

# Completing a Mid-Year Appraisal

## 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 progress reviews. Once the mid-year appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the mid-year appraisal in APPAS. This guide will walk the main appraiser through the steps to complete the mid-year appraisal.

## Menu Bar


The menu bar is located under the address bar and provides tools needed to navigate through the self-service views.



The Home  icon will return you to the Home page

The Navigator  icon allows you to change responsibilities

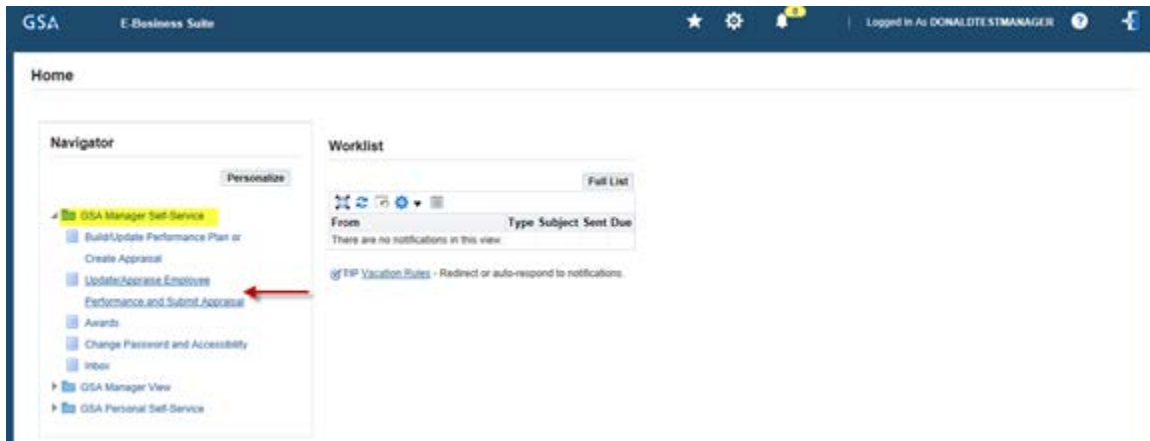
The Favorites  icon will allow you to manage your Favorites

The Notifications  icon allows you to view the notifications in your Worklist

Click on the Logout  icon to exit the application

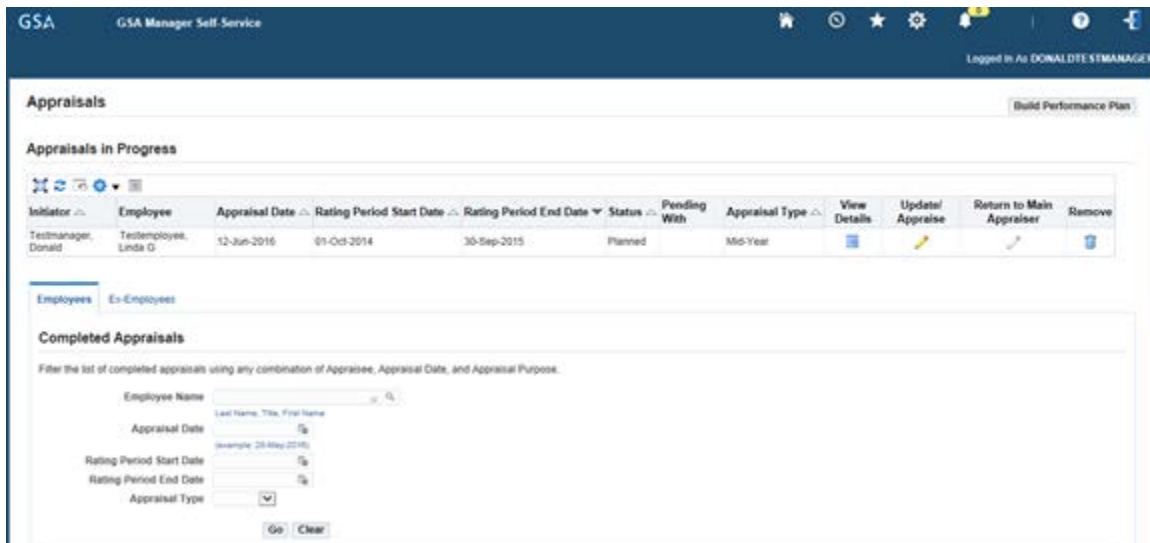
## APPRAISALS IN PROGRESS

After logging in to CHRIS click on the GSA Manager Self-Service responsibility on the left hand side of the screen and then select the Update/Appraise Employee Performance and Submit Appraisal menu option.




This will take you to the Appraisals in Progress screen which is separated in to two sections: “Appraisals in Progress” and “Completed Appraisals”.

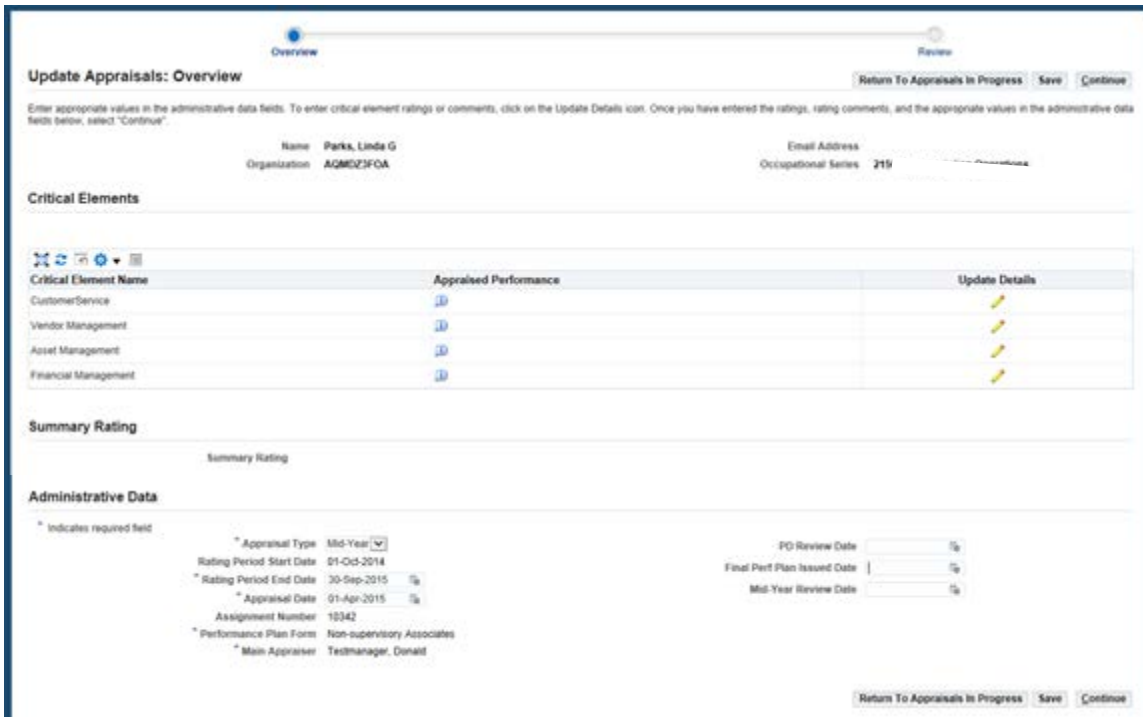
“Appraisals in Progress” gives you a list of Mid Year Appraisals that you created in Build Performance Plan. These are the appraisals we will be working with in this guide.



## GETTING STARTED

### Step 1

Click on the “Update/Appraise” icon  , in the row of the respective employee. This will bring up the “Update Appraisals: Overview” screen.



**Update Appraisals: Overview** Return To Appraisals In Progress Save Continue

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments, click on the Update Details icon. Once you have entered the ratings, rating comments, and the appropriate values in the administrative data fields below, select "Continue".

Name: Parks, Linda G  
Organization: AQMEZ3FOA  
Email Address: [redacted]  
Occupational Series: 219

**Critical Elements**

Critical Element Name	Appraised Performance	Update Details
Customer Service		
Vendor Management		
Asset Management		
Financial Management		

**Summary Rating**

Summary Rating

**Administrative Data**

\* Indicates required field

\* Appraisal Type: Mid-Year

Rating Period Start Date: 01-Oct-2014

\* Rating Period End Date: 30-Sep-2015

\* Appraisal Date: 01-Apr-2015

Assignment Number: 10342

\* Performance Plan Form: Non-supervisory Associates

\* Main Appraiser: Testmanager, Donalt


PO Review Date:

Final Perf Plan Issued Date:

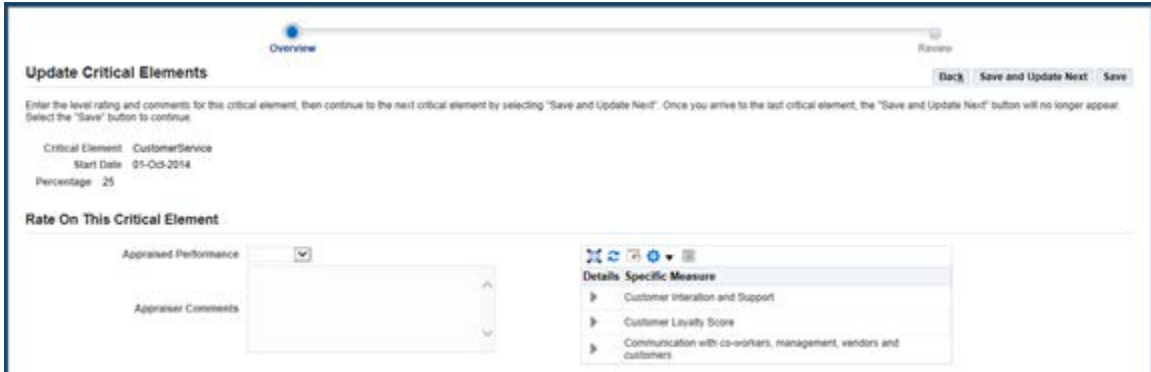
Mid-Year Review Date:


Return To Appraisals In Progress Save Continue

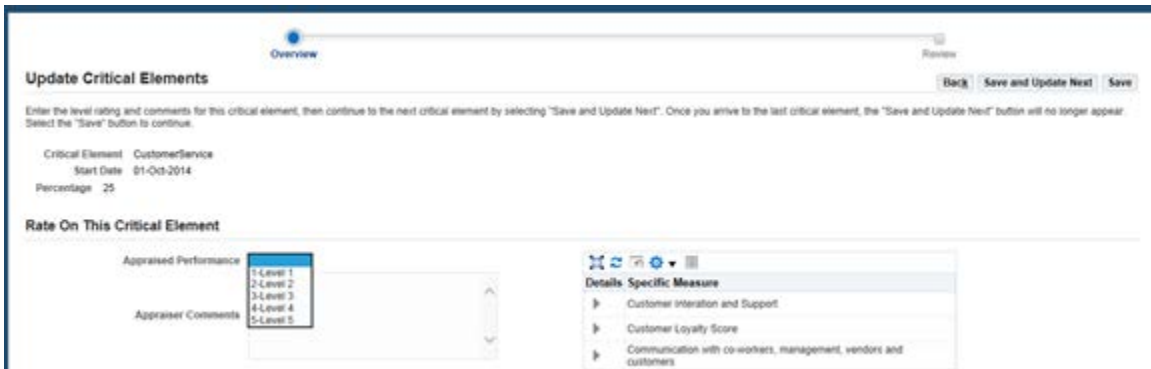
## **Step 2**

Click on the “Update Details” icon  , to begin typing in comments or assigning a rating for AFGE employees.


This will bring up the “Update Critical Elements” screen.

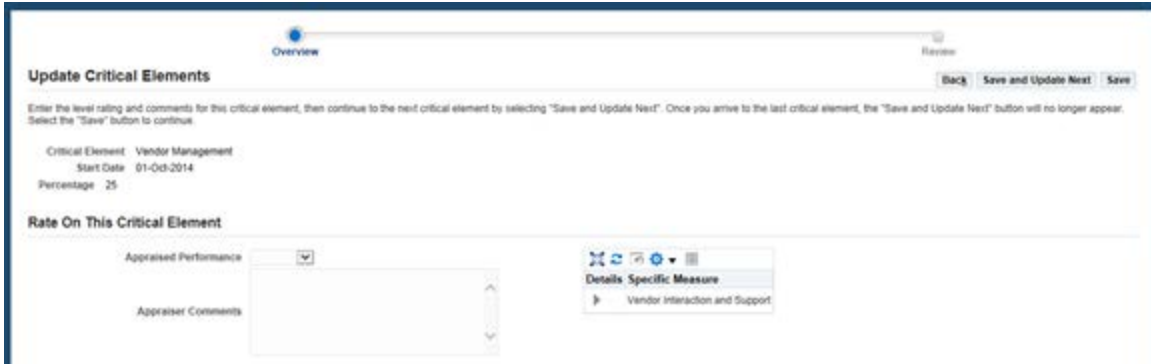



If this is an AFGE employee you may select a rating level from the list of values by clicking on the drop down arrow  . If the employee is not an AFGE employee, you may type your comments by typing directly in the “Appraiser Comments” box, or copy and paste from a Word document.

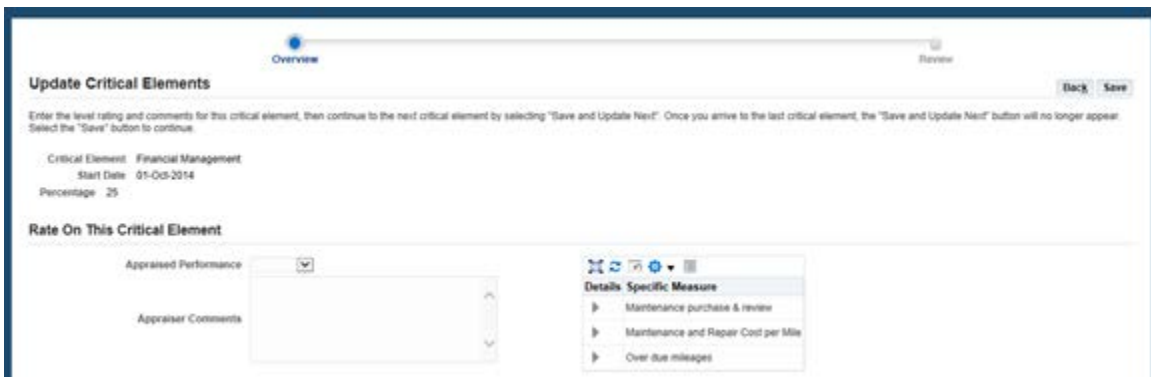


## **Step 3**

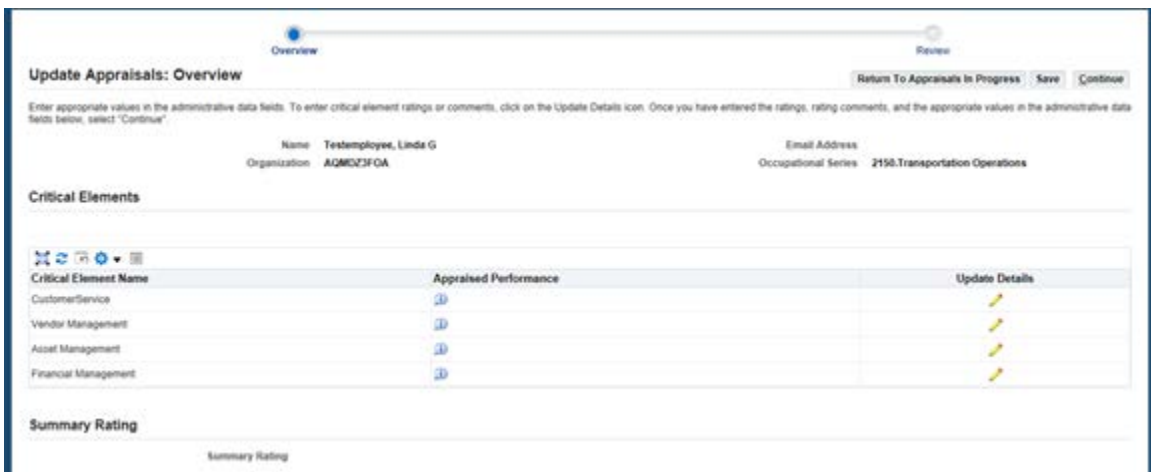
Once you have completed assigning a rating level or typing in comments, click on the “Save and Update Next” button  . This will take you to the next critical element to assign a rating level or type in comments.



Once you have completed assigning a rating level or typing in comments for the last critical element, click on the “Save” button  .



This will return you to the “Updated Appraisals: Overview” screen, where you can see your assigned ratings for an AFGE employee, as well as the “Summary Rating”. NOTE: There will be no summary rating for non-AFGE employees.




**Administrative Data**


\* Indicates required field

* Appraisal Type	Mid-Year		PO Review Date	01-Oct-2014	
Rating Period Start Date	01-Oct-2014		Final Perf Plan Issued Date	01-Oct-2014	
* Rating Period End Date	30-Sep-2015		Mid-Year Review Date		
* Appraisal Date	01-Apr-2015				
Assignment Number	10342				
* Performance Plan Form	Non-supervisory Associates				
* Main Appraiser	Testmanager, Donald				

Return To Appraisals In Progress Save Continue

## Step 4

On this screen you will need to enter the date that the employee was given their performance plan in the Final Perf Plan Issued Date field if it is blank. The system will also require you input a Mid Year Review Date. You can type directly in the date field box using the format Day-Mon-YR format (ie., 13-Mar-2010) or if you click on the calendar icon , a pop-up calendar will appear and allow you to scroll through the days, months and years to select the appropriate date.


When you are finished typing in the date or dates, click on the “Save” button . Your changes will be saved and you will receive a confirmation message at the top of the screen.

**Administrative Data**

\* Indicates required field

* Appraisal Type	Mid-Year		PO Review Date	01-Oct-2014	
Rating Period Start Date	01-Oct-2014		Final Perf Plan Issued Date	01-Oct-2014	
* Rating Period End Date	30-Sep-2015		Mid-Year Review Date	10-Apr-2015	
* Appraisal Date	01-Apr-2015				
Assignment Number	10342				
* Performance Plan Form	Non-supervisory Associates				
* Main Appraiser	Testmanager, Donald				

Return To Appraisals In Progress Save Continue

Click on the “Continue” button  and you will be routed to the “Updated Appraisals: Review” screen.

Overview Review

**Update Appraisals: Review** Cancel Preview Continue Back

To make changes to the appraisal, click Back.

Name: Testemployee, Linda G	Email Address:
Organization: AGMDZ3FOA	Occupational Series: 2150.Transportation Operations

**Administrative Data**

Initiator: Testmanager, Donald	Main Appraiser: Testmanager, Donald
Appraisal Type: Mid-Year	Appraisal Date: 01-Apr-2015
Rating Period Start Date: 01-Oct-2014	Final Perf Plan Issued Date: 01-Oct-2014
Rating Period End Date: 30-Sep-2015	Mid-Year Review Date: 10-Apr-2015
Performance Plan Form: Non-supervisory Associates	

**Critical Elements** Return to Top

Show All Details | Hide All Details

Critical Element Name	Appraised Performance
CustomerService	
Vendor Management	
Asset Management	
Financial Management	

## Step 5

Review the screen for accuracy and if everything is correct click on the “Continue” button [Continue](#). This will take you to the “Main Appraiser Review” screen. You may make changes to the Main Appraiser on this screen if necessary by clicking on the “Change Main Appraiser” button [Change Main Appraiser](#).

NOTE: Refer to the User Guide titled “Change Main Appraiser” for instructions on changing the Main Appraiser.

**Confirmation**  
Your changes have been saved.

**Main Appraiser Review** Return To Appraisals In Progress Edit Appraisal Data Summary Ratings and Comments

Select the “Summary Ratings and Comments” button to move forward. This page allows you another opportunity to review, and change the main appraiser, if applicable.

Name: Testemployee, Linda G	Email Address:
Organization: AGMDZ3FOA	Occupational Series: 2150.Transportation Operations

**Administrative Data** Change Main Appraiser

Initiator: Testmanager, Donald	Appraisal Date: 01-Apr-2015
Appraisal Type: Mid-Year	PD Review Date: 01-Oct-2014
Rating Period Start Date: 01-Oct-2014	Final Perf Plan Issued Date: 01-Oct-2014
Rating Period End Date: 30-Sep-2015	Mid-Year Review Date: 10-Apr-2015
Performance Plan Form: Non-supervisory Associates	
Main Appraiser: Testmanager, Donald	

**Critical Elements**

Show All Details | Hide All Details

Critical Element Name	Appraised Performance
CustomerService	
Vendor Management	
Asset Management	
Financial Management	

Click on the “Summary Ratings and Comments” button

**Summary Ratings and Comments**

to continue, or the “Return to Appraisals in

Progress” button

**Return To Appraisals In Progress**

if you want to save your work and

finish at a later time.

## **Step 6**

Clicking on the “Summary Ratings and Comments” button

**Summary Ratings and Comments**

will take you to the Summary Ratings and Comments page. You will type in your summary rating overall comments and development and training comments on this page.

You may type directly in the box or copy and paste from a Word document. After you have finished typing in your comments, click on the “Save” button **Save**.

The screenshot shows a web form titled "Summary Ratings and Comments". At the top right, there are navigation buttons: "Back", "Edit Appraisal", "Save", and "Save and Continue". Below the title, a note states: "Note that the calculated summary rating for the appraisal is below. Include your overall comments, and your development and training comments. Once this is complete, select the 'Save and Continue' button to move forward." The form displays employee information: Name: Testemployee, Linda G; Organization: AQMEZ3FOA; Email Address: [redacted]; Occupational Series: 2150.Transportation Operations. A section titled "Critical Elements" contains a table with columns "Details" and "Critical Element Name". The table lists four elements: CustomerService, Vendor Management, Asset Management, and Financial Management, each with a right-pointing arrow in the "Details" column. Below this is a section titled "Summary Rating and Comments" which includes a "Summary Rating" dropdown menu and a large text area for "Overall Comments".



Attachments: Summary Rating and Comments

Add Attachment									
Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	
No results found.									

Development and Training

Comments

Attachments: Development and Training

Add Attachment									
Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	
No results found.									

[Back](#)
[Edit Appraisal](#)
[Save](#)
[Save and Continue](#)

## **Step 7**

Once you have “Saved” your comments, click on the “Printable Form” button [Printable Form](#) to generate a printable PDF file of the mid-year appraisal. Once the form has printed, use the “Return to Appraisals in Progress” button [Return To Appraisals In Progress](#) to return to Appraisals in Progress. Repeat **Steps 1 through 6** for each of your employees.

Once you have completed the mid year reviews and printed the Mid Year appraisal forms for all of your employees, you are ready to meet with your employees.

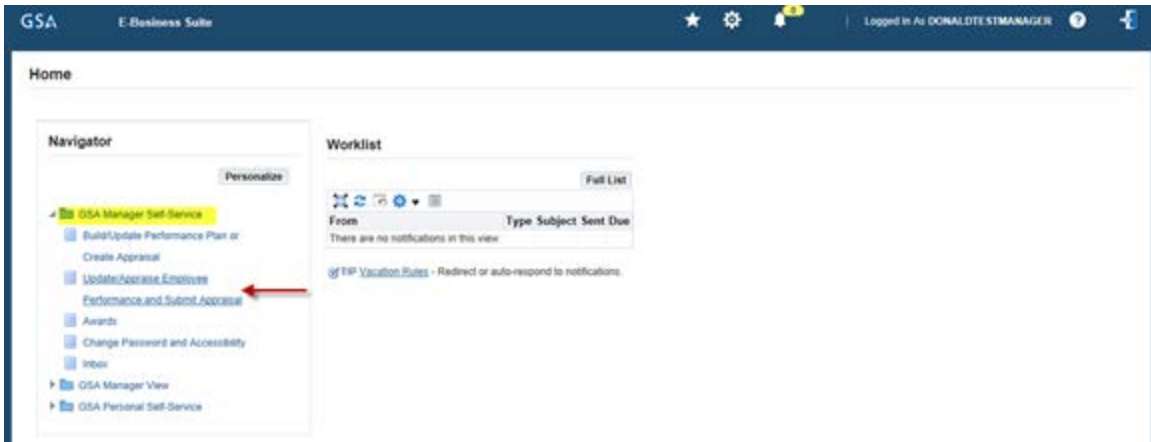
## **Step 8**

Meet with each of your employees to discuss their progress and ask them to sign the printed Mid Year Appraisal form. You can also use this as an opportunity to discuss any changes that need to be made to employee performance plans.

## **Step 9**

After meeting with your employees, return to CHRIS to submit your Mid Year Appraisals in APPAS.

After logging in to CHRIS click on the GSA Manager Self-Service responsibility on the left hand side of the screen and then select the Update/Appraise Employee Performance and Submit Appraisal menu option

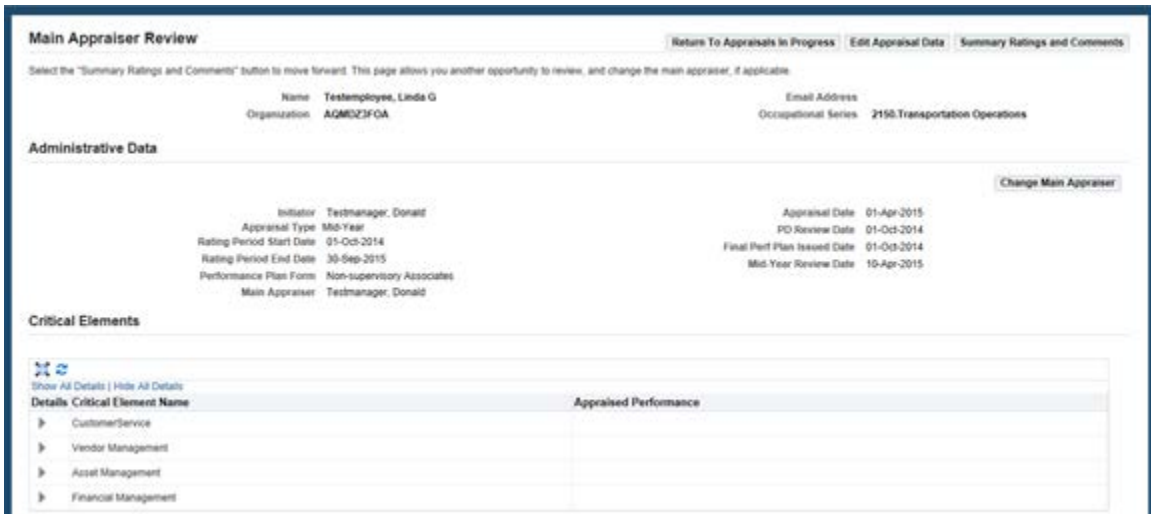


This will take you to the Appraisals in Progress screen, where you will see a list of your employees with Mid Year Appraisals in an “Ongoing” or “Saved” status.




### Step 10

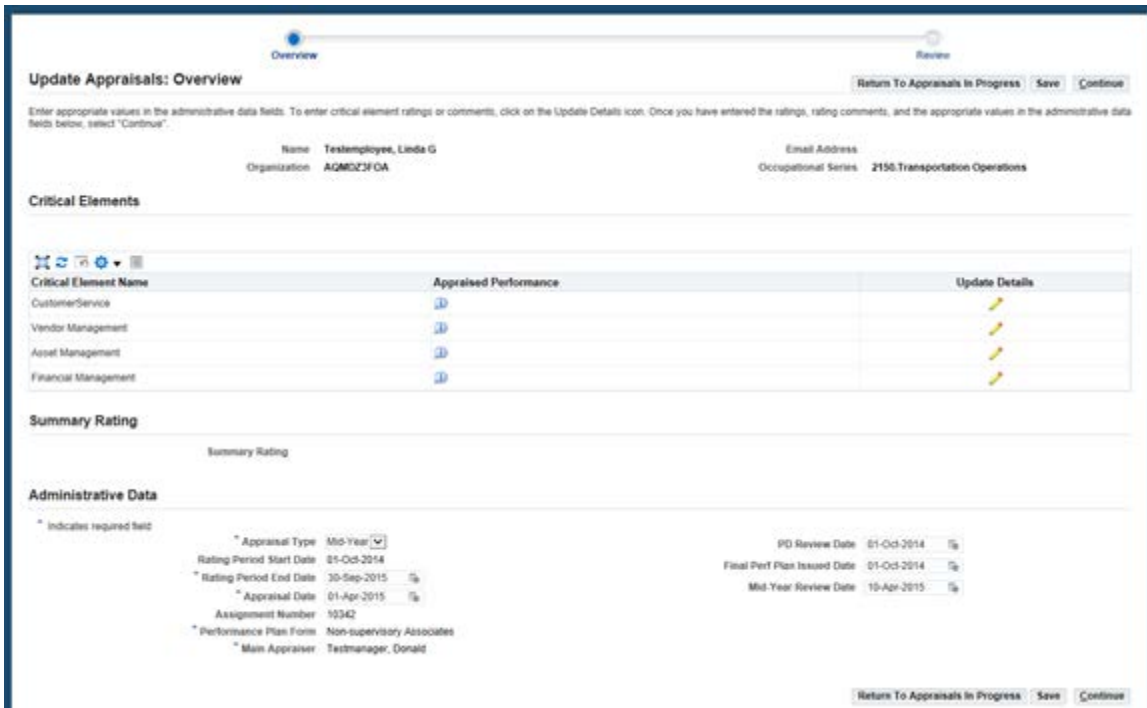
Click on the “Update/Appraise” icon , in the row of the respective employee’s name. This will bring up the “Main Appraiser Review” screen.



## Step 11

Click on the “Edit Data Appraisal” button [Edit Appraisal Data](#). This will take you to the “Update Appraisals: Overview” screen. Review the information on the screen and if there are no changes to make, then click on the “Continue” button [Continue](#).

If changes are needed to the Critical Elements, click on the “Update Details” icon  to make changes to the comments or rating level (for AFGE employees). You can also update any of the date fields if necessary.



**Update Appraisals: Overview**

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments, click on the Update Details icon. Once you have entered the ratings, rating comments, and the appropriate values in the administrative data fields below, select "Continue".

Name: TestEmployee, Linda G  
Organization: AQMDZFOA  
Email Address:  
Occupational Series: 2150.Transportation Operations

**Critical Elements**

Critical Element Name	Appraised Performance	Update Details
CustomerService		
Vendor Management		
Asset Management		
Financial Management		

**Summary Rating**

Summary Rating

**Administrative Data**

\* Indicates required field

\* Appraisal Type: Mid-Year  
Rating Period Start Date: 01-Oct-2014  
\* Rating Period End Date: 30-Sep-2015  
\* Appraisal Date: 01-Apr-2015  
Assignment Number: 10342  
\* Performance Plan Form: Non-supervisory Associates  
\* Main Appraiser: Testmanager, Donald

PD Review Date: 01-Oct-2014  
Final Perf Plan Issued Date: 01-Oct-2014  
Mid-Year Review Date: 10-Apr-2015

Once you have completed any necessary changes, or no changes are needed, click on the “Continue” button [Continue](#).

## Step 12

This will take you to an “Update Appraisals: Review” screen. On this screen, you can verify any changes made on the previous screen. If the information is accurate, click on the “Continue” button [Continue](#).

### Step 13

You will receive a confirmation that all your changes have been saved and you can now click on the “Summary Ratings and Comments” button

[Summary Ratings and Comments](#)

### Step 14

On the “Summary Ratings and Comments” screen you now have the opportunity to make any changes to your comments and print a new Mid Year Appraisal form if needed to document your changes. NOTE: You must click on the “Save”

button [Save](#) to save any changes you make to this screen before printing a new Mid Year Appraisal Form or your changes will not print on the new form.

**Summary Ratings and Comments** Back Edit Appraisal Save Save and Continue

Note that the calculated summary rating for the appraisal is below. Include your overall comments, and your development and training comments. Once this is complete, select the "Save and Continue" button to move forward.

Name: TestEmployee, Linda G      Email Address:  
 Organization: AQMCZ3FOA      Occupational Series: 2150.Transportation Operations

**Critical Elements**

Show All Details | Hide All Details

Details	Critical Element Name
▶	CustomerService
▶	Vendor Management
▶	Asset Management
▶	Financial Management

**Summary Rating and Comments**

Summary Rating:   
 Overall Comments:

**Attachments: Summary Rating and Comments**

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

**Development and Training**

Comments:

**Attachments: Development and Training**

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Back Edit Appraisal Save Save and Continue

Once you have "Saved" any changes and printed a new Mid Year Appraisal form, you should click on the "Continue" button  .

## **Step 15**

The "Final Review" Screen will appear and you have one final opportunity to go back and make any changes or print a new mid-year Appraisal form. If no changes are necessary you may click on the "Submit" button  to complete your mid year progress review.

**Final Review** Return To Appraisals In Progress Back Edit Appraisal Submit Printable Form

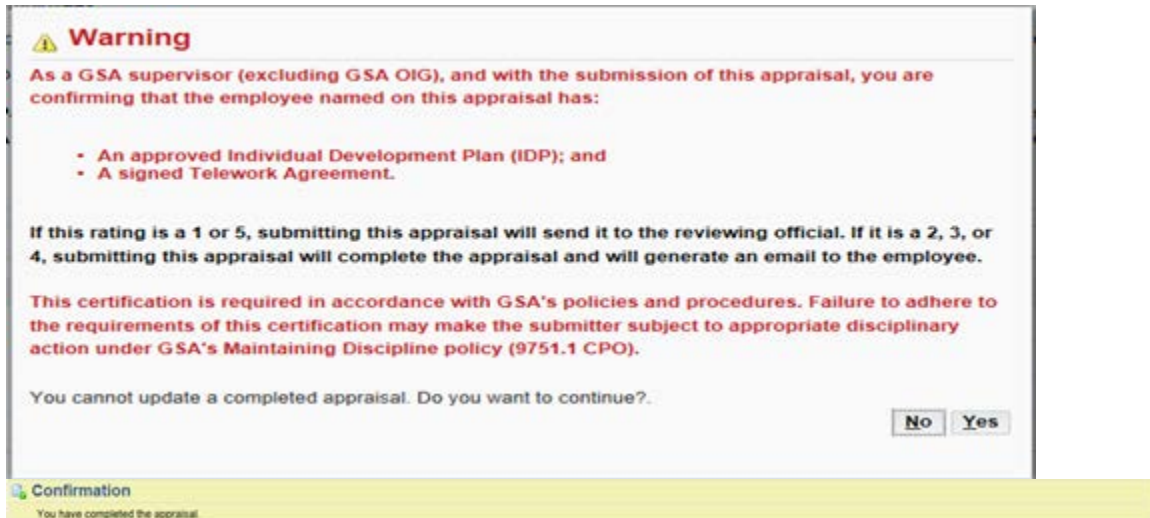
If you have not met with your employee, do not submit the appraisal. Generate a PDF file of the appraisal to share with the employee by selecting the "Printable Form" button. Once you have printed out the form, click on the "Return to Appraisals In Progress" button to begin evaluating any additional employees.

If the summary rating for this appraisal is a 1 or 5, second level approval is required. If this applies to your appraisal, verify that the reviewing official below is your supervisor of record. If it is not, make the necessary change.

If you have met with your employee and are ready to submit the appraisal, select the "Submit" button.

## **Step 16**

Once you click on the “Submit” button  , you will receive a “Warning” message asking if you are your sure you want to submit the Mid Year Appraisal. Click on the “Yes” button  .



You will need to repeat **Steps 9 through 16** to complete Mid Year Appraisals for all of your employees.