Instructions for Completing Performance Development Plans on the Web System

Why A Web-Based PDS?

The PDS web-based system supports Temple University’s Performance Development System with simple, easy-to-use web-based software.

This software application is a tool that supports the efficient deployment of the PDS by:

1. replicating and automating the on-line Word document version of the Performance Development Plan;

2. aiding managers in fulfilling their performance management responsibilities by enabling them to review their employees’ Self Assessment Worksheets and to plan, develop, support, manage, document and appraise their employees’ work performance;

3. facilitating performance tracking by enabling managers to easily create, edit, manage, and review their employees' Performance Development Plans and to document and view progress notes and developmental activities completed during an evaluation period;

4. enabling supervisors to better manage performance by providing a method for identifying and documenting strengths and developmental areas;

5. supporting employee learning through automatic links to jobs and competency-based training and development programs;

6. providing employees with tools to create career paths by providing access to the competencies and educational requirements of other jobs at Temple University; and

7. enabling managers to complete their own Self Assessment Worksheet and review their own Performance Development Plans.

The PDP is comprised of the following sections:

- PDP Details- This section provides the name, department, position title and other pertinent data including information on the reviewer’s name, title, the evaluation period and comments. A calendar is provided to set the dates of the Planning Meeting and the Final Evaluation. The final rating also appears in this section.

- Performance Rating Categories

- Part I – Position Responsibilities

- Part II – Goals/Projects

- Part III Section A – Competency Development

- Part III Section B- Other Rated Competencies

- Supervisor/Employee Comments
Performance Rating Categories:

4  Performance consistently far exceeds expectations
3  Performance meets job expectations. GOOD SOLID PERFORMANCE
2  Performance meets minimal expectations and standards
1  Performance consistently fails to meet minimal expectations
0  No Rating Given

Getting Started: Creating an Employee’s PDP

- Log onto the application to bring up the Home Page. To log on, use Internet Explorer and connect to: https://pds.temple.edu
- Enter Accessnet user name into the User ID 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 a screen where you will click on “Manager.” This will open a Manager Home” welcome screen with a menu on the left side of the computer screen with links to the following:
  - My Annual Self Assessment
  - My Performance Development Plan
  - My Employees
    - My Employees’ Development Plans
    - My Employees’ Self Assessments
  - Temple Job Descriptions
  - My Career Path At Temple University
    - Current Job Postings
    - Human Resources Information
    - Job Families at Temple
  - Training Resources
    - Human resources Training
    - Computer Services Training
  - Training Guide
    - Manager Guide
  - Logout

- Information will appear on the right side of the screen on the status of the Self Assessment and the status of Performance Development Plans awaiting approval.
- Click “My Employee’s Performance Development Plan” link, which will bring up a list of departments if a supervisor has employees working in more than one department. If all employees are in the same department, a table listing direct and indirect reports will appear.
- Choose the department for review to bring up the Department screen.
- The Department screen lists employees that are under both the direct and indirect supervision of the manager.
- 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., Work in Progress, Submitted to Department Head for Review or Submitted to Employee Review.

Part I – Position Responsibilities
This section contains the essential functions designated as the employee’s responsibility. Essential Function information can be inserted from a word document PDP or from another document into this section by following these steps:

- copy the essential function information from the PDP word document
- click on “Add Essential Function”
- paste the Essential Function copy into the space provided
- click “Save”

Continue this process until all essential function information has been inserted into the web PDP.

On this same page Essential Functions may be edited and rated and information may be deleted.

To add dated progress notes:

- 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 Progress Notes are added
- click “Add” which will reveal an area in which Progress Notes may be added
- date Progress Notes by clicking on the calendar to the right of the “Creation Date” space
- save Progress Notes by clicking on “Save,” located on the right of the page
- clicking “Cancel” will delete your Progress Note entry and return you to the main document

Part II – Goals/Projects

This section contains the goals and projects assigned to an employee during an evaluation period. Goal/Project information can be inserted from a word document PDP or from another document by following these steps:

- copy the Goals/Project information from the word document
- click on “Add Goal”
- paste Goal/Projects copy for the space provided
- click “Save”

Continue this process until all Goal/Project information has been pasted from the word document into the web PDP. On this same page Goals/Projects may be edited and rated and information may be deleted.

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 right of the competency description
- selected competencies will move from Part III B to Part III A.

You may also create, copy, paste and edit Developmental Activities and Progress Notes by using the same process used for Essential Functions and Goals/Projects.
Final Rating

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.
- rating number will turn from blue to red, indicating that click on it will bring up the screen that will allow the item to be rated.
- Each item must be rated separately.

When Parts I, II and III of the Employee’s PDP are rated, the final rating will be electronically calculated and displayed in the PDP Details section.

Head of Department Review/Approval

- After all items have been rated and a planning meeting and final evaluation date also entered, click “Send to Department Head” (immediate supervisor) for review.
- 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.
- Once information is successfully sent to Department Head, the Supervisor may view a read-only version of the PDP.
- When Department Head signs on to the system and reaches the home page, there will be a message indicating that there is a PDP awaiting review. To view the PDP in read-only status, click on the Creation Date which will turn red.
- The Department Head is now able to review the PDP sent from the supervisor.
- To write a comment that will only be seen by the Supervisor, click "Edit PDP Details." A box will appear and comments can be written inside. To exit comment box, click "Save."
- To return to the supervisor, click "Sign Off and Return to Direct Supervisor.”

Supervisor Submission to Employee

- Supervisor signs onto system
- To review status of PDP sent back from Department Head, click "My Employee’s Performance Development Plans." Current PDP status will state "Reviewed by Department Head."
- To view Department Head’s comments, click employee’s name, click date, and then click “Click to View Department Head’s Comments.”
- To make changes to any area of the PDP, follow previous instructions for editing PDP content or ratings.
- To send PDP to employee, click “Submit to Employee.”

Employee Review and Final Submission

- Employee enters Accessnet user name into the User ID 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 left hand side of the computer screen and the status of the Self Assessment and the Performance Development Plan on the right.
- Employee clicks "My Performance Development Plan" on left side of screen
- Creation date and "Submitted for Employee Review” will appear under “Status” Review period will also be visible.
- Employee clicks creation date (which will turn from blue to red) and PDP sent from Supervisor will be visible for review.
- Final rating and other pertinent information are provided in "PDP Details” section
• Employee can then review PDP and add comments.
• To add comments, click "Edit PDP Details, use text box provided, then click "Save." Comments will appear in PDP Details section.
• Employee can then choose to review the PDP by clicking the appropriate button.

Annual Self-Assessment Section of PDP

The Annual Self Assessment is an optional Self-Assessment Worksheet designed to allow for employee input into performance planning and evaluation. The Self Assessment is composed of the following sections:

• Self Assessment Details section which includes the employee’s name, department, position, supervisor’s position, submission dates and status of each part of the SA
• Part 1 which is designed to provide an opportunity for employee to plan for the year and to be prepared to actively participate in the creation of the Performance Development Plan. This section is completed prior to meeting with one’s supervisor to discuss essential functions, goals/projects and competencies to be developed and evaluated in the fiscal year.
• Part 2 provides opportunity for employees to self-assess as preparation for the annual performance review meeting with their supervisors. It is to be completed and submitted prior to the scheduled review. In the event it has not been completed or submitted, the employee is to be prepared to discuss its content at the review meeting.

To create and submit Part 1 and Part 2 of the Self Assessment

• Log onto the application to bring up the Home Page. To log on, use Internet Explorer and connect to: https://pds.temple.edu
• Enter Accessnet user name into the User ID box and password into the Password box (this is the same User name and password used for TU mail)
• This will open a welcome screen with a menu on the left side of the computer screen. Click “My Annual Self Assessment” to bring up the Self Assessment screen.
• To complete Part 1 or Part 2, follow the same process as used in completing the Performance Develop Plan.
• To submit either Part 1 or Part 2, click on the appropriate button in the Self Assessment Details section.

Copy PDP

The Copy PDP Functionality allows a supervisor to duplicate a PDP for several employees, in one process. By navigating to the context of an existing PDP, the supervisor is able to create Performance Development Plans for direct reports that are selected using the current PDP as a template. This functionality will not copy ratings, progress notes or developmental activities.

• Navigate to an Employee’s PDP that has already been created
• Click on the Copy PDP button if visible. This button will not be visible if you have already created Performance Development Plans for your direct reports for the review period you are trying to copy from.
• Select the Direct Reports that you would like to create a PDP for. To select multiple Direct Reports hold the shift key and click simultaneously
• Click the Save button.
• Navigate to the Direct Reports selected to view their newly created Performance Development Plans.
Import Essential Functions

Import Essential Functions process allows a supervisor to import Essential Functions from an employee’s Performance Development Plan. This alleviates having to manually enter this information which tends to stay the same each year.

- Click on the "Create PDP for Future Review Period" button.
- Click on the “Import Essential Functions” button. This button will only appear if you have not added essential functions to the PDP and if the Pdp from the previous year has essential functions
- The page will refresh with the imported information