User Manual - PDP Discussion Dashboard

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What is a Personal Development Plan Discussion Dashboard?

The PDP Discussion Dashboard allows the PDP 1st approver or 2nd approver (PDP Practitioner) to initiate a PDP Discussion for the employees for whom they are the first approver. The dashboard displays the progress of the discussions with your employees. All of the information necessary for a PDP discussion is located in one convenient central location.

There are 6 steps in the PDP Discussion process. use the tabs to guide you to complete the process in a logical way. You can however navigate between these tabs in any order you wish. The results of the discussion will be saved and generated into a specific report.

What is the purpose of the process?

The PDP Discussion provides the opportunity for an employee and their PDP 1st and 2nd approvers to discuss their training requirements.

1. These requirements aim to help the employee to be successful in their current job and to grow within the role. This means that the discussion facilitates and starts the process of closing existing skills gaps that an employee currently has.
2. The PDP Discussion will also identify performance-related training that has been identified through the Performance Appraisal process. This training is compulsory and must address performance-related issues where a lack of skills is hampering desired performance levels.
3. Lastly, the discussion helps to identify training required for the employee's current role and gives sight to an employee of their career path possibilities.

When will these discussions take place?

1. PDP discussions are held within the financial period of the business. This means that it now has a specific start date and end date that fall in a closed period. This closed period runs concurrently to the financial year of the business.
2. PDP 1st and 2nd approvers will thus within this period have the opportunity to conduct at least one but a maximum of three discussions with their respective employees.

Note: Only PDP 1st and 2nd approvers have access to the PDP Discussions.

Process/data flow diagram

The following process/data flow diagram highlights all system components supporting the PDP discussion and its usage.



Process of completing a PDP discussion

The full process can be described as:

1. Start the Personal Development Plan discussion.
2. Discuss the PDP with the employee while updating and completing the fields necessary.
3. Finalise the discussion and print the specific report.
4. Sign the document by both parties and upload the document to the finalised discussion.

We will follow these steps to create a new PDP discussion for an employee. We will demonstrate the PDP 1st approver perspective on the process.

Working with the PDP Discussion: PDP 1st Approver

In the previous article we have learned what a PDP Discussion Dashboard is, as well as the steps to follow in the PDP Discussion.

In this article we will learn how to work with a PDP Discussion.

The PDP Discussion dashboard allows the PDP first approver or second approver (PDP Practitioner) to initiate a PDP Discussion for the employees who are included in the process and for whom they are the 1st approver. The PDP will then be exported in a specified format.

This module will be discussed from the PDP 1st Approver's perspective.

How did I get here?

- *From the portal, click - My PDP*
- *Then select the PDP Discussion tab*

What can I expect in this section?

- How to use the PDP Discussion Dashboard.
- Were does all the information come from.
- How to complete and finalise a PDP Discussion.

What configuration and Master library Data should be in place?

- All the master data components listed in the PDP Discussion Administration section in this manual.

Accessing the PDP Discussion Dashboard as a Manager

Login to the Signify HR system. From the Home page navigate to the **My PDP** link in the side bar menu to access the PDP module.



After you have accessed the PDP module you are now able to select the **PDP Discussions** tab. This is you PDP Discussion Dashboard.



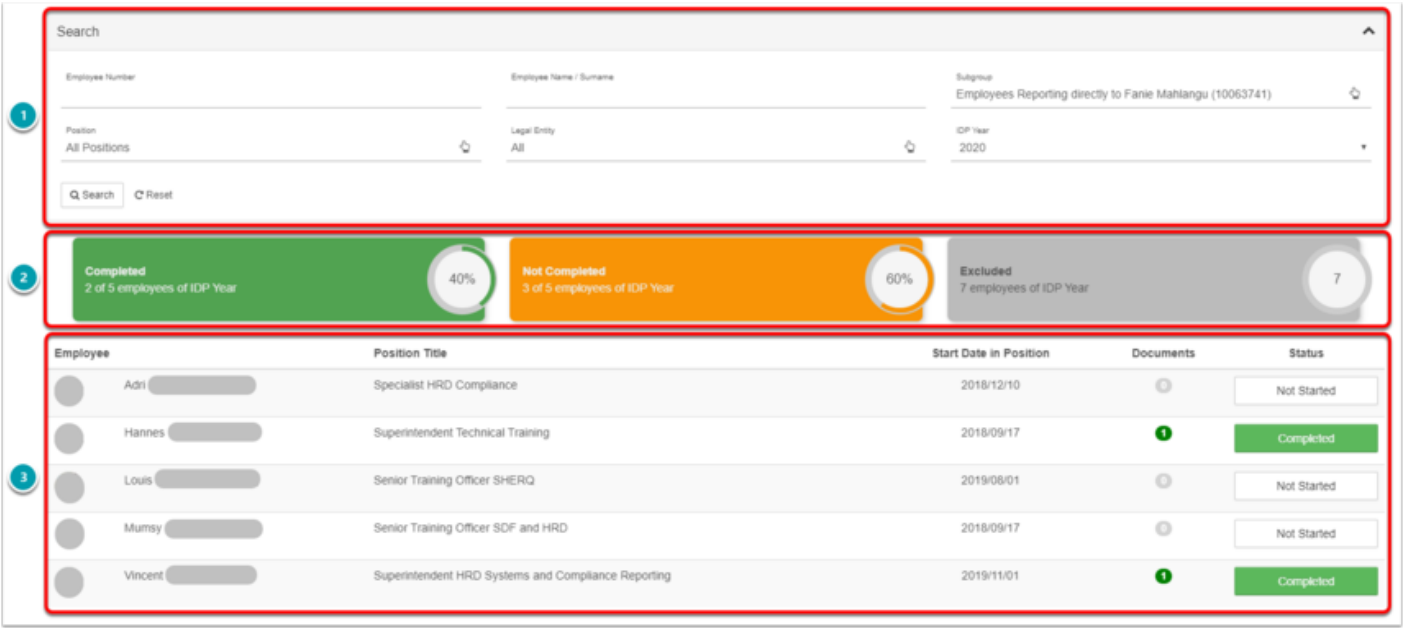
PDP Discussion Dashboard Overview

In this section we will discuss what is displayed on the PDP Discussion Dashboard page and it's functionality.

The manager's PDP Discussion Dashboard consists of three sections:

1. Search options.
2. Progress Dials.
3. Employee information.

Each of these sections will be discussed in more detail below.



Search Options

The PDP Discussion Dashboard offers an extended search functionality that will make it easier to locate employees:

- Employee Number
- Name or Surname
- Subgroup
- Position
- Legal Entity/Company
- PDP Year



Progress Dials

The progress dials display the progress of the PDP Discussions per category of employees who are included in the PDP Discussion process.

Note: The progress dials indicator percentage exclude the number of employees who are excluded from the PDP Discussion process.

These interactive progress dials can be selected to include or exclude completed, not completed or excluded employee in employee information listed below. By default only the Complete and Not Completed employees are selected.

To include or exclude any of the three categories, simply click on the relevant dial and the employees will be included or excluded in the employee information list. The category that is excluded will be grayed out like the example below.



The progress dials categories and the employees the include are explained below:

Completed:

This is the number of employees that have an approved PDP Discussion.

Not Completed:

Employees listed here have discussions that have not been started and include discussions that are in progress.

Excluded:

These employees have been excluded from the PDP Discussion process. Reasons why an employee is excluded from the PDP Discussions include:

- Employees that are not appointed in an included appointment category.
- Employees that have not concluded their probation period.

> Note: Exclusions are controlled with settings. Depending on the company requirements Contingent workers may or may not be included in the PDP Discussion process.

> Tip: The probation period is calculated from the start date in position of the employee. The start date in position is displayed in the employee information list. When the employees is in the probation period they will not be eligible for a PDP Discussion.

The probation period can be set to the client requirements in system administration settings.

Tip: The exclusion reason can be seen when hovering over the Excluded status.



Employee Information

The list of employees are displayed and is dependent on the information selected in the search criteria and the progress dials selected or excluded.

The following information is displayed per employee:

1. Employee photo.
2. Employee Name, Surname and Employee number.
3. Position Title.
4. Start Date in Position.
5. Documents.

6. PDP Discussion Status.



> Note: An employees 'Known As' name is displayed in this list when it is entered in the employees details.

Tip: To get quick access to the documents in the PDP Discussion click on documents number icon in the employee information.



PDP Discussion Status:

a PDP Discussion has the following statuses:

- Not Started.
- In Progress.
- Completed.
- Excluded.

Tip: When a discussion is accessed the status moves from Not Started to In Progress. The status will only change to Completed when the discussion is approved.

Click on the discussion status to open the PDP Discussion for that employee. We will discuss the PDP Discussion in the net section.



PDP Discussion Overview

In this section we will discuss the process of a PDP Discussion, where the information comes from in each section and how to finalise the PDP discussion.

What you see when you open a PDP Discussion for the first time:

1. The name of the employee will be displayed at the top of the screen.
2. The PDP discussion is divided into sections that needs to be completed by the PDP 1st approver.

3. A progress bar is displayed that indicates the progress of the discussion.
4. The 'Back to List' button takes you back to the discussion dashboard.
5. The 'Approve' button indicates the completion and final approval of the entire process. This button will only become active once all the sections have been completed and approved.
6. The 'Print' button will become active once you have approved the discussion.

The PDP Discussion sections can be completed in any order.



Tip: Only sections where confirmation is required will update the progress of the progress bar.

> Note: The sections displayed in the PDP Discussion can be switched on or off and are customisable by a system administrator.

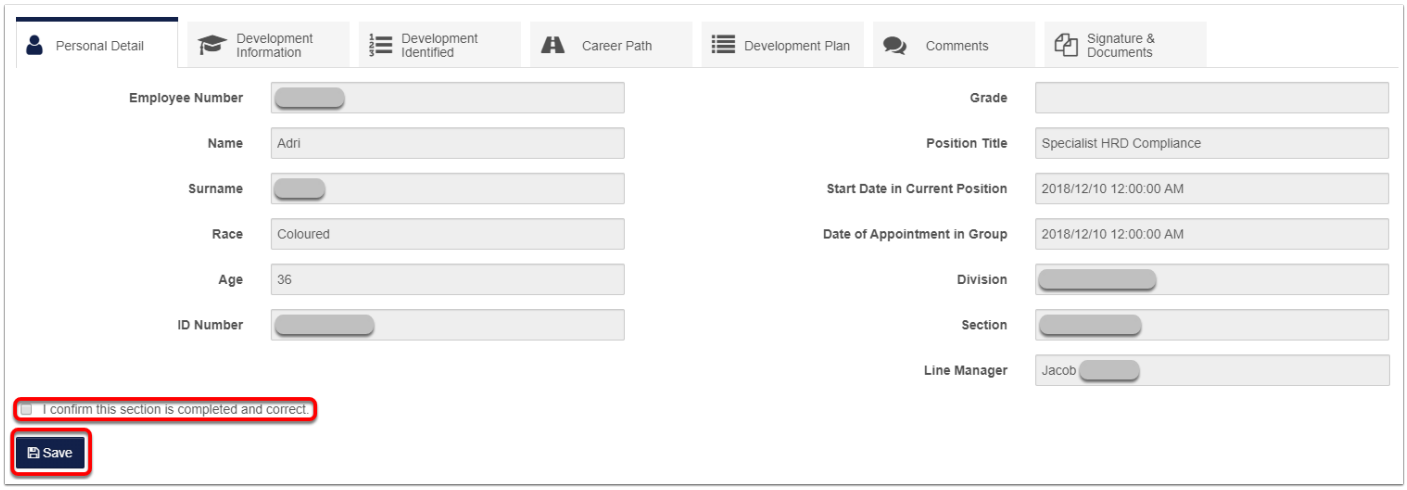
Each section in the PDP Discussion will be discussed separately in the sections below.

Personal Detail

The information in this section displays the employee's personal information derived from the "manage employees" database.

The information is not editable the only action required from the PDP 1st approver is to verify and confirm that the information is correct and save.

Tip: If any detail on this screen requires amendment, please send a request to HR to make the necessary changes. For more information on where this data comes from refer to the PDP Discussion Administration manual.



Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Development Information

In this section the following information is displayed that is related to the employees job title:

- Essential Skills
- Qualifications Required
- Qualifications Achieved

The action required from the manager is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

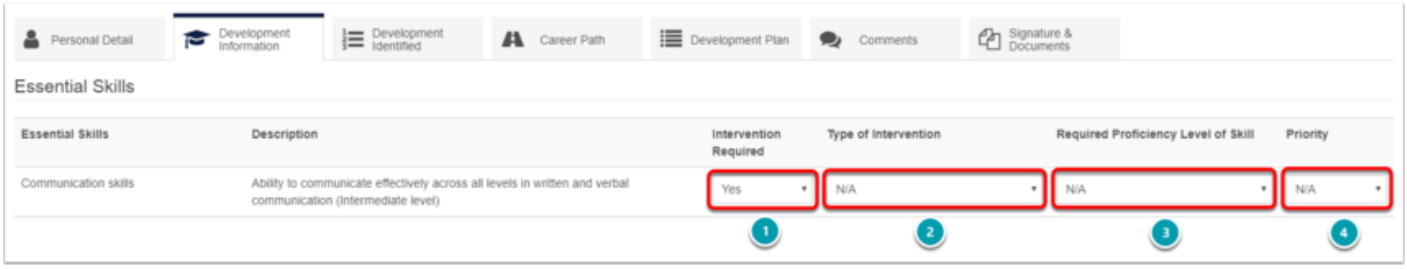
Essential Skills

These skills are extracted directly from the job profile. This means you cannot add any essential skills to the list. Here you can indicate;

1. Whether a training intervention is required,
2. the type of intervention that is required,
3. the proficiency level at which training should be aimed and,
4. the priority level that the training should have.

Select the applicable option from the drop down menu menu items.

Tip: The Essential Skills and Description are auto populated from the Job Profile Module of the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.



> Note: When the Intervention Required is set to 'N/A' or 'No' the fields 'Type of Intervention', 'Required Proficiency Level of Skill' and 'Priority' will be grayed out.



Qualifications Required

The action required from the manager is to confirm that this information is correct.

Tip: The Qualifications Required are auto populated from the Job Profile Module of the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.



Qualifications Achieved

The action required from the manager is to confirm that this information is correct.

Tip: The Qualifications Achieved are auto populated from the employees Learner Records. For more information on where this data comes from refer to the PDP Discussion Administration manual.

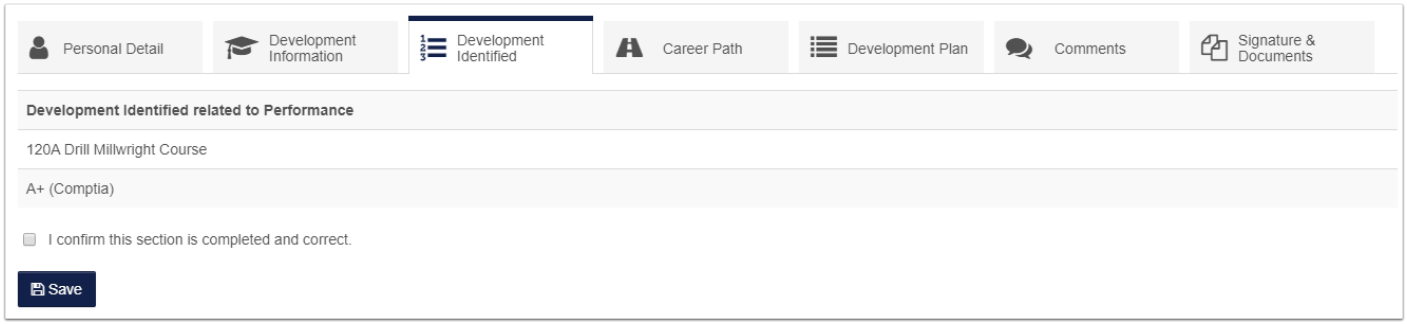


Development Identified

The information in this section identifies training linker to the 'Performance Contract Development Plan'. The training requirements listed here were identified during the performance appraisal process. The purpose of this information is to help you to facilitate the discussion to create a bigger picture of the employee's Development Plan.

The action required from the manager is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Tip: This data can not be edited. The Development Identified Related to Performance is auto populated from the Job Profile Module in the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.



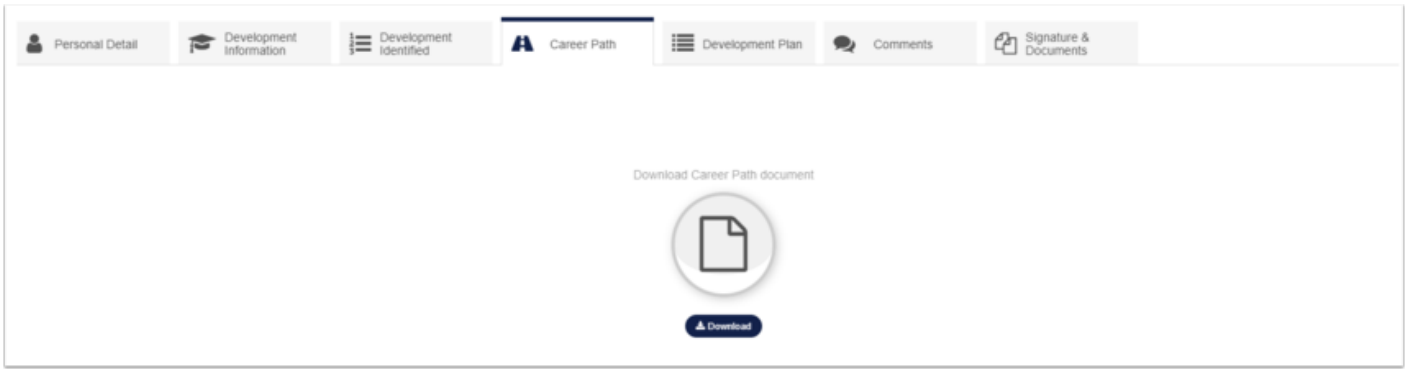
Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Career Path

In this section you will be able to download the career path document pertaining to the specific function an role of the employee. Use the information in this document to facilitate your discussion with the employee.

The action required from the manager is to download the document and discuss its content with the employee.

Tip: This document is only available per specific organisational level and can be configured by a system administrator. For more information on where this data comes from refer to the PDP Discussion Administration manual.



> Note: When a new career path document is uploaded by an administrator the old career path document will not be available when accessing historic career path.

> Information: This step in the discussion does not contribute to the PDP discussion progress bar.



Development Plan

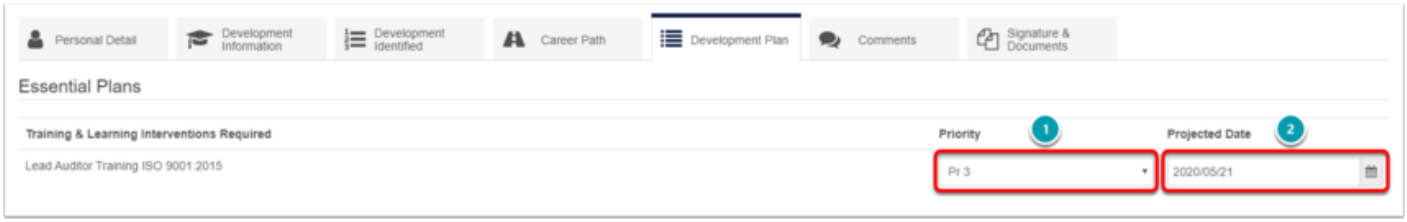
This section will list all other the training interventions linked to the employees job profile that is not related to performance.

The actions required by the manager are to confirm the training interventions and the set following for each training intervention:

1. Priority.
2. Projected date, this date indicates when the employee is expected to complete the training. The projected date can also fall within the next PDP period if the discussion is done late in the year.

PDP 1st approver is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Tip: The Essential Plans are auto populated from the Job Profile Module in the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.



> Information: If essential training expires during the PDP period, the training intervention will be listed here. It will be grayed out and indicate an expiry date.

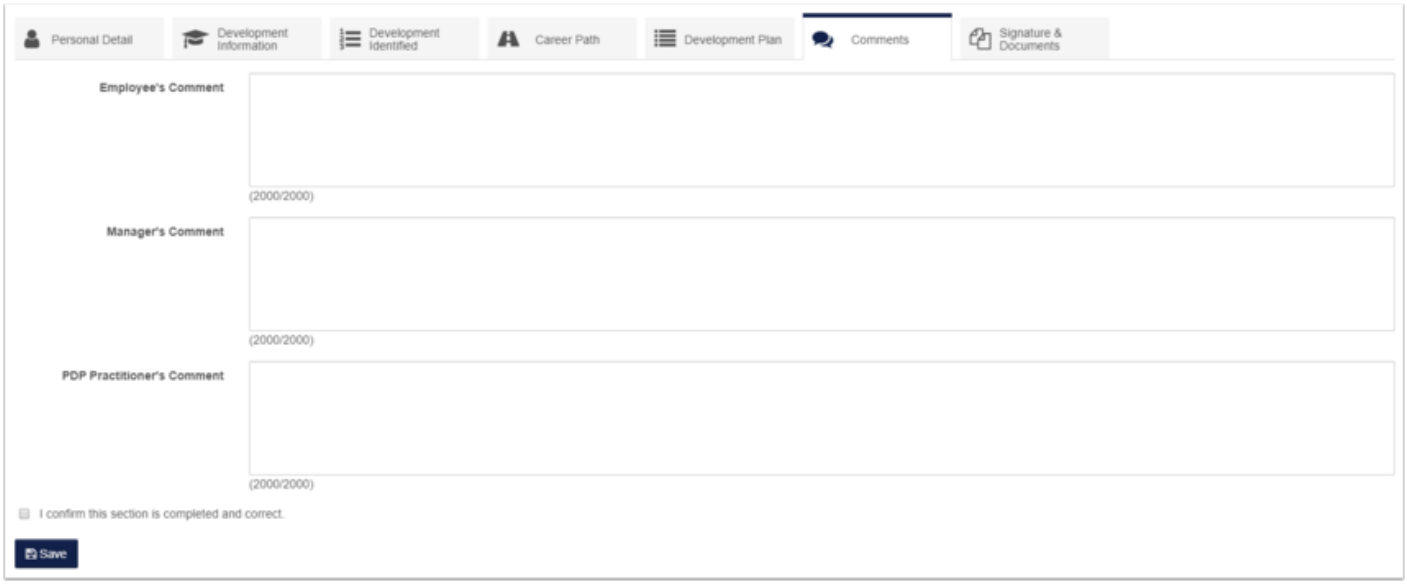


Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Comments

In this section of the PDP Discussion the employee, manager and PDP practitioner has the opportunity to capture their comments.

Actions of the PDP 1st or 2nd approver is to capture the comments and to select the Check box 'I confirm this section is completed and correct' and save this section.



> Note: Comments for the PFP 1st, 2nd approvers and employee are not mandatory. There is however one exception: when a projected date for essential training falls outside of the current PDP period it is mandatory for the PDP 1st approver to motivate why the projected date falls within the next PDP period.

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Finalising the PDP Discussion

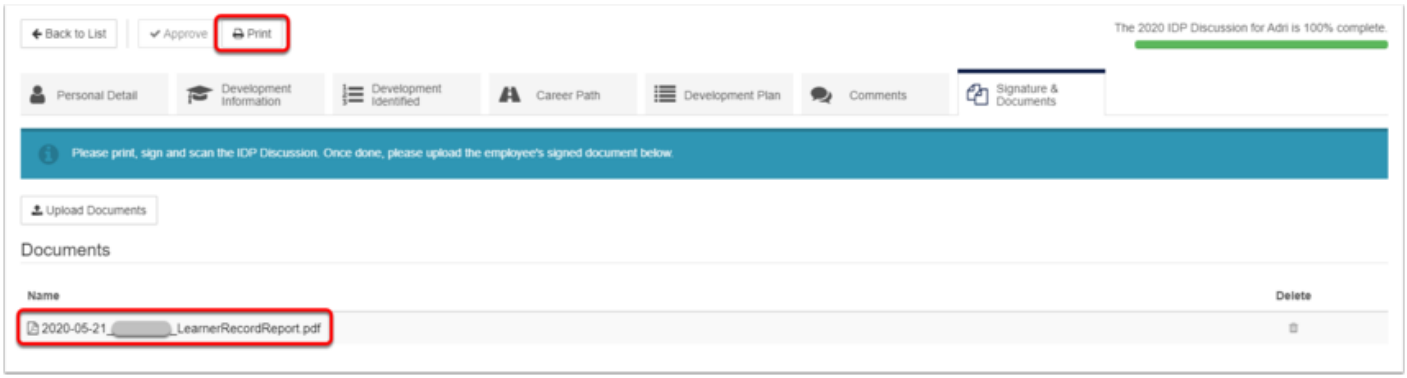
When you have completed all the sections in the PDP Discussion and the progress indicator indicated 100% you will be able to Approve and complete the PDP Discussion.



> Note: Once the PDP Discussion has been approved you will not be able to unapprove the discussion or edit any detail on the discussion.

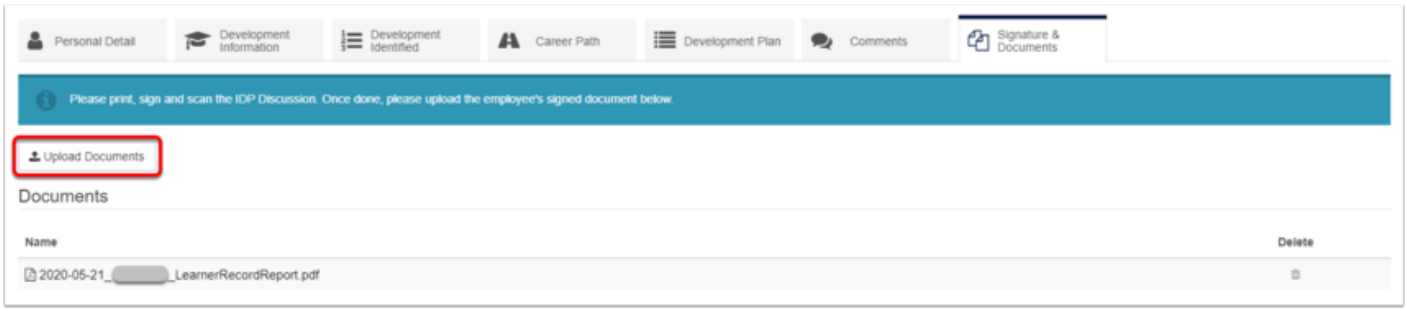
> Information: It is essential that you first review all the information on all the tabs before clicking the 'Approve' button. Remember once you click the 'Approve' button the discussion is locked for editing and no changed can be made.

Once the PDP Discussion is approved you will notice a Learner Record Report is automatically created and is available for download in this tab. The report is a summary of the training that the employee has completed in the past.



The last steps will be to select the Print button to print the PDP Discussion. This document must be signed by the relevant parties and scanned to a computer.

The signed and scanned document must then be uploaded to the employees discussion's last section 'Signature & Documents'. To do this select the Upload Documents button in the last section.



Congratulations you have successfully completed a PDP discussion.

Working with the PDP Discussion: Employee View

What is the purpose of the process?

The PDP discussion provides the opportunity for an employee and their Supervisor and/or PDP Practitioner to discuss their training requirements.

- These requirements aim to help the employee to be successful in their current job and to grow within that role. This means that the discussion facilitates and starts the process of closing existing skills gaps that an employee currently has.
- The PDP Discussion will also cover performance-related training that has been identified through the Performance Appraisal process. This training is compulsory and must address performance-related issues where a lack of skills is hampering desired performance levels.
- Lastly, the discussion helps to identify training required for the employees' current role, and gives sight to an employee of their career path possibilities.

When will these discussions take place?

PDP Discussions are held within the financial period of the business. This means that it now has a specific start date and end date that fall in a closed period.

This closed period runs concurrently with the financial year of the business.

The PDP First approver and PDP Practitioner will thus within this period have the opportunity to conduct at least one but a maximum of three discussions with employees.

Who are the role-players involved in the PDP Discussion process?

There are 3 role-players involved in this process, namely:

- The Employee
- The PDP Practitioner
- The PDP First Approver

How do editing rights work in the system-based process?

It is important to note that the Supervisor and PDP Practitioner are the only people who are able to access and edit the PDP Discussion information, once a PDP has been completed and approved it can no longer be edit.

An employee will only have access to the reports generated once a discussion has been approved and the Signed PDP report uploaded.

Process of completing a PDP Discussion

The full process can be described as:

1. Have the PDP Plan Discussion with your PDP 1st Approver and/or PDP Practitioner.
2. Sign the document which will be uploaded to the finalized discussion.
3. You will be able to access this on the PDP discussion section on the My Training Requirements Tab.

How to access the PDP Discussion Plan Reports:

1. Login to the system and select PDP from the list of Portal Menu Items.



2. You will have access to the “My Training Requirements” tab.

3. The tab is divided into 2 sections you will have access to your own training requirements displayed on the first section of this tab.



4. On the PDP Discussion section, you will be able to access the following reports:

1. Learner Record report this is a list of completed formal qualifications, Unit Standards, Programmes, and training.
2. IDP Discussion report this is a summary of the PDP Discussion held with either the PDP Practitioner or PDP 1st Approver. You will only have access to the report once your discussion has been completed and your PDP Practitioner or Approver has upload it.

5. If you are excluded from the PDP Discussion Process or if a discussion has not been finalised a system message will be displayed informing you whether you have been excluded from the process or if a discussion is incomplete.

