eNAVFIT

Quick Reference Card (QRC)

Version 1.1

PERFORMANCE
EVALUATION
TRANSFORMATION

Nov 2022

The Quick Reference Cards (QRC) are meant as a supplement to the User Guide to allow members to quickly accomplish their tasks within the eNavFit interface using easy-to-follow pictures and step-by-step instructions. For detailed information, refer to the User Guide.
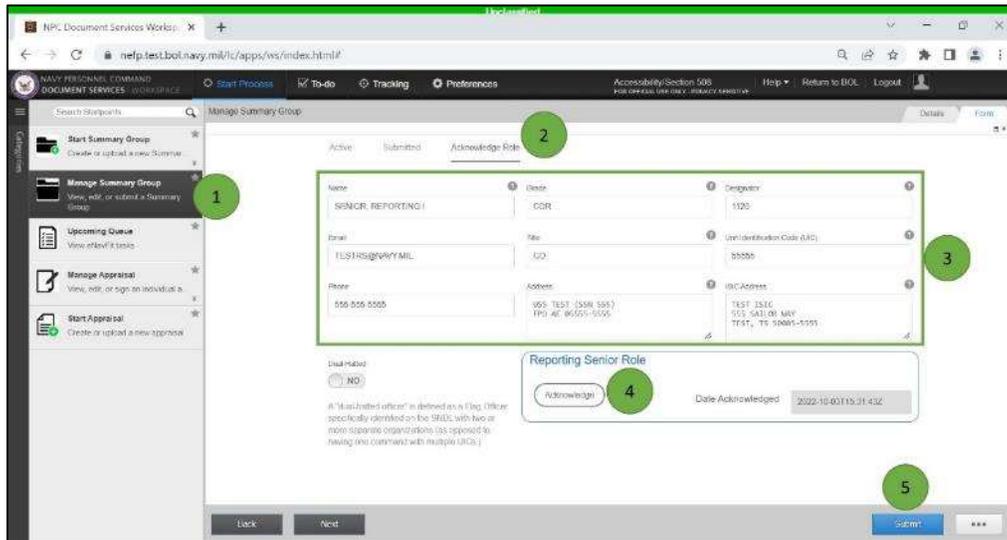
Working within the eNavFit Interface: The <u>Reporting Senior</u> and <u>Trusted Agent</u> will mostly work from the Start and Manage Summary Group tabs. <u>Reviewers</u> and the <u>Member</u> will provide inputs using the Start and Manage Appraisal.

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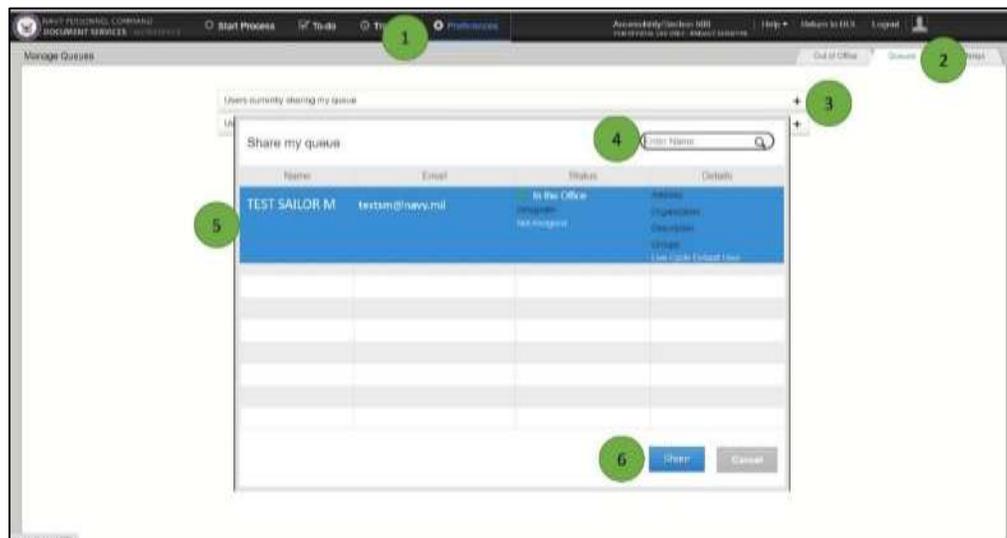
Reporting Senior Actions

1.1 – Acknowledge User Role

Steps:
1. Select "Manage Summary Group"
2. Select "Acknowledge Role"
3. Verify/Update personal information
4. Select the "Acknowledge" button
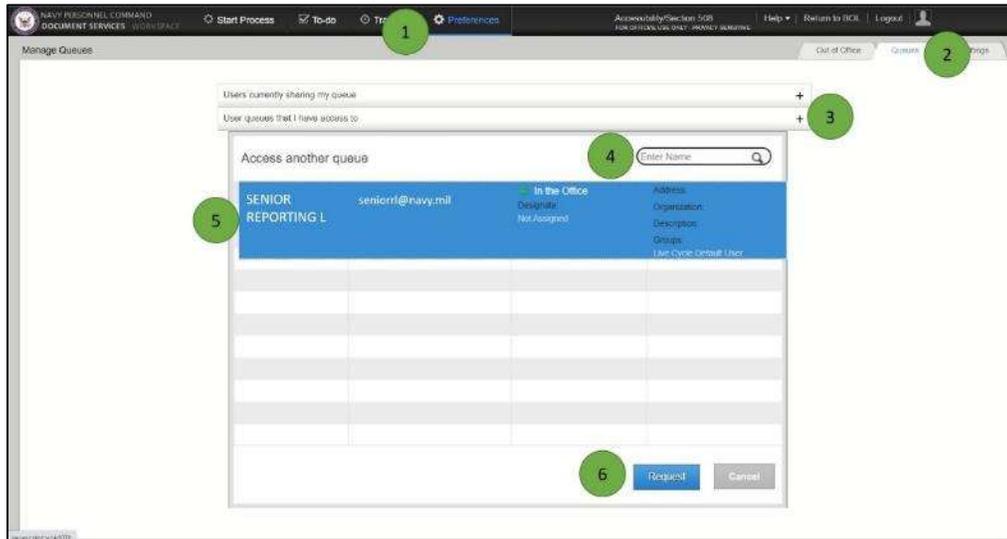5. Select the "Submit" button

1.2 – Assign Trusted Agent

Steps:
1. Select "Preferences"
2. Select "Queues"
3. Select the "+" next to "Users currently sharing my queue"
4. Enter the name of the desired trusted agent as last name first name without punctuation (i.e., Smith John)
5. Select the member from those listed
6. Select the "Share" button

Trusted Agent Action

1.3 – Request Queue Access From Reporting Senior

Steps:
1. Select "Preferences"
2. Select "Queues"
3. Select the "+" next to "User queues that I have access to"
4. Enter the name of the desired reporting senior as last name first name without punctuation (i.e., Smith John)
5. Select the reporting senior from those listed
6. Select the "Request" button

Reporting Senior/Trusted Agent Action
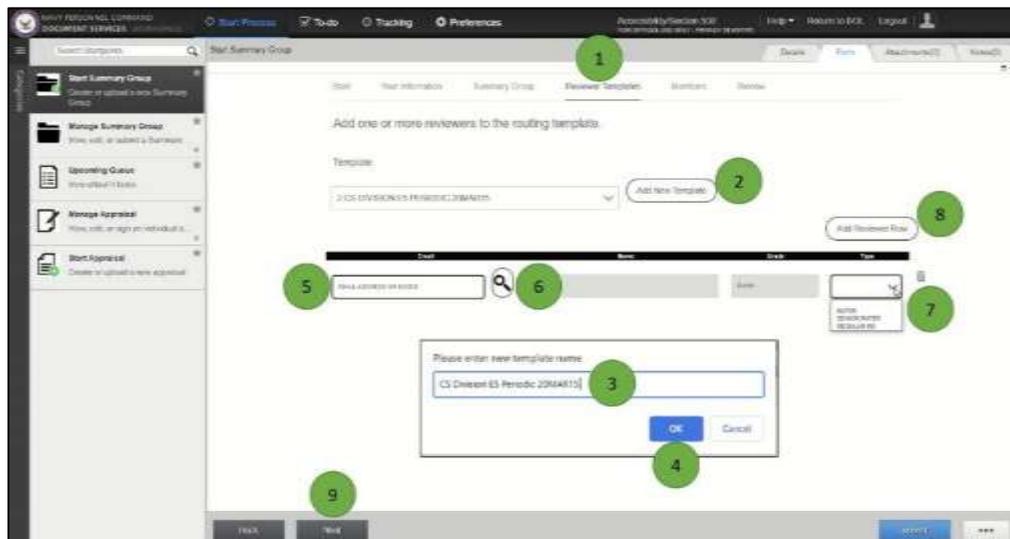
1.4 – Start Summary Group
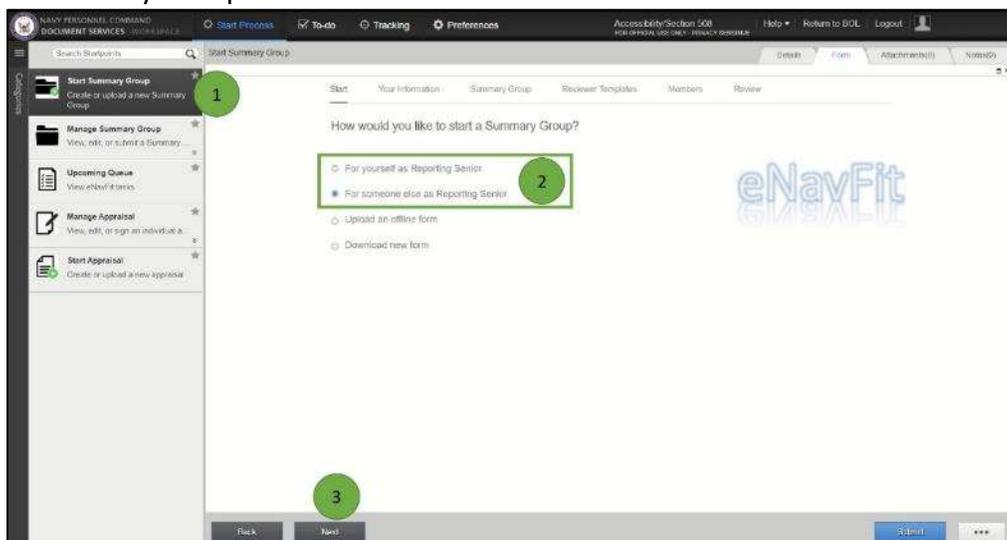
Steps:
1. Select "Start Summary Group"
2. A) Select "For yourself as Reporting Senior" if you are the Reporting Senior
   B) Select "For someone else as Reporting Senior" if you are the Trusted Agent
3. Select the "Next" button

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Steps:
1. Verify the "Summary Group" tab is underlined
2. Input the summary group information
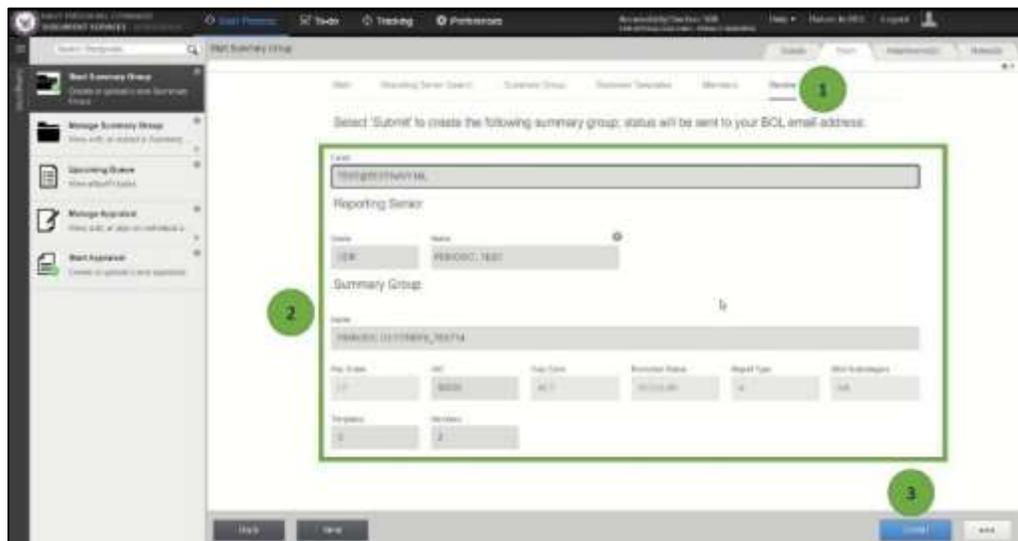3. Select the "Next" button

Steps (Optional):
1. Verify the "Reviewer Template" tab is underlined
2. Select the "Add New Template" button
3. Input a reviewer template title into the text field
4. Select the "OK" button
5. Enter the DODID or email of the first reviewer
6. Select the magnifying glass icon or press the Enter key
7. Assign the reviewer type or leave field blank if the reviewer is unassigned
8. Select "Add Reviewer Row" to add additional reviewers. Repeat steps 5-8 for additional reviewers
9. Select the "Next" button

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Steps (Optional – Best Practice):
1. Verify the "Members" tab is underlined
2. Enter the DODID or email of the member
3. Select the magnifying glass icon or press the Enter key
4. Verify/Input the designator (if Officer)
5. Select the Reviewer Template from the drop-down if one has been created
6. Select the "Add Member Row" to add additional members (repeat steps 2-5 for each additional member
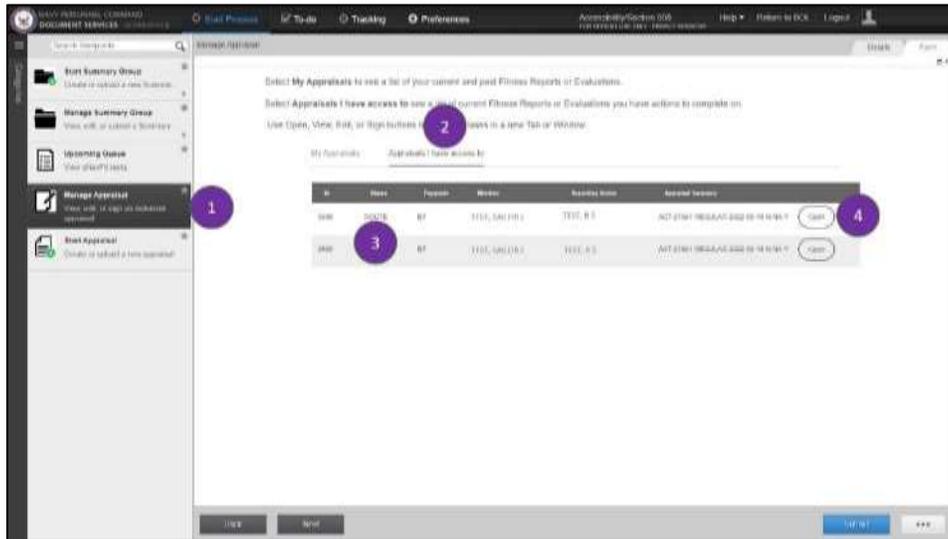7. Select the "Next" button

Steps:
1. Verify the "Review" tab is underlined
2. Verify the summary group information is correct
3. Select the "Submit" button

Reviewer Action

2.1 – Review Appraisal

Steps:
1. Select "Manage Appraisal"
2. Select "Appraisals I have access to"
3. Verify the status as "Route"
4. Select the "Open" button

The "Open" button will open an additional browser window labeled "Appraisal Task" indicating that you are working on an individual appraisal.
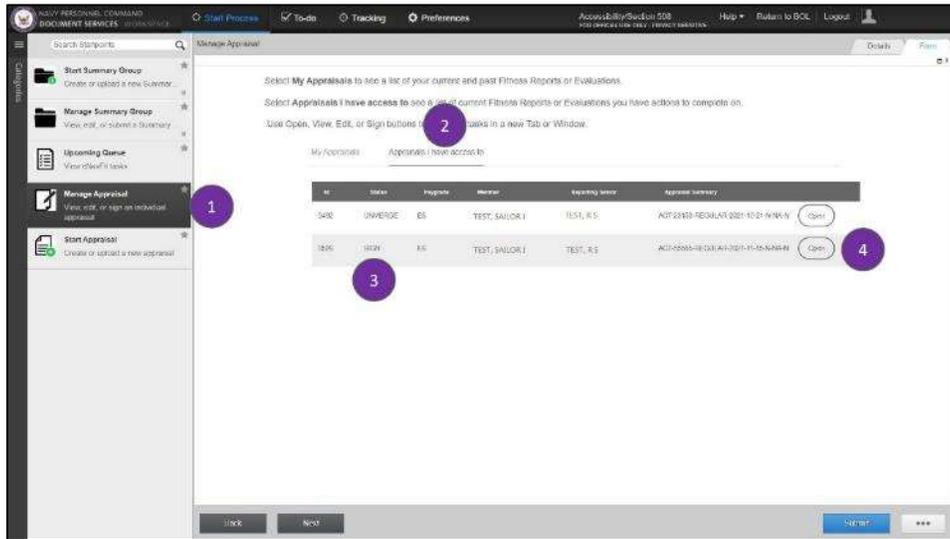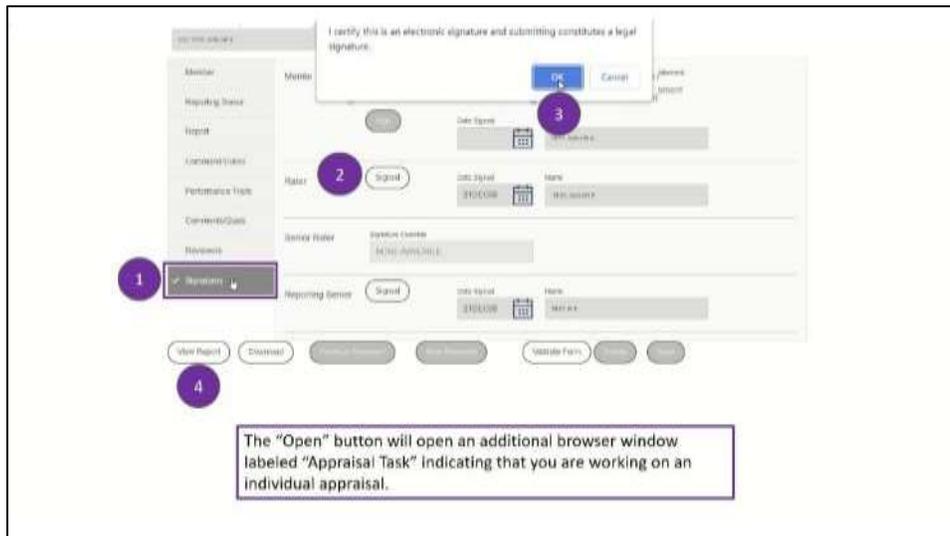
Steps:
1. Select the tab that you would like to work within
2. Select "Save" when your input is complete
3. Select "View Report" to preview the appraisal
4. Select the "Previous Reviewer" button to send it back to the previous reviewer or "Next Reviewer" to forward it to the next reviewer

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Reviewer Action

2.2 – Apply Reviewer Signature

Steps:
1. Select "Manage Appraisal"
2. Select "Appraisals I have access to"
3. Verify the status as "Sign"
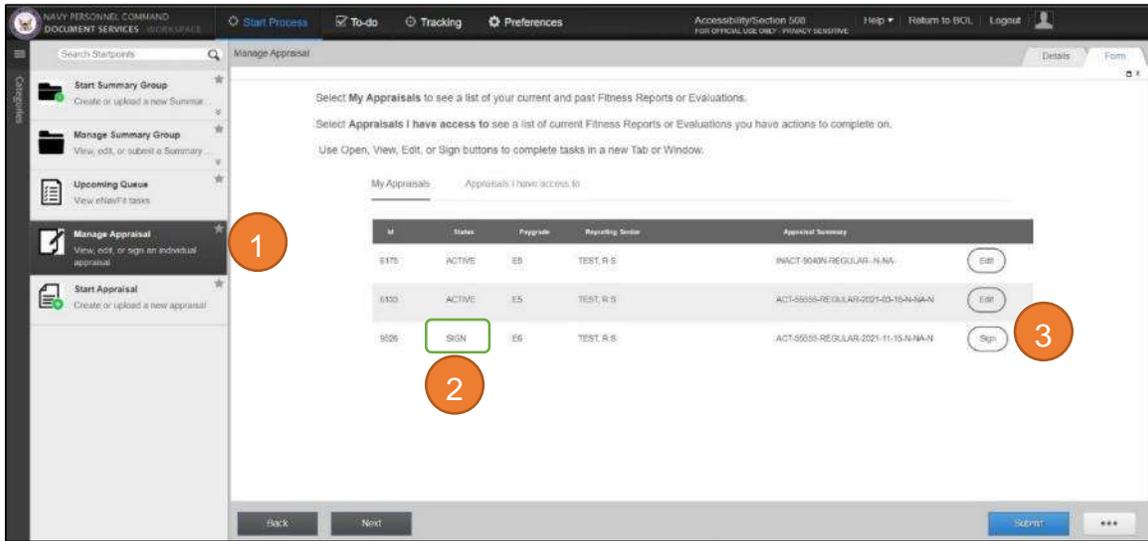4. Select the "Open" button

Steps:
1. Select the "Signatures" tab
2. Select "Sign" next to your reviewer User Role (i.e., Rater or Senior Rater)
3. Select "OK" button certifying that you understand that you are applying an electronic signature to the appraisal
4. Select the "View Report" button to ensure that your signature is captured on the appraisal.
5. Close the "Appraisal Task" browser window

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Evaluated Member Actions

3.1 - Apply Member Signature (Online)

Steps:
1. Select "Manage Appraisal"
2. Verify status displays "Sign"
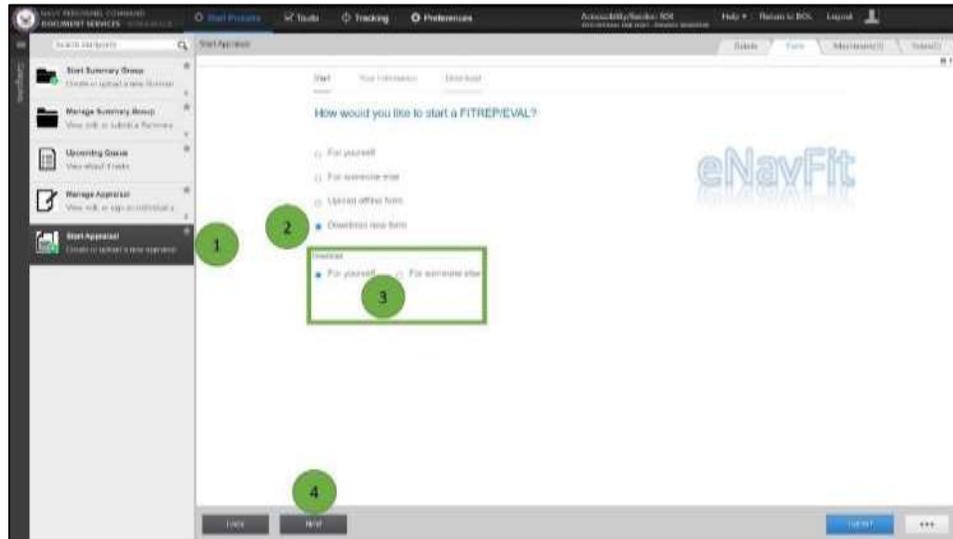3. Select the "Sign" button
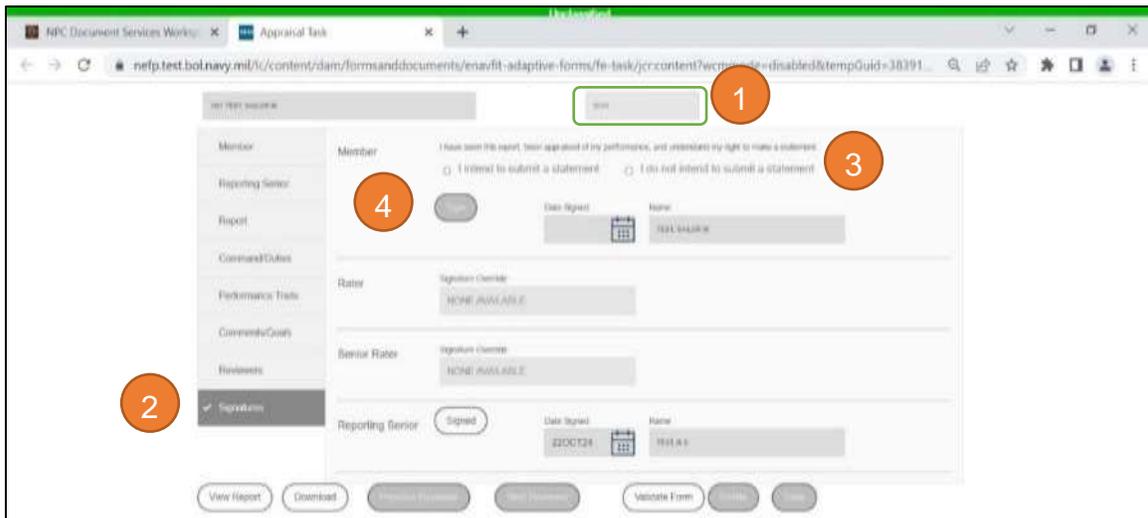
Steps:
1. Verify status displays "Sign"
2. Select "Signatures"
3. Select statement submission indication
4. Select "Sign"
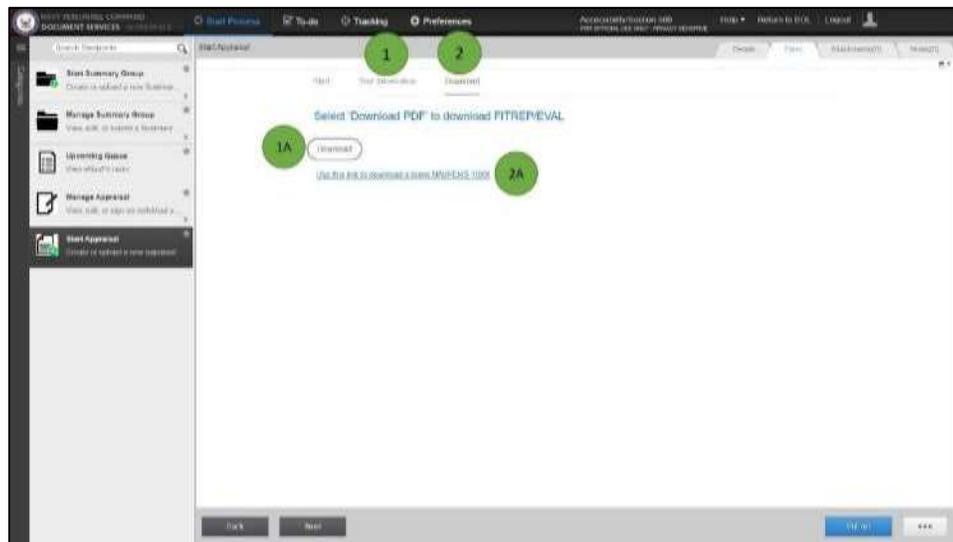5. Close the "Appraisal Task" browser window

All User Actions
4.1 – Download 16XX

Steps:
1. Select the "Start Appraisal" tab
2. Select "Download new form"
3. Select "For yourself" to download a prepopulated 16XX form for yourself or "For someone else" to download a prepopulated form for another member
4. Select the "Next" button

Steps:
1. Proceed to the "Your Information" tab if you selected "For yourself". Proceed to the "Member Search" if you selected "For someone else". These fields will allow you to verify or enter information to download a prepopulated 16XX form.

1A. Proceed to the "Download" button to download a prepopulated 16XX form based on the information that was provided.

2. If downloading a Blank 16XX form, you may skip directly to the "Download" tab

2A. Select "Use this link to download a blank NAVPERS 16XX"

NOTE: A pop-up display will appear. Save the PDF form to the desired location.

4.2 – Signing the 16XX (Offline)

Steps:
1. Select the field to apply a signature
2. Select "Yes" certifying that you understand you will by applying a digital signature to the appraisal
3. Save the form with the signature applied
4. Close the form and forward to the next signatory via the preferred method