



COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

Annex P

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

Particulars (1)	Numerical Rating (2)	Percentage Weight (3)	Equivalent Numerical Rating (2x3)
1. Numerical Rating per IPCR	4.92	70%	3.44
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	4.92	30%	1.48
TOTAL NUMERICAL RATING			4.92

TOTAL NUMERICAL RATING: 4.92


Add: Additional Approved Points, if any: 4.92

TOTAL NUMERICAL RATING: 4.92


FINAL NUMERICAL RATING 4.92

ADJECTIVAL RATING: **Outstanding**

Prepared by:


VALERIE Y. VERGIS
Admin. Aide VI


Reviewed by:


NICK FREDDY R. BELLO
OIC-Head, Accounting Office

Recommending Approval:


LOUELLA C. AMPAC
Director, Financial Management Office

Approved:


DANIEL LESLIE S. TAN
Vice President for Administration 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 **January 1 to June 30, 2023**.

Ratee
Date: July 6, 2023

Approved: **NICK FREDDY R. BELLO**
Head of Unit
Date: July 6, 2023

Rating Equivalents:
5 - Outstanding
4 - Very Satisfactory
3 - Satisfactory
2 - Fair
1 - Poor

MFO & PAPs	Success Indicators	Tasks Assigned	Target (Jan 1 - Dec 31, 2023)	Percentage (%) of Accomplishme nt as of June 30, 2023	Actual Accomplis hment as of June 30, 2023	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
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	50.00%	0.50	5	4	5	4.67	Accomplished 50% of new procedure manual (Trust)
Acctg MFO2: Innovation & best practices services										
	PI2. Number of innovation for improved university operations	Assists in the scanning and uploading the files	1	100.00%	1	5	5	5	5.00	Continuous usage of google drive as backup storage.
		Implements excel spreadsheet that has a yearly and monthly tax calculator to be more efficient and error-free	1	100.00%	1	5	5	5	5.00	Implemented excel spreadsheet
	PI3. Number of best practices achieved	Assists in the drafting/preparing of Memo regarding withholding tax computations (including its supporting documents)	1	100.00%	1	5	5	5	5.00	Disseminated information via OVPAF Memo regarding tax updates and BIR deadlines.
UMFO6: GENERAL ADMINISTRATION SUPPORT SERVICES										
OVPAF MFO2: Financial Services and Management										
ODF MFO2: Accounting Services										

MFO & PAPs	Success Indicators	Tasks Assigned	Target (Jan 1 - Dec 31, 2023)	Percentage (%) of Accomplishme nt as of June 30, 2023	Actual Accomplis hment as of June 30, 2023	Rating				Remarks
						Q¹	E²	T³	A⁴	
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% no complaint	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	133.33%	8	5	5	5	5.00	8 external linkages (COA, GSIS, BIR, PHILHEALTH, PAG-IBIG, LBP, VSUCC and PCC)
	Number of office comm./ documents drafted	Drafts office communications/ documents	100	73.00%	73	5	5	5	5.00	73 office comm./ documents (e.g. Scholars liabilities, etc)
Acctg MFO2: Disbursement / Processing Services										
	No. of entries posted right after the receipt of documents	Posts salaries, honorarium, overtime, stipend, RATA, etc.of regular staff, & Phil. Carabao Center regular staff in the Index of Payments (IP)	30000	55.50%	16,650	5	5	5	5.00	Approx 16,650 financial docs. posted in the individual index
	No. of scholars who pursued Master/Doctorate degrees reinstated but not yet graduated	Drafts total expenses for salaries/allowances, etc.of scholars who pursued Master/Doctorate degrees reinstated but not yet graduated	50	134.00%	67	4	5	5	4.67	67 scholars computed as of May 2023
	No. of vouchers/payrolls journalized right after the receipt of documents	Journalizes vouchers/payrolls	700	60.00%	420	5	5	5	5.00	420 vouchers/ payrolls
	No. of records updated error free	Updates employees records in the database (loans, salary increase,change of status, etc.)	720	110.42%	795	5	4	5	4.67	795 employees record
	No. of staff cleared error free	Countersigns clearance of regular staff	30	160.00%	48	5	5	5	5.00	48 clearances

MFO & PAPs	Success Indicators	Tasks Assigned	Target (Jan 1 - Dec 31, 2023)	Percentage (%) of Accomplishme nt as of June 30, 2023	Actual Accomplis hment as of June 30, 2023	Rating				Remarks
						Q¹	E²	T³	A⁴	
	No. of regular employees computed their withholding tax	Computes withholding tax of regular employees	800	104.38%	835	5	4	5	4.67	835 regular employees including resigned/retired during the period
	No. of Report on Salaries and Allowances Received (ROSA) prepared	Prepares and submits Report on Salaries and Allowances Received (ROSA) within the prescribed time (including its supporting documents)	3	33.33%	1	5	5	5	5.00	1 quarter of ROSA submitted ; 2nd quarter is on-going and will be submitted on July 2023
	No. of staff trained/assisted	Trains/Assists staff (new remittance in-charge especially in annual tax reports, new staff as backpremium in-charge and payroll system deduction in-charge)	2	350.00%	7	5	5	5	5.00	Trained/Assisted 2 staff (remittance / backpremiums), assisted 1 staff (payroll system) and 4 immersion students to their portfolio
	No. of remittance list (backpremium) per fund prepared	Prepares backpremium remittance list to various agencies as supporting documents	2	100.00%	2	5	5	5	5.00	2 backpremium remittance list
	No. of vouchers for backpremium remittances prepared error free (journalizing accounting entry included)	Prepares disbursement vouchers for backpremium remittances to different agencies	2	100.00%	2	5	5	5	5.00	2 backpremium remittances
	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)	2	250.00%	5	5	5	5	5.00	2 backpremium remittances and 3 travel reimbursements
	No. of documents signed as OIC-Head	Signs document as OIC-Head	20	275.00%	55	4	5	5	4.67	55 signed documents
	No. of staff per deduction encoded in the payroll system	Encodes deduction in the payroll system within the prescribed time	400	112.50%	450	5	5	5	5.00	Withholding Tax : average 450 staff encoded


MFO & PAPs	Success Indicators	Tasks Assigned	Target (Jan 1 - Dec 31, 2023)	Percentage (%) of Accomplishme nt as of June 30, 2023	Actual Accomplis hment as of June 30, 2023	Rating				Remarks
						Q¹	E²	T³	A⁴	
	No. of vouchers, RIS and PR's prepared	Prepares vouchers, RIS, PR's and PPMP with supporting documents needed for the office	5	140.00%	7	5	5	5	5.00	Prepared 3 PR, 1 RIS and 3 PPMP
					Total points	103.00	102.00	105.00	103.33	Comments & Recommendations for Development Purpose: To attend trainings for updates on Acctg. System, Income Taxation, and other Taxation updates.
Total Over-all Rating						103.33				
Average Rating						4.92				
Additional points:										
Approved additional points (with copy of approval) :										
Final Rating						4.92				
Adjectival Rating						Outstanding				

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


Evaluated and Rated by:

NICK FREDDY R. BELLO
OIC-Head, Accounting Office
Date: July 4, 2023

Recommending Approval:


LOUELLA C. AMPAC
Director, Financial Management Office
Date: _____

Approved:


DANIEL LESLIE S. TAN
VP for Administration and Finance
Date: _____

PERFORMANCE MONITORING FORM

Name 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/ Recommendations
1	Posts salaries, honorarium, overtime, RATA, etc. of regular staff & Phil. Carabao Center regular staff in the index of payments	Payrolls received, posted and released	per quincena	3 days after receipt	2 days	Very Impressive	Outstanding	
2	Journalizes vouchers/payrolls	Journalized vouchers/payrolls	after posting of payroll/voucher	after posting of payroll/voucher	daily	Very Impressive	Outstanding	
3	Updates employees records in the database (loans, salary increase change of status, etc.)	Updated records in the database	daily	2 days	1 day	Impressive	Very Satisfactory	
4	Computes total expenses (salaries & allowances, etc) for scholars who pursued MS/Doctorate degree reinstated but not yet graduated.	Computed expenses	annually	3 days	1 day	Very Impressive	Outstanding	
5	Computes withholding tax for faculty & staff	Computed withholding taxes	monthly	5 days	3 days	Very Impressive	Outstanding	
6	Prepares and submits Report on Salaries and Allowances Received (ROSA) within the prescribed time (including its supporting documents)	ROSA and its supporting documents submitted to COA	quarterly	5 days after the last month of the quarter	4 days after the last month of the quarter	Very Impressive	Outstanding	
7	Encodes deduction in the payroll system within the prescribed time	Encoded deductions in the payroll system	monthly	4 th day of the month	1 st day of the month	Very Impressive	Outstanding	
8	Countersigns clearance of regular staff	Countersigned clearance	daily	daily	daily	Very Impressive	Outstanding	
9	Prepares voucher, RIS, PR's and PPMP with supporting documents needed for the office	Prepared voucher, PR, RIS, PPMP	Last quarter of the prior year or as need arises	3 days	2 days	Very Impressive	Outstanding	
10	Assists in the preparation, maintenance, retrieval, controlling documents and records							
11	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:



NICK FREDDY R. BELLO
Unit Head



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: Jan. 1-June 30, 2023

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

Position: Admin. Aide VI

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				

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		N/A				
Average Score		4.92				

Overall recommendation : _____



NICK FREDDY R. BELLO
OIC-Head, Accounting Office

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 2023

First Step:

Training on financial management and other accounting functions

Result: Improved Performance

Date: _____ Target Date: _____

Next Step:

Recommend for Promotion

Outcome: _____

Final Step/Recommendation:

Prepared by:



NICK FREDDY R. BELLO
Unit Head

Conforme:



VALERIE Y. VERGIS
Name of Ratee Faculty/Staff