

# Performance Appraisal Application (PAA) Manage PAA Trusted Agent Authorization

Issue Date: April 2009

## Introduction

A new menu item named *Manage PAA Trusted Agent Authorization* allows rating officials and higher level reviewers to assign a trusted agent(s) to act on their behalf within the Performance Appraisal Application for employees they identify for the purpose of documenting their decisions related to performance management matters. This authorization does not alleviate rating official or higher level reviewer's performance management responsibilities to continue the hands-on work of monitoring, reviewing and appraising employees on their performance and that the sole purpose of the trusted agent is to document their decisions in the employees' PAA records. This menu item can be found under the following responsibilities: My Workplace and Civ Rating Official.

**Important Note:** Rating officials and higher level reviewers must approve all PAA performance events documented by my trusted agent and route the document to the next step by using one of the following methods:

- Select the 'Approve Trusted Agent Documentation' box located in the employee's PAA record under the appropriate Approvals and Acknowledgments tab. In the case that the rating official or higher level reviewer does not have access to the PAA, they understand that their trusted agent may forward the PAA to the next person in the chain of command to accomplish this task.  
OR
- Their trusted agent can print a hard copy of the appraisal form and obtain my signature approving the action. Their trusted agent can document the fact that this has taken place for the purpose of completing the appraisal form in the PAA.

## Manage 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 for 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
<b>History</b>	
<b>Trusted Agent Name</b>	<b>Start Date</b> <b>End Date</b>
MACE, KEN K	09-Apr-2009      09-Apr-2009