Online Performance Appraisal System
90 Day Evaluation Period (for internal transfers)
Completing the Standard Form
Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
Home Screen

Performance Appraisal Management

- My Appraisals
- Appraisal Review Year: 2015
  - My Current Appraisals
    - Draft, Edit, Complete or View Own Self-Appraisal
    - View Own Annual Performance Appraisal

- My Staff
  - 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

- Other
  - My Activity Log
### 90 Day Evaluation – Standard Form:
#### Step 1 - Establish Performance Goals

**My Staff - 90-Day Evaluation**

Your staff members below are internal hires.

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td>COORDINATOR PROGRAM</td>
<td></td>
</tr>
<tr>
<td>Details</td>
<td></td>
<td>ADMIN COORDINATOR</td>
<td></td>
</tr>
</tbody>
</table>

Click "Details" by staff member's name to start 90 Day Evaluation.
90 Day Evaluation – Standard Form:
Step 1 - Establish Performance Goals

Click "90 Day Evaluation" to begin.

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.

Start 90-Day Evaluation
Select Type of Review – Standard Form

Choose Standard Format (form) or Upload Custom Document (memo or letter). Then click "Next Step."

You can complete the 90 Day Evaluation Form or upload a custom document (Memo or Letter) outlining the performance expectations/goals and competencies for the evaluation period.
You can add as many goals, projects, expectations as needed by selecting “Add Goal.”
Goals should be SMART: Specific, Measurable, Achievable, Realistic and Include a Timeframe for completion.
Add Performance Goals

Staff Member: Status: Incomplete and No Staff Member Access
Last Updated On: 10/7/2015 10:20:40 AM Last Updated By:

Key Goals, Projects, and Responsibilities for the 90-Day Evaluation Period:

Describe the key goals, projects, and/or responsibilities that the staff member will be expected to achieve during this 90-Day Evaluation Period.
*Complete at the beginning of the 90-Day Evaluation Period.

Goal/Project/Responsibility:

Complete accurate, thorough monthly reports on program activity in accordance with established template by the fifteenth of the following month.

Edit This Goal Delete This Goal

Previous Step Add Goal Next Step
You can add 1 to 5 competencies for the staff member to work on during the 90 Day Evaluation Period. THIS IS OPTIONAL. Click “Next Step” if you do not want to add competencies.
Select Competencies – Standard Form

Add Competency

Competency Name:
Accountability

Competency Description:
Takes responsibility for all work activities and implements decisions that have been agreed upon; maintains confidentiality with sensitive information; acknowledges and learns from mistakes without blaming others; recognizes the impact of one’s behavior on others.

Click Arrow to Select Competency, then Save

Save Competency  Cancel
Select Competency – Standard Form

Select 1 Competency at a time
Edit, Delete or Add Another Competency – Standard Form

Add Competencies

Staff Member: [Name]
Status: Incomplete
Last Updated On: 10/7/2015 10:36:24 AM
Last Updated By: [Name]

Competencies:
Identify and discuss with the staff member 1–5 key competencies that would identify a candidate as a “good fit” for the position.

Click the “Add Competency” button to add each competency that you would like to comment on. A list of all competencies will be shown after clicking the “Add Competency” button.

*Complete at the beginning of the 90-Day Evaluation Period.

Competency Name:
Problem Solving

Competency Description:
Generates creative approaches to addressing problems and opportunities; identifies and weighs options; makes sound decisions after reviewing all relevant information; anticipates implications of decisions or actions; uses reasoning with logic and reasonable judgment to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.

Edit This Competency  Delete This Competency

Previous Step  Add Competency  Next Step

You can edit or delete the saved competency or add another competency. If you don’t want to add another competency, click "Next Step."
Saving the goals in draft form will allow you to make changes to the goals after discussing them with the staff member.
## My Staff - 90-Day Evaluation

Your staff members below are internal hires who have moved to a new position within the same department, a different department, 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>Establish Goals Incomplete - No Staff Member Access</td>
</tr>
</tbody>
</table>

Status of document is updated on home page.
Once you have reviewed the draft goals/expectations with the staff member, you need to re-enter the draft document and finalize the goals/expectations.
If you need to make changes to the draft Performance Goals, click "Continue/Edit Evaluation." If you only need to change the status of the Performance Goals, (e.g., from draft to finalized), click on "Change Evaluation Status."
After discussing the performance expectations with the staff member, make any needed changes to the 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 you mark them “finalized.”**
Recalling Completed Goals – Standard Form

- 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/](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 – Standard Form

View 90-Day Evaluation Period Review (Establishing Goals)

Staff Member:

Status: Complete Not Signed       ID#:       Due Date: 10/31/2015
Last Updated On: 10/22/2015 3:39:12 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.

Goals, Projects, and Responsibilities

Goal:

weatsaj[5rhj4hjlwt6e0qh5trn]23trh904

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 3:39:12 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 – Standard Form

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

- This review can be completed via the Online Performance Appraisal System by completing the steps outlined in the following slides.

- If you want to place the staff member on probation or another step in the progressive disciplinary process, **you must 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 – Standard Form

- 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 – Standard Form

View 90-Day Evaluation Period Review (Establishing Goals)

Staff Member:
Status: Complete Not Signed  ID:  Due Date: 10/31/2015
Last Updated On: 10/22/2015 3:39:12 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.

Goals, Projects, and Responsibilities

Goal:
weatsaj[5rhj4hj]wt6e0qh5tmj23trh904

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 3:39:12 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.
### 90-Day Evaluation

**My Staff - 90-Day Evaluation**

Your staff members below are internal hires who have moved to a new position within the last 90 days or have moved to a different department.

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on "Details" by the staff member's name.
Step 2: Completing the 90 Day Evaluation – Standard Form

Appraisal Review Year: 2015
The current appraisal year being viewed is the 2015 fiscal year, which is the period from January to December.

Current Appraisals (2015)

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

Click on "Continue/Edit 90-Day Evaluation."
Giving Feedback on Performance Goals – Standard Form

Feedback on Performance Goals

Staff Member: 

Status: Incomplete and No Staff Member Access

Last Updated On: 10/8/2015 12:58:20 PM  Last Updated By

Feedback on Key Goals, Projects, and Responsibilities for the 90-Day Evaluation Period:

Describe the key goals, projects, and/or responsibilities that the staff member was expected to achieve.

*Complete before the end of the 90-Day Evaluation Period.

Goal/Project/Responsibility:

- Complete accurate, thorough monthly reports on program activity in accordance with established template by the fifteenth of the following month.

- Describe performance results, including supporting examples.

- Jon Doe completed the monthly reports in an accurate, thorough and timely manner with limited supervision.

Click on "Edit This Goal."
Give feedback on staff member's progress at meeting each goal. This feedback should be entered into the "Describe performance results" field. Then select, "Save Goal."

Jon Doe completed the monthly reports in an accurate, thorough and timely manner with limited supervision.
The performance feedback you entered and saved will appear under the established goal. If you need to edit the feedback, click "Edit This Goal." You should give feedback on all goals outlined at the beginning of the 90 Day Evaluation Period. After completing feedback on the goal, click "Next Step."
You will only need to give feedback on competencies if you assigned them at the beginning of the 90 Day Evaluation Period. Assigning competencies is optional.
Give feedback on how the staff member demonstrated the competency and recommendations for further development in the appropriate field. You should give feedback on each competency assigned at the beginning of the 90 Day Evaluation Period. Then click "Save Competency."
The competency feedback entered and saved will appear under the assigned competency. If you need to edit your feedback, click "Edit This Competency." You should give feedback on all competencies assigned at the beginning of the 90 Day Evaluation Period. After completing the feedback, click "Next Step."
Adding an Attachment is an **OPTIONAL** step.
Click "Select" to find and select document on your computer. (Document must be closed on your computer before selecting it.)

You must enter a brief description of attached document in "Attachment Description" field.

Then click "Save Attachment"
File name and description of saved attachment will appear. You can delete if it is the wrong document. If it is the correct document, select "Next Step."

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Outline.docx</td>
<td>Training Outline</td>
<td>25</td>
</tr>
</tbody>
</table>

- Previous Step  Add Attachment  Next Step
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.**
Add Goals for Remainder of Cycle

You need to create goals for the remainder of the appraisal cycle. You can import the goals you entered in the beginning of the 90 Day Evaluation Period by clicking "Load Previous."

To add a new goal, click "Add Goal."

This step must be completed if staff member’s employment will continue.
Add Competencies for Remainder of Cycle

This step is OPTIONAL.

To create competencies for the remainder of the appraisal cycle:

1. You can import the competencies you established at the beginning of the 90 Day Evaluation Period by clicking "Load Previous."

2. To add a new competency, click "Add Competency."

If you don’t want to add competencies, click "Next Step."
This step is **OPTIONAL**.
Add Professional Development/Learning Goals

Enter the professional development or learning goal in the appropriate space and click "Save Learning Goal."
Saved professional development or learning goal will appear. You can edit or delete the goal by clicking on the appropriate "Edit" or "Delete" buttons.

Add another professional development or learning goal by clicking "Add Learning Goal."

If you do not want to add another goal, click "Next Step."
Saving the review in draft form will allow you to make changes to the review after discussing it with the staff member.
Complete 90 Day Evaluation – Standard Form

- If you initially saved the 90 Day Evaluation Period Review in draft form, remember to re-enter the Online Performance Appraisal System and mark the 90 Day Evaluation Period 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.
Mark 90 Day Evaluation Complete – Standard Form

- Sign on to the Online Performance Appraisal System
- Click “Details” by the staff member’s name

Then click “Continue Evaluation” if you want to make changes to the document. Click “Change Evaluation Status” if you do not want to make any changes to the document, you just want to mark the existing document “complete.”
Completion of 90-Day Evaluation Period Review

Staff Member: [Name]
Status: Incomplete With Staff Member
Last Updated On: 10/8/2015 2:23:37 PM   Last Updated By: [Name]

Save/Finish Review
You have completed the steps necessary for the 90-Day Evaluation Review. You should save the 90-Day Evaluation Period Review should be saved and click the “Save/Finish” button.

- Draft 90-Day Evaluation Period Review – Not Staff Member Accessible:
  The 90-Day Evaluation Period Review will be saved as a draft and will only be visible to you. The staff member will NOT be able to access the approval.

- Draft 90-Day Evaluation Period Review – Staff Member Accessible:
  The 90-Day Evaluation Period Review will be saved as a draft and the staff member WILL be able to view it. This status allows for review and discussion.

- 90-Day Evaluation Period Review Complete:
  The 90-Day Evaluation Period Review is complete. No more changes will be allowed and the staff member will be prompted to sign/acknowledge.

- Forward the 90-Day Evaluation Period Review:
  The 90-Day Evaluation Period Review will be saved as a draft and forwarded to a supervisor above you. The staff member will NOT be able to access.

Remember to mark the 90 Day Evaluation Review "Complete" after discussing the review with the staff member.
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 – Standard Form

View 90-Day Evaluation Period Review

Staff Member:

Status: Complete Not Signed  ID#:  Due Date: 10/31/2015
Last Updated On: 10/22/2015 3:49:06 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.

Ratings | Goals | Competencies | New Goals | New Competencies | Learning Goals | Export | Activity Log

Overall Rating

-Performance is fully acceptable and results were achieved. This rating describes the performance which demonstrates the
-Performance meets some but not all expectations; improvement is needed and expected in areas specified. Staff memb
-Performance is below acceptable level for time in position. This rating describes performance which has not consisten

Overall Comments:

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 3:49:06 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.

Penn Human Resources
You can view or export a completed 90 Day Evaluation for a staff member by clicking “Details” by the staff member’s name. Then select “View or Export Evaluation.”
Staff Member Who Left Penn Before Evaluation is Completed

- 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/](https://portal.hr.upenn.edu/)
- Go to the 90 Day Evaluation section and click “Details” by the staff member’s name
- Click “Continue Evaluation”
- Click “Edit This Goal”/“Edit This Competency” - For each performance goal/competency established, enter N/A or not applicable, in the “Describe performance results” fields.
- Click “Next Step”
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.” 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
  - Division of Human Resources, Staff and Labor Relations at 215-898-6093