

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**
- **Complete your Check-In form through the employee portal**
- **How to navigate the Final End-of-Year Performance Review**

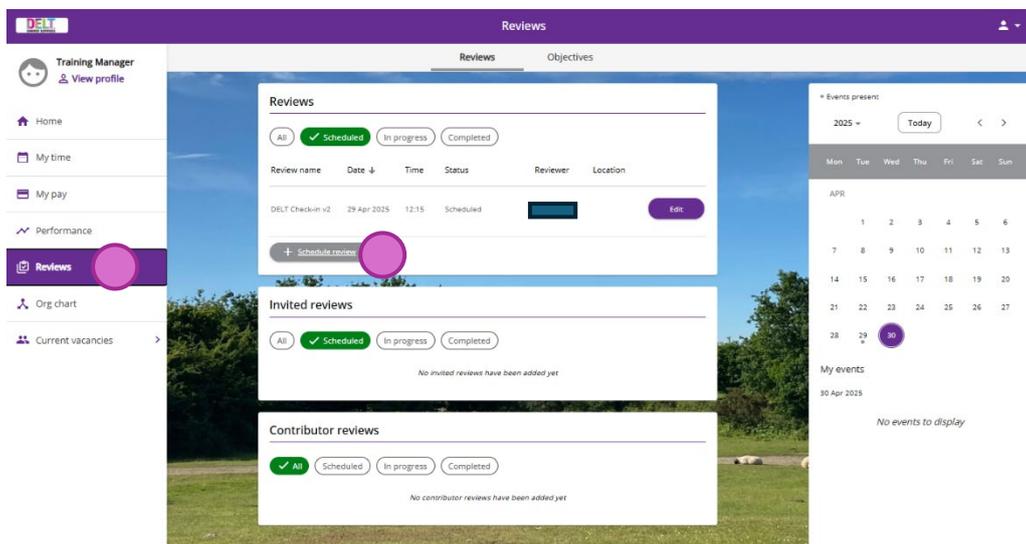
Screenshots will help guide you at every step, so you can complete your reviews smoothly and confidently.

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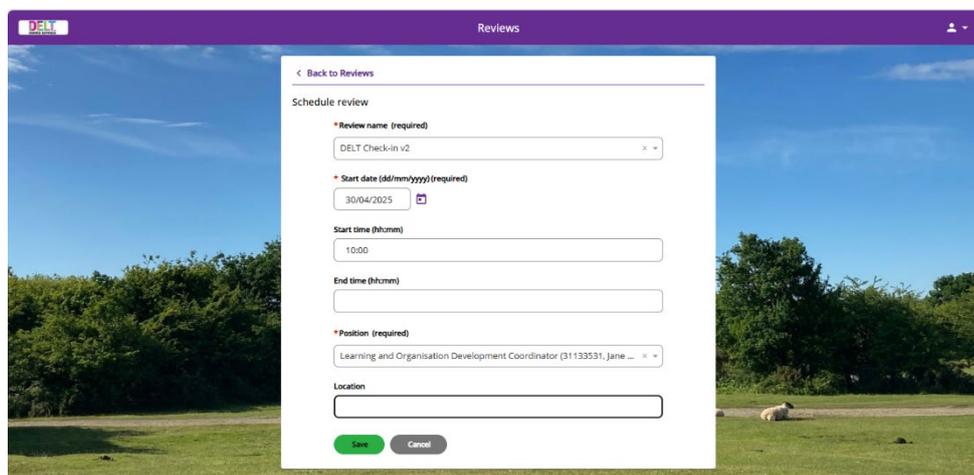
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Scheduling a Review

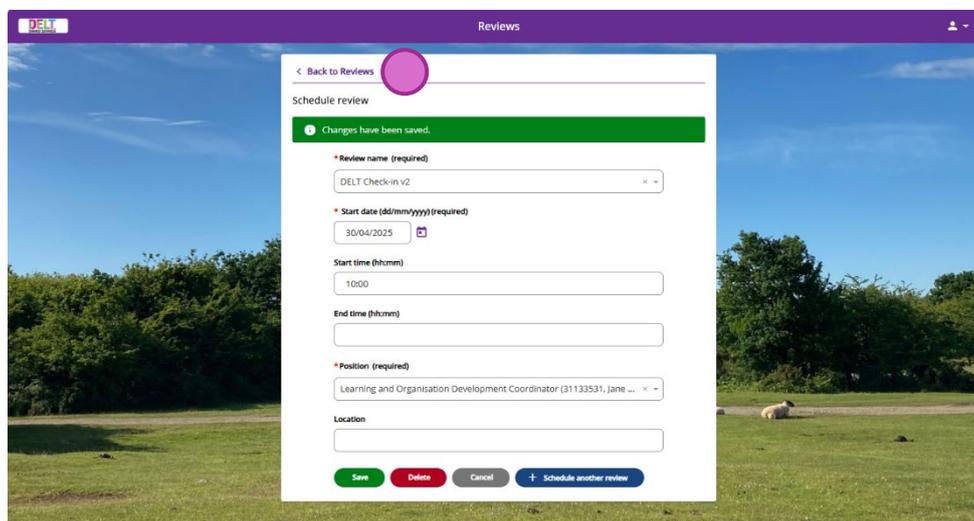
1. From your Employee Dashboard, navigate to **Reviews** in the left-hand menu.
 - This will take you to your **Reviews Dashboard**, where you can see all reviews (Scheduled, In Progress, and Completed). You can also access your **Objectives** at the top of the page.
 - To fill in a Performance Review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



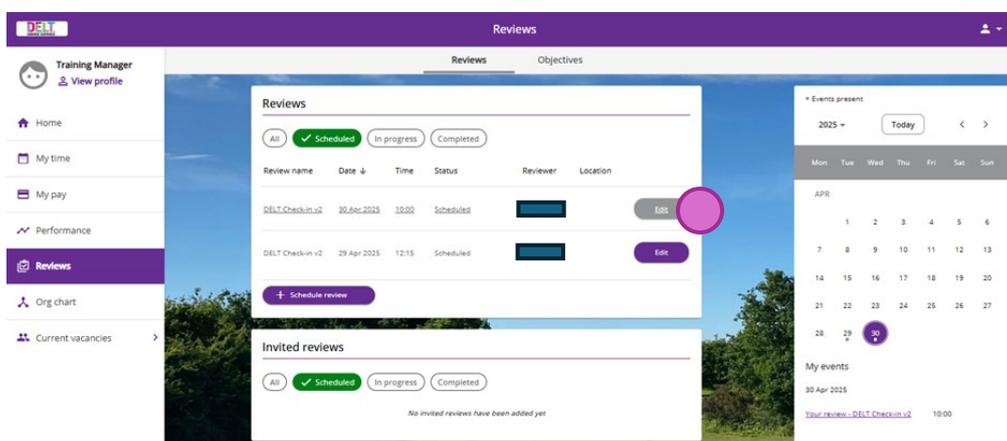
2. After clicking **“Schedule review”**, the scheduling form will open. Use the drop-down menu to select either the **Check-In**, or the **Final Performance Review** option. For this example, select the Check-In option. The Final Performance Review only takes place once at the end of the financial year.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



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.

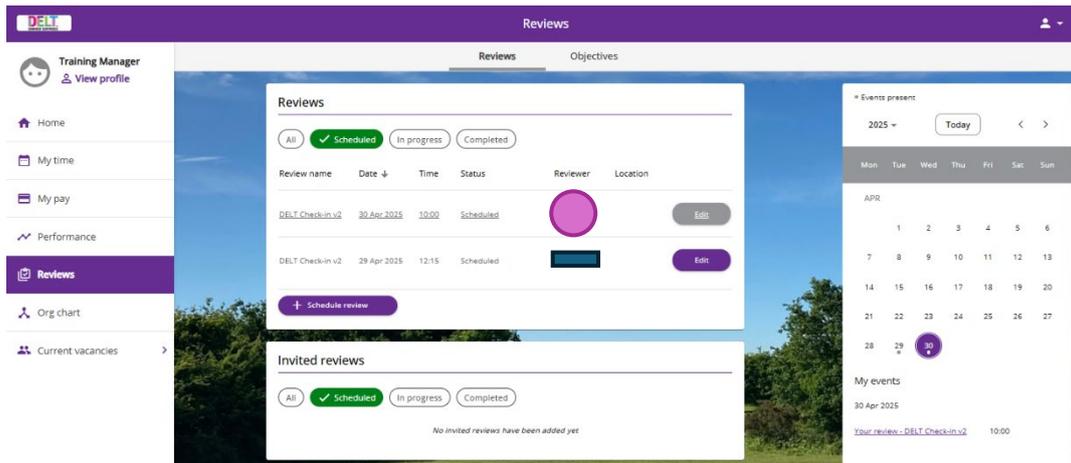


4. You are now back on the Reviews Dashboard. You will now see your scheduled reviews in the **Reviews** section.
- You can filter Reviews by **Scheduled**, **In Progress**, or **Completed**.
 - To edit a scheduled review (e.g. change the time or date), click the “**Edit**” button.
 - This brings us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

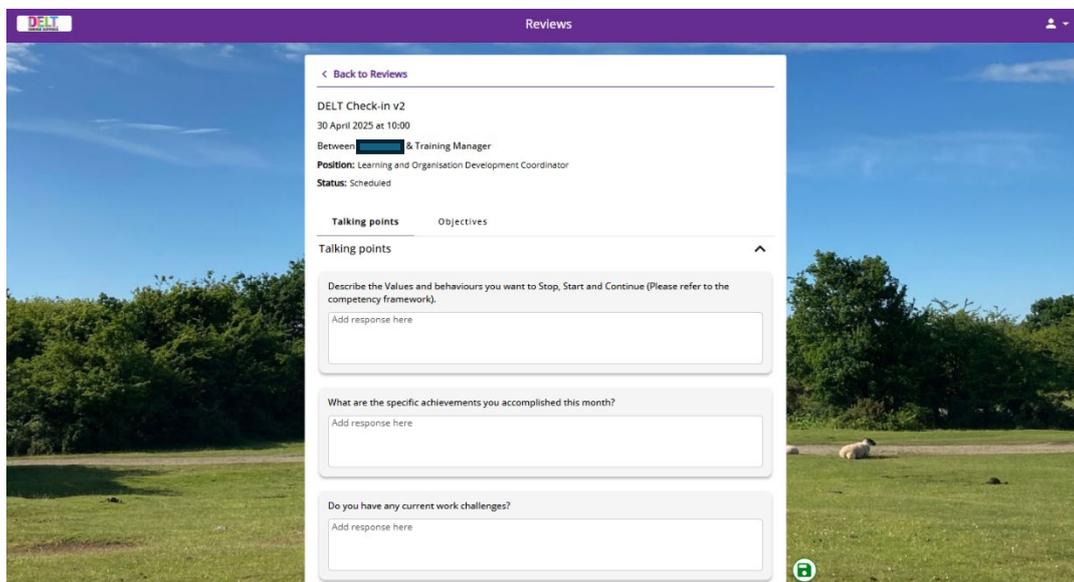


Completing a Check-In

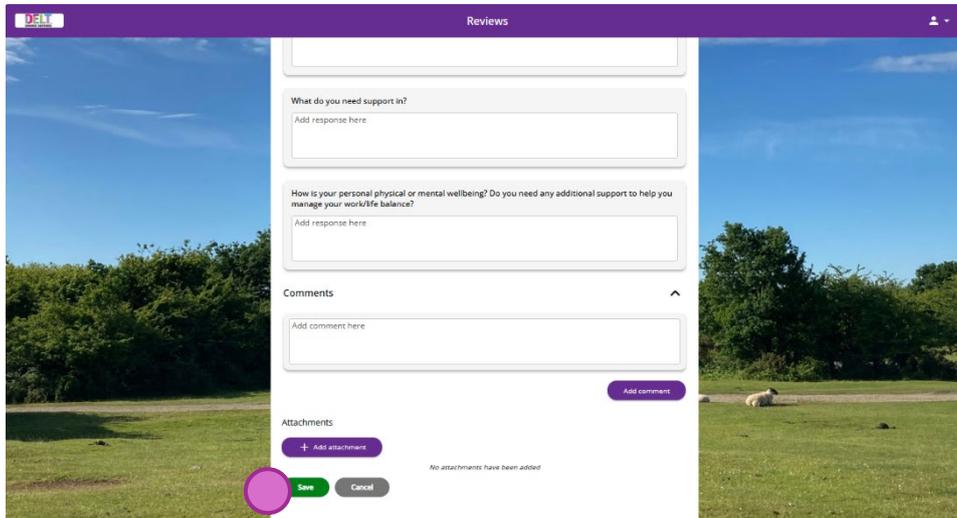
1. From the Reviews Dashboard (accessible via **Reviews** on the left-hand menu of your home dashboard), you can complete your Performance Review Check-In by selecting the appropriate scheduled review. (Refer to the steps above.)
 - To access the Check-In form, select and click on the relevant review.



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

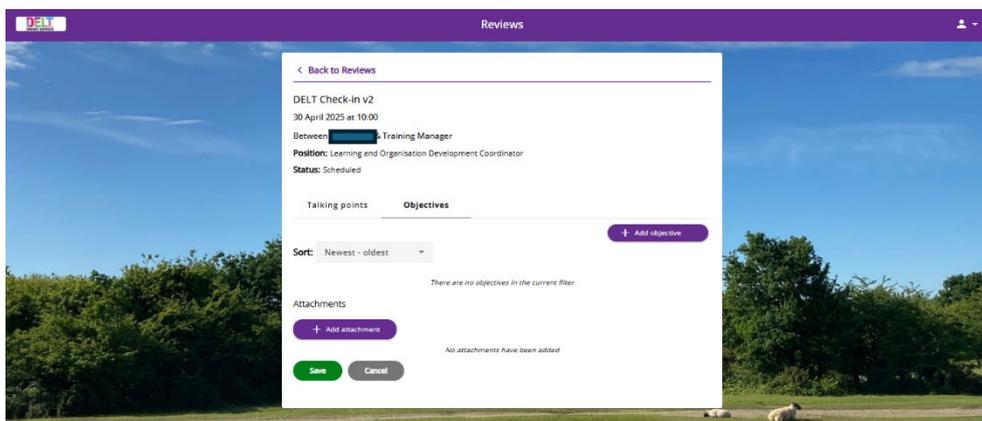


3. You will have the option to add any attachments to support your Check-In and to add any comments. Once you are satisfied, click “**Save**”.



The screenshot shows a mobile application interface for 'Reviews'. At the top, there is a purple header with the 'DELT' logo on the left and a user profile icon on the right. The main content area is a white form with a purple border. It contains three text input fields: the first is labeled 'What do you need support in?' with a placeholder 'Add response here'; the second is labeled 'How is your personal physical or mental wellbeing? Do you need any additional support to help you manage your work/life balance?' with a placeholder 'Add response here'; and the third is labeled 'Comments' with a placeholder 'Add comment here'. Below these is an 'Attachments' section with a purple '+ Add attachment' button and the text 'No attachments have been added'. At the bottom of the form are two buttons: a green 'Save' button and a grey 'Cancel' button. A purple circle highlights the 'Save' button. The background of the app is a landscape photo of a green field under a blue sky.

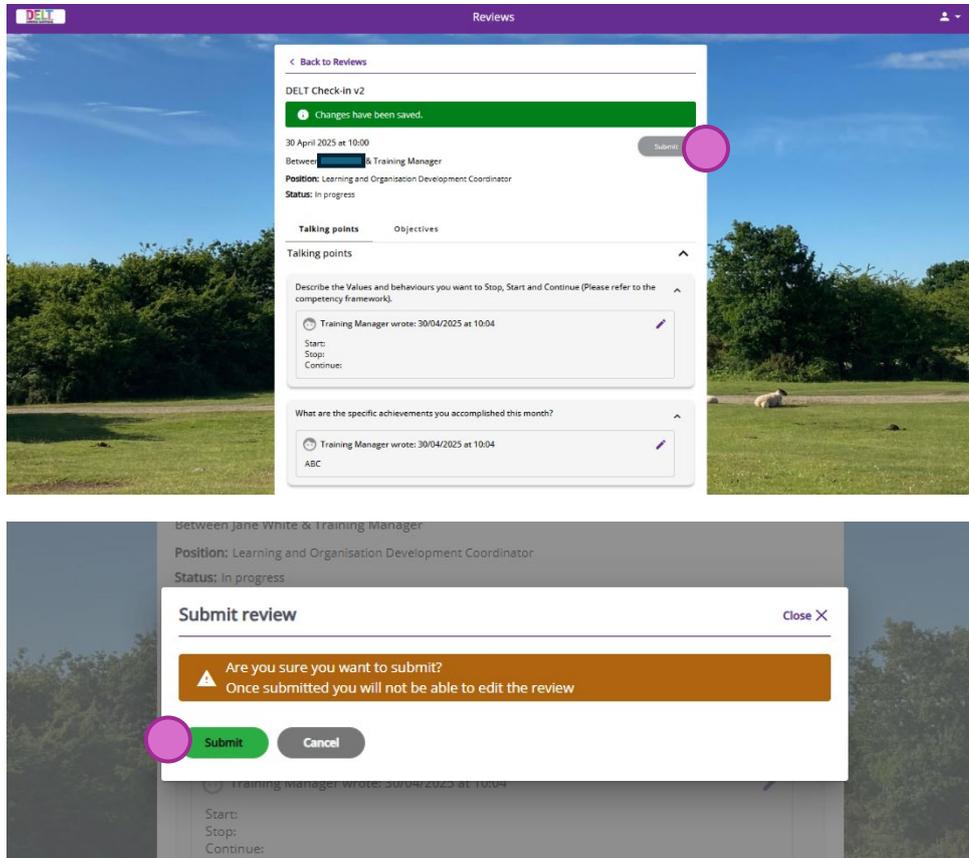
4. You can also review any saved **Objectives** via the **Objectives** tab. If you wish to add an objective, click the corresponding button to do so.



The screenshot shows the same mobile application interface, but with the 'Objectives' tab selected. The form now displays a 'Back to Reviews' link at the top left. Below it, the following information is shown: 'DELT Check-in v2', '30 April 2025 at 10:00', 'Between [redacted] & Training Manager', 'Position: Learning and Organisation Development Coordinator', and 'Status: Scheduled'. There are two tabs: 'Talking points' and 'Objectives', with 'Objectives' being the active tab. Below the tabs is a purple '+ Add objective' button. A 'Sort' dropdown menu is set to 'Newest - oldest'. Below that, it says 'There are no objectives in the current filter'. At the bottom, there is a purple '+ Add attachment' button and the text 'No attachments have been added'. The 'Save' and 'Cancel' buttons are also present. The background is the same landscape photo.

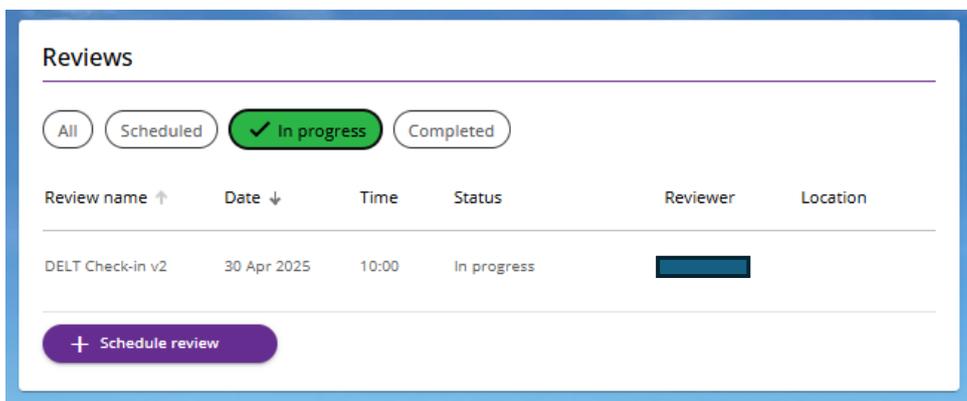
- Once you are completely satisfied with your Check-In, click **“Submit”** to send it to your line manager.

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.

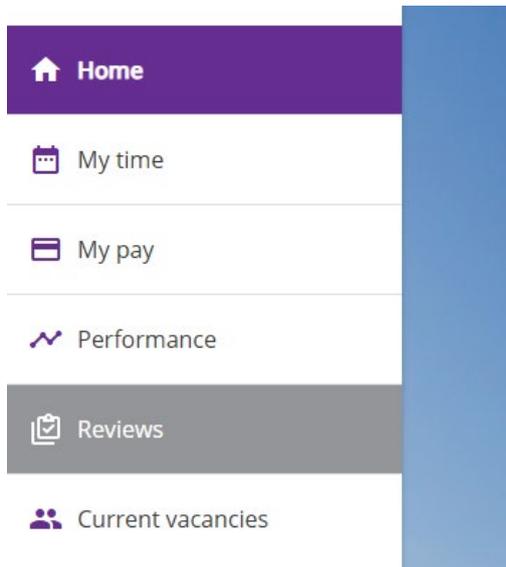
You can continue to manage and view your reviews by accessing the Reviews Dashboard from your home dashboard, as described in the initial steps.



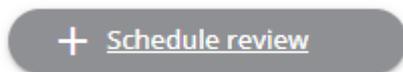
Final Performance Review

It's the end of the performance review cycle! Follow the steps below to complete your End-of-Year Review.

1. Log into iTrent and go to **Reviews** in your left-hand menu pane.

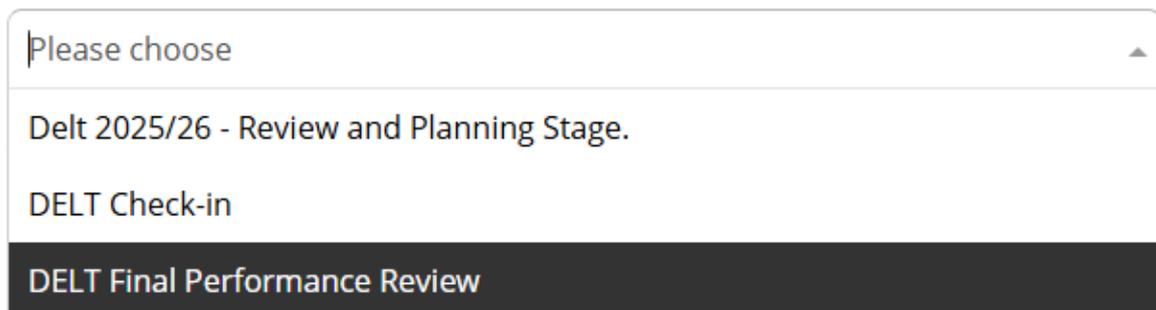


2. Click on **Schedule review**.



3. Select **Delt Final Performance Review** from the drop-down menu.

***Review name (required)**

A screenshot of a drop-down menu. The text inside the menu is: 'Please choose', 'Delt 2025/26 - Review and Planning Stage.', 'DELT Check-in', and 'DELT Final Performance Review'. The 'DELT Final Performance Review' option is highlighted with a dark background.

4. Enter the **date and time** of your review meeting. Don't forget to send a separate calendar invite to your line manager to confirm the meeting. Click **Save**.

* Start date (dd/mm/yyyy) (required)

27/03/2026 

Start time (hh:mm)

15:00

End time (hh:mm)

15:30

* Position (required)

Marketing and Communications Assistant  (... x ▾)

Location

[Save](#) [Cancel](#)

5. Return to the **Reviews** section by clicking **Back to Reviews**.

[← Back to Reviews](#)

6. Click on **Delt Final Performance Review** to open your form.

Reviews

[All](#) [✓ Scheduled](#) [In progress](#) [Completed](#)

Review name	Date ↓	Time	Status	Reviewer	Location
DELT Final Performance Review	27 Mar 2026	15:00	Scheduled		Edit

7. This form must be completed before your meeting with your line manager, and this is where you will outline your key points for your performance review. Use it to prepare and outline your key discussion points.

You will need to:

- Rate yourself against each value.
- Provide an overall performance rating for the year.

- Add supporting comments where appropriate.
- Upload any relevant attachments (optional).

Once complete, click **Save**.

[< Back to Reviews](#)

DELT Final Performance Review

Friday 27 March 2026 at 15:00

Between [REDACTED]

Position: [REDACTED]

Status: Scheduled

Narrative ^

Performance Management is important to us at Delt because we believe that the development and growth of our employees is critical to our success. The Performance Management process is designed to support leaders and employees participate in ongoing coaching and feedback that ensure employees know what is expected of them, how they are performing and what can be done to strengthen their performance.

Please refer to our [Performance Management Guidelines](#) as a comprehensive resource to help you get the most out of your performance and career development.

Talking points Objectives

Talking points ^

* Describe performance against core job responsibilities, key performance indicators (KPIs), demonstration of our values, and objectives set (required)

Add response here

* Partnership and Collaboration: We believe in partnership and collaboration. (required)

Leading/teaching Living Not living

* Develop and Empower: We develop and empower our people. (required)

Leading/teaching Living Not living

* Integrity and Transparency: We have Integrity and Transparency. (required)

Leading/teaching Living Not living

* Employee overall performance rating: (required)

Choose a response

Manager overall performance rating:

Final overall performance rating:



Important Notes on Submission:

- Your rating is **not final** until it has gone through **formal moderation**.
- Do not finalise or submit your review until:
 - Moderation has been completed, and
 - Your final end-of-year rating has been confirmed.