



# **SPMS-Appraisal Submission**

## **QUICK GUIDE**

# Navigator

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

The screenshot shows the 'University Information System Home Page' with a 'Navigator' sidebar on the left and a 'Worklist' on the right. The 'Navigator' sidebar contains a tree view of menu items. A red box highlights the 'UP Employee Self Service' folder, and another red box highlights the 'Performance Management' link under the 'SPMS' folder. A red line connects the two boxes. A green circle with the number '1' is positioned to the right of the 'Performance Management' link. The 'Worklist' section on the right contains a table with columns 'From' and 'Type', and a 'TIP Vacation Rules' link.

**University Information System Home Page**

**Navigator** Personalize

- UP Employee Self Service
- All Actions Awaiting Your Attention
- My Information
  - Employee Information
  - Publication, Research, Creative Work & Other Scholarly Work
  - Public Service
  - Employee Submissions/Requests
- SPMS
  - Performance Management**
  - Print IPCR
  - Print IPCR - Appraisal
  - SALN
  - Training and Development

**Worklist**

From	Type
SYSADMIN	HR
SYSADMIN	HR

TIP [Vacation Rules](#)

1

# Appraisals

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

Performance Management Appraisals

On this page, you can access your development functions and view Performance management notification messages. 2

### Performance Management Task List

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	
Set Tasks and Targets	01-Jan-2022	31-Jan-2022	
View Submitted Tasks and Targets	01-Jan-2022	31-Jul-2022	
Appraisal: Individual	14-Jun-2022	31-Jul-2022	

Step 3: Go to *Appraisal Scorecard* with Status: **Planned** and click **Rate My Performance**.

Performance Management Appraisals

My Appraisals 3

### My Appraisals

Appraisals of

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

Initiator	Appraisal Date	Main Appraiser	Status	Details	Rate My Performance
<input type="checkbox"/>	14-Jun-2022	<input type="text"/>	Planned		

# Overview and Review

Step 4: Enter **Actual Accomplishment**.

Step 5: Enter **Quality, Efficiency, Timeliness**.


Step 6: Click **Continue** to proceed.





**Update Standard Appraisal: Overview** Cancel Save as Draft Continue 6

Employee Name  Employee Number   
Organization Email Address  Department   
Manager  Job

**Tasks and Targets** 4 5

[View this link for QET Guide](#)  
By clicking the Trash Icon, the selected item will be removed permanently and will be no longer viewable.

[Add Tasks and Targets](#) [Copy Tasks and Targets](#) 

Measures (Metric)	Target	* Percent Distribution	* Actual Accomplishment	Quality	Efficiency	Timeliness	Update Details	Delete
SAMPLE MEASURES	SAMPLE TARGET	50 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
SAMPLE MEASURES 2	SAMPLE TARGET 2	50 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

Step 7: Click **Share with Main Appraiser**.

Objectives

**Update Standard Appraisal: Review** Cancel Back Share with Main Appraiser 7

Employee Name  Employee Number   
Organization Email Address  Department   
Manager  Job

To make changes to the appraisal, click Back.

**Setup Details**

Initiator  Main Appraiser   
Period Start Date 01-Jan-2022 Appraisal Date 14-Jun-2022  
Period End Date 31-Jul-2022 Next Appraisal Date  
Template Individual

# Submit

Step 8: Click **Submit**.

Appraisals: My Appraisals >

## Share Appraisal Details with Main Appraiser

Click Submit to transfer ownership of this appraisal to the main appraiser.

Notification Message for Main Appraiser

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Step 9: Status should be **Ongoing with Main Appraiser**.

Performance Management Appraisals

My Appraisals

**Confirmation**

Ownership of your appraisal has transferred to your main appraiser. You cannot update the appraisal again until the main appraiser returns ownership of the appraisal to you and requests your input.

### My Appraisals

Appraisals of

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

Initiator	Appraisal Date	Main Appraiser	Status	Details	Rate My Performance
<input type="text"/>	14-Jun-2022	<input type="text"/>	Ongoing with Main Appraiser	<input type="button" value="Details"/>	<input type="button" value="Rate My Performance"/>