## **Employee Guide – Performance Reviews**

This is your guide for completing performance reviews. This step-bystep 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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## **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".**

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	G	30 Apr 2025	
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- 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.

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	Learning and Organisation Development Coordinator (31133531, Jane × +	Marshell in the second
	Save Cancel	and the second

3. 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.

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- 4. 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.)

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## **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.)

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• 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.

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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".** 

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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.



5. 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.

6. 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.

All Scheduled	d 🗸 In prog	ress Co	mpleted		
Review name 🛧	Date 🕹	Time	Status	Reviewer	Location
DELT Check-in v2	30 Apr 2025	10:00	In progress		