Online Performance Appraisal System
Introductory Review Period (for newly hired staff)
Completing an Introductory Review – Standard Form
Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
### Introductory Review – Standard Form:

**Step 1: Establish Performance Goals**

Your staff members below are new hires who are in their Introductory Review Period.

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
<th>Job Title</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td>AS</td>
<td>PENN MEDS CELEBR _</td>
<td>7/13/2015</td>
</tr>
<tr>
<td>Details</td>
<td></td>
<td>COUNSELOR</td>
<td></td>
<td>7/16/2015</td>
</tr>
</tbody>
</table>

Click "Details" by staff member’s name to start Intro Review.
Introductory Review – Standard Form:
Step 1: Establish Performance Goals

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.

Staff Member’s Intro Review Module
This new staff member is in the Introductory Review Period.

Click "Start Intro Review Module" Button to begin
You can complete the Intro Review Form (standard form) or upload a custom document (Memo or Letter) outlining the performance expectations/goals and competencies for the review period. Select "Standard Introductory Review."
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.
Edit, Delete or Add a Goal – Standard Form

Add Performance Goals
Staff Member: AS
Status: Incomplete and No Staff Member Access
Last Updated On: 9/15/2015 6:11:52 PM  Last Updated By: 

Key Goals, Projects, and Responsibilities for the Introductory Review Period:
Describe the key goals, projects, and/or responsibilities that the staff member will be expected to complete at the beginning of the Introductory Period.

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

Edit This Goal  Delete This Goal

Previous Step  Add Goal  Next Step

You can edit or delete the saved goal or add another goal.
You can add 1 to 5 competencies for the staff member to work on during the Introductory Review Period. THIS IS OPTIONAL. Click on “Next Step” if you do not want to add competencies.
Add 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 1 Competency at a time
Edit, Delete or Add Another Competency – Standard Form

Add Competencies

Staff Member: AS.
Status: Incomplete and No Staff Member Access
Last Updated On: 9/16/2015 6:34:32 PM  Last Updated By:

Competencies:
Identify and discuss with the staff member 1 – 5 key competencies that are vital to the success of the position. You can give suggestions on methods to enhance these competencies.

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

*Complete at the beginning of the introductory 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.

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.
Status of Document Updated on Home Page

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Penn ID</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td></td>
<td>A.</td>
<td>Establish Goals Incomplete - Staff Member Accessible</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.
Finalize Performance Goals – Standard Form

If you need to make changes to the draft Performance Goals, click "Continue IRM" If you only need to change the status of the Performance Goals, (e.g., from draft to finalized), click on "Change IRM 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 the supervisor marks them “finalized.”
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 by following the steps below. (If the staff member signed the document, contact your HR professional.)

- Access the online system, using your PennKey and password, at https://portal.hr.upenn.edu/
- Go to the Intro Review Module section, click “Details” by the staff member’s name
- Click “View IRM”
- Click “Recall the Review”
Recalling the Completed Goals – Standard Form

View Introductory Review Period Appraisal (Establishing Goals)

Staff Member:
Status: Complete Not Signed
ID: 
Due Date: 11/4/2015
Last Updated On: 10/22/2015 2:57:00 PM by:

Recall the Review
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:

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 2:57:00 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.
Prior to the end of the staff member’s Introductory Period, you must complete the Introductory Review 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 extend the Introductory Period or terminate the staff member, 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 Introductory 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 Introductory Review by following the steps below:
    - Access the Online Performance Appraisal System, using your PennKey and password at https://portal.hr.upenn.edu/
    - Go to the Intro Review Module section and click “Details” by the staff member’s name
    - Click “View IRM”
    - Click “Close Out Review”
Close Out Completed Goals – Standard Form

View Introductory Review Period Appraisal (Establishing Goals)

Staff Member:

- **Status:** Complete Not Signed
- **ID#:**
- **Due Date:** 11/4/2015
- **Last Updated On:** 10/22/2015 2:57:00 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: This review can be completed/closed without the signature of the staff member.

Goals, Projects, and Responsibilities

Goal:

- sc:adtgfweqtjpsajtrfoj

Supervisor Signature

Signed by AYLOR, SHARON M on 10/22/2015 2:57:00 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 Introductory Review – Standard Form

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

Click on "Details" by the staff member's name
Step 2: Completing the Introductory Review – Standard Form

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

Current Appraisals (2015)

Staff Member’s Intro Review Module
This new staff member is in the Introductory Review Module.

Click on "Continue/Edit Intro Review Module"
Giving Feedback on Performance Goals – Standard Form

Feedback on Performance Goals

Staff Member: [Redacted] Status: Incomplete and No Staff Member Access
Last Updated On: 9/22/2015 12:10:35 PM Last Updated By: [Redacted]

Feedback on Key Goals, Projects, and Responsibilities for the Introductory Review Period
Describe the key goals, projects, and/or responsibilities that the staff member was expected to achieve during this Introductory Period.
*Complete towards the end of the Introductory Period.

Goal/Project/Responsibility:
Complete accurate, thorough monthly reports, and submit them along with established template by the fifthe

Describe performance results, including supporting examples

Click on "Edit This Goal"
Giving Feedback on Performance Goals – Standard Form

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".

This goal was signed off on at the beginning of the process and cannot be edited. If this goal has changed, provide those details in the results below. If this goal is no longer applicable, indicate "No longer applicable" in the results below, and add a new/updated goal on the main screen if needed.

Describe performance results, including supporting examples:

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 Introductory 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 Introductory 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 Introductory 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 Introductory Period. After completing the feedback click "Next Step."

<table>
<thead>
<tr>
<th>Competency Name:</th>
<th>Problem Solving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency Description:</td>
<td>Generates creative approaches to addressing problems and opportunities; evaluates and weighs options; makes sound recommendations.</td>
</tr>
<tr>
<td>Describe how the staff member demonstrated competency and how the staff member should further develop:</td>
<td>Jon, you demonstrated good problem solving skills as evidenced when you...</td>
</tr>
</tbody>
</table>

**Edit This Competency**

[Previous Step] [Add Competency] [Next Step]
Adding an Attachment is an OPTIONAL step.
Select Attachment – Standard Form

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>File Size</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Outline.docx</td>
<td>21.36 KB</td>
<td>Training Outline</td>
</tr>
</tbody>
</table>
If you want to extend the Introductory Period or terminate the staff member’s employment, 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 Introductory Review 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 and may be completed if staff member’s employment will continue. If you don’t want to add competencies, click “Next Step.”
This step is **OPTIONAL**.
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.
If you initially saved the Introductory Review in draft form, remember to re-enter the Online Performance Appraisal System and mark the Introductory 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.
Once you have reviewed the draft review with the staff member, you need to re-enter the draft document by clicking “Details” by the staff member’s name.
Select “Continue/Edit IRM” to edit draft review. Select “Change IRM Status” to proceed directly to the Save/Finish Review screen and mark review “Complete” without amending the draft review.
Mark Introductory Review Complete – Standard Form

Completion of Introductory Review

Staff Member: [Staff Member Name]  Status: Incomplete

Last Updated On: 10/2/2015 1:47:35 PM  Last Updated By: [Last Updated By Name]

Save/Finish Review

You have completed the steps necessary for the Introductory Review. You should now save and click the "Save/Finish" button.

- [ ] Draft Introductory Review – Not Staff Member Accessible:
  The Introductory Review will be saved as a draft and will only be visible to you. This status allows for review and discussion.

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

- [ ] Introductory Review Complete:
  The Introductory Review is complete. No more changes will be allowed and the staff member will be prompted to sign/acknowledge receipt.

- [ ] Forward the Introductory Review:
  The Introductory Review will be saved as a draft and forwarded to a supervisor above you. The staff member will NOT be able to access the document.

Previous Step  Save/Finish

Remember to mark the Introductory Review "Complete" after discussing the review with the staff member.
If you want to change the completed Introductory Review back to draft form, you can recall the document if the staff member has not signed it by following the steps below. (If the staff member signed the document, contact your HR professional.)

- Access the online system, using your PennKey and password at [https://portal.hr.upenn.edu/](https://portal.hr.upenn.edu/)
- Go to the Intro Review Module section and click “Details” by the staff member’s name
- Click “View IRM”
- Click “Recall the Review”
Recalling the Completed Intro Review – Standard Form

View Introductory Review Period Appraisal

Staff Member:
Status: Complete Not Signed  ID:
Due Date: 11/2/2015
Last Updated On: 10/22/2015 3:05:56 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 desired level of achievement.
- Performance generally acceptable – but improvement is needed and expected.
- Performance is below acceptable level for time in position. This rating describes performance which has not kept pace with requirements.

Recommended Action

Recommended action for the staff member?
Retain staff member

Overall Comments:

Supervisor Signature
Signed by AYLOR, SHARON M on 10/22/2015 3:05:55 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 Introductory Review for a staff member by clicking “Details” by the staff member’s name. Then select “View or Export IRM.”
If the staff member voluntarily resigned or their employment was terminated after the goal setting phase is completed but before the review is completed, you can close the Introductory Review 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 Intro Review section and click “Details” by the staff member’s name
- Click “Continue/Edit Intro Review Module”
- 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 Introductory Review period” or “Staff member voluntarily resigned before completing the Introductory Review period.” Once you choose one of these categories, the Recommended Action section will default to “Terminate staff member’s employment.” Click “Next Step”.

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**Recommended Action**

What action do you recommend for the staff member?

- Terminate staff member's employment
- Extend introductory period for staff member (simulation of extension below)
The Introductory Review will be closed out. The review status will be “complete-signed” status, the recommended action will be “staff member terminated or voluntarily resigned” before the end of the review period. 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