CHRIS User Guide: Copying a Performance Plan

CHRIS Responsibility Required: Manager Self-Service or Performance Plan

Module Overview

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. From the Plan Information screen the user can copy performance plans from one year to the next and from one employee to another. Once they have copied the plan the user can alter the plans accordingly.

Chapter Contents

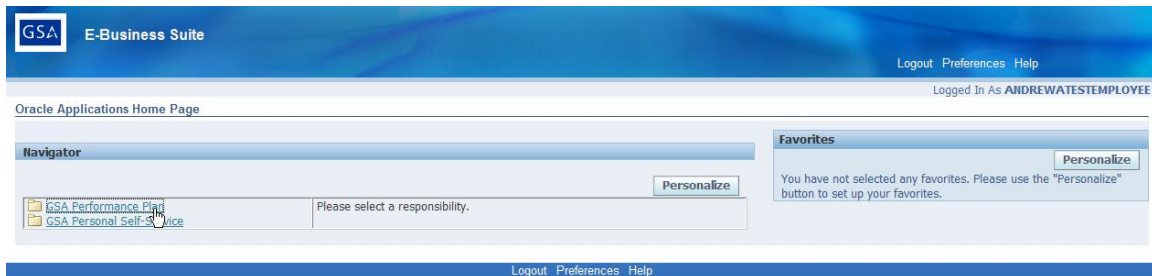## Entering the Performance Plan Responsibility

If you are a manager, select **GSA Manager Self-Service**, then select the **Build Performance Plan (APPAS)** menu option.


For non-supervisory employees that assist with performance plans, select **GSA Performance Plan.**
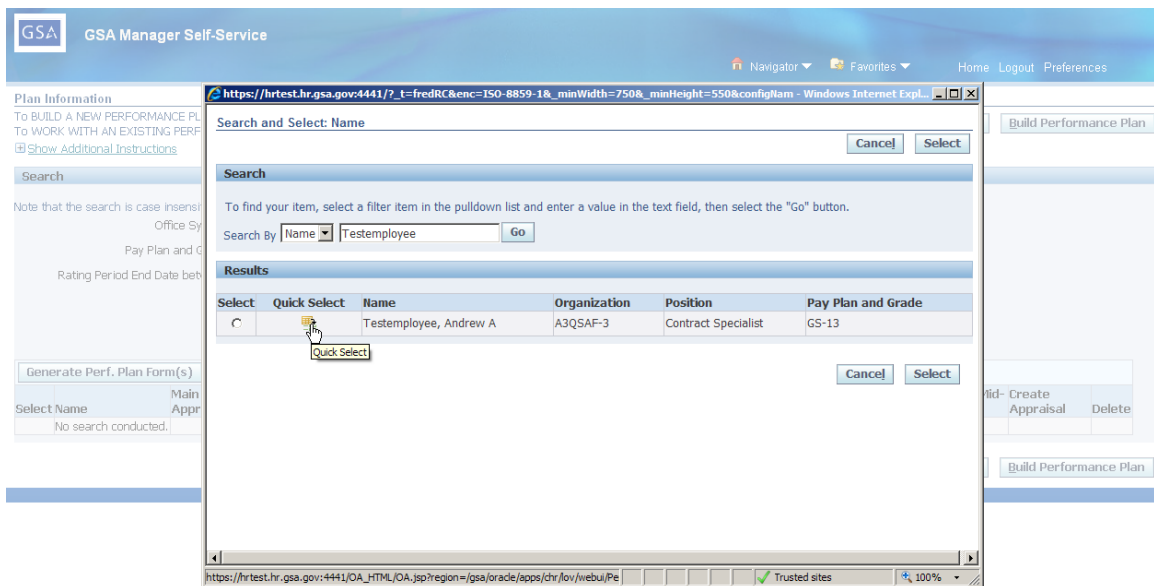
Querying the Employee and Performance Plan

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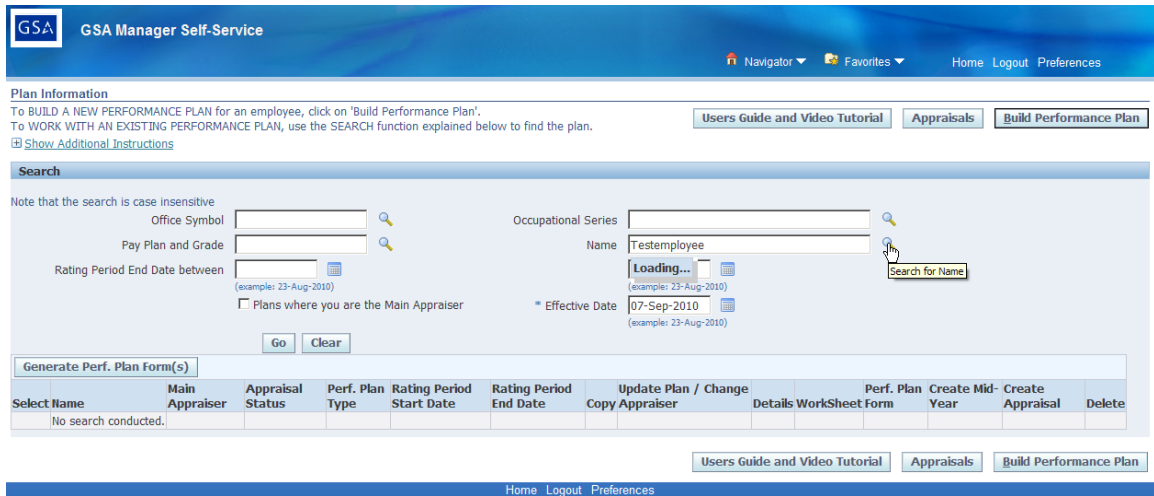
This will take you to the **Search and Select: Name** screen. Identify the correct employee and click on the **Quick Select** icon 📑 .

Next, select the **Go** button to run the query.
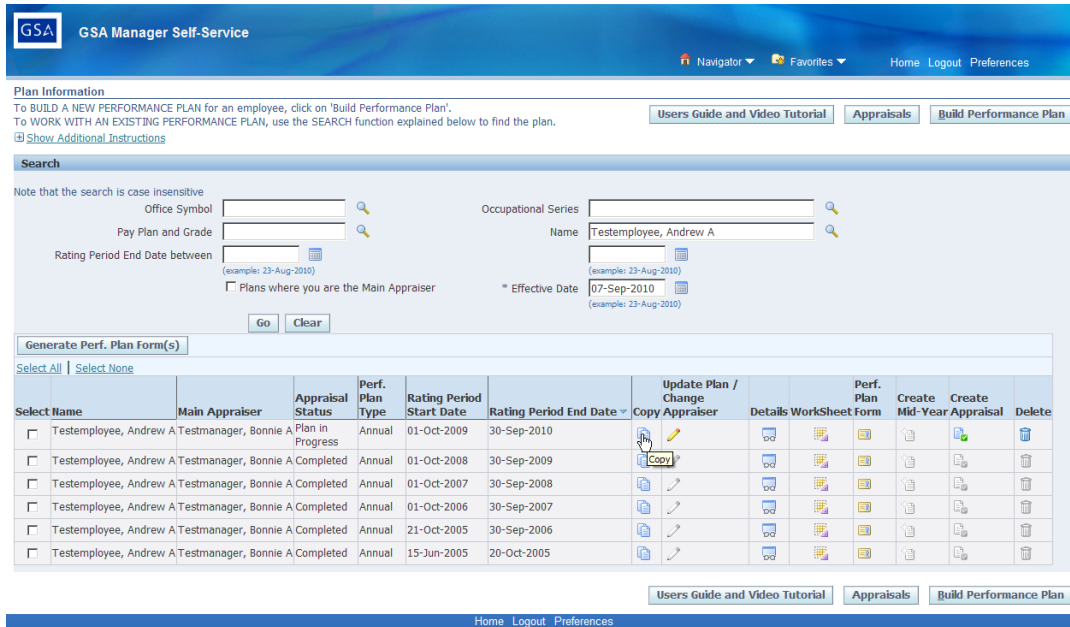
Copying the Performance Plan

Before copying the plan, you can confirm the performance plan's information by selecting the **Details** icon 🔍. This will bring up the plan information. Once confirmed, select the **Copy** icon 📋.

You are now viewing the **Copy Performance Plan** screen. Type in the last name of the employee that will be placed on the copied performance plan, then select the **Search** icon 🔍.

Once the employee's name is selected, the **Main Appraiser** field will auto-populate with the employee's current Supervisor of Record. If the main appraiser is going to be a different manager than the one listed, then remove the auto-populated name and search for the correct main appraiser. Also, make sure that the rating period start and end dates are accurate. In this example, we have changed these dates to reflect the upcoming fiscal year. Once this is accomplished, select the **Save** button.

If any changes must be made to the performance plan's critical elements, select the **Critical Element** button. If the plan is accurate, select the **Back** button.

To confirm that the performance plan has been successfully copied over, you can search for the employee, then select the **Go** button to run the query.

As confirmation, you will see the plan that you have just created.