

# CHRIS User Guide: Creating an Annual Appraisal

CHRIS Responsibility Required: Manager Self-Service or Performance Plan

## 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. This user guide offers instructions on creating the annual appraisal, from the performance plan.

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### Chapter Contents

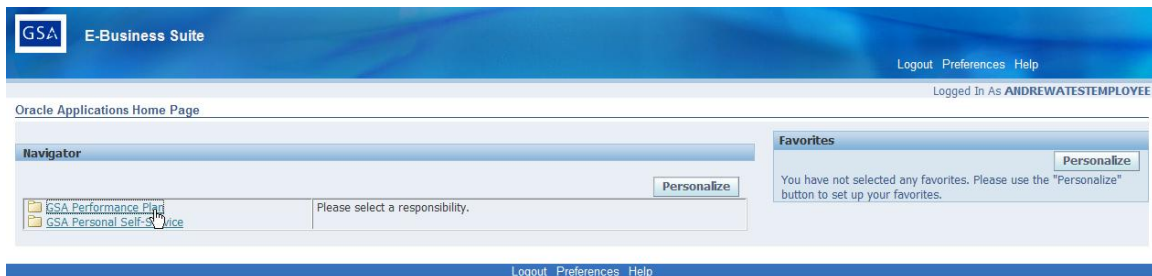
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## Entering the Performance Plan Responsibility


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.

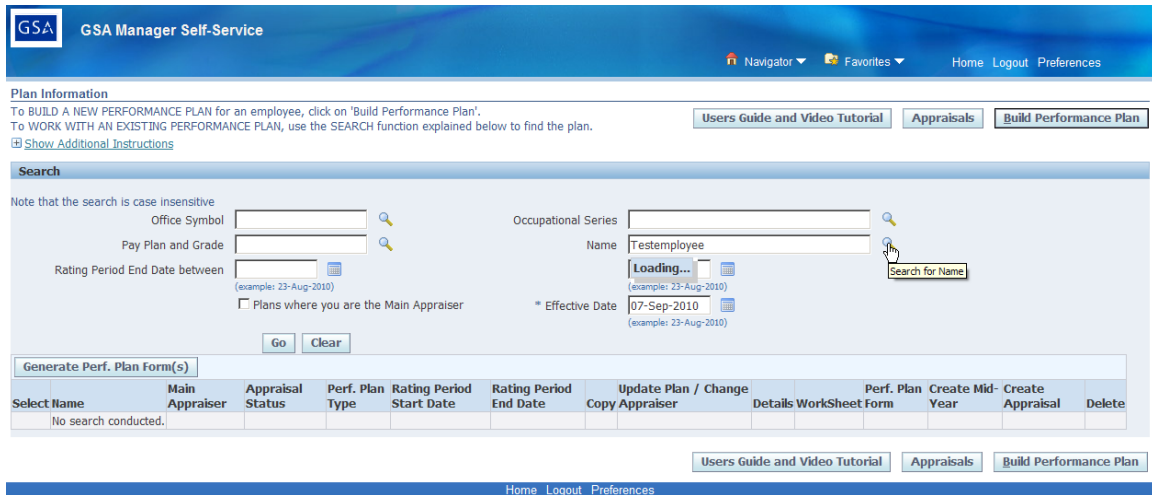


All other users select **GSA Performance Plan**.



## Querying Employees

The **Plan Information** screen appears and provides multiple options for identifying the employee. If you are listed as the employee's main appraiser, you can select the box next to **Plans where you are the main appraiser**. Otherwise, the most direct way to locate an employee is to use the **Name** field. If searching the name field, type in the employee's last name, and select the **Search** icon .





**GSA Manager Self-Service**


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


Search


Note that the search is case insensitive

Office Symbol  


Occupational Series  

Pay Plan and Grade  

Name   **Search for Name**

Rating Period End Date between    
(examples: 23-Aug-2010)

Plans where you are the Main Appraiser

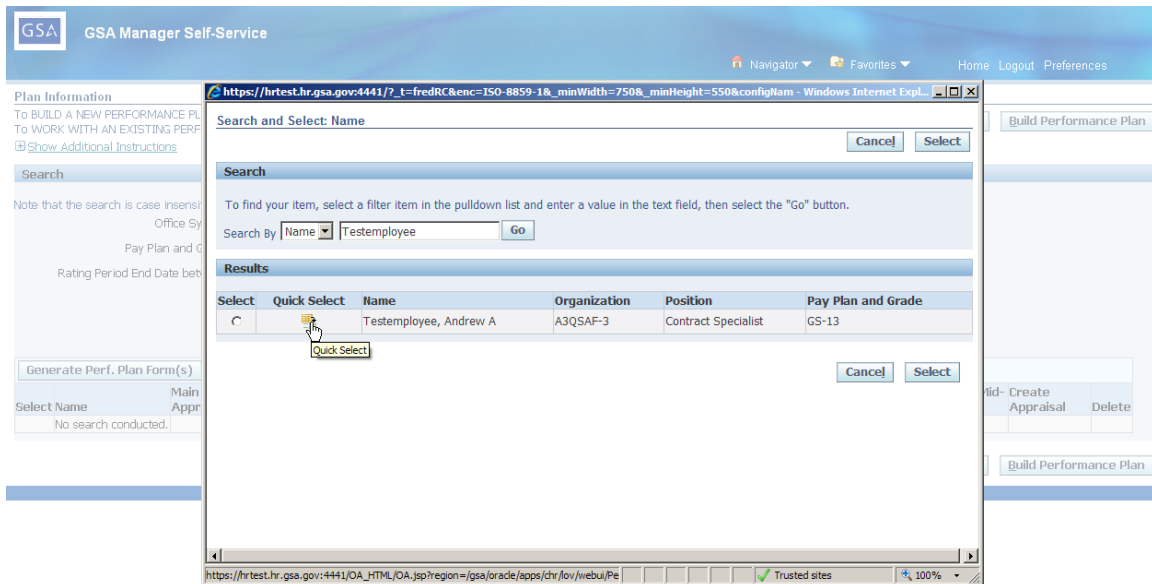
\* Effective Date    
(examples: 23-Aug-2010)

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

[Users Guide and Video Tutorial](#) [Appraisals](#) [Build Performance Plan](#)

Home Logout Preferences

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



**GSA Manager Self-Service**

Plan Information  
To BUILD A NEW PERFORMANCE PLAN for an employee, click on 'Build Performance Plan'.  
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[Show Additional Instructions](#)


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	Pay Plan and Grade
<input type="checkbox"/>		Testemployee, Andrew A	A3QSAF-3	Contract Specialist	GS-13

[Users Guide and Video Tutorial](#) [Appraisals](#) [Build Performance Plan](#)

Home Logout Preferences

Next, select the **Go** button to run the query.

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

**Search**  
 Note that the search is case insensitive

Office Symbol  Occupational Series   
 Pay Plan and Grade  Name Testemployee, Andrew A  
 Rating Period End Date between  (example: 23-Aug-2010)  
 Plans where you are the Main Appraiser \* Effective Date  (example: 07-Sep-2010)

**Go** **Clear**

Generate Perf. Plan Form(s)

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

For each employee, begin by clicking on the **Details** icon to ensure that the performance plan is current. If any changes were made since the beginning of the year that are not documented in CHRIS, close the **Details** screen and then click on the **Update Plan/Change Appraiser** icon , to make changes to the performance plan.

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

**Search**  
 Note that the search is case insensitive

Office Symbol  Occupational Series   
 Pay Plan and Grade  Name Testemployee, Andrew A  
 Rating Period End Date between  (example: 24-Aug-2010)  
 Plans where you are the Main Appraiser \* Effective Date  (example: 08-Sep-2010)


**Go** **Clear**


Generate Perf. Plan Form(s)

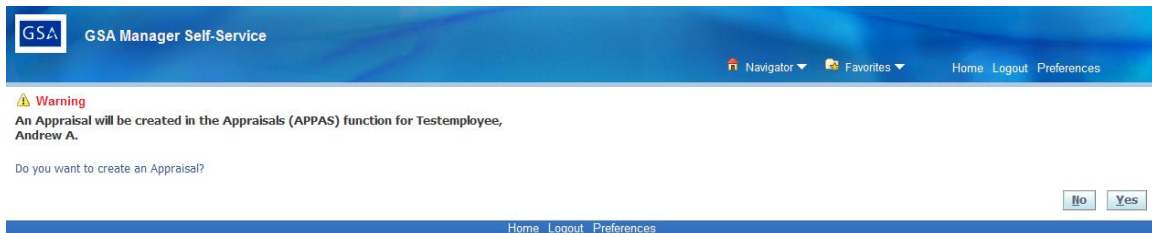
Select All | Select None

Select	Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Change Copy Appraiser	Details WorkSheet Form	Perf. Plan Year	Create Mid-Year Appraisal	Create Appraisal	Delete
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Plan in Progress	Annual	01-Oct-2010	30-Sep-2011						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Plan in Progress	Annual	01-Oct-2009	30-Sep-2010						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Completed	Annual	01-Oct-2008	30-Sep-2009						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Completed	Annual	01-Oct-2007	30-Sep-2008						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Completed	Annual	01-Oct-2006	30-Sep-2007						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Completed	Annual	21-Oct-2005	30-Sep-2006						
<input type="checkbox"/>	Testemployee, Andrew A	Testmanager, Bonnie A	Completed	Annual	15-Jun-2005	20-Oct-2005						

## Creating the Annual Appraisal

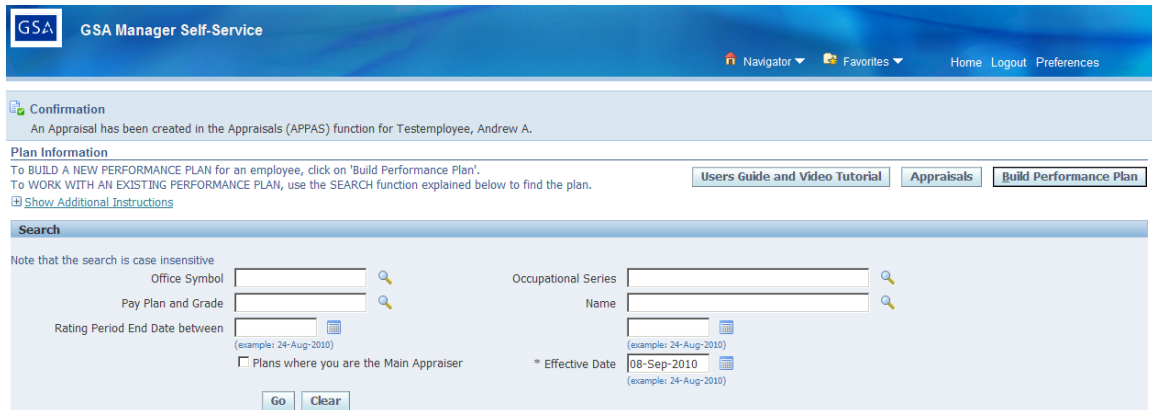
Once you have determined that the performance plan is accurate, create the Annual Appraisal record by clicking on the **Create Appraisal** icon . If the icon is not in color, then the appraisal has already been created, and can be located in the main appraiser's **Appraisals** section, of **Manager Self-Service**.

After you click on the **Create Appraisal** icon , you will receive a warning message. Click the **Yes** button, to confirm creation of the annual appraisal.



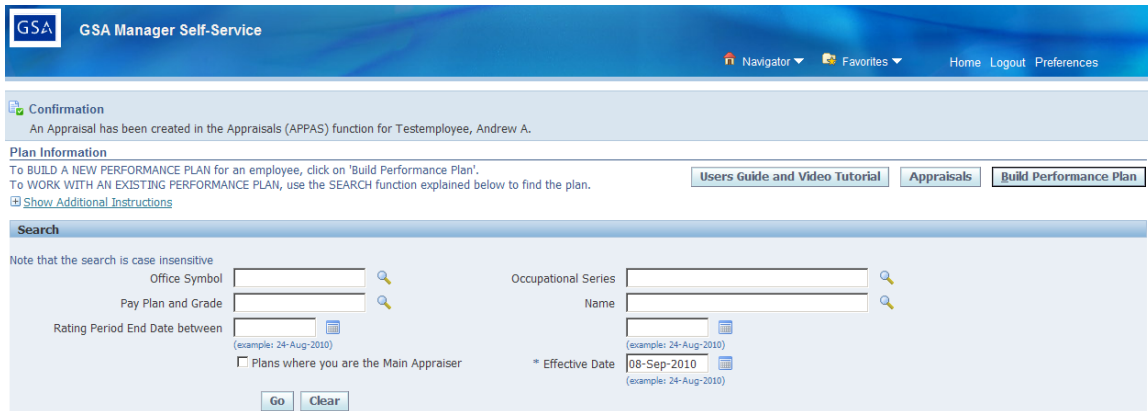
The screenshot shows the GSA Manager Self-Service interface. At the top, there is a blue header with the GSA logo and the text "GSA Manager Self-Service". On the right side of the header, there are navigation links: "Navigator", "Favorites", "Home", "Logout", and "Preferences". Below the header, a warning message is displayed: "Warning: An Appraisal will be created in the Appraisals (APPAS) function for Testemployee, Andrew A." Below the warning, a question is asked: "Do you want to create an Appraisal?". At the bottom right of the warning area, there are two buttons: "No" and "Yes".

After clicking on the **Yes** button, the system will return you to the **Build Performance Plan screen** and you will see a confirmation message that the Annual Appraisal has been created.



The screenshot shows the GSA Manager Self-Service interface. At the top, there is a blue header with the GSA logo and the text "GSA Manager Self-Service". On the right side of the header, there are navigation links: "Navigator", "Favorites", "Home", "Logout", and "Preferences". Below the header, a confirmation message is displayed: "Confirmation: An Appraisal has been created in the Appraisals (APPAS) function for Testemployee, Andrew A." Below the confirmation message, there is a section titled "Plan Information" with the following text: "To BUILD A NEW PERFORMANCE PLAN for an employee, click on 'Build Performance Plan'. To WORK WITH AN EXISTING PERFORMANCE PLAN, use the SEARCH function explained below to find the plan." Below the text, there are three buttons: "Users Guide and Video Tutorial", "Appraisals", and "Build Performance Plan". Below the buttons, there is a section titled "Search" with the following text: "Note that the search is case insensitive". Below the text, there are several input fields: "Office Symbol", "Pay Plan and Grade", "Rating Period End Date between" (with a date picker showing "24-Aug-2010"), "Occupational Series", "Name", and "\* Effective Date" (with a date picker showing "08-Sep-2010"). There is also a checkbox labeled "Plans where you are the Main Appraiser". At the bottom of the search section, there are two buttons: "Go" and "Clear".

When you have finished creating annual appraisals for all of your employees, click on the **Appraisals** button, in the upper right hand corner of your screen. This will take you to **Manager Self-Service → Appraisals**.



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

**Confirmation**  
An Appraisal has been created in the Appraisals (APPAS) function for Testemployee, Andrew A.

**Plan Information**  
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[Show Additional Instructions](#)

[Users Guide and Video Tutorial](#) [Appraisals](#) [Build Performance Plan](#)

**Search**

Note that the search is case insensitive

Office Symbol

Occupational Series

Pay Plan and Grade

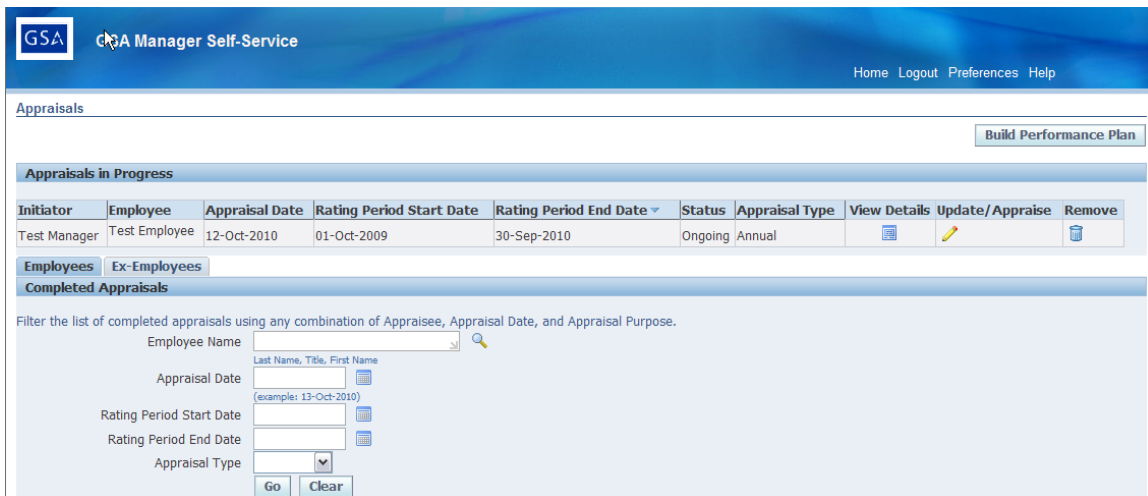
Name

Rating Period End Date between    
(example: 24-Aug-2010)

Plans where you are the Main Appraiser

\* Effective Date    
(example: 08-Sep-2010)  
(example: 24-Aug-2010)

Now in **Manager Self-Service → Appraisals**, you can begin the appraisal. For instructions on this process, please refer to the user guide, **Completing an Annual Appraisal**.



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

**Appraisals** [Build Performance Plan](#)

**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	<input type="button" value="View Details"/>	<input type="button" value="Update/Appraise"/>	<input type="button" value="Remove"/>

**Employees** **Ex-Employees**

**Completed Appraisals**

Filter the list of completed appraisals using any combination of Appraiser, 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