

2022 EMPLOYEE PERFORMANCE REVIEW

(For Rank and File to Supervisory Position)

CCS-JV-HR2021.11.010

Employee Name: Balane, Ronnah Mae
Position: Tax Associate
Review Period: August 16 to January 16, 2022

Department: Accounting and Tax
Date Hired: 16-Aug-22
Date of Appraisal: 27-Dec-22

This Performance Appraisal Form aims to provide a formal, recorded, regular review of an individual's performance. It is to be used for annual evaluations, and at other times during the year when formal feedback is needed.

Purpose of Evaluation

- ☒ Probationary Evaluation
☐ Semi-Annual Evaluation
☐ Annual Evaluation
☐ Others, please specify: _____

This is a four (4) part Appraisal Form which is as follows :

PART	KPI	Percentage	Definition
Part I	Performance Objective	70%	Expected Deliverables and Work Output
Part II	Work-Related Competence	20%	Competencies needed to execute the Job Properly
Part III	HR Related Performance Factors	10%	HR Factors affecting the Employee's Performance
Part IV	Individual Development Plan	-	Professional Development and Career Planning
	Total Performance Rating and Comments	100%	Rating and Comments

RATING SCALE

Using the below definitions, use scale 1 - 5 that most closely describes the staff member's performance for each of the required performance factors. If a performance factor does not apply, please leave blank.

Rating	Description	Definition
5	Exceptional	Contributions and excellent work are widely recognized. Performance consistently exceeds all defined expectations, producing important and impactful results through superior planning, execution, and creativity.
4	Exceeds Expectations	Performance consistently exceeded expectations in all <i>essential</i> areas of responsibility, and the quality of work overall was excellent. Annual goals were met.
3	Meets Expectations	Performance consistently met expectations in all essential areas of responsibility. The employee makes a solid, reliable and meaningful contribution to the department.
2	Needs Improvement	Performance falls below expectations on one or two job requirements and responsibilities. A performance improvement plan should be outlined in the Individual Development Plan (Part IV). Failure to pass the performance improvement plan will result in termination.
1	Unsatisfactory	Performance falls below expectations on several critical job requirements and responsibilities. Without significant improvement reassignment or separation are indicated. A performance improvement plan must be in place and monitored progress. Failure to pass the performance improvement plan will result in termination.

INTERPRETATION

91%	-	100%	Exceptional
81%	-	90%	Exceeds Expectation
71%	-	80%	Meets Expectations
61%	-	70%	Needs Improvement
60%	-	below	Unsatisfactory

PART I – PERFORMANCE OBJECTIVE (70%)

PERFORMANCE OBJECTIVE	RATING (5, 4, 3, 2, 1)	SCORE (Automatic) <i>Do not type anything</i>	WORK OUTPUT <i>(Supporting documents, Critical Incidents, Justifications)</i>
1. Monthly and Quarterly tax filling, payment and submission of related attachments. 2.Substantiation and maintenance of INPUT VAT - Official receipt and Sales Invoice	4	21	Filed all tax returns (EWT, Withholding Compensation and VAT) timely and accurate for the seven companies in Cebu - minimal transactions. And all Check vouchers transmitted by Treasury were substantiated and scanned on time.
Validation of supporting documents and checking of Expense accounts upon PCF Review from the PCF Custodian and other clerical accounting tasks	4	21	Performs the task with a sense of urgency without compromising the quality of work - she was able to check as to the completeness and accuracy of the supporting documents and has the ability to determine the type of Expense account with minimal supervision and in an efficient manner
FS report and BIR 2307 Issuance	3	18.67	She was able to meet the expectations of the requestors by providing the BIR 2307 Certificates once a week or whenever it is needed (depends on the urgency) with less to no error. And perform MEC activities (Foison and Wishes) on timely manner.
TOTAL (%)	4	60.7	

PART II – WORK-

COMPETENCIES	RATING (5, 4, 3, 2, 1)	SCORE (Automatic) <i>Do not type anything</i>	CRITICAL INCIDENTS <i>(STAR Model: Situation Tasks Action Result)</i>
Initiative	3	5.33	She can accomplish her assigned tasks with her own approach that still leads to the same outcome - she has the ability to assess things and seek ways on how to do the tasks effectively and efficiently.
Attention to details	3	5.33	She is a very keen observant when it comes to work - has the ability to determine the portion that needs to be corrected and proactively provide solution with the issues encountered. During the training of the process/task assigned to her, she always asks questions (if needed) for clarity and common understanding between her and the trainor
Collaborative	4	6	Open to suggestions and willing to show her new approaches discovered within the team to make the work process smoother. Coordinates with the other departments in the validation of documents and not hesitant in seeking confirmation from the custodian especially to the variances encountered upon review of the PCF replenishment.
TOTAL (%)	3.333333333	16.7	

Part III – HR RELATED PERFORMANCE FACTORS (10%)*(To be filled out or validated by the HR)*

HR RELATED FACTORS	RATING (5, 4, 3, 2, 1)	SCORE (Automatic) <i>Do not type anything</i>	REMARKS
Conduct and Compliance to Company Policies	4	3	Adhered to Company policies, procedures and memorandums
Attendance and Punctuality	4	3	Always early in the office, less absences
Learning and Development	3	2.67	Attended and participated in Training conducted by HR.
TOTAL (%)	4	8.7	

TOTAL PERFORMANCE RATING	86.0%	Exceeds Expectation
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PART IV - INDIVIDUAL DEVELOPMENT PLAN

PERFORMANCE CRITERIA	DEVELOPMENTAL PROGRAMS	TARGET SCHEDULE
WORK PERFORMANCE	1 Increase Job knowledge for efficiency in reporting requirements from payables (FS reports and schedules thru Tax and Accounting updates and meeting)	Monthly
	2 Increase BIR compliance knowledge by attending seminars/orientation on expanded withholding taxes on customer collections, VAT on collections, BIR receipting	2022
	3 Increase in knowledge on Tax code of the Philippines through constant reading, attending tax trainings and develop the analytical tax reconciliation	Daily
COMPETENCIES	1 Improve advance excel skills thru trainings	2023
	2 Improve communication and presentation skills	Daily
ADVANCEMENT TO THE DESIRED POSITION	1 Attend skills training/orientation - this will improve work productivity and help in preparation to handle much bigger tasks in the future.	2023
	2 Update in Accounting Standards and principles applicable to real estate	2023
	3 Improve decision making - rationally compares options or alternative courses of actions.	2023

Part V – TOTAL PERFORMANCE RATING AND EVALUATOR/ RATEE AND COMMENTS

EVALUATOR/ RATER COMMENTS:

Ronnah Balane has shown improvement . She can easily grasp ideas and instructions and even provide recommendations and suggestions to deliver output in the most efficient manner. She's very eager in taking new responsibilities and is open to express any areas of concern and clarifications. Aside from being so dedicated to whatever tasks assigned to her, she always managed to portray a positive outlook and accomplished the tasks with less error and minimal supervision. She always go extra mile and with this, it is evident that she's commendable to be regularized as I believed that she has more to offer in the organization.

I have met with the above-named employee to discuss and review this performance appraisal.

Evaluator Signature:

Date:


Junelyn Mutia/Benlisa Oporto

Ruth Andres

Printed Name & Signature

Print Name and Signature

EMPLOYEE'S / RATEE'S COMMENTS:

I greatly appreciate the positive review on my performance evaluation. I am grateful for your trust and confidence in my abilities. Thank you for your guidance and support.

I have had the opportunity to review this performance appraisal and to discuss it with my supervisor.

Employee's / Ratee's Signature

Date:


RONNAH MAE BALANE

01/24/2023

Printed Name & Signature