

CHRIS User Guide: Completing an Annual Appraisal

CHRIS Responsibility Required: Manager Self-Service

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. Once the annual appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the annual in the Appraisals section of APPAS. This guide offers instructions for completing the annual 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

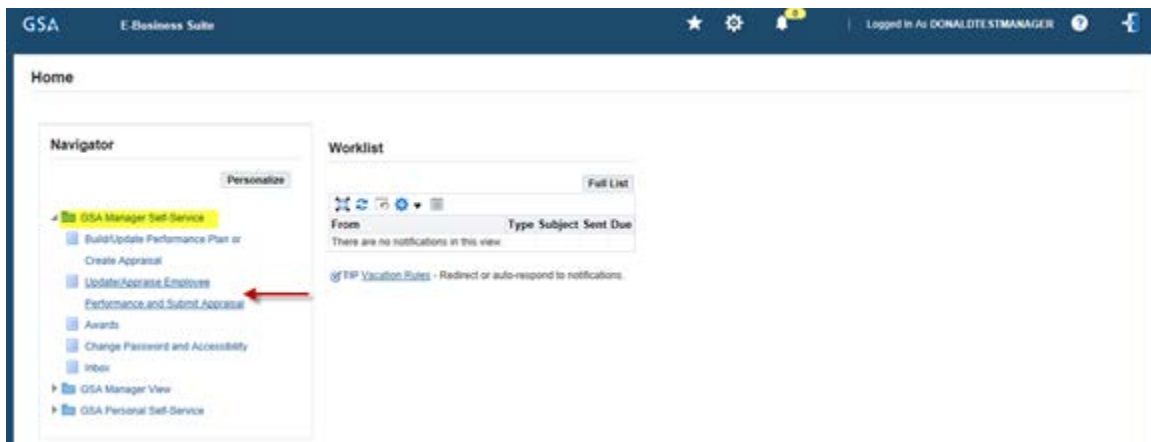
The Favorites  icon will allow you to manage your Favorites

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

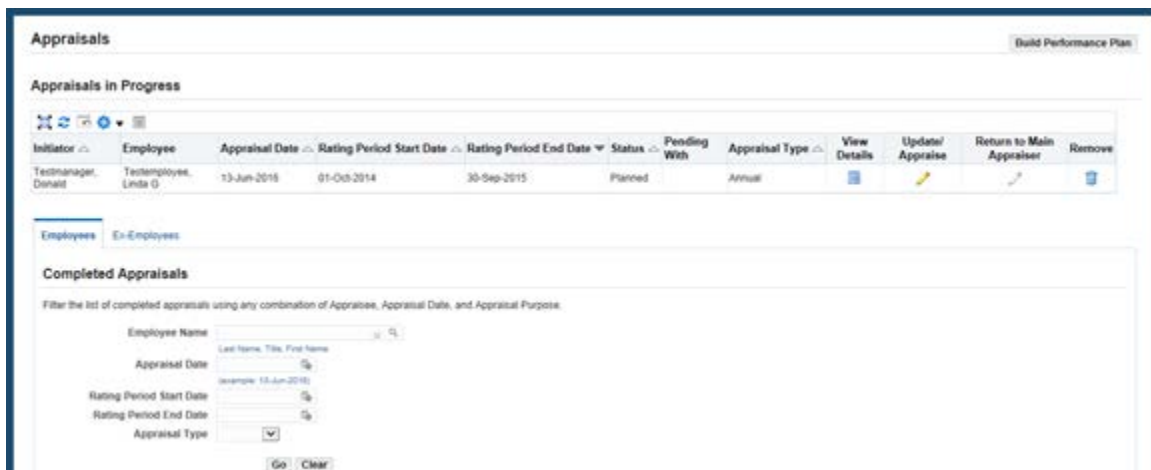
Click on the Logout  icon to exit the application

Locating the Appraisal


After logging in to CHRIS, click on the **GSA Manager Self-Service** responsibility, then select the Update/Appraise Employee Performance and Submit Appraisal menu option.

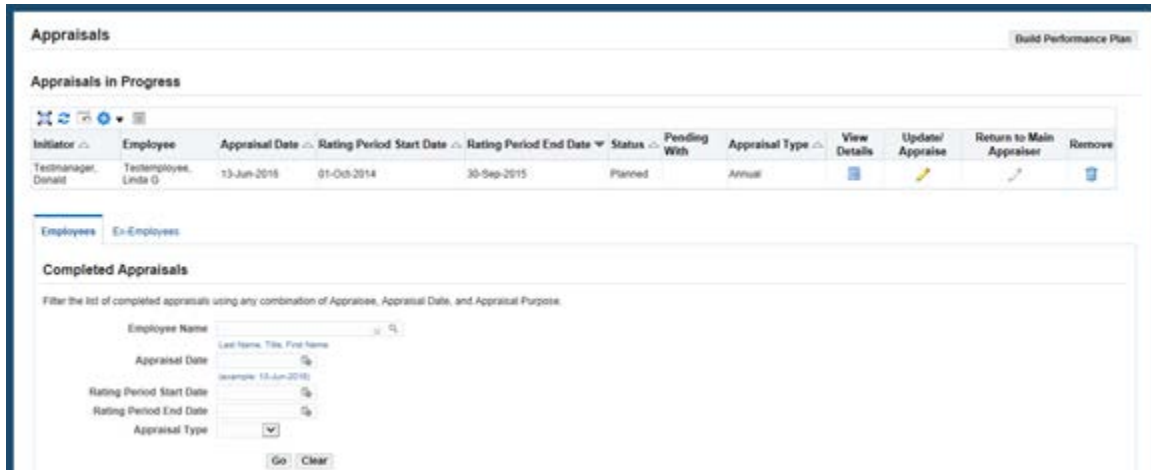


This will take you to the **Appraisals** screen, which is separated into two sections: **Appraisals in Progress** and **Completed Appraisals**. **Appraisals in Progress** gives you a list of Appraisals that you created in **Build Performance Plan**. These are the appraisals we will be working with, in this user guide.







Completing the Appraisal

To begin the process of completing the appraisal, select the **Update/Appraise** icon , in the row of the respective employee.




The screenshot displays the 'Appraisals' management interface. At the top right, there is a 'Build Performance Plan' button. The main section is titled 'Appraisals in Progress' and contains a table with the following data:

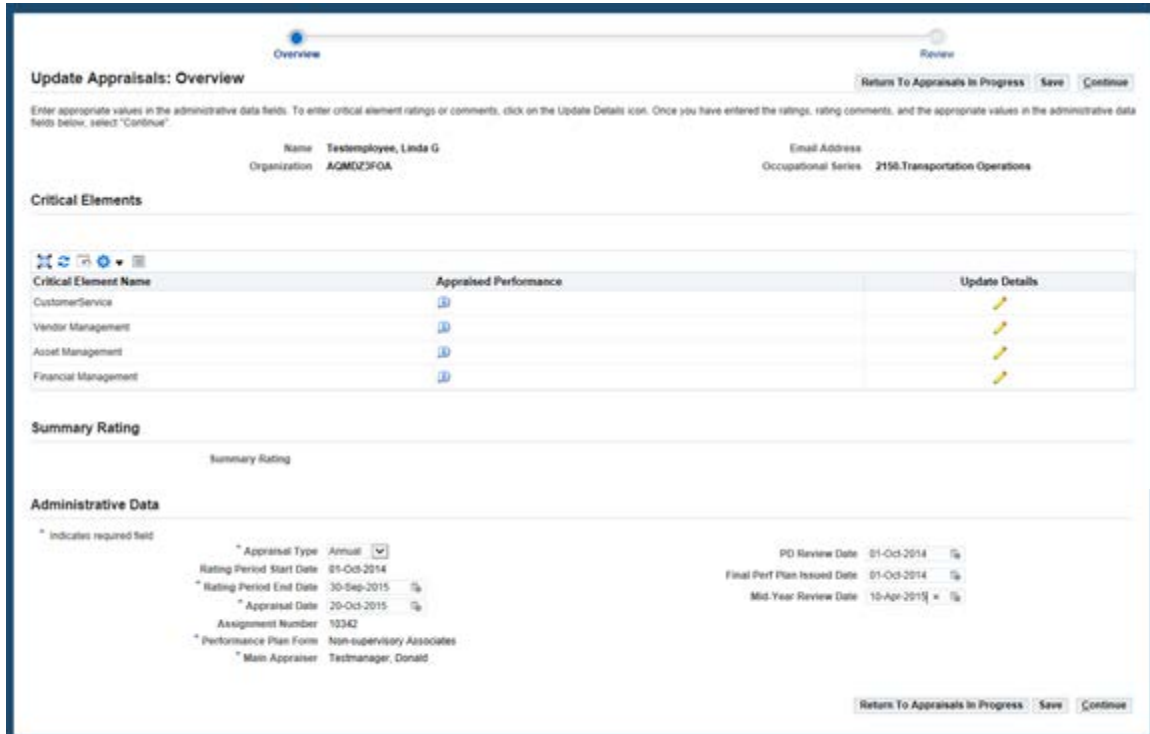
Initiator	Employee	Appraisal Date	Rating Period Start Date	Rating Period End Date	Status	Pending With	Appraisal Type	View Details	Update/Appraise	Return to Main Appraiser	Remove
Techmanager, Donald	Techemployee, Linda G	13-Jun-2015	01-Oct-2014	30-Sep-2015	Planned		Annual				

Below the table, there are tabs for 'Employees' and 'E-Employees'. The 'Completed Appraisals' section is currently active, showing a filter interface with the following fields:

- Employee Name:
- Appraisal Date:
- Rating Period Start Date:
- Rating Period End Date:
- Appraisal Type:

At the bottom of the filter section, there are 'Go' and 'Clear' buttons.

The **Update Appraisals: Overview** screen allows the user to modify the **Appraisal Type, Rating Period End Date, Appraisal Date, PD Review Date, Final Performance Plan Issued Date, and Mid-Year Review Date**. Once these dates are confirmed as accurate, select the **Save** button. Next, begin the rating process by selecting the **Update Details** icon , in the row of the 1st critical element.







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: TestEmployee, Linda G
 Organization: AQMZ3FOA
 Email Address:
 Occupational Series: 2150.Transportation Operations

Critical Elements

Critical Element Name	Appraised Performance	Update Details
CustomerService	3	
Vendor Management	3	
Asset Management	3	
Financial Management	3	

Summary Rating

Summary Rating

Administrative Data

* Indicates required field

Appraisal Type: Annual
 Rating Period Start Date: 01-Oct-2014
 Rating Period End Date: 30-Sep-2015
 Appraisal Date: 20-Oct-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

Return To Appraisals In Progress Save Continue

Select a rating level, and include your comments for the employee's performance, in regard to the critical element. You may type these comments directly into the field, or copy and paste them from a Word document. Once this is complete, select the **Save and Update Next** button, to rate the next critical element.

Important: The **Appraiser Comments** field will accept the first 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

The screenshot shows the 'Update Critical Elements' form for the 'Customer/Service' critical element. The form includes a progress bar at the top with 'Overview' and 'Review' tabs. Below the progress bar are buttons for 'Back', 'Save and Update Next', and 'Save'. A message instructs the user to enter a rating and comments, then click 'Save and Update Next'. The form fields are: 'Critical Element: Customer/Service', 'Start Date: 01-Oct-2014', and 'Percentage: 25'. Under 'Rate On This Critical Element', there is a dropdown for 'Appraised Performance' with options 1-Level 1, 2-Level 2, 3-Level 3, 4-Level 4, and 5-Level 5. A text area for 'Appraiser Comments' is visible. To the right, a 'Details: Specific Measure' section lists 'Customer Interaction and Support', 'Customer Loyalty Score', and 'Communication with co-workers, management, vendors and customers'.

Continue the process of selecting a rating, typing in comments, and clicking the **Save and Update Next** button, until you reach the last critical element. Once you reach the last critical element, select the **Save** button, after including your rating and comments.

The screenshot shows the 'Update Critical Elements' form for the 'Vendor Management' critical element. The form includes a progress bar at the top with 'Overview' and 'Review' tabs. Below the progress bar are buttons for 'Back', 'Save and Update Next', and 'Save'. A message instructs the user to enter a rating and comments, then click 'Save and Update Next'. The form fields are: 'Critical Element: Vendor Management', 'Start Date: 01-Oct-2014', and 'Percentage: 25'. Under 'Rate On This Critical Element', there is a dropdown for 'Appraised Performance' with options 1-Level 1, 2-Level 2, 3-Level 3, 4-Level 4, and 5-Level 5. A text area for 'Appraiser Comments' is visible. To the right, a 'Details: Specific Measure' section lists 'Vendor Interaction and Support'.

Now that a rating has been issued for all of the critical elements, you have the opportunity to review the ratings that you have issued, as well as make any last changes to the appraisal dates. Once confirmed as accurate, select the **Continue** button.

Overview
Review

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

Critical Elements

Critical Element Name	Appraised Performance	Update Details
Customer/Service	4-Level 4	
Vendor Management	4-Level 4	
Asset Management	4-Level 4	
Financial Management	4-Level 4	

Summary Rating

Summary Rating: 4-Level 4

Administrative Data

* Indicates required field

* Appraisal Type: Annual
 Rating Period Start Date: 01-Oct-2014 PD Review Date: 01-Oct-2014
 Rating Period End Date: 30-Sep-2015 Final Perf Plan Issued Date: 01-Oct-2014
 * Appraisal Date: 20-Oct-2015 Mid-Year Review Date: 10-Apr-2015
 Assignment Number: 10342
 * Performance Plan Form: Non-supervisory Associates
 * Main Appraiser: Testmanager, Donald

Return To Appraisals In Progress Save Continue

The **Update Appraisals: Review** screen allows you to review the appraisal data, in a non-editable format. If you must make any revisions, select the **Back** button. Otherwise, select the **Continue** button.

Overview
Review

Update Appraisals: Review Cancel Preview Continue Back

To make changes to the appraisal, click Back.

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

Administrative Data

Initiator: Testmanager, Donald Main Appraiser: Testmanager, Donald
 Appraisal Type: Annual Appraisal Date: 20-Oct-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

Details Critical Element Name	Appraised Performance
Customer/Service	4-Level 4
Vendor Management	4-Level 4
Asset Management	4-Level 4
Financial Management	4-Level 4

If you must change the main appraiser for the appraisal, select the **Change Main Appraiser** button. Otherwise, select the **Summary Ratings and Comments** button.

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
Organization: AQMD23FOA
Email Address:
Occupational Series: 2150.Transportation Operations

Administrative Data [Change Main Appraiser](#)

Initiator: Testmanager, Donald
Appraisal Type: Annual
Rating Period Start Date: 01-Oct-2014
Rating Period End Date: 30-Sep-2015
Performance Plan Form: Non-supervisory Associates
Main Appraiser: Testmanager, Donald
Appraisal Date: 20-Oct-2015
PD Review Date: 01-Oct-2014
Final Perf Plan Issued Date: 01-Oct-2014
Mid-Year Review Date: 10-Apr-2015

Critical Elements

Show All Details | Hide All Details

Details Critical Element Name	Appraised Performance
CustomerService	4-Level 4
Vendor Management	4-Level 4
Asset Management	4-Level 4
Financial Management	4-Level 4

The **Summary Ratings and Comments** screen allows you to include your **Summary Rating Overall Comments**, and **Development and Training Comments**. You may type these comments directly into the field, or copy and paste them from a Word document. Once completed, select the **Save and Continue** button.

Important: The **Summary Rating Overall Comments** and **Development and Training Comments** fields will each accept up to 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal 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
Organization: AQMD23FOA
Email Address:
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: 4-Level 4
Overall Comments: Linda continues to be a strong contributor to the team.

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: Linda has expressed interest in Project Management training. Together we will evaluate several available PM programs for the upcoming fiscal year.

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

Submitting the Appraisal

You are now viewing the **Final Review** screen. If you have not met with the employee, do not submit the appraisal. Rather, generate a PDF of the appraisal by selecting the **Printable Form** button, which you can share with the employee. Once the meeting has taken place and you are ready to submit, return back to this screen. If your rating is a level 1 or level 5, the appraisal will require a 2nd level of approval. You may use the **Comments to Approvers** field, and the attachment functionality, to offer support for the rating to the 2nd level approver. **Note:** the comments to the approver and the attached files will not stay with the appraisal, once the appraisal is submitted in CHRIS. They are used only in the approval process, as a means to include additional support for the 2nd level approver. Once the appraisal is confirmed as accurate, select the **Submit** button.

Summary Ratings and Comments >

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.

Name: TestEmployee, Linda G. Email Address:
 Organization: AGMDZSFOA Occupational Series: 2150:Transportation Operators

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: 4-Level 4
 Overall Comments: Linda continues to be a strong contributor to the team.

Development and Training

Comments
Linda has expressed interest in Project Management training. Together we will evaluate several available PM programs for the upcoming fiscal year.

Reviewing Officials

To remove a reviewing official from the list, click on the "Delete" icon. To add a reviewing official, click on "Add Reviewing Official" and then use the flashlight or enter a last name and hit your TAB key to search for the appropriate reviewing official.

Line No	Reviewing Official	Category	Delete
No Approvers			

» Add Reviewing Official

Comments to Approvers

Additional Information

Attachments

To help approvers understand the request, you can attach supporting documents, images, or links to this action.

None Add...

The **Warning** screen appears, notifying you that a level 1 or 5 will be submitted to a 2nd level approver, and a level 2, 3, or 4 will generate an email to the employee. If you are ready to submit the appraisal, select **Yes**.

Warning

As a GSA supervisor (excluding GSA OIG), and with the submission of this appraisal, you are confirming that the employee named on this appraisal has:

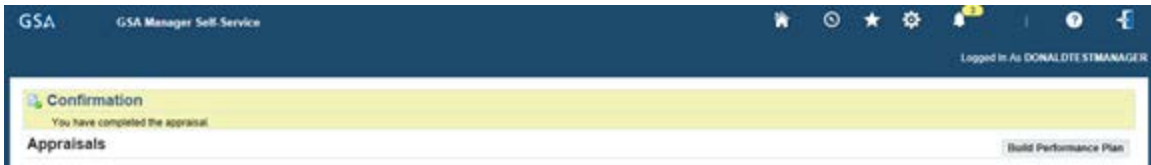
- An approved Individual Development Plan (IDP); and
- A signed Telework Agreement.

If this rating is a 1 or 5, submitting this appraisal will send it to the reviewing official. If it is a 2, 3, or 4, submitting this appraisal will complete the appraisal and will generate an email to the employee.

This certification is required in accordance with GSA's policies and procedures. Failure to adhere to the requirements of this certification may make the submitter subject to appropriate disciplinary action under GSA's Maintaining Discipline policy (9751.1 CPO).

You cannot update a completed appraisal. Do you want to continue?

The confirmation message appears, confirming that the appraisal has been completed, or submitted for approval. To continue completing appraisals, look for the next appraisal under **Appraisals in Progress**. If the appraisal has not been created, select the **Build Performance Plan** button, to be taken to **Manager Self-Service** ➔ **Build Performance Plans**.



New Features

New Features include:

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


Vertical Scroll

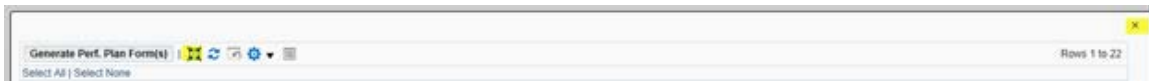
Scroll bar (1) on the far right side will allow you to view the entire screen.
 Scroll bar (2) located within the table allows you to view all the records.


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, Mia L.	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"/>		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"/>		Mevhirer, E. S.	Completed	Annual	01-Oct-2014	30-Sep-2015								
<input type="checkbox"/>	Testemployee, Mia L.	Mevhirer, E. S.	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								

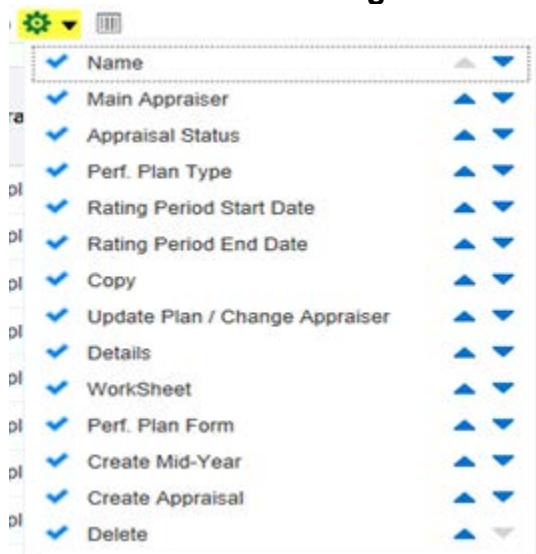
Click the Detach Table  icon again or the 'x' in the upper right hand corner to close the window





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