

# **CHRIS User Guide: Copying a Performance Plan**

**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. 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.

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## **Chapter Contents**

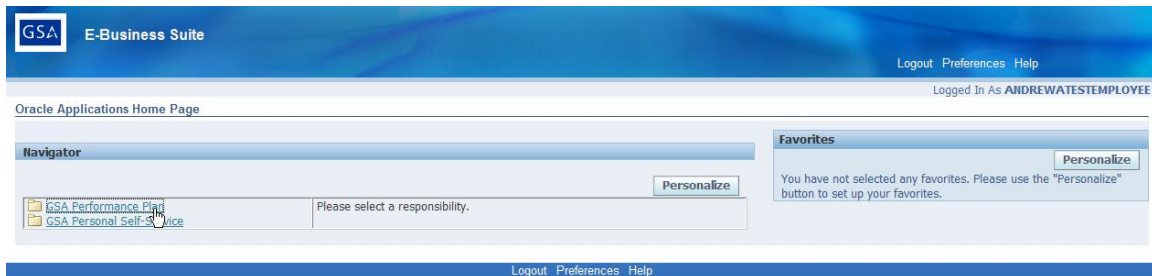
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## Entering the Performance Plan Responsibility


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

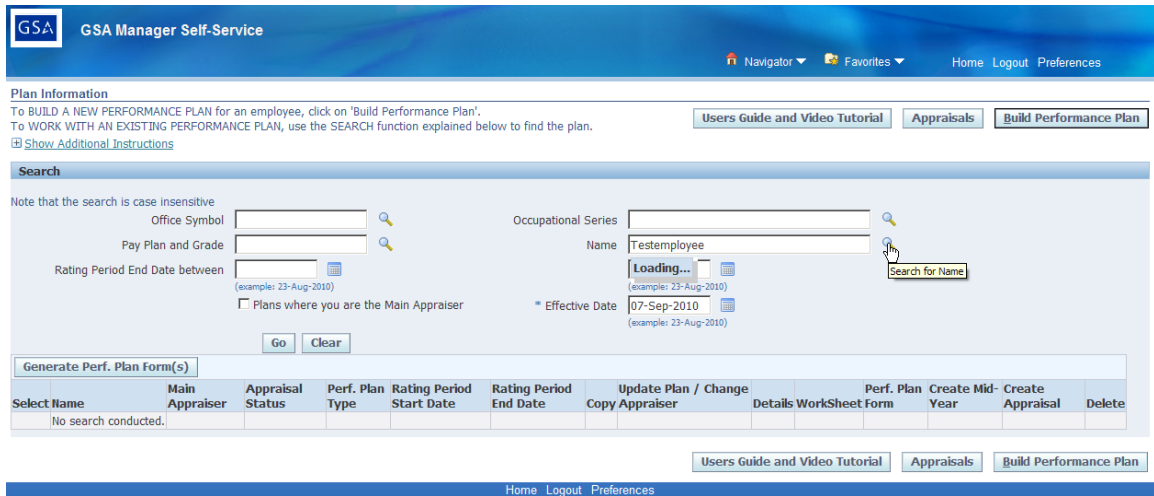


For non-supervisory employees that assist with performance plans, select **GSA Performance Plan**.

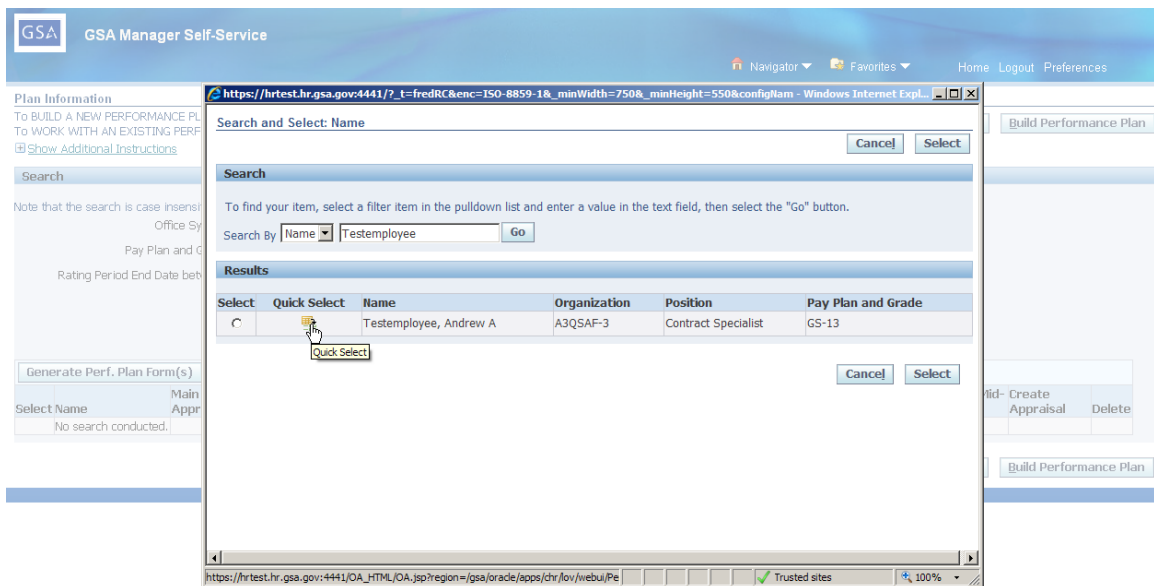


# Querying the Employee and Performance Plan

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.

**GSA Manager Self-Service**

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**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](#)

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**Search**

Note that the search is case insensitive

Office Symbol

Pay Plan and Grade

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

Plans where you are the Main Appraiser

Occupational Series

Name    
(example: 23-Aug-2010)

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

**Go** Clear



Generate Perf. Plan Form(s)

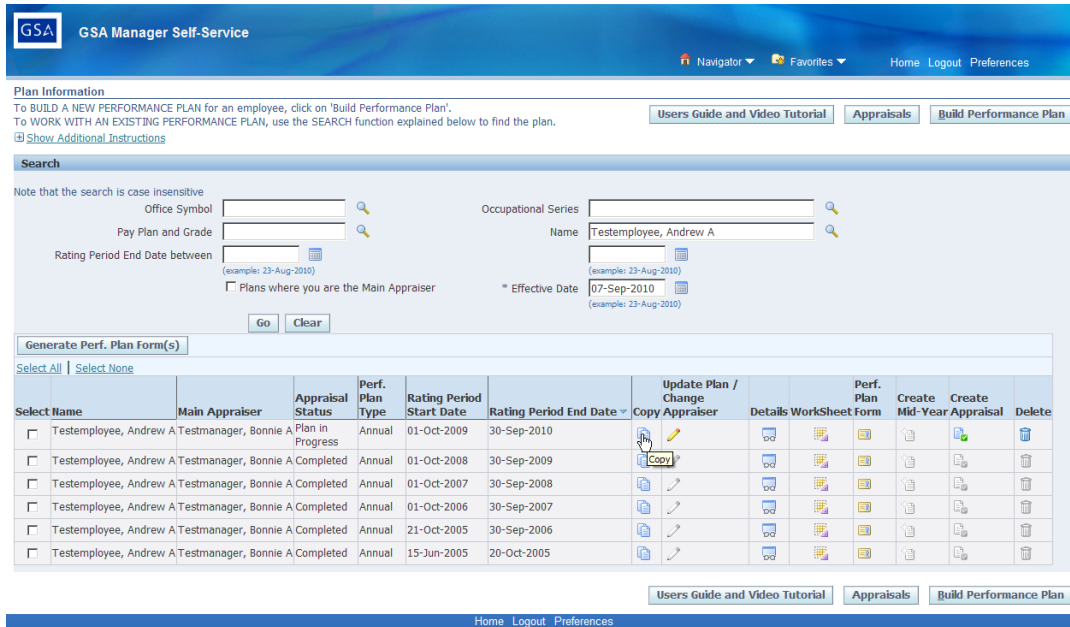
Select	Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Change Copy Appraiser	Details WorkSheet Form	Perf. Plan Create Mid-Year	Create Appraisal	Delete
No search conducted.											

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# 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 .



**Plan Information**  
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**Search**

Note that the search is case insensitive


Office Symbol  Occupational Series

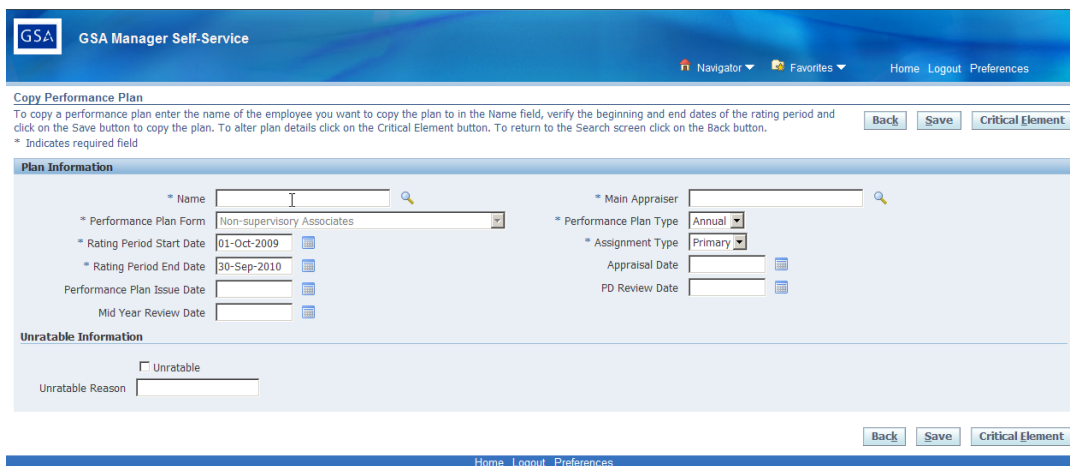
Pay Plan and Grade  Name

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

Plans where you are the Main Appraiser \* Effective Date   
(example: 23-Aug-2010)

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	Create Mid-Year	Create Appraisal	Delete
<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								

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 .



**Copy Performance Plan**

To copy a performance plan enter the name of the employee you want to copy the plan to in the Name field, verify the beginning and end dates of the rating period and click on the Save button to copy the plan. To alter plan details click on the Critical Element button. To return to the Search screen click on the Back button.

\* Indicates required field

**Plan Information**

\* Name

\* Main Appraiser

\* Performance Plan Form

\* Performance Plan Type

\* Rating Period Start Date

\* Assignment Type

\* Rating Period End Date

Appraisal Date

Performance Plan Issue Date

FD Review Date

Mid Year Review Date

**Unratable Information**

Unratable

Unratable Reason

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.

**GSA Manager Self-Service**

Copy Performance Plan

To copy a performance plan enter the name of the employee you want to copy the plan to in the Name field, verify the beginning and end dates of the rating period and click on the Save button to copy the plan. To alter plan details click on the Critical Element button. To return to the Search screen click on the Back button.

\* Indicates required field

**Plan Information**

\* Name: Testemployee, Andrew A

\* Main Appraiser: Testmanager, Bonnie A

\* Performance Plan Form: Non-supervisory Associates

\* Performance Plan Type: Annual

\* Rating Period Start Date: 01-Oct-2010

\* Assignment Type: Primary

\* Rating Period End Date: 30-Sep-2011

Appraisal Date: [ ]

Performance Plan Issue Date: [ ]

PD Review Date: [ ]

Mid Year Review Date: [ ]

**Unratable Information**

Unratable

Unratable Reason: [ ]

Buttons: Back, Save, Critical Element

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.

**GSA Manager Self-Service**

Update Performance Plan

To update a performance plan, fill in all of the required fields (indicated by a blue asterisk) and all dates for actions and/or meetings that have already occurred. To update or add critical elements click on the CRITICAL ELEMENTS button.

If at any point an associate becomes Unratable, check the Unratable box and enter the Unratable Reason.

\* Indicates required field

**Plan Information**

\* Name: Testemployee, Andrew A

\* Main Appraiser: Testmanager, Bonnie A

\* Performance Plan Form: Non-supervisory Associates

\* Performance Plan Type: Annual

\* Rating Period Start Date: 01-Oct-2010

\* Assignment Type: Primary

\* Rating Period End Date: 30-Sep-2011

Appraisal Date: [ ]

Performance Plan Issue Date: [ ]

PD Review Date: [ ]

Mid Year Review Date: [ ]

**Unratable Information**

Unratable

Unratable Reason: [ ]

Buttons: Back, Save, Critical Element

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.

**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   
 Rating Period End Date between  \* Effective Date   
(example: 23-Aug-2010)  
 Plans where you are the Main Appraiser

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	Delete
No search conducted.												

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

**GSA Manager Self-Service**

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Search

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

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	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						

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