

CHRIS Self Service

Updating an Existing Plan – Entering Plan Dates

Introduction

The current version of the CHRIS APPAS module has been built using Oracle Self-service technology. Throughout the rating period it may be necessary to update some of the date fields in the performance plans. The Performance Plan Issue Date, Mid-Year Review Date, Appraisal Date and PD Review Date fields can now be entered from the Build Performance Plan function.

Guide Contents

This guide provides instruction on how to update and enter performance plan and appraisal dates through out the year.

Updating an Existing Plan –Entering Plan Dates

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

[Edit Navigator](#)

<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
--	---

[Home](#) | [Logout](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

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.



U.S. General Services Administration
Human Resources

[Home](#) [Logout](#)

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](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Home](#) | [Logout](#) [Privacy Statement](#)


Updating an Existing Plan- Entering Plan Dates


Page 2 of 4
Created on 7/31/2006 5:18:00 PM


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 List of Values - Microsoft Internet Explorer provided by General Services Administration

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



Previous 1-10 Next 10


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

Previous 1-10 Next 10

Local intranet

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

Through out the rating period it may be necessary to update certain fields in the


performance plans. Click on the Update Plan/Change Appraiser icon  for the selected employee.

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						

In the Plan Information section you can update/enter the Performance Plan Issue Date, Mid-Year Review Date, Appraisal Date and PD Review Date fields.

Plan Information


Name:


Main Appraiser: 


Performance Plan Form:


Performance Plan Type:


Assignment Type:


Rating Period Start Date: 

Rating Period End Date: 

Performance Plan Issue Date: 




Mid Year Review Date: 


Appraisal Date: 


PD Review Date: 

Use stable information: Unstable

Unstable Reason:

These can be entered by typing directly in to the field or by clicking on the calendar function icon. 

Once you have made your entries, click on the Save button  before exiting.

Updating an Existing Plan- Entering Plan Dates