PERFORMANCE AND DEVELOPMENT REVIEW - PROFESSIONAL STAFF - USER GUIDE
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Performance and Development Review

ANU provides a performance and development framework which supports academic and professional staff to reach their potential across the broad spectrum of activities in which they are involved. Career development @ ANU incorporates a suite of online resources designed to facilitate and recognise the achievements of our most important resource, our staff.

A critical element of any performance and development framework is the meaningful, two-way engagement between a staff member and their supervisor. The Performance and Development Review (PDR) is designed to support these ongoing discussions.

The Performance and Development Review form is to be used to document the performance plan, key objectives for the period, and assessments carried out at mid and end of term.

Form Link
Performance and Development Review

Relevant Policy
A review of the existing Performance Review framework has resulted in the University replacing the biennial Statement of Expectation (SoE) with the annual Performance and Development Review (PDR).

Updated policy for Professional Staff can be found here.

Supporting Materials
The Career and Development website has also been updated to provide further information in relation to undertaking the performance review.

Form Rules
The following rules have been automated into the form.

Initiation of the form
Supervisors are required to initiate Supervisors will only be able to see staff that are in their direct line of supervision. If the staff member does not appear in the drop down list, users are advised to contact their Local HR area.

Alternatively, if staff members appear in this list that shouldn’t, Local HR areas will also be able to assist.

System Integrations
Upon completion of each stage of the PDR process, a date will be stored in the HR Management System that will be used to track completion. Dates will be stored at the following:

- Acknowledgement of the PDR Plan by the Staff Member
- Acknowledgement of the Mid-Term Review by the Staff Member
- Acknowledgement of the End of Term Review by the Staff Member
Professional Staff PDR - Start of Term - PDR Plan development

**Supervisor**

- **Start**
- Supervisor to login to e-Form to commence the PDR process
- Select the staff member that the PDR is for
- Select the review term or document probation period
- Supervisor to assign the form to the staff member and provide instructions for completion

**Face to face meeting (supervisor and staff)**

- Receive email with instructions to complete the draft PDR plan
- Review draft plan and print copy in preparation for face to face meeting
- Staff member to document/edit the online PDR following the conversation in relation to Career Development and performance expectations

**Staff Member**

- A probation period duration will need to be completed for the first PDR for a new staff member.
- The review term will be automated once a PDR assessment has been completed using the online form.
- A supervisor will be able to provide instructions to the staff member to complete the PDR.
- The staff member will receive a reminder 3 months prior to their mid term review falling due.

Where further changes are needed to the PDR plan, the Supervisor should discuss with the staff member and then make final changes.

- Staff member acknowledges the Performance & Development Review plan
- PDR plan is sent from the staff member to the supervisor to review/confirm
- End of Term assessment

Legend

- **Process Step**
- **Task**
- **Face to Face Meeting**
- **Approval**
- **Request**
- **Amendments required**
Developing the Performance and Development Review Plan - Professional Staff

This reference guide provides an overview of the process when developing a Performance and Development Review plan.

Planning Stages

- Supervisor initiates performance and development review plan
- Staff member drafts the PDR plan
- Supervisor reviews and finalises PDR plan
- Staff member acknowledges PDR plan
**Supervisor Initiates Performance and Development review plan**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Supervisor to <a href="#">ANU eForms</a> using UID and HORUS password</td>
</tr>
<tr>
<td>2.</td>
<td>Select the Performance and Development Review form</td>
</tr>
</tbody>
</table>

**Introduction**

**PDR Initiation**

Career development @ ANU

ANU provides a performance and development framework which supports academic and professional staff to reach their potential across the broad spectrum of activities in which they are involved. Career development @ ANU incorporates a suite of online resources designed to facilitate and recognise the achievements of our most important resource, our staff.

A critical element of any performance and development framework is the meaningful, two-way engagement between a staff member and their supervisor. The Performance and Development Review (PDR) is designed to support these ongoing discussions.

Performance and Development Review

As a supervisor, you should initiate the Performance and Development Process (PDP) for each member of your team for whom you are the direct supervisor. The PDR captures and records the performance objectives and indicators, as well as development opportunities, agreed between a staff member and their supervisor at the beginning of the review period. At the end of the review period, the PDR records progress and achievements for the overall period, as reviewed by their supervisor relative to opportunity.

Throughout the review period, supervisors and staff should engage in regular discussion around progress and achievement. These discussions are important opportunities for feedback, to discuss any challenges or concerns and identify additional support or guidance to assist.

Additional guidance and support regarding Career Development @ ANU can be found by contacting careersdev@anu.edu.au. Supervisors should ensure they are familiar with the suite of resources available, in particular, the Performance and Development Process – Academic Staff Procedure or Career and Performance Development Process – Professional Staff Procedure.

Instructions for the online PDR

The online PDR provides you with guidance and options for completion. As you step through the online PDR, the applicable workflow will be displayed on the left of the screen, allowing for easy navigation once you are familiar with the content.

Enter the online PDR now by clicking the arrow (→) on the top right of this page. On later pages you can use the back arrow (←) to return to the previous page or the workflow menu to navigate directly to a particular page.

Click on the [next arrow](#) to proceed.
4. Select the staff member that the review is for and select their current role

**Staff member**

Please select the staff member for whom you are initiating the review period in the drop down list.

- Staff member *
- Penny's current role *
5. Check that the details returned for the staff member are correct

**Staff member details**

<table>
<thead>
<tr>
<th>UID</th>
<th>u8888888</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Administrator (Position #1234321)</td>
</tr>
<tr>
<td>Department / School / Centre</td>
<td>College Executive</td>
</tr>
<tr>
<td>Probation Confirmation Date</td>
<td>1/01/2009</td>
</tr>
</tbody>
</table>

Please check this information is correct before proceeding. If an error is identified please contact your local HR team.

If the staff member is on probation, their expected probation date will be displayed.

**Staff member details**

<table>
<thead>
<tr>
<th>UID</th>
<th>u8888888</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Administrator (Position #1234321)</td>
</tr>
<tr>
<td>Department / School / Centre</td>
<td>College Executive</td>
</tr>
<tr>
<td>Expected Probation Date</td>
<td>1/01/2016</td>
</tr>
</tbody>
</table>

Please check this information is correct before proceeding. If an error is identified please contact your local HR team.

If an error is identified, please contact your Local HR area.

Click on the [ ] to proceed.
6. Select the start date for the Performance and Development Review period

PDR Initiation

As the supervisor initiating a PDP review period, please confirm the start date for this review period.

7. Please specify who will draft the performance review.

Please specify who will draft the online PDR.

If you send to your staff member: An email will be sent to the staff member requesting they prepare a draft PDR to support the scheduled PDP discussion. You can write a short message outlining any particular requirements applicable to the initial draft, such as key projects or focus areas.

If you draft the PDR: You will be able to work through the PDR and draft all components. After drafting, an email will be sent to the staff member requesting they review and finalise the draft.

How would you like to proceed?

- [ ] Send to staff member to draft PDR
- [ ] I would like to draft the PDR

If the staff member is to draft, you can provide comments and assign the form to them by clicking the ‘submit for staff member contribution’ button
If, as the supervisor you wish to draft/partially draft the plan, the PDR form sections will appear.

Please follow the instructions in the next section for guidance in relation to completing these pages.

Staff Member drafts the PDR plan

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to ANU eForms using UID and HORUS password

3. The form will appear in the Forms Assigned to Me section

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Staff Member PDR Plan Contribution</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Click on the form to enter

4. The first page is an introduction page that will provide details of the performance and development process and instructions for completing the form. The introduction page will also include a message from your supervisor in relation to drafting the agreement.

   **Message from your Supervisor**

   From Peter Brown:

   Please draft your performance review plan for this period

   Click on the to proceed.
5. As performance review documents are completed in the Intelledox form, completed reviews from the previous year will be available to view and reflect on.

```
Previous PDRs

Staff members can request access to their personal information to review previous PDR’s. Requests to access personal information must be lodged with Director, Human Resources.

For further information and instructions relating to access to personal information please refer to ANUP_000656 Access to personnel files and personal information.

Where a PDR has been generated using the Intelledox form, past records will appear below for your reference.
```

Click on the to proceed.

6. Staff members are required to draft their development actions to be undertaken during the period, and document mid to long term career development plans.
Staff Career Development

In addition to establishing the performance objectives and indicators in a PDR, a career development plan should be created. The initial plan will inform the staff member's career development plan in future PDP review periods.

A career development plan encourages a staff member to think about how their career is progressing, their aspirations, and ways these may be supported over the review period. Areas for consideration may include: talents and strengths; career goals; development opportunities and actions to address these considerations in the context of the current role and agreed career development plan. A career development plan captures the resources and support needed to achieve their career and development goals.

Career development plan for professional staff

Skills and knowledge to be developed, and proposed actions

Detail the skills, knowledge, and development opportunities you believe you need to develop during the review period. List specific actions you and your supervisor will take to assist in achieving the performance objectives.
If you are on probation, the mandatory online courses will be displayed.
Specific development and training activities that you would like considered in this performance review period should be included here. You can add additional training fields by clicking the + button.

Click on the to proceed.

8. Staff members are required to acknowledge their WHS responsibilities. WHS duties statements can be found on the ANU Work Health and Safety webpage and identify additional WHS objective for some roles. Additional WHS objectives can be added by clicking the “I would like to add additional objectives” box.
Work Health and Safety (WHS) Responsibilities

While at work, a staff member must:
- take reasonable care for his or her own health and safety
- take reasonable care that his or her acts or omissions do not adversely affect the health and safety of other persons
- comply, so far as the worker is reasonably able, with any reasonable instruction that is given
- co-operate with any ANU policy or procedure relating to health or safety at the workplace.

☐ I, Penny Smith, acknowledge my WHS responsibilities.

Some staff members may be required to undertake additional WHS duties in line with their position. Please refer to ANU work health & safety duties to determine if there are additional WHS duties for the role.

☐ I would like to add additional WHS objectives

Click on the to proceed.


You can add additional objective and measurable indicators by clicking the + button.

Please note: You are required to list at least one measurable performance indicator for each performance objective identified.
Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

The agreed performance objectives and performance indicators should be entered below. Add an additional row by clicking the + button and remove a row by checking the tick box on the left of the row, and then pressing the - button.

Click on the ➔ to proceed.
10. At this point in the process, the staff member should print a copy of the draft performance review form to be used at their face to face discussion with their supervisor.

The print the form - click on the print icon

Staff members should then save the form and exit. Please note: DO NOT submit the form at this stage - you will be required to edit the form after your discussion with your Supervisor.

<table>
<thead>
<tr>
<th>Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft Performance Plan</td>
</tr>
<tr>
<td>If you have completed the draft of your performance plan, you should use the print function above to access a printable version of this document. This document should then be discussed with your supervisor in your face to face performance planning discussion.</td>
</tr>
<tr>
<td>Please ensure that you then save the form - using the save button above, before exiting the form as you will be required to return to edit this form.</td>
</tr>
<tr>
<td>Please note: If you have not had your face to face discussion, please DO NOT submit this form.</td>
</tr>
</tbody>
</table>

Click on the to save, and exit the form by clicking on ‘Log Out’

11. After your face to face meeting with your supervisor, you should log back into ANU eForms using UID and HORUS password

12. The form will still be in the forms assigned to me section

<table>
<thead>
<tr>
<th>Forms Assigned To Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Staff Member PDR Plan Contribution</td>
</tr>
<tr>
<td>Assigned By: Peter Brown</td>
</tr>
</tbody>
</table>

Click on the form to enter

13. You should edit the draft plan you have prepared with the information discussed at your face to face meeting with your supervisor. You will be able to see and edit all fields.
14. Once you have finalised your draft, you should submit the form to your supervisor for final review.

**Finalising the performance plan**

After your face to face discussion with your supervisor you are required to log back into this form and make any adjustments as discussed with your supervisor.

If you have had your face to face discussion and have made any required amendments, you should submit this form to your supervisor using the submit button below.

Submit form for Supervisor Review and Sign-off

---

**Supervisor reviews and finalises PDR plan**

1. The Supervisor will receive an email notification that form action is required.
2. The Supervisor should login to [ANU eForms](#) using their UID and HORUS password.
3. The form will appear in the Forms Assigned to Me section. Click on the form to enter.

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Supervisor Signoff - PDR Plan</td>
<td>Penny Smith</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. The Supervisor should review and can edit the details in all of the form pages.

   **Introduction**
   
   Plan, Review and Approve - Supervisor
   
   A draft PDR has been submitted by your staff member, Penny Smith for review. You can view and edit all contributions to date. Please carefully review the information in this form as your staff member may have made changes.

   Note: You should discuss any changes with the staff member before submitting the form.
Click on the to proceed.

Staff Career Development

In addition to establishing the performance objectives and indicators in a PDR, a career development plan should be created. The initial plan will inform the staff member’s career development plan in future PDP review periods.

A career development plan encourages a staff member to think about how their career is progressing, their aspirations, and ways these may be supported over the review period. Areas for consideration may include: talents and strengths; career goals; development opportunities and actions to address these considerations in the context of the current role and agreed career development plan. A career development plan captures the resources and support needed to achieve their career and development goals.

Career development plan for professional staff

Skills and knowledge to be developed, and proposed actions

.Detail the skills, knowledge, and development opportunities you believe you need to develop during the review period. List specific actions you and your supervisor will take to assist in achieving the performance objectives.

Skills and knowledge required including:

Skill 1

Knowledge
Mid-range (2-3 years) career development plan

Consider your career aspirations and goals. Document the goals you will need to accomplish to achieve your aspirations.

Objective 1

Objective 2

Long range (4-5 years) career development plan

Objective 1

Objective 2

Click on the to proceed.
## Development and Training Activities

**Relevant training opportunities**

You can access the HORUS training webpage [here](#).

Please list any training opportunities that are specific to the role being undertaken, or are required for the role to comply with legislation. Please note that the training activities listed are subject to agreement and approval from your supervisor.

<table>
<thead>
<tr>
<th>Development and training activities</th>
<th>Complete by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Training</td>
<td></td>
</tr>
</tbody>
</table>

Click on the [ ](#) to proceed.
5. The Supervisor then finalises the plan to be sent to the staff member for acknowledgement.
Final Plan Submission

By clicking the submit button below you confirm that you have met with Penny Smith to discuss any changes made to this PDR Plan.

You will be provided with an email reminder three (3) months prior to Penny Smith's Mid-term and End of term review falling due. You are encouraged to engage frequently with your staff member regarding their progress. It is advisable to address any potential challenges or issues in relation to achievement of the objectives contained within this PDR as soon as they are identified.

Submit to Staff Member for Acknowledgement

Staff Member acknowledges PDR plan

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to ANU eForms using their UID and password.
3. The form will appear in the Forms Assigned to Me section.
   
   **Forms Assigned To Me**

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Staff Member Plan Acknowledgement</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. The staff member will see a read only version of the form and all of the fields that have been completed.
5. At the end of the form the staff member will be asked to acknowledge the performance review plan.

A copy of the finalised document will be sent to the staff member and supervisor, and a copy automatically sent to the Electronic Records Management System.
Professional Staff PDR - Mid-term Review

<table>
<thead>
<tr>
<th>Intelledox</th>
<th>Supervisor</th>
<th>Face to face meeting (supervisor and staff)</th>
<th>Staff Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminder sent to Staff Member &amp; Supervisor</td>
<td></td>
<td>Supervisor receives a reminder that a PDR assessment is due in 3 months</td>
<td>Staff Member receives a reminder that the mid-term review is due in 3 months, and is prompted to complete self assessment</td>
</tr>
<tr>
<td></td>
<td>Supervisor receives a reminder that a PDR assessment is due in 3 months</td>
<td></td>
<td>Staff member to login to eForm and complete self assessment against performance objectives</td>
</tr>
<tr>
<td></td>
<td>Supervisor/staff member to arrange Performance review meeting</td>
<td></td>
<td>Supervisor/staff member to arrange Performance review meeting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Staff member will receive a reminder 3 months prior to their end of term review falling due.</td>
</tr>
<tr>
<td></td>
<td>Supervisor to review Staff Member self assessment and print document for face to face discussion</td>
<td></td>
<td>Supervisor and staff member meet to discuss mid-term review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Staff member will acknowledge review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mid-term review completed</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Supervisor will receive an automated email from Intelledox to remind them that the mid-term review for a staff member is due in 3 months.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This is the prompt for the Supervisor to request that the staff member completes the self assessment and arrange a meeting to discuss the staff members performance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Supervisor will be able to add any additional information and print the PDR mid-term review for the face to face discussion. The Supervisor SHOULD NOT submit the form at this point. They should save their progress as they will need to update the form after their face to face meeting.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The Supervisor will review Staff Member self assessment and print document for face to face discussion</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Supervisor sends form to the staff member for acknowledgment</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Staff member acknowledges review</td>
</tr>
</tbody>
</table>

Legend
- Process Step
- Task
- Face to face meeting
- Approval
- Question
- Request
- Amendments required
Mid-term PDR Review- Professional Staff

This reference guide provides an overview of the process when completing the mid-term PDR review.

Mid-term review stages

- Mid-term Review- Staff Member Self-Assessment
- Mid-term Review- Supervisor Review
- Mid-term Review- Staff member acknowledgement

Mid-term Review- Staff Member Self-Assessment
The staff member will receive a reminder to commence their midterm self-assessment 3 months prior to the midterm review being due.

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to ANU eForms using their UID and password.
3. The form will appear in the Forms Assigned to Me section

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Mid-Term Self Assessment</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the form to enter

4. The staff member will be asked to reflect on their achievements over the period.
Introduction

Mid-Term Review

Your PDR is now ready for mid-term self-assessment. Peter Brown has invited you to reflect and report on your achievements throughout the PDR period.

Following completion of the self-assessment, the PDR will be returned to your supervisor for their review prior to the mid term review meeting.

In the sections which follow you can view (but not edit) your original PDR established at the beginning of the PDP period; and reflect on your progress and achievements over the review period by completing the free text fields throughout the document.

Click on the to proceed.
5. The staff member should reflect on their achievements against the performance objectives and provide comments.

Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

Performance Objectives and Indicators

1. Performance Objective 1
   - Indicator 1
   - Indicator 2

2. Performance Objective 2
   - Indicator 1

Click on the to proceed.
6. The staff member should provide overall comments in relation to the career and development activities undertaken during the period to date.

Click on the submit button to send the mid-term self-assessment to your supervisor.
**Mid-term Review - Supervisor Review**

The supervisor will receive an email to notify them that the staff member has completed their mid-term review self-assessment.

1. The supervisor will receive an email notification that form action is required.
2. The supervisor should log in to [ANU eForms](https://www.anu.edu.au) using their UID and password.
3. The form will appear in the Forms Assigned to Me section.

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Mid-Term Review</td>
<td>Penny Smith</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the form to enter.

4. The supervisor can determine if changes are required to the performance objectives for the remainder of the term.

**Introduction**

**Mid-Term Review**

Throughout the review period, supervisors and staff should engage in regular discussions around progress and achievement. These discussions are important opportunities for feedback and to discuss any challenges or concerns and identify additional support or guidance to assist the staff member in reaching their objectives.

As a supervisor you are now required to complete a mid-term assessment of Penny Smith's career development and performance against key objectives.

You will be able to view the development goals and performance objectives documented in the PDR planning stage and provide comments.

In the case that the PDR needs to be amended due to changes to the performance objectives, you will also be able to edit the document if needed.

**How would you like to proceed?**

- Complete mid-term assessment with no changes to the PDR
- Complete mid-term assessment and amend the PDR
If changes are required, the supervisor will be able to edit the full performance plan and will see those pages appear on the left hand side of the form. These sections can be navigated using that menu, or my clicking the -> to proceed.

If changes are not required, the supervisor will be able to review the staff members comments and provide feedback

Click on the ➔ to proceed.
5. The supervisor should provide comment on the staff member’s achievements against the performance objectives.

### Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

<table>
<thead>
<tr>
<th>Performance Objectives and Indicators</th>
<th>Mid-Term Self Assessment</th>
<th>Supervisor Mid-Term Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Performance Objective 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Indicator 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Indicator 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 - Performance Objective 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Indicator 1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the [ ] to proceed.
6. The supervisor can review the staff member’s comments and provide overall comments in relation to the career and development activities undertaken during the period to date.

<table>
<thead>
<tr>
<th>Staff Member’s Overall Self Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following details the self-assessment undertaken by Penny Smith:</td>
</tr>
<tr>
<td>Overall self assessment Assessment against development needs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supervisor Overall Mid-Term Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please provide general comments on Penny Smith’s progress towards achieving the expectations set in the PDR planning stage:</td>
</tr>
</tbody>
</table>

Click on the to proceed.
7. The supervisor will need to confirm that they have met with the staff member and discussed the mid-term review assessment and feedback.

Mid-Term Review Submission

- I confirm that I have met with Penny Smith to provide the mid-term review assessment and feedback.

An email will be sent to Penny Smith to view and acknowledge the mid-term review assessment and feedback.

You will be provided with an email reminder three (3) months prior to Penny’s End of Term Review falling due. You are encouraged to engage frequently with your staff member regarding their progress, and address early any potential challenges or issues which arise in regard to their achieving the objectives contained with this PDR.

Submit for staff member review and contribution

The supervisor can then submit the mid-term assessment.

Mid-term Review- Staff member acknowledgement

The staff member will receive an email to notify them that the supervisor has completed their mid-term review.

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to ANU eForms using their UID and password.
3. The form will appear in the Forms Assigned to Me section.

Forms Assigned To Me

<table>
<thead>
<tr>
<th>Form</th>
<th>Assigned By</th>
<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - Mid Term Review Staff Member Acknowledgement</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the form to enter

4. The staff member will be able to view a read only version of the assessment made by their supervisor.
Introduction

Mid-Term Review

Throughout the review period, supervisors and staff should engage in regular progress reviews to discuss progress and achievement; these discussions are important opportunities for the exchange of feedback and to discuss any challenges or concerns either party may and identify additional support and/or guidance to assist the staff member in reaching their objectives.

Your supervisor has provided comments and feedback as part of the mid-term review process. This feedback and comments are provided against the career development and performance objectives that were identified in the PDR planning stage.

Please review the feedback provided against your PDR plan by clicking the arrow (→) on the top right of this page; on any subsequent page you can use the back arrow (←) to return to the previous page or the workflow menu to navigate directly to a particular page.

Click on the ➔ to proceed.
5. The supervisors comments can be seen against the performance objectives

Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

Performance Objectives and Indicators

1. Performance Objective 1
   - Indicator 1
   - Indicator 2

2. Performance Objective 2
   - Indicator 1

Mid-Term Self Assessment

Self-assessment comment 1

Supervisor Mid-Term Assessment

Supervisor mid-term comment 1

Click on the to proceed.

6. Overall comments provided by the supervisor will appear on this page.

Overall Assessment

The following are comments provided by in relation to your overall progress towards achieving the expectations set out in the PDR planning stage:

Supervisor mid-term overall comments

Click on the to proceed.
7. On the final page, the staff member can provide any additional comments.

The staff member will need to confirm that they have had a discussion with their Supervisor, and the outcomes of that discussion are documented in the mid-term assessment. The staff member can then submit the assessment.
Professional Staff PDR- End of Term Assessment

<table>
<thead>
<tr>
<th>Intelledox</th>
<th>Supervisor</th>
<th>Face to face meeting (supervisor and staff)</th>
<th>Staff Member</th>
</tr>
</thead>
</table>
| End of Term assessment due in 3 months | The Supervisor receives a reminder that the end of term review is due in 3 months | The Supervisor will receive an automated email from Intelledox to remind them that the end of term review for a staff member is due in 3 months. | Staff Member receives a reminder that the end of term review is due in 3 months, and is prompted to complete self assessment.
| Reminder sent to Staff Member & Supervisor | This is the prompt for the Supervisor to request that the staff member completes the self assessment and arrange a meeting to discuss the staff member's performance. | | Staff member to login to e-Form and complete self assessment against objectives.
| | Supervisor/staff member to arrange Performance review meeting | | Supervisor/staff member to arrange Performance review meeting |
| | Supervisor to review Staff Member self assessment and print document for face to face discussion | | Supervisor/staff member to arrange Performance review meeting |
| | Supervisor sends form to the staff member for acknowledgement | | Staff member acknowledges review |
| | Supervisor to document end of term comments and performance rating | | The Staff Member may choose to provide final comments regarding the PDR |
| | | | The Staff Member will receive a reminder that their new PDR plan is due |
| | | | | |

Legend
- Process Step
- Task
- Face to Face Meeting
- Approval
- Request
- Amendments required
End of Term PDR Assessment- Professional Staff

This reference guide provides an overview of the process completing the End of Term PDR assessment.

End of Term PDR Stages

- End of Term Review- Staff Member self-assessment
- End of Term Review- Supervisor assessment
- End of Term Review- Staff Member review acknowledgement

End of Term Review- Staff Member self-assessment

The staff member will receive an email to notify them that their end of term performance and development review self-assessment is due.

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to ANU eForms using their UID and password.
3. The form will appear in the Forms Assigned to Me section

<table>
<thead>
<tr>
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<th>Date Assigned</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance and Development Review - End of Term Self Assessment</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the form to enter

4. The staff member will be instructed to review the performance and development review.
Introduction

End of Term Review - Self Assessment

Your PDR is now ready for self-assessment. Peter Brown has invited you to reflect and report on your achievements throughout the PDR period.

Following completion of the self-assessment, the PDR will be returned to your supervisor for their review prior to the end of term assessment meeting.

In the sections which follow you can view (but not edit) your original PDR established at the beginning of the PDP period; and reflect on your progress and achievements over the review period by completing the free text fields throughout the document.

Click on the to proceed.
5. The staff member should indicate if and development or training activities was undertaken in the period

### Development and Training Activities

**Relevant training opportunities**

You can access the HORUS training webpage [here](#).

The training details below outline planned and scheduled training activities identified in the PDR planning and mid-term review stages.

It is advised that you review the training details listed below, and update with any additional training that was undertaken during the PDR term.

<table>
<thead>
<tr>
<th>Development and training activities</th>
<th>Complete by</th>
<th>Completed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Training</td>
<td>10/12/2015</td>
<td></td>
</tr>
</tbody>
</table>

Click on the **→** to proceed.
6. The staff member should provide comments against each performance objective that outlines their achievements for the period.

### Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

<table>
<thead>
<tr>
<th>Performance Objectives and Indicators</th>
<th>Supervisor Mid-Term Assessment</th>
<th>End of Term Self-Assessment</th>
<th>Supervisor Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Performance Objective 1</td>
<td>Supervisor mid-term comment 1</td>
<td></td>
<td>(Supervisor to complete)</td>
</tr>
<tr>
<td>• Indicator 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Indicator 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 - Performance Objective 2</td>
<td>Supervisor mid-term comment 2</td>
<td></td>
<td>(Supervisor to complete)</td>
</tr>
<tr>
<td>• Indicator 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the to proceed.
7. The staff member will be able to view their development activities stated at the commencement of the plan, and provide overall comments in relation to their achievements over the term.

Development needs, opportunities and actions:

Skills to be developed including:

Specific actions

Overall End of Term Self-Assessment

In capturing your overall end of term self-assessment in the comments box below, you may wish to list and comment on your major achievements (including those outside of the objectives set) as well as any area/s where objectives were not met detailing the reasons why (both within and outside of your control).

In outlining your key achievements, you should include any development activities that have you participated in which have assisted with the achievement of your objectives or improved your performance.

Overall self-assessment comments:

The staff member can then submit their self-assessment to their supervisor for review, prior to the end of term performance discussion.
End of term Review - Supervisor Assessment

The supervisor will receive an email to notify them that the staff member has completed their end of term review self-assessment.

1. The supervisor will receive an email notification that form action is required.
2. The supervisor should login to ANU eForms using their UID and password.
3. The form will appear in the Forms Assigned to Me section

   Forms Assigned To Me

   Performance and Development Review - Supervisor Finalise End-Term Assessment

   Penny Smith

   Click on the form to enter

4. The supervisor is required to review the PDR and any comments provided by the staff member as part of their end of term self-assessment.

   Introduction

   End of Term Assessment

   Penny Smith’s PDR is ready for final assessment and rating.

   The end of term assessment is an opportunity for a supervisor and staff member to meet and review the overall progress and achievements of the staff member relative to opportunity throughout the PDP period.

   Based on the outcomes of the discussion, and any other relevant evidence, you are required to identify an overall performance rating for the staff member against the performance objectives.

   In the following document you will be able to view the original PDR, the mid-term review comments against objectives, and the staff member’s self-assessment, and provide end of term feedback against the performance objectives.

   Click on the to proceed.

5. The supervisor can confirm if training has been completed
### Development and Training Activities

Relevant training opportunities

You can access the HORUS training webpage [here](#).

The training details below outline planned and scheduled training activities identified in the PDR planning and mid-term review stages.

It is advised that you review the training details listed below, and update with any additional training that was undertaken during the PDR term.

<table>
<thead>
<tr>
<th>Training</th>
<th>Complete by</th>
<th>Completed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Training</td>
<td>10/12/2015</td>
<td></td>
</tr>
</tbody>
</table>

Click on the [ ] to proceed.
6. The supervisor should provide comment on the staff member’s achievements against the performance objectives.

<table>
<thead>
<tr>
<th>Performance Objectives and Indicators</th>
<th>Supervisor Mid-Term Assessment</th>
<th>End of Term Self-Assessment</th>
<th>Supervisor End of Term Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Performance Objective 1</td>
<td>Supervisor mid term comment</td>
<td>End of term self assessment staff member</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Supervisor end of term assessment comments</td>
</tr>
<tr>
<td>2 - Performance Objective 2</td>
<td>Supervisor mid term comment</td>
<td>End of term self assessment staff member</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Supervisor end of term assessment comments</td>
</tr>
</tbody>
</table>

Click on the ➤ to proceed.
The supervisor can review the staff member’s comments and provide overall comments in relation to the career and development activities undertaken during the period to date.

**Development needs, opportunities and actions:**

*Skills to be developed including:*

*Specific actions*

---

**Penny Smith’s Overall Self Assessment**

**Overall end of term self assessment comments from the staff member**

**Supervisor Overall Assessment**

Please provide general comments on Penny Smith’s progress towards achieving the expectations set in the PDR planning stage:

---

Click on the [ ] to proceed.
8. The supervisor will need to provide an overall performance rating and comments for the period.

Once the performance rating and comments have been provided, the supervisor can submit the form to the staff member for their acknowledgement.
If the performance rating of the staff member is unsatisfactory, the supervisor will be required to send the PDR end of term assessment to the Local HR area prior to finalising the form.

<table>
<thead>
<tr>
<th>Area</th>
<th>Rating</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall assessment rating</td>
<td>Unsatisfactory</td>
<td>You have indicated that you wish to rate this staff member’s performance as unsatisfactory. In order to finalise this PDR, the form will now be sent to your Local HR area, who will be in contact with you to discuss the rating further. The Local HR area will also provide support and guidance in relation to the ongoing management of the staff member. If the staff member you supervise is part of a Local HR team, your request should be sent to the Central HR Division.</td>
</tr>
</tbody>
</table>

Select the appropriate Local HR area from the drop down list.
Please note: if you select CMBE/CPMS HR, you will be required to select the appropriate HR hub. Click [here](#) to view Hub support details.

**End of Term Review - Staff member review acknowledgement**

The staff member will receive an email to notify them that their end of term performance and development review assessment has been completed.

1. The staff member will receive an email notification that form action is required.
2. The staff member should login to [ANU eForms](#) using their UID and password.
3. The form will appear in the Forms Assigned to Me section
   
   **Forms Assigned To Me**
   
<table>
<thead>
<tr>
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<th>Assigned By</th>
<th>Date Assigned</th>
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</tr>
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<tbody>
<tr>
<td>Performance and Development Review - Staff Member Assessment Acknowledgement</td>
<td>Peter Brown</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Click on the form to enter

4. The staff member will be prompted to review the document

   **Introduction**
   
   Based on the outcomes of end of term review discussions with Peter Brown, they have identified an overall performance rating against the performance objectives for the PDP period.

   Please carefully review the feedback and comments listed on the following pages, and refer to your Supervisor in the first instance regarding any questions or concerns.

   At the end of this form you will be prompted to acknowledge the performance rating to finalise the PDR for this review period.

5. The staff member will be able to see the supervisor’s comments against the objectives over the review period.
Performance Objectives

Performance objectives and measurable performance indicators are to be set at the start of the PDP review period. Subject to agreement between a supervisor and staff member, objectives may be varied during the review period according to emerging needs of the local work area.

Performance Objectives and Indicators

1. Performance Objective 1
   - Indicator 1
   - Indicator 2

2. Performance Objective 2
   - Indicator 1

Supervisor Mid-Term Assessment
- Supervisor mid term comment

Supervisor End of Term Assessment
- Supervisor end of term assessment comments

Click on the ➔ to proceed.

6. The staff member will be able to view the overall assessment comments against the career development and training activities over the period.

Overall Assessment

Supervisor Overall Assessment Feedback

The following are comments provided by the supervisor in relation to your overall progress towards achieving the expectations set out in the PDR planning stage:

Supervisor end of term overall assessment comments

Click on the ➔ to proceed.

7. The staff member will be able to review the overall assessment rating and comments provided by the supervisor.
The staff member can choose to provide comments to the supervisor in relation to the assessment.

The staff member can then click submit to finalise the performance review.