# Guidance for All

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**Guidance for All**

**How to log on to the online PDR system**
You can access your PDR form via the following link: https://planandreview.yorksj.ac.uk/
Single Sign On (SSO) has been set up so you can login using your YSJ username and YSJ password.

**The Me Page**
When you log in you will see your Me page where you can access your PDR form. The Me page works as a home page and can be used to navigate to all aspects of the online PDR site.

This can include:
- **My Reviews** - where you can access your PDR form.
- **My Notes** - you can keep notes throughout the year that can help in your PDR. These can be notes from 1:1 meetings, feedback relating to your work. You can also upload certificates and supporting evidence.
- **Actions Tab** - This page displays any actions you have waiting to be cleared. If actions are not cleared you will receive a system email to notify you of all outstanding actions.
- **Settings** - You can use this to change your password or your preferences.
- **View notifications** - Unlike actions, which require something to be completed in order to progress, notifications highlight any changes that have been made on the system which relate to you.
- **My Linked People** - This is only visible to reviewers.
- **Support** - If you have any queries or problems with the system you can use the support button, at the top of the screen, to send your query.
Actions
The **Actions** page displays any outstanding actions that need completing. These can be to view responses to review forms or approve a meeting date. If the actions are not complete, a system email is generated, this is only generated for as long as the action is outstanding. Once completed, actions will no longer appear in the email, but any new actions will.

System Email
System emails will appear in your Microsoft Outlook Inbox and come from ‘My Plan and Review’. The subject line will indicate what action needs to be taken, for example, Actions require your attention or Review meeting date.

Notifications
Notifications can be viewed from either the **Actions** page or the **Me** page. Unlike actions, which require something to be completed in order to progress, notifications highlight any relevant changes that have been made in the system that relates to a user’s note or form. For example a change in reviewer or a new PDR form has been added.
Support
If you have any queries or issues using the online PDR system, please click on the Support link at the top right of the page. Type in your query and click Submit. Your query will be sent to Staff Development who will assist you with this issue.

Confirming the reviewer details are correct
When you log on for the first time you may be asked to confirm that your reviewer details are correct. If the person listed as your reviewer is correct you can enter your PDR form by clicking Enter Review. If the details are incorrect you can send a support enquiry to Staff Development, so they can correct this information.

Setting the meeting date
Your reviewer will normally contact you to arrange a suitable date for your PDR discussion, however the date can be scheduled by either the reviewer or reviewee. The meeting date must be input into the online PDR system, this can be done by either the reviewee or reviewer.
To set the date, click on the Set date link in the Meeting date and time Box, input the date and time and click Save.
Once input the Meeting date and time Box will turn yellow and an action will be generated for the other party to approve, decline or reschedule the date. Once approved the Meeting Date Box will turn green. The online PDR system will send you a Meeting Date Outlook request and you will be able to add the meeting to your Outlook calendar.
A Meeting date and time must be set and approved before you can finish the PDR process and finalise (sign off) your PDR form.
Can both the reviewer and reviewee be in the same form at the same time?
No, the reviewer and reviewee cannot edit the same PDR form at the same time. A message will be displayed stating the form is locked for editing.

How to open the PDR form
Your PDR Form is located on your Me Page under My Reviews. Click on the PDR form title to open it.

Saving content
At the bottom of each tab on the PDR form you have the option to Save or Save and close. By clicking this you will be saving what you have written but not sharing it with your reviewer. This is useful if you want to start completing your form during the year or you want to think about what you have written before you finally share it with your reviewer.

Your PDR form is set up with fields for reviewee only to complete, reviewer only to complete, and common fields where both the reviewee and reviewer can complete. The content written in the reviewee only fields will only be visible to the reviewer when the reviewee has shared their form, and vice versa. Common field content will be visible to both parties.
Right up until the finalisation process (when the form is signed off), you can change content in your PDR form as often as you like.

Sharing the PDR form
When you are happy with what you have written, you can Share and close using the link in the Share Box. It is only when you share, that your reviewer will be able to see what you have written in your Reviewee only fields. You can still make changes and re-share as often as you like, as long as the PDR form has not been finalised. If you make changes after you have already shared your content with your reviewer you need to remember to click on the Share and close link to re-share your content.

When the PDR form is shared, the Share Box will turn yellow. Once your reviewer has seen and approved the content on the PDR form and shared what they have written with you, the Share Box will turn green.
Any fields which have been changed since the last share will have a view history link. The Share Box needs to be green before you can finalise your PDR form and complete the PDR process.
How to find extra information/guidance on the PDR form
You can click on the (I) icons or embedded hyperlinks on the form for additional guidance.

My Notes
You can keep your notes private (the default setting) or choose to share them with your reviewer. Reviewers can also create and share notes with reviewees.

To add a note:
1) On the Me page, under the Notes section, click Add note
2 ) Complete each section. Each note will consist of:
   • Note title
   • Description
   • Option to share
3) Attach supporting documents by clicking Add files and selecting the required file(s) - or dragging them into the attachment field - then clicking Start upload, files can be uploaded
4) You can Cancel to exit without saving your note, or Save. If you close the pop-up or navigate away, it will not save the note.

How to add supporting documents:
1. Click Add files and select the required file(s) - or drag them into the attachment field
2. Click Start upload
3. You can Cancel to exit without saving your note, or Save. If you close the pop-up or navigate away, it will not save the note

The notes can be used to gather evidence for your PDR throughout the year. You can record relevant information from 1:1 meetings, feedback relating to your work and upload supporting evidence.

How to print the PDR form
From the Me page, click on the PDR form which is located in the My Reviews section. At the top of the page, click on the Go to print-friendly page. You also have the option of saving the PDR form as a print-friendly PDR.

Finalising the PDR form
Finalising the PDR form is the final action you need to take in the PDR process. When you finalise your PDR form, the content is locked and can no longer be changed. The Meeting date and time box and Share box will need to be green before you can finalise the PDR form, this is to show that all necessary steps have been taken.

Finalised and Archived PDR forms
On the Me Page, under the My Reviews section click on the View Finalised reviews link to view finalised PDR forms from previous years.
Extra Guidance for Reviewers

Additional features on a reviewer’s Me page
A reviewer’s Me page will also include:

- **Reports** - Reviewers can access a Usage Report from this link, see page 9 for information about this report.
- **My Linked People** - this page shows reviewers a list of their Linked People, whose reviews they manage. This section displays the reviewee’s progress and whether they have any outstanding actions in relation to their PDR form. By clicking on a user’s name a reviewer can access the reviewee’s Me page and view their progress and notes.
- **Actions** - if an orange triangle is displayed in the Actions box there is an outstanding action for the reviewer in relation to that reviewee. You can view the Action by clicking on to the orange triangle.

Adding comments before sharing the PDR form
The fields on the PDR form are set up as:

- reviewee only input fields.
- reviewer only input fields.
- common fields where both the reviewee and reviewer can input.

A reviewer can add comments in the reviewer only fields to their reviewee’s PDR form at any time using the Save or Save and close buttons. Their comments will only become visible to the reviewee when the reviewer shares them by clicking on the Share Box. Comments added to common fields can be viewed by both parties even before the form is shared.

How to add a note to my reviewee’s PDR form
From the My Linked People Page.
1. Select the reviewee
2. Click on the Reviewee’s Notes
3. Create a new note by clicking on Add note
4. Write note
5. Tick reviewee in the Share with section
How to print my reviewee’s PDR form
A reviewer can print their reviewee’s PDR form from their Me page. At the top of the page click on the Go to print-friendly page.

The Summary section
This is where the reviewer will summarise the key points of the PDR discussion. It is not intended to duplicate comments you have already made in the Reviewer’s Comments box against your reviewee’s Previous Objectives and The Contribution Framework.

Once you have completed the Summary and added your comments on Previous Objectives and The Contribution Framework and selected the Agreed Assessment, you should share what you have written with your reviewee. If you are not ready for the PDR process to be finalised you can use the Share and close link in the Share box to share what you have written with your reviewee. If you are happy with the content of the PDR form and would like to finalise the PDR process you can use the green button Share and request to finalise.

Bulk substitution
Bulk substitution is a feature only available to system administrators. It occurs when there is a change of default reviewer during the review process. When the original reviewer is replaced with another reviewer, any saved/shared information typed in by the original reviewer will no longer be visible to the reviewee but will be visible for the new reviewer. The new reviewer will see these comments in both the reviewer textfield boxes and in the ‘view history’ link. Common fields where the original reviewer has typed a comment will not be erased with the change of reviewer. The new reviewer then has the option to:

- Delete the comments made by the original reviewer
- Amend the comments made by the original reviewer
- Leave the comments made by the original reviewer

The new reviewer needs to decide which option to take before they share the form with the reviewee. If they do not do anything to the form, after the original reviewer has left and share the form, the reviewee will be able to see the comments made by the original reviewer.

Usage Report
Reviewers have a Reports link on their Me page to allow them to access the Usage Report. This report gives a visual representation of the stage that your reviewee’s PDR form is in at the present time, giving the University/school/department/organisation an instant overview of progress and engagement.

The dashboard includes the ability to drill down into further information about the reviewee and about their PDR form. You can also access your reviewee’s PDR form by clicking on the Form button next to their Status. The Profile button will take you to your reviewee’s Me page.