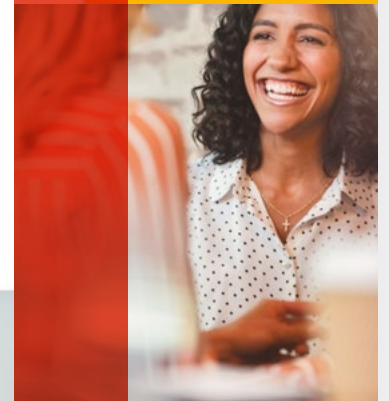




Ollscoil Chathair
Bhaile Átha Cliath
Dublin City University

Performance Review and Development (PRD)

Reviewee Training Manual 2020



HUMAN RESOURCES

Contact

W: learning.development@dcu.ie

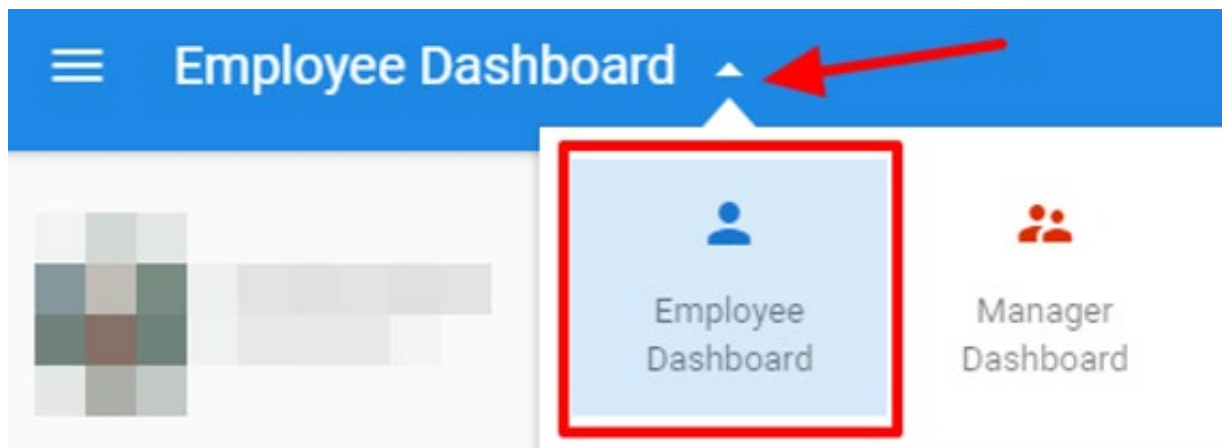
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Overview of the PRD Process

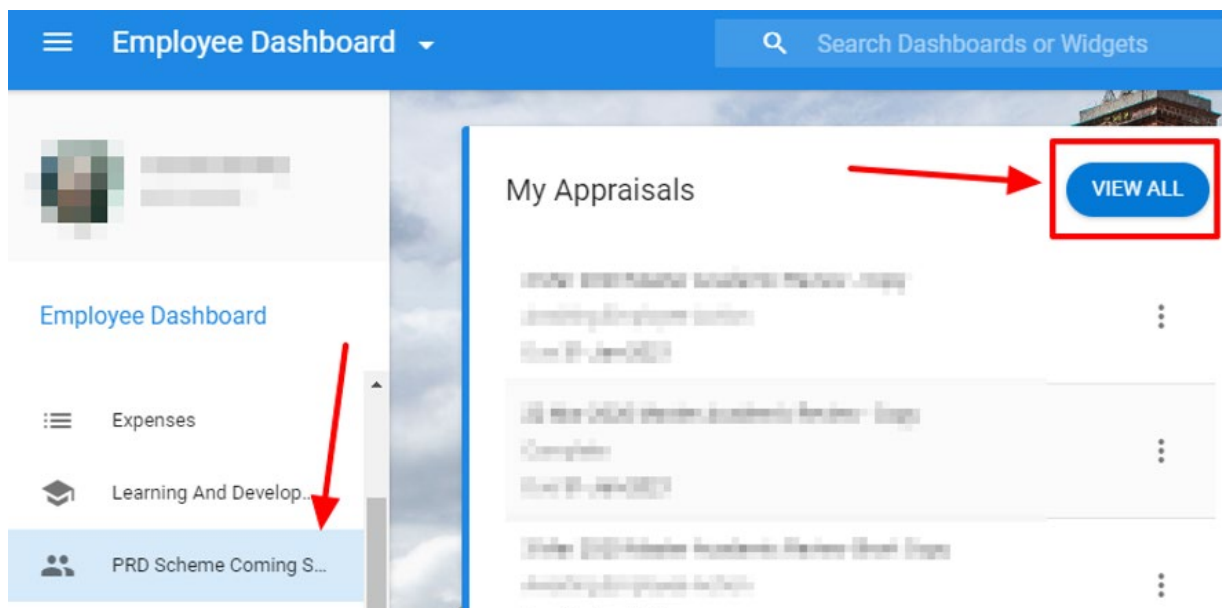
HOW TO COMPLETE A PRD REVIEW AS A REVIEWEE

Login to your core portal at [this link](#) using your standard DCU email username and password.

In Core HR, click the down arrow and select **Employee Dashboard**

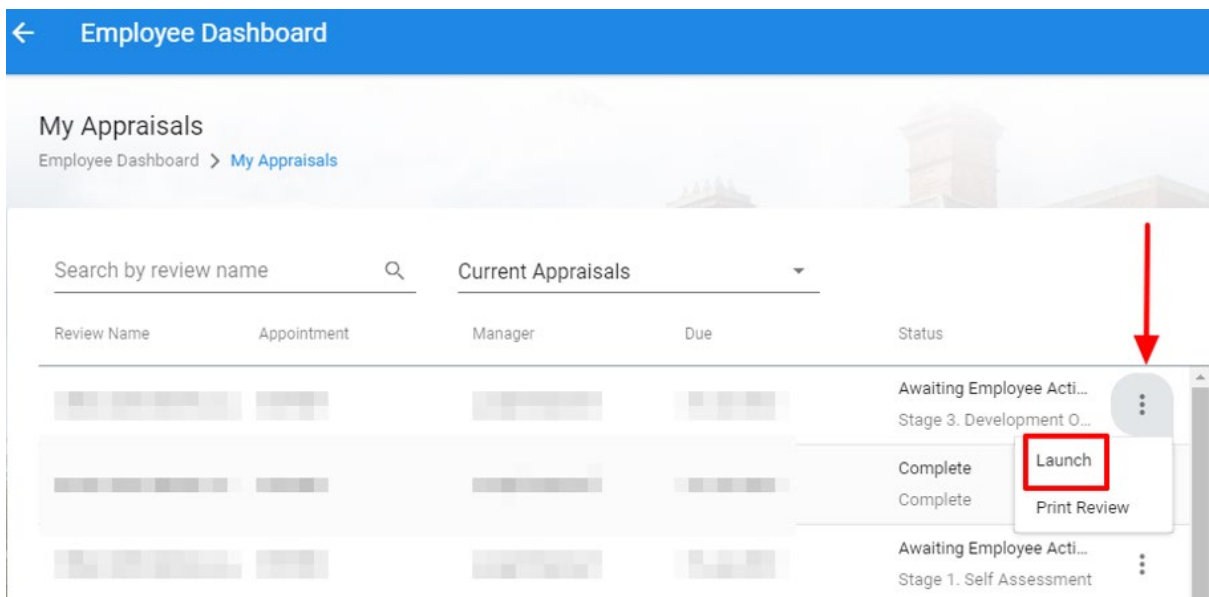


- 1 In this screen, you will see the status of all your reviews i.e. complete, in progress and overdue. In the left-hand column, select the **PRD** tab. Then click **View All** on the right-hand side to access your review.



Overview of the PRD Process

- 2** You will see your review in the View All screen.
To open the review, click the Ellipsis (...) button and select Launch.



NAVIGATING THE REVIEW SCREENS

There are four stages to the PRD process:

- 1** Self-assessment
- 2** Agreed Future objectives
- 3** Development Objectives
- 4** Overall Assessment

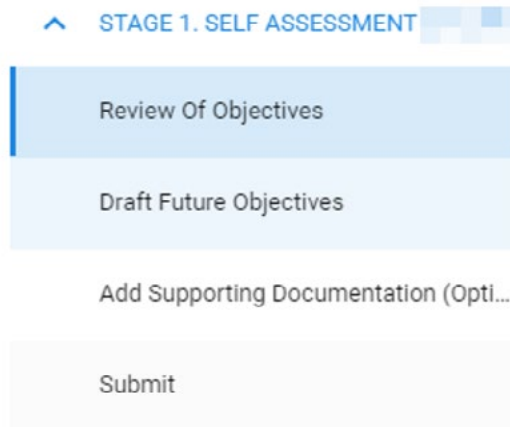
All four stages require sign off by both the Reviewer and the Reviewee in order to be submitted.

Stage 1 Self-Assessment will be completed by the Reviewee in advance of the PRD review meeting. To initiate this process, the Reviewer should contact the Reviewee to arrange a mutually convenient time for the review meeting. This should prompt the Reviewee to commence the self-assessment stage of the online PRD process.

Stage 1: Self-Assessment

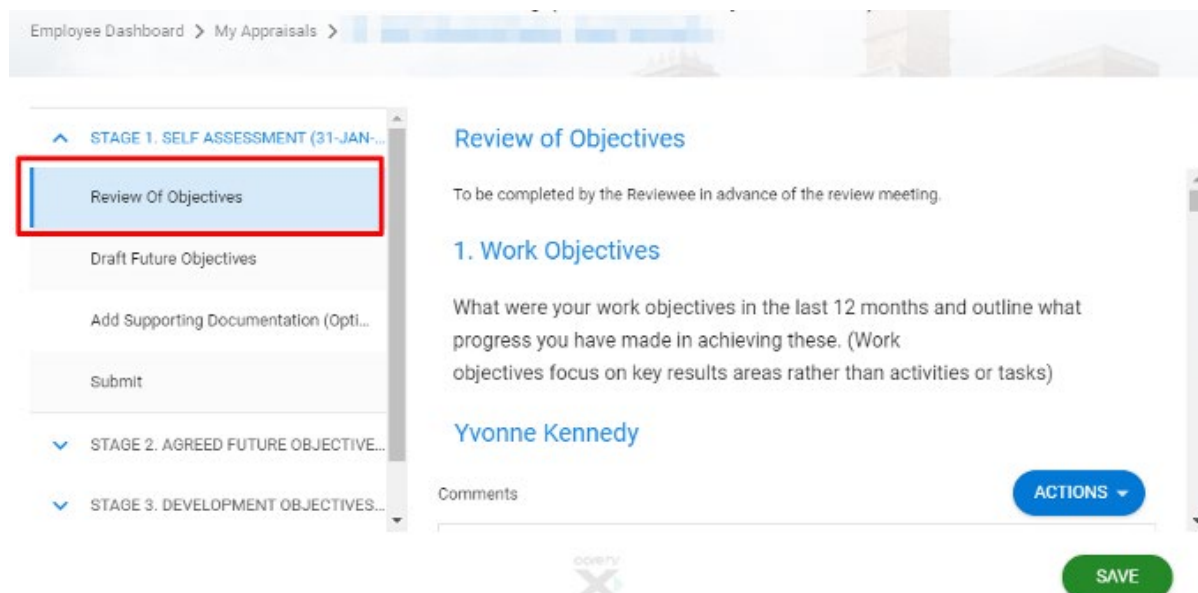
THERE ARE FOUR STEPS IN STAGE 1:

1. Review of Objectives
2. Draft Future Objectives
3. Add Supporting Documentation
4. Submit



Step 1: Review of Objectives

This section is completed in advance of the meeting by the Reviewee only. Details should be included on achieved objectives in the previous year under each heading provided. Remember to click the Save button regularly and before exiting the form in order to save any content entered. This section cannot be accessed by the Reviewer until completed and signed off (submitted) by the Reviewee.



Stage 1: Self-Assessment

Step 2: Draft Future Objectives

This section is completed by the Reviewee **only**, in advance of the meeting, and involves recording objectives for the **coming year**. Remember to click the **Save** button regularly, and before exiting the form, in order to save any content entered. This section cannot be accessed by the Reviewer until completed and signed off (submitted) by the Reviewee.

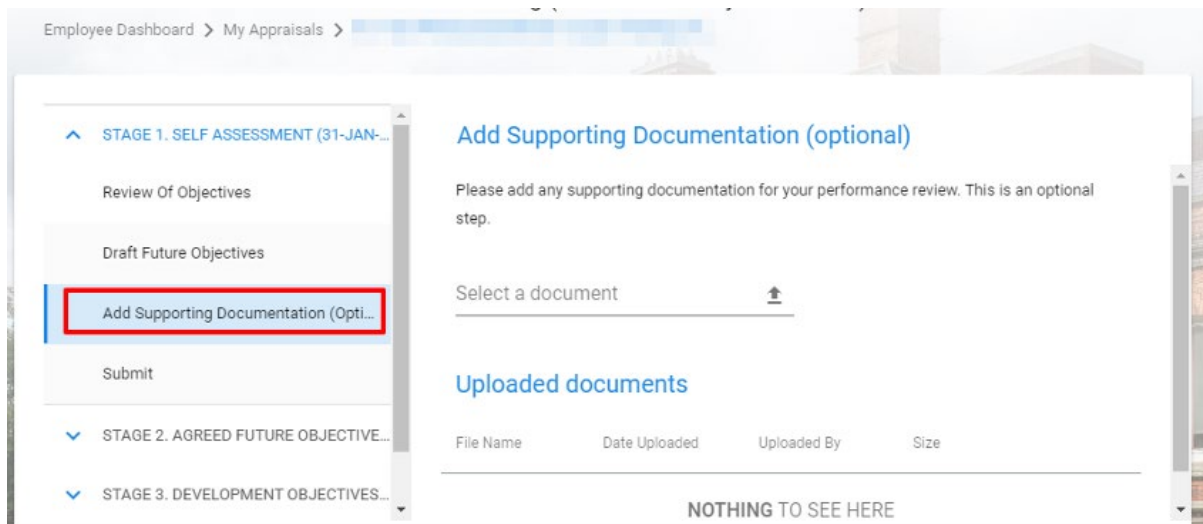
Note: Steps 2 and 3, once completed and signed off by the Reviewee, form the basis of the Review discussion and should be read by the Reviewer in advance of the meeting. To facilitate this, the Review of Objectives and Draft Future Objectives should be submitted to the Reviewer at least one week in advance of the review meeting.

The screenshot shows a web application interface for 'Draft Future Objectives'. At the top, there is a breadcrumb trail: 'Employee Dashboard > My Appraisals > ...'. Below this is a navigation menu with several items: 'STAGE 1. SELF ASSESSMENT (31-JAN-...', 'Review Of Objectives', 'Draft Future Objectives' (highlighted with a red box), 'Add Supporting Documentation (Opti...', 'Submit', 'STAGE 2. AGREED FUTURE OBJECTIVE...', and 'STAGE 3. DEVELOPMENT OBJECTIVES...'. The main content area is titled 'Draft Future Objectives' and contains the text: 'Please give some preliminary indications regarding your objectives for the coming year.' Below this is a section titled '1. Work Objectives' with the text: 'Please give some preliminary indications of your work objectives in the next 12 months. (Work Objectives focus on key result areas rather than activities or tasks)'. The name 'Yvonne Kennedy' is displayed. At the bottom right, there is a blue 'ACTIONS' button and a green 'SAVE' button. A 'Comments' section is visible at the bottom left.

Stage 1: Self-Assessment

Step 3: Add Supporting Documentation

This is an optional step. Reviewees can upload any supporting document that they think may be relevant to the performance review.

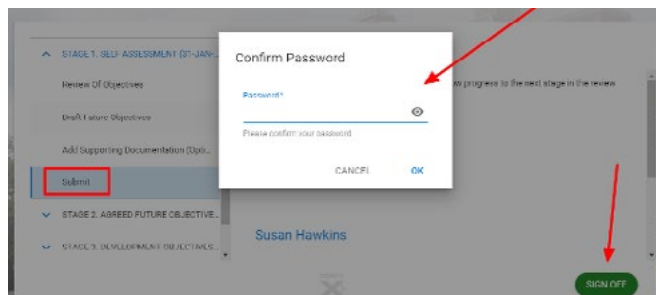


Step 4: Submit

This screen allows the Reviewee to sign off their Review of Objectives and Draft Future Objectives. Once signed off (submitted), the contents are available for the Reviewer to read.

The Reviewer then has the option to sign off and the review can progress to the next stage or, alternatively, the Reviewer can request further information or clarification from the Reviewee prior to signing off. An email is generated by the system and a notification flag in the Employee Dashboard indicates whether the self-assessment review has been signed off or returned for further information. Once the additional information has been provided to the Reviewer, both parties can sign off and progress to the next stage.

To sign off (submit) Stage 1, enter your password when requested and progress to the next stage of the review.



Stage 2: Agreed Future Objectives

THERE ARE TWO STEPS IN STAGE 2:

1. Agreed Future Objectives
2. Submit

Step 1. Agreed Future Objectives

This section is completed by the Reviewee during or after the meeting. Note that once the data has been entered and saved in this section, it will be immediately available to view by both the Reviewer and the Reviewee.

^ STAGE 2. AGREED FUTURE OBJECTIVES (...)

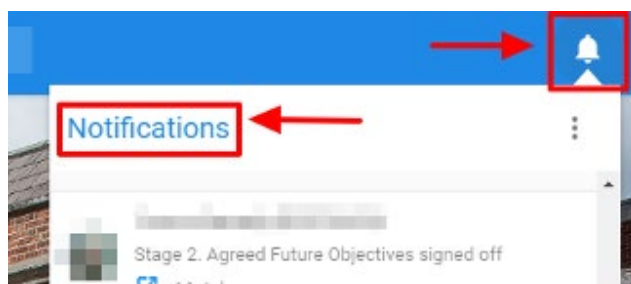
Agreed Future Objectives

Submit

Step 2. Submit

The Reviewee should sign off on the Agreed Future Objectives. This generates a notification in the Reviewer's Dashboard that the Agreed Future Objectives has been signed off and submitted.

The Reviewer then has the option to sign off and progress to the next stage or, alternatively, the Reviewer can request further information or clarification from the Reviewee prior to signing off. An email is generated by the system and a notification flag in the Employee Dashboard indicates whether the self-assessment review has been signed off or returned for further information. Once the additional information has been provided to the Reviewer, both parties can sign off and progress to the next stage.



Stage 3: Development Objectives

THERE ARE FOUR STEPS IN STAGE 3:

1. Planning for Development
2. Compliance Training
3. Book a Course (Reviewee only)
4. Submit

Step 1: Planning for Development

This section is completed by the Reviewee and should include learning and development objectives agreed at the review meeting.

The screenshot shows the 'Employee Dashboard > My Appraisals' interface. On the left, a sidebar lists four stages: 'STAGE 1. SELF ASSESSMENT (31-JAN-...)', 'STAGE 2. AGREED FUTURE OBJECTIVE...', 'STAGE 3. DEVELOPMENT OBJECTIVES...', and 'Submit'. Under 'STAGE 3', the 'Planning For Development' option is highlighted with a red box. The main content area is titled 'Planning for development' and includes the text: 'To be completed by the Reviewee after the review meeting.' Below this is a sub-section '1. Learning and Development Objectives' with the instruction: 'What are your agreed learning and development objectives for the next 12 months. Please outline what actions you will take to progress these.' The reviewer's name 'Yvonne Kennedy' is displayed. At the bottom right, there is a blue 'ACTIONS' button and a 'Comments' field.

Step 2: Compliance

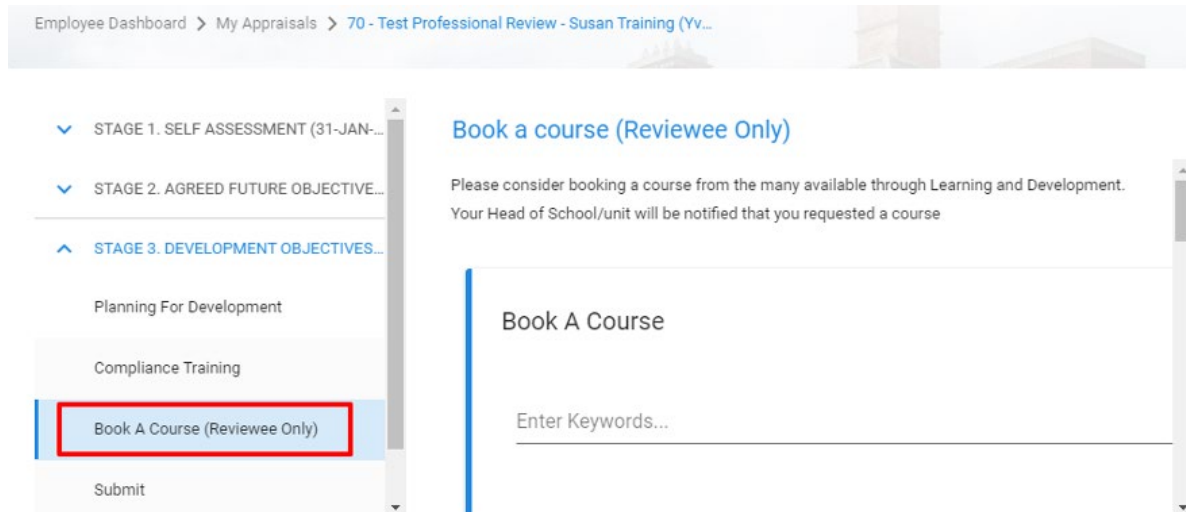
This section is completed by the Reviewee and includes any compliance training relevant to their role, which will be undertaken in the coming year as agreed at the review meeting.

The screenshot shows the 'Employee Dashboard > My Appraisals' interface. On the left, the sidebar is the same as in the previous screenshot, but 'Compliance Training' is now highlighted with a red box. The main content area is titled 'Compliance Training' and includes the text: 'To be completed by the Reviewee after the review meeting.' Below this is a sub-section '1. Compliance Training' with the instruction: 'What compliance training (required for your role) will you undertake in the next 12 months? Please refer to the list of compliance training on the DCU Learning and Development website.' The reviewer's name 'Yvonne Kennedy' is displayed. At the bottom right, there is a blue 'ACTIONS' button and a 'Comments' field.

Stage 3: Development Objectives

Step 3: Book a Course (Reviewee only)

In this section, the Reviewee may book a course or identify a training gap - this is an optional step.



The screenshot shows a web interface for 'Employee Dashboard > My Appraisals > 70 - Test Professional Review - Susan Training (Yv...)'. On the left is a sidebar with a navigation menu. The menu items are: 'STAGE 1. SELF ASSESSMENT (31-JAN-...)', 'STAGE 2. AGREED FUTURE OBJECTIVE...', 'STAGE 3. DEVELOPMENT OBJECTIVES...' (which is expanded), 'Planning For Development', 'Compliance Training', 'Book A Course (Reviewee Only)' (highlighted with a red box), and 'Submit'. The main content area is titled 'Book a course (Reviewee Only)'. It contains the text: 'Please consider booking a course from the many available through Learning and Development. Your Head of School/unit will be notified that you requested a course'. Below this is a section titled 'Book A Course' with a text input field labeled 'Enter Keywords...'. The input field is currently empty.

Step 4: Submit

The Reviewee now signs off on Stage 3 and the Reviewer will receive notification by email as well as a notification in their Manager dashboard in core portal.

The Reviewer then has the option to sign off and progress to the next stage or, alternatively, the Reviewer can request further information or clarification from the Reviewee prior to signing off. An email will be generated by the system and a notification flag in the Employee Dashboard in Core portal will indicate whether the self-assessment review has been signed off or returned for further information. Once the additional information has been provided to the Reviewer, both parties can then sign off and progress to the next stage.


Stage 4: Overall Assessment

THERE ARE TWO STEPS IN STAGE 4:

1. Outcome of Review Meeting
2. Sign off

Step 1: Outcome of Review Meeting

In this section, the Reviewer provides an overall Performance Review and Development (PRD) assessment in line with the Review meeting discussion.



The screenshot shows a user interface for a performance review. At the top, there is a breadcrumb trail: "Employee Dashboard > My Appraisals > [Review Title]". Below this is a navigation menu with four stages: "STAGE 1. SELF ASSESSMENT (31-JAN-20...", "STAGE 2. AGREED FUTURE OBJECTIVES (...)", "STAGE 3. DEVELOPMENT OBJECTIVES (3...", and "STAGE 4. OVERALL ASSESSMENT (31-JA...". The "Outcome Of Review Meeting" link under Stage 4 is highlighted with a red box. The main content area is titled "Outcome of Review Meeting" and "1. Overall Assessment". It contains a paragraph: "The Reviewee should confirm completion of all 3 stages of the review process. The Reviewer should provide an overall Performance Review and Development (PRD) assessment in line with the review meeting discussion." Below this is the name "Yvonne Kennedy" and a "Sign Off" button. There is also a "Comments" section with a text input field and an "ACTIONS" dropdown menu.

- The Reviewee should now confirm that they have completed all the previous stages of the review.
- The Reviewer provides an overall assessment of the review.

Step 2: Sign off

This screen allows the Reviewer and the Reviewee to sign off on the overall assessment. Both parties must sign off (Reviewee first). This is the final stage of the review.