



# GoMBC Supervisor Manual

VERSION 1.3. LAST UPDATED OCTOBER 10, 2022

The **Merit Based Compensation (MBC)** program manages LE Staff performance and provides an annual variable monetary reward based on an employee's individual performance and contribution to the mission. The reward employees receive is linked directly to their performance.

At the end of the performance period, the employee's demonstrated effort and contribution are assessed based on specific **performance criteria**.

Locally-employed staff with effective performance (defined as a **Total Performance Score** of 100 or more) receive a monetary reward aligned with their level of performance.

The program requires and supports supervisor and employee collaboration to set performance goals, improve skills, and find opportunities for professional development.

This manual covers GoMBC operation. For MBC policy, refer to the **Performance Management Policy for MBC**.

## GoMBC

GoMBC is the application that allows posts and missions to electronically process performance documents for **Locally-Employed staff (LE staff)**. This cloud-based application helps you manage the status of

- Employee Performance Reports (EPRs)
  - Annual Work Plans
  - Development Plans
  - Mid-Year Discussions
  - Scoring and Approval (at the end of the rating cycle)
- Probationary Period Certification
- Performance Improvement Plans (PIPs)
- Employee Appeals

The GoMBC app is managed by your local HR office. Your actions in GoMBC depend on your role. As a rating supervisor, you will use it to create performance documents, comment on and certify performance, and offer developmental support. As a reviewing supervisor or pool supervisor, you will review performance documents prepared by the rating supervisor.

- [Want to learn more about the MBC program? Talk to HR or see your post's \*\*LE Staff Handbook\*\*.](#)

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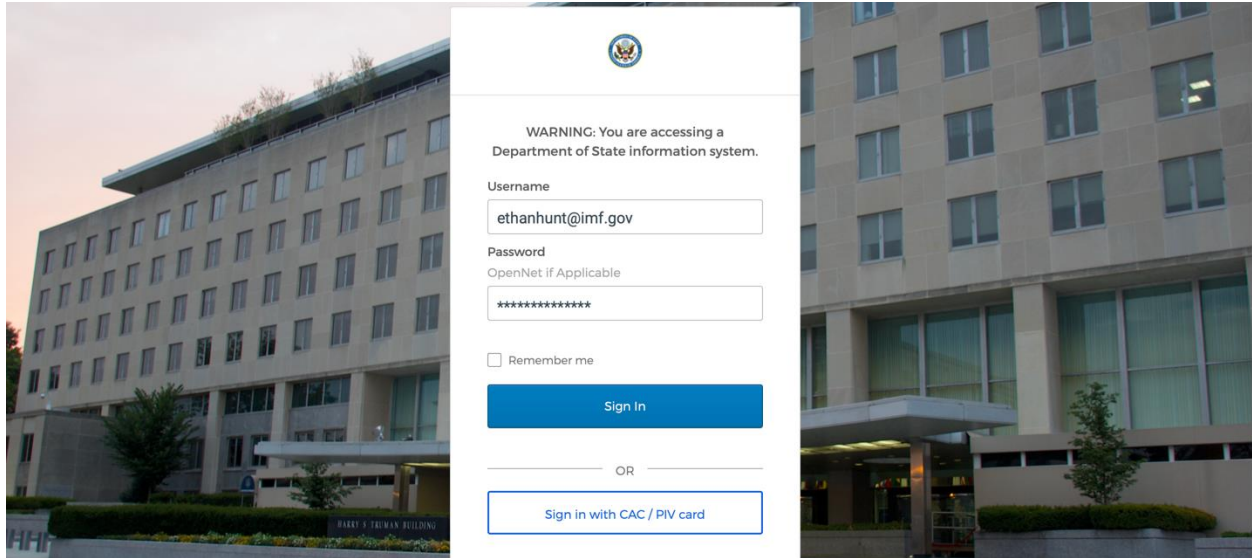
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## ACCESSING GoMBC

GoMBC is available online at [gombc.state.gov](http://gombc.state.gov)

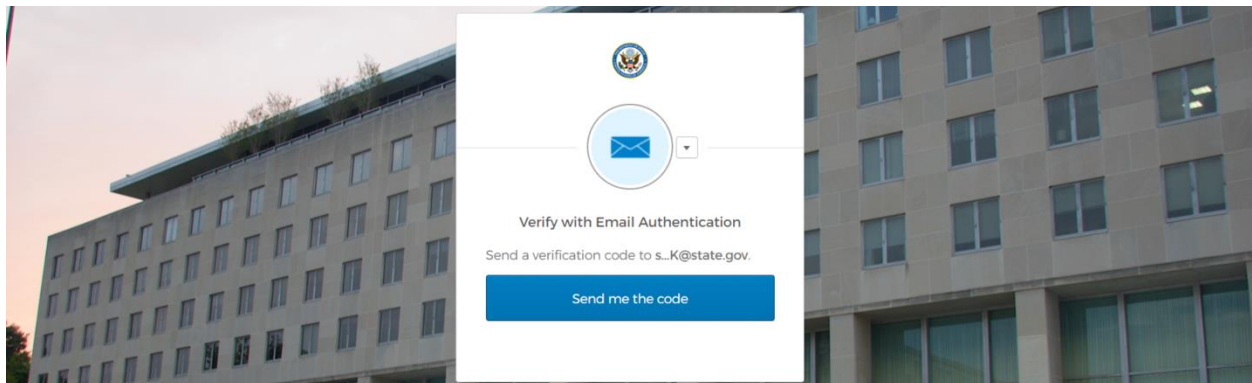
You can sign in from any web browser, but you will need to use an official government account (.gov or .mil) and may need to verify your identity.



## STATE.GOV ACCOUNTS

If you have a state.gov account, you can access GoMBC directly from an OpenNet computer using single sign-on. You won't need to verify your identity.

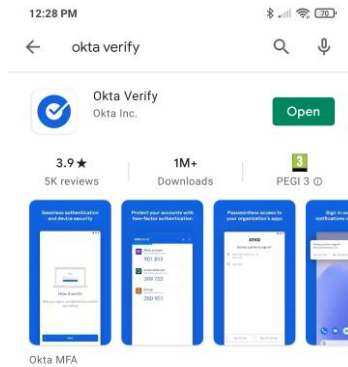
Not on OpenNet? Go to [gombc.state.gov](http://gombc.state.gov) and enter your DoS username and password. You'll be prompted to either send a verification code to your email account or enter a code from the Okta Verify app on your smartphone to confirm your identity.



- Using a CAC/PIV card? Instead of typing a username and password, you can **Sign in with CAC/PIV card**.

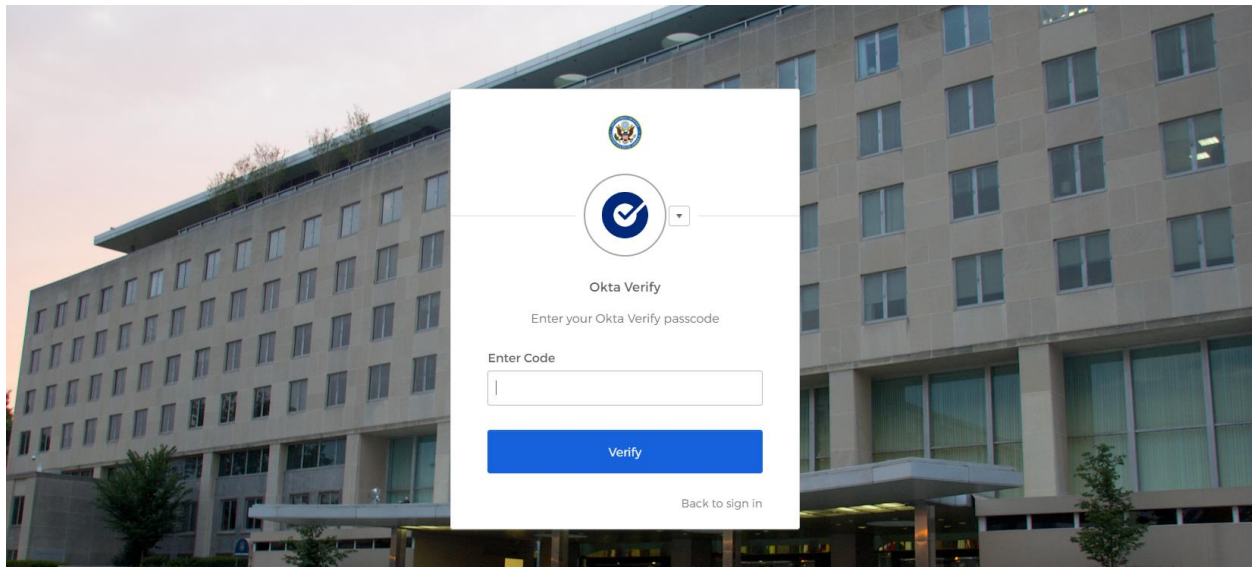
## OTHER GOVERNMENT ACCOUNTS

If you use a **Foreign Affairs Network (FAN)** account or another government agency account (one already enrolled in Okta), you will need the **Okta Verify** mobile app. This free app is available for iPhone and Android. Download it ahead of time from the Apple App Store or Google Play Store.



Get Okta Verify for iOS or Android.

Go to [gombc.state.gov](http://gombc.state.gov) and enter your FAN or agency username and password. Then, you will be asked to enter a code. Open the Okta Verify app on your smartphone, find the six-digit number for [login.state.gov](http://login.state.gov) and enter it into the website. Be quick—the number changes every 30 seconds.



## WELCOME TO GOMBC!

Once signed in, your browser will take you to GoMBC automatically. Read over the privacy notice before you [Log in](#).

First time here? If you're not an LE staff member you might be asked to register. If so, you will see the User Registration screen where you can enter your details. LE staff will be registered by HR and should not register.

Your completed registration will need admin approval. You will receive an email when everything's ready.

**User Registration** Back

User Name (login)  
Musgrave.J@state.gov

Name (Last Name, First Name Middle-Initial)  
Musgrave, John Q

Job Title  
Field Analyst

E-mail Address  
Musgrave.J@state.gov

Post  
01

Is Employee Local Staff  
 No

Register

- If you're not sure which account to use or have any other trouble getting into GoMBC, speak to your HR office at post.

## UNDERSTANDING ROLES

GoMBC uses **roles** to help people carry out tasks appropriate to their job. The role you hold in the app provides access to documents and actions corresponding to your role in the MBC process.

### EMPLOYEE

All LE staff hold this role. It provides them with access to their **Employee Performance Report (EPR)** (including the **Annual Work Plan**), and any pending **Performance Improvement Plans (PIPs)** or **Appeals**.

### RATING SUPERVISOR

This is usually the employee's immediate supervisor. The Rating Supervisor creates the **Annual Work Plan**, the **Development Plan**, documents the **Mid-Year Discussion**, and completes the **Employee Performance Report**.



## REVIEWING SUPERVISOR

The Reviewing Supervisor reviews each scored EPR completed by the **Rating Supervisor**. They may also review AWP's, PIP's, and Appeals as needed.

## POOL SUPERVISOR

The Pool Supervisor is a senior-ranking USDH accountable for a performance pool. They are the guardian of fairness and consistency. They make sure performance scores and written justifications on employee EPR's are consistent with performance for all employees in their performance pool.

## MISSION/POST HR ADMINISTRATOR AND MISSION/POST HR MANAGER

The Human Resources Officer (HRO) and HR staff administer the GoMBC application. They manage employee records and help supervisors complete performance documentation. HR approves and finalizes documents within GoMBC and provides training and consultation.

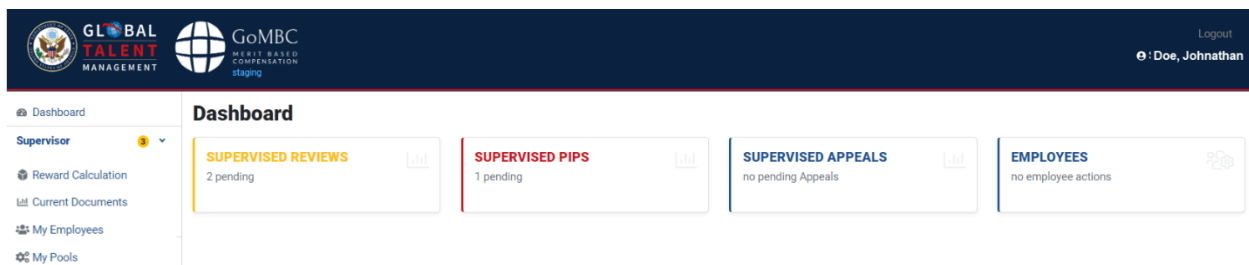
- A person may hold more than one role, depending on their job requirements.

## GETTING AROUND

GoMBC's main home screen is where you access all the documents and tools you need to complete the performance management process. This area includes the **Main Menu** for navigation and the **Dashboard** that summarizes any actions you need to take.

After logging in, you will arrive at the Home Screen. Up at the top is the name of your home location, or the one you last accessed. If you work across more than one location, make sure you're in the right place.

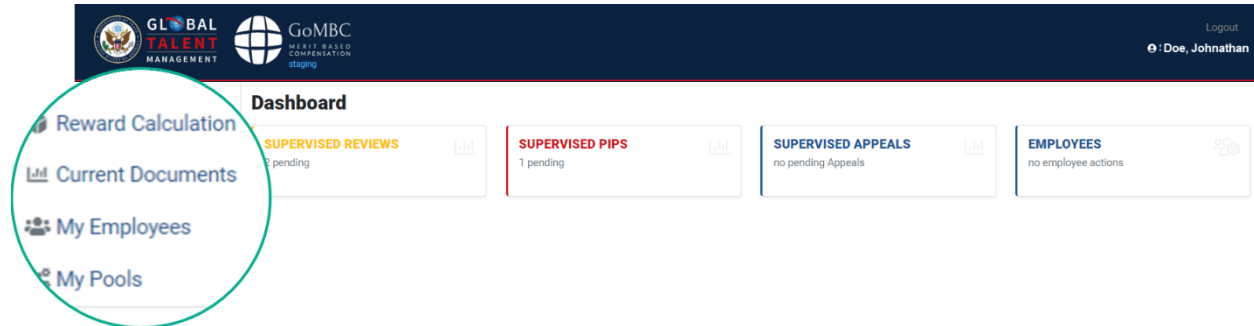
Exactly what you find here depends on the **roles** you hold in GoMBC.



GoMBC's home screen with main menu (left) and dashboard (right).

## MAIN MENU

Use the menu to navigate to documents, tasks, and your supervised employees for each role you hold.



The main menu has sections for each role you hold.

- Got actions to take? Menu headings for each of your roles are badged (like this: **3**) to let you know.

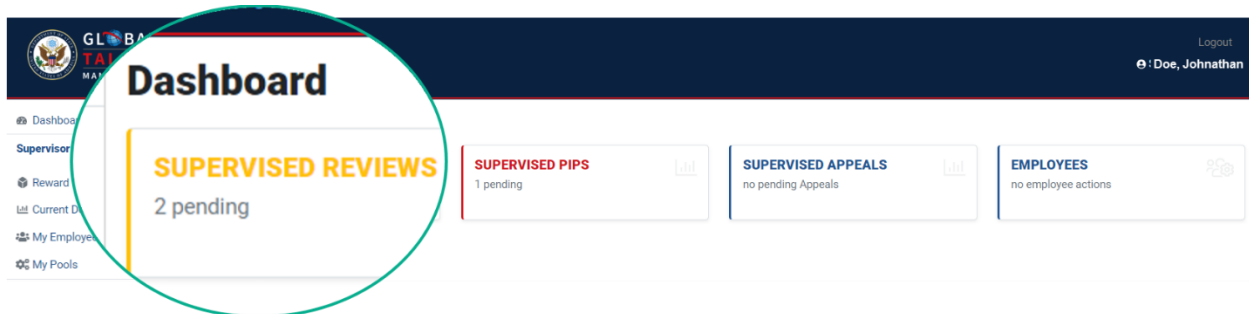
As a **Rating Supervisor**, **Reviewing Supervisor**, or **Pool Supervisor**, the menu takes you to all the performance documents for the employees you're assigned to in each role. These include **Annual Work Plans**, scored **Employee Performance Reports**, **Appeals**, and **Performance Improvement Plans**. From the menu, select [Current Documents](#) to find them. For a list of the employees you support, choose [My Employees](#).

As a **Pool Supervisor** the [My Pools](#) option directs you to any performance reports ready for review in your pool. Also available is [Reward Calculation](#), which allows you to approve calculations at the end of the performance year in the Reward Calculation module of GoMBC.

Some supervisors may have an additional [Acknowledgement Role](#) menu option if they supervise staff that have no official government email address. This option allows supervisors to enter and acknowledge the performance document on behalf of the employee. The employee must also sign a paper form and this signed copy must be retained.

## DASHBOARD

Think of the **dashboard** as your to-do list in GoMBC. Use it to keep track of your pending tasks. What you see here depends on the **roles** you hold.



The dashboard reports the outstanding tasks for each role you hold.

As a **Rating Supervisor**, **Reviewing Supervisor** or **Pool Supervisor**, your dashboard collates and links to the documents you are assigned to manage or approve. You will see whether any are **pending** your action.

**SUPERVISED REVIEWS** are the **Employee Performance Reports** you're assigned to create, edit, or approve.

**SUPERVISED PIPS** links you to **Performance Improvement Plans** for employees you support.

**SUPERVISED APPEALS** is where to find any **Appeals** lodged by employees you support.

**EMPLOYEES** gets you to the documentation and performance ratings for all employees you supervise.

## MANAGING DOCUMENTS

Navigate to all your **Current Documents** for this rating cycle from the **Main Menu** or by choosing a document category from the **Dashboard**.

This area organizes documents into **Reviews (EPRs)**, **Performance Improvement Plans**, and **Appeals**.

What you can do here depends on document type and status, and on your **role**.

Current Documents shows reviews, PIPs, and Appeals for the current performance year.

 This icon will alert you to documents that need attention.

## REVIEWS

This section holds current **Annual Work Plans (AWPs)** and **Employee Performance Reports (EPRs)**, showing summary data for each document. They will be available here until finalized by HR.

**Status** tracks the document's progress through the rating cycle and its approval process.

**Period** is the **Annual** (for the full rating cycle) or **Interim** period covered by the EPR.

**Employee** names the person this document is about.

**Start Date** and **End Date** mark the interval covered by the performance review.

**My Roles** lists the supervisory roles you hold for this employee.

**Actions** direct you to [View](#) the document and make updates when prompted or view the printable [JF-50D](#).

- You'll only see AWP's and EPR's for employees you support as a **Rating Supervisor**, **Reviewing Supervisor** or **Pool Supervisor**.

## PERFORMANCE IMPROVEMENT PLANS

This section lists any **Performance Improvement Plans (PIPs)** you may be working on.

**Status** tracks the plan's progress through the PIP process.

**Employee** names the person this PIP was created for.

**Start Date** and **End Date** mark the interval covered by the plan.

**Actions** direct you to [View](#) the plan and make updates or view the printable [JF-50B](#).

- All supervisors can view PIPs but only the **Rating Supervisor** can update them.

## APPEALS

If an employee lodges an **Appeal** against their scored EPR, you'll find it listed here.

**Status** tracks the document's progress through appeal process.

**Employee** names the person who lodged the appeal.

**Actions** direct you to [View](#) the appeal and make updates when prompted.

- Find documents faster using the **Global Filter** for each document type. Search for any listed criteria, such as employee name, document status, or your assigned roles.

## FINDING EMPLOYEES

Get a list of the people you support from the [My Employees](#) menu option or the [EMPLOYEES](#) section of your dashboard. This area shows all the employees you're assigned to as a **Rating Supervisor**, **Reviewing Supervisor**, or **Pool Supervisor**.

It lists each employee's name, grade, pool, position and section. You'll see your own assigned supervisor roles and the employee's **Total Performance Score** (when it's available).

The **Actions** you can take here depend on your **role** and the **status** of each document.

Name	Grade	Pool	Position	Section	My Roles	Total Score
EMPLOYEE, FIFTEEN	07	test	Test Employee	MANAGEMENT	Rating Supervisor	01/03/2022-01/03/2022 Score: 125
Employee, One	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-06/26/2022-08/05/2022 Score: NA
Employee, Two	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-01/30/2022 Score: NA 06/26/2022-08/05/2022 Score: NA 08/08/2022-01/02/2023 Score: NA

Find an employee from the main menu then select the appropriate action

- Find people faster when you search by name, position, grade, section or pool with the **Global Filter**.

## SUPERVISOR ACTIONS

[View AWP](#) directs you to the employee's current **Annual Work Plan**. Once the plan becomes an **Employee Performance Report**, this action updates to [View EPR](#).

[Employee's Current Documents](#) shows all reports, appeals or PIPs for the employee. From this view, select [Back](#) to return to the list.

[Initiate Annual Work Plan](#) creates a new AWP for your employee.

[History](#) is an archive of all documents previously completed for the employee.

[Initiate Performance Improvement Plan](#) opens a new PIP for the employee ready for you to fill out.

- You need to be a **Rating Supervisor** to create an AWP or PIP or see previously completed documents in GoMBC.

## DIVE INTO POOLS

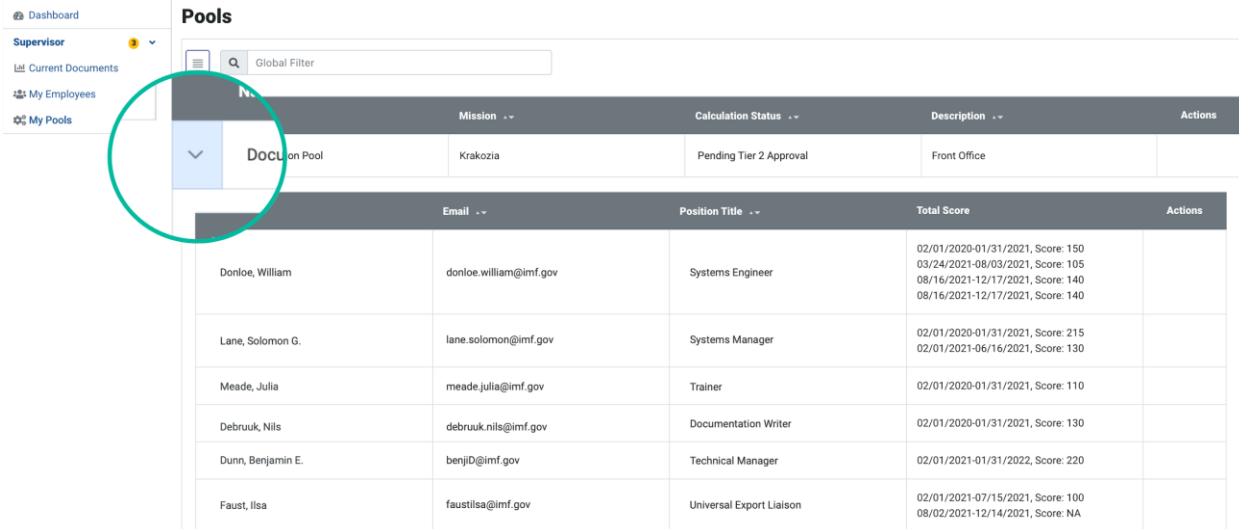
All eligible employees are grouped into **Performance Pools** used to calculate MBC rewards.

- **Rating Supervisors** and **Reviewing Supervisors** should not be placed in the same pool as employees they support.

For **Pool Supervisors**, visiting [My Pools](#) from the main menu brings up a list of performance pools you support.

You'll see each pool's name, mission, its status in the reward calculation status (provided by the **Reward Calculation Application** – a module of GoMBC), and the pool description.

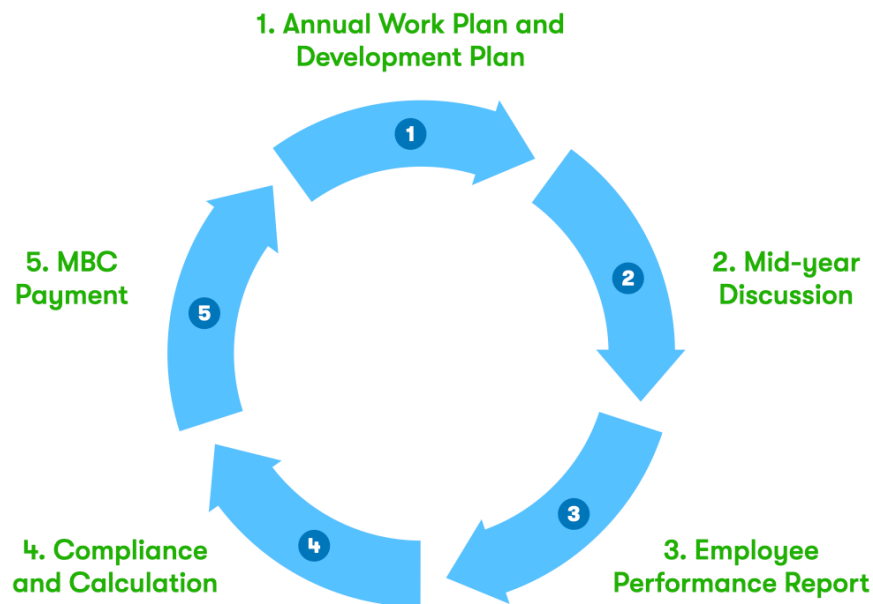
Hit the **Expand** control to see the pool's employees and their **Total Performance Score** (when available). You'll also be able to [View EPR](#) once it is ready for your approval.



Pools				
Global Filter				
	Mission	Calculation Status	Description	Actions
Docu Pool	Krakoza	Pending Tier 2 Approval	Front Office	
	Email	Position Title	Total Score	Actions
Donloe, William	donloe.william@imf.gov	Systems Engineer	02/01/2020-01/31/2021, Score: 150 03/24/2021-08/03/2021, Score: 105 08/16/2021-12/17/2021, Score: 140 08/16/2021-12/17/2021, Score: 140	
Lane, Solomon G.	lane.solomon@imf.gov	Systems Manager	02/01/2020-01/31/2021, Score: 215 02/01/2021-06/16/2021, Score: 130	
Meade, Julia	meade.julia@imf.gov	Trainer	02/01/2020-01/31/2021, Score: 110	
Debruuk, Nils	debruuk.nils@imf.gov	Documentation Writer	02/01/2020-01/31/2021, Score: 130	
Dunn, Benjamin E.	benjiD@imf.gov	Technical Manager	02/01/2021-01/31/2022, Score: 220	
Faust, Ilsa	faustilsa@imf.gov	Universal Export Liaison	02/01/2021-07/15/2021, Score: 100 08/02/2021-12/14/2021, Score: NA	

Pool Supervisors can find pools and their members under **My Pools**.

## THE MBC RATING CYCLE



Before we look at how to use GoMBC throughout the rating cycle, let's review the main activities of the cycle itself.

- Define **Performance Criteria** at the start of the cycle by creating an **Annual Work Plan**
- Reflect on and document performance during the cycle with a **Mid-Year Discussion**
- Evaluate performance at the end of the cycle by completing the **Employee Performance Report**.

After all EPRs are completed, HR staff will calculate and notify all eligible employees of their annual MBC monetary reward.

### DEFINING PERFORMANCE

When the rating cycle begins, you and your employee create an **Annual Work Plan (AWP)** and a **Development Plan** to set out the plan for the year ahead.

#### PERFORMANCE CRITERIA

These are the critical areas of performance your employee will be measured on during the rating cycle. The AWP defines performance criteria as:

- Continuing Responsibilities (mandatory)
- Specific Objectives (optional)
- Competencies (optional)
- Universal Job Elements (mandatory)



You will create 6—20 performance criteria and decide the importance of each for the performance period ahead. You should hold a discussion with your employee about these criteria at the start of the rating cycle.

#### DEVELOPMENT PLAN

You and your employee will schedule some activities to help the employee grow in a specific professional area. Activities are recorded in the **Development Plan**.

- You must schedule **at least one development activity** such as coursework, skills training, work shadowing or self-guided reading.

#### REFLECTING ON PERFORMANCE

Mid-way through the performance period (of either an **interim** or **annual** EPR), you will hold a formal discussion with your employee to see how things are going. Use this **Mid-Year Discussion** to get feedback on progress toward their **Performance Criteria**, make any adjustments, and talk about their accomplishments and challenges.

#### EVALUATING PERFORMANCE

At the end of the rating cycle, you will look at how well the employee has achieved the defined goals of the set **Performance Criteria**. When you first collaborated on the AWP, these criteria were balanced out, applying a **percentage weight** (5—20%) to each.

Now you need to add a rating level (0—3) to each criterion based on performance. GoMBC automatically calculates the **Total Performance Score (TPS)** by multiplying each rating level by the percentage figure to get the performance criterion score. Then, adding all performance criterion scores to reach the TPS.

- Want to learn more about MBC reward eligibility? Talk to HR or review the **Performance Management Policy for MBC**.

## ANNUAL WORK PLAN

As a **Rating Supervisor**, you will use GoMBC to create an **Annual Work Plan (AWP)** for each of your employees.

From the main menu, select **My Employees** to see a list of everyone you support, or search for an employee by name.

This shows each employee's position, grade, pool, and section, along with icons for different actions you can take. The one you want is **Initiate Annual Work Plan**.

The screenshot shows the 'My Employees' page in the GoMBC system. The page header includes the logos for Global Talent Management, GoMBC Health Based Compensation, and Krakoia. The user is identified as 'Hunt, Ethan W.' with a 'Logout' link. The main content area is titled 'My Employees' and features a search bar labeled 'Global Filter'. Below the search bar is a table with the following columns: Name, Grade, Pool, Position, Section, My Roles, and Total Score. The table lists two employees: Mitsopolis, Alanna (Grade 11, Pool Regional IM, Developer, EXEC, Rating Supervisor) and Lane, Solomon G. (Grade 13, Pool 2, Money Maker, ECON, Pool Supervisor). The 'Total Score' column for Mitsopolis, Alanna shows a score of 'A' with a date range of 02/01/2021 to 01/31/2022. The 'Actions' column for Mitsopolis, Alanna contains a button labeled 'Initiate Annual Work Plan' with a plus icon. A red circle highlights the 'My Employees' menu item in the left sidebar, and another red circle highlights the 'Initiate Annual Work Plan' button in the 'Actions' column.

Find an employee from the main menu then select the appropriate action

## INITIATING THE AWP

There are a few details to fill out before creating an AWP.

### Initiate Annual Work Plan

Back

For: Mitsopolis, Alanna

Only the **Interim review dates can be modified**. When **Annual review period** is selected, **dates are automatically populated from the mission profile**. The Review period duration **must be longer than 30 days**. Existing review dates are prepopulated.

Review Period

Select a Value

Performance Year

2021-2022

Review Period Date Range

02/01/2021 - 01/31/2022

Is in Probationary Period

No

Copy From

Select a Value

Cancel

Initiate

Fill out these fields to initiate the Annual Work Plan.

## REVIEW PERIOD

This refers to how long you will supervise the employee. If you're supporting them throughout the entire performance year, pick **Annual**. If you're planning to support them through part of the year (for example, if you're due to depart post), pick **Interim**.

- If you choose **Interim**, you will be asked to give a reason.

## PERFORMANCE YEAR

Choose between the current performance year or if needed, the previous.

## REVIEW PERIOD DATE RANGE

If you chose an **Annual** review period, the correct date range is filled out automatically based on the cycle set by your mission. For **Interim**, fill out the dates covering your time as the employee's supervisor.

## PROBATIONARY PERIOD

This refers to the employee's probation. If they are a new hire, you will likely set this to **Yes**.

## COPY FROM (EXISTING EMPLOYEE INFO)

If this AWP is going to be similar to a previous one (either from the same employee, or someone else you support as a **Rating Supervisor**) then save yourself some time and copy from a previous record.

This copies over all the **Performance Criteria** from an existing AWP to get you started. You can edit these later. You can only copy from an AWP or EPR for which you were a rating supervisor.

Once that's all done, select **Initiate** to create the AWP template.

## FILLING OUT THE AWP

You've now created the **Annual Work Plan**, but it's still mostly empty. In the next step, you will add some employee details and set criteria for the new performance period.

You should now be looking at the AWP template for your chosen employee. Their name (and yours) is at the top of the form, along with the names of other supervisors who'll later approve the scored EPR.

The **Review Period** and **Date Range** carry over from the previous step.

The screenshot shows the 'Annual Work Plan (AWP)' form for an employee named Mitsopolis, Alanna. The form is titled 'Annual Work Plan (AWP)' and includes a 'View JF-50D form' button. The 'Employee Data' section contains the following information: Employee name: Mitsopolis, Alanna; Status: AWP Created; Reviewing Supervisor: Donloe, William; Rating Supervisor: Sloane, Erica; Pool: Pool Regional IM; Pool Supervisor: Brassel, Theodore K. Below this is a note: 'Dates are automatically populated from mission profile. Existing review dates are marked.' There is a dropdown menu with the text 'Only Interim review dates can be modified. When A...'. The 'Review Period' section has a dropdown menu set to 'Annual'. The 'Date of Position Description' field is empty, and there is a checkbox for 'Is Position Description accurate?' which is currently unchecked. The 'Probationary Period' section has a text box for 'Rating Supervisor documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.' Below this are fields for 'Start Date' and 'End Date', both of which are empty.

The initiated AWP with employee data and an option to print the JF-50D form.

- At any time, you can see the AWP as an official JF-50D form, ready for printing. Just select **View JF-50D form** to switch your view.

## CONFIRMING JOB DETAILS

If the employee is on probation, add the start date of their **probationary period** and GoMBC will work out the correct end date. As a **Rating Supervisor** you will later be asked to certify whether the probationary period has been completed successfully. If you are unsure, speak to your HR office.

## DETAILS OF THE ANNUAL WORK PLAN

Now let's set up the **Performance Criteria** that you and your employee have discussed and agreed on. Remember, each can be labeled as either a **Continuing Responsibility**, **Specific Objective**, or **Competency**. Don't worry about **Universal Job Elements** right now—they get added automatically.

- The AWP must have 6—20 performance criteria including **Continuing Responsibilities** and **Universal Job Elements**.

Select [Add Performance Criterion](#) to add your first goal to the AWP. Select a category, then give the objective an appropriate **name** and a **description**.

Give the performance criterion a **percentage** weight (5—20%) based on its overall importance during the performance period.

As soon as a performance criterion has a **name**, **description**, and **percentage** it gets saved automatically, along with any edits you make.

Continue adding more criteria in the same way by selecting [Add Performance Criterion](#) and picking a category.

As you add performance criterion the **Total Percentage** weight increases. This total includes percentages for **Universal Job Elements**.

When the percentage weight reaches 100, you will no longer be able to enter new performance criteria. If you want to add additional criterion, you will need to adjust the weight first.

Create a new performance criterion by first selecting its type.

#### UNIVERSAL JOB ELEMENTS

These criteria are set automatically for each employee. As a **Rating Supervisor**, you will decide how each should be weighted toward overall performance.

Speak to HR for more information on how best to weight these performance criteria.

## DEVELOPMENT ACTIVITIES

Support your employee's performance and professional growth by adding activities to their **Development Plan**.

Select [Add Development Activity](#) and then enter a title for the development area, a description of the recommended activity, and dates of when the activity should happen.

The screenshot shows a 'Development Plan' interface. At the top, there is a header 'Development Plan' and a sub-header 'List training activities for the rating period/cycle (e.g. classroom or on-line coursework, distance learning, and individual development efforts such as on-the-job-training and self-guided reading)'. Below this is a table with one row. The table has columns for 'Development Activity', 'Start Date', and 'End Date'. The 'Development Activity' column contains the text 'Complete the official GoMBC training for'. The 'Start Date' and 'End Date' columns both contain '03/30/2021'. Below the table is a 'Delete' button. At the bottom of the interface is a blue button labeled 'Add Development Activity'.

- You must add **at least one development activity** such as coursework, skills training, work shadowing or self-guided reading.

Like before, each activity is saved automatically along with any edits you make. Use [Add Development Activity](#) again to complete as many activities as you need.

## CONFIRMING THE AWP

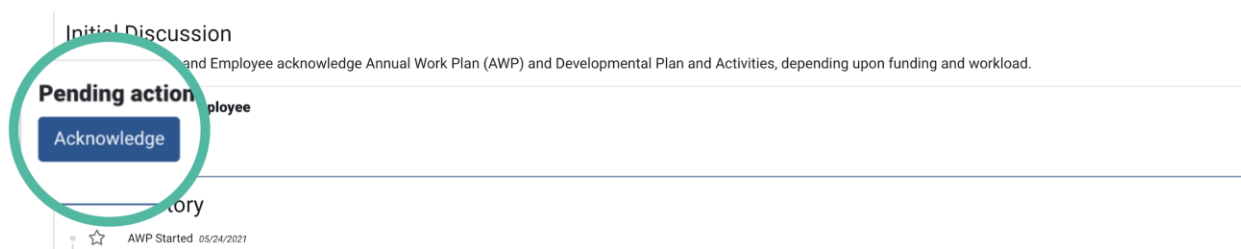
Now that you've created an **Annual Work Plan** and discussed it with your employee, it's time to make it official.

As the **Rating Supervisor**, go ahead and [Endorse](#) the plan. Selecting this will notify your employee that the AWP is ready for their acknowledgement in GoMBC.

The screenshot shows the 'Initial Discussion' section of the Annual Work Plan interface. The title is 'Initial Discussion'. Below the title is the text 'Rating Supervisor and Employee acknowledge the Annual Work Plan (AWP) and Developmental Plan and Activities, depending upon funding and workload.' Below this text is a section titled 'Pending action by Rating Supervisor'. At the bottom of this section is a blue button labeled 'Endorse'.

As the Rating Supervisor you should Endorse the completed AWP.

The employee will now [Acknowledge](#) their agreement in GoMBC, and the rating cycle is officially underway.



Employees are notified to Acknowledge their AWP.

- [Make sure to discuss the AWP with your employee before you Endorse it.](#)

## CHECKING AWP STATUS

Employees, their supervisors, and HR staff can all track the status of an AWP. The **Status History** follows every update to the document, showing who did what.

## Status History

- ☆ AWP Started 03/30/2021
- ✓ Endorsed by Rating Supervisor **Sloane, Erica** 03/30/2021
- ☆ AWP Created 03/30/2021

Status History updates to show each recorded action on the AWP.

## UPDATING THE AWP

You can make changes to the AWP in a defined time frame before the end of the review period closes. Speak to your local HR if you have questions.

Locate your employee's **Annual Work Plan** by selecting [Current Documents](#) or [My Employees](#) from the main menu. The **Action** you want is [View AWP](#).

From here you can add or remove **Performance Criteria** and adjust percentage weightings.

The employee will receive an email when changes are made to the AWP and will be asked to review the AWP again.

## RECORDING PERFORMANCE NOTES

At any point throughout the year, **Performance Notes** can be recorded and saved to document anything that is pertinent to the employee's performance or may be useful when completing the EPR at the end of the rating cycle. This field can be modified until the [Start EPR](#) button is selected, after the MYD has taken place. The content will be placed in section 8 of the JF-50D, but will not be visible to the employee until the EPR is released to them after all approvals, which is also when they will see their score for the first time.

- Make sure to discuss any changes to the AWP with the employee first

## ACKNOWLEDGE ON BEHALF OF THE EMPLOYEE

When an LE Staff employee does not have access to an official Government account, a supervisor can be assigned the employee acknowledgement role (EAR) to facilitate the processing of MBC documentation within GoMBC. Performance documents should be printed and physically signed by employees, then the supervisor will 1) upload the signed document into GoMBC, 2) record the LE Staff's signature in GoMBC for the task corresponding to the signed hard copy received and uploaded, and 3) submit the signed hard copy to HR for placement into the LE Staff's Employee Performance File (EPF).

Each employee can have a maximum of one EAR (supervisor) assigned for them at a time. The EAR assignment can be changed during the rating cycle. A supervisor can have an EAR for multiple employees. HR staff will setup the EAR for the supervisors.

Once the rating supervisor endorses the AWP or MYD or releases the EPR to the employee, the general rating supervisor process for employees with the EAR is as follows. Please remember that for the end-of-performance period rating process, step 1 should only take place after all supervisors and HR have approved the document.

1. Rating supervisor prints the form
2. Rating supervisor asks employee to physically sign the document
3. Rating supervisor uploads the signed document and provides the original to HR
4. Rating supervisor, using the Acknowledgement Role menu, signs in as the employee and acknowledges

### STEP 1: RATING SUPERVISOR PRINTS THE DOCUMENT

If establishing/updating the AWP or indicating that the MYD was held, the rating supervisor can print the document immediately after step 1. If endorsing the rating, the rating supervisor



should only print the document after all supervisors and HR have approved the document and it has been returned to the rating supervisor for release to the employee.

To print the document, first select the [View JF-50D form](#) button at the top of the document.

## Annual Work Plan (AWP) for Locally Employed Staff

[View JF-50D form](#)

Then, select [Print](#).

## Review

[Print](#)

### STEP 2: EMPLOYEE PHYSICALLY SIGNS THE FORM

Outside of the application, the rating supervisor will ask the employee to physically sign the appropriate section (section 3 for AWP acknowledgement, section 4 for MYD acknowledgement, and section 6 for end of performance period acknowledgement). The rating supervisor will then scan the document. The rating supervisor will need to save this scanned document and also give the original to HR for filing in the employee's EPF. (Do not save the document on a public or shared drive!)

### STEP 3: RATING SUPERVISOR ATTACHES THE SIGNED DOCUMENT IN GOMBC

The rating supervisor will add the signed document to the performance record in GoMBC by following the steps below.

1. Open the review in GoMBC, scroll down to the Attachments section, then select [Add New File](#)

#### Attachments

Official performance-related documentation is documentation that was provided to the employee and included in the Employee Performance File (EPF). You may not attach (or reference in the EPR) any unofficial performance-related documentation that was not provided to the employee and not included in the EPR, such as email exchanges between Rating Supervisor and employee, Rating Supervisor's personal records of informal counseling sessions, or other personal notes.

[Add New File](#)

2. Select the document type (Signed AWP, Signed MYD, Signed EPR, or Other), find the file that you scanned in step 3, and select Save.

## New File

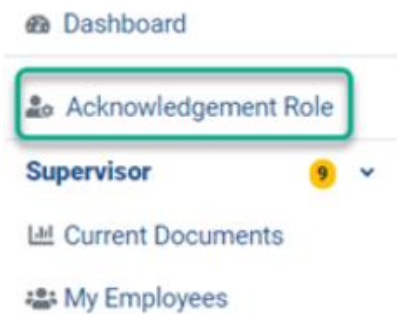
Document Type

### STEP 4: RATING SUPERVISOR ACKNOWLEDGES THE DOCUMENT ON BEHALF OF THE EMPLOYEE

Using the Employee Acknowledgment role, the rating supervisor will acknowledge the document on behalf of the employee by completing the following steps:

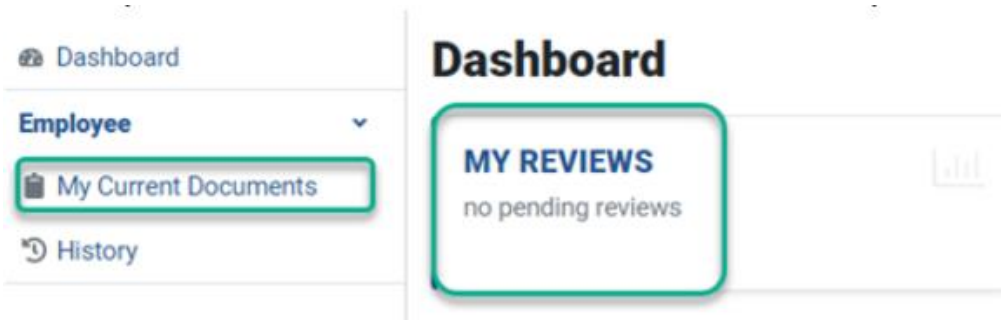
1. Select the [Acknowledgment Role](#) menu item from the left hand menu



2. Select the [Act on Behalf of Employee Acknowledgement Role](#) icon to sign in as the employee. If you do not have this icon and you have a red icon in the form area, please contact your HR office as your role has not been fully setup.

Form	Name	Post	Employee Acknowledgement Role Name	Start Date	End Date	Actions
	Employee, One	Cairo	Supervisor, Two	01/03/2021		

3. Select [My Current Documents](#) from the left hand menu or the [My Reviews](#) Dashboard item




4. Select the [Edit](#) icon for the document you would like to acknowledge

**Current Documents** Back

**Reviews**

Global Filter

Status	Period	Rating Sup.	Start Date	End Date	Actions
MYD Held	Interim	Supervisor, Two	01/03/2021	04/08/2021	

5. Scroll down and select [Acknowledge](#). The acknowledgement will be clearly marked with 'on behalf of' in the Status History and on all documentation (Ex. JF-50D printouts).

**Pending action by Employee**

Employee, One

Add a comment...

[Acknowledge](#)

## MID-YEAR DISCUSSION

Closer to the middle of the rating period, you will schedule a discussion with your employee to talk about their performance toward the **Performance Criteria** set out in the **Annual Work Plan (AWP)**.

The **Mid-Year Discussion (MYD)** helps you both comment on performance so far and make sure the criteria set out in the AWP are still appropriate. If adjustments are needed, this is the time to discuss and update the document. Per policy, all rated EPRs, or all EPRs covering at least 120 days, require a MYD.

## UPDATING THE AWP

From the main menu, select [My Employees](#) to see a list of everyone you support, or [Current Documents](#) for a list of all pending documents.

Find the employee or document you would like to work with and select [View AWP](#).

The screenshot displays the 'My Employees' page in the GoMBC system. The header includes the Global Talent Management and GoMBC logos, along with a 'Logout' button and the user role 'Pool Supervisor'. The sidebar menu is highlighted with a red circle, showing 'Current Documents', 'My Employees', and 'My Pools'. The main content area features a table with the following data:

Name	Grade	Pool	Position	Section	My Roles	Total Score
EMPLOYEE, FIFTEEN	07	test	Test Employee	MANAGEMENT	Rating Supervisor	01/03/2022-06/05/2022-11 Score: 125 Score: NA
Employee, One	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-06/03/2022 Score: NA

A red circle highlights the 'View AWP' button in the action column of the first row.

Find an employee from the main menu then select the appropriate action

This brings up the employee's **Annual Work Plan**. Use this to frame your conversation, providing feedback on their performance across all performance criteria.

You won't record any performance rating scores yet, but if needed you can adjust the description or weighting of each **Performance Criterion**.

### ADDING NEW OBJECTIVES

Select [Add Performance Criterion](#) to create any further items, adding a **title**, **description** and **weighting** for each.

- You can't add new performance criteria if the percentage total is 100%. First remove or adjust the weight of existing items.

Annual Work Plan  
 Add Performance criterion and Narratives Justifying Each Criterion's Rating.

Maximum of 6 and Maximum of 20 Performance Criteria, including: Continuing Responsibilities (mandatory), Specific Objectives, Competencies, and Universal Job Elements (mandatory). All criteria require a description.

Percentage: 95% Total Points: 0

**Continuing Responsibility**

Type: Continuing Responsibility Name: Submit weekly intelligence reports Percentage: 10

Description: Report and summarize...

Specific Objectives

Title	Name	Description

Adjust the number and weighting of performance criteria as needed.

This is also a good time to review the employee's **Development Plan**, adding new activities to help them meet their goals. Select [Add Development Activity](#) and then enter a title for the development area, a description of the recommended activity, and dates of when the activity should happen.

#### RECORDING PERFORMANCE NOTES

At any point throughout the year, **Performance Notes** can be recorded and saved to document anything that is pertinent to the employee's performance or may be useful when completing the EPR at the end of the rating cycle. This field can be modified until the [Start EPR](#) button is selected, after the MYD has taken place. The content will be placed in section 8 of the JF-50D, but will not be visible to the employee until the EPR is released to them after all approvals, which is also when they will see their score for the first time.

#### CERTIFYING THE MID-YEAR DISCUSSION

Following your conversation and any changes to the AWP, it's time to certify the document. You still need to do this even if the AWP remains unchanged.

You must add comments to summarize your mid-year discussion and select [Endorse](#). This updates the **Status History** to record that the discussion happened. GoMBC then notifies your employee to [Acknowledge](#) the discussion and any changes to the AWP. If you need to acknowledge on your employee's behalf, follow the instructions in **Acknowledge on behalf of the employee**.

- MYD comments are mandatory but you're free to update them later. Just **Endorse** any changes you make and GoMBC will prompt the employee to **Acknowledge** them.

### Mid-Year Discussion and Certification

**Pending action by Rating Supervisor**

Great work s

...king forward to the rest of the year.

Endorse

...story

## EMPLOYEE PERFORMANCE REPORT

At the end of the performance period, you and your employee will check in again to formally assess performance. As the **Rating Supervisor**, you will need to **score** each of the **Performance Criteria** set out in the **Employee Performance Report (EPR)**.

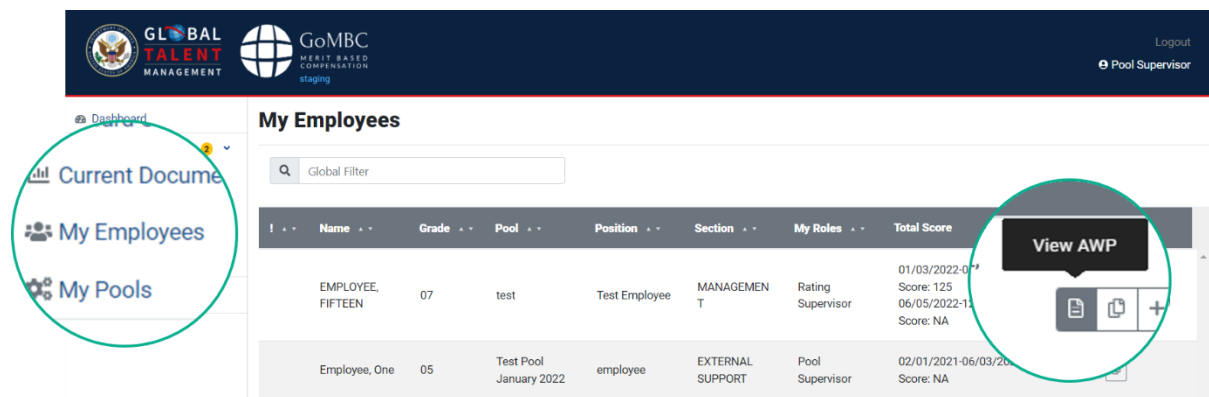
Following your endorsement, it will be approved by the **Reviewing** and **Pool Supervisors** before passing to HR for final review and release to the employee by the **Rating Supervisor**. The **Total Performance Score** recorded on the EPR is then used to calculate the employee's MBC reward.

Each of the **Performance Criteria** is scored from 0—3. For a full rundown on the rating scale, see the **LE Staff Handbook, Performance Management Policy for MBC**, or ask your local HR.

- The employee must have been in their job for 120 days with the same Rating Supervisor before their performance is scored.

## STARTING THE REVIEW

Return to your employee's **Annual Work Plan** by selecting **Current Documents** or **My Employees** from the main menu.



The screenshot shows the GoMBC Supervisor Manual interface. The top navigation bar includes the Global Talent Management and GoMBC logos, along with a 'Logout' button and the user's role 'Pool Supervisor'. The main content area is titled 'My Employees' and features a search filter. Below the search filter is a table with the following columns: Name, Grade, Pool, Position, Section, My Roles, and Total Score. The table contains two rows of employee data. A red circle highlights the 'View AWP' button next to the first employee row.

Name	Grade	Pool	Position	Section	My Roles	Total Score
EMPLOYEE, FIFTEEN	07	test	Test Employee	MANAGEMENT	Rating Supervisor	01/03/2022-06/05/2022-11 Score: 125 Score: NA
Employee, One	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-06/03/2022 Score: NA

The AWP should look just as you left it after the **Mid-Year Discussion**. Before you start scoring the EPR, review the Performance Notes as these can no longer be edited once the process is started. When you are satisfied with the changes, select [Start EPR](#) (at the end of the form) to begin adding ratings and justifications.

Mid-Year Discussion and Certification

**Optional action by Rating Supervisor**  
Atherton, Michael

Great work so far. Looking forward to the rest of the year.

Update MYD (revision(s))

**Start EPR**

MYD Acknowledged: 05/24/2021

## ADDING RATINGS

- You can only start scoring the EPR after the **Rating Supervisor** and **Employee** both acknowledge the MYD.

Check over the document to make sure the details are correct. As the **Rating Supervisor**, you first need to record when the employee's position description was last classified. Enter a date in the Date of Position Description box and confirm whether the position description is accurate.

- Ask your local HR for a copy of the **Position Description** or advice on updating its contents.

In the Annual Work Plan section, find the employee's Continuing Responsibilities, Specific Objectives, Competencies, and Universal Job Elements.

Add a **Score** (0–3) to each of these criteria and provide a written **Justification** for your score. Make sure to include specific examples to illustrate your decision. Your updates are saved automatically. Once you [Endorse](#) the EPR, your scores are shared with the **Reviewing Supervisor**, **Pool Supervisor**, and **HR**.



Employees won't see ratings until the EPR is fully approved and released to them by the Rating Supervisor.

**Annual Work Plan**  
Annual Work Plan and Narratives Justifying Each Criterion's Rating.

Annual Work Plan consists of **Minimum of 6** and **Maximum of 20** Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All Ratings (0, 1, 2, 3) require written justification.

**Continuing Responsibilities**

Submit weekly intelligence reports	Percent: 10 %
Summarize briefings for DCM	
Score	Justification
<input type="text" value="2"/>	Reports consistently delivered on time and cited as highly effective. New digital distribution methods and archiving exceeded expectations.

**Specific Objectives**

Deliver GoMBC training	Percent: 15 %
Conduct training sessions on GoMBC for Supervisors	
Score	Justification
<input type="text" value="3"/>	Excellent training program delivered to all eligible staff, including development of reusable materials and scheduling of sessions. Excellent work!

• Scores and justifications are **required** for all Performance Criteria.

Activities listed in the **Development Plan** are not scored. You should still use this space to certify completion of development activities throughout the rating period.

## CERTIFYING THE EPR

With all your scores and justifications now in, it's time to start the certification process. Here's what happens next.

1. As the **Rating Supervisor**, you can choose to enter an optional overall narrative of the employee's performance in the comment box. This text will appear to the employee immediately in the Status History and in the JF-50D. You will then **Endorse** the EPR.

**End of Rating Period/Cycle Certification**  
Signatures confirm that Rating Supervisor and Employee have discussed the contents of the AWP at the end of the rating period/cycle. Employee's signature does not necessarily constitute agreement with the rating.

**Pending action by Rating Supervisor**

Overall excellent performance this year.

EPR certification begins when the Rating Supervisor selects **Endorse**.

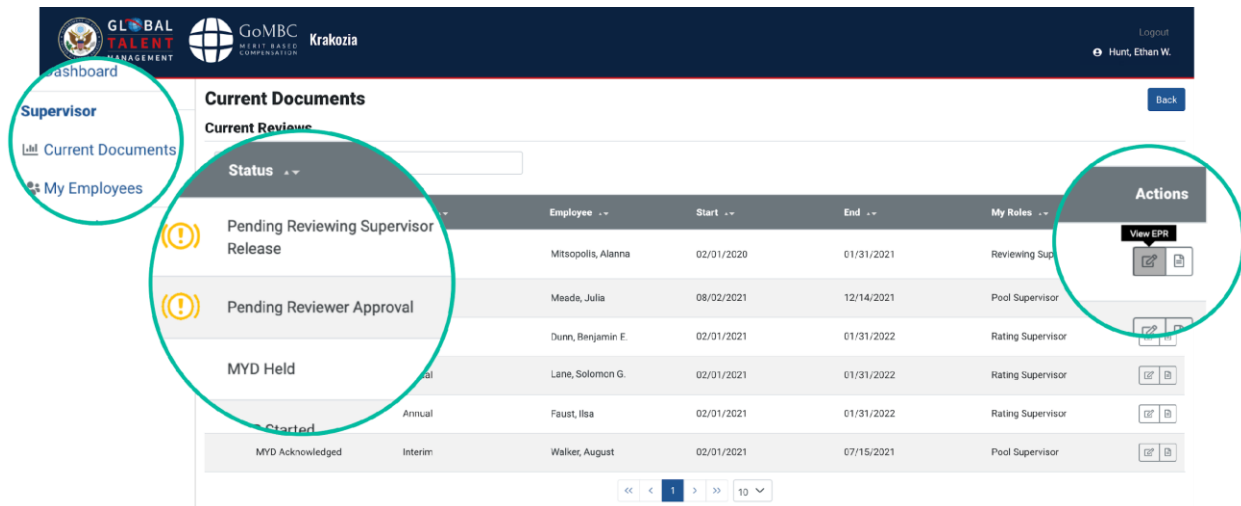
2. The **Reviewing Supervisor** is notified by email of each performance report endorsed by the **Rating Supervisor**.
3. The **Reviewing Supervisor** checks the EPR. If all looks good, they **Approve** it. If they disagree with any ratings or justifications, they can **Return** it to the **Rating Supervisor** for changes. Any comments made by the reviewing supervisor can be seen by the employee in the Status History and section 9 of the JF-50D. Approved documents are then passed to the **Pool Supervisor**.
4. The **Pool Supervisor** reviews every EPR in a performance pool. As before, they can **Approve** each document as final or **Return** it with feedback to the original **Rating Supervisor**. Any comments made by the reviewing supervisor can be seen by the employee in the Status History and section 9 of the JF-50D. Each EPR they approve is passed to **HR**.
5. **HR** will check all documents for inadmissible comments and either **Approve** or **Return** to the **Rating Supervisor** with their own comments.
6. With the EPR now certified by all supervisors, the **Rating Supervisor** takes action to Release the document to the **Employee** who sees their rating for the first time. They have up to 5 business days to add their own comments and either **Acknowledge** the EPR or start an **Appeal**. If they do not take action within 5 business days, the application will automatically acknowledge on their behalf.
7. If the employee adds comments to their acknowledgement, the EPR is sent back to the **Rating Supervisor** for comment review. The rater can view and **Proceed** to send the EPR to HR.
8. Finally, HR finalizes the EPR. The final **Total Performance Score** is used to calculate the employee's MBC reward.

#### REVIEWING AND POOL SUPERVISORS


As a **Reviewing Supervisor** or **Pool Supervisor**, you will move the certification process forward by acting on EPRs that need your review.

Use the **Dashboard** (or go to **Current Documents** from the main menu) to see the supervised **Reviews** you need to act on.

If you hold more than one supervisor role, you will find the documents all gathered in the same place.

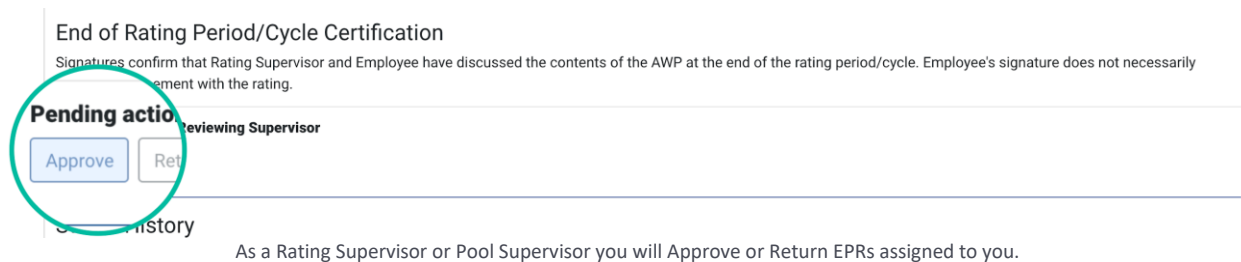


Find EPRs ready for review under Current Documents then select **View EPR**.

 This icon will alert you to documents that need urgent attention. You'll also get an email reminder of any pending actions.

To review an EPR, select **View EPR** from the **Actions** available. This brings up the document, including scores and justifications from the **Rating Supervisor**.

At the end of the form there's a box for your comments. These are not shared with the employee. From here you can **Approve** the EPR to go forward (to either the **Pool Supervisor** or HR, depending on your role), or **Return** it to the **Rating Supervisor** for changes. Any comments you enter will be seen by the employee in the Status History and will appear in the JF-50D.



- The **Status History** records each action taken on the document. Any comments entered will be recorded here and visible to the employee.

## RELEASING THE EPR

Once HR chooses to [Approve](#) the EPR, the **Rating Supervisor** is alerted to release the document to the employee. Just as before, find the EPR listed under [Current Documents](#) then select the [View EPR](#) action.

Head for the box at the end of the form to add your comments to be shared with the employee. These comments will be visible to the employee, but will not be saved to the JF-50D.

Once you [Release](#) the performance report, the employee will be notified to view it. This is when they will see their ratings for the first time. If you have the role to acknowledge on your employee's behalf, follow the instructions in **Acknowledge on behalf of the employee**

End of Rating Period/Cycle Certification

Signatures confirm that Rating Supervisor and Employee have discussed the contents of the AWP at the end of the rating period/cycle. Employee's signature does not necessarily represent agreement with the rating.

**Pending action** Rating Supervisor

[Release](#)

Status History

- ☆ Pending Rating Supervisor Release 05/24/2021

Release the EPR to share ratings with the employee.

## MANAGING PROBATION

When an employee first starts working as an LE staff member, they will likely need to serve a **probationary period**. During this time, they have the opportunity to demonstrate an ability to perform the job they were hired for.

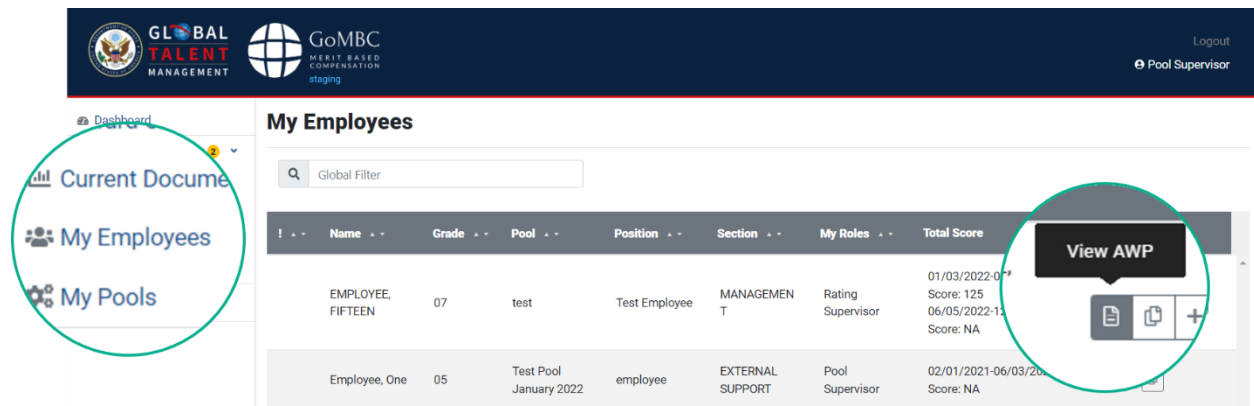
As the **Rating Supervisor**, you will record when this **Probationary Period** begins in the employee's **Annual Work Plan**.

During the probationary period, you will evaluate the employee's actual job performance to determine continued employment with the mission.

An employee must successfully complete the probationary period for continued employment. When the probationary period ends, you need to **Certify** your recommendation of their continued employment, **Request Extension** of the probationary period, or identify that the employee has not adequately performed assigned duties.

## STARTING PROBATION

Find your employee by selecting [My Employees](#) from the main menu. If you haven't yet set up an AWP, then choose [Initiate Annual Work Plan](#) from the available actions. If it's already there, pick [View AWP](#).



The screenshot shows the GoMBC system interface. At the top, there are logos for Global Talent Management and GoMBC Merit Based Compensation. The main content area is titled 'My Employees' and features a search bar and a table of employees. The table has columns for Name, Grade, Pool, Position, Section, My Roles, and Total Score. Two employees are listed: 'EMPLOYEE, FIFTEEN' and 'Employee, One'. A 'View AWP' button is circled in green on the right side of the table. The left navigation menu includes 'Current Documents', 'My Employees', and 'My Pools'.

Name	Grade	Pool	Position	Section	My Roles	Total Score
EMPLOYEE, FIFTEEN	07	test	Test Employee	MANAGEMENT	Rating Supervisor	01/03/2022-06/05/2022-11 Score: 125 Score: NA
Employee, One	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-06/03/2022 Score: NA

Find an employee from the main menu then select the appropriate action.

- Full details on how to fill out an AWP are in the [Annual Work Plan](#) section.

Inside the AWP, set the [Is In Probationary Period](#) switch in the **Employee Data** section to [Yes](#).

In the **Probationary Period** section enter probation's **Start Date** and GoMBC will automatically calculate the end date. Speak to HR if the probationary period length shown in GoMBC isn't correct.

Review Date Range  
02/01/2021 - 07/01/2021

Is in Probationary Period?  
 Yes

Date of Position Description  
07/02/2020

Is Position Description accurate?  
 Yes

**Probationary Period**  
Rating Supervisor documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.

Start Date  
05/19/2021

End Date

Calendar picker showing May 2021 with the 19th selected.

Each Criterion's Rating.

Maximum of 20 Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All

Confirm the probation and select a start date using the calendar picker.

## ENDING PROBATION

At the end of the probationary period, return to [Current Documents](#) and select [View AWP](#) to return to the employee's Annual Work Plan. When certifying the probationary period, you have the option to recommend the employee for:

### COMPLETION OF PROBATION AND CONTINUATION OF EMPLOYMENT

If the employee has performed satisfactorily during the probationary period, you should certify your recommendation of their continued employment.

In the AWP's **Probationary Period** section, set the [Is Employee recommended for continued employment?](#) switch to **Yes**. Hit [Certify](#) to confirm your recommendation and the probation's completion.

**Probationary Period**  
Rating Supervisor documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.

Start Date  
11/30/2020

End Date  
05/29/2021

Request extension

Is Employee recommended for continued employment?  
 Yes

**Pending** Recommendation by Rating Supervisor

Certify

Select Certify to confirm your recommendation and complete the probation.

#### EXTENSION OF THE PROBATIONARY PERIOD

Subject to local law, if you need further evaluation of the employee's ability to perform their job you can ask HR to extend the probationary period.

In the AWP's **Probationary Period** section, select [Request extension](#). HR may want to understand your reasons and will either approve or reject your request. Probation for each employee can only be extended once.

#### SEPARATION

Subject to local law, if an employee does not perform satisfactorily at any time during the probationary period you may decide not to recommend their continued employment. Notify HR as soon as possible about any issues with the employee's performance.

In the AWP's **Probationary Period** section, set the [Is Employee recommended for continued employment?](#) switch to [No](#).

Made a mistake? If you made a mistake in the certification of the probationary period, inform your HR staff. They can assist you in resetting the probationary period.

- [Subject to local labor laws, employees on probation may not receive MBC rewards.](#)

## PERFORMANCE IMPROVEMENT PLAN

If you believe there are serious issues affecting your employee's work, you should consider documenting poor performance in a **Performance Improvement Plan (PIP)**.

The PIP is a comprehensive plan that assists employees in improving their performance within a set time period. It provides guidance on the actions needed to improve performance with support from the Rating Supervisor. The PIP outlines how this supervisor will aid the employee in this process.

- Ask HR for specific guidance on dealing with serious performance or conduct issues.

## CREATING A PIP

As a **Rating Supervisor**, you can start a PIP at any time, as long as at least 30 days remain before the end of the performance year. PIPs must be created in GoMBC when an employee receives a **Total Performance Score** of less than 100 on their EPR.

To create a PIP manually, first find the employee by selecting **My Employees** from the main menu. The **Action** to take here is **Initiate Performance Improvement Plan**.

The screenshot shows the GoMBC interface. At the top, there are logos for 'GLOBAL TALENT MANAGEMENT' and 'GoMBC MERIT-BASED COMPENSATION staging'. A 'Logout' button and 'Pool Supervisor' role are visible in the top right. The main content area is titled 'My Employees' and features a search bar labeled 'Global Filter'. Below the search bar is a table with columns: Name, Grade, Pool, Position, Section, My Roles, Total Score, and Actions. Two employees are listed in the table. The first row is for 'EMPLOYEE, FIFTEEN' with a grade of 07 and a total score of 125. The second row is for 'Employee, One' with a grade of 05 and a total score of NA. A green circle highlights the 'My Employees' menu item on the left sidebar. Another green circle highlights the 'Initiate Performance Improvement Plan' button in the 'Actions' column of the first row. A third green circle highlights a larger 'Initiate Performance Improvement Plan' button in a dropdown menu.

Name	Grade	Pool	Position	Section	My Roles	Total Score	Actions
EMPLOYEE, FIFTEEN	07	test	Test Employee	MANAGEMENT	Rating Supervisor	01/03/2022-05/28/2022, Score: 125 06/05/2022-12/31/2022, Score: NA	[Icons]
Employee, One	05	Test Pool January 2022	employee	EXTERNAL SUPPORT	Pool Supervisor	02/01/2021-06/03/2021, Score: NA	[Icon]

Find an employee from the main menu then select the appropriate action.



Select the **Performance Period** the plan covers and the date it should start. Select [Initiate](#) to begin filling out the plan.

**Initiate Performance Improvement Plan** Back

Performance Period  
2021-2022

Start Date  
05/27

Ca Initiate

#### SECTION 1—EMPLOYEE DATA

Confirm the employee's details are correct. The **Performance Period** and **Start Date** are carried over from the previous step, though you can adjust them here while editing the document.

- At any time, you can see the PIP as an official **JF-50B** form, ready for printing. Just select **View JF-50B form** to switch your view.

#### SECTION 2—AREAS FOR IMPROVEMENT

Fill out details of your specific concerns, directly relating to the employee's **Position Description** or **Annual Work Plan**. Provide examples (including dates) of issues you've observed to need improvement.

- Your comments are saved automatically as you type but aren't shared with the employee until you **Endorse** the PIP and HR **Approves** it.

#### SECTION 3—REASONS FOR IMPROVEMENT

Add specific reasons why you consider the employee's performance to be ineffective. Examples include missed deadlines, substandard work, or interpersonal conflict.

#### SECTION 4—ACTIONS NEEDED

List the actions the employee must complete to improve their performance. Examples include formal training, counselling, or learning from co-workers. Where appropriate, provide details on the schedule and expected outcomes of these activities.

#### SECTION 5—ASSISTANCE PROVIDED

Add the actions **you** will take to support the employee's improvement. This could include closer monitoring of their work, setting checklists, and scheduling regular feedback.

## SECTION 6—TIMEFRAME

Enter the period of calendar days this PIP should cover. Make sure to give the employee enough time and support (at least 30 days) to reach an acceptable level of performance. Most PIPs run 30—120 days, though can run up to the end of the current rating cycle.

## Section 7—Signatures

Enter any closing comments as **Rating Supervisor**, then [Endorse](#) the Performance Improvement Plan.



- The **Status History** records each action taken on the document.

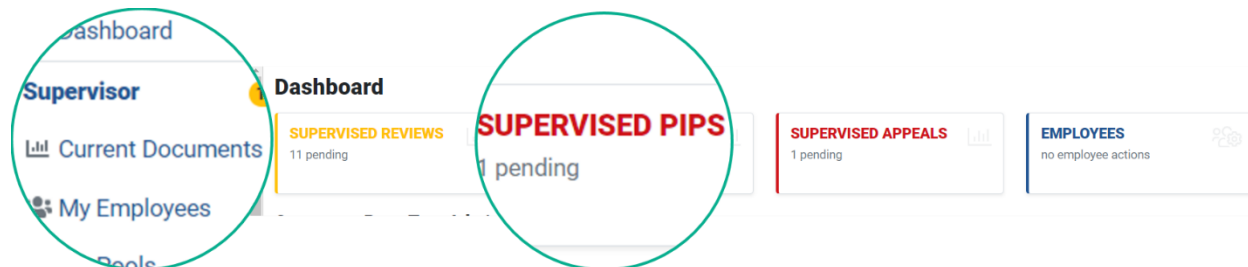
## SHARING THE PIP

Your endorsed draft of the PIP is now pending HR review. HR now checks the document before they [Approve](#) or [Return](#) for adjustment.

In both cases the PIP returns to you as the **Rating Supervisor**. If the PIP is approved by HR, it's time to share it with the employee.

## SHARING WITH THE EMPLOYEE

Return to the PIP document by selecting [Current Documents](#) from the main menu. In the **Performance Improvement Plans** section, you will see the PIP's status and the **Action** to [View Performance Improvement Plan](#).



## Current Performance Improvement Plans

Global Filter				
Status	Employee	Start	End	Actions
PIP Created	Smith, Joe	02/11/2021	02/11/2021	<a href="#">View Performance Improvement Plan</a>

At the bottom of the document you should [Endorse](#) the PIP once again. This releases it to the employee and prompts them to review its contents.

Once the PIP is released, the employee has 5 days to add their own comments and [Acknowledge](#) the document in GoMBC.

**Rating Supervisor**  
Faust, Ilsa

... appears to be a fair plan for improvement.

[Endorse](#)

Endorse the HR-approved PIP to release it to the employee.

- [Ask HR about proper procedure for sharing a PIP with the employee.](#)

## REVIEWING PERFORMANCE

At the end of the PIP timeframe, you need to formally review this progress. If the employee has shown acceptable performance in the areas identified, as the **Rating Supervisor** you now need to finalize the PIP document, confirming the end of the process.

Return to the PIP document by selecting [Current Documents](#) from the main menu and locating the document in the **Performance Improvement Plans** section. The **Action** to take is [View Performance Improvement Plan](#).

You can't edit the document at this point, but at the bottom you should now [Initiate Performance Improvement Plan Review](#).

Section 7 of the PIP now provides options to [Finalize Successfully](#) (ending the PIP if the employee has returned to acceptable performance), [Finalize Unsuccessfully](#) (ending the PIP and recording that the employee has not returned to acceptable performance), [Extend Timeframe](#) if further improvement is needed.

Section 7 - Signatures

The signatures of the Rating Supervisor and Employee certify agreement with Sections 2, 3, and 4. All development activities depend upon funding and workload.

**Rating Supervisor**

Pool Supervisor

Add a justification...

You can extend the PIP for a minimum 30 days. Maximum 150 days.

[Finalize Successfully](#) [Finalize Unsuccessfully](#) [Extend Timeframe](#) 30

Record successful completion of the PIP or request an extension.

- Once you finalize the PIP, the document no longer appears in Current Documents. However, you can still find it in **History**.

#### EXTENDING THE TIMEFRAME

In some cases, you may need to extend the PIP period. Speak to HR and the employee before requesting an extension.

To extend the PIP period, add the calendar days the extension will run and write a justification for your request. Select [Extend Timeframe](#) to pass this request to HR.

HR may [Approve](#) the extension, or deny it and [Return](#) the document to you. If your extension request is denied, you now need to decide whether the employee has completed the PIP to your satisfaction. Select [Finalize Successfully](#) or [Finalize Unsuccessfully](#), adding a justification for your decision.

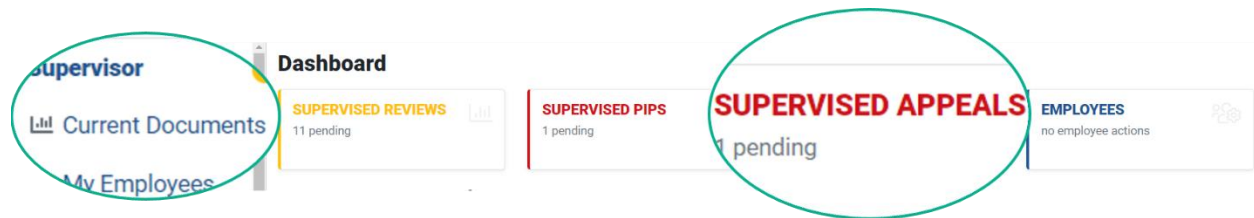
If HR does [Approve](#) the extension, you will be notified to [Endorse](#) the PIP's new timeframe. At the end of this period, you will need to [Finalize Successfully](#) or [Finalize Unsuccessfully](#) the document.

A PIP can only be extended once. The extension runs for a minimum of 30 days and can't go beyond the end of the current rating cycle. Even when extended, the PIP covers the same areas of improvement as before. For new cases of ineffective performance from the same employee, create a separate PIP.

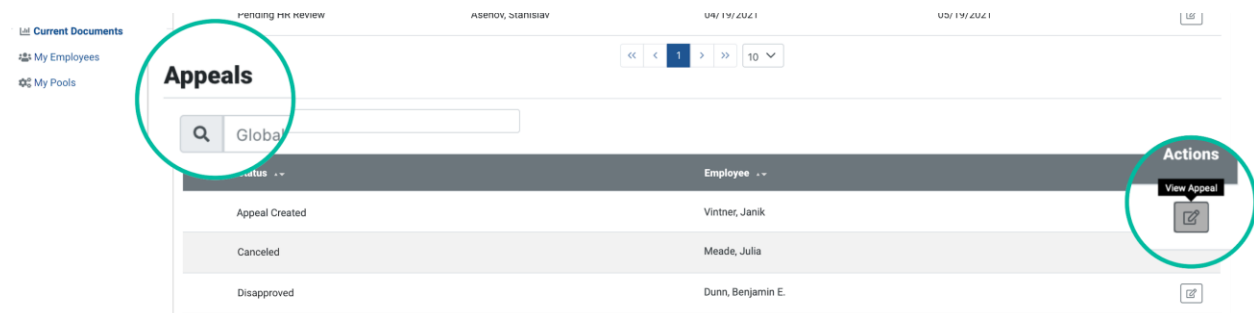
## APPEALS

When your employee first receives their scored **Employee Performance Report (EPR)**, they have the option to add their comments and then Acknowledge the document as correct or Initiate Appeal if they have concerns about their EPR or the review process. Appeals must be lodged within 5 business days of receiving the scored EPR.

As the **Rating Supervisor**, you will be notified of the employee's appeal. Find it under **Appeals in Current Documents** or through the **APPEALS** section of the dashboard.



The **Action** to take is **View Appeal**.



The appeal shows its current status and comments left by the employee. **View Review** directs you to the employee's EPR.

You have 5 business days to add your comments for the employee and **Approve** or **Disapprove** the appeal. Approving the appeal will re-open the employee's EPR for your review. The process of scoring and approval by supervisors and HR begins again.

If you choose to disapprove the appeal, the employee will be notified. They have the option to **Cancel** their appeal or escalate it to the **Reviewing Supervisor**. Once again, this supervisor can **Approve** or **Disapprove** the appeal.

If the **Reviewing Supervisor** chooses to disapprove the appeal, the employee can escalate to the **Pool Supervisor**. As before, they can **Approve** or **Disapprove** the appeal.

- Only one appeal is allowed for each **Employee Performance Report**. Once the appeal is approved, disapproved or cancelled, a second appeal cannot be lodged.

## Appeal

[Back](#)

### Data

Status: Pending Rating Supervisor Review

Employee: Vintner, Janik

Rating Supervisor: Faust, Ilsa

Reviewing Supervisor: Donloe, William

Pool Supervisor: Hessel, Theodore K.

### Pool Supervisor

[View Review](#)

### Content

I don't think this is fair.

### Comments

- Submitted by Employee **Vintner, Janik** 03/05/2021

### Signatures

#### Pending action by Rating Supervisor

Faust, Ilsa

I agree they have a point here.

[Approve](#)[Disapprove](#)

Each supervisor has the opportunity to approve or disapprove the employee's appeal.

- If the employee's **Rating Supervisor** and **Reviewing Supervisor** are the same person, the employee can escalate directly to the **Pool Supervisor**.

The **Pool Supervisor** normally makes the final call on the employee's appeal. However, in cases where all 3 supervisors are the same person, the employee can lodge their appeal directly with the **Deputy Chief of Mission (DCM)**. The DCM can then [Approve](#) or [Disapprove](#) the appeal. Approving the appeal causes the EPR to be re-opened for review by the **Rating Supervisor**. Disapproving the appeal at this final stage notifies employee that their appeal was unsuccessful and requests their acknowledgement.

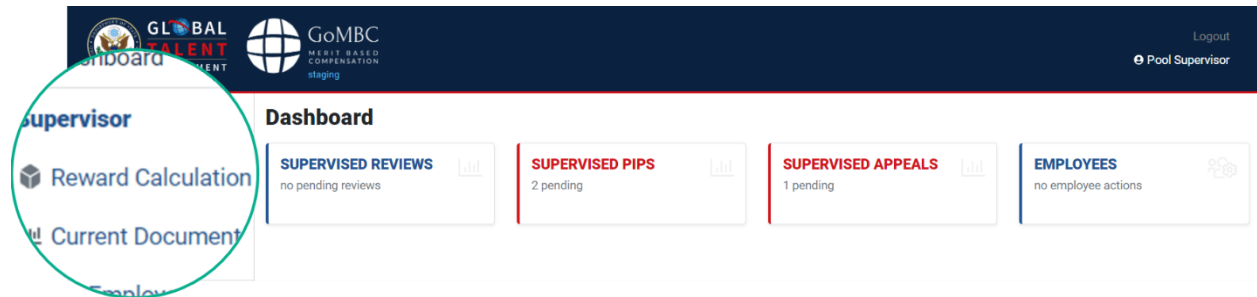
When an appeal is cancelled (at any time by the employee) the scored EPR is returned to the employee for acknowledgement.

- Employees, their supervisors, and HR staff can all track the status of an appeal. The **Status History** follows every update to the document, showing who did what.

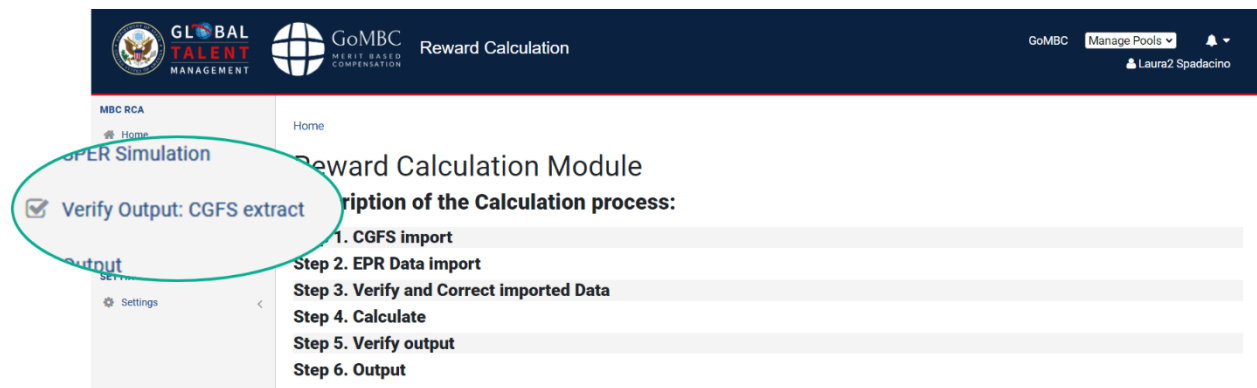
## APPROVING CALCULATIONS IN RCA

If the GoMBC **Reward Calculation Specialist** has requested your **digital** approval of the reward calculations, you will be notified when its ready for review.

From GoMBC, select Reward Calculation to open the Reward Calculation Application module of GoMBC.



To view calculations and approve, select [Verify Output: CGFS Extract](#) from the left menu.



Select [Download PDF](#) to see the calculation breakdown for your pools. Once reviewed, select [Approve](#) for the associated pool. If you have any questions about the calculations, speak to HR.

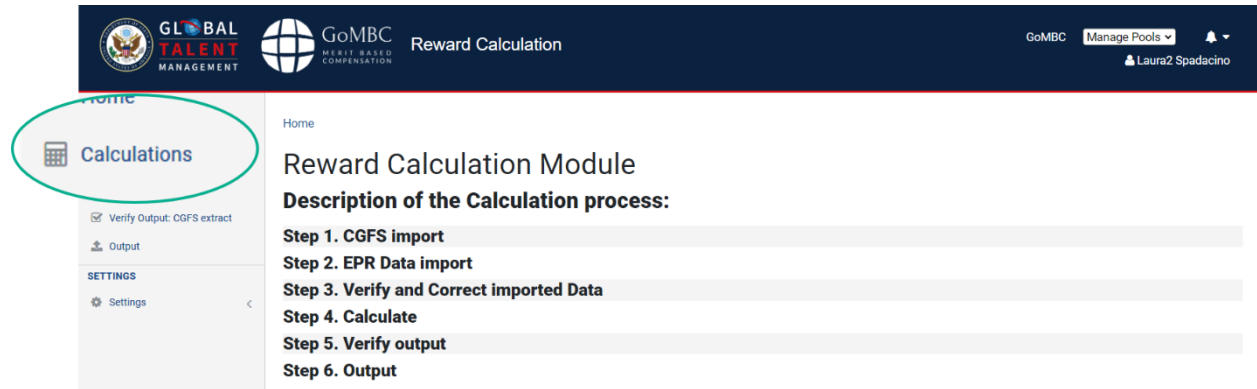
### Tier 1 Approvers : Not Approved

Pool Name	Approval Status
ICASS-1	Not Approved
Digital Approval	Approver Name <b>Smith, Jane</b>   Actions <a href="#">Approve</a> <a href="#">Download PDF</a> <a href="#">Upload Signed PDF</a>
Alternative Paper Approval	

The 'Approve' button and the 'Download PDF' button in the 'Digital Approval' row are circled in green. A separate 'Download PDF' button is also circled in green and connected to the 'Download PDF' button in the table by a line.

If you need to approve using **paper**, the **Reward Calculation Specialist** will provide you with a PDF document of the calculations for your signature. They will then upload this signed PDF to RCA.

You can also view more detailed calculation information by selecting [Calculations](#) in the left menu.



#### TIER 1 APPROVAL

This step completes when all **Pool Supervisors** have reviewed and approved calculations for their pools. During this time, supervisors can undo the approval by selecting [Recall Approval](#) from the **Verify Output** section.

#### TIER 2 APPROVAL

This step completes when the **HRO** or **Management Officer** reviews the calculations approved by each **Pool Supervisor**. They can [Approve](#) in RCA once everything looks good and can later [Recall Approval](#) if needed.

#### TIER 3 APPROVAL

This step completes when the **DCM** or **designate** is satisfied with all calculations for their mission. They can [Approve](#) in RCA once everything looks good and can later [Recall Approval](#) if needed.