



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 1/23/23

Reviewed by:


LOUELLA C. AMPAC
Immediate Supervisor 1/23/23

Recommending Approval:


DANIEL LESLIE S. TAN
Vice-Pres. for Admin. and Finance 1/23/23

Approved:


EDGARDO E. TULIN
President 1/23/23

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 July-December, 2022.

JOCELYN T. CO

Ratee

Approved:

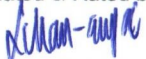
LOUELLA C. AMPAC

Rater


MFO & PAPs	Success Indicators	Tasks Assigned	Target January-December, 2022	Details of Actual Accomplishment July-December, 2022	Percentage of Accomplish ment as of December 31, 2022	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
Financial Documents	Percentage of financial documents approved and released on time	Received, stamps and countersigned facsimile signature, encodes the tracking number & releases all documents in the Finance Office from Accounting Office	100% (16,284/16,284) vouchers & payrolls	8,562 vouchers & payrolls	105%	5.0	5.0	5.0	5.00	
		Received, stamps facsimile, encodes & releases all documents in the Finance Office from Cash Office	100% (700/700)	375 ACIC	107%	4.0	5.0	4.0	4.33	
			100% (16,620/16,620) SLCI, NCA utilization, LDDAP	10,167 SLCI, NCA utilization, LDDAP	122%	4.0	5.0	4.0	4.33	
			100% (18,450/18,450) checks	9,868 checks	121%	4.0	5.0	4.0	4.33	
		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)	1,300 clients served (10 clients/day)	108%	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% (72/72) cps reproduced and distributed to concerned offices	42 cps reproduced and distributed to concerned offices	116%	4.0	5.0	5.0	4.67	
		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	

MFO & PAPs	Success Indicators	Tasks Assigned	Target January-December, 2022	Details of Actual Accomplishment July-December, 2022	of Accomplish ment as of December 31, 2022	Q ¹	E ²	T ³	A ⁴	Remarks
Administrative and Support Services Management	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) of FY 2023 budgetary reports submitted	25 sets of FY 2023 budgetary reports submitted	100%	5.0	5.0	5.0	5.00	
	Percentage of documents/vouchers prepared for processing	Drafted communications, prepared documents for reimbursements, liquidations, OIC and transmittal letters and encoded reports for online submission to DBM	100% (150/150) documents prepared, encoded and submitted	104 documents prepared, encoded and submitted	138%	5.0	4.0	4.0	4.33	
Total Over-all Rating						50.0	54.0	49.0	51.00	
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:  1/18/23

Recommending Approval:




LOUELLA C. AMPAC
Financial Management Director

Date:  1/18/23

Approved:



DANIEL LESLIE S. TAN
VP for Admin. and Finance

Date:  1/18/23

1 - Quality

2 - Efficiency

3 - Timeliness

4 - Average

TRACKING TOOL FOR MONITORING TARGETS

July - December , 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 Mynche Darleen Dumaguing	July-December, 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 Mynche Darleen Dumaguing	July-December, 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 Mynche Darleen Dumaguing Nick Freddy R. Bello	July-December, 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	July-December, 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)	July-December, 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	July-December, 2022	X	X	X	X	

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	July-December, 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	July-December, 2022	X	X	X	X	on process
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	July-December, 2022	X	X	X	X	ODFM: sending of electronic memorandum including guidelines. Budget Office: encoding of PRs in the BAOM and on going development of Financial Management System. Acctg. Office: Monthly reconciliation with External Campuses
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	July-December, 2022	X	X	X	X	ODFM: fast/on time processing of documents. Budget Office: informs the different offices of their balances. Acctg. Office: Special lane for withdrawal of Student Deposit/Refund

Prepared by: *Louella C. Ampac*

LOUELLA C. AMPAC *1/4/22*
Financial Management Director

PERFORMANCE MONITORING FORM

July - December, 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*	Assessment of Overall Output**	Remarks/Recommendation
1	Receiving, encoding and releasing of documents	Documents received, encoded and released	Various dates from July - Dec. 2021	within July-Dec. 2021	within July-Dec. 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 July - Dec. 2022	within July-Dec. 2022	within July-Dec. 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 July - Dec. 2022	within July-Dec. 2022	within July-Dec. 2022	Very impressive	Outstanding	met the deadline set by required agencies
4	Draft communications/proposals and prepares documents for reimbursements, liquidations, OIC and transmittal letters	Various dates from July - Dec. 2022	within July-Dec. 2022	within July-Dec. 2022	within July-Dec. 2022	Impressive	Very Satisfactory	communications submitted/forwarded almost one day after assigned task
5	Consolidate reports of the CSI's	Consolidated CSI's reports	Various dates from July - Dec. 2022	within July-Dec. 2022	within July-Dec. 2022	Impressive	Very Satisfactory	submitted reports within mandated time

* Either very impressive, impressive, needs improvement, poor, very poor
 ** Outstanding, very satisfactory, satisfactory, unsatisfactory, poor

Prepared by:

JOCELYN T. CO
 LOUELLA C. AMPAC
 Financial Management Director



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: July - December, 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 : _____ deserves a promotion


LOUELLA C. AMPAC
 Financial Management Director

PERFORMANCE MONITORING & COACHING JOURNAL
July - December, 2022

	1st	Q U A R T E R
	2nd	
X	3rd	
X	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	X				
2 Indicating of control number in every communication from the office					
<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 1/4/23
Head of Office

Noted by:


DANIEL LESLIE S. TAN 1/4/23
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: July 1, 2022 **Target Date:** September 30, 2022

First Step:

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

Result:

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

Date: September 30, 2022 **Target Date:** December 31, 2022

Next Step:

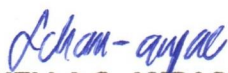
Preparation of BOR Proposal with separate file name for each proposal.

Outcome: Easy Retrieval of e-copy of BOR Proposals

Final Step/Recommendation:

Recommend to attend training for clerks.

Prepared by:


LOUELLA C. AMPAC 1/4/23
Financial Management Director