

CAS2Net and CCAS Open Forum

Thursday
7 March 2024
1:00 PM Eastern Time

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

[TEAMS Meeting Link](#)

[Meeting ID: 231 024 528 524](#)

[Passcode: SMZdLr](#)

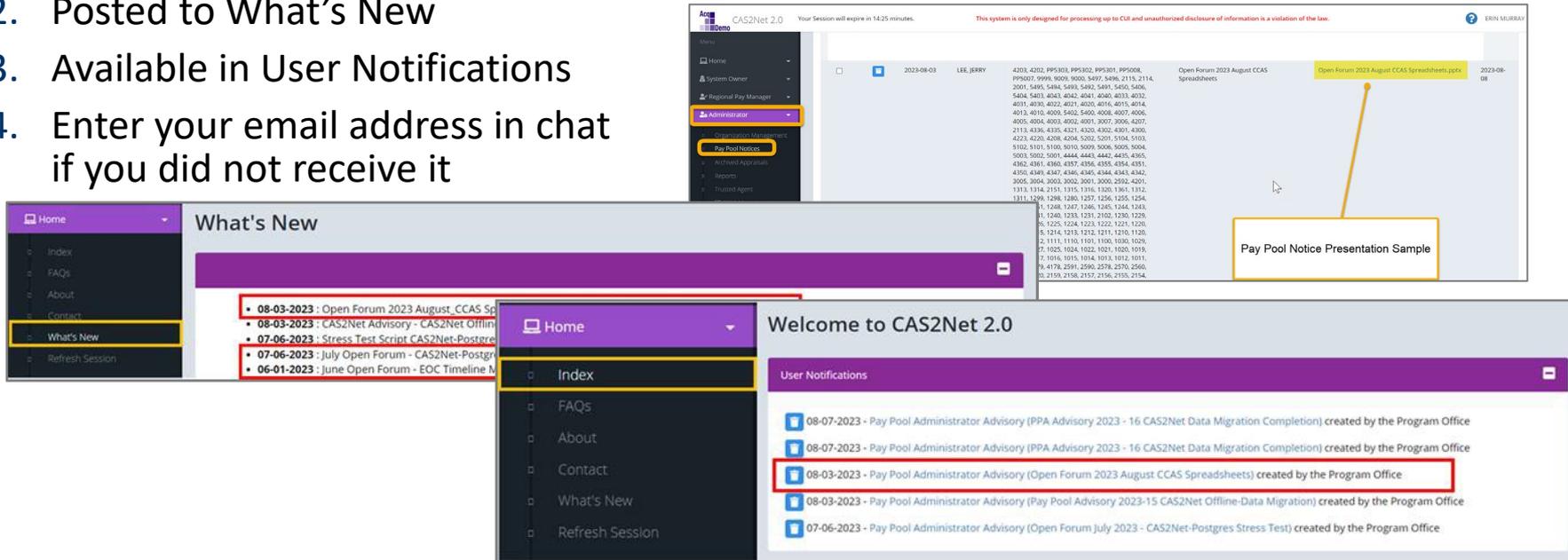
[Meeting Call in Information](#)

[+1 571-403-9146](#)

[Phone Conference ID: 989 870 18#](#)

Housekeeping Items

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

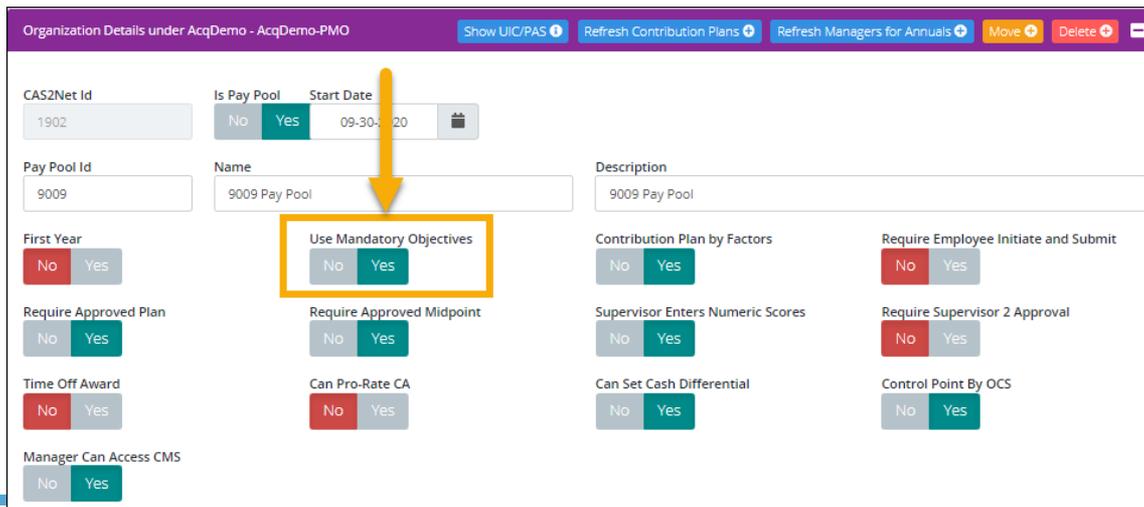


5. Please remember to “Mute” your phone to prevent any background noise and additional feedback.
6. All Open Forum Sessions will be recorded
7. Each recorded session will be posted to the AcqDemo website (including presentation slides) at <https://acqdemo.hci.mil/training.html#cas2netOpenForums>

Assigning Mandatory Objectives

CAS2Net Mandatory Objectives

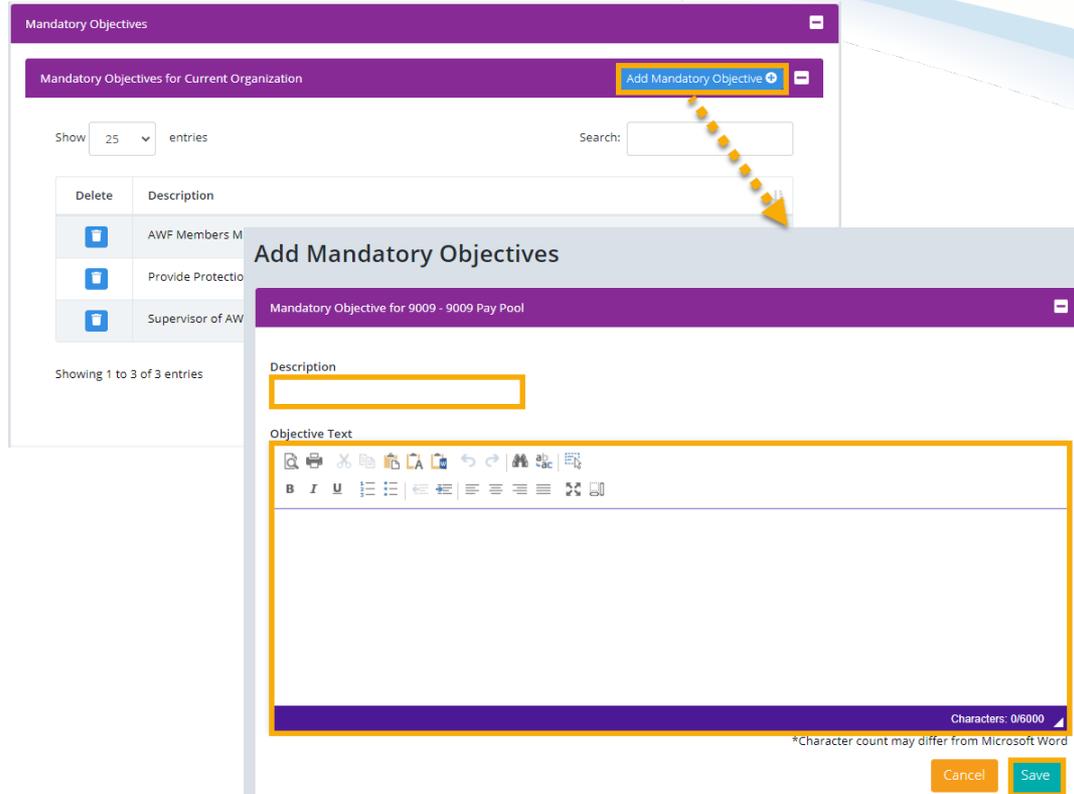
- Mandatory Objectives are additional objectives in CAS2Net based on your organization's business rules.
 - Assigned Mandatory Objectives are visible in the employee's Contribution Plan in the *Contribution Planning Panel*
- To enable Mandatory Objectives for your organizations, go to: Administrator > 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



The screenshot displays the 'Organization Details' page for 'AcqDemo - AcqDemo-PMO'. The page features a purple header with navigation links: 'Show UIC/PAS', 'Refresh Contribution Plans', 'Refresh Managers for Annuals', 'Move', 'Delete', and a menu icon. Below the header, the 'CAS2Net Id' is 1902, 'Is Pay Pool' is 'No' (grey) and 'Yes' (green), and 'Start Date' is 09-30-2020. The 'Pay Pool Id' is 9009, 'Name' is '9009 Pay Pool', and 'Description' is '9009 Pay Pool'. A yellow arrow points to the 'Use Mandatory Objectives' toggle, which is currently set to 'Yes' (green). Other toggles include 'First Year' (No/Yes), 'Require Approved Plan' (No/Yes), 'Time Off Award' (No/Yes), 'Manager Can Access CMS' (No/Yes), 'Contribution Plan by Factors' (No/Yes), 'Require Employee Initiate and Submit' (No/Yes), 'Require Approved Midpoint' (No/Yes), 'Supervisor Enters Numeric Scores' (No/Yes), 'Require Supervisor 2 Approval' (No/Yes), 'Can Pro-Rate CA' (No/Yes), 'Can Set Cash Differential' (No/Yes), and 'Control Point By OCS' (No/Yes).

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



Mandatory Objectives

Mandatory Objectives for Current Organization **Add Mandatory Objective**

Show 25 entries Search:

Delete	Description
	AWF Members M
	Provide Protectio
	Supervisor of AW

Showing 1 to 3 of 3 entries

Add Mandatory Objectives

Mandatory Objective for 9009 - 9009 Pay Pool

Description

Objective Text

Characters: 0/6000

*Character count may differ from Microsoft Word

Cancel Save

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

The screenshot displays the 'Mandatory Objectives' management interface. At the top, there is a purple header bar with the title 'Mandatory Objectives' and a close button. Below this is a sub-header 'Mandatory Objectives for Current Organization' with an 'Add Mandatory Objective' button. The main area shows a table with columns 'Delete' and 'Description'. The table contains three entries: 'AWF Members Mandatory Objective', 'Provide Protection for Whistleblowers', and 'Supervisor of AWF Members Mandatory Objective'. The first entry's delete button (a blue trash can icon) is highlighted with a yellow dashed arrow. A dialog box titled 'Delete Mandatory Objective' is open in the foreground, asking 'Are you sure you want to delete this mandatory objective?' with 'Cancel' and 'Delete' buttons.

Delete	Description
	AWF Members Mandatory Objective
	Provide Protection for Whistleblowers
	Supervisor of AWF Members Mandatory Objective

Delete Mandatory Objective

Are you sure you want to delete this mandatory objective?

Cancel Delete

Assign 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

The screenshot displays the application interface with several key components:

- Left Navigation Menu:** Shows the 'Administrator' role selected (1) and 'Organization Management' (2).
- Assigned Organization Panel:** Lists '9009 - 9009 Pay Pool' and 'AcqDemo - AcqDemo-PMO'. It shows 'Showing 1 to 5 of 5 entries'.
- Users Associated to Objective Panel:** A table with columns: Select, Name, Is Supervisor (1 or 2), Is Functional Reviewer, Acquisition Career Field, Occupational Series, Certification Level Complete, Supervisor 1, and Supervisor 2. Three users are listed with their 'Select' checkboxes checked:

Select	Name	Is Supervisor (1 or 2)	Is Functional Reviewer	Acquisition Career Field	Occupational Series	Certification Level Complete	Supervisor 1	Supervisor 2
<input checked="" type="checkbox"/>	CARTER, BEYONCE GK	No	No		0186 - SOCIAL SERVICES AID AND ASSISTANCE	4	MURRAY, ERIN	LEE, JERRY
<input checked="" type="checkbox"/>	MACAW, HARLEQUIN	No	No		0303 - MISCELLANEOUS CLERK AND ASSISTANT		ROBIN, AMERICAN	
<input checked="" type="checkbox"/>	PLOVER, SNOWY	No	No		0318 - SECRETARY		MANAGER, PAY POOL	
- Mandatory Objectives for Current Organization Panel:** Shows a table with columns: Delete and Description. One objective is listed:

Delete	Description
	Listen (4)
- Buttons:** 'Cancel' and 'Save' buttons are visible in the top right, with a red arrow pointing to the 'Save' button.
- Character Count:** 'Characters: 20/6000' is displayed in the top right corner.

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.

Users Associated to Objective

Show entries Search:

Select		Is Supervisor	Is Functional	Acquisition Career Field	Occupational Series	Certification Level Complete	Supervisor 1	Supervisor 2
<input checked="" type="checkbox"/>	BUNTING, INDIGO	No	No		0017 - EXPLOSIVES SAFETY	4	ROBIN, AMERICAN	
<input checked="" type="checkbox"/>	DOVE, MOURNING	No	No		0301 - MISCELLANEOUS ADMINISTRATION AND PROGRAM	4	SUPERVISOR, ACDP	

Showing 1 to 2 of 2 entries Previous **1** Next

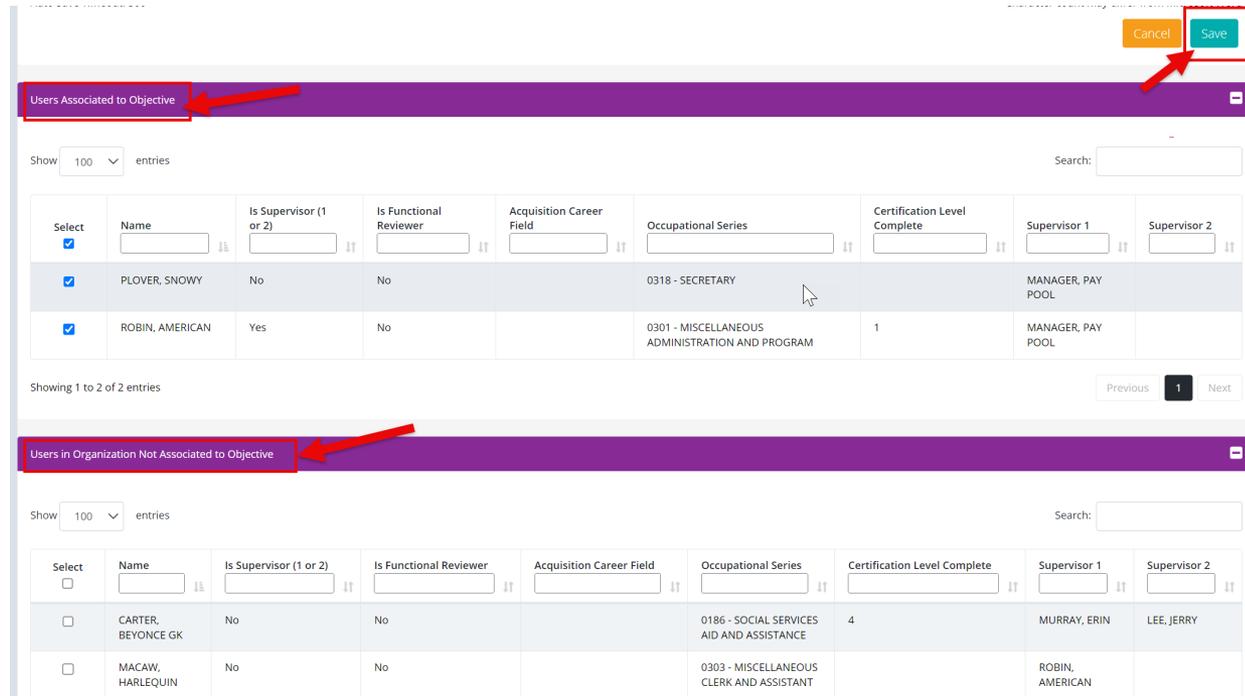
Users in Organization Not Associated to Objective

Show entries Search:

Select	Name	Is Supervisor (1 or 2)	Is Functional Reviewer	Acquisition Career Field	Occupational Series	Certification Level Complete	Supervisor 1	Supervisor 2
<input type="checkbox"/>	CARDINAL, NORTHERN	No	No		0332 - COMPUTER OPERATION	4	USER, SUPER	
<input type="checkbox"/>	DRAGOON, PIGEON	No	No		1152 - PRODUCTION CONTROL	4	WOODPECKER, DEWEY	
<input type="checkbox"/>	EAGLE, CRESTED	No	No		0340 - PROGRAM MANAGEMENT	4	SUPERVISOR, ACDP	

Remove Mandatory Objectives

- 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



Cancel Save

Users Associated to Objective

Show 100 entries Search:

Select	Name	Is Supervisor (1 or 2)	Is Functional Reviewer	Acquisition Career Field	Occupational Series	Certification Level Complete	Supervisor 1	Supervisor 2
<input checked="" type="checkbox"/>	PLOVER, SNOWY	No	No		0318 - SECRETARY		MANAGER, PAY POOL	
<input checked="" type="checkbox"/>	ROBIN, AMERICAN	Yes	No		0301 - MISCELLANEOUS ADMINISTRATION AND PROGRAM	1	MANAGER, PAY POOL	

Showing 1 to 2 of 2 entries Previous 1 Next

Users in Organization Not Associated to Objective

Show 100 entries Search:

Select	Name	Is Supervisor (1 or 2)	Is Functional Reviewer	Acquisition Career Field	Occupational Series	Certification Level Complete	Supervisor 1	Supervisor 2
<input type="checkbox"/>	CARTER, BEYONCE GK	No	No		0186 - SOCIAL SERVICES AID AND ASSISTANCE	4	MURRAY, ERIN	LEE, JERRY
<input type="checkbox"/>	MACAW, HARLEQUIN	No	No		0303 - MISCELLANEOUS CLERK AND ASSISTANT		ROBIN, AMERICAN	

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

Contribution Plan for BEYONCE CARTER (Approved)

General Information

Fiscal Year: 2024

Supervisor Level 1: MURRAY, ERIN	Supervisor Level 2: LEE, JERRY	Sub-Panel Manager: CARTER, BEYONCE GK	Pay Pool Manager: MANAGER, PAY POOL
Broadband Level: III	Occupational Series: 0186 - SOCIAL SERVICES AID AND ASSISTANCE	Career Path: NK - Administrative Support	Expected OCS and Range: 53 - 56 - 60

Contribution Planning

Effective Date: 09-29-2023

The effective date is prior to the beginning of fiscal year.
This may be because the employees was Presumptive Status 1 - Due to Time for the previous year.

Mandatory Objectives:

TEST MANDATORY OBJECTIVE :

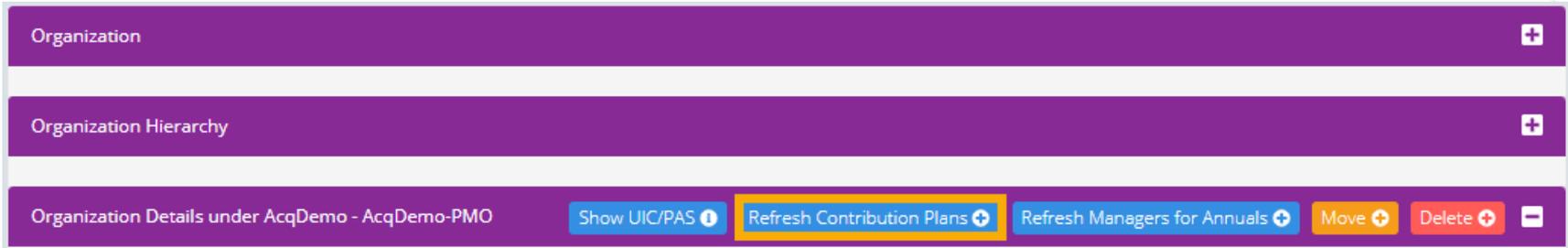
AWF SUPERVISORS. Under the authority, direction, and control of the acquisition senior leadership, the AWF supervisors:

a. Create and maintain a high level of excellence by providing AWF members training and developmental opportunities to meet the requirements of their positions within allowable timeframes.

Refresh Contribution Plan

Refresh All Contribution Plans

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

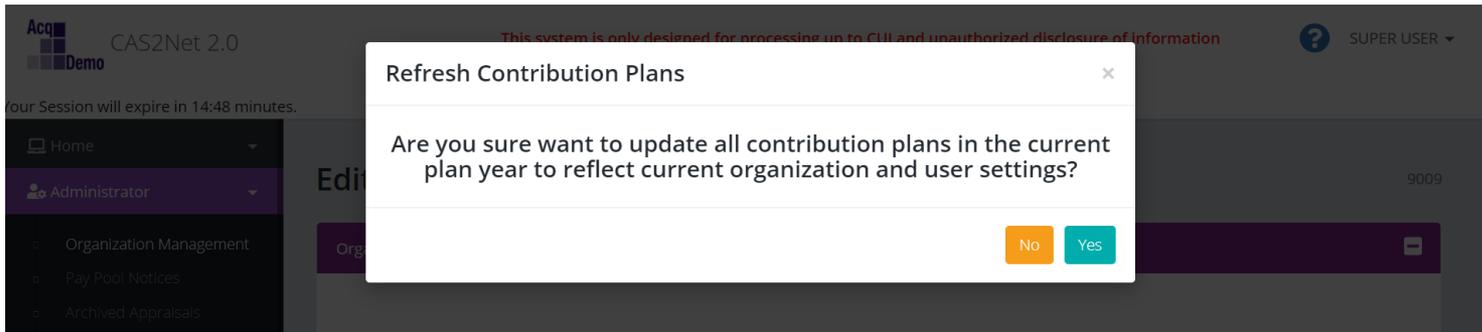


Organization +

Organization Hierarchy +

Organization Details under AcqDemo - AcqDemo-PMO

Show UIC/PAS ⓘ Refresh Contribution Plans ⚙ Refresh Managers for Annuals ⚙ Move ⚙ Delete ⚙



Acq Demo CAS2Net 2.0

Your Session will expire in 14:48 minutes.

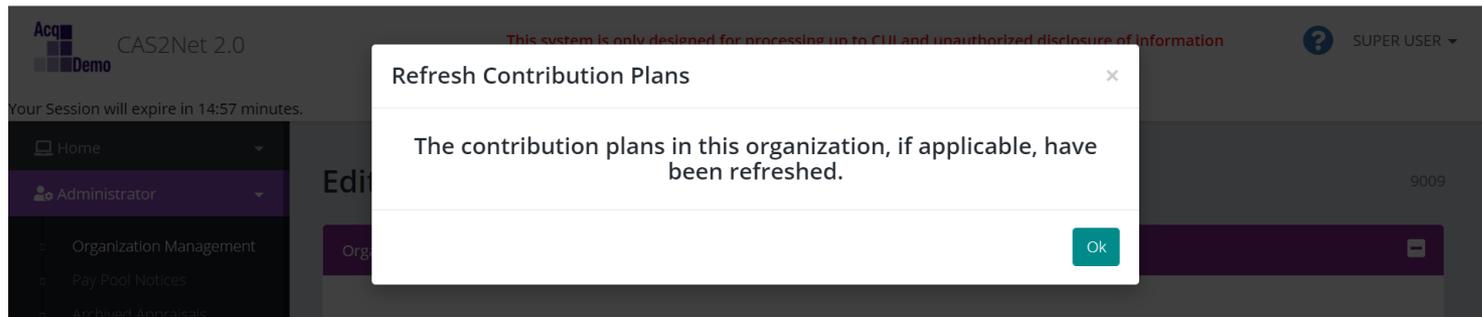
Home Administrator

Organization Management Pay Pool Notices Archived Appraisals

Refresh Contribution Plans

Are you sure want to update all contribution plans in the current plan year to reflect current organization and user settings?

No Yes



Acq Demo CAS2Net 2.0

Your Session will expire in 14:57 minutes.

Home Administrator

Organization Management Pay Pool Notices Archived Appraisals

Refresh Contribution Plans

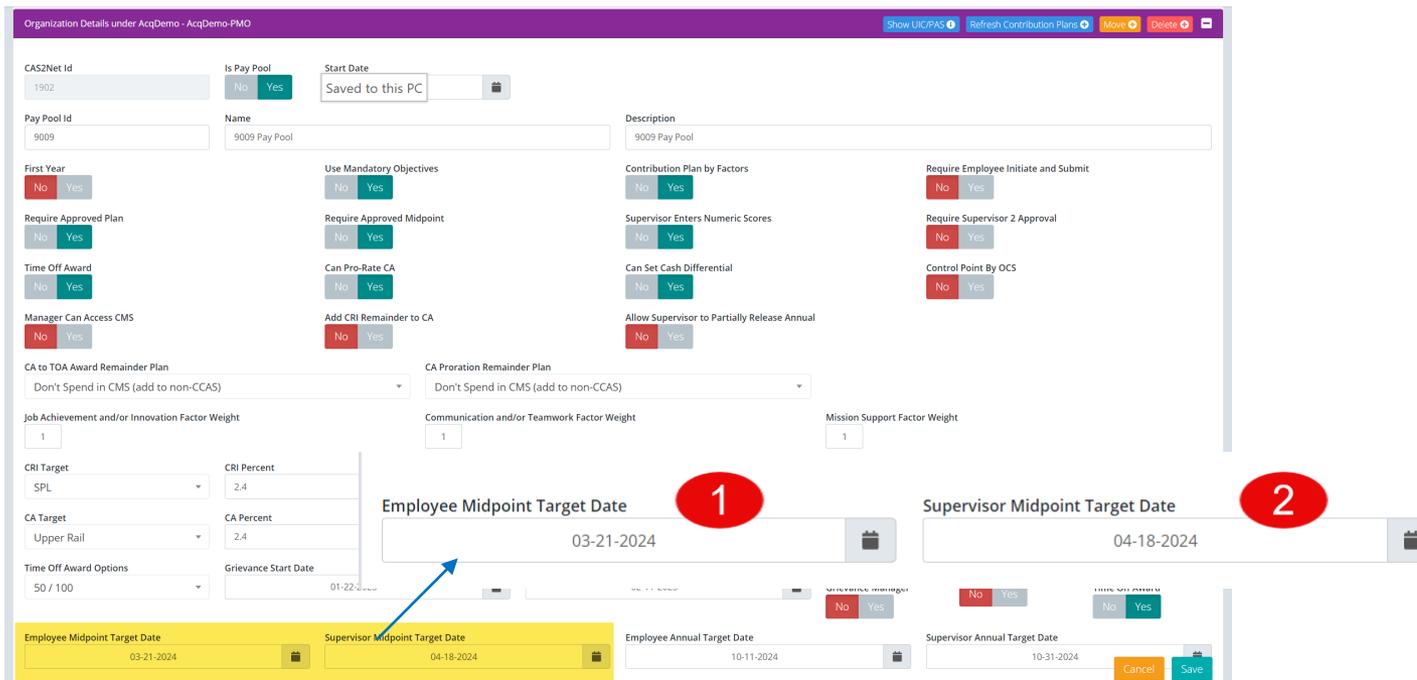
The contribution plans in this organization, if applicable, have been refreshed.

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



Organization Details under AcqDemo - AcqDemo-PMO

CAS2Net Id: 1902 | Is Pay Pool: No | Start Date: Saved to this PC

Pay Pool Id: 9009 | Name: 9009 Pay Pool | Description: 9009 Pay Pool

First Year: No | Use Mandatory Objectives: No | Contribution Plan by Factors: No | Require Employee Initiate and Submit: No

Require Approved Plan: No | Require Approved Midpoint: No | Supervisor Enters Numeric Scores: No | Require Supervisor 2 Approval: No

Time Off Award: No | Can Pro-Rate CA: No | Can Set Cash Differential: No | Control Point By OCS: No

Manager Can Access CMS: No | Add CRI Remainder to CA: No | Allow Supervisor to Partially Release Annual: No

CA to TOA Award Remainder Plan: Don't Spend in CMS (add to non-CCAS) | CA Proration Remainder Plan: Don't Spend in CMS (add to non-CCAS)

Job Achievement and/or Innovation Factor Weight: 1 | Communication and/or Teamwork Factor Weight: 1 | Mission Support Factor Weight: 1

CRI Target: SPL | CRI Percent: 2.4 | **Employee Midpoint Target Date** (1): 03-21-2024

CA Target: Upper Rail | CA Percent: 2.4 | **Supervisor Midpoint Target Date** (2): 04-18-2024

Time Off Award Options: 50 / 100 | Grievance Start Date: 01-22-2024

Employee Midpoint Target Date: 03-21-2024 | Supervisor Midpoint Target Date: 04-18-2024 | Employee Annual Target Date: 10-11-2024 | Supervisor Annual Target Date: 10-31-2024

- 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 the employee when they access the *Edit Profile* page

User Profile - CARTER, BEYONCE GK (ID #260601)

General User Information Impersonate User ⓘ +

Organization Information Refresh Contribution Plan ⓘ Transfer User ⓘ Supervised List ⓘ User Change History ⓘ Supervisor 1 History ⓘ Organization History ⓘ -

DCPDS Position Start Date DCPDS Last Promoted Date

DCPDS Opt-Out No Yes No Yes

Is BUE No Yes

AcqDemo Start Date

Start Date in Organization

Position Start Date

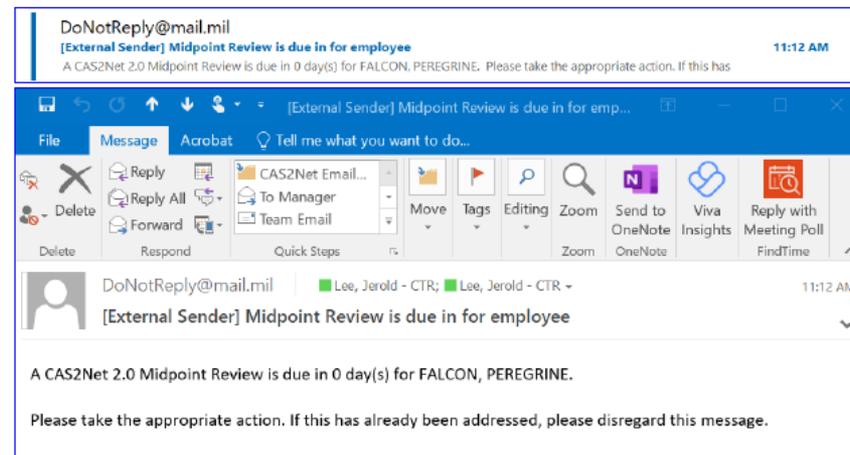
Employee Midpoint Target Date **1**

Supervisor Midpoint Target Date **2**

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								
Midpoint Status	2 Weeks Before Midpoint Target Date		1 Week Before Midpoint Target Date		On Midpoint Target Date		Every Other Day After the Midpoint Target Date	
	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



****Note: Emails are generated to remind the user to complete their designated step.****
*****Emails will be sent 2 weeks, 1 week, day of, or past due, and if past due it will be every other day, of the target date.*****

Midpoint Target Dates

- Scenario 1 : Employee has not submitted Midpoint; Midpoint is in a “Draft” status.
- Email: An reminder email will be sent to the Employee and copy the Supervisor advising of the upcoming Due Date.

CAS2Net-generated Email for Midpoint Target Date								
Midpoint Status	2 Weeks Before Midpoint Target Date		1 Week Before Midpoint Target Date		On Midpoint Target Date		Every Other Day After the Midpoint Target Date	
	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

Midpoint Target Dates

- Scenario 2 : Employee has submitted Midpoint Assessment for Approval.
- Email: An reminder email will be sent to the Supervisor advising of the upcoming Due Date.

CAS2Net-generated Email for Midpoint Target Date								
Midpoint Status	2 Weeks Before Midpoint Target Date		1 Week Before Midpoint Target Date		On Midpoint Target Date		Every Other Day After the Midpoint Target Date	
	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

Midpoint Target Dates

- Scenario 3 : Employee has submitted Midpoint Assessment for Approval and the Supervisor 1 has approved and submitted to Supervisor 2 (if applicable).
 - Email: An reminder email will be sent to the Supervisor 2 advising of the upcoming Due Date.
- **Note: If no Supervisor 2 is present, the approval will be completed.**

CAS2Net-generated Email for Midpoint Target Date								
Midpoint Status	2 Weeks Before Midpoint Target Date		1 Week Before Midpoint Target Date		On Midpoint Target Date		Every Other Day After the Midpoint Target Date	
	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

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

- | | |
|---|---|
| <input checked="" type="checkbox"/> Employee Id
<input checked="" type="checkbox"/> Employee Name
<input type="checkbox"/> Office Symbol
<input type="checkbox"/> Broadband Level
<input type="checkbox"/> Supervisor 1
<input type="checkbox"/> Supervisor 2
<input type="checkbox"/> Functional Reviewer
<input type="checkbox"/> Sub-Panel
<input type="checkbox"/> Pay Pool
<input type="checkbox"/> Component Level
<input type="checkbox"/> Organization Start Date
<input type="checkbox"/> Presumptive Status
<input type="checkbox"/> Contribution Plan Date Communicated
<input type="checkbox"/> Midpoint Employee Factor Char Counts
<input type="checkbox"/> Midpoint Date Communicated
<input checked="" type="checkbox"/> Midpoint Sup Target Date 2
<input type="checkbox"/> Annual Employee Factor Char Counts
<input type="checkbox"/> Annual Date Communicated
<input type="checkbox"/> Annual Emp Target Date
<input type="checkbox"/> Closeout Status
<input type="checkbox"/> Grievances
<input type="checkbox"/> Mandatory Obj | <input checked="" type="checkbox"/> EDIPI
<input type="checkbox"/> Email
<input type="checkbox"/> Career Path
<input type="checkbox"/> Occupational Series
<input type="checkbox"/> Supervisor 1 Email
<input type="checkbox"/> Supervisor 2 Email
<input type="checkbox"/> Functional Reviewer Email
<input type="checkbox"/> Sub-Panel Manager
<input type="checkbox"/> Pay Pool Manager
<input type="checkbox"/> AcqDemo Start Date
<input type="checkbox"/> Position Start Date
<input type="checkbox"/> Contribution Plan Status
<input type="checkbox"/> Midpoint Status
<input type="checkbox"/> Midpoint Supervisor Factor Char Counts
<input checked="" type="checkbox"/> Midpoint Emp Target Date 1
<input type="checkbox"/> Annual Status
<input type="checkbox"/> Annual Supervisor Factor Char Counts |
|---|---|

	A	B	C	D	E
1	Employee Id	EDIPI	Employee Name	Midpoint Emp Target Date	Midpoint Sup Target Date
2	242859	9999999030	BUNTING, INDIGO	3/21/2024	4/18/2024
3	240471	9999999916	CARDINAL, NORTHERN	3/21/2024	4/18/2024
4	260601	8675309000	CARTER, BEYONCE GK	1 3/21/2024	2 4/18/2024

Skip Midpoint

- In accordance with local business rules, administrators can skip a midpoint assessment if an employee is not required to complete one for the specified performance year.
 - 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”

Midpoint Assessment for BUNTING, INDIGO (ID #242859)

General Information

Contribution Planning

Job Achievement and/or Innovation

Communication and/or Innovation

This record is read-only because administrators do not have edit access.

CAS2Net 2.0 - Powered by ALTESS

The information

Skip Midpoint Assessment

Skip Reason

Select Option

Employee is Transferring

Other

Supervisor is Transferring

Use Closeout

Cancel Skip Midpoint

Midpoint Assessment for BUNTING, INDIGO (ID #242859) (Not Required)

General Information

Contribution Planning Refresh Midpoint

Contribution Plan Effective Date:

Contribution Plan(s) For Fiscal Year:

Contribution Plan - Effective 10-01-2021 - Approved - Communicated on 01-24-2022

Individual Objectives:

Midpoint has been skipped with the following reason: Supervisor is Transferring

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”

The image shows a software interface for managing midpoint assessments. On the left, a form titled "Midpoint Assessment : BUNTING, INDIGO (ID #242859)" is partially visible, showing sections for "General Information", "Contribution Planning", and "Job Achievement and/or Innovation". At the bottom of the form, there are three buttons: "Cancel", "Return for Changes", and "Return to Supervisor 1". The "Return for Changes" button is highlighted with a dashed orange arrow. On the right, a dialog box titled "Return Midpoint Assessment" is open, containing the text: "Are you sure you want to return this midpoint assessment to the employee? If so, this will clear the method of communication and date." Below the text is a "Justification" text area and two buttons: "No" (orange) and "Yes" (teal).

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).

Closeout Assessments

Closeout Assessments

- 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 not 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.**

Closeout Assessments

- 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”

designed for processing up to OUI and unauthorized disclosure of information is a violation of the law

Add Closeout

User: CARTER, BEYONCE GK

Reason: **Select Reason**

- Change in Position
- Change in Supervisor
- Other

End Date:

Cancel Add

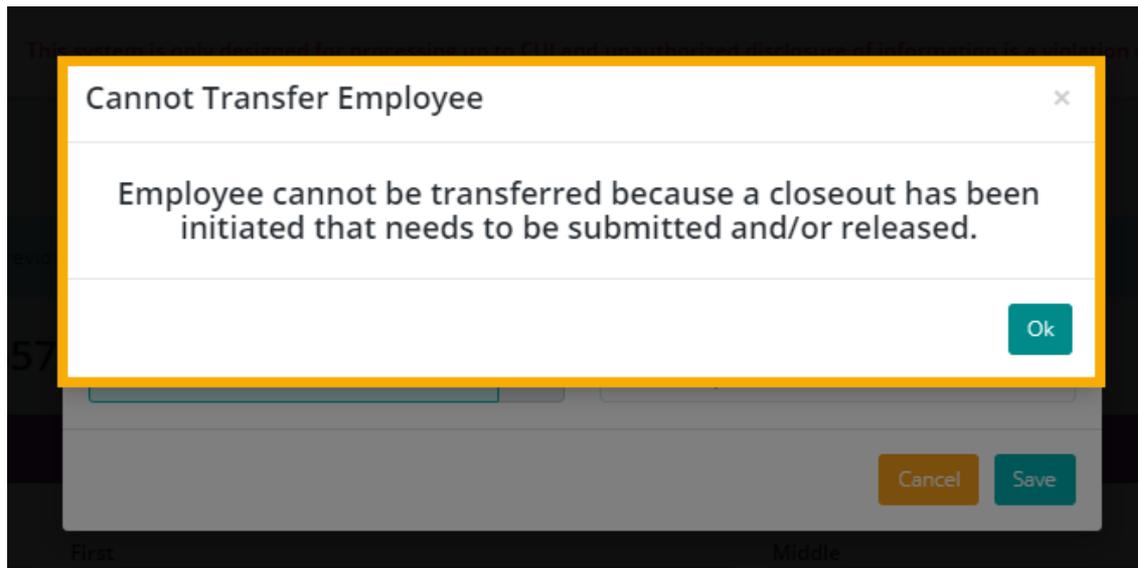
Closeout Assessments

- 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”

The screenshot displays the 'Closeout Assessment for BEYONCE CARTER (Draft)' page. The left navigation menu has three red circles with numbers 1, 2, and 3. Circle 1 is over the 'Administrators' menu item. Circle 2 is over the 'CCAS Management' menu item. Circle 3 is over the 'Closeout Assessments' menu item. The main content area has three tabs: 'General Information', 'Objectives', and 'Job Achievement and/or Innovation'. The 'Delete Closeout Assessment' dialog box is open on the right, with a red circle 5 over the 'Yes' button. The 'Delete' button in the bottom right of the main content area has a red circle 4 over it. A message at the bottom of the main content area states: 'This record is read-only because administrators do not have edit permission.'

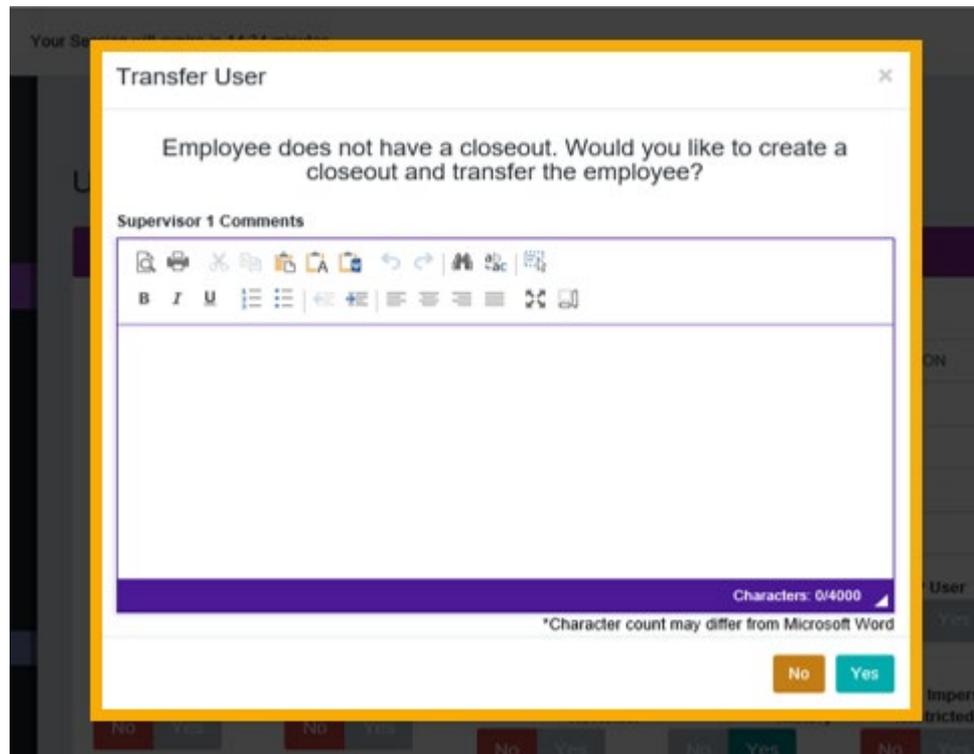
Closeout Requirement for Transfers

- 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



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



2024 Open Forum Schedule

- ✓ 04 January, 1pm – 2:30pm ET: CCAS Pay Transactions
- ✓ 01 February, 1pm – 2:30pm ET: CCAS Grievance, (T) Next Higher Official Process, and Archive/Transfer
- 07 March, 1pm – 2:30pm ET: Assigning Mandatory Objectives, Mid-Point Review, Additional Feedback, and Closeout Assessment
- 04 April, 1pm – 2:30pm ET: Communicating with AcqDemo Program Office on CAS2Net and CCAS Issues
- 02 May, 1pm – 2:30pm ET: Reports – FY-based Reports & Current Settings Reports
- 06 June, 1pm – 2:30pm ET: Macro Free Sub Panel Spreadsheet and Compensation Management Spreadsheet (CMS) Introduction
- 11 July, 1pm – 2:30pm ET: Creating Sub-Organization Levels and Assigning Sub-Panel Managers, and User Role Assignments
- 01 August, 1pm – 2:30pm ET: CCAS Spreadsheet Test Schedule (Offline Sub-Panel Meeting Spreadsheet, Offline CMS, Macro Free versions, and CAS2Net Online versions)
- 05 September, 1pm – 2:30pm ET: Post Cycle Modules (Appraisal Status, Offline Interface, Previous Cycle Data, Sub-Panel Meeting, CMS Online, and Macro-Free CMS)
- 12 September, 1pm – 2:30pm ET: Transfer, Archive and Post Cycle Activities
- 19 September, 1pm-2:30pm ET End of Cycle Checklist
- 26 September, 1pm-2:30pm ET: Sub Panel Spreadsheet and CMS (Offline, Online, and Macro-Free)
- 03 October, 1pm-2:30pm ET: Discrepancy Reports
- 10 October, 1pm-2:30pm ET: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool
- 17 October, 1pm-2:30pm ET: Pay Pool Analysis Tool (PPAT)
- 07 November, 1pm-2:30pm ET: Initial and Final Upload
- 21 November, 1pm-2:30pm ET: Not Final Reports and Data Complete Reports
- 05 December, 1pm-2:30pm ET: Grievance/Grievance Window

Open Forum Questions?

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