

CHRIS Self Service

Updating an Existing Plan –Add/Delete Critical Elements

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 instruction on how to add and delete critical elements from an existing plan

Updating an Existing Plan –Add/Delete Critical Elements

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 

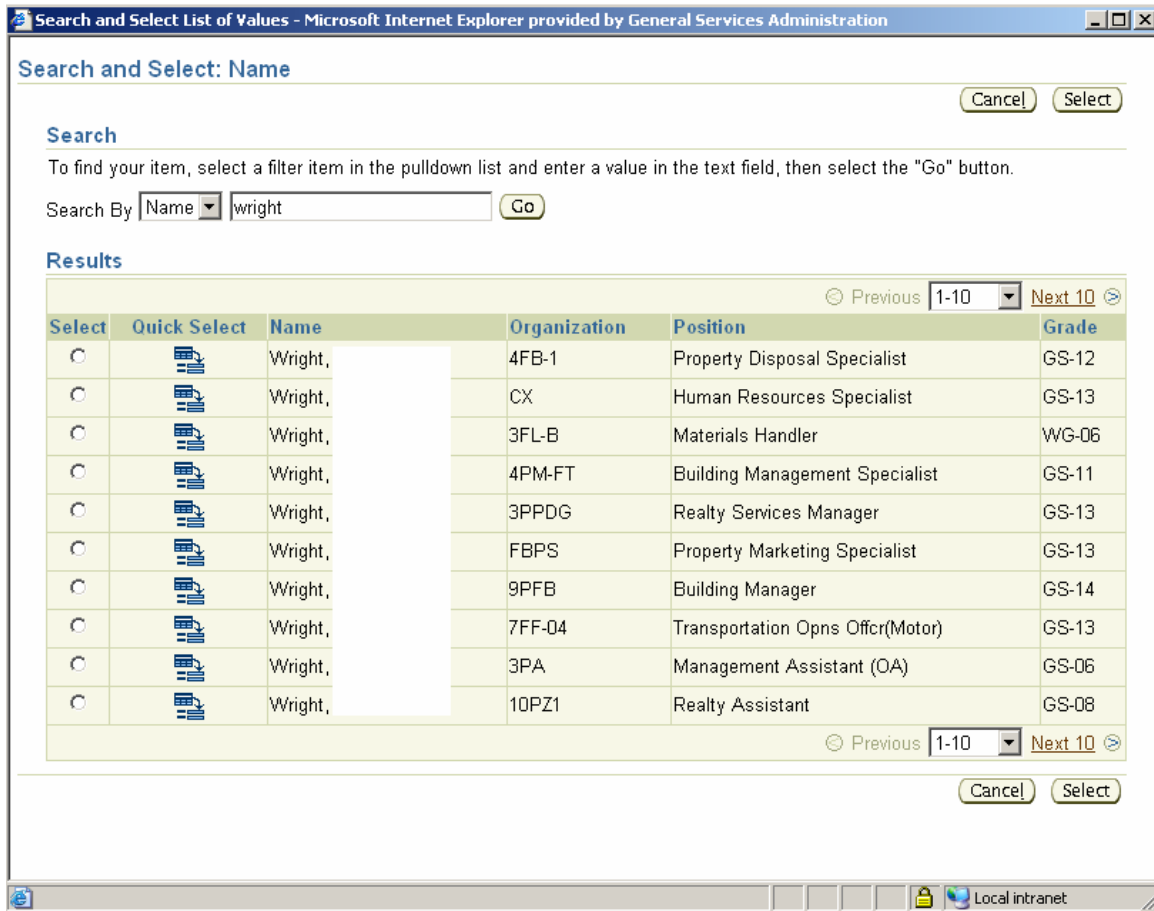
Rating Period End Date between 
 (example: 25-Jun-2006)


 (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











Cancel Select

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 wright Go



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

Previous 1-10 Next 10

Cancel Select

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: Unratable


Unratable Reason: _____

Back Save Critical Element

Step 5

Listed are each of the critical elements assigned to this performance plan. The CE #, CE Name and % fields are each editable and can be changed by entering new or revised values directly in to each field.

Delete

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

If you want to add a critical element you can click on the Add Critical Element button

Add Critical Element

Critical Element Information

*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.*

Return to Plan Information Preview Back Save

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

Updating an Existing Plan – Add/Delete Critical Elements

Important: Remember when making any changes that the total critical element weighting must still equal 100%

Step 6

The critical element Group name will default according to the type of Performance Plan form selected. Assign a number to the Critical Element in the CE# field, enter the Critical Element Name in the CE Name field and assign the appropriate weighting percentage in the % field.


The large text box just below these fields is for the Critical Element description. This field comes auto-populated for the Non-SES Management and Supervisory Associates form and optional for all others. This is an editable field and text can be entered through the user's keyboard or by cutting and pasting from external programs such as Microsoft Word.

Details Group	CE #	CE Name	%	Measure Details	Delete
▼ Critical Elements	1	Workload Management			

Step 7

You can add specific measure details for each critical element by clicking on the

Measure Details

Measure Details icon  of the critical element you are currently working on. The screen will now display the Measure Information section for the Critical Element you are building. 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%.

Plan Information
 Name: Non-supervisory Associates
 Rating Period Start Date: 01-Oct-2005
 Rating Period End Date: 30-Sep-2006
 Performance Plan Type: Annual

Critical Element Information
 Group: Critical Elements
 Critical Element Name: Workload Management
 Critical Element #: 1
 Critical Element Percentage: 40

Measure Information

Select Measure #	General Measure	Specific Measure	Default From	Feedback Source	Measure % Weight
Add New Measure					

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

Control Save


Step 8

Just below the Measure Information section is the Level Information section for the Critical Element 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

In the case that you have multiple sets of measure details for the critical element you are building you can add additional sets of measure details by clicking on the Add New Measure button .

Measure Information

Select	Measure #	General Measure	Specific Measure	Derived From	Feedback Source	Measure %	Delete
<input checked="" type="radio"/>	1	Workload Mangement	Quality	PD	Supervisor		
<input type="radio"/>	2	Workload Mangement	Quantity	PD	System Reports		
<input type="radio"/>	3	Workload Mangement	Timeliness	PD	System Reports		


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




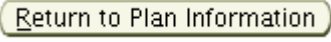
By clicking on the Select button  next to the measure, you can edit the level descriptions.

Also 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.

Level 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 build your additional Critical Element, 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.