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Dublin City University

Performance Review and Development (PRD) Reviewer Training Manual 2020



HUMAN RESOURCES

Contact

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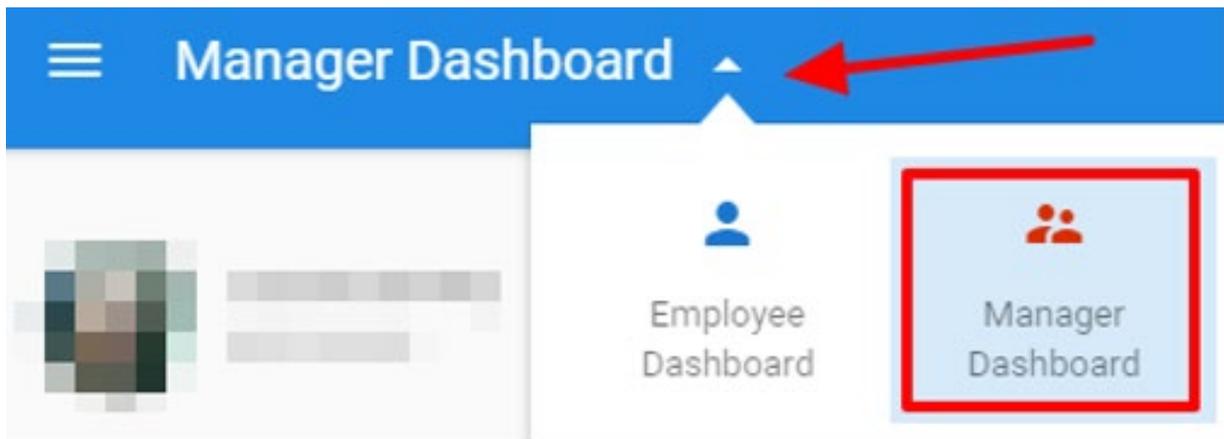
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Overview of the PRD Process

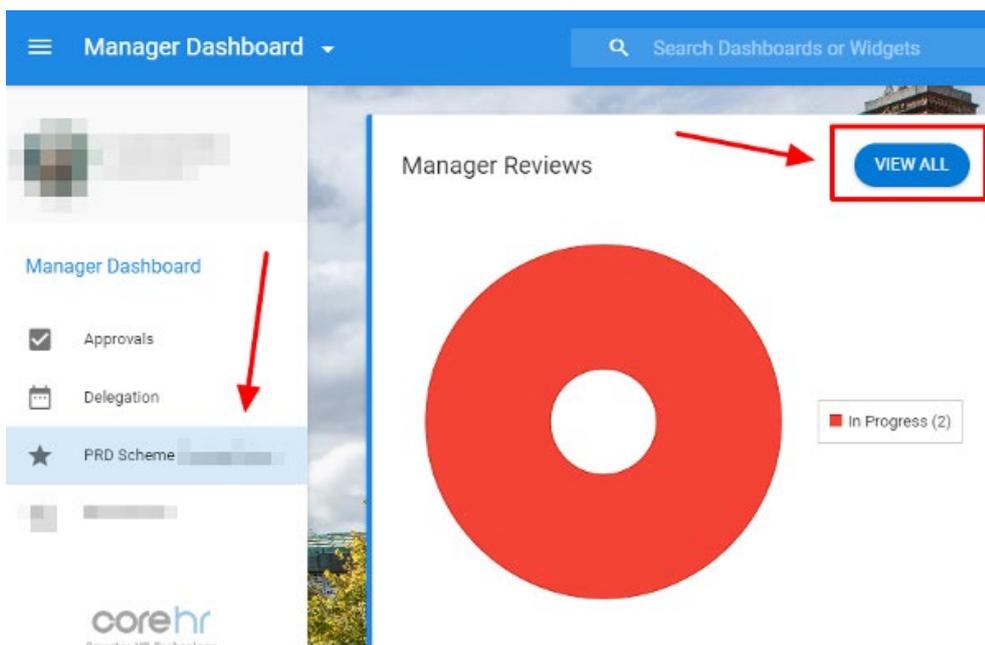
HOW TO COMPLETE A PRD REVIEW AS A REVIEWER

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 **Manager Dashboard**

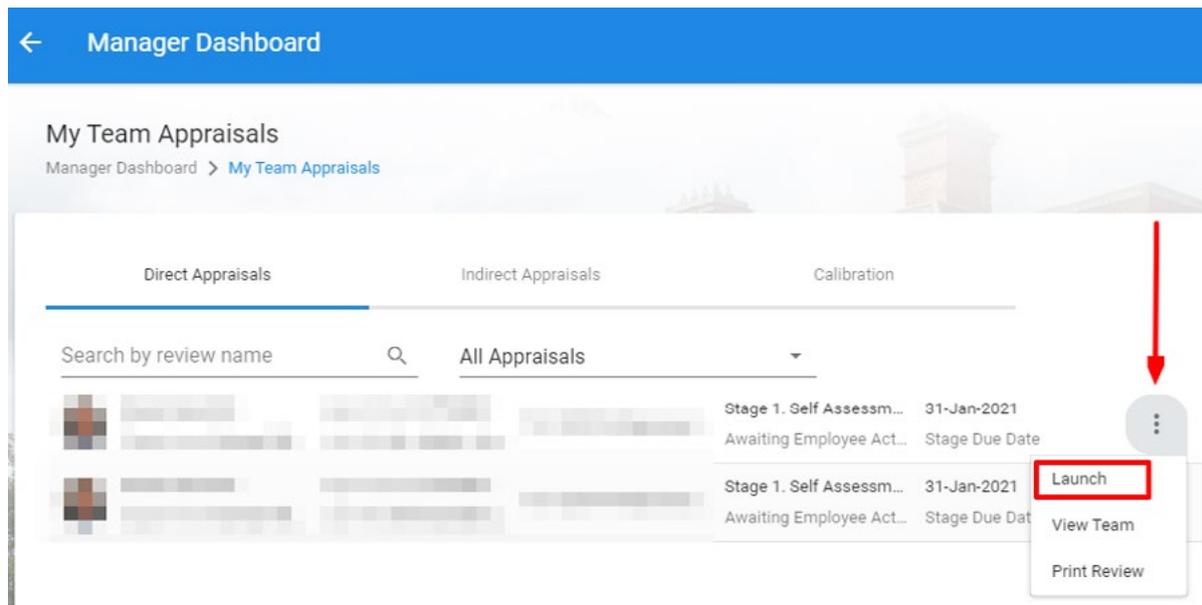


- 1 You will be brought to a screen that shows the status of all reviews assigned to you as the Reviewer i.e. complete, in progress and overdue. In the left-hand column, select the PRD tab. Then click View All on the right-hand side to access all assigned reviews.



Overview of the PRD Process

2 The 'View All' screen lists all allocated Reviewees. To select the review you wish to open, 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

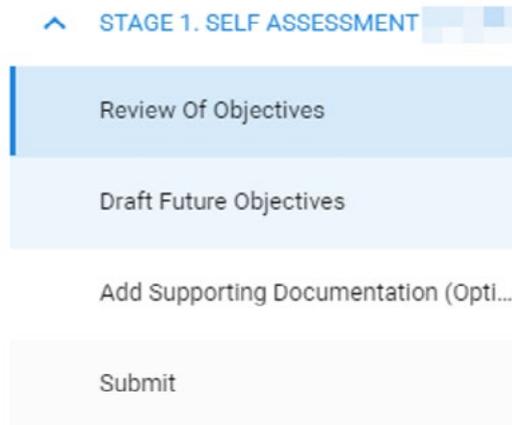
All four stages require sign off by both the Reviewer and the Reviewee in order to be submitted.

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

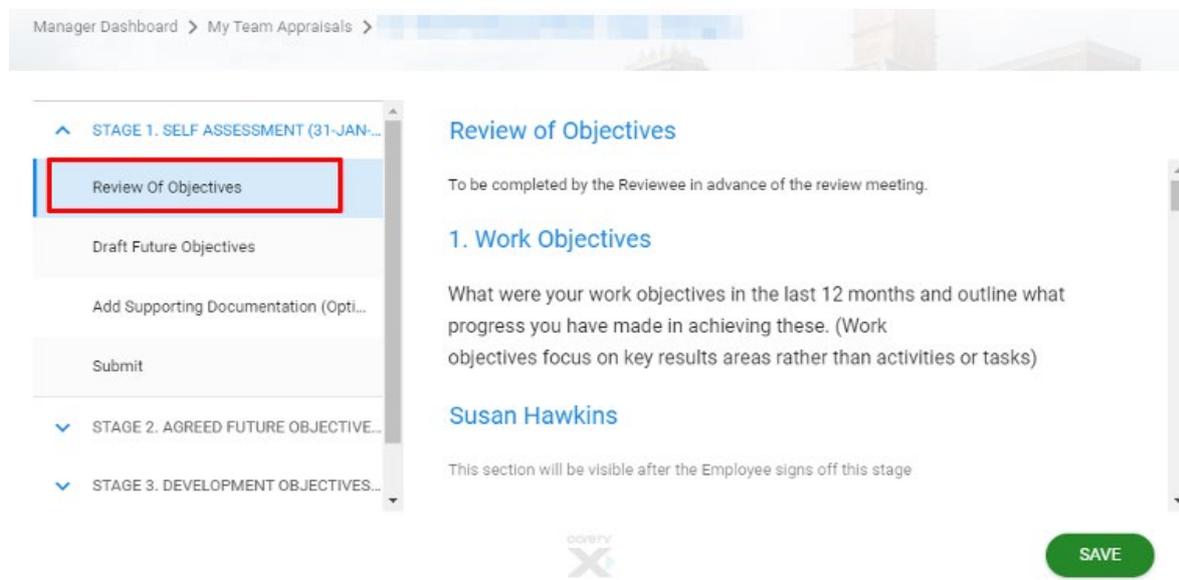
THERE ARE FOUR STEPS IN STAGE 1:

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 review meeting by the Reviewee only. Under each heading provided, the reviewee includes details of their objectives and achievements in the previous year. This section is not accessible 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 review meeting, and includes their objectives for the **coming year**. This section is not accessible by the Reviewer until completed and signed off (submitted) by the Reviewee.

Note: Steps 2 and 3, once completed, form the basis of the Review discussion and should be read by the Reviewer in advance of the meeting.

The screenshot shows the 'Draft Future Objectives' stage of the performance review process. On the left, a navigation menu lists 'STAGE 1. SELF ASSESSMENT (31-JAN-...)' with sub-items: 'Review Of Objectives', 'Draft Future Objectives' (highlighted with a red box), 'Add Supporting Documentation (Opti...', and 'Submit'. Below this are '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.' followed by '1. Work Objectives' and '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 'Susan Hawkins' is displayed, with a note: 'This section will be visible after the Employee signs off this stage'. A green 'SAVE' button is located at the bottom right.

Step 3: Add Supporting Documentation

This is an optional step for Reviewees **only**, which allows the uploading of any supporting documents they think are relevant to their performance review. Uploaded documents are visible to the Reviewer once the Reviewee has signed off (submitted) stage 1.

The screenshot shows the 'Add Supporting Documentation (optional)' stage. The navigation menu on the left highlights 'Add Supporting Documentation (Opti...' with a red box. The main content area is titled 'Add Supporting Documentation (optional)' and contains the text: 'Please add any supporting documentation for your performance review. This is an optional step.' Below this is a 'Select a document' field with an upload icon. Underneath is a section titled 'Uploaded documents' with a table header: 'File Name', 'Date Uploaded', 'Uploaded By', and 'Size'. The table is currently empty, displaying 'NOTHING TO SEE HERE' at the bottom.

Stage 1: Self-Assessment

Step 3: Submit

The Reviewer should receive a notification in the Manager Dashboard in Core portal that the self-assessment review has been signed off and submitted by the reviewee (it may take 20 minutes to appear in portal notifications). In addition, the system generates an email indicating that the Reviewee has signed off (submitted) Stage 1.

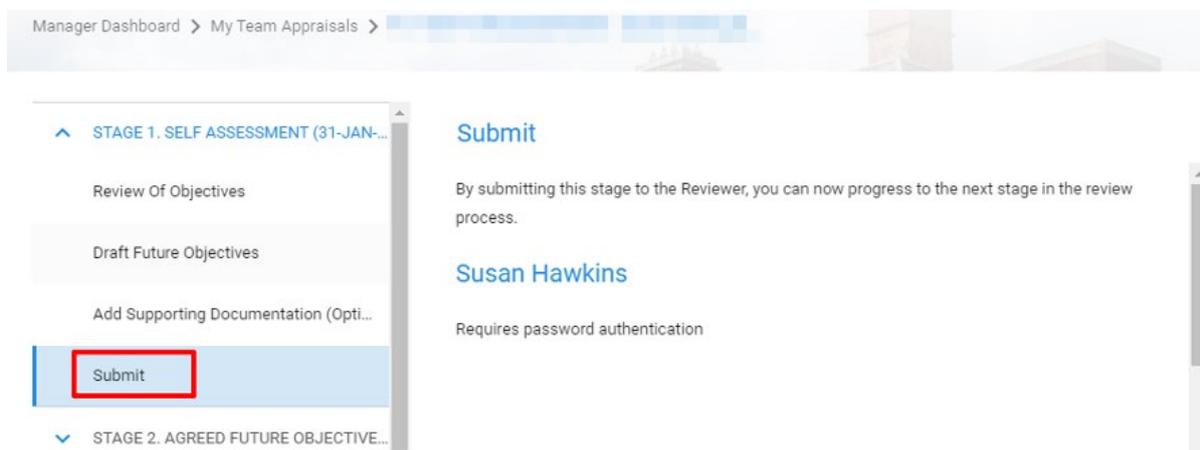
To access the content entered by the Reviewee in Stage 1 of the Review, go to the tab on the **Manager Dashboard** in core portal and launch the review.

- In Core HR, click the down arrow and select **Manager Dashboard**
- You will be brought to a screen that shows the status of all reviews assigned to you as the Reviewer 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 all assigned reviews.
- The '**View All**' screen lists all allocated Reviewees. To select the review you wish to open, click the **Ellipsis (...)** button and select **Launch**.

Once you have launched the review:

- Check that the Reviewee has entered all the required data in steps 1 and 2.
- Go to step 3 where there are two options:
 - a) sign off on the self-assessment and move to the next stage or
 - b) send back the review to the Reviewee for additional information or clarification
- If the review has been returned to the Reviewee for further information, they must complete and sign off on (submit) the revised version in order to move to the next stage. When the updated review has been submitted, a notification of this appears in core portal and an email is generated.

The Reviewer should now sign off on Stage 1 - and enter their password when requested to do so in order to progress to the next stage of the review.



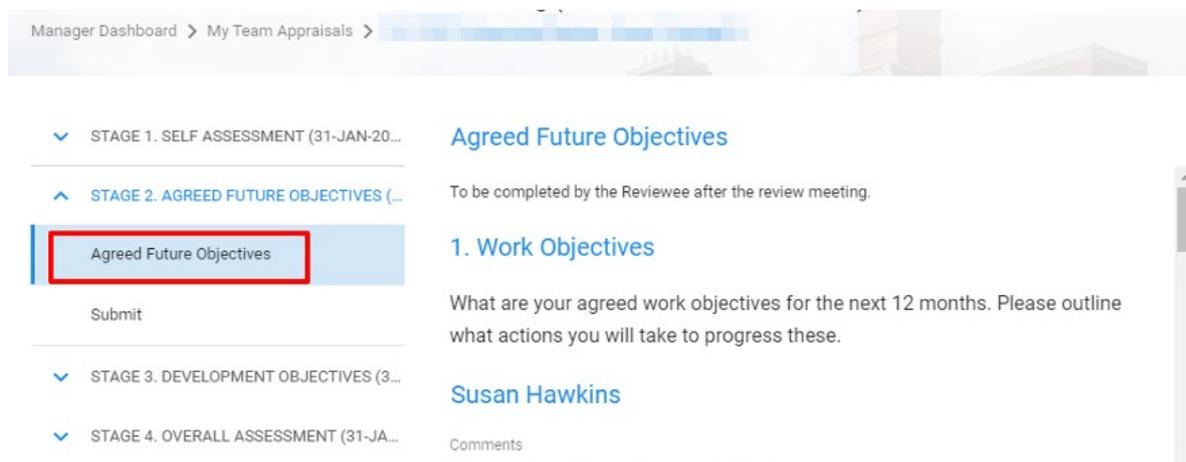
Stage 2: Agreed Future Objectives

THERE ARE TWO STEPS IN STAGE 2:

1. Agreed Future Objectives
2. Submit

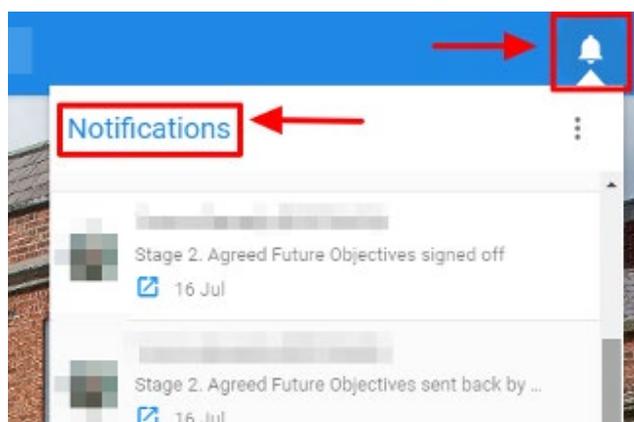
Step 1. Agreed Future Objectives

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.



Step 2. Submit

The Reviewer should receive a notification in the Manager Dashboard in Core portal that the Agreed Future Objectives have been signed off and submitted by the reviewee (it may take 20 minutes for this to appear in portal notifications). In addition, the system generates an email indicating that the Reviewee has signed off (submitted) Stage 2.



Stage 2: Agreed Future Objectives

To access the content entered by the Reviewee in Stage 2 of the Review, go to the tab on the **Manager Dashboard** in core portal and launch the review.

- In Core HR, click the down arrow and select **Manager Dashboard**
- You will be brought to a screen that shows the status of all reviews assigned to you as the Reviewer 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 all assigned reviews.
- The '**View All**' screen lists all allocated Reviewees. To select the review you wish to open, click the **Ellipsis (...)** button and select **Launch**.

Once you have launched the review:

- Check that the Reviewee has entered all the required information.
- Go to step 2 where there are two options
 - (a) sign off on the Agreed Future Objectives and move to the next stage or
 - (b) send back the review to the Reviewee for additional information or clarification
- If the review has been returned to the Reviewee for further information, they must complete and sign off on (submit) the revised version in order to move to the next stage. When the updated review has been submitted, a notification of this appears in core portal and an email is generated.

The screenshot shows the 'Manager Dashboard > My Team Appraisals' interface. On the left, a sidebar lists stages: 'STAGE 1. SELF ASSESSMENT (31-JAN-...)' with sub-items 'Review Of Objectives', 'Draft Future Objectives', and 'Add Supporting Documentation (Opti...)', and 'STAGE 2. AGREED FUTURE OBJECTIVE...' with a 'Submit' button highlighted in a red box. Below it are 'STAGE 3. DEVELOPMENT OBJECTIVES...'. On the right, the 'Submit' section contains the text: 'By submitting this stage to the Reviewer, you can now progress to the next stage in the review process.' Below this, the name 'Susan Hawkins' is displayed with the note 'Requires password authentication'. At the bottom, the name 'Yvonne Kennedy' is visible.

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 'Planning for development' section of the appraaisal system. The left-hand navigation menu is visible, with 'Planning For Development' highlighted and circled in red. The main content area displays the title 'Planning for development' and a sub-section '1. Learning and Development Objectives'. The text below asks the reviewee to outline learning and development objectives for the next 12 months. The name 'Susan Hawkins' is shown, along with a comment stating 'The employee has not responded to t...'. The breadcrumb trail at the top reads 'Manager Dashboard > My Team Appraisals >'.

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 'Compliance Training' section of the appraaisal system. The left-hand navigation menu is visible, with 'Compliance Training' highlighted and circled in red. The main content area displays the title 'Compliance Training' and a sub-section '1. Compliance Training'. The text below asks the reviewee to outline compliance training for the next 12 months. The name 'Susan Hawkins' is shown, along with a comment stating 'The employee has not responded to t...'. The breadcrumb trail at the top reads 'Manager Dashboard > My Team Appraisals >'.

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 'Book a course (Reviewee Only)'. On the left is a vertical navigation menu with the following items: '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)' and 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 large text input field with the placeholder text 'Enter Keywords...'.

Step 4: Submit

This screen allows the Reviewer and the Reviewee to sign off on the Development objectives. Both parties must sign off (Reviewee first) at this point in order to progress to the next stage of the review. The Reviewer receives a notification in the Manager Dashboard in Core portal and an email is generated indicating that Development Objectives (Stage 3) have been signed off by the reviewee.

To access the content entered by the Reviewee in Stage 3 of the Review, go to the tab on the **Manager Dashboard** in core portal and launch the review.

- In Core HR, click the down arrow and select **Manager Dashboard**
- You will be brought to a screen that shows the status of all reviews assigned to you as the Reviewer 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 all assigned reviews.
- The 'View All' screen lists all allocated Reviewees. To select the review you wish to open, click the Ellipsis (...) button and select **Launch**.

Once you have launched the review:

- Check that the Reviewee has entered all the required data.
- Go to step 4 where there are two options:
 - a) sign off on the Development Objectives and move to the next stage or
 - b) send back the review to the Reviewee for additional information or clarification
- If the review has been returned to the Reviewee for further information, they must complete and sign off on (submit) the revised version in order to move to the next stage. When the updated review is submitted, a notification of this appears in core portal and an email is generated.

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 should provide an overall Performance Review and Development (PRD) assessment in line with the Review meeting discussion.

Remember to press the 'save' button regularly and when exiting the form to ensure no data is lost.

Manager Dashboard > My Team Appraisals > [Progress Bar]

- STAGE 1. SELF ASSESSMENT (31-JAN-20...)
- STAGE 2. AGREED FUTURE OBJECTIVES (...)
- STAGE 3. DEVELOPMENT OBJECTIVES (3...)
- STAGE 4. OVERALL ASSESSMENT (31-JA...)

Outcome Of Review Meeting

Sign Off

Outcome of Review Meeting

This section should be completed by the Reviewee and the Reviewer after the review meeting.

1. Overall Assessment

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.

Susan Hawkins

This section will be visible after the Employee signs off this stage

- 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.