

Performance Appraisal Application (PAA) CIV Trusted Agent Responsibility

Issue Date: April 2009

Assignment of a Trusted Agent

The assignment of a trusted agent begins with either a Rating Official (RO) or Higher Level Reviewer (HLR) delegating a person to be their trusted agent. Next a role is assigned to the trusted agent. The role will be either RO or HLR. The role determines what actions on behalf of the RO or HLR the trusted agent can take in the employee's PAA record. Once the RO or HLR delegates a trusted agent, the trusted agent will be provided the **CIV Trusted Agent** responsibility. This responsibility is assigned automatically, but may take up to an hour before the trusted agent has access to it. Once the responsibility has been assigned, select the PAA Acting as Trusted Agent to begin.

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Important Note: The RO or HLR will also have access to an employee's PAA record at the same time the trusted agent does. When one person is in the record, the other person will receive a message that the record has been 'locked' and that person will need to contact the other person if they need access to the employee's PAA record.

Being the Trusted Agent

Acting as the trusted agent for a RO or HLR allows you to document performance management events within the Performance Appraisal Application (PAA), such as the transcription of performance plans, interim reviews, closeout/midpoint reviews and final appraisal on behalf of the RO or HLR. A Trusted Agent has the same read/write privileges as the individual who assigned you this role. This responsibility does not provide access to your own PAA. Trusted agents can be assigned for multiple ROs and HLRs at the same time.

Responsibilities

Rating Official:

- Must approve all PAA performance events documented by the trusted agent and route the document to the next step by using one of the following methods:
 - Within the PAA, will be required to select the 'Approve Trusted Agent Documentation' box located in the employee's PAA record under the appropriate Approvals and Acknowledgements tab when documenting communication to the employee. In the case the RO does not have access to the PAA, he/she understands that their trusted agent may forward the PAA to the next person in the chain of command to accomplish this task.

OR

- The trusted agent can print a hard copy DD Form 2906 and obtain the RO signature approving the action. The trusted agent can document the fact that this has taken place for the purpose of completing the DD Form 2906 in the PAA. A printed copy of the DD Form 2906 can be obtained on the Reports/Forms tab.

Higher Level Reviewer:

- Must approve all PAA performance events documented by the trusted agent.
- The trusted agent can print a hard copy DD Form 2906 and obtain the HLR signature approving the action. The trusted agent can document the fact that this has taken place for the purpose of completing the DD Form 2906 in the PAA. A printed copy of the DD Form 2906 can be obtained on the Reports/Forms tab within the employee's PAA record.

Trusted Agent:

- Must receive approval from the RO or HLR on all PAA performance events documented.
- The trusted agent can print a hard copy DD Form 2906 and obtain the appropriate signature approving the action. The trusted agent can document the fact that this has taken place for the purpose of completing the DD Form 2906 in the PAA. A printed copy of the DD Form 2906 can be obtained on the Reports/Forms tab within the employee's PAA record.