Performance Review and Development Program

Employee User Guide

Prepared by:
PageUp People and Human Resources

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Performance Review and Development Program Overview

Welcome to the Performance Review and Development Program (PRDP). This document is designed to take you step by step through the planning, monitoring and review stages and steps of your Performance Review and Development Plan cycle. The PRDP cycle is a seven step cycle outlined below.

<table>
<thead>
<tr>
<th>Stage 1: Performance and Professional Development Planning</th>
<th>Employee drafts objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>October – February</td>
<td>Employee drafts performance objectives in the Performance Plan and development objectives in the Professional Development Plan.</td>
</tr>
<tr>
<td></td>
<td>PRDP Supervisor confirms objectives with employee</td>
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<tr>
<td></td>
<td>PRDP Supervisor reviews and amends performance and development objectives for employee. PRDP Supervisor meets with the employee to confirm and reach agreement on the objectives.</td>
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<tr>
<td></td>
<td>Employee signs off on objectives</td>
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<tr>
<td></td>
<td>Employee signs off on the agreed performance and development objectives.</td>
</tr>
</tbody>
</table>

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<th>Stage 2: Monitoring Objectives</th>
<th>Monitoring Objectives</th>
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<tr>
<td>March – September</td>
<td>The employee and/or PRDP Supervisor can enter comments and link journal entries as and when required. PRDP Supervisor and employee are required to meet formally at least once during this step to monitor the employee's progress, provide and/or receive feedback, review objectives and identify any issues that may impact on the currency of objectives.</td>
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<th>Stage 3: Performance and Professional Development Review</th>
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<td>Employee conducts a self-assessment reflecting on achievements and any mitigating circumstances that may have impacted on performance and professional development.</td>
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<tr>
<td></td>
<td>PRDP Supervisor conducts an assessment</td>
</tr>
<tr>
<td></td>
<td>PRDP Supervisor conducts an assessment of the employee's performance and professional development. PRDP Supervisor meets with employee to provide feedback on the employee's achievement or non-achievement of objectives during the PRDP cycle.</td>
</tr>
<tr>
<td></td>
<td>Employee signs off on final review</td>
</tr>
<tr>
<td></td>
<td>Employee signs off on the final review of the PRDP cycle.</td>
</tr>
<tr>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td></td>
<td>PRDP has been completed for this cycle.</td>
</tr>
</tbody>
</table>

For further information about the Performance Review and Development Program, please refer to the PRDP Policy, PRDP Procedure and PRDP Resources links located on the start page of your review.

You will receive a system generated email advising that your Performance Review and Development Program (PRDP) has been commenced for this PRDP cycle.
Login

Access your PRDP using the link provided in the e-mail and use your University user name and password to login. The URL is http://federationuni.pageuppeople.com.

NOTE: The Performance Review and Development Program (PRDP) is between you and your PRDP Supervisor. If you require any assistance please contact Human Resources.

Please note that Human Resources System Administrators will be able to access all information in the online system. This will only be accessed if and when assistance is requested.
Step 1: Employee drafts objectives

Employee drafts performance objectives in the Performance Plan and development objectives in the Professional Development Plan.

| Stage 1: Performance and Professional Development Planning | Employee drafts objectives |
| October – February | PRDP Supervisor confirms objectives with employee |
| | Employee signs off on objectives |

My Performance Reviews

- You will be presented with the My performance reviews page.

- This page will display your current review and the step you are in.
- From here you are able to search for any current or complete reviews by selecting from the Status drop down list and clicking Search.

- From the I want to select list you are able to select from Open review, View report and View the review process.
Open Review

- Click on the Open review link on the right of the screen.

**NOTE:** This link will only display if there is an activity awaiting your action. If your review is currently sitting with your PRDP Supervisor the open review link will not be displayed.

Navigation Bar

- To progress to the next step of your review click Next in the bottom right corner on each page.
- You can click on page title in the navigation bar to go to any page in the review.
- Clicking the page title or the Next or Back button will automatically save your page.

Start

- You will be presented with some initial information about what the current step - 'Employee drafts objectives' involves. Make sure you read through the information.
Performance Plan

- You are required to draft between three to five performance objectives with performance indicators for each objective using the Performance Plan.

Add Objective

- To add an objective click **Add Objectives**.
- Each objective should clearly specify what needs to be achieved.
- Use the **Tasks and Performance Indicators** field to describe the tasks you need to undertake to achieve the objectives and define how the objective will be measured.
- The target date will automatically populate with your PRDP end date. To change the date, click on the **Target date** and use the Calendar to select a new date.
- You are also able to attach a document to each objective if additional information is required.
- If you edit, add or delete information it will be autosaved. You can see a record of any changes by clicking the **History** link in the top right hand corner of the page.
- The **Status** select list should be set to **Current**. During the monitoring or assessment steps you can change each objective to either **Completed** or **No longer achievable**.

- To add more objectives click **Add Objectives**.
- Click **Next** in the bottom right hand corner to continue or click the next page title – ‘Professional Development Plan’ in the top navigation bar.

**ACTIONS FOR YOU:**

During the ‘Employee drafts objectives’ step:

- You are required to draft between three to five performance objectives with performance indicators using the Performance Plan.
- Then you need to define your professional development, training and industry knowledge/vocational development objectives. It is recommended that you document the strategies (e.g. formal learning, on-the-job training, mentoring, coaching and shadowing) you will implement to achieve your development objectives and resources (e.g. time release and budget approval) you require.
- Your PRDP Supervisor will arrange a time to meet with you to discuss your performance and development objectives.
TIP: For further information refer to the PRDP Policy, PRDP Procedure and PRDP Resources buttons on the Start page.

Professional Development Plan

- During the planning step, you are required to draft your professional development/training and industry knowledge/vocational development objectives in the relevant sections.
- These can be amended during the monitoring step.
- Click Next in the bottom right hand corner to continue, or click the ‘Next Steps’ tab in the top navigation bar.

**ACTIONS FOR YOU:**

- Enter your professional development/training objectives and industry knowledge/vocational development objectives.
Next Steps

- The final page displays a summary of your Performance Plan objectives for this PRDP cycle.
- Click on the **Go to next step** button to complete this step and send your review to your PRDP Supervisor to complete the next step in the PRDP cycle – ‘PRDP Supervisor confirms objectives with employee’.

- An email will be sent to your PRDP Supervisor advising that you have drafted your PRDP objectives for the current PRDP cycle.

**ACTIONS FOR YOU:**

- Review your PRDP Objectives summary
- Click **Go to next step** to move to the next step in the PRDP cycle – ‘PRDP Supervisor confirms objectives with employee’.
Step 2: PRDP Supervisor confirms objectives with employee

PRDP Supervisor reviews and amends performance and development objectives for employee. PRDP Supervisor meets with the employee to confirm and reach agreement on the objectives.

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<th>Stage 1: Performance and Professional Development Planning October – February</th>
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<td>PRDP Supervisor confirms objectives with employee</td>
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**STEP SUMMARY:**

- During the ‘PRDP Supervisor confirms objectives with employee’ step your review is accessible only by your PRDP Supervisor.
- Your PRDP Supervisor may amend any of your objectives, including tasks, performance indicators, strategies and resources, and add objectives. A history of any changes made to your PRDP can be viewed by clicking the **History** link in the top right hand corner of your review.
- Your PRDP Supervisor will meet with you to confirm and reach agreement on your performance and development objectives. Thereafter, an email will be sent to you to sign off on the agreed objectives.

**ACTIONS FOR YOU:**

- You are **not** required to access your PRDP during the ‘PRDP Supervisor confirms objectives with employee’ step.
Step 3: Employee signs off on objectives

Employee signs off on the agreed performance and development objectives.

**Stage 1:**
Performance and Professional Development Planning
October – February

<table>
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**STEP SUMMARY:**
- During this step you confirm that you have met with your PRDP Supervisor and reached agreement on your objectives.
- Review and confirm your objectives as agreed with your PRDP Supervisor.
- A history of any changes made to your PRDP can be viewed by clicking the **History** link in the top right hand corner of your review.
- Click **Next** in the bottom right hand corner to continue or click the next page title in the top navigation bar to review each page.

**Next steps**
- After you have reviewed your PRDP for this cycle proceed to the final page.
- The final page displays a summary of your Performance Plan objectives for this PRDP cycle.
- Click on the **Go to next step** button to confirm you have met with your PRDP Supervisor and reached agreement on the objectives.
- This will move your PRDP to the next step in the cycle – ‘Monitoring Objectives’.

**ACTIONS FOR YOU:**
- Review each of your objectives for this PRDP cycle.
- Click **Go to next step** to move to the next step in the PRDP cycle – ‘Monitoring Objectives’.
- An email will be sent to your PRDP Supervisor advising that you have agreed on your objectives for this PRDP cycle.
Step 4: Monitoring Objectives

The employee and/or PRDP Supervisor can enter comments and link journal entries as and when required. PRDP Supervisor and employee are required to meet formally at least once during this step to monitor the employee’s progress, provide and/or receive feedback, review objectives and identify any issues that may impact the currency of objectives.

Stage 2:
Monitoring Objectives
March – September

STEP SUMMARY:

- The review will remain in the ‘Monitoring objectives’ step until the end of September.
- You are required to formally meet at least once with your PRDP Supervisor to monitor your progress, provide any feedback, review your objectives and identify any issues that may impact your objectives.
- You may use the journaling functionality to record information about your performance and professional development.
- You may also add review comments directly into your Performance Plan and Professional Development Plan.

Using your Journal

There are two ways to add a journal entry to your PRDP – by direct data entry on the Journal page in the PRDP system or by sending an email to your Journal.

Adding a Journal entry directly into the PRDP System

- Access the PRDP System.
- From Useful actions in the menu on the right hand side of the screen, click Journal.

NOTE: You can also access your Journal by hovering your mouse over About me in the top left hand corner of the screen and selecting Journal from the drop down list.
• To add a new journal entry, click **Add entry**.
• You will be presented with a blank text box where you can record your journal entry.
• You can create tags to help categorise your journal entries by typing the ‘#’ symbol before any word in a journal entry. This word then becomes a ‘tag’ word.
• Tags will allow you to search all entries that you have made for a particular ‘tag’. This will make your journal entries easier to find and reference.
• When you have included enough information and/or tagged your entry appropriately, click **Save**.

**TIP:** Categorise your journal entries based on the objective that they relate to.

• As you create new tags, they will appear along the line headed ‘Tags’ on your **My journal** page.
• Click on a tag to view all entries linked to the tag.
• Category tags with a higher usage will appear larger than those with a low usage.

**Adding a Journal entry by email**

You can record new entries in your journal directly from your email inbox.

• On the **My journal** page, you will see a yellow banner containing an email address. This is your unique personal journal address.
• Copy this address and save it in your email contact list.
• When you have an email that you would like to send to your journal, add one of the following tags, including the [ ], to the **subject line OR body of the email**:

  - [Journal]
  - [JNL]
  - [Dear diary]

**TIP:** Remember to incorporate objective category tags in your email so you can search for your journal entry in the future. To do so, simply insert the ‘#’ symbol before the relevant word, e.g. #service.

• When you have finished tagging the email, click **Send**.
• By clicking **Send**, you will be posting the email to your journal and recording it as a new entry in your Journal.

![Email example](image)

**Open Review – During Monitoring Objectives**

You can open your review as often as required while you are in the ‘Monitoring objectives’ step of the PRDP process.

• On the **My Performance review** page you will see your current performance reviews.
• Click on the **Open review** link.
• You will be presented with some initial information about what the current step – ‘Monitoring objectives’ – involves.
• Click **Next** to proceed.
Adding Comments and Linking Journal Entries

- You are encouraged to add comments and link journal entries to each objective. These may assist you when conducting your final review.
- Your PRDP Supervisor will be able to see any comments or linked journal entries.

NOTE: Your Journal entries are generally only visible to you, unless an issue occurs with your journal and a HR System administrator is required to assist you. Linked Journal entries will be visible to your PRDP Supervisor.

- To add a comment, click in the Your comments text box.
- Your comments will be saved automatically.

![Image of objective with comments and journal entry link]

- To add a journal entry, click the Link a journal entry link.
- The My journal page will open in a new window.
- Find the journal entry you wish to add to your PRDP and click the Add journal entry link.
- Your journal entry will appear in Your comments.

TIP: When you link your journal entry your PRDP Supervisor will be able to see them. If required, edit your journal entry in your Journal before linking it to your PRDP.

During the ‘Monitoring objectives’ step you are also encouraged to update the status of an objective to ‘Completed’ or ‘No longer achievable’ as applicable. To do this click Edit in the top right hand corner of the performance plan page then in the drop-down box marked ‘Status’ select the appropriate option. To continue click Rate in the top right hand corner.
Add Professional Development Plan Comments

- Use the comments box to record any comments about your professional development/training objectives or industry knowledge/vocational development objectives.

Next Steps

- At the end of the ‘Monitoring objectives’ step, your PRDP will automatically move into the next step in the PRDP cycle - ‘Employee conducts a self-assessment’.
- You will be sent an email advising that your PRDP has been moved into the next step.

ACTIONS FOR YOU:

- Make comments and link journal entries to your Performance Plan objectives.
- Make comments in your Professional Development Plan.
Step 5: Employee conducts a self-assessment

Employee conducts a self-assessment reflecting on achievements and any mitigating circumstances that may have impacted on performance and professional development.

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<tr>
<td>PRDP Supervisor conducts an assessment</td>
</tr>
<tr>
<td>Employee signs off on final review</td>
</tr>
<tr>
<td>Completed</td>
</tr>
</tbody>
</table>

Open Review

- Click on the Open review link on the right of the screen.
- You will be presented with some initial information about what the current step – ‘Employee conducts a self-assessment’ involves. Make sure you read through this information.
- During this step your PRDP Supervisor is unable to open your PRDP.
- Click Next when you are ready to proceed.

Adding your comments to your Self-Assessment

- Review your performance and development against the objectives agreed at the start of the PRDP cycle.
- Review comments and linked journal entries and use these to describe your achievement of your PRDP objectives in the Your comments text box.
- To move the status of an objective to ‘Complete’ or ‘No longer achievable’ click Edit in the top right hand corner of the performance plan page. To continue click Rate in the top right hand corner.
- Your comments will be saved automatically.
• To add a journal entry, click the **Link a journal entry** link.
• The **My journal** page will open in a new window.
• Find the journal entry you wish to add to your PRDP and click the **Add journal entry** link.
• Your journal entry will appear in **Your comments**.

TIP: When you link your journal entry your PRDP Supervisor will be able to see it. If required, edit your journal entry in your journal before linking it to your PRDP.

• When you have finished making your comments and linking journal entries for each objective, click **Next** in the bottom right hand corner of the screen.

**ACTIONS FOR YOU:**
• Comment on your achievement of your performance and development objectives and link journal entries.
• Meet with your PRDP Supervisor to review your achievement of your performance and development objectives.
Next Steps

- The final page displays a summary of your Performance Plan objectives for this PRDP cycle.
- You are also able to add Final comments to your PRDP (this is optional). Your comments are visible to your PRDP Supervisor.
- To add a final comment about your self-assessment click in the text box and then type your note. Your final comments will be saved automatically.

ACTIONS FOR YOU:

- Make any Final comments – this is optional.
- Click on the Go to next step button to complete this step and send your review to your PRDP Supervisor to complete the next step in the PRDP cycle – ‘PRDP Supervisor conducts an assessment’.

Note:

- An email will be sent to your PRDP Supervisor advising that you have completed your self-assessment.
- Your PRDP Supervisor will arrange to meet with you to provide feedback on your achievement or non-achievement of objectives during the PRDP cycle.
Step 6: PRDP Supervisor conducts an assessment

PRDP Supervisor conducts an assessment of the employee's performance and professional development. PRDP Supervisor meets with employee to provide feedback on the employee's achievement or non-achievement of objectives during the PRDP cycle.

| Stage 3: Performance and Professional Development Review October – December |
|-----------------------------|-----------------------------|
| Employee conducts self-assessment |
| PRDP Supervisor conducts an assessment |
| Employee signs off on final review |
| Completed |

STEP SUMMARY:

- Your PRDP Supervisor will meet with you to provide feedback on your achievement or non-achievement of objectives during the PRDP cycle.
- During this step you are unable to access your PRDP.
- You will have access once your PRDP Supervisor has completed the final review of your performance and professional development for this PRDP cycle.

ACTIONS FOR YOU:

- You are not required to access your PRDP during the ‘PRDP Supervisor conducts an assessment’ step.
## Step 7: Employee signs off on final review

Employee signs off on the final review of the PRDP cycle.

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</table>

### Open Review

- Your PRDP Supervisor has completed your final review and should have provided you with feedback. You are now required to sign off on your final review.
- Click on the **Open review** link on the right of the screen.
- During this step you are unable to make any comments or make any changes to your performance plan objectives.
- Click **Next** when you are ready to proceed.

### Performance Plan

- Review final comments.
- Click **Next** to proceed.

### Professional Development Plan

- Review final comments.
- Click **Next** to proceed.

### ACTIONS FOR YOU:

- Review final comments.
Next Steps

- The final page displays a summary of your Performance Plan objectives for this PRDP cycle.
- You may also add a final comment by clicking in the text box and typing your note. Your final comments will be saved automatically (this is optional).
- Click on the Go to next step button to sign off on the final review of your performance and development for this PRDP cycle.

Your review will be moved into the ‘Completed’ step.
Once completed, you will not be able to open the review. You will only be able to view your PRDP through ‘View Report’.

ACTIONS FOR YOU:
- Add final comments if required.
- Click Go to next step to move your review to the next step in the PRDP cycle – ‘Completed’.
Completed
Your PRDP has been completed for this cycle and you can view your report.

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View your PRDP Report
- On the My performance reviews page you will see a list of your current performance reviews.
- You are able to search for any current or complete performance reviews by selecting from the Status drop down list.
- Select Complete.

- Click Search.

To view the report on your PRDP, select View the report from the I want to drop down list for your review.
- Your report will display in a new window.
- To print a copy of your PRDP report, click the Printer icon in the top right hand corner.
Employee Profile

All employees have their own employee profile within the PRDP system. It is viewed by the employee, PRDP Supervisors, Managers and Human Resources.

You are responsible for updating and maintaining the following areas of your profile:

- Personal photo (a professional headshot)
- Highest level of education
- Field of education
- Place of study
- Teaching qualifications
- Licences held
- Professional memberships
- Position description
- Annual Work plan (VET Teachers only)
- OHS responsibilities at FedUni

Please note: The position details information is automatically provided via the Payroll system. If this information is not correct please contact Payroll.

**ACTIONS FOR YOU:**

- Click on Edit Picture to upload your photo from your desktop or drives (this is optional).
- Hover over the headings within the page, for those that are editable an edit button will appear.
- Make amendments and click the save or cancel button. Refer to the example provided of what displays in Edit mode:
Where to get more information

Refer to the Performance Review and Development Program section on the Human Resources web page for additional information and resources.