PDR System Guide for Managers
How to complete the PDR Year End form

This System Guide is designed to show you how to use the online Performance and Development Review (PDR) tool.

- This Guide covers instructions for managers to complete the PDR forms for your staff. It would be helpful to first read the separate Guide that has instructions for staff to complete their parts of the form.
- Rating of goals, job knowledge & skills, and competencies on this form is required for those in the EVPT areas. Others may check with your local HR person about how you should complete the form.

The Process

Your staff member writes self assessment → You edit/write assessment → You and your staff member meet → You edit the form, if necessary → Your staff member acknowledges receipt of the form

You solicit feedback about your staff member

To Logon

- Go to the page http://hrweb.mit.edu/performance/pdr then click the button for PDR. Login with your Kerberos username and password.
- For helpful information see MIT’s Knowledge Base (kb.mit.edu). Search for PDR Help and click Performance and Development Review tool - Help Resources
1. This is the Home screen. From here you will navigate to your list of forms.

Complete the steps necessary for the year-end review

1. Solicit external feedback.
2. Edit the form sent to you by your staff member.
   - If your local area calibrates employees’ overall ratings, enter any changes based on calibration.
3. Hold a 1:1 year-end review meeting with your staff member.
4. Edit the form as necessary after the meeting and send it to your staff member.
5. Make sure the staff member has acknowledged receipt of the form.

Special Note - Pasting from Word

Copy-pasting long or formatted text directly from Microsoft Word into a PDR form can lead to errors. Those who would like to bring text from MS Word into PDR can do so safely by taking intermediate steps:

1. Select and copy the desired text from MS Word.
2. Paste the text into a text-editor program (Notepad on Windows; TextEdit on Mac).
3. In the text editor, re-select and copy the text.
4. Paste the text into the PDR form.
5. Use the PDR system’s built-in formatting tools as needed.

If problems occur (including inexplicably exceeding the character limits, strange formatting, puzzling error messages, or other odd behavior), you may be able to fix it:

- In any field into which Word content was pasted, Select All and delete the entry.*
- Reenter the text, either by typing or copy-pasting from a text editor (see above).

However, some forms may have become so corrupted that only starting from a fresh form will enable you to work with the form. If this happens, please report it to your local PDR contacts (http://hrweb.mit.edu/performance/pdr/local).

*Selecting All ensures that Word’s hidden HTML tags are deleted along with the visible text.
2. Solicit feedback for your staff member’s review. This is optional.

Click Team Overview to initiate “Ask for Feedback”

Click Ask for Feedback

Click to add an email address of someone not in the PDR system.

Message:

Dear MIT Colleagues,

Li A. Liu and I are preparing for his/her upcoming performance review and development discussion and would appreciate your input. I will summarize all input and share the themes with him/her without attribution.
Click to select a staff member, or type the first three letters of a name in the Find an employee box. You may need to wait a few seconds for a list of names to appear.

People selected will appear here.

You may edit the message below.

Feedback is provided via an email and is viewable only to the manager, here within the form. Click Supporting Information.

Scroll down to see additional comments.
Locate and open the PDR form that your staff member has sent.

- Only forms awaiting action by you are displayed when Inbox is selected. To see other forms, click All Forms (or other display filters) in the box on the left.
- Managers with lots of forms may wish to sort by column.

Review, comment and add ratings to the employee’s form.

The form contains the following sections. You will have a number of parts to complete. Some may be optional for your area this year so be sure to check with your local HR person.

Scroll through the form to see all the sections.

- Work Goals and Accomplishments
- Specific Job Knowledge and Skills
- Developmental Goals and Activities
- Core Competencies
- Manager’s Annual Review Summary
4. Rate and comment on staff member’s work goals and accomplishments.

- Check the form header to be sure you’ve opened the correct form for the correct staff member.
- Scroll to find the Work Goals section.
- If a staff member has omitted anything, you may add it yourself or you can scroll to the bottom of the form and click Send Back.
- If a goal is no longer relevant, click Edit and change its status to No Longer Applicable, and choose the rating Not Applicable.
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 2).

5. Update and comment on staff Development Goals and Additional Development Activities

- Unlike Work Goals, Development Goals are not rated. Otherwise, the process is the same as in the previous step.
6. Rate and comment on staff member’s specific job knowledge and skills

Specific knowledge and skills required for one’s job may include technical skills, knowledge of software packages, professional standards, work processes, knowledge of regulations, etc. These may come from a current job description, if available. Exclude items listed in the Core Competencies below.

At year end only, rate overall performance on the employee’s Specific Job Knowledge and Skills and/or on the requirements of their Job Description, and add supporting comments.

Rate employee’s Specific Job Knowledge and Skills

Add comments about performance on Job Knowledge and Skills

Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 2).
7. Rate and comment on the eight Core Competencies.

- Rating and commenting on the Core Competencies are required for all EVPT areas. They may be optional for your area. Check with your local HR person or PDR administrator.
- Use the Writing Assistant (optional) to help with language about competencies.
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 2).
8. Add the overall rating and summary statement, then share form with employee.

- If your local area calibrates employees’ overall ratings, enter any changes based on calibration before clicking “Share with Emp.” Check with your local HR person or PDR administrator if you have any questions about your local process.
- If you navigate away from the second screen without clicking “Share with Emp,” the form will remain in the current step. Instead, click the “Send to Manager” button to confirm.
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 2).
9. Save, print or create a PDF file of this form (optional).

- Scroll to the top of the form for access to these options.
- Choosing the “Save” icon saves the form so you can continue working.
- It’s best to use the print icon at the top right of the form rather than your browser’s print function.
- Click on Actions to spell check the form

Now hold your Annual Review meeting.
10. Make final edits and send the form for acknowledgement.

After your Annual Review conversation, open the staff member’s form and make any necessary edits. When the form is complete, click “Send for acknowledgement.”

Enter email comments to employee here (optional).

Click “Send for acknowledgement” to confirm.

- If you navigate away from this screen without clicking “Send to Employee for acknowledgement,” the form will remain in this step. You need to click two “Send to Employee for acknowledgement” buttons in a row.
- Once the employee acknowledges receipt, this form will be available to you and the employee in the Completed folder.

When the staff member acknowledges receipt of the form, then the Annual Review process is complete.