

# Online NDM PDR supported by Simitive

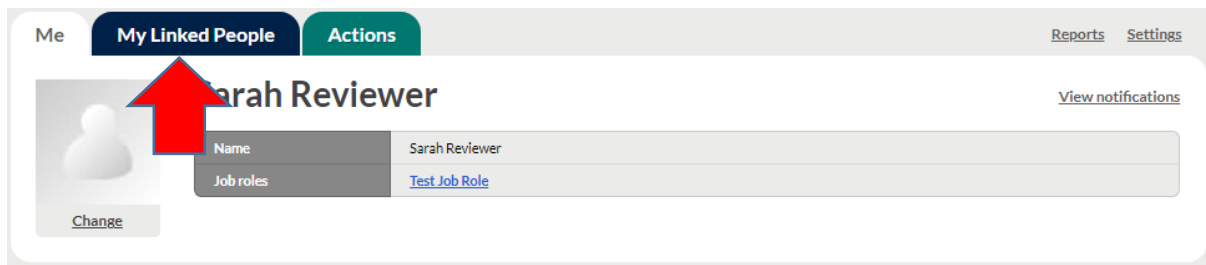
## Reviewer User Guide

### Logging on

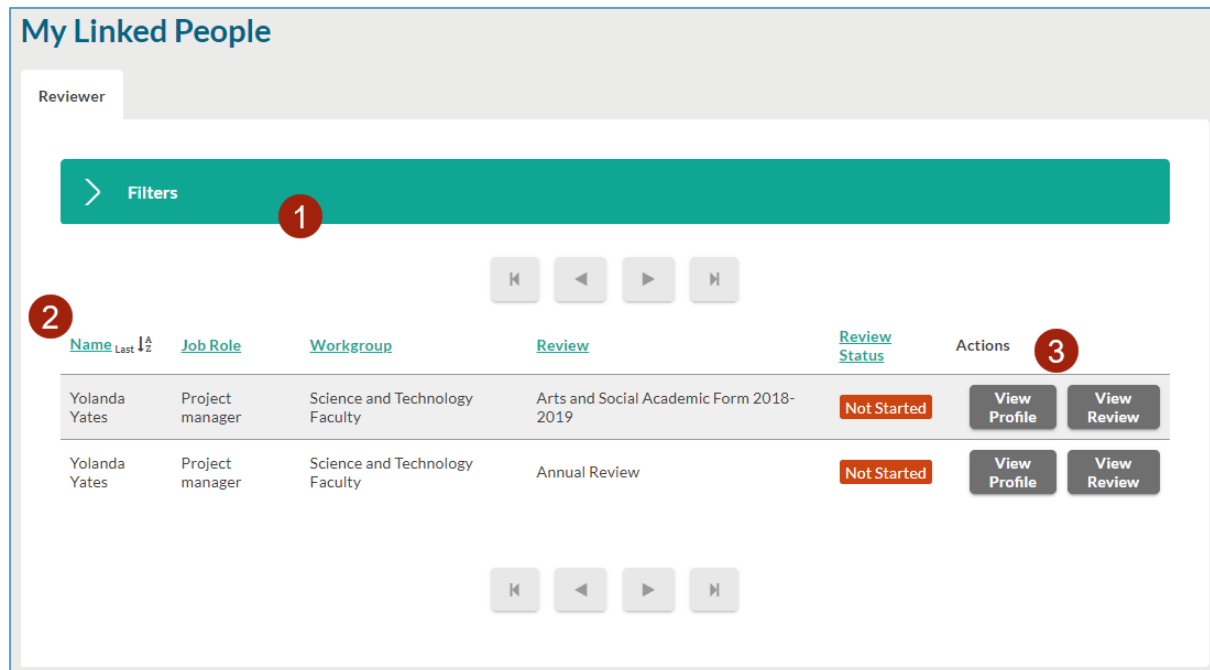
- The URL to connect to online PDR system is [ndmpdr.simitive.com](https://ndmpdr.simitive.com)
- Log in using your University SSO.

### My Linked People page

- Go to “My Linked People” to see a list of all your reviewees. If anyone is missing, please email [learning.development@ndm.ox.ac.uk](mailto:learning.development@ndm.ox.ac.uk)



- The My Linked People tab shows:
  - 1) Filters section to enable you to find a particular person more easily.
  - 2) List of all review forms on which you are listed as a reviewer
  - 3) Links to review their profile (their “Me” tab) and review form.



- You will receive an email alert once a review has been shared with you. Click “View Review” to open your reviewee’s PDR form. You can also navigate to the form via the ‘Actions tab’.

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### PDR form – Header page

At the top of the page is the review header with information including reviewer details and whether the form has been shared.

- You will be listed in the “Reviewer” box
- You can generate a PDF of the form or add attachments (e.g. job descriptions) using the labelled buttons.
- Under “Options”, the “Mandatory Fields” button will highlight the mandatory fields within the form.
- The “Share” box enables you to share answers and changes with your reviewee. Your reviewee will not see your comments unless you click “Share”.

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

Sign off open from: -      Completion deadline: -      Status: Completed

✓ **Reviewers**  
1. Sarah Reviewer

✓ **Share**  
This review has been shared and completed.

✓ **Close**  
This review has been completed.

> Options, Attachments, & Printable PDF

### PDR Form

- Beneath the header, you will find your reviewee’s PDR form which is made up of 3 tabs – Introduction, Looking Back and Looking Forward.

Introduction    Looking Back    Looking Forward

- Review your reviewee’s answers by clicking on each tab.
- Complete the reviewer sections and share with reviewee in advance of PDR or Close to save and discuss at the meeting

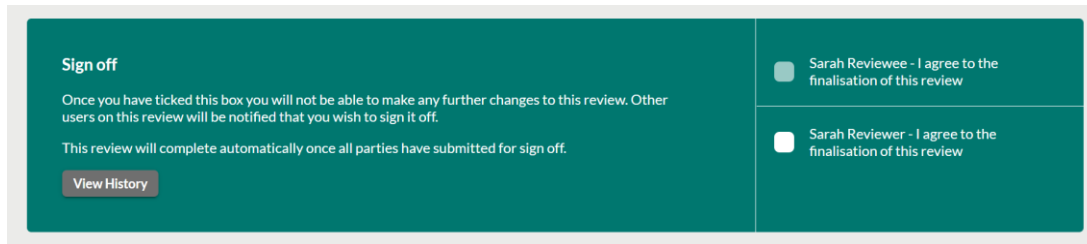
Comments:

Reviewer(s) to complete

- Hold the PDR meeting with your reviewee using the whole form as a basis for your discussion.

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- Following the PDR share your comments with your reviewee using the share button in the form header.
- Once all answers have been shared and both parties are satisfied the PDR is complete you must sign off the PDR.
- A green “sign off” box will appear underneath the form header. Both you and your reviewee need to tick the boxes on your own accounts to finalise the form. This is important as this is the final completion of the form. **Once this sign off is complete no further amendments can be made to this PDR**



### Additional tips...

- Your answers are saved automatically as you complete the form but you will need to continue to “Share” the form to allow your reviewee to see your answers and edits.
- 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 in order to complete the process.
- Once the PDR has been signed off, you will be able to view it from the “My Linked People” page but you will no longer be able to edit it.

### Actions, Notifications and Alerts



### 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 summarising new and outstanding actions

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### Notifications

- These are items that don't require any direct action but may impact on what you are doing
- Click on "View Notifications" for more details

### 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

### Reports

As a reviewer you are able to run reports to monitor the status of your reviewee(s) PDRs.

The PDR form can move through the different system stages several times before the process is complete and the form agreed and finalised. The system stages can be summarised as follows.

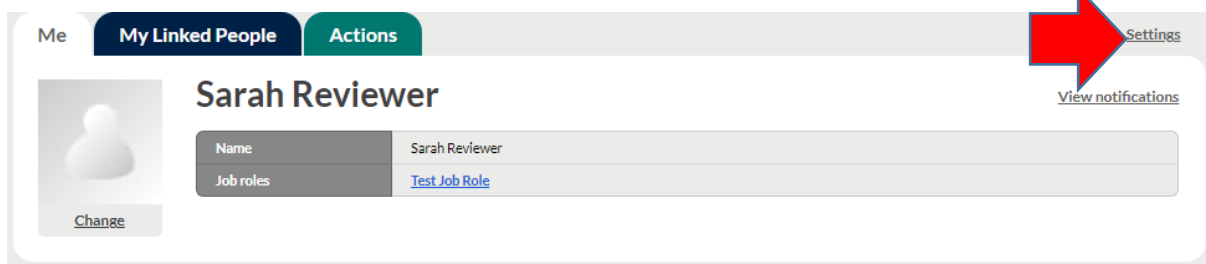
Not Started	No information has been added by the reviewee or reviewer
Started	Some information has been entered by either the reviewer or reviewee
Shared	Some information has been entered by the reviewer or reviewee and is with the other party for approval or acknowledgement
Completed	The form has been finalised by reviewer and reviewee

A linear lifecycle would be: Not started > started > shared > completed

A more representative lifecycle would be: Not started > started > shared > shared > shared > shared > completed

### Viewing reports

Go to 'Me' page and click on the reports link



Me My Linked People Actions Settings

Sarah Reviewer

View notifications

Name Sarah Reviewer

Job roles Test Job Role

Change

Click on review Usage reports



Review Reports

Usage

Review Usage Report