

# Accountability and Development Review

Guidance in Completing the Online Form

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### 1 Introduction

Access to your ADR form is through Pegasus. Enter username and password, then click 'administration' tab and choose 'Accountability and Development Review'.

You will be prompted to commence the process by selecting the review year and pressing the 'submit' button.

Sections with an asterisk marked in red require an input before exiting the section.

Please remember to regularly press the 'save' button at the bottom of each section to prevent your work from being lost due to the Pegasus automatic time-out.

### 2 Your role as Reviewee

Before you begin, please check that your details are correct i.e. Reviewee Name, Department/School, Job Title.

The form has six tabbed sections ordered in a suggested sequence for completion. The keys ones are as follows:

Tab	Purpose
<b>Review</b>	Enter a summary of your contribution and achievements over the past review year or from when you started working at the university if this was within the last year. This section should provide an assessment of your performance in the role and a brief commentary on performance against objectives set at the previous review (more detailed progress comments will be made in the Brought Forward Objectives section, as described below).
<b>B/F Objectives</b>	Objectives from the previous review brought forward. You can update them to record progress made. If this is your first review through ADR this section will be empty. You should comment on progress in relation to each of the objectives which were set at the previous ADR review.
<b>Objectives</b>	Enter possible new performance objectives for the coming review year. Each objective should be entered individually. This section is mandatory.
<b>L &amp; D Plan</b>	Your L & D activities from the previous review will be listed. You can update them to record progress made. If this is your first review through ADR this section will be empty. Enter possible Learning and Development requirements for the coming review year.
<b>Comments</b>	Add additional comments that will help in your review that do not fit under the other headings. This section is optional.
<b>Submission</b>	Once all the required areas are complete you can submit your ADR to your reviewer from this section.

## 2.1 For Academic Professional Staff

The Review section has five subsections: Research, Teaching, Knowledge Exchange, Citizenship and Internationalisation. The default setting is to view all sections on one page however if you hover on the "Review" tab heading, a list of the subsections appears. You can select a subsection from the list and edit each subsection individually in turn, if preferred. When completing the Review section summarise your contribution and achievements under the appropriate heading. You must press **Save** before navigating away from each section, otherwise you will lose any information you have entered.

## 2.2 For All Staff

Complete in turn each section remembering to save as you go. Staff should be aware that if they start to complete their ADR form and leave it inactive for more than 30 minutes, Pegasus will "time-out" and any data not saved will be lost.

There is a 7,000 character limit in each section.

When entering Objectives and Learning and Development Activities please add each separately, by clicking the appropriate button **Add Objective** or **Add Activity**. Remember you can reorder these by following the instructions on screen. When entering Objectives you are asked to indicate which Strategic Area(s) the objective will support. You can do so by clicking on the drop down list and selecting from the options available. More than one Strategic Area can be selected for each objective.

Attachments can be uploaded to the ADR record e.g. Pure report by clicking on the **Uploads** option towards the top of the ADR screen. Each attachment file should be clearly named. For Academic Professional Staff it is recommended that a [Pure report \(https://moss.strath.ac.uk/developmentandtraining/resourcecentre/Pages/Pure\\_for\\_Academics/Summary\\_Reports.aspx\)](https://moss.strath.ac.uk/developmentandtraining/resourcecentre/Pages/Pure_for_Academics/Summary_Reports.aspx) is attached to the ADR record as standard to avoid the need to replicate information in the ADR form itself.

## 2.3 Submitting your ADR form

When you have finished your draft ADR you submit it to your reviewer prior to your ADR meeting.

1. Click on **Submission** tab. If you are not clear who your reviewer will be, then please contact your line manager/Head of Department.
2. Select the name of your reviewer by clicking **Select Staff Member** and directly input your reviewer's name (in the format - Surname, Forename), or search using the drop down list. Note: you can select your reviewer before you have finished completing each section, but you will not be allowed to formally submit your review until each required section is complete.
3. Click **Submit to Reviewer**. An email will be automatically sent to your reviewer from the system at this point to inform him/her that you have completed your ADR record form.

Once you have submitted your form to your reviewer, the reviewer is the **controlling user**. This means that you cannot make changes until your reviewer completes his/her comments and submits it back to you.

This procedure is designed to be completely transparent, so any input /changes made by your reviewer will come back to you before the on-line form can be forwarded on for final sign off. An email will advise you when your reviewer has completed his/her comments.

When you have checked the comments (ensuring that you have ticked the box if you want your comments to be viewed by your reviewer) and added any further points that you want to make, resubmit the form to the reviewer by clicking 'Submission'.

If no other changes are made or comments added your reviewer can then submit the review for final 'sign-off'.

A '**work in progress**' option is available that allows changes to be made by the Reviewee and Reviewer at the same time without the requirement to pass the **controlling user** status between the two parties. The '**work in progress**' option is available on the submission tab once the Reviewee has submitted their initial ADR form to the Reviewer. The normal approval process resumes when the Reviewee resubmits their final version to the Reviewer i.e. the **controlling user** status becomes applicable. This process should be followed in order for a final version of the ADR form to be generated for Signatory approval and to allow the transfer of objectives and learning and development plans data for the next ADR review process.

Should you inadvertently choose the wrong reviewer you must contact the person you have chosen and request that they 'reject' your submission. The form will then be returned to your control to select the correct reviewer. Should you still encounter difficulties please contact the HR Operational Support Team at [operationalsupporthr@strath.ac.uk](mailto:operationalsupporthr@strath.ac.uk)

If you wish to view/print your form after you have submitted it to your reviewer you can click on 'View Form'. You will be able to 'read only' and cannot make any changes but you can print off your form. You will have to print any uploads separately.

### 3 Your role as Reviewer

On entering the ADR screen you will be presented with a number of options in the form of 'radio' buttons. These will include 'Reviewee', as you will be a reviewee during some part of the ADR process; 'Reviewer', responsible for reviewing staff. You may also be a 'Signatory' i.e. be required to sign off a number of Reviewee/Reviewer forms.

There is also be a further button which, when pressed, lists the reviews currently awaiting action by you.

Select 'Reviewer' button. This will take you to 'MY Workload' page (at the top you will see your role as Reviewer) where you will see displayed the reviews currently awaiting action.

Click on 'review reference' to access the relevant form.

At the right of the screen there is an option to display all reviews you are responsible for which have been submitted or only those submitted and awaiting action from you.

Be sure to check 'Uploads' - (below the header information) - to establish whether the reviewee has attached documents in support of their review submission. These require to be printed separately from the form.

Following the ADR meeting between yourself and the reviewee you are required to update the form by entering your comments in each of the sections completed by the reviewee (see above). On completion the form is then 'submitted' back to the reviewee to confirm that the form is an accurate reflection of the review discussion.

The process is designed to be transparent in that, if the reviewer makes a change to the form, it must be submitted back to the reviewee for noting/comment and subsequent re-submission back to the reviewer. This process continues until no changes are made. The form can then be submitted to the relevant 'Signatory'.

This is done by entering the date of review meeting and then pressing the 'Submit' button and choosing the 'Signatory' in the same way the reviewee chose the reviewer - by entering surname, initial or by searching on staff list option.

If you as a reviewer wish to access any of the forms after you have submitted to your 'Signatory' you can do this by entering the ADR process as normal, choosing the 'Reviewer' button and clicking on the relevant 'review reference number'. The relevant form will be recalled on a 'read only' basis. Also, you may obtain a history of each stage in the process for that form by clicking 'View History' button.

## 4 Form Fields and Facilities

### 4.1 Field Descriptions

<b>Review ref*</b>	This is a unique number for your review this year. It is automatically generated when you first access the form. This reference can be used by your reviewer to quickly access your form.
<b>Status</b>	This field indicates the stage your form is at in the ADR process e.g. new, forwarded to Reviewer or returned by Reviewer (with changes).
<b>Date of Review Meeting*</b>	This date is picked up from information entered by your Reviewer following your meeting.
<b>User Role*</b>	The role in which you are currently using the system e.g. you may be a Reviewee, Reviewer or Signatory.
<b>Controlling User*</b>	The role which 'controls' the form at each stage and can make entries/changes. Initially this is the Reviewee. When the form is submitted to the Reviewer the 'Controlling User' changes to the Reviewer. If the Reviewer submits the form back to the Reviewee then the 'Controlling User' reverts back to the Reviewee and so on. Finally, when the Reviewer submits to the Signatory, the Controlling User' changes to the Signatory.
<b>Review Year*</b>	Indicates the period of the review record
<b>Reviewee name*</b>	The name of the reviewer is picked up from the submissions tab.

### 4.2 Form Facilities

<b>View History</b>	By clicking on this you are able to view a history of your review process.
<b>Add Notes</b>	This can be used as a notepad, with the facility to make viewing available to others in the process. After opening, hover over '?' for further information.
<b>Uploads</b>	This facility allows you to upload documents in support of your review. Please note documents should be in Word/Excel/PDF format and the maximum size of file is 10MB. Your uploaded document will be appended to your record form.
<b>View Form</b>	This facility allows you/your reviewer to view your submission in a PDF Format and to print your form, if required. Note: you will have to print the form and any downloads separately
<b>Viewable By</b>	This facility allows the reviewee to select another employee to be granted read-only access to their review, including comments from the reviewer and signatory.