Manager Guides: Performance Reviews

This guide provides a step-by-step overview for line managers on how to schedule, manage, and complete employee performance reviews using the iTrent system. It covers all key review types including Final Performance Reviews, Monthly Check-ins, Review and Planning stages, Objective Setting, and Probation Reviews.

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Reviews

1. To schedule a review, scroll to the **Reviews box** on you Manager Dashboard.



2. This will take you to your **Review summary**. This will show you any reviews that have been completed, scheduled and in progress.

The employees in your team will be listed on the left-hand side, if you click on them, it will take you to their **Employee Summary page**.

Trent 21/05/2025 ×									(DLT - M
SEARCH FIND ITRENT PAGES									
Organisation		Training Administrator							
DELT Shared Services Limited	Review summary	Y MENU C 👼			c	alenda	r		
People i	Insights (Reviews in the last 180 days)		2025	•	Т	oday		< MA	Y >
Results 1 Person Select all Save this group	Completed 5 Scheduled 5 0	In Progress 0	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Training Administrator	Overdue Due 0 0	Abandoned 0					1	2	3
•			4	5	6	7	8	9	10
	Reviews	ilter: Scheduled 👻 Sort: Date earliest 💌	11	12	13	14	15	16	17
	Training Administrator (Project Manager) Review name: Delt 2025/26 - Monthly Check-In Sessions	Schedule review details	18	19	20	21	22	23	24
	Between Training Administrator & Training Manager Scheduled on 17 Jul 2025	Review details	25	26	27	28	29	30	31
					+ sch	edule a m	ew review		

3. From here, you can return to the **Review summary** by scrolling down to links, clicking **Reviews**, then **Review summary**.

iTrent © 21/05/2025 ×			🗖 (DLT - MSS) 💿
SEARCH FIND ITRENT PAGES	C name.		
Organisation DELT Shared Services Limited People i Surname v Q + Results 1 Person	Personal Known as Training born on 12/03/1995 721/41186/payroll ref.) CL123456A (social security)	Employment Project Manager Project Management Office 37.00 hours Employee Full Time Permanent Occupany started on 18/11/2024 Reporting manager Training Manager Learning and Organisation Development Coordinator	
Select all Save this group	21 May - 03 Jun 2025 21 May - 03 Jun 2025 21 Sa 2 Sa 2 Sa 2 Sa 3 Sa 3 Sa 3 Sa 3 Sa 3 20 23 Sa 2 Sa 3 Sa 3	1 Apr 2025 - 31 Mar 2026 8 8 8 1 0 23 1 8 Holidays remaining (as of last calculation)	
	Personal Information Finployment Holiday Time & Expenses FisS Questionnaires Review_unimary Schedule a review View details of scheduled re Objective summary Talent profile summary Succession potential	XS Sickness Other Absence ag & Development Reviews View Complete a review Objective overview Idetails Performance Rating	

4. You can also use the calendar to see when you have reviews scheduled for your team members.

As a line manager, you can schedule a new review for your employee. Click on "+ Schedule a new review".



5. This will open the following form. You can choose between a **Final Performance Review, Monthly Check-in Sessions, Review and Planning stage**, or the **Probation Review**.

Your employee can be scheduling these reviews themselves as per the Employee guide, *Performance Reviews*, but as a line manager you can also do this on their behalf.

< Review summary) Training Administrator	
Schedule review details New		Y MENU C 🖶
Review name*	~	
Position*		
Default reviewer Override reviewer	Delt 2025-26 - Final Performance Review Delt 2025/26 - Monthly Check-in Sessions Delt 2025/26 - Review and Manning Stage. DELT Probation Test	
Invited		
Contributor		* Q 🕲
Due by date*		
Scheduled date*	—	
Scheduled start time		
Scheduled end time		
Location		

6. Complete the form, including which type of review you would like to schedule, the position of the employee, the due by date and the scheduled date. You will not need to worry about the invited sections unless your employee shares a line manager who needs to be present at the meeting.

Click "**Save**". This will then send a notification to the employee.

Note: The employee should be scheduling these from their employee selfservice so they have enough time to prepare before the meeting.

Schedule review details New		✓ MENU	с ө
Review name*	Delt 2025/26 - Monthly Check 👻		
Position*	Project Manager 🗸		
Default reviewer	Training Manager		
Override reviewer			
Invited		* Q	8
Contributor		, Q	0
Due by date*	25/06/2025	1	
Scheduled date*	25/06/2025	0	
Scheduled start time			
Scheduled end time			
Location			
Review status			
	Save Delete		

7. You can see the review summary from this page. Here you can see which reviews are in progress by the employee and which they have started to populate.

Insights (Reviews in the last 180	days)	
Completed 0	Scheduled 0	In Progress 0
∆ Overdue 0	Due 0	Abandoned 0
Reviews	F	Filter: In progress 👻 Sort: Date e
Training Administrator Review name: Delt 2025 26.	(Project Manager) Final Performance Review	Schedule review d
Between Training Administrator	& Training Manager	Review details
Scheduled on 28 May 2025 Status: In progress		•
Training Administrator	(Project Manager)	Schedule review d
Review name: Delt 2025/26 Between Training Administrator	Monthly Check-in Sessions	Review detail
Sectore and the sector and a contract of the sector and the sector	a	Keview decail

8. For example, at a **Review and Planning** stage meeting, the employee should be coming prepared with pre-populated details. Click "**Review details**" to see their comments which you can discuss at the meeting.

There is also a space for you to add comments. When you are happy, click "Save".

~	Review name: Delt 2025/26 - Review and Planning Stage. Between Training Administrator & Training Manager	Review details
	Scheduled on 18 Jun 2025	
	Status: In progress	
	Review details Training Administrator	0
	Delt 2025/26 - Review and Planning Stage. 18 June 2025 Between Training Administrator & Training Manager Position: Project Manager Status: In progress Talking points Objectives	
	Talking points	^
	Describe the Values and behaviours you want to Stop, Start and Continue (Please refer to the ormpetency framework).	^
	Identify your key development opportunities for next year 1 response	•

9. If you are ready to submit, click **"Submit review".** This will now show as completed and you can no longer make any edits.

You can still review the details of this form at any time from the **Review summary** page under completed items. This can be helpful for the **End of Year Review**.

Delt 2025/26 - Review and Planning Stage. 18 June 2025 Between Training Administrator & Training Manager Position: Project Manager Status: In progress	Submit
Talking points Object	ives
Talking points	^
Describe the Values and behaviours you want to Stop, Start and Cont competency framework).	inue (Please refer to the 1 response 🔨
Training Administrator wrote: 21/05/2025 at 12:54 itrent	

Monthly check-ins

1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



2. This will take you to this page. Follow the instructions from the first section of this guide to schedule a monthly review. Once scheduled, under the **Reviews** on the summary page, select **Review details** on the **Monthly Check-in Session**.

iTrent 21/05/2025 ×		(DLT - MSS)
SEARCH FIND ITRENT PAGES	💿 Training Administrator	
DELT Shared Services Limited	Insights (Reviews in the last 180 days)	Calendar
∧ People : (Surname → Q +	Completed 5= 0 In Progress 0	2025 • Today 〈 JUN 〉
Results 1 Person Select all Save this group	Overdue Due Abandoned	Sun Mon Tue Wed Thu Fri Sat
Training Administrator		1 2 3 4 5 6 7
	Reviews Filter: In progress • Sort: Date earliest •	8 9 10 11 12 13 14
	Training Administrator (Project Manager) Review name: Del: 2025 26 - Final Performance Review Schedule review details	15 16 17 18 19 20 21
	Between Training Administrator & Training Manager Scheduled on 28 May 2025	22 23 24 25 26 27 28
	Status: in progress	29 30
1.1	Training Administrator (Project Manager) Schedule review details Between name: Deit 2025/26 - Monthly Check-in Sessions Between Training Administrator & Training Manager Review details	+ Schedule a new review
	Scheduled on 17 jun 2025 Status: In propress	Events - 17 June 2025
		Training Administrator Scheduled In progress
	Training Administrator (Project Manager) Schedule review details Schedule review details	Delt 2025/26 - Monthly Check-in Sessions

3. This is where you can see what the employee has pre-populated. Scroll to add your comments to the comments box. Click "**Save**".

Review details Training Administrator	Y MENU C 🖶 🗓
Delt 2025/26 - Monthly Check-in Sessions 17 June 2025 Between Training Administrator & Training Manager Position: Project Manager Status: In progress Talking points Objectives Talent profile	Submit review
Talking points	^
What are the specific achievements you accomplished this month? Training Administrator wrote: 21/05/2025 at 13:40	1 response 🔺
Do you have any current work challenges?	1 response 🔺
What do you need support in?	1 response
Training Administrator wrote: 21/05/2025 at 13:40	

4. You can also refer back to **Objectives**, or the employee's talent profile summary, by clicking on each tab of this page. Any objectives set for the year will appear here.

Delt 2025/26 - Monthly Check-in Sessions Submit review
17 June 2025
Between Training Administrator & Training Manager
Position: Project Manager
Status: In progress
Talking points Objectives Talent profile summary
+ Add objective
21/05/2024
Clear search Search
Sort: Newest - oldest -
There are no objectives in the current filter

5. When you are happy with the monthly check in, click "**Submit review**", and "**Submit**" again. It will then appear in the completed section of the **Review summary page**.

Submit review	
Are you sure you want to submit? Once submitted you will not be able to edit the review Submit Cancel	n less C 🖶 🛛
Review summary Scnedule a review View details of scheduled review Objective summary Talent profile summary Succession potential details of scheduled review	w Complete a review Objective overview stails Performance Rating

Please note: Unlike CoreHR, you will have to schedule each individual monthly check-in, they are not in a list like they were previously.

End of Year Review

1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



2. This will take you to this page. Follow the instructions from the first section of this guide to schedule a **Final Performance Review**. Once scheduled, under the **Reviews** on the summary page, select **Review details** on the **Final Performance Review**.

Trent @ 21/05/2025 ×		🗖 (DLT-MSS)
SEARCH FIND ITRENT PAGES	💿 Training Administrator	
DELT Shared Services Limited	Insights (Reviews in the last 180 days)	Calendar
∧ People i Surname v Q +	⊘ Completed 0 5= 0 0	2025 • Today 〈 JUN 〉
Results 1 Person Select all Save this group	Overdue Due Abandoned	Sun Mon Tue Wed Thu Fri Sat
Training Administrator		1 2 3 4 5 6 7
	Reviews Filter: In progress • Sort: Date earliest •	8 9 10 11 12 13 14
	Training Administrator (Project Manager) Review name: Delt 2025.26 - Final Performance Review Schedule review details	15 16 17 18 19 20 21
	Between Training Administrator & Training Manager Review details Scheduled on 28 May 2025	22 23 24 25 26 27 28
	Status: In progress	29 30
	Training Administrator (Project Manager) Review name: Del: 2025/26 - Monthly Checkin Sessions Between Training Administrator & Training Manager Be	+ Schedule a new review
	Scheduled on 17 Jun 2025 Status: In progress	Events - 17 June 2025
		Training Administrator Scheduled In progress
	Training Administrator (Project Manager) Schedule review details Schedule review details	Delt 2025/26 - Monthly Check-in Sessions

3. This is where you can add your commentary on the employee's performance alongside their comments that they will have pre-populated.

l	Performance Management Guidelines: <u>PM Guidelines 2022 V1.2.docx (sharepoint.com)</u> Performance Rating Guidance: <u>Performance Rating Guidance V1.1.docx (sharepoint.com</u>)		
	Talking points Objectives Talent profile summary		
	*End of year 1. Describe performance against core job responsibilities, key performance indicators (KPIs), demonstration of our values, and objectives set	1 response	
	*End of year 2. List Key accomplishments for the year	1 response	

4. Next, complete the competency level for each of our measurable values.

O Leading/teaching Living O Not living	
Training Administrator selected a single option respon Living	se: 21/05/2025 at 13:45
Competency 2: Develop and empower - We develop and empo	ower our people 1 response

5. The employee will have already put what they believe their performance rating is. This is where you can choose from the drop-down. Click "**Save**" once complete.

ľ	1. Not meeting expectations	
	2. Partially meeting expectations	vn response: 21/05/2025 at 13:46
l	3. Meeting expectations	
	4. Partially exceeding expectations	
1	5. Exceeding expectations	
Ĩ	Choose a response	•

 Once the external moderation has happened, you can then return to this form to confirm the rating. Confirm you are happy to submit your review and click "Save". This will then appear in the completed section of the Reviews summary page.

This will complete the process and so should not be finalised until the moderation has happened and the final discussions have taken place.

*Final overall performance rating:	0
3. Meeting expectations	•
*Are you happy to submit your review the review is completed by both you an	(please remember to press the SUBMIT button when 1 response A
Yes	•
Training Administrator selecter Yes	ed a drop down response: 21/05/2025 at 13:46
Comments	
Add comment here	

Objective Setting

1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



2. This will take you to this page. Employees can input their own objectives, click on your relevant employee in the left-hand pane to reach their **Employee Summary Page**.

iTrent 21/05/2025 ×									🗖 (DLT
Crganisation		(Training Administrator						
DELT Shared Services Limited	Review summary		Y MENU C 🖶			c	alenda	r	
^ People : Surname → Q +	Insights (Reviews in the last 180 da	ys)		2025	•	Тс	oday		< MAY >
Results 1 Person Select all Save this group	Completed 0	Scheduled 0	In Progress 0	Sun	Mon	Tue	Wed	Thu	Fri Sat
Training Administrator	istrator Overdue ent office 0	Due 0	Abandoned 0					1	2 3
Job title : Project Manag	er			4	5	6	7	8	9 10
Sex : Female Personal ref. : 72141186	s		Filter: Scheduled 👻 Sort: Date earliest 👻	11	12	13	14	15	16 17
Leaver : No	Training Administrator (Pro)	ect Manager) nthly Check in Sessions	Schedule review details	18	19	20	21	22	23 24
Position reference : 31133 Payroll : DELT SHARED SERVICES	Between Training Administrator & Tr Scheduled on 25 Jun 2025	raining Manager	Review details	25	26	27	28	29	30 31
	Training Administrator (Pro) Review name: Delt 2025/26 - Mo Between Training Administrator & Ti Scheduled on 17 Jul 2025	ect Manager) nthly Check-in Sessions raining Manager	Schedule review details Review details	-	•	+ Sche	edule a ne	ov review	•

3. Scroll to links, click "Reviews", then "Objective Overview".

			LINKS	_			
> Personal Inform	> En	ployment	> Holiday	> Sickness	>	Other Absence	
> Time & Expense	es > ESS Qu	estionnaires	> Learning &	& Development	~	Reviews	
8							
Review summary	Schedule a review	View details o	f scheduled revie	w Complete a	a review	Objective ove	ew People > Objective overvie
Objective summany	Talent profile su	mmany Succes	scion notantial de	atails Perform	ance Rati	ng	

4. This will open the **Objective overview** page. Click "+ Add objective".

bjective overview (as of 21/05/2025)					✓ MENU (c 🖶 🛛
Position <aii></aii>	+ Add objective				₹ Fi	lter 🗸 🛓
Title 🗘	Туре 🗘	Status 🗘	Start date 🗘 Co	ompletion date 🗘 Rating 🗘	Objective linked to 🗘	Actions
Trent launch	Team	Completed	21/05/2025	31/03/2026	iTrent launch	0

- 5. Now you can use the following form to create an objective.
 - Always check the **Personal Objective** box.
 - Enter the Title
 - Choose the **Type** of objective
 - Enter the **Description**
 - Enter the **Start date** using the calendar icon.
 - The **completion date** will be the end of the performance year (31st March)
 - You can also set a **priority**.
 - Select the **employee's position** if they have more than one.
 - The **Objective rating** drop-down is there at the end of the year to input the status of the objective.

Click "Save".

Objective details New		c e
Personal objective	2	
Objective title*	I)
Туре*	Corporate objective Development Personal / Individual Strategic Objective	
Attachment date*	21/05/2025	
Description		
Additional information		
Target start date		•
Target completion date		
Start date*		
Completion date		

6. This will now show in the overview. So, when it's time to update at the end of year review, click on the objective and complete the drop-down.

Objective overview (as of 21/05/2025)						✓ MENU (; 🖶 🛛
Position <all></all>	+ Add objective					₹ Fil	ter 👻 🛓
Title 🕈	туре 🗘	Status 🗘	Start date 🗘	Completion date 🗘	Rating 🗘	Objective linked to 🗘	Actions ‡
> ITrent launch	Team	Completed	21/05/2025	31/03/2026		iTrent launch	0
> Training	Team	Completed	21/05/2025	31/03/2026		Training	0

Probation

1. In iTrent, the probation form can also be captured in the system. Navigate to the same **Reviews summary page** from your Manager Dashboard.



2. This will take you to this page. As a line manager, **schedule a new review** and select the **Probation** option from the drop-down.

1 0 21/05/2025 ×			D (DLT-M
anisation		Training Administrator	
ed Services Limited	Review summary	Y MENU C 🖨	Calendar
ple : Sumame Q +	Insights (Reviews in the last 180 days)		2025 • Today < JUN >
Person Save this group	Completed Scheduled Sched	0 In Progress	Sun Mon Tue Wed Thu Fri Sat
ng Administrator	Overdue Due	Abandoned	1 2 3 4 5 6 7
			8 9 10 11 12 13 14
	Reviews	ter: Scheduled 👻 Sort: Date earliest 👻	15 16 17 18 19 20 21
	Training Administrator (Project Manager) Review name: Delt 2025/26 - Monthly Check-in Sessions Between Training Administrator & Training Manager Scheduled on 25 Jun 2025	Schedule review details Review details	22 23 24 25 26 27 28 29 30
	Training Administrator (Project Manager) Review name: Deit 202526 - Monthly Check in Sessions Between Training Administrator & Training Manager Scheduled on 17 jul 2025	Schedule review details Review details	Schedule a magnetice Events - 17 June 2025 Training Administrator Scheduled In progress
	Review name: DELT Probation Test	Schedule review details	Delt 2025/26 - Monthly Check-in Sessions
Schedule re	eview details New	Test V	Y MENU C 🖶
		inest in	
	Position*	~	
	Default reviewer		

- 3. Complete the rest of the form.
 - The **Due by date** will be 6 months from their start date. The **Scheduled date** would be the same. This allows the form to remain active for the whole probation period.
 - Click "Save".

Schedule review details New		✓ MENU C	•
Review name*	DELT Probation Test		
Position*	Project Manager		
Default reviewer	Training Manager		
Override reviewer	D		
Invited		▲ Q Ø	
Contributor		_ Q Ø	
Due by date *			
Scheduled date*			
Scheduled start time			
Scheduled end time			
Location			
Review status			
	Save Delete		

4. You can now find this form in the **Reviews summary**. Click **Review details** to expand and complete.

hsights (Reviews in the last 180	J days)					C	Calendar			
⊘ Completed 0	Scheduled 0	8	In Progress O	2025	•	Ţ	oday		< JUI	ч >
∆ Overdue 0	Due O	È	Abandoned O	Sun	Mon	Tue	Wed	Thu	Fri	Sat
		_		1	2	3	4	5	6	7
Reviews	b	Filter: Scheduled	✓ Sort: Date earliest ▼	8	9	10	11	12	13	14
Training Administrator	(Project Manager)	(Schedule review details	15	16	17	18	19	20	21
Between Training Administrato Scheduled on 25 Jun 2025	r & Training Manager	(Review details	22	23	24	25	26	27	28
Training Administrator Review name: Delt 2025/26 Between Training Administrato Scheduled on 17 Jul 2025	(Project Manager) - Monthly Check-in Sessions r & Training Manager	(Schedule review details Review details	29	30	+ sch	edule a n	ew review		
				Event	s - 17 Ju	ine 202	5			

5. The first meeting will be at the 1 month point which you can input the date for here. You can also use this space to outline what expectations there are to be met in this probation period and what training is available.

Click "**Save**". You can review this form at each probation point where both employee and manager can input their comments/feedback.

Narrative	^
This form is intended to support managers and employees in line with the Managing Probation polic The form should be used to both guide and record a series of probationary meetings as summarised the table below. Full details on the process can be found in the Managing Probation policy.	y. Lin
Talking points Talent profile summary	
Talking points	^
1st Meeting Date: (dd/mm/yyyy)	
Equality and Diversity Training Completed? (dd/mm/yyyy)	
Display Screen Equipment Training Completed? (dd/mm/yyyy)	
•	
Objectives/standards to be met during the probation period:	
Add response here	

- 6. All three probation points (1 month, 3 months, 6 months) are in this form. Simply, return to the form at each point to input comments/feedback and to confirm where mandatory training has been completed.
- 7. At the end of the probation, you can give an overview summary and confirm whether the employee has demonstrated satisfactory performance over the probation period.

If you need to prolong the probation, please contact HR.

er back to the objectives set at the initial Induction Meeting, or any im econd review meetings, as well as provide an overall summary of perf	nprovement objectives set formance)
here	
ments:	
is: ing training/support requirements)	
here	
ou have demonstrated a satisfactory level of performance throughou	ut the probationary
completed the relevant mandatory training.	at the probationary
completed the relevant mandatory training.	it the probation

8. Confirm if the completion of the probation is linked to a salary uplift.

Choose a response	•	
Choose a response		
No		^
Yes		

- 9. If you and the employee are happy that they have passed their probation period, click "**Save**". HR will be notified, and an official correspondence will be sent to the employee to confirm that they have passed their probation period.
- 10. Finish by submitting the review. This will then sit in the **Review summary** if you need to refer back.

Submit review
Are you sure you want to submit? Once submitted you will not be able to edit the review
Review summary Schedule a review View details of scheduled review Complete a review Objective overview Objective summary Talent profile summary Succession potential details Performance Rating
DELT Probation Test
1 November 2025 Between Training Administrator & Training Manager
Position: Project Manager
Status: in progress
Narrative
This form is intended to support managers and employees in line with the Managing Probation policy. The form should be used to both guide and record a series of probationary meetings as summarised in the table below. Full details on the process can be found in the Managing Probation policy.
Talking points Talent profile summary
Talking points