University of the Philippines System
**Performance Management System –
Office Performance Evaluation System
(UPS PMS-OPES)**

INSTRUCTIONS

On Performance Targets, Tagging and Monitoring and Performance Rating

Office of the Vice President for Administration
2011

Instructions on Performance Targets, Tagging and Monitoring and Performance Rating By: Angela D. Escoto, Michael P. Lagaya, Antonette L. Dungca, Arlene A. Samaniego

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General Procedure

University of the Philippines
Performance Management System –
Office Performance Evaluation System (UPS PMS-OPES)

INSTRUCTIONS
PERFORMANCE TARGETS, TAGGING AND MONITORING and PERFORMANCE RATING

General Procedure:

I. Determine Target Points

1. For Individual Performance Target

A	Total Number of Days in a Year	365
B	Less: Holidays, Saturdays, Sundays & Mandatory Leaves (5 days), Special Leaves	125
C	**TOTAL WORKING DAYS/YEAR= (A - B)**	**240**
D	Working Hours in a Day	8
E	**TOTAL WORKING HOURS/YEAR=(C x D)**	**1,920**
F	Less: NON-QUANTIFIABLE OUTPUT (1,920 x ___%*)	xxx
G	**TOTAL QUANTIFIABLE Target Points per Year = E - F**	**xxxx**
H	**TOTAL QUANTIFIABLE Target Hours per Rating Period = G ÷ 2**	**xxxx**

For service units, standard ratio of quantifiable to non-quantifiable is 70:30; justification from Unit PERC is needed if NQ is set more than 30%

2. For Supervisor Performance Target

- Determine percentages to be assigned for the following categories: **Supervisory, Non-Supervisory (Quantifiable) and Non-Supervisory (Non-Quantifiable)** Outputs**:**

A	Total Number of Days in a Year	365
B	Less: Holidays, Saturdays, Sundays & Mandatory Leaves (5 days), Special Leaves	125
C	**TOTAL WORKING DAYS/YEAR = (A - B)**	**240**
D	Working Hours in a Day	8
E	**TOTAL WORKING HOURS/YEAR = (C x D)**	**1,920**
F	Less: Supervisory (1,920 x ____%*)	xxx
G	Less: NON-QUANTIFIABLE OUTPUT (1,920 x ____%*)	xxx
H	**TOTAL NON-SUPERVISORY QUANTIFIABLE Target Points per Year = E – (F+G)**	xxx
I	**TOTAL NON-SUPERVISORY QUANTIFIABLE Target Points per Rating Period = H ÷ 2**	xxx

As agreed upon between rater and ratee

- **Supervisory, Non-Supervisory (Quantifiable) and Non-Supervisory (Non-Quantifiable) Functions are defined as follows:**

Supervisory Function refers to the task of overseeing the performance of subordinates which includes *planning, monitoring, organizing, and directing.*

Non-Supervisory, Quantifiable Functions refer to tasks that are not supervisory in nature and are usually found in the OPES Reference Table

Non-Supervisory, Non-Quantifiable functions refer to tasks that are not supervisory in nature with outputs that are not measurable and verifiable (e.g. attendance to meetings, programs/ceremonies; answering phone calls, and attending to clients' queries)

- **Computation of Target Points of the Supervisor for Smallest Unit (Section/Division)**

Section

Staff	Total Individual Target Points per Rating Period
Staff 1	xxxx
Staff 2	xxxx
…….	xxxx
…….	xxxx
Non-Supervisory Quantifiable (Supervisor of Section)	xxxx
TOTAL Section Target Points	**xxxx**

Division

Unit	Total Smallest Unit Target Points per Rating Period
Smallest Unit 1	xxxx
Smallest Unit 2	xxxx
…….	xxxx
…….	xxxx
Non-Supervisory Quantifiable (Supervisor of Division)	xxxx
TOTAL Division Target Points per Rating Period	**xxxx**

3. For Overall Unit (Office/College) Performance Target

- Take the sum of all section/division target points. This becomes the Office Performance Target.

II. ACCOMPLISH OPES-BASED PT FORMS

1. INDIVIDUAL PERFORMANCE TARGETS *(UPS PMS-OPES Form No. 1)*

- Identify tasks to be assigned to the employee concerned; quantifiable tasks may be lifted from the appropriate calibrated OPES Reference Tables; non-quantifiable tasks may be listed including the percentage of each task in accordance with individual functions.
- Write the quantifiable tasks and their corresponding codes on Part I of the OPES Form for Individual Employee *(Annex A)*;
- Assign corresponding % for each quantifiable task that will sum up to 100%.
- Based on the defined target points, compute the corresponding target outputs (quantity) using any of the following options:

    Option A – use of historical data (please see Annex B for details)
    Option B – use of agreed-upon percentages by assigning corresponding % for each quantifiable task that will sum up to 100% (please see Annex C for details)

2. SUPERVISOR PERFORMANCE TARGETS *(UPS PMS-OPES Form No. 2)*

- Set %s for each duty (i.e. supervisory, non-supervisory non-quantifiable). Rater and ratee should discuss, establish and mutually agree on these percentages;

4

- Under Supervisory Functions, list down the names of the staff and their corresponding Planned Target Points for the rating period;
- Under the Non-Supervisory Quantifiable Functions, follow the method for setting individual performance targets;
- List down the non-supervisory non-quantifiable tasks and corresponding percentages.

III. TAG and MONITOR INDIVIDUAL OUTPUTS

- Option 1 – Manual; suggested forms for individual and supervisor *(Annex E)*
- Option 2 – Computerized using PROGRAM (Visual FoxPro) developed by Mr. Michael Lagaya, HRDO Chief, UP Open University *(Annex F)*

IV. EVALUATE PERFORMANCE RATING

A. For Individual Performance Rating *(UPS PMS-OPES Form No. 1)*

1. At the end of the rating period, the ratee should **total the number of actual output per task (column G)**. The supervisor should be able to verify the actual outputs per task using the manual or electronic tagging.
2. Multiply the actual output per task (G) with the equivalent OPES point (**D**) to get the **actual points per task**, (**I**)

$$I = G \times D$$

3. Compute the **total actual points** by adding all entries in **column I, ($\sum$ I)**.
4. Compute the **% Accomplishment (K)** using the following formula:

$$K = \frac{\text{Total Actual Points, } (\sum \mathbf{I})}{\text{Total Planned Points } (\sum \mathbf{H})} \times 100$$

B. For Supervisor Performance Rating *(UPS PMS-OPES Form No. 2)*

The supervisor's performance will be based on the following:
(a) Supervisory Functions; (b) Non-Supervisory Quantifiable
Functions; and (c) Non-Quantifiable Output.

1. Supervisory Functions
   a. At the end of the rating period, the supervisor should write
   down the total output of each of his/her staff in **column (I).**
   b. Compute the **total actual supervisory points** by adding all
   entries in **column (I).**
   c. Compute the **% Accomplishment (K)** using the following
   formula:

$$K = \frac{\text{Total Actual Points, } (\sum \text{I}) \text{ under Supervisory Functions}}{\text{Total Planned Points, } (\sum \text{H}) \text{ under Supervisory Functions}} \times 100$$

2. For the Non-Supervisory Quantifiable Output/Tasks

   a. The ratee should total the **number of actual output per task
   (column G)**. The supervisor/head of unit should be able to
   verify the actual outputs per task using the manual or
   electronic tagging.

   b. Multiply the actual output per task (**G**) with the equivalent
   OPES point (**D**) to get the **actual points per task**, (**I**)
   $$\mathbf{I} = G \times D$$

c. Compute the **Total Actual Non-Supervisory Quantifiable Points (L)** by adding all entries in **column I, $\sum$ I** under **Non-Supervisory Quantifiable Functions**.

d. Compute the **% Accomplishment (M)** using the following formula:

$$M = \frac{\text{Total Actual Points, } (\sum I) \text{ under Non-Supervisory Functions}}{\text{Total Planned Points, } (\sum H) \text{ under Non-Supervisory Functions}} \times 100$$

3. **Compute the Overall % Accomplishment (N) of the supervisor using the following formula:**

OVERALL % Accomplishment (N) =

$$\left\{ \begin{array}{l} \text{\% Accomplishment} \\ \text{(Supervisory) (K)} \end{array} \quad X \quad \frac{\text{\% Supervisory Functions}}{\begin{array}{c}\text{Sum of \%s assigned to Supervisory and Non-Supervisory}\\\text{Quantifiable Functions}\end{array}} \right\}$$

+

$$\left\{ \begin{array}{l} \text{\% Accomplishment} \\ \text{(Non-supervisory) (M)} \end{array} \quad X \quad \frac{\text{\% Non- Supervisory Functions}}{\begin{array}{c}\text{Sum of \%s assigned to Supervisory and Non-Supervisory}\\\text{Quantifiable Functions}\end{array}} \right\}$$

Please note that the over-all performance of the supervisor/head of section/division/unit will be the over-all performance of the section or division or unit.

For the Critical Factors (Part II)

1. Score each critical factor from 1 to 4, 4 being the highest. One column will be accomplished by the ratee, and one column will be accomplished by the rater (supervisor).

2. Add the ratings per column.

3. **Compute for A** using the formula:

$$A = \frac{\text{Total score}}{32 \text{ or } 36, \text{ whichever is applicable}} \times 40\%$$

4. **Compute for B** using the formula:

$$B = \frac{\text{Total score}}{32 \text{ or } 36, \text{ whichever is applicable}} \times 60\%$$

5. **Compute for C** by adding A & B. This becomes Score in Part II

6. Compute the **Overall Point Score**:
   - i. Part I = Score in Part I x 70%
   - ii. Part II = Score in Part II x 30%
   - iii. Add Part I & II to get the over-all score.

7. Add the **Intervening Task** (if any), using the following formula. Please note that the intervening tasks will have maximum of 12.5%.

$$\frac{12.5\%}{176 \text{ hrs}} = \frac{X}{\text{no. of hours rendered for the intervening tasks}}$$

8. Compute the **Total Numerical Rating** by adding the over-all point score and the intervening points.

9. Determine the **Equivalent Adjectival Rating** using the following scale:

Total Numerical Rating	Adjectival Rating
0	Poor
1-below 90	Unsatisfactory
90 – below 110	Satisfactory
110 – below 130	Very Satisfactory
130 above	Outstanding

Reminder: *Please note that the areas for improvement, if any, should be indicated in the form and properly discussed with the employee. The form should be signed by the ratee and the rater. The date of signing should be indicated.*

C. Office Performance/ Accomplishment
- Sum up all section/division total actual points;
- Sum up all section/division total planned points;

$$\textbf{Office \% Accomplishment} = \frac{\text{Sum up all Section/Division Total Actual Points}}{\text{Sum up all Section/Division Total Planned Points}} \times 100$$

NOTE: DO NOT ROUND OFF QUOTIENT/PRODUCT. JUST DROP THE NUMBER/S BEYOND THE 3ʳᵈ DECIMAL PLACE

EXAMPLE A :   (INDIVIDUAL)
MORE THAN 110% accomplishment

PART I (70%):

Total planned points ($\sum$H)	=	672 points (at 70Q:30NQ)
Total actual points ($\sum$I)	=	780 points
% Accomplishment (K)	**=**	**780/672 x 100**
	=	**116.071%**

PART II (30%):

Total points (A)   =   30
Total points (B)   =   29

Compute for A   =   30
$$\frac{30}{32} \times 40\% = 37.500\%$$

Compute for B   =   29
$$\frac{29}{32} \times 60\% = 54.375\%$$

Compute for C   =   91.875%

Part I =   116.071% x 70%   =   81.249%
Part II=   91.875% x 30%   =   27.562%

OVERALL POINT SCORE   =   108.811%

Add: Intervening tasks, 150 hours

$$\frac{12.5\%}{176\ hrs} = \frac{X}{150\ hrs}$$

X   =   10.653%

TOTAL NUMERICAL RATING   =   119.463%
ADJECTIVAL RATING   =   VERY SATISFACTORY

EXAMPLE B : (INDIVIDUAL)
LESS THAN 100% accomplishment

Part I (70%):

Total planned points ($\sum$**H**)   =   672 points (at 70Q:30NQ)
Total actual points ($\sum$**I**)   =   612 points
% Accomplishment (K)   =   **612/672 x 100**
                                                             =   **91.071%**

Part II (30%):

Total points (A)   =   30
Total points (B)   =   29

Compute for A   =   30
                                              ----- x 40% = 37.500%
                                              32

Compute for B   =   29
                                              ----- x 60% =   54.375%
                                              32

Compute for C   =   91.875%

Part I =   91.071% x 70% =   63.749%
Part II=   91.875% x 30% =   27.562%

OVERALL POINT SCORE   =   **91.311%**
Add: Intervening tasks, 150 hrs.

$$\frac{12.5\%}{176 \text{ hrs}} = \frac{X}{150 \text{ hrs.}}$$

X   =   10.653%

TOTAL NUMERICAL RATING   =   **101.964%**
ADJECTIVAL RATING   =   **SATISFACTORY**

EXAMPLE C (SUPERVISOR):

Part I (70%):

A. Supervisory Functions (50%):

Staff (b)	Planned (h)	Actual (i)
Staff 1	462	526
Staff 2	500	625
Staff 4	680	685
Staff 5	565	425
Total Points	**2,207**	**2,261**
% Accomplishment (K)	**2,261/2,207 x 100 = 102.446%**	

B. Non-Supervisory Functions (20%)

Total planned points (**L**) = 192 points
Total actual points (**L**) = 212 points
% Accomplishment (M) = **212/192 x 100**
= **110.416%**

C. Overall Accomplishment of the Supervisor (N) =

% Accomplishment (Supervisory) (K) X $\dfrac{\text{\% Supervisory Functions}}{\text{Sum of \%s assigned to Supervisory and Non-Supervisory Quantifiable Functions}}$

+

% Accomplishment (Non-supervisory) (M) X $\dfrac{\text{\% of Non-Supervisory Functions}}{\text{Sum of \%s assigned to Supervisory and Non-Supervisory Quantifiable Functions}}$

$$N = \left\{ 102.446 \times \frac{50\%}{70\%} \right\} + \left\{ 110.416 \times \frac{20\%}{70\%} \right\}$$

= 73.175% + 31.547%

N = 104.723%

Part II (30%):

Total points (A)	=	34	
Total points (B)	=	32	

Compute for A = $\dfrac{34}{36}$ x 40% = 37.777%

Compute for B = $\dfrac{32}{36}$ x 60% = 53.333%

Compute for C = 91.110%

Part I = 104.723% x 70% = 73.306%

Part II = 91.110% x 30% = 27.033%

OVERALL POINT SCORE = **100.339%**

Add: Intervening tasks, 150 hrs

$$\dfrac{12.5\%}{176 \text{ hrs}} = \dfrac{X}{150 \text{ hrs.}}$$

X = **10.653%**

TOTAL NUMERICAL RATING = **110.992%**
(Over-all Point Score + Intervening Tasks)

ADJECTIVAL RATING = **VERY SATISFACTORY**

University of the Philippines System
PERFORMANCE MANAGEMENT SYSTEM
OFFICE PERFORMANCE EVALUATION SYSTEM (UPS PMS-OPES)
Rating Period: January-June CY 2010

Name :								
JUAN DE LA CRUZ				Unit/Office/Dept.: **Administrative Section**			Position: **Administrative Aide VI**	

Code (A)	Part I. Duties and Responsibilities (B)	% (C)	Point/s (OPES Ref. Table) (D)	Performance Indicator (E)	Output (Qty) Planned (F)	Output (Qty) Actual (G)	Points (Hrs) Planned (H)	Points (Hrs) Actual (I)
Quantifiable Functions: _____%								
GAF-001	To prepare disbursement voucher (DV) and Obligation Request (ObR) for payment of office supplies, equipment, and other bills/expenses.	30	0.500	Number of DV and ObR				
GAF-034	To screen and initial documents prior to unit head's signature.	15	0.033	Number of document				
GAF-036	To attach bar code to DVs and encodes in database.	15	0.083	Number of of DV				
GAF-048	To schedule/calendar/remind meetings/appointments.	10	0.500	Number of meeting/appointment				
GAF-055	To prepare pouch transmittal slips for documents to be sent to other offices.	10	0.500	Number of pouch forwarded to pertinent offices				
GAF-078	To check DTR of employees.	10	0.500	Number of employee				
GAF-111	To inspect, accept, and label with Inventory Sticker the newly acquired furniture and equipment.	10	0.333	Number of label				
TOTAL POINTS (J)		**100%**						
% ACCOMPLISHMENT (K) = (Total Actual Points (∑I) ÷ Total Planned Points(∑H) x 100								
Non-Quantifiable Functions: _____%								
							%	

PERFORMANCE CONTRACT

I shall strive to deliver quality service in the performance of my task by achieving the HIGHEST possible work standard as established by the unit PERC and agreed upon with my supervisor.

Employee's Name/Signature	Supervisor's Name/Signature	Head of Unit/Office/Signature
_____	_____	_____
Date	Date	Date

PERFORMANCE RATING (TO BE SIGNED AT THE END OF THE RATING PERIOD)

Discussed with:

Employee's Name/Signature	Supervisor's Name/Signature	Head of Unit/Office/Signature
_____	_____	_____
Date	Date	Date

PART II. CRITICAL FACTORS - 30%	4	3	2	1	A SELF RATING	B SUPVR. RATING
1. Initiative	A self-starter with exceptional initiative.	Does work without waiting for directions.	Does regular work normally upon instruction.	Lacks initiative.		
2. Human Relations (Courtesy with co-workers/clients.)	Outstanding and a strong force for office morale.	Fits easily into the group.	Normally tactful and obliging.	Inclined to be quarrelsome; has difficulty in dealing with others.		
3. Attendance (Absences in excess of 7.5 days approved VL and mandatory leave within the rating period.)	0 absence	1-3 absences	4-6 absences	7 and above absences		
4. Punctuality	0 tardiness	1-5 tardiness	6-10 tardiness	11 and above tardiness		
5. Ethical Behavior	Maintains an unblemished reputation as a professional government employee	Reasonably respectable behavior, performance, conduct or achievement in the observance of norms of conduct.	Normally observes ethical standards.	Unacceptable ethical behavior.		
6. Commitment	Serves as role model for employees, spontaneously renders extra services beyond one's work requirements.	Renders extended services willingly upon instruction without expecting extra compensation or sacrificing personal comfort.	Ensures that work is finished on time.	Can hardly be counted on to finish assigned tasks.		
7. Judgment	Exercises excellent judgment at all times.	Demonstrates better judgment most of the time.	Manifests acceptable judgment.	Cannot think by himself; lacks confidence; decisions are sometimes unsound.		
8. Stress Tolerance	Always calm and composed even when under pressure.	Calm most of the time; confident and positive.	Normally calm, confident and positive.	Cannot handle stress; highly emotional; often loses self control.		
9. Leadership (For supervisors only)	Leads staff exceptionally well.	Leads staff effectively.	Provides acceptable leadership.	Seldom exercises leadership over staff.		
SUB-TOTAL SCORE					-	-
TOTAL SCORE (C)						

WEIGHT   **EQ. PT. SCORE**

Part I   _____ x 70%   = _____

Part II   _____ x 30%   = _____

OVERALL POINT SCORE   - _____

ADD: INTERVENING TARGET, IF ANY - _____

TOTAL NUMERICAL RATING   - _____

EQUIVALENT ADJECTIVAL RATING   - _____

INSTRUCTIONS: Do not leave any unfilled portion.

Total Score

Compute for A = -- x 40

(32 or 36 whichever is applicable)

Total Score

Compute for B = -- x 60

(32 or 36 whichever is applicable)

Compute for C : Suma of A and B

AREAS FOR IMPROVEMENT: _____

The above rating has been discussed with me by my immediate supervisor on _____. Areas for improvement have been mutually agreed upon and I fully commit myself to achieve these objectives.

CONFIRMED   ATTESTED BY:

_____   _____   _____

RATEE   SUPERVISOR   HEAD OF UNIT

_____   _____   _____

Date   Date   Date

STEP 1

From the performance targets listed in your old PES Form, identify and lift equivalent/specific FUNCTIONS/*Duties and Responsibilities* (**B**) in the OPES Reference Table

STEP 2

Enter the CODE (**A**) as listed in the OPES Reference Table under the specified column.

STEP 3

Enter POINTS (**D**) and the PERFORMANCE INDICATOR (**E**) for each output as listed in the OPES Reference Table.

STEP 4

Using historical record, reflect the quantity of PLANNED OUTPUT (**F**) per task

STEP 5

Compute the corresponding **Planned Points** per task using the formula:

*Planned Point Per Task (**H**) = PLANNED OUTPUT per task (**F**) x OPES Reference Table Points (**D**)*

STEP 6

Compute the **TOTAL POINTS** (**J**) using the formula:

TOTAL POINTS (**J**) = Sum of all *Planned Points per task*

STEP 7

Compute the **PERCENTAGE DISTRIBUTION per task** (**C**) using the formula:

PERCENTAGE DISTRIBUTION per task (C) =
PLANNED POINTS per task (**H**) ÷ TOTAL PLANNED POINTS (**J**) x 100

STEP 1

From the performance targets listed in your old PES Form, identify and lift equivalent/specific FUNCTIONS/*Duties and Responsibilities* (**B**) in the OPES Reference Table

STEP 2

Enter the CODE (**A**) as listed in the OPES Reference Table under the specified column.

STEP 3

Enter POINTS (**D**) and the PERFORMANCE INDICATOR (**E**) for each output as listed in the OPES Reference Table.

STEP 4

Assign PERCENTAGE (%) DISTRIBUTION (**C**) for each function. Rater and ratee must agree on the assigned percentages per task.

STEP 5

Compute the PLANNED POINTS for each task using the formula:

*PLANNED POINTS (**H**) = % DISTRIBUTION (**C**) x Total target points for the rating period (**J**)*

STEP 6

Compute the PLANNED OUTPUT (Quantity) (**F**) for each task using the formula:

*PLANNED OUTPUT (**F**) = PLANNED POINT (**H**) ÷ OPES POINT (**D**)*

Note: The sum of the resulting planned target points from all tasks specified must equal the TARGET POINTS per rating period computed from Part I.

University of the Philippines System
PERFORMANCE EVALUATION SYSTEM FOR SUPERVISORS
Rating Period: **January - June** CY **2010**

Name : **PEDRO MAKABAYAN**		Position : **Supervising Administrative Officer**		Unit/Office/Dept.: **Administrative Section**			

Code (A)	Part I. Duties and Responsibilities (B)	% (C)	Point/s (OPES Ref. Table) (D)	Performance Indicator (E)	Output (Qty)		Points(Hrs)	
					Planned (F)	Actual (G)	Planned (H)	Actual (I)
Supervisory Functions (List of Staff): 50 %								
	Staff 1							
	Staff 2							
	Staff 3							
	Staff 4							
	Staff 5							
TOTAL POINTS (J)								
% ACCOMPLISHMENT (K) =Total Actual Points (∑I) ÷ Total Planned Points (∑H) x 100								
Non-Supervisory Quantifiable Functions: *20%*								
	Task 1							
	Task 2							
	Task 3							
TOTAL POINTS (L)								
% ACCOMPLISHMENT (M) = Total Actual Points (∑I) ÷ Total Planned Points (∑H) x 100								
OVER ALL % ACCOMPLISHMENT(N)= [(K x % Supervisory÷70) + (M x % Non-Supervisory÷70)]								
Non-Quantifiable Functions: 30%								
	NQ Task 1							
	NQ Task 2							
	NQ Task 3							

PERFORMANCE CONTRACT

I shall strive to deliver quality service in the performance of my task by achieving the HIGHEST possible work standard as established by the unit PERC and as agreed upon with my supervisor.

_____	_____	_____
Employee's Name/Signature	Supervisor's Name/Signature	Unit Head's Name/ Signature
_____	_____	_____
Date	Date	Date

PERFORMANCE RATING (TO BE SIGNED AT THE END OF THE RATING PERIOD)

Discussed with

_____	_____	_____
Employee's Name/Signature	Supervisor's Name/Signature	Unit Head's Name/Signature
_____	_____	_____
Date	Date	Date

UPS PMS-OPES									
INDIVIDUAL WEEKLY MONITORING SHEET									
DATE	**ACTIVITIES**								
	Task 1	**Task 2**	**Task 3**	**Task 4**	**Task 5**	**Task 6**	**Task 7**	**Task 8**	**Task 9**
MONDAY									
TUESDAY									
WEDNESDAY									
THURSDAY									
FRIDAY									

Section/Unit: _____

Period Covered: _____

Employee's Name: _____

Position/Designation: _____
Supervisor's Name and Signature/Date: _____

STAFF	UPS PMS-OPES SUPERVISOR'S MONITORING SHEET ACTIVITIES								
	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7	Task 8	Task 9
Staff 1									
Staff 2									
Staff 3									
Staff 4									
Staff 5									
Staff 6									
Staff 7									
Staff 8									
Staff 9									
Staff 10									
Staff 11									
Staff 12									

Section/Unit : _____

Period Covered *(e.g. March 1-15, 2010)***: _____**

Supervisor's Name: _____

Position/Designation : _____

Supervisor's Signature/Date : _____

PERFORMANCE MANAGEMENT SYSTEM –
OFFICE PERFORMANCE EVALUATION SYSTEM (PMS-OPES)
eLOGBOOK

Description of the Program

- The program runs with Visual Foxpro version 9.0. You need to install the said software to run the program.

Installation Procedures

1. Create a separate folder for the data of the OPESLOGBOOK (file name : **OPESLOGBOOK**) in drive C or D of your PC.
2. Copy the program to the folder.
3. Create a shortcut icon of Visual Foxpro in your desktop by clicking the right button of your mouse, go to **NEW** then **SHORTCUT**.
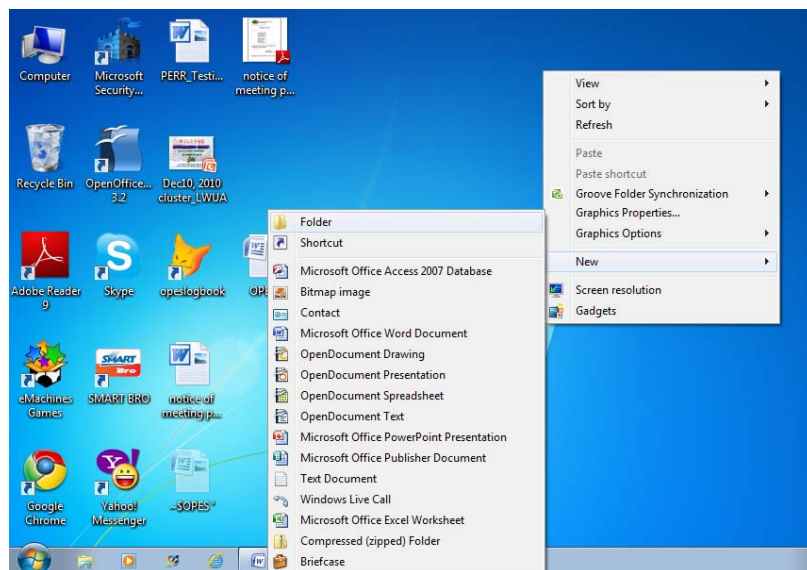
4. Locate vfp9.exe in Program files/Microsoft Visual Foxpro 9 folder. Click **OK** afterwards.
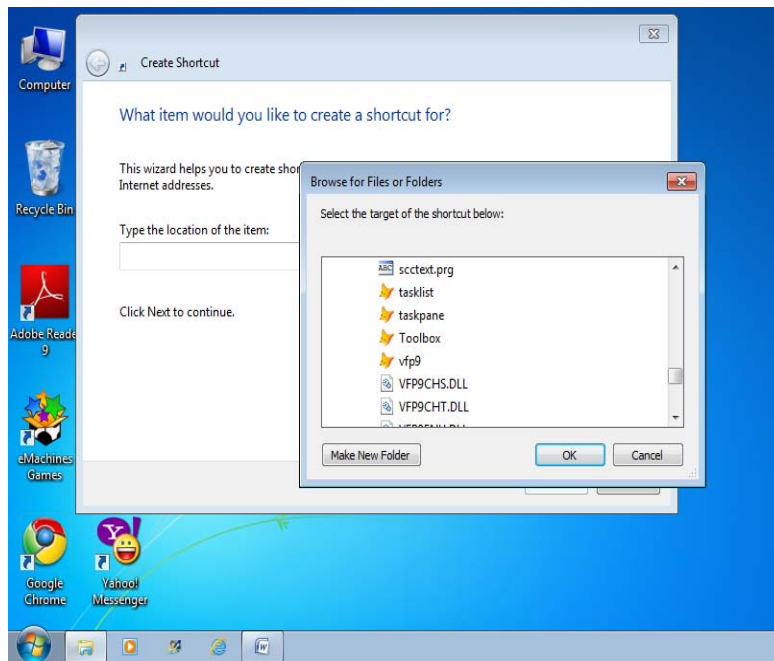
5. **RENAME** the shortcut icon to **OPES Logbook.**
6. Right click the **OPES LOGBOOK** icon and go to
   PROPERTIES. Change the content of the **TARGET** box
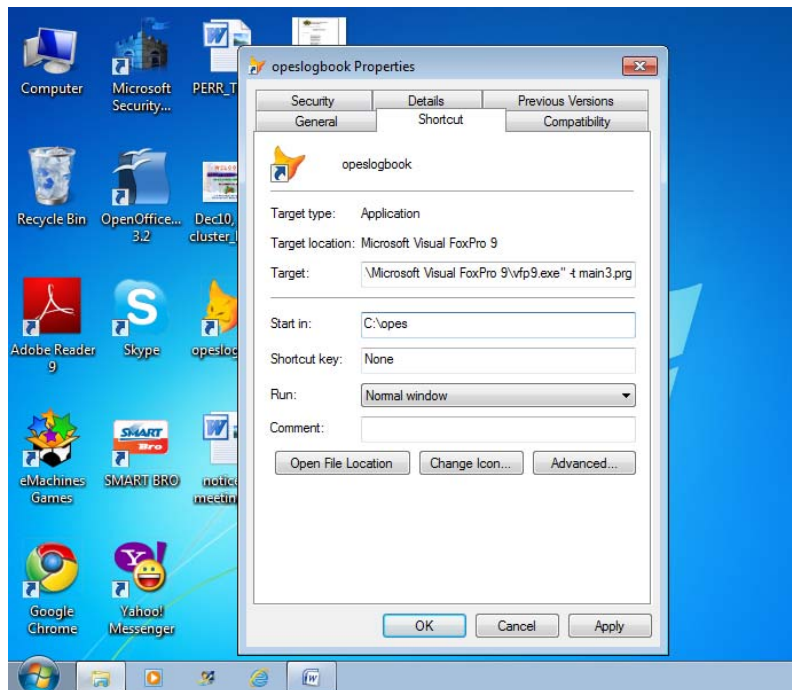
   to "C:\Program Files\Microsoft Visual FoxPro 9\vfp9.exe"
   -t main3.prg and **START IN** Box to c:\ or d:\opes.
7. Click **APPLY**.

Now, you are ready to use the program.

MAIN MENU

1. Double click the shortcut icon (**OPESLOGBOOK)** that you have created and the **MAIN MENU** of the program will appear.
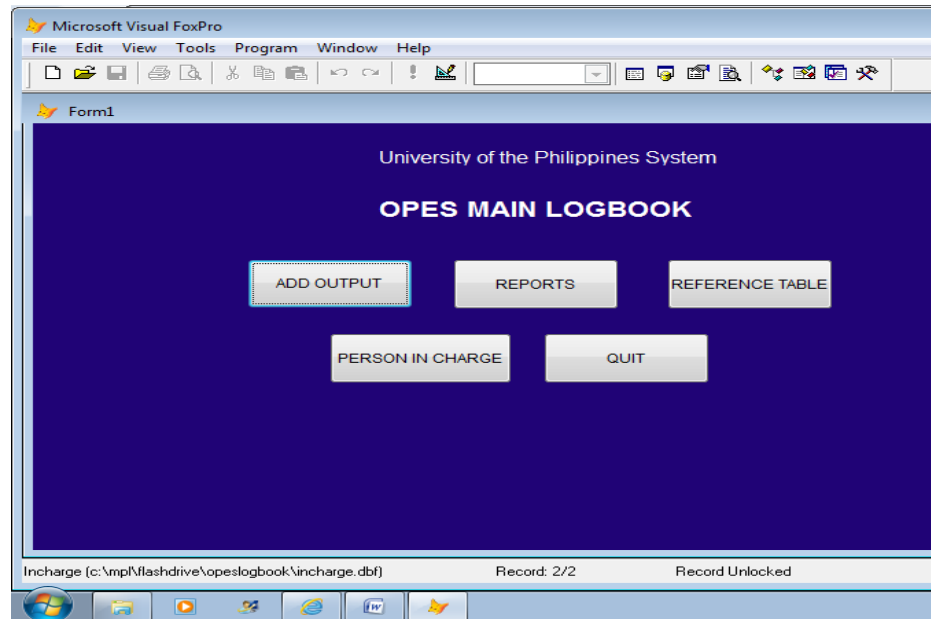
2. The **OPES Logbook** has five (5) main parts:
   a. **Add Output** – this is where you will input all the output of the employee;
   b. **Reports** – this will generate the required reports (i.e. Output per person for a given period, reference table sorted by code or by output, total output of the office/unit, etc.;
   c. **Reference Table** – this is where you will input your unit/office reference table;
   d. **Person-in-Charge –** this is where you will input the names of personnel who will be in-charge of a certain output;
   e. **Quit** – this will close the program.

3. The OPES Reference Table Sub-Menu

    a. Before you can fully utilize the program, you need to load the OPES Reference Table of your unit in this sub-menu.

    b. Click the **REFERENCE TABLE** icon in the Main Menu and it will move you to the Reference Table sub-menu.

    c. Click **ADD** icon on top to start adding the **reference table of** your unit. All fields should be filled-out. Items in the box are called Fields;

    d. The **BROWSE** icon will help you locate a particular function. Initially, it will display the code and function sorted by Code;

    e. The **TOP** icon will bring you to the earliest data encoded;

    f. The **BOTTOM** icon will lead you to the last data encoded;

g. The **NEXT** icon will move you to the next data/entry;

h. The **PREVIOUS** icon will move you to the previous data/entry;

i. The **QUIT** icon will return you to the main menu.

4. The PERSON-IN-CHARGE Sub Menu

a. This sub-menu will display the names of the person of your unit.
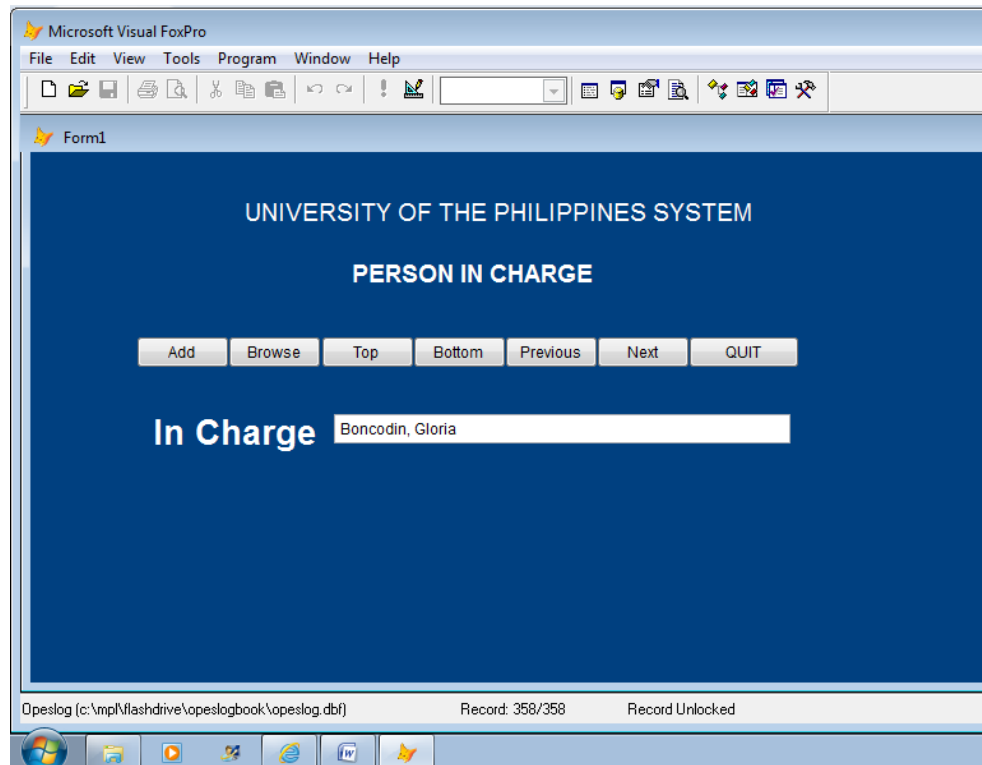
b. Click **ADD** icon on top to start adding the names of your personnel.

c. The **BROWSE** icon will help you locate the name of your personnel. It will display the sorted name of the personnel. Press the escape (**ESC**) key and it will return you to the personnel-in-charge menu. Now, you can check/edit the data.

d. The **TOP** icon will bring you to the earliest data encoded.

e. The **BOTTOM** icon will lead you to the last data encode.
f. The **NEXT** icon will move you to the next data/entry.
g. The **PREVIOUS** icon will move you to the previous data/entry.
h. The **QUIT** icon will return you to the main menu.

5. ADD OUTPUT SUB-MENU

a. Click the **ADD OUTPUT** icon.

b. Click **ADD** to store the output. The **NO. and DATE** will automatically be encoded. The date that will be recorded will be the current date of your system.
c. Input the **NAME** or the requesting party/ies in the **NAME** field.
d. Locate the **IN-CHARGE** or the person responsible for the output. Click the down arrow at the end of the field. Hit the **ENTER** key.

e. Input the **PERCENTAGE CONTRIBUTION** of the person to the output, if any. If the output is totally done by a single person, the percentage should be 100%. **DON'T** leave this field blank. The **POINTS EARNED** field will not be automatically computed if **PERCENTAGE DISTRIBUTION** was left blank.

f. Locate the **OUTPUT** by clicking the arrow in the field. Move the cursor to the particular output and press the **ENTER** key. This will automatically display the function, code, performance indicator and point/s.

g. Input the quantity of the output in the **NO.** field. Press **ENTER** until the cursor leaves the **POINTS EARNED** field.

h. The **BROWSE** icon on top will locate the record that you are looking for. Click the **BROWSE** icon and the **NO., DATE** and **NAME** fields will appear sorted by **NO.**. Once the data has been located, press the escape (**ESC**) key and it will return you to the **ADD** Menu screen and now, you can check/edit the stored data.

i. The **BROWSE NAME** Icon on top will also locate the record that you are looking for. Click the **BROWSE NAME** and the **NO, DATE and NAME** fields will appear sorted by **NAME**. Once the data has been located, press the escape (**ESC**) key and it will return you to the **ADD** Menu screen. You can now check/edit the data.

j. The **TOP** icon will bring you to the earliest data encoded.

k. The **BOTTOM** icon will lead you to the last data encoded.

l. The **NEXT** icon will move you to the next data/entry.

m. The **PREVIOUS** icon will move you to the previous data/entry.

n. The **QUIT** icon will return you to the main menu.

6. The REPORTS Sub Menu

a. The **REPORTS** Sub Menu will provide you with the following reports:

    i. Reference Table sorted by Code

    ii. Reference Table sorted by Output

    iii. Total Points Per Office

    iv. Individual PES

    v. Individual PES per Office.
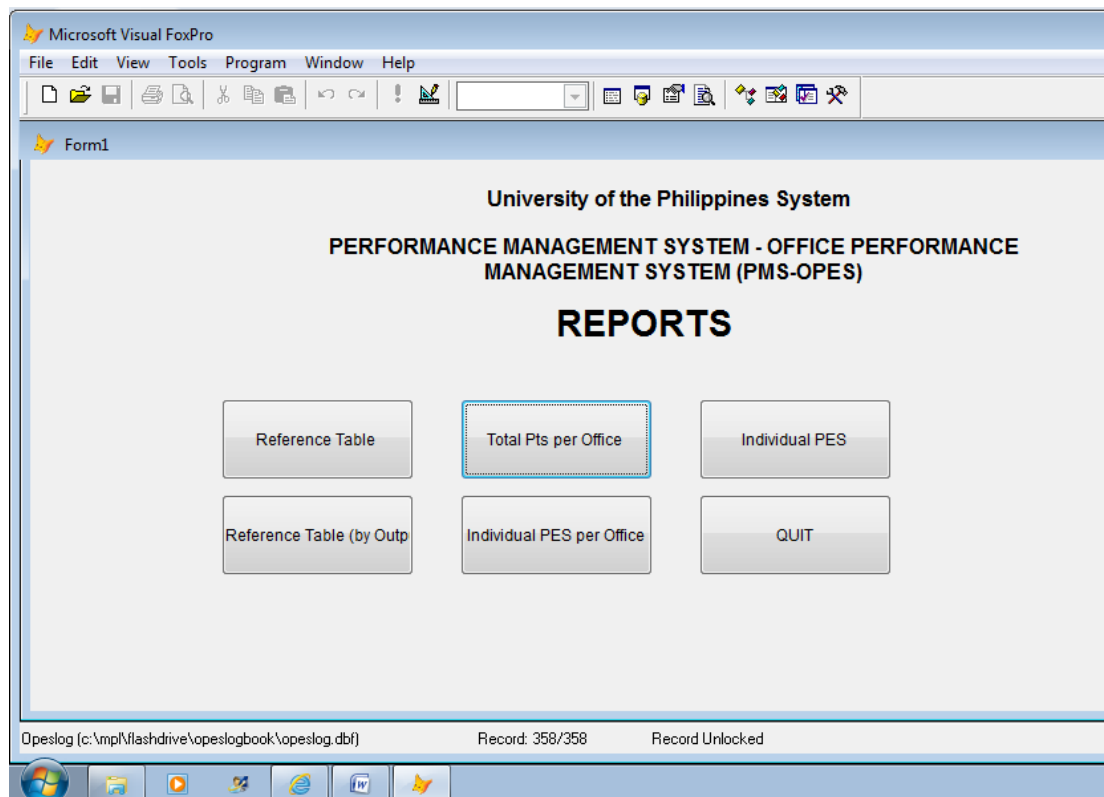
b. Reference Table sorted by Code

i. The **REFERENCE TABLE** sorted by Code will display the reference table of the Unit arranged by Code.

c. Reference Table sorted by Output

i. The **REFERENCE TABLE SORTED BY OUTPUT** will display the reference table of the Unit arranged by Output.

d. Total Points per Office

    i. The **TOTAL POINTS PER OFFICE** will display the total points earned by the Office or Unit for a particular period. In this case, 377.680 points was the total points earned by the Office for the period January 1 to June 30, 2010.

University of the Philippines
OPEN UNIVERSITY
For the period ___01/01/2010__ to _____06/30/2010__

Code	Function	Output	No.	Point/s	Total Pts.
HRD-IM-001	To digitize the 201 files of all University Employees	201 files in digital format updated	1	0.50	0.50
HRD-BE-045	To prepare Agency Remittance Advice (ARA) for inclusion/deletion of membership or updating of records to GSIS	Agency Remittance Advices	59	0.17	10.03
HRD-RS-009	To examine and check for the completeness of documents for request to fill-up vacant item	Authority to fill-up vacant item checked Complete attachments	9	0.08	0.72
HRD-RS-010	To prepare and process authoirrty to fill-up vacant positison as an exemption from AO 4 series of 1989	Authority to fill-up vacant item recommendation evaluated	9	0.25	2.25
HRD-BE-022	To prepare certificates of employment and compensation upon request	Certificate of employment	13	0.25	3.25
HRD-AP-030	To prepare contract of services/job orders as requested by other offices	Contract of services/job orders	19	0.33	6.27

Code	Function	Output	No.	Point/s	Total Pts.
	Records of employees				
HRD-BE-008	To process all applications for tuition fee privileges of personnel and dependents	Tuition fee privilege application duly certified	1	0.170	0.170
HRD-BE-035	To process applications for University clearance	University clearance processed & duly certified	1	0.050	0.050
HRD-RS-003	To check submitted applications and supporting documents for the vacant position	Verified applications	28	0.420	11.760
		Total Points			**377.680**

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e. Individual PES [Individual PES]
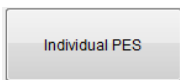
> i. The **INDIVIDUAL PES** will display the total points garnered by an individual for a particular period of time. In this case, 69.770 points was the total points earned by Ms. Boncodin for the period January 1 to June 30, 2010.

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File   Edit   View   Tools   Program   Window   Help

University of the Philippines
OPEN UNIVERSITY
For the period   01/01/2010   to   06/30/2010

Code	Function	Output	%	No.	Point/s	Total Pts.
In Charge: Boncodin, Gloria						
HRD-IM-001	To digitize the 201 files of all University Employees	201 files in digital format updated	100.00	1	0.500	0.500
HRD-BE-022	To prepare certificates of employment and compensation upon request	Certificate of employment	100.00	13	0.250	3.250
HRD-BE-046	To approve GSIS loans	GSIS loans approved	100.00	19	0.170	3.230
HRD-BE-015	To process applications for leaves, record undertime and tardiness compute and record balances of vacation, sick maternity, paternity and special leav	Leave balance updated	100.00	64	0.170	10.880
HRD-RS-004	To prepare referral letter for the conduct of psychological/skills examination	Letter request prepared for psychological exam	100.00	1	0.080	0.080

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File   Edit   View   Tools   Program   Window   Help

HRD-AP-023	To prepare a Monthly Report on Accession (MRA) for submission to CSC	Monthly Report on Accession submitted to CSC	100.00	2	0.170	0.340
HRD-AP-013	To prepare a Report on Appointments Issued (RAI) every month for submission to CSC.	Monthly Report on Appointments Issued (RAI)	100.00	53	0.250	13.250
HRD-AP-025	To prepare monthly/quarterly report on separations for submission to CSC and OSU	Monthly/Quarterly report of Separation submitted to CSC and OVPA	100.00	2	1.000	2.000
HRD-AP-026	To prepare the PSI-POP for submission to the DBM	PSI- POP updated	100.00	64	0.250	16.000
HRD-BE-029	To process accomplished Phil health hospitalization form for signature of the HRDO chief	PhilHealth form 1 processed	100.00	18	0.080	1.440
HRD-AP-028	To review/check, verify entries and print Service Records of employees	Service Records of personnel	100.00	6	0.250	1.500
HRD-BE-008	To process all applications for tuition fee privileges of personnel and dependents	Tuition fee privilege application duly certified	100.00	1	0.170	0.170
	Total Points					69.770

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f. Individual PES per Office [Individual PES per Office]

i. The **INDIVIDUAL PES PER OFFICE** will display the total points earned by each personnel of the unit as well as the accumulated points of the Office or unit. In this case, Ms. Boncodin got 69.770, Mr. Lagaya got 307.910 and 377.680 was the total points earned by the unit for the period January 1 to June 30, 2010.

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File   Edit   View   Tools   Program   Window   Help

100%

University of the Philippines
OPEN UNIVERSITY
For the period 01/01/2010 to 06/30/2010

Code	Function	Output	%	No.	Point/s	Total Pts.
In Charge: Boncodin, Gloria						
HRD-AP-013	To prepare a Report on Appointments Issued (RAI) every month for submission to CSC.	Monthly Report on Appointments Issued (RAI)	100.00	53	0.250	13.250
HRD-AP-023	To prepare a Monthly Report on Accession (MRA) for submission to CSC	Monthly Report on Accession submitted to CSC	100.00	2	0.170	0.340
HRD-AP-025	To prepare monthly/quarterly report on separations for submission to CSC and OSU	Monthly/Quarterly report of Separation submitted to CSC and OVPA	100.00	2	1.000	2.000
HRD-AP-026	To prepare the PSI-POP for submission to the DBM	PSI- POP updated	100.00	64	0.250	16.000

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File   Edit   View   Tools   Program   Window   Help

Code	Function	Output	%	No.	Point/s	Total Pts.
HRD-RS-005	To prepare list of qualified applicants	List of applicants	100.00	9	0.330	2.970
		Total Points				**69.770**

In Charge: Lagaya, Michael

Code	Function	Output	%	No.	Point/s	Total Pts.
HRD-AD-004	To draft Memorandum Circulars (MC)	Memorandum Circulars (MC)	100.00	3	0.500	1.500
HRD-AP-018	To prepare and issue notices of appointments on additional assignment basis.	Notices of appointments on additional assignment basis	100.00	94	0.250	23.500
HRD-AP-030	To prepare contract of services/job orders as requested by other offices	Contract of services/job orders	100.00	19	0.330	6.270
HRD-BE-029	To process accomplished Phil health hospitalization form for signature of the HRDO chief	PhilHealth form 1 processed	100.00	1	0.080	0.080
HRD-BE-031	To prepare retirement applications and supporting documents for submission to GSIS	GSIS retirement application processed	100.00	1	8.000	8.000
HRD-BE-045	To prepare Agency Remittance Advice (ARA) for inclusion/deletion of membership	Agency Remittance Advices	100.00	49	0.170	8.330

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File   Edit   View   Tools   Program   Window   Help

Code	Function	Output	%	No.	Point/s	Total Pts.
HRD-RS-001	To prepare the publication of all itemized vacant position (CSC Bulletion of vacant positions) for all non-teaching positions	List of itemized vacant positions to CSC for posting in the CSC Bulletin of	100.00	4	0.250	1.000
HRD-RS-002	To prepare and post job vacancies to at least three (3) conspicuous places	Job vacancy announcement	100.00	9	0.250	2.250
HRD-RS-003	To check submitted applications and supporting documents for the vacant position	Verified applications	100.00	28	0.420	11.760
HRD-RS-007	To prepare index/profile of applicants	Profile of applicants	100.00	28	0.050	1.400
HRD-RS-009	To examine and check for the completeness of documents for request to fill-up vacant item	Authority to fill-up vacant item checked Complete attachments	100.00	9	0.080	0.720
HRD-RS-010	To prepare and process authoirrty to fill-up vacant positison as an exemption from AO 4 series of 1989	Authority to fill-up vacant item recommendation evaluated	100.00	9	0.250	2.250
HRD-RS-011	To conduct Job Audit	Job Audit Report	100.00	10	24.000	240.000
		Total Points				**307.910**
		Total Points - OFFICE				**377.680**

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