



Cafcass PLR Guidance

All Staff

Complete a Self-Assessment form

Add PLR Feedback

View my PLRs / Actions / General Meetings

Complete a General Meeting form

Managers

Schedule a first PLR

Complete a PLR form

Amend a PLR date

View completed staff PLRs



1 From the My PLRs page, click the 'Open' button under the SAT heading for the date that your PLR is scheduled for.

The Self-Assessment (SAT) status is indicated by the circle icon (grey: not started, amber: in progress, green: complete).

Please note the 'Save & Continue' and Exit' buttons – these appear on every page. Please ensure that you regularly save whilst completing the form to prevent loss of data.



Save & Continue



Exit

Cafcass PLR - My PLRs

[Cafcass Home](#)

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Refresh
View



My
PLRs



General
Meetings



New
GM

Scheduled Date

SAT

PLR

Feedback

13 June 2017 - 13:00



Open

2

The Self-Assessment form will open on the 'Basic Details' page. This will display details from your iTrent staff record.

My Details

Staff Name:

Andrew Thorpe

Job Title:

Senior Analyst


Manager:

Ben Rolfe

Service Area/Team:

MIS

3

The 'Review of Period' page will first display your annual leave and sickness absence for the last 3 months, click the  symbol to expand each section to view.

FCAs will also see workload information on this page.

Review of Period

How would you rate your General Wellbeing for the review period on a scale from 1 (Poor) to 5 (Good)?*

Poor ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Good

How would you rate your Work-Life Balance for the review period on a scale from 1 (Poor) to 5 (Good)?*

Poor ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Good

How manageable has work been for you during the review period on a scale from 1 (Unmanageable) to 5 (Manageable)?

* Unmanageable ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 Manageable

How has work been for you?

Please use this space to list any items for discussion with your manager in relation to this review period including, but not limited to:

- Information on Workload (Quantity and Complexity)
- Health and Wellbeing
- Work-Life Balance
- Ways of Working
- Any issues that may impact on Professional Performance

Basic Details

Review of Period

Quality and Compliance

Learning and Development


Feedback


Service Standards

Submit

Annual Leave

The below tables show any Annual Leave that you have either taken in the **past**, or are currently have booked for the **future**. This data is fed directly from iTrent and updated on a daily basis, if this does not appear to be accurate, please consult Self Service in the first instance.

 Past Leave

 Future Leave

Leave Type	Leave Start	Leave End	Leave Days
Holiday	14/08/2017	18/08/2017	5
Holiday	28/08/2017	01/09/2017	5

Sickness Absence

The below tables show any sickness absence that you have taken in the past 3 months, if an instance of absence started outside of the 3 month window but featured absence in the period it will be shown below.

There are no periods of Sickness Absence in the past 3 months

4

Scroll down and answer the questions around wellbeing and workload from the 1-5 options.

Beneath this you can add additional comments to explain your choices.

5

The 'Quality and Compliance' page will ask you to reflect on the quality of your work. Answer the questions around quality from the 1-5 options, and add supporting text to the comments box.

FCAs will also see a summary of their QAI data from the last 3 months on this page.

Areas of learning or areas requiring improvement

How do you feel you could have performed better/what would have helped you perform better since your last PLR:

Achievements this period

How would you rate your Achievements during this review period on a scale of 1 (Low) to 5 (High)?*

Low ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 High

What has gone well for you professionally?

Basic Details Review of Period **Quality and Compliance** Learning and Development Feedback Service Standards

Submit

Self-Assessment of Quality and Compliance information

How would you rate the Quality of your work during this review period on a scale of 1 (Low) to 5 (High)?*

Low ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 High

How would you rate your Performance and Productivity during this review period on a scale of 1 (Low) to 5 (High)?*

Low ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 High

Areas of Strengths and Good Performance

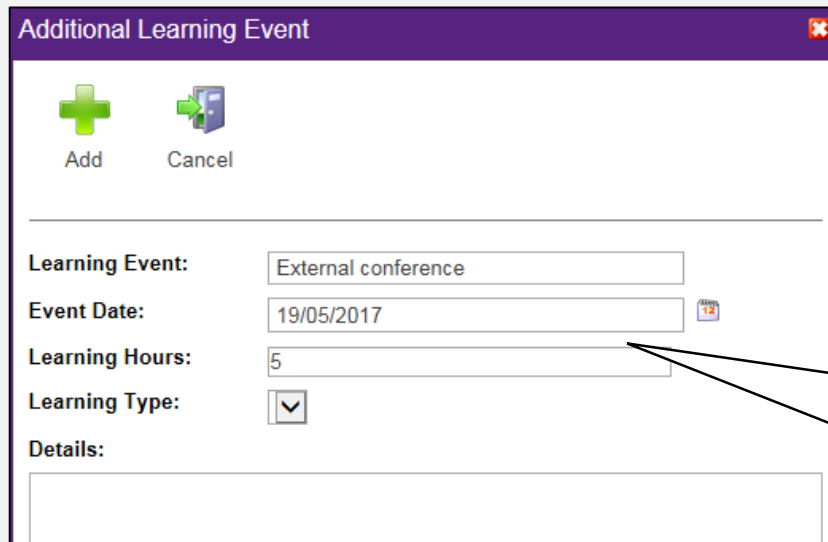
Include any improvement and progress since last PLR (What helped you to achieve this):

6

Scroll down to answer further questions relating to areas of learning and achievements.

7 The 'Learning and Development' page will ask you to reflect on learning events you have attended from the past 3 months – these will be listed at the top with a text box to comment on each one.

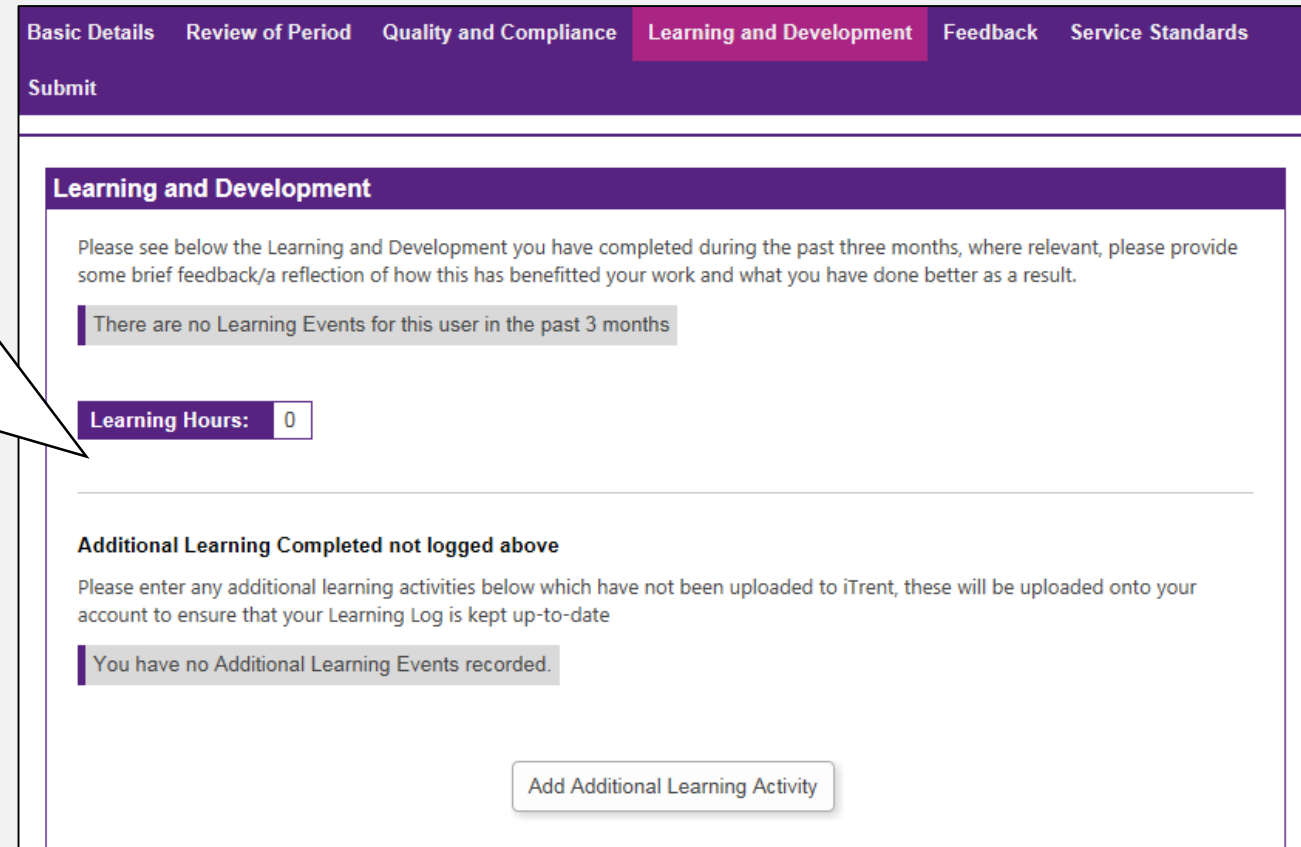
You also have the opportunity to add additional learning events that have not been booked via or entered onto iTrent – to do this click the 'Add Additional Learning Activity' button.



8

The 'Additional Learning Event' window will open, fill in the fields and click the 'Add' button and this will appear on the form.

Please note that any additional learning event that you enter here will be uploaded into your iTrent personal learning profile.



9 Scroll down and complete the remaining questions on the 'Learning and Development' page.

10 The 'Feedback' page will ask you to reflect on the support from your manager and team. Answer the questions from the 1-5 options, and add supporting text to the comments box.

[Basic Details](#) [Review of Period](#) [Quality and Compliance](#) [Learning and Development](#) **[Feedback](#)** [Service Standards](#)

[Submit](#)

Feedback for Manager

How would you rate the support provided by your manager during this review period on a scale of 1 (Low) to 5 (High)?*

Low High

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

How would you rate the support provided by your team during this review period on a scale of 1 (Low) to 5 (High)?*

Low High

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Do you have any specific feedback for your manager to consider for this review period?

Other Specific Feedback

Is there anything else that you would like to specifically discuss at your next PLR?

This is an opportunity to ask your manager questions around anything related to your professional, practice or personal situation and will help ensure the conversations are tailored to your continuous development.

11

Scroll down and use the remaining text box to add any other points you would like to raise with you manager for discussion at the PLR.

12

The 'Service Standards' page will ask you to assess yourself against the PLR Service Standards.

All applicable service standards are listed, just add a Grade from the drop-down box and add supporting evidence for this in the adjacent text box.

13

Productivity Assessment

Certain roles will also see a heading for 'Productivity Assessment' after the Service Standards. This page has a list of competency areas which you are required to respond to using the 1-5 options.

Basic Details

Review of Period

Quality and Compliance

Learning and Development

Feedback

Service Standards

Submit

Review of Service Standards

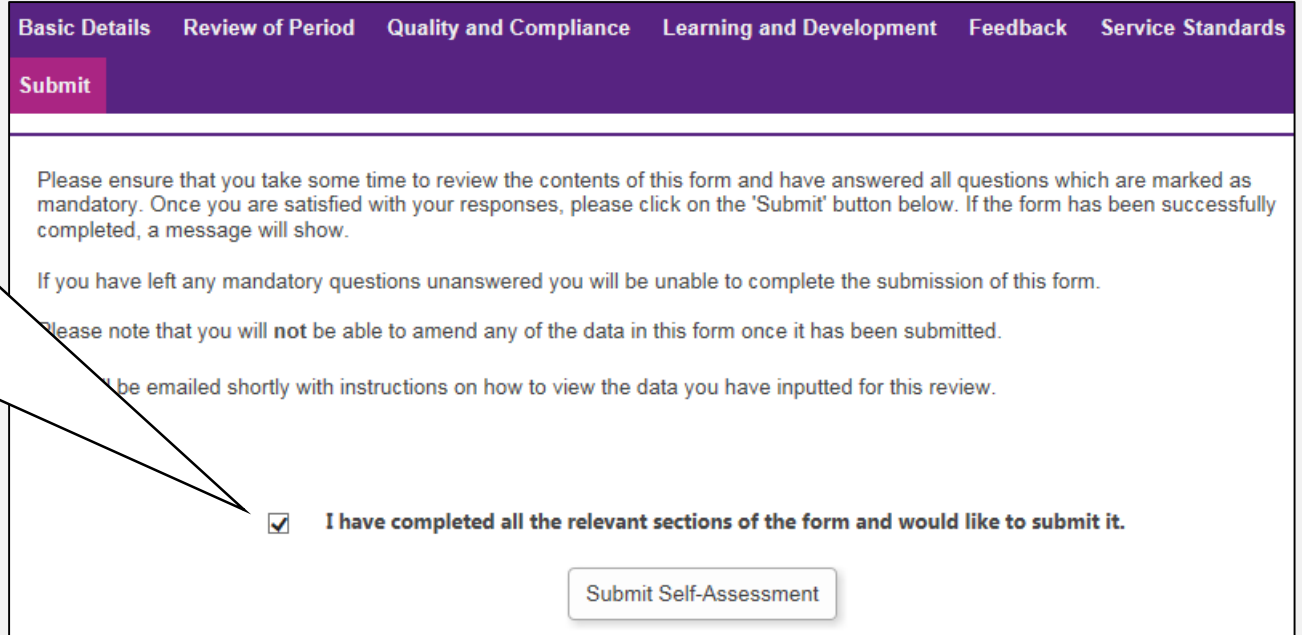
Please assess your performance against the below Service Standards in the review period. These responses will be shared with your manager in your upcoming PLR and you will have a chance to review these responses in the future as part of your own personal development.

Service Standard	Grade	Evidence
Safe	<div>Good</div>	<div>Enter evidence here</div>
Service Effectiveness	<div></div>	
Quality	<div></div>	

14 The 'Submit' page will ask you to confirm the form is complete by ticking the box, which will make the 'Submit Self-Assessment' box visible.

After submitting you will see a confirmation appear on screen.

Both you and your manager will receive an email confirmation of the form submission.



Basic Details Review of Period Quality and Compliance Learning and Development Feedback Service Standards

Submit

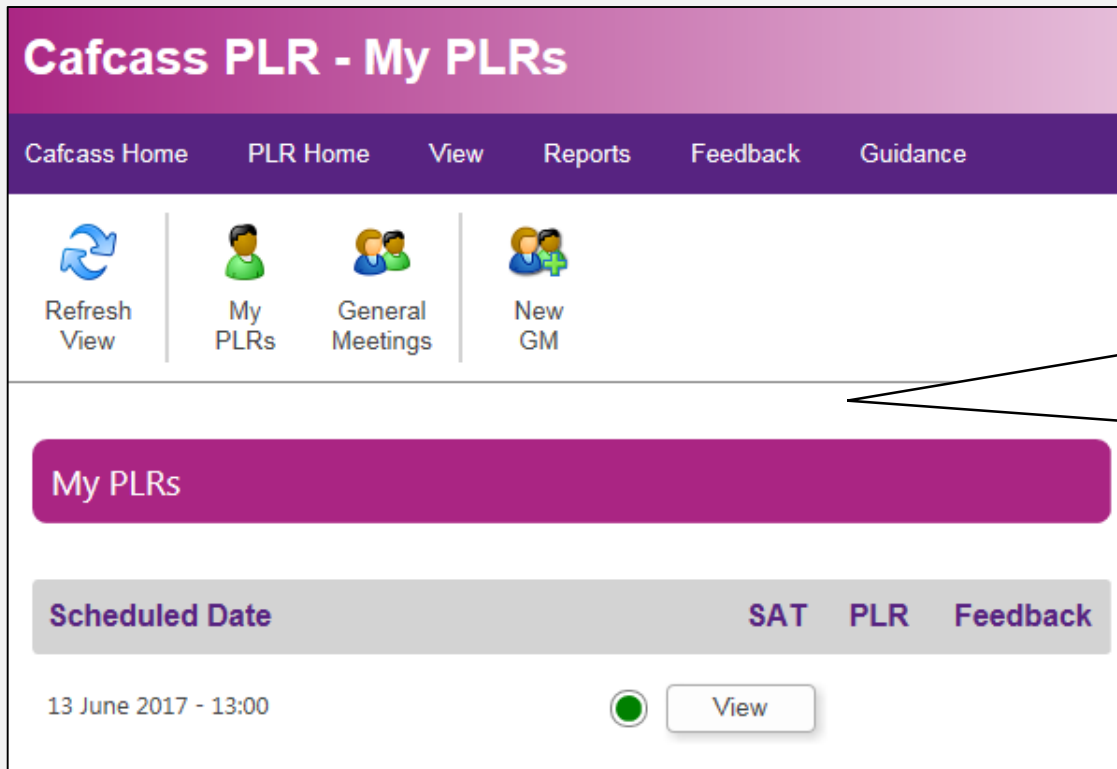
Please ensure that you take some time to review the contents of this form and have answered all questions which are marked as mandatory. Once you are satisfied with your responses, please click on the 'Submit' button below. If the form has been successfully completed, a message will show.

If you have left any mandatory questions unanswered you will be unable to complete the submission of this form.

Please note that you will **not** be able to amend any of the data in this form once it has been submitted. You will be emailed shortly with instructions on how to view the data you have inputted for this review.





☒ I have completed all the relevant sections of the form and would like to submit it.

Submit Self-Assessment




Cafcass PLR - My PLRs

Cafcass Home PLR Home View Reports Feedback Guidance

 Refresh View  My PLRs  General Meetings  New GM

My PLRs

Scheduled Date	SAT	PLR	Feedback
13 June 2017 - 13:00		View	

15 You will return to the 'My PLRs' page at this point.

Click the 'Refresh View' button and you will see the circle change to green, and the adjacent button now changes to 'View' – clicking this allows you to view your completed Self Assessment in read-only mode.



The 'My PLRs' page will show a list of your PLRs in date order.

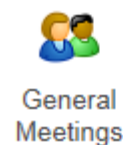
Your next PLR will always appear at the top.

You completed PLRs will appear below in purple text with the grade appended.

To view the PLR record in read-only mode, click the view icon.

To add feedback to a completed PLR, click the feedback icon and the below box will appear.

Cafcass PLR - My PLRs


[Cafcass Home](#)
[PLR Home](#)
[View](#)
[Reports](#)
[Feedback](#)
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You can toggle the view between 'My PLRs' and 'General Meetings' using these buttons.

My PLRs

Actions Log

Scheduled Date

[SAT](#)
[PLR](#)
[Feedback](#)


13 June 2017 - 13:00


[View](#)

Additional Action

22 Mar 2017

27 May 2017 - Good


[Open](#)


PLR to SharePoint OMT Demo

15 Mar 2017

PLR Feedback



Save
Feedback



Cancel

Feedback:

Enter Feedback here

Your outstanding actions will display here. You can click on an Action to highlight it, then the buttons to amend and complete the action will be clickable.



Cafcass PLR - My PLRs



[Cafcass Home](#) [PLR Home](#) [View](#) [Reports](#) [Feedback](#) [Guidance](#) [Admin](#)



Refresh
View



My
PLRs



General
Meetings



New
GM

1

From either the 'My PLRs' or 'Manage People' pages, click the 'New GM' button.

2

The General Meeting form will open on the 'Meeting Record' page.

It will display your name as the reviewer and prompt you to enter the meeting date.



Save &
Continue



Exit

Please note the 'Save & Continue' and 'Exit' buttons – Please ensure that you regularly save whilst completing the form to prevent loss of data.

[Meeting Record](#) [Actions](#) [Submit](#)

Basic Details

Reviewer Name: Thorpe, Andrew - Cafcass

Date of Meeting: *

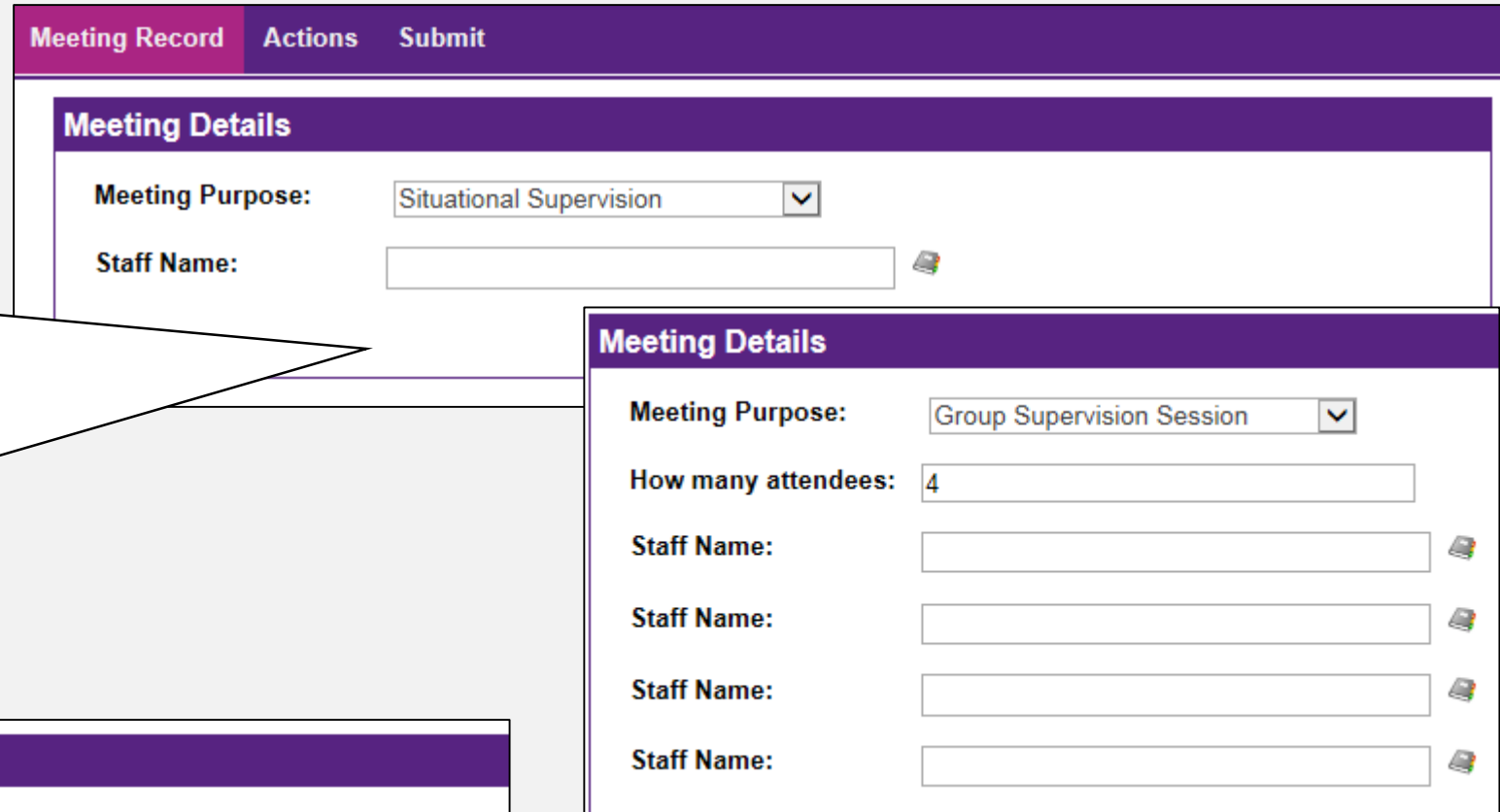


3

Select the meeting purpose from the available options.

Following this a new field will appear for you to select the meeting participant.

If you select the 'Group Supervision Session' option, you will then be prompted to enter the number of attendees. You will then see new fields according to the number to allow you to select each individual attendee.

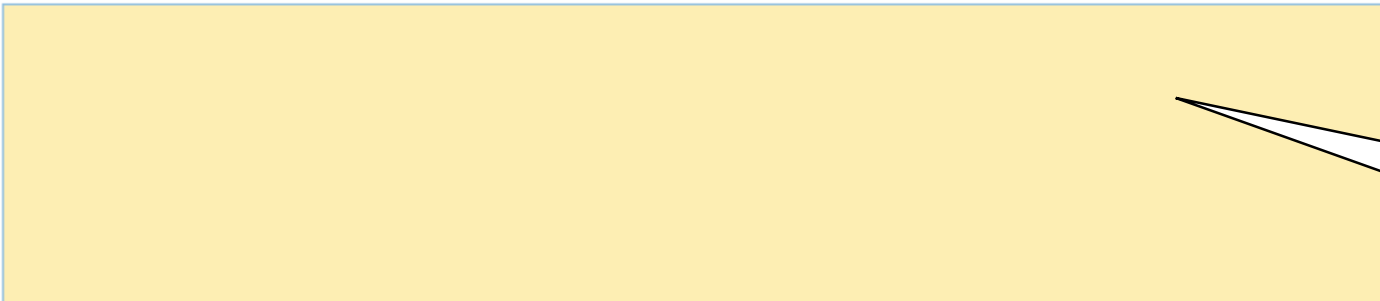


The screenshot displays the 'Meeting Details' section of a form. At the top, there are three tabs: 'Meeting Record' (highlighted in purple), 'Actions', and 'Submit'. Below the tabs, the 'Meeting Details' section is shown in two states. In the first state, 'Meeting Purpose' is set to 'Situational Supervision' and 'Staff Name' has a single text input field. In the second state, 'Meeting Purpose' is set to 'Group Supervision Session', and the form prompts for 'How many attendees' (with the value '4' entered) and then provides multiple 'Staff Name' input fields, each accompanied by a small icon of a person.

Meeting Summary

Summary of Meeting*

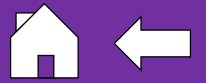
Please provide details of any discussions held in your meeting.



A large, empty yellow rectangular text box intended for the user to enter the details of the meeting discussion.

4

Scroll down the page and you will see a text box for the Summary of Meeting, into which you can enter the full content of the meeting.



5 If there are new actions agreed at the meeting, click the 'Actions' heading, and then click the 'Add New Action' button.

6 The 'New Action' window will appear, complete all fields and then click the 'Add button. You will get an on-screen confirmation that the action has been added.

Meeting Record Actions Submit

New Actions Agreed

Add New Action

7 Once all actions are added, click the 'Submit' heading.

Tick the box and the 'Submit GM' button will now be available. After clicking this you will get an on-screen confirmation that the form has been submitted, and you will return to the 'My PLRs' or 'Manage People' page.

New Action

Add Cancel

Action Title: Test Action

Description: Test Description

Goal: Test Goal

Action Type: Performance Improvement

Action Owner: Marsh, Billy - Cafcass

Action Start: 11/07/2017

Action Due: 14/07/2017

Meeting Record Actions Submit

Please ensure that you take some time to review the contents of this form and have answered all questions which are marked as mandatory. Once you are satisfied with your responses, please click on the 'Submit' button below. If the form has been successfully completed, a message will show.

If you have left any mandatory questions unanswered you will be unable to complete the submission of this form.

Please note that you will not be able to amend any of the data in this form once it has been submitted.

You will be emailed shortly with instructions on how to view the data you have inputted for this review.

☒ I have completed all the relevant sections of the form and would like to submit it.

Submit GM



Schedule a first PLR for a reportee



1

From the Manage People page, click the 'Schedule' button next to the reportee name.

Schedule Personal Learning Review

Save Cancel

Staff:

Date:

Start Time:






End Time:

Location:

Cafcass PLR - Manage People



[Cafcass Home](#) [PLR Home](#) [View](#) [Reports](#) [Feedback](#) [Guidance](#)

 Schedule PLR  New GM  Edit PLR  Delete PLR  Refresh

PLRs

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy				Schedule

2

A pop-up window will appear for you to fill out a few details. Clicking Save will register the details and send an *Outlook meeting invite* to you and the reportee for the specified date and time.


3

The date will now appear next to the reportee name and the button will change to Open. The Self-Assessment (SAT) status is indicated by the circle icon (grey: not started, amber: in progress, green: complete).

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy	26 Jun 2017			Open





1

On the Manage People page, if the Self-Assessment (SAT) has been completed, it will now show as a green circle. You can view the full SAT form by clicking the  icon.

2

To complete the PLR form, click the 'Open' button.

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy	26 Jun 2017			<button>Open</button>

Please note the 'Save & Continue' and Exit' buttons – these appear on every page. Please ensure that you regularly save whilst completing the form to prevent loss of data.



Save & Continue



Exit

Basic Information | **PLR Content** | Service Standards | Actions | PLR Grade | Submit

Review Details

Reviewer Name: Thorpe, Andrew - Cafcass
Staff Name: Marsh, Billy - Cafcass
Date of PLR: 
Self-Assessment:  Complete | [Open SAT Form](#)
Self-Approver? ☐

Quick Links:

[myWork](#) | [QAI Reports](#)


3

The PLR form will open on the 'Basic Information' page.

This will confirm the status of the Self-Assessment and has links to MyWork and QAI Reports.

Scroll down to see sickness and annual leave absence details for the reportee.

4

The 'PLR Content' page will pull through the responses from the reportee's Self-Assessment – just click the  symbol to expand each section to view. You can then comment on the data in the text box below.

Review of General Meetings

No General Meeting Record Data Available

Please Comment on the above General Meeting Record

Please use the space below to record any conversations about the above data from the General Meeting Record .

Review of Future Aspirations/Potential

Comments on Future Aspirations/Potential

Please use the space below to record any conversations about the future potential and aspirations of your reportee *.


This can include, but is not limited to discussions around:


- Career Progression
- Personal/Professional Development
- Future Learning and Development Opportunities


Basic Information **PLR Content** Service Standards Actions PLR Grade Submit

Self-Assessment Data

Your reportee has recently completed a Self-Assessment Tool and has provided feedback on a range of areas in relation to their work, a top-level summary is provided below, along with some further information that you can view toggling between the various sections.

 Self-Assessment Matrix

 Self-Assessment Further Information

 Feedback/Reflection on Training Completed

Please Comment on the above Self-Assessment Data

Please use the space below to record any conversations about the above data from the Self-Assessment Tool *.

5

Scroll down the page and you will see a summary of any General Meetings for the reportee, along with space for comments.

Further down there is a comments box to record detail about career progression and personal development.

6

The 'Service Standards' page will show detail of the reportee's Self Assessment of Service Standards along with their evidence.

To input your assessment of the Service Standards, click the 'Add Service Standard' button below.

Add Service Standard



Save
Standard



Cancel

Service Standard:

Safe

Grade:

Good

Evidence:

Input evidence here

Basic Information

PLR Content

Service Standards

Actions

PLR Grade

Submit

Staff Self-Assessment of Service Standards

Please provide a grading for your reportee against Cafcass' Service Standards. Below you will see the areas that they have recently graded themselves against in their most recent Self Assessment.

Service Standard	Grade	Evidence
Safe	Good	Some evidence against the Safe Service Standard
Service Effectiveness	Met	Some evidence against the Service Effectiveness Standard
Quality	Requires Improvement	Some evidence against the Quality Service Standard.

Manager's Assessment of Service Standards

Please grade and provide an assessment against a **minimum of 1 Service Standard** for your reportee below.*

For more information on the Cafcass Service Standards, please consult the [Supervision Policy](#)

Add Service Standard

Service Standard	Grade	Evidence
------------------	-------	----------

7

Complete the fields in the 'Add Service Standard' window. When complete, click the 'Save Standard' button and the detail will now appear on the form. Once on the form you can delete or amend any of the detail.

8

The 'Actions' page will show detail of the reportee's outstanding actions.

Use the icons under the 'Manage Actions' heading to edit, delete or complete the action.

You can create a new action by clicking the 'Add New Action' button.

Basic Information PLR Content Service Standards **Actions** PLR Grade Submit

Reportee's Outstanding Actions

Below is a list of current, unfinished actions that are allocated to your reportee. If an action has been completed, please enter an End Date and Evidence to support the achievement of the originally stated goals.

Action Title	Description	Goals	Action Set Date	Action Start	Action Due	Manage Actions
Test Action	Test Description updated.	Test Goal	06/09/2017	15/06/2017	29/06/2017	  
Test Action 2	Test	Test	26/06/2017	15/06/2017	29/06/2017	  

Create New Actions



Click below to create a new action, this will be added to the above list of Outstanding Actions.

Add New Action

9

Complete the fields in the 'New Action' window. When complete, click the 'Add Action' button and the detail will now appear on the form. Once on the form you can delete or amend any of the detail.

New Action

Add Action Cancel

Action Title:

Test Action

Description:

Test Description

Goal:

Test Goal

Action Type:

Performance Improvement

Action Owner:

Marsh, Billy - Cafcass

Action Start:

28/06/2017

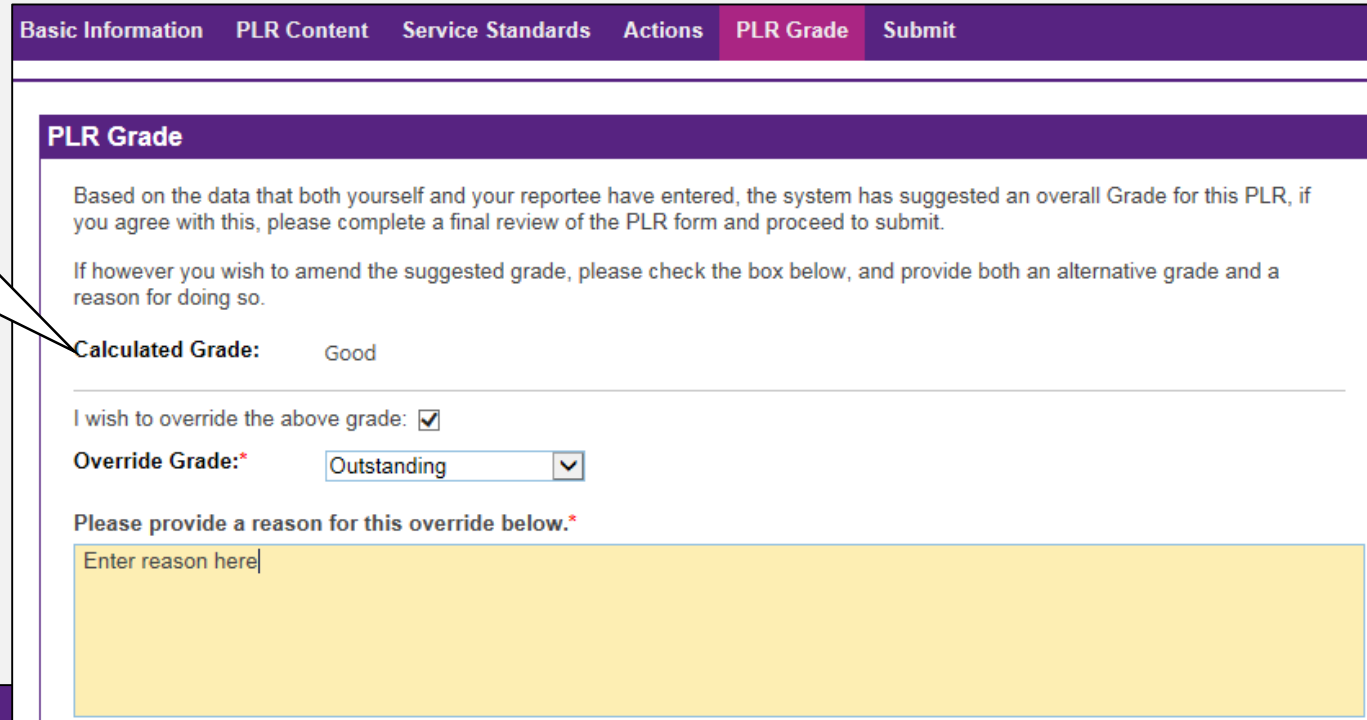
Action Due:

30/06/2017

10

The 'PLR Grade' page will show the calculated grade – this is based on grades from the service standards.

If you wish to override the grade, just tick the box and then enter a reason in the comments box.



Basic Information PLR Content Service Standards Actions **PLR Grade** Submit

PLR Grade

Based on the data that both yourself and your reportee have entered, the system has suggested an overall Grade for this PLR, if you agree with this, please complete a final review of the PLR form and proceed to submit.

If however you wish to amend the suggested grade, please check the box below, and provide both an alternative grade and a reason for doing so.

Calculated Grade: Good

I wish to override the above grade: ☒

Override Grade:* Outstanding

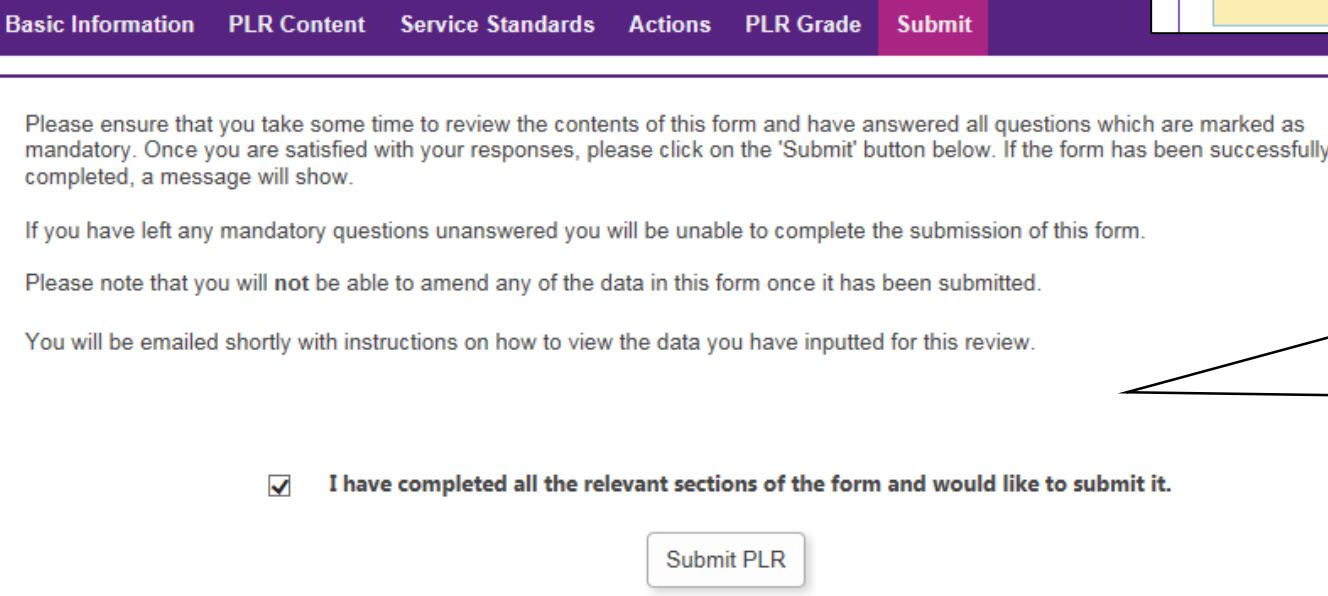
Please provide a reason for this override below.*

Enter reason here

11

On the 'Submit' page you can confirm completion of the form by ticking the box and then you can click the 'Submit PLR' button.

Both you and the reportee will receive an email confirmation of the PLR submission.



Basic Information PLR Content Service Standards Actions **PLR Grade** **Submit**

Please ensure that you take some time to review the contents of this form and have answered all questions which are marked as mandatory. Once you are satisfied with your responses, please click on the 'Submit' button below. If the form has been successfully completed, a message will show.

If you have left any mandatory questions unanswered you will be unable to complete the submission of this form.

Please note that you will **not** be able to amend any of the data in this form once it has been submitted.

You will be emailed shortly with instructions on how to view the data you have inputted for this review.

☒ I have completed all the relevant sections of the form and would like to submit it.

Submit PLR

10

Once the PLR has been submitted, you will be prompted to schedule the next PLR for the reportee.

The date will be calculated as 3 months from the current PLR date, however you can change this at this point or at any time from the 'Manage People' page.

Enter the start and end times and a location. After clicking the 'Save' button, an Outlook meeting invite will be sent to both you and the reportee.


Schedule New PLR



Save

Please schedule a provisional date for the next PLR

Staff: Billy Marsh

Date: 27/09/2017 

Start Time: 10 00

End Time: 11 00

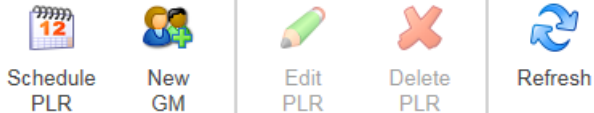
Location: Cafcass Office

11

You will then return to the 'Manage People' page.

Clicking the 'Refresh' button will show the completed PLR in purple text, with a button to 'View' a read-only copy.

The new scheduled PLR will appear above this, ready to be completed at the next meeting.



PLRs

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy	27 Sept 2017		<input type="radio"/>	<button>Open</button>
> Closed				
Outstanding	26 Jun 2017		<input type="radio"/>	<button>View</button>

Amend a PLR date



1 From the Manage People page, hover the mouse cursor over the PLR date you wish to change and tick the box to select it.

Then click the 'Edit PLR' button at the top.

Update Personal Learning Review

Save Cancel

Staff:

Date:

Start Time:

End Time:

Location:

Cafcass PLR - Manage People



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Schedule PLR New GM Edit PLR Delete PLR Refresh

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy	<input checked="" type="checkbox"/> 27 Sept 2017		<input type="radio"/>	<input type="button" value="Open"/>
Closed				
Outstanding	26 Jun 2017		<input type="radio"/>	<input type="button" value="View"/>

2

A pop-up window will appear for you with the existing PLR details. After making the required changes, Clicking 'Save' will update the PLR and send an *Outlook meeting invite* to you and the reportee for the new date and time, overwriting the previous invite.

3 The new date will now appear next to the reportee on the Manage People page.

Staff Name	Due Date	Feedback	SAT	PLR
Marsh, Billy	28 Sept 2017		<input type="radio"/>	<input type="button" value="Open"/>



1

From the Manage People page, you will see a list of your reporting staff.

All completed PLRs will show in purple text underneath the 'Closed' heading.

The most recent completed PLR will show, to view any older completed PLRs, click the ► symbol and they will appear.

Cafcass PLR - Manage People

[Cafcass Home](#)[PLR Home](#)[View](#)[Reports](#)[Feedback](#)[Guidance](#)

Schedule
PLR



New
GM



Edit
PLR



Delete
PLR



Refresh

PLRs

Staff Name

Due Date

Feedback

SAT

PLR

Marsh, Billy

28 Sept 2017



Open

► Closed

Outstanding

26 Jun 2017



View

2

Click the 'View' button to open up the completed PLR form in read-only mode.