



FY 2026 PMAP Self-Assessment Guide

For AFGE Local 2883 members

Performance period: January 1 through September 30, 2026

Guide date: **October 5, 2026**

Overview:

On September 21, 2026, OPM issued a memo that set a performance rating level distribution cap of 40 percent for Level 4 and Level 5 ratings across all career SES, SP, and GS employees in each agency for FY 2026. The 40 percent cap for Level 4 and Level 5 ratings is a ceiling, not a target. It is applied at the agency level and is not a quota for each supervisor's team. There is no cap for any other performance rating level for FY 2026. At this time, it is not specified in HHS guidance whether a lower cap will be applied to CDC employees, given that Level 4 ratings are no longer in use at CDC.

CDC FTE employees have been instructed to complete their self-assessment in PMAS by **Friday, October 16, 2026**. Employees are required to describe their accomplishments under each performance element and provide an Overall Summary Narrative. Individual performance element entries have no character limit, whereas the Overall Summary Narrative has a 6,000-character limit, including spaces.

The employee's Rating Official (generally the employee's supervisor) will use the employee's self-assessment to create a 3,000-character summary narrative, assign preliminary ratings and factor scores, and rank all employees under their supervision. The Rating Official's summary narrative, preliminary ratings, factor scores, and employee rankings will then be sent to a Calibration Board for further review and assignment of the employee's final rating.

This guide explains the published process, as of October 1, in detail to assist CDC FTE employees with creating a strong self-assessment.

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1. What to do by October 16

In PMAS, click on your latest Performance Plan to open it. Review each performance element and the outlined performance standards carefully. Once you are ready to enter your self-assessment, click “Summary (Annual)” under “Create Appraisal” near the top of the screen.

On the Self Summary (Annual) Review screen, enter your accomplishments, results, and outcomes in the Rating Justification box under each performance element in your PMAP; those individual fields have no character limit. See Section 4 below for tips and examples for writing your self-assessment. New for FY 2026, you will not assign yourself a rating for each element.

Gather the strongest points from each performance element justification into the Overall Summary Narrative. This field is limited to 6,000 characters, including spaces; bulleted lists are allowed. You should describe your key accomplishments, results, and performance outcomes, aligning them to your performance elements and standards. New for FY 2026, you should also incorporate language that clearly explains and supports how your accomplishments align with the three HHS-wide calibration factors (see Section 3 below).

Submit your completed self-assessment to your Rating Official (typically your direct supervisor) in PMAS by **Friday, October 16**.

Your action checklist

1. Read your final FY 2026 performance plan, including every performance element and its corresponding Level 3 and Level 5 performance standards.
2. Gather evidence from the rating period: deliverables, approvals, quality checks, dates, workload records, feedback, and any interim appraisal or detail records.
3. In PMAS, enter your verified accomplishments under each performance element. State what you personally did, the outcome, and how it compares with the written standard; there is no character limit for these individual element entries. Every performance element is considered critical and requires you to write a self-assessment. See Section 4 below for tips and examples for writing your self-assessment.
4. Write an Overall Summary Narrative that demonstrates your strongest accomplishments and clearly connects them to the calibration factors of Organizational Value, Quality and Reliability, and Timeliness and Efficiency as applicable (see Section 3). This field is limited to 6,000 characters, including spaces.
5. Submit through PMAS by **October 16**.
6. Download a copy of your submission from PMAS (form HHS-704B).
7. If you disagree with your final rating (expected January 2027), you will have only **5 business days** to request reconsideration from your Component Performance Management Council.
8. If you have any questions, contact your supervisor and/or CIO performance management coordinator. Contact Local 2883 promptly if your plan or status is unclear.

Key dates published by HHS

Date	Published action
Oct 16, 2026	Employee self-accomplishment narratives are due to Rating Officials.
Oct 30, 2026	Rating Officials' preliminary element and summary ratings, factor assessments, narrative, and relative rankings due for review.
Nov 16 to Dec 30, 2026	Reviewing Officials, Pre-Calibration Verifiers, Component Calibration Boards, and Performance Management Councils review preliminary packages.
Jan 11, 2027	HHS Executive Governance Board completes final review, assessment, and approval of ratings distribution package.
Jan 29, 2027	Target date for Rating Officials to issue approved final ratings of record.

2. What happens next

Your Rating Official will review your self-assessment, assign individual performance element ratings and overall summary rating, create a summary narrative (up to 3,000 characters), assign a factor score for each of the three calibration factors, and assign a relative ranking (among all employees they supervise). Your self-assessment narrative supplies evidence for your Rating Official to consider but is **not** provided to the Calibration Board or senior leadership according to current documents. Additionally, you do not assign yourself any rating or score. The scores, ratings, and narratives prepared by the Rating Official are all considered preliminary, and Rating Officials have been instructed not to discuss these with or provide these to you before they are finalized by senior executive leadership.

Step 1. Rating Official reviews and rates each critical element

Element level	Points	Meaning in the published HHS guidance
Level 5: Outstanding	5.00	Performance significantly exceeds the applicable Level 3 requirements.
Level 3: Fully Successful	3.00	Performance consistently meets requirements.
Level 1: Unsuccessful	1.00	Performance does not meet the Level 3 expectations.

The Rating Official compares your actual work with the performance elements and standards in your performance plan, then assigns a rating to each element. All performance elements are considered critical and must be rated. Your summary rating is determined by the average of these individual element ratings. The average score is the sum of all your performance element points divided by the number of elements, rounded to no more than two decimals. An average of 4.60–5.00 results in a summary score of Level 5; an average of 3.00–4.59 maps to Level 3; and an average of 0.00–2.99 maps to Level 1. A rating of 1 in any performance element will automatically result in a Level 1 summary rating. See below for examples. The performance element ratings and your summary rating assigned by your Rating Official are all considered preliminary.

Example scenario	Arithmetic	Summary rating
Five total elements: four 5s, one 3	$(5+5+5+5+3) / 5 = 4.60$	Level 5: Outstanding
Four total elements: three 5s, one 3	$(5+5+5+3) / 4 = 4.50$	Level 3: Fully Successful
Four total elements: two 5s, one 3, one 1	$(5+5+3+1) / 4 = 3.50$	Level 1: Unsuccessful because one critical element is Level 1

Step 2. Rating Official assesses the three calibration factors

The Rating Official separately assigns you a preliminary score for the three Calibration Factors, listed as Organizational Value, Quality and Reliability of Demonstrated Performance, and Timeliness and Efficiency of Results (see Section 3 below). For each factor, your Rating Official will assign a score of 5 points (high calibration), 3 points (moderate), or 1 point (low). HHS guidance explicitly states that a Low factor score does not mean the employee is failing performance requirements. Factor scores are not the same as performance element ratings or the summary rating.

Step 3. Rating Official creates summary narrative

After carefully reviewing your self-assessment and the preliminary performance element ratings and calibration factor scores they assigned, your Rating Official will then create a summary narrative. This narrative has a limit of only 3,000 characters. This should describe your key accomplishments, results, and performance outcomes aligned to your performance elements and standards. It should also explain and support how your accomplishments align with the three calibration factors. Current guidance indicates that this summary narrative prepared by your Rating Official will accompany the preliminary ratings, calibration scores, and ranking for further review and assignment of your final score.

Step 4. Rating Official ranks employees

After assigning ratings to your performance elements and assessing the calibration factors, the Rating Official ranks all employees within their supervisory group highest-to-lowest with no ties. A rank of 1 of 5 means first ranked employee among five total employees.

Example rank	Meaning within a five-person supervisory group
1 of 5	First (highest) in the Rating Official's relative ranking order.
3 of 5	Third in that same order.
5 of 5	Fifth (lowest) in that same order.

Current guidance does not provide information on how rankings should be determined or how the rankings will be used to assign your final summary rating.

Step 5. Review, calibrate, and approve

The preliminary ratings, calibration factor scores, summary narrative, and ranking prepared by your Rating Official will be sent for further review before your final rating is assigned. A Reviewing Official (most often your supervisor's supervisor) may review preliminary packages. A designated Pre-Calibration Verifier will then review and assess these packages. Their recommendations are then sent to the Component Calibration Board, Performance Management Council, and, finally, the HHS Executive Governance Board. The Executive Governance Board completes the final review and assessment and provides final approval of the distribution package. Currently, HHS expects that you will receive your final rating at the end of January 2027. OPM says calibration panels should consider the fully rated population at Fully Successful and above, not only preliminary top ratings. Its Q&A describes factors as common criteria for comparing employees who have the same preliminary rating.

3. The three calibration factors

HHS has provided three calibration factors that are intended to provide a common comparison framework and do not replace the performance elements or standards in your performance plan. HHS has provided your supervisor an HHS Calibration Factors Guide by Grade Band to help them evaluate your work in relation to these calibration factors. While not required, we recommend incorporating the calibration factors in your self-assessment, and more importantly, your summary narrative to clearly identify to your Rating Official how your work relates to these factors. Use the definitions below to explain accomplishments you can substantiate. The evidence prompts and examples in this guide are intended as writing aids and are not HHS scoring thresholds.

Factor 1. Organizational Value

Measures the direct impact of work on organizational goals, including strategic alignment, operational transformation, and expansion of organizational capabilities. Key indicators are strategic goal advancement, operational transformation, capability expansion, and sustained or scalable impact.

Ask yourself	Evidence to locate
Which unit or agency objective did my work advance?	Approved plans, project charters, outcome reports, or decisions made using your work.
Did the work improve a process or expand what the team can do?	Adoption records, process measures, training materials, reusable tools, or stakeholder feedback.
Did a result last or spread beyond one task?	Repeat use, replication, new capability, or measurable continuing benefit.

Illustrative statement: 'I coordinated the survey and drafted recommendations that helped the branch choose training for program consultants. I identified where staff needed support, documented a repeatable process, and connected the recommendations to cooperative agreement oversight goals.' Include verified decisions, dates, and impact from your own work.

Factor 2. Quality and Reliability of Demonstrated Performance

Assesses the precision, technical rigor, and consistency of work products, with attention to error rates, compliance, and sustained high-quality delivery. HHS lists technical accuracy, error and rework rates, compliance with standards, and consistency of quality.

Ask yourself	Evidence to locate
How was the work checked and accepted?	Review sign-offs, validation results, audit findings, quality checks, or accepted deliverables.
Did I prevent or correct material errors or rework?	Before-and-after error counts, documented corrections, reconciliations, or review cycles.
Was reliable quality sustained across the period?	Recurring deliverables, compliance records, and feedback over time rather than one isolated success.

Illustrative statement: 'I reconciled financial records on schedule, identified discrepancies before reporting, and documented the corrections. My review helped the team give managers reliable balances for decisions.' Include the actual volume and error or rework evidence if your records support it.

Factor 3. Timeliness and Efficiency of Results

Evaluates the speed, resourcefulness, and reliability in delivering outcomes, including deadline adherence, efficient use of resources, and adaptability to changing demands. HHS lists deadline adherence, resource efficiency, adaptability, and sustained productivity as indicators.

Ask yourself	Evidence to locate
Which commitments were completed on time?	Milestone dates, delivery records, publication dates, or written acceptance.
How did I use time or resources more effectively?	Cycle-time comparisons, reduced handoffs, avoided rework, or capacity released for other work.
How did I adjust when priorities or resources changed?	Revised plans, documented tradeoffs, and maintained results through changing demands.

Illustrative statement: 'I introduced a shared submission process for newsletter ideas and photos, which helped the team keep the publication schedule moving when priorities changed. We released eight issues against a plan for six.' Include details of your specific role and retain records that support your claim.

Choose evidence, not adjectives

Key words such as 'strategic,' 'error-free,' or 'efficient' are strongest when followed by specific details identifying the work product, the comparison or standard, the date, and/or the result. A single achievement can support more than one factor, but you should try to identify multiple work products that relate to the calibration factors rather than relying on a single achievement. Make the relationship between each work product and factor explicit.

Sources for this section: [1] pp. 2-4, 7; [2] p. 2; examples adapted from writing approaches in [7] and [8].

4. Writing a strong self-assessment

Review your performance plan

Review the elements in your current performance plan in PMAS. Under each, identify the Level 3 requirements and the Level 5 performance standards. Do not paste your performance elements or

standards into your self-assessment as a substitute for evidence. Gather the evidence (emails, notes, outcomes) to help you explain how your actual work products and results compare with each element's quality, quantity, timeliness, or cost-effectiveness requirements.

Build each accomplishment from four parts

Part	What to write
Assignment or problem	State the goal or challenge briefly.
Your contribution	Use 'I' for what you personally did; explain your role when the outcome was a team effort.
Result	Give a verified output or outcome, preferably with a date, amount, baseline, and/or accepted product.
Why it matters	Connect the result to the performance standard and, where supported, to one or more calibration factors.

Compare: 'I participated in a workgroup' gives little to evaluate. A stronger version identifies the workgroup's objective, your assigned or volunteered work, the resulting product, or verified improvements. Do not invent an outcome or number to make an example seem stronger.

Draft your self-assessment

- Draft your self-assessment in Word or another text editor rather in PMAS. This will allow for easier editing and review of your assessment, including checking your grammar, spelling, and word count, before submission.
- For each individual performance element, draft your self-assessment. There is no character limit for these sections.
- Include specific details of each work product to provide evidence for your claims. Quantify outcomes where possible. Give context for difficult work or changing priorities without claiming credit for others' work. Do **NOT** simply make up data to support your claims.
- What you write in your self-assessment should clearly meet the defined performance standards for either the 3 or 5 level.
- Although you cannot give yourself a rating, you can begin your assessment with wording such as, "During 2026, I met the standards for Outstanding performance in this element." Use adjectives and key words from those standards and combine it with your specific accomplishments to create your self-assessment.
- A strong self-assessment focuses on
 - Accomplishments, results, and impacts, rather than listing a series of tasks
 - Performance indicators that clearly connect to the performance standards
 - Challenges overcome and added value

- Select your strongest accomplishments, results, and outcomes to include in your Overall Summary Narrative. This field is limited to only 6,000 characters, including spaces.
- Briefly address each performance element and summarize how the documented results advanced organizational goals, maintained reliable quality, and met deadlines or used resources well.
- Write your Overall Summary Narrative such that someone outside of your work unit can understand your accomplishments and why they are important.
- Carefully review your final draft for completeness, accurate information, and spelling and grammar. Check the character count of the Overall Summary Narrative.
- Paste your drafted self-assessment from Word into PMAS and do a final review to ensure accuracy and completeness.
- Submit your self-assessment in PMAS by October 16. Download the resulting HHS-704b form.
- Keep a longer evidence record for yourself and your discussion with your Rating Official.

Use AI as an editing aid

AI tools such as ChatGPT can be an excellent way to help you refine your self-assessment and meet the character limit for the Overall Summary Narrative. Follow HHS rules for approved tools and protected information; do not place sensitive, personal, or nonpublic work information into a tool unless authorized. Give an AI tool only facts you may share; ask it to preserve your meaning, and verify every date, number, claim, and attribution included in the final product. You remain responsible for accuracy.

One example writing prompt could be: 'Shorten this Overall Summary Narrative to no more than 6,000 characters including spaces. Preserve verified results, distinguish my work from team results, include the three HHS calibration factors, and do not invent metrics or outcomes.'

Sources for this section: [1] pp. 2-3; [2] p. 2; [3] pp. 14-16; [6] pp. 1-3; [7] pp. 1-3; [9] pp. 1-4; [12] CDC email, October 1, 2026.

5. Special situations and final ratings

Approved and protected leave

HHS's PMAP handbook says employees should not be held accountable for work not done during approved leave; a time-dependent standard may be prorated for time worked. The September closeout memo gives extra instructions for employees on protected leave: Rating Officials should contact them during normal duty hours, offer the option to submit a narrative, and allow submission in a Word document from a personal email if they cannot access a government account. The employee must be allowed to come off protected leave to do this work and then resume the protected status. Keep a record of the offer and your response. If the discussion occurs via phone call, follow-up with a written email to confirm the details.

Details, interim appraisals, and short service

HHS policy calls for interim appraisals to be considered in the final rating. If you changed supervisors or served a detail of 90 days or longer, gather the plan and documented accomplishments from each assignment and ask that the Rating Official obtain relevant supervisory input. OPM clarifies that a prior supervisor's performance evaluation is transferred as input; the supervisor of record at the end of the period assigns the preliminary rating. HHS policy's minimum appraisal period is 90 calendar days under a documented plan. If your plan or rating period is unclear, seek a written explanation from HR and contact Local 2883 promptly.

If you were already rated or separated

HHS guidance specifies that covered employees who already received a FY 2026 summary rating must still submit an updated FY 2026 closeout narrative and undergo the new closeout process. Employees who separated before September 30 or before final ratings are approved and issued will not receive a FY 2026 rating of record. If either situation applies, preserve the relevant notices and seek individual advice about your status.

When the final rating arrives

Preliminary ratings, factor scores, and ranks are not final and should not be communicated to you before HHS approval. When you receive the approved final rating, compare it with your plan, narrative, and evidence. The September HHS memo sets a deadline of five business days after receipt of the final rating to request reconsideration to the Component Performance Management Council. Additional details regarding the request for reconsideration were forthcoming as of the date of the creation of this guidance. Contact your Rating Official, HR, and Local 2883 promptly and preserve written proof of timely filing. Local 2883 has no current CBA grievance route for your rating. OPM's Q&A says agency reconsideration may change a rating and that EEO, whistleblower, and prohibited-personnel-practice complaint rights remain separate; ask for advice about the applicable process and deadline if one of those issues arises.

Sources for this section: [1] pp. 3-6; [2] p. 3; [3] pp. 5-7, 14-17; [4] p. 52; [5] pp. 17-21; [11] pp. 6-7, 9, 11-12. Later September HHS guidance controls where earlier materials differ.

Sources used for member-facing content

- [1] HHS Human Capital Management Letter 0006-26-PMA, FY 2026 Performance Management Closeout Guidance for Non-SES and Equivalent Employees - Phase 1, September 29, 2026, pp. 1-8.
- [2] HHS Attachment A, Closeout Email for Covered Non-SES and Equivalent Employees, September 2026, pp. 1-3.
- [3] HHS Human Resources Policy 430-2, Performance Management Appraisal Program, effective February 24, 2026, especially pp. 2-3 and 14-17.

- [4] HHS PMAP Handbook, Resource Guide for Supervisors and Employees, especially p. 52 on approved leave. Earlier handbook statements are used only where consistent with the September memo.
- [5] AFGE Local 2883, PMAP Tips and Tricks, August 19, 2026, especially pp. 10-15 and 17-21.
- [6] AFGE Local 2883, Handout 1, Key Performance Management Terms, August 2026, pp. 1-3.
- [7] AFGE Local 2883, Handout 2, Tips for Writing Your Self-Assessment, August 2026, pp. 1-3.
- [8] AFGE Local 2883, Handout 3, Sample Self-Assessments, August 2026, pp. 1-3.
- [9] AFGE Local 2883, Handout 4, Guidance for Using AI To Write Your Self-Assessment, August 2026, pp. 1-4.
- [10] U.S. Office of Personnel Management, FY 2026 Standardized Distribution of Rating Levels and FY 2026 Performance Awards Guidance for Federal Employees, September 21, 2026, especially pp. 2-4.
- [11] U.S. Office of Personnel Management, Questions and Answers on 5 CFR part 430, subpart B Final Regulations, updated September 21, 2026, especially pp. 1, 4-7, and 11-12.
- [12] CDC OD Announcements, FY 2026 PMAS Closeout Updates, email to the CDC-wide distribution list, October 1, 2026.

Useful links

[HHS PMAP policy](#) | [HHS performance management resources](#) | [OPM FY 2026 distribution guidance](#)
[Request Local 2883 representation or assistance](#) | Email: info@afge2883ga.org