DoD Civilian Acquisition Workforce
Personnel Demonstration Project (AcqDemo)

CAS2Net
for
Employees and Supervisors
Fall 2019

http://acqdemo.hci.mil

Welcome to AcqDemo CAS2Net for Employees and Supervisors.

The intended audience for this course are AcqDemo employees and supervisors. This course is also intended for supervisors who are not in AcqDemo but manage AcqDemo employees.

The overall objective of this course is for both employee and supervisor to have a better understanding of:
Access and login into CAS2Net
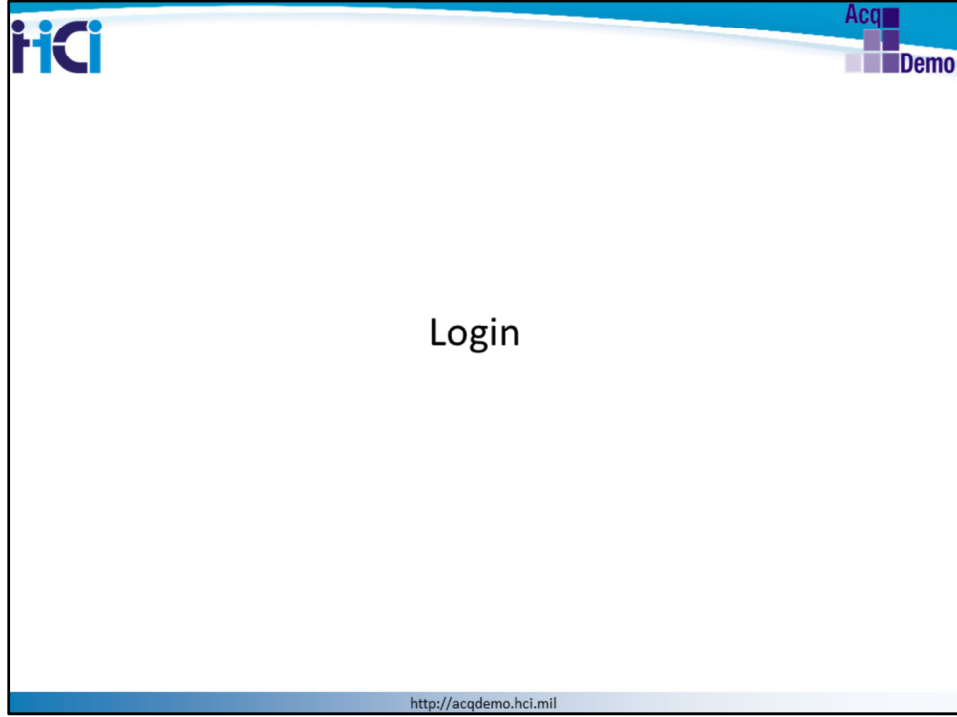CAS2Net modules and processes
CAS2Net reports

This course will cover how to use CAS2Net modules to enter individual objectives, employee self-assessments, and supervisors assessments
The modules that will be described are:
- Contribution Plan
- Midpoint Review
- Annual Assessment
- Closeout Assessment
- Additional Feedback

The course will conclude with an overview of reports with examples to show both

employees and supervisors how to generate a PDF report

Login

http://acqdemo.hci.mil

Let's go over how to login to CAS2Net and what credentials will be needed

The first thing to do is access the CAS2Net site using the URL displayed on this page: https://cas2net.army.mil . You will need a CAC card to login and access CAS2Net. Review the Usage Policy statement then click "I Agree" and enter your CAC PIN on the following screen.

you're Administrator is your first level help desk. Direct your questions and issues to your local Administrator. You can see Component / Organization Points of Contact on the Contact page located under Home on the left menu navigation bar. NOTE: If you do not have access to CAS2Net, you will be redirected to a page with the Component / Organization Contact Information so they can help you gain access.
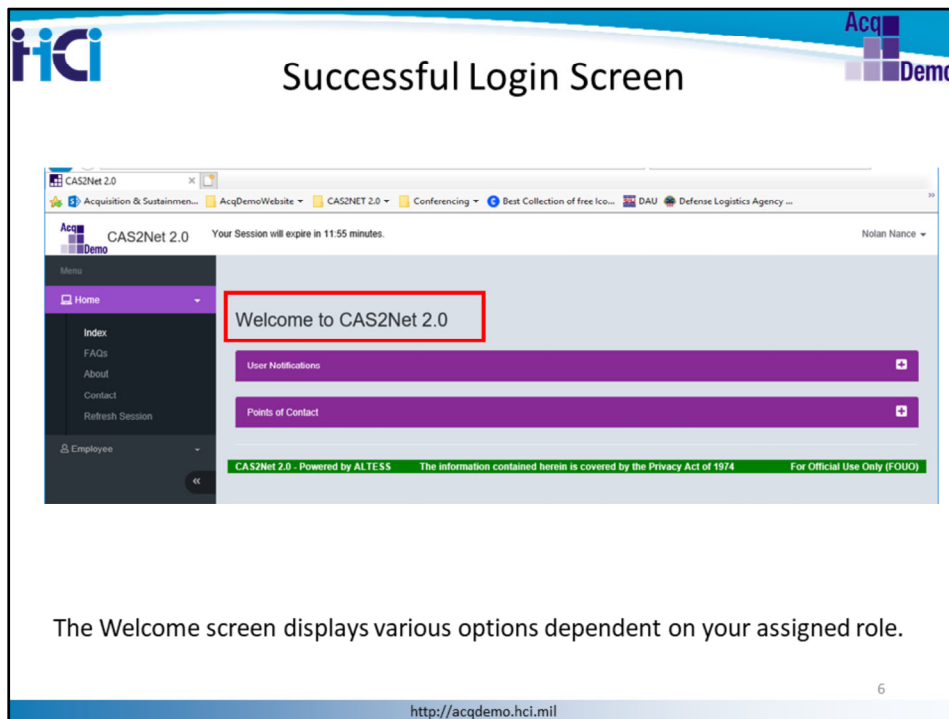
Look for the timer at the top of any page; the countdown indicates how much time is left in your session

Click on any link to reset the timer back to 15 minutes and remember to save your work often!

Note that rich text fields have an auto save feature integrated into the software. Auto Save starts once you type or paste in the rich text field. The auto save counter will count down from 300 and the system will automatically save the updated text.

Successful Login Screen

The Welcome screen displays various options dependent on your assigned role.

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CAS2Net successfully logs the user in and displays the "Welcome" screen.
The welcome screen consists of your point of contacts for your Pay Pool structure as well as supervisor information.

The Navigation options bar is located on the left side and top right of our screen.

The left side navigation options will display available menu options dependent on user role.

- All users will see the Home menu options: Index, FAQs, About, Contact.
- If you are an "AcqDemo" employee and have no other assigned roles, you will see the "Welcome" screen with only the Employee menu option displayed on the navigation bar to the left.
- If you are an "AcqDemo" supervisor, you will see your Employee Menu, if you are in AcqDemo, as well as a Supervisor Menu on the left.

From the upper right side of the screen, click on your name

This will activate a drop down list with the options to Edit Profile or Log Out

Select Edit Profile

The Employee Profile interface will be displayed.

As an employee, you can edit some General User Information, and view the following panels:
General user Information
Organization Information
Salary Information
Organization Roles
Trusted Agents

Remember that you can collapse or expand panels by clicking on the "+" sign to the right of each panel name
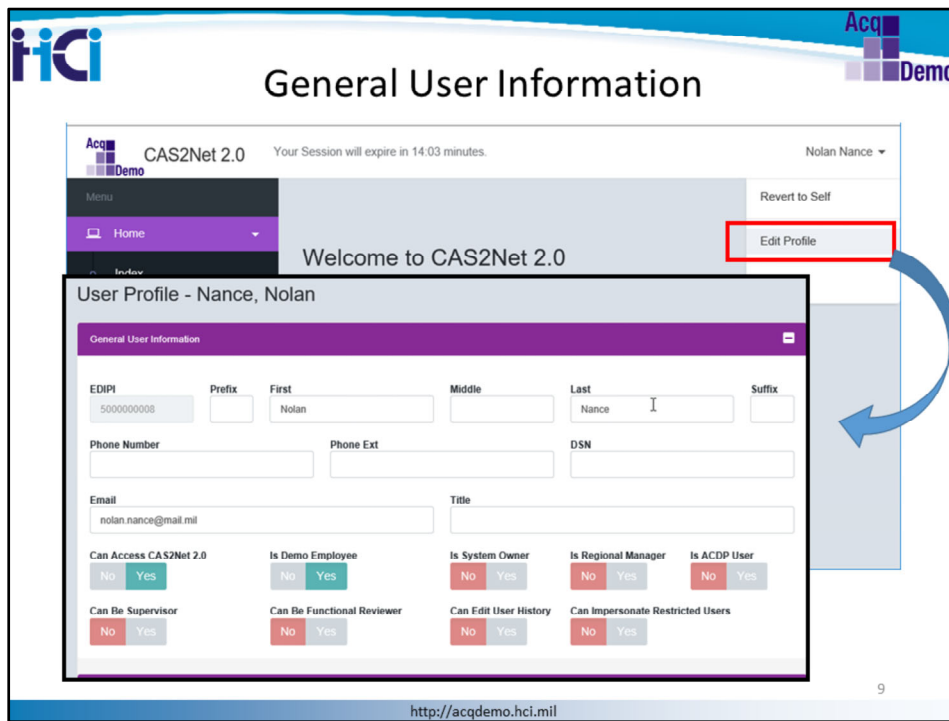
When Editing your own profile, use the General User Information screen to change or add an email address and/or phone number. If you update any of your information, make sure it is entered correctly.

Remember to select the Save button after updating your information.

Review the Organization Information to ensure you are assigned to the correct pay pool or sub pay pool
Remember that some fields are not open to editing – For example, you can see the name of your organization, but cannot change it.
If you find an error, contact your Administrator; he or she has the appropriate access rights to make a change
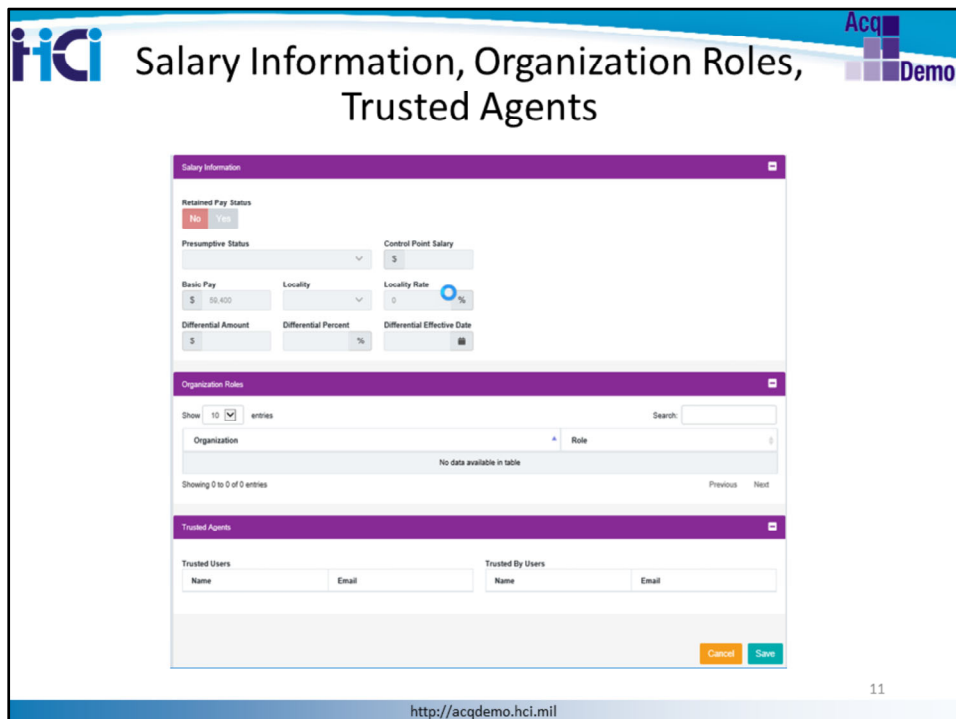
Salary Information and Organization Roles are available to review.

Your Administrator will establish the correct values for your record based on information they receive from your organization.

The Organization Roles Panel will display any roles assigned to the user. List of roles consist of Administrator, Super User, and Manager.

The Trusted Agents panel will display a list of Trusted Users to work on your behalf and/or a list of Trusted by Users who have assigned you as a Trusted Agent. The trusted relationship is used if you are out of the office for an extended period of time, or cannot access CAS2Net.
A Trusted Agent role is an agent of a supervisor's role only.
A Trusted Agent's rights are established by the Administrator.
The trusted relationship may be ended by the Administrator upon your return or re-established access.
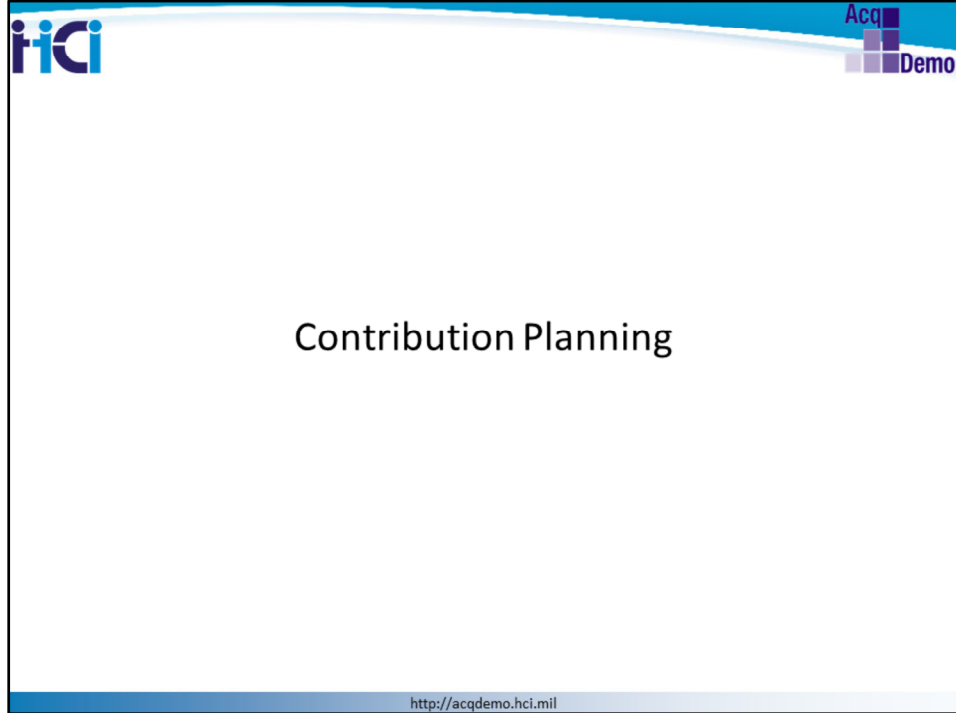
Let's now go over the Contribution Planning module.

This is the first module that you will be using during the appraisal cycle year to enter your Contribution Plan for the year.

The next slides will review the functionality of the Contribution Planning module and process for both the AcqDemo Employee and Supervisor.

The slide title will indicate whether the section is intended for "Employee" or "Supervisor" - check the leading words of the title.

The navigation menu is another indicator on who the action is intended for i.e., Employee menu or Supervisor menu.

Let's start with the Contribution Plan Module as an Employee.

Access the module by clicking "Contribution Plan" from the navigation bar under the "Employee" button. CAS2Net refreshes to display the "Contribution Plan" screen .

Click on "Copy Objectives from Previous Plan" to auto populate your Individual Objectives with last year's objectives.

In this example, the administrator has configured the Contribution Plan for Individual Objectives, not by factor. You can see there is only one box labeled "Individual Objectives"

Should your pay pool elect to use Mandatory Objectives, your Contribution Plan screen will be different.

Your Contribution Planning Panel will display your pay pool's Mandatory Objectives (ready only) and Individual Objectives. The Individual Objective fields is Rich Text enabled.

Use the Editor to check your spelling, change fonts, format the page, import from MS Word, etc.

Start typing your Contribution Plan. Use the Editor to check your spelling, change fonts, and format the page.

The Individual Objective field is Rich Text enabled. This allows the following functionalities: bullet format, bold, italics, underline, and "cut and paste" from MS Word. This field also has a character limit of 6000 characters to include spaces and hidden characters in Word, such as carriage return. There is an auto save feature that activates as soon as you start typing your objectives

Employee: Contribution Plan Statement by Factor

If your pay pool has objectives by factors, make sure to enter objectives for each of the 3 factors. Click on each factor tab located above the "Individual Objective" text box. Each factor has a character limit of 4000 characters to include spaces.
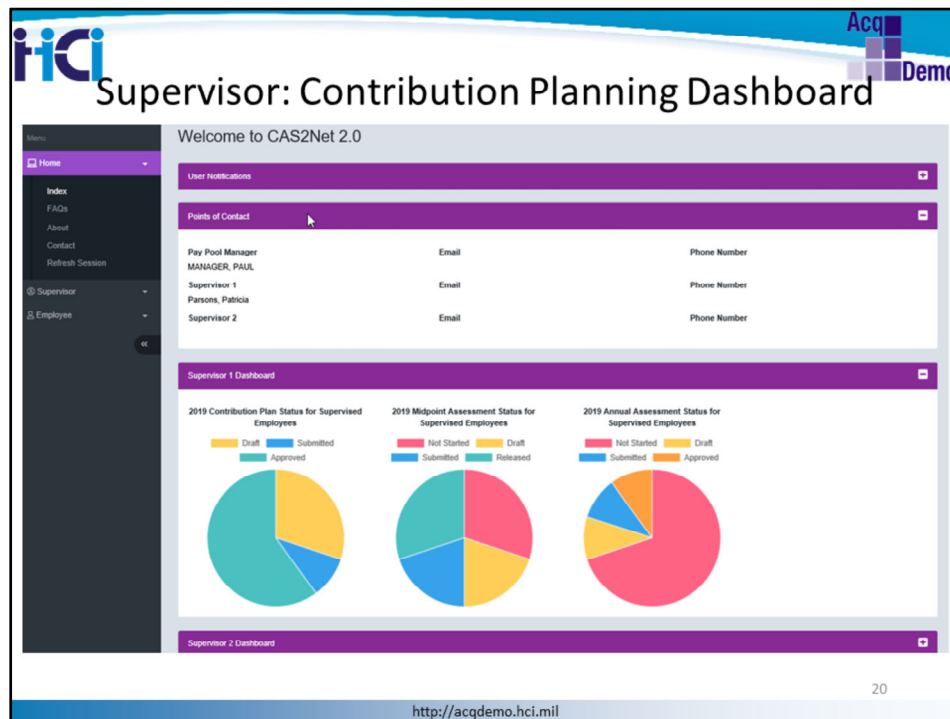
Employee: Contribution Plan Statement
Save and Submit
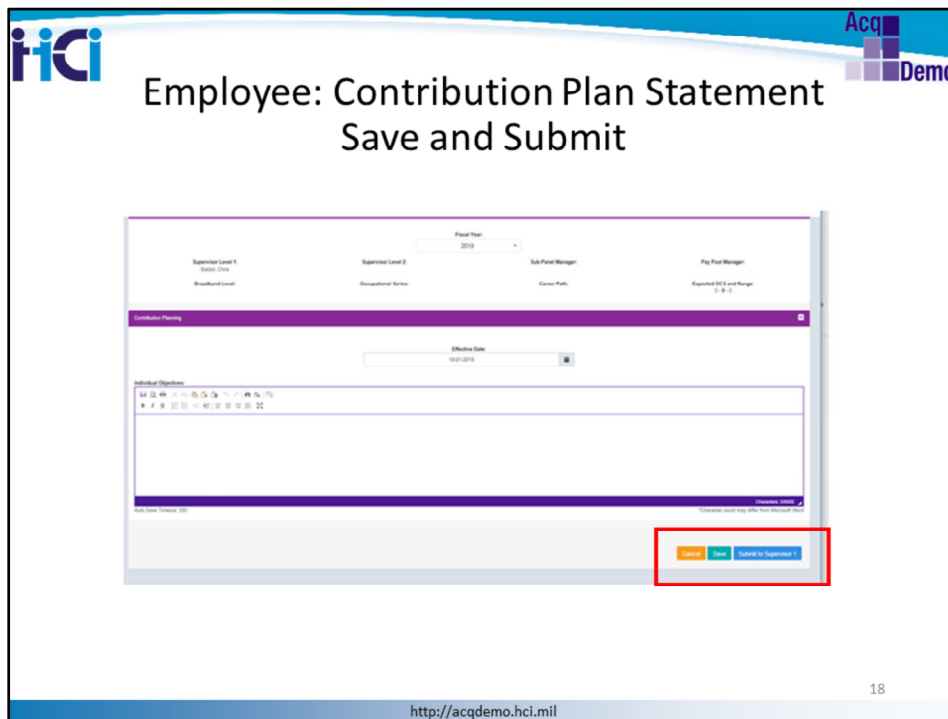
You should save your work prior to moving forward to the next factor, especially if you require more time to complete your plan. This will allow the system to keep a copy of your "draft" plan. When you have completed your plan and are ready to submit it to your supervisor, click on "Submit to Supervisor" button.

A confirmation box will appear to confirm that you are ready to submit your contribution plan for your supervisor's approval. Click "Yes".
Once you have confirmed, your Contribution Plan screen will refresh and you will see the word (submitted) near the title of the screen.

The Contribution Plan will be Read Only once the Employee submits to their Supervisor, and will remain Read Only when approved.

This screen shows how the Contribution Plan will be displayed to the employee. Once submitted or approved, the employee cannot initiate any changes.

Now let's review Contribution Plan Module in the Supervisor's role.

Supervisors have access to view the contribution planning status of assigned employees in the Supervisor Dashboard.

To access the dashboard, click on the "Home" button from your menu to display the "Index" option. Click "Index" to display the "Welcome" screen which includes the Supervisor Dashboard. The screen will display a panel titled "Supervisor I Dashboard" and "Supervisor 2 Dashboard" (if applicable). The dashboard will display pie charts with the status of your employees through the CCAS cycle.

When you click any of the colored sections of the Contribution Plan Status pie chart, a count of employees will be displayed ;
The color code is:
- Red: Not Started
- Yellow: Draft
- Green: Approved
- Blue : Submitted

The status code is:
- Not Started = (not created) {does not exist}
- Draft = (created but not submitted to supervisor/ exist but not submitted)
- Submitted = (sent to supervisor)
- Ready for Supervisor2 approval = Pending Supervisor approval

- Approved = (Contribution Plan Approved)
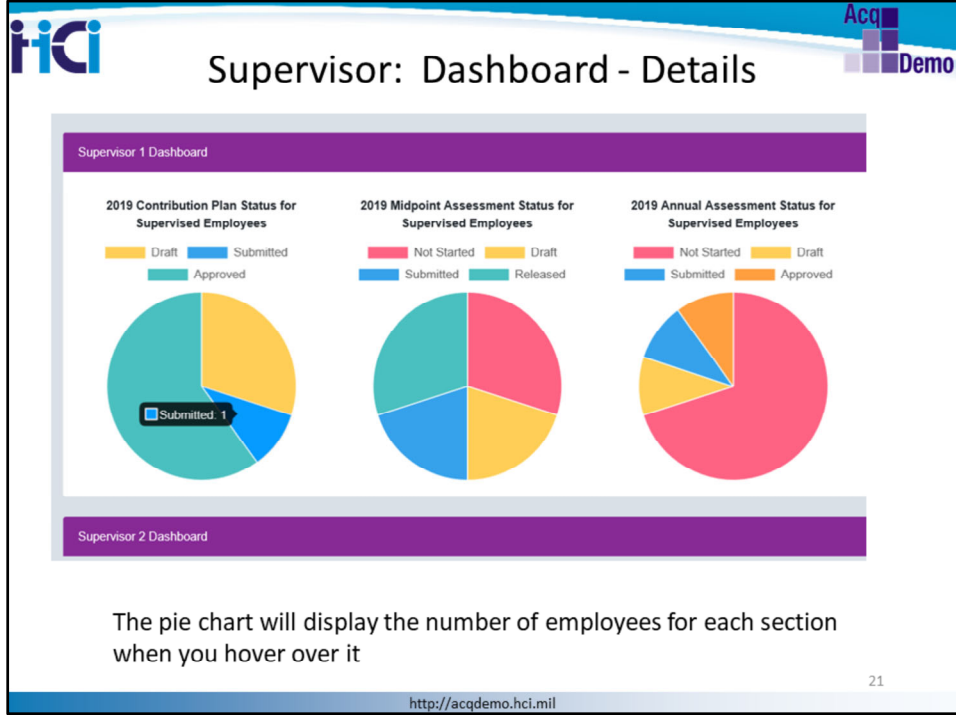
When you hover over the pie chart, it will display the count of employees within each colored section.
In this case, the Submitted section (in blue) represents 1 employee whose contribution plan was submitted

When you click on a colored section, you will see a table displayed with contact information by employee:
- Name of employee
- Phone Number
- Phone Extension
- Phone DSN
- Email Address

You can click on the email address if you need to email the employee.
You can also click on the employee's name (or row) to go directly to the contribution plan for the employee selected.

To view the Supervisor dashboard at any time, go to "Home" and click on "Index" to view

Another option to view your employee's contribution plan status is by clicking on "Contribution Plans" from the Supervisor menu, the supervisor will see a list of employees assigned to him or her.

The supervisor can easily visualize the progress of the Contribution Planning effort for each employee.

The table displays a status for each employee's contribution plan; which could be: Not Started, Draft, Submitted, Ready for Supervisor Approval, or Approved

Supervisor can click on an employee's name from the list to work on their employee's Contribution Plan.
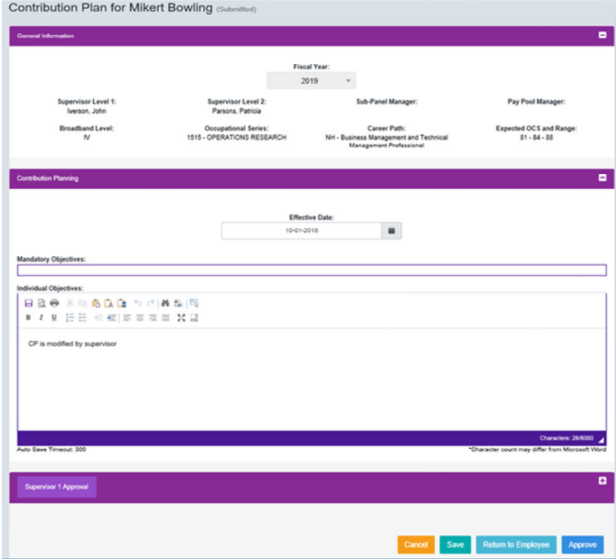
Note: Ensure you are on the current Fiscal Year listed in the General Information Section.

Dependent on the status of the Contribution Plan selected, the employee's screen will have different options.

Selecting a "Submitted" record, the screen will display the last saved text for the selected employee. The supervisor edits and enters text as needed for any objectives (individual or factor).
"Save" button will save changes to the "Contribution Planning" form.

Notes:
For Not Started, a confirmation box will confirm you want to initiate an employee contribution plan and save for employee to review.
For Draft, supervisor can start to type in the Rich Text field as required/needed and save changes.

When the Contribution Plan is ready for approval, the supervisor goes over the final version with the employee and indicates the communication method and the date it was performed.

The supervisor clicks "Approve" to proceed.

However, If more changes are still needed by Employee, the supervisor clicks "Return to Employee" instead.

Supervisor: Contribution Planning Confirmation

Submit Contribution Plan

Are you sure you want to approve the contribution plan?

No   Yes

The supervisor is prompted to confirm approval of the contribution plan.

The supervisor is prompted to confirm approval of the contribution plan

Click YES

Screen will then update the Screen page title with the word (Approved)

The supervisor initiates the modification of a Contribution Plan by clicking on "Modify" for the selected employee.
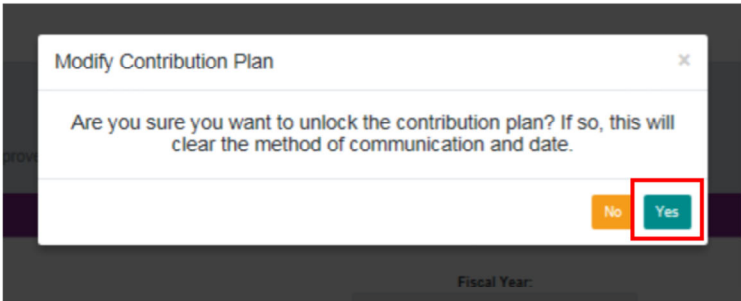
The Contribution Plan can be modified at any time after approval. Only supervisors can initiate a contribution plan modification.

A modification to a contribution plan could be due to changes to the employee's duties or assignments. The contribution plan should reflect current assignments and can be changed up to 90 days prior to the end of the cycle. In other words no later than July 3rd.

The supervisor initiates the modification of a Contribution Plan by clicking on "Modify" for the selected employee.

Supervisor: Confirmation of Modification

Modify Contribution Plan

Are you sure you want to unlock the contribution plan? If so, this will clear the method of communication and date.

No   Yes

Fiscal Year:

Click YES to allow the Contribution Plan to be modified.

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CAS2Net will prompt the supervisor to confirm the modification process of the contribution plan

Click YES to allow the Contribution Plan to be modified.

The supervisor can now make changes to the Contribution Plan.

Look at the editor text box – remember you can use the editor functionality to change fonts, color and formatting style.

Click SAVE at any time to save your work. Click "Return to Employee" if you want to allow the employee to update their objectives

When all changes are complete, the supervisor needs to communicate to the employee that the contribution plan modification is complete.

Select a method of communication and date it was performed and click "Approve".

Midpoint Assessment
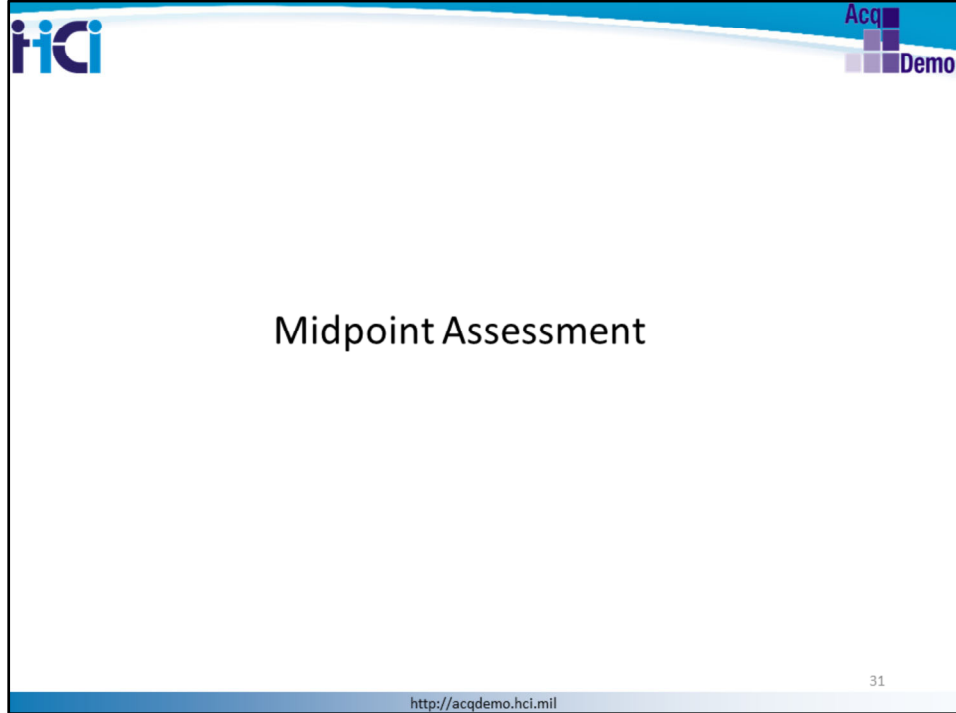
Let's now go over the Midpoint Assessment module.

Some of the next slides are intended for AcqDemo employees and some for supervisors. We'll review the functionality of the Midpoint Assessment module and process for both the AcqDemo Employee and Supervisor.

The slide title will indicate whether the section is intended for "Employee" or "Supervisor" - check the leading words of the title.

The navigation menu is another indicator of the action owner; i.e., Employee menu or Supervisor menu

The midpoint assessment is a highly encouraged step in AcqDemo. Check your local business rules on completion of the employee mid-point self-assessments. It occurs about halfway through the cycle year, around April or May. The midpoint assessment gives a chance for employees to share with their supervisor their own assessment on how they are doing on the job and to receive supervisor feedback. Employees provide a narrative for each of the 3 factors, and the supervisor enters and communicates a narrative assessment (no rating) to their employees.

Access the module by clicking "Midpoint Assessment" from the navigation bar under the "Employee" button. CAS2Net refreshes to display the "Midpoint Assessment" screen.
On this screen, you can see 3 tabs where you can enter your Midpoint Self-Assessment by Factor (See "Job Achievement and/or Innovation", "Communication and/or Team Work " and "Mission Support" tabs.). You can also open the "Contribution Planning" panel by clicking the "+" button on the panel header to see and refer to your current Contribution Plan.

Let's now start writing our self-assessment for each factor.

Employees enter their midpoint assessments for each factor in the "**Employee Assessment**" text box. The text box allows formatting. Employees can write into the text box directly or copy and paste from a Word document. Remember to save often and pay attention to the *"Session will expire in … min"* countdown at the top of the page.

A countdown timer will start for each factor once you begin typing your narrative. CAS2Net will automatically save your information after 300 seconds.

Once you have entered your self-assessment for each factor, click on "**Submit to Supervisor**".

You do not need to enter the entire self-assessment in just one session. Click "Save" to not lose your work and come back to it later.
When done, click "Submit to Supervisor". Once you do, the self-assessment becomes Read-Only, so make sure you are satisfied with the self-assessment before you click Submit.

At this time, employees need to wait for the supervisor to write a supervisor assessment and approve the midpoint before they can see it in their Reports page. The supervisor could decide to:

(1)   return the self-assessment to the employee for further edits
(2)   write a supervisor assessment and approve the mid-point

Employees receive a User Notification informing them that the supervisor has returned the midpoint self-assessment. When employees login to CAS2Net, they can review messages by reading the "User Notifications" section at the top of the Home page. The notifications include a date stamp "07/29/2019" and the content of the message "Midpoint Assessment Returned by Supervisor 1". The employee will also receive an email notification.

This slide shows the midpoint self-assessment has been returned for changes. Employees can still click on the "Save" button to save their work at any time, if they cannot complete the self-assessment in one session.

As before, once employees feel satisfied with the completed changes, they click on the "Submit to Supervisor" button to send the write up back to the supervisor for review.

The midpoint assessment by the supervisor is a required step in AcqDemo

Access the module by clicking "Midpoint Assessment" from the navigation bar under the "Supervisor" button. CAS2Net refreshes to display the "Midpoint Assessment" screen.

Click on an employee's name – Select one that shows a "not started" status. In our example, the employee's last name is "Rich" and first name is "Richie". The supervisor will NOT be able to initiate an Employee assessment if the Pay Pool configures the system to require employees to initiate, or if they see a "**" beside the status indicating the employee needs an approved contribution plan.

Previous slide notes said select one where self-assessment is not started. When a Supervisor selects an assessment with status "Not Started"; CAS2Net will verify if the Supervisor would like to initiate an assessment?" Selecting YES will allow the supervisor to enter their Supervisor Assessment portion.

CAS2Net displays the employee's contribution plans, any mandatory objectives, and the current individual objectives. This helps the supervisor review the employee's contribution planning objectives as they enter their assessment for each of the three factors in the appropriate textbox. Note that the text boxes benefit from the online formatting function.

Comment: Still on the not started by employee process.

When the employee has not started his or her self-assessment, the options available to the supervisor are "Cancel", "Save", or "Submit to Supervisor 1". The supervisor can start writing the Midpoint Assessment and "Save" it pending input from the employee. If the Employee chooses not to provide their self-assessment, from this window the supervisor has the option to Submit to Supervisor 1 to complete the Mid-Point Assessment.

Supervisors access their Dashboard from the Home button on their supervisor menu. They refer to their dashboard to visualize the status of their midpoint assessment process. In the example above, half of the supervisor's employees have submitted their midpoint self-assessment and half have not started it. By hovering over any of the segments within the midpoint assessment status pie chart, supervisors access a list of employees whose names make up that segment, along with their phone number and email address

In this example, employees have **not yet started** their self-assessments. Selecting another status would match employees whose midpoint assessment is in the selected status.

The status shows "Submitted"

Click on employee row to display the midpoint self-assessment submitted by the employee

Supervisor: Complete Midpoint Review

CAS2Net displays the employee's midpoint self-assessment.

➤ If not satisfied with employee's self-assessment, return it to employee
➤ If satisfied, enter your assessment by factor and approve

The screenshot corresponds to the step where the supervisor has clicked on the name of an employee who has submitted a midpoint self-assessment.

The supervisor reviews the employee's assessment and enters an assessment for each of the 3 factors.

Supervisors have now four choices:

"**Cancel**": system returns to previous page without saving updates

"**Save**": system saves input for future sessions when write-up cannot be completed in one session

"**Return to Employee**": supervisor wants employee to make changes to their midpoint self-assessment

"**Approve**": supervisor completes the midpoint review process by approving it. Requires communication with employee about the assessment, recording the method of communication and date it occurred.

Supervisor: Communicate Midpoint Assessment

When satisfied with his/her midpoint assessment write up and with the employee's midpoint self-assessment, the supervisor approves the midpoint assessment. The supervisor documents the method of communication and the date in the "Supervisor 1 Approval" tab.

This slide shows the Method of Communication, Date Communicated, and Communicated by Supervisor. Supervisors must fill out the boxes with the appropriate information before clicking on the "Approve" button. Missing data will come back as error messages. When the approval is successful, the assessment is released to the employee in view-only mode. Any change after this approval step will require a modification. See next section for how to modify a midpoint review.

If the midpoint review has been released to the employee but needs to be updated, supervisors can initiate a modification from the Midpoint Assessment page.   Only the supervisor can initiate an update.

The supervisor has 3 options:

      Cancel: returns to the previous page

      Return to Employee: supervisors need employee to change the self-assessment

      Modify: supervisor wants to change their assessment, but does not need employee to update the self-assessment

Supervisor: Enter Modification Narrative

Midpoint Assessment for BARRY DREW (Submitted)

If you returned the midpoint self-assessment to employee, start entering your changes in the Supervisor Assessment textbox and click "Save".

➤ Once your employee returns their self-assessment to you, you will be able to approve it, as you did for the initial Midpoint Assessment

If you choose to "Return to Employee", you can start entering changes to your midpoint assessment narrative since the supervisor's midpoint assessment text box is now in edit mode; remember to "Save" as often as needed to not lose work.

However, you will need to wait for the employee to resubmit their self-assessment before you can approve it again.

Once the employee has resubmitted the self-assessment, the supervisor will see the status changed to "Submitted" from the midpoint review tracking list.

Click on the row for the appropriate employee to open their midpoint assessment

Supervisor: Approve Midpoint Modification

If you had returned the Midpoint Assessment to your employee, you would see the updated employee self-assessment and the option to approve.

If you had chosen to only change your supervisor assessment, you would see the option to approve.

If you had returned the Midpoint Assessment to your employee, you would see the updated employee self-assessment and the option to approve.
If you had chosen to only change your supervisor assessment, you would also see the option to approve.

Either way, you need to communicate the modified midpoint assessment to your employee and enter the method of communication and date communicated.
When done, click "Approve" .

This completes the modification process of the Midpoint Assessment.
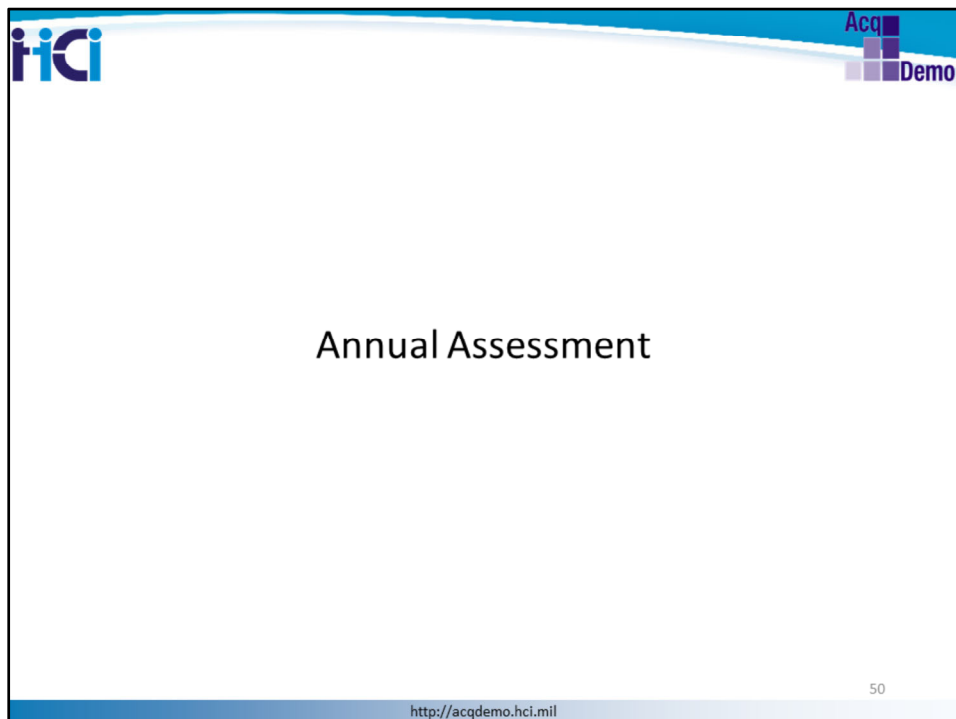
Annual Assessment

Let's now go over the Annual Assessment module.

The next slides are intended for AcqDemo employees and some will be for supervisors. We will review the functionality of the Annual Assessment module and process for both the AcqDemo Employee and Supervisor.

The slide title will indicate whether the section is intended for "Employee" or "Supervisor" - check the leading words of the title.

The navigation menu is another indicator on who the action is intended for i.e., Employee menu or Supervisor menu.

Employee's annual self-assessment is part of the CCAS end-of-cycle process. Employees have the opportunity to enter a narrative into CAS2Net that will be reviewed by their supervisor and the management team during the pay pool panel process. While it is not mandatory, it is strongly recommended that employees write an annual self-assessment.

Click on the employee menu "Annual Assessment" link to access the self-assessment page.

Employees enter a narrative for each of the 3 factors by clicking on each tab.
Click on the "Factor Description" hot link to display the factor descriptors and discriminators

Use the editing functionality to check spelling and/or add formatting details to the narrative. Each factor's text box can hold up to 4,000 characters and employees may choose to cut and paste from a Word document. Note that the actual number of Word characters will be limited to about 3,600 to account for spaces and hidden characters generated in Word.

The employee's Annual Assessment page offers 3 option buttons at the bottom right:
•   Cancel: returns to the previous page without saving
•   Save: click on "Save" often to avoid losing your work
•   Submit to Supervisor: when satisfied with narrative, click to submit to supervisor for review

Refer to the status notification to the right of the header, which now shows "Submitted" to track the Annual Assessment process.

Once employees submit their self-assessment to their supervisor, the status notification changes from "Draft' to "Submitted" and the page changes to Read Only mode.

When supervisors review the employee's self-assessment, they may choose to send it back to the employee for updates. If that happens, the status notification changes from "Submitted" to "Draft-Submitted" and the page changes back to edit mode to allow employees to enter changes to their self-assessment.

At the end of the pay pool process, the pay pool manager finalizes and releases the results of the pay pool decisions to the supervisor. The supervisor will communicate the results and release the assessment to the employee. The status of the annual assessment changes to "Released"

Employees can see the final scores and narratives in the Annual Assessment page, and print a Salary Appraisal Form from their Reports page.

They can also generate a report from the "Reports" menu.
They can generate a PDF from the blue "Generate PDF" button. This completes the Annual Assessment process for employees

Annual appraisals done by supervisors are mandatory in CCAS. They are conducted once a year, during the end of cycle period which is between 1 October and January of the next year, before the first pay day in the new calendar year.

Accessed from the "Home" link of the supervisor's menu, the supervisor's dashboard example shows no annual assessments started. The "Annual Assessment for Supervised Employees" status shows "Not Started".

Click the "Annual Assessment" link on the Supervisor menu to display an employee table.

To initiate the Annual Assessment process, supervisors click on "Annual Assessments" button from the Supervisor menu.

- "Not Started" status indicator preceded by a double asterisk "**"indicates that a Contribution Plan must first be completed and approved.
- "Not Started" status indicator preceded by a single asterisk "*" indicates a trusted agent relationship.

Click on an employee's name with a "Not Started" status. Some Pay Pools require employees to initiate. In this case, the supervisor will not be able to initiate an Annual Assessment.

CAS2Net opens the Supervisory Annual Assessment page for the employee showing General Information, Contribution Plan Details, and by Factor sections.

Supervisor can enter up to 4000 characters for each factor. Note that the actual number of Word characters will be limited to about 3,600 to account for spaces and hidden characters generated in Word.

The by Factor panel displays the employee's self-assessment for each of the three factors. Click on each factor tab to enter the supervisor assessment by factor, as well as a recommended Categorical Score, a recommended Numeric Score (if this is part of the process for your pay pool) and a Performance Appraisal Quality Level (PAQL) score.

Click "**Save**" when done. Note that this does not release the Annual Assessment to the employee. The results of the pay pool process won't be released until approved by the Pay Pool Manager.

Once an employee submits their self-assessment to the supervisor, CAS2Net 2.0 offers supervisors the following options:

➢ **Cancel :** returns to previous screen

➢ **Save:** click often to avoid losing your work

➢ **Return to Employee:** sends the self-assessment back to employee for further changes

➢ **Submit to Pay Pool:** makes the annual assessment narrative, along with rating recommendations available to the sub-panel or pay pool panel members

Click "**Return to Employee**" to send the self-assessment back to the employee.

When supervisors return the self-assessment to employees for revisions, supervisors may keep on completing their assessment narrative while their employee updates their self-assessment.

When the employee resubmits, the Annual Assessment status changes to "Draft-Returned". It is the same status that the employee will see next to the Annual Assessment header from their Employee page.

Check the status of the Annual Assessment: it has now changed to "Submitted", which indicates that the employee has submitted their changes to their self-assessment. Supervisors will review the self-assessment, complete the supervisor assessment narrative, enter scores, and submits for sub-panel or pay pool panel review. For each of the three factors, supervisors recommend the following scores:

o   Categorical Score
o   Numeric Score (if this is the process for your pay pool)
o   Performance Score

Click "Submit to Pay Pool" when satisfied with narratives and your score recommendations.

Supervisors may still modify the annual assessment narrative and scores recommendation after submitting to the pay pool. This could happen after pay pool deliberations result in a request for changes to the supervisors' recommendations.
Click "Modify"
Coordinate with your Administrator to unlock the assessment if the scores and/or narratives are locked.

Supervisor: Submit Modification to Pay Pool

Supervisors enter changes to the narrative and/or recommended scores and submit back to pay pool when done.

➤ Textboxes change to edit mode to allow modification

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The Annual Assessment status changes to "*Submitted*" once the Supervisor has clicked on "**Modify**" assessment. Supervisors enter changes to the narrative and/or recommended scores and submit back to pay pool when done.

Click "**Return to Employee**" if changes by employee are needed as well. This will reopen the self-assessment for employee's edits. (The employee will not see the supervisor's recommended ratings.)

Click "**Submit to Pay Pool**" when all changes are done.

Only when the pay pool manager approves the results of the pay pool can results be released. At that time, supervisors can print the Annual Assessment report and discuss results with employees.

The example above shows that the Annual Assessment has been approved by the pay pool manager. Supervisors must wait for the annual appraisals to be released in order to provide the results to the employee. The Annual Assessment status shows "Approved", so the results are now available for the supervisors to communicate with their employees.

Once the supervisor has released the Annual Assessment to the employee, the status changes to "*Released*".

A released assessment displays the final approved scores and narratives, which can be viewed by employees

Click on the "Supervisor Approval" tab to document the method of communication, the date it occurred and the name of the supervisor who conducted the communication.

Both supervisors and employees may generate an Annual Assessment report from the released Annual Assessment page.

Click on "**Generate PDF**" to generate the Annual Assessment report

Supervisors and employees may choose the "Reports" functionality from the menu to generate in a PDF format either a released Annual Assessment or the Salary Appraisal Form.

Closeout Assessment
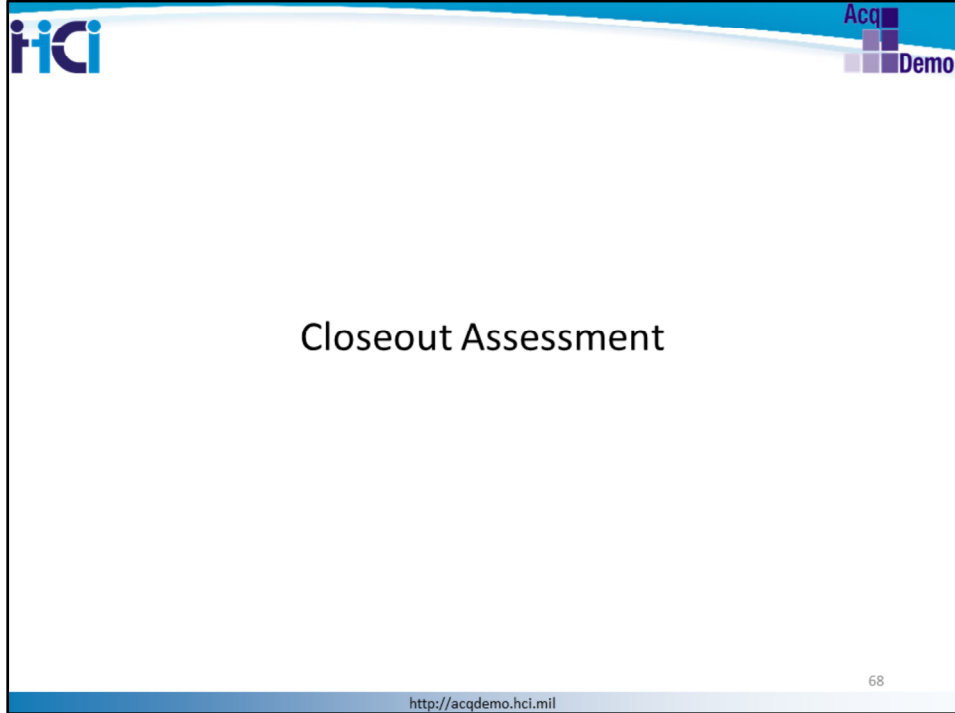
Let's now go over the Closeout Assessment module.

The next slides are intended for AcqDemo employees and some will be for supervisors. We'll review the functionality of the Closeout Assessment module for both the AcqDemo Employee and Supervisor.

The slide title will indicate whether the section is intended for "Employee" or "Supervisor" - check the leading words of the title.

Employee: Closeout Assessment

Closeout Assessments are used to assess the contribution of employees who are leaving their current job during the CCAS cycle. Also, supervisors who are leaving their current job need to complete a closeout assessment for their current employees before they leave.

➢ Closeouts are not the same as Annual Assessments; closeouts are only used to document a partial CCAS cycle; and closeouts do not have scores.

Employees do not initiate the Closeout Assessment process. Supervisors develop a closeout assessment for employees who are leaving their current job, either within the same pay pool or to another pay pool. Supervisors who are leaving the organization also must prepare a closeout assessment for their current employees to help the new supervisor determine their end of cycle ratings.

The Closeout Assessment is activated for the Employee Menu when the supervisor initiates the closeout.

Click the "Closeout Assessment" hot link from the employee's menu to access the Closeout Assessment page.

Employees can complete the self-assessment with by objectives or by factors. To enter a closeout self-assessment against individual objectives, employees enter comments into the textbox below the "Individual Objectives". The text box shown is ready for input and has formatting functionality.

Employees enter self-assessments by factors in each of the textbox.
Make sure to enter your narrative for each of the three factors

When working on your closeout self-assessment, you have 3 options**:**

Cancel: returns to previous page
Save: click on "Save" often to avoid losing your work
Submit to Supervisor: when satisfied with your comments, click "Submit to Supervisor"

In our example, we'll click "**Submit to Supervisor**"

Once employees submit to supervisor, the closeout assessment becomes read-only and shows a status of "*Submitted*". That means it is important to make sure you are satisfied with your write-up before submitting to your supervisor.

Once the supervisor approves the Closeout Assessment, it is released to the employee, who can review it by clicking on the Closeout Assessment link from the employee menu and the Closeout Assessment with a status of "*Released*".

Employees can also review their closeout assessment by generating a Closeout Assessment Report
This completes the Closeout Assessment process for employees

Closeout assessments are initiated by supervisors. Closeouts are used to assess contribution for a partial CCAS cycle. The Closeout assessment is different from the Annual Assessment and they cannot be used interchangeably. Closeout assessments do not include with contribution ratings or performance ratings. The closeout assessments will help the incoming supervisor to complete the annual appraisal at the end of the rating cycle.

The reasons to develop a closeout assessment are:

           - an employee is leaving his/her current job

           - a supervisor is leaving the organization.

To initiate a Closeout Assessment, click on the "Closeout Assessments" hot link from the supervisor menu.

View Status from Employee Closeout – Supervisor list. Options are:

Not Started: Supervisor has not yet initiated the Closeout process for that employee

Draft: Supervisor has created a draft closeout for the employee and supervisor to start writing their assessments

Submitted: Employee has submitted draft for supervisor's review, or the Supervisor submits on behalf of the Employee

Draft – Returned: after submitting, Supervisor has returned to employee for updates

Released: Supervisor has completed and approved the assessment. Supervisor recorded the Method of Communication, the Date Occurred, and their name in the "Approval"

section of the closeout assessment.

Once a Closeout is released, the Closeout Assessment process is completed.
Click on employee name "Mikert Bowling"

Supervisor: Select Employee Name for a Closeout Assessment

CAS2Net prompts the supervisor to select the reason and date for the closeout for the selected employee. Select from options below:
Employee is transferring
Other
Supervisor is transferring

Click "Add"

The Objectives section of the Closeout Assessment page displays:
- Effective End Date
- Contribution Plan Effective Date
- Individual Objectives
- Any Mandatory Objectives
- Employee's Comments (read-only)
- Supervisor's Comments (editable)

Review the displayed information. Supervisors can complete the closeout self-assessment either by objectives or by factors. if the closeout is by objectives, complete the Supervisor 1 Comments section.
Click "Save" at the bottom of the page as often as possible to avoid losing your work.

Supervisor: Enter Closeout Assessment by Factor

If by factors, enter your narrative in the text box labeled "Supervisor 1 Assessment" for each of the three factors.

If by factors, use the text box in the Factor section to enter your supervisor assessment.
Supervisors must enter a narrative for each of the 3 Factors:

> If supervisors enter a narrative by Objective, they do not need to also enter a narrative by factor

> If supervisors enter a narrative for one factor, they must enter a narrative for all 3 factors

Check your organization's business rules for more guidance on these options.
Click "**Submit"**

To finalize the Closeout Assessment process, click on the "Supervisor 1 Approval" tab.

Supervisors have the options to

Cancel: returns to the previous page without saving

Save: click "Save" as often as possible to avoid losing your work

Return to Employee: this option sends the Closeout to employee for updates; choose this option to enable employee to update their closeout self-assessment. It changes the status to "Draft- Returned".

Approve: this option finalizes the Closeout Assessment process

      Supervisors choose this option when they are satisfied with the content and format of the Closeout Assessment

      Supervisors click on "Supervisor Approval" tab to enter a Method of Communication, Date Communicated and Communicated by Supervisor's name

Communicate the closeout assessment with employee then click "**Approve**" to complete the Closeout Assessment process

Additional Feedback
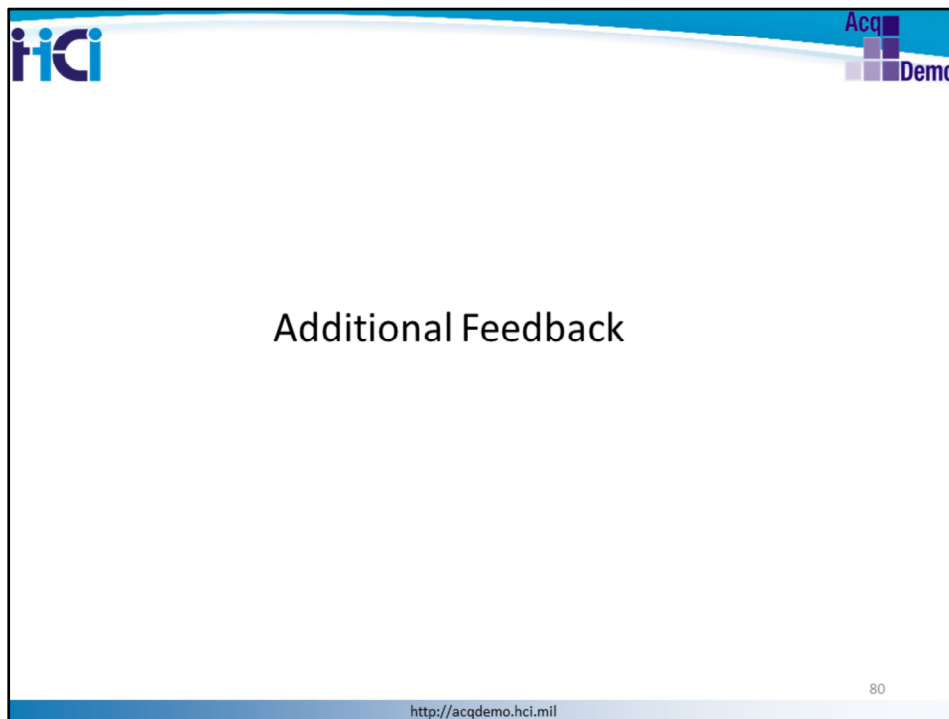
Let's now go over the Additional Feedback module.

Only supervisors can initiate the Additional Feedback and employees do not enter any Additional Feedback narrative. Additional Feedback allows the supervisor to provide additional guidance throughout the contribution rating period, to document declining contribution, or to recognize good contribution.

The next slides are intended for AcqDemo employees and some will be for supervisors. We'll review the functionality of the Additional Feedback module for both the supervisor and employee.

The slide title will indicate whether the section is intended for "Supervisor" or "Employee" - check the leading words of the title.

The navigation menu is another indicator on who the action is intended for i.e., Supervisor menu or Employee menu.

Employee: Additional Feedback

Additional Feedback is an optional activity in CCAS.

> At any time during the performance cycle, a supervisor may initiate an Additional Feedback communication with an employee

Additional Feedback is an optional activity in CCAS.

At any time during the performance cycle, a supervisor may initiate an Additional Feedback communication with an employee. There are no limits to the number of Additional Feedback communications per employee per cycle.

Additional Feedback allows the supervisor to provide additional guidance throughout the contribution rating period, to document declining contribution, or to recognize good contribution.

A User Notification and email will alert the employee when an additional feedback is available.

Employees access the Additional Feedback write up by clicking the "**Additional Feedback**" hot link from the employee menu.

Employee: Access Additional Feedback

Once the employee clicks on the Additional Feedback link, the page displays the "**Additional Feedback**" interface.

To open the write-up and read it, employees click anywhere on the **additional feedback** row that shows the dates and the supervisor's name. Because multiple Additional Feedback narratives are possible, employees need to make sure they open the correct one by referring to the "Effective Date" and "Date Communicated" fields.

Once employees click on each factor tab, to view the narratives. Additional feedback can be developed for one, two or all three factors. Note that the same Additional Feedback can be seen from the Reports function of CAS2Net, where employees can generate a PDF file to view and/or print the Additional Feedback narrative.

Supervisor: Initiate Additional Feedback

At any time during the performance cycle, a supervisor may initiate an Additional Feedback communication with an employee. There are no limits to the number of Additional Feedback reports per employee per cycle.

Additional Feedback allows the supervisor to provide additional guidance throughout the contribution rating period.

The supervisor initiates the Additional feedback by clicking on the blue "**Add Feedback**" button. Because employees do not enter any Additional Feedback narrative, they access CAS2Net to read the Additional Feedback once informed by the supervisor or being alerted through a system notification.

After clicking on the blue "**Add Feedback**" button, supervisors see the page above where they select the employee for whom they have feedback. CAS2Net also lets the supervisor see a list of Trustee Employees (employees for whom they are the supervisor's trusted agent).

Select the employee's name and click "Save"

The supervisor will either enter Additional Feedback in the Supervisor 1 Feedback textbox, or for one or more factors.

When the feedback is complete, click on the "supervisor approval" tab to document the method of communication and the date it was communicated to the employee.

Note the error messages in red below the textbox if the supervisor tries to release to employee without a communication method and date of occurrence

Click "Release to Employee" when the Additional Feedback narrative is complete and has been communicated to the employee.
Click "Generate PDF" to produce a PDF file for the Additional Feedback

Even if the additional feedback has been released, the supervisor has the option to modify the narrative.
Click "**Modify**".

The Supervisor may update existing narratives and/or add narrative(s) against objectives and/or one or more factors.

When the feedback is complete, supervisors must enter a method of communication, date communicated and supervisor's name before releasing to the employee.

Supervisors also have the option to generate a printable/savable version of the Additional Feedback. Click "**Generate PDF**".

Click "**Release to Employee**" to complete the modification process.

CAS2Net will confirm, "Are you sure you want to release additional feedback to the employee? Click "**YES**"

Reports

Let's review the reporting functionality in CAS2Net

Supervisors access the Reports function from their supervisor menu under "REPORTS"

Click "REPORTS" and see the "Contribution Plan" button in blue

Click on "Contribution Plan"

Once the supervisor clicks on the blue "Contribution Plan" button, this screen displays the names of their employees

The supervisor can select one or several employees for whom to generate a contribution report.

Look at the left side of the slide: there is a "Select" box that you need to check in order to indicate that you want to generate a contribution report for that employee. Check the "Select" checkbox in the header row to select all employees.

Check "Select" to identify the Contribution Plans you want to print.
Then select "Continue" button.

Supervisor Reports: View or Save Options

Choose to "Open" and view the report or you can choose to "Save" or "Save as" to your computer.

The system generates the report: look at the bottom of your screen for the yellow prompt: you can choose to "open" and view the report or you can choose to "Save" or "Save as" to your computer.

We'll click "Open" to generate the report

This is an example of what a Contribution Plan looks like when generated from CAS2Net.

Your Employee Contribution Plan Report will display as a PDF, therefore you can view, save, or use save as if you want to select a folder and filename.

Our example is a 2-page report, page 1 is for one employee and page 2 is the Contribution Plan for another employee. We are displaying the first page of the report to illustrate the standard report view.

Employees generate their own reports from the "Reports" link in the Employee Menu

In this example, select the Contribution Plan to generate as a PDF report

Employees can only generate their own reports.

The PDF **Contribution Plan Report** displays:
- Effective Date of Contribution Planning
- Employee's Broadband Level, Occupational Series, Career Path and Expected OCS
- Supervisor's Name
- Method of Communication and Date Conducted
- Contribution Planning by Objectives or for each Factor

The PDF **Midpoint Assessment Report** displays:

- Year of Midpoint Assessment

- Employee's Broadband Level, Occupational Series, Career Path and Expected OCS

- Supervisor's Name

- Method of Communication and Date Conducted

- Contribution Planning by Objectives or for each Factor

- Supervisor's Midpoint Assessment for each Factor

Reports: Annual Assessment

The PDF **Annual Assessment Report** displays:

- Year of Annual Assessment'
- Employee's Broadband Level, Occupational Series, Career Path and Expected OCS
- Supervisor's Name
- Method of Communication and Date Conducted
- Contribution Planning by Objectives or for each Factor
- Employee's self-assessment
- Supervisor's Assessment for each Factor

The scores, compensation, and rating of record are documented on the Contribution-based Compensation and Appraisal System Salary (Basic Pay) Appraisal Form, Part I, and on the supervisor assessment in Part II. The CCAS Annual Appraisal (Parts I and II) will serve as the basis for individual discussions with the employees.

The PDF **Closeout Assessment Report** displays:

- Year of Midpoint Assessment
- Employee's Broadband Level, Occupational Series, Career Path and Expected OCS
- Supervisor's Name
- Method of Communication and Date Conducted
- Contribution Planning by Objectives or for each Factor
- Supervisor's Assessment for each Factor

The PDF **Additional Feedback Report** displays:

- Year of Midpoint Assessment

- Employee's Broadband Level, Occupational Series, Career Path and Expected OCS

- Supervisor's Name

- Method of Communication and Date Conducted

- Contribution Planning by Objectives or for each Factor

- Supervisor's Assessment Overall and for each Factor

Reports: Salary Appraisal Form

When the pay pool panel meets, they use the Compensation Management Spreadsheet (CMS) to assign payouts for each employee based on the employee's contribution relative to their current basic pay.

Results from the CMS are uploaded to CAS2Net to save the payouts for producing this form, the Part I: CCAS Salary Appraisal Form and for sending results to the Defense Civilian Personnel Data System to update basic pay and payout awards at the start of the new pay year.

Once the pay pool results have been approved and released by the Pay Pool Manager, the Salary Appraisal Form is available to the Supervisor.

The supervisor will then communicate the assessment and pay pool results to the Employee, and release to the Employee allowing them to view the Salary Appraisal Form.

THANK YOU

For more online CCAS training, go to http://acqdemo.hci.mil/training.html
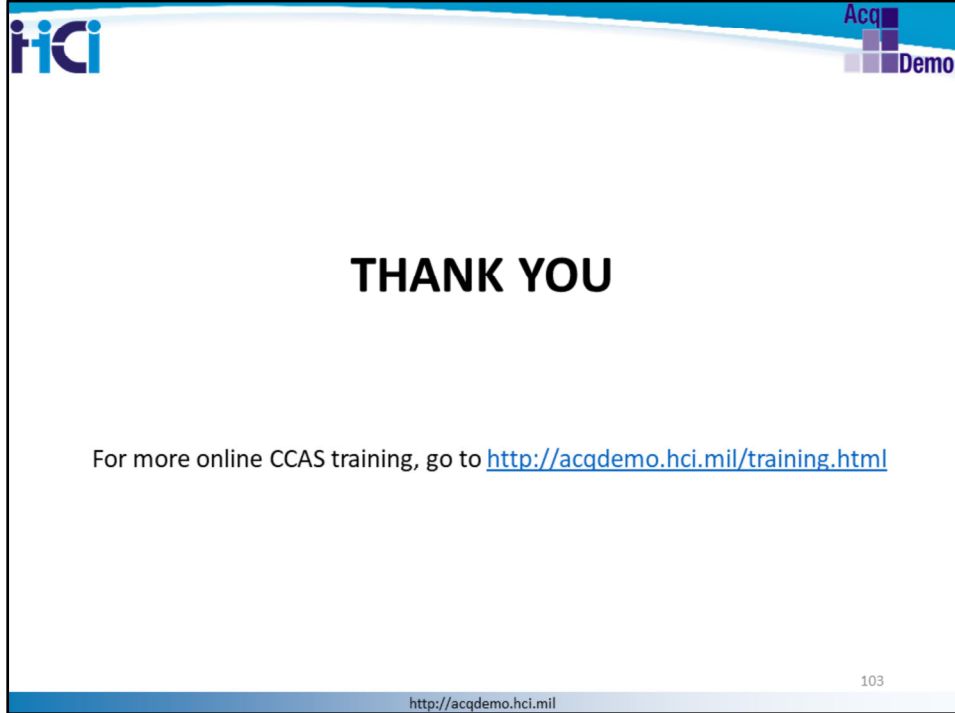
This completes the CAS2Net for Employee and Supervisor course.

For more online CCAS training, go to http://acqdemo.hci.mil/training.html.

Thank You!