

# 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 will return you to the Home page

The Navigator  icon allows you to change responsibilities

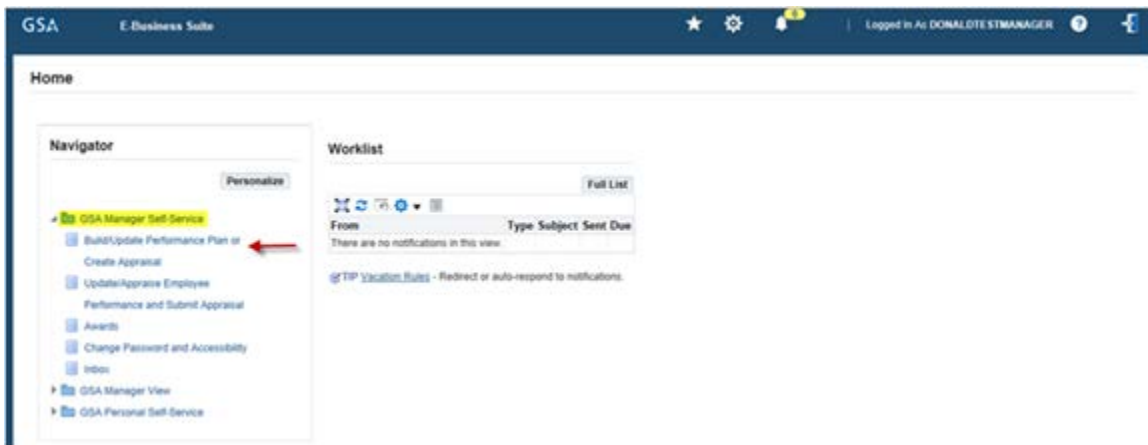
The Favorites  icon will allow you to manage your Favorites

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

Click on the Logout  icon to exit the application

## 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**.

**Plan Information** Users Guide and Video Tutorial | Appraisals | Build Performance Plan

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

Instructions on working with existing plans can be found below.

**Hide Additional Instructions**

Working with existing plans:

- To search for a specific performance plan, first select the employee's name by using the "Search" icon or by entering the employee's last name, first name in the space provided and clicking on the "Go" button.

Options available for the performance plan selected:

- To change 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 on 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 select the "Appraisal" button to begin working on the mid-year review.
- To evaluate performance at the end of the rating period, click on the "Create Appraisal" icon and then select the "Appraisal" button to begin working on the annual appraisal.
- To delete a selected plan, use the "Delete" icon.

**Search**

Note that the search is case insensitive

View plans where you are the main appraiser

Effective Date: 12-Jun-2016 (example: 26-May-2016)

Office Symbol:

Pay Plan and Grade:

Rating Period End Date between: (example: 26-May-2016)

Occupational Series:

Name:

Go Clear

Generate Perf. Plan Form(s) | Rows 1 to 40

Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year
<input type="checkbox"/> Testemployee, Linda D	Testmana, Donald	Plan in Progress	Annual	01-Oct-2014	30-Sep-2015						

## 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

**Plan Information** Users Guide and Video Tutorial | Appraisals | Build Performance Plan

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

Instructions on working with existing plans can be found below.

**Hide Additional Instructions**

Working with existing plans:

- To search for a specific performance plan, first select the employee's name by using the "Search" icon or by entering the employee's last name, first name in the space provided and clicking on the "Go" button.

Options available for the performance plan selected:

- To change 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 on 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 select the "Appraisal" button to begin working on the mid-year review.
- To evaluate performance at the end of the rating period, click on the "Create Appraisal" icon and then select the "Appraisal" button to begin working on the annual appraisal.
- To delete a selected plan, use the "Delete" icon.

**Search**

Note that the search is case insensitive

View plans where you are the main appraiser

Effective Date: 10-Jun-2016 (example: 26-May-2016)

Office Symbol:

Pay Plan and Grade:

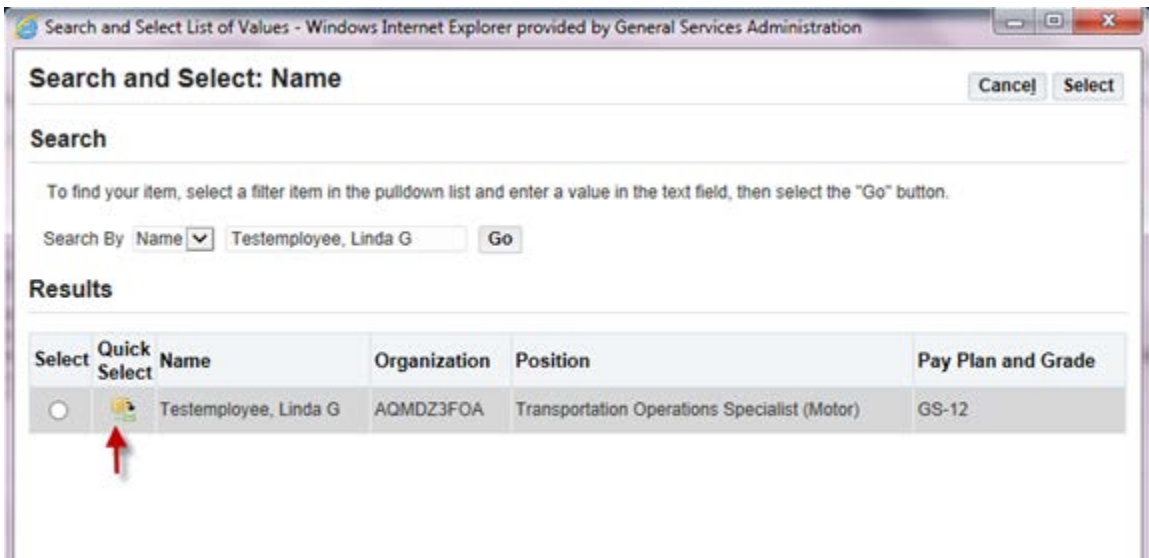
Rating Period End Date between: (example: 26-May-2016)

Occupational Series:

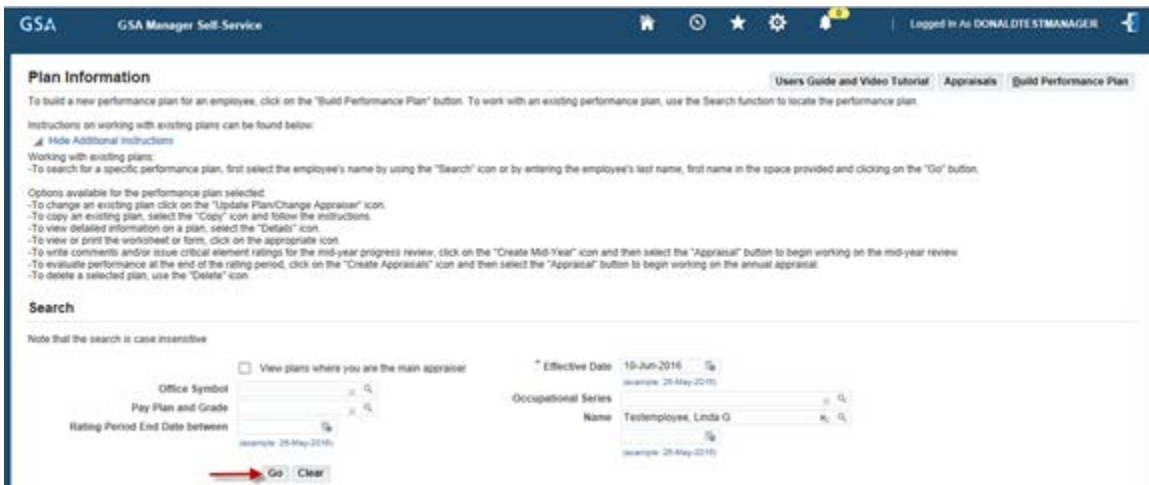
Name: Testemployee Loading


Go Clear

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.

**Plan Information** Users Guide and Video Tutorial | Appraisals | Build Performance Plan

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

Instructions on working with existing plans can be found below:

[Hide Additional Instructions](#)

Working with existing plans:

- To search for a specific performance plan, first select the employee's name by using the "Search" icon or by entering the employee's last name, first name in the space provided and clicking on the "Go" button.

Options available for the performance plan selected:

- To change 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 on 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 select the "Appraisal" button to begin working on the mid-year review.
- To evaluate performance at the end of the rating period, click on the "Create Appraisals" icon and then select the "Appraisal" button to begin working on the annual appraisal.
- To delete a selected plan, use the "Delete" icon.

**Search**

Note that the search is case insensitive

View plans where you are the main appraiser

Effective Date: 10-Jun-2015 (example: 10-Jun-2015)

Office Symbol:

Pay Plan and Grade:

Rating Period End Date between:  to  (example: 10-Jun-2015)

Occupational Series:


Name:  (example: 10-Jun-2015)

Generate Perf. Plan Form(s) |      Rows 1 to 40

Select All | Select None

Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year
<input type="checkbox"/> Testemployee, Linda G	Testmans, Donald	Plan in Progress	Annual	01-Oct-2014	30-Sep-2015	<input type="button" value="Copy"/>	<input type="button" value="Update"/>	<input type="button" value="Details"/>	<input type="button" value="Worksheet"/>	<input type="button" value="Form"/>	<input type="button" value="Create"/>

## 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**.

**Plan Information** Users Guide and Video Tutorial | Appraisals | Build Performance Plan

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

Instructions on working with existing plans can be found below:

[Hide Additional Instructions](#)

Working with existing plans:

- To search for a specific performance plan, first select the employee's name by using the "Search" icon or by entering the employee's last name, first name in the space provided and clicking on the "Go" button.

Options available for the performance plan selected:

- To change 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 on 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 select the "Appraisal" button to begin working on the mid-year review.
- To evaluate performance at the end of the rating period, click on the "Create Appraisals" icon and then select the "Appraisal" button to begin working on the annual appraisal.
- To delete a selected plan, use the "Delete" icon.

**Search**

Note that the search is case insensitive

View plans where you are the main appraiser

Effective Date: 10-Jun-2015 (example: 10-Jun-2015)

Office Symbol:

Pay Plan and Grade:

Rating Period End Date between:  to  (example: 10-Jun-2015)

Occupational Series:

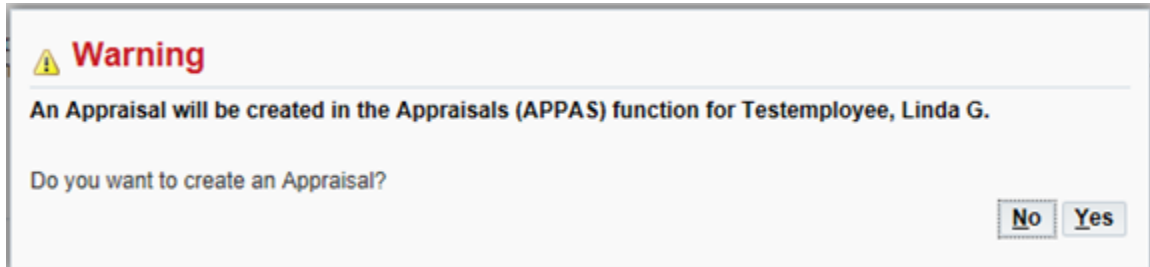
Name:  (example: 10-Jun-2015)

Generate Perf. Plan Form(s) |     Rows 1 to 40

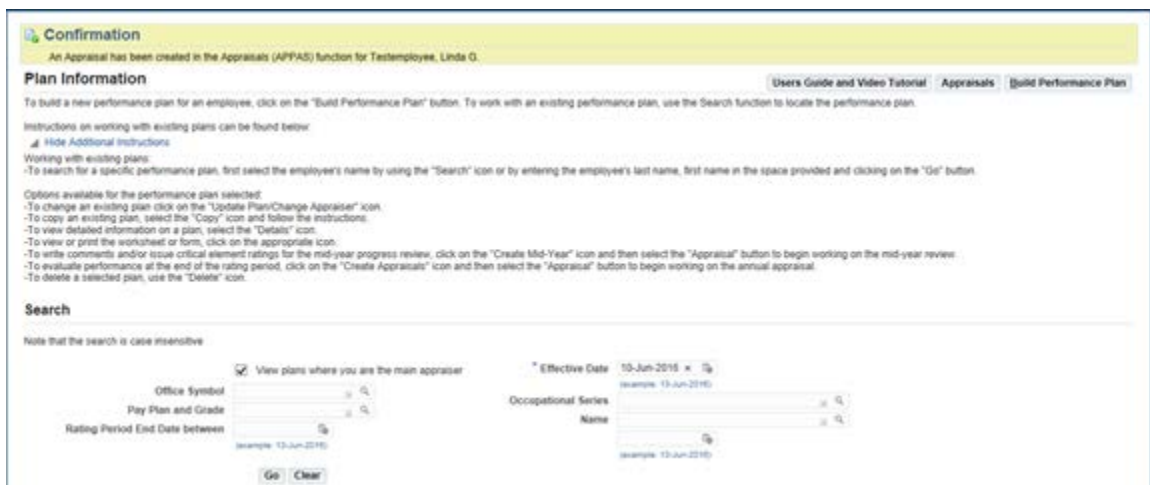
Select All | Select None


Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal
<input type="checkbox"/> Testemployee, Linda G	Testmans, Donald	Plan in Progress	Annual	01-Oct-2014	30-Sep-2015	<input type="button" value="Copy"/>	<input type="button" value="Update"/>	<input type="button" value="Details"/>	<input type="button" value="Worksheet"/>	<input type="button" value="Form"/>	<input type="button" value="Create"/>	<input type="button" value="Create"/>

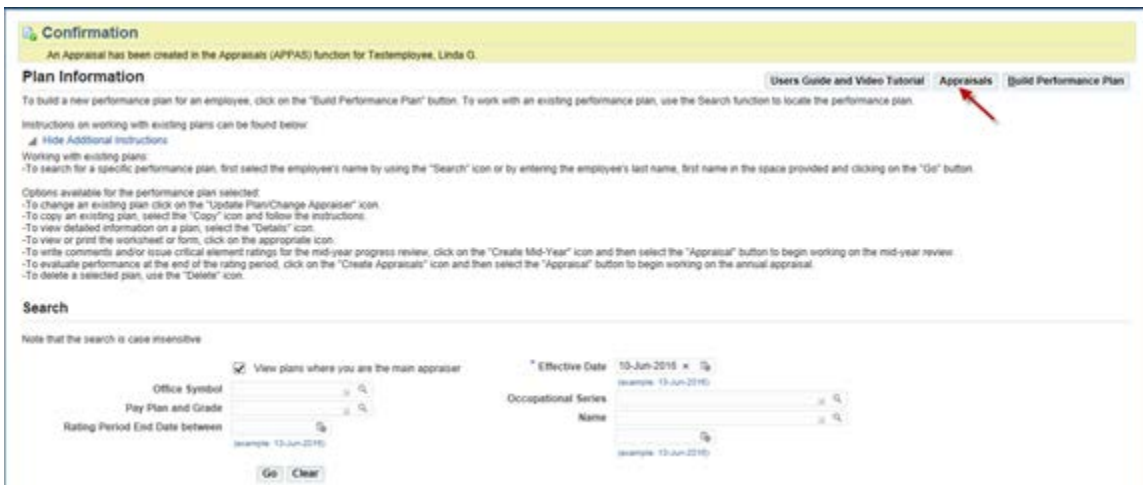
After you click on the **Create Appraisal** icon  , you will receive a warning message. Click the **Yes** button, to confirm creation of the annual appraisal.



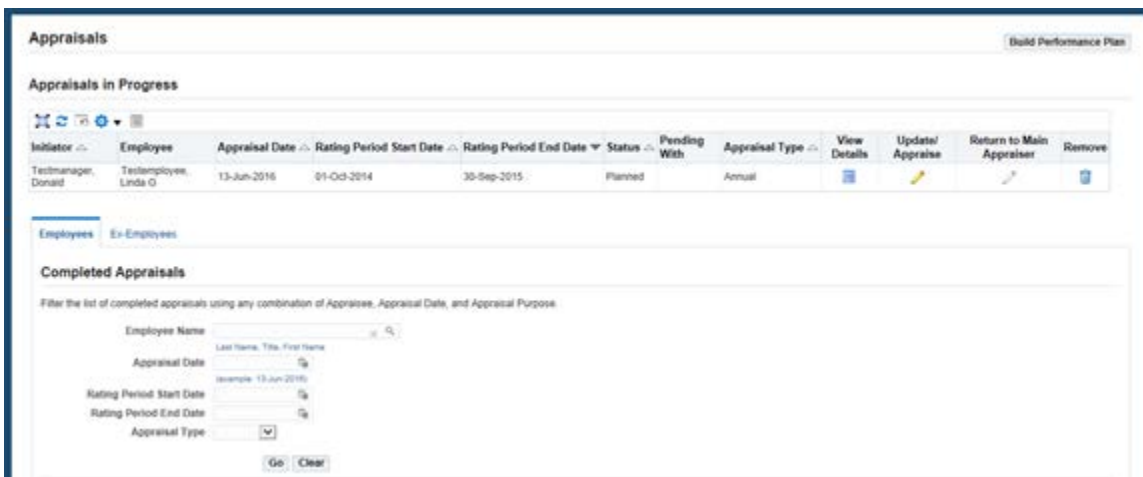
After clicking on the **Yes** button, the system will return you to the **Build Performance Plan screen** and you will see a confirmation message that the Annual Appraisal has been created.



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**  **Appraisals**.



Now in **Manager Self-Service** **Appraisals**, you can begin the appraisal. For instructions on this process, please refer to the user guide, **Completing an Annual Appraisal**.



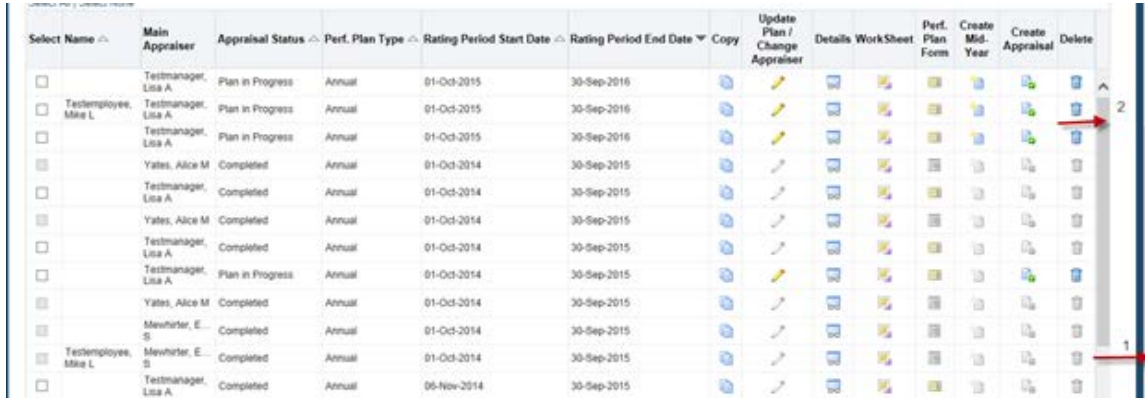
## New Features

New Features include:


- Vertical Scroll
- Detach
- Refresh
- Show/Hide Columns
- Column Reorder
- Column Freeze

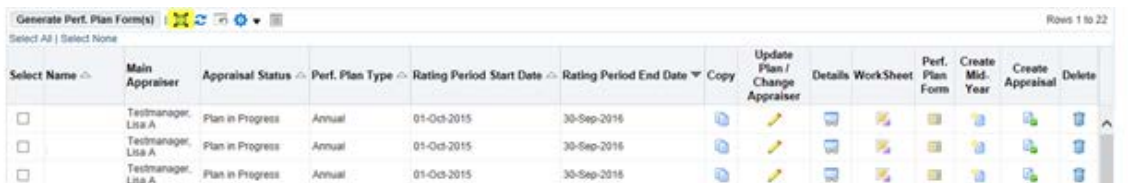
## Vertical Scroll

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.




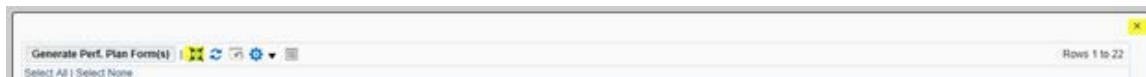
Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							
<input type="checkbox"/>	Testemployee, Mike L	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							
<input type="checkbox"/>	Yates, Alice M	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Testmanager, Lisa A	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Yates, Alice M	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Testmanager, Lisa A	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Yates, Alice M	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Mewhiter, E. S	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Testemployee, Mike L	Completed	Annual	01-Oct-2014	30-Sep-2015							
<input type="checkbox"/>	Testmanager, Lisa A	Completed	Annual	06-Nov-2014	30-Sep-2015							


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




Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal	Delete
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							
<input type="checkbox"/>	Testmanager, Lisa A	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							

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

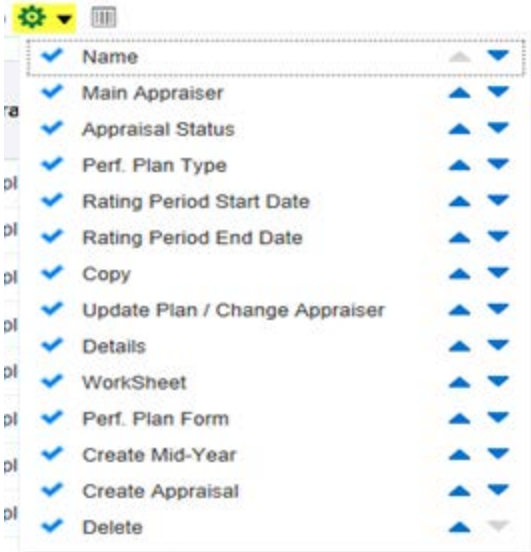


**Refresh**  icon is used to re-execute the table query and fetch any new rows in this table

## 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