

Performance Appraisal Application (PAA) Delegating PAA Trusted Agent Authorization

Issue Date: April 2009

Introduction

A new menu item named *Delegating PAA Trusted Agent Authorization* allows pay pool administrators (including their alternates) and human resources professionals to delegate trusted agent(s) on behalf of a Rating Official or Higher Level Reviewer. This menu item can be found under the following responsibilities: CIV Pay Pool Administrator, CIV Alternate Pay Pool Administrator, and CIVDOD Performance Management Administrator.

Important Note: Persons using this authorization must first obtain written delegation of authority from the Rating Official or Higher Level Reviewer. Based on this written delegation of authority, individuals can be assigned to act as the trusted agent on behalf of the Rating Official or Higher Level Reviewer for employees identified by the Rating Official and Higher Level Reviewer within the Performance Appraisal Application for the purpose of documenting their decisions related to performance management matters.

Rating Official Search

To begin:

1. Enter the Rating Official or Higher Level Reviewer Name that a trusted agent will be assigned on behalf of.
2. Select the 'Find' button. You will be provided with a list of names that match the criteria entered.
Important Note: For pay pool administrators (including their alternates), the results will be limited to those rating officials and higher level reviewers in the pay pools you have a role in.
3. Under the Results table, select the 'Go' button under the Action column for the Rating Official or Higher Level Reviewer.

Delegate Trusted Agent Assignments

Trusted Agent Role

1. Select the role under the Role drop down menu that the trusted agent will act as on behalf of the Rating Official or Higher Level Reviewer.
2. Select the 'Go' button.
3. The [▶ Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#) link and Delegations Results table will appear.

Show Manage Assignment of Trusted Agent for Selected Employee(s)

1. Select the [▶ Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#) link to expand the area to assign or terminate trusted agent assignments individually or in mass.
Important Note: This link is optional. You can go directly to the Results table to assign trusted agents individually.

2. Select one of the following areas to update:

Assign Trusted Agent

1. Enter Trusted Agent Name - This is a required field. Enter the name you want to assign a new authorization or to modify an existing authorization.
2. Enter Start Date - This is a required field. The date can be a future date, but not earlier than the current date.
3. Enter End Date <Optional> - An End Date can be entered to limit the assignment period. If entered, the end date cannot be less than the current date or the Start Date, whichever is greater.
4. Select employee(s) under the Select column on the Results table for whom you want to assign the Trusted Agent authorization.
5. Select the 'Apply' button.

Terminate Trusted Agent

- Enter End Date - The end date entered will take affect the end of day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date.
- Select employee(s) under the Select column on the Results table. **Note:** End Date must be blank.
- Select the 'Apply' button.

Results Table

The Results table will display employees based on the criteria previously entered under Rating Official Name and Role. The trusted agent for each employee can be identified individually or assigned in mass, select the [▶ Show Manage Assignment of Trusted Agent for Selected Employee\(s\)](#) link above the table.

Important Note: If the Organization field is blank, it is an ex-employee record.

If the field is blank, you can enter:

- Trusted Agent Name - Enter the name you want to assign a new authorization or to modify an existing authorization.
 - Start Date – Enter a Start Date. The date can be a future date, but not earlier than the current date.
 - End Date – Enter an End Date. The End Date cannot be less than the current date or the Start Date, whichever is greater.
- Important Note:** Once an End Date is entered, a new row will be shown for that employee to allow entry of another Trusted Agent assignment.

Show or Hide Details

Select the 'Show' or 'Hide' link to display or collapse Employee Info and Trusted Agent History.

[▶ Show](#) [▼ Hide](#)

Employee Info and Trusted Agent History	
Employee Number	88512
Employee Name	Bogue, Serafina F
Position	E4483.IT SPECIALIST (SYSANALYSIS).652752.DD07.APPR
Job	2210.Information Technology Specialist (NSPS)
Pay Schedule/Pay Plan	YA
Pay Band/Grade	02
Organization	Defense Energy Support Center DD07PA0000 01
History	
Trusted Agent Name	Start Date End Date
MACE, KEN K	09-Apr-2009 09-Apr-2009