MyPerformance

(DoD Performance Management and Appraisal Program)

Trusted Agent User Guide

May 6, 2016
Manage Trusted Agent Authorization

Introduction

1. **Manage Trusted Agent Authorization** allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the DoD Performance Management and Appraisal Program MyPerformance tool for employees they identify for the purpose of documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer's performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance, and the rating official or higher level reviewer retains ownership of the plan. The sole purpose of the trusted agent is to document their decisions in the employee's record. This assignment is accomplished in the 'Manager Functions' area of MyBiz+.

DCPDS Portal

1. To access **MyPerformance tool**, you must first log in to the **DCPDS Portal** at [https://compo.dcpds.cpms.osd.mil](https://compo.dcpds.cpms.osd.mil) using your **Smart Card** (CAC/PIV) or non-Smart Card (non-CAC User ID) and password. From there you will be directed to MyBiz+. **Performance Management and Appraisal** link is located in **Key Services**.

2. Log on with your **Smart Card** (CAC/PIV) or non-Smart Card (non-CAC User ID) and password using the applicable login button on the **DCPDS Portal** page. For Smart Card (CAC/PIV) users, make sure you select the non-email certificate.
Rating Officials (Managers and Supervisors) Accessing Manage Trusted Agent Authorization

1. From the MyBiz+ home page under Manager Functions in Key Services, select the Manage Trusted Agent Authorization link.

![Figure 3- MyBiz+ Home Page identifying Manage Trusted Agent Authorization](image)

2. You are now on the Manage Trusted Agent Assignments Page where you can assign one or more individuals to act on your behalf for documentation purposes.

![Figure 4 - Manage Trusted Agent Assignments Page](image)
Assigning Trusted Agent for Individual Employee

1. Once you have selected the program, a list of your employees in that program will display. Select employee or employees under the ‘Select’ column on the results table for whom you want to assign the trust agent authorization.

![Figure 7 - Manage Trusted Agent Assignments Page – Employee Selection](image)

2. The following fields are required: ‘Trusted Agent Name’ and ‘Start Date’. ‘End Date’ is an optional field. Enter ‘Trusted Agent Name’. Partial searches must begin with the first few characters of the search field followed by the %. The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the ‘Quick Select’ icon next to your selection.

![Figure 8 - Manage Trusted Agent Assignments Page – Trusted Agent Name](image)
2. Assign Trusted Agent and Terminate Trusted Agent section opens

![Image of Manage Trusted Agent Assignments Page - Assign Trusted Agent]

**Figure 12 - Manage Trusted Agent Assignments Page – Assign Trusted Agent**

3. The following fields are required: ‘Trusted Agent Name’ and ‘Start Date’. ‘End Date’ is an optional field. Enter ‘Trusted Agent Name’. Partial searches must begin with the first few characters of the search field followed by the % . The naming convention for full name is last name, first name, and middle initial. Once you have entered in name, select the magnifying glass. Select the ‘Quick Select’ icon next to your selection.

![Image of Manage Trusted Agent Assignments Page – Search and Select Trusted Agent Name]

**Figure 13 - Manage Trusted Agent Assignments Page – Search and Select Trusted Agent Name**

4. Enter ‘Start Date’ (date cannot be a past date). ‘End Date’ can be entered to limit the assignment period. If entered, the end date cannot be prior to the current date or the Start Date, whichever is later. Select Apply button.
7. To collapse this area, select **Hide Manage Assignment of Trusted Agent for Selected Employee(s)** link.

![Figure 17 - Manage Trusted Agent Assignments Page — Hide Manage Assignment of Trusted Agent](image1)

![Figure 18 - Manage Trusted Agent Assignments Page](image2)
Terminate Trusted Agent Authorization for Multiple Employees

1. To terminate trusted agent authorization for multiple employees, enter End Date.

2. Select the employees under the Select column to terminate trusted agent authorization. Note: End Date must be blank. Select Apply button.
3. Read the **Privacy Act Statement** and select the **Accept** button.

![Privacy Act Statement]

**Figure 25 - Privacy Act Statement**

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DCPDS Portal Login Page - Certificate Selection

![DCPDS Portal Login Page - Certificate Selection]

**Figure 24 - DCPDS Portal Login Page - Certificate Selection**

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2. You are now on the MyPerformance Main Page as the Trusted Agent.

![Figure 28 - MyPerformance Main Page as Trusted Agent](image)

3. Select the drop down arrow next to Trusted Agent to select the employee you are Trusted Agent for.

![Figure 29 - MyPerformance Main Page Trusted Agent](image)

4. You can select an Appraisal Year by selecting the drop down arrow next to Appraisal Year or leave as ALL. From this screen, you can create, update and/or view a performance plan/appraisal. You have the same responsibilities as the rating official.