

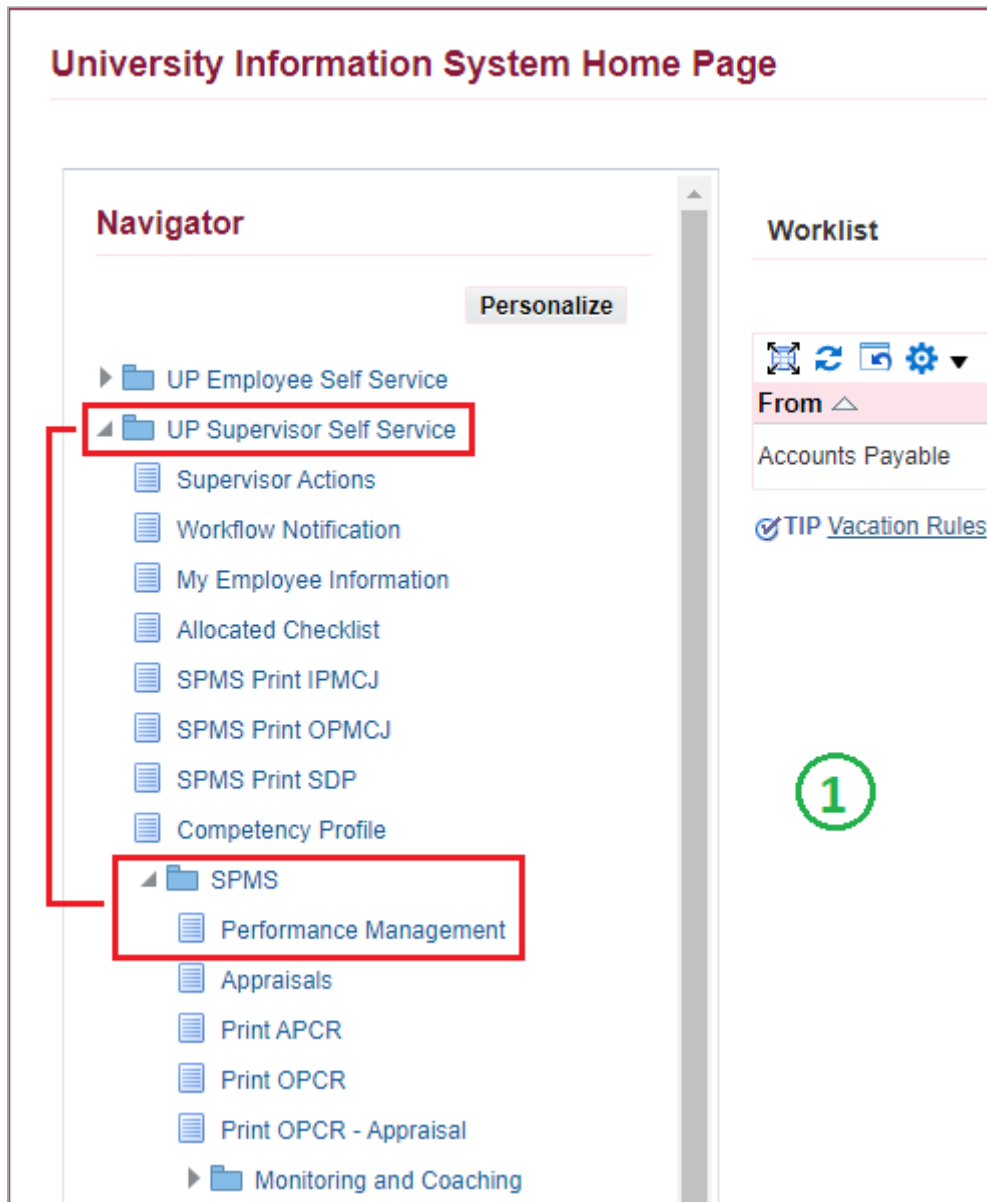


# SPMS-Appraisal Rating

QUICK GUIDE

# Navigator

Step 1: On the Navigator, go to **UP Supervisor Self Service > SPMS > Performance Management**.



# Appraisals

Step 2: Go to *Plan* and on Appraisal: Individual, **Go to Task**.

Performance Management Appraisals

On this page, you can access worker development functions and view performance management notification messages.

### Performance Management Task List

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Expand All | Collapse All

Focus Task	Start Date	End Date	Go to Task
My Plans			
SAMPLE PLAN 1 2022	01-Jan-2022	31-Jul-2022	
Cascade Tasks and Targets	01-Jan-2022	31-Jan-2022	
Transfer scorecards to employee for action	01-Jan-2022	31-Jan-2022	
Review employee changes	01-Jan-2022	31-Jan-2022	
View and Track tasks and targets progress	01-Jan-2022	31-Jul-2022	
Appraisals: Individual	14-Jun-2022	31-Jul-2022	

Step 3: Go to *Appraisal Scorecard* with Status: **Ongoing with Main Appraiser** and click **Review Appraisal**.

Performance Management Appraisals

Main Appraiser Participant

### Appraisals As Main Appraiser

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### Appraisals In Progress

You can download appraisals to complete them offline and upload the completed appraisals.

Indicates terminated employees. |

Appraisee	Appraisal Date	Status	Details	Review Appraisal	Delete
<input type="checkbox"/>	14-Jun-2022	Ongoing with Main Appraiser			

# Main Appraiser Review

Step 4: You can view the Scorecard of the Staff [here](#). Just click the **arrow** to view the details (Targets, Accomplishment, Ratings, etc.)

Step 5: Click **Give Final Ratings** if you are done checking the ratings and accomplishments.

### Main Appraiser Review

[Send Back to Appraisee](#) [Update Appraisal](#) [Give Final Ratings](#)

If there are any changes done in the Appraisal, kindly select **Update Appraisal**.  
If you want to send back the appraisal to the main appraiser after the changes done, select **Send back to Appraisee**.  
If you agree with the appraisal, proceed to selecting **Give Final Ratings**.

5

Employee Name	<input type="text"/>	Employee Number	<input type="text"/>
Organization Email Address	<input type="text"/>	Department	<input type="text"/>
Manager	<input type="text"/>	Job	<input type="text"/>
		Assignment Number	<input type="text"/>

### Setup Details

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Initiator	<input type="text"/>	Main Appraiser	<input type="text"/>
Period Start Date	01-Jan-2022	Appraisal Date	14-Jun-2022
Period End Date	31-Jul-2022		
Template	Individual		

[Change Main Appraiser](#)

### Objectives

Show All Details | Hide All Details

Details	Objective Name
<input type="checkbox"/>	SAMPLE FUNCTION 1
<input type="checkbox"/>	SAMPLE FUNCTION 2

# Give Final Ratings

Step 6: Scroll down and select **Overall Rating** (based on "Suggested Overall Rating")

Step 7: You may add comments [here](#), but it is **optional**.

Step 8: Click **Continue** to proceed.

Main Appraiser Review >

## Give Final Ratings: Main Appraiser

8

Cancel Continue

Employee Name  
Organization Email Address  
Manager

Employee Number  
Department  
Job

### Objective Ratings

Overall Rating and Comments

Overall Rating should be the same as Suggested Overall Rating. Enter the value and select Continue.

Suggested Overall Rating 5-Outstanding (4.51 and above)

\* Overall Rating 5-Outstanding (4.51 and above) 6

Change to Plain Text Mode

Overall Comments 7

Appraisee Feedback

8

Cancel Continue

# Submit and Confirm

Step 9: Click **Submit** to proceed.

Main Appraiser Review > Give Final Ratings: Main Appraiser >

## Give Final Ratings: Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name  
Organization Email Address  
Manager

Employee Number  
Department  
Job

Additional Information

### Attachments

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

None Add...

Cancel Back **Submit**

Step 10: Confirm **Yes**.

**Warning**

You have chosen to complete this appraisal.

You cannot update a completed appraisal. The application notifies the Appraisee and requests feedback. Do you want to continue?.

No **Yes**

# Pending Approval

Step 11: Status should be **Pending Approval** – *Staff/Appraisee* needs to approve the given final ratings.

Step 12: You can view [here](#) the list of Completed Appraisals under your supervision.

Performance Management | **Appraisals**

Main Appraiser | Participant

**Confirmation**  
You have submitted the appraisal for approval.

### Appraisals As Main Appraiser

#### Appraisals In Progress 11

You can download appraisals to complete them offline and upload the completed appraisals.

Indicates terminated employees. |

<input type="checkbox"/> Appraisee	Appraisal Date	Status	Details	Review Appraisal	Delete
<input type="checkbox"/>	14-Jun-2022	Pending Approval			

Current Workers | Terminated Workers

### Completed Appraisals

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Appraisee    
Last Name, Title, First Name

Appraisal Date

Rows 1 to 7

Appraisee	Appraisal Date	Period Start Date	Period End Date	Details	Print	Delete	Journal
<input type="checkbox"/>	01-Jan-2022	01-Jul-2021	31-Jan-2022				
	01-Jan-2022	01-Jul-2021	31-Jan-2022				