

COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

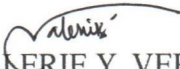
Name of Administrative Staff: VALERIE Y. VERGIS

Particulars (1)	Numerical Rating (2)	Percentage Weight 70% (3)	Equivalent Numerical Rating (2x3)
23. Numerical Rating per IPCR	4.90	4.90 x 70%	3.43
24. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	4.83	4.83 x 30%	1.45
TOTAL NUMERICAL RATING			4.88

TOTAL NUMERICAL RATING: 4.88
Add: Additional Approved Points, if any: 0.00
TOTAL NUMERICAL RATING: 4.88

ADJECTIVAL RATING: OUTSTANDING

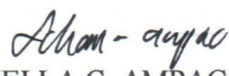
Prepared by:


VALERIE Y. VERGIS
Administrative Aide IV


Reviewed by:


ERLINDA S. ESGUERRA
Head, ACCOUNTING Office

Recommending Approval:


LOUELLA C. AMPAC
Director for Finance

Approved:


REMBERTO A. PATINDOL
Vice Pres. for Admin and Finance

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 July 1 to December 31, 2019.

VALERIE Y. VERGIS

Ratee

Date: _____

Approved:

ERLINDA S. ESGUERRA

Head of Unit

Date: _____

Rating Equivalents:

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

MFO & PAPs	Success Indicators	Tasks Assigned	Target	Percentage (%) of Accomplishme nt	Actual Accomplish ment	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	5.00	5.00	5.00	5.00	1 Quality Procedure prepared/ revised
	No. of documents coded based on ISO 9001:2015 standard forms	Coding the documents	100	155.00%	155	5.00	5.00	5.00	5.00	155 coded documents
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	Served clients with courtesy; immediate response to client needs and inquiries	100	100.00%	100	5.00	5.00	5.00	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	5.00	5.00	5.00	5.00	6 external linkages (COA, GSIS, BIR, PHILHEALTH, PAG-IBIG, and LBP)
Acctg MFO2: Disbursement / Processing Services										
	No. of summary from payroll encoded error free	Encodes summary from payroll error free	450	143.33%	645	5.00	5.00	5.00	5.00	84 pages per regular payroll per month
	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)	30,500	158.20%	48,250	5.00	5.00	4.00	4.67	48,250 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	5.00	5.00	5.00	5.00	1 TRA for 5 campuses per month
	No. of fund type monitored for BIR remittances	Monitors fund type for BIR remittances	5	120.00%	6	5.00	5.00	5.00	5.00	6 fund types [101 GF, 101 T, 164 STF, 161 IGP, PCC, Philhealth Prof. Fees (new registered fund type)]
	No. of remittance list per fund prepared within mandated time	Prepares monthly consolidated remittance list to various agencies as supporting documents	300	118.33%	355	5.00	5.00	4.00	4.67	355 monthly consolidated remittance list
	No. of vouchers for remittances prepared error free	Prepares disbursement vouchers for remittances to different agencies	175	140.00%	245	5.00	5.00	5.00	5.00	245 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)	150	153.33%	230	5.00	5.00	4.00	4.67	230 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	5.00	5.00	5.00	5.00	2 quarterly reports
	No. of individual income tax return and alpha list prepared within mandated time	Prepares Annual Information Return of Income Tax withheld on Compensation and Final Withholding Tax(2307 & 2316)	1100	118.18%	1,300	5.00	5.00	4.00	4.67	1,300 BIR Form 2307 and 2316
					Total points:	65.00	65.00	61.00	63.67	Comments & Recommendations for Development Purpose: To attend training for updates on Acctg. System
Total Over-all Rating						63.67				
Average Rating						4.90				
Additional points:										
Approved additional points (with copy of approval) :										
Final Rating						4.90				
Adjectival Rating						Outstanding				

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

Evaluated and Rated by:

ERLINDA S. ESGUERRA

Head, Accounting Office

Date: _____

Recommending Approval:

LOUELLA C. AMPAC

Director, Finance Office

Date: 2/5/20

Approved:

REMBERTO A. PATINDOL

VP for Administration and Finance

Date: _____

Exhibit I

PERFORMANCE MONITORING FORMName of Employee: **VALERIE Y. VERGIS**

Task No.	Task Description	Expected Output	Date Assigned	Expected Date to Accomplish	Actual Date Accomplished	Quality of Output*	Over-all assessment of output**	Remarks/ Recommendation
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 th of the next month	Impressive	Outstanding	
3	Prepares/Consolidates Tax Remittance Advice (TRA) within mandated time	Tax Remittance Advice (TRA)	Monthly (1 st day of the next month)	5 working days	5 th of the next month	Impressive	Very Satisfactory	
4	Monitors fund type for BIR remittances	BIR Remittances Fund Type	Monthly	Monthly	10 th 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 th 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 th of the next month	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 th of the next month	Impressive	Outstanding	
8	Prepares BIR quarterly report	BIR quarterly report	Quarterly	2 working days	10 th 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	
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* Either very impressive, impressive, needs improvement, poor, very poor

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

Prepared by:


ERLINDA S. ESGUERRA
Unit Head

Annex O

Instrument for Performance Effectiveness of Administrative Staff

Rating Period: July 1-Dec. 31, 2019
 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	5	4	3	2	1

improvement of his work accomplishment					
12 Willing to be trained and developed	5	4	3	2	1
Total Score					
B. Leadership & Management (For supervisors only to be rated by higher supervisor)	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	58				
Average Score	4.83				

Overall recommendation : _____


ERLINDA S. ESGUERRA
Name of Head

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: November. 2019

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