

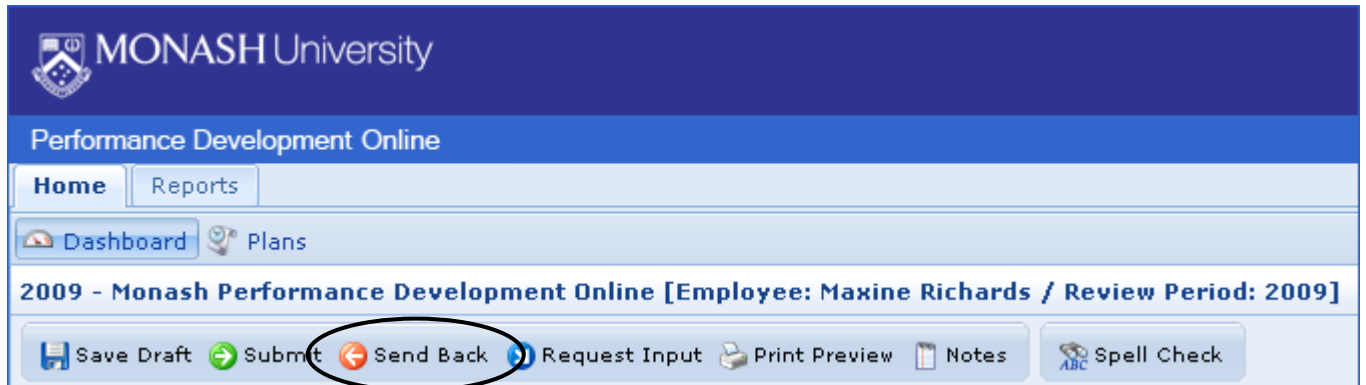
**Send back and request input**

'Send Back' and 'Request Input' comments/history are captured in the 'Send Back & Input History' tab.

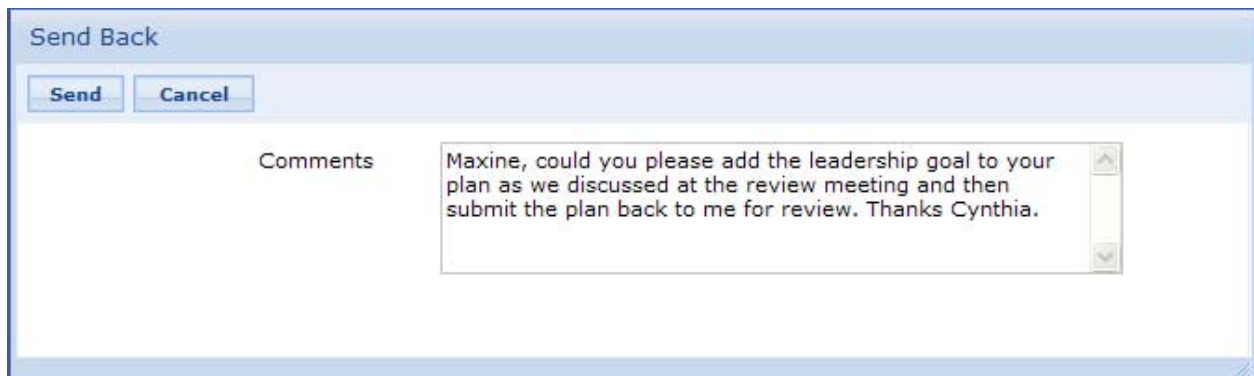
Send Back

The PDO 'Send Back' function enables the step owner to send the plan back to the previous step in the process. If at step 2 as part of the review discussion, changes to the plan are required, the supervisor should send the plan back to the staff member to make those changes. When the staff member has made the changes, the plan is then re-submitted back to the supervisor.

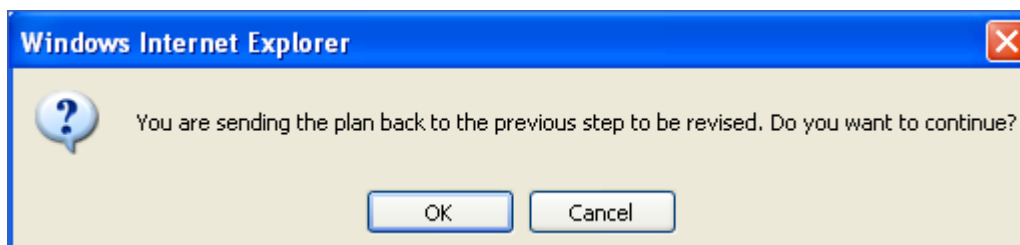
**Step 1:** Click on 'Send Back'.



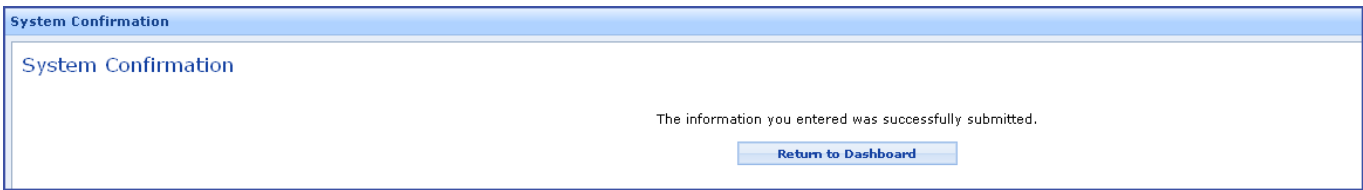
**Step 2:** Enter the send back comments in the popup box that appears and click on the 'Send' button.



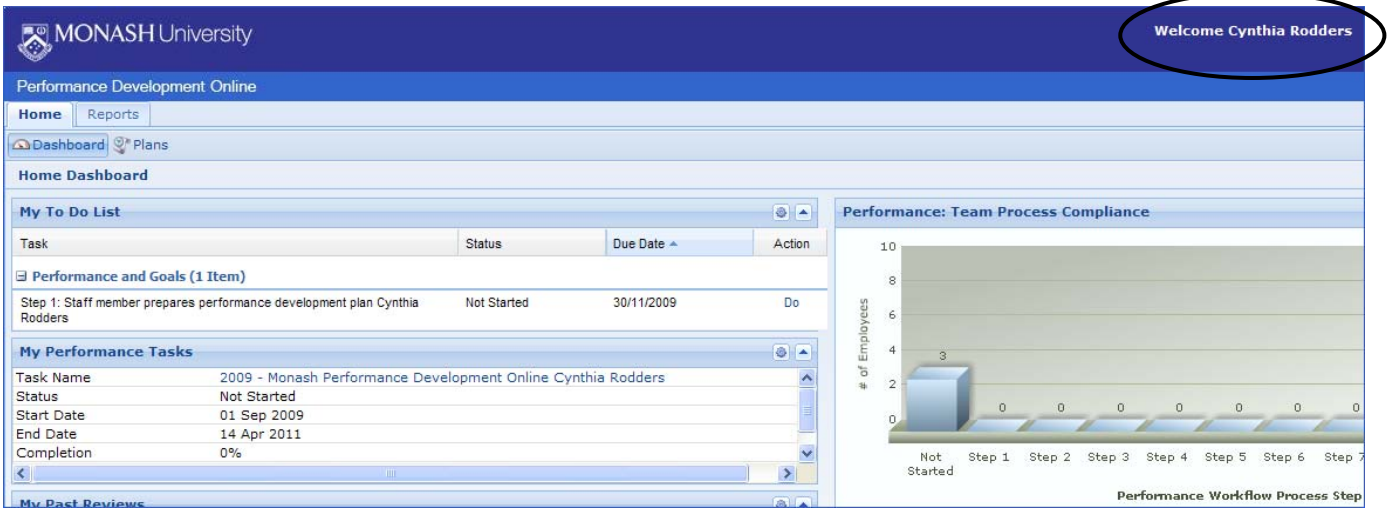
**Step 3:** A prompt will appear. Click 'OK' to confirm and continue in sending the plan back.



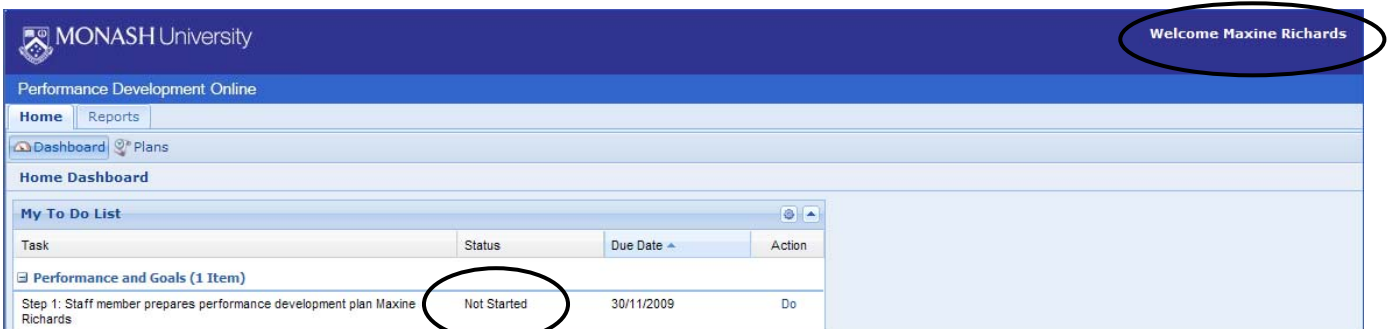
**Step 4:** A confirmation will populate. Click on 'Return to Dashboard'.



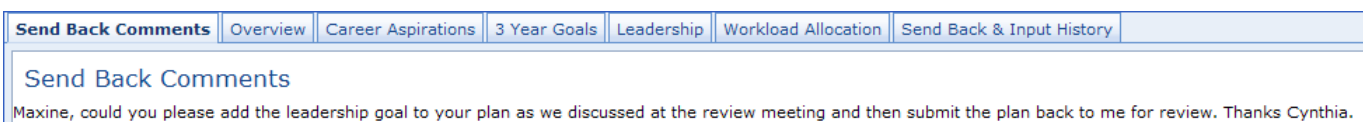
**Step 5:** The plan for the staff member will no longer be visible in the supervisor's 'My To Do List'.



**Step 6:** When the staff member signs in, the plan is shown as being at Step 1. It will have a status of 'Not Started' because the system considers it to be a new task although all previously added content will be present.



**Step 7:** When the staff member clicks on the 'Do' action item in their My To Do List, the plan will open by default to a new tab called 'Send Back Comments'. These comments will be captured in the 'Send Back & Input History' tab once the plan has been submitted back to the sender.



**Step 8:** It is now up to the staff member to follow through on the request and then submit the plan back to the supervisor. In this example, the staff member has been asked to add a Leadership goal into her plan.

Leadership Role - Goals, strategies and annual achievement indicators: 1 of 1

[Remove Goal](#)

Please select the applicable area of academic activity:

3 year goals - What are your performance goals to enable you to achieve the University's objectives and your career aspirations?

- Improve the faculty's educational outcomes and benchmark to be at least 3rd in the G08.

Strategies - What are your strategies and what development and/or support do you require to achieve the performance goals?

- Introduce new courses consistent with strategic direction and scope the implementation of courses in overseas campuses.
- Strengthen the flow on from undergraduate courses to HDR courses.

Achievement indicators - What annual targets and measures will demonstrate that you have achieved the performance goals?

- Number of courses developed with other universities

**Step 9:** Click into the 'Send Back & Input History' tab and enter response comments into the Response to 'Send Back' request section.

Send Back Comments | Overview | Career Aspirations | 3 Year Goals | Leadership | Workload Allocation | **Send Back & Input History**

Send Back and Request Input History

**i** This section is used to record 'Send Back' and 'Request Input' history for a staff member's performance development plan.  
 'Send Back' history is populated when a user sends a plan back to the previous step in PDO using the 'Send Back' button.  
 'Request Input' history is populated when a user sends the plan onto another PDO user by clicking on the 'Request Input' button.  
 Responses to the send back and request input comments should be recorded in the 'Response comments' text boxes. The 'Response history' will be updated with the comments when the plan is submitted back and input is returned.

Send Back

'Send Back' requests history

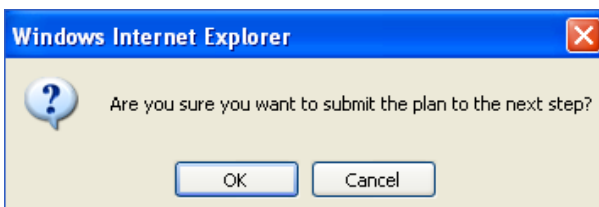
Response history

Response to 'Send Back' request:

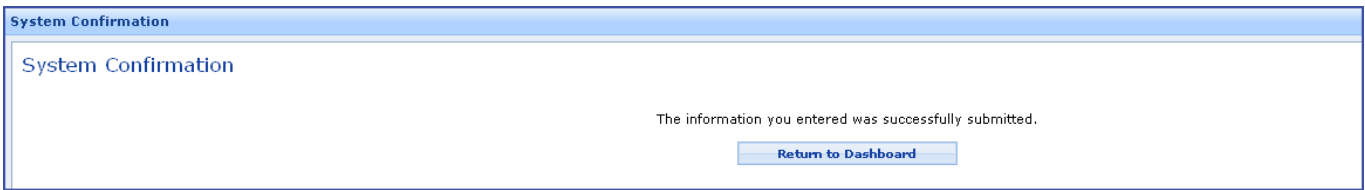
**Step 10:** When the plan is ready to be submitted back to the supervisor, click on the 'Submit' button.



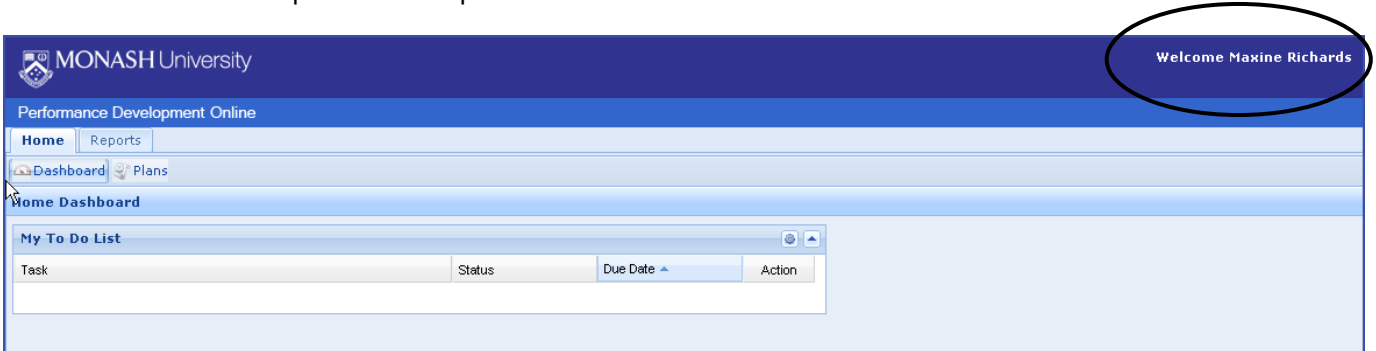
**Step 11:** A confirmation will populate. Click on 'OK' to continue.



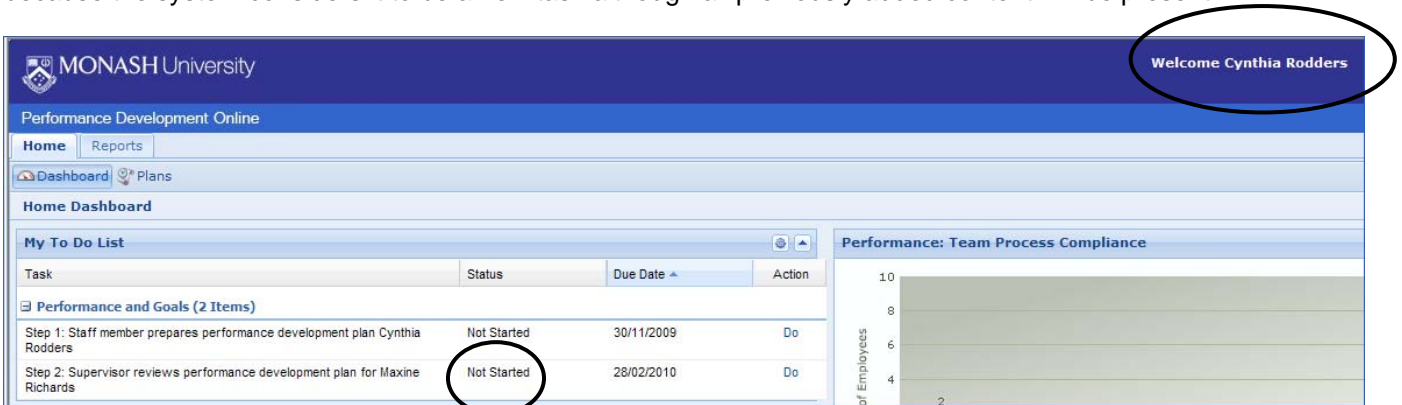
**Step 12:** A confirmation will populate. Click on 'Return to Dashboard'.



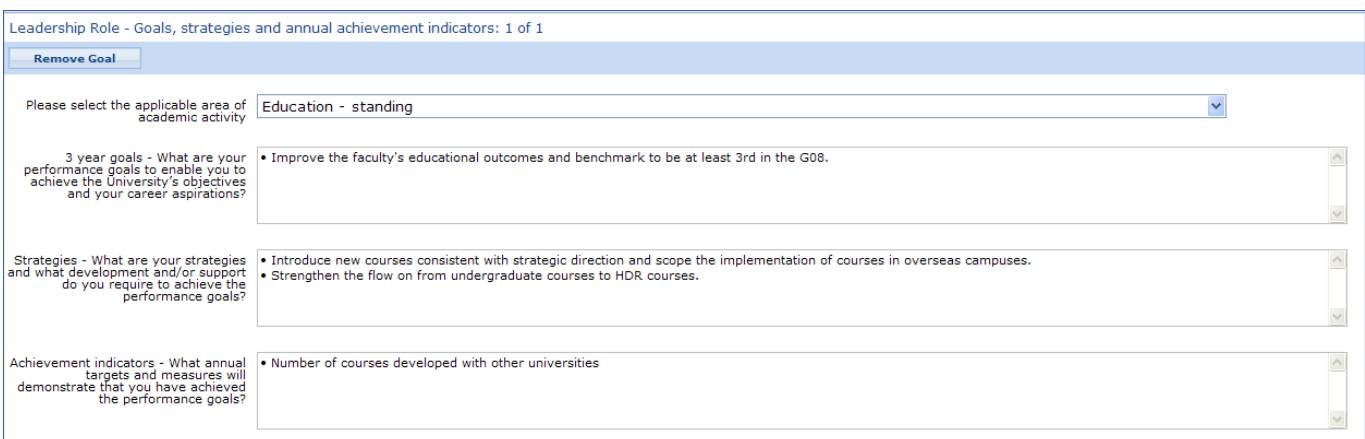
**Step 13:** When the staff member returns to the dashboard, the plan will no longer be visible since it has been submitted back to the supervisor at step 2.



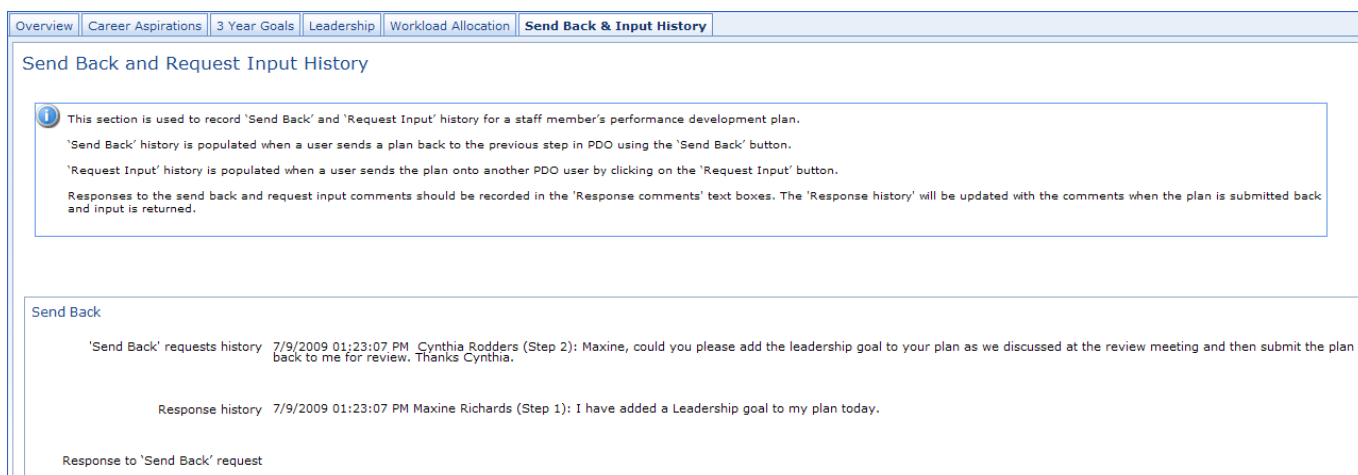
**Step 14:** When the supervisor signs in, the plan is showing as being at Step 2. It will have a status of 'Not Started' because the system considers it to be a new task although all previously added content will be present.



**Step 15:** Click on 'Do' to open the plan and navigate to the 'Leadership' tab to review the additional content that the staff member has provided.



**Step 16:** Click into the 'Send Back & Input History' tab to view the 'Send Back' and response history.



**Send Back and Request Input History**

This section is used to record 'Send Back' and 'Request Input' history for a staff member's performance development plan.

- 'Send Back' history is populated when a user sends a plan back to the previous step in PDO using the 'Send Back' button.
- 'Request Input' history is populated when a user sends the plan onto another PDO user by clicking on the 'Request Input' button.

Responses to the send back and request input comments should be recorded in the 'Response comments' text boxes. The 'Response history' will be updated with the comments when the plan is submitted back and input is returned.

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**Send Back**

'Send Back' requests history 7/9/2009 01:23:07 PM Cynthia Rodders (Step 2): Maxine, could you please add the leadership goal to your plan as we discussed at the review meeting and then submit the plan back to me for review. Thanks Cynthia.

Response history 7/9/2009 01:23:07 PM Maxine Richards (Step 1): I have added a Leadership goal to my plan today.

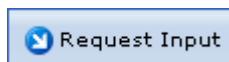
Response to 'Send Back' request

## Request Input

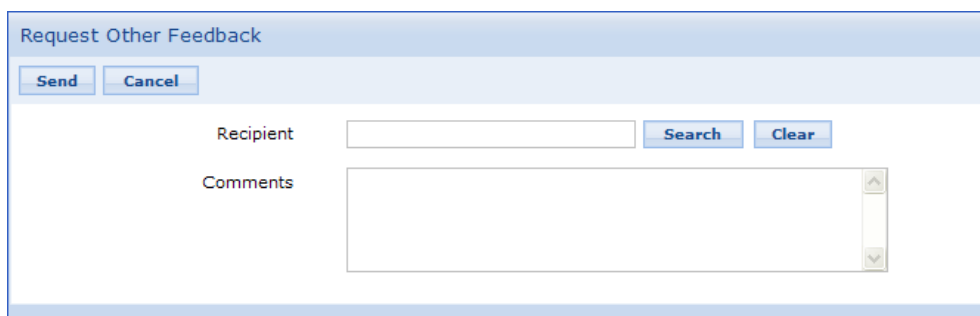
The 'Request Input' function enables the step owner to send a message to another person to ask for input or advice about a particular plan. At step 1, the staff member might wish to seek advice about their plan from their secondary supervisor or a colleague. At step 2, a supervisor might wish to seek advice on a staff member's plan from the staff member's secondary supervisor.

*\*Be aware that if you send a request for input, your plan becomes reassigned with the same access you currently have as the step owner and the person who receives the request will have read and write access to your plan.*

**Step 1:** Click on 'Request Input'.




**Step 2:** The 'Request Input' comments screen will appear.



**Step 3:** To select the person you are sending the plan to, click on the name of a 'Team Member' that appears in the list, or perform an individual search.

To perform an individual search, type in part of the surname of the person you wish to search for and then click on the magnifying glass button.

- If you need to clear the search results and conduct a new search, click on the 'x' next to the magnifying glass button
- Entering no name into the search area and clicking on the magnifying glass button will return all possible results



**Select Employee**

**Myself**

**Team Member**

- Fanny Marshia Young
- Flora Julie Bishop
- Maxine Richards

**Search**

Search: lefthau

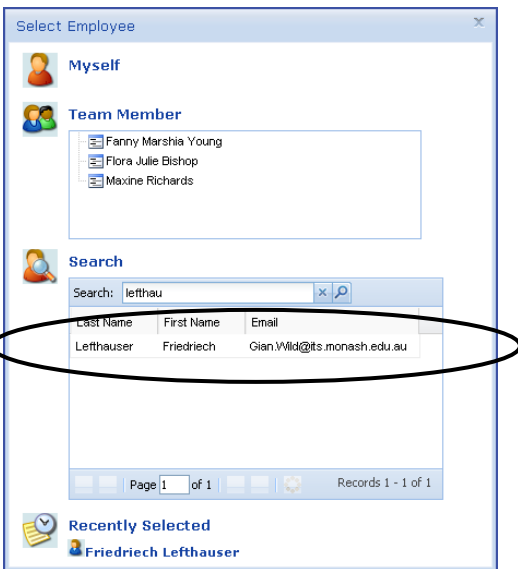
Last Name	First Name	Email
Lefthauer	Friedrich	Gian.Vild@its.monash.edu.au

Page 1 of 1 Records 1 - 1 of 1

**Recently Selected**

- Friedrich Lefthauer

Click on the name that appears in the search results. The name will display in the 'Recipient' bar on the 'Request Input' screen when it populates.



**Select Employee**

**Myself**

**Team Member**

- Fanny Marshia Young
- Flora Julie Bishop
- Maxine Richards

**Search**

Search: lefthau

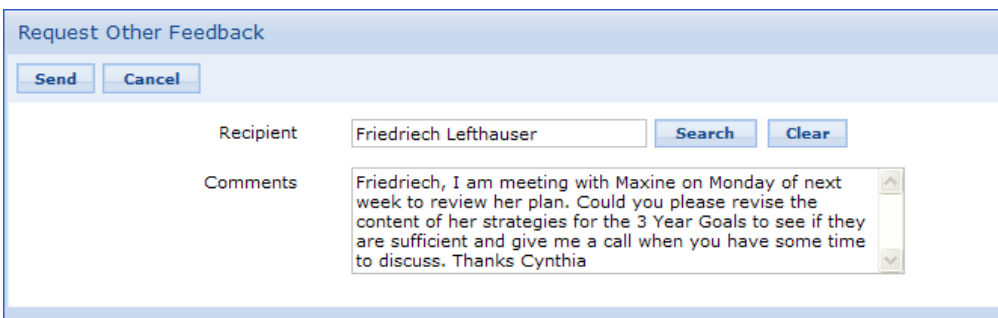
Last Name	First Name	Email
Lefthauer	Friedrich	Gian.Vild@its.monash.edu.au

Page 1 of 1 Records 1 - 1 of 1

**Recently Selected**

- Friedrich Lefthauer

**Step 4:** Enter comments for the recipient and click on the 'Send' button (*in this example the plan is being sent from a staff member's supervisor to their secondary supervisor*).



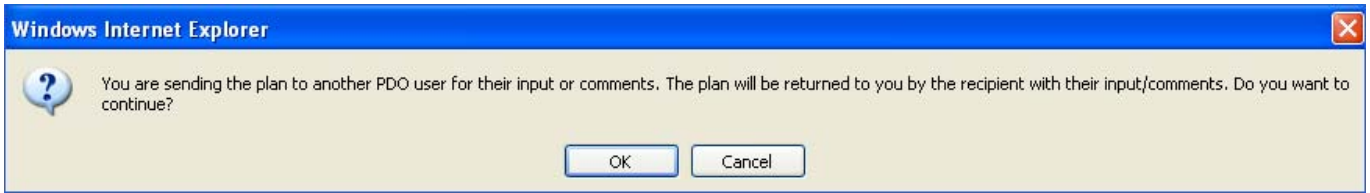
**Request Other Feedback**

**Send** **Cancel**

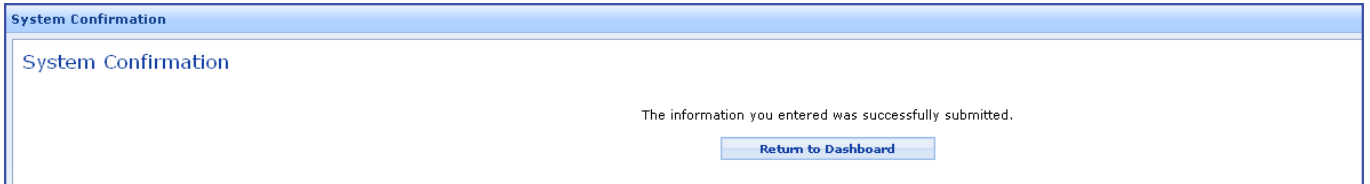
Recipient: Friedrich Lefthauer **Search** **Clear**

Comments: Friedrich, I am meeting with Maxine on Monday of next week to review her plan. Could you please revise the content of her strategies for the 3 Year Goals to see if they are sufficient and give me a call when you have some time to discuss. Thanks Cynthia

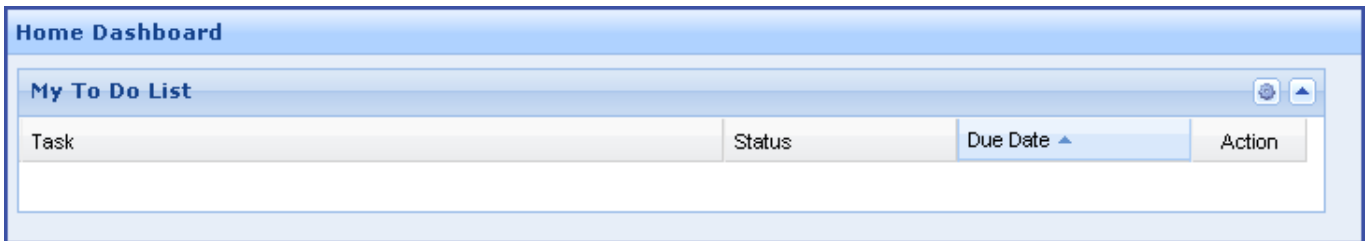
**Step 5:** A prompt will appear. Select 'OK' to confirm.



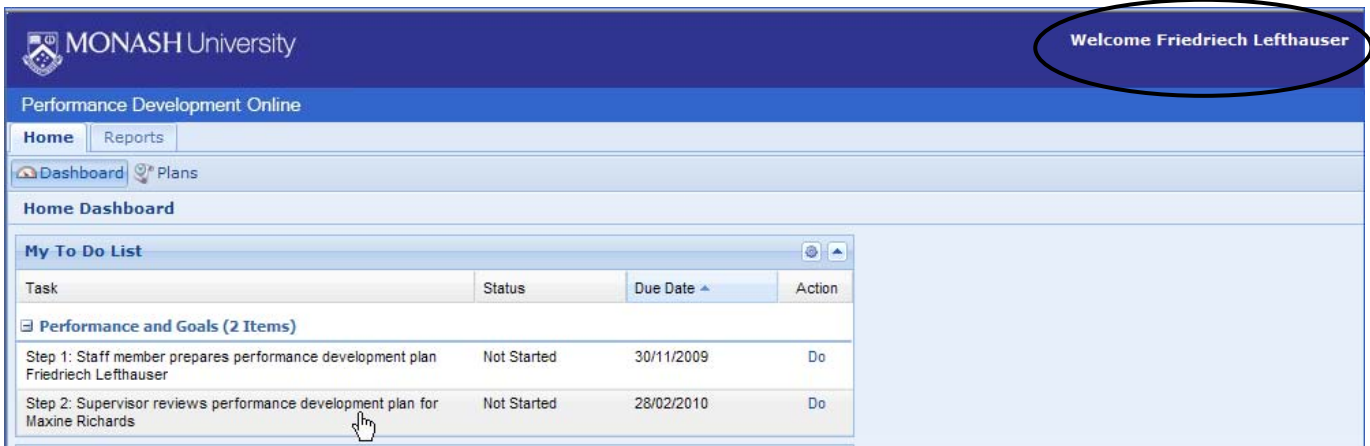
**Step 6:** A 'System Confirmation' message will populate. Click on 'Return to Dashboard'.



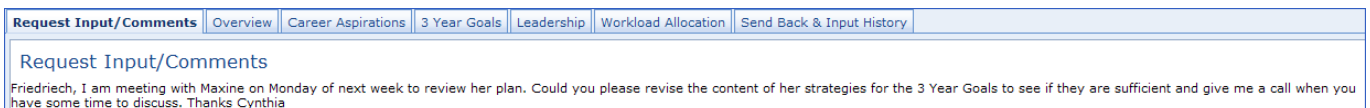
**Step 7:** When returning to the 'My To Do List', the task will not be visible since the plan has been re-assigned to the person you sent the plan to.



**Step 8:** The plan will appear in the 'My To Do List' of the person you sent the plan to.



**Step 9:** When the plan is opened from the recipient's 'My To Do List', it will open by default to a new tab called 'Request Input/Comments'. These comments will be captured in the 'Send Back & Input History' tab once the plan has been returned to the sender.



**Step 10:** It is now up to that person to follow through on the request and then return the plan back the owner.

**Step 11:** Response comments should be entered into the Response to 'Request Input' section of the 'Send Back & Input History' tab.

**Send Back**

'Send Back' requests history 7/9/2009 01:23:07 PM Cynthia Rodgers (Step 2): Maxine, could you please add the leadership goal to your plan as we discussed at the review meeting and then submit the plan back to me for review. Thanks Cynthia.

Response history 7/9/2009 01:23:07 PM Maxine Richards (Step 1): I have added a Leadership goal to my plan today.

Response to 'Send Back' request

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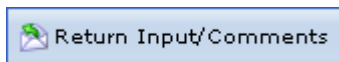
**Request Input**

'Request Input' history

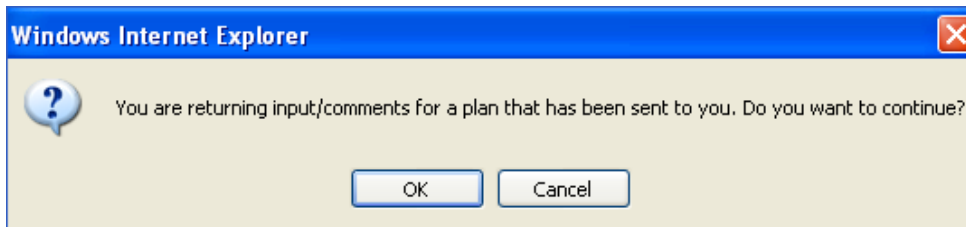
Response history

Response to 'Request Input' Cynthia, I have reviewed Maxine's plan and am happy with the content she has provided. Regards, Friedrich.

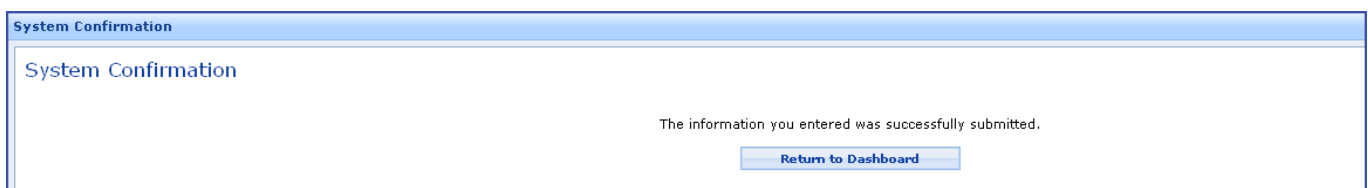
**Step 12:** When the plan is ready to be returned, click on 'Return Input/Comments'



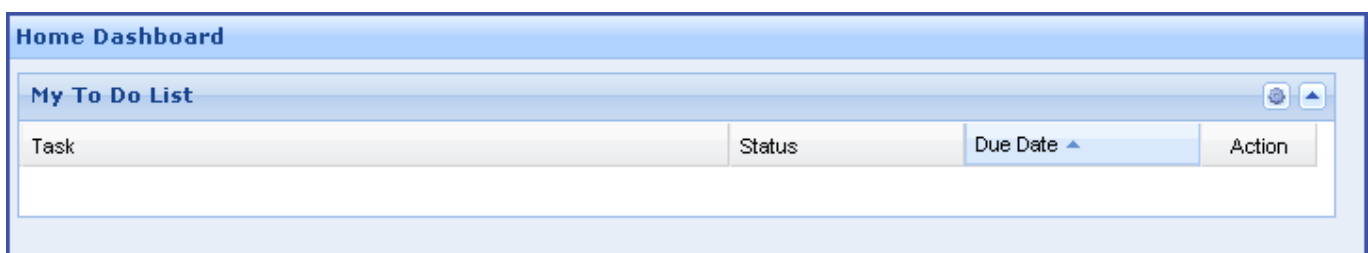
**Step 13:** A prompt will appear. Select 'OK' to confirm.



**Step 14:** A confirmation will populate. Click on 'Return to Dashboard'.



When returning to the dashboard, the plan will no longer be visible since it has been returned to the sender.





When the sender signs back into PDO, the 'Send Back & Input History' tab will show the 'Request Input' and Response to 'Request Input' history.

Overview	Career Aspirations	3 Year Goals	Leadership	Workload Allocation	<b>Send Back &amp; Input History</b>
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the plan is submitted back and input is returned.

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**Send Back**

'Send Back' requests history 7/9/2009 01:23:07 PM Cynthia Rodders (Step 2): Maxine, could you please add the leadership goal to your plan as we discussed at the review meeting and then submit the plan back to me for review. Thanks Cynthia.

Response history 7/9/2009 01:23:07 PM Maxine Richards (Step 1): I have added a Leadership goal to my plan today.

Response to 'Send Back' request

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**Request Input**

'Request Input' history 8/9/2009 10:27:04 AM Cynthia Rodders (Step 2): Friedrich, I am meeting with Maxine on Monday of next week to review her plan. Could you please revise the content of her strategies for the 3 Year Goals to see if they are sufficient and give me a call when you have some time to discuss. Thanks Cynthia

Response history 8/9/2009 10:27:04 AM Friedrich Lefthauser (Step 2): Cynthia, I have reviewed Maxine's plan and am happy with the content she has provided. Regards, Friedrich.

Response to 'Request Input'