



Puerto Rico National Guard



Organizational (Org) Charts

SGT Luz Vazquez

Human Resources Specialist

Classification

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Org Chart: what is it?

- Wire Diagrams vs Org Charts
 - Its not a phone tree
 - Show hierarchy relationship; the line = authority
 - Boxes are positions, not people
 - Populate with info: name, grade, PD #, etc.

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Purpose

- YOUR tool for management of the POSITIONS
 - People move, the positions do not
 - Shows chain of command
 - Provides a picture of the work environment

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Org Chart tools

- Power Point
- Visio
- Any drawing program
- Smart Art – Microsoft

(Pull up Power Point on Desktop)

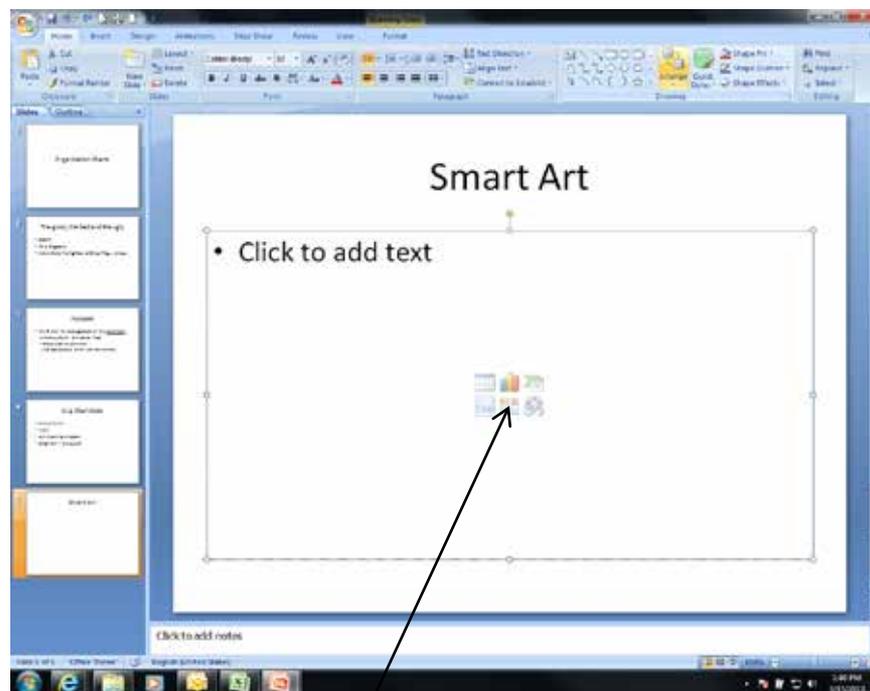
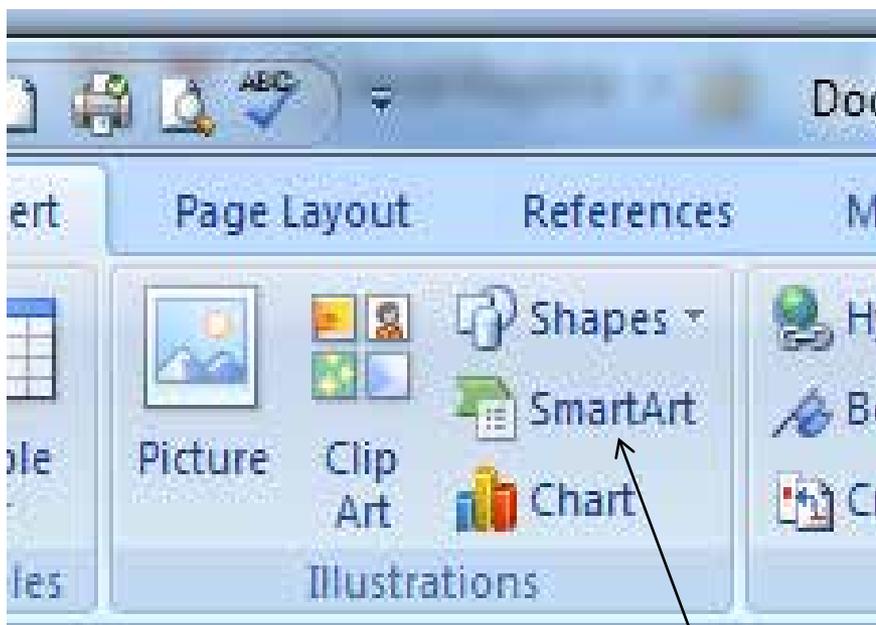
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Smart Art



There are several places to find it in Microsoft Programs. Click on "Insert" then "smart art" or look for the symbol.

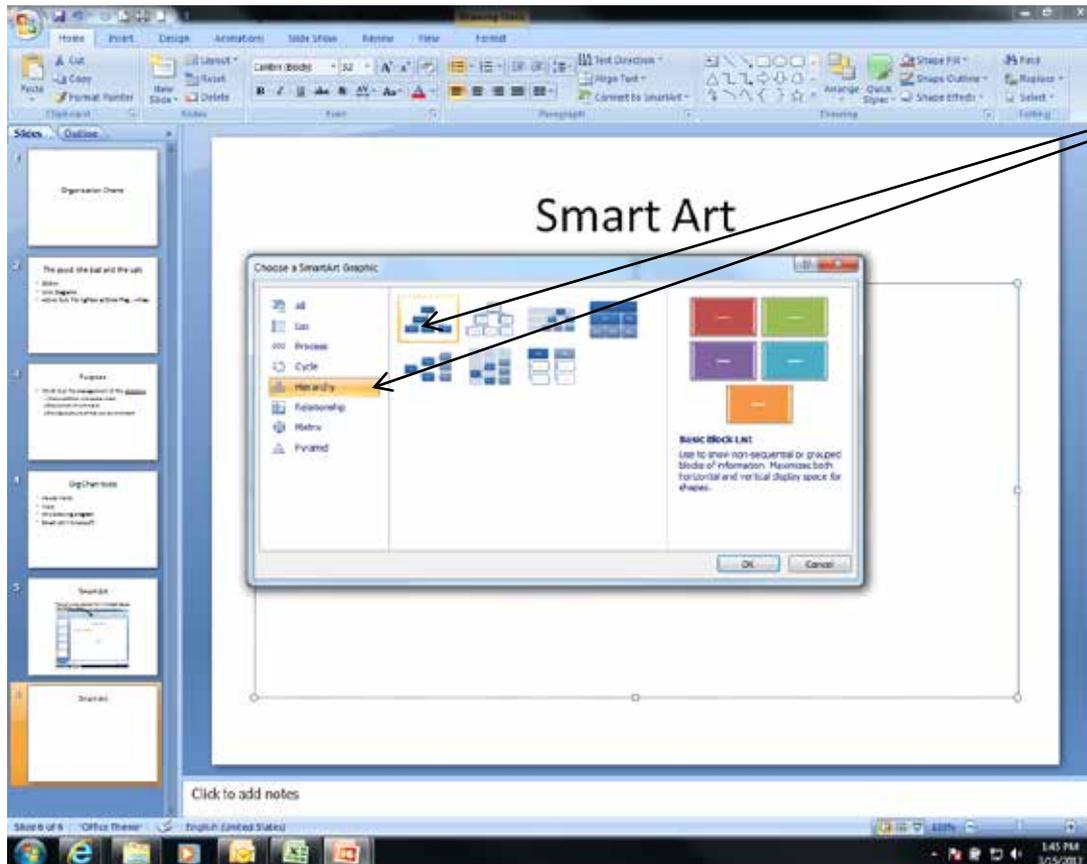
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Smart Art



Select "Hierarchy" then
"Organizational Chart"
Click OK

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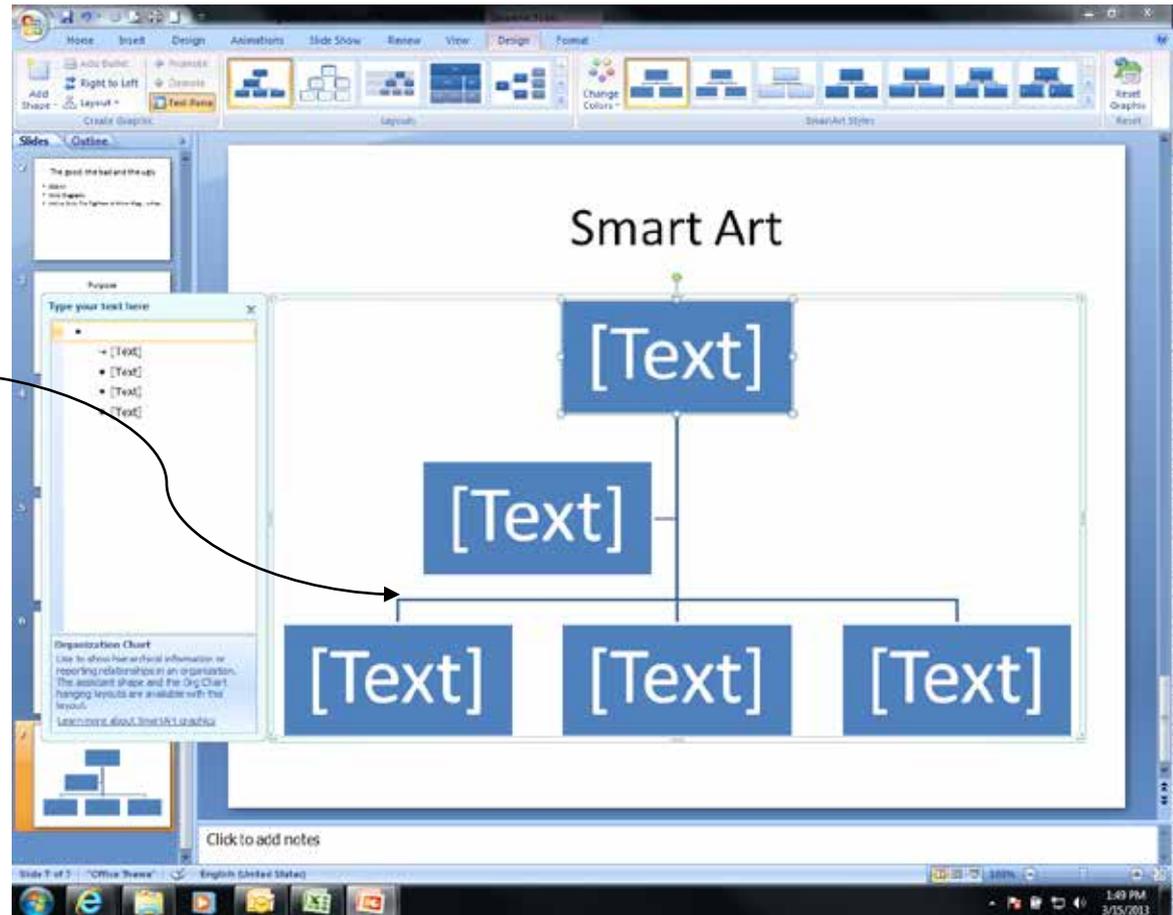


Enter position information where it says [Text]

- The text will automatically adjust to fit the size of the box
- The connector lines will adjust themselves too

Minimum Recommended:

- Title of the position
- AGR, TECH, DSG, or Civilian (contract or state worker)
- Series / Grade of the Position (ex. GS-0203-18)



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- Text is accessed in the box on the left
 - In order to make changes, there are two tabs that appear for Design and Formatting
 - The “Add Shape” button is where you Add positions
 - The “Layout” button lets you change from a standard to a hanging structure
- (Demonstration)

The screenshot shows the Microsoft PowerPoint interface with the Smart Art tool open. The ribbon at the top has 'Design' and 'Format' tabs highlighted with red boxes. On the left side, the 'Add Shape' button is circled in red, and the 'Layout' button is also highlighted with a red box. A text entry box is open, showing a list of text entries: 'Human Resources Officer Technician GS-0203-18', followed by four '[Text]' placeholders. The main area displays an organization chart with a top box containing the text 'Human Resources Officer Technician GS-0203-18' and three boxes below it, each containing '[Text]'. The status bar at the bottom indicates 'Slide 8 of 1', 'Office Theme', and 'English (United States)'. The system tray shows the time as 1:06 PM on 3/15/2013.

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- Right click and select add shape
- Add shape below for subordinates and add shape before or after to add the same level position
- For supervisory positions add shapes before and after in the same line of hierarchy

Click to add title

[Text]

[Text]

[Text] [Text]

Click to add notes

Slide 9 of 12 PR Master Slide Template English (United States)

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Smart Art

- Key tip: use the “back” button
 - Under the “Format” tab you can:
 - Change the color, outline, effect, style, etc...
 - Make changes to the text and the box
 - Under the “Design” tab you can:
 - Add positions, promote and demote, change the layout, and reset the graphic... (use the back button if resetting was not intended...)
- “Our People, Our Families, Our Guard”**



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Smart Art

- It is Easy to use
- Standard on all the systems in the military
- Savable
- Can be updated with changes
- It is YOUR tool!

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QUESTIONS?

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Recruitment and Placement

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Statutory & Regulatory References for Recruiting and Placement

- 5 USC 2301 - Merit System Principles
- 5 USC 2303 - Prohibited Personnel Practices
- NGB Technician Personnel Regulations (TPR) - 300 series
- Code of Federal Regulation (CFR) - 300 series
- Local Merit Placement Plan
- Bargaining Unit Agreements



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MERIT SYSTEM PRINCIPLES & PROHIBITED PERSONNEL PRACTICES

**Legal Obligations
Ethical Obligations
Common Sense**



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Merit Placement

- The Merit Placement Plan and the Negotiated Agreement determine the procedures used to consider Internal and External candidates for competitive placements



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Merit Placement Plan

Management has the right to:

- Select or not select from properly referred/best-qualified applicants
- Select candidates from any appropriate source most likely to best meet mission objectives



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Supervisory Responsibilities

- Identify the knowledge and skills needed for your organization
- Be aware of budgetary constraints





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Technician Position Descriptions

- Ensure that duties are:
 1. Definitely established and completely understood
 2. Current and accurate
 3. Achieving equal pay for equal work

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Major duties on a PD

- A major duty consists of work that is:
 1. Regular and recurring
 2. Occupies a significant percentage of the position's duty time
 3. Requires substantially different and higher qualification requirements from the rest of the job

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Supervisory Responsibilities

Anticipate vacancies and personnel actions to support the transformation of the National Guard:

Promotions

Reassignments

Details

Retirements

Resignations

Separations/Terminations



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Supervisory Responsibilities

- Determine how to fill positions
 - Permanent, temporary or indefinite
 - Full-time
 - Enlisted, Officer, Warrant
- Areas of Consideration
- Determine the potential applicant and recruitment sources *prior* to announcement
- Complete a Standard Form 52
- Send to HRO or Wing Liaison



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Looking for a vacancy

www.pr.ngb.army.mil/hro

www.usajobs.gov

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Advertisement

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USAJOBS
WORKING FOR AMERICA

Keywords: Location: [Advanced Search](#)

You are currently searching on:
Keyword: Iowa national guard [Reset](#)

Did you mean: Iowa National Guard

1 to 35 of 35 results Sort By: Relevance

Flight Operations Specialist [Save Job](#) | [More Like This](#)

...serious emergencies. Join our **Iowa National Guard** team and serve your nation, **Iowa** and your community; **303A ARMY NATIONAL GUARD** THIS POSITION IS RESTRICTED...CURRENT MILITARY MEMBERS OF THE **IOWA ARMY NATIONAL GUARD** LOCATION: AASF # 3, Davenport...

Salary:	843,389.00 - 856,406.00 / Per Year	Department:	Department of the Army
Series & Grade:	GS-2102-08/08	Agency:	Army National Guard Units (Title 32)
Location(s):	Davenport, Iowa	Position Info:	Full Time - Excepted Service Permanent
Open Period:	7/15/2014 to 7/29/2014	Who May Apply:	Restricted to current military members of the Iowa Army National Guard
Announcement:	IA14-137 (1167298)		
Number:			

Training Technician-Training Readiness [Save Job](#) | [More Like This](#)

...serious emergencies. Join our **Iowa National Guard** team and serve your nation, **Iowa** and your community; **109A ARMY NATIONAL GUARD** THIS POSITION IS RESTRICTED...TECHNICIANS EMPLOYED WITH THE **IOWA ARMY NATIONAL GUARD** LOCATION: DCSOPD-G3, JOHNSTON...

Salary:	647,603.00 - 662,367.00 / Per Year	Department:	Department of the Army
Series & Grade:	GS-1702-09/09	Agency:	Army National Guard Units (Title 32)
Location(s):	Johnston, Iowa	Position Info:	Full Time - Excepted Service Permanent
Open Period:	7/15/2014 to 7/29/2014	Who May Apply:	This position is restricted to current on board permanent (tenure 1 or 2.) techn...
Announcement:	IA14-129 (1167342)		
Number:			

Intelligence Operations Specialist (Intelligence Analyst) [Save Job](#) | [More Like This](#)

...serious emergencies. Join our **Iowa National Guard** team and serve your nation, **Iowa** and your community; **303A 419 NATIONAL GUARD** THIS POSITION IS RESTRICTED...THE 122ND FW, DES MOINES, **IOWA AIR NATIONAL GUARD** LOCATION: 122ND FW, Des Moines...

Salary:	\$38,179.00 - \$75,376.00 / Per Year	Department:	Department of the Air Force
Series & Grade:	GS-0132-07/13	Agency:	Air National Guard Units (Title 32)
Location(s):	Des Moines, Iowa	Position Info:	Full Time - Excepted Service Permanent

Refine Your Results By:

Who May Apply:

- U.S. Citizens
- Federal Employees

- [Salary](#)
- [Pay Grade](#)
- [Job Categories](#)
- [Location](#)
- [Department and Agency](#)
- [Work Type](#)
- [Posting Date](#)
- [Exclude These](#)

You can also:

- [Save This Search](#)
- [Get RSS Feed](#)
- [Edit Search Criteria](#)



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Types of Appointments

Overview

Duties

Qualifications & Evaluations

Benefits & Other Info

How to Apply



NATIONAL GUARD 

Job Title: Aircraft Mechanic

Department: Department of the Air Force

Agency: Air National Guard Units (Title 32)

Job Announcement Number: IA14-018 (1043411)

- Position Information:
 - **Excepted** (Permanent, Indefinite, Temporary) **Title 32**
- Who May Apply (Areas of Consideration):
 - 1: Restricted to **Current On-Board Technicians**
 - 2: **Statewide** (Open to current members of the PRNG)*
 - 3: Open to those willing and eligible to immediately become a member of the PRNG
- Open Period: 15 days

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Overview

Overview

Duties

Qualifications & Evaluations

Benefits & Other Info

How to Apply

TRAVEL REQUIRED

- Occasional Travel
- Training

RELOCATION AUTHORIZED

- No

KEY REQUIREMENTS

- Compatibility: AFSC 2A3XX, 2A5XX
- Type of Employment: Enlisted

- Compatibility Criteria and Emphasis
 - Agency (Army or Air)
 - Military Skill Specialty (MOS/AFSC)
 - Unit of Assignment (within the state)
 - Rank (Officer, Warrant Officer, Enlisted)

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Compatibility

- The fundamental precept of the National Guard Military Technician Program is all Dual Status technicians are required to be members of the National Guard and must have a compatible military assignment
- Compatibility is a statutory requirement [32 U.S.C. 709], critical to full-time management



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Compatibility is defined as:

- The condition in which the military technicians are assigned to positions in the proper military grades (officer, warrant officer or enlisted) and militarily assigned to the military units (MTOE/TDA/UMDA) that employs them, or to a unit that support other military units



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Compatibility

- Technicians are required to hold particular MOS or AFSC (per the MTOE/TDA/UMDA) for assignment to compatible military positions
- Technicians are responsible for obtaining and maintaining the military skill sets required for the technician positions
- If you as a Supervisor hire someone that is not AFSC/MOS qualified, you will need to send a get well plan with your selection
- Military rank inversion is not permitted



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Incompatible Conditions

- Loss of military membership = separation
- Failure to meet a requirement of the position
- Reference: Technician Personnel Regulation (TPR) 715 -
"Voluntary & Non-disciplinary Actions"



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Request for an “exception” to compatibility or assignment criteria:

- Must include a solid justification as to why current criteria is insufficient to meet the units needs
- Must be comprehensive enough to allow TAG to understand the rationale for proposed action
- Must include recommendation or proposed resolution
- See Compatibility Guide for clarification



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Grade Inversion is
NOT permitted



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Other Requirements

Overview

Duties

Qualifications & Evaluations

Benefits & Other Info

How to Apply

- Other Key Requirements
 - Driver's License
 - Shift Work
 - Potential Pre-employment physical or medical screening
 - Completion of NGB prescribed courses
 - Enlistment Cash Bonuses may be affected

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Qualifications

Overview

Duties

Qualifications & Evaluations

Benefits & Other Info

How to Apply

- Basic Qualifications
 - General Experience
 - Specialized Experience
 - Must be addressed in resume
 - Experience must demonstrate HOW



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Evaluations

Overview

Duties

Qualifications & Evaluations

Benefits & Other Info

How to Apply

- Application
 - Occupational Questionnaire
 - Resume
 - Transcript (if credit is desired)
- Evaluation against Basic Qualifications
 - **Demonstrates** the required specialized experience
 - Required length of experience
 - Matched complexity for the grade applying for
 - Not based on rank or previously held grades
 - Not based on Job Title



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Supervisory Responsibilities

Initiate the selection process:

- Conduct interviews as negotiated in our Collective Bargaining Agreement (CBA) or as defined in the State Merit Promotion and Placement Plan
- Apply consistent interview techniques with all candidates



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Interviewing Process

- Know the Position Description (PD)/Job
- Set up the interviews
- Establish interview questions & answers
 - Prepare Introduction/closing
 - Ask job-related questions only
 - Do not ask discriminating “EEO” type questions
 - Be prepared for follow-up questions
- Select the applicant(s) that demonstrates the most potential for success in the position
- Confidentiality



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INTERVIEWING EXERCISE

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Order of Events

1. Vacancy Announced
 - *Supervisor Notified with a link to the vacancy*
2. Applicant Applies Online
 - *Applicant receives Acknowledgment e-mail through USA Jobs*
3. Vacancy Closes
 - *Staffer reviews all applications*
4. Referral sent to Supervisor
 - *Supervisor is notified*
 - *Applicants are notified of qualification or non-qualification*
5. Staffer Reviews the Packet
 - *Non-Selectees notified via automated e-mail*
 - *Selectee and Supervisor notified via e-mail*

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Questions?

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TRAINING & DEVELOPMENT

SFC ANGEL L. MELENDEZ
HUMAN RESOURCES DEVELOPMENT SPECIALIST
(787) 289-1400 Ext 1217

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Training & Development

Individual Development Plan (IDP)

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Training & Development Individual Development Plan

Individual Development Planning (IDP) is a process for identifying work experience, training and other activities that contribute to improved job performance and self development.

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Training & Development IDP

- Supervisors and employees must work together to develop an Individual development plan (IDP) to describe the training, knowledge and skills required to qualify for the target level of the position
- The duration is for two years or five years
- The supervisor should schedule periodic career counseling sessions with the employee
- The ideal individual development plan should be realistic

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TRAINING & DEVELOPMENT IDP

SUPERVISOR'S ROLE

- The Supervisor is in a “key” position to support the employee development by:
 - Giving feedback on his performance
 - Providing the assess for advancement potential and qualifications
 - Scheduling training opportunities
 - Acting as a resource and referral and as a mentor and coach

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TRAINING & DEVELOPMENT IDP

PLANNING AND PREPARATION

- Supervisors and employees must work together to develop an IDP
- Supervisor returns signed IDP to HRO-HRD
- HRO reviews and approves OR disapproves: Then IDP continues...
- Supervisor and Employee will reviews and updates IDP

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TRAINING & DEVELOPMENT IDP

- IDPs are recommended for all employees
 - *Employees in new or changed positions
 - * All technicians
- Optional format: NGB Form 650 (sample next slide), memo, chart

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NGB Form 650 pg 1

PRIVACY ACT STATEMENT: Section 4103 of Title 5 of U.S. Code authorizes collection of this information. The Individual Development Plan (IDP) information is used by supervisors, employees, and department managers to plan and/or schedule training, education, or other career development activities relevant to the position. The IDP is a functional tool for both the supervisor and employee. It provides a consistent and continual status of the employee's progress or lack thereof. Position requirements are identified and annotated. This form is used to justify an employee's progress within his/her probationary year. This form is also used to support and justify grade promotions and/or position reassignments. Changes to this IDP, within its Development Objectives are either short term (S/T) or long term (L/T) in nature. The IDP information is for official use only. **Attach additional pages if necessary. On each attached page, annotate the member's data as reflected in Blocks One Through Seven. For each entry, reference the applicable block title for the continued information.**

1. NAME		2. SSN	3. POSITION TITLE		4. PAY PLAN, SERIES, AND GRADE
5. INITIAL/UPDATE		6. PERIOD COVERED		7. LAST UPDATED	
8. DEVELOPMENT OBJECTIVES					
8a. SHORT TERM OBJECTIVES (4-12 MONTHS)			8b. LONG TERM OBJECTIVES (1 YEAR +)		
9. FORMAL TRAINING OBJECTIVES					
9a. COURSE ID	9b. COURSE TITLE	9c. PROVIDER (PRINT NAME)		9d. DATE SCHEDULED OR PROPOSED	9e. DATE COMPLETED
10. FORMAL EDUCATION					
10a. DEGREE	10b. NAME OF PROGRAM	10c. PROVIDER (PRINT NAME)		10d. DATE SCHEDULED OR PROPOSED	10e. DATE COMPLETED
11. ON THE JOB TRAINING (OJT)					
11a. SELF OR GUIDED	11b. NAME OF SYSTEM OR TRAINING ITEM	11c. PROVIDER (PRINT NAME)		11d. DATE SCHEDULED OR PROPOSED	11e. DATE COMPLETED
Supervisor's Printed Name:		Signature:		Date:	
Employee's Printed Name:		Signature:		Date:	
HRO Coordinator/ HRDS Printed Name:		Signature:		Date:	

NGB Form 650

Page 1

UNCLASSIFIED

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TRAINING & DEVELOPMENT IDP

Review:

- The Supervisor is in a “key” position to help and support the employee development
- Supervisor and Employee will develop, reviews and updates IDP
- IDPs are highly recommended for all technicians

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TRAINING & DEVELOPMENT

AUTHORIZATION, AGREEMENT AND CERTIFICATION OF TRAINING

SF 182

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TRAINING & DEVELOPMENT AUTHORIZATION, AGREEMENT AND CERTIFICATION OF TRAINING

- Requests for Technician Training or any event in which travel funds are used will only be accepted on a Standard Form, Authorization, Agreement and Certification of Training (SF 182)
- Technician training request must be submitted in advance
- Training requests (SF 182), will be accepted in hard copy or emailed by the Supervisor
- A Continued Service Agreement (CSA)

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TRAINING & DEVELOPMENT SF 182

AUTHORIZATION, AGREEMENT AND CERTIFICATION OF TRAINING		A. Agency, code agency subelement and submitting office number HRO		B. Request Status <i>(Mark (X) one)</i> <input type="checkbox"/> Resubmission <input checked="" type="checkbox"/> Initial <input type="checkbox"/> Correction <input type="checkbox"/> Cancellation	
Section A - TRAINEE INFORMATION Please read instructions on page 6 before completing this form					
1. Applicant's Name <i>(Last, First, Middle Initial)</i> DOE, JOHN		2. Social Security Number/Federal Employee Number 1234		3. Date of Birth <i>(yyyy-mm-dd)</i> 1977-07-05	
4. Home Address <i>(Number, Street, City, State, ZIP Code)</i> (Optional) ON RECORD		5. Home Telephone (Optional) <i>(Include Area Code)</i>		6. Position Level <i>(Mark (X) one)</i> <input checked="" type="checkbox"/> a. Non-supervisory <input type="checkbox"/> b. Manager <input type="checkbox"/> c. Supervisory <input type="checkbox"/> d. Executive	
7. Organization Mailing Address <i>(Branch-Division/Office/Bureau/Agency)</i> 100 General Esteves St San Juan, PR, 00901		8. Office Telephone <i>(Include Area Code and Extension)</i> YOUR PHONE NUMBER		9. Work Email Address YOUR EMAIL	
10. Position Title YOUR TECH POSITION		11. Does applicant need special accomodation? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		If yes, please describe below	
12. Type of Appointment Permanent		13. Education Level <i>(click link to view codes or go to page 7)</i> 13		14. Pay Plan GS	
		15. Series 0203		16. Grade 09	
				17. Step 4	

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TRAINING & DEVELOPMENT SF 182

Section B - TRAINING COURSE DATA					
1a. Name and Mailing Address of Training Vendor (No., Street, City, State, ZIP Code) Graduate School at Capital Gallery 600 Maryland Ave., S.W. L'Enfant Plaza Metro Stop Washington DC, 20024			1b. Location of Training Site (if same, mark box) <input type="checkbox"/> Mark Center, Washington DC		
			1c. Vendor Telephone Number 1-888-744-4723	1d. Vendor Email Address customersupport@graduateschool.edu	
2a. Course Title Processing Federal Personnel Actions	2b. Course Number Code STAF7010D	1a. Name and Mailing Address of Training Vendor (Number, street, city, state, and ZIP code). 2015-01-26		4. Training End Date (Enter Date as yyyy-mm-dd) 2015-01-30	
5. Training Duty Hours 40	6. Training Non-Duty Hours 0	7. Training Purpose Type (Click link to view codes or go to page 9) 01		8. Training Type Code (Click link to view codes or go to page 9) 01	
9. Training Sub Type Code (Click link to view codes or go to page 9) 05	10. Training Delivery Type Code (Click link to view codes or go to page 12) 01	11. Training Designation Type Code (Click link to view codes or go to page 13) 05	12. Training Credit	13. Training Credit Type Code (Click link to view codes or go to page 13) 03	
14. Training Accreditation Indicator (Check below) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	15. Continued Service Agreement Required Indicator (Check below) <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> N/A	16. Continued Service Agreement Expiration Date (Enter date as yyyy-mm-dd)		17. Training Source Type Code (Click link to view codes or go to page 13) 03	
18. Training Objective			19. AGENCY USE ONLY		

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TRAINING & DEVELOPMENT SF 182

Section C - COSTS AND BILLING INFORMATION					
1. Direct Costs and Appropriation / Fund Chargeable			2. Indirect Costs and Appropriation / Fund Chargeable		
Item	Amount	Appropriation Fund	Item	Amount	Appropriation Fund
a. Tuition and Fees	\$ 1,595.00		a. Travel	\$ 1,924.30	
b. Books & Material Costs	\$		b. Per Diem	\$ 461.50	
c. TOTAL	\$ 1,595.00		c. TOTAL	\$ 2,385.80	
3. Total Training Non-Government Contribution Cost			6. BILLING INSTRUCTIONS (<i>Furnish invoice to</i>):		
4. Document / Purchasing Order / Requisition Number					
5. 8 - Digit Station Symbol (<i>Example - 12-34-5678</i>)					



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Section D - APPROVALS	
1a. Immediate Supervisor - Name and title YOUR SUPERVISOR NAME	
1b. Area Code / Telephone Number YOUR SUPERVISOR PHONE NUMBER	1c. Email Address YOUR SUPERVISOR EMAIL
1d. Signature	1e. Date
2a. Second-line Supervisor - Name and title	
2b. Area Code / Telephone Number	2c. Email Address
2d. Signature	2e. Date
3a. Training Officer - Name and title	
3b. Area Code / Telephone Number	3c. Email Address
3d. Signature	3e. Date
Section E - APPROVALS / CONCURRENCE	
1a. Authorizing Official - Name and title ANGEL L. MELENDEZ, SFC, PRARNG, HRDS	
1b. Area Code / Telephone Number (787) 289-1400 x1217	1c. Email Address angel.l.melendezmorales.mil@mail.mil
1d. Signature <input type="checkbox"/> Approved <input type="checkbox"/> Disapproved	1e. Date
Section F - CERTIFICATION OF TRAINING COMPLETION AND EVALUATION	
1a. Authorizing Official - Name and title Immediate supervisor completes this section after training is completed and submits along with Course Certificate back to HRDS	
1b. Area Code / Telephone Number	1c. Email Address
1d. Signature	1e. Date
<small>TRAINING FACILITY -- Bill should be sent to office indicated in item C5. Please refer to number given in item C4 to assure prompt payment.</small>	

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TRAINING & DEVELOPMENT SF 182

Note: This agreement must be signed by the nominee for Government training that exceeds 80 hours (or such other designated period, less than 80 hours as prescribed by the agency) for which the Government approves payment of training costs prior to the commencement of such training. Nothing contained in this SAMPLE agreement below shall be construed as limiting the authority of an agency to waive, in whole or in part, an obligation of an employee to pay expenses incurred by the Government in connection with the training.

Continued Service Agreement

Employees, who are selected to training for more than a minimum period as prescribed in Title 5 USC 4108 and 5 CFR 410.309, see your supervisor for more information on the internal policies to implement a continued service agreement.

Employees Agreement to Continue in Service

To be completed by applicant:

1. I AGREE that, upon completion of the Government sponsored training described in this authorization, if I receive salary covering the training period, I will serve in the agency three (3) times the length of the training period. If I received no salary during the training period, I agree to serve the agency for a period equal to the length of training, but in no case less than one month. (The length of part-time training is the number of hours spent in class or with the instructor. The length of full-time training is eight hours for each day of training, up to a maximum of 40 hours a week).

NOTE: For the purposes of this agreement the term "agency" refers to the employing organization (such as an Executive Department or Independent Establishment), not to a segment of such organization.

2. If I voluntarily leave the agency before completing the period of service agreed to in item 1 above, I AGREE to reimburse the agency for fees, such as the tuition and related fees, travel, and other special expenses (EXCLUDING SALARY) paid in connection with my training. These fees are reflected in Section C Costs and Billing Information. Note: Additional information about fees and expenses can be found in the Guide to Human Resource Reporting (GHRR).
<http://www.opm.gov/feddata/ghrr/index.asp>
3. I FURTHER AGREE that, if I voluntarily leave the agency to enter the service of another Federal agency or other organization in any branch of the Government before completing the period of service agreed, I will give my organization written notice of at least ten working days during which time a determination concerning reimbursement will be made. If I fail to give this advance notice, I AGREE to pay the full amount of additional expenses 5 U.S.C. 4108 (a) (2) incurred by the Government in this training.

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TRAINING & DEVELOPMENT SF 182

4. I understand that any amount of money which may be due to the agency as a result of any failure on my part to meet the terms of this agreement may be withheld from any monies owed me by the Government, or may be recovered by such other methods as are approved by law.
5. I FURTHER AGREE to obtain approval from my organization and the person responsible for authorizing government training requests of any proposed change in my approved training program involving course and schedule changes, withdrawals or incompletions, and increased costs.
6. I acknowledge that this agreement does not in any way commit the Government to continue my employment. I understand that if there is a transfer of my service obligation to another Federal agency or other organization in any branch of the Government, the agreements will remain in effect until I have completed my obligated service with that other agency or organization.

Period of obligated Service: _____

Employee's Signature: _____

Date: _____

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TRAINING & DEVELOPMENT

DEFENSE TRAVEL SYSTEM (DTS)

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TRAINING & DEVELOPMENT DEFENSE TRAVEL SYSTEM (DTS)

- Request **must** be submitted in advance
- Students **must** attach the SF 182 under "Substantiating Records"
- Students should type comments as:
 - ATRRS Course Number
 - "PEC Funded"

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New Employee Procedures



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Who Does What?

Army and Air Supervisors will confirm their new employee's orientation date and time with an HR Benefits Specialist prior to the new employees start date.

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... It's All in the Email ...

- You will receive an email notification from Staffing with the hire date of the new employee.



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New Employee Orientation

- **When:** First Monday of appt. date (First Monday of the pay period)
- **Location:** PRNG JFHQ's-HRO
- **Time:** 0730
- Temporary Technicians receive a shorter brief while Indefinite, Conditional & Permanent employees receive the new employee brief + a benefits brief on all available benefit programs offered by the agency.

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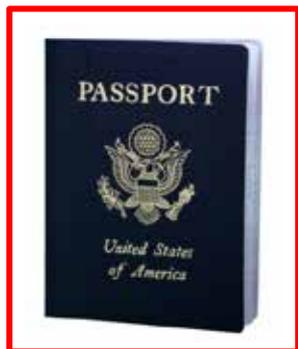
Being Prepared (NEW Procedure)

- Supervisors will **ensure** ALL new hire paperwork is complete **PRIOR** to the employee attending the orientation to include proof of prior Federal Service for Retirement/Leave calculations.
- ID – Driver's License or Passport (for Civilians) and Military ID Card & Social Security Card will be bring on appointment date.

Additional Items Required before appointment date:

ü DD 214's

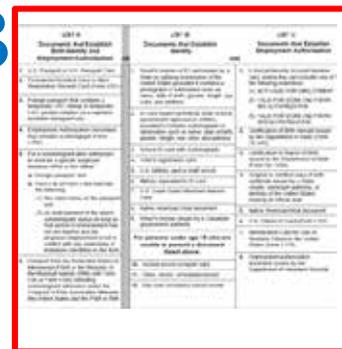
1



2



3



OR

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OR



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After the Orientation

- New Employees will return to their Supervisor with the following:
- **NGB Form 904-1** (*Supervisor's Record of Technician Employment*)
- **Orientation Guide for Newly Appointed Technicians** (*Supervisor will complete Phase II with the employee and return a copy to HRO Benefits*)

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And Then

- Once HRO kicks off the SF50 it will be available for the supervisor and new employee (after 48 hrs) to view/print in **MYBIZ**



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BENEFITS

Indefinite, Conditional & Permanent Employees

- [EBIS](#) (Employee Benefits Information System): a web application that allows you to access general and personal benefits information and conduct **electronic transactions** using a computer. The system contains comprehensive information and personalized benefits statements.
- All benefits eligible employees can enroll in, and make changes to Health Insurance, TSP Contributions and Life Insurance coverage through EBIS (preferred) or HRO.

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LEAVE

Sick Leave

ADVANCED
Sick Leave

Annual Leave

ADVANCED
Annual Leave

Court Leave

Military Leave

5 Days
Presidential
Leave

Funeral Leave
&
Bereavement

Family
Medical
Leave Act
FMLA

Leave
Transfer

*There is NO "Maternity Leave", see Family Medical Leave above for options.

You may contact HRO when you have any questions in regards to an employees leave but feel free to use these links if you wish.

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Puerto Rico National Guard Performance Management Program

NGB TPR 430

**POC:
SGT Michael Rosado**

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Overview

- Objectives
- Performance Plan
- Performance Review
- Performance Appraisal
- Five Rating Level Evaluation Method
- Unacceptable Performance
- Responsibilities

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Objectives

The objectives of the Performance Management Program are well stated in NGB TPR 430, the National Guard Technician Appraisal Program. These objectives are summarized below:

- A. Integrate PRNG, unit, and work center goals and objectives into the performance management process.
- B. Improving organizational effectiveness.
- C. Establish accountability for achieving established goals and objectives.
- D. Establish a record on which to base the following types of personnel actions:
 - (1) Within-grade/Step increases
 - (2) Incentive Awards
 - (3) Promotions
 - (4) Reassignments, Reductions in Grade or Removals

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Objectives (Continued)

- E. Consistently apply Merit Systems Principles.
- F. Involve Technicians in the program development, implementation, and application.
- G. Encourage Technicians to take responsibility for performing to their full potential by:
 - (1) Documenting their objectives for the appraisal plan period
 - (2) Documenting their professional development desires
 - (3) Documenting their long-range career objectives

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Performance Plan, Review and Appraisal

Performance Plan

- Comprised of written job objectives/critical elements (avg 3-5; min 2, max 10)
- Set forth expected performance
- Derived from the technician's position description
- Must be completed within 30 days of technician's assignment to new position
- Mandatory critical element for supervisors



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Performance Plan, Review and Appraisal

Performance Review

- Used to facilitate ongoing communication between technician and supervisor regarding performance
- **NOT** a rating of record and cannot be used to justify a negative personnel action
- Required to initiate a performance improvement plan
- Required mid year for all technicians
- Documented using the PAA



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Performance Plan, Review and Appraisal

Performance Appraisal

- The only performance record (rating of record)
- Used to justify performance awards and other personnel actions
- The only performance record that can be used to justify a negative personnel action (IAW 5 CFR 430)
- Minimum 120 day rating period
- Standard appraisal cycle for PRNG: 1 JAN – 31 DEC
- Documented using the PAA



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Performance Plan, Review and Appraisal

Five Rating Level Evaluation Method

The five rating level evaluation method is used to provide consistency in describing ratings of record and as a reference point for applying other related regulations and personnel actions.

The five rating levels are:

- 5 – Outstanding
- 4 – Excellent
- 3 – Fully Successful
- 2 – Marginal
- 1 - Unacceptable



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Performance Plan, Review and Appraisal

- Below Fully Successful/Unacceptable Performance
- Performance Improvement Plans
- Appeal Process

CONSULT WITH HRO



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Employee's Responsibilities

Employees are encouraged to:

- Participate in the development of job objectives/critical elements
- Identify and record their accomplishments
- Participate in interim reviews and the end-of-year assessments, including the self-assessment
- Understand the link between their performance expectations, conduct, and organization mission and goals

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Rater's Responsibilities

- Develop critical elements aligned to mission goals and objectives
- Communicate performance expectations to employees and hold them accountable for achieving them
- Provide employee feedback—at least one interim review
- Foster and reward excellent performance
- Address poor performance
- Make meaningful performance distinctions among employees

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Higher Level Reviewer Responsibilities

- Be involved in the performance management process throughout the rating period
- Ensure organizational goals are communicated to subordinate supervisors and employees
- Ensure equitable and consistent application of, and compliance with, performance management requirements by all subordinate raters

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Questions?



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ACCESSING



IN DCPDS

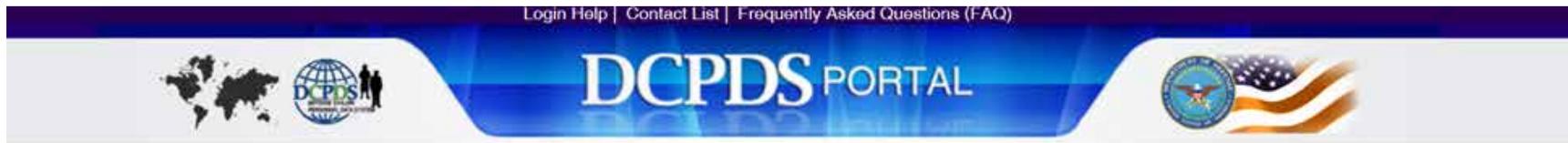
<https://compo.dcpds.cpms.osd.mil>

MSgt David Morales
Human Resources Specialist
Information Systems
email:david.morales21.mil@mail.mil

This briefing is
UNCLASSIFIED
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News and Information

Last updated January 12, 2015
13:00 CDT

Introducing MyBiz+

MyBiz+ is now available.

MyBiz+ provide detailed inform

We encourage Your feedback

Subsequent rel

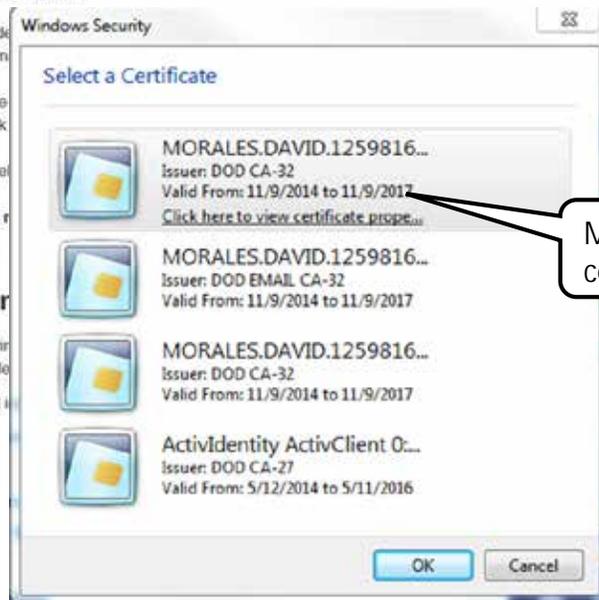
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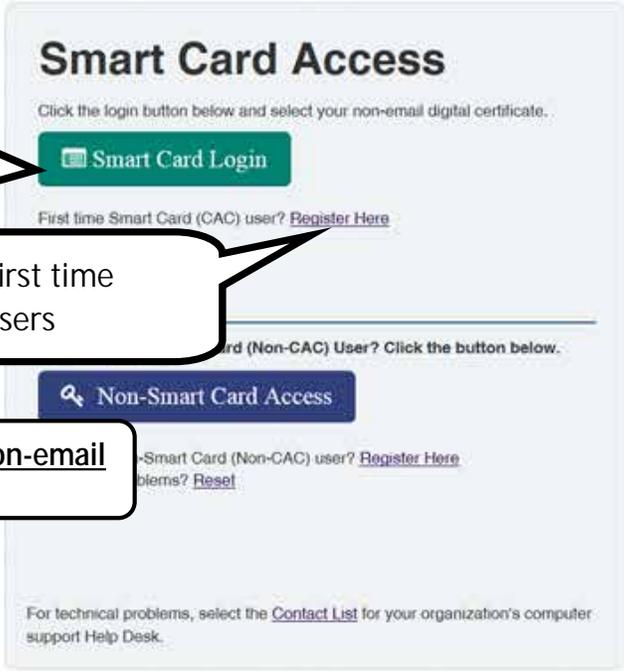
For additional i



Previously registered

First time users

Must use non-email certificate



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The screenshot shows the DCPDS PORTAL interface. At the top, there is a navigation bar with the DCPDS logo and the text "DCPDS PORTAL". Below this, the user is logged in as "ARZON CINTRON.ANTONIO". The main heading is "DCPDS Smart Card Registration".

Instructions for registration are provided: "Enter your SSN/LN Employee ID Number and select the 'Register' button to register your Smart Card. Select the 'Cancel' button to return to the DCPDS Portal Page." A callout box points to the "Register" button, stating: "First time user **MUST** register using their **SSAN with DASHES**".

Below the registration instructions, there are two input fields for the SSN/LN Employee ID Number and a "Confirm SSN/LN Employee ID Number" field. The "Register" button is highlighted with a green circle.

There is also a "Smart Card (CAC) Re-Registration" section with a "Re-Register" button.

On the right side, a "Privacy Act Statement" is visible, detailing the authorities and purposes of the data collection.

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The screenshot shows the DCPDS PORTAL interface. At the top, there is a purple header with the text "DCPDS PORTAL" and a globe icon. Below the header, there is a navigation bar with the text "My Application/Database" and a link "Add Additional Application/Databases" which is circled in black. Below the navigation bar, there is a section titled "Choose your Path" with a horizontal line. Underneath, there is a paragraph of text: "To link your newly created DCPDS Portal account to your existing application/databases. Click the **Add Additional Application/Databases** link above." At the bottom, there is a security notice: "To protect your personal information, log out of your DCPDS Portal session by selecting the 'Logout' button." followed by a red "Logout" button with a lock icon.



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[Application/Database](#) Add Additional Application/Databases

HR Region Associations

**** Important **** You must complete and submit this information to finalize the Registration process. Usernames and SSN/LN Employee ID Numbers are masked as an additional security measure for your personal information.

Use your **HR/MyBiz/MyWorkplace** log in screen "User Name". Use hyphens in the Username.

Username:

Confirm Username:

CSU User? Click the button below.

Privacy Act Statement

Authorities: 5 USC 301, Department Regulations; Title 5, USC Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; and

Once you have successfully registered your CAC to the DCPDS Portal, you will then need to register with the MyBiz + data server. You will again enter your SSAN with DASHES.

Disclosure: Voluntary. Failure to provide the requested information will result in a delay or termination of your request. If your request is terminated, you will not be able to view and verify your data and you will not be able to update your data via this website.

To protect your personal information, log out of your DCPDS Portal session by selecting the **Logout** button.



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Menu Bar

Privacy Act Statement

The information you provide to the Defense Civilian Personnel Data System (DCPDS) is covered by the Privacy Act of 1974. For questions regarding your personal information please contact your local Human Resources Office.

Authorities: 5 U.S.C. Chapters 11, 13, 29, 31, 33, 41, 43, 51, 53, 55, 61, 63, 72, 75, 83, and 99; 5 U.S.C. 7201; 10 USC 136; DoD Instruction 1400.25, volumes 1100 and 1401; 29 CFR 1614.601; and E.O.9397.

Principal Purposes: To allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal information.

Routine Uses: None. The DoD 'Blanket Routine Uses' set forth at the beginning of OSD's compilation of systems of records notices apply to this system.

Disclosure: Voluntary. However, failure to provide or update your information may require manual HR processing or the absence of some information.



[Accessibility/Section 508](#) | [Privacy and Security Policy](#) | [System Help Desk Contacts](#)



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MyBiz+ provides improved user experience and HR information on-demand!

Click [here](#) for a brief MyBiz+ overview

Other DCPDS Applications - ★ Favorites - Help - Logout

Notifications

Read / Unread	Title	Start Date
*	Welcome to MyBiz+	11-Feb-2015

* You have 1 unread notifications.

Welcome **JOHN DOE** The information is current as of 11-Feb-2015

Home

★ Provide Feedback

Manage My Views

Key Services

- My Biz
- Request Employment Verification
- Civilian Career Report
- Update Contact Information
- Update Professional Development
- Retrieve SF50

\$ Insurance

Health Insurance:	Federal Employee Health Benefits Special Code (ZZ)
Life Insurance:	Excluded from life insurance coverage by law or reg

\$ Pay

Gross Pay:	1352.00
Net Pay:	1020.90

\$ Leave

Annual Leave Balance:	8.00
Sick Leave Balance:	8.00
Annual Leave Forfeit Balance (Use or Lose):	0

Professional Development

Education:
High school graduate or certificate of equivalency

Training:

Last Personnel Action

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[Manage My Views](#)

Key Services	\$ Insurance	\$ Leave																
My Biz Request Employment Verification Civilian Career Report Update Contact Information Update Professional Development Retrieve SF50	<table border="1"> <tr> <td>Health Insurance:</td> <td>Federal Employee Health Benefits Special Code (ZZ)</td> </tr> <tr> <td>Life Insurance:</td> <td>Excluded from life insurance coverage by law or reg</td> </tr> </table>	Health Insurance:	Federal Employee Health Benefits Special Code (ZZ)	Life Insurance:	Excluded from life insurance coverage by law or reg	<table border="1"> <tr> <td>Annual Leave Balance:</td> <td>8.00</td> </tr> <tr> <td>Sick Leave Balance:</td> <td>8.00</td> </tr> <tr> <td>Annual Leave Forfeit Balance (Use or Lose):</td> <td>0</td> </tr> </table>	Annual Leave Balance:	8.00	Sick Leave Balance:	8.00	Annual Leave Forfeit Balance (Use or Lose):	0						
Health Insurance:	Federal Employee Health Benefits Special Code (ZZ)																	
Life Insurance:	Excluded from life insurance coverage by law or reg																	
Annual Leave Balance:	8.00																	
Sick Leave Balance:	8.00																	
Annual Leave Forfeit Balance (Use or Lose):	0																	
Last Personnel Action	\$ Pay	Professional Development																
<table border="1"> <tr> <td>Type of Action:</td> <td>Gen Adj</td> </tr> <tr> <td>Effective Date:</td> <td>11-Jan-2015</td> </tr> </table>	Type of Action:	Gen Adj	Effective Date:	11-Jan-2015	<table border="1"> <tr> <td>Gross Pay:</td> <td>1352.00</td> </tr> <tr> <td>Net Pay:</td> <td>1020.90</td> </tr> <tr> <td>Pay Period End Date:</td> <td>24-Jan-2015</td> </tr> </table>	Gross Pay:	1352.00	Net Pay:	1020.90	Pay Period End Date:	24-Jan-2015	<table border="1"> <tr> <td>Education:</td> <td>High school graduate or certificate of equivalency</td> </tr> <tr> <td>Training:</td> <td>No Training Available</td> </tr> <tr> <td>Certification/Licenses:</td> <td>No Certificates/Licenses Available</td> </tr> </table>	Education:	High school graduate or certificate of equivalency	Training:	No Training Available	Certification/Licenses:	No Certificates/Licenses Available
Type of Action:	Gen Adj																	
Effective Date:	11-Jan-2015																	
Gross Pay:	1352.00																	
Net Pay:	1020.90																	
Pay Period End Date:	24-Jan-2015																	
Education:	High school graduate or certificate of equivalency																	
Training:	No Training Available																	
Certification/Licenses:	No Certificates/Licenses Available																	

Detail Pages


 Personal


 Pay, Leave and Benefits


 Professional Development


 Position


 Performance


 Reports

Accessibility/Section 508 | Privacy and Security Policy | System Help Desk Contacts

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MyBiz+ Other DCPDS Applications - ★ Favorites - Help - Logout

Employee: **JOHN DOE** Supervisor: **JOHN DOE** Organization: **JOHN DOE**

Home / Position / SF50 ⌂ \$ ↻ ⌂

External SF50 Personnel Action History

Fetches From	Effective Date	First Personnel Action	Second Personnel Action	Action
No records found.				

[Accessibility/Section 508](#) | [Privacy and Security Policy](#) | [System Help Desk Contacts](#)

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Please click here to retrieve SF 50's

MyBiz+ Other DCPDS Applications - Favorites - Help - Logout

Employee: JOHN DOE Supervisor: JOHN DOE Organization: JOHN DOE

Home / Position / SF50 Home \$ Refresh Print

Navy	Air Force	DFAS	Army	NGB	DLA	BBG
!	!	!	!	✔	!	!

External SF50 Personnel Action History

Fetches From	Effective Date	First Personnel Action	Second Personnel Action	Action
No records found.				

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MyBiz+ Other DCPDS Applications ▾ ★ Favorites ▾ ⓘ Help ▾ Logout

Employee: **JOHN DOE** Supervisor: **JOHN DOE** Organization: **JOHN DOE**

Home / Position 👤 \$ 🔄 📄

Expand an additional section on page

- Appointment
- Position
- Position Additional Information
- Language Details
- Position Tracking
- Position Military to Civilian Conversion
- Career Program/Field
- **SF50 Personnel Action History**

Please click here to populate SF 50's on data base

The following section displays detailed personnel information. Note: For appropriated employees, only those Personnel Notifications processed on or after 23 Sept 2007 are available for viewing. For non-appropriated fund and local national employees only those Personnel Notifications processed on or after 23 March 2008 are available for viewing.

Effective Date	First Personnel Action	Second Personnel Action	Action
11-Jan-2015	General Pay Adjustment		View/Print SF50
28-Dec-2014	Excepted Appointment Not To Exceed (date)		View/Print SF50

External SF50s

[Accessibility/Section 508](#) | [Privacy and Security Policy](#) | [System Help Desk Contacts](#)

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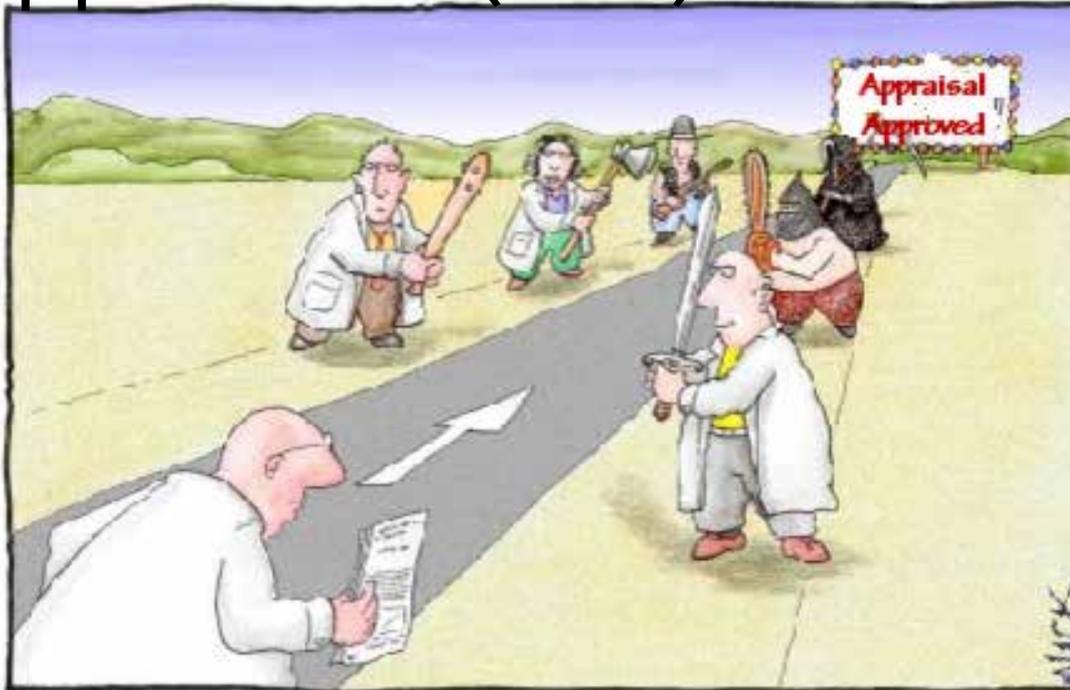
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Performance Appraisal Application (PAA) Overview



Most appraisers regarded the new streamlined appraisal-review process as "quite an improvement."

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What is PAA?

- The Performance Appraisal Application (PAA) is a web-based tool accessed via MyBiz+ for employees and for supervisors, that supports the performance management program.
- Reference NGB TPR 430 & OR TPR 430.

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How to Access PAA

<https://compo.dcpds.cpms.osd.mil/>

- Navigate to the DCPDS portal and login

**Need Help
or Resources**

Contact Human Resources
503-584-3975

- Select, NBG region, on the My Application/ Database tab

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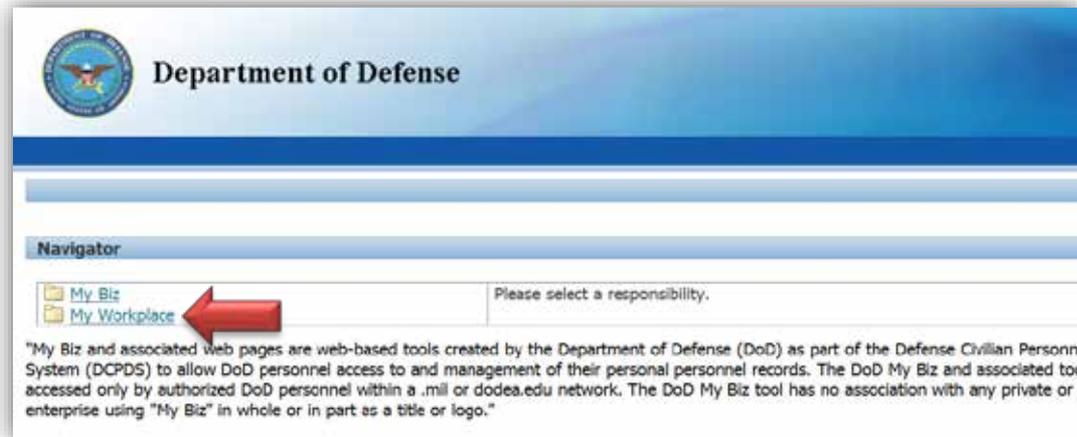


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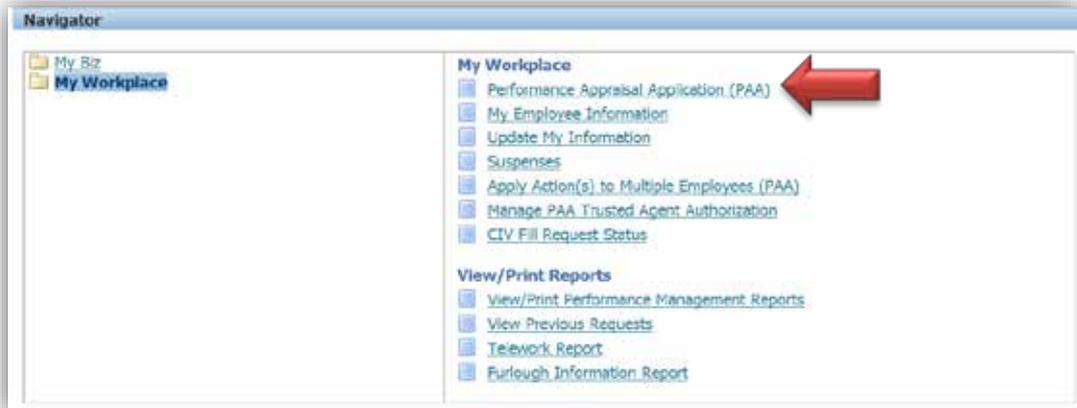


How to Access PAA (continued)

- Select, My Workplace



- Select, Performance Appraisal Application (PAA)



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PAA General Information

THE MAIN PAGE

The
Main
Page

Performance Appraisal Application (PAA) Version 3.0

ICE My Biz ICE PAA V3 Home Logout Help

PAA Main Page Provide Guest Feedback

Rating Official/Higher Level Reviewer

Performance Appraisal Application Main Page

[Need Help?](#)

Warning: The Performance Appraisal Application is designated for sensitive unclassified personnel information only. Do NOT enter classified information in this system. Unauthorized release of classified information is a violation of law and may lead to prosecution.

From the Main Page, you can create, update and view employee Performance Plans; change the Rating Official and/or Higher Level Reviewer; view and print part or an entire plan after it is created; close a plan and track the status of a plan.

You can also search for completed plans by selecting the "Show Completed Plans/Appraisals" link located at the bottom of this page.

To create a Performance Plan:

- Select 'Choose a Plan Type'
- Select 'Appraisal Plan Type'
- Select the 'Go' button

To complete other actions described above:

- Select an option from the Action column
- Select the 'Go' button

Important: To become familiar with the columns, select the "Need Help?" link.

Plans/Appraisals In Progress

TIP Only Employees that have a plan in progress are listed below.

Show Me: All Appraisals Appraisal Year: ALL

Create New Plan

--Choose a Plan Type-- Go

Records Displayed: 10

Employee Name	Current Owner	Rating Official Name	Appraisal Year	Appraisal ID	Plan Approval Date	Type	Plan Status	Current PAA Status	Action
NG Gannett, Billy D	NG Leichter, Rory O	NG Leichter, Rory O	2013	214		NG	Pending	Plan in Progress	Update Go

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PAA General Information

TAB SYSTEM

Progressive
tab
system



The bottom tabs are dependent on the tab that is selected in the upper row.

Progressive: Some of the upper tabs will not be visible until the Plan tab has been fully created.

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PAA General Information

THE THREE LEVELS

The three levels of review



PAA can help the Rating Official document communication

- NOTIFICATION
- FEEDBACK
- ACKNOWLEDGMENT

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PAA General Information

TRACK PROGRESS

The
Track Progress
button

Plan	
Drafted	<input checked="" type="checkbox"/>
Reviewed by Higher Level Reviewer	<input checked="" type="checkbox"/>
Approved	<input checked="" type="checkbox"/>
Acknowledged by Employee	<input checked="" type="checkbox"/>
Interim Review	
Employee - Self-Assessment	<input type="checkbox"/>
Rating Official - Assessment	<input checked="" type="checkbox"/>
Reviewed by Higher Level Review - If Required	<input checked="" type="checkbox"/>
Communicated to Employee by Rating Official	<input checked="" type="checkbox"/>
Acknowledged by Employee	<input type="checkbox"/>
Appraisal	
Employee - Self-Assessment	<input type="checkbox"/>
Rating Official - Assessment	<input checked="" type="checkbox"/>
Higher Level Reviewer Approved	<input checked="" type="checkbox"/>
Communicated to Employee by Rating Official	<input checked="" type="checkbox"/>

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PAA General Information PERFORMANCE PLAN

- Indicate how the employee helps the mission

- Add job objectives (min of 2, max of 10)

- Communicate the plan for approval & acknowledgment

Job Objectives

This screen allows you to add new Job Objectives, update pending Job Objectives if you have ownership of the Performance Plan, and view approved Job Objectives. [Need Help?](#)

- To add a new Job Objective, select the 'Add Job Objective' button.
- To update a Job Objective, select the 'Update' button under the Action column.
- To view an existing Job Objective, select the 'View' button under the Action column.
- Update the Job Objective weights, if appropriate.

TIP: Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned optional weights must equal a total of 100%.

Details	Number	Title	Status	Weight % (Optional)	Action
No results found.					

[Add Job Objective](#) [Delete](#) [<PREVIOUS](#) [NEXT>](#)

Approvals & Acknowledgments

This screen provides information regarding the status of your employee's performance plan.

- Select the 'Start' button to complete a step.
- Select 'Show' to see detailed information about an approval (Date, method of review, etc.).

Show All Details | Hide All Details

Details	Tasks	Status	Action
Show	Step 1: Rating Official - Request or Document higher level review	Not Started	Start
Show	Step 2: Higher Level - Review	Not Started	Step 1 result completed
Show	Step 3: Rating Official - Document Communications to employee	Not Started	Step 2 result completed
Show	Step 4: Rating Official - Document Employee Acknowledgment	Not Started	Step 3 result completed

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PAA EXAMPLE

INTERIM REVIEW

- Allows documentation of performance, mid way through the appraisal cycle
- Documents acknowledgment & acceptance between the three levels
- Does not include an official performance rating

Select	Order	Objective Title	Status	Weights % (Optional)
<input type="checkbox"/>	1	job objective 1	APPROVED	
<input type="checkbox"/>	2	job objective 2	APPROVED	

Sub Objective Text

This describes the first job objective

Employee Self Assessment

Rating Official Assessment



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PAA EXAMPLE

ANNUAL APPRAISAL

Plan Interim Reviews **Annual Appraisal** Reports/Forms Manage Guest Participants

Assessments and Ratings **Rating of Record** Approvals & Acknowledgments

Rating of Record

[Need Help?](#)

This screen allows you to review and update Job Objective ratings. Once you have completed your updates, select the 'Approvals and Acknowledgments' tab to complete the process.

Important Note: Only "Approved" Job Objectives will be used to calculate the rating of record and average score. All "Approved" Job Objectives with assigned weights must equal a total of 100%. All weights, assigned and adjusted, must be a minimum of 10% and displayed in increments of 5.

Job Objective Ratings

Order	ObjectiveTitle	Status	Weight % (Optional)	Adjusted Weight	Rating
1	job objective 1	APPROVED			5
2	job objective 2	APPROVED			5

Rating of Record

Average Score 5.00
Rating of Record 5

- Allows performance feedback (same worksheet as Interim Review) and 5-tier rating
- Documents acknowledgment/acceptance between the three levels

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PAA General Information

REPORTS/FORMS

All levels can view and print approved performance plans and appraisals from the Reports/Forms tab

The screenshot displays the 'Reports/Forms' tab in a web application. A red arrow points to the 'Reports/Forms' tab in the top navigation bar. The main content area shows a list of sections to view/print, with checkboxes for 'Select / Deselect All', 'Relevant Organization Mission/Strategic Goals', 'Job Objectives', 'Job Objectives with Interim Reviews', 'Job Objectives with Closeout Assessments', and 'Job Objectives with Annual Appraisals'. Below this, there is a 'View/Print Form' button and instructions to select the 'View/Print Form' button on Form 430.

The previewed form is titled 'NATIONAL GUARD TECHNICIAN PERFORMANCE APPRAISAL'. It includes fields for 'EMPLOYEE NAME' (NO 1000, Section 8) and 'APPRAISAL YEAR' (2013). The form is divided into several sections:

- PRODUCT ACT STATEMENT**
- 1. AUTHORITY** (U.S.C. Section 430, Performance Management)
- 2. PURPOSES** (This form will be used for performance planning and results reporting documentation as required for the Performance Appraisal)
- 3. ROUTING LOGS** (This form will be used by employees, rating officials, and managers for documentation and communication purposes as required by the Technical Personnel Regulation 430)
- INSTRUCTIONS FOR COMPLETION OF ANNUAL PERFORMANCE APPRAISAL**
- Cover Sheet** (Complete the employee's name and the appraisal year)
- PART A - Administrative Data**
 - Appraisal Period: Enter the start date and end date for the evaluation period. Typically this is the rating cycle start and end date; however, these dates can vary. Also enter the appraisal effective date (usually one day after the close of the rating cycle)
 - Employee Name: Name of the employee (last, first, middle initial)
 - Social Security Number: Enter the last 4 digits of the SSN
 - Position Title: Enter the title of the employee's position as of the appraisal period start date
 - Pay Plan/Occupational Series/Grade/Step: Enter the employee's pay plan, occupational series, grade, and step as of the appraisal period start date
 - Organization: Enter the name of the employee's organization
 - Adjusted Salary: Enter employee's adjusted salary as of the date this form was generated on the appraisal period end date, whichever is earlier
 - Duty Station: Enter the duty station where the employee works
 - RA's Control ID: Enter employee's RA's Code as LUC
- PART B - Performance & Appraisal Documentation**

To be completed by all parties as appropriate to document the establishment of job objectives, interim review, closeout assessment, special purpose and annual assessment as required
- PART C - Performance Rating**

Rating computation based on the job objectives optional weight, and objective rating. Used to determine the employee's final rating of record
- PART D - Relevant Organizational Mission/Strategic Goals**

Organizational Mission and Strategic Goals as they apply to an employee's performance
- PART E - Job Objectives**

Job objectives by which the employee will be evaluated during the appraisal period. Employees must have at least two relevant job objectives. One objective is an employee's self rating official's written assessment of accomplishments for the interim and annual review based on the job objective rating, and interim rating of record. This page should be duplicated for each job objective given. Mark (X) the box to indicate type of appraisal. A note must be completed for the interim and annual assessments and closeout assessments when applicable. Complete a Special Purpose Rating when an employee receives an initial rating of record of 1 and has successfully completed a SOP and has brought the performance level to at least level 2.

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PAA training and Action Guides will be available:

Puerto Rico National Guard HRO Homepage

<https://www.pr.ngb.army.mil/hro/#>

Contact HRO for specific assistance.

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Questions?



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Incentive Awards

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Incentive Awards

- Monetary
- Non-Monetary
- Service

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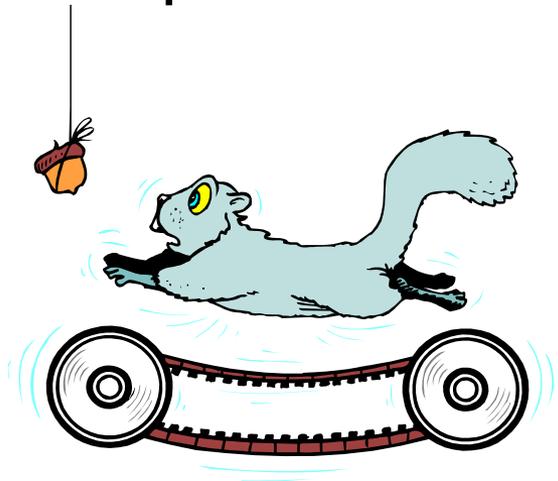


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PURPOSE OF AWARDS

- Motivate
- Increase efficiency, productivity & creativity
- Recognize/reward performance & contributions



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MONETARY AWARDS

Quality Step Increase (QSI) (General Schedule (GS) only):

- Only use when you expect performance to continue

Sustained Superior Performance (SSP):

- Exceeds position's requirements
- Performance maintained at least 6 months
- Generally in the range of \$250-\$2500

ALL OF THE ABOVE ARE SUBMITTED ON NGB FORM 32 AND **MUST HAVE CURRENT APPRAISAL** ON FILE OR BE SUBMITTED WITH CURRENT APPRAISAL

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NON-MONETARY AWARDS



Time-Off Award:

- Up to 40 hrs per contribution
- Maximum of 80 hrs per leave year (JAN-DEC)
- Up to 9 hrs with Supervisor approval
- Up to 27 hrs with Directorate approval
- 27+ requires approval from the Chief or Director of Staff

Length of Service Award:

- Awarded by the HRO to Federal Technicians for distinguished service
- Eligible after 10 years of service and awarded in 5 year increments

Honorary Awards:

- Letters of Appreciation or Commendation

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PAYMENT OF AWARDS

- Monetary awards will be paid from Federal Funds (Tech Pay)
- Paid as early as possible after approval
- Taxable Income

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SUPERVISORY RESPONSIBILITIES

- Match type of recognition to situation
- Ensure timely, appropriate presentation
- Exercise care in considering recognition



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Questions about Incentive Awards?

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Promotions

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Promotion

- When competition is required
- Non-competitive
- Discretionary



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Competition Is Required

- Permanent promotions
- Time-Limited (temporary) promotions (over 120 days)



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Competition is Not Required

- Promotion due to position upgrades resulting from the application of a new Classification standard *or* correction of a Classification error
- May be appointed, promoted, reassigned, etc. without competition if they have previously held the position being filled



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Competition is Not Required

- If the promotion is a target grade promotion and the original competition clearly established the promotion potential
- The promotion is Temporary Not to Exceed 120 Days



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Competition is Discretionary

- Placement in a position with no higher promotion potential than previously held or competed for
- Re-promotion when demoted without personal cause or at own request



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TECHNICIAN TENURE

- Tenure 1 – Permanent
- Tenure 2 – Permanent-Conditional
– (during one year trial period)
- Tenure 3 – Indefinite
- Tenure 0 – Temporary Not to Exceed (NTE)

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Probation Period

- One year from date of hire
- Supervisor has options for removal of poor performing employee during probation
- Tenure change once probation is complete

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PUERTO RICO NATIONAL GUARD

EQUAL EMPLOYMENT OPPORTUNITY (EEO)

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REFERENCES:

- NGR 690-600 (AR)/NGR (AF) 40-1614 Vol. I
National Guard Civilian Discrimination Complaint System
- NGR (AR) 690-600 NGR (AF) 40-1614 Vol. II
Civilian Discrimination Complaint Processing and Adjudication
- NGR (AR) 690-600 NGR (AF) 40-1614-18 May 2001 Draft
National Guard Civilian Discrimination Complaint System
- US Equal Employment Opportunity Commission (EEOC)



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MARTA CARCANA
COL, PRNG
The Acting Adjutant General

- Policy Memo: 02-15 Equal Employment Opportunity (EEO) Policy
- Policy Memo: 03-15 Equal Opportunity (EO) Policy
- Policy Memo: 05-15 Prevention of Sexual Harassment (POSH) Policy

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WHAT IS EEO?

- Providing equal opportunity in employment prohibiting discrimination based on:
 - Ø race
 - Ø color
 - Ø religion
 - Ø gender (including sexual harassment)
 - Ø national origin
 - Ø age
 - Ø disability

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DISCRIMINATION:

- Any action that unlawfully or unjustly results in unequal treatment of persons or groups based on race, color, gender, national origin, or religion.
- May be expressed as verbal, printed, visual material, signs, symbols, posters, or insignia. The use of these terms constitutes unlawful discrimination.

CONSEQUENCE **PROCESS** **DISCRIMINATION** **DEFINITION**
PREJUDICE **DIFFERENT** **PEOPLE**
HISPANIC **OR** **BROWN** **AND** **BLACK**
ALTHOUGH **OR** **BROWN** **AND** **BLACK**

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“ROOT CAUSES OF DISCRIMINATION”

- We all equally develop and have “Prejudice’s” about individuals or groups.
- The problem with the discrimination occurs when we take “**Action**” on our “Prejudice's”. When this happens we may intentionally or unintentionally demonstrate discriminatory behaviors.

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FACTORS THAT SUPPORT DISCRIMINATION BEHAVIOR:

- **FAMILY** – fosters stereotypes and inaccurate perceptions based on family beliefs or value systems. May be passed down from one generation to another.
- **MEDIA** – known for over-generalizing certain ethnic groups based on stereotyping.
- **FRIENDS** – solidifying inaccurate perceptions or stereotypes of certain groups through shared behavior.

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STRATEGIC TO AVOID DISCRIMINATION:

Don't be quick to judge an individual based on perception, prejudices, and stereotypes.

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WHO APPLY?

- Any National Guard technician, former technician, or applicant for technician employment who believes that he or she has been **illegally discriminated** against due to race, color, religion, gender (including sexual harassment), national origin, age or disability in an employment matter subject to the control of the National Guard, may file an individual complaint of discrimination.

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TWO TYPES OF EEO COMPLAINTS:

- **INFORMAL**: Complainant does not wish to file in writing.
 - Ø Attempt to solve at lowest level
 - Ø Not subject to time suspense
 - Ø Not reportable
- **FORMAL**: Complainant files in writing and completes a discrimination complaint management process Form.
 - Ø No confidentiality
 - Ø Are held to a timeline
 - Ø Reportable to SEEM/NGB

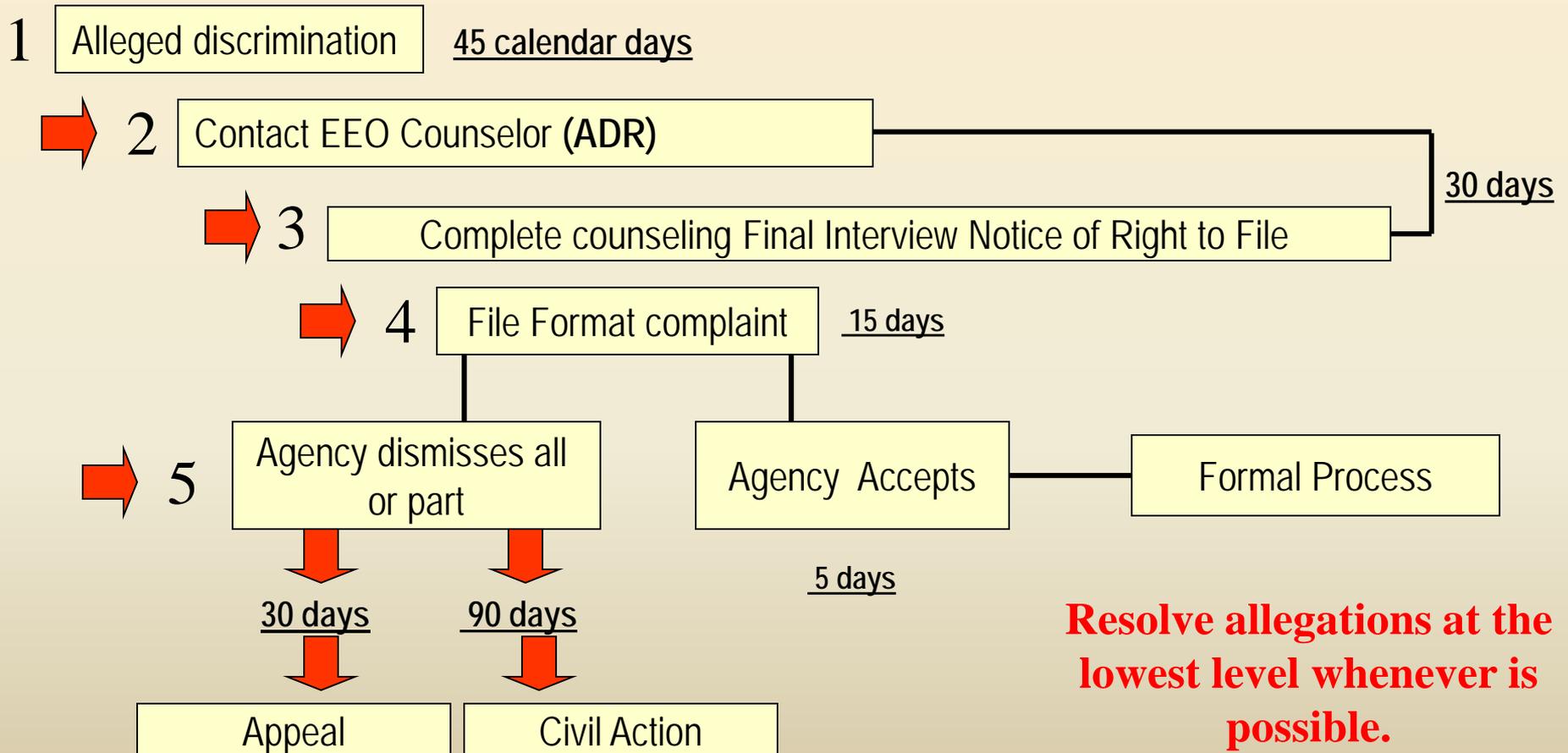
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COMPLAINT PROCEDURES-INFORMAL

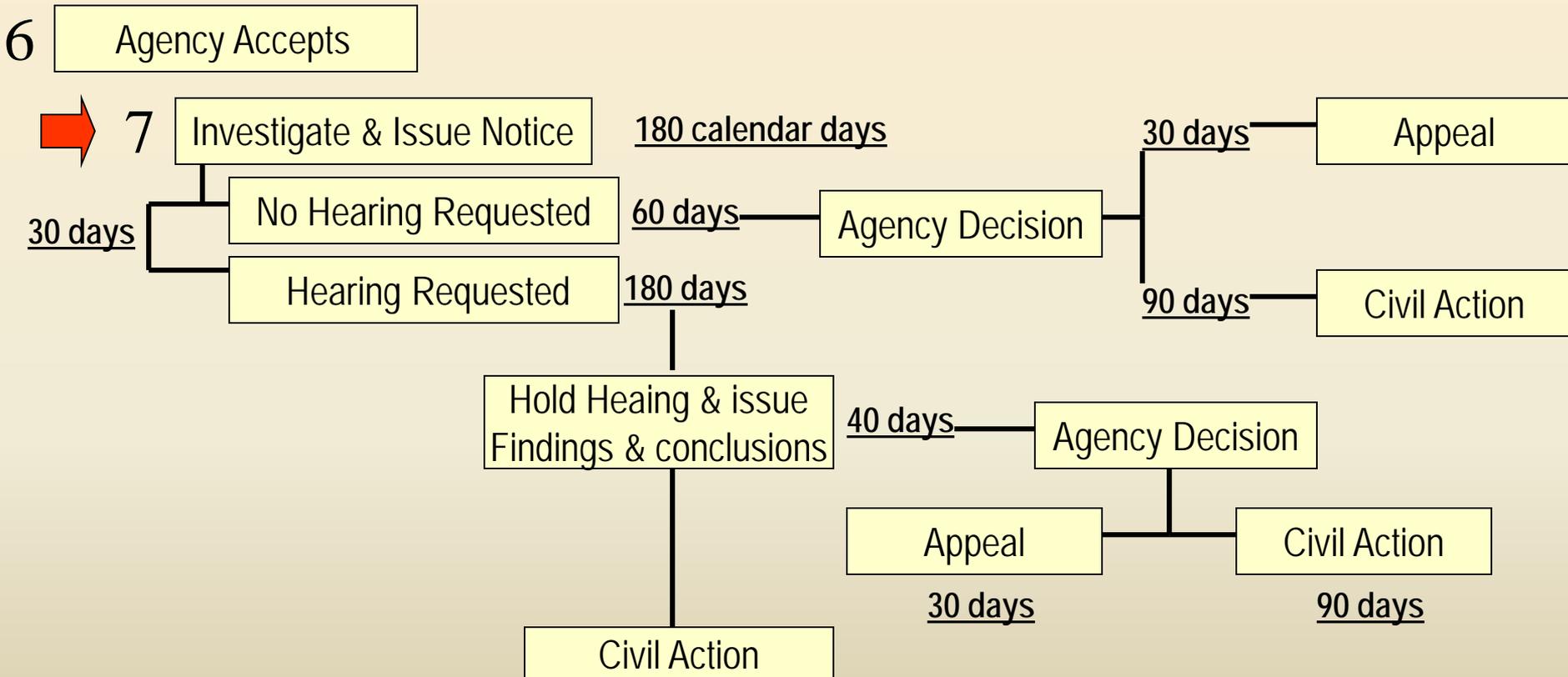




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COMPLAINT PROCEDURES-FORMAL





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ALTERNATE DISPUTE RESOLUTION (ADR):

Mediation Process:

- Non-controversial in nature.
- Provided through the skills of a trained mediator or mediators (not typically from within the direct chain of command).
- Allow parties involved to arrive at what each of them agree is the best resolution.
- Permits the complainant to still pursue a formal complaint if not satisfied with the process.

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RESPONSIBILITIES:

STATE EQUAL EMPLOYMENT MANAGER:

- Manage and directs the program through EEO Counselors
- Develop and implement the EEO program.
- Ensure that policies are in place.
- Coordinate EEO training.
- Identify unlawful discriminatory practices and act promptly.
- Implement remedies to eliminate and prevent unlawful discrimination.
- Conduct fact finding or inquiry.
- Be neutral and objective.
- Conduct Unit Climate Assessment.

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RESPONSIBILITIES:

EEO SPECIALIST:

- Assists in develop and implement of the National Guard Bureau Equal Employment Opportunity Program at the State level.
- Conduct periodic analysis of the military technician work force to identify underrepresented classes in various occupations and military grades/ranks.
- Assists in the management of the State EEO complaints processing system.
- Disseminates news and information concerning the State equal opportunity program.

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RESPONSIBILITIES:

EEO COUNSELOR:

- Who are trained to serve as a bridge between management and employees for EEO matters.
- Whose primary objective is to attempt an informal resolution of all complaints brought before them.
- Who must be perceived by both parties as neutral.

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RESPONSIBILITIES:

SUPERVISORS-MANAGERS:

- Preventing harassment of any employee on the basis of race, sex, religion, national origin, or disability.
- Ensure all members refrain actions or comments that might be viewed as discriminatory.
- Ensuring that all programs, activities and services are made available to all without discrimination.
- Prevent or correct discriminations situations.

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LEADERS MUST SUPPORT INDIVIDUALS RIGHTS AND RESPONSIBILITIES

- Present a complaint without fear of intimidation or reprisal.
- Receive assistance when submitting a complaint.
- Attempt to resolve: 1st informing the offender to **STOP**.
- Submit only legitimate complaints and exercise caution against unfounded events.

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CONCLUSION:

A Healthy Climate should embrace diversity and ensure that all personnel are treated fairly, with dignity and respect.

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State Equal Employment Manager
Equal Opportunity Officer
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SGT Jessica I. Elicier Vázquez
Equal Opportunity Specialist
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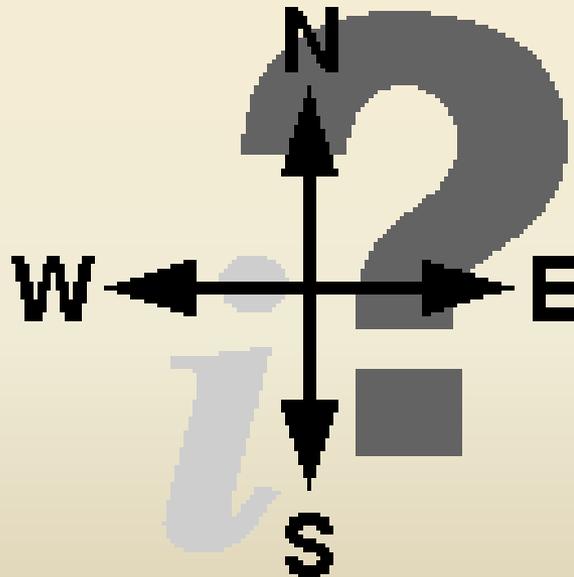
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QUESTIONS



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Ethics

MAJ WILLIAM E. OCONNOR
FULLTIME JUDGE ADVOCATE
(787) 289-1400 Ext 11032

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DEFINITIONS

- ***Ethics***: a subset of morals that deals with the behavior of a given profession.
- ***Ethical***: conforming to accepted professional standards of conduct.





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ETHICAL CONDUCT

Principles - public service is a public trust, requiring:

- Loyalty of employees
- Honest effort in performing duties
- Impartiality



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ETHICAL CONDUCT

Principles (continued)

- Protection of Federal property
- Disclosures of waste, fraud and abuse, etc
- Adherence to EEO laws
- Satisfaction of financial obligations



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ETHICAL CONDUCT

Basic Concepts – employees shall...

- Apply principles to propriety of conduct
- Avoid appearance of violation of the law governing ethics (5 CFR Part 2635)
- Seek advice of agency “Ethics Official” (usually JAG) whenever in doubt.



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ETHICAL ISSUES

~Gifts from...

- Outside sources
- Between employees



~Conflicting financial interests

~Impartiality in performing official duties



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ETHICAL ISSUES TO BE CONSIDERED

- Seeking other employment
- Misuse of position
- Outside activities
- Political/social activities





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GIFTS FROM OUTSIDE SOURCES

Basic prohibitions: an employee shall not solicit or accept a gift given because of his/her official position or from a prohibited source





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EXCEPTIONS: **GIFTS FROM OUTSIDE SOURCES**

- Unsolicited items less than \$20 per occasion / \$50 per CY from any one source
- Certain awards and honorary degrees
- Free attendance provided to an event the employee is participating in
- Travel/entertainment for employment purposes



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GIFTS FROM OUTSIDE SOURCES

Limitations on use of exceptions: an employee may not use exceptions to solicit/coerce the offering of a gift or to accept gifts

Disposition of gifts: various methods – market value payment; return; donation; destruction; or in some cases, sharing



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GIFTS BETWEEN EMPLOYEES

Basic prohibition – an employee may not...

- Give to or solicit a gift from a superior
- Accept a gift from a lower-paid employee, unless donor/recipient are not in a superior/subordinate relationship

Definition of a gift: almost anything of monetary value



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GIFTS BETWEEN EMPLOYEES EXCEPTIONS

- Items (non-cash) less than \$10 per occasion
- Office shared food
- Personal hospitality at residence
- Leave sharing under OPM guidelines
- Infrequent occasion of personal significance or upon termination of superior/subordinate relationship



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CONFLICTING FINANCIAL INTERESTS

Employees financial interests are subject to criminal conflict of interest statute (18 U.S.C. 208) or agency supplement thereto.

Disqualifying interests affect finances of:

- ~self
- ~spouse
- ~minor child
- ~general partner
- ~others served



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OFFICIAL DUTIES

Impartiality in performance: need specific authorization required if impartiality in question

Matters covered: any involving interests of self, member of household, close personal or any business relationships

Disqualification: applies (as under financial interests)



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SEEKING OTHER EMPLOYMENT

Seeking other employment: any form of non-federal business relationship involving provision of personal services. This includes...

- Mutually conducted employment negotiations
- Sending an unsolicited resume or proposal
- Employment contact by or through others



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MISUSE OF POSITION

Involves:

- Use of public office for private gain
- Revelation of non-public information
- Unauthorized use of government property
- Performance of unofficial duties on official time



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OUTSIDE ACTIVITIES

Restrictions imposed by other laws:

- Acceptance of office/title/compensation from a foreign government
- Engaging in representational activities before the U.S. government
- Prohibition of employees' participation in certain partisan political activities



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OUTSIDE ACTIVITIES

- When serving as an expert witness: must not represent anyone other than the U.S. if the U.S. is a party to or has a direct interest in any court proceedings
- Fundraising: may engage in charitable efforts if in a personal capacity



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OUTSIDE ACTIVITIES

- Teaching, speaking and writing: an employee shall not receive compensation if related to his/her official duties.

(there are exceptions for teaching courses that may be related to duties)



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NEPOTISM

(5 USC 3110/ 5 CFR210/TPR 310.1)

A public official may not appoint, promote or advocate employment of a relative within his/her agency

Who is a "public" official? This category includes military or civilian personnel who have the authority to appoint, promote or recommend employment



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HATCH ACT – POLITICAL ACTIVITY OF NATIONAL GUARD TECHNICIANS

(5 usc 7324/5 CFR 733)

Federal employees may...

- Be candidates for public office in nonpartisan elections
- Contribute money to political organizations
- Attend political fundraising functions
- Attend/be active at political rallies/meetings
- Make campaign speeches for candidates in partisan elections
- Hold office in political clubs or parties



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HATCH ACT – POLITICAL ACTIVITY OF NATIONAL GUARD TECHNICIANS

(5 USC 7324/5 CFR 733)

Federal employees may not...

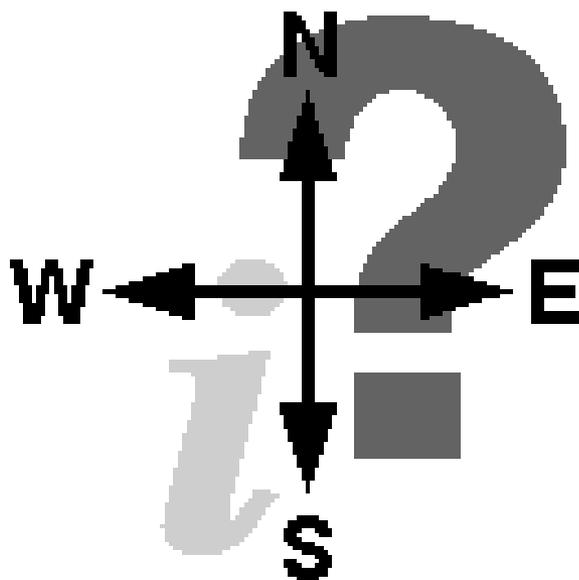
- Use official authority or influence to interfere with an election
- Solicit or discourage political activity of anyone with business before their agency
- Solicit or receive political contributions
- Be candidates for public office in partisan elections
- Engage in political activity while on duty



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Questions



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Technicians on Military Duty



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Sam Ple' Goes on Deployment

- Sam Ple' has received orders for a 12 month deployment (title 10) + 2 months of training (title 32) prior deploying, a total of 14 months he will be gone.
- 2 types of ORDERS (it gets tricky)



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Let Us Know

The Supervisor must notify HRO when:

- Employee will be entering military duty for more than 31 days (as much notice as possible).
- *Does NOT matter if they are using leave, laws and regulations change often so we need to provide employees with the most current information on their rights and entitlements.

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USERRA

Uniformed Services Employment and Reemployment Rights Act

- USERRA protects the job rights of individuals who voluntarily leave employment positions to undertake military service or certain types of service in the National Disaster Medical System. USERRA also prohibits employers from discriminating against past and present members of the uniformed services, and applicants to the uniformed service.

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The Process

- Once HRO has been notified, we will coordinate a Absent-US briefing by phone or face-to-face with the employee to explain their rights and benefit entitlements.



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Benefits

- Benefits **CAN** be continued through military service but they are treated differently based on the type of orders the employee will be on. It is **up to the employee** to make elections that suite their needs.



Title 10 Vs. Title 32

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Setting the Effective Date

- The Absent-US personnel action will be processed with an effective date the same as their military orders **UNLESS** the employee has and wants to double-dip using regular **Comp Time**. If there is comp time to be used it must be used in the beginning.

EXAMPLE

Employee orders start January 1, normally the Absent-US would be effective January 1 but the employee has 40 hrs of regular comp time they want to use so the new effective date for the Absent-US is January 6 (1-5 on Comp).

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Double-Dip/LEAVE

- Once HRO hard codes the employee in Absent-US (KG), timekeepers can still code the following types of leave while the employee is on orders:
 - **Military Leave (LM)**
 - **Annual Leave (LA)**
 - **Sick Leave (LS) (In accordance with regulation)**
 - **Travel Comp Time (CF)**
 - **Time Off Awards (LY)**

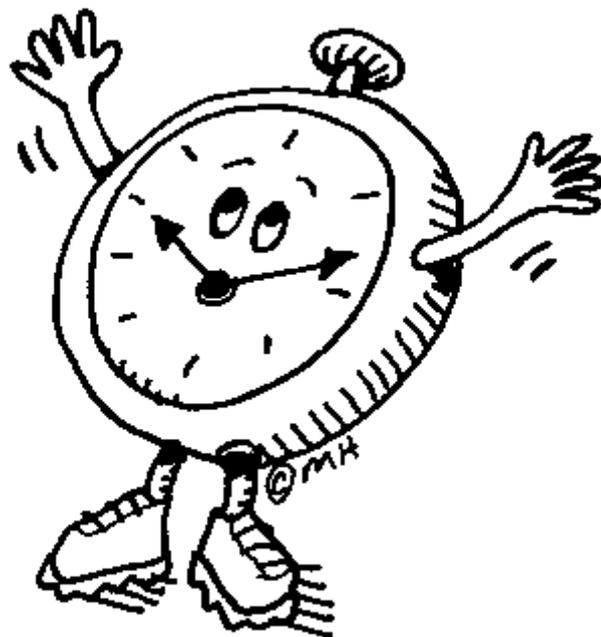
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Wait For The Return



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Return to Duty



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They're Back ... Now What?

- Re-employment Timeframes (when do they need to return)
 - If the Employees activation was:
 - Less than 31 days – First scheduled regular work day after orders end
 - 31-180 days – NLT **14** calendar days after orders end
 - More than 180 days – NLT **90** calendar days after orders end.



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Notify HRO Benefits Section

- Ø Once the employee has made contact with you:
 - Inform the employee they will need to complete a **Return to Duty** brief with HRO.



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Benefits (Employee Will Make Elections)

- **FEHB (Health)** – RTD is a qualifying life event to start, stop or change health benefits.
- **FEDVIP (Dental/Vision)** – RTD is a qualifying life event to enroll in or cancel.
- **TSP** – Employee will be able to make up missed contributions as well as receive agency matching and automatic 1% for time in Absent-US.
- **Retirement** - Employee will be able to make a deposit on time in Absent-US to count toward civilian retirement.

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Watching the LES

- Please ensure the employee is **checking their LES every pay period** after they return to make sure all benefits are restored correctly and the correct deductions resume.



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Pay Attention to Changes

- Please be sure to **pay close attention** to any changes you see in your returning employees, especially after deployments when it may take time to adjust.
- If your returning employee is having issues adjusting please refer them to **Military OneSource or Technician Assistance Program** for the type of assistance they are needing.

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Sam Ple' is Having Some Issues

- Upon his return from deployment, Sam Ple' has been suffering from insomnia and some other emotional and behavioral problems which are starting to show in the workplace...



Call HRO & seeks assistance

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Classification and Position Management



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Classification

- The process of determining the appropriate pay plan, series, and grade of a position based on its designated duties and responsibilities, and consistent with prevailing laws, standards, and guides



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Reasons for Position Reviews:

- n Reorganizations**
- n New OPM Classification Standards**
- n Classification Releases from NGB**
- n New Equipment/Technology affecting jobs**
- n Requests for Reviews by the
Supervisor/Directorate (Not the Employee!!)**

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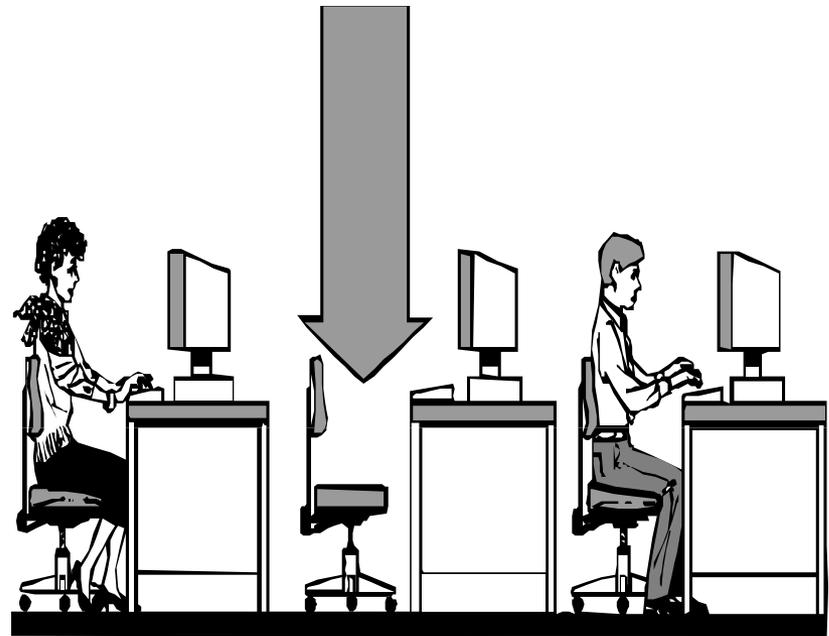


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Desk Audits

- DESK AUDITS
 - A fact-finding visit to the job site
 - Incumbent and supervisor are interviewed
 - The Group audits can be conducted when several incumbents occupy Identical Additional (IA) positions



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What information should be put in a request for a Position Review?

- b What has changed in your job**
- b What caused the change(s)**
- b Are the changes temporary or permanent**
- b Organizational Charts**

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General Classifications Rules

- Evaluate the position – not the person
- Evaluate the total position, not just parts of it
- Evaluate each position in its own merit
- Consider the intent of the standard... its basis and the differences between grade levels

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Position Review Findings May Result in:

- **No change to the existing Position Description (PD)**
- **An amendment to the existing PD**
- **Placement against another standardized PD, with no grade change**
- **Justification for establishment of a higher graded PD (or lower graded PD)**
- **Establishment of an exception PD – if the situation is unique to the state**

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Things that don't count in
Classification are...



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“Unusual Diligence or Overtime”



**“Unusual Qualifications”
(Not Required on the Job)**

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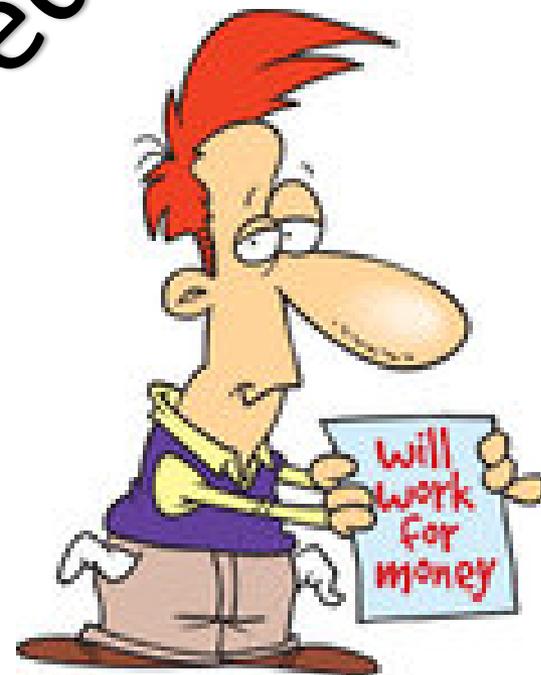


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*"Relative Efficiency"
(Compared to Others)*

Still not considered...



"Financial Need"

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Puerto Rico National Guard

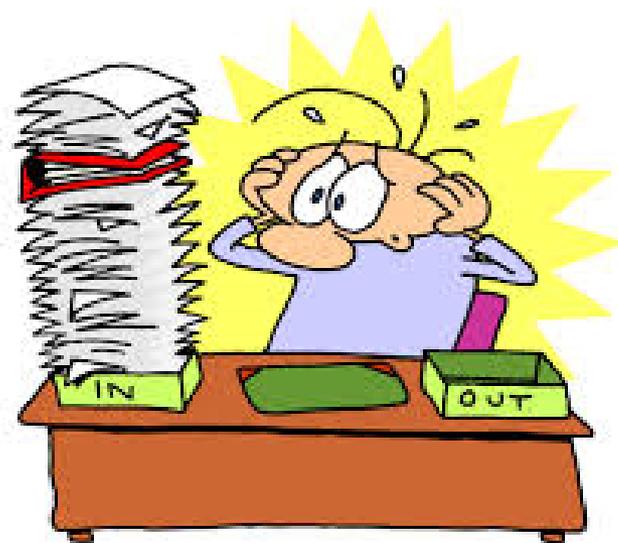


Still not considered...



“Scarcity of Employees”

“Volume of Work”



“Our People, Our Families, Our Guard”



Puerto Rico National Guard



Still not considered...



“Personality”

“Length of Service”



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Things that “Do” Count
In Classification Are...

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Illustration by Chris Gesh

Considered!!

Nature and Variety of Work



Qualification Requirements of the Work

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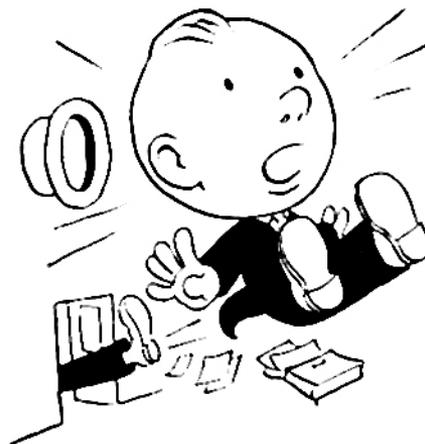
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Difficulty of the Work



Authority and Responsibility Exercised



Extent of
Supervisory
Controls Over the
Work



Considered!!

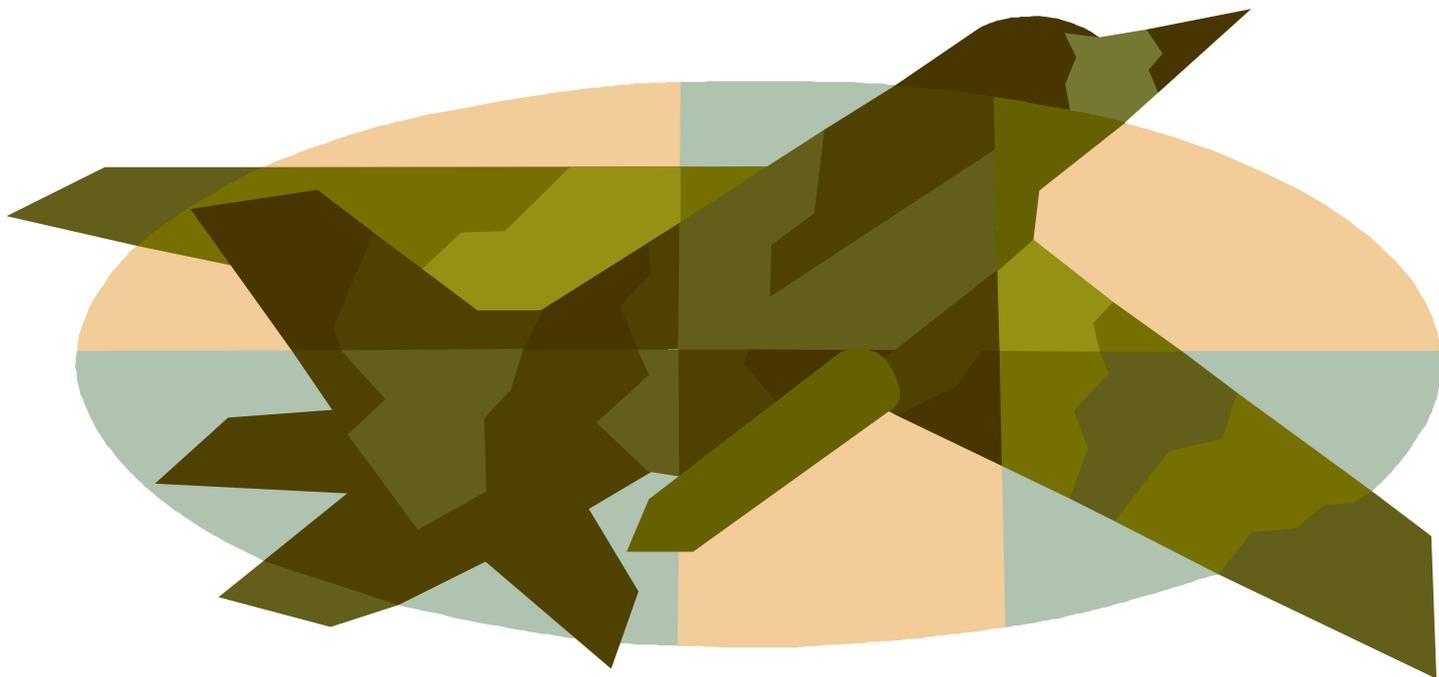
“Our People, Our Families, Our Guard”



Puerto Rico National Guard



Air Force National Guard



“Our People, Our Families, Our Guard”



Puerto Rico National Guard



Unit Manning Document (UMD)

- Provide information on Unit Manpower Documents (UMD)
- Explain new process for submitting Manpower Change Requests (MCR)
- Provide contact information for those in Manpower (A1M)

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Unit Manning Document (UMD)

- **Unit Manpower Document is the source for all manpower requirements**
- **Extracts from RAW, DCPDS, or MilPDS are for convenience purposes only, and cannot be “verified as accurate”**
- **UMD is the starting point for Pay, Security Clearances, bonuses, UTC taskings, etc.**
- **Any manpower question you have must reference an actual UMD. Do not manage your force off of another product...**
- **If its not on the UMD, it doesn't exist!**

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Puerto Rico National Guard

Manpower Change Requests **(MCR's)**

- **Submit MCRs in memo format via email to NGB/A1M Actions box. (A1M.Actions@ang.af.mil)**
- **MCRs must include complete justification and a spreadsheet in the specific format detailing the requested changes**
- **Format example located on CoP**



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Manpower Change Requests (MCR's)

- **Subject line on email should be MCR/State/Units affected.**
 - **Subject: MCR / AL / 187 FW / 280 CCS**
- **Each email is considered one MCR action request**
- **Within one MCR there can only be maximum of 10 actions**
- **Ensure MCRs are signed by the Wing Commander.**
- **Ensure all MCRs impacting full-time positions have the State HRO endorsement**
- **Ensure all MCRs impacting military positions have Director of Staff (DoS) endorsement**
- **Ensure all MCRs affecting State Joint Force Headquarters (JFHQ) are signed by TAG or Director of Staff (DoS)**

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Manpower Change Requests (MCR's)

- **Ensure MCRs do not adversely impact UTC tasked manpower requirements**
- **Ensure all MCRs requesting realignment of full-time resources remain within valid full-time manpower requirements, allocated resources by Resource Identification Code (RIC) and authorized control grades. (ZERO-SUM GAME)**

NGB/A1M Responsibilities:

- **Acknowledge receipt of MCR within 48 hours and provide requestor an MCR tracking number**
- **Aim to process MCRs within 30 days of receipt**

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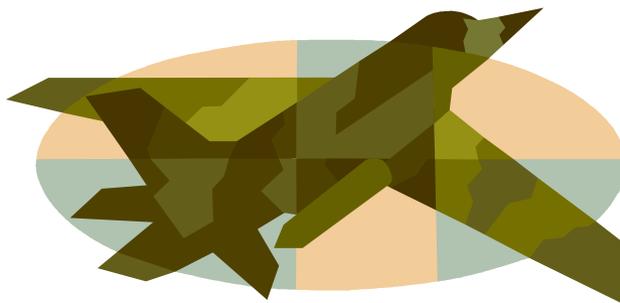


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Manpower Change Requests (MCR's)

- **If approved, NGB/A1M will notify the requester and/or State HRO in writing and the requested changes will be made to the UMD**
- **If request is disapproved or incomplete, NGB/A1M will provide a written response to the requester and HRO (or DoS) explaining why the requested action was not taken**



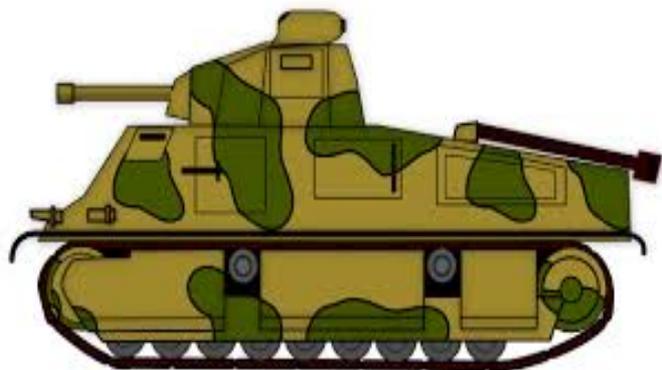
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Army National Guard



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Puerto Rico National Guard



What is the Full Time Manning (FTM) Voucher?

The FTM Voucher distributes Active Guard Reserve (AGR) and Military Technician (MILTECH) resources both Dual-Status and Non Dual Status, to the 54 States, Territories, District of Columbia and NGB (Title 10) on an annual basis.

The ARNG Staff, Advisory Councils and States, CoS, G4 and FIRO work in coordination throughout each Fiscal Year to produce, analyze, and select Course of Actions (COAs) for the FTM Voucher.

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Voucher Managed Level of Resourcing (MLR)

Modification table of organization and equipment (MTOE)

AGR – 66.1%
TECH – 76.7%

The army school system (TASS)

AGR – 56.9%
TECH – 74.0%

Table of Distribution and Allowances (TDA)

AGR – 63.9%
TECH – 65.0%

Joint Force Headquarters (JFHQ)

AGR – 50.0%
TECH – 50.0%

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Questions?

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Supervisors Course

Labor Relations 101

1LT Zaida L Torres

1LT Luis Colón

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Why do we have a Union?

- 5 USC, Chapter 71 is the Federal Service Labor Management Relations Statute
- It was part of the Civil Service Reform Act of 1978 (Public Law 90-486)
- This same law created the Federal Labor Relations Authority (FLRA) which oversees labor/management government wide

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Legal Hierarchy

Constitution

Public Law

5 U.S.C

5 C.F.R.

Collective Bargaining Agreement (CBA)

Executive Order (EO)

Dept of Defense, Dept of Army, Dept of Air Force,

National Guard Bureau

Local Directives

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HRO-LRS is Your Resource for Matters Involving:

- Employee Conduct
- Employee Performance
- Changes to Work Conditions
- Negotiating with the Union
- Union Information Requests
- Employee Grievances

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The Bargaining Unit

- The Union represents Technicians with the Bargaining Unit Status code of NG5090
- The Association Civilian Technicians of (ACT) represents all of Puerto Rico technicians; ARMY.
- Air National Guard Technicians are currently not represented by any Union.

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The Bargaining Unit

continued

- ACT Local 119 is our state's Union and Chapter.
 - **President**, Roberto Hernandez
 - **Vice President**, Andres De Leon
 - **Executive Vice President**, Jose Ramos Gotay
 - **Secretary/Assistant Executive VP**, Mikee Lopez
 - **Chief Steward**, Luis Cruz
 - **Physical Security/Safety Monitor**, Guillermo Cruz

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The Federal Labor Relations Authority (FLRA)

- Determines the Bargaining Unit 5 USC 7112(b)
 - Exemptions include:
 - Supervisory/Management Officials
 - Personnel lists
 - Employees engaged in work affecting national security
 - Employees who perform agency investigative or audit activities
 - Confidential Employees

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Bargaining Unit Exclusions

5 USC 7112(b)

- Only the Federal Labor Relations Authority (FLRA) can determine an exclusion

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Management Rights

5 U.S.C. 7106(a)

- “...(1) to determine the mission, budget, organization, number of employees, and internal security practices of the agency...(2)...(A) to hire, assign, direct, layoff, and retain employees in the agency, or to suspend, remove, reduce in grade or pay, or take other disciplinary action against such employees; (B) to assign work, to make determinations with respect to contracting out, and to determine the personnel by which agency operations shall be conducted; (C) ...to make selections for appointments...(D) to take whatever actions may be necessary to carry out the agency mission during emergencies.”

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Bargaining Rights

5 U.S.C. 7106(b)

- “Nothing in this section shall preclude any agency and any labor organization from negotiating- (1) at the election of the agency, on the numbers, types, and grades of employees or positions assigned to any organizational subdivision, work project, or tour of duty, or on the technology, methods, and means of performing work; (2) procedures...(3) appropriate arrangements for employees adversely affected...”

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Management Rights

- Must notify the Union with the intent to exercise a management right
- Must bargain in good faith the appropriate arrangements of these changes

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Management Responsibility

- Under 7106(b) we must negotiate fully any change that is not a management right
- Government wide, managers' most frequent failure in labor relations is failing to notify the union in the event of a change to work conditions and extending the opportunity to negotiate the change

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President Obama's Executive Order 13522

- Establish labor-management forums
- Improve government services
- Get employee involvement and improve morale

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Pre-Decisional Involvement with the Union (PDI)

- Presidents Obama's E.O. directs agencies to seek "pre-decisional involvement" with the Union
- Pre-decisional involvement means having early discussions with the union about issues and concerns *before* there is a plan to make a change
- It means sitting down with interests and issues, *not* solutions

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Pre-Decisional Involvement is NOT.....

- Pre-decisional involvement does not mean negotiating.
- We can always fall back on the law, and exercise traditional bargaining under 5 U.S.C. 7106
- If we don't accomplish an agreement during pre-decisional involvement, the later negotiations will be more efficient because of the prior talks

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What CAN the Union Do?

- Request to bargain...
- If the change is to a management right, they can bargain the impact of the change, or the procedure to implement that change
- If the change is not a management right, they can bargain the substance of the change

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Work Conditions / Conditions of Employment

- Management makes all of the decisions (Management Rights)
 - Organizational Decisions
 - Personnel Management Decisions
 - Assignment of work

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Work Conditions are...

- Personnel Policies and Practices; or
- Matters involving the environment, or situation of bargaining unit employees... 5 U.S. Code 7106

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Do I need to Notify the Union?

- Before, you as a Supervisor or a Manager implement a change, ask yourself these 3 questions:
 - Does the change affect work conditions?
 - Does it affect Bargaining Unit Employees?
 - Is the change significant?

If the answer to all 3 is yes, then yes, you do.

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Negotiating

- Notify the union prior to implementation
- Allow the union to respond
- Consider the union's ideas
- Explain any proposals you don't adopt
- Repeat the cycle until you have "Bargained in good faith"
- Implement

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Formal Discussion Under 5 USC 7114(2)(A)

The Union has the right to ...

- Be represented at any formal discussion,
- between one or more representatives of the agency AND one or more bargaining unit employees or representative, AND
- related to any grievance or any personnel policy or practices or other general conditions of employment

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Formal Discussions Are...

- Determined by the totality of the circumstances;
- The number and level of supervisors
- How long it lasted
- Where it was held
- How it was called
- Was an agenda written or minutes taken?
- Was attendance mandatory?
- The subject matter

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Management Obligations

5 USC 7117(d)(2)

- Notify the appropriate union representative of the meeting
- Afford union the opportunity to select its representative and to attend
- Allow the union representative to actively participate at the meeting

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There Is No Formal Discussion When/If...

- Discussion is about and with an individual employee related to his/her:
 - Personal problems
 - Performance evaluation
 - Job performance
 - Oral reply to proposed disciplinary action(s)
- During impromptu meetings on the shop floor

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Weingarten Rights

5 USC 7114

- This refers to the right of a bargaining unit employee to be represented by the union when all three apply:
 1. The employee is examined in an investigation conducted by one or more representatives (supervisors/managers) **AND**
 2. The employee reasonably believes disciplinary action against him/her may result **AND**
 3. The employee requests union representation

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Negotiated Grievance Procedures 5 USC 7121

- Collective Bargaining Agreement (CBA) Outlines the procedures
- HRO-LRS Administers the Grievance Process and facilitates the dialogue between the Union and the Supervisor

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Negotiated Grievance Procedures 5 USC 7121

- Coverage (continued):
- Limits employees to either union or self representation
- Does NOT apply to people excluded from the bargaining unit

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Management Unfair Labor Practices under 5 USC 7116(a)

- Interference, restraint or coercion of an employee in the exercise of assured rights
- Encourage or discourage membership in a labor organization by discrimination with respect to conditions of employment
- Sponsor, control or otherwise assist a labor organization

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Unfair Labor Practice (ULP) under 5 USC 7116(a)

- Violation of the Labor Management Statute (5 USC 71)
- May be filed with the Federal Labor Relations Authority (FLRA) for violations of the Statute (5USC71)
- HRO-LRS will assist with the ULP process

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Management Unfair Labor Practices under 5 USC 7116(a)

- Discipline or discriminate against an employee because the employee has filed a complaint or given testimony under 5 USC 7116
- Refuse to consult/negotiate
- Fail to cooperate in impasse procedures
- Enforce rules or regulations in conflict with a prior collective bargaining agreement

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ULP Process

- The ULP is “Pre-Filed” with the other party.
- The ULP is filed with the Regional FLRA office if not resolved
- The Regional FLRA office will investigate the merits of the case
- If the case is determined to have merit, the FLRA will issue a complaint to a Administrative Law Judge within the FLRA

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ULP Process (Cont.)

- The Administrative Law Judge will issue a ruling and a legal order for resolution
- Orders may include cease and desist, publish a notice of correction, or return to status quo.
- There is an appeal process

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Alternative Dispute Resolution (ADR) (Also known as Conflict Resolution)

- Mediation
- HRO Coordinates Mediations
- HRO is the ADR managing office
- Tracks and reports to NGB

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ADR Coverage

- Grievances
- EEO cases/issues
- Hearing examiner cases.
- Workplace problems
- ANY issue the parties agree to place under ADR
- ULP cases
- Contract interpretation disputes
- Bargaining disputes

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Use of Official Time 5 USC 7131

- Internal union business shall be conducted during the non-duty hours of the employees concerned:
 - MUST approve for: Collective Bargaining
FLRA Proceedings
 - MAY approve for: Other representational
activities
 - MAY NOT approve for: Internal union
business

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Past Practice

5 USC 7117

- Once the parties establish a practice it becomes a condition of employment and must be bargained substantively if it is to be changed.
- You do not have to bargain over the decision to change a practice which conflicts with law or a government-wide regulations
- Management is not free of the obligation to provide the union with advance notice of its intent to change what has been a condition of employment
- Management must bargain changes unless the union waives its right to bargain

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Labor Relations Bottom Line

- If you are unsure regarding a situation.....call HR-LRS
- If you have a conduct or performance issue.....call HR-LRS
- Remember, there are no stupid questions....If you have ANY questions.....call HR-LRS

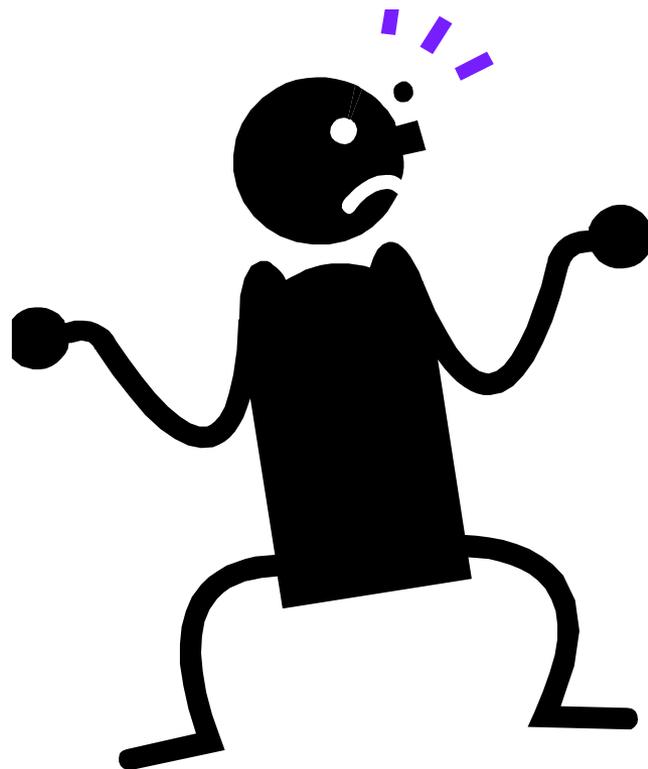
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Questions?



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Worker's Compensation (OWCP)

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What is FECA?

- The Federal Employees' Compensation Act (FECA) was passed in 1916 to provide benefits in the event that a Federal civilian employee is injured or killed while in the performance of their duties.
- It establishes a non-adversarial procedure administered by the Department of Labor, Office of Workers' Compensation Programs (OWCP).
- It is the exclusive remedy for federal civilian employees. Employees, or their dependents, cannot sue the United States for damages as a result of a work related injury or death.
- Benefits paid under FECA are initially paid by the Department of Labor (DOL) and then charged back to the employee's agency. The agency then reimburses the DOL for the benefits paid to its employees.
- Employees can appeal OWCP decisions, employers cannot.

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Coverage Under FECA

- An employee is covered under FECA if, while in the performance of their duties, they sustain a traumatic injury or occupational illness. This includes death caused by the injury or illness.
- This coverage Includes aggravation, precipitation and acceleration of a pre-existing non-work related condition.
- It also Includes damage to or destruction of medical braces, artificial limbs and other prosthetic appliances as long as the damage or destruction occurred in the performance of duty.

Coverage is not afforded for instances associated with simple exposure to an infectious disease without the occurrence of a work-related injury. Similarly, fear of exposure to an infectious agent does not entitle the worker to benefits if no definable injury has occurred.

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Initiating A Claim for a Traumatic Injury (CA-1)

- There are a number for forms that are required when filing a workers' Compensation claim. Not every form will be required for every injury. The Injury Compensation Program Administrator (ICPA) at your agency should have these forms available for you.

CA-1 Form	Traumatic Injury
CA-2 Form	Occupational disease/illness
CA-7 Form	Lost wages or scheduled award
CA-16 Form	To authorize medical treatment in cases of traumatic injury
CA-17 Form	Specifies job requirements to physician
CA-35 Form	Checklists for various occupational diseases

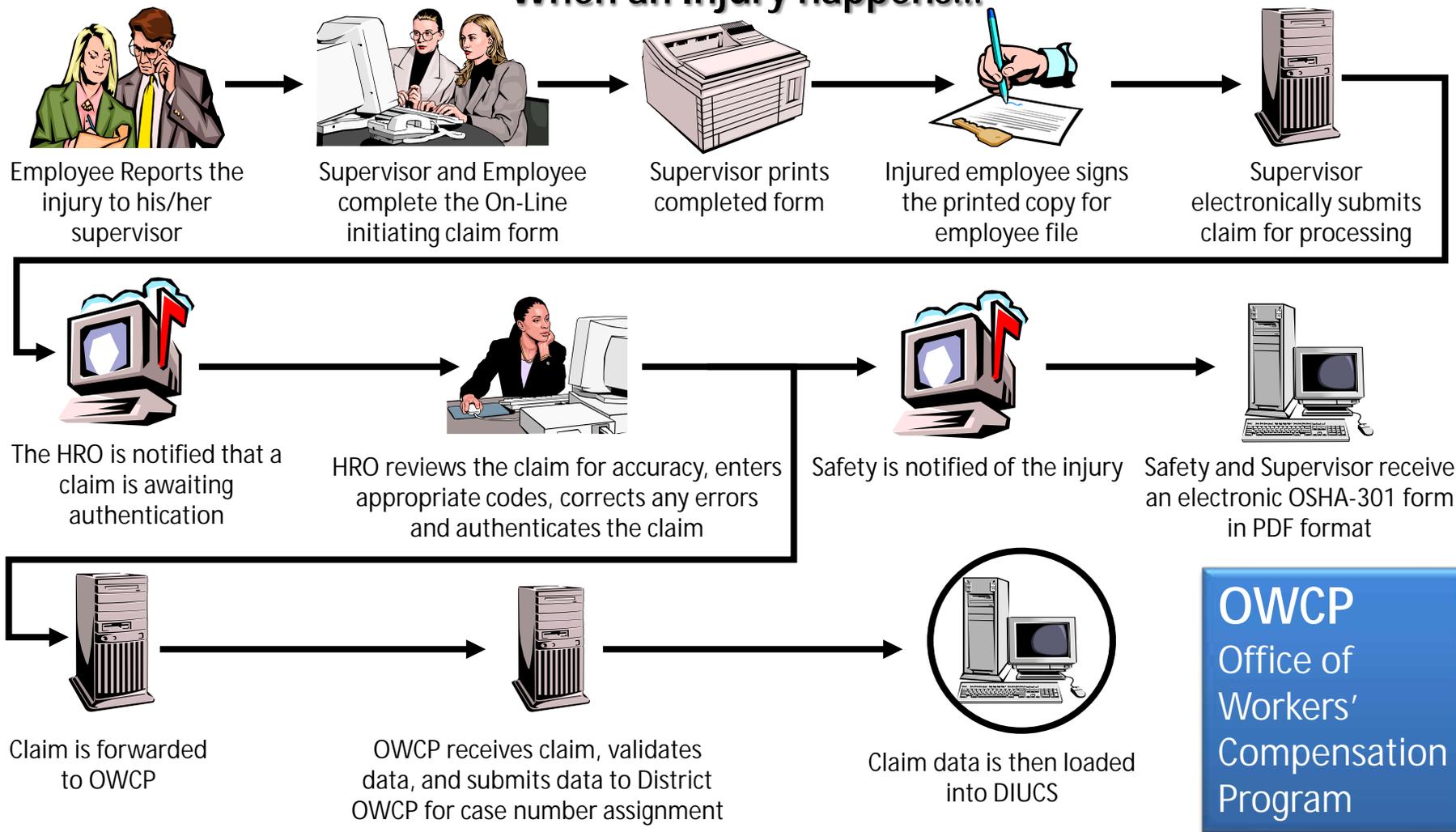
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When an Injury happens...



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On the Army Intranet

Welcome to the Human Resource Office. Give us a call with your HR questions and concerns. 503.584.3975

J1 - Human Resources
July 9, 2013

Home Help Privacy Security Login

HR Home OPM Staffing & Manpower Employee Benefits Labor Relations Contract Employee EO, EEO & Diversity Training & Education Information Systems **OWCP**

Point of Contact
Ms Diane Walker
Human Resource Specialist(Employee Relations)
(503-584-3406) or diane.l.walker14.civ@mail.mil

Supervisors

Online Training for Supervisors:

- Workers' Compensation Basics
- Filing a Claim Online
- Entering a CA-1 Online
- Entering a CA-2 Online

Employees

What to do if injured:

1. Immediately report any work-related injury to your supervisor.
2. You have a right to choose your treating physician.
3. Provide information where needed.
4. Keep your supervisor informed.



Website

- OWCP Website

Forms

- CA-1, Federal Notice of Traumatic Injury and Claim for Continuation of Pay/Compensation
- CA-2, Notice of Occupational Disease and Claim for Compensation
- CA-7, Claim for Compensation
- CA-7a, Time Analysis Form
- CA-17, Duty Status Report
- CA-20, Attending Physician's Report
- CA35, Evidence Required in Support of a claim for Occupational Disease

Agency Publications(s)/Regulation(s)

- OWCPTR 319.2 (1 Jun 2004)
Full-Time Personnel Physical Fitness Training During Scheduled Work Hours
- OWCPTRP 810 (1 Jan 2005)
Supervisor's Guide to Technician on the Job Injuries
- CA 810 (2003)
Injury Compensation for Federal Employees

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Supervisor Should Take the Following Actions for Traumatic Injury:

Electronic claim filing using EDI

- Sit down with employee and fill out form
- Print out and sign hard copy form
- Submit the completed electronic form to the ICPA
- Provide the employee with signed receipt and Rights and Responsibility Letter
- Forward signed hard copy form to ICPA
- The EDI system will create and forward notification to Safety

Paper claim filing

- Review employee information for completeness
- Fill out back of claim form and sign
- Provide signed receipt to employee
- Immediately forward claim form to ICPA
- Notify Safety of the injury

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Supervisor Should Take the Following Actions for Occupational Disease/Illness:

- Provide employee with appropriate CA-35 Checklist
- Collect all pertinent information per the Checklist
- If you believe the employee is not entitled to benefits, contact the ICPA for guidance on challenging the claim

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Supervisor Should Take the Following Actions for Occupational Disease/Illness:

Electronic claim filing using EDI

- Sit down with employee and fill out form
- Print out and sign hard copy form
- Submit the completed electronic form to the ICPA
- Provide the employee with signed receipt and Rights and Responsibility Letter
- Forward signed hard copy form to ICPA
- The EDI system will create and forward notification to Safety

Paper claim filing

- Review employee information for completeness
- Fill out back of claim form and sign
- Provide signed receipt to employee
- Immediately forward claim form to ICPA
- Notify Safety of the disease/illness filing

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Requirements for Coverage

- Submitting a claim is different than having the claim accepted by OWCP. An employee, if they wish, can submit a claim for catching the flu. Submission of a claim, however, does not necessarily mean acceptance by OWCP.
- All claims must meet the following **five requirements** in order to be accepted:
 - Timely filed
 - Federal/Civilian Employee
 - Fact of Injury
 - Performance of Duty
 - Causal relationship



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Requirements for Coverage

A claim is timely if filed:

- **Traumatic Injury** - within 3 years of the date of injury.
The employee has 3 years to submit the claim form to their employer. An employee that gets injured on 4/5/2011 will have until 4/5/2014 to file a claim to be considered timely filed by OWCP. Not meeting this requirement could jeopardize the claim's acceptance by OWCP.
- **Occupational Illness** - within 3 years from first date of awareness or last date of exposure, whichever occurs later.
An employee files a claim for Carpal Tunnel Syndrome. They became aware of the condition five years ago. They are filing a claim now because they are retiring. They have continued to perform the same duties up until their retirement. Since their date of last exposure will be the later date, this date will be used to determine whether the claim was timely filed. If the employee files within three years of their retirement date then they will have met the timeliness requirement.

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When to Disclose OWCP Information

- There will be times when you will need to discuss the Workers' Compensation claim of an employee with other agency personnel. There are Department of Labor rules that govern the disclosure of this information.

FECA CIRCULAR NO. 09 –

05 August 26, 2009

“The Office of Workers’ Compensation Programs (OWCP) has determined that records covered by DOL/GOVT-1 may not be used in connection with a personnel action absent consent of the subject of the record.”

- Workers’ Compensation information is to be used for only Workers’ Compensation purposes unless authorized by the employee. The information cannot be used for purposes such as disciplinary action, removal, or the EEO complaint process without the express permission of the employee. The information, however, can be used to determine placement opportunities for the employee. So while you cannot provide information to a Labor Relations Specialist working on a proposed removal, you can provide pertinent information to the Staffing specialist working on a placement for the employee.

If you are in doubt as to whether you can release information, **just say no**, and then check with the ICPA for direction. The ICPA understands the rules governing release of information and can provide you with clear guidance.

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Supervisors Responsibilities

The following is a list of Supervisor responsibilities with regard to the Worker's Compensation program:

1. Ensure employees are aware of the procedures to report injuries and occupational illnesses.
2. Report all injuries and illnesses promptly to the ICPA.
3. Promptly complete injury compensation forms and send them to the ICPA. It is a criminal offense to purposely hinder or prevent an employee from filing a Workers' Compensation claim. Utilize the DoD EDI system for electronic filing of claims and assist the ICPA with necessary documentation.
4. Notify the employee of their right to choose a physician and assist the employee with receiving medical treatment when a traumatic injury has occurred.
5. Issue CA-16 when appropriate.

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Supervisor Responsibilities (cont.)

6. Ensure COP is recorded accurately and completely. Make decisions regarding whether to controvert COP based on information available.
7. Maintain contact with the injured worker and request periodic updates on the prognosis and duration of the medical condition.
8. Identify recommended duty accommodations with the assistance of the ICPA, Occ. Health, Safety, & Rehab personnel.
9. Work with ICPA and staffing to identify positions or when making light duty assignments.
10. 1Enforce Safety & Health regulations and take appropriate disciplinary action against employees who fail to comply.
11. Report injuries and illnesses as required by governing safety regulations.

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Supervisor Responsibilities (cont.)

POWER Initiative

- On July 19, 2010, President Obama established a 4-year Protecting Our Workers and Ensuring Reemployment (POWER) Initiative, covering fiscal years 2011 through 2014. The POWER Initiative will extend prior workplace safety and health efforts of the Federal Government by setting more aggressive performance targets, encouraging the collection and analysis of data on the causes and consequences of frequent or severe injury and illness, and prioritizing safety and health management programs that have proven effective in the past. Under the POWER Initiative, each executive department and agency will be expected to improve its performance in seven areas:
 1. reducing total injury and illness case rates;
 2. reducing lost time injury and illness case rates;
 3. analyzing lost time injury and illness data;
 4. increasing the timely filing of workers' compensation claims;
 5. increasing the timely filing of wage-loss claims;
 6. reducing lost production day rates; and
 7. speeding employees' return to work in cases of serious injury or illness.

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Supervisors Resources

- J1 intranet page - OWCP tab
- Online filing of claim:
<https://extranet.apps.cpms.osd.mil/>
- Online tutorials for supervisors:
 - Workers Compensation Basics
 - Entering CA-1 online
 - Entering CA-2 online

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Questions?



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Conduct Management

TPR 752

Discipline and Adverse Action

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SECTION A:

DISCIPLINE &
ADVERSE ACTIONS

SECTION B:

NON-DISCIPLINARY ACTIONS &
VOLUNTARY ACTIONS

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Section A:

DISCIPLINE & ADVERSE ACTIONS

- *Affects:*
 - the Technician
 - co-workers
 - supervisor(s)
 - the general organization
 - the Technician's family

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DISCIPLINE & ADVERSE ACTIONS

Discipline - Typically taken when a conduct-related incident occurs that warrants action by the supervisor; but less serious than adverse action situations.

Adverse Action - Typically taken by the supervisor for more serious conduct-related incidents; resulting in more severe action(s), such as change to lower grade or removal.

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Discipline & Adverse Actions RESPONSIBILITIES

The Technician - whose behavior/ conduct must be appropriate for the workplace.

The Supervisor - who must ensure that the technician's conduct does not interfere with an orderly and productive work environment

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Discipline & Adverse Actions

SUPERVISOR'S ROLE

- Ensure workers know expected behavior
- Ensure they know consequences of unacceptable behavior
- Respond to ALL cases; bring to technician's attention immediately
- Remove names/personalities to minimize bias; focus on problem – not person
- Initiates all disciplinary & adverse actions

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Discipline & Adverse Actions RESPONSIBILITIES

- Involve HRO immediately for guidance
- Fact-gather; ensure technician has representation, if requested
- Ensure actions are IAW NGB regulations and local union agreement(s)
- Consider individual's circumstances
- Document carefully and completely on NGB 904-1

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Discipline & Adverse Actions

TYPES OF ACTIONS TO TAKE

- ***Counseling*** - Private exchange;
 - discuss observations and
 - improvement needed
- ***Warning*** - Private, business-like
 - exchange; advise of observations and possible disciplinary action if no improvement

NOTE: Neither of the above is considered a disciplinary action

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Discipline & Adverse Actions

TYPES OF ACTIONS TO TAKE

- ***Oral Admonishment*** - One-way talk by supervisor; whatever criticism is necessary to correct the conduct/behavior
- ***Letter of Reprimand*** - Formal, written description of conduct; placed in OPF; actions may be grieve-able and/or further offenses could result in Adverse Action

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Section B: NON-DISCIPLINARY ACTIONS & VOLUNTARY ACTIONS

- Non-Disciplinary Actions – Management initiated; not for cause
- Voluntary Actions – Technician initiated

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NON-DISCIPLINARY ACTIONS

- Loss of military membership/loss of technician status
- Removal of technician from position due to failure to meet position requirement(s)
- Management directed reassignment
- Enforced leave
- Furlough of 30 days or less
- Transfer of function

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NON-DISCIPLINARY ACTIONS

These type of actions are those that are:

- Driven by failure to meet National Guard conditions of employment

OR

- Necessitated by program changes requiring involuntary staffing changes or reductions in hours

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Non-Disciplinary Actions:

REMOVAL FROM POSITION FOR FAILURE
TO MEET POSITION REQUIREMENTS

- Compatible military assignment
- Appropriate military appointment
- Flying Status
- Security Clearance
- Job-required licenses/certifications

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Non-Disciplinary Actions:

MANAGEMENT-DIRECTED REASSIGNMENT

- Technicians must be provided reasonable advance notice of the move, and must meet qualifications for the new position.
- Movement from one position to another with same grade and pay - Management may direct, without technician concurrence - Technician has no right to administrative hearing

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Non-Disciplinary Actions:

MANAGEMENT-DIRECTED REASSIGNMENT

- Movement from one position to a lower grade position
 - Management must get technician concurrence
 - Pay retention may be authorized
- NOTE: If the technician does not concur with the change to lower grade, management cannot reassign the technician under TPR 715.
 - Management may only process the action either for: misconduct IAW TPR 752 - OR -
 - poor performance IAW TPR 430

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Non-Disciplinary Actions:

ENFORCED LEAVE

- *Management must have the technician leave the work site if/when...*

- The technician is not ready, willing, AND able to perform assigned duties;

OR

- The technician's continued presence is highly undesirable or presents a threat

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Non-Disciplinary Actions:

ENFORCED LEAVE con't

- *In emergency situations, the supervisor must...*
 - Remove the technician from the work site and place him/her in appropriate leave status
- *When emergency is resolved...*
 - Discontinue enforced leave and offer technician choice of approved type leave or LWOP

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Non-Disciplinary Actions:

ENFORCED LEAVE con't

- If acceptable resolution – business as usual
- If not – discipline or adverse action should be pursued

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Non-Disciplinary Actions:

Furlough of 30 Days or Less

- Need legitimate reasons
- Must honor negotiated agreements
- May request TAG review

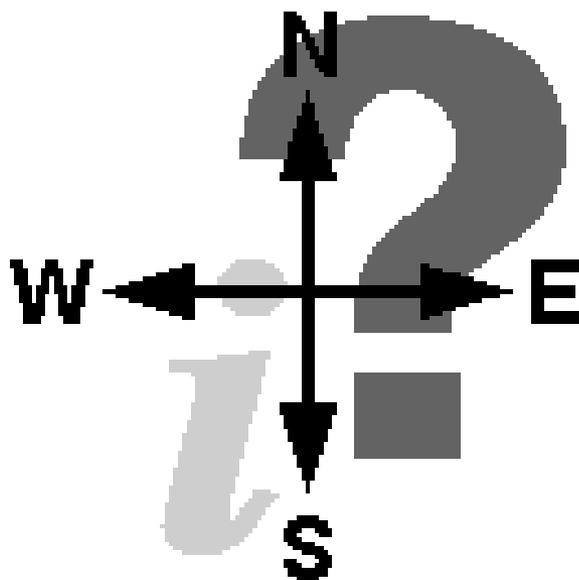
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Questions



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Suspension and Adverse Actions

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TYPES OF ADVERSE ACTION

- Suspension
- Reduction in grade
- Removal



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MORE ABOUT ADVERSE ACTION

- Get HRO involved; read related laws, regulations, and case precedents
- Have a verifiable reason (cause); be able to support charge(s)
- Show how proposed action will... *“Promote the efficiency of the service.”*
- Determine, with HRO, type of action to take; prepare Notice of Proposed Adverse Action



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5-STEP ADVERSE ACTION PROCESS

- 1. Notice of Proposed Adverse Action**
- 2. Technician's Right to Reply**
- 3. Original Decision Letter**
- 4. Technicians Appeal**
- 5. Final Decision Letter**



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ADVERSE ACTIONS PROCESS

- *Step 1. Supervisor, with HRO clearance, prepares Notice of Proposed Adverse Action, to include:*
 - Action proposed
 - Cause (reasons) for proposed action
 - Rationale for penalty selection
 - (Douglas Factors, Table of Penalties)
 - Right to review material



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ADVERSE ACTIONS PROCESS

- *Step 1. Supervisor, with HRO clearance, prepares Notice of Proposed Adverse Action, to include: (continued)*
 - Right to reply (must give min 7 days)
 - Right to excused absence to prepare reply
 - HRO availability for assistance
 - Who the Deciding Official is and Contact Info



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ADVERSE ACTIONS PROCESS

- ***Step 2. Technician has right to reply (may reply in writing, orally or both)***
 - Must give due consideration
- ***Step 3. Deciding Official provides Original Decision Letter, which must include:***
 - A statement of the action decided upon
 - Date action will be effective
 - Reference to technician's reply (if any)



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ADVERSE ACTIONS PROCESS

- *Step 3. Deciding Official provides (Original) Decision Letter, which includes: (continued)*
 - Reason(s) for decision
 - HRO availability for assistance
 - Technician's appeal rights (TPR 752-1)



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ADVERSE ACTIONS PROCESS

- *Step 4. Processing of the Administrative Appeal, which allows the technician a choice of:*
 - Appellate review; or
 - Administrative Hearing



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ADVERSE ACTIONS PROCESS

- *Step 5. The Final Decision, where the Adjutant General must address:*
 - Are the charges accurate/real?
 - Will discipline promote the efficiency of the service?
 - Is the selected penalty appropriate to the offense?



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ADMINISTRATIVE **HEARING PROCESS**

1. HRO requests a NGB hearing examiner.
2. A Pre-hearing may be held on the day before to identify any unresolved issues.
3. The hearing is held to decide three issues:
 - Did the technician do/or fail to do what they are charged with?
 - Will discipline resolve the issue?
 - Is the penalty appropriate?



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ADMINISTRATIVE **HEARING PROCESS**

4. The examiner prepares a report of their findings within 45 days of receipt of transcripts or hearing briefs
5. The Adjutant General will consider the findings of the examiner and provide a final decision. There is no further appeal.



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OTHER ISSUES TO CONSIDER

- The union may want to represent the appellant. This is an appropriate role.
- You must prove a clear relationship between the offense and the penalty selected.
- The Adjutant General may award attorney fees only if the technician is the prevailing party



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OTHER ISSUES TO CONSIDER

(CONTINUED)

- Disciplinary actions must be annotated on the technician's Supervisor Brief or NGB Form 904-1. Counseling, Warnings, and Oral Admonishments should only be penciled in.
- Was there a need to contact the EAP manager about the conduct?
- Did you consider informal mediation?



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OTHER ISSUES TO CONSIDER

(CONTINUED)

- Under no circumstances initiate an Adverse Action without the assistance of the HRO.

DOCUMENT!

DOCUMENT!

DOCUMENT!



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Questions

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Separating Employees



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Why is the Employee Separating?

- There are several types of separations we process
 - It's all in the details ... give us as much information as possible when submitting the SF52 Request for Personnel Action

Terminations:

Lack of Work
Lack of Funds
For Cause
(coordinated with LRS)
Transferring to Another
Agency
End of Temp. Appt.
During Initial Probation
Period

Resignations:

Going to School Full
Time
Accepted Other
Employment
Personal Reasons

Separation-US:

Taking an AGR
Tour/Other Military Duty
Assignment

***Just a Few Examples**

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Taking Care of the Employee

- Regardless of the reason for separation, we need to ensure we are **taking care of the employee** and going the extra mile if needed.
- **Offer resources** to the employee if you feel they may be needed: Military OneSource, Family Program, Yellow Ribbon etc.



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Supervisors Responsibilities

- SF-8 For Unemployment
 - Required to be provided to all separating employees **prior** to separation date
 - Will be found on HRO webpage
<https://www.pr.ngb.army.mil/hro/#>

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Updated Mailing Address

- Please ensure the employee writes their **CURRENT** mailing address on the **SF52** so HRO can send the separation packet with crucial information for the employee.



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VERA/VSIP

POC for all VERA/VSIP Actions
Deputy Director of Human Resources

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Voluntary Early Retirement Authority (VERA)

Purpose:

- To Allow Eligible Employees Not Facing Involuntary Separation to Retire Early Creating Vacancies That Can be Filled by Technicians Who May Otherwise be Separated or Down Graded



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Voluntary Separation Incentive (VSIP)

Purpose:

- To encourage eligible employees to retire or resign voluntarily for Federal Service
- Used on a very limited basis (RIF, Reorganization etc)
- Paid in Lump sum or in bi-weekly installments



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Questions?

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Retirements



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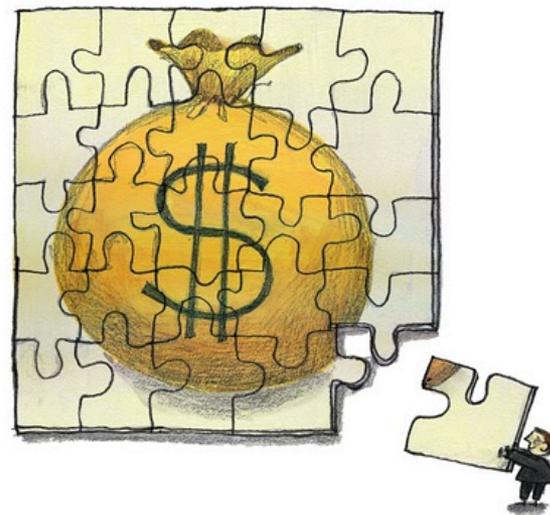


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Overview

- FERS/FERS-RAE/FERS FRAE
- Mandatory Contributions
- Computation of Retirement Annuity
- Crediting Non-Deduction Service
- Crediting Refunded Service
- Military Service Deposit
- Non-Pay Status
- Retirement Eligibility
- **Special provisions** for Military Reserve Technicians
- Death Benefits



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FERS/FERS-RAE/FERS FRAE

- Federal civilian employees first hired after December 31, 1983 are automatically covered by the Federal Employees Retirement System (FERS).
- Revised Annuity Employee (RAE) are employees hired on or after 1 January 2013 through December 31, 2013.
- Further Revised Annuity Employee (FRAE) are employees hired on or after 1 January 2014.

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FERS/FERS-RAE

- FERS/FERS-RAE/FERS FRAE is a three-tiered retirement plan consisting of these components:
 1. Government Annuity
 2. Social Security
 3. Thrift Savings Plan (TSP)
- The employee pays full Social Security taxes and a contribution to the FERS
- The agency contributes 1% of the employee's basic pay each pay period into their Thrift Savings Plan (TSP) and matches up to 4% of the employees contributions

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Mandatory Contributions

Retirement Group	Employee Contribution
FERS	0.8%
FERS-RAE	3.1%
FERS-FRAE	4.4%



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Computation of Retirement Annuity

- If the Retiree is:
 - Under age 62, or
 - Over age 62 with less than 20 years of total service1% of high-3 salary X years and months of service

- If the Retiree is:
 - At least age 62 or older, and
 - Has at least 20 or more years of total service1.1% of high-3 salary X years and months of service



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Civilian Deposits

- Non-Deduction Service
 - For Civilian Service Performed Before January 1, 1989
 - to include this service in the retirement annuity, the employee must make a deposit equal to the amount of the retirement deductions (plus interest)
 - For Civilian Service Performed After December 31, 1988 - this service is not creditable service for retirement eligibility.

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Redeposit



- Refunded Service
 - If the employee repays the refunded contributions (plus interest) - the service will be used to determine creditable years of service for retirement eligibility and the retirement annuity
 - If the employee does not repay refunded contributions - the service will be used to determine creditable years of service for retirement eligibility; however, it will not be used to compute the amount of your annuity

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Military Deposit

- Military service is creditable for retirement if:
 - It was active duty, **Title 10**, and,
 - It was **honorable service**, and
 - A **deposit is made**
 - The amount of the deposit is 3 percent of the basic pay earned during active military service
 - Interest begins to accrue 3 years after the individual was first employed, and is compounded annually until the deposit is paid in full



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Non-Pay Status

- Credit is given for periods **non-pay status** (e.g., leave without pay, suspension, and furlough) that **do not exceed a total of 6 months** in any calendar year
- Non-pay to perform **military service**
 - The employee **must make a deposit**
 - 3 percent of the military base pay, or
 - The amount the employee's contribution would have been if they had not entered into active military service

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Retirement Eligibility

- Eligibility is determined by:
 - Serving in a position covered by **FERS/FERS-RAE/FERS-FRAE**
 - **Age and years** of creditable service
 - At least **5 years** of creditable civilian service
- There are 4 categories of retirement benefits:
 - **Immediate Retirement**
 - Voluntary and MRA+10
 - **Early Retirement**
 - VERA and Discontinued Service
 - **Deferred Retirement**
 - **Disability Retirement**



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Age and Length of Service Requirements

Type of Retirement	Age	Years of Service	Special Requirements
Voluntary	62	5	None
	60	20	
	MRA	30	
MRA+10	MRA	10	Age reduction for under age 62
VERA	Any	25	Requires authority from NGB
	50	20	
Discontinued Service	Any	25	Separation cannot be for misconduct or delinquency
	50	20	
Deferred	62	5	
Disability	Any	18 months	

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Special Retirement Provisions

- Discontinued Service
 - A military reserve technician who is involuntarily separated is entitled to an immediate annuity after attaining:
 - 50 years of age and 20 years of service, or
 - Any Age and 25 years of service

FERS Annuity Supplement begins at MRA and continues thru age 62.

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Military Reserve Technician (MRT)

- Unique to FERS
- Involuntary Separation is based on loss of military membership only (not for cause)
- Eligibility to receive the FERS annuity supplement is immediate even if not at MRA.
- Age and service requirements are based on date of hire as follows:

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Military Reserve Technician (MRT), Cont.

First hired on/before 10 February 1996

- Unreduced benefits are available at the following age and service combination:
 - Age 50 with 25 years of creditable “Federal” service
 - Prior Title 10 active duty and/or temporary service performed prior to 1 Jan 1989 for which the employee completed a service deposit can be used to achieve the 25 years of creditable “Federal” service.

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Military Reserve Technician (MRT), Cont.

First hired after 10 February 1996

- Age 50 with 20 years of creditable “military technician” service, or
- Any age with 25 years of creditable “military technician” service**

** Other service creditable under FERS as well as prior Title 10 military service deposits cannot be used to achieve the minimum “military technician” years of service.

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Special Retirement Provisions



- Disability Retirement
 - A military reserve technician may retire under the disability provisions if:
 - They have at least 18 months of civilian service, and
 - The disability disqualifies the individual from membership in the National Guard, and
 - They are not entitled to an immediate annuity

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Death Benefits

- If an employee dies with 18 months of creditable civilian service:
 - Basic Death Benefit: a lump-sum payment equal to 50% the employee's high-3 salary plus \$15,000 increased by cost-of-living adjustments beginning December 1, 1987 (\$30,792.98)



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Death Benefits

- If the employees dies with 10 years of creditable service (18 months of civilian service)
 - Monthly survivor annuity – 50% of the employees earned annuity at the time of death; payable to a current or former spouse
- If a survivor benefit is not payable, a lump sum payment of the retirement contributions is paid to the eligible beneficiary

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Questions?



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