



**COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF**

**Annex P**

Name of Administrative Staff: **VALERIE Y. VERGIS**

| Particulars<br>(1)  | Numerical<br>Rating (2) | Percentage<br>Weight<br>(3) | Equivalent<br>Numerical Rating<br>(2x3) |
|---|-------------------------|-----------------------------|---|
| 1. Numerical Rating per IPCR  | 4.91                    | 70%                         | 3.437                                   |
| 2. Supervisor/Head's assessment<br>of his contribution towards<br>attainment of office<br>accomplishments | 4.92                    | 30%                         | 1.476                                   |
| <b>TOTAL NUMERICAL RATING</b>   |                         |                             | <b>4.913</b>                            |

TOTAL NUMERICAL RATING: 4.913

Add: Additional Approved Points, if any:       

TOTAL NUMERICAL RATING: 4.913

FINAL NUMERICAL RATING 4.913

ADJECTIVAL RATING: OUTSTANDING

Prepared by:

  
**VALERIE Y. VERGIS**  
Administrative Aide IV

Reviewed by:

  
**ERLINDA S. ESGUERRA**  
Head, Accounting Office

Recommending Approval:

  
**LOUELLA C. AMPAC**  
Director, Financial Management Office

Approved:

  
**REMBERTO A. PATINDOL**  
Vice President, Administration and Finance Office

# **INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)**

I, **VALERIE Y. VERGIS**, staff of the Accounting Office commits to deliver and agree to be rated on the attainment of the following accomplishments in accordance with the indicated measures for the period **January 1 to June 30, 2021**.

**VALERIE Y. VERGIS**

Ratee

Date: 22 Jun 2021

Approved: **ERLINDA S. ESGUERRA**

Head of Unit

Date: 23 Jun 2021

**Rating Equivalents:**

5 - Outstanding  
4 - Very Satisfactory  
3 - Satisfactory  
2 - Fair  
1 - Poor

| MFO & PAPs   | Success Indicators   | Tasks Assigned  | Target            | Percentage (%)<br>of<br>Accomplishme | Actual<br>Accomplis<br>hment | Rating |    |    |      | Remarks   |
|--|--|---|-------------------|--------------------------------------|------------------------------|--------|----|----|------|---|
|  |  |   |                   |                                      |                              | Q¹     | E² | T³ | A⁴   |   |
| UMFO5: SUPPORT TO OPERATIONS                             |  |   |                   |                                      |                              |        |    |    |      |   |
| OVPAF MFO2: Financial Services and Management            |  |   |                   |                                      |                              |        |    |    |      |   |
| ODF MFO2: Accounting Services                            |  |   |                   |                                      |                              |        |    |    |      |   |
| Acctg MFO1: ISO 9001:2015 aligned documents              |  |   |                   |                                      |                              |        |    |    |      |   |
|  | PI1. Number of quality procedures prepared/revised           | Assists in preparing/revising quality procedures                              | 1                 | 100.00%                              | 1                            | 5      | 4  | 4  | 4.33 | 1 Quality Procedure prepared/ revised   |
|  | No. of documents coded based on ISO 9001:2015 standard forms | Codes documents   | 220               | 165.00%                              | 363                          | 5      | 5  | 5  | 5.00 | 363 coded documents   |
|  | No. of internal and external documents posted/monitored      | Posts/monitors internal and external documents                                | 315               | 144.44%                              | 455                          | 5      | 4  | 5  | 4.67 | 455 posted/monitored internal and external documents  |
| Acctg MFO2: Innovation & best practices services         |  |   |                   |                                      |                              |        |    |    |      |   |
|  | PI2. Number of innovation for improved university operations | Assists   | 1                 | 100.00%                              | 1                            | 5      | 4  | 5  | 4.67 |   |
|  | PI3. Number of best practices achieved                       |   | 1                 | 100.00%                              | 1                            | 5      | 5  | 5  | 5.00 |   |
| UMFO6: GENERAL ADMINISTRATION SUPPORT SERVICES           |  |   |                   |                                      |                              |        |    |    |      |   |
| OVPAF MFO2: Financial Services and Management            |  |   |                   |                                      |                              |        |    |    |      |   |
| ODF MFO2: Accounting Services                            |  |   |                   |                                      |                              |        |    |    |      |   |
| Acctg MFO1: Administration Support Services & Management |  |   |                   |                                      |                              |        |    |    |      |   |
|  | PI1. Customer Friendly Service                               | Serves client with courtesy; immediate response to client needs and inquiries | 100% no complaint | 100.00%                              | 100                          | 5      | 5  | 5  | 5.00 | 100% no complaint; Served clients with courtesy; immediate response to client needs and inquiries |




|   |  |   |        |         |        |   |   |   |      |   |
|---|--|---|--------|---------|--------|---|---|---|------|---|
|   | PI2. Number of external linkages for improved financial management developed/ maintained                     | Facilitates external linkages for the improvement of financial transactions   | 6      | 100.00% | 6      | 5 | 5 | 5 | 5.00 | 6 external linkages (COA, GSIS, BIR, PHILHEALTH, PAG-IBIG, and LBP)   |
|   | Number of office communications/documents drafted  | Drafts office communications/ documents   | 65     | 135.38% | 88     | 5 | 5 | 5 | 5.00 | 88 office communications/ documents (e.g. Work Schedule, SWOTAR, OPCR, IPCR and its supporting documents, Work&Financial Plan, etc) |
| <b>Acctg MFO2: Disbursement / Processing Services</b> |  |   |        |         |        |   |   |   |      |   |
|   | No. of summary from payroll encoded error free   | Encodes summary from payroll error free   | 480    | 150.00% | 720    | 5 | 5 | 5 | 5.00 | Regular, PCC, Casual payroll  |
|   | No. of entries encoded error free  | Encodes individual remittances of premiums and loan repayments to agency's database (GSIS, Philhealth, HDMF, BIR, LBP and others) | 38,500 | 138.26% | 53,230 | 5 | 4 | 5 | 4.67 | 53,230 individual remittances of premiums and loan repayments remitted to concerned agency  |
|   | No. of Tax Remittance Advice (TRA) prepared/consolidated within mandated time                                | Prepares/Consolidates Tax Remittance Advice (TRA) within mandated time  | 6      | 100.00% | 6      | 5 | 5 | 5 | 5.00 | 1 TRA for 5 campuses per month  |
|   | No. of fund type monitored for BIR remittances   | Monitors fund type for BIR remittances  | 6      | 116.67% | 7      | 5 | 5 | 5 | 5.00 | 7 fund types (101 GF, 101 T, 164 STF, 161 IGP, PCC, VSU Philhealth Prof. Fees, VSU Philhealth)                                      |
|   | No. of remittance list per fund prepared within mandated time  | Prepares monthly consolidated remittance list to various agencies as supporting documents   | 350    | 148.57% | 520    | 5 | 5 | 5 | 5.00 | 520 monthly consolidated remittance list  |
|   | No. of vouchers for remittances prepared error free (journalizing accounting entry included)                 | Prepares disbursement vouchers for remittances to different agencies  | 350    | 145.71% | 510    | 5 | 5 | 5 | 5.00 | 510 disbursement vouchers   |
|   | No. of Obligation Request and Status (ORS) or Budget Utilization Request & Status (BURS) prepared error free | Prepares Obligation Request and Status (ORS) or Budget Utilization Request and Status (BURS)                                      | 180    | 183.33% | 330    | 5 | 5 | 5 | 5.00 | 330 Obligation Request and Status (ORS) or Budget Utilization Request and Status (BURS)   |
|   | No. of BIR quarterly report prepared   | Prepares BIR quarterly report   | 2      | 100.00% | 2      | 5 | 5 | 5 | 5.00 | 2 quarterly reports   |

|  |   |   |      |         |              |             |       |       |       |  |
|--|---|---|------|---------|--------------|-------------|-------|-------|-------|--|
|  | No. of individual income tax return and alphalist prepared within mandated time | Prepares Annual Information Return of Income Tax withheld on Compensation and Final Withholding Tax(2307 & 2316)  | 1200 | 135.42% | 1,625        | 5           | 5     | 5     | 5.00  | 1,625 BIR Form 2307 and 2316   |
|  | No. of BIR documents submitted within mandated time                             | Submits Monthly BIR Remittances (eFPS) and Annual Information Return of Income Tax withheld on Compensation and Final Withholding Tax (BIR Form No. 2307 & BIR Form No. 2316) | 80   | 293.75% | 235          | 5           | 5     | 5     | 5.00  | Approx 17 eFPS Monthly BIR Remittances; 2 Annual Information Return of Income Tax withheld on Compensation and Final Withholding Tax (BIR Form No. 2307 & BIR Form No. 2316) |
|  |   |   |      |         | Total points | 90.00       | 86.00 | 89.00 | 88.33 | <b>Comments &amp; Recommendations for Development Purpose:</b><br><br>To attend trainings for updates on Acctg. System, Remittances and Records Management                   |
| Total Over-all Rating                                |   |   |      |         |              | 88.33       |       |       |       |  |
|  |   |   |      |         |              |             |       |       |       |  |
| Average Rating                                       |   |   |      |         |              | 4.91        |       |       |       |  |
| Additional points:                                   |   |   |      |         |              |             |       |       |       |  |
| Approved additional points (with copy of approval) : |   |   |      |         |              |             |       |       |       |  |
| Final Rating   |   |   |      |         |              | 4.91        |       |       |       |  |
| Adjectival Rating                                    |   |   |      |         |              | Outstanding |       |       |       |  |

1 - quality    2 - efficiency    3 - timeliness    4 - average

Evaluated and Rated by:

  
**ERLINDA S. ESGUERRA**  
 Head, Accounting Office  
 Date: 23 June 2021

Recommending Approval:

  
**LOUELLA C. AMPAC**  
 Director, Financial Management Office  
 Date: 23 June 2021

Approved:

  
**REMBERTO A. PATINDOL**  
 VP for Administration and Finance  
 Date: 24 June 2021



## Exhibit I

**PERFORMANCE MONITORING FORM**Name of Employee: **VALERIE Y. VERGIS**

| <b>Task No.</b> | <b>Task Description</b>   | <b>Expected Output</b>  | <b>Date Assigned</b>                            | <b>Expected Date to Accomplish</b>                        | <b>Actual Date Accomplished</b>    | <b>Quality of Output*</b> | <b>Over-all assessment of output**</b> | <b>Remarks/ Recommendation</b> |
|-----------------|---|---|---|---|------------------------------------|---------------------------|--|--------------------------------|
| 1               | Encodes summary from payroll error free   | Summary from Payroll  | Monthly (after processing of payroll)           | 2 working days after the date assigned                    | After 2 working days               | Very Impressive           | Outstanding                            |                                |
| 2               | Encodes individual remittances of premiums and loan repayments to agency's database (GSIS, Philhealth, HDMF, BIR, LBP and others) | Individual remittances of premiums and loan payments                                | Monthly (after encoding the payroll summary)    | 10 working days after the date assigned (all remittances) | 10 <sup>th</sup> of the next month | Very Impressive           | Outstanding                            |                                |
| 3               | Prepares/Consolidates Tax Remittance Advice (TRA) within mandated time  | Tax Remittance Advice (TRA)   | Monthly (1 <sup>st</sup> day of the next month) | 5 working days  | 5 <sup>th</sup> of the next month  | Impressive                | Very Satisfactory                      |                                |
| 4               | Monitors fund type for BIR remittances  | BIR Remittances Fund Type   | Monthly   | Monthly   | 10 <sup>th</sup> of the next month | Impressive                | Outstanding                            |                                |
| 5               | Prepares monthly consolidated remittance list to various agencies as supporting documents   | monthly consolidated remittance list to various agencies                            | Monthly (after encoding the payroll summary)    | 10 working days after the date assigned (all remittances) | 10 <sup>th</sup> of the next month | Impressive                | Outstanding                            |                                |
| 6               | Prepares disbursement vouchers for remittances to different agencies  | disbursement vouchers for remittances   | Monthly (after preparing the remittance list)   | 1 working day after the date assigned (all remittances)   | 10 <sup>th</sup> of the next month | Very Impressive           | Outstanding                            |                                |
| 7               | Prepares Obligation Request and Status (ORS) or Budget Utilization Request and Status (BURS)                                      | Obligation Request and Status (ORS) or Budget Utilization Request and Status (BURS) | Monthly (after preparing the remittance list)   | 1 working day after the date assigned (all remittances)   | 10 <sup>th</sup> of the next month | Very Impressive           | Outstanding                            |                                |
| 8               | Prepares BIR quarterly report   | BIR quarterly report  | Quarterly                                       | 2 working days  | 10 <sup>th</sup> of the next month | Impressive                | Outstanding                            |                                |

|    |  |   |          |         |   |            |                   |  |
|----|--|---|----------|---------|---|------------|-------------------|--|
| 9  | Prepares Annual Information Return of Income Tax withheld on Compensation and Final Withholding Tax(2307 & 2316) | Annual Information Return of Income Tax withheld on Compensation & Final Withholding Tax(2307 & 2316) | Annually | 1 month | Last working day of the following month of the year | Impressive | Very Satisfactory |  |
| 10 | Bookkeeper, LSU-Administrative Personnel Association (LSU-AdPA)  |   |          |         |   |            |                   |  |
| 11 | Prepares/Issues/Maintains/Retrieves/ Controls documents and records  |   |          |         |   |            |                   |  |
| 12 | Do other tasks given by the Unit Head  |   |          |         |   |            |                   |  |

\* Either very impressive, impressive, needs improvement, poor, very poor

\*\* Outstanding, very satisfactory, satisfactory, unsatisfactory, poor

Prepared by:

  
**ERLINDA S. ESGUERRA**  
Unit Head





## Instrument for Performance Effectiveness of Administrative Staff

Rating Period: **January 1 – June 30, 2021**

Name of Staff: **VALERIE Y. VERGIS**

Position: **Administrative Aide IV**

**Instruction to supervisor: Please evaluate the effectiveness of your subordinate in contributing towards attainment of the calibrated targets of your department/office/center/college/campus using the scale below. Encircle your rating.**

| Scale | Descriptive Rating | Qualitative Description   |
|-------|--------------------|---|
| 5     | Outstanding        | The performance almost always exceeds the job requirements. The staff delivers outputs which always results to best practice of the unit. He is an exceptional role model |
| 4     | Very Satisfactory  | The performance meets and often exceeds the job requirements  |
| 3     | Satisfactory       | The performance meets job requirements  |
| 2     | Fair               | The performance needs some development to meet job requirements.  |
| 1     | Poor               | The staff fails to meet job requirements  |


| A. Commitment (both for subordinates and supervisors) |   | Scale |   |   |   |   |
|---|---|-------|---|---|---|---|
| 1.  | Demonstrates sensitivity to client's needs and makes the latter's experience in transacting business with the office fulfilling and rewarding.  | 5     | 4 | 3 | 2 | 1 |
| 2.  | Makes self-available to clients even beyond official time   | 5     | 4 | 3 | 2 | 1 |
| 3.  | Submits urgent non-routine reports required by higher offices/agencies such as CHED, DBM, CSC, DOST, NEDA, PASUC and similar regulatory agencies within specified time by rendering overtime work even without overtime pay | 5     | 4 | 3 | 2 | 1 |
| 4.  | Accepts all assigned tasks as his/her share of the office targets and delivers outputs within the prescribed time.  | 5     | 4 | 3 | 2 | 1 |
| 5.  | Commits himself/herself to help attain the targets of his/her office by assisting co-employees who fail to perform all assigned tasks   | 5     | 4 | 3 | 2 | 1 |
| 6.  | Regularly reports to work on time, logs in upon arrival, secures pass slip when going out on personal matters and logs out upon departure from work.  | 5     | 4 | 3 | 2 | 1 |
| 7.  | Keeps accurate records of her work which is easily retrievable when needed.   | 5     | 4 | 3 | 2 | 1 |
| 8.  | Suggests new ways to further improve her work and the services of the office to its clients   | 5     | 4 | 3 | 2 | 1 |
| 9.  | Accepts additional tasks assigned by the head or by higher offices even if the assignment is not related to his position but critical towards the attainment of the functions of the university                             | 5     | 4 | 3 | 2 | 1 |
| 10.   | Maximizes office hours during lean periods by performing non-routine functions the outputs of which results as a best practice that further increase effectiveness of the office or satisfaction of clientele               | 5     | 4 | 3 | 2 | 1 |
| 11.   | Accepts objective criticisms and opens to suggestions and innovations for improvement of his work accomplishment  | 5     | 4 | 3 | 2 | 1 |
| 12.   | Willing to be trained and developed   | 5     | 4 | 3 | 2 | 1 |
| Total Score   |   | 59    |   |   |   |   |

**Vision:**  
**Mission:**

A globally competitive university for science, technology, and environmental conservation.  
Development of a highly competitive human resource, cutting-edge scientific knowledge and innovative technologies for sustainable communities and environment.

| B. Leadership & Management ( <i>For supervisors only to be rated by higher supervisor</i> )  | Scale |   |   |   |   |
|--|-------|---|---|---|---|
| 1. Demonstrates mastery and expertise in all areas of work to gain trust, respect and confidence from subordinates and that of higher superiors  | 5     | 4 | 3 | 2 | 1 |
| 2. Visionary and creative to draw strategic and specific plans and targets of the office/department aligned to that of the overall plans of the university.  | 5     | 4 | 3 | 2 | 1 |
| 3. Innovates for the purpose of improving efficiency and effectiveness of the operational processes and functions of the department/office for further satisfaction of clients.  | 5     | 4 | 3 | 2 | 1 |
| 4. Accepts accountability for the overall performance and in delivering the output required of his/her unit.   | 5     | 4 | 3 | 2 | 1 |
| 5. Demonstrates, teaches, monitors, coaches and motivates subordinates for their improved efficiency and effectiveness in accomplishing their assigned tasks needed for the attainment of the calibrated targets of the unit | 5     | 4 | 3 | 2 | 1 |
| Total Score  |       |   |   |   |   |
| Average Score  | 4.92  |   |   |   |   |

Overall recommendation : \_\_\_\_\_

  
**ERLINDA S. ESGUERRA**  
 Head, Accounting Office



**Exhibit L**

**EMPLOYEE DEVELOPMENT PLAN**

Name of Employee: **VALERIE Y. VERGIS**

Performance Rating: Outstanding

Aim: Effective delivery of administrative service

Proposed Interventions to Improve Performance:

Date: January 1 Target Date: June 30, 2021

First Step:

In-house Training on Financial Management

Result: Improved Performance

Date: \_\_\_\_\_ Target Date: \_\_\_\_\_


Next Step:

Recommend for Promotion


Outcome: \_\_\_\_\_

Final Step/Recommendation:

Prepared by:

  
**ERLINDA S. ESGUERRA**  
Unit Head

Conforme:

  
**VALERIE Y. VERGIS**  
Name of Ratee Faculty/Staff