
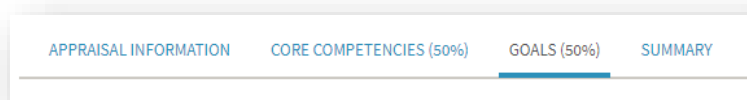


# PLANNING & PERFORMANCE PHASES OF THE e-PDP SYSTEM

**PLANNING** → PERFORMANCE → MID YEAR CHECK-IN → PERFORMANCE → ASSESSMENT → REVIEW

## EMPLOYEE: GOALS

1. Access the e-PDP tool via the Performance and Development Planning page on the [HR website](#) or via the link under 'Employee Tools'
2. Log in using the [single sign-on](#) option to the right of your screen
3. Click onto the **PROFILE ICON**  to the right of the black toolbar and choose **TOTAL TALENT PROFILE**
4. Open the current appraisal in Phase: PLANNING
5. There are four main tabs within the appraisal. Choose the **GOALS** tab between the Core Competencies & Summary tabs



6. Choose **MANAGE GOALS** button to the far right of the screen.
7. Click on the purple **ADD GOAL** button at the top of the Manage Goals window for new Goals
8. If you have a past PDP in the system, you may be able to **IMPORT** past Goals by clicking on the [Browse Employee Past Appraisals](#) hyperlink at the top of the window and choosing an appropriate Goal. From there you can edit your Goal and then press **SUBMIT** at the bottom of the page.
9. If this is your first PDP or if you need to create a new Goal:
  - a. Create a descriptive name for your Goal
  - b. The Goal Score Type should be set to **SCALE**.
  - c. Add your Goal description. *Please note that you must use Notepad if you are copying from Word.*
  - d. A **TARGET DATE** can be left blank
  - e. When complete, scroll to the bottom of the window and click on **SUBMIT**
10. A system email is sent to the hiring manager and employee with every goal created or edited.
11. Are your Goals missing? They might just be in the [Goal List](#) if you imported them from another appraisal. To find your goals and to add them to the PDP, click on the Manage Goals button and you will see your list of goals under '**Available Items**' to the left of the window. Click on the **+**

buttons to choose applicable Goals (manually adjusting the weightings if desired) and when finished, CLICK **SUBMIT**

Manage Goals

Add Goal

Available Items	Selected Items
Goal #1 +	Total Weight 0.00
Goal #2 +	
Goal #3 +	

Submit Cancel

## MANAGER: GOALS & COMPETENCIES

1. Hiring manager clicks on **MY EMPLOYEES** from the black menu section to the left of the screen and chooses the current appraisal for their employee.
2. Manager clicks on the **GOALS** tab and from there they must click on **MANAGE GOALS** to the far right of the screen. Edit the desired weighting of each goal to ensure the total of all goals equal 100%.
3. Once weightings have been added and balanced to 100%, click **SUBMIT**
4. When GOALS are complete, the manager clicks on the **CORE COMPETENCIES** tab
5. Choose **MANAGE COMPETENCIES** to the far right of the screen



6. Click on the **+** buttons to choose applicable competencies (manually adjusting the weightings if desired) and when finished, SCROLL TO THE BOTTOM OF THE WINDOW AND CLICK **SUBMIT**
7. For each CORE COMPETENCY, the manager and employee can add a **JOURNAL ENTRY** to provide clarification and more detail if necessary.
8. On the main APPRAISAL INFORMATION tab, both manager and employee can add a **JOURNAL ENTRY** to the GENERAL APPRAISAL NOTES section immediately under PHASE SIGNATURE REQUIREMENTS. This is a great place to add certificates, accolades, etc, that aren't directly related to a specific competency and goal.

## MANAGER & EMPLOYEE: SIGNATURES

9. When all GOALS, COMPETENCIES and JOURNAL ENTRIES have been made, the manager is alerted to **SIGN** the appraisal.
10. Once signed, the employee is notified that it is their turn to review the final planning phase, discuss further with manager if needed, and then **SIGN** the appraisal.
11. Once both signatures are complete, the appraisal is ready to be moved to the Performance Phase (either manually by the manager or automatically end of day July 31)

This appraisal is ready to move to the next phase.

Move to the Next Phase

12. During the two Performance Phases, meaningful conversations and ongoing discussions should be taking place. Documentation of these discussions can be made as Journal Entries anywhere in the PDP.

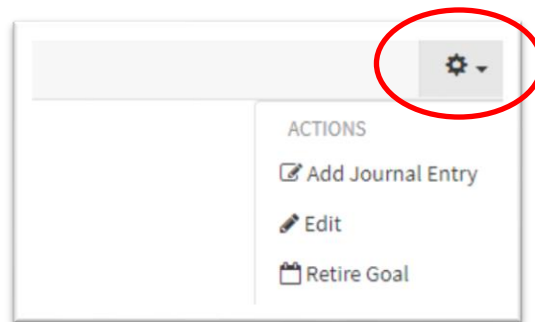
*HINT: The GOALS section can be where you can add your PROFESSIONAL DEVELOPMENTAL opportunities with hyperlinks to courses from Continuing Studies or LinkedIn Learning!*

# MID YEAR CHECK-IN PHASE OF THE e-PDP SYSTEM

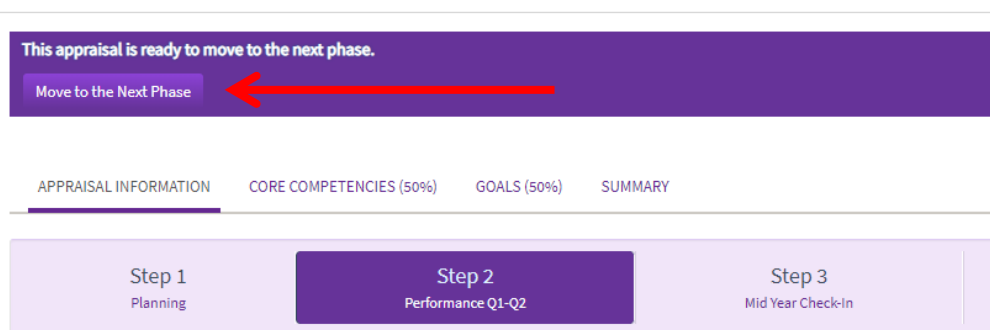
PLANNING → PERFORMANCE → **MID YEAR CHECK-IN** → PERFORMANCE → ASSESSMENT → REVIEW

## Making Updates & Signing Off on the Mid Year Check-In

1. Prior to signing off on the MID YEAR CHECK-IN, changes can be made to any Goal or Competency while you are in the PLANNING or PERFORMANCE Phases. Click on the toggle button to the far right of the Goal or click on Manage Competencies to make these changes. Please note you will need to re-sign off on the PDP if you make edits to any Goals.



2. Once all necessary edits and Journal Entries have been made, the manager can move the appraisal to the MID YEAR CHECK-IN Phase by clicking on the “Move to the Next Phase” button at the top of the screen.



3. You are now in the MID YEAR CHECK-IN Phase (Step 3) of the PDP Cycle where you will have your face-to-face conversations prior to signing the appraisal. If both the manager and employee sign off on the MID YEAR CHECK-IN before December 15<sup>th</sup>, the system will automatically move the appraisal to the next phase on that date. Alternatively, once signatures are complete, the manager will again have the option to manually move to the next phase by clicking the “Move to the Next Phase” button as in the previous examples.

# FINAL ASSESSMENT PHASE OF THE e-PDP SYSTEM



PLANNING → PERFORMANCE → MID YEAR CHECK-IN → PERFORMANCE → **ASSESSMENT** → REVIEW

## FINAL ASSESSMENT SUMMARY

During the Final Assessment Phase (Step 5) of the e-PDP cycle, the employee will complete a self-assessment on each of their Goals and Competencies, followed by the manager who will score the appraisal as well. After the appraisal has been scored, the 2<sup>nd</sup> level manager will have the opportunity to review and approve the appraisal.

## EMPLOYEE

1. Employee receives an email/system notification/ALERT BAR status update telling them to score their own appraisal

### Alerts

- [Score this Appraisal - Appraisal \(Performance and Development Plan 2020-21\) Jody Blair](#)

2. Employee scores each Competency and each Goal, adding comments if necessary

The screenshot shows a form for rating an employee. It includes a "YOUR RATING" section with four radio button options: "0 - Not Meeting Expectations", "1 - Work in Progress/In Training", "2 - Solid Performer", and "3 - Exceptional". Below this is a "COMMENT CAN BE VIEWED BY" dropdown menu currently set to "All". At the bottom is a "COMMENT" text input field.

3. Once all Competencies and Goals have been scored, click **NEXT > FINISH**
4. It is now the Manager's turn to score the appraisal

## MANAGER

1. Manager receives an email/system notification/ALERT BAR status update telling them to score their employee's appraisal
2. Manager scores each Competency and Goal, adding comments if necessary
3. Once all Competencies and Goals have been scored, click **NEXT > FINISH**
4. After appraisal has been scored, it is now ready to be moved to the final REVIEW phase.

# REVIEW PHASE OF THE e-PDP SYSTEM



PLANNING → PERFORMANCE → MID YEAR CHECK-IN → PERFORMANCE → ASSESSMENT → **REVIEW**

## HIRING MANAGER

Manager meets with employee again to conclude review conversation and begin planning for next FY.

Manager can now move the appraisal to the REVIEW phase (STEP 6). Once the appraisal is in this phase, the employee can see both their Self-Assessment and their manager's score on the appraisal.

## EMPLOYEE

1. It is now time to sign the appraisal with the employee signing first.
2. Employee receives an email/system notification/ALERT BAR status update telling them that their appraisal is waiting for their signature.

## HIRING MANAGER

3. Manager receives an email/system notification/ALERT BAR status update telling them that their employee's appraisal is waiting for their own signature.
4. Once the manager has signed the appraisal it can now be closed. Manager clicks on CLOSE APPRAISAL from the purple ALERT BAR