

Performance Development Web System Instructions

To report PDS technical/systems problems or issues, please email pds@temple.edu

PDP Enhancements 2006-07

1. Eliminating the need to scroll down to your previous spot on a PDP after an update.
2. Addition of Reviewer who created PDP and Current Reviewer - This will save you from calling HR to tell us that an employee's previous supervisor is listed on the PDP.
3. Under direct reports' PDP status column, PDP required without rating was added - This enhancement will remind supervisors that PDPs must be started for employees during their introductory period and that a rating is not required for employees who start after January 1, of the current review period.
4. Rating scale additions of 1.5, 2.5, 3.5. (Please note: Comparing this year's PDP score with your score from prior years, where your reviewer may have rounded up or down, can be misleading and therefore higher or lower PDP scores may be related to the scale change as well as differences in performance.)
5. You will be reminded early and often to save your work. There is a 15-minute time-out feature on the PDS so please save your work as often as you can.
6. Employees may now add comments in the body of the PDP after it has been rated and sent to them for review.
7. The "Save" button will always be visible no matter what screen view is on a computer.
8. The "Create Print Format" button has been renamed "Create Read/Print Format" button. This allows you to see and, if you choose, print a PDP with all comments visible without having to use the view more links found on the PDP in the regular format.
9. Once employees PDPs are beyond the "work in progress" status, the "Create PDP for next year" will appear and will allow both employees and supervisors the opportunity to begin FY 2007/08 PDPs. **Teamwork and Collaboration** will be the University-wide competency and will be pre-set.
10. PDPs for employees who no longer work at the University will be saved in an archive file and supervisors will no longer see them in their PDP hierarchy.

FY 2006-07 PDP Due Dates:

June 8, 2007 for Non-Union PDPs

June 29, 2007 for Union PDPs (please contact us if you need to discuss an extension)

PDP Enhancements 2005-06

1. Either reviewer/supervisor or employee can start a PDP.
2. Reviewer/supervisor and employee can add comments to the PDP throughout the year.
3. Ability for reviewer/supervisors to review all employees' PDPs in their hierarchy at any stage of development/review.
4. Improved print function.
5. "Rate all competencies" feature allowing core and role competencies to be rated without page refreshing each time.
6. Ability for reviewer/supervisor to "lock" the PDP.
7. Reviewer's comments required for all essential functions and goals before they can be rated.
8. 2006/07 goals are required on current year PDP.
9. Email notifications/reminders.
 - a. Notice to reviewer/supervisor that PDP has not been created and to create one immediately.
 - b. Notice to reviewer's supervisor that a PDP has been sent for review/ comments, and that PDP must then be sent back to the reviewer.
 - c. Notice from reviewer's supervisor to reviewer announcing that PDP has been reviewed and is awaiting action (make changes or send to employee as is). This notification will remind reviewer to meet with employee to review the PDP before it is sent to the employee.
 - d. Notice to employee that PDP has been completed and is awaiting review. This notification will inform employees that they may add comments and then click either the "Reviewed and Agree" button or the "Reviewed and Disagree" button.
 - e. Notice to Reviewer from Employee stating "If you choose not to make any changes, the PDP process is completed and the Human Resources Department now has it in its data base as a finalized PDP. You should now begin the next year's PDP. If you choose to make any changes, you must first click on the "Revise Rated PDP" button. This ensures that the PDP will be returned to the employee for review after you have made modifications."

Getting Started: Creating a PDP

- Either the employee or the reviewer may log onto the application to bring up the Home Page. To log on, use Internet Explorer and enter this address: pds.temple.edu. Direct links to the PDS are also available on the HR website and on the Portal.
- Enter Accessnet user name into the Accessnet User Name Box and password into the Password box (this is the same User name and password used for TU Mail).
- Click on “submit.” This will open your home welcome screen where you will be greeted by name.
- Employees can click the button, “Create a PDP for the Current Review Period” to begin their PDPs.
- For reviewers, the home page includes an alphabetical list of direct reports. Click on the name of a direct report to gain access to his/her PDP.
- Next to the name of the direct report will be the status of the employee’s PDP, i.e., PDP Not Required, PDP required without rating, Work in Progress, Submitted to Reviewer’s Supervisor for Review or Submitted to Employee Review. The employee’s status is also provided and indicates if the employee is currently working at the University (active status). PDPs only need to be created for active status employees and rated only for employees who were hired prior to December 31 of the current fiscal year. Terminated employees have been moved to a archive file that HR can access.

PDP Details Section

- This section includes the following information:
Employee’s Name, Position and Title; Reviewer’s Name and Title; Evaluation Period; the final rating and other pertinent data including dates of planning and evaluation meetings and the Employee Sign Off date.
- The system automatically enters dates for all processes except meeting dates. The reviewers’ version of PDP Details section includes an electronic calendar to set the dates of the Planning Meeting and the Final Evaluation Meeting. To add these required meeting dates and reviewer or employee comments, click on the “Edit PDP Details” button.” These dates must be completed before a rated PDP can be sent to the Reviewer’s Supervisor or the Employee.

- The reviewers' version of PDP Details section also includes a "Lock/Unlock" button. When locked by the reviewer, the employee may not edit, delete or add Essential Functions, Goals and Projects, and Competencies on his/her own PDP, but may continue to add comments.
- A Read/Print PDP button is available in this section for both Employee and Reviewer.

Part I – Essential Functions

- This section contains the essential functions designated as the employee's responsibility.
- Essential Function information can be inserted into this section by importing this information from the previous year's PDP. The Import Essential Functions process allows a reviewer or an employee to import Essential Functions from one PDP into another. This alleviates having to manually enter this information which tends to stay the same each year. To import information from one year's PDP into the next:
 - Click on the "Import Essential Functions" button. This button will only appear if essential functions have not been added to the PDP and if the PDP from the previous year has essential functions
 - The page will refresh with the imported information. Essential Functions may be added, deleted, edited and rated (note: there must be a reviewer's comment before rating).
- Employees and reviewers may add comments to a PDP at any time during a rating period. To add dated comments in this section:
 - move the cursor over the Essential Function which will change from blue to red, indicating that clicking on it will link to the section where Comments are added
 - click "Add" which will reveal an area in which Comments may be added. **Note: Reviewer's comments can be seen by the Reviewer's Supervisor at all stages of the process but by employees only when PDP is in "Sent to Employee" status. Employee's comments also may be seen by the supervisor at all stages of the process.**
 - date Comments by clicking on the calendar to the right of the "Review period" space
 - save Comments by clicking on "Save," located on the right of the page – **remember after 15 minutes of no activity, the system times out and comments may be lost.**
 - clicking "Cancel" will delete your Comment entry and return you to the main document

A reviewer will not be able to rate an essential function item without having first made a comment in the Reviewer's Comments Section.

Part II – Goals and Projects

- This section contains the goals and projects assigned to an employee during an evaluation period. To add, click on “Add Goals,” enter goal in the space, and click “Save.” Page will automatically refresh. Goals/Projects may also be deleted, edited, and rated (note: there must be a reviewer's comment before rating)
- Employees and reviewers may add comments to a PDP at any time during a rating period. To add dated comments in this section:
 - move the cursor over the Goal/Project which will change from blue to red, indicating that clicking on it will link to the section where Comments are added
 - click “Add” which will reveal an area in which Comments may be added
Note: Reviewer comments can be seen by the Reviewer's Supervisor at all stages of the process and employee's comments can be seen by the Employee's Supervisor at all stages of the process
 - date Comments by clicking on the calendar to the right of the “Review period” space
 - save Comments by clicking on “Save,” located on the right of the page –**remember after 15 minutes of no activity, the system times out and comments may be lost.**
 - clicking “Cancel” will return you to the PDP without saving your changes.
 - clicking “Delete” will remove your comment

A reviewer will not be able to rate a goal or project without having first made a comment in the Reviewer's Comments Section

Part III – Competencies

A. Competency Development

- Core competencies include values/skill/capabilities that are institution-wide. Role related competencies are those that are essential in certain positions.
- To add a competency in the Competency Development section:
 - click “Add Core Competency” and/or “Add Role Competency”
 - scroll down either the Core Competencies or Role Competencies lists and identify competencies to be added to the PDP

- to add a competency, click on the box to the left of the competency description and click the “Save” button
- selected competencies will move from Part III B to Part III A. You may delete any competency you have chosen except for the pre-set mandated University-wide developmental competency, which is Teamwork and Collaboration for FY 2007/08. You may also create, copy, paste and edit Developmental Activities and Comments by using the same process used for Essential Functions and Goals/Projects.

Final Rating (This section is for Reviewers only)

To rate an employee at the end of the fiscal year:

- Revisit each Essential Function, goal/project, competency to be developed and all remaining core and selected role related competencies and move the cursor over each rating.
- **System will not accept a rating for Essential functions and Goals/Projects if reviewer’s comments have not been added**
- **All** core competencies must be rated.
- Rating number will turn from blue to red, indicating that clicking on it will bring up the screen that will allow the item to be rated. All core and role related competencies must be rated individually but system enhancement includes a “Rate All” feature. This feature eliminates the need for the system to refresh after each individual rating.
- You must rate only those role competencies you select. Role related competencies selected in error may be deleted by moving the cursor over the Role Competency which will change from blue to red, indicating that clicking on it will link to the section where the delete button appears.
- As Parts I, II and III of an Employee’s PDP are rated, the final rating will be electronically calculated to two decimal places and displayed in the PDP Details section. The PDP is weighted with 40% for Essential Functions, 40% for Goals/Projects, and 20% for all Competencies.

Part IV: Future Goals and Projects

- This section of the PDP is required prior to sending the PDP to the reviewer’s supervisor or to the employee. Either the employee or the Reviewer **must** enter anticipated goals for the upcoming fiscal year. You will be able to import these goals and edit, add, or delete goals onto the employee’s next FY PDP.

- Reviewer's Supervisor Review/Approval (**This section is for Reviewers only**)
 - After all items have been rated and all other required data entered, click "Send to Reviewer's Supervisor" for review **only if this is required by the reviewer's supervisor**. If the reviewer is not required to send to his/her supervisor, the reviewer should proceed directly to instructions for "Reviewer Submission to Employee."
- If information is missing, the system will announce and detail what is missing and will not allow the process to continue until all information is provided.
- The Reviewer's Supervisor is unable to make any changes to the PDP. When the Reviewer's Supervisor signs on to the system and reaches the home page, the status for the sent PDP will be awaiting review by reviewer's supervisor. The reviewer's supervisor will receive a system-generated e-mail reminder that there is a PDP awaiting review.
 - To view the PDP, click on the Review period which will turn red. The Reviewer's Supervisor is now able to review the PDP sent from the Reviewer.
 - To write a comment that will only be seen by the Reviewer, click "Edit PDP Details." A box will appear and comments can be written inside. To exit comment box, click "Save."
 - To return to the Reviewer, click "Sign Off and Return to Reviewer."
- Reviewer Submission to Employee (**This section is for Reviewers only**)
 - Reviewer may either send a PDP to an employee directly or after receiving it back from his/her supervisor depending on procedure required by the reviewer's supervisor.
 - **If sending directly to employee**, the reviewer should meet with the employee and review PDP ratings and the goals for the following year, add the Date of Evaluation Meeting in the PDP Details Section, and then submit the PDP to the employee by clicking the "Submit to Employee" button.
 - **If PDP was first sent to Reviewer's Supervisor and then returned to reviewer**, the PDP status will state "Reviewed by Reviewer's Supervisor." Reviewer will also receive an e-mail stating the PDP has been reviewed by the Reviewer's supervisor and is awaiting further action.
 - To view Reviewer's Supervisors' comments, click employee's name, click "Review Period," and then click "Click to View Reviewer's Supervisor's Comments."

- To make changes to any area of the PDP, follow previous instructions for editing PDP content or ratings.

- **Employee Review and Final Submission**
 - Employee enters Accessnet user name into the Accessnet User Name box and password into the Password box (this is the same User name and password used for TU mail) and then clicks “submit.”
 - This will open the employee’s home screen with a menu on the top of the computer screen and the status of the Performance Development Plan visible.
 - Review period and “Submitted for Employee Review” will appear under Status. Review period will also be visible.
 - Employee clicks Review period (which will turn from blue to red) and PDP sent from Reviewer will be visible for review.
 - Final rating and other pertinent information are provided in “PDP Details” section
 - Employee can then review PDP and add final comments.
 - To add comments, click “Edit PDP Details, use text box provided, and then click “Save.” Comments will appear in PDP Details section. Comments can also be added for Essential Functions, Goals, and Developmental Competencies by clicking on any of them.
 - Employee can then review the PDP by clicking the appropriate button and choosing either the “Reviewed and Agree” button or the “Reviewed and Disagree” button.
 - Reviewer will receive an email notice stating “If you choose not to make any changes, the PDP process is complete and the Human Resources Department now has it in its data base as a finalized PDP. You should now begin the next fiscal year’s PDP process.
 - If you choose to make any changes, you must first click on the “Revised Rated PDP” button in the PDP Details section. This ensures that the PDP will be returned to the employee for review after you have made modifications.”

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