



Australian
National
University

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.

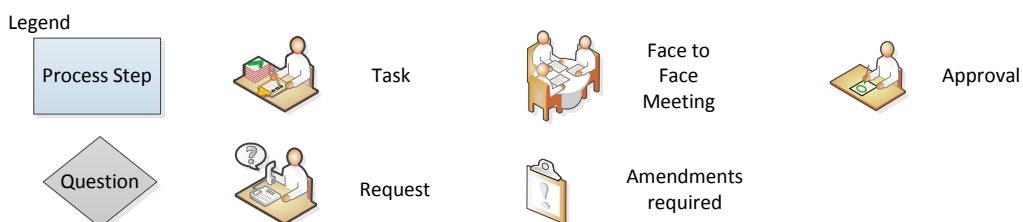
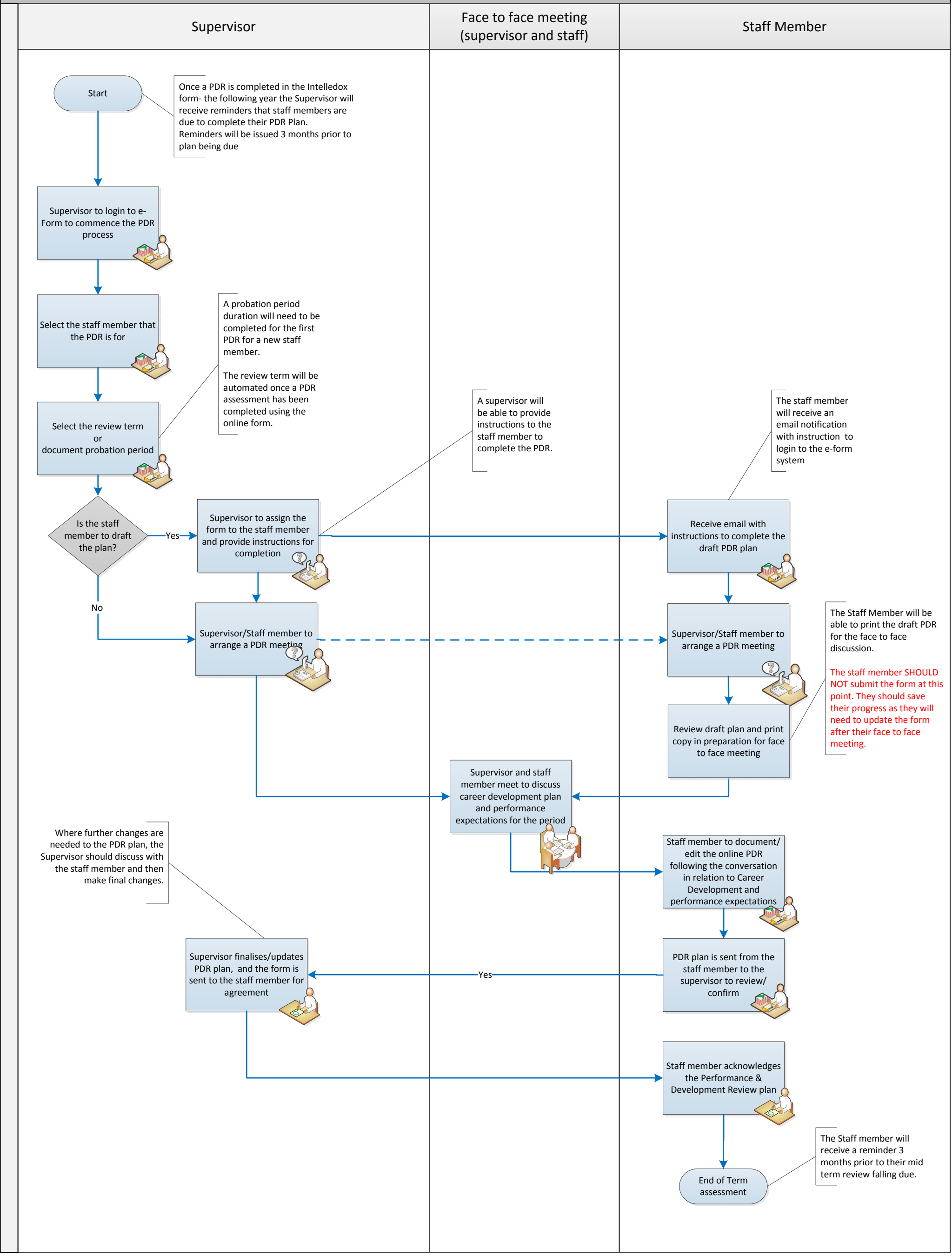
Alternatively, if staff members appear in this list that shouldn't, Local HR areas will also be able to assist.

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




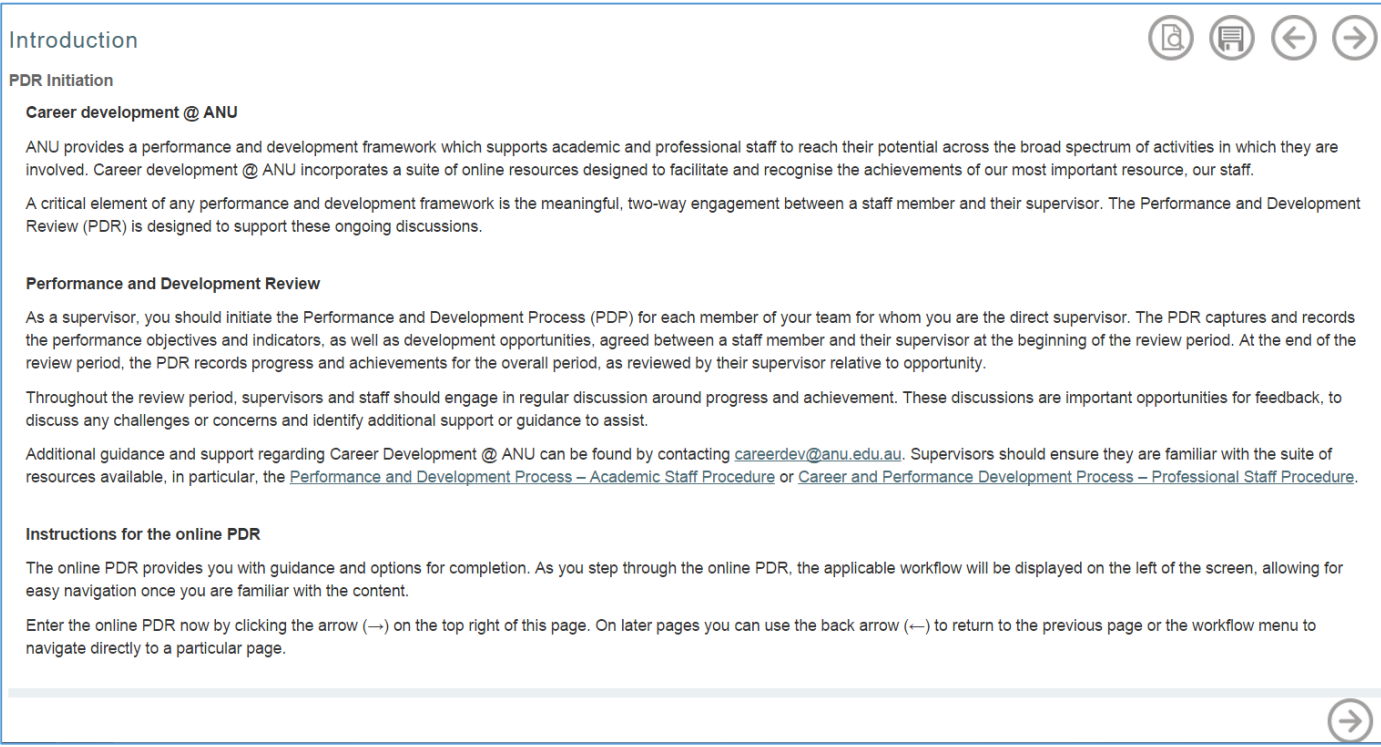

Developing the Performance and Development Review Plan- Professional Staff

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


1.	Supervisor to ANU eForms using UID and HORUS password
2.	Select the Performance and Development Review form 
3.	<p>The Introduction page provides details on the Performance and Development Review process.</p>  <p>Click on the  to proceed.</p>








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

UID	u8888888	Position	Administrator (Position #1234321
Probation Confirmation Date	1/01/2009	Department / School / Centre	College Executive

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

UID	u8888888	Position	Administrator (Position #1234321
Expected Probation Date	1/01/2016	Department / School / Centre	College Executive

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?*

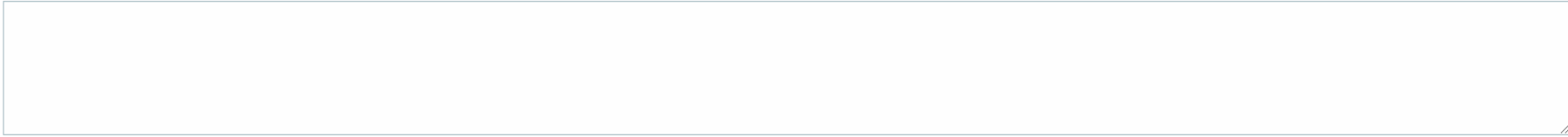
- Send to staff member to draft PDR
 I would like to draft the PDR



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



An email will be sent to Penny Smith requesting they contribute to the PDR. Please write a short message outlining how they should contribute.



Submit for staff member contribution

Introduction

Staff member

PDR Initiation

Previous PDRs

Staff Career Development

Development and Training Activities

Work Health and Safety (WHS)
Responsibilities

Performance Objectives

Submission

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

Forms Assigned To Me

Form	Assigned By	Date Assigned	Comment
Performance and Development Review - Staff Member PDR Plan Contribution	Peter Brown		

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_000666 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.

The image shows a rich text editor interface. At the top is a toolbar with various icons for text formatting and editing. Below the toolbar is a large, empty text area where content can be entered. A blue arrow points from the right side of the text area towards the left, indicating the starting point for text entry.



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.

A rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, undo, redo, subscript, and superscript. Below the toolbar is a large empty text area with a blue arrow pointing to it from the right.

Long range (4-5 years) career development plan

A rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, undo, redo, subscript, and superscript. Below the toolbar is a large empty text area with a blue arrow pointing to it from the right.

Click on the  to proceed.

7. If you are on probation, the mandatory online courses will be displayed.



There are mandatory online training modules that are part of a new staff member's PDR. Confirmation of appointment (successful probation period) is conditional on completion of these modules:

- Code of Conduct (HRCOC)
- Harassment Bullying and Discrimination (HRHBD)
- Aboriginal Cultural Awareness (HRICA)
- Work Health and Safety (HRWHS)

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

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.

Development and training activities
Complete by

↑

↑

+
-

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.

9. Draft the performance objectives and measurable performance indicators in the box below.

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.

Performance Objectives *	Measurable Performance Indicators *	Supervisor Assessment
<input type="checkbox"/> <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	<input type="checkbox"/> Indicator 1 * <input type="text"/>	(Not available until end of term)
<input type="checkbox"/>		
<input type="checkbox"/>		

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.


Submission

Draft Performance Plan

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.

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.

Please note: If you have not had your face to face discussion, please DO NOT submit this form.

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

Forms Assigned To Me

Form	Assigned By	Date Assigned	Comment
Performance and Development Review - Staff Member PDR Plan Contribution	Peter Brown		

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.

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.	<p>The form will appear in the Forms Assigned to Me section</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p>Forms Assigned To Me ⌵</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Form</th> <th style="width: 20%;">Assigned By</th> <th style="width: 15%;">Date Assigned</th> <th style="width: 15%;">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> <p>Click on the form to enter</p> </div>	Form	Assigned By	Date Assigned	Comment	Performance and Development Review - Supervisor Signoff- PDR Plan	Penny Smith		
Form	Assigned By	Date Assigned	Comment						
Performance and Development Review - Supervisor Signoff- PDR Plan	Penny Smith								
4.	<p>The Supervisor should review and can edit the details in all of the form pages</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p>Introduction 📄 🗨️ ➔</p> <p>Plan, Review and Approve - Supervisor</p> <p>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.</p> <p><i>Note: You should discuss any changes with the staff member before submitting the form.</i></p> </div>								



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.

B *I* U ABC [List icons] [ABC dropdown]

[Cut] [Paste] [Image] [Table] [Link] [List] [List] [List] [List] [Undo] [Redo] [x] [x²] [Ω]

Mid range career development plan

Objective 1

Objective 2

Long range (4-5 years) career development plan

B *I* U ABC [List icons] [ABC dropdown]

[Cut] [Paste] [Image] [Table] [Link] [List] [List] [List] [List] [Undo] [Redo] [x] [x²] [Ω]

long range 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.

Development and training activities	Complete by
<input type="checkbox"/> Management Training	<input type="text"/>
<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="📅"/>

Click on the  to proceed.



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.

Performance Objectives * ?	Measurable Performance Indicators * ?	Supervisor Assessment ?
<input type="checkbox"/> <input type="checkbox"/> Performance Objective 1	<input type="checkbox"/> <input type="checkbox"/> Indicator 1 * <input type="text" value="Indicator 1"/> <input type="checkbox"/> <input type="checkbox"/> Indicator 2 * <input type="text" value="Indicator 2"/> <input type="button" value="+"/> <input type="button" value="-"/>	(Not available until end of term)
<input type="checkbox"/> <input type="checkbox"/> Performance Objective 2	<input type="checkbox"/> <input type="checkbox"/> Indicator 1 * <input type="text" value="Indicator 1"/> <input type="button" value="+"/> <input type="button" value="-"/>	(Not available until end of term)
<input type="button" value="+"/> <input type="button" value="-"/>		

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 with 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.	<p>The form will appear in the Forms Assigned to Me section</p> <p>Forms Assigned To Me</p> <table border="1"> <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> <p>Click on the form to enter</p>	Form	Assigned By	Date Assigned	Comment	Performance and Development Review - Staff Member Plan Acknowledgement	Peter Brown		
Form	Assigned By	Date Assigned	Comment						
Performance and Development Review - Staff Member Plan Acknowledgement	Peter Brown								
4.	The staff member will see a read only version of the form and all of the fields that have been completed.								



Introduction



Plan, Review and Approve - Staff Member

Based on the outcomes of the previous PDR planning steps, a finalised Performance and Development Review plan has been created. Further to your discussions with Peter Brown please review the PDR plan contained on the following pages, as changes may have been made since your last review.

At the end of this form you will be prompted to acknowledge the PDR plan. Once you acknowledge and submit this form, the PDR plan will be finalised and stored within the electronic records management system (ERMS) on your staff file.

5. At the end of the form the staff member will be asked to acknowledge the performance review plan.

Final Plan Submission



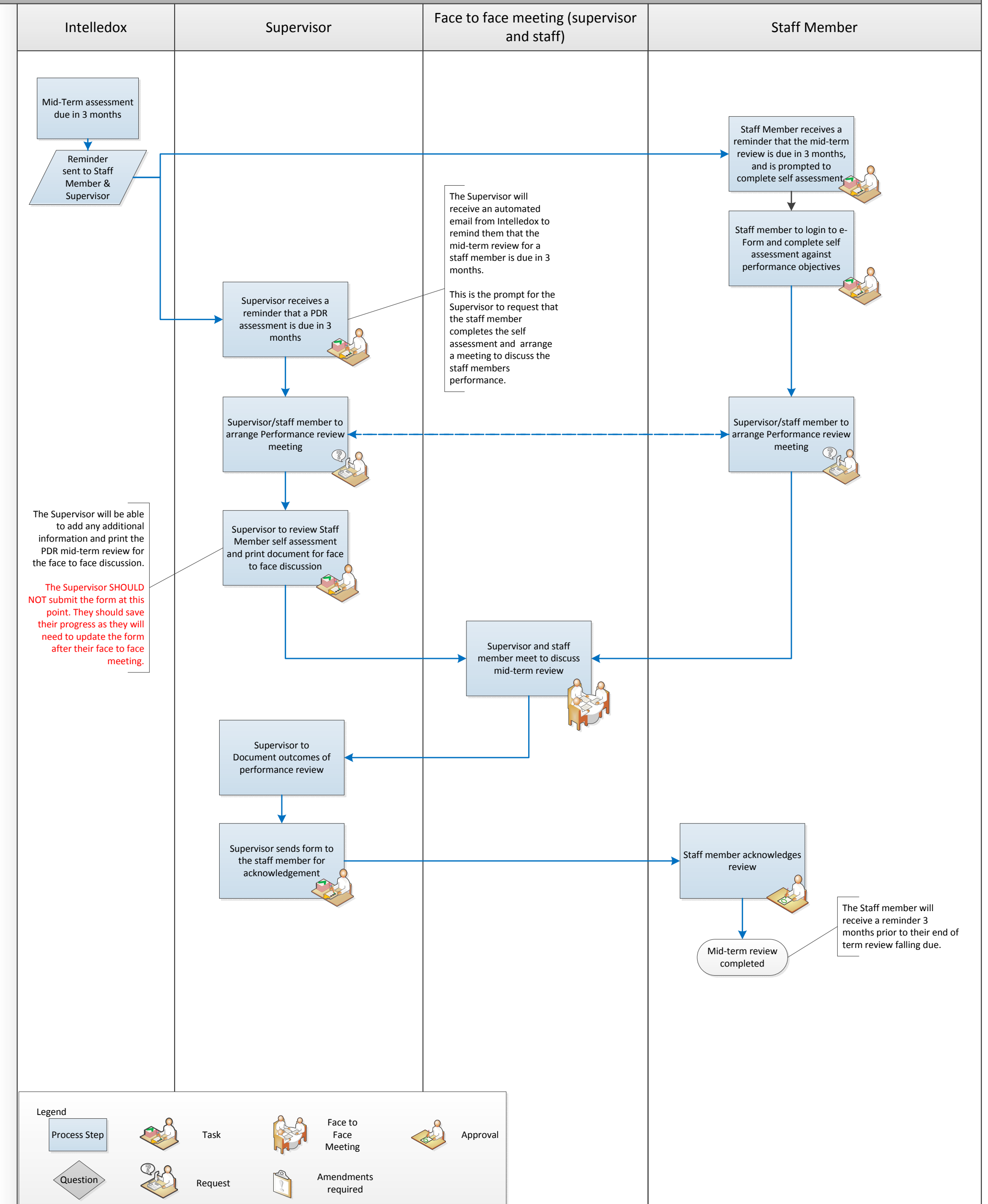
By clicking submit, you confirm that you have met with your supervisor to finalise this PDR and that the outcomes of that discussion are documented in this form.

You are encouraged to engage frequently with your supervisor regarding your progress. It is advisable to address any potential challenges or issues in relation to achievement of the objectives contained with this PDR as soon as they are identified

Acknowledge and submit PDR

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



Mid-term PDR Review- Professional Staff

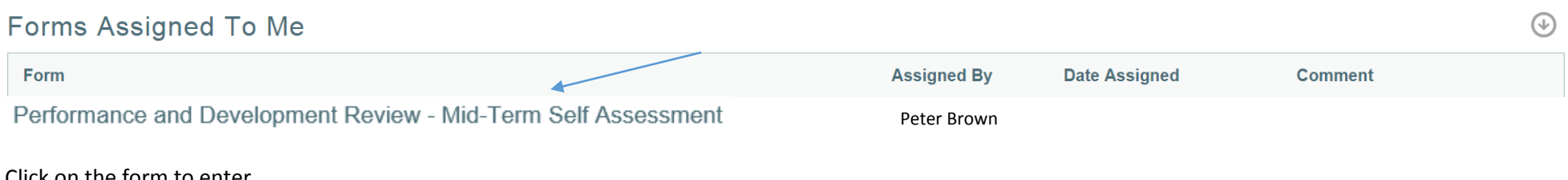
This reference guide provides an overview of the process when completing the mid-term PDR review.

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.	<p>The form will appear in the Forms Assigned to Me section</p>  <p>Click on the form to enter</p>
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

Mid-Term Self Assessment *

Supervisor Assessment

(Supervisor to complete)

2 - Performance Objective 2

- Indicator 1

(Supervisor to complete)

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.

Overall Mid-Term Self-Assessment

In capturing your overall mid-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*:

A large, empty rectangular text box with a thin border, intended for entering self-assessment comments. A blue arrow points to the top center of the box.

Submit to supervisor for mid-term assessment

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 login to ANU eForms using their UID and password.								
3.	<p>The form will appear in the Forms Assigned to Me section</p> <div data-bbox="159 502 2101 694" style="border: 1px solid #ccc; padding: 10px;"> <p>Forms Assigned To Me ⌵</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Form</th> <th style="width: 20%;">Assigned By</th> <th style="width: 15%;">Date Assigned</th> <th style="width: 15%;">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> <p>Click on the form to enter</p> </div>	Form	Assigned By	Date Assigned	Comment	Performance and Development Review - Mid-Term Review	Penny Smith		
Form	Assigned By	Date Assigned	Comment						
Performance and Development Review - Mid-Term Review	Penny Smith								
4.	<p>The supervisor can determine if changes are required to the performance objectives for the remainder of the term</p> <div data-bbox="159 774 2101 1380" style="border: 1px solid #ccc; padding: 10px;"> <p>Introduction 📄 🗨️ ➔</p> <p>Mid-Term Review</p> <p>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.</p> <p>As a supervisor you are now required to complete a mid-term assessment of Penny Smith’s career development and performance against key objectives.</p> <p>You will be able to view the development goals and performance objectives documented in the PDR planning stage and provide comments.</p> <p>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.</p> <p>How would you like to proceed?*</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Complete mid-term assessment with no changes to the PDR <input type="radio"/> Complete mid-term assessment and amend the PDR </div>								



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 by clicking the -> to proceed.

Introduction
Development and Training Activities
Work Health and Safety (WHS) Responsibilities
Performance Objectives
Overall Assessment
Mid-Term Review Submission

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





Click on the





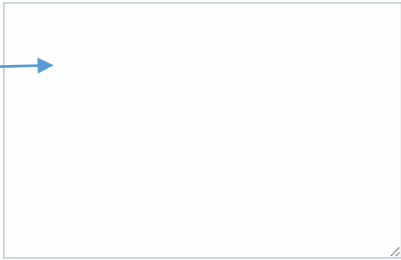

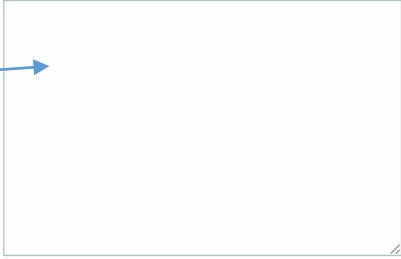

to proceed.



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.

Performance Objectives and Indicators	Mid-Term Self Assessment * 	Supervisor Mid-Term Assessment * 
1 - Performance Objective 1 <ul style="list-style-type: none">Indicator 1Indicator 2	Self-assessment comment 1	 
2 - Performance Objective 2 <ul style="list-style-type: none">Indicator 1	Self-assessment comment 1	 

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.

Staff Member's Overall Self Assessment

The following details the self-assessment undertaken by Penny Smith:

Overall self assessment Assessment against development needs

Supervisor Overall Mid-Term 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.



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.	<p>The form will appear in the Forms Assigned to Me section</p> <div data-bbox="165 1161 2101 1342"> <p>Forms Assigned To Me</p> <table border="1"> <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> </div> <p>Click on the form to enter</p>	Form	Assigned By	Date Assigned	Comment	Performance and Development Review - Mid Term Review Staff Member Acknowledgement	Peter Brown		
Form	Assigned By	Date Assigned	Comment						
Performance and Development Review - Mid Term Review Staff Member Acknowledgement	Peter Brown								
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 PDR 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	Mid-Term Self Assessment *	Supervisor Mid-Term Assessment * ⓘ
1 - Performance Objective 1 <ul style="list-style-type: none"> Indicator 1 Indicator 2 	Self-assessment comment 1	Supervisor mid-term comment 1
2 - Performance Objective 2 <ul style="list-style-type: none"> Indicator 1 	Self-assessment comment 1	Supervisor mid-term comment 2

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.

Mid-Term Review Submission

You have the opportunity to provide any comments/feedback in relation to your mid-term review. Peter will be notified of comments/feedback upon submission of this form.

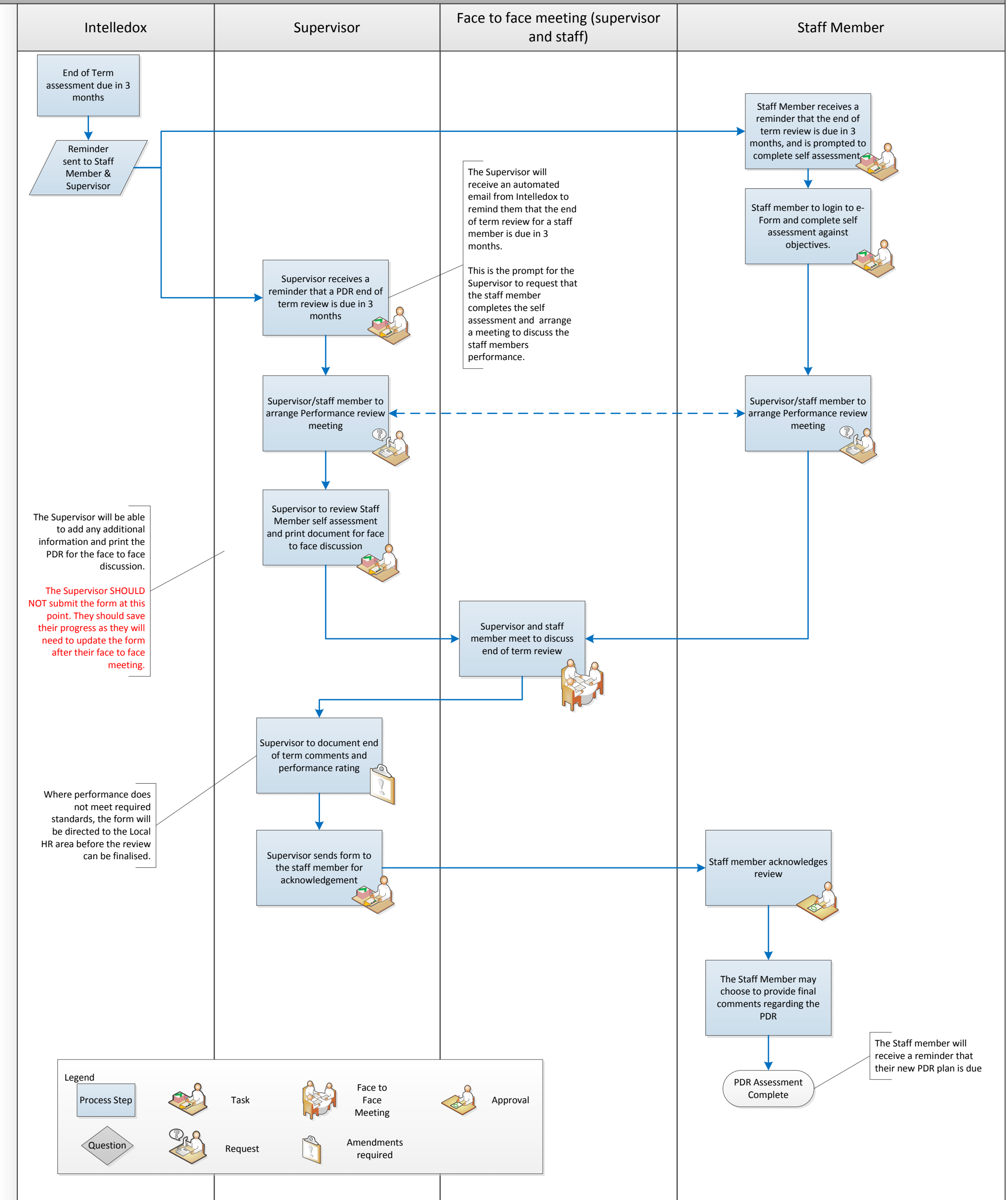
Mid term staff member comments on assessment

I confirm that I have met with to discuss my mid-term review as part of the Performance Development Process. The outcomes of that discussion are documented in this PDR, and I accept any changes made to the original PDR.*

Complete mid-term assessment

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



End of Term PDR Assessment- Professional Staff

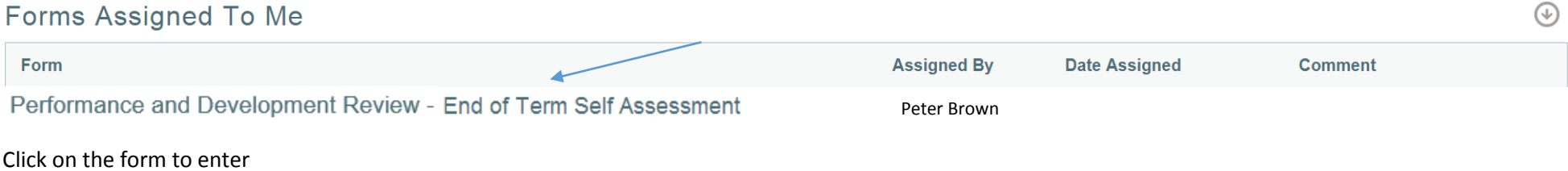
This reference guide provides an overview of the process completing the End of Term PDR assessment.

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.	<p>The form will appear in the Forms Assigned to Me section</p>  <p>Click on the form to enter</p>
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.

Development and training activities	Complete by	Completed?
<input type="checkbox"/> Management Training	10/12/2015	<input checked="" type="checkbox"/>



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.

Performance Objectives and Indicators	Supervisor Mid-Term Assessment *	End of Term Self-Assessment *	Supervisor Assessment
1 - Performance Objective 1 <ul style="list-style-type: none"> Indicator 1 Indicator 2 	Supervisor mid-term comment 1		(Supervisor to complete)
2 - Performance Objective 2 <ul style="list-style-type: none"> Indicator 1 	Supervisor mid-term comment 2		(Supervisor to complete)

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:*

A large empty text box for entering overall self-assessment comments. A blue arrow points from the top right towards the center of the box.

Submit for supervisor assessment

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.	<p>The form will appear in the Forms Assigned to Me section</p> <div data-bbox="159 502 2101 694" style="border: 1px solid #ccc; padding: 10px;"> <p>Forms Assigned To Me ⌵</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Form</th> <th style="width: 20%;">Assigned By</th> <th style="width: 15%;">Date Assigned</th> <th style="width: 15%;">Comment</th> </tr> </thead> <tbody> <tr> <td>Performance and Development Review - Supervisor Finalise End-Term Assessment</td> <td>Penny Smith</td> <td></td> <td></td> </tr> </tbody> </table> <p>Click on the form to enter</p> </div>	Form	Assigned By	Date Assigned	Comment	Performance and Development Review - Supervisor Finalise End-Term Assessment	Penny Smith		
Form	Assigned By	Date Assigned	Comment						
Performance and Development Review - Supervisor Finalise End-Term Assessment	Penny Smith								
4.	<p>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.</p> <div data-bbox="159 778 2063 1265" style="border: 1px solid #ccc; padding: 10px;"> <p>Introduction 📄 🗨️ ➔</p> <p>End of Term Assessment</p> <p>Penny Smith's PDR is ready for final assessment and rating.</p> <p>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.</p> <p>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.</p> <p>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.</p> </div> <p>Click on the ➔ to proceed.</p>								
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.

Training	Complete by	Completed?
<input type="checkbox"/> Management Training	10/12/2015	<input checked="" type="checkbox"/>

+ -

Click on the



to proceed.



6. The supervisor should provide comment on the staff member's achievements against the performance objectives.

Performance Objectives



Professional 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	Supervisor Mid-Term Assessment *	End of Term Self-Assessment *	Supervisor End of Term Assessment *
1 - Performance Objective 1 <ul style="list-style-type: none"> Indicator 1 Indicator 2 	Supervisor mid term comment	End of term self assessment staff member	Supervisor end of term assessment comments
2 - Performance Objective 2 <ul style="list-style-type: none"> Indicator 1 	Supervisor mid term comment	End of term self assessment staff member	Supervisor end of term assessment comments



Click on the



to proceed.



7. 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.

Performance Rating

Consider the staff member's performance over the review period, taking into account all factors which affected performance and whether the staff member successfully achieved the agreed outcomes for the review period.

The applicable review ratings reflect the following standards :

- **Outstanding** Where a staff member demonstrates performance and behaviour which consistently exceeds expectations.
- **Meets expectations** Where overall the staff member demonstrates consistent and sustained performance, with all objectives being met, and exhibits behaviour which is consistent with ANU Values and the Code of Conduct. The vast majority of staff would be expected to be in this category.
- **Unsatisfactory** Where the staff member's performance and/or behaviour falls short of what is expected for the position they hold, and/or the required performance objectives and indicators. In these circumstances the supervisors should consult with College or Divisional HR contacts and will have initiated action, or be in the process of initiating action, in accordance with the managing underperformance procedures.

Area	Rating *	Comments *
Overall assessment rating	<input type="text"/>	<input type="text"/>

Once the performance rating and comments have been provided, the supervisor can submit the form to the staff member for their acknowledgement.



Area	Rating *	Comments *
Overall assessment rating	<input type="text" value="Meets expectations"/>	<input type="text" value="You have met expectations over this period. These are general comments about your performance for the full period."/>
<input type="button" value="Submit for staff member agreement"/>		

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.

Area	Rating *	Comments *
Overall assessment rating	<input type="text" value="Unsatisfactory"/>	<input type="text"/>
<p>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.</p> <p>If the staff member you supervise is part of a Local HR team, your request should be sent to the Central HR Division.</p>		
<input type="text"/>		
<input type="button" value="Submit to Local HR area"/>		

Select the appropriate Local HR area from the drop down list.



Select the relevant Local HR area: Select your Local HR hub:

CMBE/CPMS HR

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.

- The staff member will receive an email notification that form action is required.
- The staff member should login to [ANU eForms](#) using their UID and password.
- The form will appear in the Forms Assigned to Me section

Forms Assigned To Me ⌵

Form	Assigned By	Date Assigned	Comment
Performance and Development Review - Staff Member Assessment Acknowledgement	Peter Brown		

Click on the form to enter
- 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.
- 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

Supervisor Mid-Term Assessment *

Supervisor End of Term Assessment *

1 - Performance Objective 1

- Indicator 1
- Indicator 2

Supervisor mid term comment

Supervisor end of term assessment comments

2 - Performance Objective 2

- Indicator 1

Supervisor mid term comment

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 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.



Performance Rating



Area	Rating *	Comments *
Overall assessment rating	Meets expectations	You have met expectations over this period. These are general comments about your performance for the full period.

The staff member can choose to provide comments to the supervisor in relation to the assessment.

Would you like to provide additional comments?

Yes
 No

Text area for providing additional comments to the supervisor.

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

A copy of this PDR will automatically be stored on the your personnel file in ERMS. A copy of this document will be sent to yourself and your supervisor upon submission of this form.

By clicking submit, you confirm that you have met with your supervisor to review your performance against objectives, discussed your end of term performance rating and agree that the outcomes of those discussions are documented in this PDR.

Submit