



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	4.93	70%	3.45
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	4.92	30%	1.48
TOTAL NUMERICAL RATING			4.93

TOTAL NUMERICAL RATING: 4.93


Add: Additional Approved Points, if any:

TOTAL NUMERICAL RATING: 4.93

FINAL NUMERICAL RATING 4.93

ADJECTIVAL RATING: **OUTSTANDING**

Prepared by:


VALERIE Y. VERGIS
Administrative Aide IV

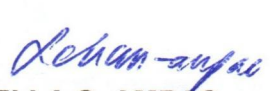
10/12/2020

Reviewed by:


ERLINDA S. ESGUERRA
Head, Accounting Office

10/12/2020

Recommending Approval:


LOUELLA C. AMPAC
Director, Finance and Management Office

10/12/2020

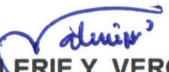
Approved:



REMBERTO A. PATINDOL
Vice President, Administration and Finance Office

10/13/2020

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, 2020**.


VALERIE Y. VERGIS
 Ratee
 Date: 10/12/2020


 Approved: **ERLINDA S. ESGUERRA**
 Head of Unit
 Date: 10/12/2020

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

MFO & PAPs	Success Indicators	Tasks Assigned	Target	Percentage (%) of Accomplishment as of June 30, 2020	Actual Accomplishment	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%	1	5	5	5	5.00	1 Quality Procedure prepared/ revised
	No. of documents coded based on ISO 9001:2015 standard forms	Codes documents	150	120%	180	5	5	5	5.00	180 coded documents
	No. of internal and external documents posted/monitored	Posts/monitors internal and external documents	250	147%	368	5	5	5	5.00	368 posted/monitored internal and external documents
Acctg MFO2: Innovation & best practices services										
	PI1. Number of operation manual prepared, developed and approved.	Assists	1	50%	on process	4	4	4	4.00	
	PI2. Number of innovation for improved university operations	Assists	1	100%	1	5	5	5	5.00	use of ip messenger in informing departments for the returned documents with defficiencies
	PI3. Number of best practices achieved		1	100%	1	5	5	5	5.00	special lane for student claims

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%	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%	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	50	136%	68	5	5	5	5.00	68 office communications/ documents (e.g. Work Schedule, SWOTAR, OPCR, IPCR and its supporting documents, Work and Financial Plan, etc)


Acctg MFO2: Disbursement / Processing Services

	No. of summary from payroll encoded error free	Encodes summary from payroll error free	460	147%	675	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)	32,300	154%	49,670	5	5	4	4.67	49,670 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%	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	100%	6	5	5	5	5.00	6 fund types (101 GF, 101 T, 164 STF, 161 IGP, PCC, Philhealth Prof. Fees)
	No. of remittance list per fund prepared within mandated time	Prepares monthly consolidated remittance list to various agencies as supporting documents	320	120%	385	5	5	5	5.00	385 monthly consolidated remittance list


	No. of vouchers for remittances prepared error free (journalizing accounting entry included)	Prepares disbursement vouchers for remittances to different agencies	320	130%	415	5	5	5	5.00	415 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)	170	153%	260	5	5	5	5.00	260 Obligation Request and Status (ORS) or Budget Utilization Request and Status (BURS)
	No. of BIR quarterly report prepared	Prepares BIR quarterly report	2	100%	2	5	5	5	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)	1125	120%	1,350	5	5	5	5.00	1,350 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	120%	96	5	5	5	5.00	Approx 15 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:	94	94	93	93.67	Comments & Recommendations for Development Purpose: To attend training for updates on Acctg. System and Records Management
Total Over-all Rating						93.67				
Average Rating						4.93				
Additional points:										
Approved additional points (with copy of approval) :										
Final Rating						4.93				
Adiectival Rating						Outstanding				

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

Evaluated and Rated by:


ERLINDA S. ESGUERRA
 Head, Accounting Office
 Date: 10/12/2020

Recommending Approval:


LOUELLA C. AMPAC
 Director, Finance Office
 Date: 10/12/2020

Approved:


REMBERTO A. PATINDOL
 VP for Administration and Finance
 Date: 10/13/2020

Exhibit I

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/ 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

10/12/2020



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: **January 1 – June 30, 2020**

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				

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						
Average Score		4.92				

Overall recommendation : _____


 10/12/2020
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: November. 2020

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:

 10/12/2020
ERLINDA S. ESGUERRA
Unit Head

Conforme:

 10/12/2020
VALERIE Y. VERGIS
Name of Ratee Faculty/Staff