

Objective Setting Stage: Finalise PDR Form

This user guide provides instructions for a manager to finalise the PDR form and add competencies during (or after) the Objective Setting meeting with an employee.

(NB. The e-PDR system is designed to be viewed and updated on a laptop or desktop computer)

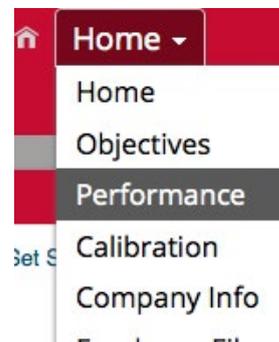
Section 1: Finalising the PDR form at the Objective Setting Meeting

During the Objective Setting meeting you should discuss each objective and any comments made by your employee before agreeing any changes and updating these. You should also discuss any content that your employee has added into the Personal Development Plan and Career Aspirations sections. At this stage, introduce the Salford Competencies and then add these into the form also.

Log in and Access your Form

1.1 Using the icon on your desktop, log into the e-PDR system with your username and password.

1.2 Click on the word 'Home' (top left of screen) and select 'Performance' from the drop down menu. The 'My Forms' screen will be displayed. Select your employee's PDR form from the list.



Update SMART Objectives

1.3 Hold the performance conversation with your employee. To help you discuss each **SMART** objective in turn, go to the 'Objective' section and view its full detail by clicking on the tabs to the right of each objective.

1.4 Enter comments or notes on your discussion in the free text box underneath each objective. You may prefer to enter brief notes now, save these, and then type them up more thoroughly after the meeting. **Important** – put the date next to any comment entered so that you can identify at a later stage in the cycle when you typed these.

1.5 To change or delete a **SMART** objective, click on the 'Pencil' or 'Dustbin' symbol next to the objective sentence to open the pop up window.



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1.6 To add milestones; In the pop up window click on the **'Add Milestone'** button containing the green plus symbol. You can then enter a target date and the content for that milestone. Click on the green plus symbol to add another. You can reorder milestones by clicking the blue arrows. When done, click **'Save changes'** to save and close the pop-up window. You can view the milestones in the PDR Form screen by clicking on the 'Other details' tab on the right.

Any updates you make to the 'status' field will be reflected on the coloured status indicator on the PDR Form (to the right of the objective).

1.7 To add an additional **SMART** objective, click on the words **'Add Objective'** on the far right of the **SMART** Objective section to open a new pop up window and input content.

Update Development Objectives or Career Aspirations

1.8 If agreed, you can add or amend an objective in your employee's 'Performance Development Plan' or 'Career Aspirations' sections by clicking on the words **'Add Objective'** on the right of each section, or **'edit'** next to the appropriate existing objective. Complete the free text boxes in the 'Add Development Objective' pop up window then click **'Save and Close'**.

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Development objective fields

Development objective – The wording of the development objective
Development methods - How it will be done, e.g. exam, shadowing, extra course, etc.

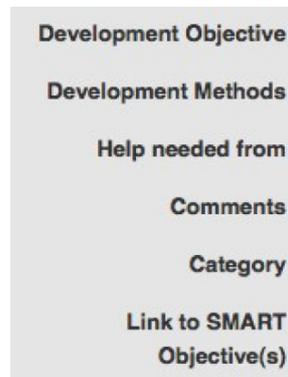
Help needed from – Who need to be contacted, e.g. companies, different department, manager

Comments – Any useful background information or considerations.

Category –Which type of development it is

Link to SMART Objective(s) – Which SMART objective this will help you achieve, e.g. 2.1.

Others' Rating **Objective Details** Other Details



Career Aspiration fields

Development objective – The wording of the career aspiration

Development method – How it will be done, e.g. exam, shadowing, training course, etc

Sources – Where it will be sourced from, e.g. specific provider

Review methods, dates and comments – All other useful information

Others' Rating **Objective Details** Other Details



Use the **'Delete'** buttons to delete a development objective or career aspiration if appropriate. Remember to save by clicking on the **'Save entire form'** icon as you work through the form (top right corner of the screen).



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Section 2: Finalise the form

Confirm the form

2.1 Review the form and ensure that any brief comments are now written clearly.

2.2 If you are satisfied with all objectives and comments, you now need to end the **SMART** Objective stage of the PDR process (*see below). Click on the '**Confirm Objectives**' button in the grey bar along the bottom of the screen. This will open up a confirmation screen.

2.3 Any comments you type into this confirmation screen text box will go into the email received by your employee to tell him/her that your form is ready to view. These comments will not be captured in the form itself. When happy with your email comments, click on the '**Confirm Objectives**' button. This will close the form and move it to the mid-point review stage of the cycle. The 'My Forms' screen will appear.

2.4 The PDR form will sit with your employee during the mid-point review window. You can see it by clicking on the '**Performance**' tab.

*Alternative option – to finalise the form after the meeting

You may wish to finalise the form after the meeting, e.g. if your meeting is cut short or you would prefer extra time to finalise the wording.

- Click '**Save and Close**' in the grey bar along the bottom of the screen to retain the form in your account for editing after the meeting. This will close the form and return you to the My Forms screen. You can log back in to your account at any point to continue editing.
- As this is a collaborative process, it's recommended that your employee gets to see any changes you've made to the **SMART** Objectives before you confirm these. Either run through them verbally with your employee, or select '**Save and Close**' at the bottom of the screen so that the employee can see them. The employee will need to advise you when they have so that you can finalise these – go back to step 2.2 above.

HINT - Alternatively if you are updating multiple forms you can click on 'the 'Send and Open Next Form' button to confirm the objectives and open up the form of your next employee.

Next Stage

The next step in the process is the mid-point review stage. Between now and then your employee will have the editing rights to their PDR form. You will need to set up a mid-point review meeting and review their form closer to the February/March mid-point meeting window. Your employee will route the form back to you for review closer to the time.

