CHRIS User Guide: Creating an Annual Appraisal

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. This user guide offers instructions on creating the annual appraisal, from the performance plan.

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] icon will return you to the Home page

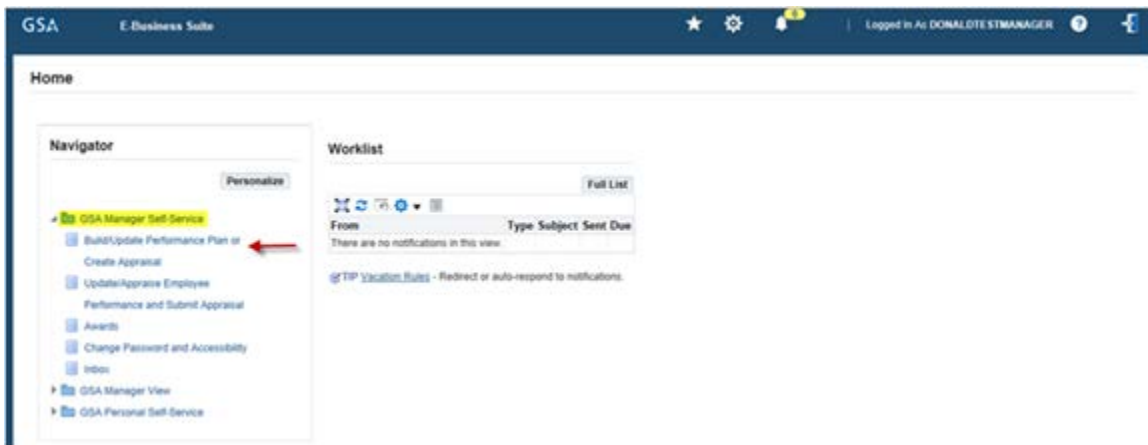The Navigator [icon] icon allows you to change responsibilities

The Favorites [icon] icon will allow you to manage your Favorites

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

Click on the Logout [icon] icon to exit the application

Entering the Performance Plan Responsibility

If you are a manager, select **GSA Manager Self-Service** from the menu and then select the **Build/Update Performance Plan or Create Appraisal** menu option.

All other users select **GSA Performance Plan.**

Querying Employees

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 🔍 .
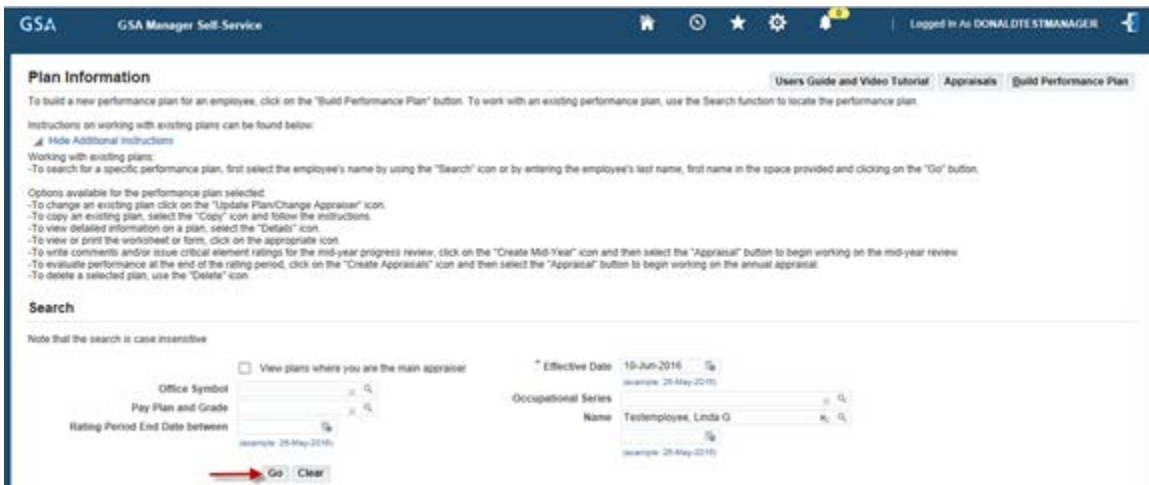

This will take you to the **Search and Select: Name** screen. Identify the correct employee and click on the **Quick Select** icon 📇 .
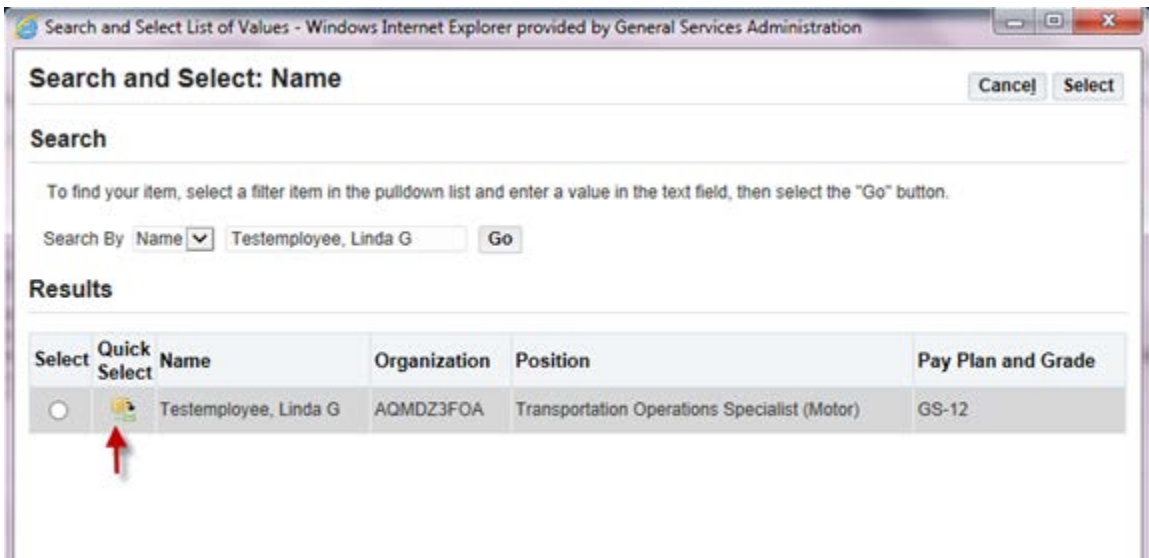
Next, select the **Go** button to run the query.

For each employee, begin by clicking on the **Details** icon ▭ to ensure that the performance plan is current. If any changes were made since the beginning of the year that are not documented in CHRIS, close the **Details** screen and then

click on the **Update Plan/Change Appraiser** icon ✎, to make changes to the performance plan.

Creating the Annual Appraisal

Once you have determined that the performance plan is accurate, create the Annual Appraisal record by clicking on the **Create Appraisal** icon ⬛ . If the icon is not in color, then the appraisal has already been created, and can be located in the main appraiser's **Appraisals** section, of **Manager Self-Service**.

After you click on the **Create Appraisal** icon , you will receive a warning message. Click the **Yes** button, to confirm creation of the annual appraisal.
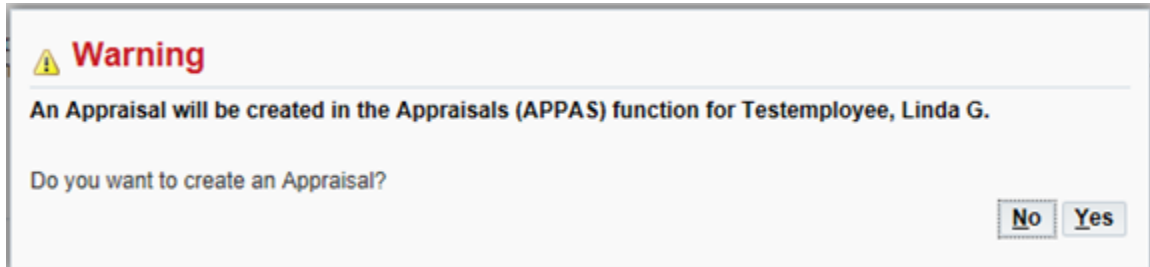
After clicking on the **Yes** button, the system will return you to the **Build Performance Plan screen** and you will see a confirmation message that the Annual Appraisal has been created.
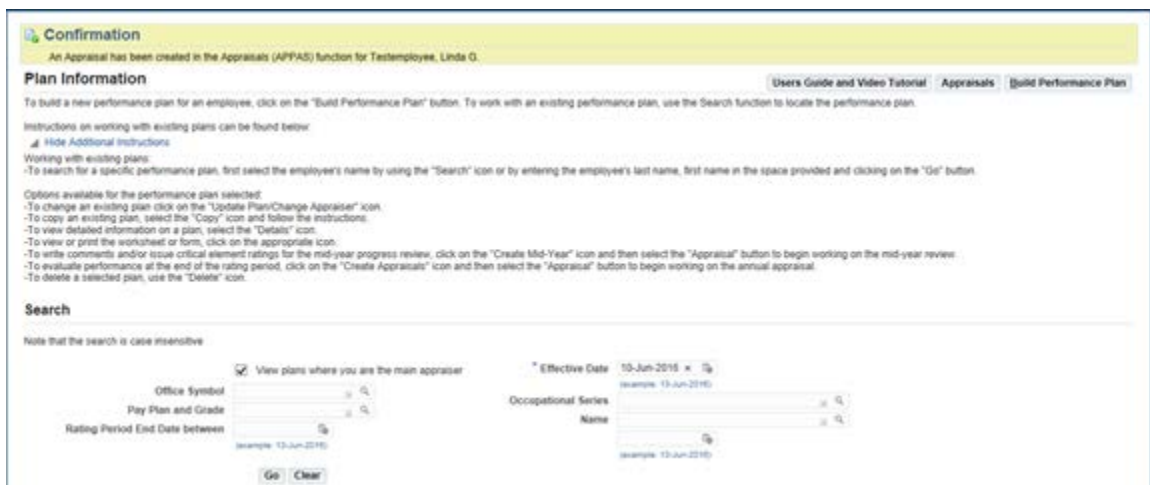
When you have finished creating annual appraisals for all of your employees, click on the **Appraisals** button, in the upper right hand corner of your screen. This will take you to **Manager Self-Service ❼ Appraisals**.
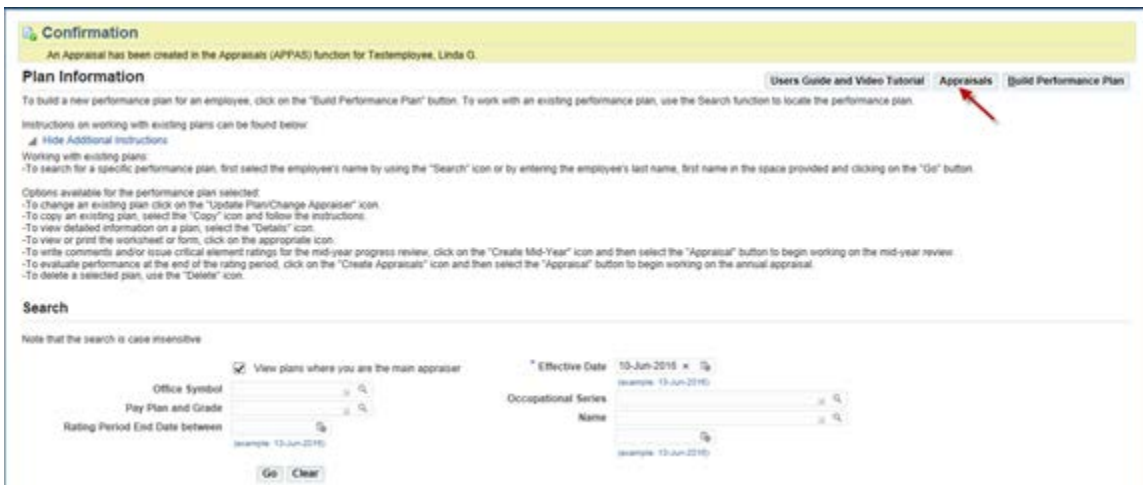
Now in **Manager Self-Service ❼ Appraisals**, you can begin the appraisal. For instructions on this process, please refer to the user guide, **Completing an Annual Appraisal**.
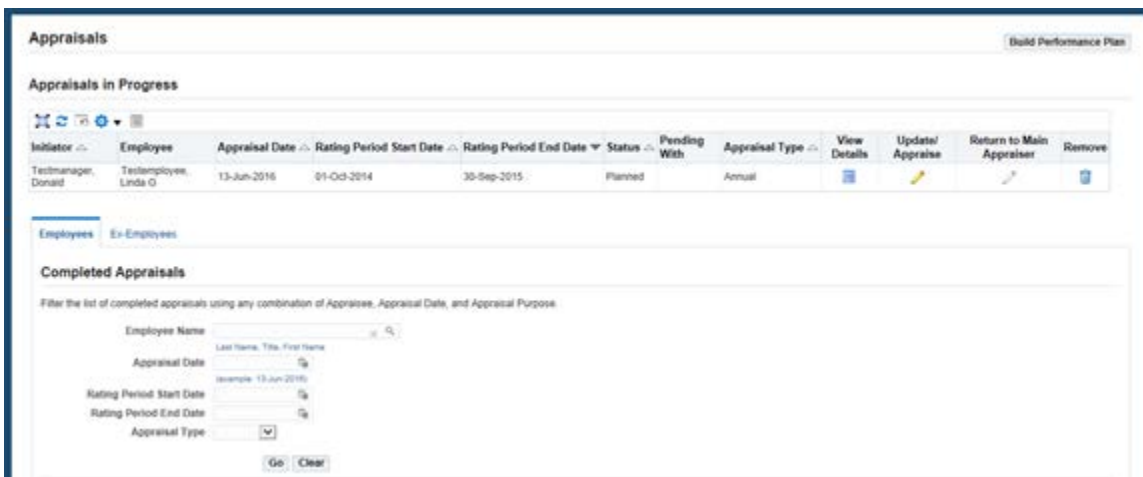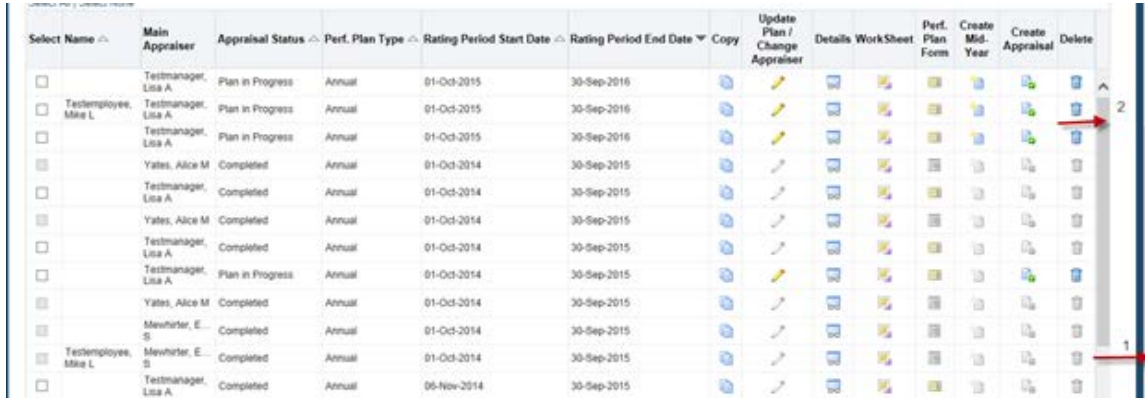

New Features

New Features include:
● Vertical Scroll
● Detach
● Refresh
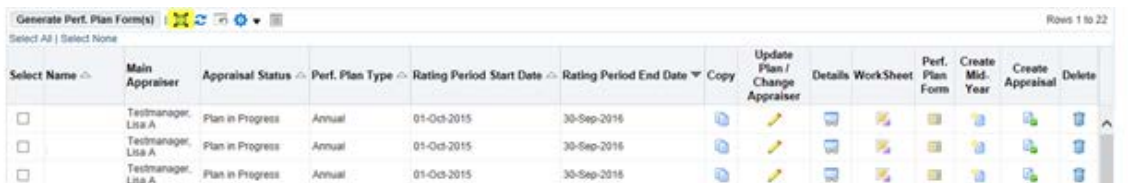● Show/Hide Columns
● Column Reorder
● Column Freeze

Vertical Scroll

Scroll bar (1) on the far right side will allow you to view the entire screen.
Scroll bar (2) located within the table allows you to view all the records.
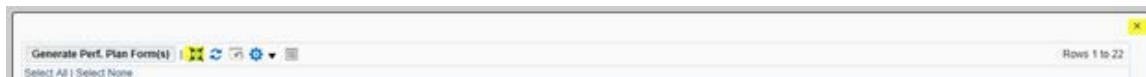

Detach Table ⊠ ⁱ icon allows you to focus on the details of the specific table.

Click the Detach Table ⊠ ⁱ icon again or the 'x' in the upper right hand corner to close the window

Refresh ⟳ icon is used to re-execute the table query and fetch any new rows in this table

Show/Hide and Reorder columns from Table Settings

Click on the **Table Settings** ⚙ icon to Show/Hide and Reorder columns

Remove ✔ checkmark to "Hide" the Column
To unhide the Column, reinsert the checkmark
Click on the ▲ ▼ up and down arrows to reorder the columns

Show/Hide, Sort and Reorder columns from Main Screen
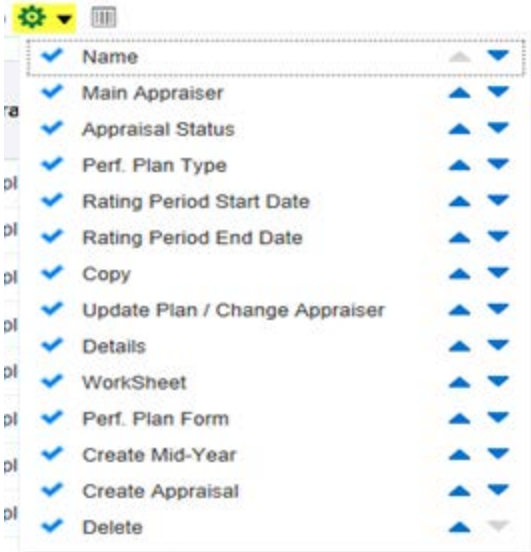
To hide a column hover over the column name until you see the minus icon, click on the icon and the column will be hidden

To unhide a column click on the Table Setting ⚙ icon and click on the column name. A check mark should be next to the column name.

Sort the records in ascending or descending order by clicking on the arrow next to the column name

Click on the Column Name and drag it left or right to the position you prefer

Column Freeze ▥ icon can only be used when the table has a horizontal scroll bar.

Click the **Reset Table Settings** icon to revert the Columns back to the default settings on the Plan Information screen