



NATIONAL ASSOCIATION OF POSTAL SUPERVISORS

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November 12, 2024

Board Memo 170-2024: Updated FY2024 Pay-for-Performance Programs

Executive Board,

Please find attached two updated Pay-for-Performance programs provided from the USPS. The attached Employee and Evaluator Rating Recourse Job Aids for non-bargaining employees have been updated for the FY2024 fiscal year.

Please share this information with your membership.

Thank you and be safe.

NAPS Headquarters

LABOR RELATIONS



November 6, 2024

RECEIVED
NOV 11 2024

Mr. Ivan Butts
President
National Association of Postal Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Dear Ivan:

This is in further reference to the Postal Service's Pay-for-Performance programs. The Employee and Evaluator Rating Recourse Job Aids for non-bargaining employees has been updated for this fiscal year and provided for your review.

Enclosed you will find two copies, the Employee Rating Recourse Job Aid and the Evaluator Rating Recourse Job Aid. Please contact Paulita Wimbush at extension 4042 if you have any questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "B. Nicholson", with a long horizontal flourish extending to the right.

Bruce A. Nicholson
Director
Labor Relations Policies and Programs

Enclosures

Employee Rating Recourse

Job Aid

November 2024



Overview

This job aid contains instructions on how to request and submit a Rating Recourse in the Performance Pilot system. A Rating Recourse can be requested when an employee disagrees with their final FY Individual Rating (Average of All Ratings) and believes that their final rating does not accurately reflect the product, effort, or results achieved during the fiscal year.

New for FY24: The Rating Recourse process has been updated for FY24 and now includes a two-part submission process for employees:

- **Part 1 (New for FY24):** Complete the Rating Recourse Request Form by Thursday, November 21 at 11:59 PM EST to initiate the Rating Recourse Process.
- The following day, you will receive an email providing access to the Rating Recourse Process in the Performance Pilot system.
- **Part 2:** Complete and submit the Rating Recourse by Friday, November 22 at 11:59 PM EST.

Key notes before you get started:

- Recourse is only available after year-end ratings have been finalized; dates will be communicated annually.
- **Only the 1st Recourse request will be accepted. Employees will not be able to make changes after the 1st submission.** If the Recourse Request is disapproved by the 2nd evaluator, the Rating Recourse request is closed for consideration and there is no further appeal process.

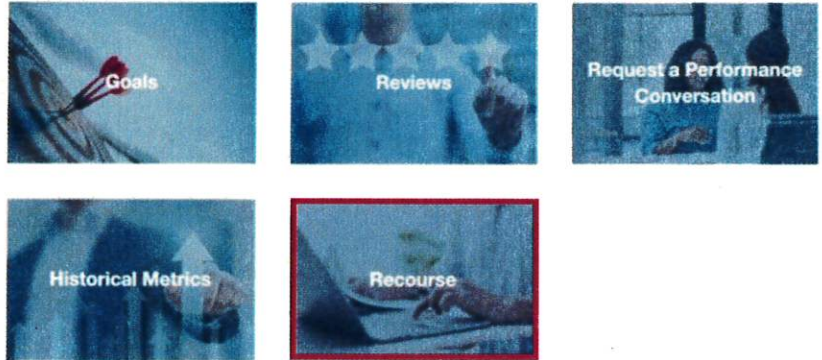


How to request and submit a Rating Recourse

1. Access the **Performance Pilot** system homepage and select the **Recourse** button under **Track Performance**.

Note: Recourse requests should only be submitted if the employee disagrees with their Final FY Individual Rating (Average of All Ratings) (as shown in the red square on the My Performance Scorecard on the Performance homepage). This process is not to be utilized to recourse individual goal ratings.

Track Performance



My Performance Scorecard FY24



2. Complete the Rating Recourse Request Form and click the **Submit** button to access and initiate the Rating Recourse process.

Recourse Request FYXX for

Complete this request form if you wish to recourse your FY24 Overall Individual Performance Rating. Please note that you may only recourse your Overall Individual Performance Rating which is the average of all goal ratings received during the Mid-Year and End-of-Year evaluation periods. Ratings Recourse is not for individual goal ratings, Mid-Year or End-of-Year Ratings. Once you submit this form, you will receive an email notification confirming your submission request and include next steps.

All fields marked with an asterisk are required.

Please note the last day to submit this Recourse Request form is MM/DD/YYYY HH:MM EST

I am requesting recourse for my FYXX Overall Performance Score *

Select *

I acknowledge this is not a recourse for my Mid-Year Rating. *

Yes

I acknowledge this is not a recourse for my End-of-Year Rating. *

Yes

I acknowledge this is not a recourse for my individual goal ratings. *

Yes

Cancel Submit

Employee Rating Recourse Job Aid



3. The following day, you will receive an email notifying you to access the Rating Recourse task on the **My Assigned Reviews** tab under **Reviews**.

Performance Review Summary -

Launch Reviews

My Assigned Reviews | My Pending Reviews

Date: Search

Status: Not started In Progress Completed Incomplete Expired

Title ID	Description	Status	Start Date	Due Date	Last Modified Date
Employee Recourse Request	HR2 Optional Individual Rating Recourse	Open	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY
Complete your HR2 Self-Evaluation (End of Recourse and by Mail-see Review)	Review	Open	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY

4. On the **Overview** page, you will see the step progression for the Rating Recourse Process. Click the **Next** button to complete the form.

INDIVIDUAL RATING (AVERAGE OF ALL RATINGS) RE-COURSE SUBMISSION

Overview

The following information will be used to determine the pay for the review process and to provide managers with a person who is providing training information for training needs, promotional assignments, compensation considerations, and other job related activities. Information is shared with supporting your information is accurate, but not provided, you may not be able to participate in all aspects of the pay for performance program. We do not have the information to share with you except through your direct supervisor or a designated representative. This includes the following: (1) information to be used in legal proceedings involving the Postal Service, to government agencies or contractors with respect to matters relating to aspects of contractor after receiving to life a business function to the Equal Employment Opportunity Commission (EEOC) when requested or connected with the investigation of a complaint against the Postal Service or on behalf of the Office of Special Counsel for the purpose of litigation; (2) regarding individual's employment history, including other applicable laws, which may be disclosed to the news media or the National Labor Relations Board when consistent with the public's right to know. For more information on our privacy policies, visit www.usps.com/privacy.

The recourse process allows employees to dispute their individual rating based on Mail Ratings. Employees must provide a written document and a copy of their current self-evaluation. Final recourse decisions will be made by compensation.

The Recourse process consists of the following steps:

1. **Individual Rating Recourse Submission** - Employee submits Recourse Request for their individual rating based on all ratings.
2. **Individual Rating Recourse 1st Evaluation** - Direct Manager reviews request and submits decision.
3. **Individual Rating Recourse 2nd Evaluation** - Next higher level manager reviews request and submits decision on appeal item.
4. **Compensation Final Review and Approval** - Compensation & Benefits Department reviews and considers Mail Rating before release to employee.

The Employee's Individual Rating Recourse Submission will be submitted to the Mail Rating Recourse Request within 10 business days of the Mail Rating. Requests cannot be submitted after the Mail Rating Recourse is available for the **Individual Rating (Average of All Ratings)** on a full-time basis and not available for the Mail Rating. The process is subject to the individual's right to file a grievance or a complaint. Only the final individual rating Recourse 1st evaluation will be processed and provided to employees. Subsequent submissions will not be reviewed. Thus, please ensure accuracy and completion of the first submission.

When Rating Recourse requests are finalized, all employees who submitted a request will receive an email notification informing them to access the system to view the final decision.

Review Overview

- Individual Rating (Average of All Ratings) Recourse Submission
- Individual Rating (Average of All Ratings) Recourse 1st Evaluation
- Individual Rating (Average of All Ratings) Recourse 2nd Evaluation
- Compensation Final Review and Approval

Next

Employee Rating Recourse Job Aid



5. Use the dropdown lists in the form to select the **Original Individual Rating**, which is your **final FY Individual Rating (Average of All Ratings)**.

Next, select the **Requested Rating Recourse Change**. Your **Requested Rating Recourse Change** **MUST** be greater than your **Original Individual Rating**.

Note: If you received an **N/A** rating, select **N/A** from **Original Rating** dropdown list and then the rating you believe you should receive from the **Requested Rating Recourse Change** dropdown list.

FYXX Individual Ratings Recourse Form

Complete the Individual Rating (Average of All Ratings) Recourse Form and submit the form along with any documentation (maximum of 3 attachments and a total of 1 MB total) and data source that supports your requested change. Use the **Options** button above to add any necessary attachments. **Please note that once submitted, the request will go to the Direct Manager and then directly to the Next Higher Level Manager.**

Current Individual Rating
Please select your Current Individual Rating (average of all goal ratings). The Current Individual Rating that you select from the below dropdown should match the Individual Rating on your My Performance Scorecard. Please ensure accuracy in your selection.

My Performance Scorecard FYXX

Individual Rating
Average of All Ratings

4-Exceeds Fully Successful

Select

- 5- Outstanding
- 4-Exceeds Fully Successful
- 3- Fully Successful
- 2- Minimally Successful
- 1- Unsatisfactory
- N/A- No Rating

If like your Current Individual Rating changed to. This rating MUST be greater than your Current Individual Rating above. or will be denied.

Requested Rating Recourse Change
Please select the rating that you would like your Current Individual Rating changed to. This rating **MUST** be greater than your Current Individual Rating above. All requests for the same rating or lower will be denied.

Select

- 5- Outstanding
- 4-Exceeds Fully Successful
- 3- Fully Successful
- 2- Minimally Successful
- 1- Unsatisfactory
- N/A- No Rating

Character count: 0

Save for Later

Next

6. Enter comments to justify the rating change. You must address your rationale and justification for challenging your **final Individual Rating**. Comments are required and have a 10,000-character limit.

Click **Next** when you are done.

Justification for Rating Recourse (10,000 character limit)

Character count: 0

Save for Later

Next

Employee Rating Recourse Job Aid



7. To attach supporting documents, select **Attachments** from the **Options** dropdown in the upper right corner of the signature page.

Note: You and your evaluator combined may add up to 3 total attachments with a maximum total upload size of 1 MB.

8. Please read the affirmation and check the **Acknowledgment** checkbox and then click the **Sign** button. Once your signature has been captured and a date is present, select the **Submit** button.

This will display a pop-up window indicating that you will not be able to modify the form once you submit. If you are ready, click the **Submit review** button.

You will receive another pop-up window indicating that you have successfully submitted your Rating Recourse. Click **Return to Review**.

Note: When Rating Recourse requests are finalized, all employees who submitted a request will receive an email notification informing them to check the Performance Pilot to view the final decision.

If the rating has been changed due to recourse, the new rating will be reflected on the **My Performance**

Employee Rating Recourse Job Aid



MyHR

Scorecard section of the **Performance Pilot** page.

The 1st and 2nd evaluator decisions are required. The status will show **Pending Signature** when the employee request is submitted.

Are you sure you want to submit your Individual Rating (Average of All Ratings) Recourse Submission?

You will not be able to modify once you have submitted.
Are you sure you want to submit now?

Cancel

Submit review



You have successfully submitted the Individual Rating (Average of All Ratings) Recourse Submission for

Exit

Return to Review

Support

Check out the [Performance Pilot Job Aids](#) page for additional content!



Evaluator Rating Recourse

Job Aid

November 2024



Overview

This job aid contains instructions on how to review an employee's Rating Recourse request in the Performance Pilot system. A Rating Recourse can be requested when an employee disagrees with their **final FY Individual Rating (Average of All Ratings)** given and believes that the Individual Rating does not accurately reflect the product, effort, or results achieved during the fiscal year.

Key notes before you get started:

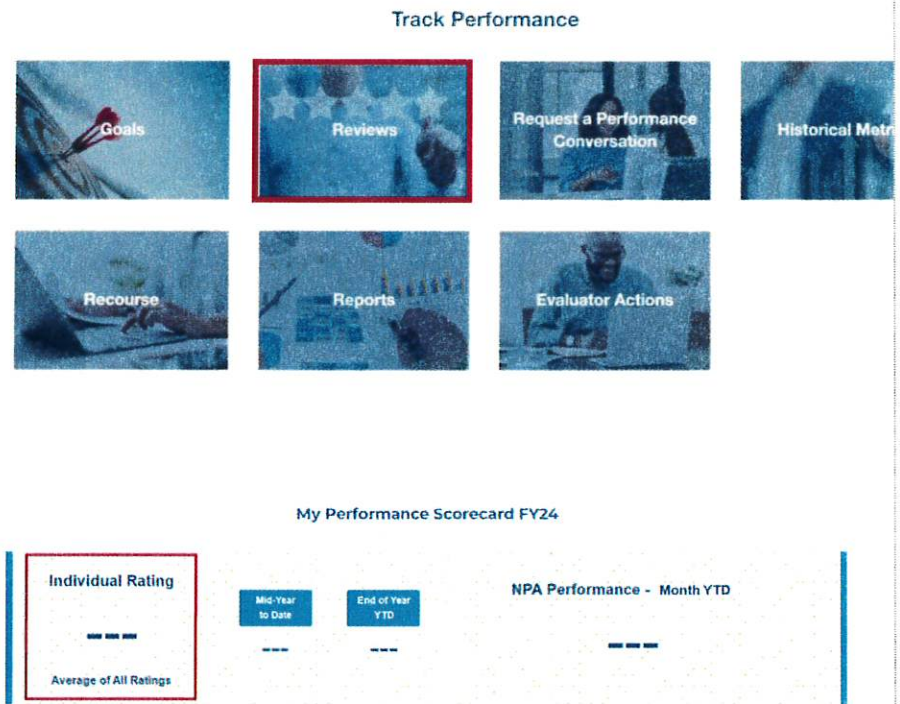
- Recourse is only available after year-end ratings have been finalized; dates will be communicated annually.
- **Only the 1st Recourse request will be accepted. Employees will not be able to make changes after the 1st submission.** If the Recourse Request is disapproved by the 2nd evaluator, the Rating Recourse request is closed for consideration and there is no further appeal process.

Review a Rating Recourse Request (1st and 2nd Evaluators)

1. Access the **Performance Pilot** system homepage and select the **Reviews** button under **Track Performance**.

Note: Recourse requests should only be submitted if the employee disagrees with their Final FY **Individual Rating (Average of All Ratings)** (as shown in the red square on the My Performance Scorecard on the Performance homepage). This process is not to be utilized to recourse individual goal ratings.

1st and 2nd evaluators will follow the same steps in this job aid.



2. Click the **My Assigned Reviews** tab and select the recourse request for review and approval.

Performance Review Summary - Marty Manager



Evaluator Ratings Recourse

Job Aid



MyHR

3. On the **Overview** page, you will see the step progression for the Rating Recourse process. Click the **Next** button to begin your review.

Overview

Privacy Act Statement: Your information will be used to administer the Pay for Performance program, and to provide managers and supervisors with decision-making information for training needs, promotion, assignment considerations, or other job-related actions. Collection is authorized by 5 U.S.C. 401, 416, 1001, 1005, and 1206. Supplying your information is voluntary, but if not provided, you may not be able to participate in all aspects of the Pay for Performance program. We do not disclose your information to third parties without your consent, except to act on your behalf or request, or as legally required. This includes the following limited circumstances: to a congressional office on your behalf; to an authorized U.S. Postal Service auditor for law enforcement purposes; to labor organizations as required by applicable law; incident to legal proceedings involving the Postal Service; to government agencies in connection with decisions as necessary to agents or contractors when necessary to fulfill a business function; to the Equal Employment Opportunity Commission (EEOC) when requested in connection with the investigation of a formal complaint; and to the Internal Security Protection Board or Office of Special Counsel for the purpose of litigation. Records regarding recipients of awards by employees involving driver safety records may be disclosed to the news media or the National Safety Council when consistent with the public's right to know. For more information on our privacy policies, visit www.usps.com/privacypolicy.

The Recourse process allows employees to dispute their Individual Rating (Average of All Ratings). Employees must provide information, documentation, and/or contact to justify a rating change. Final recourse decisions will be made by Compensation.

The Recourse process consists of the following steps:

1. **Individual Rating Recourse Submission** - Employee submits Recourse Request for their Individual Rating (Average of All Ratings)
2. **Individual Rating Recourse 1st Evaluator** - Direct Manager reviews request and submits decision
3. **Individual Rating Recourse 2nd Evaluator** - Next Higher Level Manager reviews request and submits decision to approve/deny
4. **Compensation Final Review and Approval** - Compensation & Benefits Department reviews and validates final rating before release to employee

The Direct Manager recourse decision must be submitted no later than Friday, November 29, 2024 at 11:59 PM EST. Once the decision is entered, the Rating Recourse Request will proceed to the Next Higher Level for Review. This decision is entered, the Rating Recourse Request will automatically proceed to the Next Higher Level Manager for review on Saturday, November 30, 2024.

Employees may utilize the Rating Recourse process if they believe they have received an Individual Rating (Average of All Ratings) for the fiscal year that does not reflect a fair evaluation of their performance. This process is not to dispute their individual year ratings or the Mid-Year or End-Year rating. If you choose to approve the recourse request, the Rating change must be higher than the **Current Individual Rating**.

For detailed instructions on how to respond to an employee's Rating Recourse request, please visit the Evaluator Rating Recourse Job Aid located on the Performance Job Aid page in MyHR.

Review Overview

Individual Rating (Average of All Ratings) Recourse Submission

Individual Rating (Average of All Ratings) Recourse 1st Evaluator

Individual Rating (Average of All Ratings) Recourse 2nd Evaluator

Compensation Final Review and Approval

Next



Evaluator Ratings Recourse

Job Aid



MyHR

- You will be navigated to the employee's Rating Recourse form displaying the **Original Individual Rating**, the **Requested Rating Recourse Change**, the justification, and any attached documents to support the rating change request.

Review all submitted materials and content carefully.

Note: The employees **Requested Rating Recourse Change MUST be greater than their Original Individual Rating.**

When your review is complete, select the **Next** button.

Options ▾

SURFACE LOGISTICS PLANNING SPEC 1

Review period: MM/DD/YYYY-MM/DD/YYYY Due by: MM/DD/YYYY

FYXX Individual Ratings Recourse Form

Complete the Individual Rating (Average of All Ratings) Recourse Form and submit the form along with any documentation (maximum of 5 attachments and cannot exceed 10 MB total) in one course that supports your requested change. Use the **Options** button above to add any file(s) as attachment. **Please note that once submitted, the request will go to the Direct Manager and then directly to the Next Higher Level Manager.**

The Direct Manager recourse decision must be submitted no later than Friday, November 29, 2024 at 11:59 PM EST. Once the decision is entered, the Rating Recourse Review will proceed to the next higher level for Review. If no decision is entered, the Rating Recourse Request will automatically proceed to the Next Higher Level Manager for review on Saturday, November 30, 2024.

Employees may utilize the Ratings Recourse process if they believe they have received an Individual Rating (Average of All Ratings) for the fiscal year that does not reflect a fair evaluation of their performance. This process is used to dispute their individual goal ratings or the Mid-Year (mid-of-year) rating. If you intend to approve the recourse request, the Rating change must be higher than the **Current Individual Rating**.

For detailed information on how to respond to an employee's Rating Recourse request, please visit the Evaluator Rating Recourse Job Aid located on the Performance and Job Aids page in STARS.

Current Individual Rating
Please select your **Current Individual Rating (average of all goal ratings)**. The **Current Individual Rating** that you select from the below dropdown should match the **Individual Rating** on your **My Performance Scorecard**. Please ensure accuracy in your selection.

My Performance Scorecard FYXX

Individual Rating --- Average of All Ratings	Mid-Year in Date ---	End of Year YTD ---	NPA Performance - Month YTD ---
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(Self) Rated: 3 - Fully Successful Review : Optional FY24 Individual Rating Recourse Title : MM/DD/YYYY - MM/DD/YYYY

Requested Rating Recourse Change
Please select the rating that you would like your **Current Individual Rating** changed to. This rating **MUST be greater than your Current Individual Rating above**. All requests for the same rating or lower will be denied.

(Self) Rated: 4 - Exceeds Fully Successful Review : Optional FY24 Individual Rating Recourse Title : MM/DD/YYYY - MM/DD/YYYY

Justification text here.

[Save for Later](#) [Next](#)

Evaluator Ratings Recourse Job Aid



5. Complete the evaluator approval.

After thoroughly reviewing the justification and provided documentation (if applicable), select **Approve** or **Disapprove** from the **Evaluator Decision** dropdown list.

Provide a detailed justification for your approval/disapproval decision in the **comments** field. There is a 2,500-character limit.

Confirm the final approved Recourse score by selecting the **final Individual recourse rating** in the dropdown list.

Note: This selection is to change the final Individual Rating, not any specific goal ratings. If you are disapproving the request, the rating selected should be the same rating that the employee current has (Original Individual Rating).

Click **Next** when you are done.

Options

SURFACE LOGISTICS PLANNING SPEC I
Review period: MM/DD/YYYY - MM/DD/YYYY Due by: MM/DD/YYYY

FYXX Individual Ratings Recourse Review

Please complete all fields below.
Approval or submitted final decision of the rating recourse request will be determined by Compensation & Benefits Department and the Deputy Postmaster General and Chief Human Resources Officer.

Evaluator Decision

Select

- Select
- Approve
- Disapprove (Character Limit)

Your justification must thoroughly support your approval or denial of the recourse request.

Comments

Approve recourse request

Character: 25

Confirm the final Individual Recourse Rating. Please note that if you approve the recourse request, you may select an alternate recourse score different from the one the employee requested. For example, if the employee's Individual Rating (Average of All Ratings) is a 3 and the employee requests a Recourse Rating change to a 5, you can leave the employee's Individual Rating at a 3 or change the rating to a 4 or 5. The final Individual Recourse Rating cannot be lower than the employee's Original Individual Recourse Rating.

Select

- Select
- 5- Outstanding
- 4- Exceeds Fully Successful
- 3- Fully Successful
- 2- Merit Successful
- 1- Minimum Successful
- 0- No Rating

Previous **Next**

6. You will see your employee's signature and the date the request was signed at the top.

Review the affirmation, check the **Acknowledgment** checkbox, and then click the **Sign** button. Once your signature has been captured and a date is present, select the **Submit** button.

Options

POST OFFICE STRATEGY SPECIALIST II
Review period: MM/DD/YYYY - MM/DD/YYYY Due by: MM/DD/YYYY

FYXX Individual Rating Recourse Signatures

Overview

- Employee: [Name]
- Final Individual Rating: [Rating]
- Final Recourse Rating: [Rating]
- Final Individual Rating: [Rating]

Sign

Evaluator Ratings Recourse Job Aid



MyHR

This will display a pop-up window confirming your submission and noting that you will not be able to modify once you submit. If you are ready, click the **Submit review** button.

You will receive another pop-up window indicating that you have successfully submitted your employee's Rating Recourse. Click **Return to Review**.

Note: If this is the 1st evaluator approval (direct manager), the request will automatically route to the 2nd evaluator (next higher-level manager) for review.

The values selected by the 1st evaluator will display but can be changed by the 2nd evaluator, if desired.

Once all reviews are completed in Performance Pilot, the Compensation and Benefits Department will review and finalize the rating recourse decisions with the pertinent VP and DPMG/CHRO. When Rating Recourse requests are finalized, all employees who submitted a Rating Recourse will receive an email notification informing them to check Performance Pilot to view the final decision.

If the rating has been changed due to recourse, the new rating will be reflected on the **My Performance Scorecard** section of the **Performance pilot** homepage.

INDIVIDUAL RATING RECURSE (F.Y.)
RATING RECURSE (2nd EVALUATOR)

POST OFFICE STRATEGY SPECIALIST II
Review period: 10/01/2023-09/30/2024 Job by: 10/01/2023

Options

FILTER

Search by Name

Overview

FYXX Individual Rating Recourse Signatures

Save for Later

Previous

Submit

Are you sure you want to submit review for Employee?

You will not be able to modify once you have submitted.
Are you sure you want to submit now?

Cancel

Submit review

✓

You have successfully submitted the Individual Rating (Average of All Ratings) Recourse Submission for

Exit

Return to Review

Support

Check out the [Performance Pilot Job Aid](#) page for additional content!

