

## USER MANUAL DIGITAL P&D-FORM (SUPERVISOR)

*It is highly recommended to use Internet Explorer (32-bits). See for more information the General-section on the self service-website.*

1. In the detail navigation, under P&D Interview, click on *Supervisor* and on the screen you will see the status overview in which you can find the (status of the) digital forms of the employees under your supervision.

### Create form

2. If you wish to create a new form, click on <Create form>:

The screenshot shows a navigation bar with 'Status Overview (0)', 'In Planning (0)', and 'In Process (0)'. Below it, there are tabs for 'Selection criteria', 'View: [Standard View]', and a 'Create form' button circled in red. At the bottom, there are dropdown menus for 'Employee' and 'Position'.

*The portallanguage of the supervisor sets the language of a newly created form. The language can be changed via 'Personalize'.*

3. You will now see the following screen with the administrative details required for completing the P&D form:

The screenshot shows the 'Administrative Data' section with options for 'Fill in form' (selected) and 'Preparation by employee'. Below are fields for 'Supervisor' (Dhr T. Ester), 'Employee: \*' (with a square box circled in red), 'Assessing authority: \*', 'Date of P&D interview: \*', and 'Start evaluation period: \*'.

4. Click on the square box on the right next to the Employee field. A pop-up screen will appear where you can select the employee for whom you want to make a P&D-form. \*
5. Select the assessing authority in the same way as you select the employee. If there is only one possible assessing authority, it will be suggested automatically. \*
6. The date of the P&D interview and the startdate of the evaluation period must be entered in the screen with administrative details. You can change these dates later, if necessary, in the form.
7. Once the administrative details are entered, you should choose one of the following options on the left-hand-side of the screen:
  - 'Fill in form': Proceed with step 9.
  - 'Preparation by employee': The form is sent to the employee; he or she writes a report of the P&D interview and then sends it back to you for further processing. Once you have checked that the report is correct and complete, you may proceed with step 13.

\* *If you cannot select the correct employee or assessing authority, please contact your P&O department.*

### Fill in form

8. In the newly created P&D form, you can choose between a initial interview (if you only need to make agreements) and a Performance and Development interview (if in addition to agreements, you also have to make an assessment).  
If you choose for a initial interview, steps 9, 10 and 11 no longer apply.

9. If you scroll down you will see questions regarding the annual report (for scale 8 or higher) and the teaching evaluation (only for academic staff). If you do not include these, you have to specify your reasons for not doing so. You need to click on the attachments-button on top of the screen to add an attachment.

The screenshot shows the 'P&D interview' section with a 'Performance and Development Inter' header. Below it, there are buttons for 'Save' and 'Attachments (0)', with the latter circled in red. A question 'How would you like to continue?' is visible with a 'Save and exit' option.

10. Under *Section: Assessment* the previously made agreements can be assessed. Agreements from the previous digital report are automatically carried over to the assessment section of the new form. By clicking on <New Topic> you can manually enter agreements you wish to assess.

Performance area/Duty and agreement	Assessment in words	Score (1-5)
Performance area (subject)	Assessment in words	Score
Agreement		
New topic		

None of these fields are compulsory.

Only topics that you have created using the <New topic> button, can be deleted.

11. You have to fill in the *Overall appraisal*-score.
12. Under *Section: Agreements* enter the agreements you wish to make for the coming period. By clicking < Copy agreements > agreements from the previous digital are carried over. For the academic staff, for some faculties the category result areas is set as a default. Completion of the result agreements field is compulsory. If the result area does not apply, you have to delete it by clicking on the rubbish bin. None of the fields in this section are compulsory.
13. You can now complete the components *other topics* and *remarks and reactions*, although these are not compulsory. A remark can also be deleted at a later point in the process.
14. Once you have completed the form, the following options are available on the left-hand side of the screen:
  - 'Save and exit'. Your form will be saved, but not sent. You can retrieve the form at a later time via the status overview.
  - 'For approval employee'. The form will be saved and sent to the employee. Click on <OK>. The screen will close, unless some details are missing. If the latter is the case, an error message will appear at the top of the screen. In this case, edit the form accordingly.

### Approval

15. Once the employee has approved the contents of the form or formulated some remarks regarding the contents, the form will be sent back to you so you can initial or edit it.  
*When the form is waiting for approval by the supervisor it is also accessible via the worklist.*