

# Creating Special and Probationary Appraisals

The process to create **Special** and **Probationary Appraisals** is almost identical to the process used to create Annual Appraisals. To create either a Special or Probationary Appraisal, the Rater will click the Create New Appraisal link from their Home Page:

The screenshot shows the top navigation bar with links: Home, My Employees, My Reviews, System Administration, My Agency Admins, Proxy, Reports, Online Help, Log Out. Below this is the 'Home Page' section. On the left, under 'Raters', there is a 'My Employee List' section with a link 'View My Current Employees' and a 'Performance Plans (Objectives)' section with a link 'Develop/Update Performance Objectives'. On the right, under 'Performance Appraisals (Ratings and Annual Rating Exemptions)', there is a list of links: 'Create New Appraisal', 'Update Incomplete / Overturn Completed' (with a tooltip: 'Allows you to create new appraisal documents for your employees.'), 'View Current Complete and Exempt Appraisals', 'View All Complete and Exempt Appraisals', 'View All Incomplete Appraisals', and 'Search Appraisals'.

This will take the Rater to a page listing the employees he or she supervises. The Rater will select the employee for whom the appraisal is to be created by clicking the employee's name.

The screenshot shows the 'Employee List - Performance Appraisals' page. At the top, it says 'The Missouri State Employee Online Performance Appraisal System' and 'PERforM Productivity, Excellence and Results for Missouri'. Below this is a navigation bar with links: Home, My Employees, My Reviews, System Administration, Reports, Online Help, Log Out. The page title is 'Home Page > Select Employee - Performance Appraisals'. There is a link 'Who is required to have an annual appraisal?'. Below this is a paragraph: 'You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.) Click on an employee's name to create a new performance appraisal. (2) total employees'. Below this is a table with the following data:

Employee Name	Title Code	Job Title	Organization Name	Supervisor	Annual Required
<a href="#">LEVY, KELLY ANN</a>	000493	TRAINING TECH III	PERS-STAFF	Yes	Yes
<a href="#">SCROGGINS, CYNTHIA</a>	000493	TRAINING TECH III	PERS-STAFF	Yes	Yes

The Rater will be taken to the Select Appraisal Type page to select the type of appraisal (Special or Probationary) they want to create for the employee. The Rater will select the appraisal type from the drop down box and click "OK."

The screenshot shows the 'Select New Appraisal Type' page. At the top, it says 'Home Page > Select Employee - Performance Appraisals > Select Appraisal Type'. There is a link 'How to Evaluate and Rate Employee Performance Objectives'. Below this is a summary box with the following information: 'Employee Name LEVY, KELLY ANN', 'Job Title TRAINING TECH III', 'Organization PERS-STAFF', and 'Supervisor Yes'. Below this is a 'Select New Appraisal Type' dropdown menu with 'Special' selected. At the bottom, there are 'OK', 'Cancel', and 'Enable Quick Scoring' (checked) buttons.

The Create Performance Appraisal page will open. The example below shows the Appraisal in “Quick Scoring” mode.

**NOTE:** If performance objectives were not previously created for the appraisal type (Special or Probationary), the Rater will not be able to proceed with the appraisal until this step has been completed. In other words, a specific “set” of objectives must already exist for Special or Probationary Appraisals. If the Rater initially created performance objectives which apply to the employee’s Annual appraisal, a new – or duplicate set of objectives – must also be created for other types of appraisals.

The screenshot shows the PERforM web application interface. At the top, there is a header with the logo and navigation links. Below the header, there is a navigation bar with links for Home, My Employees, My Reviews, Reports, Online Help, and Log Out. The main content area is titled "Create New Appraisal" and includes a warning about session timeout. Below this, there are two sections: "Employee Details" and "Performance Appraisal Details".

Employee Details		Performance Objectives	
Employee Name	CLEVER, KATHY A	Job Title	SPECIAL ASST TECHNICIAN
Supervisor Name	SAMPLE, SAM S	CIVS Description	UCP MERIT SYSTEM UNCLASSIFIED
Agency	OFFICE ADMINISTRATION-OPER	Percentage Fulltime	1.0000
Organization	MENTAL HEALTH	Months of Service	73.0 months

  

Performance Appraisal Details			
Appraisal Type	Probationary	Rating Period	-
Appraisal Status	New	Last Updated Date	9/15/2008 1:53:44 PM
Overall Score	-	Overall Rating	-

Below the details, there are input fields for "Appraisal Start Period" and "Appraisal End Period", each with a calendar icon. The main body of the form contains five performance categories, each with a rating scale from 1 to 10:

- 1. Knowledge of Work
- 2. Quality of Work
- 3. Situational Responsiveness
- 4. Initiative
- 5. Dependability

At the bottom, there is an "Overall Comments" text area and a row of buttons: Calculate Only, Save, Submit, Exempt & Submit, Attachments, and Print Preview. A "Back to top" link is also present.

The significant difference between creating an Annual Appraisal and creating a Special or Probationary Appraisal is the need to enter the Appraisal’s Start Period and the Appraisal’s End Period. To select an appraisal start date, the Rater will click on the calendar next to the text box:

This close-up shows the "Appraisal Start Period" and "Appraisal End Period" input fields. Each field has a small calendar icon to its right. A mouse cursor is hovering over the "Open Calendar" link below the "Appraisal Start Period" field.

A calendar will pop up for the Rater to select a start date for the Appraisal. The Rater will click on the desired date to indicate the start date:



The selected date will appear in the text box.

*Appraisal Start Period*

The Rater can also type a date in the box instead of using the pop up calendar. For example, the Rater could type the end date for the Appraisal directly in the box instead of using the calendar.

*Appraisal End Period*

## Completing the Appraisal

After these initial steps have been completed, the Rater will fill out the appraisal with necessary rating and comment information and then submit it for approval in the same manner Annual Appraisals are processed.

For more detailed information concerning processing steps involved in creating an appraisal, please refer to the [Creating Annual Appraisals](#) link.