GoMBC HR Manual

VERSION 3.1. LAST UPDATED JANUARY 6, 2023

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 on GTM/OE's website**.

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 allows for management 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

As the local HR representative, you will manage the day-to-day operation of GoMBC. You will work with supervisors and employees throughout the rating cycle, ensuring compliance and processing of **Employee Performance Reports**. At the end of the rating cycle, you (or other HR staff) will calculate the employee's MBC reward in the RCA portion of the application.

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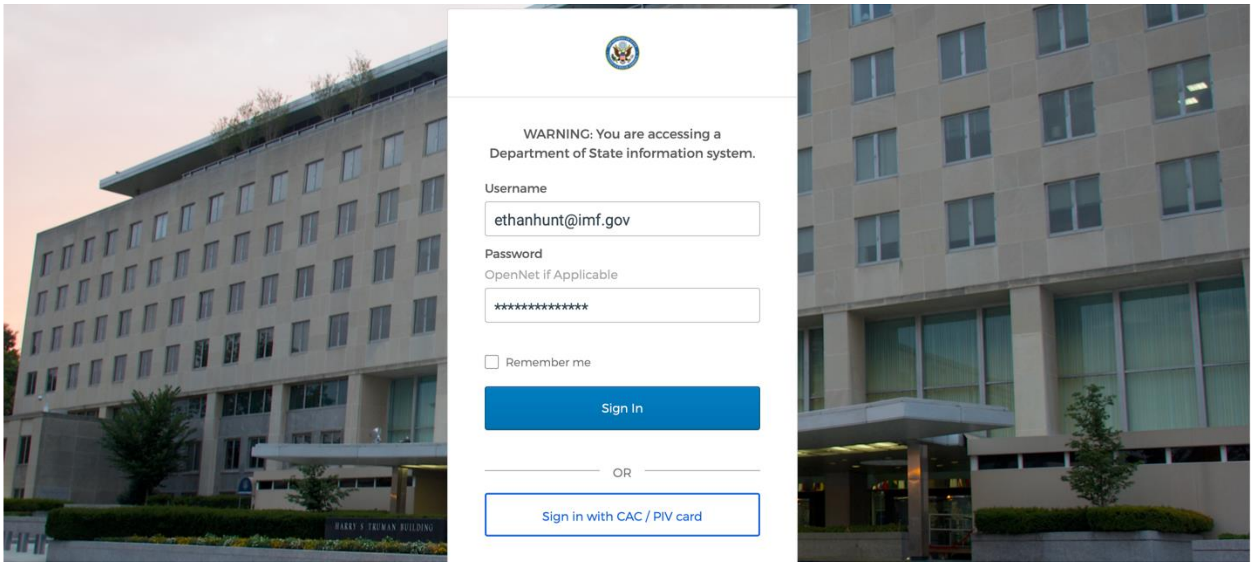
Accessing GoMBC

GoMBC is available online at gombc.state.gov

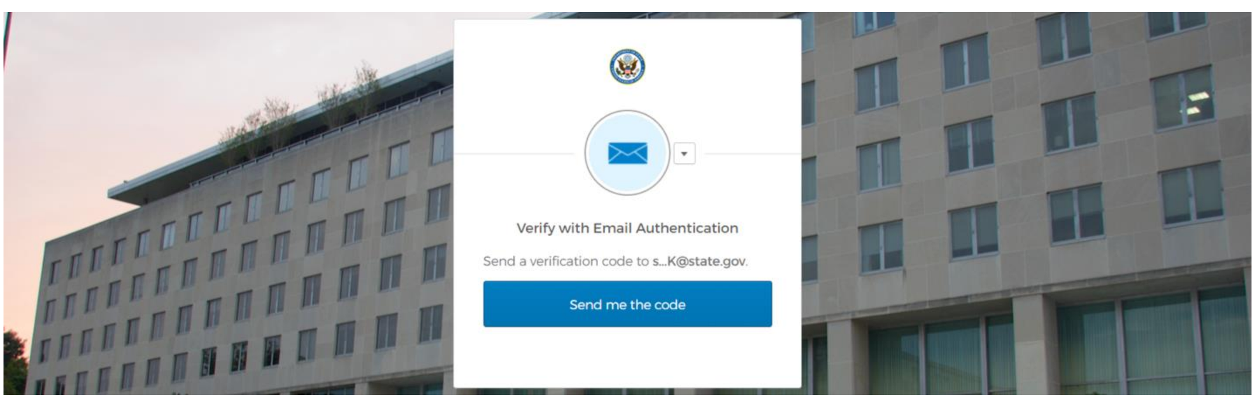
You can sign in from any web browser, but you will need to use an official government account (**.gov** or .**mil**) and may need to verify your identity.



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 have to enter any password or verify your identity.

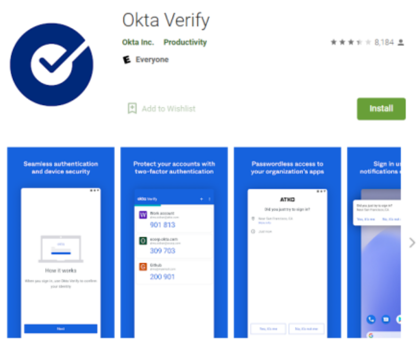
Not on OpenNet? Go to gombc.state.gov and enter your DoS username and password. You'll be prompted to either send a verification code to your email account (see below) or use the Okta Verify app to confirm your identity.



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

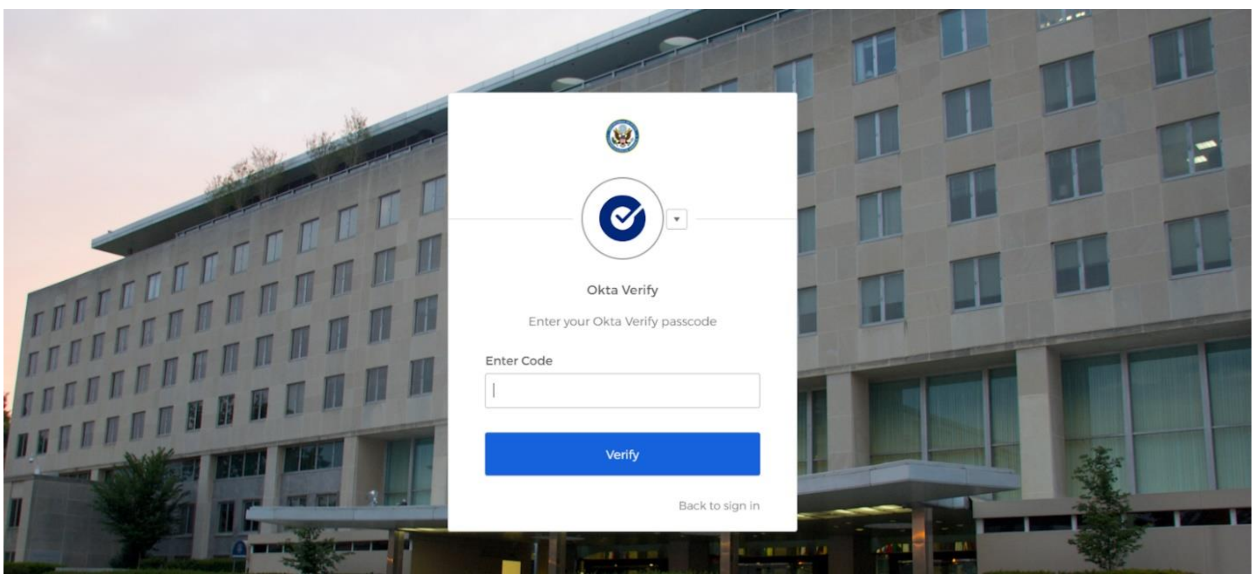
OTHER GOVERNMENT ACCOUNTS

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** 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 and enter it into the website. Be quick—the number changes every 30 seconds.



Once signed in your browser will take you to GoMBC automatically. Read over the privacy notice before you Log in.

UNDERSTANDING ROLES

GoMBC uses **roles** to help people carry out tasks appropriate to their job. The role you hold in the app affects your experience, helping you focus on the information and actions you need. To manage the roles for people in your organization, go to **Assign Roles**.

INDIVIDUAL ROLES

These roles are held by staff in your post or mission to take part in the performance rating process. **Mission Administrators**, **Mission Managers**, **Post Administrators**, and **Post Managers** will be able to assign these roles.

Employee is the role held by LE staff members so they can work through the performance rating cycle.

Supervisor is the role given to a rating, reviewing, or pool supervisor. The rating and reviewing supervisor can be LE staff, but the pool supervisor must be a USDH.

ORGANIZATION ROLES IN MISSIONS

These roles apply to an entire Mission. Only **Mission Administrators** can assign these roles.

Mission Administrator is the USDH staff member in charge of the HR section in their embassy (usually an HRO, Management Officer, or USAID Executive Director). They have full access to GoMBC functions, including assigning **Individual** or **Organization** roles to others in their mission.

Mission Manager is an LE staff member within HR who manages the MBC program in their embassy and looks after the GoMBC application.

Appeal Reviewer is the DCM or designated USDH position reviewing an appeal when the Rating Supervisor, Reviewing Supervisor, and Pool Supervisor is the same person and the appeal has been denied at the first level.

Reward Calculation Mission Admin processes employee MBC rewards for their mission in the Reward Calculation Application.

Reward Calculation Approver serves as the tier 2 (HRO or Management officer level) or tier 3 (DCM or designate level) approver for the Mission calculations

Reward Calculation Reporting HR will be able to review RCA reports geared toward HR

Reward Calculation Reporting FMO will be able to review RCA reports geared toward the FMO

ORGANIZATION ROLES IN POSTS

If a consulate has its own HR office, the parent mission may decide to assign a separate set of roles. These are similar to the mission's roles but are scoped to employees in that consulate. Only **Post Administrators** can assign these roles.

Post Administrator is a USDH staff member in charge of the HR section in their consulate (usually an HRO or Management Officer). They have full access to GoMBC functions, including assigning **Individual** or **Organization** roles to others in their post.

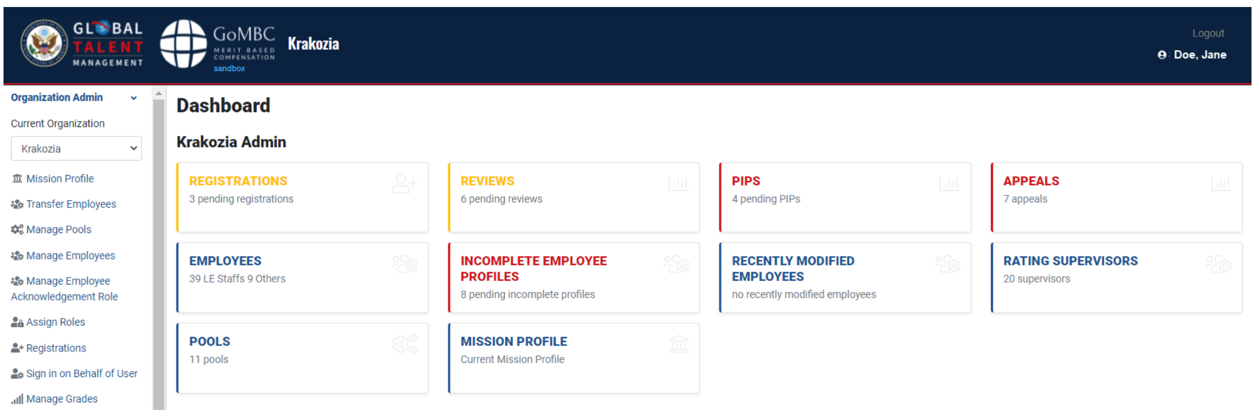
Post Manager is an LE staff member within HR who manages the MBC program in their consulate and looks after the GoMBC application.

Getting Around

From GoMBC's main home screen, you can access all the documents and tools you need to manage the application and performance management documents for your Mission or Post. 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.

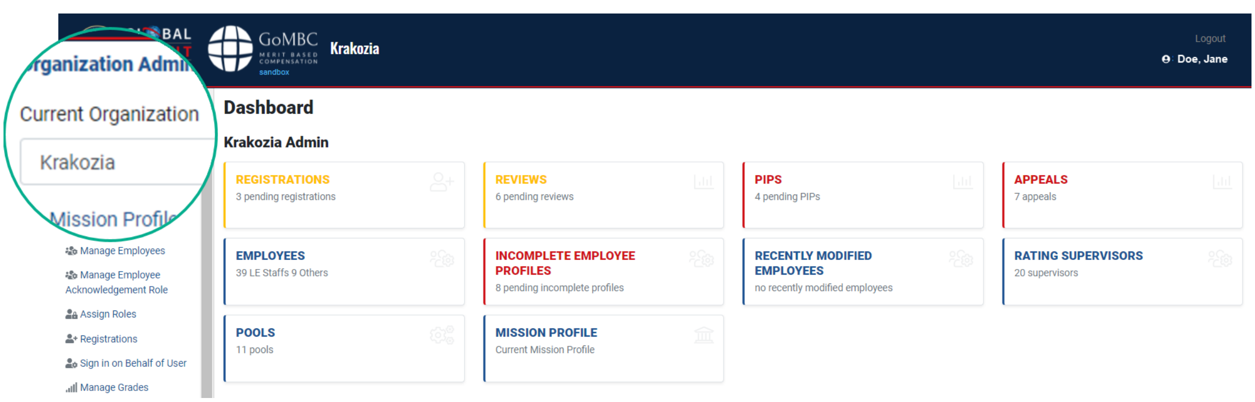
Exactly what you find here depends on the **roles** you hold in GoMBC. For missions, admins can hold **Mission Administrator**, **Mission Manager**, or **Reward Calculation Mission Admin** roles. Consulates with their own HR office may use **Post Administrator** or **Post Manager** roles.



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

MAIN MENU

Use the menu to navigate to documents and tasks for each role you hold. Scroll down in the menu to see how the options are organized by role.



The main menu has sections for each role you hold.

- Got actions to take? Menu headings are badged (like this: ③) to let you know.

Locally-Employed Staff

For employees, the menu gives access to their **Annual Work Plan, Mid-year Discussion** and (when it's time) their scored **Employee Performance Report**. They can also find any pending **Appeal** or **Performance Improvement Plan** for the current rating cycle.

Supervisors

The **Supervisors** (rating supervisor, reviewing supervisor, or pool supervisor) use the menu to find all the performance documents for the employees they're assigned to. These include **Annual Work Plans**, scored **Employee Performance Reports**, **Appeals**, and **Performance Improvement Plans**.

Organization Admin Menu

All **Mission Administrators**, **Mission Managers**, **Post Administrators**, and **Post Managers** will have access to this menu.

Current Organization shows the post or mission you're focused on. If you support more than one, switch between missions using the dropdown.

Mission Profile is where you'd edit the mission's **Name** and **Description**, assign a parent **Bureau**, set a **Time Zone**, define a **Probationary** period based on local labor law, and set the frequency of digest notifications that are sent to all staff to indicate pending tasks. This menu option is only available to Mission Administrators/Managers.

Transfer Employees helps you move people around between **Rating Supervisors** and **Reviewing Supervisors** and add or remove employees from each supervisor.

Manage Pools is where you organize employees into groups based on agency, section, funding, grade, and duties. These pools are used to calculate each employee's share of the MBC reward. This menu option is only available to Mission Administrators/Managers.

Manage Employees gives you access to every employee record in the post or mission. From here you can manage the details and status of any person, view their roles, and access their **Employee Performance Reports**.

Manage Employee Acknowledgement Role is where you can assign the employee acknowledgement role to allow for electronic processing of documents for employees that do not have an official government account.

Assign Roles helps you assign GoMBC roles and permissions to an employee.

Registrations lists the new USDH GoMBC users waiting for you to approve their account.

Sign in on Behalf of User gives you access to anyone's GoMBC account, allowing you to see what they see and act as them.

Manage Grades lets you customize the grade levels that employees can hold in your mission. This option is only available to Mission Administrators/Managers.

Manage Documents helps you keep track of all the **Employee Performance Reports**, **Appeals**, and **Performance Improvement Plans** for past and present rating cycles.

HR worklist lists all performance documents that require an action by HR.

Manage Performance Periods is where to record when your location's performance rating cycles should begin and end. This option is only available to Mission Administrators/Managers.

Reward Calculation connects you to the **Reward Calculation Application**, used to calculate MBC rewards. This option is only available to Mission Administrators/Managers.

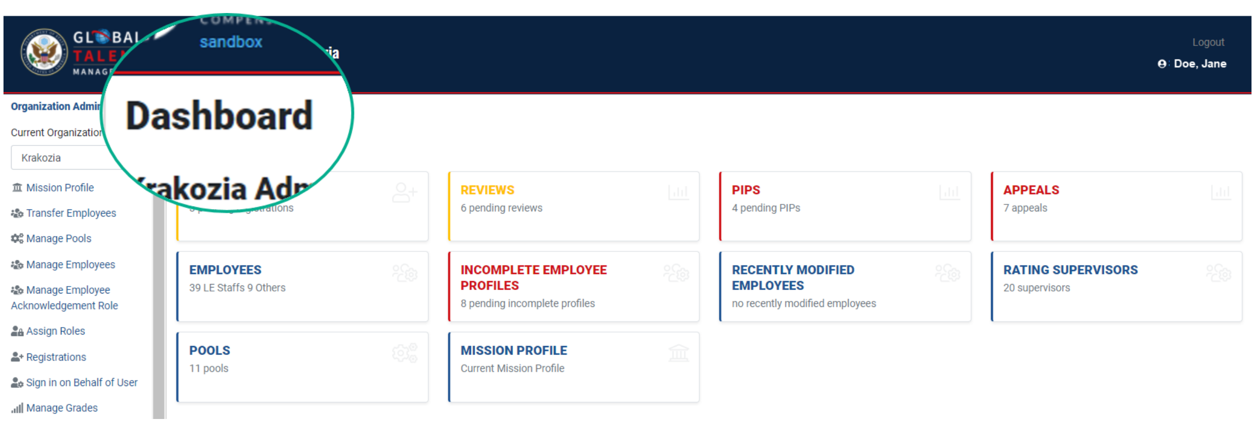
Failed RCA Transactions lists all records that failed during the submission from RCA to OPS for your Mission.

Audit Log records the date and time of every action performed in GoMBC.

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.

Just like the menu, the dashboard connects admins to more advanced management features.



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

The Admin section of the dashboard notifies you of pending items for your Mission or Post and is available to **Mission Administrators**, **Mission Manager**, **Post Administrators**, and **Post Managers**.

REGISTRATIONS is where you approve access for new GoMBC users (USDH only)

REVIEWS are the **Employee Performance Reports** for your Mission or Post.

PIPS links to the current **Performance Improvement Plan** for your Mission or Post. The number shown here indicates the number of PIPs that require HR review.

APPEALS is where you can find all **Appeals** lodged by employees in your Mission or Post.

EMPLOYEES opens the list of employee profiles for your Mission or Post.

INCOMPLETE EMPLOYEE PROFILES shows all employee profiles that require additional information.

RECENTLY MODIFIED EMPLOYEES if OPS recently sent an update to an LE Staff employee record, you will find it listed here.

RATING SUPERVISORS opens a list of all the rating supervisors at your Mission or Post.

POOLS links to the list of pools for your Mission or Post. This is only available to Mission Administrators/Managers.

MISSION PROFILE shows the Mission Profile. This is only available to Mission Administrators/Managers.

FAILED RCA TO OPS TRANSACTIONS lists all records that failed during the submission from RCA to OPS for your Mission.

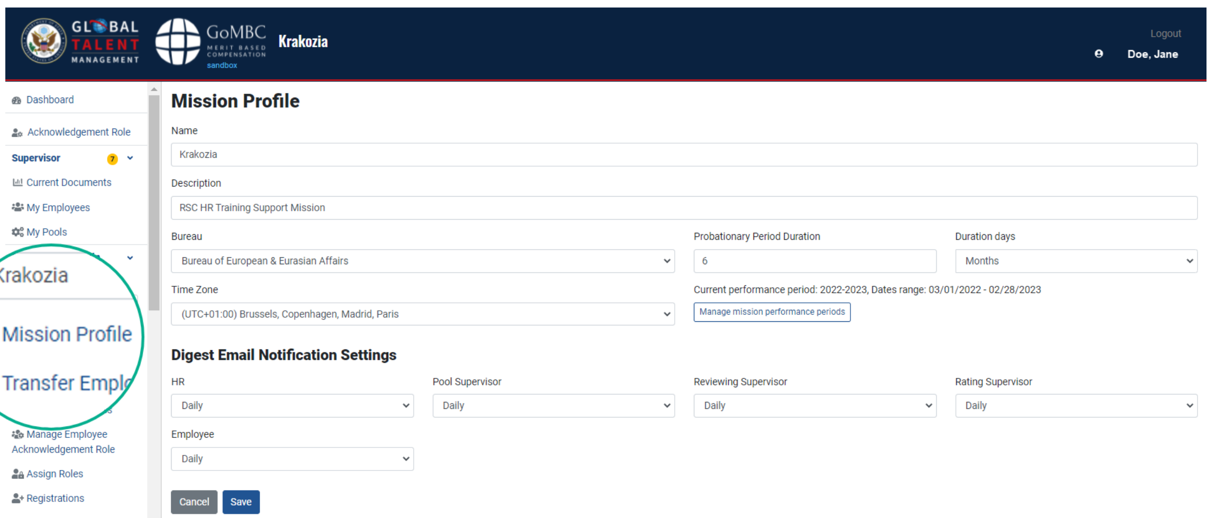
Mission Profile

- Only available to the **Mission Administrator** and **Mission Manager**.

This is the place where you can update the details of your mission, including the default **probationary period** for employees.

The **Name** of your mission is set automatically. You can't change this, though you can add a **Description** to help locate it.

Next, confirm the location's parent **Bureau** from the options available and define the default **Probationary Period Duration** for new employees (in days, months, or years) based on local labor law.



Edit the details for your mission.

- To customize a probationary period for an employee, use **Manage Employees**.

Set the correct **Time Zone** for your location to make sure actions taken in GoMBC have the correct timestamp.

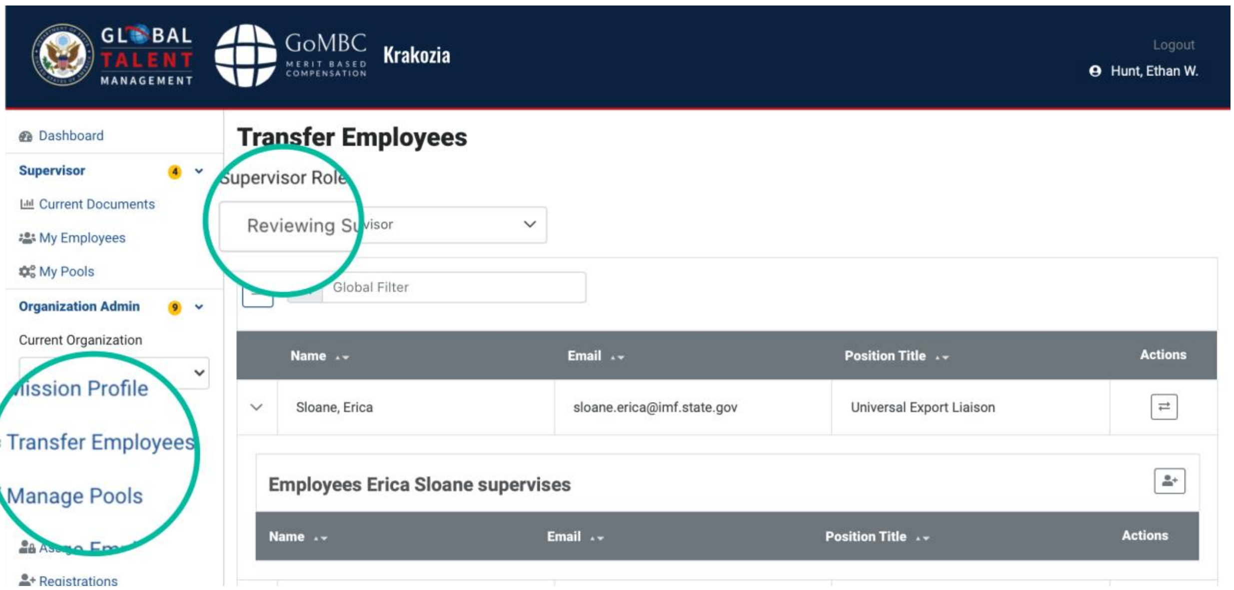
You will also see the dates of the current performance period. Selecting the link to **Manage Mission Performance Periods** takes you to the section to manage these dates. Make sure to Save your changes to the profile first.

When enabled, the **Digest Email Notification Settings** will allow you to define the frequency that employees should receive notifications about pending actions. Each role in the performance process (employee, rating supervisor, reviewing supervisor, pool supervisor, HR) can be given a different frequency: daily, every 2 days, every 3 days, or weekly.

TRANSFER EMPLOYEES

Use this tool to assign LE staff members to their **Rating Supervisor** and **Reviewing Supervisor** or transfer staff between supervisors.

Start by selecting the type of supervisor you want to focus on. In the **Supervisor Role** dropdown field, select either Rating Supervisor or Reviewing Supervisor. Depending on your choice, you now see a list of either **Rating Supervisors** or **Reviewing Supervisors**.



Before transferring employees, make sure you have the correct supervisor role selected.

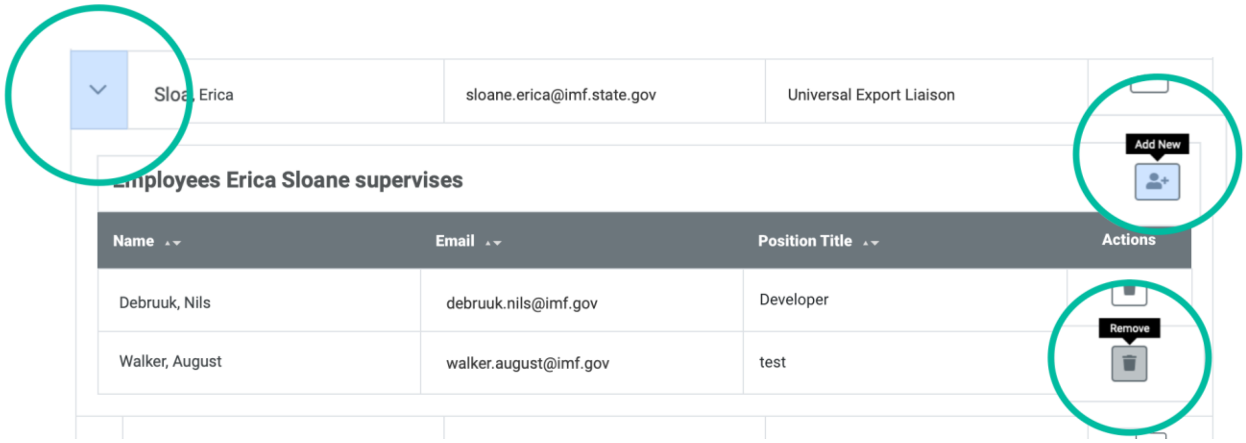
- A person can hold both of these supervisor roles, so could appear in both lists. The **Supervisor Role** dropdown selector shows which function you're focused on.

For each person in the list, use the **Expand** control to show employees that the supervisor supports as the selected role. You see employees listed by **Name**, **Email**, and **Position** title.

ADDING AND REMOVING EMPLOYEES

Use Add Employee to assign someone to your selected **Rating Supervisor** or **Reviewing Supervisor**.

Make sure you select the correct supervisor type in the **Supervisor Role** dropdown, then **Expand** the entry for your chosen supervisor to see the employees they support.



Expand the supervisor entry to show the people supported and add or remove employees.

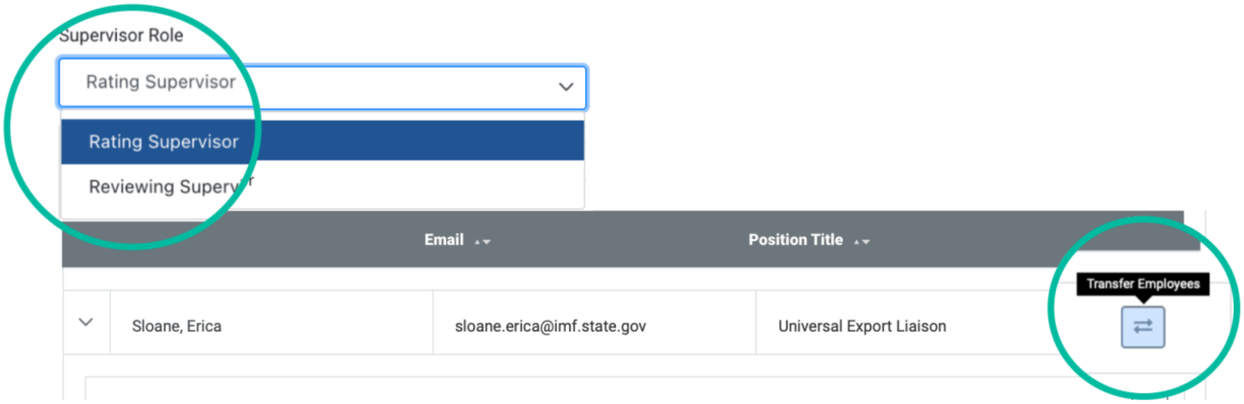
Select Add Employee (found just above the list of employees) to bring up **Employee Search**. Find the employee you're looking for, then choose Select to assign them to the supervisor. If the employee was already assigned to a different supervisor, this action moves them to the person you selected.

To remove an employee from a supervisor, select the Remove action from the employee's entry in the expanded list. You'll be asked to confirm your choice and later you will need to assign the employee to another supervisor.

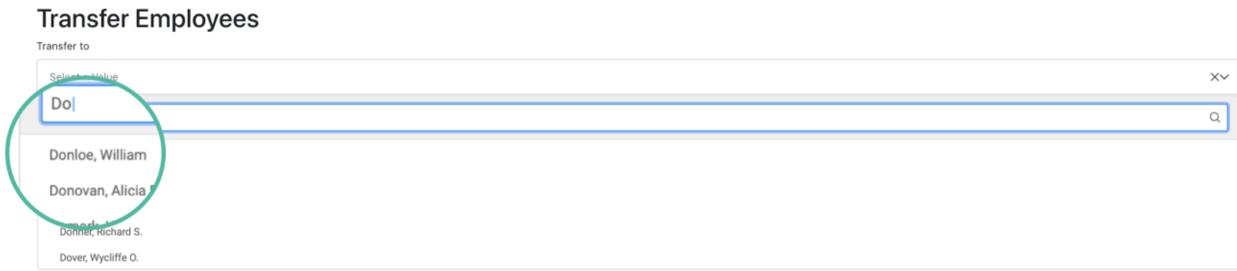
TRANSFERRING EMPLOYEES

For any supervisor in the list, use the Transfer Employees action to move one or more of their employees to a different supervisor. First make sure you select the correct supervisor type in the **Supervisor Role** dropdown.

Find the current supervisor from the list and select the Transfer Employees icon.



The action brings up the **Transfer Employees** window. Start by selecting the supervisor who should receive the employees.



Locate the supervisor who should receive the selected employees.

On the left, you now see a roster of employees under the current supervisor (the one you're transferring from). On the right, there's a space for the new supervisor (the one you're transferring to).

- The space for the new supervisor doesn't show any employees they already support.

Select an employee to highlight their name, then use the forward arrow control to move this person to the new supervisor. Or use the forward double arrow to transfer all the listed employees to the new supervisor at once.

Use the controls to add or remove employees from the selected supervisor.

- To select more than one employee at once, hold down the **CTRL** key on your keyboard.

Need to move people back? Use the backward single or double arrow to return them to the original supervisor.

Once you're happy with everything, **Confirm** your updates to the roster. You will be notified of any employees whose active **Annual Work Plan** will be transferred to the new supervisor. Choose **Continue** to go ahead and make the change.

Manage Pools

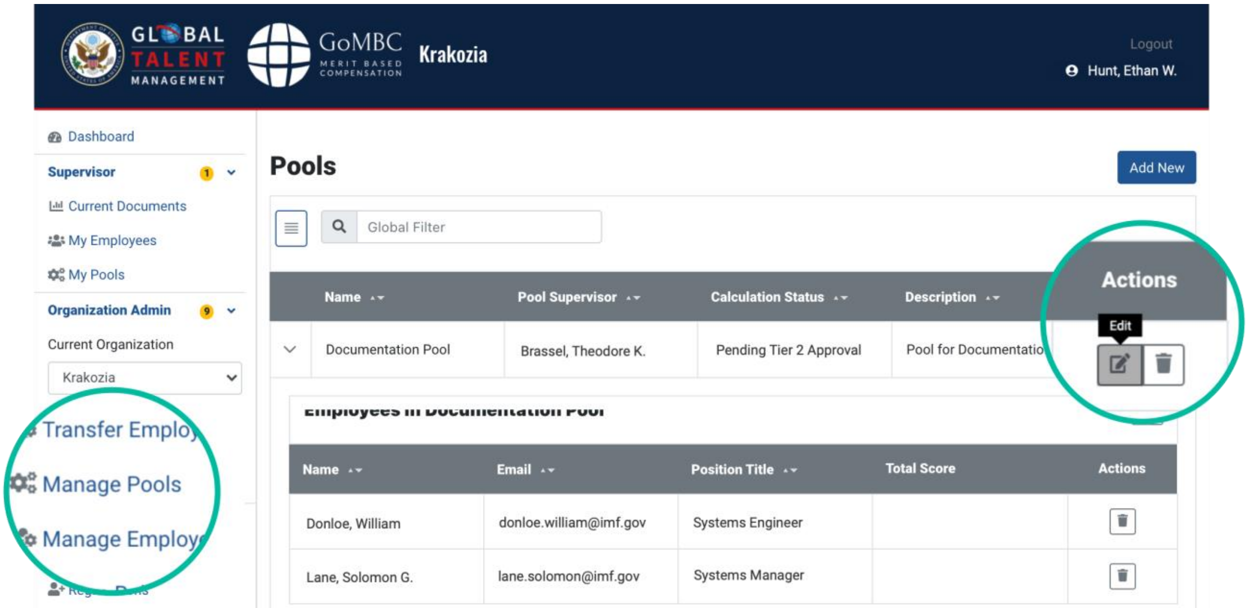
This section shows any existing pools created for your mission. You will also be notified here of any employees yet to be placed in a performance pool.

- Only available to the **Mission Administrator** and **Mission Manager**.

Managing Existing Pools

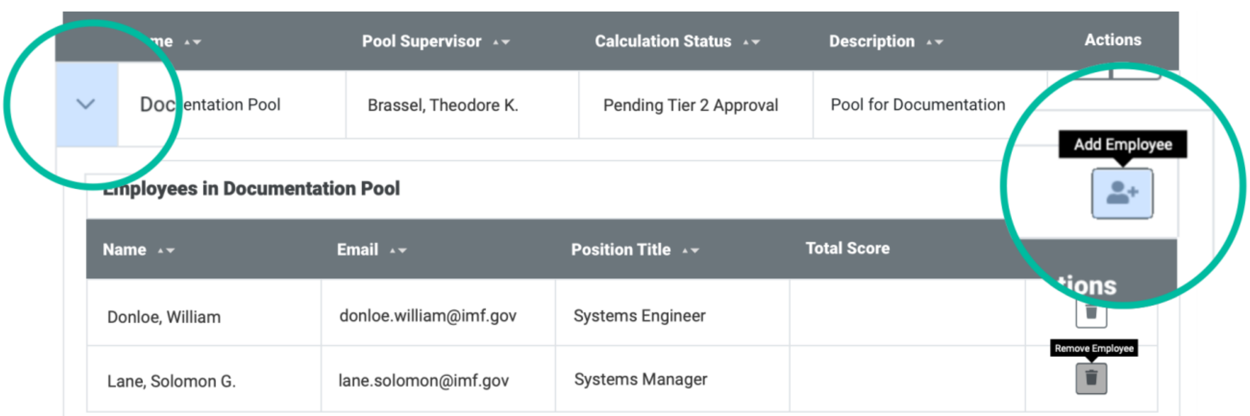
Use the list to find details of each pool, including its **Name** and **Description**, the assigned **Pool Supervisor** and its reward **Calculation Status** (from the **Reward Calculation Application**), showing whether MBC rewards for the current performance period have been finalized.

Actions to take here (if you need them) are to Edit the pool's details, or to Remove the pool from GoMBC.



Use the action to edit a pool's details or select **Add New** to create a new pool.

The **Expand** control reveals the employees currently placed in a selected pool. From here you can Add Employee (found by using **Employee Search**) or Remove Employee from the list.

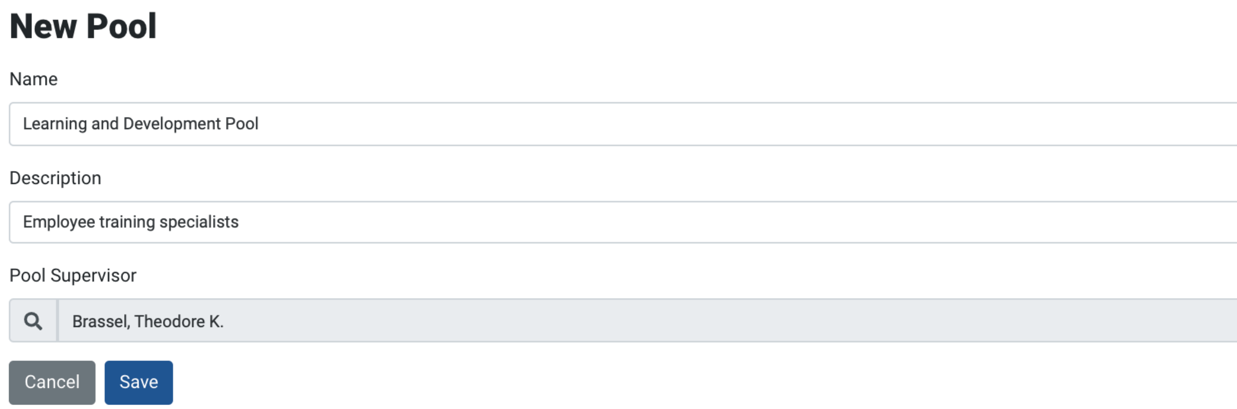


Expand the pool to reveal its members and add or remove employees.

- Above the list of pools, you will see any LE staff with no assigned pool. Be sure to place all employees in appropriate performance pools.

Creating a New Pool

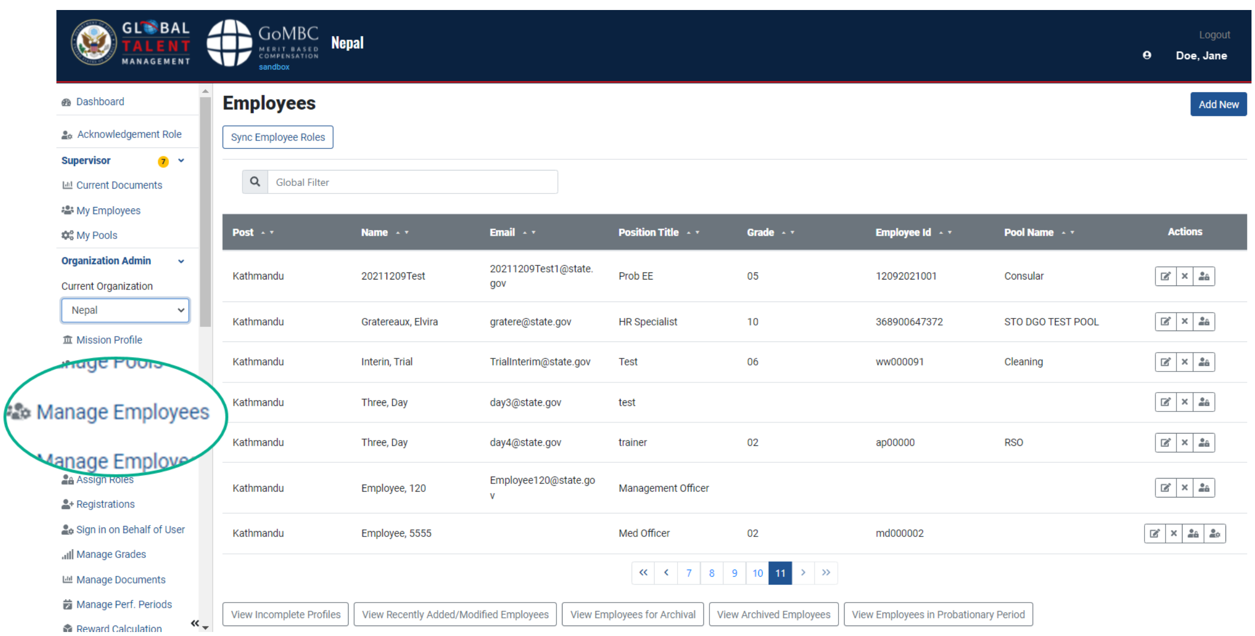
Use Add New to set up a new performance pool. You need to fill out the pool name, add a description, and assign a **Pool Supervisor**. Save the pool to begin adding employees.



Add the pool's name and description, then select a Pool Supervisor.

MANAGE EMPLOYEES

This section provides access to every employee record in your Mission or Post. From here you will manage the employee profile details of USDH and LE staff, assign roles, and access **Annual Work Plans** for approval, and see updates from the **Overseas Personnel System (OPS)** to GoMBC.



See all employees for the currently selected location.

The list shows registered employees by **Post**, **Name**, **Email**, **Position**, **Grade**, **Employee ID**, and performance **Pool**. LE staff details are sourced from OPS. Details for USDH staff come from **Registrations** to access GoMBC.

The **Actions** you can take on each employee depend on their employment type and whether they have an active or previous **Annual Work Plan**.

Edit lets you change the employee's information, including their **position** details and **supervisors**.

Archive archives the employee's account. Only non-LE staff can be removed this way.

Roles are the individual and organization roles held by the employee.

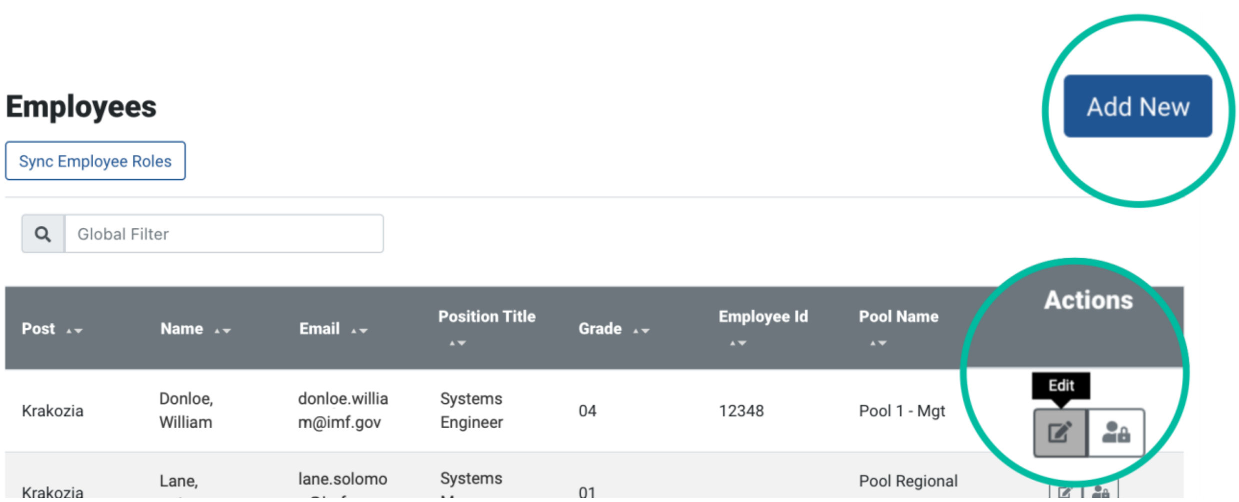
Manage Annual Work Plan appears when the employee has an active AWP and directs you to the document.

Assign Employee Acknowledgment Role appears when no username is entered. Selecting this option will allow you to authorize the supervisor to take actions on behalf of the employee. This allows for the continuing of electronic processing, but the official form is the paper form and the employee's physical signature is required.

- The latest LE staff details are downloaded automatically from OPS every hour.

ADDING AND EDITING EMPLOYEE DETAILS

Select Add New to create a new account for a non-LE staff member or use the Edit action for a chosen employee to update any employee's information.



Use the action to edit employee details or select **Add New** to create an account.

US Direct Hires (USDH)

For USDH staff members (including EFMs), you're able to edit basic details.

User Name should be the employee's official government email address. This is the account they use to log into GoMBC.

Name should be formatted as last name, first name, middle initial.

Email Address is where they receive notifications. This should also be a government address.

Post is the post they work at. When a USDH moves to another post, you (as the losing post) will select the new post from the drop down, this transfers the supervisor to the new location. Be sure that the supervisor has completed all performance documents and supervision has been removed before moving the supervisor to the new post.

Position Title is their official job title.

Is Employee Local Staff will be automatically set to **No** for non-LE staff. You can't change this in GoMBC.

Is Employee Supervisor shows whether the employee currently holds this role. You can change it here.

Locally-Employed Staff

Some details of LE Staff are sourced automatically by OPS and can't be changed in GoMBC. Here's what you can edit.

User Name should be the employee's official government email address. This is the account they use to log into GoMBC.

Email Address is where they receive notifications. This should also be a government address.

Rating Supervisor names their immediate supervisor, selected using **Employee Search**.

Reviewing Supervisor names the employee's next level supervisor, selected using **Employee Search**.

Pool names the performance pool the employee is placed in for MBC reward calculation, selected from the available options.

In Probationary Period defines the employee's probationary status. Setting this to Yes will prompt you to confirm the length of their probation. Any changes are then updated in the employee's current **Annual Work Plan**. Defining a probationary period here will allow you to define a different probationary period than the Mission default. It will also automatically add a probationary period to the AWP. If a probationary period is not defined here, the Rating Supervisor can still add a probationary period to the AWP and the Mission's probationary period time frame will be used for determining the probationary period end date.

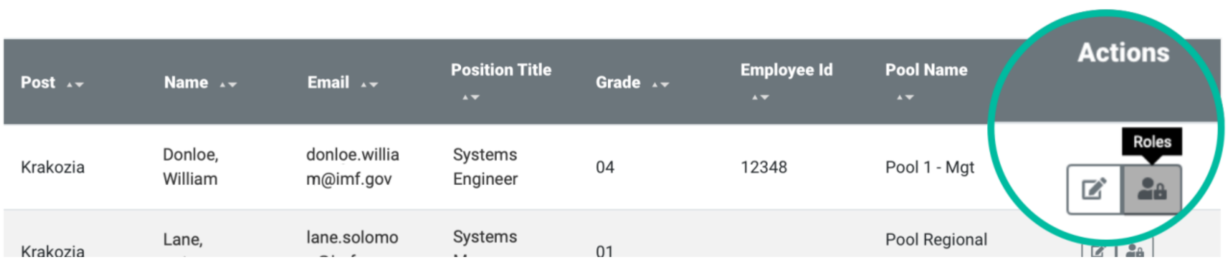
Is Employee Supervisor shows whether the employee currently holds this role. You can change it here. People with this role will have Universal Job Elements for supervision added to their AWP automatically.

Save your changes once you're done.

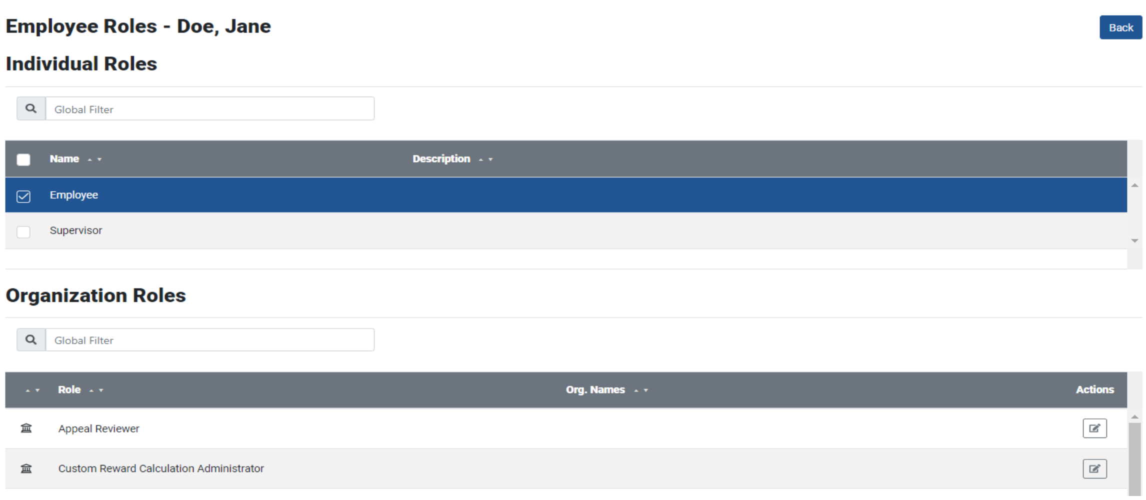
- Change other details, including the employee's **Name**, directly in OPS. They will then download automatically to GoMBC.

ASSIGNING ROLES

Select the **Roles** action to assign GoMBC permissions to an employee.



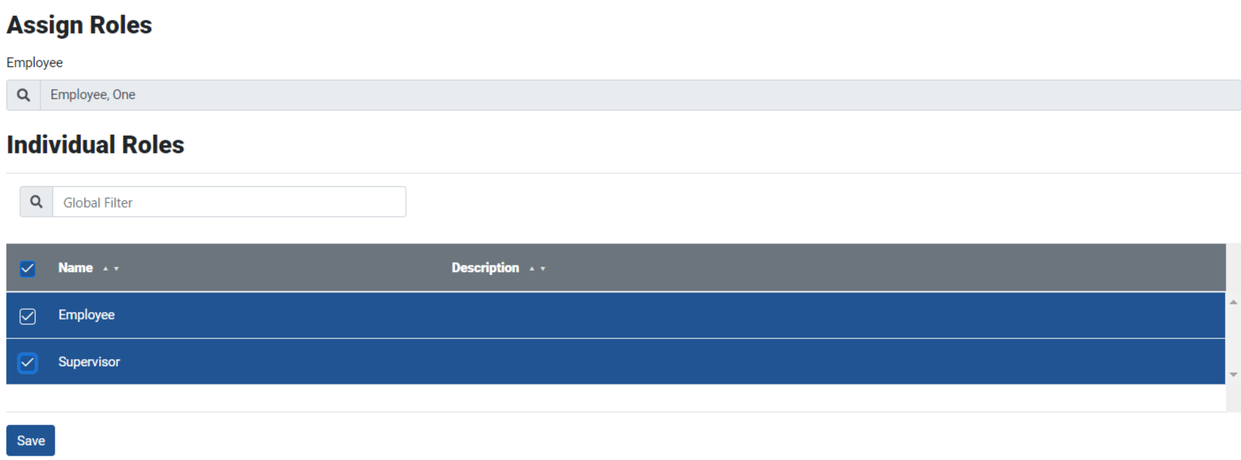
Mission/Post Administrators can view both **Individual** and **Organization** roles the employee holds, while Mission/Post Managers can view Individual roles only. Individual roles cover employees and their supervisory chain, while organization roles cover roles that apply to all of the Mission or Post. A person can hold several roles in GoMBC based on their employment type and job duties.



For more information on each role, see the **Understanding Roles** section.

ASSIGNING INDIVIDUAL ROLES

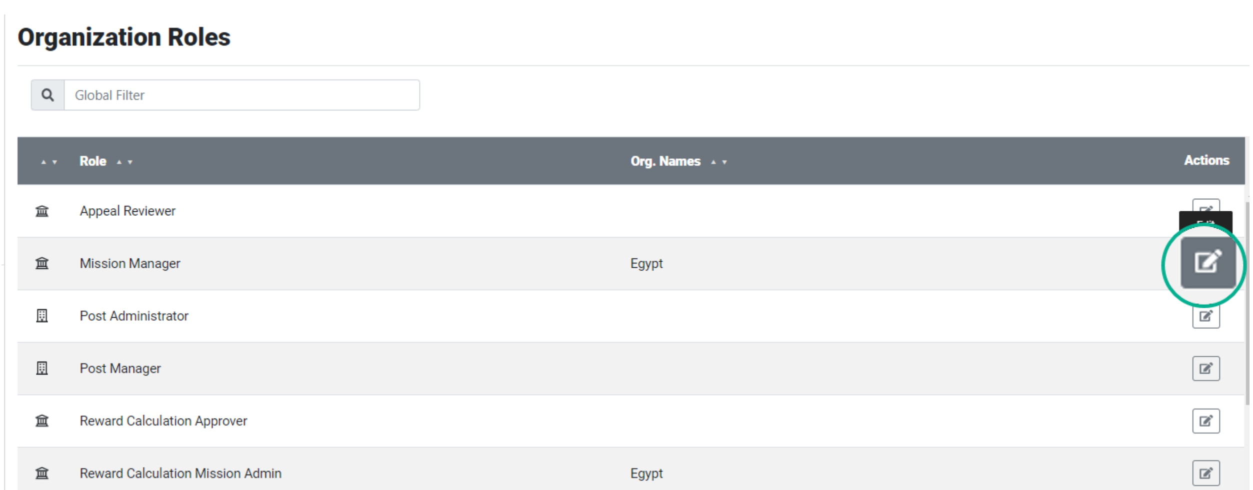
As a Mission/Post Manager/Administrator, you will be able to assign individual roles. To assign a role, simply select the check mark. To deselect a role, deselect the check mark. Don't forget to save your changes!



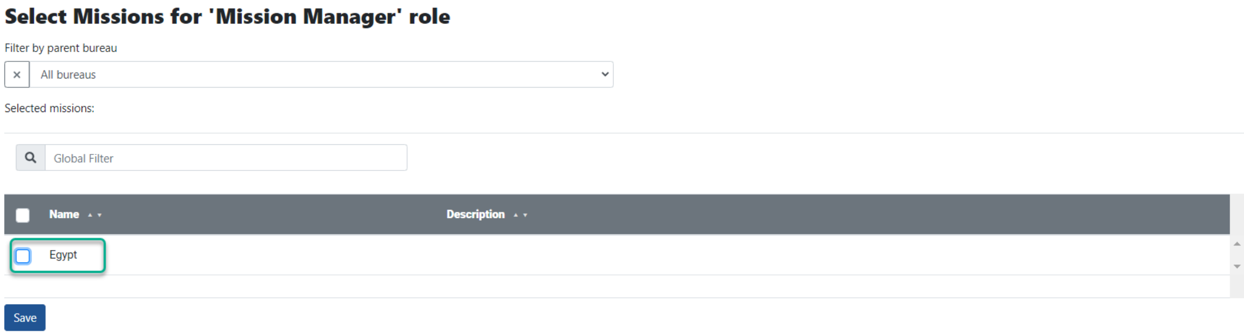
ASSIGNING ORGANIZATION ROLES

Only Mission/Post Administrators can assign organizational roles. Mission Administrators can assign Mission Manager, Appeal Reviewer, Post Admin, Post Manager, and RCA roles. Post Administrators can assign the Post Manager role only.

To assign or unassign an organization role, first select the role you would like to assign/unassign to the employee and select 'Edit'.



Next, add the role by selecting the checkbox for your mission or remove the role by deselecting the checkbox. Don't forget to save your changes!

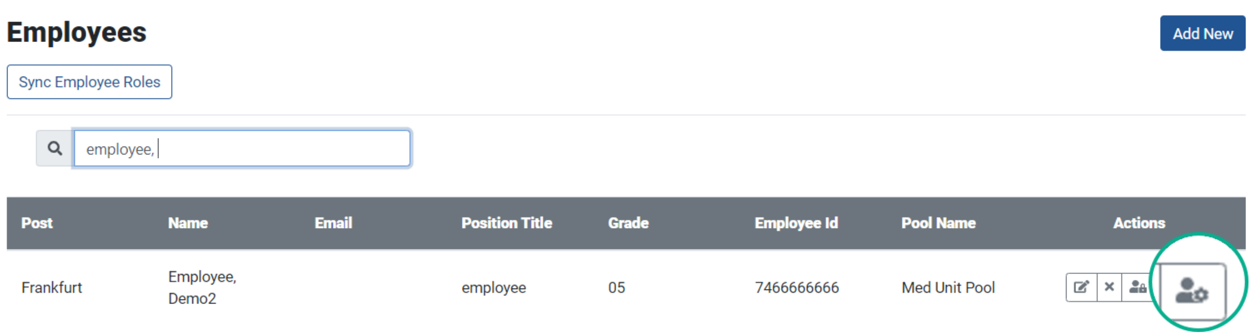


ASSIGN EMPLOYEE ACKNOWLEDGEMENT ROLE

When an LE Staff employee does not have access to an official Government account, a supervisor can be assigned the employee acknowledgement role to facilitate the processing of MBC documentation within GoMBC. More information about this process is covered in the **Manage Employee Acknowledgement Role** section

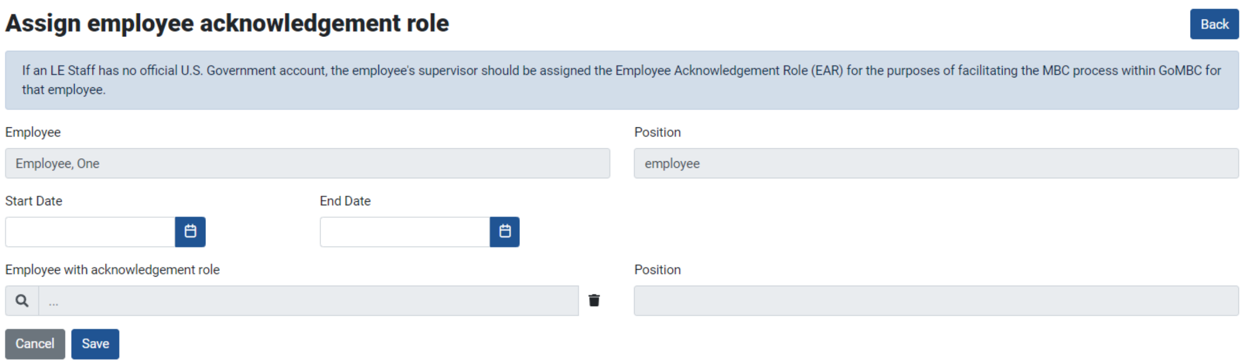
The first step in setting up the employee acknowledgment role is adding the employee acknowledgement role for each employee that requires it.

If the employee's username field is blank, the Assign Employee Acknowledgement Role action button will appear allowing you to choose which supervisor will serve in the employee acknowledgement role.



In the **Assign Employee Acknowledgement Role** page, set the date range. The start date is mandatory, but the end date is optional. If the end date is left blank, the employee acknowledgment role will continue indefinitely.

To select the supervisor that will serve in the employee acknowledgement role, search in the *Employee with acknowledgement role* field.



For the next setup step, you will upload an acknowledgement form that has been signed by the employee. For instructions on this step, see the **Manage Employee Acknowledgement Role** section.

EMPLOYEE STATUS REPORTS

Manage employees based on their profile status by selecting one of the report options.

View Incomplete Profiles lists employees with missing details. Choose the Edit action to fill in necessary information.

View Recently Added/Modified Employees shows the latest imports from OPS, organized by when they were added or changed. Use the controls to switch periods ranging from the last 24 hours to the last 30 days. From here you can Edit an employee's details.

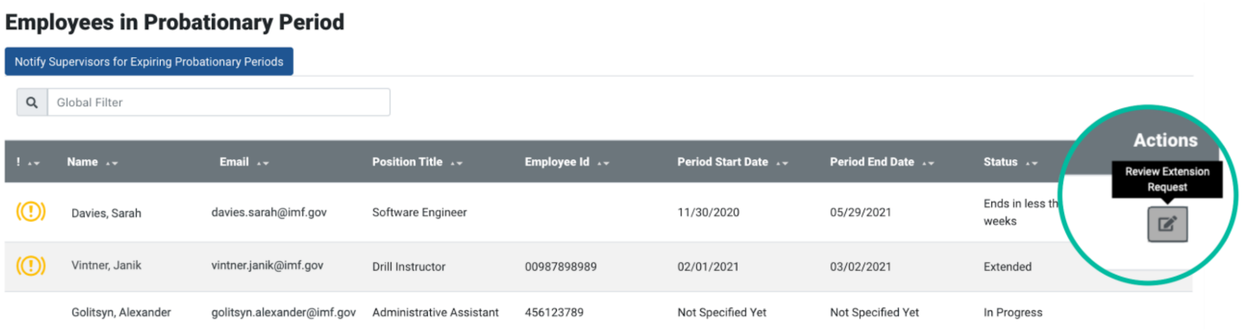
View Employees for Archival shows employees who have left the mission or are no longer under the Local Compensation Plan. Any employee listed here will also show in the active **Employee** list. You can Archive the employee, taking them out of the **Employee** and **Employees for Archival** lists and moving them to **Archived Employees**. If the employee participates in an active AWP, archival will not be possible. The AWP must be deleted or the status changed to final before archiving. From this list, you can also Remove from 'for archival' if the employee was incorrectly marked 'for archival', keeping them in the **Employee** list only.

View Archived Employees lists employee accounts previously archived. You can Restore to active to return them to the active employee list or see an employee's document History.

View Employees in Probationary Period shows the employees currently under probation, including their probationary **Status**. You will be alerted of any probations needing your urgent action. To remind all supervisors of employees nearing the end of their probation, select Notify Supervisors of Expiring Probationary Periods.

Reviewing a Probation Extension

If an LE staff member's **Rating Supervisor** has asked for a probation extension, select the **Review Extension Request** action for that employee.



Use the action to review a probationary extension request.

This brings up details of the request including the supervisor's written justification. If you're happy with the request, type in the number of days granted then **Approve** the extension. Otherwise, you can **Reject** the request and the employee's probation will end as previously agreed.

SYNCING DATA TO RCA

Use **Sync Employee Roles** to update roles and performance pools from GoMBC to the **Reward Calculation Application (RCA)**. Pools will only be synced if a pool supervisor exists.

Manage Employee Acknowledgement Role (EAR)

When an LE Staff employee does not have access to an official Government account, a supervisor can be assigned the employee acknowledgement role 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 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.

Post HR will take the following actions to set up the employee acknowledgment role.

1. Assign the employee acknowledgement role (see section **Assign Employee Acknowledgement Role**)
2. Educate employee and supervisor on their roles and responsibilities when using the EAR function
3. Upload the acknowledgement form with the employee's signature and place the signed hard copy into the employee's EPF

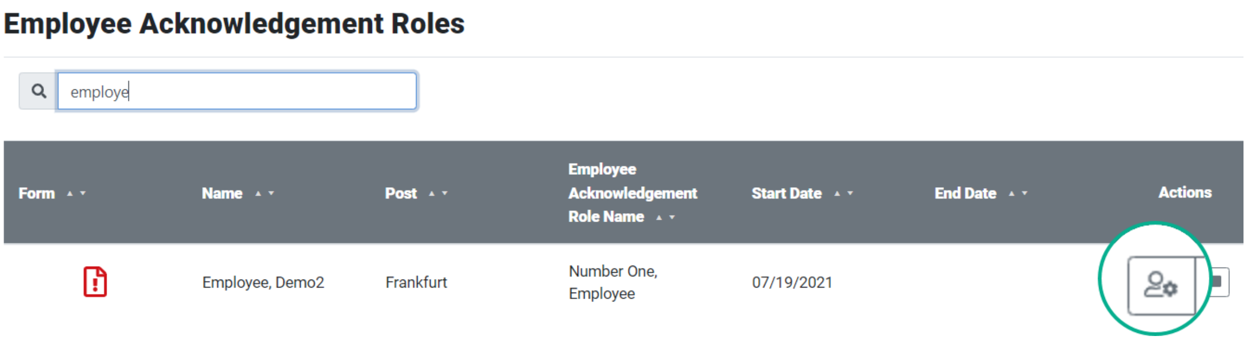
Once these actions are taken, the supervisor can perform all actions within GoMBC on behalf of the employee. Any actions taken by the supervisor will be clearly marked with 'on behalf of' in the system and on all documentation (Ex. JF-50D printouts). HR should make sure the signed EAR form is on file BEFORE the supervisor takes any action on behalf of the employee.

UPDATE EMPLOYEE ACKNOWLEDGMENT ROLE

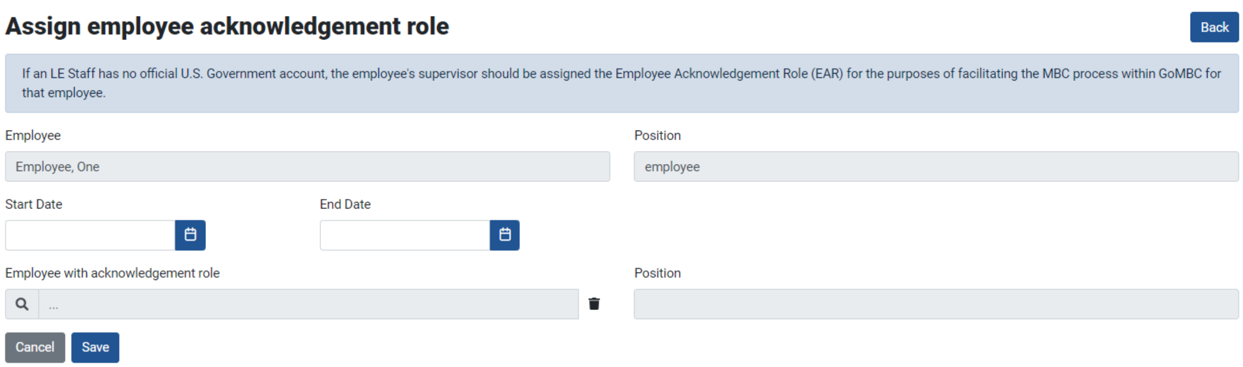
The initial assignment of the Employee Acknowledgment Role must be done from Manage Employees and is covered in the **Assign Employee Acknowledgment Role** section.

Once the role has been assigned to an employee, they will appear in the Employee Acknowledgement Roles screen.

To update or change the role, select the **Assign employee acknowledgement role** icon.

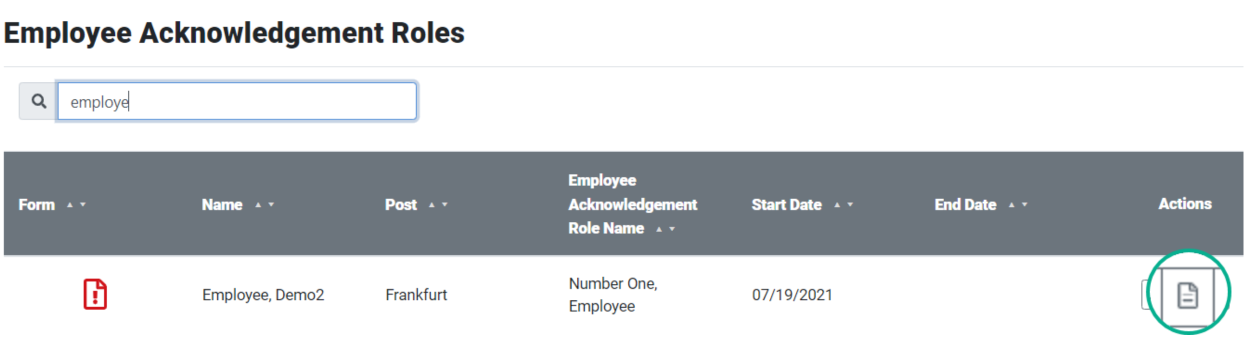


From here you can change the date range for the employee acknowledgement role or update the supervisor that will serve in this role.

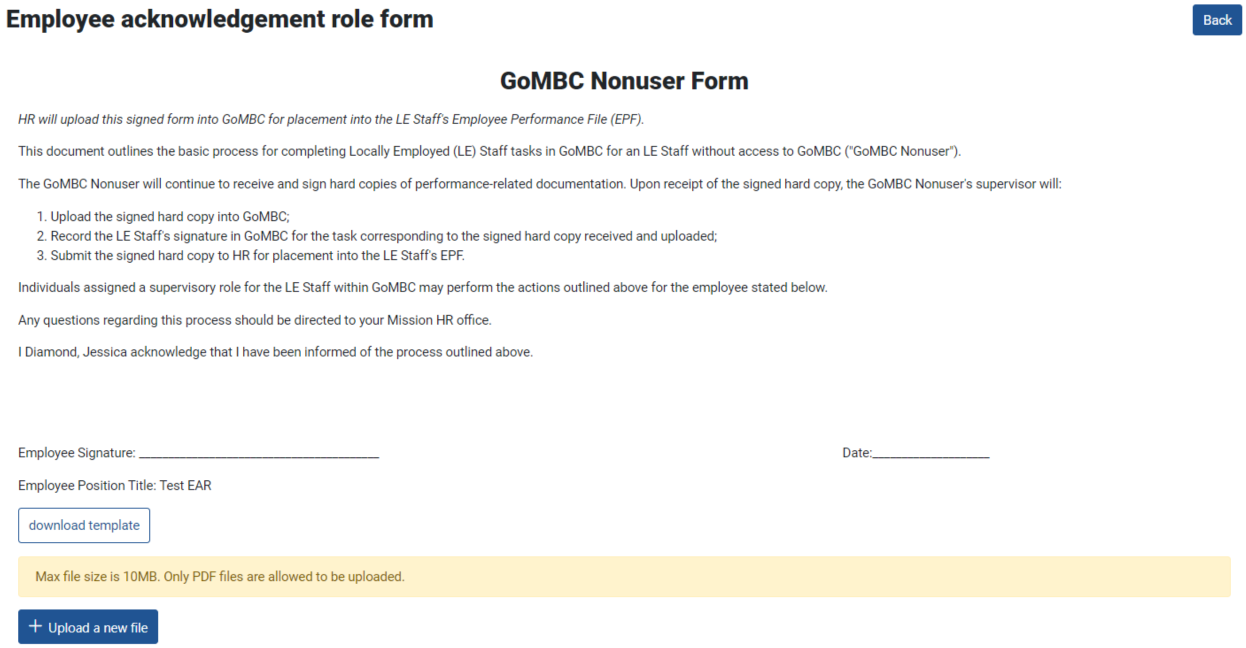


UPLOADING THE ACKNOWLEDGEMENT FORM

To upload the signed acknowledgement form to allow for the employee acknowledgement role, select the **Preview** icon from the **Employee Acknowledgement Roles** page.



A preview of the acknowledgement form will appear. If an acknowledgement form has not been uploaded, you can either **download template** or **+Upload a new file**. If a form has been uploaded, your options are: **download** the uploaded form or **+Update file**, which will overwrite the existing EAR acknowledgement form. The signed hard copy should be placed into the employee's EPF.



Employee acknowledgement role form

Back

GoMBC Nonuser Form

HR will upload this signed form into GoMBC for placement into the LE Staff's Employee Performance File (EPF).

This document outlines the basic process for completing Locally Employed (LE) Staff tasks in GoMBC for an LE Staff without access to GoMBC ("GoMBC Nonuser").

The GoMBC Nonuser will continue to receive and sign hard copies of performance-related documentation. Upon receipt of the signed hard copy, the GoMBC Nonuser's supervisor will:

1. Upload the signed hard copy into GoMBC;
2. Record the LE Staff's signature in GoMBC for the task corresponding to the signed hard copy received and uploaded;
3. Submit the signed hard copy to HR for placement into the LE Staff's EPF.

Individuals assigned a supervisory role for the LE Staff within GoMBC may perform the actions outlined above for the employee stated below.

Any questions regarding this process should be directed to your Mission HR office.

I Diamond, Jessica acknowledge that I have been informed of the process outlined above.

Employee Signature: ______________________________ Date:______________

Employee Position Title: Test EAR

download template

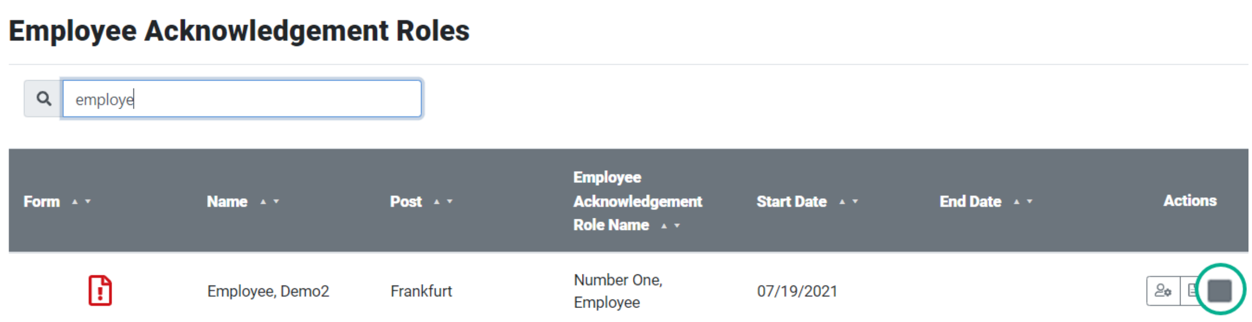
Max file size is 10MB. Only PDF files are allowed to be uploaded.

+ Upload a new file

- This icon indicates that no document is uploaded.

STOP EMPLOYEE ACKNOWLEDGMENT

To end the employee acknowledgment role for the employee, choose the **Stop Employee Acknowledgement** icon. Once selected, the supervisor can no longer take actions on behalf of the employee and the employee will be removed from the Employee Acknowledgment Roles screen.



Employee Acknowledgement Roles

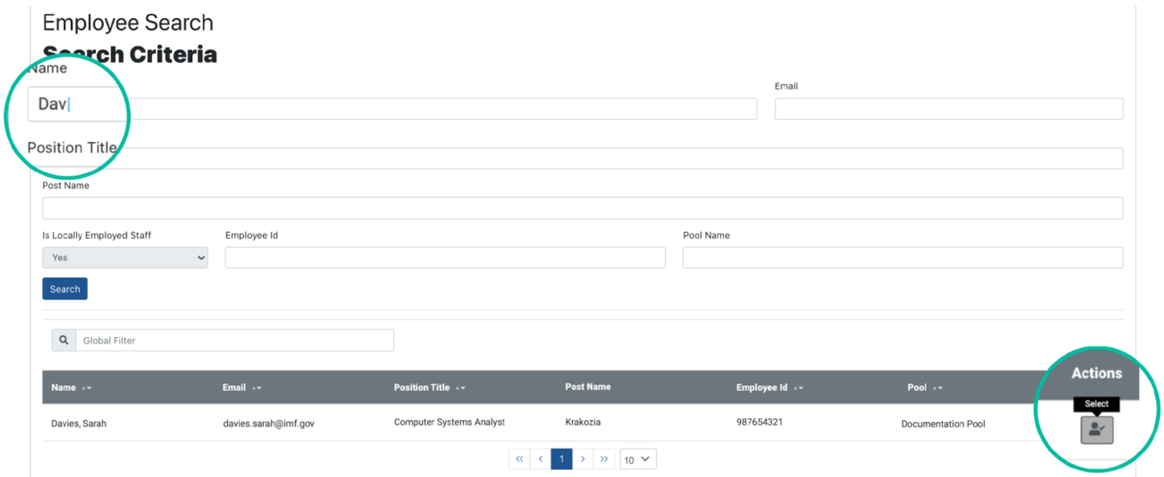
employe

Form	Name	Post	Employee Acknowledgement Role Name	Start Date	End Date	Actions
	Employee, Demo2	Frankfurt	Number One, Employee	07/19/2021		

ASSIGN ROLES

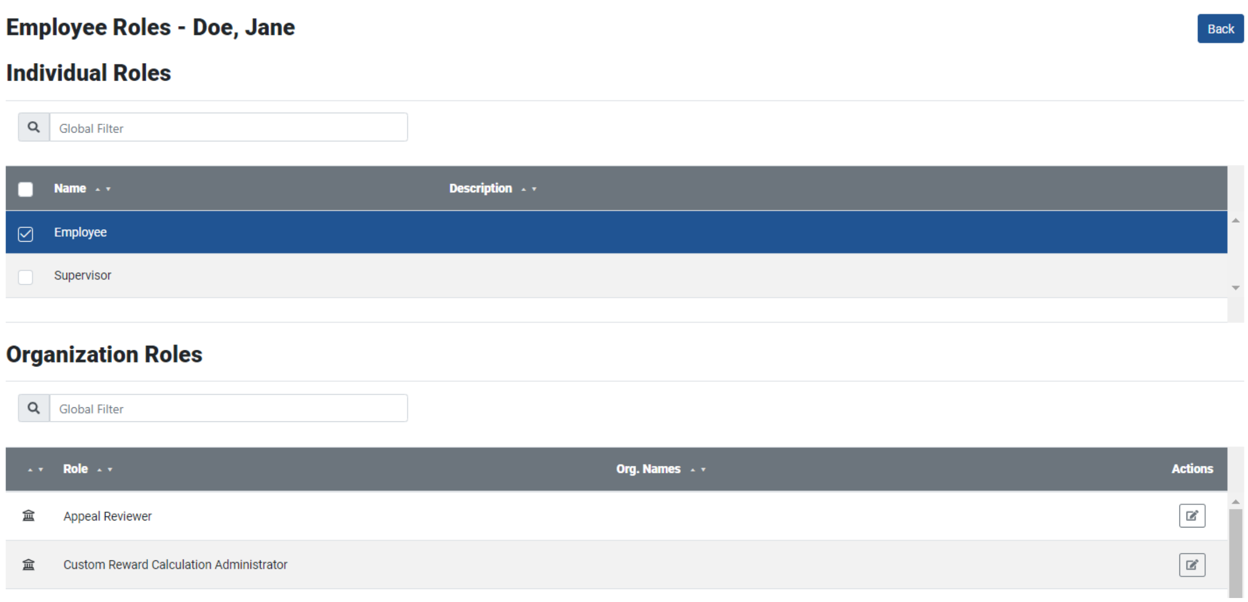
This menu option is another way (along with **Manage Employees**) to assign GoMBC roles and permissions to an employee.

Start by finding someone using **Employee Search**, then Select your chosen employee.



Mission/Post Administrators can view both **Individual** and **Organization** roles the employee holds, while Mission/Post Managers can view Individual roles only. Individual roles cover roles that apply to specific employees, while organization roles cover roles that apply to all of the Mission or Post.

A person can hold several roles in GoMBC based on their employment type and job duties.



For more information on each role, see the **Understanding Roles** section. For instructions on modifying an employee's roles, see the **Modifying the Employee's Roles** section.

Registrations

This section shows any new USDH employees waiting for you to approve their GoMBC account. This is also the place to add new USDH staff members directly.

- Locally-employed staff are imported automatically from the **Overseas Personnel Service (OPS)**. Please don't accept GoMBC registrations from LE staff.

The table lists employees who registered when they first signed into the application.

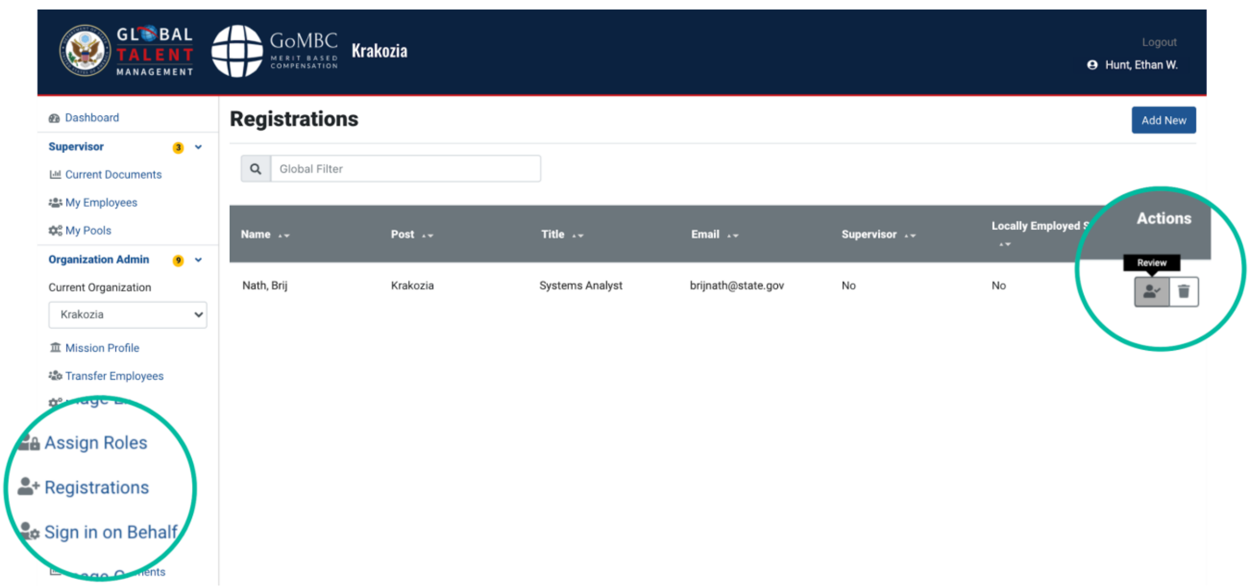
Name is the employee's name.

Post is the post they work at.

Title is their position title.

Email is the government email address where they receive notifications.

Actions to take here are to **Review** the pending registration or **Remove** it completely.



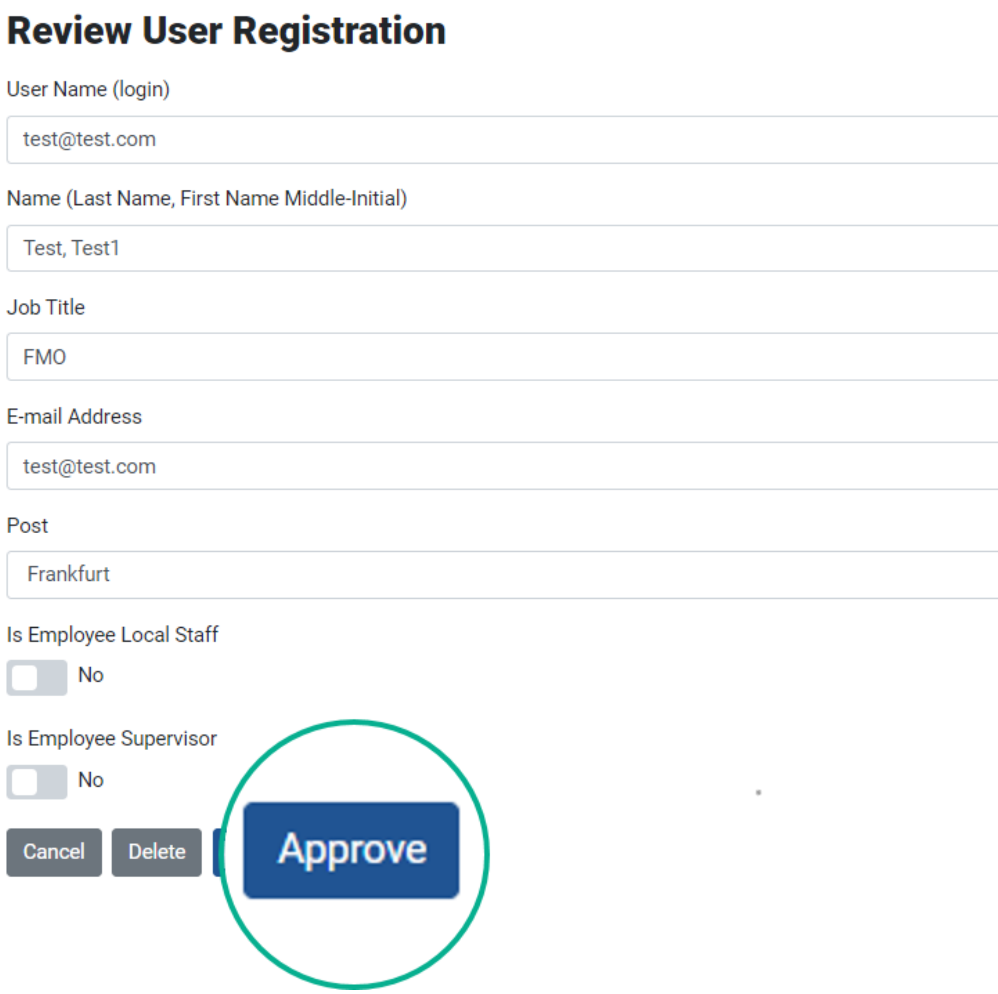
Use the actions to review or remove pending registrations.

- Find a pending registration quickly by using the **Global Filter** to search on any of these details.

REVIEWING A PENDING REGISTRATION

Pick the **Review** action to check a pending registration request for a USDH staff member. You will see the details we covered above. Select any of these fields to add or update the details. Don't create duplicate registrations for LE staff. Their accounts should be created automatically from OPS.

You can **Save** your changes at any time. Once you're happy with everything, go ahead and **Approve** the registration. This notifies the employee that they're ready to go.



- You can also **Delete** a pending request but be careful — this removes it from GoMBC completely.

Adding a New User

Use **Add New** to register user accounts in GoMBC for USDH staff members at your post or mission. LE staff are added automatically from OPS.

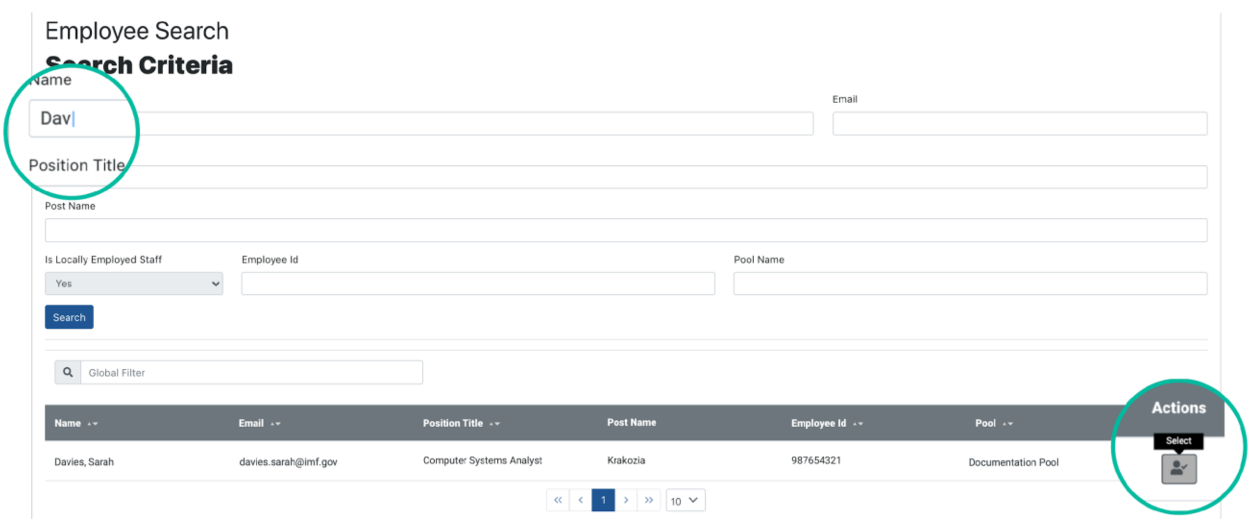
For **User Name,** use the employee's government email address. This is the account they will use to log into GoMBC. Then, add their **Name** (last name, first name, middle initial), **Job Title**, **Email Address** (where they receive notifications), the **Post** they work at, and their **Grade**. If they are a supervisor, select Yes on the **Is Employee Supervisor** field, this will automatically give them the supervisor role.

You're all done. **Save** your changes at any time or **Save and Approve** the registration in one step. Approval of the registration notifies the employee that their GoMBC access is now ready.

Sign in on Behalf of User

This tool allows administrators to access GoMBC as any other registered user. You're able to see what they see and perform actions as them.

Select **Sign in on Behalf of User** from the Organization Admin menu, then select the search bar to bring up **Employee Search**.



Use Employee Search to locate someone.

Find the user you want to sign in as, either by **Name**, **Email**, **Position Title**, or **Post** name. If the person you want is LE staff, set **Is Locally Employed Staff** to **Yes** to restrict the search. You can also locate them by employee ID or pool.

Hit **Search** to return the results. For your chosen employee, the **Action** to take is **Select**.

GoMBC now returns you to the dashboard, notice at the top that you're now **Signed in on behalf of...** the person you selected. Both the dashboard and the main menu display as this person would see them.

The top area of GoMBC shows who you're currently signed in as.

From here you can access their documents and (if they're a supervisor) their employees. You can create, update, acknowledge, endorse or approve documents as though you were the person you're signed in as. Any action you take is recorded in the Status History and the JF-50D form as being **on behalf of** the other person.

- While you're signed in on behalf of someone else, you only have the same permissions to act on documents as they do.

SIGNING OUT

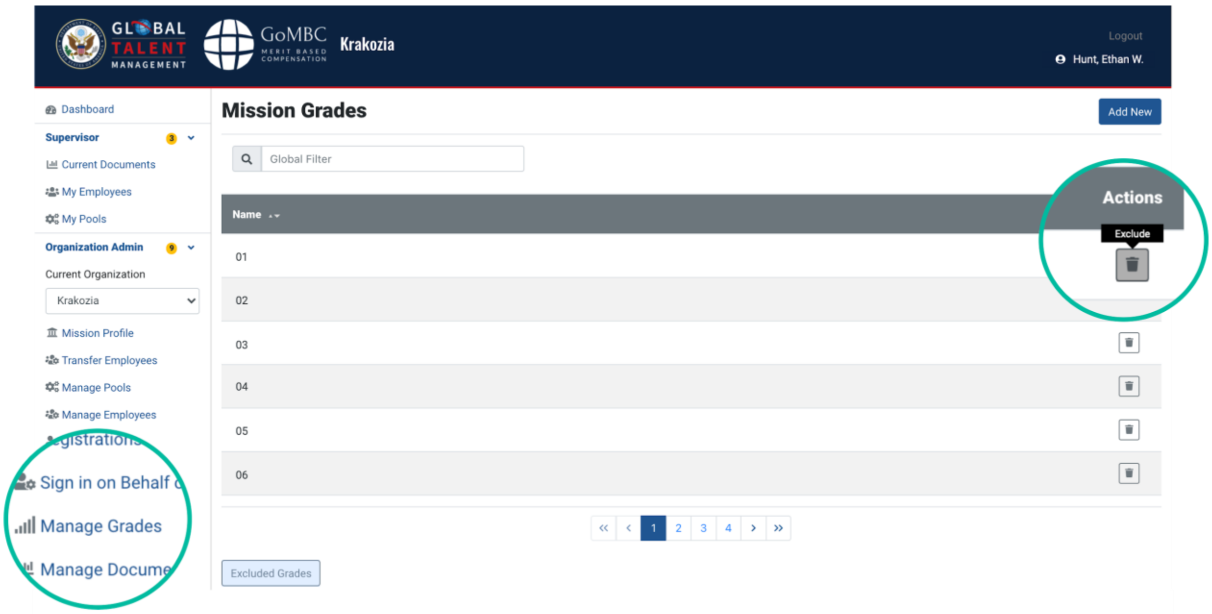
Sign out of the other person's account to get back to your own. Up at the top there's a link to Sign out of their account. You will stay signed into GoMBC but just as yourself.

If you choose Logout here, you will exit from GoMBC completely.

Manage Grades

Use this section to customize the grade levels that employees can hold in your post or mission.

The list shows any grades created previously. Under **Actions**, you're able to **Exclude** any grades that don't apply to your location. This moves them to the **Excluded Grades** area, where you can later **Include** them again if needed.



CREATING NEW GRADES

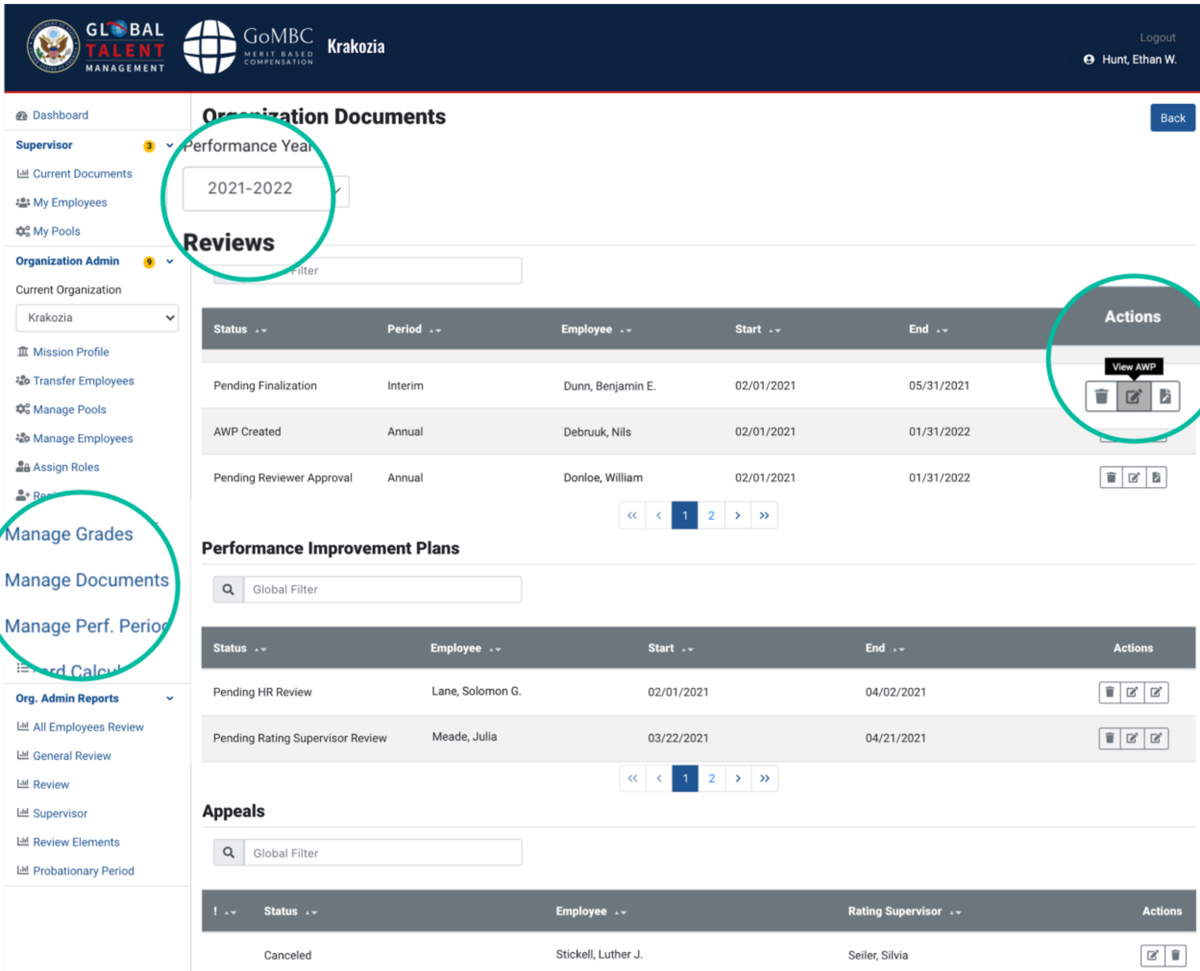
Use **Add New** to set up a new grade level. Make sure the name you give the grade matches the record in OPS (such as 06 or 07, not FSN-6 or FSN-7).

Grades (except those excluded) are then available across GoMBC, such as when setting up employee accounts.

Manage Documents

This area organizes performance documents for your post or mission into **Reviews**, **Performance Improvement Plans**, and **Appeals**.

You can access documents for past, present, and future rating cycles. Start by selecting the **Performance Year** you want to focus on.



Take actions on each type of document for the selected performance year.

REVIEWS

This section holds current **Annual Work Plans (AWPs)** and **Employee Performance Reports (EPRs)**, showing summary data for each document. Each review for the selected performance year will be listed here.

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

Period shows whether the EPR's review period is **Annual** or **Interim**.

Employee names the person this document is about.

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

Actions direct you to View AWP (or View EPR), Delete Document, or Change Review. Changing the review allows you to change the AWP or EPR status to any status, change the review dates, and change the review period from annual to interim or vice versa.

PERFORMANCE IMPROVEMENT PLANS

This section lists any employee **Performance Improvement Plans (PIPs)** currently in place.

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 Manage Performance Improvement Plan (where as HR you will Approve or Return the plan before it is sent to the employee or the unsuccessful endorsement by the Rating Supervisor), Delete Document, or Change PIP Status. Changing PIP status is available for any PIP that has not completed the review process and allows you to move the PIP to any previous review point in its history. Once a PIP is reviewed, you can't change its status, but you can View Performance Plan History to get a completed **JF-50B** form ready for printing.

APPEALS

This section shows **Appeals** lodged by employees against their performance review. You will be alerted of any appeals needing your urgent action.

Status tracks progress of the appeal process.

Employee names the person who lodged the appeal.

Rating Supervisor names the person who conducted the original performance review.

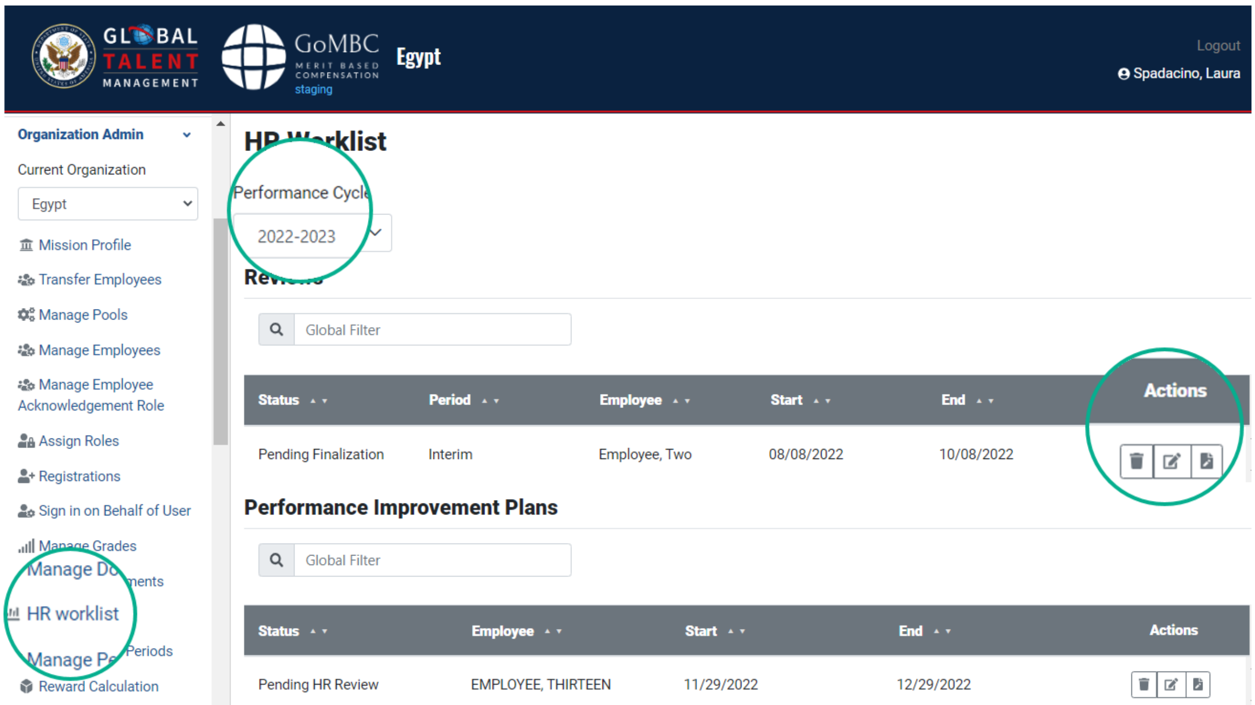
Actions direct you to View Appeal or Delete Appeal if no longer needed. Viewing the appeal shows any employee and supervisor comments about the appeal. The View Review action found there links you to the EPR appealed against.

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

HR Worklist

This section lists all performance documents requiring HR review and action. The performance documents will be divided into **Reviews** and **Performance Improvement Plans**.

You can access documents for past, present, and future rating cycles. Start by selecting the **Performance Year** you want to focus on.



Reviews

This section lists **Employee Performance Reports (EPRs)** that are either Pending HR Approval or Pending Finalization. The summary data for each document is shown below.

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

Period shows whether the EPR's review period is **Annual** or **Interim**.

Employee names the person this document is about.

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

Actions direct you to View EPR, Delete Document, or Change Review. Changing the review allows you to change the EPR status to any status, change the review dates, and change the review period from annual to interim or vice versa.

PERFORMANCE IMPROVEMENT PLANS

This section lists **Performance Improvement Plans (PIPs)** either Pending HR Review or Pending HR approval.

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.

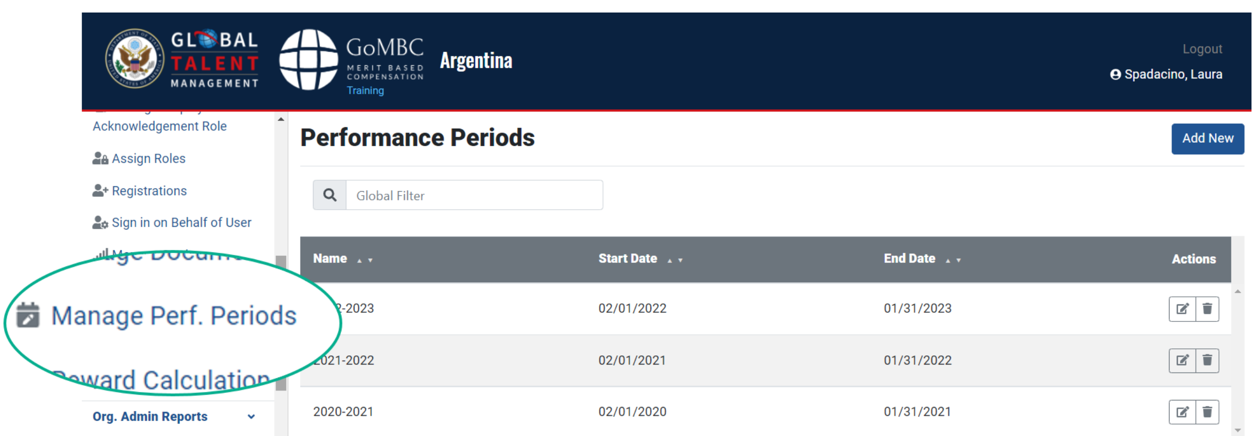
Actions direct you to Manage Performance Improvement Plan (where as HR you will Approve or Disapprove the plan before it is sent to the employee or the unsuccessful endorsement by the Rating Supervisor), Delete Document, or Change PIP Status. Changing PIP status allows you to move the PIP to any previous review point in its history.

MANAGE PERFORMANCE PERIODS

- Only available to the **Mission Administrator** and **Mission Manager**.

This is where you will define or adjust the dates of rating cycles in your mission. These dates determine when **Annual Work Plans** should be created, **Mid-year Discussions** held, and **Employee Performance Reports** scored.

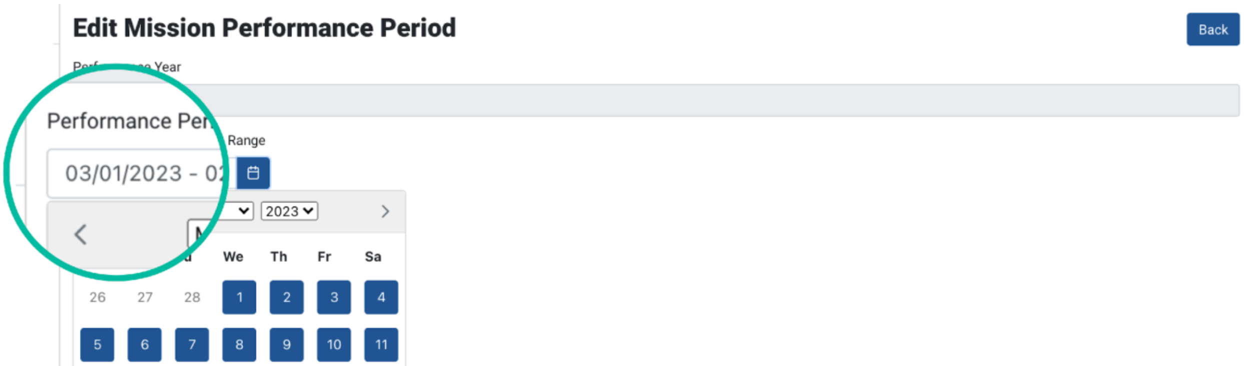
The list shows the **Name** of each performance period, its **Start Date** and **End Date**, and actions to Edit or Remove the entry.



CREATING OR EDITING A PERFORMANCE PERIOD

To set up a new performance period, select Add New. The **Performance Year** is set automatically based on the next available range. To edit an existing period, select the Edit action for that period from the list.

Use the calendar picker to set a **Date Range**. Select the date the period should start, then select again to set the end date before you Save your changes.



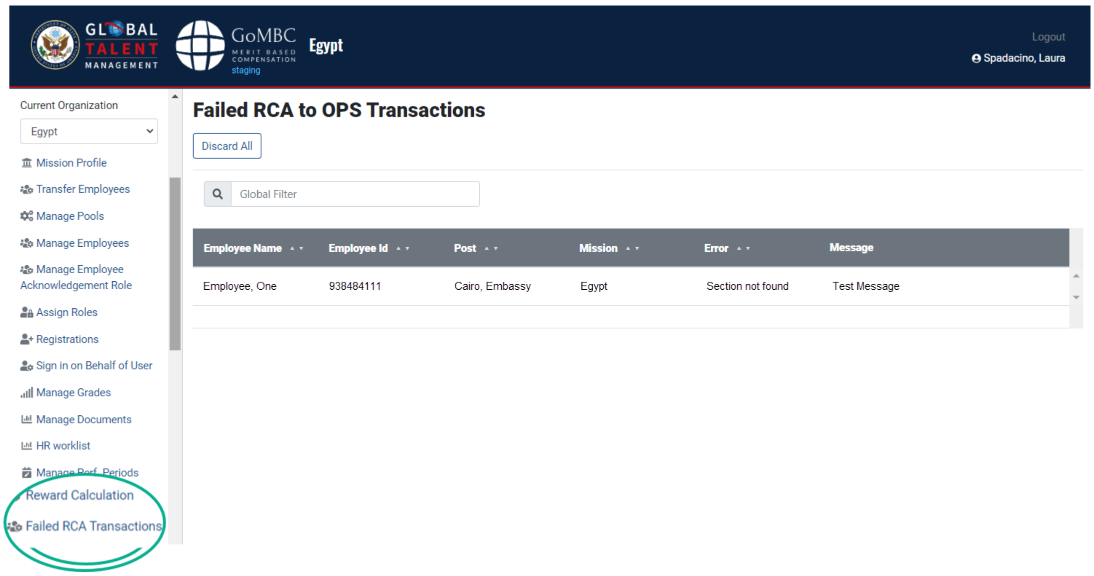
REWARD CALCULATION

- Only available to the **Mission Administrator**, **Mission Manager**, and **Reward Calculation Mission Admin**.

This links to the Reward Calculation Application, which is covered in the **Reward Calculation** section.

Failed RCA Transactions

This section will list any errors that were received from OPS upon submission from RCA. If any errors are received, they will be received within an hour. You will only be able to view the errors here. If errors appear, please open a ticket with **ADG-Support@state.gov** for resolution.



If no errors are received within an hour, the data passed the initial validation, and a mass update group will be created when the OPS batch job is run. An email notification will be sent upon mass update group creation. For mass update processing within OPS, refer to the **OPS Mass Update Procedures and Job Aids** SOP on the OPS SharePoint site.

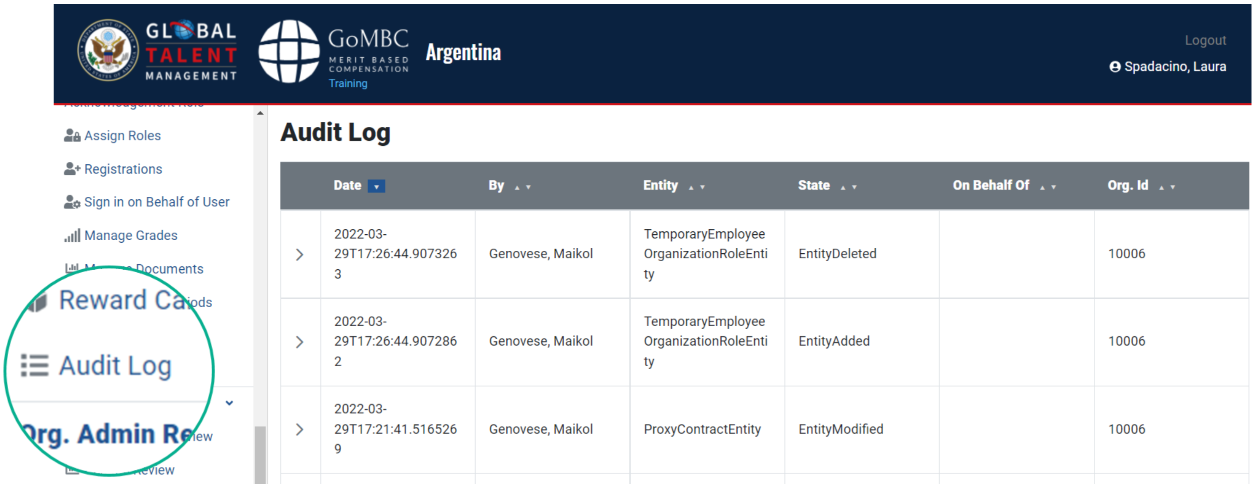
Audit Log

This automatically records every action performed by administrators in GoMBC. It provides an audit trail of activity and is a useful aid to diagnose technical problems.

Date displays the timestamp of the recorded action (in Coordinated Universal Time)
By names the person who performed the action
Entity shows the conceptual object in MBC (such as an employee role, a new registration, or a performance pool) affected by the action
State describes what happened to the entity as a result of the action (such as added, deleted, or modified)
On behalf of names a second person if the action was taken on their behalf
Org ID shows the ID number of the post or mission

ACTIVITY DETAILS

Each event recorded in the log can be expanded to show further details. Use the **Expand** control to open up the entry.



The expand control reveals details of each GoMBC action logged.

Specifics will vary based on the **Entity** and its **State** but follow a similar structure.

Property lists the properties of the action performed (typically whether something is modified, created or deleted, by whom and when)

New Value details the information the **Entity** now contains (if information was deleted, this may be blank

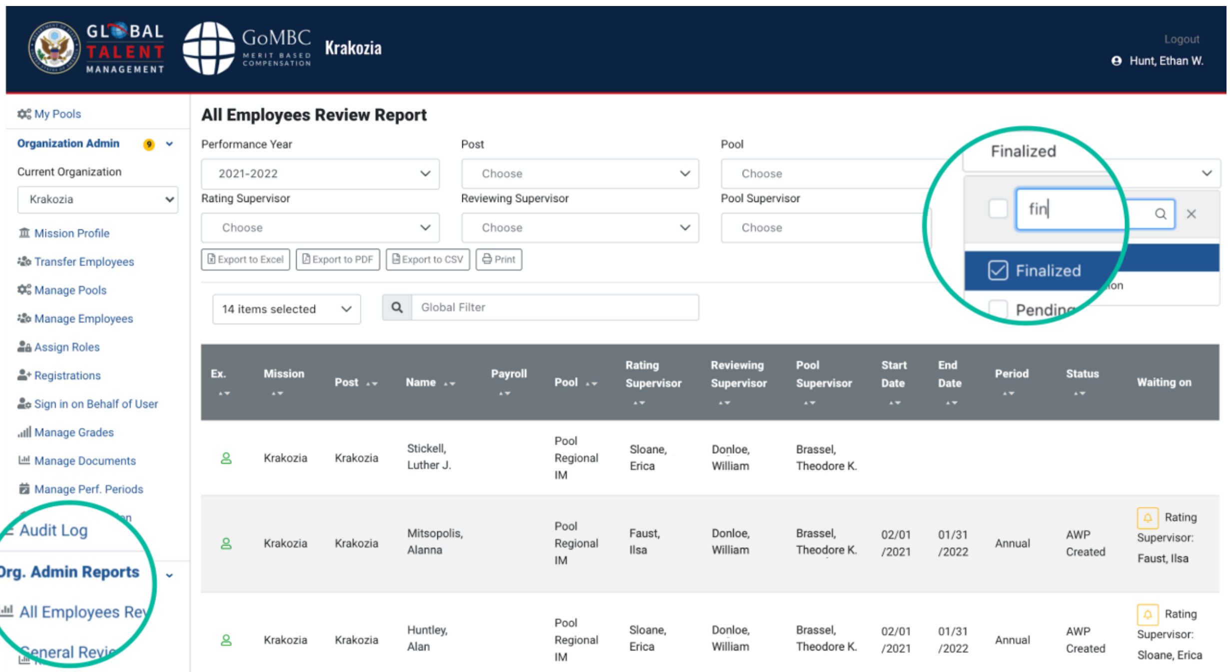
Old Value details the information the **Entity** used to contain (if a new instance of the entity was created, this may be blank)

ORGANIZATION ADMIN REPORTS

This section contains several useful summary reports on performance activity. Before we look at what each report shows, let's first run through how to use the reporting features.

RUNNING A REPORT

Configure any report to show just the information you need. Start by selecting a **Performance Year** from the dropdown. Use the remaining dropdown filters (such as **Pool**, **Rating Supervisor** or **Review Status**) to configure more reporting criteria.



Each report in this section can be customized using the filter dropdowns.

- The filters available will vary by report.

Most of these dropdown controls let you select or deselect as many options as you need. To select all the available options in a dropdown, check the box next to its **Search** bar. Or use this search to filter longer lists and find the option you're looking for.

The report updates automatically as you configure the available options.

Customizing the Table Display

In most reports, you can also choose which columns to include. Some reports feature several columns, use this feature to make your report easier to read or tailor it to your specific needs.

Where available, you'll find the **Items Selected** dropdown just above the table. By default, this is set to show all available columns. Use it to remove columns you don't need.

- Certain columns will be required for each report. You can't deselect these.

Exporting the Report

Export your customized report to popular formats for further review. Export options available vary by report.

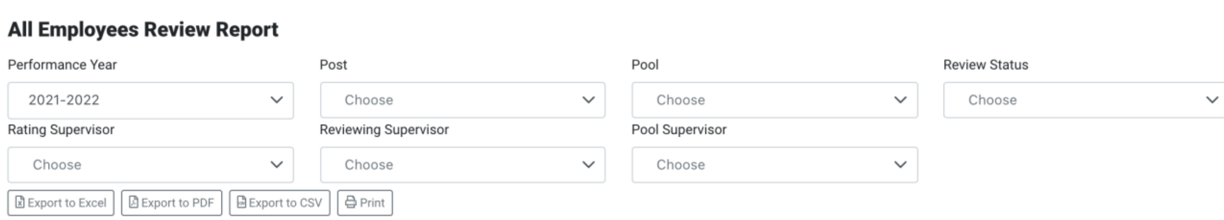
Export to Excel downloads a Microsoft Excel (.xlsx) spreadsheet.

Export to PDF exports to an Adobe PDF document. There's a second step to **Download PDF** once exported.

Export to CSV downloads a CSV (comma-separated values) file.

Print lets you print the table directly from your browser.

ALL EMPLOYEES REVIEW

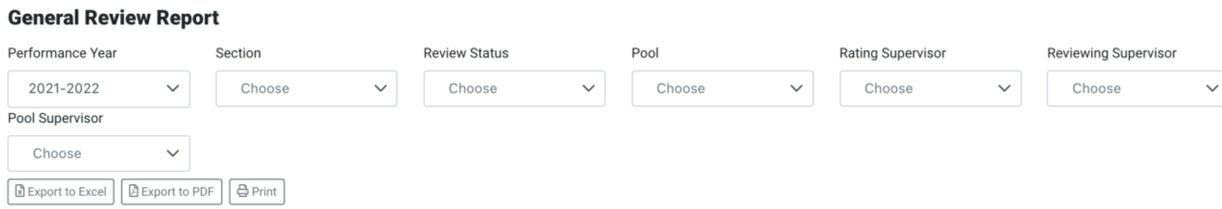


This report covers all LE staff members, regardless of whether they have an active **Annual Work Plan**.

Where an employee does have an AWP in your selected **Performance Year**, you can see its current **Status** and who its **Waiting On**. From here you can Notify Supervisor of documents that need their attention.

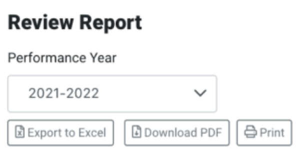
Actions to take here are View Annual Work Plan and (if available) View Employee Document History.

GENERAL REVIEW



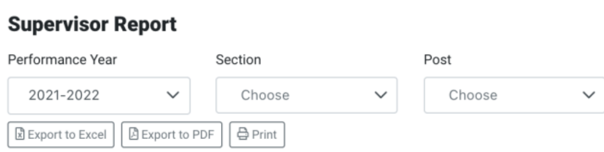
This report is focused on **Employee Performance Reports** for your selected **Performance Year.** You will see a breakdown of each **Annual** and **Interim** review within the period, including details of the employee's **Section**, **Status**, and **Payroll ID**.

REVIEW



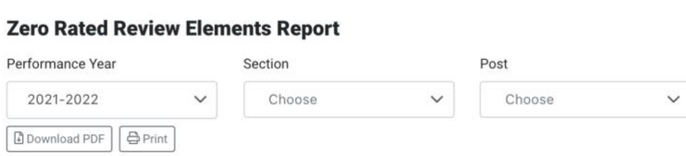
This report shows running totals of AWP or EPR review statuses across each **Section** of your mission.

SUPERVISOR



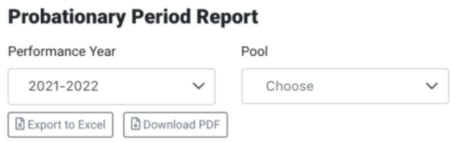
This report shows the assigned **Rating Supervisors** in your post or mission, organized by **Section**. Use the **Expand** control to reveal the name of each supervisor within a section. For each supervisor the table shows totals of performance reviews **In Progress** and **Complete**.

REVIEW ELEMENTS



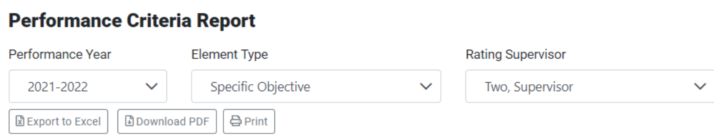
This report looks at specific employee **Performance Criteria** given a zero rating within each **Section** of your mission. For each employee in the list, use the **Expand** control to reveal which criteria received a zero-performance rating.

PROBATIONARY PERIOD



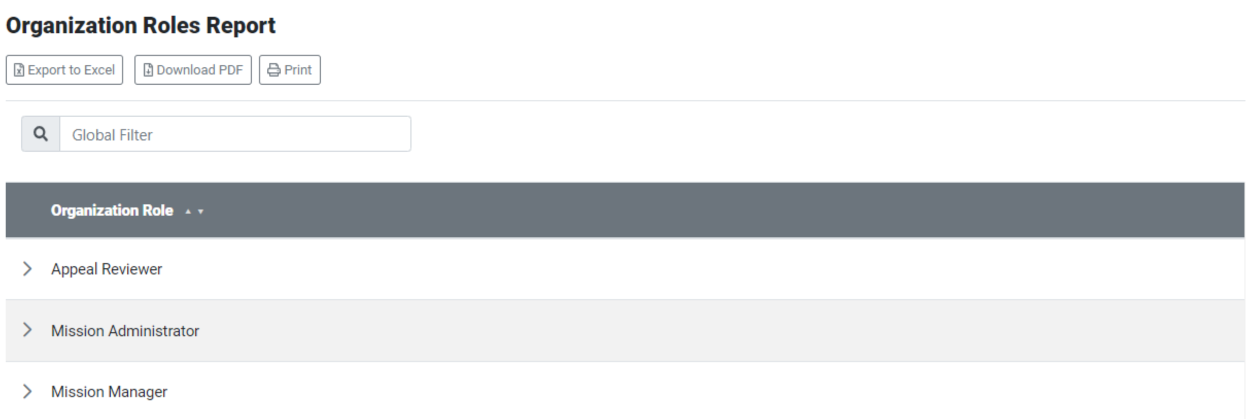
This report lists all employees currently on probation, including the **Status** and **End Date** (if specified) of each period.

PERFORMANCE CRITERIA



This report allows you to view all performance criteria defined by a selected supervisor.

ORGANIZATIONAL ROLES



This report allows you to view all users with organizational roles in your Mission or Post.

HR ACTIONS ON PERFORMANCE DOCUMENTS

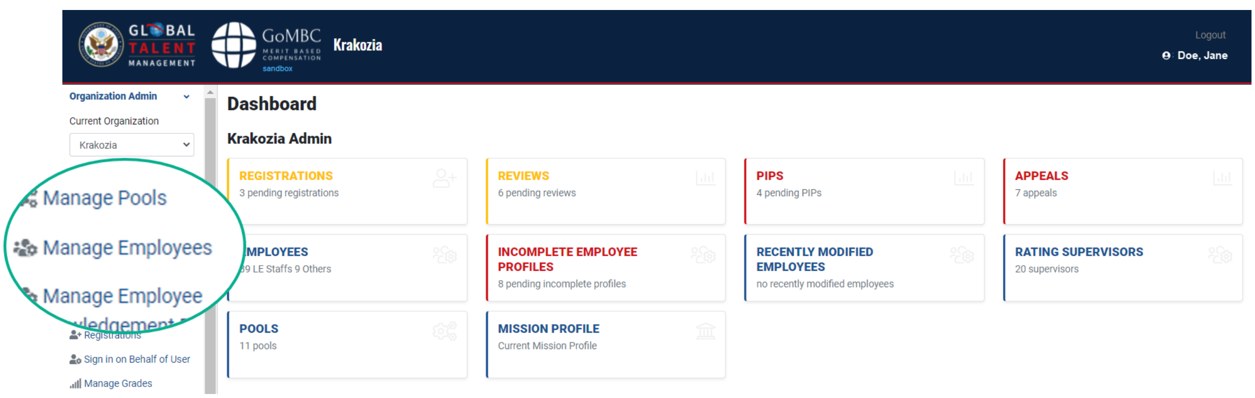
As a **Mission Administrator**, **Mission Manager**, **Post Administrator**, or **Post Manager**, you need to take action to approve performance documents or requests at certain stages of the performance document process. For policy guidance, please consult the **Performance Management Policy for MBC**.

- HR Actions and Dashboard notifications are available to and can be completed by everyone that hold the **Mission Administrator**, **Mission Manager**, **Post Administrator**, or **Post Manager.**

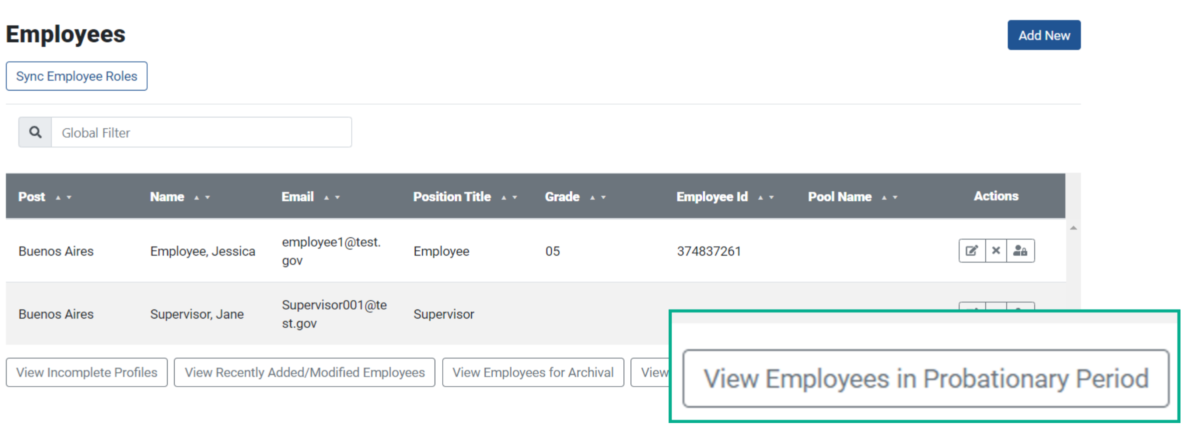
PROBATIONARY PERIOD EXTENSION

If a Rating Supervisor believes an employee in a probationary period needs more time to demonstrate successful performance, they may request to extend the probationary period. All extension requests are routed to HR for approval.

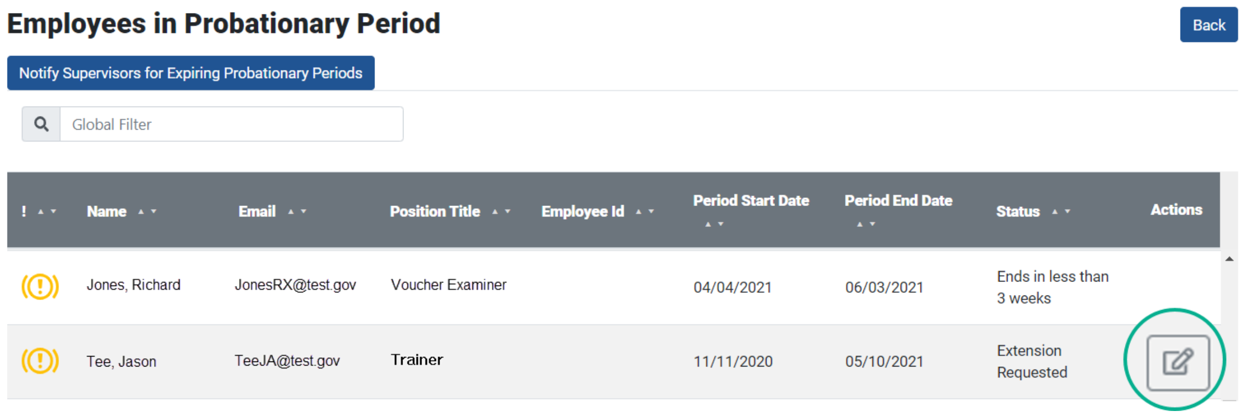
Select Manage Employees from the Organization Admin menu.



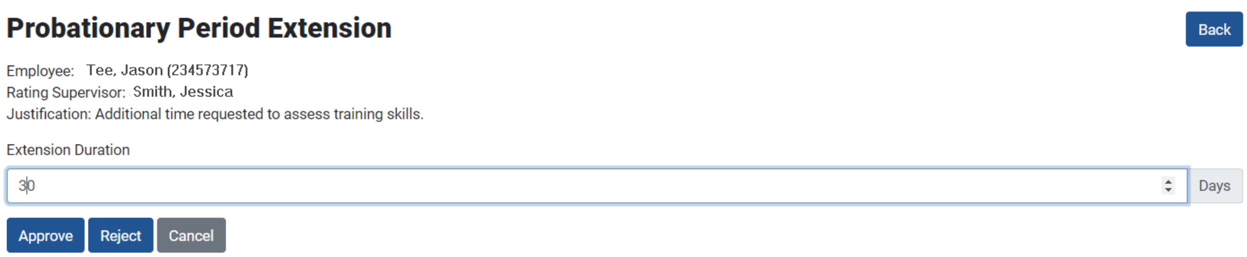
Select View Employees in Probationary Period



The list of all employees in a probationary period will display along with the probationary period status. If an extension is requested, an action button displays.



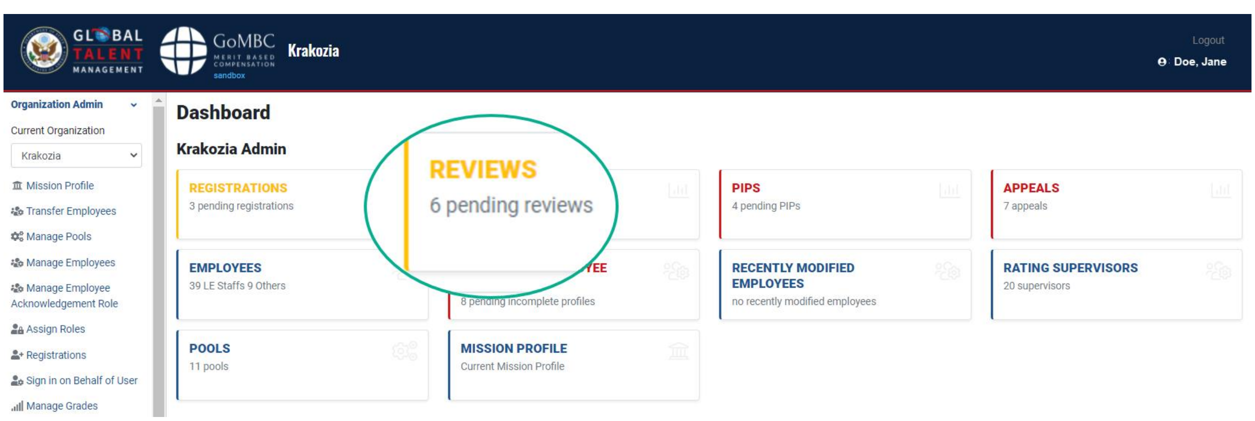
Review the justification and either enter the approved number of days for the extension and **Approve** the request or **Reject** the request.



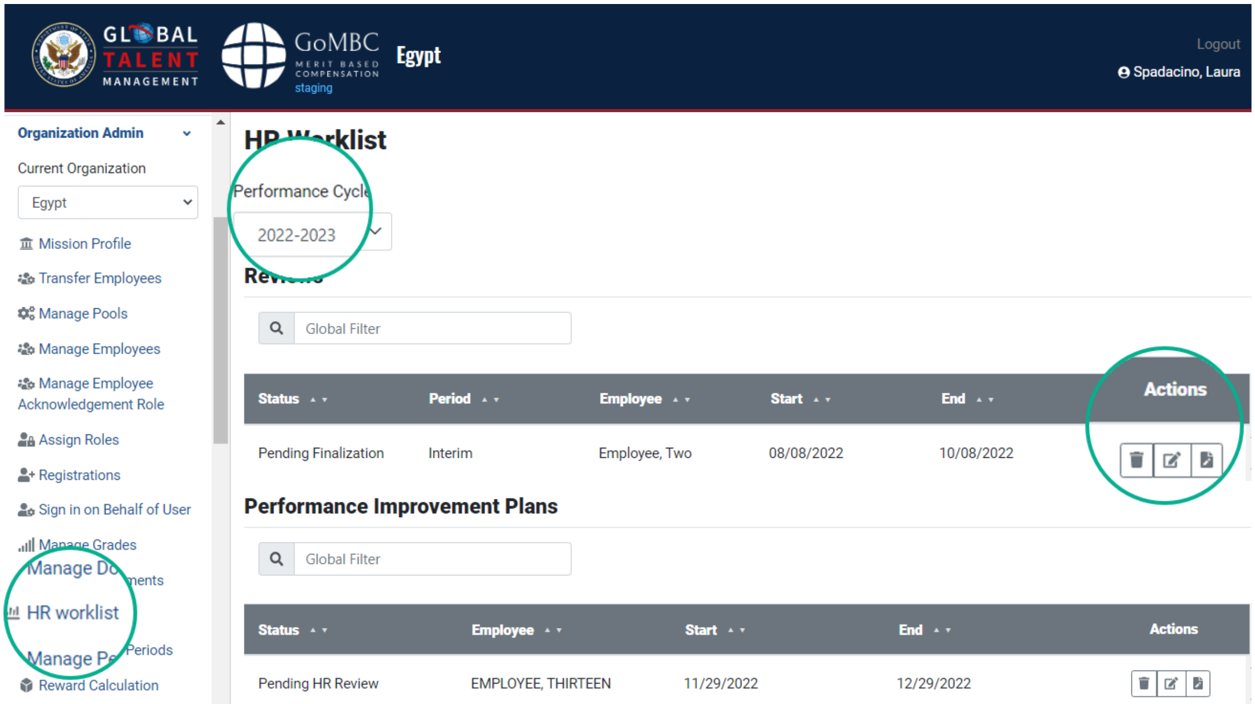
EMPLOYEE PERFORMANCE REPORTS (EPR)

Each EPR will be routed to HR twice during the end-of-year process. First, to check for inadmissible comments after the scored EPR is approved by the Pool Supervisor. Then, for finalization after the scored EPR has been reviewed by the employee.

On the dashboard, Reviews lets you know how many EPRs are pending HR action. Selecting the Reviews button will take you to Manage Documents.



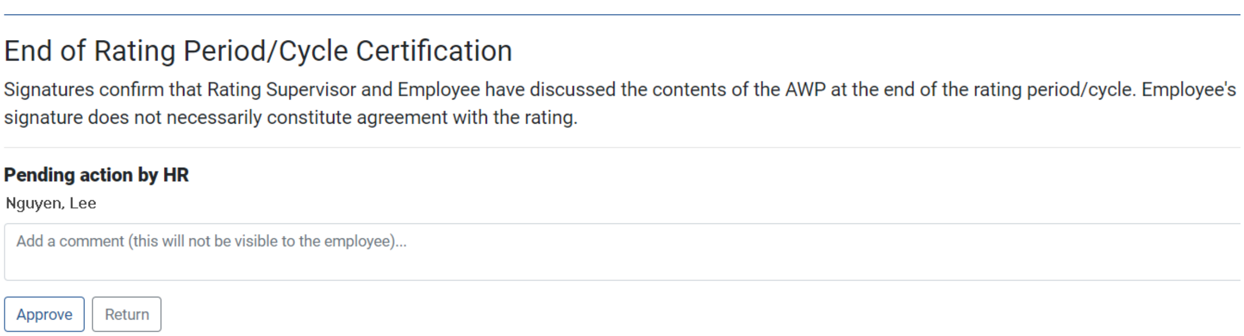
From Manage Documents, you can sort or filter by the status you would like to view. Alternatively, you can select the HR worklist menu item from the left menu. Then, select View EPR to review the document and take the action needed.



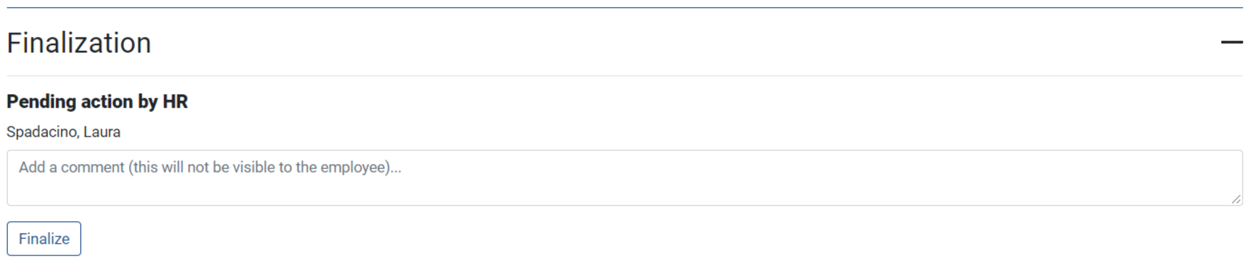
Documents **Pending HR Approval** have been reviewed by the **Reviewing Supervisor** and **Pool Supervisor**, and must be reviewed by HR for inadmissible comments. Scroll to the **End of Rating Period/Cycle Certification** section where you can either:

- Approve to send the document to the Rating Supervisor for release, OR
- Disapprove to send the document back to the Rating Supervisor for modification.

Any comments you make here will not be seen by the employee.



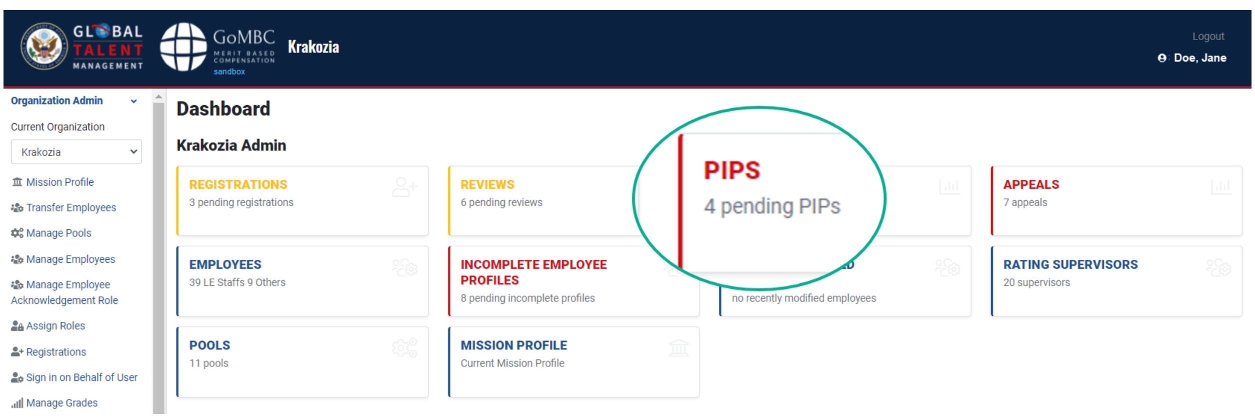
Documents Pending Finalization, have gone through the entire EPR process and require HR action to close the EPR. Scroll to the **Finalization** section and **Finalize** the document. Any comments you make here will not be seen by the employee.



PERFORMANCE IMPROVEMENT PLANS

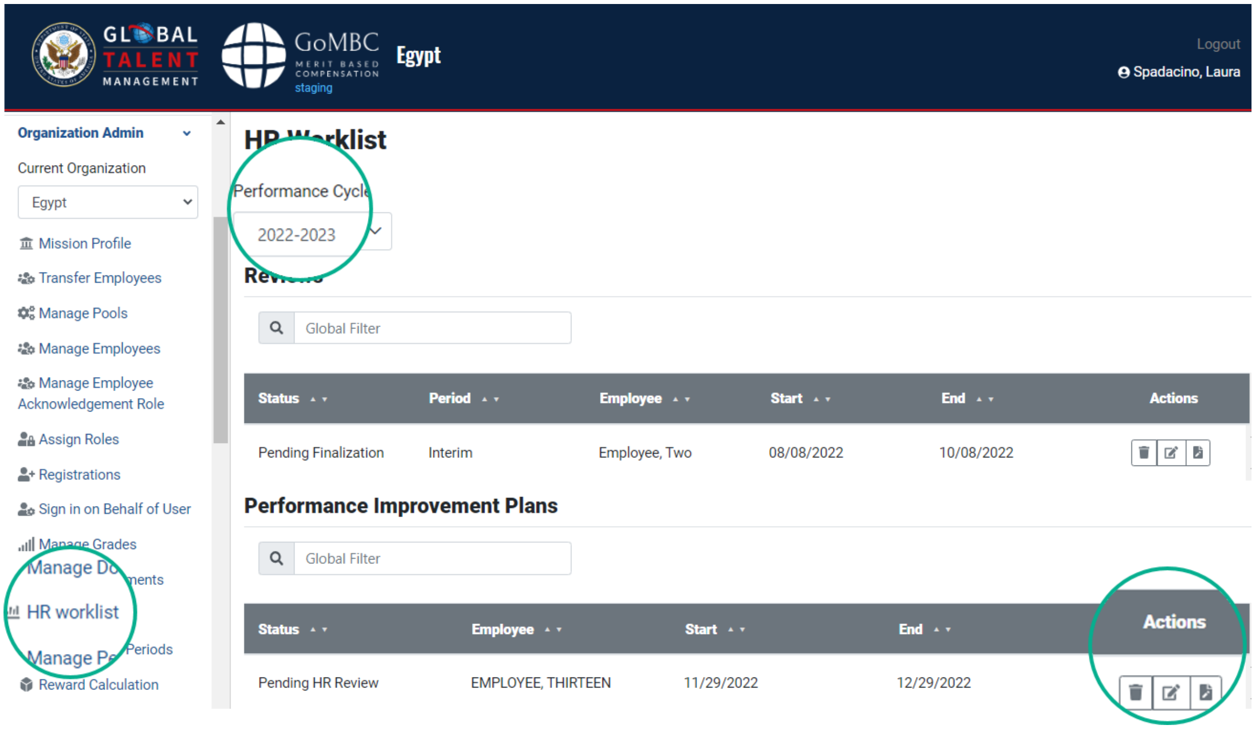
HR must review a PIP after a Rating Supervisor creates and endorses it, after the Rating Supervisor requests a PIP extension, and after a Rating Supervisor finalizes the PIP with an unsuccessful determination.

On the dashboard, PIPs lets you know how many are pending HR action. Selecting the PIPs button will take you to Manage Documents.



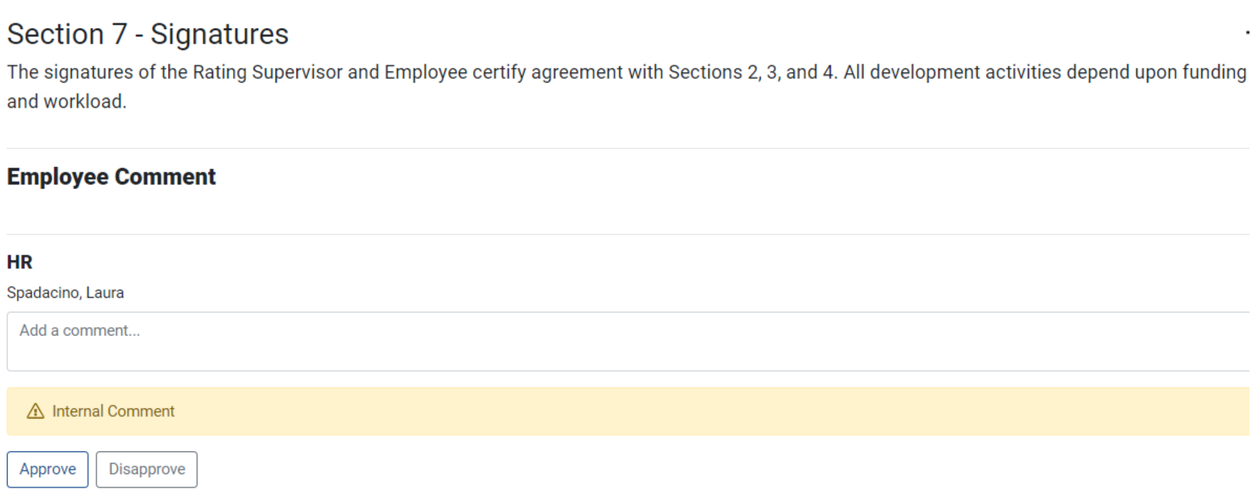
From here, you can sort or filter by **Pending HR Review** to view PIPs that are awaiting your action. Alternatively, you can select HR worklist to only view PIPs that are pending HR action.

Then, select Manage Performance Improvement Plan.



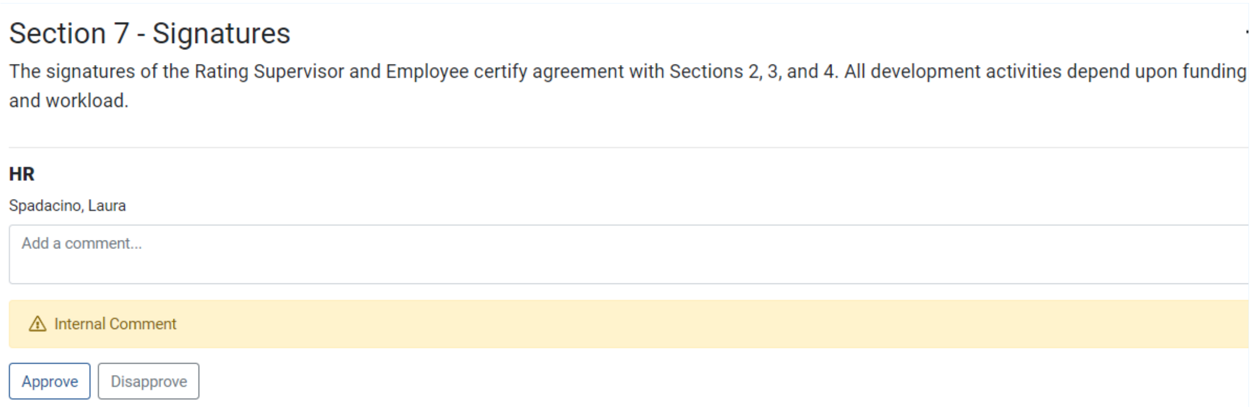
PIPs Pending HR Review have either been created and endorsed by the Rating Supervisor or an extension has been requested by the Rating Supervisor. Your action will be to review the document, scrolling to **Section 7 – Signatures.** From here you can either:

- Approve to notify the Rating Supervisor to share the PIP with the employee, OR
- Disapprove to return the PIP to the Rating Supervisor for further editing

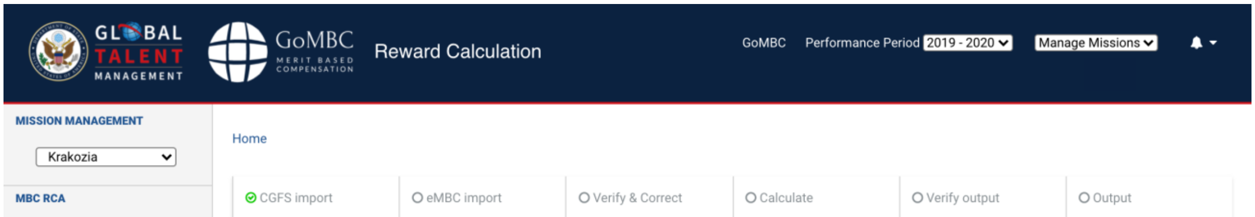


PIPs Pending HR Approval have been finalized unsuccessfully by the Rating Supervisor. Your action will be to review the document, scrolling to **Section 7 – Signatures.** From here you can either:

- Approve to finalize the PIP, OR
- Disapprove to return the PIP to the Rating Supervisor a revision to the determination



Reward Calculation



The **Reward Calculation Application (RCA)** imports employee **Total Performance Scores (TPS)** from GoMBC, maps them to the employee Time & Attendance (T&A) for the year, and applies any conditions used to prorate time.

The app then calculates the correct MBC reward for each employee, creates reward letters for you to distribute, and submits data to OPS for automation of the personnel action process via the mass update tool.

Access RCA within GoMBC on any computer. See **Accessing GoMBC** to find out how.

The **Reward Calculation Mission Admin** can reach RCA from the Reward Calculation option in the **Organization Admin** menu.

After the calculation has run in RCA, **Pool Supervisors** will be invited to review and approve the results.

Roles in RCA

RCA uses **roles** to help people carry out tasks appropriate to their job. The role you hold in the app provides access to information and actions corresponding to your role in the MBC process. RCA Roles should be defined in GoMBC and synced to RCA.

Reward Calculation Mission Admin

This role can edit the **Mission Profile**, **import** employee data, run **calculations**, correct **errors** and **download** completed calculations for their mission.

- If you have the GoMBC Reward Calculation Mission Admin role, but cannot access RCA, be sure to Sync the roles in GoMBC Manage Employees.

Pool Supervisor

This role can see completed calculations for their pool(s) only and complete the first stage of approval within RCA.

Reward Calculation Approver

This role is assigned to people who will review calculations and complete the second and third stages of approval. Once synced in RCA, the user will hold this role in RCA, but they must first be assigned to the Tier 2 or Tier 3 approval before they can take approval action.

Reward Calculation Reporting FMO

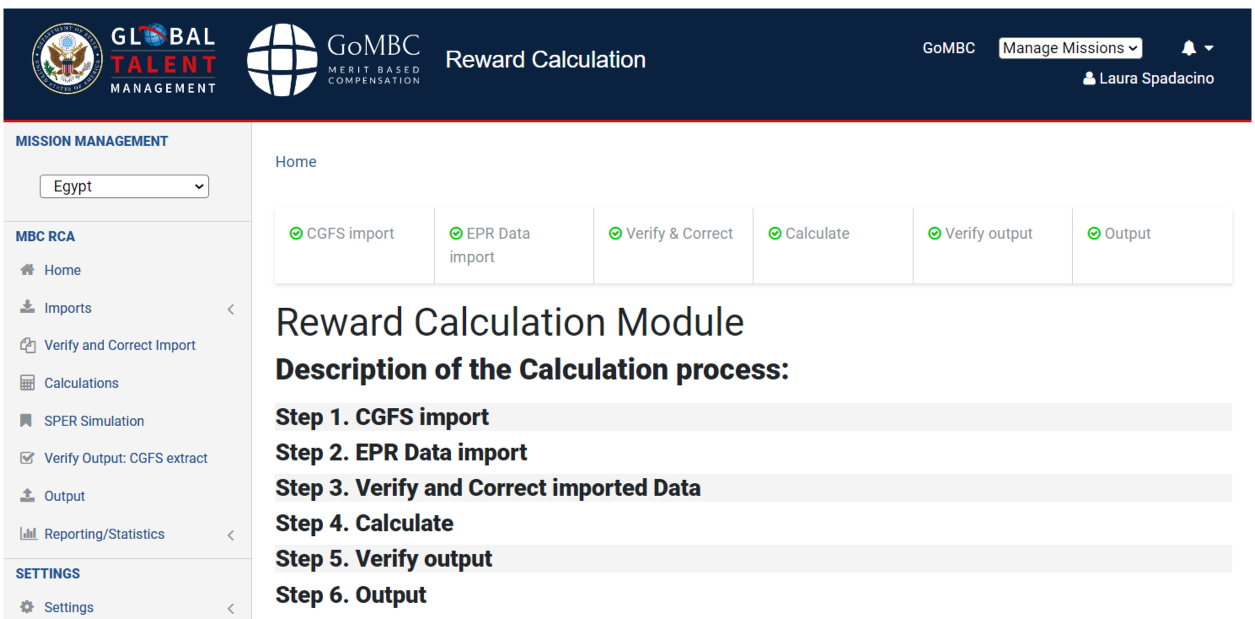
This role allows FMOs at post to download summary reports of MBC calculation.

Reward Calculation Reporting HR

This role allows HROs at post to download statistics on performance ratings.

Getting Around

RCA has its own navigation system, independent of the GoMBC performance document management component. At the top of the screen, you'll find the dropdown to select between **Manage Missions** and **Manage Pools** depending on your role(s).



Any **notifications** for you are shown here too. Hit the **notification icon** () to read them.

- To return to GoMBC, select the **GoMBC** link at the top of the screen.

SIDE MENUS

Down the side of the screen are controls used to complete the MBC calculation and manage RCA administration.

MISSION MANAGEMENT

This shows the mission currently selected. If you support more than one mission, use the dropdown to switch locations.

MBC RCA

The RCA menu shows the steps needed to complete MBC reward calculation.

Imports covers the steps to import employee **Time & Attendance** information and retrieve **Total Performance Scores** from CGFS and GoMBC.

Verify and Correct Import is where you will match up both data set and identify and clear discrepancies.

Calculations is where RCA performs reward calculations for each employee.

Verify Output: CFGS Extract is where **Pool Supervisors** and management staff review and approve calculations.

Output is the final step, where data is exported to OPS and employee letters are created for distribution.

Reporting/Statistics is where you find the **Audit Log** of activity in RCA and **Statistics Reports** for HR staff.

- The calculation steps must be completed in sequence.

SETTINGS

This menu is only available to the **Reward Calculation Mission Admin** role.

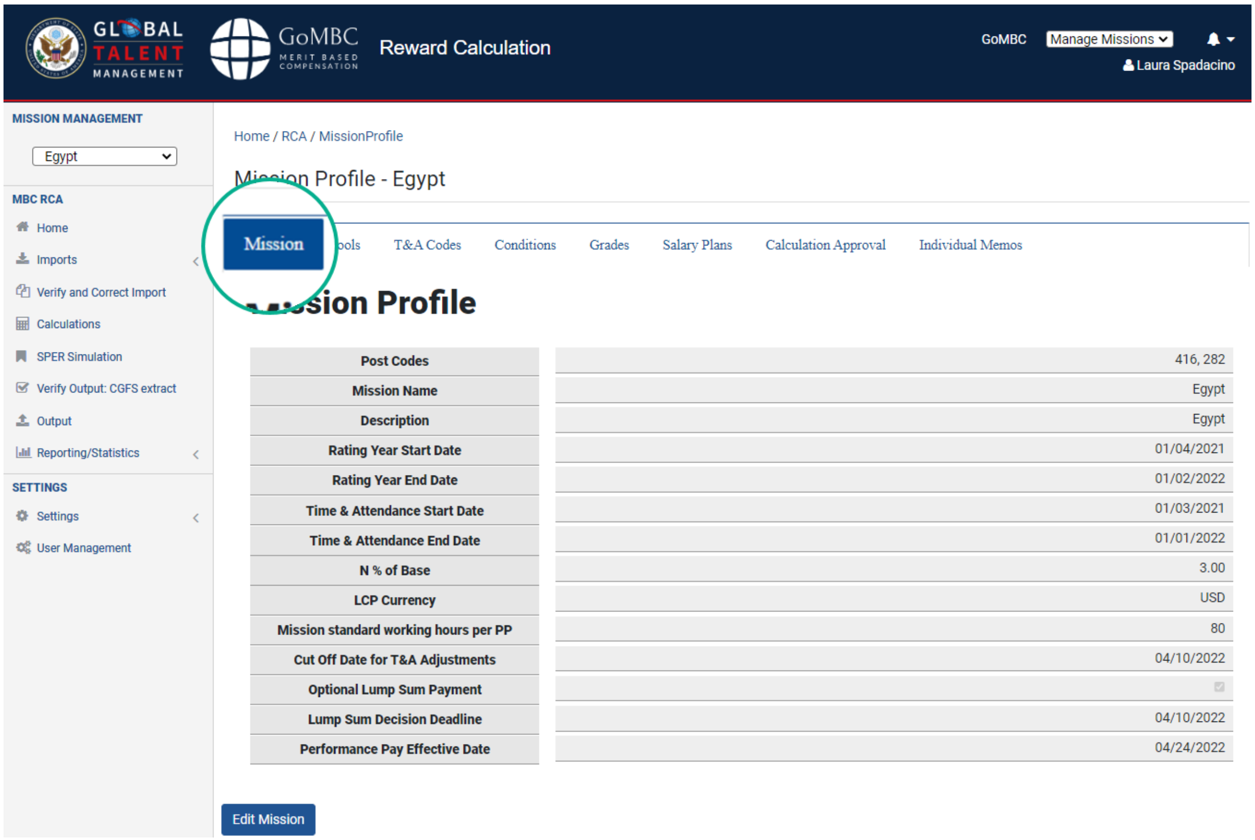
Mission Profile is where you set up things like calculation **Conditions**, **Salary Plans**, and **Individual Memo** templates for employee letters. It's also the place to assign Tier 1, Tier 2, and Tier 3 approvers to review calculations.

Template Field Settings controls the mapping of data from external services to the fields used in RCA. These values should not be edited.

Posts of this Mission is where you fill out details for each constituent post in your mission.

Managing Mission Settings

- Only available to the GoMBC Reward Calculation Mission Admin.



Use the tabs to navigate between sections of the mission profile.

Here's where to administer the details of your selected mission.

Mission Profile includes a guided process to set up things like calculation **Conditions**, **Salary Plans**, and **Individual Memo** templates for employee letters. It's also the place to assign approvers to review calculations.

Template Field Settings controls the mapping of data from external services to the fields used in RCA. These values should not be edited.

Posts of this Mission is where to fill out details for each constituent post in your mission.

Mission Profile

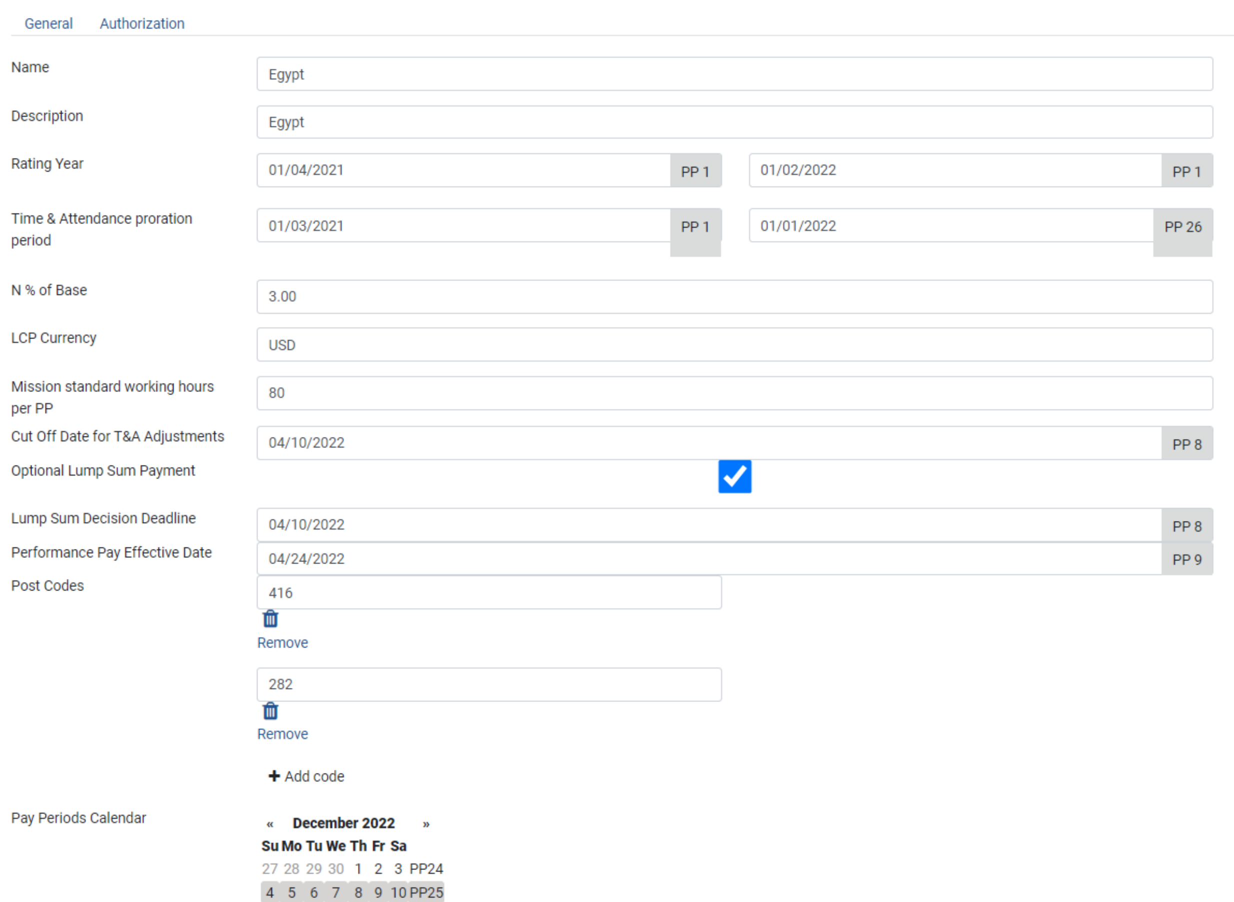
This is the place to update the details of your mission and view people assigned to approve calculations for each **Performance Pool**.

From the **Settings** menu, expand Settings to select Mission Profile. This brings up the current details for your mission and tab navigation to move you between **Mission** profile and performance **Pools**, **Time & Attendance (T&A) Codes**, **Conditions** applying to certain codes, the mission's **Grades** and **Salary Plans**, people assigned to **Calculation Approval**, and template documents for the **Individual Memos** sent to employees.

Let's work through each tab in turn.

MISSION

Choose Edit Mission to update details of your chosen location.



Edit the mission's details then save your changes.

Name is the name of the Mission.

Description describes the Mission.

Rating Year includes the start date and end date of the performance period. This should correspond to your Performance Period defined in GoMBC. Use the calendar picker to select each date.

Time & Attendance proration period includes the start and end date for the T&A and corresponds to the start and end date of the MBC report received from CGFS. The start date should be at the beginning of a pay period and the end date at the end of a pay period.

N% of Base is the percentage of base salary allocated to MBC rewards. The standard value is 3%.

LCP Currency is the financial currency unit used in the mission's location.

Mission Standard Working Hours per PP states the weekly working hours typically expected of each person in the mission.

Cut Off Date for T&A Adjustments is the deadline for locking in changes to time & attendance figures for the selected performance period.

- Your post's timekeepers can help make sure any T&A adjustments are made before the end of the end of the rating cycle.

Optional Lump Sum Payment should be selected only if your location is authorized to issue MBC rewards as lump sum payment to employees not at the top of their grade's salary band.

Lump Sum Decision Deadline is the final date for eligible employees to return their MBC reward decision memos with their choice of a lump sum payment.

Performance Pay Effective Date is the pay period when MBC rewards to be distributed.

Post Code is the unique identifying code for a post. Select Add Code to enter additional codes for posts in the mission or Remove to clear them.

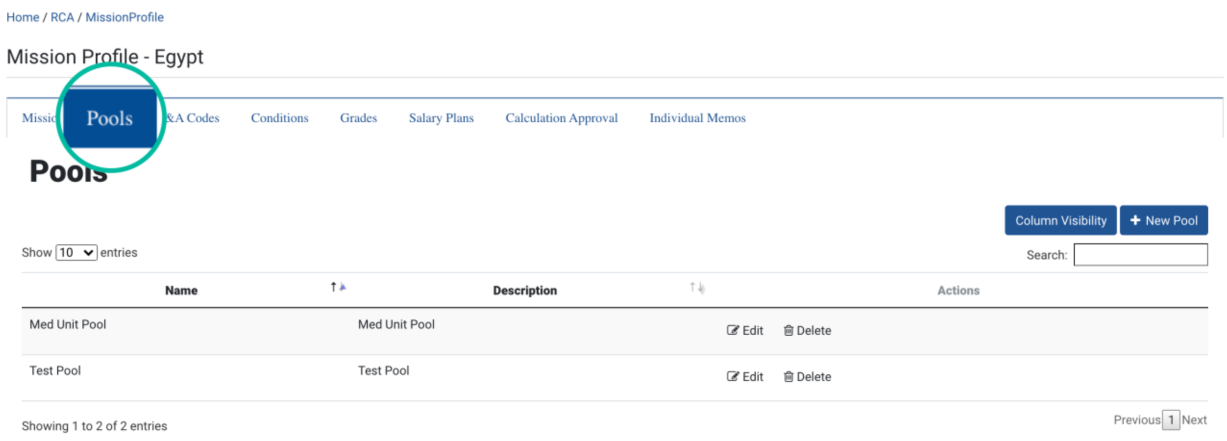
Pay Periods Calendar shows the government pay schedule. This calendar is included for your reference as you define dates.

Be sure to Save any changes you make or select Back to Mission Profile to stop editing.

As the **Reward Calculation Mission Admin,** you're also able to Delete the mission profile, ready to start over.

POOLS

Select this tab for a list of the performance pools created for your location, showing each pool's **Name** and **Description**. Actions to take here are to Edit these details or Delete the pool.



Select **Edit** to update a pool or **New Pool** to create one.

The list of pools (and their supervisors) is imported from GoMBC. To make sure you have the latest pools, go to the GoMBC **Organization Admin** menu. Under **Manage Employees** select Sync Employees.

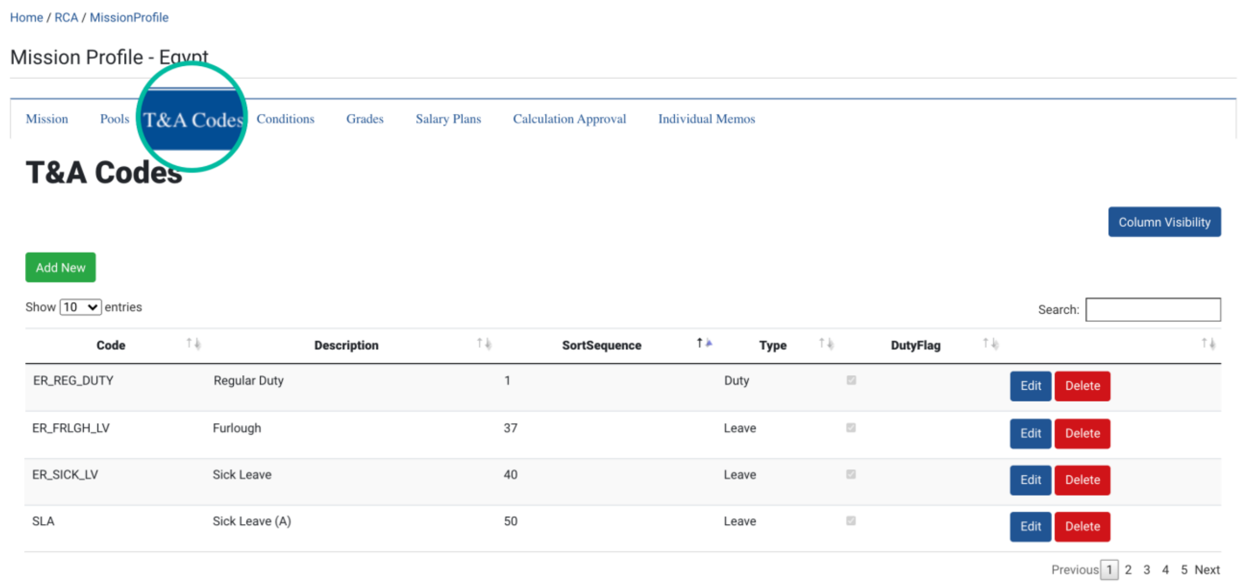
To create a new pool, select New Pool and you'll be asked to give it a **Name** and **Description**. Pools you create in RCA are not transferred back to GoMBC, so it is recommended that they are added in GoMBC.

- Pools of 3 or fewer employees may be subject to the **Small Pool Exception Rule (SPER)**. This adjusts each MBC reward to bring it into line with those of larger pools.

TIME & ATTENDANCE CODES

Select this tab for a list of the **Time & Attendance (T&A)** codes used to cover periods of duty, leaves of absence, or additional payments in your location. These codes are defined by the **Bureau of the Comptroller and Global Financial Services (CGFS)** and supplied to each mission.

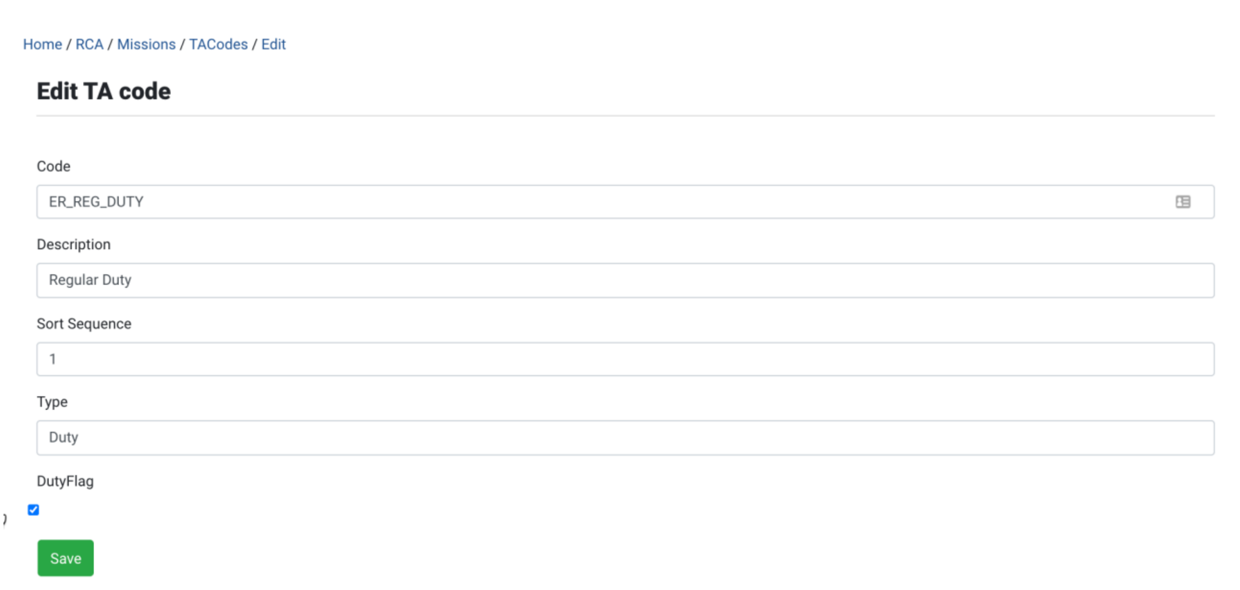
You will use the T&A codes defined here to apply **Conditions** to MBC reward calculations for your location.



Select **Edit** to update a T&A code or **Add New** to create one.

The list shows each **Code**, its **Description**, the **Sort Sequence** that RCA uses during calculation, and a **Duty Flag** to denote whether the code is considered **duty** or **non-duty** for calculation purposes.

Actions to take here are to Edit these details or Delete the code to remove it from use in your selected mission. Or select Add New to create a new T&A code directly in RCA.

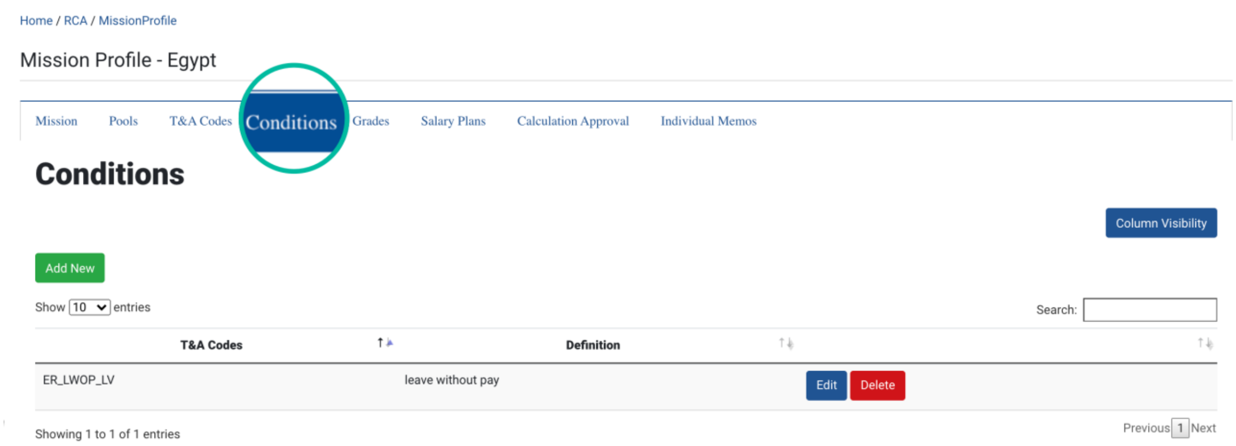


Edit the code's details including whether the code applies to duty or non-duty periods.

CONDITIONS

Select this tab to apply calculation conditions to specific T&A codes based on your **Local Compensation Plan**. You can use these conditions to **prorate** MBC rewards based on time allocated or TPS score achieved.

A condition includes one or more **rules** to reflect your location's application of a code, based on working **hours** or **days**, **calendar days**, or **pay periods**.

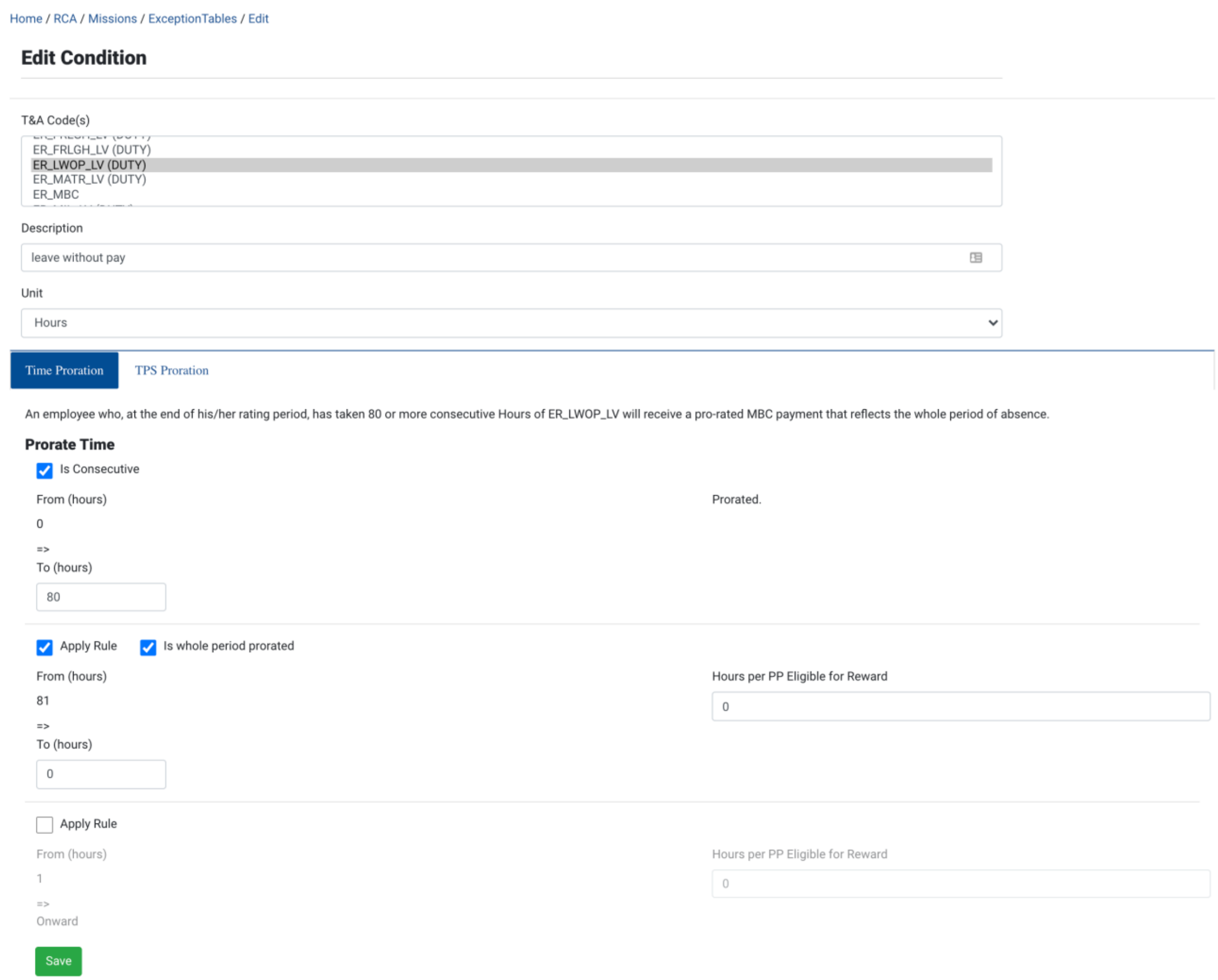


Select **Edit** to update a condition or **Add New** to create one.

The list shows each condition, showing its **Definition** and the **T&A codes** it affects. Actions to take here are to **Edit** the condition or **Delete** it.

Applying Conditions

Select **Edit** to change an existing condition or **Add New** to create one. This brings up the editing screen to set the condition's rules.



Select codes to apply the condition to before prorating time or TPS.

Start by selecting one or more **T&A codes** for the condition to apply to. Hold down **CTRL** on your keyboard to select individual codes.

Add a **Description** for the condition and choose the unit of time (either **Hours**, **Pay Periods**, **Calendar Days**, or **Work Days**) used in calculation.

Now you need to decide whether the condition should apply **Time Proration** or **TPS Proration**.

PRORATING TIME

Select **Time Proration** to set out how time allocated to the selected T&A code should be considered during reward calculation. Time proration will prorate both the budget and the aTPS. In general, and unless otherwise specified by local labor law, if local labor law defines a condition on a specific type of unpaid leave, time proration should be used.

For example, an employee who has taken more than 80 hours of leave without pay may receive a prorated MBC reward reflecting their **whole period of absence**. In another scenario, an employee on long-term sick leave may have their MBC reward prorated based only on leave **exceeding** 240 hours.

Under **Prorate Time** enter the number of hours (or your selected time unit) to apply the condition to. By default, this refers to **cumulative** time, but if you want the condition to apply to **consecutive** time, select **Is Consecutive**.

To create a **condition**, first select **Apply Rule** to define the condition. If all the employee's time is subject to variable proration, select **Is Whole Period Prorated**.

Next, Enter the period the condition should apply to, and the time period (per employee) considered eligible for an MBC reward. You can also extend the condition to cover time beyond this period.

PRORATING TPS

You can also set rules to prorate employee **Total Performance Scores (TPS)** based on time allocated to the selected T&A code. For example, your Mission may have a policy to allocate 100 TPS to employees on maternity leave. TPS proration will only prorate the aTPS, the full budget for the employee will be contributed to the pool.

Select **TPS Proration** to add rules to your condition. Under **Fixed TPS** enter the number of hours (or your selected time unit) to apply a rule to. By default, this refers to **cumulative** time, but if you want the condition to apply to **consecutive** time, select **Is Consecutive**.

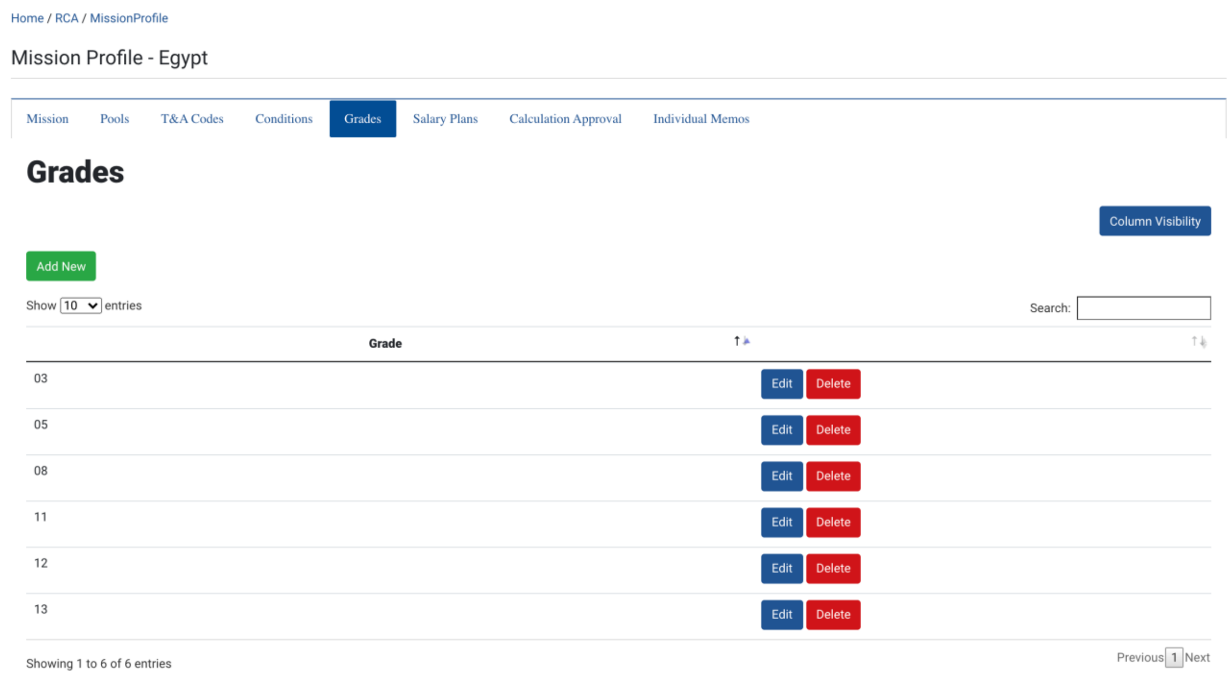
To create a **condition**, first select **Apply Rule** to define the condition. If all the employee's time is subject to variable proration, select **Is Whole Period Prorated**.

Next, the period the condition should apply to, and the points the **TPS** should be reduced to. You can also extend the condition to cover time beyond this period.

Be sure to **Save** your condition when you're done.

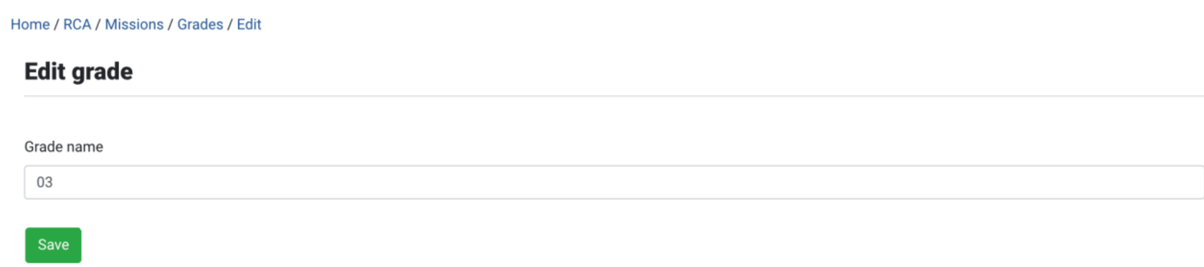
GRADES

Select this tab to customize the grade levels that LE staff can hold in your selected mission.



Select **Edit** to update a grade or **Add New** to create one.

The list shows any grades created previously. Actions to take here are to **Edit** the grade or **Delete** it. Use **Add New** to set up a new grade level. Make sure the name you give the grade matches the record in CFGS (such as 06 or 07, not FSN-6 or FSN-7).



Give the grade a name that matches its record in CGFS.

- Grades you create in RCA are not transferred back to GoMBC.

Select this tab to customize the pay scales that apply to grade levels in your selected mission. These plans are used to calculate MBC rewards.

Select **Edit** to update a plan or **Add New** to create one.

The list shows any existing salary plans by **Name**. Actions to take here are to Edit the plan or Delete it.

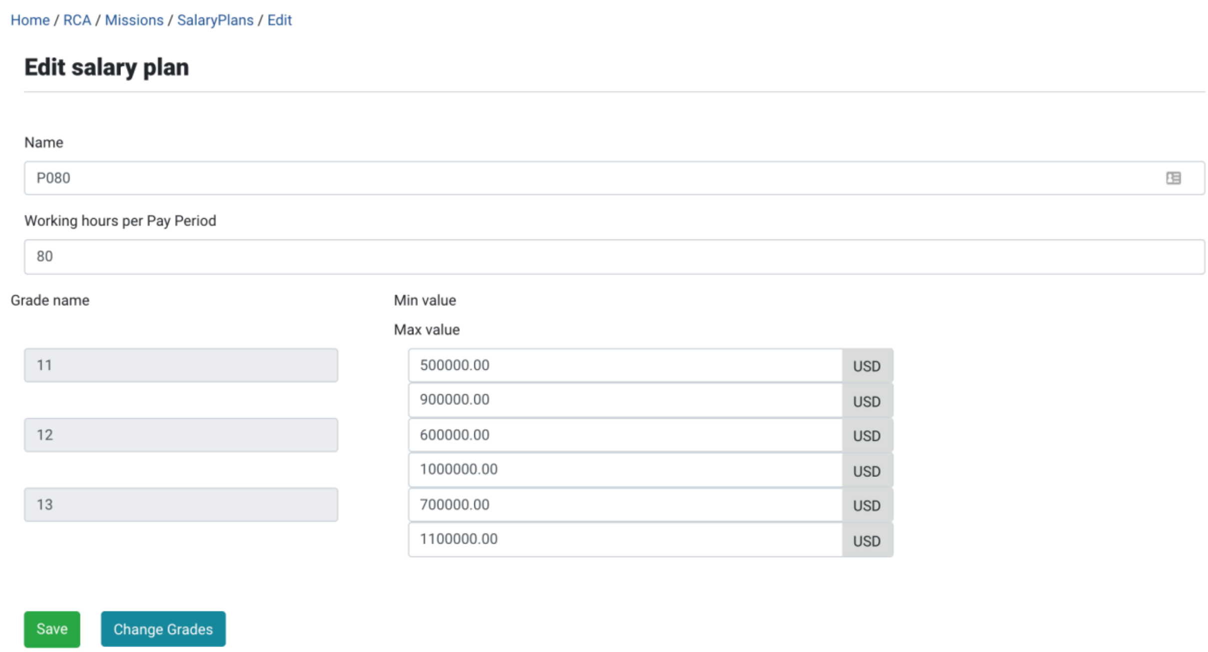
Updating a Salary Plan

Select Add New to set up a new plan (or Edit to change an existing one).

When adding a new plan, you will first need to give the plan a **Name** and select the **Grades** the plan should cover. Hold down CTRL on your keyboard to select multiple grades. Select Set Grades when you're done.

Now type in the **Working Hours per Pay Period** the plan should cover for your location (the standard is 80 hours per period, equating to 40 hours per week).

For each grade, enter the minimum and maximum amounts (in local currency) of the salary band.



Enter the minimum and maximum amounts for each grade's salary band.

To edit the grades covered by the plan, select **Change Grades**. Or if everything looks good, go ahead and **Save** your plan.

CALCULATION APPROVAL

Select this tab to view those assigned to review and approve calculations. The RCA approval flow comprises 3 tiers that must be completed in sequence.

Select **Change** to update an approver or **Set** to assign one.

Tier 1 is where **Pool Supervisors** approve calculation reports for their assigned pools.

Tier 2 is for the **HRO** or **Management Officer** to approve all final MBC reward calculations for their mission.

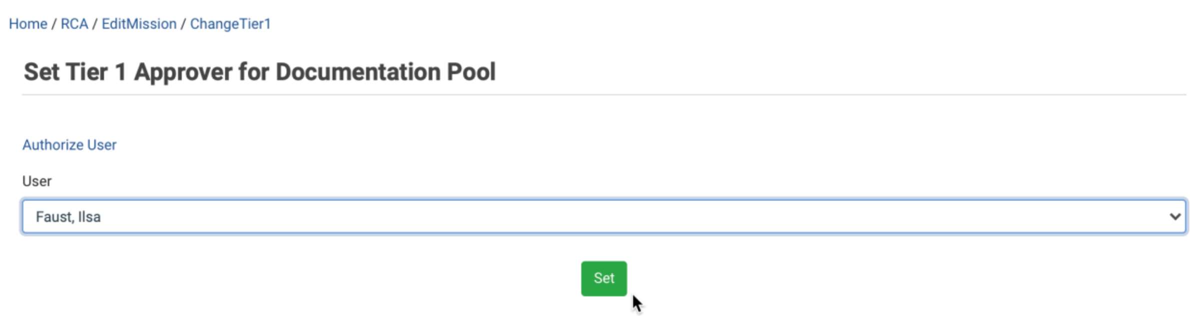
Tier 3 is final approval from the **Deputy Chief of Mission (DCM)** or other appointed person before calculations are sent to payroll.

The list shows the people assigned to each approval role and any spots you still need to fill. Select **Set** to add an approver to an empty slot or **Change** to give it to someone else.

Setting or Changing Approvers

It is recommended that roles are assigned in GoMBC and synced to RCA by selecting **Sync Employees** from the **Manage Employees** screen. Tier 1 approvers in RCA will be set to the pool supervisors in GoMBC and when changes are synced in GoMBC, they will be updated in RCA right away. Tier 2 and 3 approvers in RCA should be given the Reward Calculation Approver role in GoMBC.

If changes are needed in RCA, select **Set** or **Change** to bring up a dropdown of people able to approve within the selected tier. Pick the name you want and select **Set** to assign them.

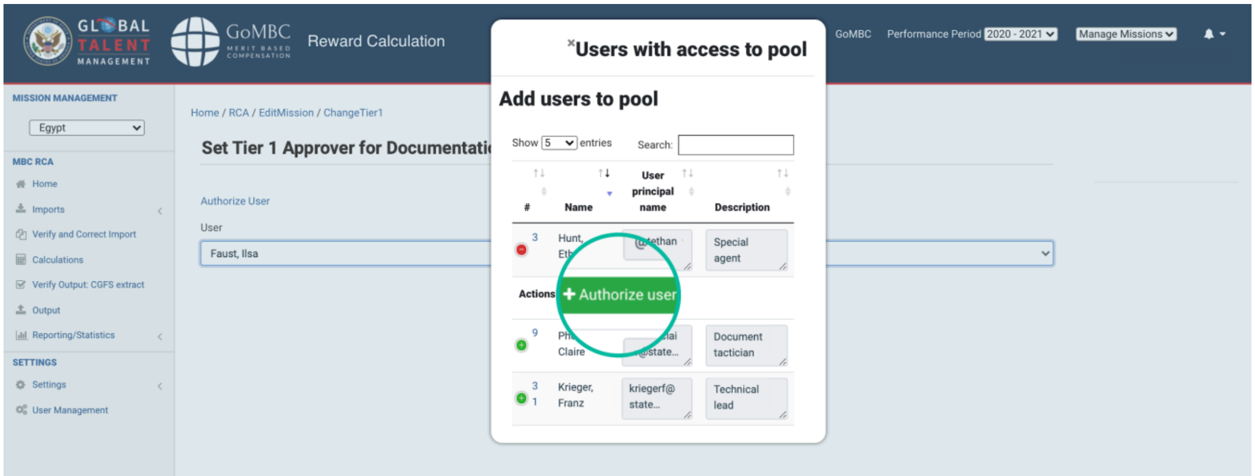


Set a user from the list or select **Authorize User** to add someone else.

If the person you're looking for isn't included in the dropdown, you will first need to **authorize** their access. Select **Authorize User** to bring up the **Users With Access to Pool** window.

Find the person you need from the list of RCA users (or use **Search**). Expand their entry to select **Authorize User**.

- If the approver has approved the calculations for the given tier, you will not be able to change the approver.



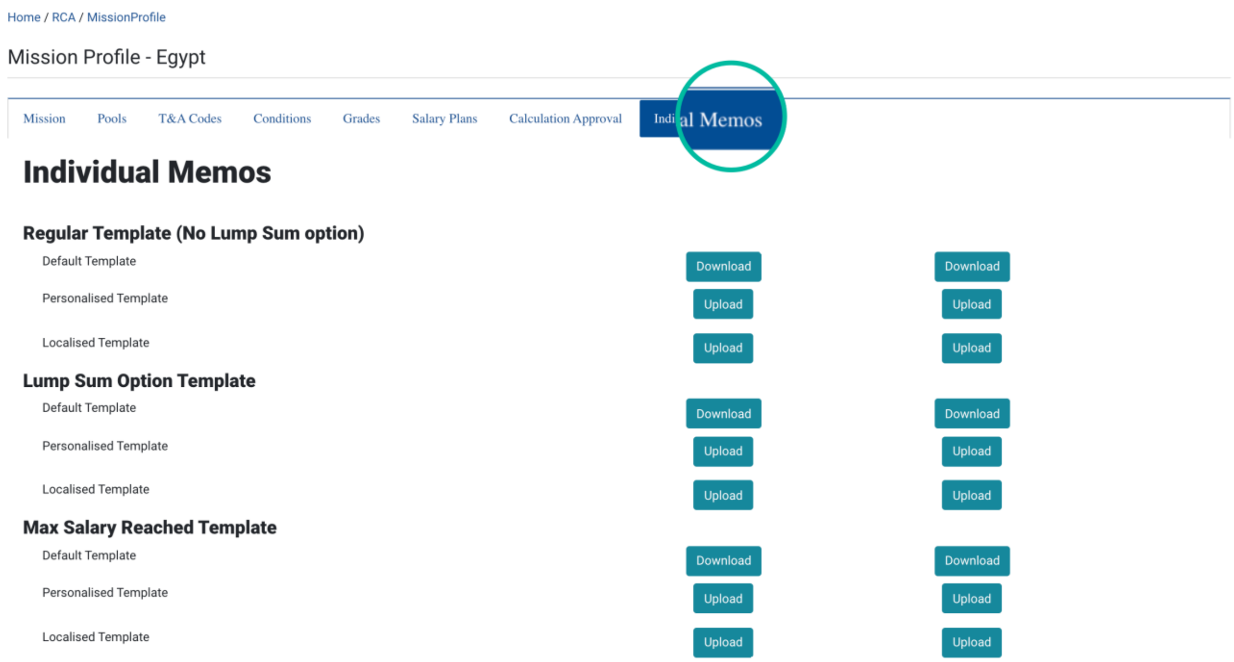
Expand the user's entry then select **Authorize User** to assign roles.

You will now see the RCA **roles** this person has already or can be assigned. Select the roles you want to assign. For example, Pool Supervisors each need the **Pool Approver** role to complete their approvals. Hit **Authorize** to grant your selected roles.

- Check the list of approvers toward the end of each rating cycle to replace people who have left post and don't forget to sync from GoMBC!

INDIVIDUAL MEMOS

Select this tab to manage templates used to create personalized MBC reward letters for each employee. There are 3 main template types used in RCA.



Select **Download** for a copy of a template or **Upload** a custom version.

Regular is for employees who will receive the MBC reward as an increase to their base salary.

Lump Sum Option (where available) is for employees who choose to receive all of their MBC reward as a lump sum payment.

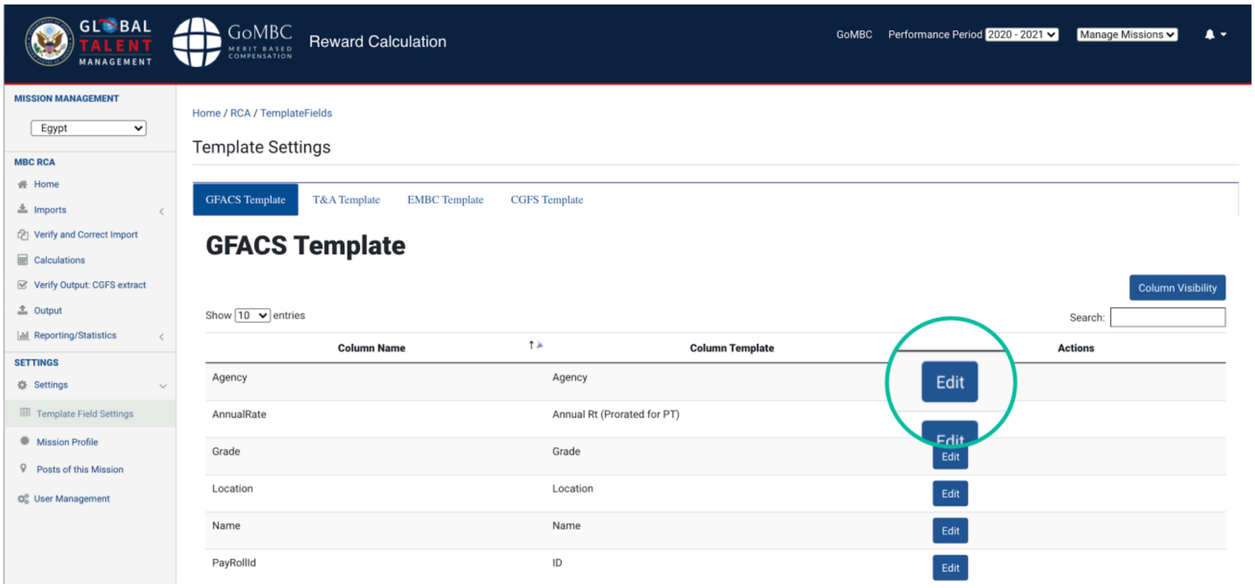
Max Salary Reached is for employees near or at the maximum salary for their grade. If they're already at the maximum, they will receive their reward as a lump sum payment. Otherwise, they receive some of the MBC reward as a base salary increase (up to the maximum for their grade band) and the balance as a lump sum payment.

Download the **Default Template** for each type as a Microsoft Word (.docx) file. You can edit this file to personalize the wording for your mission or localize to another language before selecting Upload to add your **Personalized Template** or **Localized Template**.

- Don't change the formatting codes (in capital letters) when customizing a template. These are used to fill out details specific to each employee.

Template Field Settings

This is where you can customize how data fields from external services are mapped to fields in RCA. Don't change things here unless requested by the RCA support team. There are 4 templates to review.

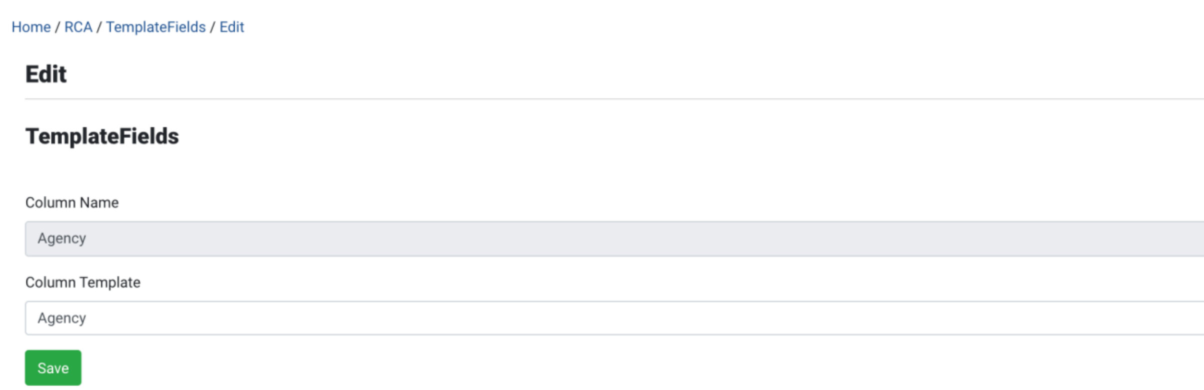


Select **Edit** to update a field mapping.

MANAGING TEMPLATES

In each case, **Column Name** shows each field title as it appears in RCA. **Column Template** lists the corresponding field title from the external system.

Select **Edit** to update the external field name mapped to your chosen RCA field. Then **Save** your edit once you're done.



Map the RCA Column Name to the Column Template from the external system.

GFACS

The **Global Foreign Affairs Compensation System (GFACS)** handles employee payroll and annuity pay processing worldwide. The **Overseas Personnel System (OPS)** sends updated salary information from RCA to GFACS once calculations are fully approved.

T&A

Time & Attendance (T&A) codes are sourced from CGFS. This template maps only the fields used in applying these codes, including its **Name**, **Description**, and **Hours** allocated to the code.

GoMBC

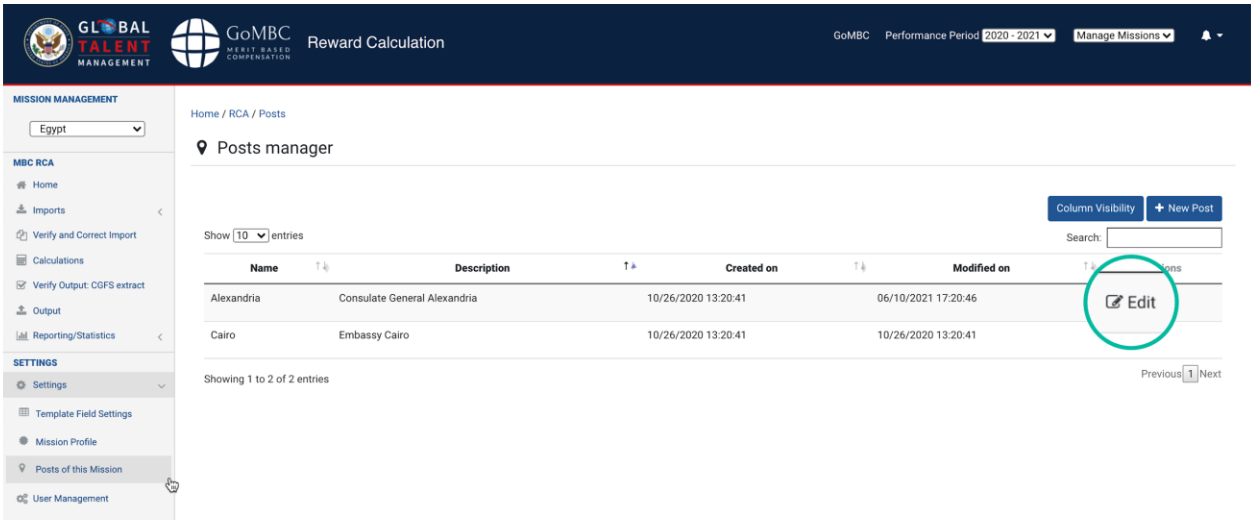
GoMBC is the application that allows posts and missions to electronically process performance documents for LE staff. You will import **Total Performance Scores (TPS)** from GoMBC at the end of each review cycle.

CGFS

The **Bureau of the Comptroller and Global Financial Services (CGFS)** looks after worldwide financial management operations, systems, and services. This template maps the fields used to identify an employee, including their **Agency**, **Hire Date**, and **Annual (Salary) Rate**.

Posts of this Mission

Use this area to define the posts contained within your currently selected mission. The list shows any existing posts, including their **Name**, **Description** and when they were **Created** or **Modified**.



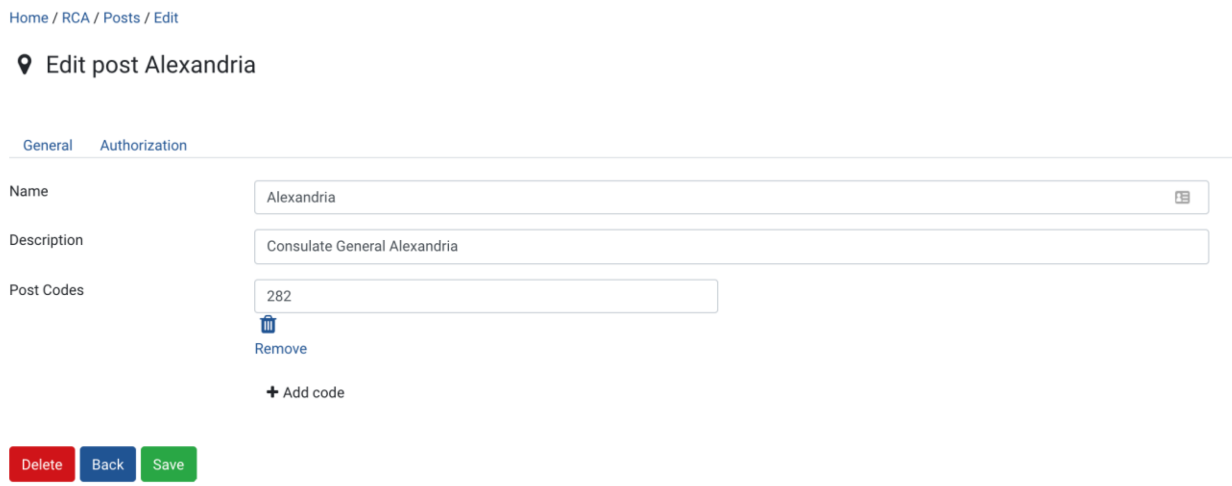
Select **Edit** to update a post or **New Post** to create one.

ADDING OR EDITING A POST

Use the **Edit** action to update an existing post or create a **New Post** for the mission. Now enter a name and description for the post and add the correct **Post Code**.

Each post will have one or more unique identifying codes. Select **Add Code** to enter each additional code. **Save** your changes once you're done.

You can also **Delete** a post here if it's no longer in use.



Edit the post's details including its unique post code.

Calculating the MBC Reward

The MBC program for participating LE staff works by pooling a fixed percentage of basic salaries into an **MBC budget**. A portion of the budget is then redistributed to each staff member in the pool based on their **adjusted Total Performance Score (aTPS)** and any **proration** conditions.

The total budget for a performance pool is divided by the sum of all aTPS in that pool, resulting in the **value per point**. This figure is multiplied by each individual's aTPS to calculate their reward.

However, certain **conditions** (such as extended leave or restricted hours) may affect the employee's contribution to the pool and/or TPS. These conditions are applied using employee **Time & Attendance (T&A)** information supplied by CGFS before rewards are calculated.

When calculations are complete, they are approved by each **Pool Supervisor**, **HR**, and the **Deputy Chief of Mission (DCM)** before disbursement to employees.

Using RCA to Calculate Rewards

With RCA you'll follow a 6-step structured process to import data, run calculations, verify and approve the results, and generate reward letters.

The **progress tracker** shown above each step will help you know where you are in the process. Each step must be completed before moving on to the next.

Step 1: Import CGFS Template

This is where you import T&A information from CGFS for each employee in your mission. You will need the **CGFS MBC Report** for the period of the rating cycle. You can get this file from your payroll technician or download it from SHIFTS.

Step 2: Import / Enter TPS

Here's where you import employee **Total Performance Scores (TPS)** directly from the GoMBC performance component.

Step 3: Verify and Correct Import

This is where data from the two imports are matched together.

Step 4: Calculations

Here's where RCA performs MBC reward calculations. You will see a detailed breakdown of the calculation and provide input where needed.

STEP 5: VERIFY OUTPUT: CGFS

This is where you assign people to the 3 tiers of calculation approval. These people must hold the appropriate role to complete their approval, assigned from the **Calculation Approval** tab found under **Mission Profile**.

STEP 6: OUTPUT

Here's where you find the personalized letters stating each employee's MBC reward. These are based on templates (configured from the **Individual Memos** tab found under **Mission Profile**). RCA doesn't distribute these letters, but they're available for you to download and share.

OTHER INFORMATION TO PREPARE

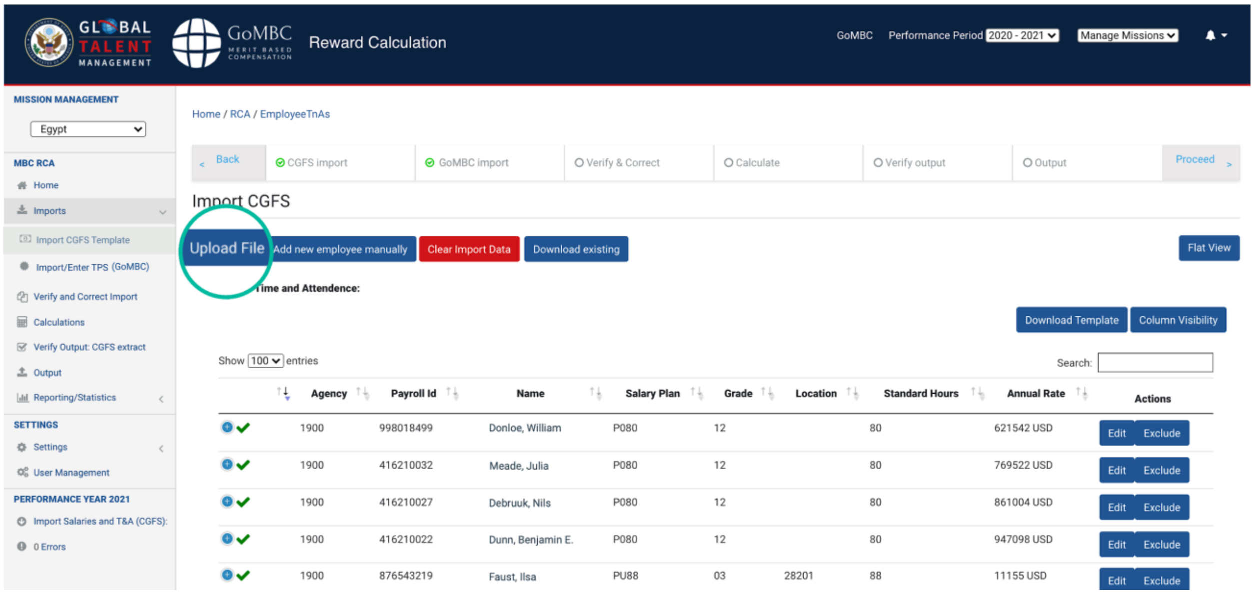
To complete calculations smoothly, you may need additional information to refer to.

- A complete list of the **T&A codes** used in your location.
- The **Pay Calendar** for both years covered by your selected rating cycle.
- **Pay Plans** and **Salaries** in effect during your selected rating cycle.
- Names of **Pool Supervisors** and **HROs** appointed to approve calculations. Pool Supervisors are imported from GoMBC but can be changed in RCA.
- Whether the **Small Pool Exception Rule (SPER)** applies to your location. You can find this in your **Performance Management Policy for MBC** document.

Import CGFS Template

- Only available to the GoMBC Reward Calculation Mission Admin.

The first step in the calculation process is to import the **CGFS MBC Report** using the spreadsheet you received from **SHIFTS** or your payroll technician.



UPLOADING DATA

Before uploading data, verify that the Mission Profile contains the correct T&A start and end dates that correspond to the relevant pay periods within the CGFS report. See the **Mission Profile** section for more information.

From the RCA menu, expand **Imports** to select **Import CGFS Template**. This brings up the **Import CGFS** page, showing several options.

Upload File prompts you to locate the CGFS file on your computer and add it to RCA.

Add New Employee Manually lets you create an employee record directly in RCA.

Clear Import Data removes any data previously imported so you can start the process again.

Go ahead and select the **Upload File** to import the CGFS document.

- You can also start the import from the RCA home page by selecting **Start Import**.

REVIEWING DATA

Once complete, you will see a list of employees showing data including their **Name**, **Salary Plan**, and **Standard Hours**. The **Actions** to take here are to **Edit** an imported employee record or **Exclude** them from calculation.

Expand any entry to see a list of **Pay Periods** and **Hours** covering the performance period. From here you can **Add T&A Code** to a specific pay period or **Exclude** the period from calculation. You can further expand entries in this list to see any T&A Code already applied and (if necessary) **Exclude** it from calculation.

- Switch to **Flat View** for a simple list of imported employees. Select **Column Visibility** to customize the content of the list.

VERIFYING IMPORTED DATA

RCA checks each imported employee record against the mission profile. If an entry doesn't fit with the profile (such as a salary range falling outside the mission's salary plans) or has data missing, it gets marked as containing one or more **errors**.

Expand any entry marked as an error for details of what needs to be adjusted. You can now **Edit** the entry to update information or else **Exclude** the employee from the calculation.

In some cases, you can also tell RCA that data is actually correct. For example, employees in **saved rate** status may have a base salary outside the ranges of the mission's salary plans. To acknowledge that their salary is valid, select **Valid Rate**.

- Beneath the RCA menu you will see a count of the **successful** records imported, the **errors** reported, and the employees you **excluded** from calculation.

FINALIZING IMPORTED DATA

Once your list of employees is error-free, you will see the option to **Proceed** to the next calculation step. You can also get a copy of your updated records by selecting **Download Existing**.

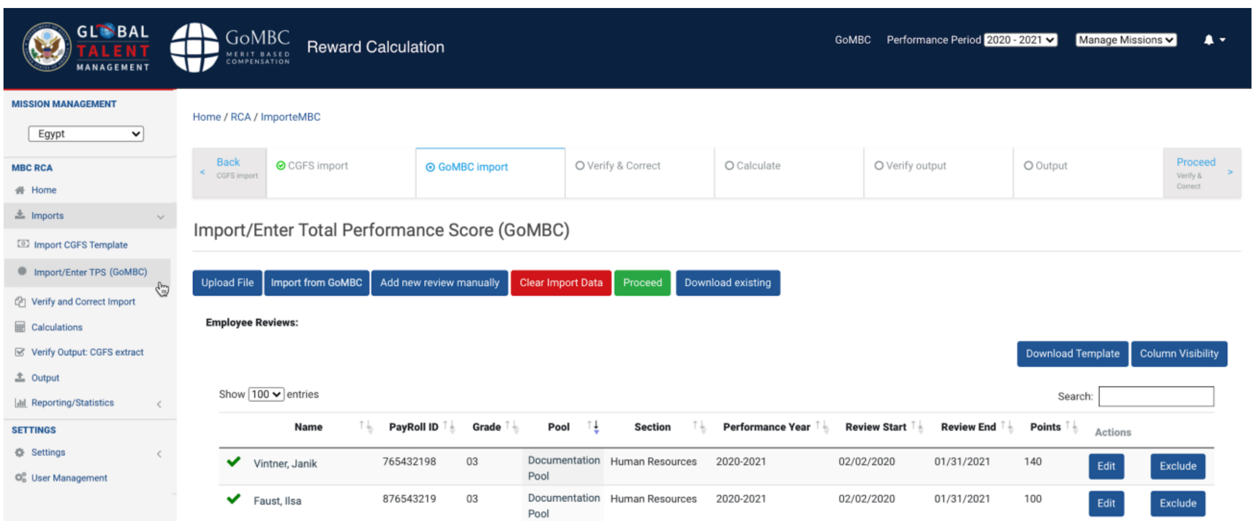
Import / Enter TPS

- Only available to the GoMBC Reward Calculation Mission Admin.

In the second step in the calculation process you will import detailed performance management information, including but not limited to employee name, performance period, **Total Performance Scores (TPS)**, performance pool and report status from GoMBC.

Before importing or uploading data, you should verify the **Rating Year Start** and **End Date** in the Mission Profile. These dates should match you're the Performance Period dates in GoMBC and do not need to be tied to pay periods. View the **Mission Profile** section for more details.

The progress tracker should show **GoMBC Import.** If not, from the RCA menu, expand Imports to select Import / Enter TPS (GoMBC). This brings up the **Import / Enter Total Performance Score (GoMBC)** page, showing several options.



Upload File prompts you to import using a spreadsheet file on your computer as an alternative to using GoMBC import.

Import from GoMBC brings in TPS scores automatically for eligible employees who completed a performance review using GoMBC. Reviews must be finalized or in the appeal process.

Add New Review Manually is how you enter an employee's TPS score directly into RCA.

Clear Import Data removes any TPS data previously imported so you can start this step again.

Select Import from GoMBC to get finalized TPS scores into RCA. You should now see a list of employees showing data including their **Name**, **Review Start** and **End** dates, and their **Points (TPS)**. The **Actions** to take here are to Edit an imported employee record or Exclude them from calculation.

- If you excluded an employee during the previous step, you should exclude them here too.

IMPORTING FROM A MANUAL SPREADSHEET

As an alternative to importing EPR data, you can upload an Excel file to RCA. Make sure the column names are correctly formatted and ordered. The GoMBC General Review Report can be used for this file upload, simply export the file in GoMBC and add it to RCA without making any file changes. Fields required in the spreadsheet are listed below:

1. **Name** is the employee's full name.
2. **Section** is the area they work in.
3. **Review Period** is the performance year their rating applies to.
4. **Points** is the employee’s TPS.
5. **Pool** is the performance pool they are placed in.
6. **Payroll ID** is their employee identification number
7. **Grade** is the grade level the employee holds in a post or mission.
7. **Start Date** marks the start of the period covered by their Employee Performance Report (EPR).
8. **End Date** marks the end of the period covered by their Employee Performance Report (EPR).

With the spreadsheet set up, fill out these details for each employee eligible for an MBC reward in your selected performance period. Save the completed spreadsheet as a **.xlsx** or **.csv** file, then in RCA select **Upload File** to import.

- Each **Interim** report for an employee must have a separate line entry.

ADDING NEW REVIEWS MANUALLY

Select **Add New Review Manually** to record a TPS score for an LE staff member. Changes you make here will not be added to GoMBC. You will need to select the employee's **Payroll ID** and performance **Pool**, then enter their **Section**, the **Start** and **End** dates of their review period, and finally their **Points** (TPS score). Then select **Create** to add the review for calculation.

NEXT STEPS

If any errors exist (for example an employee has two reviews with overlapping dates), they must be reviewed and corrected before you can proceed.

Once all TPSs are in and errors cleared, you will see the option to **Proceed** to the next calculation step.

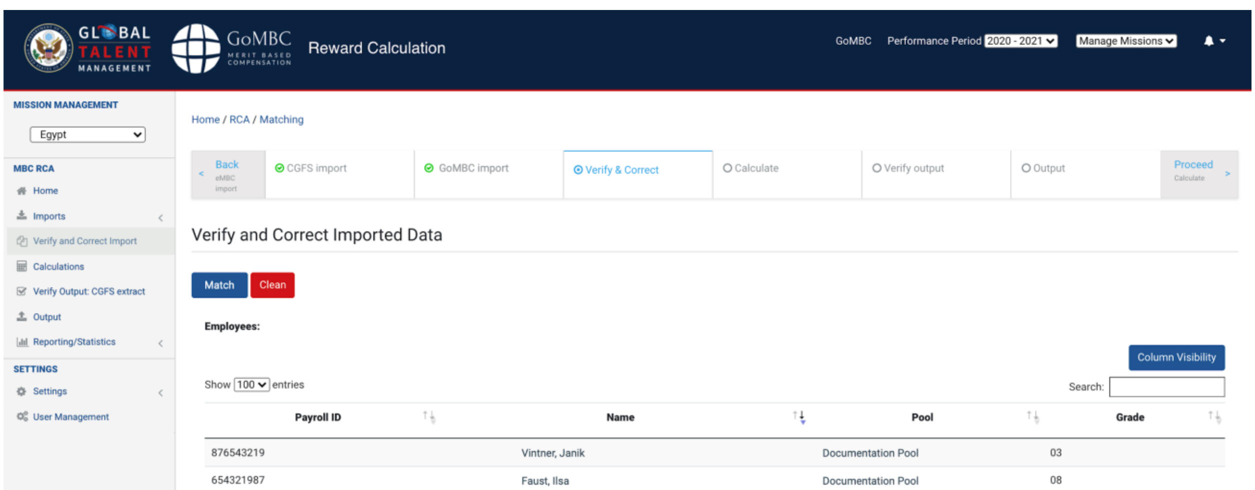
- Beneath the RCA menu you will see a count of the **successful** records imported, the **errors** reported, and the employees you **excluded** from calculation.

Verify and Correct Import

- Only available to the GoMBC Reward Calculation Mission Admin.

In the third step of the calculation process you will match the employee data imported from CGFS to the TPSs imported from GoMBC.

The progress tracker should show **Verify & Correct**. Or from the RCA menu, select **Verify and Correct Import**. You should now have options to **Match** and **Clean** the data sources.



Select **Match** to associate the CGFS data to the imported TPSs. Any records that don't match will be marked as containing one or more **errors**. **Edit** or **Exclude** these entries to clear the errors.

When all the errors are cleared, you will see the option to **Proceed** to the next step.

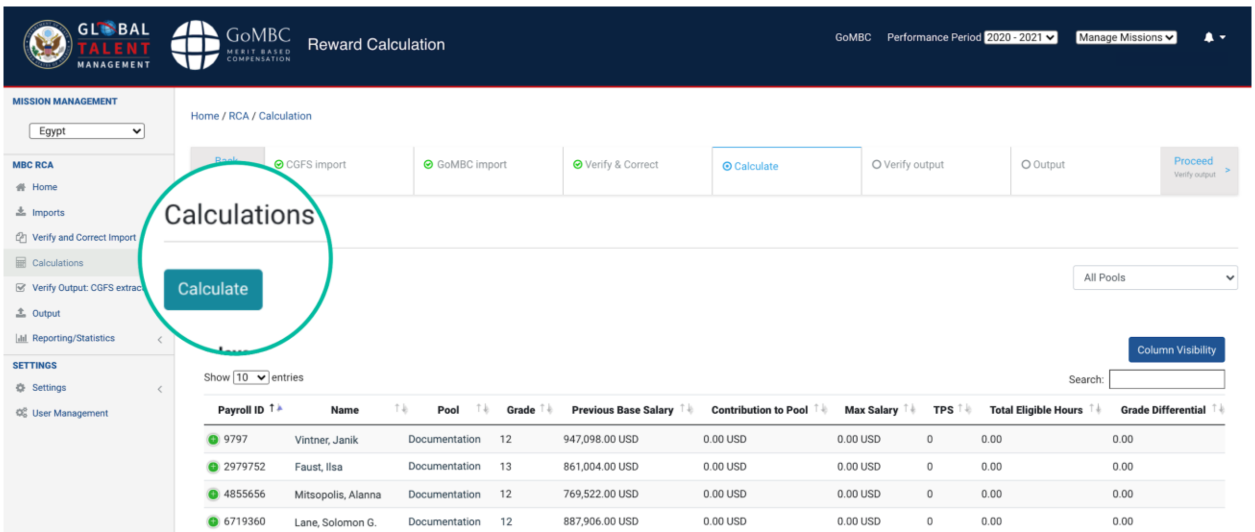
- Beneath the RCA menu you will see a count of the **successful** records imported, the **errors** reported, and the employees you **excluded** from calculation.

CALCULATIONS

- Only available to the GoMBC Reward Calculation Mission Admin.

In the fourth step of the calculation process you will calculate each employee's MBC reward.

The progress tracker should show **Calculate**. Or from the RCA menu, select Calculations. Select Calculate for RCA to run an initial calculation.



Results will appear for all included employees in your assigned pools. Use the dropdown to switch between **All Pools** and individual pools or use **Search** to find a specific employee or pool.

REVIEWING CALCULATIONS

Expand each result to reveal an overview of the calculation, including the employee's **Employee TPS, Salary Factor, TPS Factor, aTPS, aTPS with Time Prorate,** and **New Base Salary**. Hover over these figures to show the math used.

Employee TPS is the employee’s TPS for the applicable performance period. It is determined by calculating the TPS based on the days for each rating, combining interim scores and any Fixed TPS conditions that are met.

Salary Factor is calculated by dividing the employee's base salary by the lowest base salary in the pool, then multiplying by 33%.

TPS Factor is calculated by dividing the employee TPS for the current employee by that of the lowest TPS in the pool, then multiplying by 67%.

aTPS is determined by adding the Salary Factor and the TPS Factor, then multiplying it by the Employee TPS

aTPS with Time Prorate is the final TPS used for determining the MBC reward. This is the aTPS multiplied by any time proration, such as adjustments for part-time, employees that started during the rating cycle, or any time proration conditions that were met.

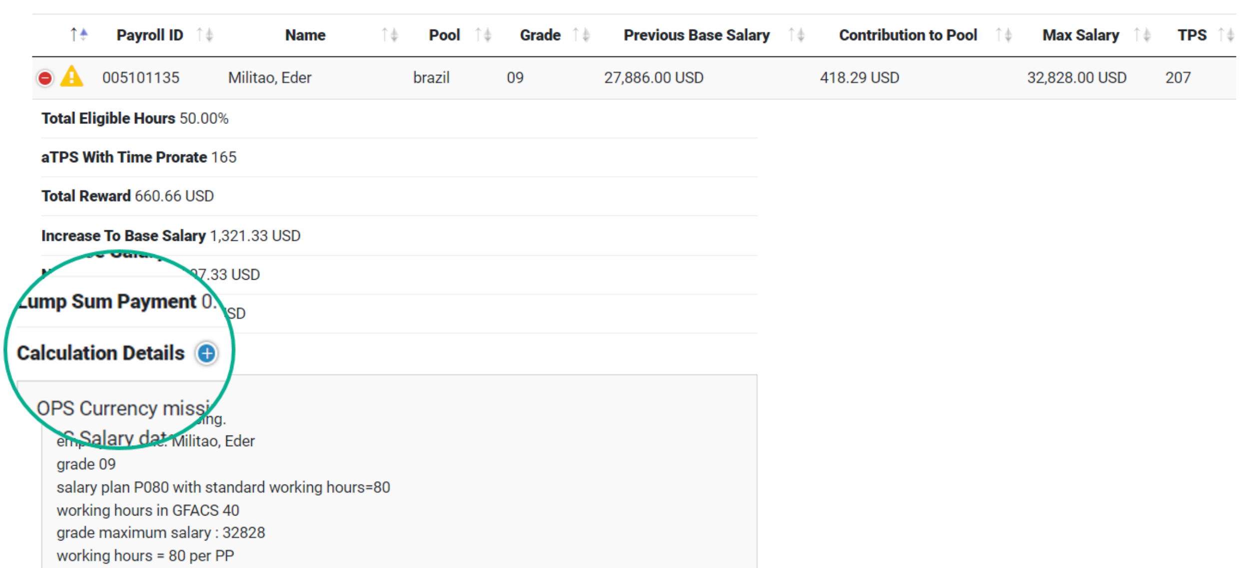
Increase to Base Salary shows the amount of the reward to be added to the employee's salary.

New Base Salary is the employee's previous base salary added to the increase achieved in this period.

Calculation Details shows the complete log of how RCA performed the calculation. Select the + icon for more details.

Total Reward is the amount to be paid to the employee.

- Select **Column Visibility** to customize the display of the main list.

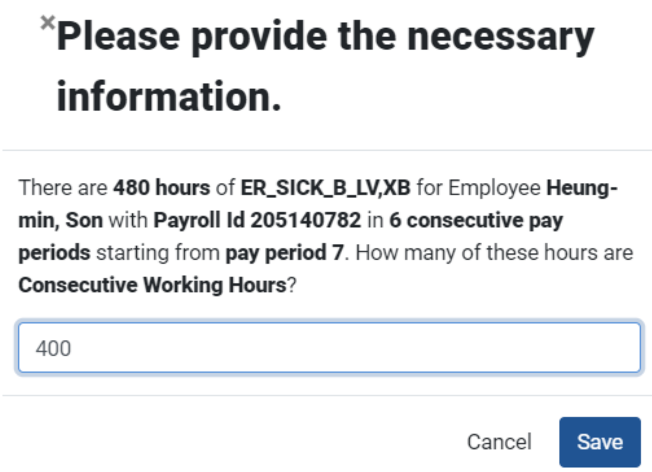


ADDING MISSING INFORMATION

If you have set either time proration or Fixed TPS proration conditions that require a consecutive time frame, you may see some items marked for your attention. You will need to provide RCA with more information before it can calculate an employee's reward.

For example, if an employee was on leave without pay for more than 80 hours across pay periods and your condition requires 80 consecutive hours of LWOP, then RCA will ask you to confirm the consecutive working hours the employee was actually absent.

Expand the entry to see the **Calculation Details**, scroll to the bottom of the calculations and select Provide Input. RCA will present you with questions to answer. Enter the relevant amount of the consecutive time period and Save.



CALCULATION ADJUSTMENTS

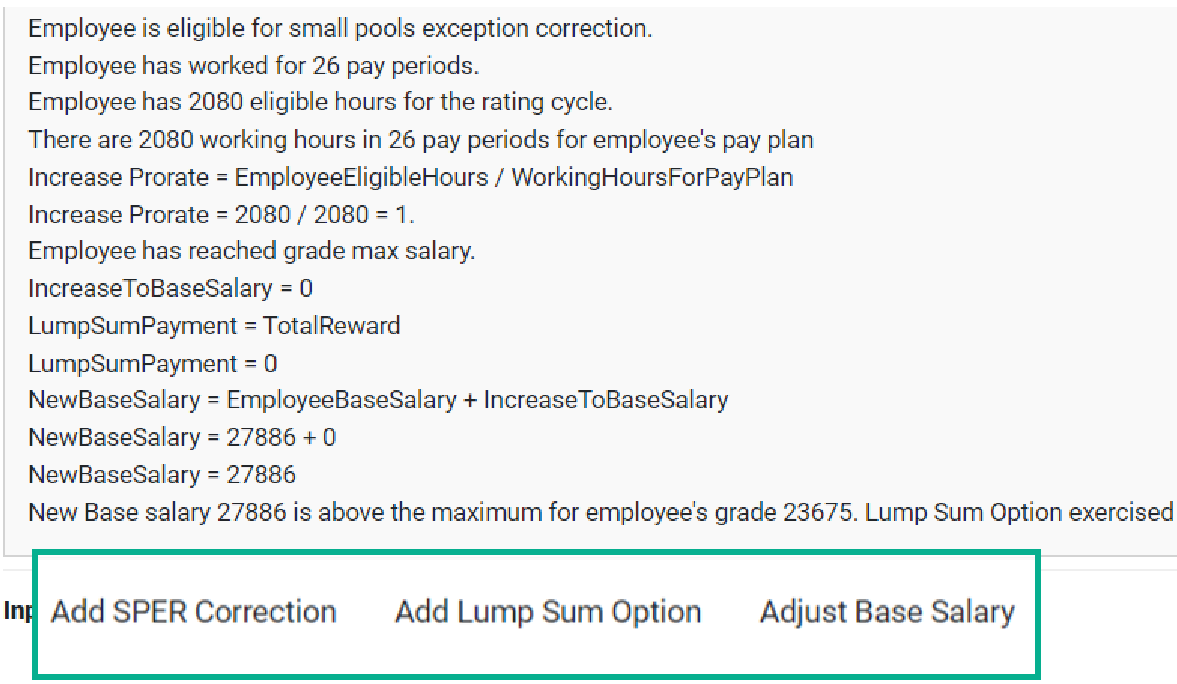
After calculations are run, certain values can be updated by the Reward Calculation Mission Admin, specifically an adjustment to the base salary, a lump sum option, or a SPER correction.

Adjust Base Salary option should be used if the employee's salary has changed since the end of the performance period. In this situation, the reward calculation will be based on the salary reported in the CGFS import. Adjusting the base salary will not change the reward, but will only change the base salary to which the reward is applied. This option can only be used if the calculations are not locked.

Add Lump Sum Option should be used if your Mission allows for an optional lump sum reward and the employee choses to exercise this reward. The lump sum can be a partial or full reward amount. This option can be used either before or after calculations are locked.

Add SPER Correction can only be used if the employee is in a small pool of 3 or less employees. If a pool supervisor requests a SPER, the SPER simulation tool can be used to determine the SPER value (see section **SPER Simulation** for more details). Once the SPER value is determined, the difference between the original reward and the SPER reward should be entered here. Negative numbers can be entered if the SPER decreases the reward. This option can be used either before or after calculations are locked. Once the pool supervisor has digitally approved, this option will no longer be available. If changes are needed, recall the approval for the pool.

To adjust any of the three values above, expand the entry. Scroll to the bottom of the calculations and look for the appropriate button to either **Adjust Base Salary**, **Add Lump Sum Option**, or **Add SPER Correction**.



NEXT STEPS

Optionally, select **Download Calculation** to get a copy of calculations for all pools. Each pool is contained in a separate spreadsheet file. Only need one pool? Select the pool name from the dropdown before downloading.

Need to start over? **Clear Calculation** removes all calculations.

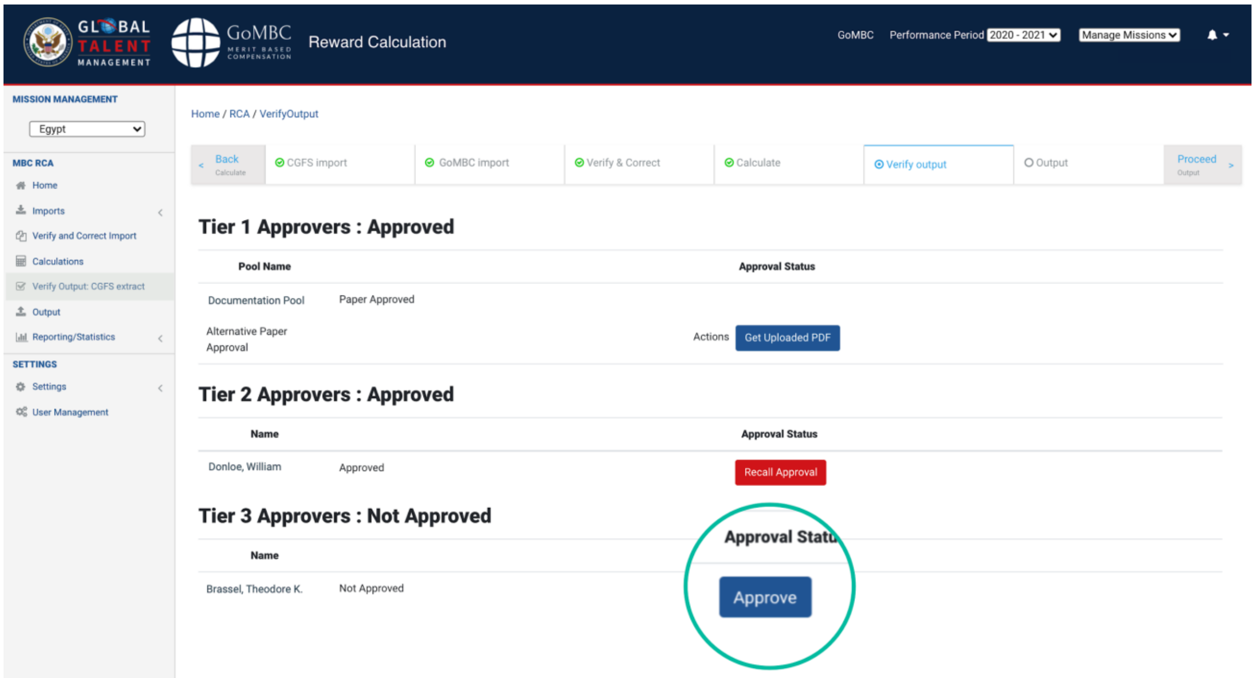
When all the calculations look good, select **Proceed** to continue.

VERIFY OUTPUT: CGFS EXTRACT

In the fifth step of the calculation process you will request approvals from **Pool Supervisors** and mission management.

The progress tracker should show **Verify Output**. Or from the RCA menu, select **Verify Output: CGFS Extract**.

The RCA approval flow comprises 3 tiers that must be completed in sequence.



Tier 1 is where **Pool Supervisors** approve calculation reports for their assigned pools.

Tier 2 is for the **HRO** or **Management Officer** to approve all final MBC reward calculations for their mission.

Tier 3 is final approval from the **Deputy Chief of Mission (DCM)** or other appointed person before calculations for the mission are sent to payroll.

- The GoMBC **Reward Calculation Mission Admin** can assign people to these roles by editing the **Mission Profile**.

SETTING AN APPROVAL TYPE

Decide how the **Tier 1** approvers should review and approve the calculations. Use **Add Comment** to write a note to the assigned approvers. Tier 2 and Tier 3 approvers must approve in the application.

Digital Approval allows tier 1 approvers to approve either directly in the application or via a paper form that can be uploaded.

Paper Approval requires the GoMBC **Reward Calculation Mission Admin** to download a PDF version of the calculations ready for signing and uploading for tier 1 approvers.

APPROVING CALCULATIONS

When ready for digital approval, notify Tier 1, Tier 2, and Tier 3 supervisors that calculations are ready for review. They will sign into RCA and from the Reward Calculation menu option in GoMBC. To view the calculations for their pool, they can select **Calculations** to view all calculation details for the employees within their pool(s) or select **Verify Output: CGFS Extract** to download and view the pdf approval form with calculation information.

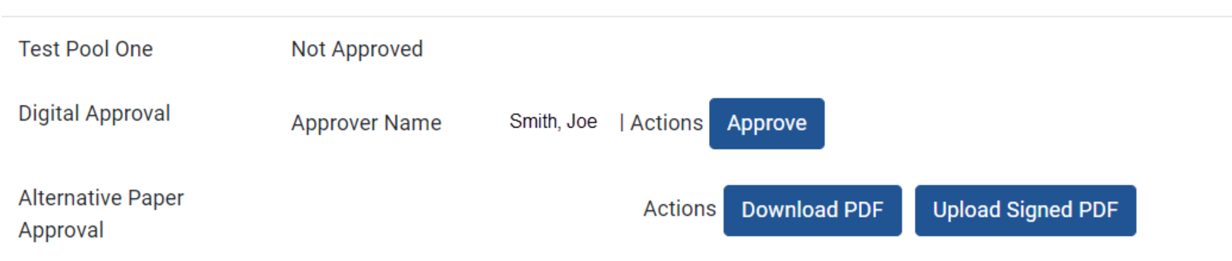
If everything looks good, they will proceed to **Verify Output** (or select **Verify Output: CGFS Extract** from the RCA menu) and next to their name, select **Approve**.

TIER 1 APPROVAL

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

For Tier 1 approvals, paper approval is also possible. You (the **Reward Calculation Mission Admin)** can download a PDF document of the calculations. Select **Verify Output: CGFS Extract** from the RCA menu and then **Download PDF**.

Once the pool supervisor signs the document, select **Upload Signed PDF** to add it to RCA.



Tier 2 Approval

This step is completed 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 is completed when the **DCM** is satisfied with all calculations for their mission. They can **Approve** in RCA once everything looks good and can later **Recall Approval** if needed.

Next Steps

As the **Reward Calculation Mission Admin**, select **Download All** for a copy of all approved calculations. If needed, you can also **Recall Approvals** to remove all approvals and change the approval type requested.

If the pool supervisor of a small pool has requested the SPER, see the **SPER Simulation** section.

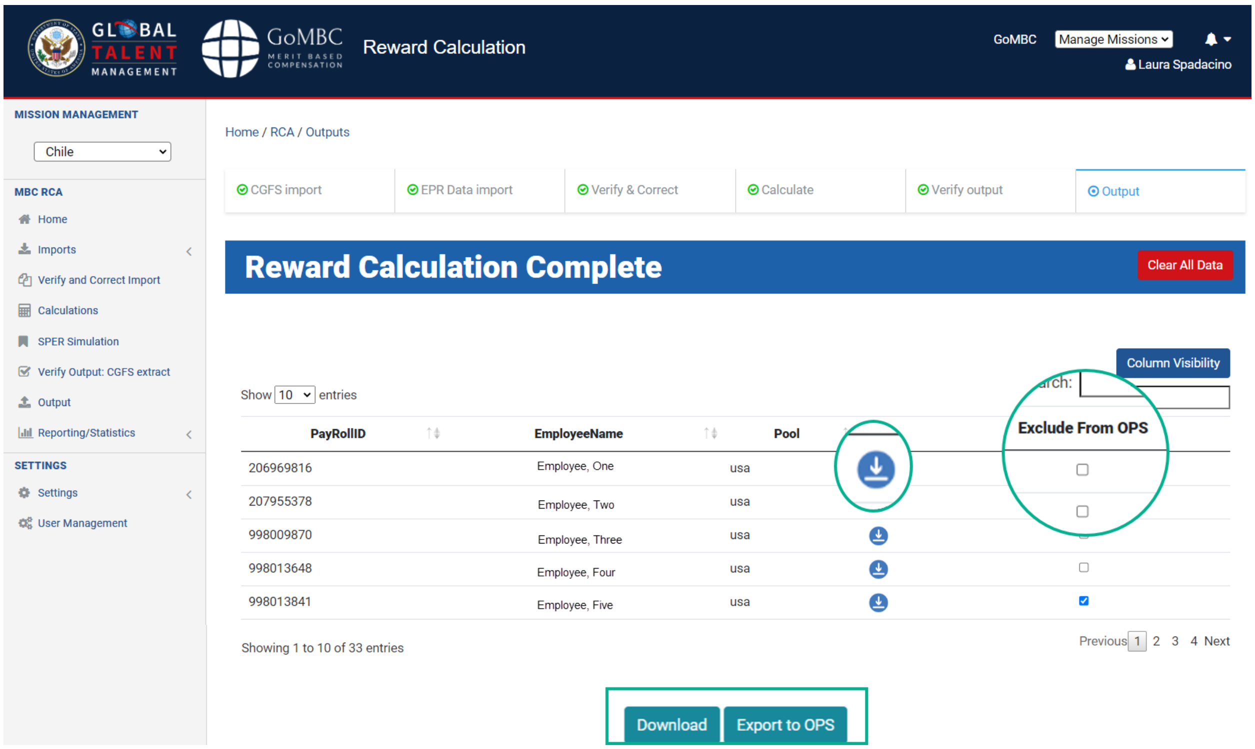
When all 3 tiers of approval are complete you can **Proceed** to the next step of creating letter templates and submission to OPS.

OUTPUT

- Only available to the GoMBC Reward Calculation Mission Admin.

In the sixth and final step of the calculation process, RCA prepares letters for each employee with a summary of their MBC reward.

The progress tracker should show **Output**. Or from the RCA menu, select **Output**.



The list shows employees, including their **Name**, **Pool** and **Payroll ID**. For any entry, hit the icon for a copy of the personalized letter the employee will receive. Or select **Download** to get them all in one archive.

Each letter is based on one of several **Individual Memo** templates (set up in the **Mission Profile**) used when (for example) the employee chooses a lump sum payment or has reached the maximum salary for their grade.

- As the **Reward Calculation Mission Admin**, you will distribute these letters to each employee.

Exporting to OPS

Salary changes and lump sum information can be sent automatically to the **Overseas Personnel System (OPS)**. If any employees eligible for a reward have since departed the Mission, you will first need to select the checkbox to exclude them from the OPS submission. For these employees, the termination action must be adjusted to include the reward value as OPS does not process personnel actions for terminated employees.

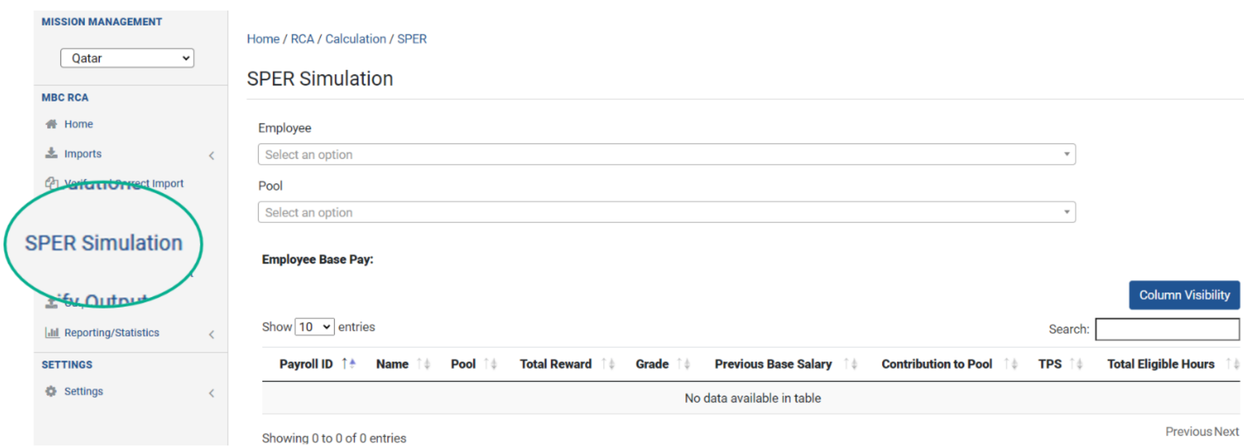
Select Export to OPS and the calculation process is officially complete! This automatically creates a mass update group with the MBC reward information (salary adjustment and/or lump sum payment). For more information on the mass update group approval process and next steps, please refer to the **OPS Mass Update Procedures and Job Aids** SOP on the OPS SharePoint site.

SPER Simulation

- Only available to the GoMBC Reward Calculation Mission Admin.

If the Pool Supervisor has chosen to exercise the SPER, use the SPER simulation tool to see what an employee's reward would be if placed in a large pool without modifying the rewards for any employees within the large pool.

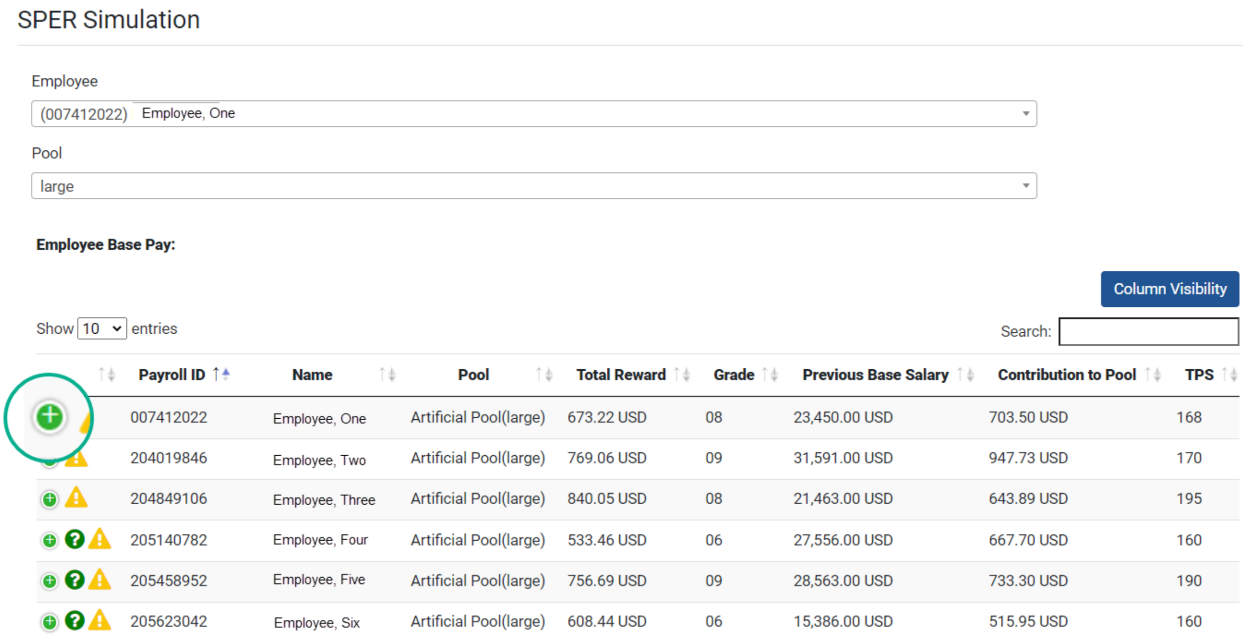
Select SPER Simulation from the RCA menu.



Next, find the employee from the **Employee** drop down. Type part or all of the employee's name to search from available options. Only employees in small pools (containing 3 employees or less) can be found here.

From the **Pool** drop down, select the large pool that the employee should be placed in for the SPER simulation. Only large pools will be available here.

The SPER simulation calculation will automatically run. A list of all employees within the simulated large pool, including original large pool employees and the selected employee from the small pool, will appear and calculation details can be viewed by selecting the plus icon.



Running this simulation will not affect calculation values on the calculation tab. To apply the SPER correction, see the **Calculation Adjustments** section.

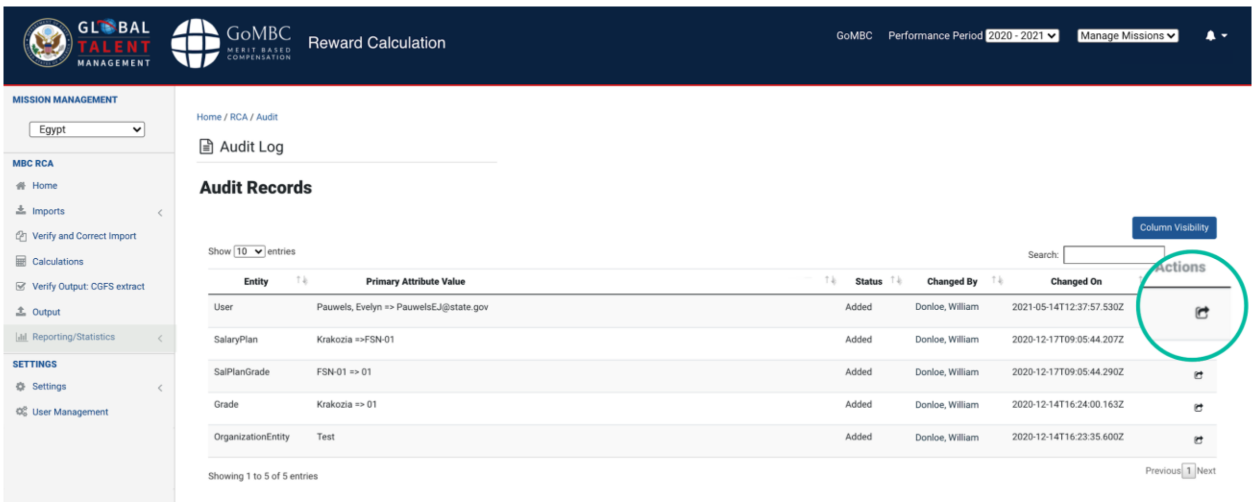
Audit Log

- Only available to the GoMBC Reward Calculation Mission Admin.

This automatically records every action performed by users of RCA. It provides an audit trail of activity and is a useful aid to diagnose technical problems.

From the RCA menu, expand **Reporting/Statistics** to reveal the **Audit Log**.

The log shows an entry for each system activity. The most recent entries are first.



Entity shows the conceptual object in RCA (such as a salary plan, a grade, or an organization)

Primary Attribute Value shows which property of an entity

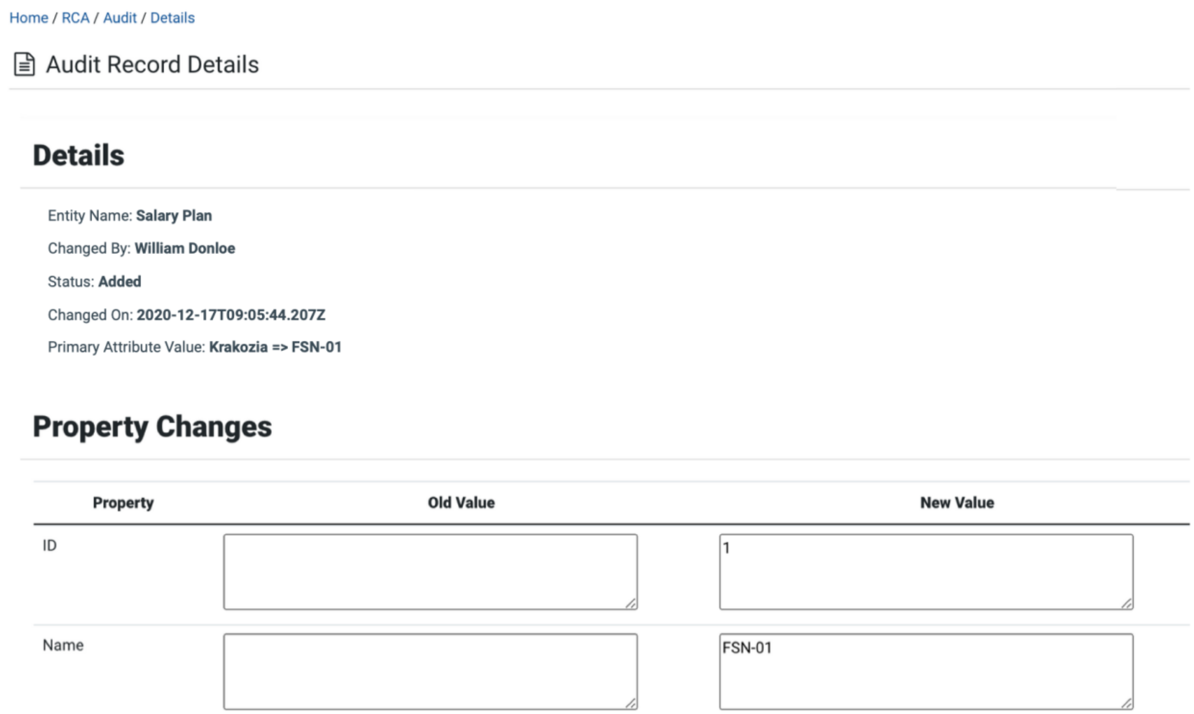
Status names the action performed (such as added or deleted)

Changed By names the person who performed the action

Changed On is the date and time the action was performed

ACTIVITY DETAILS

Each event recorded in the log can be expanded to show further details. Use the **Expand** control to open up the entry.



Specifics will vary based on the **Entity** and its **Status** but follow a similar structure.

Under the details of the entity, you'll see a record of any **Property Changes** made.

Property is an attribute or component of the **Entity**.

New Value details the information the **Property** now contains (if information was deleted, this may be blank)

Old Value details the information the **Property** used to contain (if a new instance of the entity was created, this may be blank)

STATISTICS REPORT HR

Here you can download reports or share your own statistical studies, based on data gathered during MBC reward calculation.

DOWNLOADING REPORTS

All reports are available to download as a single **.zip** archive of **.xlsx** spreadsheets.

From the RCA menu, expand Reporting/Statistics to reveal Statistics Report HR. Select this link to download the reports.

BASIC MBC INFO POST

Shows the number of employees evaluated for the selected performance period.

AVERAGE TPS BY POST

Shows the minimum, maximum, and average **Total Performance Score (TPS)** achieved within the selected mission.

TPS BY GRADE

Shows the average **Total Performance Score (TPS)** achieved at each grade level within the selected mission.

AVERAGE TPS BASED ON EMPLOYING AGENCY

Shows the number of employees working for each agency.

TPS DISTRIBUTION

Shows the spread of **Total Performance Scores (TPS)** across the selected mission.

TPS COMPARE DOS TO MISSION

Compares the minimum, maximum, and average **Total Performance Score (TPS)** of Department of State agencies with those of the mission.

TPS COMPARE NON-STATE TO MISSION

Compares the minimum, maximum, and average **Total Performance Score (TPS)** of non-State agencies with those of the mission.