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# Release Notes

USA Performance is the U.S. Office of Personnel Management’s software solution to assist Federal agencies in implementing their Senior Executive Service (SES) performance management programs and systems. USA Performance enables agencies to automate their performance appraisal process throughout the entire performance rating cycle. Agencies can develop performance plans, track and monitor employees’ performance, provide feedback and ratings, and electronically sign performance plans as agency appraisal programs require. By streamlining the process, USA Performance allows agencies to focus on results and for performance management to happen in real time. USA Performance is a user-friendly, web-based application that includes customizable features. USA Performance is compliant with Federal performance management regulations and meets Federal Information Technology (IT) security requirements.

# USA Performance Is Designed To:

* Facilitate interactive and continual communication to cultivate a more productive and engaged workforce
* Increase visibility and transparency of the performance management process
* Align individual performance with organizational goals
* Enhance the accountability of the existing performance management process
* Increase organizational and individual performance
* Help agencies easily implement performance management best practices and policy suggested by Government Performance and Results Modernization Act, Human Capital Assessment and Accountability Framework ([HCAAF](http://www.opm.gov/policy-data-oversight/human-capital-management/)), Performance Appraisal Assessment Tool ([PAAT](http://www.opm.gov/policy-data-oversight/performance-management/measuring/)), and the Goals-Engagement-Accountability-Results initiative ([GEAR](http://www.lmrcouncil.gov/meetings/handouts/GEAR%20Report%2011-17-2011.pdf))
* Build better agency performance management programs and systems:
  + Cascade strategic goals to increase alignment
  + Write better performance requirements/standards
  + Link individual performance to organizational performance
  + Ease agency performance reporting requirements

# USA Performance Offers Agencies:

* Flexibility to adapt system to agency SES performance management processes
* Training and other online resources for system adoption
* Compliance with Federal IT security requirements
* Compliance with Federal performance management requirements
* Helpdesk email support for users
* Complete hosting in a secure Federal facility
* System and data redundancy at a Federal disaster recovery site

## v.1.0.0 Release – July 8, 2014

Initial System Features for SES:

CORE SYSTEM FEATURES

* Easily navigate between the planning, monitoring, and rating steps in the performance management cycle.
* Switch between available fiscal years to view performance plans.
* Administrative module which allows the HR Administrators the ability to create and manage new agencies, organizations and users. HR Administrators can also manage element weight settings, number of progress reviews, and rating settings.
* Dashboard provides (a) graphical summary of the performance management cycle (b) identifies where each employee plan resides in the overall process and (c) alerts the user to any pending tasks awaiting their action.
* Resources section includes quick start guides to assist the user in getting started and a link to online system training.
* Allow users to find and establish a proxy user to access their performance plan. Proxies are able to make changes to performance plans but cannot sign performance plans.
* Request help desk support from within the system.
* Build and store SES performance appraisal plans for each fiscal year
* Provide agency-specific performance requirements for each critical element.
* Develop performance requirements with weights and ratings for Critical Element 5. Results Driven. Add additional performance requirements as needed.
* Assign different user roles
* Electronic signatures
* Document mid-year, quarterly, and/or other progress reviews
* Track approval process
* Track real-time feedback, performance results, and accomplishments
* Align organizational goals with performance requirements
* Upload employee and other supporting documents
* PIV enabled log-in

SES SPECIFIC SYSTEM FEATURES

* Build performance appraisal plans consistent with the new OPM SES PM System guidelines
* Ability to modify information in SES performance appraisal plan Part 8 to include specific agency information.
* Generate standard OPM SES performance appraisal form
* Route performance plans to higher level reviewing officials
* Support standard and customized weighting for SES executive Core qualifications (ECQs)

## v.1.1.0 Release – September 26, 2014

Release Summary: Release v.1.1.0 contains features that allow the Rating Officials to complete the initial rating process for the SES evaluation, and continue the SES evaluation process through a Higher-level or Reviewing Official review, the Performance Review Board (PRB) review and PRB Chair signature, and finally on to the Appointing Authority review / signature process. In addition, miscellaneous features have been included to support each of these processes.

Initial Rating Phase / Performance Review Board & Appointing Authority Features:

* Executive’s self-accomplishment narrative
* Rating Official initial rating values by performance requirements
* Derivation Formula applied to executive’s initial rating (including Critical Element 5)
* Rating Official narrative summary
* Reviewing Official review process
* Executive request for Higher-level review
* Higher-level review process
* Ability to release initial rating to PRB upon executive refusal to sign
* HR Admin functionality to assign users as PRB members, PRB Chairs, and Appointing Authority
* PRB members and chair review of agency plans and PRB Chair signature process
* Appointing Authority review of agency plans and signature process
* Dashboard & Performance Management pages reflect plan status and pending action items, including tasks for:
  + Executive signatures, Reviewing Officials or Higher-level reviews and signatures, HR Admins assigning higher-level reviewers, and PRB Chair and Appointing Authority reviews / signatures
* Other System Features:
  + Planning & Monitoring phases include signature prompts to encourage communication between the executive and his/her Rating and Reviewing Officials
  + Rating Official progress review notes (private until released to the Executive)
  + UI changes to make it easier for the HR Admin to manage user roles
  + Agency-specific resource document upload (HR Admin users only)
  + System-wide resource document upload (System Admin users only)
* New Agency-level setting (controlled by the agency’s HR Admin):
  + Option to mandate Reviewing Official input during the Rating process
  + Fiscal Year roll-over of executive plans based on agency FY end dates
  + New fiscal year plan option to carry-over performance plan text from the previous FY plan
  + Access to previous fiscal year performance plans
  + HR Admin view access to agency performance plans

## v.1.2.0 Release – December 12, 2014

Release Summary: Release v.1.2.0 contains enhancements to the planning and rating phases. It also contains new Agency settings that are managed by an agency’s HR Administrator, as well as further updates for an agency’s HR Administrator to manage his/her agency users and plans more effectively.

v.1.2.0 System Features:

* The Executive’s self-accomplishment narrative in Part 7 is no longer able to be edited after submission to his/her rating and reviewing officials
* Performance plan text areas are enabled for the native browser spell-checking functionality
* Save functionality is more easily accessible on the evaluation page (top row icon)
* Enabled printing of incomplete evaluations (plans missing required data items)
* The performance plan is expanded to includes “Plan Notes” to facilitate communication among those working on a performance plan
* To reflect pre-approved agency policy, HR Agency Administrators may configure their agency’s plans to allow or disallow individual rating values for Critical Element 5 (Results Driven)
* If agency policy permits, HR Agency Administrators may configure their agency’s plans to weight individual rating values for Critical Element 5 (Results Driven)
* HR Agency Administrators may advance plans directly from Planning to the Rating Phase (bypassing mandatory agency progress reviews) as necessary to rate an executive leaving the agency prior to the agency’s normal rating period
* HR Agency Administrators may remove plan signatures if a plan change is necessary (after signing by all parties in the Planning phase); requires agreement and signatures of all parties again
* HR Agency Administrators may inactivate an agency user to prevent system access
* HR Agency Administrators may update an agency user’s email address
* HR Agency Administrators must first reassign all currently associated executives from a rating or reviewing official before removing the rating or reviewing official user roles
* HR Agency Administrators are able to change the text of their agency’s rating labels
* HR Agency Administrators are able to change the standard language in the SES performance plan so that it matches their agency's OPM approved SES plan template
* HR Agency Administrators may add SSN values for their agency users to facilitate future eOPF integration (data is masked, encrypted, and will never be displayed within the system)
* New HR Agency Administrator tasks are generated for the following:
* to review plans if executives and officials agree to plan changes after the initial Planning phase review was completed
* to assign new officials for executives when their previous officials were inactivated (for example, no longer employed by an agency)

## v.1.2.2 Release – March 20, 2015

Release Summary: Release v. 1.2.2 contains enhancements to new Agency settings that are managed by an agency’s HR Administrator, as well as further updates for an agency’s HR Administrator to manage his/her agency users and plans more effectively.

v.1.2.2 System Features:

* HR Agency Administrators are able add standard language for all agency SES in the “additional agency specific performance requirements” section of the performance elements except the Results Driven Element.
* For each of the first four elements HR Agency Administrators can lock the standard language added to the “additional agency specific performance requirements” section or allow those sections to be edited.

## v.1.2.3 Release – May 8, 2015

Release Summary: Release v.1.2.3 contains minor corrections and / or enhancements to existing functionality.

v.1.2.3 System Features:

* Adjustments to ensure HR Administrators are able to view/edit users in their organization
* User’s phone number is no longer a required field when adding or editing users
* Corrected an issue to ensure Critical Element 5 text is not changeable after completion of all signatures in Planning
* Corrected an issue so that when an HR Administrator locks Agency-specific text, changes are allowed to the associated element weight
* Added web browser adjustments for:
  + An optional setting if downloadable fonts are disabled
  + Additional text (Login page) on system supported browser versions
  + Adjustments for performance improvement for document uploads
  + Corrected an issue that prevented users from including an ampersand (&) when resetting a password

## v.1.3.0 Release – August 05, 2015

Release Summary: Release v.1.3.0 contains corrections to reported issues, performance and security enhancements, as well as a new feature.

v.1.3.0 System Features:

* HR Administrator users have the ability to modify SES evaluations for their agency members
* Various performance and security enhancements
* Corrections to the following:
  + Rating error in Critical Element 5
  + Final rating not appearing on evaluation for plans having different initial / final scores
  + Executive listed on official’s dashboard with incorrect sub-phase upon requesting a higher level review
  + PRB Chair’s dashboard signature task appears before higher level review signature completion

## v.1.4.0 Release – September 25, 2015

Release Summary: Release v.1.4.0 contains enhancements to existing SES functionality.

V.1.4 System Features:

* Agency HR Administrator’s ability to choose when to release a new Performance Management Cycle to agency users
* Appointing Authority functionality to choose groups (batch) of SES performance plans for approval / signature
* Performance Element default weights for new SES plans are set initially to the agency’s minimum weight value assigned by the Agency HR Administrator

## v.1.4.1 Release – November 6, 2015

Release Summary: Release v.1.4.1 contains one correction to existing SES functionality.

V.1.4.1 System Features:

* Correction to the printed (PDF) SES evaluation form regarding the calculation of CE5’s rating value when multiple goals are specified

## v.1.5 Release – December 14, 2015

Release Summary: Release v.1.5 contains minor system corrections and new SES functionality.

V.1.5 New System Features:

* Reporting for Agency and Organizational Administrator users
  + Certification Report
  + Rating Distribution Report
  + Plan Progress Report

## v.1.5.1 Release – January 26, 2016

Release Summary: Release v.1.5.1 contains new functionality and minor system corrections.

V.1.5.1 New Features:

* Agency Administrators have the ability to remove Executive Signatures from Part 3 (Rating) until the Performance Review Board (PRB) Chair signature is complete
* The PRB ratings are no longer visible to Executives, Rating & Reviewing Officials until after the Appointing Authority signature process is complete

V.1.5.1 Corrections:

* Printed Evaluation - PDF Updates
* Text in Parts 6 and 7 are included only when displayed on the evaluation’s web page
* Critical Elements display in a consistent order
* Administrator updates
* Add/Edit User – the SSN field value is not removed when a user’s organization field is changed
* Nonfunctioning filter removed on page listing users without an SSN value
* Updated the user’s email address field to allow an apostrophe as a valid character
* Correction to message displayed on the Contact Page when a user clicks the Reset button
* Reviewing Official Sign button for the Monitoring phase is no longer available once the evaluation is signed by the Rating Official in the Rating phase
* A Higher Level Reviewer is granted access to the assigned executive’s plan for that Fiscal Year (FY) only
* Corrected a bug in the Rating Distribution Report
* Various minor text changes

## v.2.0 Release – August 30, 2016

Release Summary: Release v.2 contains new functionality related to Performance Management preparation tasks in support of the Non-SES Planning Phase, as well as minor system corrections.

V.2.0 New Features:

* Updates to User Profile Page
* eOPF (Submission & Report)
* Template Wizard
* Assign Employees to Templates
* Performance Element Library
* Agency Strategic Goals Library
* Agency Seal Upload
* Plan Creation
* Planning Phase (sign / un-sign)
* Document Upload to Plans
* Performance Cycle Selection
* General Plan Notes

V.2.0 Enhancements:

* Minor enhancements related to Section 508 Compliance
* Minor text updates / bug correction

## “SES FY17 Updates” Release – September 29, 2016

Release Summary: Release “SES FY17 Updates” contains OPM-approved changes to SES Performance Agreements for the FY 2017, as well as several minor system corrections.

Additional Feature(s):

* Printing Non-SES performance plans

Enhancements:

* SES Performance Agreement Updates for FY 2017
* Bug fixes applied to Report filter selections
* Corrections applied to filters ensuring only active users are available for assignment to the Performance Review Board & Appointing Authority roles

## “PRB Notes” Release – November 01, 2016

Release Summary: The “PRB Notes” release includes new system functionality of a notes area for the Performance Review Board usage, as well as several minor system corrections.

Additional Feature(s):

* Performance Review Board (PRB) Notes

Enhancements:

* Performance Element Library - Element text expansion to 5,000 characters
* Template Wizard - (Bug) Strategic alignment saves for optional elements; manually added elements text expansion to 5,000 characters
* Manage Templates - (Bug) Last Updated By column correctly displays user name
* Plan Creation – format improvements in Print; (Bug) Element data saved when Rating Official adds optional element
* (Bug) User profile fields not editable for deactivated users
* (Bug) Display of user notification if special character not included in password

## Non-SES Monitoring Phase Release – February 8, 2017

Release Summary: The Non-SES Monitoring phase release includes new system functionality for Non-SES users to conduct progress reviews, new functionality for organizational and division administrators, and several minor system corrections.

Additional Feature(s):

* Non-SES monitoring phase available to conduct progress reviews based on plan template settings
* Organizational and Divisional Administrators may now perform several functions related to managing the performance management process that were previously limited to agency administrators, but they may only do so in their respective organization units and below

Enhancements:

* Rating officials can edit performance elements of their employees
* Template wizard – Agency admin can choose where rating official narratives are required in a performance plan
* Template wizard – minor updates to template review page
* Location field in user profile is no longer required.
* Improved PIV authentication
* Updates to the format of Non-SES plan Adobe PDF printout
* Bug fixes to enhance webpage viewing, template review, and performance plan viewing/editing.

## Non-SES Rating Phase Release – May 31, 2017

Release Summary: The Non-SES Rating phase release includes new system functionality for Non-SES users to conduct end of the performance cycle review, Personal Identity Verification (PIV) card enforced login, and several minor system corrections.

Additional Feature(s):

* Non-SES Rating phase available to users that use a narrative rating derivation formula on their performance plans to determine a summary rating.
* PIV card login can be enforced. Agencies can login using their PIV card only and not allow username and password logins unless there is an exception. Agency administrators can request to turn this feature on by contacting the USA Performance Program office.

Enhancements:

* Template wizard update to allow Rating Official and Proxies to edit Non-SES sub-elements.
* Indicator for when progress review notes are entered by a proxy.
* Template Wizard redesign to allow for versioning of templates.
* Non-SES Performance plan updates.
* Passwords are healthy for 120 days for agencies that are non PIV-enforced.
* Rating cycle on the dashboard now defaults to Non-SES or SES based on the users own plan.

## Non-SES Signature Bypass Release – June 29th, 2017

Release Summary: The Non-SES signature bypass release includes new system functionality for Non-SES users to bypass employee signatures in the planning and monitoring phase.

Additional Feature(s):

* Administrators at all levels, Rating Officials, and Reviewing Officials can bypass an employee’s signature on the plan if they refuse or are otherwise unable to sign the plan.

Enhancements:

* Improved security with administrator lockouts.
* Users marked as inactive no longer show on the rating or reviewing official’s tasks or dashboard.
* Minor bug fixes.

## Notifications Release – July 27th, 2017

Release Summary: The notifications release includes new system functionality for users, which notifies them when they to take action during the SES and Non-SES performance cycles.

Additional Feature(s):

* Email notifications for SES and Non-SES users.

Enhancements:

* Improved PIV functionality for multiple agency codes.
* Improved the appearance of signatures for both USA Performance web pages and PDF printouts.
* Minor bug fixes.

## Weighted and Mean Rating Release – October 11th, 2017

Additional Feature(s):

* Non-SES Performance Cycle Rating Phase processes in support of Weighted & Mean Derivation Formulas.
  + Includes Calculated rating overrides and non-critical elements excluded from ratings.
* Two week Administrative override for PIV-enforced users to allow user with broken or missing PIV card to login using a username and password.

Enhancements:

* Agency Administrator action required for inactive administrator accounts.
* Minor bug fixes

## Import Users Release – November 9th, 2017

Additional Feature(s):

* Agency Administrator can now create and manage a large agency’s users more effectively.
  + File-based user creation process to create multiple accounts at one time.
  + Assign rating and reviewing officials to groups of users at one time.

Enhancements:

* Inactivity session timeout (displays session timer clock on browser tab).
* Performance Dashboard improvements for usability.
* PIV-enforced users may update their previous PIV registration when new PIV cards with changes are issued by their agency.
* Non-SES Rating Phase – updates to narrative derivation plans.
* Non-SES Rating Phase Organizational Chart.
* Minor bug fixes.

## Non-SES Reports Release – January 23rd, 2018

Additional Feature(s):

* Non-SES Performance Plans Progress Report.
* Non-SES Rating Distribution Report.
* Quarterly Privileged User Access Report.
* Administrators can copy Plan templates.
* Administrators can delete performance elements and plan templates from their respective libraries.

Enhancements:

* Cleaner look for the official digital signatures.
* Improvements to email notifications.
* Improved 508 compliance.
* Minor bug fixes.

## Plan Status Release – July 5th, 2018

Additional Feature(s):

* Corrected plan signatures to meet policy requirements for submitting electronic documents to eOPF.
* Created database fields for multiple performance plans and rating cycles.
* Creating and editing rating cycle groups.
* Assigning users to default rating cycles.
* Updates to the document upload fields.

Enhancements:

* Plan Status dropdown added to all performance plans for Active, On Hold, and Closed.
* Ability to have more than one performance plan during one rating cyle.
* Managing plan creation was added to user profile page.

## Multiple Performance Plans and Rating Cycles Release – September 26th, 2018

Additional Feature(s):

* Updated user interface to the Dashboard and Performance Management pages.
  + The Dashboard reordered tasks, opened up all tasks regardless of rating cycle or pay plan, streamlined task process, and allows users to access all active performance plans.
  + The Performance Management page has consolidated the plan phases, rating years, and SES v. Non-SES performance plans into one convenient table. The filters have been updated, and made more pertinent for the new features.
* Agency admins have been given the ability to add rating narratives for SES performance plans.
* USA Performance is now a registered trademark, and the branding has been updated accordingly.

Enhancements:

* Rating cycles can be created and users can be assigned to those.
* The final features for allowing multiple performance plans in one rating cycle have been added to the system via the user profile page.
* Minor bug fixes.
* 508 compliance items have been addressed.

## Performance Review Board (PRB) Enhancement Release – November 8th, 2018

Additional Feature(s):

* ForeSee has been implemented to assess end user experiences with USA Performance.
* 508 issues have been addressed.

Enhancements:

* PRB groups can be created and managed from the Admin page.
* The PRB member and PRB chair roles have been consolidated into one user role. PRB chair and member distinctions can now be managed at the group level.
* PRB groups can be assigned to executives for review and recommended ratings during the PRB process.
* PRB notes have been updated to allow for members to keep those notes private, release them to other PRB members, or retract notes they no longer want public.
* PRB chairs can batch sign for PRB recommendations.
* Minor bug fixes.

## SES Pay Plan Updates Release – December 6th, 2018

Additional Feature(s):

* System Admins have been added to the proxy table for end users to add to their accounts. Once added, System Admins can act as an end user to assist with answering technical questions.
* Rating Officials have a “View My Employees’ Active Plans” link added to the Quick Links section of the dashboard. This brings them to a filtered list of only active plans and plans that are ready to be created.

Enhancements:

* The EV and FJ pay plans have been added to the SES template. Users that that are assigned an EV or FJ pay plan will get an SES performance plan in accordance with their agency SES settings.
* The EV and FJ pay plans have also been added to the SES reports sections.