

# **CHRIS User Guide: Searching for an Existing Plan**

CHRIS Responsibility Required: GSA Manager Self-Service or GSA Performance Plan

## **Module Overview**

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### **Purpose**

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. From the Main Plan Information screen the users is provided with multiple options to search for performance plans. Users have the ability to search across the agency for any performance plans that have been built in the CHRIS APPAS module. This guide provides the user instructions on how retrieve and view performance plans that currently exist in CHRIS.

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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.

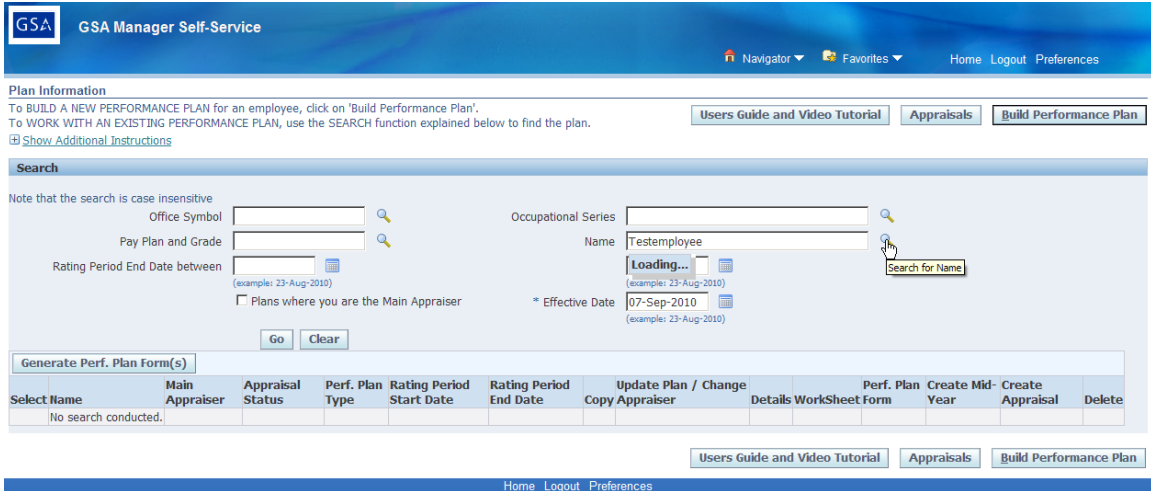



For non-supervisory employees that assist with performance plans, select **GSA Performance Plan**.

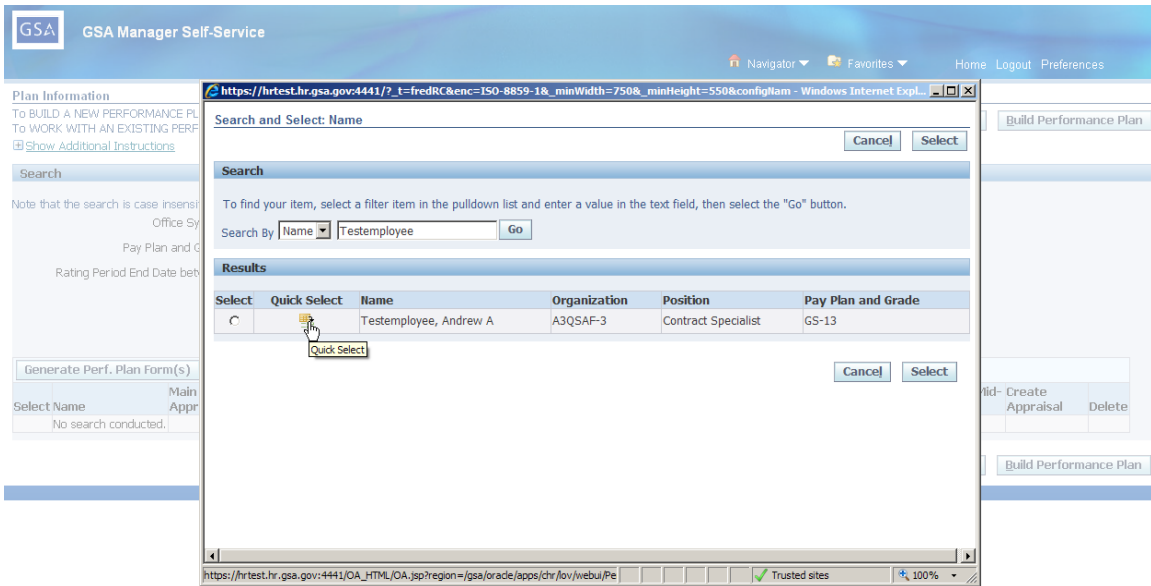


# Querying the Employee and Performance Plan

The user needs to identify which plan that they want to copy. 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 . This will populate the **Name** field on the **Plan Information** screen.



Next, select the **Go** button.

**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](#)

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 Testemployee, Andrew A

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

Plans where you are the Main Appraiser

\* 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 Year	Create Mid-Year	Create Appraisal	Delete
No search conducted.											

Users Guide and Video Tutorial | Appraisals | Build Performance Plan

Home Logout Preferences

If you are not searching for a specific employee, but rather for a specific position and grade in an organization, you can use the search functions of **Office Symbol, Pay Plan and Grade, Rating Period End Date between, and Occupational Series.**

To bring up the list of values for any of these fields, leave the field blank, and select the **Search** icon

**GSA Manager Self-Service**

Plan Information  
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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: 15-Sep-2010)

Plans where you are the Main Appraiser

\* Effective Date    
 (example: 15-Sep-2010)

**Go** **Clear**

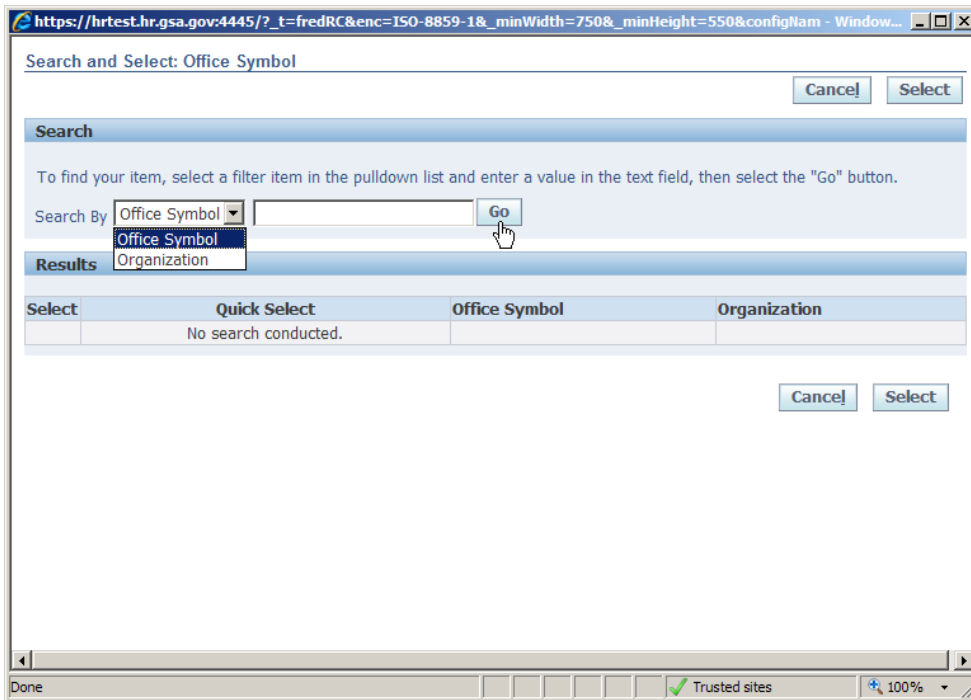
Generate Perf. Plan Form(s)

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	Create Appraisal	Delete
No search conducted.											

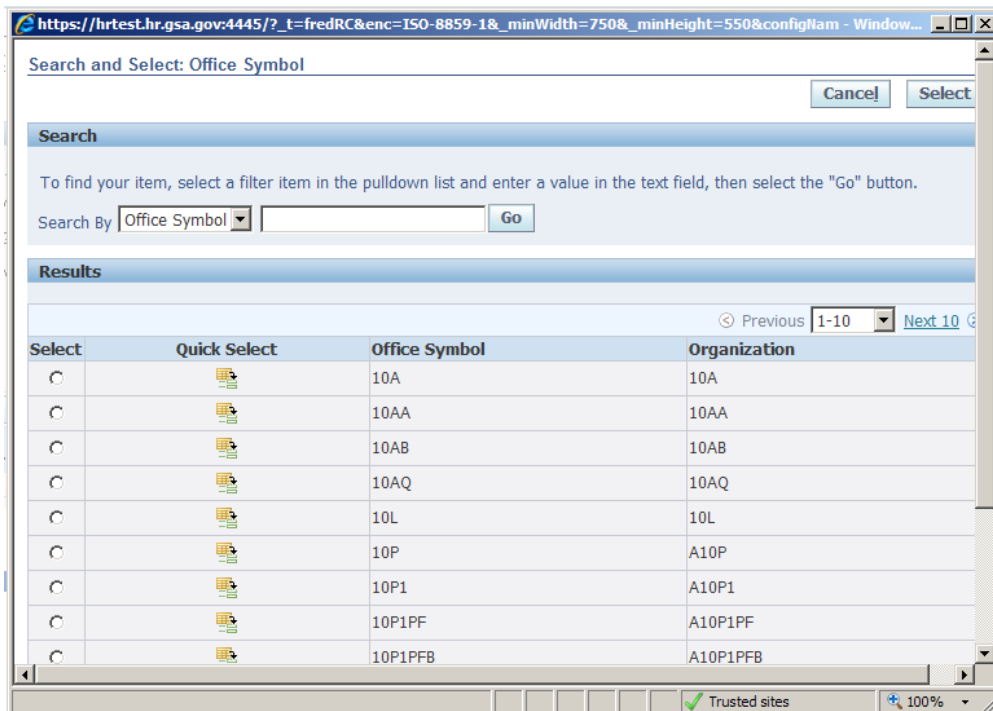
Users Guide and Video Tutorial | Appraisals | Build Performance Plan


Home Logout Preferences

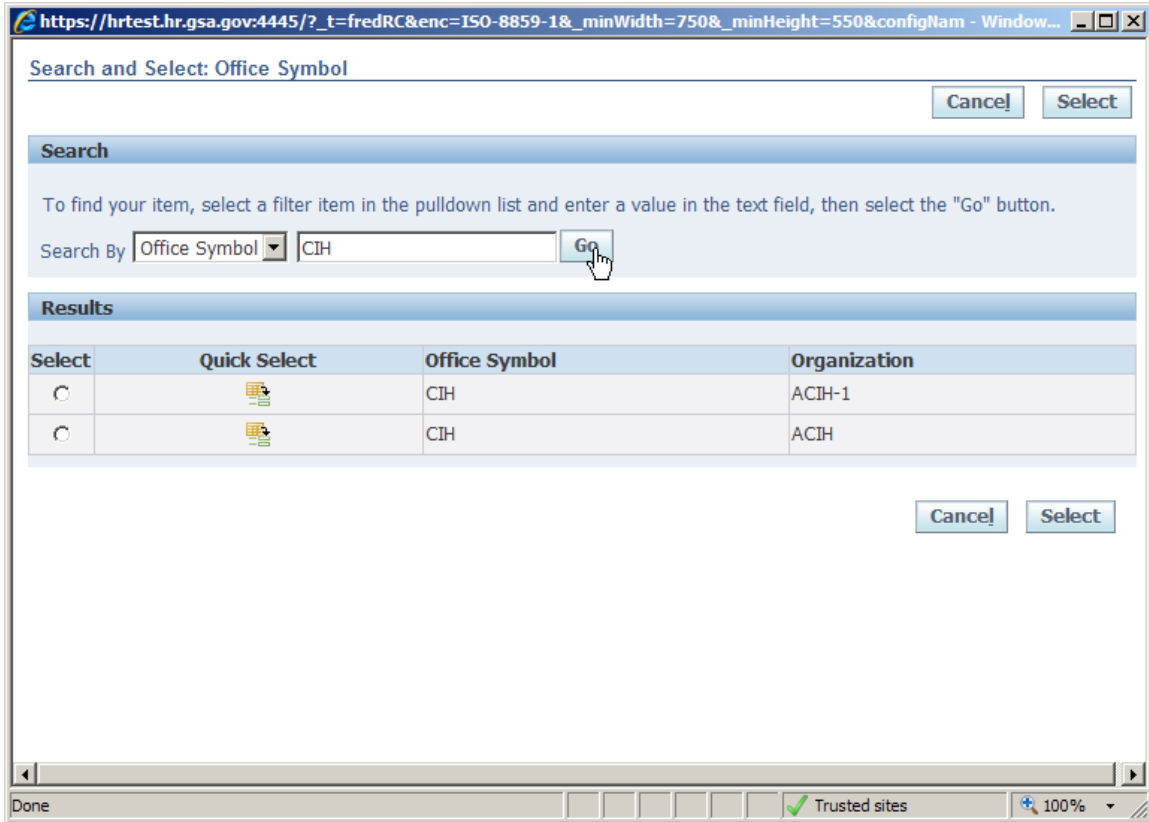
Notice that in the Office Symbol search, you can search by Office Symbol or Organization. If you want to pull the entire list of values, leave this field blank and select the **Go** button.



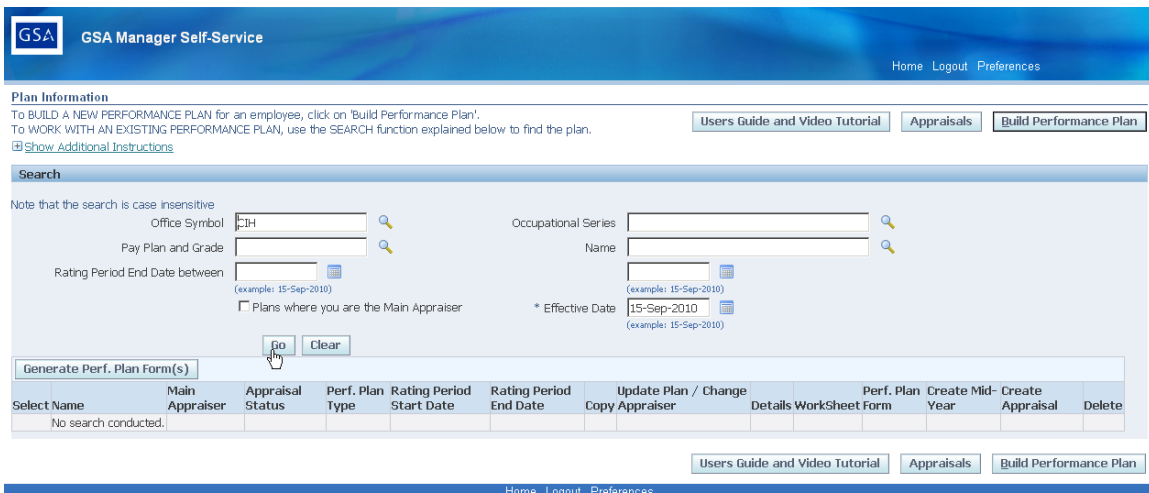
The entire list of values will appear. Select **Next**, to search through the list of values, or refine your search by typing a value into the field.



If you would like to search directly for an office symbol, type the office symbol into the search field, and select the **Go** button. Once you have identified the office symbol that you are searching for, select the **Quick Select** icon .





Select the **Go** button, to run your query, and then all matches will appear. Follow this same process when running searches for **Pay Plan and Grade** and **Occupational Series**.





## Understanding the Performance Plan Icons


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
For each performance plan there are multiple icons. An explanation of these icons is as follows:


Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Change Appraiser	Details	Worksheet Form	Perf. Plan Form	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							


Click on the **Copy** Icon  to copy the selected plan to another employee.


Click on the **Update Plan/ Change Appraiser** icon  to change the main appraiser for the performance plan, and also the dates associated with the performance plan.


Click on the **Details** Icon  to view specific performance plan details.

Click on the **Worksheet** icon  to view a PDF version of the GSA Worksheet populated with the selected performance plan's details.

Click on the **Performance Plan Form** icon  to view a PDF version of the GSA Performance plan form populated with selected performance plan's details.

Click on **Create Mid-Year** icon  to create a mid-year appraisal from the performance plan. Once a mid-year is created, it will appear under the heading of Appraisals in Progress, in Manager Self-Service → Appraisals..

Click on **Create Appraisal** icon  to begin an appraisal in the Appraisals (APPAS) module. This is further explained in another chapter.

Click on the **Delete** icon  to permanently delete a performance plan. Caution: Once a performance plan has been deleted, you can no longer retrieve the plan data.