

Online NDM PDR supported by Simitive Reviewee User Guide

Logging on

- Follow this link to the system ndmpdr.simitive.com
- Log in using your University SSO

Home page - Me tab

This acts as the system home page.

The screenshot displays the user interface for Sarah Reviewee. At the top, there is a navigation bar with 'Me', 'My Linked People', and 'Actions' tabs. Below this, the user's profile is shown with fields for Name, Job roles, and Test Job Role. The 'My Reviews' section contains a table with the following data:

Review Title	Completion Deadline	Reviewers	Status	Next Step
PDR (UNT) Form	-	Sarah Reviewee	Not Started	Start review

The 'My Notes' section is currently empty, showing 'You have no notes'. A red arrow points to the 'PDR (UNT) Form' link in the 'My Reviews' table.

- You will see a box labelled 'My reviews' with your current review form/s.
- Select your form and your PDR will open.

Additional tips...

- Don't forget to set your meeting date with your reviewer off-system, via Teams or Outlook etc.
- In future, previous forms can be navigated by 'View Previous Reviews' or 'Hide Previous Reviews'.
- From the home page, you can add notes to supplement any section of your PDR form, select 'My Notes'. E.g. to record additional one-to-one meetings or feedback throughout the year. You can also upload documents such as your job description, training records etc. These can be shared with your reviewer.
- The PDR form is allocated based on your job role (Academic/Research or Professional/support) If you think the incorrect form has been allocated please contact learning.development@ndm.ox.ac.uk

Your PDR form – Header page

At the top of the page is your review header with information including who your reviewer is and whether you have shared your form with your reviewer.

Me My Linked People 1 Action Review Reports

Sarah Reviewee's Review: PDR (Support/Technical/Professional Managerial)

Sign off open from: - Completion deadline: - Status: Not Started

Reviewers

1. Sarah Reviewer

Reviewer History

Share You have not yet shared this review. After answering one question, a button will appear allowing you to share answers with other participants.

Close Your changes won't be shared when leaving the review.

Options, Attachments, & Printable PDF

Why can't I sign off yet?

- Your reviewer should be listed under the reviewer's section. If the incorrect person is listed as your reviewer, please contact learning.development@ndm.ox.ac.uk

Additional tips...

- You can generate a PDF of the form or add attachments (e.g. job descriptions) using the labelled buttons.
- The "Why can't I sign off yet?" button is useful once you have completed all the steps as it will highlight any outstanding actions.

Your PDR form

Beneath the header, you will find your PDR form which is made up of 3 tabs – Introduction, Looking Back, & Looking Forward.

Introduction Looking Back Looking Forward

As you work your way through the form, your answers will be automatically saved. The relevant sections to you will be labelled 'Reviewee to complete'.

Introduction Tab

- Explains the PDR process flow and provides some useful links.




Looking Back Tab

- Complete at least a week prior to your PDR meeting. The sections for you will say 'Reviewee to complete'. If this is your first time using the system, fields such as objectives and training will be blank. However, in future years, this will be pre-populated with the previous year's answers and comments.

Objective set at previous PDR meeting	Was it achieved?
Reviewee to complete  0 words	Reviewee to complete 

Looking Forward Tab

- Move onto the 'Looking Forward' section by clicking 'next page' at the bottom of the page. Or you can click on the relevant tab.
- Questions 1 -3 are to be answered by your reviewer. Questions 4 – 6 are for you to complete. You may want to complete them now or you may want to wait for your meeting.
- **Once you have completed the Reviewee sections on the form**, click the share button. Your reviewer will be notified that you have completed your sections of the form (see additional tips below).

<p> Share</p> <p>You have not yet shared this review.</p> <p>You have unshared changes to your review. Only you can see the changes until you share again.</p> <p> Share</p>	<p> Close</p> <p>Your changes won't be shared when leaving the review.</p> <p>Close</p>
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- During the PDR meeting your reviewer will complete their sections. The form will be used to frame your discussion during your PDR meeting.

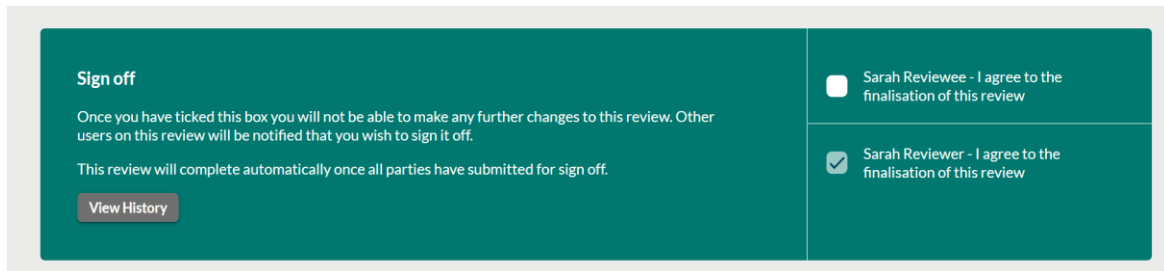
Additional tips...

- Answers are saved automatically as you complete the form and you can close and come back to it but you will need to "Share" your form to allow your reviewer to see your answers and edits.
- Your reviewer will be notified that you have shared your form by an automated 'Alert' email that will be sent **at 8am the following day**. If you wish your reviewer to access your form prior to that or indeed at any time just communicate with them off system and ask them to log in to review.
- Shared changes on the form will be highlighted with a '!' next to the question

- You should complete all tabs (**Looking Back & Looking Forward**) at least one week ahead of scheduled PDR meeting. Note: Future objectives and training needs are draft at this stage as they will be finalised on discussion with your reviewer.

Sign Off

- Once the PDR is complete **this green sign off box will appear**, both the reviewee and reviewer need to tick to say they are happy to sign off the PDR.



Sign off

Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to sign it off.

This review will complete automatically once all parties have submitted for sign off.

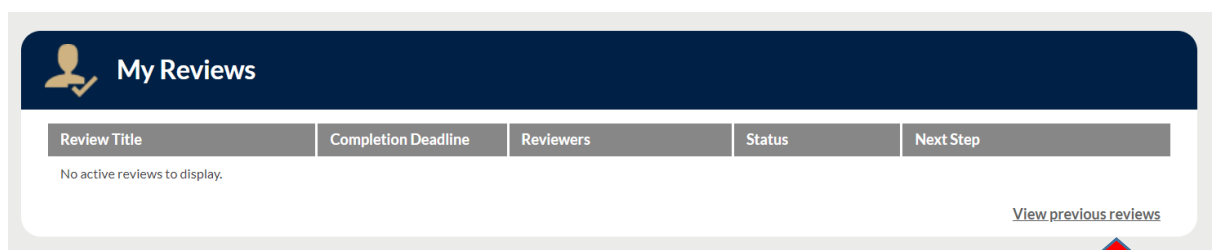
[View History](#)

Sarah Reviewee - I agree to the finalisation of this review

Sarah Reviewer - I agree to the finalisation of this review

Additional tips...

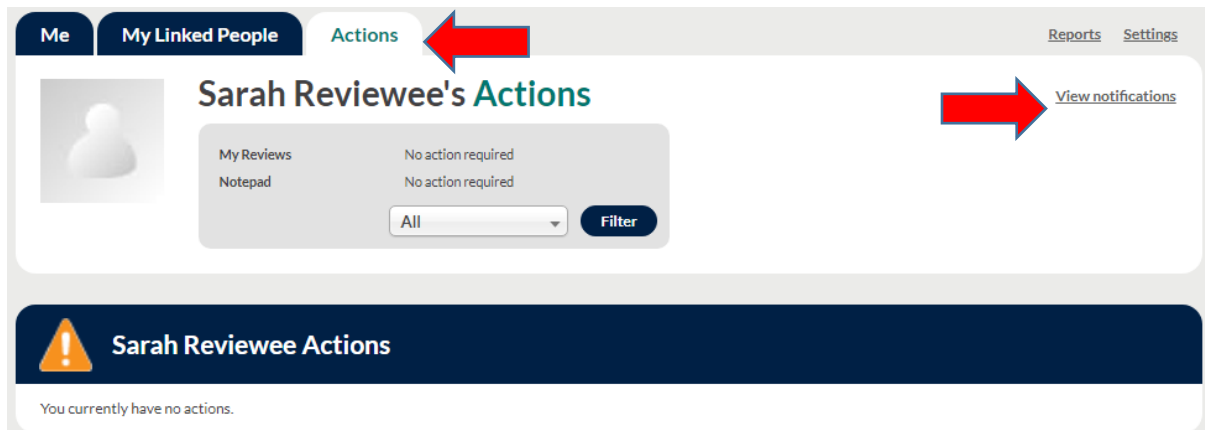
- You should not sign off your form until after your PDR meeting and any subsequent discussions you might have with your reviewer.
- Once your form is signed off, no further amendments can be made.
- If the sign off box does not pop up, there will be a button which says “Why can’t I sign off yet?” and this will tell you what you need to do to complete the process.
- Once your PDR has been signed off, you will be able to view it from the “Me” page to keep track of your objectives and training plans but you will no longer be able to edit it. To find your form, select the ‘View previous reviews’ in the “My Reviews” box.



My Reviews

Review Title	Completion Deadline	Reviewers	Status	Next Step
No active reviews to display.				

[View previous reviews](#)



Me My Linked People Actions Reports Settings

Sarah Reviewee's Actions

View notifications

My Reviews	No action required
Notepad	No action required

All Filter

Sarah Reviewee Actions

You currently have no actions.

Actions

- These are items that require you to action something e.g approve form changes
- They must be actioned before the PDR process can progress
- You can approve, decline or see more details within the actions page
- You will receive an automated email alert summarizing new and outstanding actions

Notifications

- These are items that don't require any direct action but may impact on what you are doing
- Click on "View Notifications" to see these.

Alerts

- An alert is an email containing a list of your new/outstanding actions and notifications
- You will receive a maximum of one email a day regardless of how many actions or notifications you have.