Online Performance Appraisal System
90 Day Evaluation Period (for internal transfers)
Completing a 90 Day Evaluation Letter or Memo
You can use a memo or letter (custom document) instead of the standard 90 Day Evaluation Form to communicate performance goals/expectations to the newly hired staff member. Once you complete the document on your computer it must be uploaded in the Online Performance Appraisal System using the steps outlined in the following slides.

Your memo or letter should include:

- Specific performance goals/expectations for the 90 Day Evaluation Period. Goals should be **Specific**, **Measurable**, **Achievable**, **Realistic** and include a **Timeframe for Completion**.
- One to five competencies vital to the position that staff member must work on during the 90 Day Period. See competency list at: https://www.hr.upenn.edu/myhr/payandperform/appraisal/performance
- Establishing competencies is OPTIONAL.
Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
### Home Screen

#### Performance Appraisal Management

**Appraisal Review Year: 2015**
The current appraisal year being viewed is the 2015 fiscal year, which is the period from July 1, 2014 through June 30, 2015.

**My Current Appraisals**
- Draft, Edit, Complete or View Own Self-Appraisal
- View Own Annual Performance Appraisal

**My Staff Annual Performance Appraisals**
Draft, Edit, Complete, View Annual Performance Appraisals for Direct Reports

**My Staff Intro Review Module**
Draft, Edit, Complete, View Intro Review for Newly Hired Staff Member

**My Staff 90 Day Evaluation**
Draft, Edit, Complete or View 90 Day Evaluation for Internal Transfers

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**My Appraisals**
- Appraisal History
- My Activity Log

**My Staff**
- Completed Appraisal History
- My Activity Log

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**My Self-Appraisal**
You should complete a self-appraisal for the 2015 review year. Our records indicate that you have already completed your self-appraisal and have forwarded it to your manager/supervisor. You may only view your self-appraisal from this point forward.

**My Annual Performance Appraisal**
Your manager/supervisor has completed your performance appraisal and you have already acknowledged receipt.

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**My Staff- Annual Performance Appraisals**
Our records indicate that you are the manager/supervisor of the staff listed below, or that a staff member has been completed, reviewed, and signed. The "Appraisal Required" column indicates if the staff member has been assessed. The "Self-Appraisal" column indicates if the self-appraisal for a staff member has been completed, reviewed, and approved. The "Appraisal Due" column indicates the date the appraisal is due.

**Appraisals for the next review year can now be created in Draft status. Available on the Details page.**

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**My Staff- Introductory Review Period**
Your staff members below are new hires who are in their Introductory Review Period.

**My Staff- 90 Day Evaluation**
Your staff members below are internal hires who have moved to a new position within the same department, or have moved to a different department, and are in their 90 Day Evaluation.
Click "Details" by staff member's name to start 90 Day Evaluation.

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td></td>
<td>COORDINATOR PROGRAM</td>
<td>Complete - Not Signed</td>
</tr>
<tr>
<td>Details</td>
<td></td>
<td></td>
<td>ADMIN COORDINATOR</td>
<td>Not Started</td>
</tr>
</tbody>
</table>
Click "Start 90-Day Evaluation."
Select Type of Review – Upload Custom Document

Add/Update 90-Day Evaluation Period Review

Performance Goals for 90-Day Evaluation Period for Interns

Please choose the type of 90-Day Evaluation Period Review you would like to upload:

- **Standard 90-Day Evaluation Period Review:** This option allows you to upload the evaluation criteria used to assess intern performance during the 90-day period.

- **Upload Custom Document:** This option allows you to upload a customized document outlining the specific goals and competencies for the 90-Day Evaluation Period.

Select "Upload Custom Document" to upload a memo or letter. The memo or letter should outline the performance goals and competencies, if any, for the 90 Day Evaluation Period.

The custom document should include the performance expectations the staff member has for the 90-Day Evaluation Period. These expectations should describe the goals and competencies to be achieved during this period. See more guidelines at the Penn HR Website. Before the end of the 90-Day Period you can use the custom document to describe performance.
Custom Document Upload for 90-Day Evaluation Period Review (Establishing Goals/Competencies)

Staff Member: [Name]
Status: Incomplete and No Staff Member Access
Last Updated On: 10/9/2015 9:35:20 AM  Last Updated By: [Name]

Upload Document
You have elected to add a custom attachment/memo/letter for the staff member. To overwrite the "Upload Document" button, simply delete the attachment and upload a new version.

<table>
<thead>
<tr>
<th>File Name</th>
<th>File Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No records to display.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select "Upload Document."
Click "Select" to find and select document on your computer. (Document must be closed on your computer before selecting it.)

You must type in brief description of document in "Attachment Description" field.

Then click "Save Attachment."
File name and description of uploaded document will appear. You can delete if you saved the wrong document. If you saved the correct document, select "Next Step."
Saving the goals in draft form will allow you to make changes to the goals after discussing them with the staff member.
### 90-Day Evaluation

**My Staff - 90-Day Evaluation**

Your staff members below are internal hires who have moved to other departments, and are in their 90-Day Evaluation period.

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
<th>Job Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td></td>
<td>COORDINATOR PROGRAM</td>
<td>Complete - Not Signed</td>
</tr>
<tr>
<td>Details</td>
<td></td>
<td></td>
<td>ADMIN COORDINATOR</td>
<td>Establish Goals Incomplete - No Staff Member Access</td>
</tr>
</tbody>
</table>

**Status of document is updated on home page.**

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[Image: Penn Human Resources logo]
Once you have reviewed the draft goals/expectations with the staff member, you need to re-enter the system to finalize the goals/expectations.
Finalize Goals – Custom Document

Select "Continue/Edit 90-Day Evaluation."

Appraisal Review Year: 2015
The current appraisal year being viewed is the 2015 fiscal year.

Current Appraisals (2015)

Staff Member's 90-Day Evaluation
This staff member was an internal hire and is in the 90-Day Evaluation Period.

Continue/Edit 90-Day Evaluation
Finalize Goals – Custom Document

Add/Update 90-Day Evaluation Period Review

Performance Goals for 90-Day Evaluation Period for Internal Hires (Penn staff who have transferred from a region/center outside Penn to Penn) 

Please choose the type of 90-Day Evaluation Period Review you would like to use and then click “Next Step”:

- **Standard 90-Day Evaluation Period Review:** The application will walk you through a series of questions to help you establish performance goals and learning plans for the remainder of the 90-Day Period. Enter text directly into the application.

- **Upload Custom Document:** This option allows you to put the performance goals and learning plans for the remainder of the 90-Day Period in a file attachment.

  The custom document should include the performance expectations the staff member has for the 90-Day Evaluation Period. These goals may be focused on during this period. See more guidelines at the [Penn HR Website](https://hr.penn.edu). Before the end of the 90-Day Period you can use the custom document to document progress.

**Appraisal Due Date:**

- 10/5/2015

[Next Step]
If you want to change the existing 90 Day Evaluation performance goals memo or letter, delete the document by clicking "Delete." Then upload a new document.

If you do not want to change the existing 90 Day Evaluation performance goals memo or letter, click "Next Step."
After discussing the performance expectations with the staff member, make any needed changes to the document, upload the revised document, and finalize the performance goals/expectations by selecting “Performance Goals Finalized” on the “Finalize Performance Goals Screen.” The staff member cannot sign the Performance Goals until the supervisor marks them “finalized.”
Recalling Completed Goals – Custom Document

- If you want to change the finalized goals document back to draft form, you can recall the document if the staff member has not signed it. Follow the steps below. (If the staff member signed the document, contact your HR professional.)

- Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
- Go to the 90 Day Evaluation section and click “Details” by the staff member’s name
- Click “View Evaluation”
- Click “Recall the Review”
Recalling Completed Goals – Custom Document

View 90-Day Evaluation Period Review (Establishing Goals)

- **Staff Member:**
  - **Status:** Complete Not Signed
  - **ID#:**
  - **Due Date:** 10/26/2015

- **Last Updated On:** 10/22/2015 5:39:58 PM
  - **by:**

- **Recall the Review:** The staff member has not yet signed this review. You may recall the review and place it back in draft mode.

- **Close Out Review:** Mark this review as complete/closed without the signature of the staff member.

**Attachments**

<table>
<thead>
<tr>
<th>File Name</th>
<th>File Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jon Doe 90 Day Performance Goals.docx</td>
<td>12,696</td>
<td>Jon Doe 90 Day Performance Goals</td>
</tr>
</tbody>
</table>

**Supervisor Signature**

Signed by AYLOR, SHARON M on 10/22/2015 5:39:58 PM.

**Staff Member Signature**

The review has not yet been signed by the staff member.

**Comments:**

There are no staff member comments at this time. Comments may be added by the staff member when the review is signed.
Step 2: Completing the 90 Day Evaluation Review – Custom Document

- **Prior** to the end of the staff member’s 90 Day Evaluation Period, you must complete the 90 Day Evaluation Period Review and discuss it with the staff member.

- You can continue to use a memo or letter format (custom document) to complete the review. The memo or letter must then be uploaded in the Online Performance Appraisal System using the steps outlined in the following slides.

- If you want to place the staff member on probation, or any other step in the progressive disciplinary process, you must consult with your HR professional, before communicating this decision to the staff member.
Prepare the 90 Day Evaluation Review Document

- Draft your 90 Day Evaluation Review letter/memo using below template:
  - Describe performance results, including supporting examples, for each goal established
  - Describe how the staff member demonstrated each competency established, if any, including supporting examples
  - Establish performance goals for the remainder of the appraisal cycle
  - (Optional) Establish competencies (1 – 5) and/or professional development/learning goals for the remainder of the cycle

- Save and close the document on your computer.
Decide on Overall Rating and Any Subsequent Action

- You should decide whether the staff member’s overall performance is:
  - Fully acceptable and desired results were achieved;
  - Meeting some but not all expectations and improvement is needed in some areas; or
  - Below acceptable level for time in position.
- You will enter the Overall Rating in the Online Performance Appraisal System when you upload your memo or letter.

- You should decide whether or not to place the staff member on probation or another step in the progressive disciplinary process***
  
  ***Consult with your HR professional before communicating this decision to the staff member.
Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
Close Out Completed Goals – Custom Document

- Note: Before completing the 90 Day Evaluation Review, you must have marked the performance goals “finalized” in the system and the staff member must have electronically signed the goals in the system.

- If the staff member has not signed the goals you can:
  - Have the staff member sign the completed goals via the Online System, OR
  - You can re-enter the system and close out the goals document before drafting the 90 Day Evaluation Review by following the steps below:
    - Access the Online System, using your PennKey and password at https://portal.hr.upenn.edu/
    - Go to the 90 Day Evaluation section and click “Details” by the staff member’s name
    - Click “View Evaluation”
    - Click “Close Out Review”
Close Out Completed Goals – Custom Document

View 90-Day Evaluation Period Review (Establishing Goals)

Staff Member:
Status: Complete Not Signed  ID#:  Due Date: 10/26/2015
Last Updated On: 10/22/2015 5:39:58 PM  by:

- Recall the Review: The staff member has not yet signed this review. You may recall the review and place it back in draft mode.
- Close Out Review: Mark this review as complete/closed without the signature of the staff member.

Attachments

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</tr>
</tbody>
</table>

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 5:39:58 PM.

Staff Member Signature
The review has not yet been signed by the staff member.

Comments:
There are no staff member comments at this time. Comments may be added by the staff member when the review is signed.
Step 2: Completing the 90 Day Evaluation – Custom Document

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<tr>
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<td></td>
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</tr>
</tbody>
</table>

Click on "Details" by the staff member's name.
Step 2: Completing the 90 Day Review – Custom Document

Click on "Continue/Edit 90-Day Evaluation."
Overall Rating and Upload 90 Day Evaluation – Custom Document

**Custom Document Upload for 90-Day Evaluation Period Review**

**Staff Member:**

**Status:** Incomplete and No Staff Member Access

**Last Updated On:** 10/9/2015 1:01:25 PM  
**Last Updated By:**

**Summary of Performance (You must select an overall rating)**

Check one category that best describes the staff member's overall performance:

- Performance is fully acceptable and results were achieved. This rating describes the performance which consistently met or exceeded performance expectations. Staff members who are performing at this level are likely to remain in the organization.
- Performance meets some but not all expectations; improvement is needed and expected in the future. Staff members working at this level are likely to remain in the organization.
- Performance is below acceptable level for time in position. This rating describes performance which did not consistently met performance expectations. Staff members who are performing at this level will likely be released from employment in the near future.

**Upload Document**

You have elected to add a custom attachment/memo/letter for the staff member's performance appraisal. Click the “Upload Document” button to add the custom attachment. For the existing attachment, simply delete the attachment and upload a new version.

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</table>

**Select an Overall Rating (Summary of Performance).**

Click "Upload Document" to upload the 90 Day Evaluation Review memo or letter that you completed and saved on your computer.

Do not delete the saved performance goals document you uploaded at the beginning of the 90 Day Evaluation Period.
Select and Save Custom Document

Click "Select" to find and select document on your computer. (Document must be closed on your computer before selecting it.)

You must type a brief description of the document in "Attachment Description" field.

Then click "Save Attachment."

Having trouble uploading? Try the alternate upload method.

Click "Delete" if you need to remove the memo or letter review that you just uploaded. Then upload the correct document.

Click "Next Step" if you do not need to upload another document.
Saving the review in draft form will allow you to make changes to the review after discussing it with the staff member.
If you initially saved the 90 Day Evaluation Review memo or letter in draft form, remember to re-enter the Online Performance Appraisal System and mark the 90 Day Evaluation Review “complete” after discussing it with the staff member.

After the review is marked “complete” the staff member can sign the review electronically in the system.
Click on "Details" by the staff member's name.

<table>
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<tr>
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<td>Details</td>
<td></td>
<td></td>
<td>ADMIN COORDINATOR</td>
</tr>
</tbody>
</table>
Select "Continue Evaluation" if you need to make changes to the 90 Day Evaluation Review document you uploaded.

Select "Change Evaluation Status" if you do not need to make any changes to the 90 Day Evaluation Review document you uploaded and just want to mark the review complete.
The review must be marked complete before the staff member can sign it electronically in the online system.
If you want to change the completed 90 Day Evaluation Review back to draft form, you can recall the document if the staff member has not signed it. Follow the steps below. (If the staff member signed the document, contact your HR professional.)

- Access the Online Performance Appraisal System, using your PennKey and password at [https://portal.hr.upenn.edu/](https://portal.hr.upenn.edu/)
- Go to the 90 Day Evaluation section and click “Details” by the staff member’s name
- Click “View Evaluation”
- Click “Recall the Review”
Recalling Completed Review – Custom Document

View 90-Day Evaluation Period Review

Staff Member:

Status: Complete Not Signed  ID#:  Due Date: 10/26/2015
Last Updated On: 10/22/2015 5:56:06 PM  by:

Recall the Review: The staff member has not yet signed this review. You may recall the review and place it back in draft mode.

Close Out Review: Mark this review as complete/closed without the signature of the staff member.

Overall Rating

- Performance is fully acceptable and results were achieved. This rating describes the performance which demonstrates the required skills and duties.
- Performance meets some but not all expectations; improvement is needed and expected in areas specified. Staff member may require additional training.
- Performance is below acceptable level for time in position. This rating describes performance which has not consistently met performance improvement/Discipline Policy.

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 5:56:06 PM.

Staff Member Signature
The review has not yet been signed by the staff member.

Comments:
There are no staff member comments at this time. Comments may be added by the staff member when the review is signed.
You can view or export a completed 90 Day Evaluation Review for a staff member by clicking “Details” by the staff member’s name. Then select “View or Export Evaluation.”
If the staff member voluntarily resigned or their employment was terminated after the goal setting phase is completed but before the evaluation is completed, you can close the 90 Day Evaluation in the online system and stop the supervisor email reminders.

- Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/

- Go to the 90 Day Evaluation section and click “Details” by the staff member’s name

- Click “Continue Evaluation”
Go to the Summary of Performance screen and select “Staff member was terminated before completing the 90 Day Evaluation” or “Staff member voluntarily resigned before completing the 90 Day Evaluation.” Although, it is not required you may upload a final document by clicking on “Upload Document”. Once the document is uploaded click on “Next Step” to close the evaluation. If you do not want to upload a final document just click “Next Step” to close the evaluation.
The Evaluation will be closed out. The review status will be “complete-signed” status, and the overall rating will be “staff member terminated or voluntarily resigned” before completing the 90 Day Evaluation. The supervisor email reminders will no longer be generated by the system.
Questions???

- Contact:
  - Your school/center Human Resources professional

  OR

- Division of Human Resources, Staff and Labor Relations at 215-898-6093