

## **CHRIS Self Service**

### **Copying a Performance Plan**

#### **Introduction**

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 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.

#### **Guide Contents**

This guide provides instruction on how to copy an existing performance plan from one year to the next or from one employee to another.

## How to Copy a Performance Plan

### Step 1

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 Build Performance Plan and click on Build Performance Plan (APPAS) in the right hand column.

#### Navigator

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<ul style="list-style-type: none"><li><a href="#">GSA HR Professional Self-Service</a></li><li><a href="#">GSA Manager Performance Plan</a></li><li><a href="#">GSA Manager Self-Service</a></li><li><a href="#">GSA Personal Self-Service</a></li></ul>	<p><b>GSA Manager Self-Service</b></p> <ul style="list-style-type: none"><li><a href="#">Manager View</a></li><li><a href="#">Build Performance Plan (APPAS)</a></li><li><a href="#">Appraisals (APPAS)</a></li><li><a href="#">Awards</a></li><li><a href="#">Change Password and Accessibility</a></li><li><a href="#">Inbox</a></li></ul> <p><b>Help</b></p> <ul style="list-style-type: none"><li><a href="#">Build Performance Plan User Guide</a></li><li><a href="#">Appraisal (APPAS) User Guide</a></li><li><a href="#">Award (APRS) User Guide</a></li></ul>
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**Important:** The Internet Explorer or Netscape Back  button **SHOULD NOT** be used in this system to navigate between pages. Using the button will cause the system to not function properly.

### Step 2

The user needs to identify which plan that they want to copy. The Plan Information screen appears and provides two options for searching for an employee's existing performance plan by name.

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#### Plan Information

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

**WORKING WITH EXISTING PLANS:**

- To search for a specific Performance Plan, first select the employee's name by using the flashlight OR by entering the employee's last name, first name in the space provided and clicking on the GO button.
- To narrow your results to a specific date range, enter a date range and click GO.
- To view all performance plans for which you are the MAIN APPRAISER, leave all fields blank, check the box next to "Plans where you are the Main Appraiser" and click GO.
- OPTIONS AVAILABLE FOR THE RECORDS SELECTED
- To make changes to an existing plan click on the UPDATE PLAN/CHANGE APPRAISER icon.
- To copy an existing plan, select the COPY icon and follow the instructions.
- To view detailed information about a plan, select the DETAILS icon.
- To view or print the worksheet or form, click on the appropriate icon.
- To write comments and/or issue critical element ratings for the mid-year progress review, click on the CREATE MID-YEAR icon and then go to APPRAISALS (APPAS).
- To evaluate performance at the end of the rating period, click on the CREATE APPRAISALS icon and then go to APPRAISALS (APPAS).
- To delete the selected plan, use the DELETE icon.

**Search**

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name

Rating Period End Date between

Plans where you are the Main Appraiser

\* Effective Date

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

[Build Performance Plan](#)

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You can enter the employee's last name in the Name field and hit the tab key or click on the Flashlight icon  .

### Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name  

Rating Period End Date between    
(example: 25-Jun-2006)

  
(example: 25-Jun-2006)

Plans where you are the Main Appraiser

\* Effective Date    
(example: 25-Jun-2006)

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

**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	Grade
<input type="radio"/>		Wright,	4FB-1	Property Disposal Specialist	GS-12
<input type="radio"/>		Wright,	CX	Human Resources Specialist	GS-13
<input type="radio"/>		Wright,	3FL-B	Materials Handler	WG-06
<input type="radio"/>		Wright,	4PM-FT	Building Management Specialist	GS-11
<input type="radio"/>		Wright,	3PPDG	Realty Services Manager	GS-13
<input type="radio"/>		Wright,	FBPS	Property Marketing Specialist	GS-13
<input type="radio"/>		Wright,	9PFB	Building Manager	GS-14
<input type="radio"/>		Wright,	7FF-04	Transportation Opns Offcr(Motor)	GS-13
<input type="radio"/>		Wright,	3PA	Management Assistant (OA)	GS-06
<input type="radio"/>		Wright,	10PZ1	Realty Assistant	GS-08

To narrow your results to a specific date range, enter a starting and ending value in the Rating Period End Date fields. Click on the Go button  .

Rating Period End Date between    
 (example: 25-Jun-2006)  
   
 (example: 25-Jun-2006)

To limit your search to performance plans where you are the main appraiser, click on the “Plans where you are Main Appraiser” box and click on the Go button  .

### Plans where you are the Main Appraiser

Based upon the criteria that you have entered the Plan Information screen will populate with Performance Plans.

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
Stuppard,	June	Planned	Annual	01-Oct-2006	30-Sep-2007	 						
Gelber, M	June	Pending Approval	Annual	01-Oct-2005	30-Sep-2006	 						
Paige, Br	June	Plan in Progress	Annual	01-Oct-2005	30-Sep-2006	 						
Paige, Mr	June	Plan in Progress	Annual	01-Oct-2005	30-Sep-2006	 						
Payne, Si	June	Pending Approval	Annual	01-Oct-2005	30-Sep-2006	 						
Stephens	June	Plan in Progress	Annual	01-Oct-2005	30-Sep-2006	 						
Wells, C \	June	Plan in Progress	Annual	01-Oct-2005	30-Sep-2006	 						

### Step 3

Before you copy a plan verify the Rating Period Start and End Dates. For further



verification that you are copying the correct plan click on the Details icon and review the plan information. When you have finished reviewing the plan, click on the Back button to return to the Main Plan Information screen.

Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
Wright,	Brantl	Saved	Annual	01-Oct-2005	30-Sep-2006	 						
Wright,	Clark,	Completed	Annual	01-Oct-2004	30-Sep-2005	 						

## Step 4



When you are ready, click on the Copy Icon to copy the selected plan over to the next year or from one employee to another.

## Step 5

This will take you to the Copy Performance Plan screen. The Critical Element Data, the Element Measure Data and Rating Level Data will carry over from the initial plan; the user will need to enter the information on the Plan Information screen below.

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### 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	<input type="text"/>		* Main Appraiser	<input type="text"/>	
* Performance Plan Form	Non-supervisory Associates		* Performance Plan Type	Annual	
* Rating Period Start Date	01-Oct-2005		* Assignment Type	Primary	
* Rating Period End Date	30-Sep-2006		Appraisal Date	<input type="text"/>	
Performance Plan Issue Date	<input type="text"/>		PD Review Date	<input type="text"/>	
Mid Year Review Date	<input type="text"/>				

**Unratable Information**

Unratable

Unratable Reason

[Back](#) [Save](#) [Critical Element](#)

Enter the new employee's last name in the Name field and hit the tab key or click on the Flashlight icon .

## Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Name

Rating Period End Date between

(example: 25-Jun-2006)

(example: 25-Jun-2006)

Plans where you are the Main Appraiser

\* Effective Date

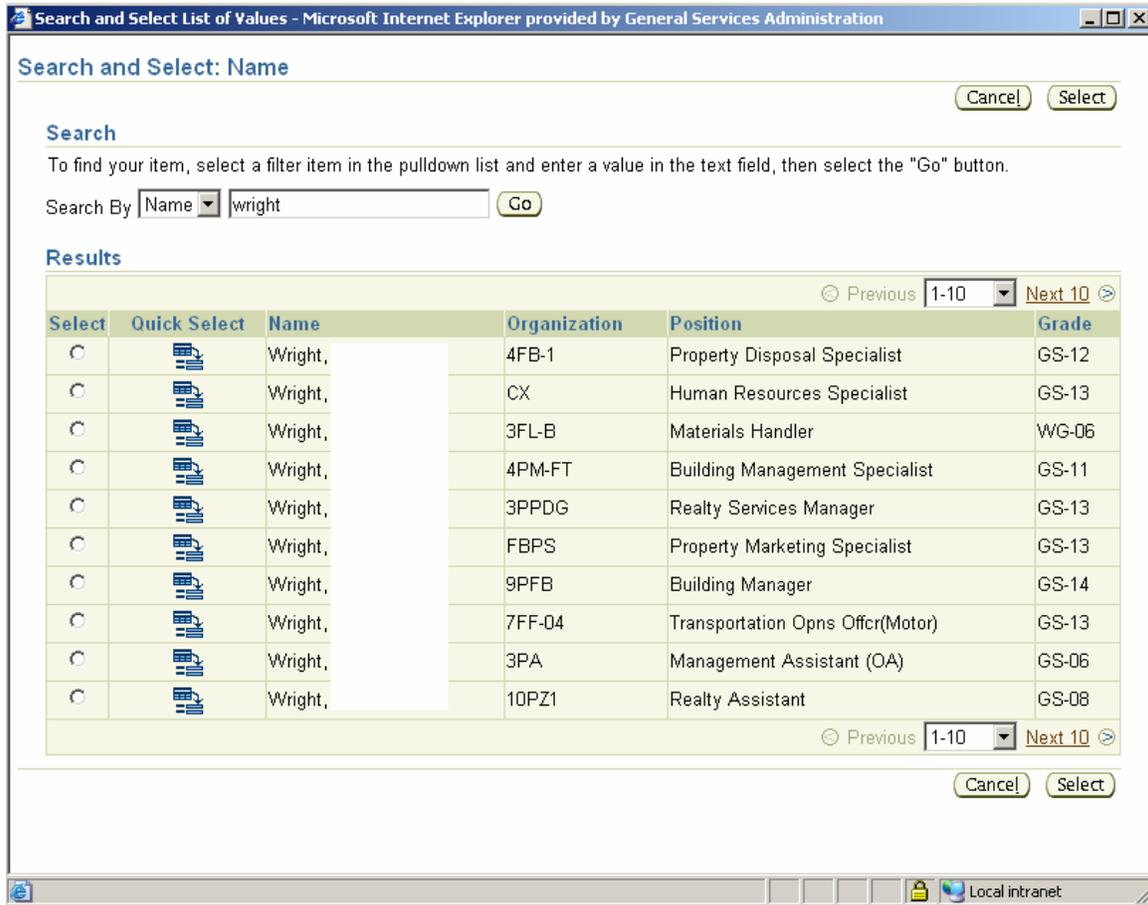
(example: 25-Jun-2006)

[Go](#) [Clear](#)

This will take you to the Search and Select: Name screen. Identify the correct employee

**Quick Select**

and click on the Quick Select  icon. This will populate the Name field on the Plan Information screen.



**Search and Select: Name**

Cancel Select

**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 Name wright Go

**Results**

Previous 1-10 Next 10

Select	Quick Select	Name	Organization	Position	Grade
<input type="radio"/>		Wright,	4FB-1	Property Disposal Specialist	GS-12
<input type="radio"/>		Wright,	CX	Human Resources Specialist	GS-13
<input type="radio"/>		Wright,	3FL-B	Materials Handler	WG-06
<input type="radio"/>		Wright,	4PM-FT	Building Management Specialist	GS-11
<input type="radio"/>		Wright,	3PPDG	Realty Services Manager	GS-13
<input type="radio"/>		Wright,	FBPS	Property Marketing Specialist	GS-13
<input type="radio"/>		Wright,	9PFB	Building Manager	GS-14
<input type="radio"/>		Wright,	7FF-04	Transportation Opns Offcr(Motor)	GS-13
<input type="radio"/>		Wright,	3PA	Management Assistant (OA)	GS-06
<input type="radio"/>		Wright,	10PZ1	Realty Assistant	GS-08

Previous 1-10 Next 10

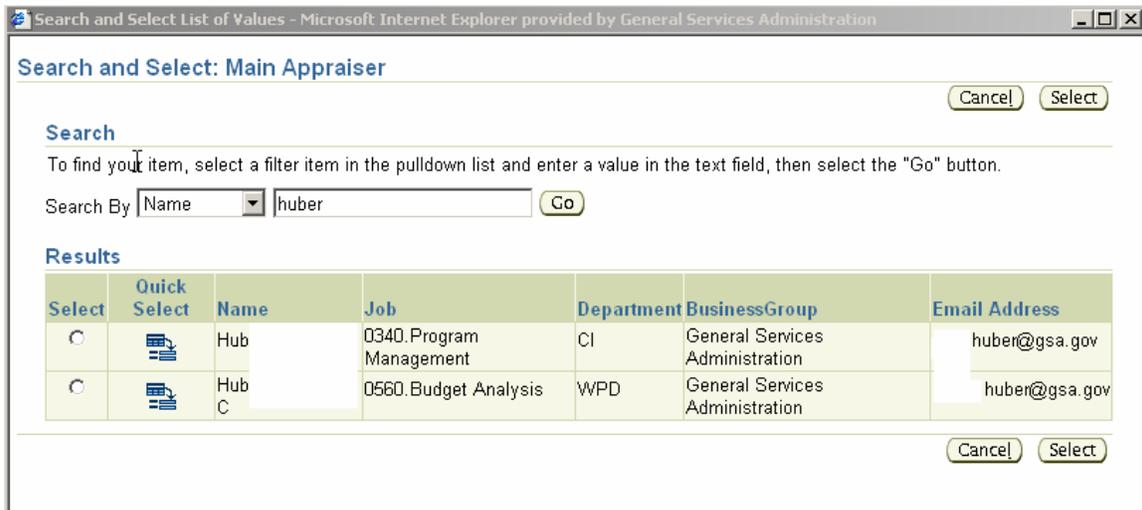
Cancel Select

## Step 6

The Main Appraiser field will auto-populate but is an editable field. The Main Appraiser field can be changed to any authorized supervisor in GSA.

\* Main Appraiser  

To change the Main Appraiser, enter the appraiser's last name in the Name field and hit the tab key or click on the Flashlight icon . This will take you to the Search and Select: Main Appraiser screen. Identify the correct appraiser and click on the Quick Select icon. This will populate the Main Appraiser field on the Copy Performance Plan screen.



The screenshot shows a web browser window titled "Search and Select List of Values - Microsoft Internet Explorer provided by General Services Administration". The page content is titled "Search and Select: Main Appraiser". At the top right are "Cancel" and "Select" buttons. Below is a "Search" section with instructions: "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." The "Search By" dropdown is set to "Name" and the text field contains "huber". A "Go" button is next to the text field. Below the search section is a "Results" section containing a table with two rows of data. Each row has a radio button, a "Quick Select" icon, and columns for Name, Job, Department, BusinessGroup, and Email Address. The first row shows "Hub" for Name, "0340.Program Management" for Job, "CI" for Department, "General Services Administration" for BusinessGroup, and "huber@gsa.gov" for Email Address. The second row shows "Hub C" for Name, "0560.Budget Analysis" for Job, "WPD" for Department, "General Services Administration" for BusinessGroup, and "huber@gsa.gov" for Email Address. "Cancel" and "Select" buttons are at the bottom right of the results section.

Select	Quick Select	Name	Job	Department	BusinessGroup	Email Address
<input type="radio"/>		Hub	0340.Program Management	CI	General Services Administration	huber@gsa.gov
<input type="radio"/>		Hub C	0560.Budget Analysis	WPD	General Services Administration	huber@gsa.gov

## Step 7

Next, you will need to select the correct performance plan in the Performance Plan Form field. Click on the grey arrow box on the right hand side of the Performance Plan Form field, which will display a drop down list of values. Select the appropriate form by double clicking on it.

\* Performance Plan Form  

\* Rating Period Start Date

\* Rating Period End Date

Performance Plan Issue Date

Mid Year Review Date

- Non-supervisory Associates
- Non-supervisory Associates
- Non-SES Management and Supervisory Associates
- OIG Non-SES Management and Supervisory Employees
- AFGE Bargaining Unit Employees
- NFFE Bargaining Unit Employees

### Step 8

Complete the Plan Information section. First, verify the Rating Period Start and End Date fields.

The Performance Plan Type field will default to Annual but can be changed to Detail by clicking on the grey arrow box in the right hand side of the field.

The Assignment Type field will default to Primary but can be changed to Interim by clicking on the grey arrow box in the right hand side of the field.

The other date fields - Performance Plan Issue Date, Mid-year Review Date, Appraisal Date and PD Review Date can be entered with the appropriate values after the supervisor has met with the employee.

### Step 9

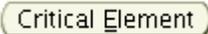
Also, on the Copy Performance Plan screen, the option to identify an employee as unratable is available. If at some point during the rating period an employee becomes unratable, click in the Unratable box and enter a free form text description in the unratable reason field. This can be removed at any time.

#### Unratable Information



The screenshot shows a section titled "Unratable Information" with a horizontal line underneath. Below the line, there is a checkbox labeled "Unratable" and a text input field labeled "Unratable Reason". A mouse cursor is pointing at the "Unratable Reason" label.

### Step 10

If necessary the Critical Element Data, the Element Measure Data and Rating Level Data can all be edited by clicking on the Critical Element button .

Refer to Updating an Existing Performance Plan Guides for further instructions.

### Step 11

Once you have all necessary information entered click on the Save button .