



# Staff Services Online – Planning, Development and Review Recording

## Introduction

Planning, Development and Review (PDR) is a basic requirement of employment arrangements at the University.

PDR discussions between staff members and supervisors are integral in ensuring all staff are clear about their performance objectives and their linkage to the unit, operational and strategic goals and objectives of the University.

Once these conversations have taken place, staff members are required to submit the Planning Stage (Objective Setting) and Final Review stages of their PDR Conversation Record through Staff Services Online (SSO).

The data is able to be collected by Human Resources and provided to the Executive Deans / Directors of each area for monitoring.

## Procedure

### Staff member – Submitting your completed PDR

You can access the 'PDR' section in the homepage of Employee Staff Services Online (SSO).



Staff members can **submit** their PDR Conversation Record in all stages: Planning Stage (Objective Setting), Mid Term Review and Final Review. The next stage will automatically appear in your SSO > PDR screen. You are able to adjust **the date** to reflect the meeting date and either **attach** your PDR Conversation Record or store this locally and simply “**submit**”. If you have changed supervisors since your last PDR you will need to manually update this field using **the Staff ID** or the search function. You could save the process and come back later. There are **instructions** on the page to assist each time.

For detailed information about timeline of PDR conversation and deadline of PDR Conversation Record submitting, please refer to [PDR webpage](#) - PDR Cycle.

**Instructions**  
This page enables you to confirm that you have completed the PDR Planning Stage and Final Review with your supervisor **after** you and your supervisor have met to discuss and record.

**Note**  
The **Save for Later** button allows you to edit your proposed PDR record at a later time.  
The **Submit** button forwards your PDR to your supervisor for approval.  
Recording of the **Mid-Term Review** in SSO is optional. Please discuss with your supervisor.

**Corrections to Submitted PDR information**  
If you notice errors after submitting and exiting your PDR page, please contact the HR Service Centre to have the PDR stage reset.

**Your PDR Record**

Year	Empl Record	Supervisor ID	Name	PDR Date	PDR Stage	Attach	View Attachment	Status	Completion Date	Submit
1	2015	0 1022116		11/09/2015	Planning Stage	Attach		Pending		Submit
2	2016	0 1002880		01/03/2016	Planning Stage			Completed	04/03/2016	Submit
3	2016	0 1002880		04/03/2016	Mid Term Review			Completed	01/08/2016	Submit
4	2016	0 1002880		01/09/2016	Final Review			Completed	06/02/2017	Submit
5	2017	0 1022116		20/03/2017	Planning Stage			Completed	27/03/2017	Submit
6	2017	0 1022116		27/03/2017	Mid Term Review			Completed	22/08/2017	Submit
7	2017	0 1022116		27/09/2017	Final Review			Completed	18/12/2017	Submit
8	2018	0 1022116		18/12/2017	Planning Stage	Attach		Pending		Submit

Please contact the HR Service Centre on 8313 1111 for information.

Save for Later

After submitting, this is sent to the staff member’s supervisor for approval where they will be able to confirm the PDR record and view the **attachment**.

### Supervisor – Confirming PDR Submission

When a staff member submits their PDR a link will be sent to you by notification email for confirmation. Alternatively you can access the “**PDR Approval**” through the Manager SSO homepage:

Manager SSO

- My Team
- eForm Approval
- Absence Management
- Timesheet Management
- PDR Approval**
- Learning and Development
- Payment Management
- Help

To approve your staff member’s PDR, select the record and click “**confirm**”. You are able to view the **attached document** before approving the PDR Conversation Record and can access the document again once it is approved. There are instructions on the page to assist each time.

Supervisors with a large number of direct reports are able to filter their staff in “**Filter Results**” area. Only staff who have submitted a PDR record will appear i.e. it will not provide a prompt for those who are still yet to submit a particular stage.

Supervisors are able to confirm all of their staff at once if preferred by clicking “**Select All**” and “**Confirm All**” once they are happy that all PDR’s have been completed.

**Employee SSO** Planning, Development and Review (PDR)

Supervisor's Record: [Redacted]

**Instructions**

Use this page to document the completion of the *PDR Planning Stage*, *PDR Mid Term Review* and the *PDR Final Review* for each of your staff members **after** you have met with them to discuss, and they have submitted a confirmation request (displayed as *Submitted* in the table below).

**Steps for completion:**

- Once each staff member has submitted their record of completion for the *Planning Stage*, *Mid Term Review* or *Final Review* of the PDR process, you will receive notification by email and their name and the details of their submission will appear in the list below. This list represents only those staff members in your workgroup who have submitted information on their PDR progress.
- Staff members may have attached a copy of their *Individual Plan* for PDR for you to review.
- If you have completed the *Planning*, *Mid Term Review* or *Final Review* discussion with your staff member (and reviewed their *Individual Plan* if applicable), then please select the tick box for that person below, and click **confirm** to acknowledge that this stage is complete. Entries on the list will show as 'Submitted' until you have clicked confirm. (Note: the page will not close automatically. Once you have pressed confirm, log out of SSO.)

**PDR - Supervisor's Record**

The **Filter Results** can be used to filter by PDR stage or status. To search for an employee by name use the search icon in the 'Name' field.

**Filter Results**

Name: [Search Icon] PDR Stage: [Dropdown] Filter

Status: [Dropdown] Year: [Text]

	Year	Empl ID	Empl Record	Display Name	PDR Date	PDR Stage	View Attachment	Status	Date Signed	Confirm	
1	<input type="checkbox"/>	2017	1199648	4	[Redacted]	01/05/2017	Mid Term Review		Completed	27/07/2017	Confirm
2	<input type="checkbox"/>	2017	1199648	2	[Redacted]	02/03/2017	Planning Stage		Completed	01/05/2017	Confirm
3	<input type="checkbox"/>	2017	1199648	4	[Redacted]	02/03/2017	Planning Stage		Completed	01/05/2017	Confirm
4	<input type="checkbox"/>	2017	1199648	2	[Redacted]	01/05/2017	Mid Term Review		Completed	27/07/2017	Confirm
5	<input type="checkbox"/>	2017	1199648	4	[Redacted]	27/07/2017	Final Review		Completed	08/01/2018	Confirm

Select All Unselect All Confirm All Selected

To submit your own PDR Conversation Record you will need to switch to **Employee SSO** and refer to the instructions for Staff.

If there is a change in Supervisor at any time the previous Supervisor will still have access to the PDR completion records and attachments that they have confirmed. The new Supervisor will receive the next submission of a PDR record providing that the staff member manually updates the PDR record (refer to the Staff Member instructions above).

## Further Information

If you require further information please contact the HR Service Centre at 8313 1111, complete the [online enquiry form](#) or email [Learning and Development](#).