



Annex P

COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

Name of Administrative Staff: **JOCELYN T. CO**

| Particulars (1) | Numerical Rating (2) | Percentage Weight (3) | Equivalent Numerical Rating (2x3) |
|---|-------------------------|--------------------------|---|
| 1. Numerical Rating per IPCR | 4.64 | 70% | 3.25 |
| 2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments | 4.94 | 30% | 1.48 |
| TOTAL NUMERICAL RATING | | | 4.73 |

TOTAL NUMERICAL RATING: 4.73


Add: Additional Approved Points, if any:

TOTAL NUMERICAL RATING: 4.73


FINAL NUMERICAL RATING 4.73

ADJECTIVAL RATING: **OUTSTANDING**


Prepared by:


JOCELYN T. CO
Admin. Aide VI 7/13/22

Reviewed by:


LOUELLA C. AMPAC
Immediate Supervisor 7/13/22

Recommending Approval:


DANIEL LESLIE S. TAN
Vice-Pres. for Admin. and Finance 7/13/22

Approved:


EDGARDO E. TULIN
President 7/14/22

INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **JOCELYN T. CO**, of the **Office of the Director for Financial Management (ODFM)** 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-June, 2022.

JTC
JOCELYN T. CO *7/13/22*
Ratee

Approved: *Louella C. Ampac*
LOUELLA C. AMPAC *7/13/22*
Rater

| MFO & PAPs | Success Indicators | Tasks Assigned | Target January-December , 2022 | Details of Actual Accomplishment January-June, 2022 | Percentage of Accomplishment | Rating | | | | Remarks |
|--|---|---|--|--|------------------------------|----------------|----------------|----------------|----------------|---------|
| | | | | | | Q ¹ | E ² | T ³ | A ⁴ | |
| Financial Documents | Percentage of financial documents approved and released on time | Received, stamps facsimile, encodes & releases all documents in the Finance Office from Accounting Office | 100% (16,284/16,284) vouchers & payrolls (Fund, STF & Trust Funds) | 100% (7,645) vouchers & payrolls (Gen.Fund, STF & Trust Funds) | 94% | 4.0 | 5.0 | 5.0 | 4.67 | |
| | | Received, stamps facsimile, encodes & releases all documents in the Finance Office from Cash Office | 100% (700/700) ACIC | 340 ACIC | 97% | 4.0 | 5.0 | 4.0 | 4.33 | |
| | | | 100% (16,620/16,620) SLCI, NCA utilization, LDDAP | 100% (10,500) SLCI, NCA utilization, LDDAP | 126% | 4.0 | 5.0 | 4.0 | 4.33 | |
| | | | 100% (18,450/18,450)) Checks (Gen.Fund, STF & Trust Funds) | 9,000 checks | 97% | 4.0 | 5.0 | 4.0 | 4.33 | |
| | | | 100% (20/20) personnel clearance | 6 personnel clearance approved | 60% | 5.0 | 5.0 | 5.0 | 5.00 | |
| | | Acted referrals released | 100% (130/130) | 70 referrals | 107% | 5.0 | 5.0 | 4.0 | 4.67 | |
| | Percentage of request received & served within the day upon receipt | Clients served within the day | 100% (2,400/2,400) clients served (10 clients/day) | 1,580 clients served (10 clients/day) | 131% | 5.0 | 5.0 | 5.0 | 5.00 | |
| | | Customer-Friendly Frontline Service | No Complaint | Zero Complaint | 100% | 5.0 | 5.0 | 5.0 | 5.00 | |
| Administrative and Support Services Management | Percentage of Financial Reports/Budget related documents reproduced | Distributed SARO/NCA/GARO to concerned offices | 100% (127/127) cps reproduced and distributed | 42 cps reproduced and distributed | 58% | 4.0 | 5.0 | 4.0 | 4.33 | |

| MFO & PAPs | Success Indicators | Tasks Assigned | Target January-December , 2022 | Details of Actual Accomplishment January-June, 2022 | Percentage of Accomplishment | Rating | | | | Remarks |
|--|--|--|---|--|------------------------------|---|------|------|-------|---------|
| | | | | | | Q¹ | E² | T³ | A⁴ | |
| Administrative and Support Services Management | Percentage of Financial Reports/Budget related documents reproduced | Budgetary Proposals (Utilization of Income) for BOR Approval | 100% (15/15) sets submitted for BOR approval | 8 sets submitted for BOR approval | 114% | 4.0 | 5.0 | 4.0 | 4.33 | |
| | Percentage of Financial Reports/Budget related documents reproduced | Collates, sorts, reproduces, binds budgetary reports/requirements for Congress, Senate , DBM, PASUC and CHED | 100% NEP (40 /40) sets of FY 2023 budgetary reports submitted | 100% (10 sets/10 sets) of FY 2023 budgetary reports submitted | 50% | 5.0 | 5.0 | 5.0 | 5.00 | |
| | Percentage of documents/vouchers prepared for processing and reports encoded for on line submission to DBM | Drafted communications, prepared documents for reimbursements, liquidations, OIC, transmittal letters and encoded reports for online submission to DBM | 100% (150/150) documents prepared and submitted | 104 documents prepared and submitted | 138% | 5.0 | 5.0 | 4.0 | 4.67 | |
| Total Over-all Rating | | | | | | 54.0 | 60.0 | 53.0 | 55.67 | |
| Average Rating (Total Over-all rating divided no. of task assigned)) | | | | 4.64 | | Comments & Recommendations for Development Purpose: Needs training/seminar to uplift more interest and updates related to her assigned task. | | | | |
| Additional Points: | | | | | | | | | | |
| Punctuality | | | | | | | | | | |
| Approved Additional points (with copy of approval) | | | | | | | | | | |
| FINAL RATING | | | | 4.64 | | | | | | |
| ADJECTIVAL RATING | | | | | | | | | | |

Evaluated & Rated by:



LOUELLA C. AMPAC

Financial Management Director

Date: 7/13/22

Recommending Approval:



LOUELLA C. AMPAC

Financial Management Director

Date: 7/13/22

Approved:



DANIEL LESLIE S. TAN

VP for Admin. and Finance

Date: 7/13/22

1 - Quality

2 - Efficiency

3 - Timeliness

4 - Average

TRACKING TOOL FOR MONITORING TARGETS
January - June, 2022

| Major Final Output/Performance Indicator | TASK | ASSIGNED TO | DURATION | TASK STATUS | | | | REMARKS |
|--|--|---|--------------------|-------------|----------|----------|----------|---------|
| | | | | 1st Week | 2nd Week | 3rd Week | 4th Week | |
| MFO 1. Administrative and Support Services Management | | | | | | | | |
| PI 1. Efficient & Customers-Friendly Frontline Service | 1 Clients served within the day | Louella C. Ampac Jocelyn T. Co | January-June, 2022 | X | X | X | X | |
| PI 2. Percentage of Financial Documents (Vouchers, Payrolls, Checks, ACIC, LDDAP, student requests re: clearance and withdrawal of deposits) received, approved and released | 1 Receives, stamps facsimile, encodes, approves and releases all documents in the Office of the Director for Financial Management Office | Louella C. Ampac Jocelyn T. Co | January-June, 2022 | X | X | X | X | |
| PI 3. Number of external linkages for improved financial management development/maintained | 1 Coordinated with different offices such as COA, DBM, BOT, LBP, NEDA, CHED, BIR, Philhealth, HDMF and GSIS | Louella C. Ampac Jocelyn T. Co Nick Freddy R. Bello | January-June, 2022 | X | X | X | X | |
| MFO 2. Effective and responsive annual budget prepared and submitted within allowable period | | | | | | | | |
| PI 1. Percentage availability of detailed plans and budget of proposed PAPs for inclusion in the following budget year in accordance with approved Work and and Financial Plan | 1 Prepares, consolidates, approves reports for submission within mandated time | Dr. DOFerraren, ODFM, OP, Budget Officers, (Main & External), College Deans, GSD | January-June, 2022 | X | X | X | X | |
| PI 2. Percentage of Annual Budget Proposal (GF and IGF) with supporting Budget Preparation Forms submitted to different regulatory committees and agencies | 1 Prepares, consolidates, approves reports for submission within mandated time | OP, ODFM, OVPAF, ODAHRD, OVPPRGAS, USSO, PRPEO, Res. & Ext., College Deans and Budget Officers (Main and External Campus) | January-June, 2022 | X | X | X | X | |
| MFO 3. Efficient Budget Utilization of funds within prescribed time | | | | | | | | |
| PI 1. Percentage of Budget obligated and liquidated | 1 Processed the different vouchers/payroll including Purchase Order for obligation and monitors the payments made | Dr. DLSTan Louella C. Ampac Budget Office | January-June, 2022 | X | X | X | X | |

TRACKING TOOL FOR MONITORING TARGETS
January - June, 2022

| Major Final Output/Performance Indicator | TASK | ASSIGNED TO | DURATION | TASK STATUS | | | | REMARKS |
|---|--|--|--------------------|-------------|----------|----------|----------|---|
| | | | | 1st Week | 2nd Week | 3rd Week | 4th Week | |
| MFO 4. Timely and error free financial and budgetary reports | | | | | | | | |
| PI 1. No. of monthly, quarterly and year-end financial reports prepared, consolidated, approved and submitted to COA/DBM within mandated time for all funds, error free | 1 Prepares, consolidates, approves reports for submission within mandated time | Louella C. Ampac, Alicia M. Flores, Nick Freddy R. Bello and Satellite Campus Budget Officers and Accountant/Bookkeepers | January-June, 2022 | X | X | X | X | |
| MFO 5. Innovation and Best Practices Services | | | | | | | | |
| PI 1. Number of operation manuals prepared, developed and approved | 1 Prepares operation manuals | Louella C. Ampac Alicia M. Flores Nick Freddy R. Bello | January-June, 2022 | X | X | X | X | Revised 3 Quality Procedure Manuals (PM-ACT-01, PM-ACT-02 and PM-ACT-03) |
| PI 2. Number of innovations to improve university operations | 1 Recommends innovations to improve university operations | Louella C. Ampac Alicia M. Flores Nick Freddy R. Bello | January-June, 2022 | X | X | X | X | ODFM: sending of electronic memorandum including guidelines. Budget Office: on-going development of Financial Management System. Acctg. Office: google drive for back-up file |
| PI 3. Number of Best Practices achieved | 1 Recommends best practices for smooth operation of services | Louella C. Ampac Alicia M. Flores Nick Freddy R. Bello | January-June, 2022 | X | X | X | X | ODFM: fast/on time processing of documents. Budget Office: sending balances to different offices and centers. Acctg. Office: timely submission of reports |

Prepared by:

Louella C. Ampac
LOUELLA C. AMPAC
Financial Management Director

PERFORMANCE MONITORING FORM

January -June, 2022

Name of Employee: JOCELYN T. CO

| 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 | Receiving, encoding and releasing of documents | Documents received, encoded and released | Various dates from Jan.-June, 2022 | within Jan.-June, 2022 | within Jan.-June, 2022 | very impressive | outstanding | the documents were released utmost thirty minutes after receipt |
| 2 | Reproduction of reports/budget related documents | Reproduced reports and budget related documents | Various dates from Jan.-June, 2022 | within Jan.-June, 2022 | within Jan.-June, 2022 | very impressive | outstanding | met the deadline set by required agencies |
| 3 | Collates, sorts, reproduces, binds budgetary reports/requirements for Congress, Senate, DBM, PASUC and CHED | Collated, sorted, reproduced, bound budgetary reports/requirements and submitted to different agencies | Various dates from Jan.-June, 2022 | within Jan.-June, 2022 | within Jan.-June, 2022 | very impressive | outstanding | met the deadline set by required agencies |
| 4 | Draft communications/proposals and prepares document for reimbursements, liquidations, OIC and transmittal letters | Drafted communications/proposals and prepared documents for processing | Various dates from Jan.-June, 2022 | within Jan.-June, 2022 | within Jan.-June, 2022 | very impressive | outstanding | communications submitted/forwarded utmost one day after assigned task |
| 5 | Consolidates report of the CSI's | Consolidated CSI's report | Various dates from Jan.-June, 2022 | within Jan.-June, 2022 | within Jan.-June, 2022 | very impressive | outstanding | submitted reports within mandated time |

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

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

Prepared by:

Louella C. Ampac
LOUELLA C. AMPAC
 Financial Management Director



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: January – June, 2022

Name of Staff: JOCELYN T. CO

Position: Administrative 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 | | | | | | 25 |
| Average Score | | | | | | 4.94 |

Overall recommendation : _____

Louella C. Ampac
LOUELLA C. AMPAC *r/k/r*
 Financial Management Director

PERFORMANCE MONITORING & COACHING JOURNAL
January - June, 2022

| | | |
|---|-----|---------------------------------|
| x | 1st | Q U A R T E R |
| x | 2nd | |
| | 3rd | |
| | 4th | |

Name of Office: Office of the Director for Financial Management

Head of Office: LOUELLA C. AMPAC

Name of Staff: JOCELYN T. CO Signature 

| Activity Monitoring | MECHANISM | | | | Remarks |
|---|------------|-------|------|-----------------------|---------|
| | Meeting | | Memo | Others (Pls. specify) | |
| | One-on-One | Group | | | |
| <u>Monitoring</u> 1 Receiving, encoding, stamps facsimile and releasing of documents with corresponding initials and date in relation to ISO 2 Indicating of control number in every communication from the office | X | | | | |
| <u>Coaching</u> 1 To encode the bar codes of documents for monitoring purposes | X | | | | |

Note: Please indicate the date in the appropriated box when the monitoring was conducted.

Conducted by:


LOUELLA C. AMPAC
Head of Office

Noted by:


DANIEL LESLIE S. TAN
Vice-Pres. for Admin. and Finance

EMPLOYEE DEVELOPMENT PLAN

Name of Employee : **JOCELYN T. CO**

Performance Rating: **Outstanding**

Signature: 

Aim: To maximize the productivity potential of our Clerk.

Proposed Interventions to Improve Performance:

Date: June 1, 2022 Target Date: April 29, 2022

First Step:

Collate 2023 requirements for Budget Proposal submitted to DBM, Congress and Senate including preparation of some BP Forms

Result:

On time submission of Proposals for New Projects to the different requesting offices.

Date: April 29, 2022 Target Date: June 30, 2022

Next Step:



Preparation of BOR Proposal with separate file name for each proposal.

Outcome: Easy Retrieval of e-copy of BOR Proposals

Final Step/Recommendation:

Recommend to attend training for clerks.

Prepared by:


LOUELLA C. AMPAC 
Financial Management Director