

PDR Online System

Guidance for Non Academic Staff



This short step-by-step guide to completing PDRs on the online system is for members of staff in Administrative, Management & Specialist, Operational and Technical job families.

System Login



Loughborough University Login

Enter your username and password

A service has requested you to authenticate yourself. Please enter your username and password in the form below.



Username

Password

Login

**Login to the system using
your university
username and password**

Help! I don't remember my password.

Without your username and password you cannot authenticate yourself for access to the service. Please contact the [IT Service Desk](#) for assistance.

System Assistance



My Review



Probationers

Any problems or questions regarding the PDR online system can be submitted using the 'help' function



Help

PDR Help

I'm having a problem with...

- choose an option --
- my Outputs data
- my SciVal data
- my Research Staff managed
- my funding held
- my funding applications
- my Enterprise funding
- my my.HR learning record
- a technical issue with the Review

Close Send

Select the relevant option from the dropdown and type your message in the box below

Preparation Section - Reviewee

Homepage



My Review

Ensure you
are on the My
PDR tab



Help

Click
here to
view the
PDR
online
form for
2018

Team Manager

Operational Services (Monthly)

FTE

Grade

Line Manager

Where applicable, multiple
roles will appear below

2018

(Current Status: Shared Prep with Reviewer)

2017

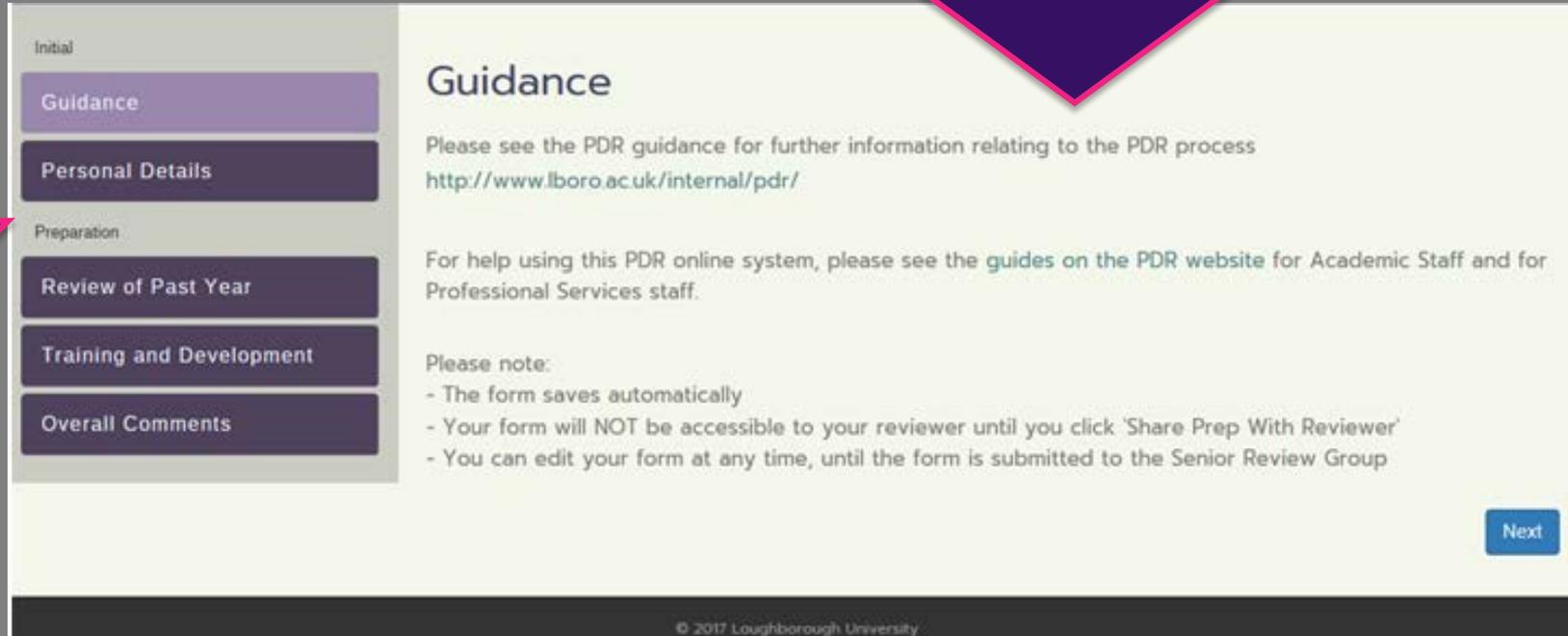
(Current Status: Review Signed Off)



Guidance

Work your way through each page to prepare for your PDR

Carefully read through the guidance notes, following the links to the PDR website for further information



The screenshot shows a web interface for a PDR (Performance Development Review) system. On the left is a sidebar with a grey background, divided into two sections: 'Initial' and 'Preparation'. Under 'Initial', there are four buttons: 'Guidance' (highlighted in purple), 'Personal Details', 'Review of Past Year', and 'Training and Development'. Under 'Preparation', there is one button: 'Overall Comments'. The main content area has a white background and is titled 'Guidance'. It contains the following text: 'Please see the PDR guidance for further information relating to the PDR process <http://www.lboro.ac.uk/internal/pdr/>'. Below this, it says 'For help using this PDR online system, please see the [guides](#) on the PDR website for Academic Staff and for Professional Services staff.' A 'Please note:' section follows, with three bullet points: '- The form saves automatically', '- Your form will NOT be accessible to your reviewer until you click 'Share Prep With Reviewer'', and '- You can edit your form at any time, until the form is submitted to the Senior Review Group'. At the bottom right of the main content area, there is a blue button labeled 'Next'. At the very bottom of the page, there is a footer: '© 2017 Loughborough University'.

Initial

- Guidance
- Personal Details

Preparation

- Review of Past Year
- Training and Development
- Overall Comments

Guidance

Please see the PDR guidance for further information relating to the PDR process <http://www.lboro.ac.uk/internal/pdr/>

For help using this PDR online system, please see the [guides](#) on the PDR website for Academic Staff and for Professional Services staff.

Please note:

- The form saves automatically
- Your form will NOT be accessible to your reviewer until you click 'Share Prep With Reviewer'
- You can edit your form at any time, until the form is submitted to the Senior Review Group

Next

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Personal Details

Initial

Guidance

Personal Details

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Overall Comments

Personal Details

This section is information about your role that is taken from iTrent. If any of this information is incorrect then please discuss it with your line manager, who should then contact HR to ask for updates to be made. Any changes made will take 24 hours to refresh.

Name
School/Department
Position
FTE
Grade
Date Role Started
Last Review Date
Reviewer
Line Manager

Check your personal details.

Incorrect details should be reported to your line manager who will contact HR.

Back Next

Review of Past Year

Guidance

Personal Details

Preparation

Review of Past Year

Training and Development

Overall Comments

Review of Past Year

This section gives you the opportunity to review your PDR Performance and Development objectives over the last 12 months.

Agreed Performance Objectives

Agreed Development Objectives

Comment

Use this space to record your achievements, progress for this year. Include any changes to your original objectives agreed throughout the year. Remember to highlight any particular successes or challenges you faced in meeting your objectives.

Please note for this year only, if no objectives are shown above then in addition to reflecting on your performance you will need to copy and paste your Performance and Development objectives into the box below, commenting on how well you have met them.

Review of Past Year

Your 2017/18 objectives will appear here (unless you were exempt from PDR or have changed roles in the last 12 months)

This space should be used to comment on your progress towards each objective.

OR (for those whose objectives do not appear above):

- Copy and paste last year's performance and development objectives into this box
- Review your progress against each objective; highlighting your successes and challenges

Training and Development

Guidance

Personal Details

Preparation

Review of Past Year

Training and Development

Overall Comments

Training and Development

This section lists all of the training and development undertaken as recorded in my.HR.

Date	Title	Topic
24/10/2016		
15/08/2016		
26/04/2016		
19/04/2016		
18/04/2016		
12/04/2016		
04/04/2016		

Your learning record from my.HR will be listed here in date order

Additional Learning and Development

If you have undertaken any development activities not listed above then please include these in the space below. You can also add additional training into my.HR to ensure your personal learning record is accurate. This will update every 24 hours.

Additional Learning and Development

Format **B** *I*

This box can be used for any development which is not listed above

Overall Comments

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Overall Comments

Overall Comments

This is an opportunity to add any additional information that you feel is relevant to your performance and/or development. This information may be useful in reviewing your past objectives or thinking about your future objectives.

Comment

Comment

Format ▼ **B** *I* ☰ ☷ ↻

Use this space to provide your Reviewer with any additional details regarding your performance and development over the last 12 months

Overall Comments (Continued)

Proposed Objectives

Please use this space to suggest what objectives you might try to achieve next year. Future objectives will need to be agreed with your reviewer in both performance and development so it is helpful to give this consideration prior to your PDR.

Proposed Objectives

Format ▼	B	<i>I</i>	☰ ☷	↻
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Use this space to suggest potential performance and development objectives for the next 12 months

Overall Comments (Continued)

Line Manager Feedback

If you have any feedback for your line manager please enter it below.

Format ▼ **B** *I* ☰ ☷ ↻

This space can be used to provide feedback for your line manager

When you are satisfied you have completed your preparation work, click this button to share with your Reviewer. This will trigger an email to notify them.

Share Prep With Reviewer

Meeting Record Section – Reviewer

Reviewers only



My Review



My Reviewees

Name	Job Title	Progress	Rating	Meeting Date	Last Updated	Rating Agreed	Actions
		Shared Meeting with Reviewee	(show)	-	8 th Dec 2017 at 09:58	-	Open review

Check that
your
Reviewee
has
completed
their
preparation
here

Select 'open
2018
review'
from the
drop down
to view the
Reviewee's
preparation

Setting Objectives (Performance)

Reviewers only

Guidance

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Overall Comments

Meeting Record

Setting Objectives

Reviewer's Comments

Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

Agreed Performance Objectives

Category

Objective Title

Action by when

Comment

Details of the objective are recorded here

Use this space to input the specific details of the agreed objective. This may include any resources needed and how performance will be measured.

Use this button to add more objectives

Add Another

Setting Objectives (Development)

Reviewers only

Agreed Development Objectives

Category	<input type="text"/>
Objective Title	<input type="text"/>
Type	<ul style="list-style-type: none">CoachingConferenceCustomer ServiceHealth and SafetyIT/DigitalJob ShadowLeadership/ManagementMandatory TrainingMentoringPersonal DevelopmentPolicy and Procedure
Where	<input type="text"/>
Action by when	<input type="text"/>
Comment	<input type="text"/>

Details of the objective are recorded here

Use this space to input the specific details of the agreed objective. This may include any resources needed and how success will be measured.

Reviewer's Comments

Reviewers only

Initial

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Reviewer's Comments

Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

Discussion Summary

Format

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Use this space to summarise the PDR meeting, including the rationale behind the recommended performance assessment rating.

PDR Meeting Date

Please enter the date on which the PDR discussion took place.

Use the calendar to input the date of the meeting



Reviewer's Comments

Reviewers only

Select
recommended
rating from
drop down
menu

Recommended Performance Rating

Recommend exceeds expectations
Recommend meets expectations
Recommend does not meet expectations
N/A - started position since 1st October

Please enter at least one development and performance objective, meeting notes, meeting date and a rating (and supporting statement if recommending exceeds expectations) before sharing.

Share Meeting Record with Reviewee

Check through the objectives, discussion summary and recommended performance rating then click this button to share with your reviewee. This will trigger an email to notify them.

Supporting Statement

Reviewers only

If you recommend a rating of 'exceeds expectations' the supporting statement box below will appear automatically

Recommended Performance Rating

Recommend exceeds expectations

Supporting Statement

Use this space to identify the evidence from the PDR discussion that demonstrates how, over the previous 12 months, the Reviewee has exceeded expectations. (100 words maximum)

Format ▼ **B** *I* U (inherited size) ▼ [List icons] [Link icon]

Use this space to justify your recommended rating of 'exceeds expectations' to the Senior Reviewer Group (within 100 words), then 'share meeting record with Reviewee'

PDR Agreement - Reviewee

Reviewer's Comments

Reviewees only

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PDR Agreement

Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

Agreed Performance Objectives

Category

Title

Action by when

Comment

Thoroughly read through the agreed performance and development objectives inputted by your Reviewer.

If you feel any need amending you will need to discuss this with your Reviewer. They will need to login to make the changes.

Agreed Development Objectives

Category

[Nothing entered]

Title

[Nothing entered]

Reviewer's Comments

Reviewees only

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Reviewer's Comments

PDR Agreement

Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

[Nothing entered]

PDR Meeting Date

Please enter the date on which the PDR discussion took place.

05/01/2018



Recommended Performance Rating

Your recommended rating will appear here

Check that your Reviewer's discussion summary and PDR meeting date are correct

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PDR Agreement

Reviewees only

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PDR Agreement

PDR Agreement

Please complete this section before submitting the PDR form to be reviewed by the Senior Review Group. You are able to continue to edit the form at any point until you click "Submit".

Reviewee

Please use the space provided to make any comments you have regarding your recommended performance rating.

Format



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I



This space can be used if you wish to make any comments in terms of your recommended performance assessment rating

PDR Agreement

Reviewees only

I agree with the recommended rating

If you agree with your rating please select "agree" from the dropdown box below. If you do not agree please use the comments box to state the reasons why you are in disagreement with your recommended rating and select "disagree" from the dropdown.



I agree with my rating
I disagree with my rating

Back

Submit PDR (reviewee)

Use the
drop
down to
select
'agree' or
'disagree'

Please Note!
Once submitted to the
Senior Reviewer Group
no further amendments
can be made.

Click
here to
submit
to the
Senior
Reviewer
Group

PDR Agreement - Reviewer

PDR Agreement

Reviewers only

Once the reviewee has submitted their PDR again you must submit it to the Senior Review Group. You will be offered the opportunity to add any further comments.

Reviewee Name	Reviewee Position	Reviewee Submitted	Actions
			Actions

Reviewees at this stage will appear with this in the progress column.

Click here to open up the review.

PDR Agreement

Reviewers only

Setting Objectives

Reviewer's Comments

PDR Agreement

I agree with the recommended rating

If you agree with your rating please select "agree" from the dropdown box below. If you do not agree please use the comments box to state the reasons why you are in disagreement with your recommended rating and select "disagree" from the dropdown.

Reviewer

Please add any final comments that you feel would be helpful in summarising the discussion that took place during the PDR meeting, or the reasons for the performance rating given.

Format (inherited size)

Back Submit PDR (reviewer)

Agreement or disagreement with the rating will appear here

You are given the opportunity to add any further comments in this box.

Click here to submit to the Senior Reviewer Group. This is the final step

Take your performance
and development
to a new level



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University

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