

PLANNING & PERFORMANCE PHASES OF THE e-PDP SYSTEM


2017/2018



PLANNING → PERFORMANCE → MID YEAR CHECK-IN → PERFORMANCE → ASSESSMENT → REVIEW

PLANNING PHASE (1)

EMPLOYEE: GOALS

1. Access the e-PDP tool via the Performance and Development Planning page on the [HR website](#) or via the link under 'Employee Tools' when you're signed on to the website
2. Log in using the **single sign-on** option to the right
3. Click onto the **PROFILE ICON**  to the right of the purple toolbar and choose **TOTAL TALENT PROFILE**
4. Open the current appraisal in Phase: PLANNING
5. There are four main tabs within the appraisal. Choose the **GOALS** tab between the Core Competencies & Summary tabs
6. Choose **ADD GOAL** button to the far right of the screen.
 - a. Create a name for your GOAL, briefly describe it and click **NEXT**. The Score Type is defaulted to SCALE.

** Note: goals cannot be edited until they are approved by the hiring manager first*
 - b. The visibility of GOALS is defaulted to PRIVATE so that an individual's personal goals are not populated within the RRU Global Goal Library. Leave as PRIVATE and click **NEXT**.
 - c. A **TARGET DATE** can be added if needed
 - d. REVIEW and click **FINISH**

** HINT: The GOALS section can be where you can add your PROFESSIONAL DEVELOPMENTAL opportunities with hyperlinks to courses from Continuing Studies or Lynda.com!*
7. Employee informs manager that they have added their goals (if applicable).

MANAGER: GOALS & COMPETENCIES

8. Hiring manager clicks on **MY EMPLOYEES** from the purple toolbar and chooses the appropriate appraisal
9. Manager clicks on the drop-down beside **GOALS PENDING REVIEW** from the employee's main appraisal window, and if populated, manager reviews and approves/rejects the goals which their employee has added for themselves

10. Manager clicks on the **GOALS** tab and adds goals for their employee
11. Once the manager has added and approved all GOALS, they **MUST** click on **MANAGE WEIGHTS** to ensure the total of all goals equal 100%.
12. When GOALS are complete, the manager clicks on the **CORE COMPETENCIES** tab
13. Choose **MANAGE COMPETENCIES** to the far right of the window
14. Click on the **GREEN+** buttons to choose applicable competencies (manually adjusting the weightings if desired) and when finished, **SCROLL TO THE BOTTOM OF THE WINDOW AND CLICK SUBMIT**
15. For each CORE COMPETENCY, the manager and employee can add a **JOURNAL ENTRY** to provide clarification and more detail.
16. On the main APPRAISAL INFORMATION tab, both manager and employee can add a **JOURNAL ENTRY** to the GENERAL APPRAISAL NOTES section immediately under PHASE SIGNATURE REQUIREMENTS. This is a great place to add certificates, accolades, etc, that aren't directly related to a specific competency and goal.

MANAGER & EMPLOYEE: SIGNATURES

17. When all GOALS, COMPETENCIES and JOURNAL ENTRIES have been made, the manager is alerted to **SIGN** the appraisal.
18. Once signed, the employee is notified that it is their turn to review the final planning phase, discuss further with manager if needed, and then **SIGN** the appraisal.
19. Once both signatures are complete, the appraisal is ready to be moved to the next phase (either manually by the manager or automatically end of day June 30, 2017)

PERFORMANCE PHASE (2)

WORK THE PLAN

- Day to day work, day to day conversations, special projects, ad hoc assignments, unplanned events
 - Document highlights, progress/updates through *PDP journal entries*
- Regular Meaningful Conversations
 - Document the important points or outcomes through *PDP journal entries*
- Achievement of developmental and work goals
 - Document through *PDP journal entries*... and celebrate successes along the way!!!

****Stay tuned for more training in the fall on the other phases of the e-PDP system!***