







Performance Appraisal Form Printing Options
Date: July 22, 2004

Web site Address: <http://www.hawaii.edu/ohr/docs/forms/>

or go to OHR home page www.hawaii.edu/ohr and click on HR Documents section / HR Forms / Performance Appraisal System.

If you do not have any training in the Mail/Merge feature of WORD, go to Option 2 and use the “Manual Data entry via WORD form filling option”.

?  University of Hawai'i MS/WORD Templates
Instructions
?  Printing PAS Forms
?  Completing the Appraisal Forms
Option 1: Print complete PAS forms using Excel file and WORD Mail/Merge option: ? Form Template for BU 2 and 4 (all pages) ? Form Template for BU 1,3,9 and 63 (all pages)
Option 2: Print PAS form - Page 1 only (choose one of the following methods): ? Using Excel file and WORD Mail/Merge option ? Manual Data entry via WORD form filling option Standard pages to be attached to individual Page 1's printed above: ?  For BU 2,4 (pages 2-3) ?  For BU 1,3,9 and 63 (pages 2-3)
Micellaneous forms: ?  Supervisor's Discussion Notes

Description of above links:

Option 1: Print complete PAS forms using Excel File and WORD Mail/Merge option:

This option is used to print PAS forms for all employees listed in the Excel Data file received from OHR. This option prints all pages of the form and inserts data on all pages of the form in the appropriate fields

1. Receive Excel data file from OHR and save file to a directory on your workstation. Remember the location of this file.
super.xls = BU 2 and 4 employees
worker.xls = BU 1,3,9 and 63 employees

2. Download PAS form template from the web for specific BU employees and save template to a directory on your workstation. Right click on the appropriate link. Press the Save button and remember the location of this file. Press the Close button after the download is completed.
 - a. For BU 2 and 4 (all pages) prints the complete PAS form for BU 2 and 4 employees in your excel data file (Filename: **uh528.doc**)
 - b. For BU 1,3,9 and 63 (all pages) prints the complete PAS form for BU 1,3,9 and 63 employees in your excel data file (Filename: **uh527.doc**)
3. Follow MS/WORD Mail Merge instructions to merge data received in step 1 with form templates received in step 2.
4. If you overwrite the PAS template when saving, you may obtain a new copy of the template from the web site address at the top of page 1.

Option 2: Print PAS form – Page 1 only (choose method A or B below):

If you do not have any training in the Mail/Merge feature of WORD, start at Step B below - “Manual Data entry via WORD form filling option”.

A. Using Excel File (Filename: uh526.doc) and MS Mail/Merge feature

If the complete form (all 3 pages) for each employee will not be printed as indicated in Option 1, use this option to download the page 1 template only of the PAS form for all BU employees using the Excel file. Subsequent pages may be photocopied ahead of time and attached to this front page (see Section C below). Mass printing of the subsequent pages means no employee specific data will be printed on these subsequent pages.

1. Receive Excel data file from OHR and save file to a directory on your workstation. Remember the location of this file.
2. Download PAS form template
3. Follow MS/WORD Mail Merge instructions to merge data received in Option 1 Step 1 with the form template received in Option 2 step A.

B. Manual Data entry via WORD form filling feature (filename: hrd526.doc)

This option allows you to manually input the Page 1 information for each employee on the Excel file using the MS/WORD form filling feature.

1. Download the template in “Option 2: Using Excel file and Mail/Merge option” (Filename: uh526.doc) to determine the location of where the Excel data should be entered on the PAS form. The form fields are denoted with “<<” “>>” such as «NAME». These form fields names match with the Excel file headings.

NOTE: There will be additional fields (ie, SM_E, SM_EVAL, etc.) on the Excel file that do not correspond with any fields on the template. Ignore these fields. Only work with the fields that match between the Excel file and the template.

2. Use the Excel data file received from OHR to enter the data in the proper location on the form.
3. Place cursor in data field according to the template in Option 2 Step B.1 (filename: uh526.doc) above and type the Excel data in the field.
4. Print document before entering next employee information. Subsequent pages may be photocopied ahead of time and attached to this front page (see Section C below). Mass printing of the subsequent pages means no employee specific data will be printed on the subsequent pages.

C. Subsequent pages to be attached to Page 1 above:

There are 2 options available – to print the subsequent pages (pages 2-3 only) without employee data printed on the form or with employee data printed on the form.

Option 1: Print the subsequent pages of the PAS form without data

The files in this section are Adobe/Acrobat files and can be printed, photocopied in mass and attached to page 1 printed in Option 2 Step A or Option 2 Step B

- a. For BU 2 and 4 employees (pages 2-3 only) (filename: uh528.pdf)
- b. For BU 1,3,9 and 63 (pages 2-3 only) (filename: uh527.pdf)

Option 2: Print the subsequent pages of the PAS form with manually filled data

The files in this section are Adobe/Acrobat form fillable files and may be used in conjunction with the page 1 printed in Step B above. The Name, UH number and Appraisal periods on these documents can be manually filled based on the Excel file provided and attached to Page 1 printed in Option 2 Step A or Option 2 Step B above. These are the only 3 fields that are form fillable on these forms.

- a. For BU 2 and 4 employees (pages 2-3 only) (filename: uh528.pdf)
- b. For BU 1,3,9 and 63 (pages 2-3 only) (filename: uh527.pdf)

D. Optional: Supervisor's Discussion Notes (filename: uh529.pdf)

You may use the form filling capability of Adobe/Acrobat to fill in the name, UH Number and Appraisal periods onto these discussion note forms. These are the 3 fields are the only form fillable fields on the forms.