

## **Employee Guide – Performance Reviews**

This is your guide for completing performance reviews. This step-by-step guide will walk you through how to:

- **Schedule a Monthly Check-In or Final Performance Review**
- **Complete your Check-In form through the employee portal**

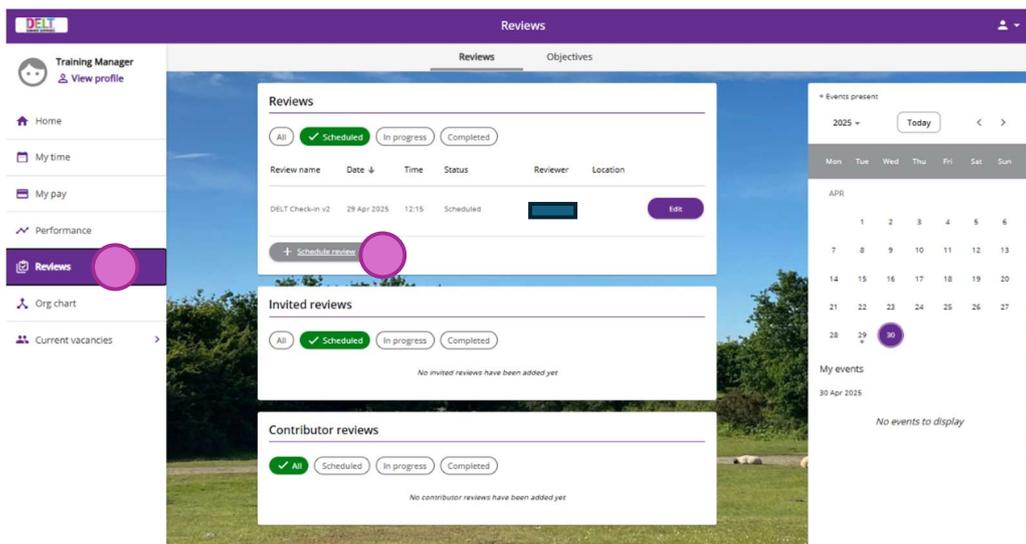
Screenshots will help guide you at every step, so you can complete your reviews smoothly and confidently.

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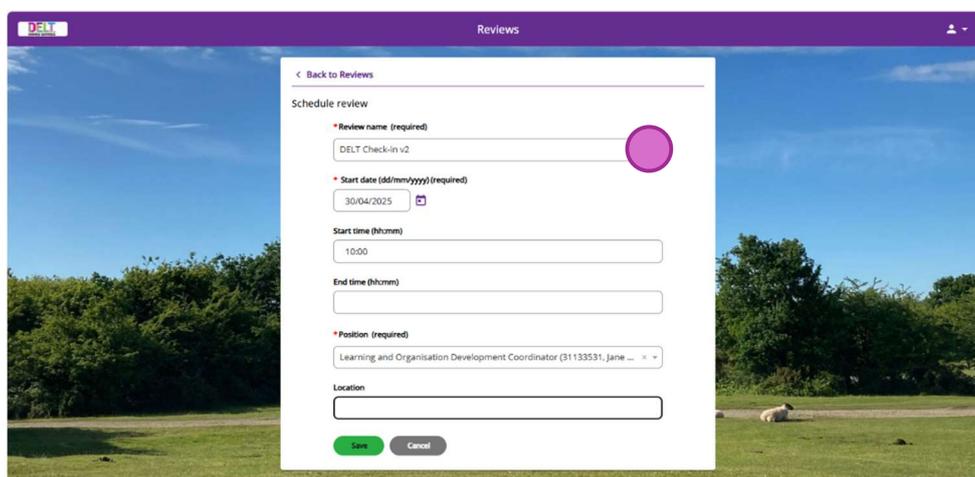
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## Scheduling a Review

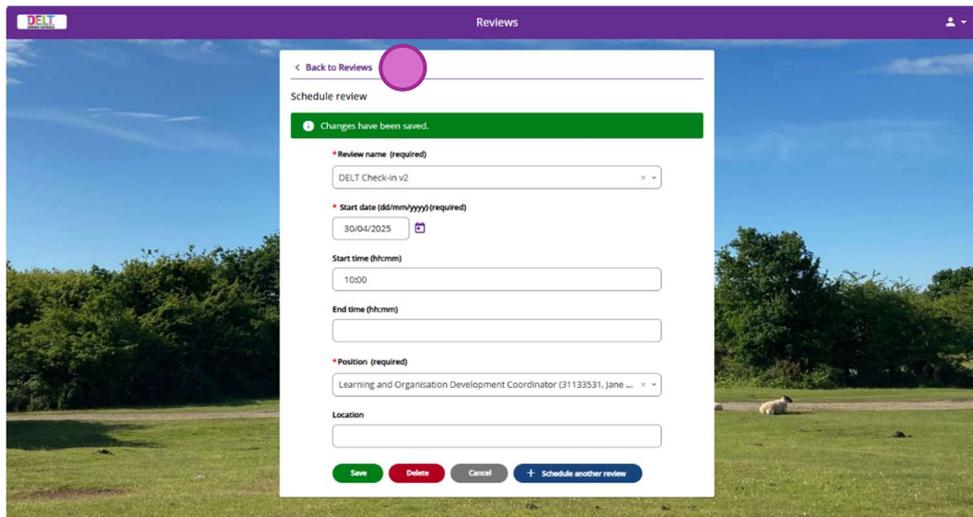
1. From your Employee Dashboard, navigate to **Reviews** in the left-hand menu.
  - This will take you to your **Reviews Dashboard**, where you can see all reviews (Scheduled, In Progress, and Completed). You can also access your **Objectives** at the top of the page.
  - To fill in a Performance Review Check-In, you must first schedule your review. To do this, click **“Schedule review”**.



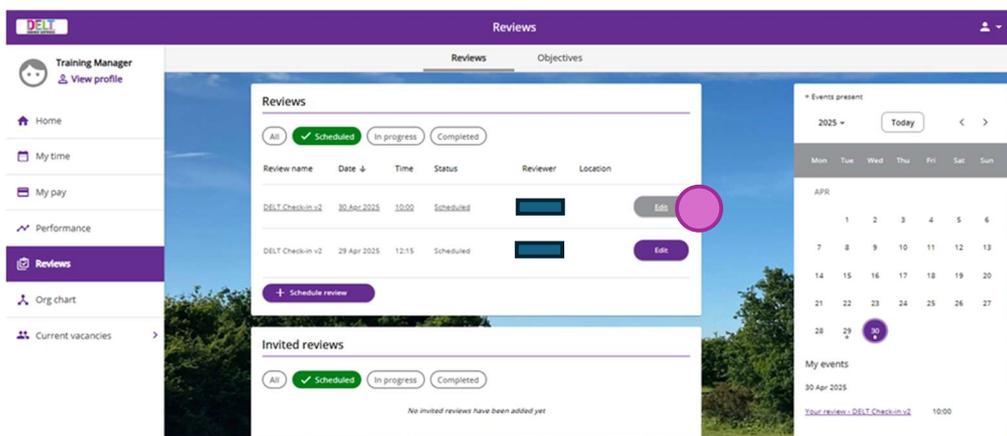
2. After clicking **“Schedule review”**, the scheduling form will open. Use the drop-down menu to select either the **Check-In**, or the **Final Performance Review** option. For this example, select the Check-In option. The Final Performance Review only takes place once at the end of the financial year.
  - Ensure you choose the correct start date and time, and select the appropriate role if you have more than one. Click **“Save”** to continue.



- Once you have saved your changes, a confirmation bar will appear. At this stage, you may delete or cancel the review or schedule another one using the buttons at the bottom of the form. If you're happy with the details, click “< **Back to Reviews**” to return to the Reviews Dashboard.

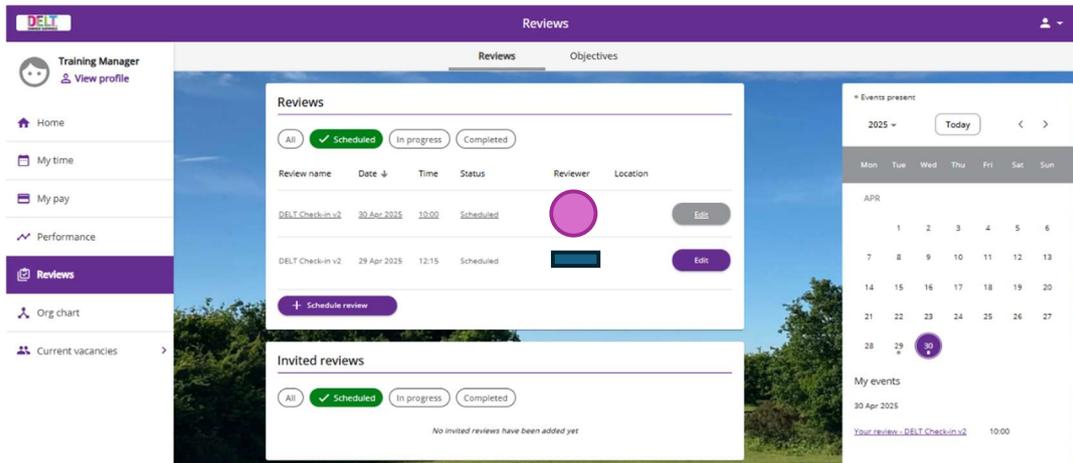


- You are now back on the Reviews Dashboard. You will now see your scheduled reviews in the **Reviews** section.
  - You can filter Reviews by **Scheduled**, **In Progress**, or **Completed**.
  - To edit a scheduled review (e.g. change the time or date), click the “**Edit**” button.
  - This brings us to the next step – submitting and completing your Check-In. (See the following section of this guide.)

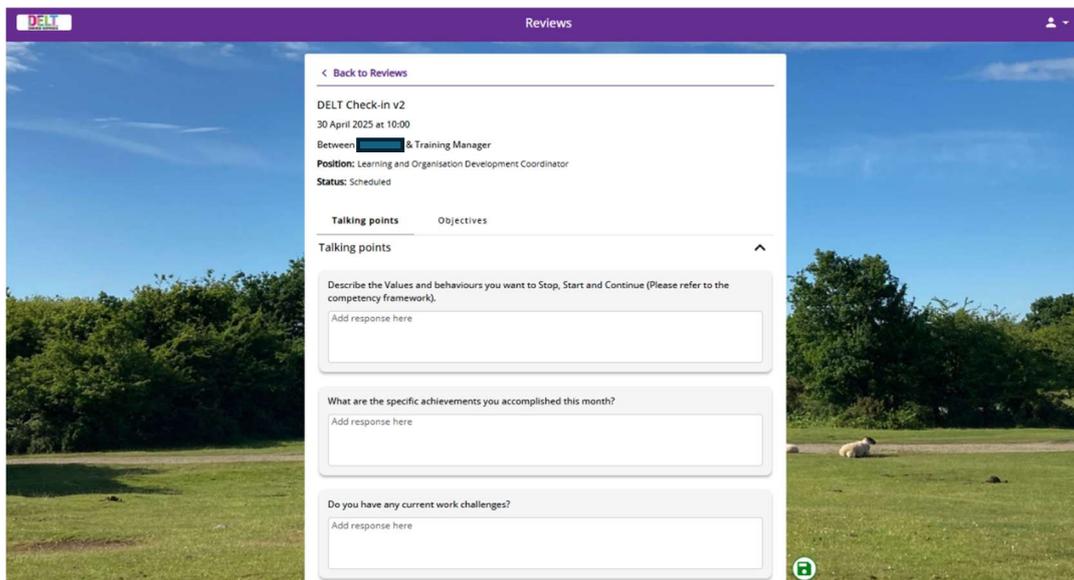


## Completing a Check-In

1. From the Reviews Dashboard (accessible via **Reviews** on the left-hand menu of your home dashboard), you can complete your Performance Review Check-In by selecting the appropriate scheduled review. (Refer to the steps above.)
  - To access the Check-In form, select and click on the relevant review.



2. This will open the Check-In form for you to complete.



3. You will have the option to add any attachments to support your Check-In and to add any comments. Once you are satisfied, click “**Save**”.

The screenshot shows a web interface titled "Reviews" with a purple header. The main content area is a form with the following sections:

- What do you need support in?**: A text input field with the placeholder "Add response here".
- How is your personal physical or mental wellbeing? Do you need any additional support to help you manage your work/life balance?**: A text input field with the placeholder "Add response here".
- Comments**: A text input field with the placeholder "Add comment here" and an "Add comment" button to its right.
- Attachments**: A section with a "+ Add attachment" button and the text "No attachments have been added".
- Save/Cancel**: At the bottom, there are "Save" and "Cancel" buttons. A pink circle highlights the "Save" button.

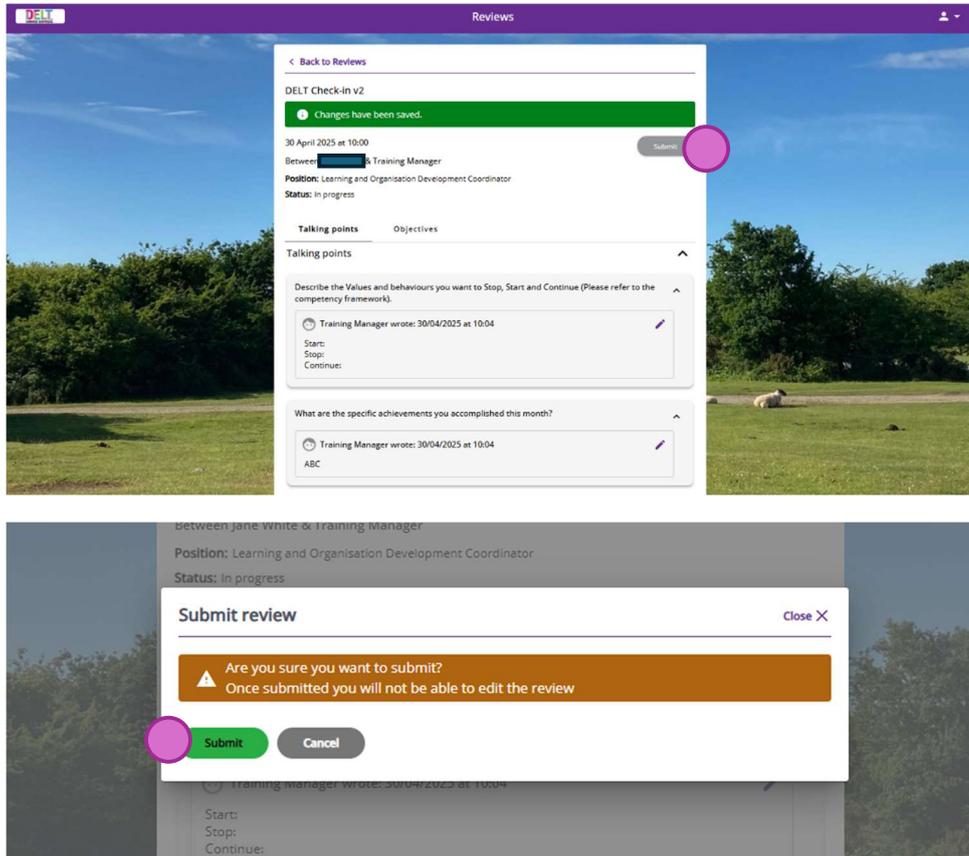
4. You can also review any saved **Objectives** via the **Objectives** tab. If you wish to add an objective, click the corresponding button to do so.

The screenshot shows the "Reviews" interface with a modal window open. The modal has a title bar with a back arrow and "Back to Reviews". The content includes:

- DELT Check-In v2**
- 30 April 2025 at 10:00**
- Between:** [Redacted] Training Manager
- Position:** Learning and Organisation Development Coordinator
- Status:** Scheduled
- Talking points** and **Objectives** tabs. The "Objectives" tab is active, showing "There are no objectives in the current filter" and an "Add objective" button.
- Sort:** A dropdown menu set to "Newest - oldest".
- Attachments**: A "+ Add attachment" button and the text "No attachments have been added".
- Save/Cancel**: "Save" and "Cancel" buttons at the bottom.

- Once you are completely satisfied with your Check-In, click **“Submit”** to send it to your line manager.

**Please note:** Once submitted, you will no longer be able to make changes.



- Return to the Reviews Dashboard by clicking **“< Back to Reviews”** to view your review under the **In Progress** filter. Once it has been approved by your line manager, it will move to the **Completed** section.

You can continue to manage and view your reviews by accessing the Reviews Dashboard from your home dashboard, as described in the initial steps.

