) not in a pay pool</td>
<td>The employee has a record in DCPDS and a record in CAS2Net. However, the record in CAS2Net is assigned to an organization that is not associated with an active Pay Pool.</td>
</tr>
<tr>
<td>Sub-Panel ([Org Name]) not in a pay pool</td>
<td>The employee has a record in DCPDS and in the ‘Archived/Transfer’ list in CAS2Net. The employee should be either moved into the appropriate Pay Pool, or the DCPDS record should be updated to remove the employee from AcqDemo.</td>
</tr>
<tr>
<td>Issue</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>The employee should be moved to the appropriate organization level on the 'Organization Information' panel in the employee’s CAS2Net User Profile.</td>
<td>No user found for EDIPI [edipi]</td>
</tr>
<tr>
<td>The employee is marked as an AcqDemo employee in DCPDS, but they do NOT have a record in CAS2Net. Administrator either creates a record in CAS2Net for this employee, or change the DCPDS record to remove the employee from AcqDemo.</td>
<td>Basic Pay is below band min</td>
</tr>
<tr>
<td>The employee’s Basic Pay is below the band minimum based on the selected Career Path, Broadband Level, and Basic Pay found in DCPDS. Update the Career Path, Broadband Level, and/or Basic Pay in DCPDS.</td>
<td>Non-Retained Pay over band max</td>
</tr>
<tr>
<td>The employee’s Basic Pay is over the band max based on the selected Career Path, Broadband Level, and Basic Pay found in DCPDS. Update the Career Path, Broadband Level, Basic Pay, and/or Retained Pay flag in DCPDS.</td>
<td>Retained Pay under local band max</td>
</tr>
<tr>
<td>The employee is marked as a Retained Pay employee, but the Basic Pay is below the local band max based on the selected Career Path, Broadband Level, Basic Pay, and Locality Code in DCPDS. Update the Career Path, Broadband Level, Basic Pay, Locality Code, and/or Retained Pay flag in DCPDS.</td>
<td>Locality Code '[Locality Code]' is invalid</td>
</tr>
<tr>
<td>The employee’s locality code in DCDPS is not valid. Please fix the locality code in DCPDS.</td>
<td>Occ Series '[XXXX]' is invalid</td>
</tr>
<tr>
<td>The employee’s Occupational Series in DCPDS is not a valid option for AcqDemo. Change the Occupational Series in DCPDS to an Occupational Series that is listed in Appendix B of the AcqDemo OpGuide.</td>
<td>Career Path Code '[XX]' is invalid</td>
</tr>
<tr>
<td>The employee’s Career Path in DCPDS is not a valid option for AcqDemo. Change the Career Path in DCPDS to NH, NJ, or NK.</td>
<td>HRSO Code '[XX]' is invalid</td>
</tr>
<tr>
<td>The employee’s CCPO ID in DCPDS is not defined as an HRSO Code in CAS2Net. Change the CCPO ID in DCPDS, or send a request to add the HRSO Code in CAS2Net to <a href="mailto:AcqDemo.Contact@hci.mil">AcqDemo.Contact@hci.mil</a>.</td>
<td>No pay band in current cycle</td>
</tr>
<tr>
<td>The employee's Broadband Level does not exist in the selected Career Path. Change the Career Path and/or Broadband Level in DCPDS.</td>
<td>Unable to process temporary promotion due to other errors</td>
</tr>
<tr>
<td>The employee has a Temporary Promotion identified in their DCPDS record, but the Temporary Promotion could not be created in CAS2Net due to errors in the fields annotated by</td>
<td></td>
</tr>
</tbody>
</table>
CAS2NET ERRORS

The CAS2Net Errors worksheet identifies errors with CAS2Net data for AcqDemo employees (IsDemoEmployee = Yes). The fields that may be in error will be highlighted using a red background. The worksheet will only contain employees where we found an error with the employee’s CAS2Net record. Please review the errors listed and update in CAS2Net as needed. Some of these errors may also exist on the DCPDS Errors worksheet, so you have the option of fixing the record in DCPDS, and allowing the updates to process during the next biweekly run of the script. If you need the record in CAS2Net updated sooner, you can go ahead and update the CAS2Net record. The table below describes the error messages you will see for errors found with an employee’s CAS2Net record.

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User not processed by DCPDS import</td>
<td>The employee has an active record in CAS2Net, but they do NOT have a record in DCPDS. Ensure the EDIPI in CAS2Net and DCPDS match, and the employee’s DCPDS record has a Demo Location Code of ‘Q’.</td>
</tr>
<tr>
<td>AcqDemo Start Date missing</td>
<td>The employee is missing ‘AcqDemo Start Date’ in their CAS2Net User Profile on the ‘Organization Information’ panel. Add the ‘AcqDemo Start Date’.</td>
</tr>
<tr>
<td>Organization Start Date missing</td>
<td>The employee is missing ‘Organization Start Date’ in their CAS2Net User Profile on the ‘Organization Information’ panel. Add the ‘Organization Start Date’.</td>
</tr>
<tr>
<td>Career Path is missing or invalid</td>
<td>The employee is missing ‘Career Path’ in their CAS2Net User Profile on the ‘Organization Information’ panel or it is invalid. Update the ‘Career Path’ by using the dropdown.</td>
</tr>
<tr>
<td>Broadband Level is missing or invalid</td>
<td>The employee is missing 'Broadband Level' in their CAS2Net User Profile on the 'Organization Information' panel or it is invalid. Update the 'Broadband Level' using the dropdown.</td>
</tr>
<tr>
<td>Occupational Series is missing or invalid</td>
<td>The employee is missing 'Occupational Series' in their CAS2Net User Profile on the 'Organization Information' panel or is not a valid option based on the selected Career Path. Update the 'Occupational Series' to a valid Occupational Series that is listed in Appendix B of the AcqDemo OpGuide.</td>
</tr>
<tr>
<td>Issue Description</td>
<td>Resolution</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sub-Panel not set for user</td>
<td>The employee has an active record, but is not assigned to an organization. Find the employee in the 'Archived/Transfer' list, and move the employee to the correct 'Organization Level'.</td>
</tr>
<tr>
<td>Sub-Panel [Name (Pay Pool Code)] not in an active pay pool</td>
<td>The employee is assigned to an 'Organization Level' that is not associated with a Pay Pool or the associated Pay Pool is inactive. Update the 'Organization Level' in their CAS2Net User Profile on the 'Organization Information' panel using the dropdown.</td>
</tr>
<tr>
<td>Sub-Panel [Code (CAS2NetID)] is inactive</td>
<td>The employee is assigned to an 'Organization Level' that is inactive in their CAS2Net User Profile on the 'Organization Information' panel. Update the 'Organization Level' using the dropdown.</td>
</tr>
<tr>
<td>HRSO is missing or invalid</td>
<td>The employee is missing HRSO Code in their CAS2Net User Profile on the 'Organization Information' panel or is not a valid option. Change the HRSO Code to a valid code defined in CAS2Net. Please send a request to add the HRSO Code in CAS2Net to <a href="mailto:AcqDemo.Contact@hci.mil">AcqDemo.Contact@hci.mil</a> if you can't find the appropriate code in the HRSO Code dropdown.</td>
</tr>
<tr>
<td>Supervisor 1 is not assigned</td>
<td>The employee does NOT have a 'Supervisor 1' assigned in their CAS2Net User Profile on the 'Organization Information' panel. Add a 'Supervisor 1' by using the dropdown.</td>
</tr>
<tr>
<td>Basic Pay Missing</td>
<td>The employee is missing Basic Pay in their CAS2Net User Profile on the 'Salary Information' panel. Update the user profile to include Basic Pay.</td>
</tr>
<tr>
<td>Basic Pay is below band min</td>
<td>The employee’s Basic Pay is below the band minimum based on the selected Career Path, Broadband Level, and Basic Pay found in CAS2Net. Update the Career Path, Broadband Level, and/or Basic Pay in CAS2Net.</td>
</tr>
<tr>
<td>Non-Retained Pay over band max</td>
<td>The employee’s Basic Pay is over the band max based on the selected Career Path, Broadband Level, and Basic Pay found in CAS2Net. Update the Career Path, Broadband Level, Basic Pay, and/or Retained Pay flag in CAS2Net.</td>
</tr>
<tr>
<td>Retained Pay under local band max</td>
<td>The employee is marked as a Retained Pay employee, but the Basic Pay is below the local band max based on the selected Career Path, Broadband Level, Basic Pay, and Locality Code in CAS2Net. Update the Career Path, Broadband Level, Basic Pay, Locality Code, and/or Retained Pay flag in CAS2Net.</td>
</tr>
<tr>
<td>Locality is missing or invalid</td>
<td>The employee is missing 'Locality' in their CAS2Net User Profile on the 'Salary Information' panel or it is an invalid option. Update the user profile to select a valid option from the 'Locality' dropdown.</td>
</tr>
</tbody>
</table>
Unable to determine salary band

The employee is missing either the ‘Career Path’ or ‘Broadband Level’ in their CAS2Net User Profile on the ‘Organization Information’ panel. Update the user profile by selecting a valid ‘Career Path’ and/or ‘Broadband Level’ from the dropdowns.

Pay band on temporary promotion does not match user profile

The employee has a ‘Temporary Promotion’ in ‘Post Cycle Activity’ that does not match the CAS2Net User Profile. Update the ‘Post Cycle Activity’ Temporary Promotion or the User Profile to match.

**CAS2NET DCPDS WARNINGS**

The DCPDS Warnings worksheet identifies warnings when updating CAS2Net with DCPDS data. The fields with a warning will be highlighted using a yellow background. It is NOT necessary to update DCPDS or CAS2Net, but is provided just to document the difference between the two systems. At the present time, there is only one type of warning, but more will be added if necessary.

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Pool Code ['XXXX'] is different from CAS2Net.</td>
<td>The ‘Demo Pay Code’ in DCPDS is different than the Pay Pool the employee is assigned to in CAS2Net. Update the ‘Demo Pay Code’ in DCPDS to match CAS2Net, or transfer the employee to the correct Pay Pool in CAS2Net.</td>
</tr>
</tbody>
</table>