

CHRIS Self Service

Updating an Existing Plan –Add/Delete Element Measures

Introduction

The current version of the CHRIS APPAS module has been built using Oracle Self-service technology. The user will access all performance plan functions from the Main Plan Information screen. The user can update an existing performance plan using the Update Plan/ Change Appraiser icon.

Guide Contents

This guide provides instructions on how to add and delete element measure data from an existing plan.

Updating an Existing Plan –Add/Delete Elements Measures

Step 1

If you are a manager select GSA Manager Self-Service from the menu and then click on Build Performance Plan (APPAS) in the right hand column.

All other users select GSA Build Performance Plan and click on Build Performance Plan (APPAS) in the right hand column.

Navigator

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<ul style="list-style-type: none"> GSA HR Professional Self-Service GSA Manager Performance Plan <li style="background-color: #e0e0e0;">GSA Manager Self-Service GSA Personal Self-Service 	<p>GSA Manager Self-Service</p> <ul style="list-style-type: none"> Manager View Build Performance Plan (APPAS) Appraisals (APPAS) Awards Change Password and Accessibility Inbox <p>Help</p> <ul style="list-style-type: none"> Build Performance Plan User Guide Appraisal (APPAS) User Guide Award (APRS) User Guide
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Important: The Internet Explorer or Netscape Back  button **SHOULD NOT** be used in this system to navigate between pages. Using the button will cause the system to not function properly.

Step 2

The Plan Information screen appears and provides two options for searching for an employee's existing performance plan by name.



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Plan Information

To BUILD A NEW PERFORMANCE PLAN for an associate, click on 'Build Performance Plan'.
To WORK WITH AN EXISTING PERFORMANCE PLAN, use the SEARCH function explained below to find the plan. [Build Performance Plan](#)

WORKING WITH EXISTING PLANS:

- To search for a specific Performance Plan, first select the employee's name by using the flashlight OR by entering the employee's last name, first name in the space provided and clicking on the GO button.
- To narrow your results to a specific date range, enter a date range and click GO.
- To view all performance plans for which you are the MAIN APPRAISER, leave all fields blank, check the box next to "Plans where you are the Main Appraiser" and click GO.

OPTIONS AVAILABLE FOR THE RECORDS SELECTED:

- To make changes to an existing plan click on the UPDATE PLAN/CHANGE APPRAISER icon.
- To copy an existing plan, select the COPY icon and follow the instructions.
- To view detailed information about a plan, select the DETAILS icon.
- To view or print the worksheet or form, click on the appropriate icon.
- To write comments and/or issue critical element ratings for the mid-year progress review, click on the CREATE MID-YEAR icon and then go to APPRAISALS (APPAS).
- To evaluate performance at the end of the rating period, click on the CREATE APPRAISALS icon and then go to APPRAISALS (APPAS).
- To delete the selected plan, use the DELETE icon.

Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name

Rating Period End Date between

(example: 28-Jul-2006)

Plans where you are the Main Appraiser

* Effective Date

(example: 28-Jul-2006)


Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Copy Change Appraiser	Details WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
No search conducted.											

[Build Performance Plan](#)

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You can enter the employee's last name in the Name field and hit the tab key or click on the Flashlight icon  .

Search


Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.


Name 

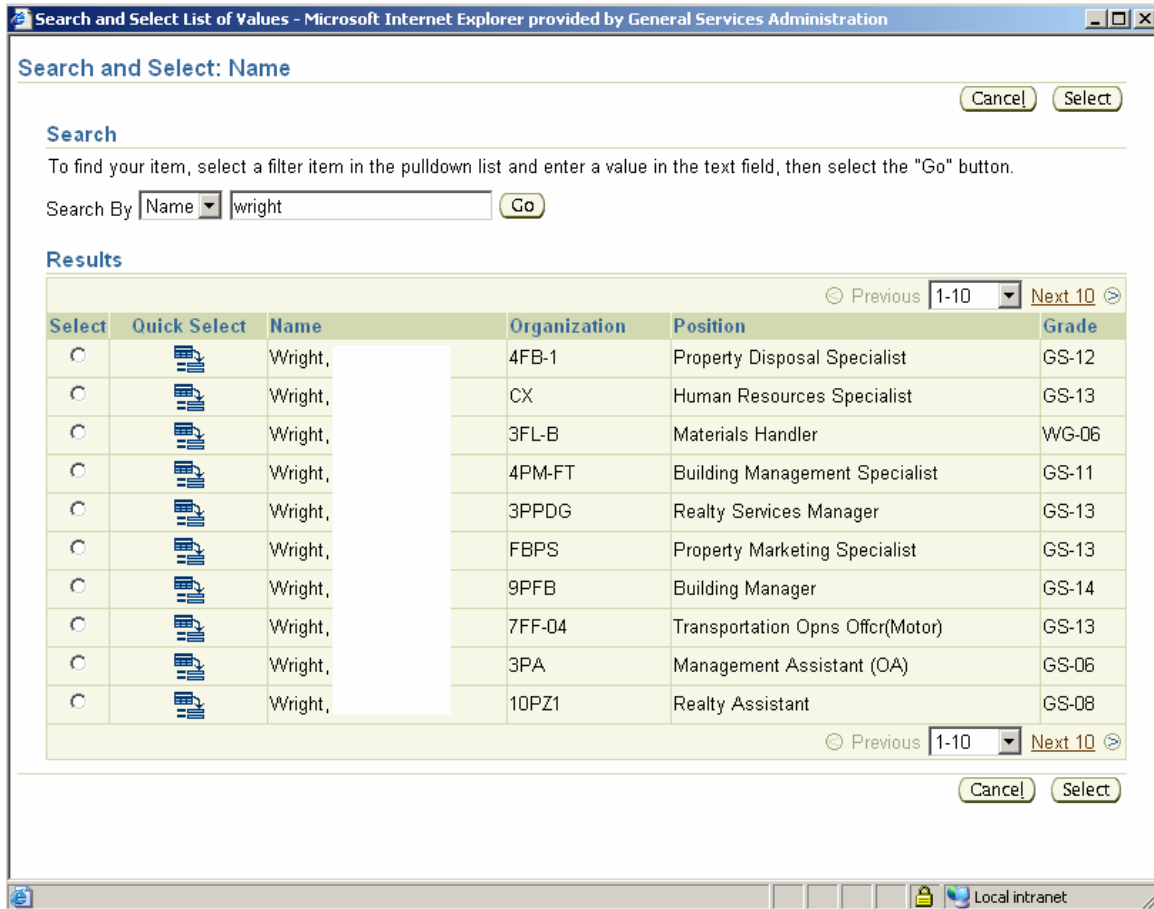
Rating Period End Date between 
 (example: 25-Jun-2006)


 (example: 25-Jun-2006)

Plans where you are the Main Appraiser

* Effective Date 
 (example: 25-Jun-2006)

This will take you to the Search and Select: Name screen. Identify the correct employee and click on the Quick Select icon  . This will populate the Name field on the Plan Information screen.














Search and Select: Name



Search
 To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.


Search By

Results

Select	Quick Select	Name	Organization	Position	Grade
<input type="radio"/>		Wright,	4FB-1	Property Disposal Specialist	GS-12
<input type="radio"/>		Wright,	CX	Human Resources Specialist	GS-13
<input type="radio"/>		Wright,	3FL-B	Materials Handler	WG-06
<input type="radio"/>		Wright,	4PM-FT	Building Management Specialist	GS-11
<input type="radio"/>		Wright,	3PPDG	Realty Services Manager	GS-13
<input type="radio"/>		Wright,	FBPS	Property Marketing Specialist	GS-13
<input type="radio"/>		Wright,	9PFB	Building Manager	GS-14
<input type="radio"/>		Wright,	7FF-04	Transportation Opns Offcr(Motor)	GS-13
<input type="radio"/>		Wright,	3PA	Management Assistant (OA)	GS-06
<input type="radio"/>		Wright,	10PZ1	Realty Assistant	GS-08

To narrow your results to a specific date range, enter a starting and ending value in the Rating Period End Date fields. Click on the Go button  .

Rating Period End Date between 
 (example: 25-Jun-2006)
 
 (example: 25-Jun-2006)

To limit your search to performance plans where you are the main appraiser, click on the “Plans where you are main appraiser” box and click on the go button  .


Plans where you are the Main Appraiser



Based upon the criteria that you have entered the Plan Information screen will populate with Performance Plans. For each performance plan there are multiple function buttons.

Step 3


Verify that that you have the right plan be verifying the Rating Period Start and End Dates. Click on the Update/Change Appraiser icon.

































































Search
 Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name 

Rating Period End Date between 
 (example: 25-Jun-2006)
 
 (example: 25-Jun-2006)

Plans where you are the Main Appraiser

* Effective Date 
 (example: 25-Jun-2006)

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update / Change Appraiser	Details WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
		Plan in Progress	Annual	01-Oct-2007	30-Sep-2008	 	 				
		Ongoing	Annual	01-Oct-2007	30-Sep-2008	 	 				
		Plan in Progress	Annual	01-Oct-2006	30-Sep-2007	 	 				
		Plan in Progress	Interim	01-Oct-2006	30-Sep-2007	 	 				
		Completed	Annual	01-Oct-2005	30-Sep-2006	 	 				
		Completed	Annual	01-Oct-2005	30-Sep-2006	 	 				
		Completed	Annual	01-Oct-2004	30-Sep-2005	 	 				
		Planned	Annual	01-Oct-2004	30-Sep-2005	 	 				

Step 4

From the plan information screen click on the Critical Element button to get to the Critical Element Information screen.

Critical Element

Plan Information

Name: _____

Performance Plan Form: Non-supervisory Associates

Rating Period Start Date: 01-Oct-2005

Rating Period End Date: 30-Sep-2006

Performance Plan Issue Date: _____

Mid Year Review Date: _____

Man Appraiser: _____

Performance Plan Type: Annual

Assignment Type: Primary

Appraisal Date: _____

PD Review Date: _____

Unratable Information

Unratable

Unratable Reason: _____

Back Save Critical Element

Step 5

Listed are each of the critical elements assigned to this performance plan. If you want to make any changes to the Element Measure details for a specific critical element click on

Measure Details

the Measure Details icon  in that row.

Critical Element Information

Return to Plan Information Preview Back Save

Click on the Add Critical Element button.
Enter Critical Element #, Critical Element Name, % weighting
To add Specific Measures click on the Measure Details icon.
Click on the Preview button to review plan entries.

Plan Information

Name: _____ Form: Non-supervisory Associates

Rating Period Start Date: 01-Oct-2005 Performance Plan Type: Annual

Rating Period End Date: 30-Sep-2006

Critical Elements

Details Group	CE #	CE Name	%	Measure Details	Delete
Critical Elements	1	Workload Management	40		
Critical Elements	2	Budget Management	40		
Critical Elements	3	Customer Service	20		

Add Critical Element

Step 6

The screen will now display the Element Measure details for the Critical Element selected. The General Measure, Specific Measure, Derived From and Feedback Source fields are each editable and can be changed by entering new or revised values directly in to each field.

Plan Information

Name		Form	Non-supervisory Associates	
Rating Period Start Date	01-Oct-2006	Performance Plan Type	Interim	
Rating Period End Date	30-Sep-2007			

Critical Element Information

Group	Critical Elements	Critical Element Name	work	
Critical Element #	1	Critical Element Percentage	50	

Measure Information

Select	Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
<input checked="" type="radio"/>	1	work	work	feedback	feedback		
<input type="radio"/>	2	play	play	play	play		

[Add New Measure](#)


You are currently working on measure 1

Level Information

Level Description

1	Does not meet performance expectations as defined in Level 3
2	Partially meets performance expectations as defined in Level 3
3	Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.
4	Meets and often exceeds performance expectations as defined in Level 3
5	Meets and consistently exceeds performance expectations as defined in Level 3

[Back](#) [Save](#)

If you want to delete a particular set of measures, click on the Delete icon  on the right hand side of the row.

If you want to add an additional set of measures for a critical element you can click on the Add New Measure button [Add New Measure](#).

Enter the General Measure, Specific Measure, Derived From and Feedback Source in the appropriate fields. If you have multiple sets of measure information for a single critical element you can use the Measure% field to enter the weighting percentage for each set. None of the fields in this section are required but if you use the Measure% field the total for all measure information for any one critical element must equal 100%.

Measure Information

Select	Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
<input checked="" type="radio"/>	1						

[Add New Measure](#)

Level Information

Just below the measure information section is the Level Information section for the Element measures you are building. Each of the five rating levels comes auto-populated with the default APPAS descriptions. These are editable fields and text can be edited through the user's keyboard or by cutting and pasting from external programs such as Microsoft Word.

Level Information

Level	Description
1	Does not meet performance expectations as defined in Level 3
2	Partially meets performance expectations as defined in Level 3
3	Meets performance expectations. Objectives, activities, and specific tasks associated with each critical element are carried out with expected levels of quantity, quality, timeliness and cost-effectiveness in accordance with performance plan. Responsibilities are carried out in accordance with all official guidance, policies, and applicable laws, rules and regulations.
4	Meets and often exceeds performance expectations as defined in Level 3
5	Meets and consistently exceeds performance expectations as defined in Level 3

Important: Please note that if you enter a value in then Measure % field, it will not be calculated to determine the summary rating. This is only for the appraiser's use in determining the rating and for display purposes on the Worksheet. Only the Critical Element % will be calculated for the Summary Rating.

Measure Information

Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
1	Workload Mangement	Quality	PD	Supervisor	40	
2	Workload Mangement	Quantity	PD	System Reports	40	
3	Workload Mangement	Timeliness	PD	System Reports	20	

When you have finished entering all of the data to change the Element Measures, click on the Save button to return to the plan Information screen.

When you are finished adding or deleting critical elements click on the Return to Plan Information button to return to the Main Plan Information screen.

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