

# **CHRIS User Guide: Completing an Annual Appraisal**

**CHRIS Responsibility Required: Manager Self-Service**

## **Module Overview**

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### **Purpose**

As part of the automation of the APPAS policy, supervisors can manage performance evaluations and appraisals through CHRIS Self-service. This automation includes issuing performance plans, and conducting mid-year/interim/annual appraisals. Once the annual appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the annual in the Appraisals section of APPAS. This guide offers instructions for completing the annual appraisal.

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### **Chapter Contents**

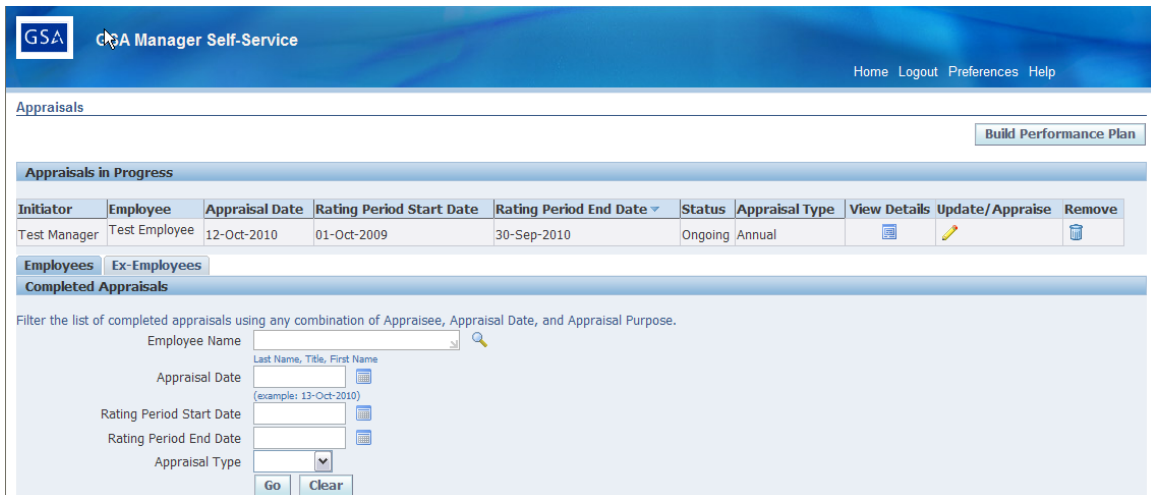
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## Locating the Appraisal


After logging in to CHRIS, click on the **GSA Manager Self-Service** responsibility, then select the **Appraisals (APPAS)** menu option.

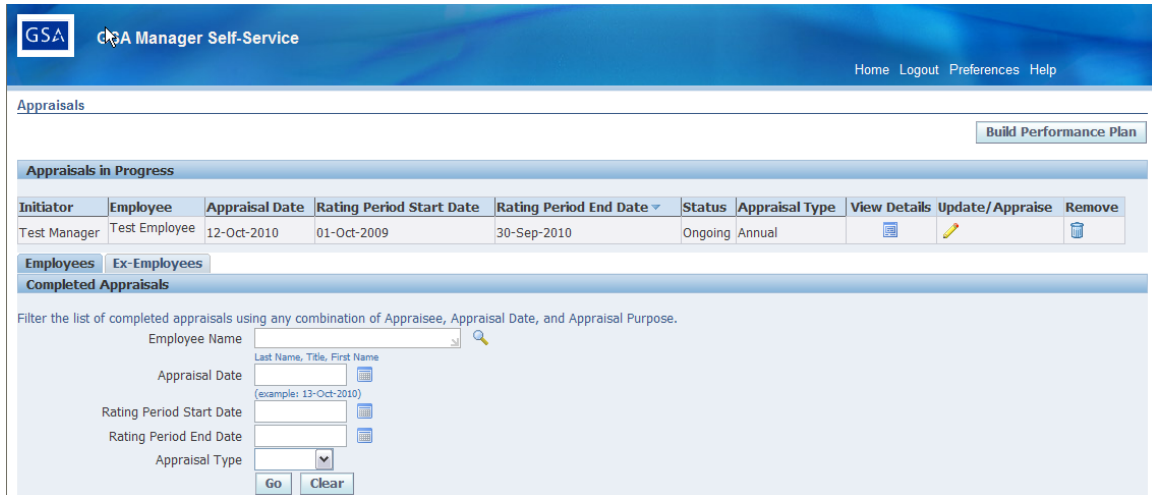


This will take you to the **Appraisals** screen, which is separated into two sections: **Appraisals in Progress** and **Completed Appraisals**. **Appraisals in Progress** gives you a list of Appraisals that you created in **Build Performance Plan**. These are the appraisals we will be working with, in this user guide.






## Completing the Appraisal

To begin the process of completing the appraisal, select the **Update/Appraise** icon , in the row of the respective employee.




The screenshot shows the 'Appraisals' section of the GSA Manager Self-Service interface. At the top right, there are links for 'Home', 'Logout', 'Preferences', and 'Help'. Below the header, there is a 'Build Performance Plan' button. The main content area is divided into two sections: 'Appraisals in Progress' and 'Completed Appraisals'.


**Appraisals in Progress**


Initiator	Employee	Appraisal Date	Rating Period Start Date	Rating Period End Date	Status	Appraisal Type	View Details	Update/Appraise	Remove
Test Manager	Test Employee	12-Oct-2010	01-Oct-2009	30-Sep-2010	Ongoing	Annual			


**Completed Appraisals**

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.


Employee Name    
Last Name, Title, First Name

Appraisal Date    
(example: 13-Oct-2010)

Rating Period Start Date  

Rating Period End Date  

Appraisal Type

The **Update Appraisals: Overview** screen allows the user to modify the **Appraisal Type, Rating Period End Date, Appraisal Date, PD Review Date, Final Performance Plan Issued Date, and Mid-Year Review Date**. Once these dates are confirmed as accurate, select the **Save** button. Next, begin the rating process by selecting the **Update Details** icon , in the row of the 1<sup>st</sup> critical element.

**GSA Manager Self-Service**

Update Appraisals: Overview

Name: **Testemployee, Andrew A**  
 Organization: **A3QSAF-3**  
 Email Address: **andrew.testemployee@gsa.gov**  
 Occupational Series: **1102.Contracting**

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments click on the Update Details icon.

Critical Element Name	Appraised Performance	Update Details
Technical Knowledge	<a href="#">[i]</a>	<a href="#">[pencil]</a>
Customer Service and Communication (Internal and external customers)	<a href="#">[i]</a>	<a href="#">[pencil]</a>
Teamwork	<a href="#">[i]</a>	<a href="#">[pencil]</a>

**Summary Rating**

Summary Rating

**Administrative Data**

\* Indicates required field

\* Appraisal Type: Annual  
 Rating Period Start Date: 01-Oct-2009  
 \* Rating Period End Date: 30-Sep-2010  
 \* Appraisal Date: 20-Oct-2010  
 Assignment Number: 19597  
 \* Performance Plan Form: Non-supervisory Associates  
 \* Main Appraiser: Testmanager, Bonnie A

PD Review Date: 01-Oct-2009  
 Final Perf Plan Issued Date: 01-Oct-2009  
 Mid-Year Review Date: 15-Apr-2010

Select a rating level, and include your comments for the employee's performance, in regard to the critical element. You may type these comments directly into the field, or copy and paste them from a Word document. Once this is complete, select the **Save and Update Next** button, to rate the next critical element.

**Important:** The **Appraiser Comments** field will accept the first 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

**GSA Manager Self-Service**

Update Critical Elements

\* Indicates required field

Critical Element: **Technical Knowledge**  
 Start Date: **01-Oct-2009**  
 Percentage: **40**

**Rate On This Critical Element**

Appraised Performance: [1-Level 1, 2-Level 2, 3-Level 3, 4-Level 4, 5-Level 5]

Appraiser Comments: [Text Area]

**Details: Specific Measure**

- [Show](#) Knowledge of acquisition policies, procedures, guidance, regulations, and laws (ie. FAR, GSAM, GSAR, etc.)
- [Show](#) Work Accuracy
- [Show](#) Project funds management

Continue the process of selecting a rating, typing in comments, and clicking the **Save and Update Next** button, until you reach the last critical element. Once you reach the last critical element, select the **Save** button, after including your rating and comments.

**GSA** GSA Manager Self-Service

Navigator Favorites Home Logout Preferences Help

Overview Review

**Update Critical Elements**

\* Indicates required field

Back Save

Critical Element **Teamwork**

Start Date **01-Oct-2009**

Percentage **30**

**Rate On This Critical Element**

Appraised Performance  Details Specific Measure

Appraiser Comments

1-Level 1  
2-Level 2  
3-Level 3  
4-Level 4  
5-Level 5

Back Save

Home Logout Preferences Help

Now that a rating has been issued for all of the critical elements, you have the opportunity to review the ratings that you have issued, as well as make any last changes to the appraisal dates. Once confirmed as accurate, select the **Continue** button.

**GSA** GSA Manager Self-Service

Navigator Favorites Home Logout Preferences Help

Overview Review

**Update Appraisals: Overview**

Return To Appraisals In Progress Save Continue

Name **Testemployee, Andrew A**

Organization **A3QSAF-3**

Email Address **andrew.testemployee@gsa.gov**

Occupational Series **1102.Contracting**

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments click on the Update Details icon.

Critical Elements		
Critical Element Name	Appraised Performance	Update Details
Technical Knowledge	3-Level 3 <input type="button" value="U"/>	<input type="button" value="P"/>
Customer Service and Communication (internal and external customers)	3-Level 3 <input type="button" value="U"/>	<input type="button" value="P"/>
Teamwork	3-Level 3 <input type="button" value="U"/>	<input type="button" value="P"/>

**Summary Rating**

Summary Rating **3-Level 3**

**Administrative Data**

\* Indicates required field

\* Appraisal Type

Rating Period Start Date **01-Oct-2009**

\* Rating Period End Date **30-Sep-2010**

\* Appraisal Date **20-Oct-2010**

Assignment Number **19597**

\* Performance Plan Form **Non-supervisory Associates**

\* Main Appraiser **Testmanager, Bonnie A**

PD Review Date

Final Perf Plan Issued Date

Mid-Year Review Date

Return To Appraisals In Progress Save Continue

Home Logout Preferences Help

The **Update Appraisals: Review** screen allows you to review the appraisal data, in a non-editable format. If you must make any revisions, select the **Back** button. Otherwise, select the **Continue** button.

**GSA Manager Self-Service**

Update Appraisals: Review

Name: **Testemployee, Andrew A** | Email Address: [andrew.testemployee@gsa.gov](mailto:andrew.testemployee@gsa.gov)  
 Organization: **A3QSAF-3** | Occupational Series: **1102.Contracting**

Please review the performance plan data. To make changes, such as changing a critical element or percentage, click the Back button. Once you have reviewed the completed performance plan, click the continue button.

**Administrative Data**

Initiator	<b>Testmanager, Bonnie A</b>	Main Appraiser	<b>Testmanager, Bonnie A</b>
Appraisal Type	<b>Annual</b>	Appraisal Date	<b>20-Oct-2010</b>
Rating Period Start Date	<b>01-Oct-2009</b>	Final Perf Plan Issued Date	<b>01-Oct-2009</b>
Rating Period End Date	<b>30-Sep-2010</b>	Mid-Year Review Date	<b>15-Apr-2010</b>
Performance Plan Form	<b>Non-supervisory Associates</b>		

**Critical Elements**

Details: Critical Element Name	Appraised Performance
<a href="#">Show</a> Technical Knowledge	3-Level 3
<a href="#">Show</a> Customer Service and Communication (internal and external customers)	3-Level 3
<a href="#">Show</a> Teamwork	3-Level 3

If you must change the main appraiser for the appraisal, select the **Change Main Appraiser** button. Otherwise, select the **Summary Ratings and Comments** button.

**GSA Manager Self-Service**

Confirmation  
Your changes have been saved.

Main Appraiser Review

Name: **Testemployee, Andrew A** | Email Address: [andrew.testemployee@gsa.gov](mailto:andrew.testemployee@gsa.gov)  
 Organization: **A3QSAF-3** | Occupational Series: **1102.Contracting**

**Administrative Data**

Initiator	<b>Testmanager, Bonnie A</b>	Appraisal Date	<b>20-Oct-2010</b>
Appraisal Type	<b>Annual</b>	FD Review Date	<b>01-Oct-2009</b>
Rating Period Start Date	<b>01-Oct-2009</b>	Final Perf Plan Issued Date	<b>01-Oct-2009</b>
Rating Period End Date	<b>30-Sep-2010</b>	Mid-Year Review Date	<b>15-Apr-2010</b>
Performance Plan Form	<b>Non-supervisory Associates</b>		
Main Appraiser	<b>Testmanager, Bonnie A</b>		

**Critical Elements**

Details: Critical Element Name	Appraised Performance
<a href="#">Show</a> Technical Knowledge	3-Level 3
<a href="#">Show</a> Customer Service and Communication (internal and external customers)	3-Level 3
<a href="#">Show</a> Teamwork	3-Level 3

The **Summary Ratings and Comments** screen allows you to include your **Summary Rating Overall Comments**, and **Development and Training Comments**. You may type these comments directly into the field, or copy and paste them from a Word document. Once completed, select the **Save and Continue** button.

**Important:** The **Summary Rating Overall Comments** and **Development and Training Comments** fields will each accept up to 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

The screenshot shows the 'GSA Manager Self-Service' interface. At the top, there is a navigation bar with 'GSA' logo, 'GSA Manager Self-Service' text, and links for 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', and 'Help'. Below this is a breadcrumb trail: 'Change Main Appraiser > Main Appraiser Review > Summary Ratings and Comments'. There are four buttons: 'Back', 'Edit Appraisal', 'Save', and 'Save and Continue'. The main content area displays employee information: Name 'Testemployee, Andrew A', Organization 'A3QSAF-3', Email Address 'andrew.testemployee@gsa.gov', and Occupational Series '1102.Contracting'. A prompt says 'Enter overall comments and development and training comments. Next, click on "SAVE AND CONTINUE".' Below this is a 'Critical Elements' section with 'Show All Details' and 'Hide All Details' links, and a table with columns 'Details' and 'Critical Element Name'. The table lists 'Technical Knowledge', 'Customer Service and Communication (internal and external customers)', and 'Teamwork'. The 'Summary Rating and Comments' section shows 'Summary Rating' as '3-Level 3' and a large text area for 'Overall Comments'. The 'Development and Training' section has a text area for 'Comments'. At the bottom, there are four buttons: 'Back', 'Edit Appraisal', 'Save', and 'Save and Continue'.

## Submitting the Appraisal

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You are now viewing the **Final Review** screen. If you have not met with the employee, do not submit the appraisal. Rather, generate a PDF of the appraisal by selecting the **Printable Form** button, which you can share with the employee. Once the meeting has taken place and you are ready to submit, return back to this screen. If your rating is a level 1 or level 5, the appraisal will require a 2<sup>nd</sup> level of approval. You may use the **Comments to Approvers** field, and the attachment functionality, to offer support for the rating to the 2<sup>nd</sup> level approver. **Note:** the comments to the approver and the attached files will not stay with the appraisal, once the appraisal is submitted in CHRIS. They are used only in the approval process, as a means to include additional support for the 2<sup>nd</sup> level approver. Once the appraisal is confirmed as accurate, select the **Submit** button.

**GSA** GSA Manager Self-Service Navigator Favorites Home Logout Preferences Help

Change Main Appraiser > Main Appraiser Review > Summary Ratings and Comments >

**Final Review**

To make changes to the appraisal click on the Back button. Summary ratings of 1 and 5 require second level approval. Verify approver routing below and make changes if necessary. If you have not met with your employee, do not submit the appraisal. Generate a PDF file of the appraisal to share with the associate by clicking on PRINTABLE FORM. Once you have printed out the form, click on RETURN TO APPRAISALS IN PROGRESS to begin evaluating another employee. If you have met with your employee and are ready to submit the appraisal, click on SUBMIT.

Return To Appraisals In Progress Back Edit Appraisal Submit Printable Form

Name **Testemployee, Andrew A** Email Address [andrew.testemployee@gsa.gov](mailto:andrew.testemployee@gsa.gov)  
 Organization **A3QSAF-3** Occupational Series **1102.Contracting**

**Critical Elements**

[Show All Details](#) | [Hide All Details](#)

Details	Critical Element Name
<a href="#">Show</a>	Technical Knowledge
<a href="#">Show</a>	Customer Service and Communication (internal and external customers)
<a href="#">Show</a>	Teamwork

**Summary Rating and Comments**

Summary Rating **3-Level 3**  
 Overall Comments **Andrew continues to be a strong contributor to the division. Great job, Andrew.**

**Development and Training**

Comments **Andrew has expressed interest in Project Management training. Together, we will evaluate several available PM programs for the upcoming fiscal year.**

**Reviewing Officials**

To remove a reviewing official from the list, click on the "Delete" icon. To add a reviewing official, click on "Add Reviewing Official" and then use the flashlight or enter a last name and hit your TAB key to search for the appropriate reviewing official.

Line No	Reviewing Official	Category	Delete
No Approvers			

**Comments to Approvers**

**Additional Information**

**Attachments**

To help approvers understand the request, you can attach supporting documents, images, or links to this action.

None

Return To Appraisals In Progress Back Edit Appraisal Submit Printable Form

Home Logout Preferences Help

The **Warning** screen appears, notifying you that a level 1 or 5 will be submitted to a 2<sup>nd</sup> level approver, and a level 2, 3, or 4 will generate an email to the employee. If you are ready to submit the appraisal, select **Yes**.

**GSA** GSA Manager Self-Service Navigator Favorites Home Logout Preferences

**Warning**

If this rating is a Level 1 or 5, submitting this appraisal will send it to the reviewing official. If it is a Level 2, 3, or 4, submitting this appraisal will complete the appraisal and will generate an email to the employee.

You cannot update a completed appraisal. Do you want to continue?

Home Logout Preferences

The confirmation message appears, confirming that the appraisal has been completed, or submitted for approval. To continue completing appraisals, look for the next appraisal under **Appraisals in Progress**. If the appraisal has not



been created, select the **Build Performance Plan** button, to be taken to **Manager Self-Service → Build Performance Plans**.

