

# USA Performance® Power BI Interactive Reports Overview Guide

Last updated 5/26/2026

# Table of Contents

[I: Purpose and Overview](#)

[II: SES Plan Activity & Progress Report](#)

[III: SP Plan Activity & Progress Report](#)

[IV: Non-SES Plan Activity & Progress Report](#)

[V: Administrative Profile](#)

[VI: eOPF Submission Status](#)

[VII: Performance Review Board](#)

[VIII: USAP Ratings – Non-SES](#)

[IX: USAP Ratings – SES](#)

[X: USAP Ratings - SP](#)



# I: Purpose and Overview

This USA Performance® Power BI Interactive Report Overview Guide serves to provide a brief narrative on each of the interactive reports (i.e., reports with high-level metrics and visualizations) and their respective report pages.

Power BI is Microsoft product that provides faster load times and improved data availability, as compared to the stock reports found in the Reports section in [usaperformance.opm.gov](https://usaperformance.opm.gov). This web-based functionality enables cloud storage to eliminate single-server bottlenecks and improves performance. Additionally, Power BI enables dynamic visualizations, self-service analytics, and deeper insights vs the static Excel-like output found in the aforementioned stock reports.

Currently, six reports exist in the USA Performance® Management App:

**SES Plan Activity & Progress Report (PAPR); Non-SES Plan Activity & Progress Report (PAPR); SP Plan Activity & Progress Report (PAPR); Administrative Profile Report; eOPF Submission Status Report; and Performance Review Board (PRB) Report.**

Three reports exist in the USA Performance® Ratings App: **USAP Ratings – SES; USAP Ratings Non-SES; and USAP Ratings – SP.**

## II: SES Plan Activity & Progress Report Walkthrough

- [Overview](#)
- [Organization Progress](#)
- [Plans Ending Within 30 Days](#)
- [Filter by Plan Attributes](#)
- [Filter by Plan Holder](#)
- [Glossary](#)

# SES PAPR-Overview



## SES Plan Activity and Progress Report (PAPR)

This report offers insights into the progress of SES performance plans throughout the rating cycle, facilitating informed decision-making within USA Performance. It includes detailed information on plan end date, rating cycle phase, and individual plan for targeted analysis.

Through the products and services provided to agencies across government, the Office of Personnel Management - Human Resources Solutions, builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.

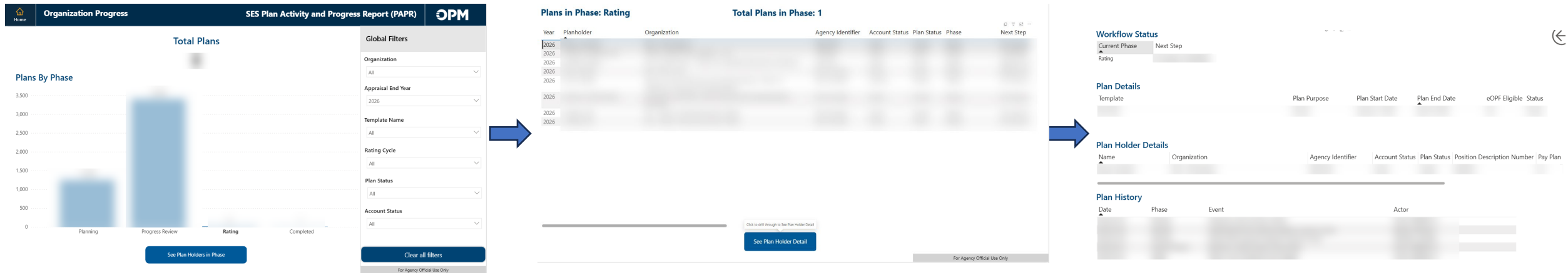


A welcome screen, custom tailored to what you can expect to see for the ensuing collection of PAPR SES Power BI reports.

There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the PAPR SES report on the left-hand navigation pane, this is the first page that shows on the screen.

# SES PAPR-Organization Progress



This initial report page displays a count of total active plans with a bar chart showing their distribution by phase (Planning, Progress Review, Rating, and Completed). The default Appraisal End Year is currently set to 2026.

By clicking on any of the vertical bar charts and then clicking on the “See Plan Holders in Phase” card below, allows you to drill down to see a list report, detailing that all the plan holders in that particular phase (in this example, the “Rating” Phase).

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Template Name, Rating Cycle, Plan Status, and Account Status.

# SES PAPR-Plans Ending in 30 Days

Home

Plans Ending Within 30 Days

SES Plan Activity and Progress Report (PAPR)

OPM

Plans Ending Within 30 Days

| Plan Start Date | Plan End Date | Days To Plan End | Plan Holder Name | Organization | Agency Identifier |
|-----------------|---------------|------------------|------------------|--------------|-------------------|
|                 |               |                  |                  |              |                   |

See Plan Holder Detail

Global Filters

Organization

All

Appraisal End Year

2026

Template Name

All

Rating Cycle

All

Plan Status

All

Account Status

All

Clear all filters

For Agency Official Use Only

Workflow Status

Current Phase

Next Step

Plan Details

| Template | Plan Purpose | Plan Start Date | Plan End Date | eOPF Eligible | Status |
|----------|--------------|-----------------|---------------|---------------|--------|
|          |              |                 |               |               |        |

Plan Holder Details

| Name | Organization | Agency Identifier | Account Status | Plan Status | Position Description Number | Pay Plan |
|------|--------------|-------------------|----------------|-------------|-----------------------------|----------|
|      |              |                   |                |             |                             |          |

Plan History

| Date | Phase | Event | Actor |
|------|-------|-------|-------|
|      |       |       |       |

This initial report page provides a list report that counts how many plans are set to end within the next 30 calendar days. The default setting for Appraisal End Year is 2026.

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Template Name, Rating Cycle, Plan Status and Account Status.

# SES PAPR-Filter by Plan Attributes

Home

Filter by Plan Attributes

SES Plan Activity and Progress Report (PAPR)

OPM

CURRENT EVENT

Search

Select all

Appointing Authority signs executive plan in rati...

Employee/executive signature applied in phase L...

Employee's plan has been created

In Progress Review Awaiting Signatures

Permanently delete plan

Rating Official signature applied in phase for plan.

Status of user evaluations had changed

Plan Attributes

Appraisal End Year

2026

Organization

All

Template Name

All

Pay Plan

All

Rating Cycle

All

Series

All

Plan Purpose

All

Pay Grade

All

Plan Status

All

Account Status

All

Clear all filters

Generate Report

For Agency Official Use Only

Plan Holders - By Attribute

Year

Organization

Plan Holder

Phase

Next Step

Plan Purpose

Rating Cycle Name

See Plan Holder Detail

Workflow Status

Current Phase

Next Step

Plan Details

Eval ID

Template

Plan Purpose

Cycle Start

Cycle End

eOFF Eligible

Plan Holder Details

Plan Holder

Organization

Position Description Number

Pay Plan

Grade

Series

Supervisory Status

Rating Cycle

Plan History

Date

Phase

Current Event

Next Step

Actor

Actor ID

This report page requires the selection of one or more filters to narrow down specific USA Performance® plan events and plan attributes, including Appraisal End Year (defaulted to 2026), Organization, Template Name, Pay Plan, Rating Cycle, Series, Plan Purpose, Pay Grade, Plan Status, and Account Status. You can also search by the “current event” of the plan along the left hand side (more than one plan events can be checked).

Results appear after clicking on the “Generate Report” icon at the bottom, which allows you to drill down to see a list report, detailing that all the plan holders based on your previous selection criteria.

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

# SES PAPR-Filter by Plan Holder

 Home

Filter by Plan Holder

SES Plan Activity and Progress Report (PAPR)



Plan Holder Attributes

Organization

All

Appraisal End Year

2026

Plan Status

All

Employee Name

All

Email

All

Account Status

All

Agency Identifier

All

Clear all filters

Generate Report



Workflow Status

Current Phase

Next Step

Plan Details

Template

Plan Purpose

Plan Start Date

Plan End Date

eOPF Eligible

Status

Planholder Details

Name

Organization

Agency Identifier

Account Status

Plan Status

Position Description Number

Pay Plan

Plan History

Date

Phase

Event

Actor

This initial report page allows for the filtering of Organization, Appraisal End Year, Plan Status, Employee Name, Email, Account Status and Agency Identifier, to narrow down specific USA Performance<sup>®</sup> plan details. Results appear after clicking on the “Generate Report” icon at the bottom.

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

The Glossary report page is found at the end of every report and contains the fields included in each USA Performance<sup>®</sup> report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

# III: SP Plan Activity & Progress Report Walkthrough

- [Overview](#)
- [Organization Progress](#)
- [Plans Ending Within 30 Days](#)
- [Employee Plan Lookup](#)
- [Glossary](#)

# SP PAPR: Overview



Manage Performance, Ensure Success

## SP Plan Activity and Progress Report (PAPR)

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This report offers insights into the progress of SP performance plans throughout the performance year and facilitates informed decision-making within USA Performance. It includes detailed information on individual plans and organizational progress for targeted analysis.

Through the products and services provided to agencies across government, the Office of Personnel Management, Human Resources Solutions builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.



Developed by the Office of Personnel Management,  
USA Performance Team

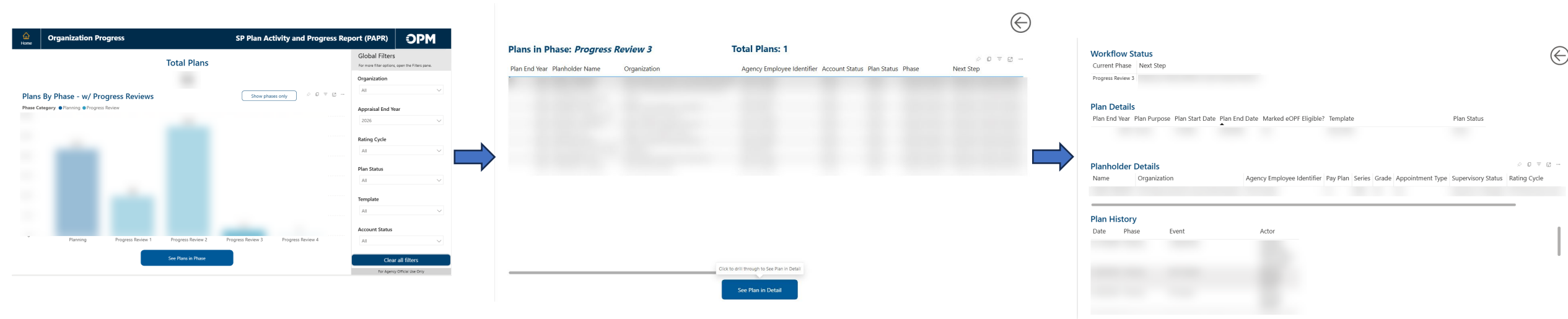
For questions contact [USAPHelp@opm.gov](mailto:USAPHelp@opm.gov)

A welcome screen, custom tailored to what you can expect to see for the ensuing collection of SP PAPR Power BI reports.

There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the SP PAPR report on the left-hand navigation pane, this is the first page that shows on the screen.

# SP PAPR: Organization Progress



This initial report page displays a count of total active plans with a bar chart showing their distribution by phase (Planning, Progress Review, Rating, and Completed). The default Appraisal End Year is currently set to 2026.

By clicking on any of the vertical bar charts and then clicking on the “See Plan Holders in Phase” card below, allows you to drill down to see a list report, detailing that all the plan holders in that particular phase (in this example, the “Rating” Phase).

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Rating Cycle, Plan Status, Template and Account Status.

# SP PAPER: Plans Ending within 30 Days

Home
Plans Ending within 30 days
SP Plan Activity and Progress Report (PAPR)
OPM

## Plans Ending Within 30 Days

| Plan End Year | Plan Start Date | Plan End Date | Days til End Date | Name | Organization | Agency |
|---------------|-----------------|---------------|-------------------|------|--------------|--------|
|               |                 |               |                   |      |              |        |

See Plan in Detail

### Global Filters

For more filter options, open the Filters pane.

**Organization**

All

**Appraisal End Year**

2026

**Rating Cycle**

All

**Plan Status**

All

**Template**

All

**Account Status**

All

Clear all filters

For Agency Official Use Only



Workflow Status
Current Phase
Next Step
Planning
Progress Review 1

### Plan Details

| Plan End Year | Plan Purpose | Plan Start Date | Plan End Date | Marked eOPF Eligible? | Template | Plan Status |
|---------------|--------------|-----------------|---------------|-----------------------|----------|-------------|
| 2026          | Annual       |                 |               |                       |          | Closed      |
| 2026          | Annual       |                 |               |                       |          | Active      |

### Planholder Details

| Name | Organization | Agency Employee Identifier | Pay Plan | Series | Grade | Appointment Type | Supervisory Status | R |
|------|--------------|----------------------------|----------|--------|-------|------------------|--------------------|---|
|      |              |                            |          |        |       |                  |                    |   |

### Plan History

| Date | Phase | Event | Actor |
|------|-------|-------|-------|
|      |       |       |       |

This initial report page provides a list report that counts how many plans are set to end within the next 30 calendar days. The default setting for Appraisal End Year is 2026.

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Rating Cycle, Plan Status, Template and Account Status.

# SP PAPR: Employee Plan Lookup

Home

Employee Plan Lookup

SP Plan Activity and Progress Report (PAPR)

OPM

Employee Name

Agency Identifier

Appraisal End Year

All

2026

Plan Details

Plan Status

Active

Plan Purpose

Annual

Start Date

End Date

Workflow Status

Date

Current Phase

Next Step

Employee Details from Plan

| Organization | Pay Plan | Series | Grade | Supervisory Status | Rating Cycle | Account Status |
|--------------|----------|--------|-------|--------------------|--------------|----------------|
|              |          |        |       |                    |              |                |

Plan History

| Date | Phase | Event | Actor |
|------|-------|-------|-------|
|      |       |       |       |

Global Filters

For more filter options, open the Filters pane.

Organization

All

Plan Purpose

All

Rating Cycle

All

Plan Status

All

Template

All

Account Status

All

Clear all filters

For Agency Official Use Only

This report page shows details of Senior Professional (SP) Plans. You can search by Employee Name or Agency Identifier at the top. The default setting for Appraisal End Year is 2026.

The Plan detail information includes the following information for SP: Plan Details (Plan Status, Plan Purpose, Start and End dates), Workflow Status (Date, Current Phase and Next step), Employee Details from Plan (Organization, Pay Plan, Series, Grade, Supervisory Status, Rating Cycle and Account Status), and Plan History (Date, Phase, Event, and Actor).

The Filters on this page include:  
Organization, Plan Purpose, Rating Cycle, Plan Status, Template and Account Status

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

## IV: Non-SES Plan Activity & Progress Report Walkthrough

- [Overview](#)
- [Organization Progress](#)
- [Plans Ending Within 30 Days](#)
- [Filter by Plan Attributes](#)
- [Filter by Plan Holder](#)
- [Glossary](#)

# Non-SES/SP PAPR-Overview

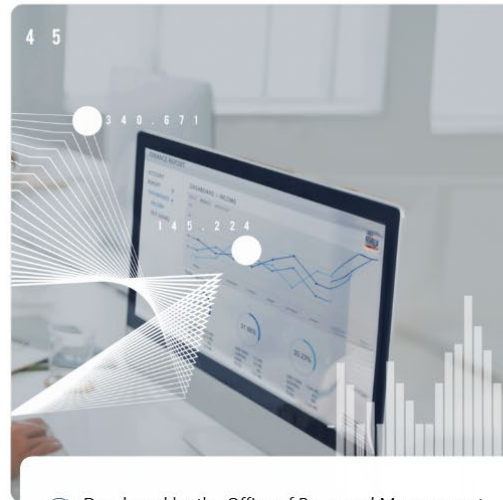
**USA Performance**  
Manage Performance, Ensure Success

## Non-SES/SP Plan Activity and Progress Report (PAPR)

This report offers insights into the progress of non-SES/SP performance plans throughout the rating cycle, facilitating informed decision-making within USA Performance. It includes detailed information on plan end date, rating cycle phase, and individual plans for targeted analysis.

Through the products and services provided to agencies across government, the Office of Personnel Management - Human Resources Solutions, builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.



Developed by the Office of Personnel Management,  
USA Performance Team

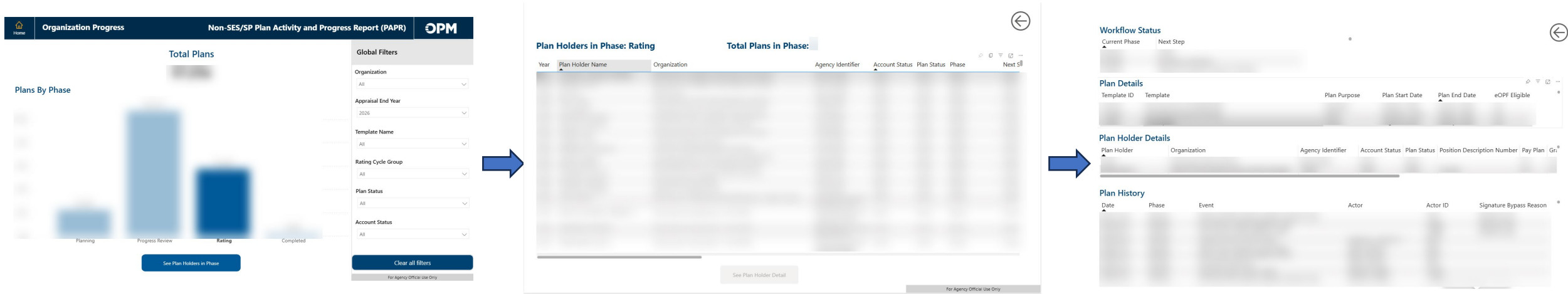


For questions contact [USAPHelp@opm.gov](mailto:USAPHelp@opm.gov)

A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Non-SES/SP PAPR Power BI reports. There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the Non-SES/SP PAPR report on the left-hand navigation pane, this is the first page that shows on the screen.

# Non-SES/SP PAPR-Organization Progress



This initial report page displays a count of total active plans with a bar chart showing their distribution by phase (Planning, Progress Review, Rating, and Completed).

By clicking on any of the vertical bar charts and then clicking on the “See Plan Holders in Phase” card below, allows you to drill down to see a list report, detailing that all the plan holders in that particular phase (in this example, the “Rating” Phase).

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Template Name, Rating Cycle Group, Plan Status, and Account Status.

# Non-SES/SP PAPR-Plans Ending in 30 Days

Plans Ending Within 30 Days

Non-SES/SP Plan Activity and Progress Report (PAPR) OPM

Plans Ending Within 30 Days

1

| Plan Start Date | Plan End Date | Days To Plan End | Plan Holder Name | Organization |
|-----------------|---------------|------------------|------------------|--------------|
|                 |               |                  |                  |              |

See Plan Holder Detail

Global Filters

Organization: All

Appraisal End Year: 2026

Template Name: All

Rating Cycle Group: All

Plan Status: All

Account Status: All

Clear all filters

For Agency Official Use Only



Workflow Status

Current Phase: Next Step

Plan Details

| Template ID | Template | Plan Purpose | Plan Start Date | Plan End Date | eOPF Eligible |
|-------------|----------|--------------|-----------------|---------------|---------------|
|             |          |              |                 |               |               |

Plan Holder Details

| Plan Holder | Organization | Agency Identifier | Account Status | Plan Status | Position Description Number | Pay Plan | Gr |
|-------------|--------------|-------------------|----------------|-------------|-----------------------------|----------|----|
|             |              |                   |                |             |                             |          |    |

Plan History

| Date | Phase | Event | Actor | Actor ID | Signature Bypass Reason |
|------|-------|-------|-------|----------|-------------------------|
|      |       |       |       |          |                         |

This initial report page provides a list report that counts how many plans are set to end within the next 30 calendar days.

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

The Global Filters on this page include Organization, Appraisal End Year, Template Name, Rating Cycle Group, Plan Status and Account Status.

# Non-SES/SP PAPR-Filter by Plan Attributes

The first screenshot shows the 'Filter by Plan Attributes' page. It includes a search bar, a list of filters (e.g., Appraisal End Year, Organization, Template Name, Pay Plan, Rating Cycle Group, Pay Grade, Bypassed Signatures, Series, Plan Purpose, Plan Status, Account Status), and buttons for 'Clear all filters' and 'Generate Report'.

The second screenshot shows the 'Plan Holders - by Attribute' list report. It displays a table with columns for Year, Plan Holder, Organization, Agency Identifier, Account Status, Plan Status, Phase, and Next Step. A 'See Plan Holder Detail' button is visible at the bottom.

The third screenshot shows the 'Plan Holder Details' page. It includes sections for 'Workflow Status', 'Plan Details' (Template ID, Template, Plan Purpose, Plan Start Date, Plan End Date, eOPF Eligible), 'Plan Holder Details' (Plan Holder, Organization, Agency Identifier, Account Status, Plan Status, Position Description Number, Pay Plan, Grade), and 'Plan History' (Date, Phase, Event, Actor, Actor ID, Signature Bypass Reason).

This report page requires the selection of one or more filters to narrow down specific USA Performance® plan events and plan attributes, including Appraisal End Year, Organization, Template Name, Pay Plan, Rating Cycle Group, Pay Grade, Bypassed Signatures, Series, Plan Purpose, Pay Grade, Plan Status and Account Status.

Results appear after clicking on the “Generate Report” icon at the bottom, which allows you to drill down to see a list report, detailing that all the plan holders based on your previous selection criteria.

By clicking on one of these plan holders in this list report and then clicking on the “See Plan Holder Detail” card below, allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

# Non-SES/SP PAPR-Filter by Plan Holder

Home

Filter by Plan Holder

Non-SES/SP Plan Activity and Progress Report (PAPR)

OPM

## Plan Holder Attributes

Organization

All

Appraisal End Year

2026

Plan Status

All

Plan Holder

All

Plan Holder Email

All

Account Status

All

Agency Identifier

All

Clear all filters

Generate Report

For Agency Official Use Only



Workflow Status

Current Phase

Next Step

Plan Details

Template ID

Template

Plan Purpose

Plan Start Date

Plan End Date

eOPF Eligible

Plan Holder Details

Plan Holder

Organization

Agency Identifier

Account Status

Plan Status

Position Description Number

Pay Plan

Gr.

Plan History

Date

Phase

Event

Actor

Actor ID

Signature Bypass Reason

This initial report page allows for the filtering of Organization, Appraisal End Year, Plan Status, Plan Holder, Plan Holder Email, Account Status and Agency Identifier, to narrow down specific USA Performance® plan details. Results appear after clicking on the “Generate Report” icon at the bottom, which allows you to see more detail, such as the plan holder’s next step, rating cycle, plan cycle start and end dates, and the entire plan history action items.

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

# V: Administrative Report Walkthrough

- [Overview](#)
- [User Profile](#)
- [User Role Distribution](#)
- [Profile Lockout](#)
- [2-Week Lockout Warning](#)
- [SSN or Agency ID Missing](#)
- [Template/Rating Cycle Needed](#)
- [RO and RevO - Assignments Needed](#)
- [Glossary](#)

# Administrative Profile Report-Overview



## Administrative Profile Report

This report delivers valuable insights into role distribution within USA Performance, highlighting areas for action. It includes detailed information on User Status, identifies Inactive Accounts, and flags Blank SSNs, enabling targeted interventions and improved data management.

Through the products and services provided to agencies across government, the Office of Personnel Management - Human Resources Solutions, builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.

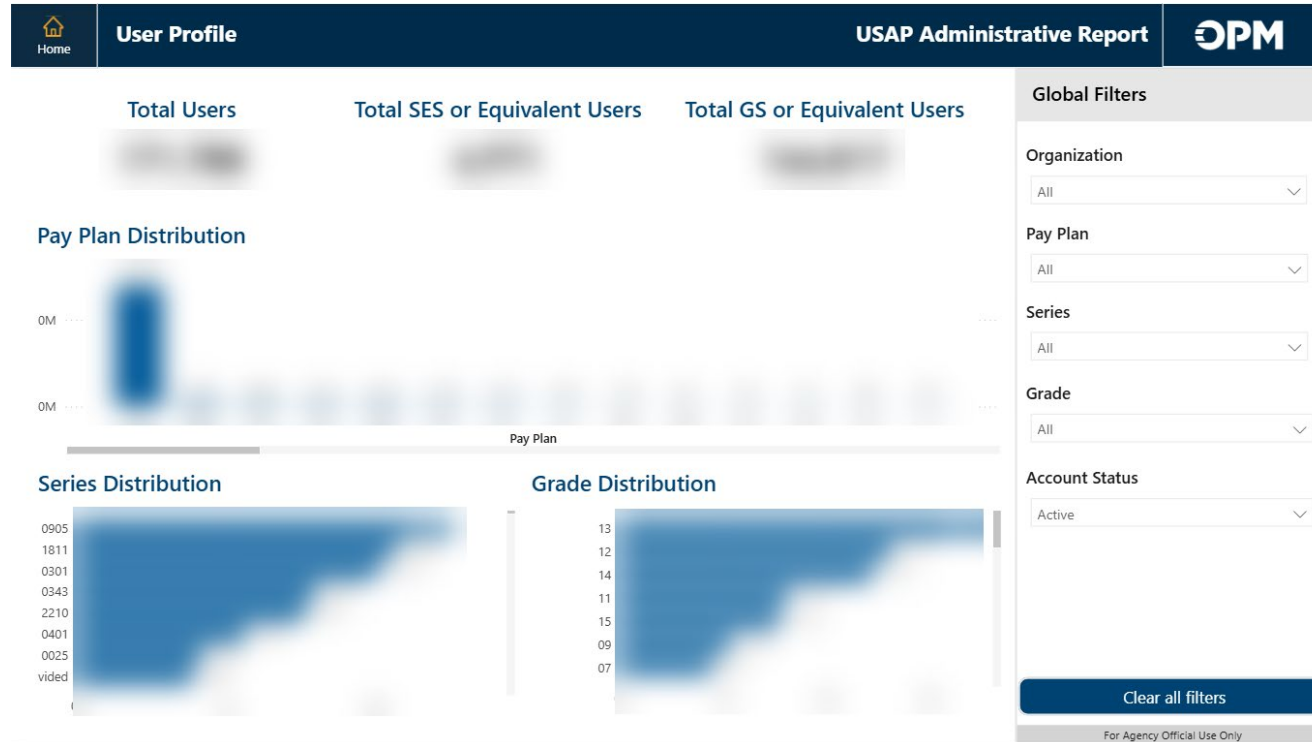


A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Administrative Power BI reports.

There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the Administrative report on the left-hand navigation pane, this is the first page that shows on the screen.

# Administrative Profile Report-User Profile

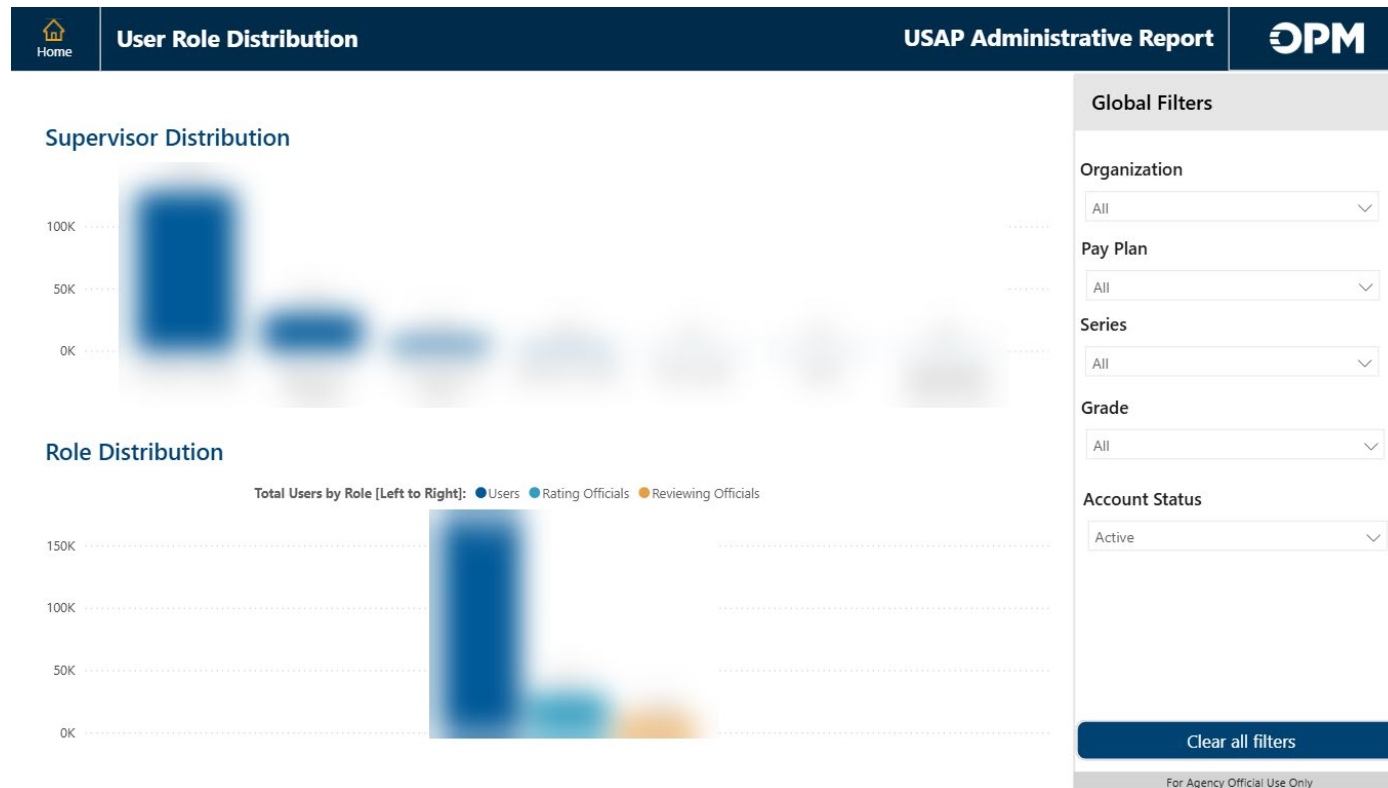


This report page contains metrics on total active users, including SES (or equivalent) and GS (or equivalent) users, followed by bar chart distribution metrics by pay plan, series and grade. This report page gives you a quick overview of the your organization by these key metrics.

The default filter is on Active Account Status. Pay Plan, Series and Grade charts are sorted by descending counts.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

# Administrative Profile Report-Role Distribution



This report page provides metrics related to user roles. The top visualization shows a breakdown by supervisory role. The default filter is set to Active Account Status.

The bottom visualization indicates whether an employee is designated as an end user, a rating official (RO) or reviewing official (RevO). Note that everyone in USA Performance<sup>®</sup> is at least a user, and most employees in managerial positions can be a combination of user and RO, user and RevO, or all three.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

# Administrative Profile Report-Profile Lockout

The image displays two versions of the OPM Profile Lockout report interface, connected by a double-headed arrow, illustrating the toggle between different filter views.

**Left Screenshot:** The 'Accounts Locked' filter card is selected. The report title is 'Accounts Locked and Users Never Logged In'. The table below shows a list of users with columns for Name, Email, Organization, and Agency Identifier. The sidebar on the right contains filters for Organization, Pay Plan, Series, Grade, and Account Status, all set to 'All'.

**Right Screenshot:** The 'Users Never Logged In' filter card is selected. The report title is 'Accounts Locked and Users Never Logged In'. The table below shows a list of users with columns for Name, Email, Organization, and Agency Identifier. The sidebar on the right contains filters for Organization, Pay Plan, Series, Grade, and Account Status, all set to 'All'.

This report page displays the number of users locked out (based on not having logged into USA Performance® in the past 200 calendar days) and those who have never logged into USA Performance® at all, with a list report at the bottom. The default filter is set to Active Account Status.

Toggle between “Accounts Locked” and “Users Never Logged In” by left-clicking on the filter card towards the top of the report page.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

# Administrative Profile Report-2 Week Lockout Warning

This report page shows USA Performance® admins and users within 14 calendar days of being locked out from the USA Performance® application. The default filter is set to Active Account Status.

Toggle between “USAP Users” and “USAP Admins” by left-clicking on the filter card towards the top of the report page.

Note that users are locked out after 200 calendar days of inactivity in USA Performance®, admins are locked out after 90 days.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

Home

USAP Administrative Report

OPM

SSN or Agency Identifier Missing

Missing SSNs

Missing Agency IDs

Users with SSNs Missing

Global Filters

Organization

All

Pay Plan

All

Series

All

Grade

All

Account Status

Active

Clear all filters

Note: Users w/ ZZ pay plans are excluded

For Agency Official Use Only

Name

Email

Organization

Agency Identifier



Home

SSN or Agency Identifier Missing

USAP Administrative Report

OPM

Users With Missing SSNs or Missing Agency IDs

Missing SSNs

Missing Agency IDs

Agency Identifiers Missing

| Name              | Email | Organization | Agency Identifier |
|-------------------|-------|--------------|-------------------|
| [Blurred content] |       |              |                   |

Global Filters

Organization

All

Pay Plan

All

Series

All

Grade

All

Account Status

Active

Clear all filters

Note: Users w/ ZZ pay plans are excluded

For Agency Official Use Only

This report page displays a count of users with missing an SSN or Agency Identifier in the USA Performance® application, as well as the accompanying list report. The default filter is set for Active Account Status.

Toggle between “Missing SSNs” and “Missing Agency IDs” by left-clicking on the filter card towards the top of the report page.

Note that Users with a pay plan of “ZZ” (Non-Rated) are excluded from this report page, since they are exempt from having an SSN or Agency ID in the system.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

# Administrative Profile Report-Template/Rating Cycle Needed

The image displays two screenshots of the 'Administrative Profile Report-Template/Rating Cycle Needed' page, connected by a double-headed arrow. The left screenshot shows the 'Rating Cycle Needed' filter selected, with the text 'Rating Cycle Not Assigned' below it. The right screenshot shows the 'Evaluation Template Needed' filter selected, with the text 'Evaluation Template Not Assigned' below it. Both screenshots show a table with columns: Name, Email, Organization, Agency Identifier, and Account Status. A sidebar on the right contains 'Global Filters' for Organization, Pay Plan, Series, Grade, and Account Status, all set to 'All'. A 'Clear all filters' button is at the bottom of the sidebar. A note at the bottom states: 'Note: Users w/ ZZ pay plans are excluded'.

This report page displays a count of users with missing Rating Cycle or Evaluation Template in the USA Performance<sup>®</sup> application, as well as the accompanying list report. The default filter setting is on Active Account Status.

Toggle between “Rating Cycle Needed” and “Evaluation Template Needed” by left-clicking on the filter card towards the top of the report page.

Note that Users with a pay plan of “ZZ” (Non-Rated) are excluded from this report page, since they are exempt from having a Rating Cycle or Evaluation Template in the system.

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

Home

**RO and RevO - Assignments Needed**

**USAP Administrative Report**

### Rating and Reviewing Officials - Not Assigned or Deactivated Assignments

RO/RevO Not Assigned

Deactivated Users as RO/RevO

Users Without Rating or Reviewing Official Assigned

| Name              | Email | Organization | Agency Identifier |
|-------------------|-------|--------------|-------------------|
| [Blurred content] |       |              |                   |

Global Filters

Organization

All

Pay Plan

All

Series

All

Grade

All

Account Status

Active

Clear all filters

Note: Users w/ ZZ pay plans are excluded

For Agency Official Use Only



 Home

Deactivated Users as RO/RevO

USAP Administrative Report

OPM

### Rating and Reviewing Officials - Not Assigned or Deactivated Assignments

RO/RevO Not Assigned

Deactivated Users as RO/RevO

Deactivated Rating/Reviewing Officials - Assigned to Active Users

| RO/RevO Name      | Account Status | Email | Organization |
|-------------------|----------------|-------|--------------|
| [Blurred content] |                |       |              |

Global Filters

Organization

All

Pay Plan

All

Series

All

Grade

All

Clear all filters

For Agency Official Use Only

This report page shows a count of users without a Rating Official (RO) or Reviewing Official (RevO) assigned in the USA Performance® application, and then Deactivated users who are either an RO or RevO, as well as their respective list report below. The default filter setting is on Active Account Status (only applicable to the “RO/RevO Not Assigned” toggle, as “Deactivated Users” are not active by definition).

Toggle between “RO/RevO Not Assigned” and “Deactivated Users as RO/RevO” by left-clicking on the buttons towards the top of the report page.

Note that Users with a pay plan of “ZZ” (Non-Rated) are excluded from this report page (applicable to the RO/RevO Not Assigned filter only).

The filters available on this report page are Organization, Pay Plan, Series, Grade and Account Status.

# Glossary

Home

Glossary of Terms Used Across Power BI Reports

OPM

Keyword Filter on Field

▼ Enter Field →

Keyword Filter on Definition

▼ Enter Definition →

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

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You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

# VI: eOPF Report Walkthrough

- [Overview](#)
- [eOPF Submissions Overview](#)
- [Ready for eOPF Transfer](#)
- [eOPF Submission Status](#)
- [eOPF Errors Received](#)
- [Glossary](#)

# eOPF Submission Status Report-Overview

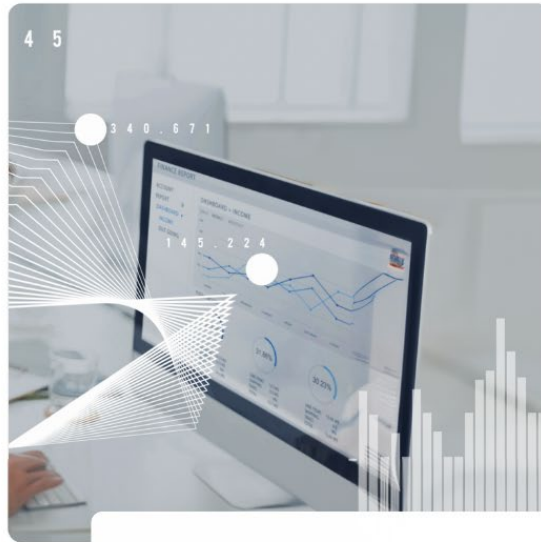


## eOPF Submission Status Report

This report tracks the status of SES and non-SES/SP plans in relation to their transmission to eOPF. It identifies plans that are ready for transmission, those successfully transmitted, and any that encountered errors during the process.

Through the products and services provided to agencies across government, the Office of Personnel Management - Human Resources Solutions, builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.



Developed by the Office of Personnel Management,  
USA Performance Team.

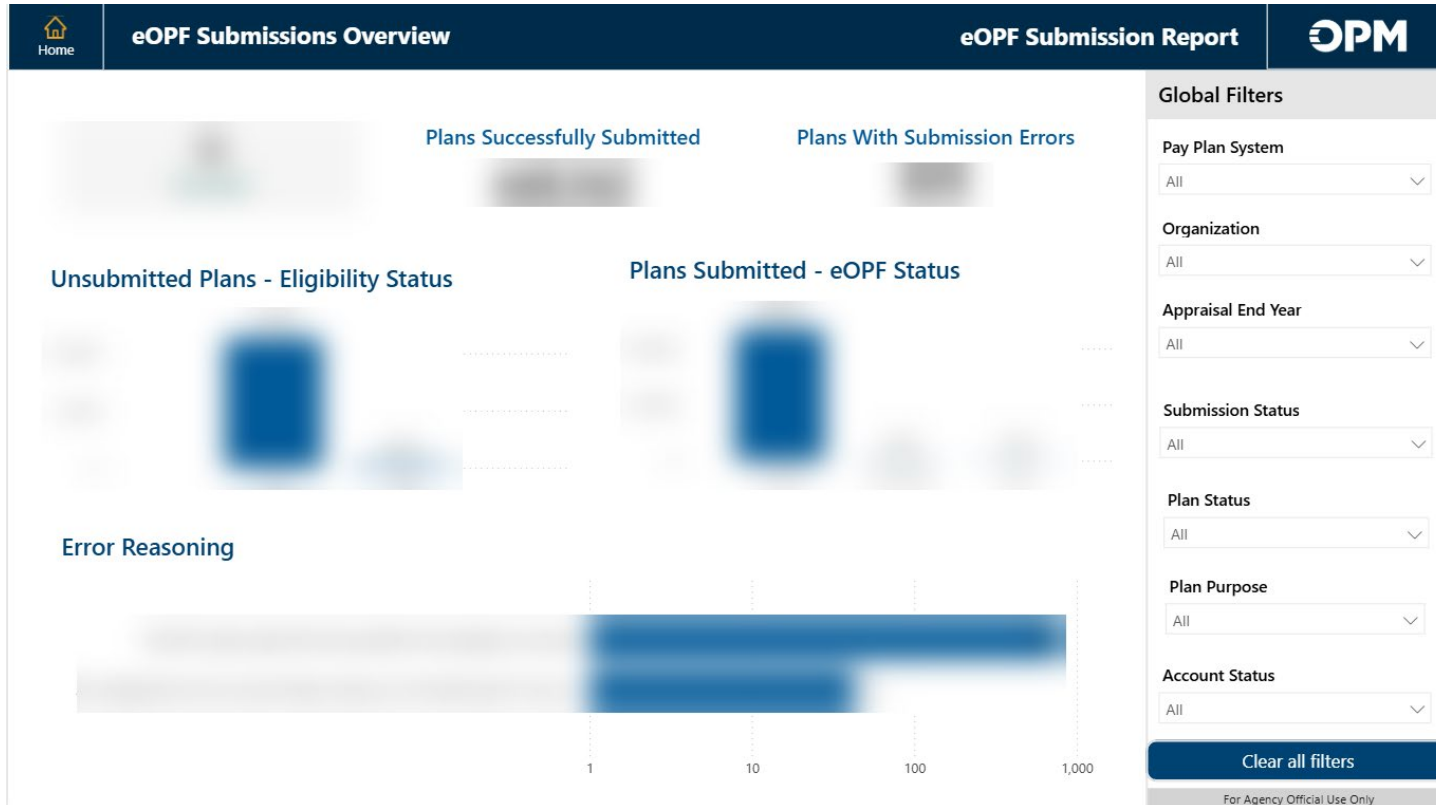
For questions, contact [USAPHelp@opm.gov](mailto:USAPHelp@opm.gov)

A welcome screen, custom tailored to what you can expect to see for the ensuing collection of eOPF Power BI reports.

There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the eOPF report on the left-hand navigation pane, this is the first page that shows on the screen.

# eOPF Submission Report-eOPF Submissions Overview



This report page gives a count of eligible unsubmitted plans, plans successfully submitted and plans with submission errors.

The first visualization (“Eligible Plans”) shows the number of plans that are eligible to be submitted to eOPF. The second, titled “Plans Successfully Submitted” shows the number of successfully submitted plans. The “Plans with Submission Errors” metric shows the number of plans that still have an error after submitting to eOPF. The “Unsubmitted Plans-Eligibility Status” is separated into two groups: Yes (the number of plans that have yet to be submitted to eOPF and are eligible) and No (the number of plans that have yet to be submitted to eOPF *because* they are not eligible, for whatever reason). The “Plans Submitted-eOPF Status” indicates whether or not a submitted plans was successful, in error, or in process.

Finally, the “Error Reasoning” visualization breaks out in more detail what the error reasons are for those plans that were submitted.

The Filters on this page include: Pay Plan System, Organization, Appraisal End Year, Submission Status, Plan Status, Plan Purpose, and Account Status

# eOPF Submission Report-Ready for eOPF Submission

 Home

Ready for eOPF Submission

eOPF Submission Report



Plans Marked as Ready for Submission

Plan End Year

Name

Agency Identifier

Organization

Email

Pay Plan

Start

Global Filters

Pay Plan System

All

Organization

All

Appraisal End Year

All

Submission Status

All

Plan Status

All

Plan Purpose

All

Planholder Email

All

Planholder Name

All

Account Status

All

Clear all filters

For Agency Official Use Only

This report page provides a list report with detailed information about plans that are ready for eOPF submission. Note that these plans must have not already been submitted for the current year.

The Filters on this page include: Pay Plan System, Organization, Appraisal End Year, Submission Status, Plan Status, Plan Purpose, Planholder Email, Planholder Name, and Account Status

# eOPF Submission Report-eOPF Submission Status

**eOPF Submission Status**

Plan End Year Name Agency Identifier Email Submission Date Organization

**Global Filters**

Pay Plan System  
All

Organization  
All

Appraisal End Year  
All

Submission Status  
All

Plan Status  
All

Plan Purpose  
All

Planholder Email  
All

Planholder Name  
All

Account Status  
All

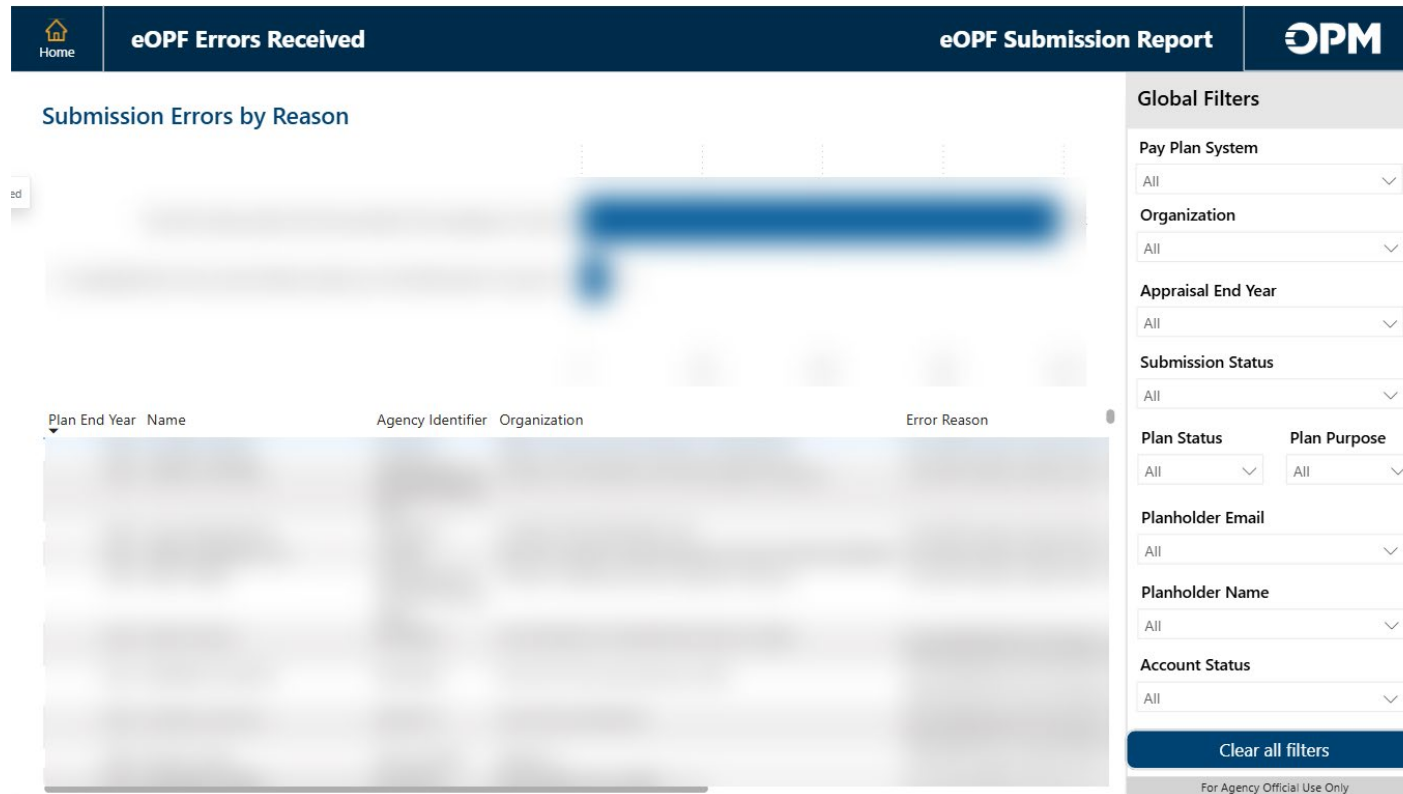
Clear all filters

For Agency Official Use Only

This report page provides a list report, detailing the submission status for plan holders, along with the corresponding error (if any), processed date and who the plan was submitted by.

The Filters on this page include: Pay Plan System, Organization, Appraisal End Year, Submission Status, Plan Status, Plan Purpose, Planholder Email, Planholder Name, and Account Status

# eOPF Submission Report-eOPF Errors Received



This report page provides a count of reasons why a plan submission returned an error, in a horizontal bar chart at the top.

The Excel-style, tabular list report at the bottom provides details (such as Plan ID, Name, Email and Organization) for those plan holders as well as their error reason.

The Filters on this page include: Pay Plan System, Organization, Appraisal End Year, Submission Status, Plan Status, Plan Purpose, Planholder Email, Planholder Name, and Account Status

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

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You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

## VII: Performance Review Board (PRB) Report Walkthrough

- [Overview](#)
- [Review Board Summary](#)
- [Board Composition and Assignments](#)
- [Glossary](#)

# Performance Review Board Report-Overview



## Performance Review Board (PRB) Report

This report provides insight into the current PRB Groups within USA Performance, detailing the chairs, members, and their assigned workloads.

Through the products and services provided to agencies across government, the Office of Personnel Management - Human Resources Solutions, builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

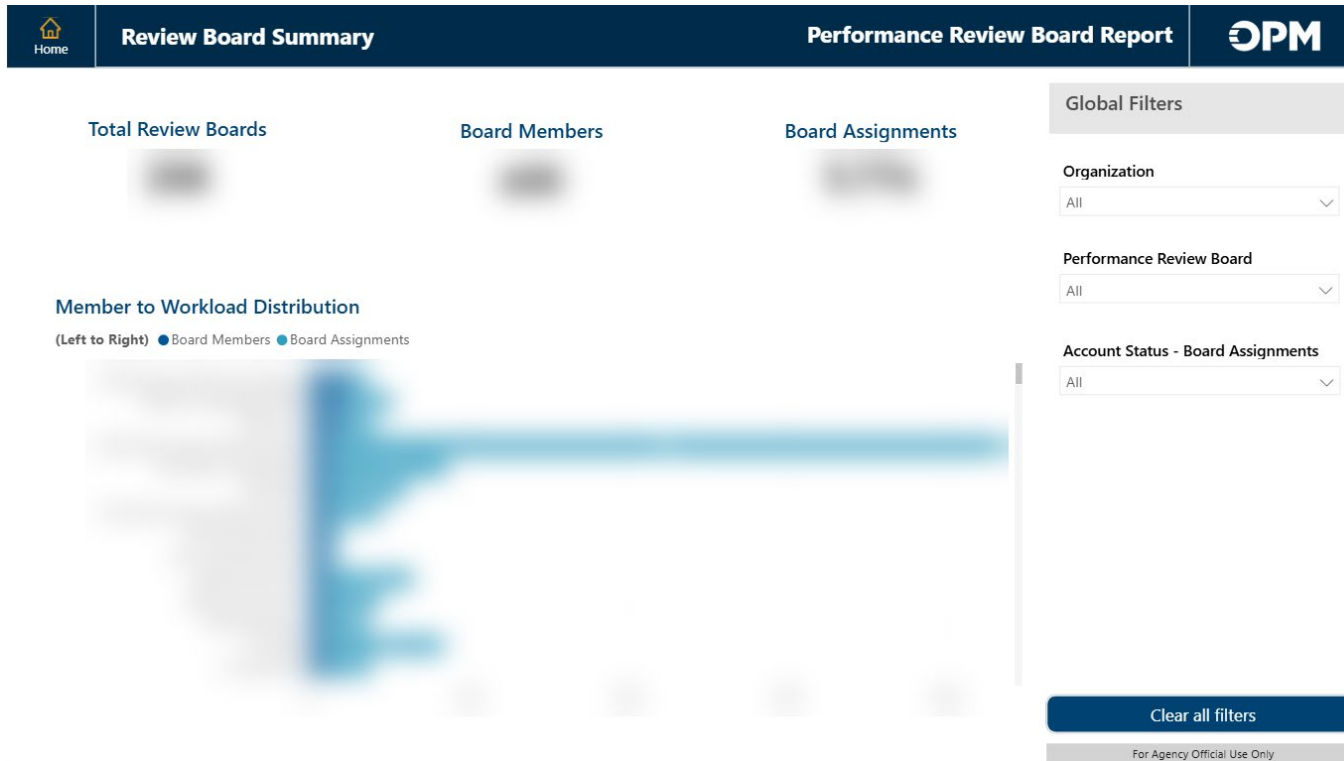
The information included in this dashboard is approved **for official use only**.



A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Performance Review Board Power BI reports. There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the Performance Review Board report on the left-hand navigation pane, this is the first page that shows on the screen.

# PRB Report-Review Board Summary



This report page shows the count of total review boards, board members and board assignments (i.e. how many plan holders are assigned to be evaluated by the Performance Review Board).

The horizontal stacked bar chart visualization at the bottom provides details regarding how many board members and board assignments comprise each Performance Review Board group.

The filters on this page include Organization, Performance Review Board, and Account Status-Board Assignments.

# PRB Report-Board Composition and Assignments



This initial report page displays a list report of the Performance Review Board Chairs and a list report of Performance Review Board members. On the “Board Composition” page, you can also see who the Board Chairs for your organization are.

Performance Review Board members are part of one or more Performance Review Boards. Their main duty is to help assign a rating for other SES and SP employees. On the “Board Composition” page, you can see who these board members are in your organization, and which PR Board group they belong to.

By clicking on the “Board Assignments” card above, provides a list report of the Performance Review Board Assignments (i.e. plan holders are assigned to be evaluated by the Performance Review Board members). On the “Board Assignments” page, you can see how many SES and SP employees are assigned to be rated for each PR Board or PRB member.

The filters on this page include Organization, Performance Review Board and Account Status – Board Assignments.

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPR.                                                                                                                                                                                                                                                                                                                                                                                         |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

## VIII: USAP Ratings - Non-SES Report Walkthrough

- [Overview](#)
- [Summary Ratings](#)
- [Element Ratings](#)
- [Employee Plan Lookup](#)
- [All Ratings](#)
- [Glossary](#)

# Non-SES/SP Performance Ratings Report-Overview



## Non-SES/SP Performance Ratings Report

This report provides an overview of summary and element ratings for non-SES/SP employees, detailing ratings across different Rating Levels and Organizational hierarchies. It also includes individual records for each plan holder, enabling detailed analysis of their specific ratings.

Through the products and services provided to agencies across government, the Office of Personnel Management, Human Resources Solutions builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

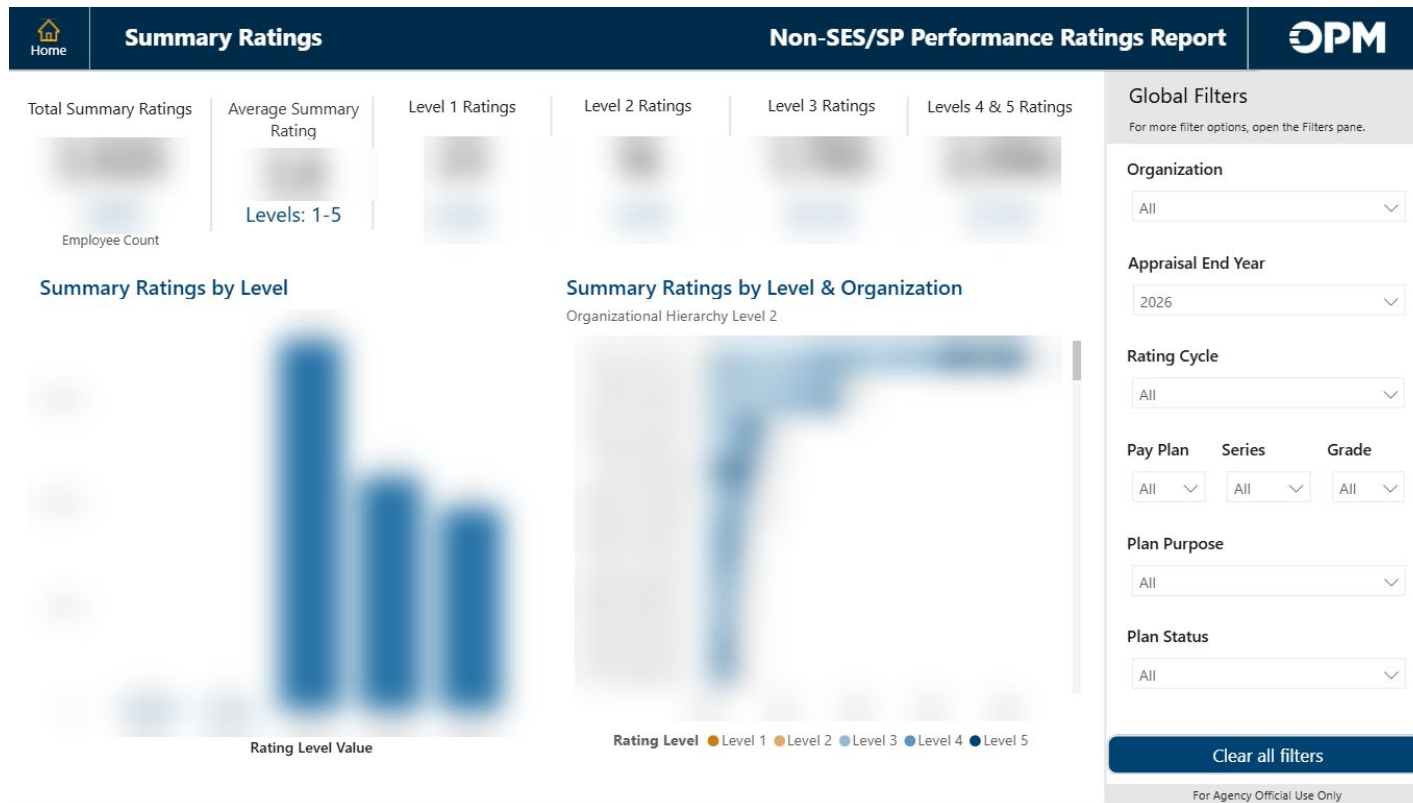
The information included in this dashboard is approved **for official use only**.



A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Performance Review Board Power BI reports. There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the Non-SES/SP Performance Ratings report on the left-hand navigation pane, this is the first page that shows on the screen.

# Non-SES/SP Performance Ratings Report-Summary Ratings



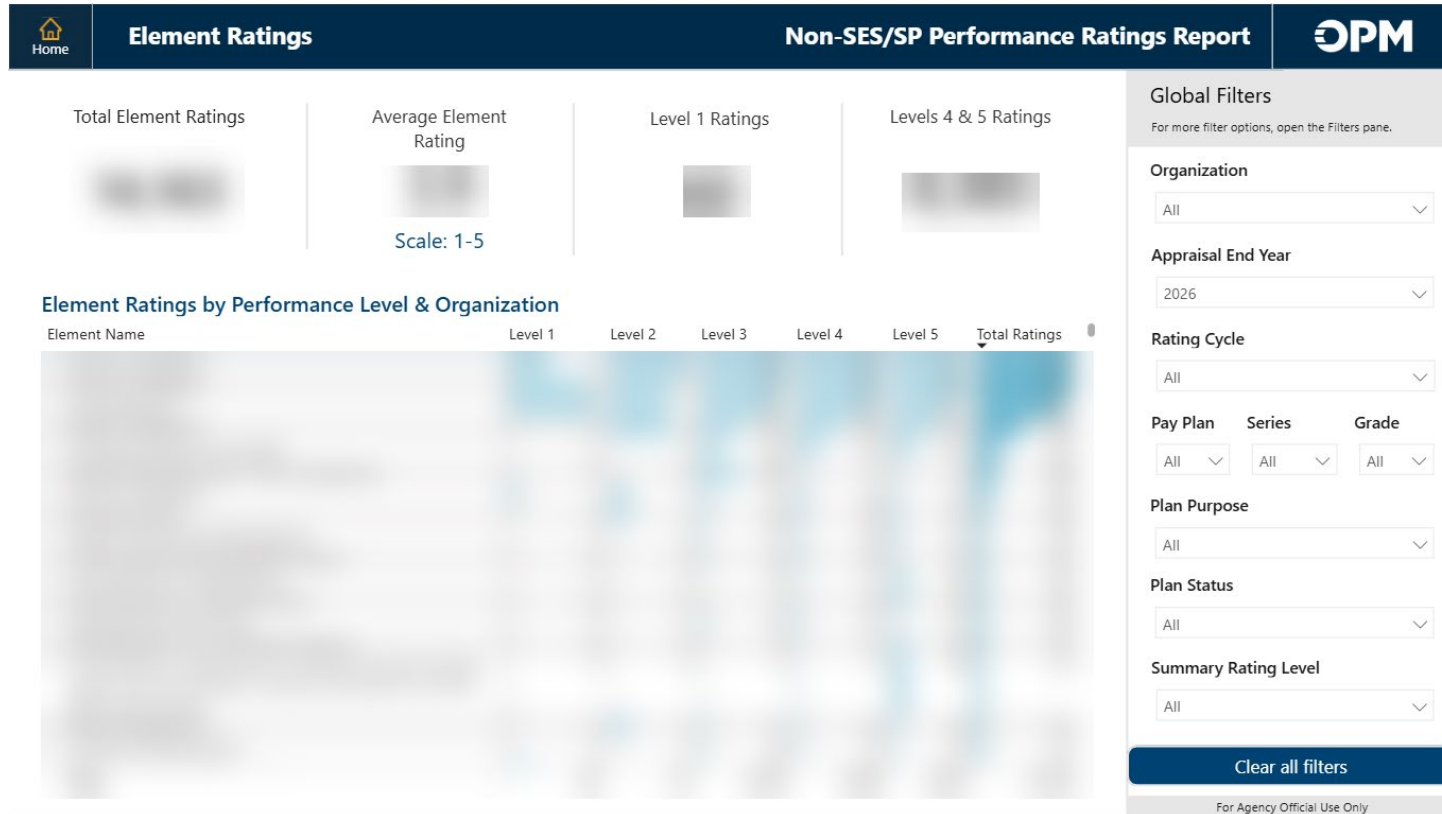
This report page provides a snapshot of Total Summary Ratings, Average Summary Rating, and the counts of non-SES/SP with Rating scores at each rating level across the top, and their corresponding percentage of the population. The default Appraisal End Year filter is 2026.

The lower left bar graph shows the Summary Ratings Distribution by each Rating Level.

The lower right bar graph shows the Summary Ratings by Level and 2<sup>nd</sup> level organization (that is, one organizational level down from the parent agency. For example, most agencies' CFO office is the 2nd level organization).

The Filters on this page include Organization, Appraisal End Year, Rating Cycle, Pay Plan, Series, Grade, Plan Purpose, Plan Status

# Non-SES/SP Performance Ratings Report-Element Ratings



This report page shows the number of Total Element Ratings, Average Element Rating, count of Level 1 Element ratings and the count of Level 4 & 5 Element ratings. The default Appraisal End Year filter is 2026.

The main visualization breaks down the count of Element Names by their level values (i.e. 1-5), and the total number of ratings. Each of the element names can be expanded (by clicking the “+” sign next to each one) to see how the 2<sup>nd</sup> level organizations fared for each element name.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Series, Grade, Plan Purpose, Plan Status, Summary Rating Level

# Non-SES/SP Performance Ratings-Employee Plan Lookup

Home
 **Employee Plan Lookup**

**Non-SES/SP Performance Ratings Report**

Employee Name

Hide Agency ID

Appraisal End Year

2021

2022

2023

2024

2025

2026

Agency Identifier

All

**Rating Details**

Summary Rating Value

Element Ratings

| Element Name | Rating | Weight |
|--------------|--------|--------|
|              |        |        |

Rating Cycle

**Plan Details**

Plan Status

Current Rating Official

Current Reviewing Official

**Employment Information**

Organization

Position Title

Series

Grade

**Global Filters**

For more filter options, open the Filters pane.

Organization

All

Rating Cycle

All

Pay Plan

All

Series

All

Grade

All

Plan Purpose

All

Plan Status

All

Summary Rating Level

All

Clear all filters

For Agency Official Use Only

This report page shows details of employee Plan Ratings. An employee's plan rating detailed information can be searched using the drop down menu (one at a time) at the top, under Employee Name. You can also search by Agency Identifier, if known. The Appraisal Year can be toggled at the top of the page and is defaulted to 2026.

The middle of page contains various plan rating metrics, such as summary rating values, individual element rating values (and their weights), the rating cycle this plan rating was on, what the current plan status is, who the current Rating and Reviewing Officials are, which organization the employee works in, along with their title, series and grade.

The Filters on this page include: Organization, Rating Cycle, Pay Plan, Series, Grade, Plan Purpose, Plan Status, and Summary Rating Level

# Non-SES/SP Performance Ratings Report-All Ratings

Home

All Ratings

Non-SES/SP Performance Ratings Report

OPM

Employee Name

Rating Official\*

Reviewing Official\*

Agency Identifier

All

All

All

All

Select a Rating Tier:

Summary

Element

Both

All Ratings - Summary

| Appraisal End Year | Plan Purpose | Employee Name | Agency Identifier | Summary Rating Level | Organization |
|--------------------|--------------|---------------|-------------------|----------------------|--------------|
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Interim      |               |                   |                      |              |
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Interim      |               |                   |                      |              |
| 2026               | Interim      |               |                   |                      |              |
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Annual       |               |                   |                      |              |
| 2026               | Interim      |               |                   |                      |              |
| 2026               | Interim      |               |                   |                      |              |

\* Shows current rating/reviewing official

Global Filters

For more filter options, open the Filters pane.

Organization

All

Appraisal End Year

2026

Rating Cycle

All

Pay Plan

All

Series

All

Grade

All

Plan Purpose

All

Plan Status

All

Summary Rating Level

All

Clear all filters

For Agency Official Use Only

This report page provides details related to an employee's ratings. You can search by the Employee Name (plan holder), current Rating Official and current Reviewing Official, or employee's Agency Identifier at the top.

The next row down has three toggles; the first (default) allows you to display just the **summary** rating per employee (i.e., one line per employee, showing just the summary rating), the **element** rating (this will display several lines per employee—basically, however many elements the employee has, that will be the number of records shown for each employee), and **both** (this will simply append the summary rating to the previously mentioned element toggle).

The Excel-style tabular list report at the bottom provides detailed rating information for the selected employee(s). Additional rating detailed information (such as Rating Cycle, Plan Status, Account Status, Supervisory Status, etc.) is found by scrolling to the right or exporting to Excel.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Series, Grade, Plan Purpose, Plan Status, and Summary Rating Level

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

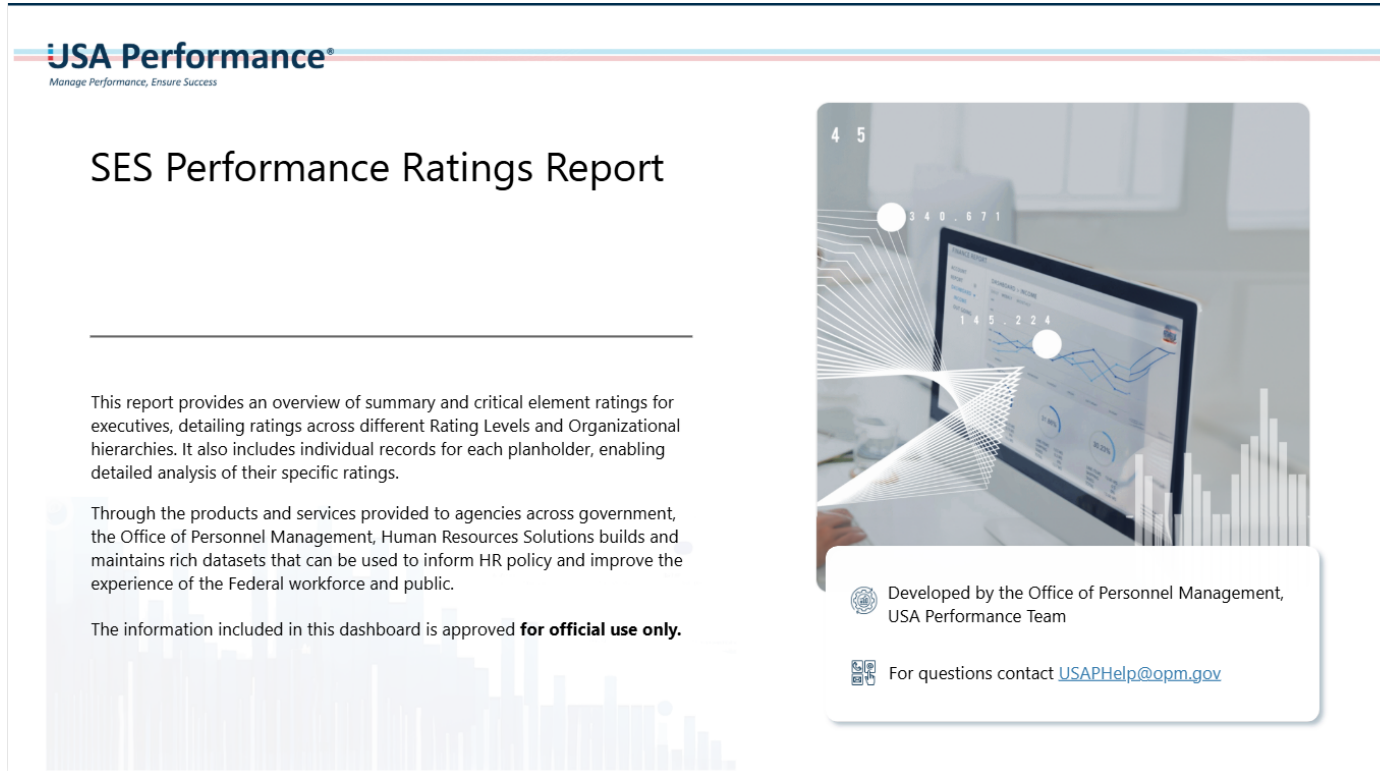
The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

# IX: USAP Ratings-SES Report Walkthrough

- [Overview](#)
- [Summary Ratings](#)
- [Critical Element Ratings](#)
- [Executive Plan Lookup](#)
- [All Ratings](#)
- [Glossary](#)

# SES Performance Ratings Report-Overview

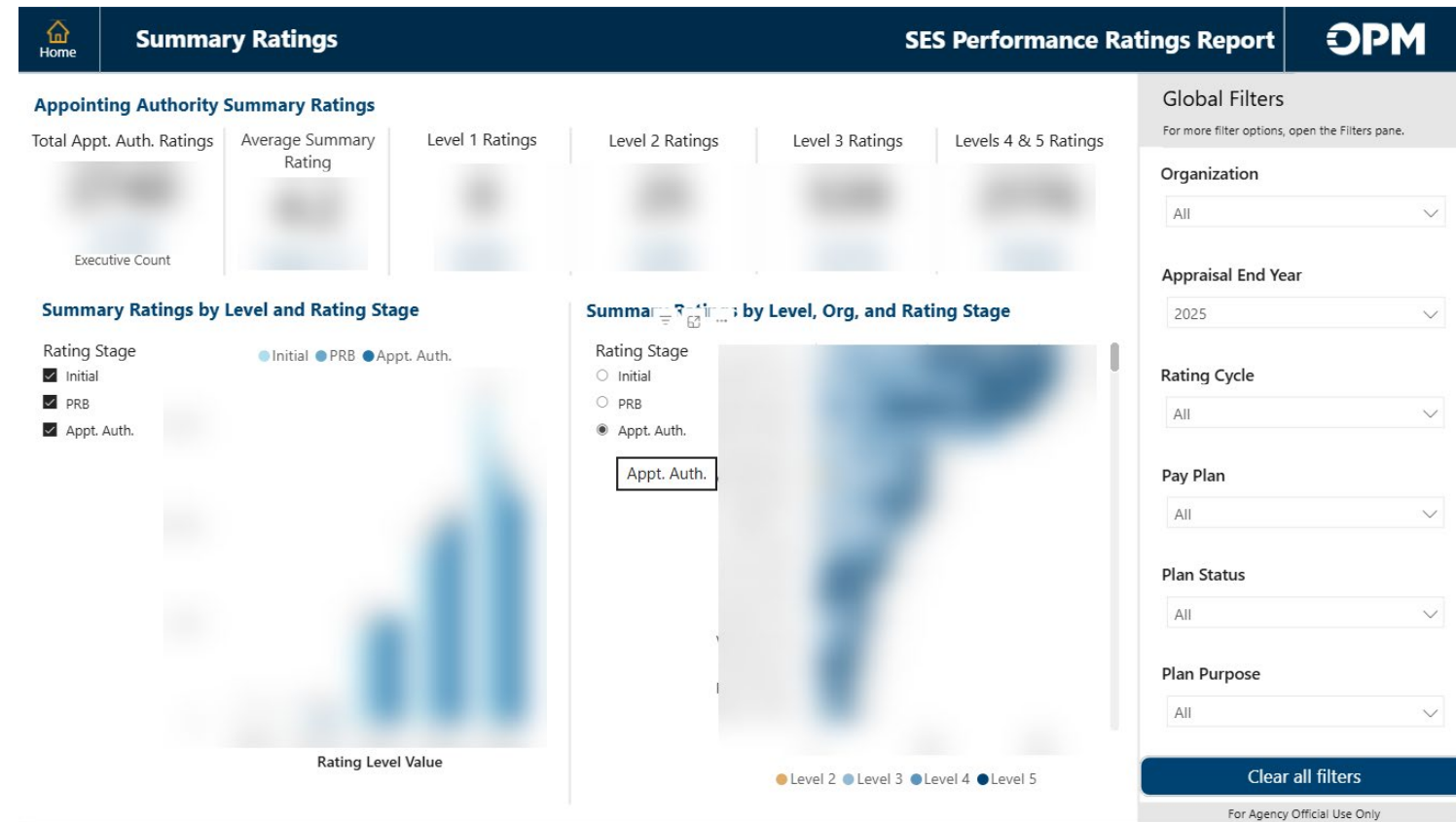


The screenshot shows the 'USA Performance' logo at the top left with the tagline 'Manage Performance, Ensure Success'. The main heading is 'SES Performance Ratings Report'. Below this, there is a paragraph explaining the report's purpose: 'This report provides an overview of summary and critical element ratings for executives, detailing ratings across different Rating Levels and Organizational hierarchies. It also includes individual records for each planholder, enabling detailed analysis of their specific ratings.' Another paragraph follows: 'Through the products and services provided to agencies across government, the Office of Personnel Management, Human Resources Solutions builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.' A disclaimer at the bottom states: 'The information included in this dashboard is approved for official use only.' On the right side of the dashboard, there is a large image of a computer monitor displaying a data visualization with a line graph and bar chart. Below the image, there is a white box containing the text: 'Developed by the Office of Personnel Management, USA Performance Team' and 'For questions contact [USAPHelp@opm.gov](mailto:USAPHelp@opm.gov)'.

A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Senior Executive Service (SES) Power BI reports. There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the SES report on the left-hand navigation pane, this is the first page that shows on the screen.

# SES Performance Ratings Report-Summary Ratings



This report page provides a snapshot of Total Summary Ratings, Average Summary Rating, and the counts of executives with Rating scores of 1, 2, 3, and then 4 and 5 across the top, and their corresponding percentage of the population. The default appraisal end year is 2025.

The lower left bar graph shows the Summary Ratings Distribution by each Rating Level by Rating Stage. Note that the Rating Stages is a multi-select check-mark filter, in which you can select from one or more of the following to view the ratings: Initial, PRB, and Appointment Authority Stage.

The lower right bar graph shows the Summary Ratings by Level, Organization and Rating Stage. Note the Rating Stage in this visualization is toggled via a radio button, where only one Rating stage can be selected.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose

# SES Performance Ratings Report-Critical Element Ratings



This report page can be toggled between the Initial and Appointing Authority Rating Stage, and provides a snapshot of the Total Critical Element (CE) Ratings, Average CE Rating, count of Level 1 CE ratings and the count of Level 4&5 CE ratings. The default appraisal end year is 2025.

The upper visualization breaks down the count of each of the 5 CE Ratings by their rating level values.

The lower bar graph shows the CE Ratings by Level, in tabular format. Note that each of the CE Ratings can be expanded one level down, to see how each of the Level 2 Organizations under the parent agency has performed.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose and AA Summary Rating Level

# SES Performance Ratings-Executive Plan Lookup

Home
 **Executive Plan Lookup**

**SES Performance Ratings Report**

Executive Name

Appraisal End Year  

2021
2022
2023
2024
2025
2026

Hide Agency ID

 Agency Identifier  

All

**Rating Details**

Summary  

Initial
PRB
Appt. Authority

**Critical Elements**

| Critical Element      | Initial | Appt. Authority | Weight |
|-----------------------|---------|-----------------|--------|
| Achieving             |         |                 |        |
| Organizational Goals  |         |                 |        |
| Building Coalitions   |         |                 |        |
| Business Acumen       |         |                 |        |
| Faithful              |         |                 |        |
| Administration of the |         |                 |        |

Rating Cycle

**Plan Details**

Plan Status

Current Rating Official

Current Reviewing Official

**Employment Information**

Organization

Position Title

Appointment Type

Supervisory Status

**Global Filters**  
 For more filter options, open the Filters pane.

Organization  

All

Rating Cycle  

All

Pay Plan  

All

Plan Status  

All

Plan Purpose  

All

AA Summary Rating Level  

All

Clear all filters

For Agency Official Use Only

This report page shows details of executive Plan Ratings, such as their Initial, PRB and AA Ratings, followed by the CE Ratings and Levels, the Rating Cycle, and other Plan and Employment Detail information. An executive's plan can be searched using the drop down menu (one at a time), or by their Agency Identifier. The Appraisal Year can be toggled at the top of the page; the default year is 2025.

The middle of page contains various plan rating metrics, such as summary rating values at the Initial, PRB and AA levels, individual critical element rating values (and their weights), the rating cycle this plan rating was on, what the current plan status is, who the current Rating and Reviewing Officials are, which organization the executive works in, along with their title, appointment type and grade.

The Filters on this page include: Organization, Rating Cycle, Pay Plan, Plan Status, Plan Purpose, and AA Summary Rating Level

# SES Performance Ratings Report-All Ratings

Home

All Ratings

SES Performance Ratings Report

OPM

Executive Name

Rating Official\*

Reviewing Official\*

Agency Identifier

Select a Rating Tier:

Summary

Cr. Element

Both

All Ratings - Summary

| Executive Name | Appraisal End Year | Plan Status | Agency Identifier | Summary: AA Rating Level | Summary: PRB Rating | Summary: Initial Rating | Rating Official |
|----------------|--------------------|-------------|-------------------|--------------------------|---------------------|-------------------------|-----------------|
|                |                    |             |                   |                          |                     |                         |                 |

Global Filters

For more filter options, open the Filters pane.

Organization

All

Appraisal End Year

2025

Rating Cycle

All

Pay Plan

All

Plan Status

All

Plan Purpose

All

AA Summary Rating Level

All

Clear all filters

For Agency Official Use Only

\* Shows current rating/reviewing official

This report page provides details related to an Executive's ratings. You can search by the Executive (plan holder), Rating Official and Reviewing Official at the top. The default appraisal end year is 2025.

The next row down has three toggles; the first (default) allows you to display just the **summary** rating per executive (i.e., one line per executive, showing just the summary rating), the **critical element** rating (in most cases this will display five lines per executive, to correspond with their five critical elements), and **both** (this will simply append the summary rating to the previously mentioned element toggle).

The Excel-style tabular list report at the bottom provides detailed rating information for the selected executive(s). Additional rating detailed information (such as Rating Cycle, Plan Status, Account Status, Supervisory Status, etc.) is found by scrolling to the right or exporting to Excel.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose, and AA Summary Rating Level

# Glossary

Home

Glossary of Terms Used Across Power BI Reports

OPM

Keyword Filter on Field

▼ Enter Field →

Keyword Filter on Definition

▼ Enter Definition →

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

For Agency Official Use Only

The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.

# X: USAP Ratings - SP

- [Overview](#)
- [Summary Ratings](#)
- [Critical Element Ratings](#)
- [SP Plan Lookup](#)
- [All Ratings](#)
- [Glossary](#)

# USAP Ratings - SP: Overview



Manage Performance, Ensure Success

## SP Performance Ratings Report

---

This report provides an overview of summary and critical element ratings for Senior Professionals, detailing ratings across different Rating Levels and Organizational hierarchies. It also includes individual records for Senior Professional planholders, enabling detailed analysis of their performance ratings.

Through the products and services provided to agencies across government, the Office of Personnel Management, Human Resources Solutions builds and maintains rich datasets that can be used to inform HR policy and improve the experience of the Federal workforce and public.

The information included in this dashboard is approved **for official use only**.





Developed by the Office of Personnel Management,  
USA Performance Team

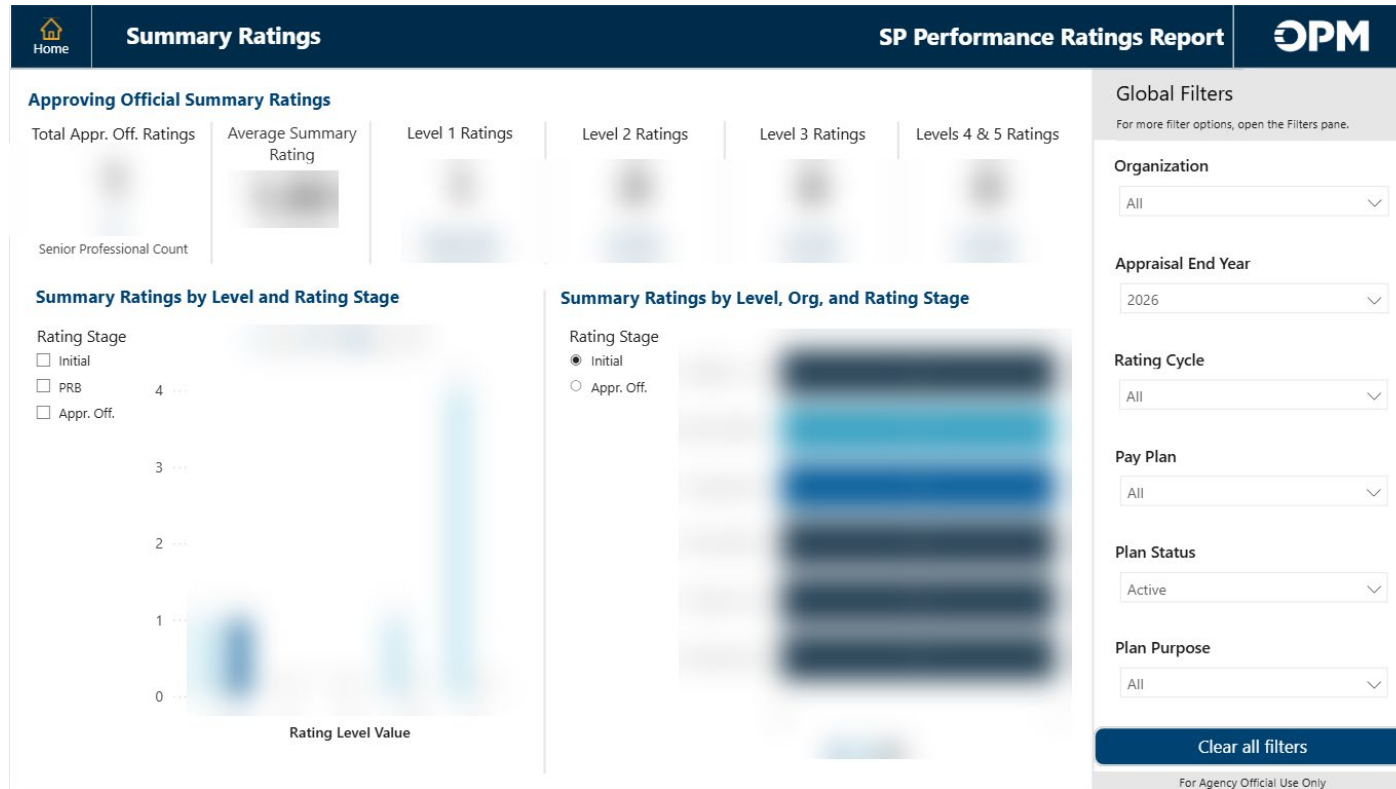


For questions contact [USAPhelp@opm.gov](mailto:USAPhelp@opm.gov)

A welcome screen, custom tailored to what you can expect to see for the ensuing collection of Senior Professional (SP) Power BI reports. There is no data or visualization pertaining to your department on this screen.

Note: When clicking on the SP report on the left-hand navigation pane, this is the first page that shows on the screen.

# USAP Ratings - SP: Summary Ratings



This report page provides a snapshot of Total Summary Ratings, Average Summary Rating, and the counts of Senior Professionals with Rating scores of 1, 2, 3, and then 4 and 5 across the top, and their corresponding percentage of the population. The default appraisal end year is 2026.

The lower left bar graph shows the Summary Ratings Distribution by each Rating Level by Rating Stage. Note that the Rating Stages is a multi-select check-mark filter, in which you can select from one or more of the following to view the ratings: Initial, PRB, and Approving Official Stage.

The lower right bar graph shows the Summary Ratings by Level, Organization and Rating Stage. Note the Rating Stage in this visualization is toggled via a radio button, where only one Rating stage can be selected at a time.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose

# USAP Ratings - SP: Critical Element Ratings



This report page can be toggled between the Initial and Approving Official Rating Stages, and provides a snapshot of the Total Critical Element (CE) Ratings, Average CE Rating, count of Level 1 CE ratings and the count of Level 4 & 5 CE ratings. The default appraisal end year is 2026.

The upper visualization breaks down the count of each of the 5 CE Ratings by their rating level values.

The lower bar graph shows the CE Ratings by Level, in tabular format. Note that each of the CE Ratings can be expanded one level down, to see how each of the Level 2 Organizations under the parent agency has performed.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose and AO Summary Rating Level

# USAP Ratings - SP: SP Plan Lookup

Senior Professional Plan Lookup

SP Performance Ratings Report

OPM

Senior Professional Name

Agency Identifier

Appraisal End Year

All

2026

Rating Details

Summary

Initial

PRB

Appr. Official

Rev. Official

HLR

Critical Elements

| Critical Element Name                                                      | Initial | Appr. Official | Weight |
|----------------------------------------------------------------------------|---------|----------------|--------|
| Achieving Organizational Goals                                             |         |                |        |
| Business Results                                                           |         |                |        |
| Faithful Support of Administration of the Law and the President's Policies |         |                |        |

Rating Cycle

Plan Details

Plan Status

Active

Current Rating Official

Current Reviewing Official

Employment Information

Organization

Position Title

Appointment Type

Supervisory Status

Global Filters

For more filter options, open the Filters pane.

Organization

All

Rating Cycle

All

Pay Plan

All

Plan Status

Active

Plan Purpose

All

AO Summary Rating Level

All

Clear all filters

For Agency Official Use Only

This report page shows details of SP Plan Ratings, such as their Initial, PRB and AA Ratings, followed by the CE Ratings and Levels, the Rating Cycle, and other Plan and Employment Detail information. An SP person's plan can be searched using the drop down menu (one at a time), or by their Agency Identifier. The Appraisal Year can be toggled at the top of the page; the default year is 2026.

The middle of page contains various plan rating metrics, such as summary rating values at the Initial, PRB and AA levels, individual critical element rating values (and their weights), the rating cycle this plan rating was on, what the current plan status is, who the current Rating and Reviewing Officials are, which organization the SP works in, along with their title, appointment type and supervisory status.

The Filters on this page include: Organization, Rating Cycle, Pay Plan, Plan Status, Plan Purpose and AO Summary Rating Level

# USAP Ratings - SP: All Ratings

Home

All Ratings

SP Performance Ratings Report

OPM

Senior Professional Name

Rating Official\*

Reviewing Official\*

Agency Identifier

All

All

All

All

Select a Rating Tier:

Summary

Cr. Element

Both

All Ratings - Summary

| Senior Professional Name | Appraisal End Year | Plan Status | Agency Identifier | Summary: Appr. Official Rating | Summary: PRB Rating | Summary: HLR Rating | Summary: Rev. Official Rating | Summary: Initial I |
|--------------------------|--------------------|-------------|-------------------|--------------------------------|---------------------|---------------------|-------------------------------|--------------------|
|                          |                    |             |                   |                                |                     |                     |                               |                    |

\* Shows current rating/reviewing official

Global Filters

For more filter options, open the Filters pane.

Organization

All

Appraisal End Year

2026

Rating Cycle

All

Pay Plan

All

Plan Status

Active

Plan Purpose

All

AO Summary Rating Level

All

Clear all filters

For Agency Official Use Only

This report page provides details related to an SP’s ratings. You can search by the SP (plan holder), Rating Official and Reviewing Official at the top. The default appraisal end year is 2026.

The next row down has three toggles; the first (default) allows you to display just the **summary** rating per executive (i.e., one line per SP, showing just the summary rating), the **critical element** rating (in most cases this will display five lines per SP, to correspond with their five critical elements), and **both** (this will simply append the summary rating to the previously mentioned element toggle).

The Excel-style tabular list report at the bottom provides detailed rating information for the selected SP. Additional rating detailed information (such as Rating Cycle, Plan Status, Account Status, Supervisory Status, etc.) is found by scrolling to the right or exporting to Excel.

The Filters on this page include: Organization, Appraisal End Year, Rating Cycle, Pay Plan, Plan Status, Plan Purpose, and AO Summary Rating Level

# Glossary

 Home

Glossary of Terms Used Across Power BI Reports



Keyword Filter on Field

Keyword Filter on Definition

| Field                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Status                  | Indicates whether a user's account is active or inactive in the system.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Actor                           | The user performing the event, for example, an employee signing off on a plan in the PAPER.                                                                                                                                                                                                                                                                                                                                                                                        |
| Actor ID                        | A unique identifier assigned to the actor.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Agency Identifier               | Sometimes referred to as an agency's Employee ID, this is an agency-specific unique identifier attributable to each of their employees.                                                                                                                                                                                                                                                                                                                                            |
| Appointment Type                | A classification that describes the nature or category of an employee's engagement or position within the organization. It specifies the terms under which the employee h to determine applicable policies, performance evaluation criteria, and eligibility for certain benefits or programs.                                                                                                                                                                                     |
| Appraisal End Year              | The calendar year in which the performance plan ends.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Appraisal Start Year            | The calendar year in which the performance plan starts.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Appt. Auth.                     | The appointing authority is an official who authorizes the final summary rating for an SES or SP employee. This rating supersedes any prior rating given to an employee.                                                                                                                                                                                                                                                                                                           |
| Board Assignments               | The list of SES and SP users that the Performance Review Board (PRB) group will evaluate for final summary rating purposes.                                                                                                                                                                                                                                                                                                                                                        |
| Board Member                    | A person assigned to a Performance Review Board (PRB) committee who will work, together with the PRB chair, to assign a final summary rating to their list of SES and/or                                                                                                                                                                                                                                                                                                           |
| CE: Appointing Authority Rating | The final (appointing authority) rating given to each Critical Element (CE).                                                                                                                                                                                                                                                                                                                                                                                                       |
| CE: Initial Rating              | The Critical Element (CE) rating typically given by the employee's rating official.                                                                                                                                                                                                                                                                                                                                                                                                |
| Critical Element (CE) Name      | The five critical elements for SES for FY25 are: Building Coalitions; Business Acumen; Leading Change; Leading People; Results Driven. FY26 has all new elements:<br>Critical Element 1. Faithful Administration of the Law and the President's Policies<br>Critical Element 2. Government Efficiency<br>Critical Element 3. Merit and Competence<br>Critical Element 4. Holding Others Accountable and Treating Them Fairly<br>Critical Element 5. Achieving Organizational Goals |
| Critical Elements               | A critical element is a work assignment or responsibility of such importance that unacceptable performance on that element would result in a determination the employee Governmentwide regulations require employees have at least one critical element in their performance plans. Critical elements must address performance at the individua                                                                                                                                    |
| Current Phase                   | Indicates the current period in the employee's performance plan management cycle, or if the plan is Completed. In Power BI, plans in Planning, Progress Review, and Rati that is shown instead.                                                                                                                                                                                                                                                                                    |
| Current Rating Official         | The employee's current Rating Official. Note that this is the current Rating Official in the system, and not necessarily the Rating Official at the time of rating.                                                                                                                                                                                                                                                                                                                |

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The Glossary report page is found at the end of every report and contains the fields included in each USA Performance® report.

You can filter by keyword Field and/or Definition in the boxes at the top, to narrow your search results further.