

## **CHRIS Self Service**

### **How to Generate a Worksheet and Appraisal Form**

#### **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 generate a PDF document of both the official APPAS worksheet and the APPAS Appraisal form. Both of these documents are updated in real time as information is entered in the Build Performance Plan and Appraisals (APPAS) module.

#### **Guide Contents**

This guide provides instructions on how to generate a PDF document of the official Appraisal form and worksheet.

## How to Generate a Worksheet and Appraisal Form

### 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"> <li><a href="#">GSA HR Professional Self-Service</a></li> <li><a href="#">GSA Manager Performance Plan</a></li> <li><a href="#">GSA Manager Self-Service</a></li> <li><a href="#">GSA Personal Self-Service</a></li> </ul>	<p><b>GSA Manager Self-Service</b></p> <ul style="list-style-type: none"> <li><a href="#">Manager View</a></li> <li><a href="#">Build Performance Plan (APPAS)</a></li> <li><a href="#">Appraisals (APPAS)</a></li> <li><a href="#">Awards</a></li> <li><a href="#">Change Password and Accessibility</a></li> <li><a href="#">Inbox</a></li> </ul> <p><b>Help</b></p> <ul style="list-style-type: none"> <li><a href="#">Build Performance Plan User Guide</a></li> <li><a href="#">Appraisal (APPAS) User Guide</a></li> <li><a href="#">Award (APRS) User Guide</a></li> </ul>
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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.
- 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)

  
(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  

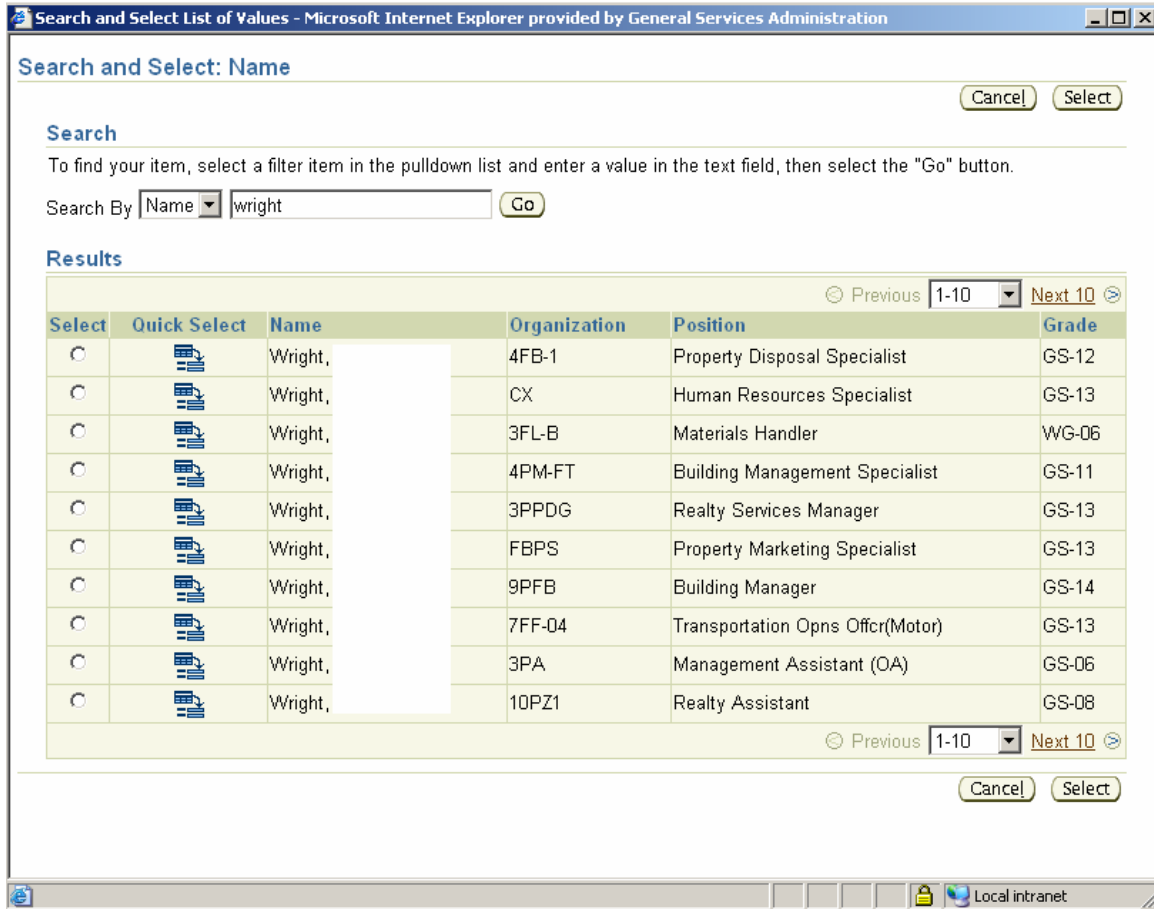
Rating Period End Date between    
 (example: 25-Jun-2006)

  
 (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 Name


**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

### Step 3

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.




























































**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 3



Click on the Worksheet icon to view a PDF version of the GSA Worksheet populated with the selected performance plan's details.

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update / Change	Copy Appraiser	Details Worksheet	Perf. Plan Mid-Year	Create Appraisal	Delete
		Plan in Progress	Annual	01-Oct-2007	30-Sep-2008						

A Separate Window will open with the Worksheet in PDF format. Using the Adobe tool bar you can print from this screen or save copy to your desktop. Close out of the document to return to the Main Plan Information screen.

#### Associate Performance Planning Worksheet – Non-supervisory Associates

Employee Name: Position: Administrative Support Asst (OA), GS-0303-07 Organization: 6PE  
 Main Appraiser: Date Developed: 13-JAN-2006 Date Issued: 01-OCT-2005

#### Critical Element: Customer Relationship Management(50%)(50%)

Description: Customer Relationship Management(50%)

Derived From	General Measure	Specific Measure	Level 1	Level 2	Standards/Exception	Level4	Level5	Feedback Source For Monitoring
	Quality Timeliness	Proactive responsive follow-up.	Rarely responsive. Rarely follow-up or proactive.	Responsive some of the time; follow-up and proactive some of the time.	Consistently responsive to internal and external customers. Works to facilitate the needs of Branch Managers and associates on a daily basis. Travel Arrangements including scheduling flights and travel vouchers for Director Coordinate Conferences/Meetings both on-site and off-site. Schedule New Associate Interviews.	Follows-up and is proactive most of the time.	Responsive at all times; follow-up and proactive at all times.	Customer Satisfaction Surveys, Team peer Feedback, Supervisory observations and feedback
	Quantity	Provides helpful service to public and builds good relationships	Numerous customer complaints per rating period	Some customer complaints per rating period			No valid customer complaints per rating period	

**Step 4**



Click on the Performance Plan Form icon to view a PDF version of the GSA Performance plan form populated with selected performance plan's details.

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update / Change	Copy Appraiser	Details Worksheet	Perf. Plan Mid-Year	Create Appraisal	Delete
		Plan in Progress	Annual	01-Oct-2007	30-Sep-2008						

A Separate Window will open with the Performance Plan form in PDF format. Using the Adobe tool bar you can print from this screen or save copy to your desktop. Close out of the document to return to the Main Plan Information screen.

Performance Plan and Appraisal Record for Non-supervisory Associates			
Part I Administrative Data			
a. Associate Name (Last, First, MI)	b. SSN	c. Pay Plan, Series & Grade	d. Office Symbol
		GS-0201-15	0221
e. Organization		f. Rating Period Covered (MM/DD/YYYY – MM/DD/YYYY)	
		10/01/2005 - 09/30/2006	
Part II Position Description Review Certification			
I certify that I have reviewed the associate's position description. If I do not believe it is an accurate statement of the major duties and responsibilities of the position, I have initiated appropriate action.			
Position Description has been reviewed		◇	Initial and Date: _____
Part III Performance Plan and Appraisal Instructions			
<b>INSTRUCTIONS:</b>			
A performance plan must be issued to the associate at the beginning of each rating period. These plans may be modified during the performance cycle, but associates must perform under a documented performance plan for a minimum of 120 days before they can be rated.			
Development of the performance plan should be a collaborative endeavor between the supervisor and the associate. The performance plan for each associate must contain critical elements, and may contain non-critical elements. Critical elements are work assignments or responsibilities or such importance that unsatisfactory performance on the element would result in a determination that an associate's overall performance is unsatisfactory. Objectives, activities, and tasks should be identified under each critical element.			
Performance will be measured against 5 levels, as follows:			
Level 5 – Meets and consistently exceeds performance expectations as defined in Level 3			
Level 4 – Meets and often exceeds performance expectations as defined in Level 3			

**Important:** Once you have created an appraisal you can now print the form directly from the Appraisals (APPAS) function.

*How to Generate a Worksheet and Appraisal Form*