

## CAS2Net and CCAS Open Forum

Thursday 6 March 2025 1:00 PM Eastern Time

Topic: Assign Mandatory Objectives, Midpoint Assessment/Review, Additional Feedback, Closeout Assessment

### **Housekeeping Items**

- Presentations are sent in advance through the CAS2Net Pay Pool Notices
- Posted to What's New 2
- Available in User Notifications 3
- Enter your email address in chat 4. if you did not receive it



CAS2Net 2.0 Your Session will expire in 14:25 minutes

2023-08-03 LEE, JERRY

- 5. Please remember to "Mute" your phone to prevent any background noise and additional feedback.
- All Open Forum Sessions will be recorded 6.
- 7. Each recorded session will be posted to the AcqDemo website (including presentation slides) at https://acqdemo.hci.mil/training.html#cas2netOpenForums

Aca

C ERIN

Open Forum 2023 August CCA



### **Assigning Mandatory Objectives**



### **CAS2Net Mandatory Objectives**

- Mandatory Objectives are additional objectives in CAS2Net based on your organization's business rules.
  - Assigned Mandatory Objectives are visible in the employee's Contribution Plan in the Contribution Planning Panel
- To enable Mandatory Objectives for your organizations, go to: Administrator > Organization Management > Organization Details > Use Mandatory Objectives > Select Yes (Yes/No toggle)
  - Enabling allows administrators to create Mandatory Objectives and allows administrators and supervisors to assign them
- Administrators are responsible for adding, modifying, and deleting Mandatory Objectives.
  - Mandatory Objectives aren't visible to supervisors to assign unless they have been created by the administrator

Organization Details under A	cqDemo - AcqDemo-PMO	Show UIC/PAS ()	Refresh Contribution Plans 📀 Refre	esh Managers for Annuals 🛛 Move 🕘 Delete 🕘 🗖
CAS2Net Id	Is Pay Pool Start Date No Yes 09-30-20			
Pay Pool Id 9009	Name 9009 Pay Pool		Description 9009 Pay Pool	
First Year No Yes	Use Mandatory Ob No Yes	ectives	Contribution Plan by Factors	Require Employee Initiate and Submit
Require Approved Plan	Require Approved	Midpoint	Supervisor Enters Numeric Scores	Require Supervisor 2 Approval
Time Off Award	Can Pro-Rate CA No Yes		Can Set Cash Differential	Control Point By OCS
Manager Can Access CMS				

### **Add Mandatory Objectives**

- To add a new Mandatory Objective, go to:
  - Administrator
  - Organization Management
  - Mandatory Objectives
  - Click Add Mandatory Objective 📀 🗖
  - Use the *Description* field to enter the title of the objective
    - Use the Objective Text to enter the in-depth description of the objective
  - Click Save to process the action



Aca



### **Delete Mandatory Objectives**

- To delete a Mandatory Objective, go to: Administrator > Organization Management > Mandatory Objectives
  - Click the blue trash can button next to the objective you want to delete
  - Click **Delete** in the *Delete Mandatory Objective* dialogue box to process the action

M	andatory Objecti	/es		=
	Mandatory Obje	ctives for Current Organization		Add Mandatory Objective 🗢 🗖
	Show 25	✓ entries	Search:	
	Delete	Description		1±
		AWF Members Mandatory Objective		
		Provide Protection for Whistleblowers		
		Supervisor of AWF Members Mandatory Object	ive	
	Delete N	landatory Objective	;	revious 1 Next
	Are	you sure you want to delete this	mandatory objective?	
			Cancel Delete	



### **Assign/Remove Mandatory Objectives**

- As an administrator, to assign Mandatory Objectives to a user or multiple users, go to: Administrator > Organization Management > Mandatory Objectives
  - Select the desired objective from the Mandatory Objectives for Current Organization table
  - From the Select column in the Users in Organization Not Associated to Objective panel, select the checkboxes for user(s) you want to assign the objective too
  - Selected user(s) will then populate in the Users Associated to Objective panel
  - Click Save to process the action
- To remove Mandatory Objectives from a user or multiple users, go to: Administrator > Organization Management > Mandatory Objectives
  - Select the desired objective from the *Mandatory Objectives for Current Organization* table
  - From the Select column in the Users Associated to Objective panel, select the checkboxes for the user(s) you want to remove the objective from
  - Selected users will then populate in the Users in Organization Not Associated to Objective panel
  - Click Save to process the action

### Acq Demo

### **Assign Mandatory Objectives**

- CAS2Net allows both the administrator and supervisor to pick and choose which Mandatory Objectives to assign to their employees.
- Supervisors will work with administrators to add Mandatory Objectives to CAS2Net as well as assign the Mandatory Objectives to the employees.
- Modifications to Mandatory Objectives will have to be discussed with administrators and verified in the CAS2Net.
- A best practice is to modify/add/assign Mandatory Objectives at the beginning of the CCAS Cycle.





### **Refresh User Contribution Plan**

- Select Refresh Contribution Plan to update the employee's Contribution Plan with updates made to Mandatory Objectives.
  - Users will receive an email notification that their Contribution Plan has been updated by the Administrator

General Information				•			
		Fiscal Year: 2024					
Supervisor Level 1: MURRAY, ERIN	Supervisor Level 2: LEE, JERRY	2 C	Sub-Panel Manager: ARTER, BEYONCE GK	Pay Pool Manager: MANAGER, PAY POOL			
Broadband Level: III	Occupational Series: 0186 - SOCIAL SERVICES AID AND ASSIS	TANCE NK -	Career Path: Administrative S <mark>u</mark> pport	Expected OCS and Range: 53 - <b>56</b> - 60			
Contribution Planning				Refresh Contribution Plan 📋 🗖			
		Effective Date: 09-29-2023					
	The effective da This may be because the employees	ate is prior to the beginning of fis was Presumptive Status 1 - Due	scal year. to Time for the previous year.				
Mandatory Objectives: TEST MANDATORY OBJECTIVE : AWF SUPERVISORS. Under the authority, direction a. Create and maintain a high level of excellence b	, and control of the acquisition senior leadership, th 19 providing AWF members training and developmer	e AWF supervisors: ntal opportunities to meet the re	quirements of their positions within	allowable timeframes.			

### **Refresh All Contribution Plans**



• Capability to update all contribution plans to reflect current organization and user settings.

Organization			•
Organization Hierarchy			+
Organization Details under AcqDemo - AcqDemo-PMO	Show UIC/PAS 🜒 Refresh Contribution Plans 🕀	Refresh Managers for Annuals 📀 Move 📀 D	elete 🔶 😑

CAS2Net 2.0	ſ	This system is only designed for processing up to CUI and unauthorized disclosure of information Refresh Contribution Plans	SUPER USER 🕶
Administrator	Edi	Are you sure want to update all contribution plans in the current plan year to reflect current organization and user settings?	
Organization Management     Pay Pool Notices	Orga	No Yes	-
Archived Appraisals			

Acq CAS2Net		This system is only designed for processing up to CUI and unauthorized disclosure of information Refresh Contribution Plans	SUPER USER 🗸
Your Session will expire in 14	4:57 minutes.		
	-	The contribution plans in this organization, if applicable, have	
	Edi	been renesiled.	
	gement Org	Ok	



### **Midpoint Assessment/Review**

### Pay Pool Midpoint Target Date



- In accordance with local business rules, administrators may establish a Midpoint Target Date for the organization/pay pool and for individual employees assigned, reassigned or promoted to an AcqDemo position with an AcqDemo Start Date after 1 October.
- To Set a pay pool Midpoint Target Date, go to: Administrator > Organization Management
   > Organization Details
  - Options include (1) Employee Midpoint Target Date and (2) Supervisor Midpoint Target Date



• All target dates will be cleared with the end of year CAS2Net script run on 30 September.



### **Individual Midpoint Target Date**

- To Set Midpoint Target Date for an individual employee, go to: Administrator > User Management > Assigned
  - From the Assigned Employees panel select the desired employee
  - In the Organization Information panel options include (1) Employee Midpoint Target Date and (2) Supervisor Midpoint Target Date
- If set, the individual employee Midpoint Target Date will supersede the organization/pay pool Midpoint Target Date.
- Note: the set Employee and Supervisor Midpoint Target Date(s) will be visible to ۲ the employee when they access the Edit Profile page

User Profile - CAR	TER, BEYONCE GK	(ID #26060	)1)		
General User Information					Impersonate User 🜖 🛨
Organization Information			Transfer User 🚺 Supervised List 🚺 U	Jser Change History 🕕 Superviso	r 1 History 1 Organization History 1
DCPDS Position Start Date	DCPDS Last Promoted Date	UIC/PAS	Sub-Agency	DCPDS Opt-Out No Yes	Is BUE No Yes
AcqDemo Start Date 09-29-20	023	Start Date in Orgar	nization	Position Start Date	<b>=</b>
Employee Contribution Target D	ate Supervisor Co	ntribution Target Date	Employee Midpoint Targe	st Date	visor Midpoint Target Date 2 04-18-2025



### **Midpoint Target Dates**

- If a Midpoint Target Date is established, it is critical employees and supervisors are informed of the date and the subsequent CAS2Net generated emails.
- Based on the set Employee and Supervisor Midpoint Target Date(s), employees and supervisors will receive a CAS2Net generated email notifying them that their Midpoint Assessment is due and indicates how many days they have to complete the Assessment.

CAS2Net-generated Email for Midpoint Target Date								
	2 Weeks Before Midpoint Target Date		1 Week Before Midpoint Target Date		On Midpoint Target Date		Every Other Day After the Midpoint Target Date	
Midpoint Status	Employee	Supervisor	Employee	Supervisor	Employee	Supervisor	Employee	Supervisor
Not Started	Email	Email	Email	Email	Email	Email	Email	Email
Draft	Email	Email	Email	Email	Email	Email	Email	Email
Submitted to Supervisor 1	NA	Email	NA	Email	NA	Email	NA	Email
Submitted to Supervisor 2 (if applicable)	NA	Email	NA	Email	NA	Email	NA	Email



Please take the appropriate action. If this has already been addressed, please disregard this message.



### **Midpoint Target Date: Reports**

- Administrators can pull the Appraisal Status Report in the Fiscal Year Based Reports panel to access Midpoint Target Dates.
  - The Midpoint Target Date can also be accessed in the Employee Data Report in the *Current Settings Reports* panel

Select Appraisal Status Options				×			
Select Fields to Include 🗀 Check All							
Employee Id	EDII	PI					
🖾 Employee Name	🗌 Ema	ail					
Office Symbol	🗌 Car	eer Path					
Broadband Level		upational Series					
Supervisor 1	🗆 Sup	ervisor 1 Email					
Supervisor 2	🗌 Sup	ervisor 2 Email					
Functional Reviewer	🗌 Fun	ctional Reviewer Er	nail				
Sub-Panel	🗌 Sub	-Panel Manager					
Pay Pool	Pay Pool Manager						
Component Level	🗌 Acq	Demo Start Date					
Organization Start Date	🗌 Pos	ition Start Date					
Presumptive Status	🗌 Con	tribution Plan Statu	JS				
Contribution Plan Date Communicated	🗌 Mid	point Status					
Midpoint Employee Factor Char Counts	🗌 Mid	point Supervisor Fa	actor Charlounts				
Midpoint Date Communicated	🗹 Mid	point Emp Target D	ate 1				
Midpoint Sup Target Date							
Annual Employee Factor Char Counts		A	В	C		F	G
Annual Date Communicated						Midua int Enon	Midne int Cun
🗌 Annual Emp Target Date						Mildpoint Emp	Midpoint Sup
Closeout Status	1	Pay Pool	Last Name	First Name		Target Date	Target Date
Grievances	2	9009	BUNTING	INDIGO		3/14/2025	4/18/2025
🗌 Mandatory Obj	3	9009	CARDINAL	NORTHERN		<b>3/14/2025</b>	<b>4/18/2025</b>
		0000		DEVONOE		1 0/01/0005	2 4/40/0005
	4	9009	CARIER	REJONCE		3/21/2025	4/18/2025

9009 EAGLE

CREASTED

3/14/2025

4/18/2025

### **Skip Midpoint**

۲



- Only Midpoint Assessments in the "Draft" status can be skipped
- To skip a Midpoint Assessment, go to: Administrator > CCAS Management > Midpoint Assessments
  - Select the desired employee from the *Employee Midpoint Assessments Administrator* panel
  - Click Skip Midpoint
  - In the Skip Midpoint Assessment dialog box select the Skip Reason
  - Click Save to process the action
  - Status will update from "Draft" to "Not Required"

		plites This system is only designed for processing lin for the and	unauthorized disclosure of into
Contribution Planning		Skip Midpoint Assessment	×
		Skip Reason	
Job Achievement and/or Innovation	Communication ar	Select Option	*
		Employee is Transferring	
s record is read-only because administra	tors do not have edit p	Other	
		Supervisor is Transferring	
52Net 2.0 - Powered by ALTESS	The information	Use Closeout	
			<u> </u>

DUNTING INDIGO (ID //242050



Aca

### **Reverse a Skipped Midpoint**

- To reverse a skipped Midpoint Assessment, go to: Administrator > CCAS Management > Midpoint Assessments
  - Select the desired employee from the *Employee Midpoint Assessments Administrator* panel
  - Click Return for Changes
  - In the *Return Midpoint Assessment* dialog box enter in justification
  - Click Yes to process the action
  - Stats will update from "Not Required" to "Returned by Supervisor 1"

	Return Midpoint Assessment ×
	Are you sure you want to return this midpoint assessment to the employee? If so, this will clear the method of communication and date.
Midpoint Assessment BUNTING, INDIGO (ID #242859	Justification
General Information	
Contribution Planning	No Yes
Job Achievement and/or Innovation Communication and/or Teamwork Mission Su	ipport
Supervisor 1 Approval	
Factor Description Cancel Return for Changes	Return to Supervisor 1

Acq



### **Additional Feedback**



### **Additional Feedback**

- Additional Feedback is an optional feature that lets supervisors provide supplemental commentary to address employee contribution and/performance throughout the rating cycle.
  - 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 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 releasing to the employee
  - Only the supervisor that initiated Additional Feedback can view and release unreleased feedback
  - Supervisors can create multiple instances of Additional Feedback using the Add Feedback feature option
- In the event there is a Trusted Agent assigned to a supervisor, that user will have access to view and release unreleased additional feedback with the associated supervisor 1 and employee(s).



- A Closeout Assessment is completed when an employee is changing positions and/or supervisor.
  - This enables the employee and supervisor to document contributions and performance for partial year position assignments
  - Does not include any scores
- A Closeout Assessment is also completed when a supervisor is leaving the organization before the end of the rating cycle.
  - This allows the losing supervisor to provide information for consideration by the new supervisor to write the employees' annual assessment
  - Does not include any scores
- A Closeout Assessment should <u>not</u> be used in lieu of an Annual Assessment.
  - The departing supervisor can, however, prepare a Midpoint or an Annual Assessment in lieu of a closeout if departing during the time period designated for Midpoint or Annual Assessments by the organization
- For policy details about closeout appraisals refer to the AcqDemo Operating Guide and your local business rules.

Aca



- In CAS2Net, the supervisor must first initiate a Closeout Assessment for the employee to have it in their CAS2Net menu selection. Supervisors have the option to:
  - (1) Initiate a Closeout Assessment for a Single employee
  - (2) Initiate a Closeout Assessment for all employees
- Once an option is selected the supervisor will be prompted to select the **Reason** and **End Date** for the Closeout Assessment.
- Once initiated, the status of the Closeout Assessment for the selected employee(s) will update from "Not Started" to "Draft"

Add Closeout	I unauthorized disclosure of information	is a violation of the law.
User	CARTER, BEYONCE GK	v
Reason	Select Reason	
End Date	Change in Position	
	Change in Supervisor	
	Other	Cancel Add

- Administrators can delete a Closeout Assessment if needed.
- To delete a Closeout Assessment, go to: Administrator > Closeout Assessment
  - Select the desired employee from the list
  - Click Delete
  - Click Yes to confirm action
  - Note: Status will update from "Draft" to "Not Started"

드 Home            도 Home         -           춥 System Owner         -	Closeout Assessment for BEYONCE CARTER (Dra	ft)							
🛓 Regional Pay Manager 👻	General Information	Delete Closeout Assessment							
🍰 Administrate									
<ul> <li>Organization Management</li> </ul>	Objectives								
Pay Pool Notices		Are you sure you want to Delete this Closeout Assessment? This							
<ul> <li>Archived Appraisals</li> </ul>	Job Achievement and/or Innovation Communication and/or Teamwork Mission	action cannot be undone.							
Reports		5							
Trusted Agent	Factor Description								
Contribution Plans	Employee Assessment	No Yes							
n Assessments									
Annual Assessments	Supervisor 1 Assessment								
ACDP Assessments									
Closeout Assessments	This record is read-only because administrators do not have edit permission.	Delete Cancel							



Acq

### **Closeout Requirement for Transfers**

- An employee should have a closeout assessment completed by their supervisor before the employee is transferred.
- If a closeout assessment has been initiated and is pending supervisor action, a dialog box will populate notifying the administrator the transfer cannot be processed until the pending closeout assessment is released.
  - Contact the supervisor 1 to ensure the closeout assessment is completed in order to proceed with the employee transfer



Aca

### **Closeout Requirement for Transfers**

- If neither the employee or supervisor 1 have initiated a closeout, a Transfer User dialog box will open allowing the administrator to submit the supervisor's closeout narrative.
  - You can either (1) discuss the closeout narrative with the supervisor and enter the narrative yourself using the dialog box or (2) contact the supervisor to complete it via the Closeout Assessment module



Aca



### **2025 End of Cycle Timeline**



Last FY2025 Pay Period – 24 Sep 2025 to 4 Oct 2025 Tuesday 30 Sep 2025 – Last day of 2025 CCAS rating period

#### Wednesday 1 Oct 2025

- CAS2Net activates end-of-cycle modules: Appraisal Status, Offline Interface and Previous Cycle Data, Sub-Panel Meeting, CMS Online, Macro-Free CMS/Sub-Panel Interface
- Pay Pool Notices with 2025 Sub-Panel Meeting Spreadsheet, 2025 CMS, and 2025 Pay Pool Analysis Tool

#### 19 Nov 2025 – start Not Final Report / Data Complete Reports

#### Friday 12 Dec 2025 – Initial Upload

- FY25 Award Funding Guidance
- 2025 GPI and Locality Rates (NLT 31 Dec 2024)

#### Wednesday 7 Jan 2026– Final Upload

2026 First Full Pay Period in January – 11 to 24 January 2026

NLT 16 Jan 2026 – PMO marks pay pools Completed

Acq

26 27 28 29 30

### **Planning for FY26 End of Cycle**

I	Month	Pay Period	S	Μ	Т	W	Т	F	S	Month
							1	2	3	
	ост	20	4	5	6	7	8	9	10	
			11	12	13	14	15	16	17	
		21	18	19	20	21	22	23	24	
		~ .	25	26	27	28	29	30	31	
l			25	26	27	28	29	30	31	

th	Period	S	IN		VV		F	S
	202	1	2	3	4	5	6	7
V	22	8	9	10	11	12	13	14
	22	15	16	17	18	19	20	21
	23	22	23	24	25	26	27	28
		29	30					
	•							

Month	Pay Period	S	M	Т	W	Т	F	S		Month	Pay Period	S	
	24			1	2	3	4	5			26		
DEC		6	7	8	9	10	11	12			01	3	
	25	13	14	15	16	17	<u>18</u>	19		JAN	•	10	1
	20	20	21	22	23	24	25	26			02	17	1
	26	27	28	29	30	31					02	24	2
												31	
									Ι.		-		

- Wednesday 1 Oct 2026
  - CAS2Net activates end-of-cycle modules: Appraisal Status, Offline Interface and Previous Cycle Data, Sub-Panel Meeting, CMS Online, Macro-Free Sub-Panel Meeting, Macro-Free CMS
  - Pay Pool Notices with 2026 Sub-Panel Meeting Spreadsheet, 2026
     CMS, and 2026 Pay Pool Analysis Tool
- Thursday 19 Nov 2026 start Not Final Reports / Data Complete Reports
- Friday 4 Dec 2026 Initial Upload
- Wednesday 23 Dec 2026– Final Upload
- 3 to 16 January 2027 First Full Pay Period in January
- ~8 Jan 2027 at 12:00 pm ET PMO marks pay pools Completed
- ~10 Jan 2027 PMO post pay transactions to regional pay offices

### **2025 Open Forum Schedule**



Aca



# Open Forum Questions?

AcqDemo.Contact@dau.edu

Jennifer.Wilson@dau.edu

Jerry.lee@dau.edu