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

- This Guide covers instructions for staff to complete their Self-Assessment in their PDR form. A different Guide has instructions for your manager.
- Rating of goals 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

- You write self assessment
- Your manager writes assessment
- You and your manager meet
- Your manager edits the form, if necessary
- You acknowledge receipt of the form
- Your manager solicits feedback

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.
1. This is the Home screen. From here you will navigate to your list of forms.

2. On the Performance & Development screen locate and open your PDR form.

- Only forms awaiting action by you are displayed when Inbox is selected. To see other forms, click All Forms (or other display filters) in box on left.
- Click Display Options to hide or show column-selection check-boxes.
Complete your self-assessment in the online PDR Form.

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

Scroll through the form to see all the sections.

- Work Goals
  - Additional Accomplishments
- Developmental Goals
  - Additional Development Activities
- Specific Job Knowledge and Skills
  - Comments about Job Knowledge and Skills
- Core Competencies

**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:

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

If problems occur (including inexplicably exceeding the character, 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.* any entries that were pasted from Word
- 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](http://hrweb.mit.edu/performance/pdr/local)).

*Selecting All ensures that Word’s hidden HTML tags are deleted along with the visible text
3. Rate and comment on your work goals and accomplishments.

- Goal ratings are required for those in the EVPT areas. In other areas they may be optional. Check with your local HR person or PDR administrator.
- Additional Accomplishments may be added by you or by your manager.
- Remember to save using the Save icon on the top right of the form.
- Comments made at Mid Year will still appear.
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 3).
4. Comment on development goals and add development activities.

- Enter any Additional Development Activities not covered by your Development Goals
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 3).
5. Rate and comment on your performance on Specific Job Knowledge and Skills.

Specific job 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.

Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 3).

- Proficiency in Microsoft Word, Excel, and PowerPoint
- Ability to juggle projects and tasks for multiple customers
- Detailed knowledge of departmental procedures around purchasing, organizing, and tracking supplies
- Meeting logistics – knowledge of available caterers, conference rooms, A/V resources, and relevant procedures

Select a rating.

Enter or paste comments about your performance on your specific job knowledge and skills.
6. Rate your performance on the eight Core Competencies and add comments.

- Rating and commenting on the Core Competencies is required for all EVPT areas. It may be optional for your area. Check with your local HR person or PDR administrator.
- Note the issue that may arise when pasting directly from MS Word (see Special Note on pg. 3).

You can use the Writing Assistant for help with phrasing of comments. This is optional.
You may place more than one quote before clicking **Cancel** to return to the form.
7. Save, Print and/or create a PDF copy of your form.

- Once your Self-Assessment is sent to your manager you will no longer be able to edit it. **You should print and review your form before continuing.**
- It’s best to use the print icon at the top right of the form rather than your browser’s print function.
8. Send your form to your manager.

Click the **Save and Close** link if you are not finished. You will be returned to the **My Forms page**.

When ready click to send this form to your manager.

- If you navigate away from this screen without clicking “Send to Manager,” the form will remain in the Self-Assessment step. You will be clicking two “Send to Manager” buttons in a row.
What Happens Next?

1. Your manager will receive an email indicating you have completed this step.
2. Your manager will review your form* and add comments and ratings as appropriate.
3. If your manager has selected “Share with Employee” you will see the manager’s comments and the overall rating.
4. Your manager will hold a review meeting with you, after which your manager will make any required changes to the form and send the form to you.
5. You will receive an email telling you the form is ready in the system.
6. **You have one final step:** add your comments and acknowledge receipt of the final form.

* Your manager may send the form back to you for you to make required changes. If so, you will receive an email notification. Make the changes and send the form your manager again.

9. Acknowledge receipt of your PDR form

Enter your comments here.

Review the entire form then click “Acknowledge Receipt”
• **Acknowledge Receipt** does not imply agreement or disagreement, simply that you have had an opportunity to review this form.

• If you navigate away from this screen without clicking “Acknowledge Receipt,” the form will remain in this step and will not be completed. You will be clicking two “Acknowledge Receipt” buttons in a row.

• This form will be available to you and your current and future managers in the Completed folder.

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**The Year End Review process is now complete.**