

USER MANUAL DIGITAL P&D-FORM (EMPLOYEE)

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 *Employee*; this will open a status overview.
2. In this status overview you will find your digital P&D reports. These may be already completed or in progress. The status and substatus of a report determine what you can or are expected to do:
 - 'In planning' in combination with 'Prepare P&D form by employee': your supervisor expects you to prepare the report of the P&D interview.
 - 'In progress' in combination with 'For approval employee': your supervisor has completed the form and is waiting for your approval.
 - In all other cases, you can consult the report, but you are not expected to do anything. The only exception is when you have prepared the form and your supervisor is filling in the form, in that case you are unable to consult the report, until your supervisor has completed the form.
3. You can open a report by clicking on the *Performance and Development Interview* link.



The portallanguage of the supervisor sets the language of a newly created form.

Form with substatus: prepare P&D form by employee

4. In the 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). It is possible to change the date of the P&D-interview and the start date of the evaluation period.
If you choose for a initial interview, steps 5, 6 and 7 no longer apply.
5. 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.



6. 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		
<input type="button" value="New topic"/>		

None of these fields are compulsory.

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

7. You are not bound to fill in an *Overall appraisal*-score.
8. 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.
9. 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.
10. 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.
 - 'Send form to supervisor'. The form will be sent to the supervisor for further processing. Until the survivor has completed the form, you are unable to consult the report. 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.
11. Once the supervisor has checked that the report is correct and complete, the form will be sent back to you for approval.

Form with substatus: for approval employee

12. You manager has sent a report with substatus 'For approval employee' to you to review. You can make additional comments in the last part of the form 'Remarks and responses'. After opening the report there are three options (left side of the screen) for completing the form:
 - Signed for approval: You agree with the report
 - Requesting a modification: You wish to modify certain items of the report
 - Initialled: You do not agree with the contents of the reportOnce you have selected one of the options, click on <OK> and the report will be sent to your supervisor for further processing.

A form with substatus 'For approval employee' can also be accessed via the worklist.