

MANAGER GUIDE

Performance Reviews

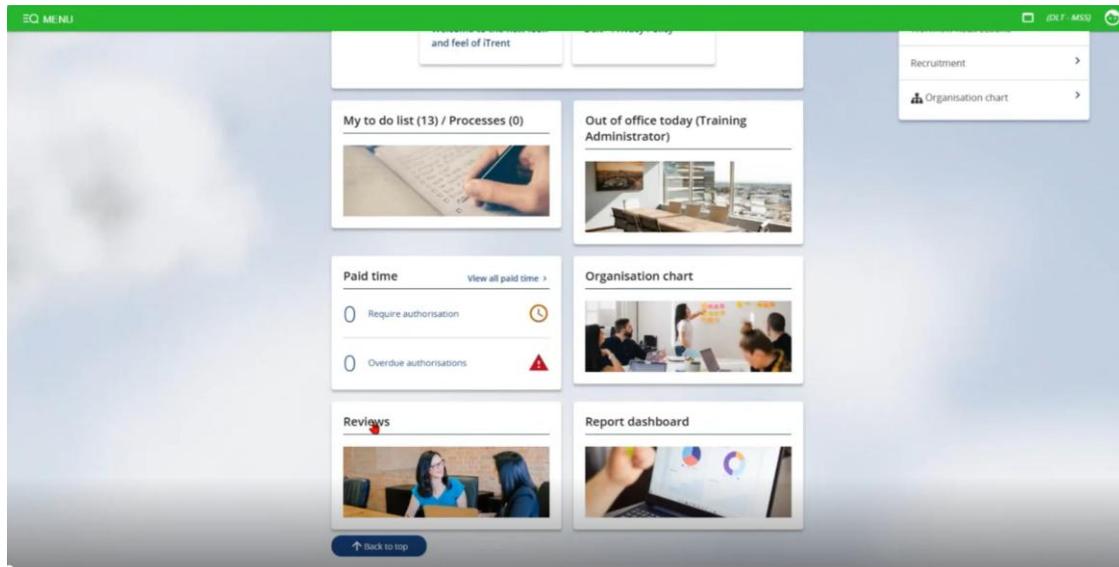
This guide provides a step-by-step overview for line managers on how to schedule, manage, and complete employee performance reviews using the iTrent system. It covers all key review types including Final Performance Reviews, Monthly Check-ins, Review and Planning stages, Objective Setting, and Probation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

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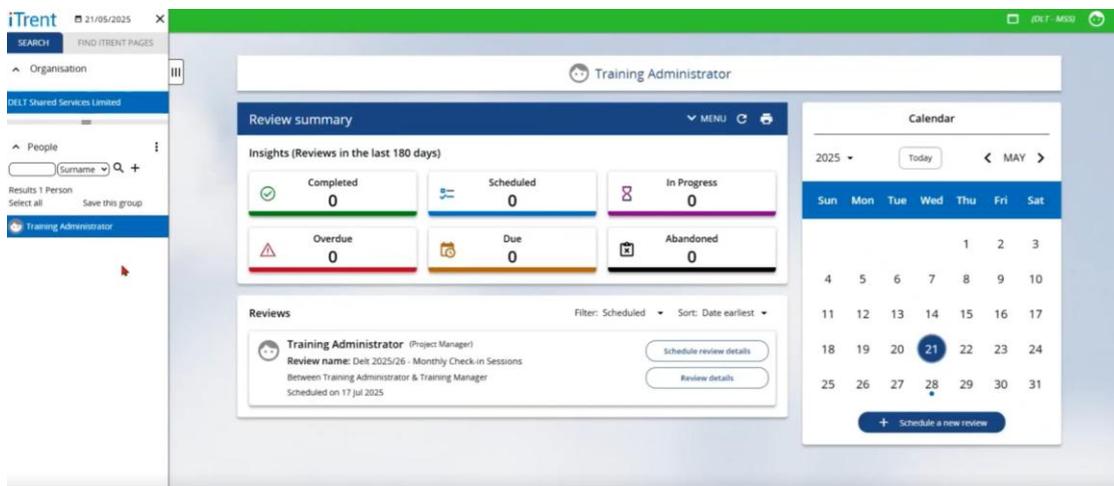
Reviews

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

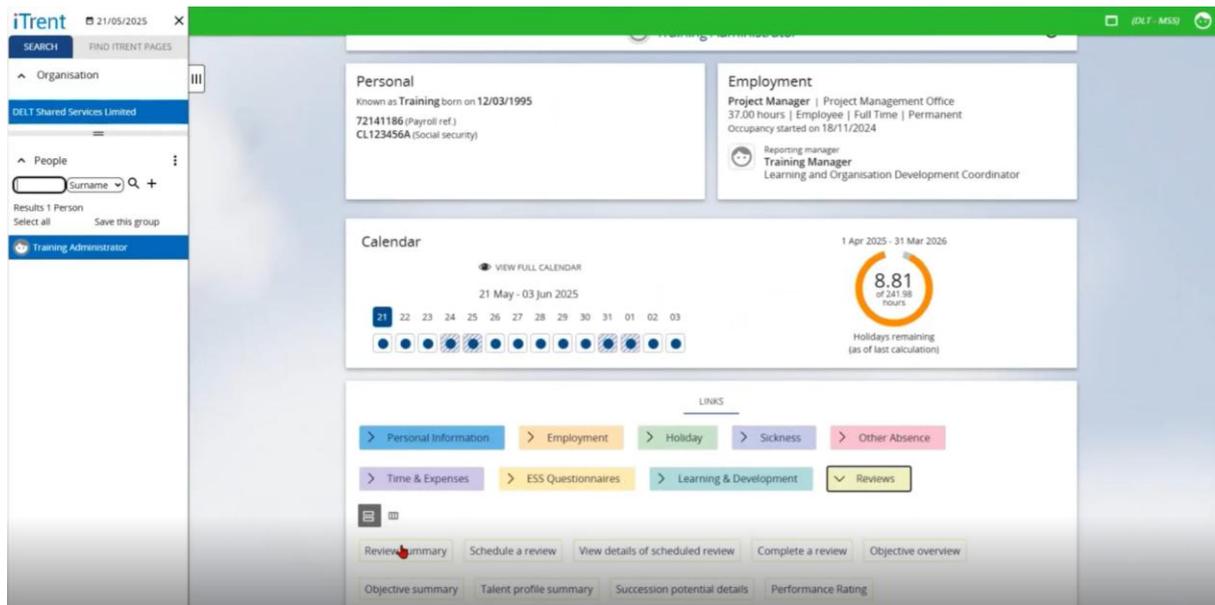


2. This will take you to your **Review summary**. This will show you any reviews that have been completed, scheduled and in progress.

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**.

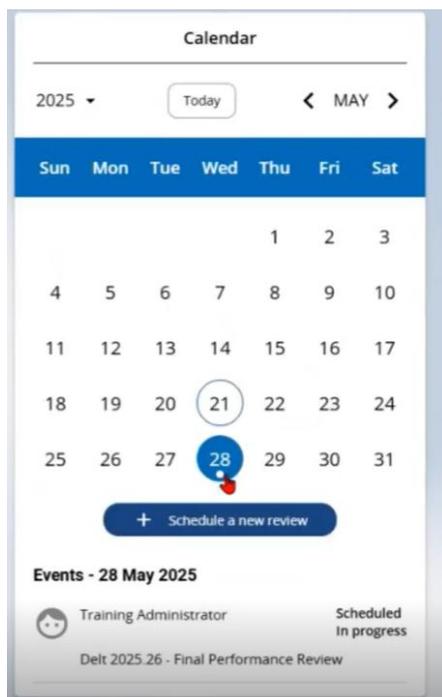


3. From here, you can return to the **Review summary** by scrolling down to links, clicking **Reviews**, then **Review summary**.



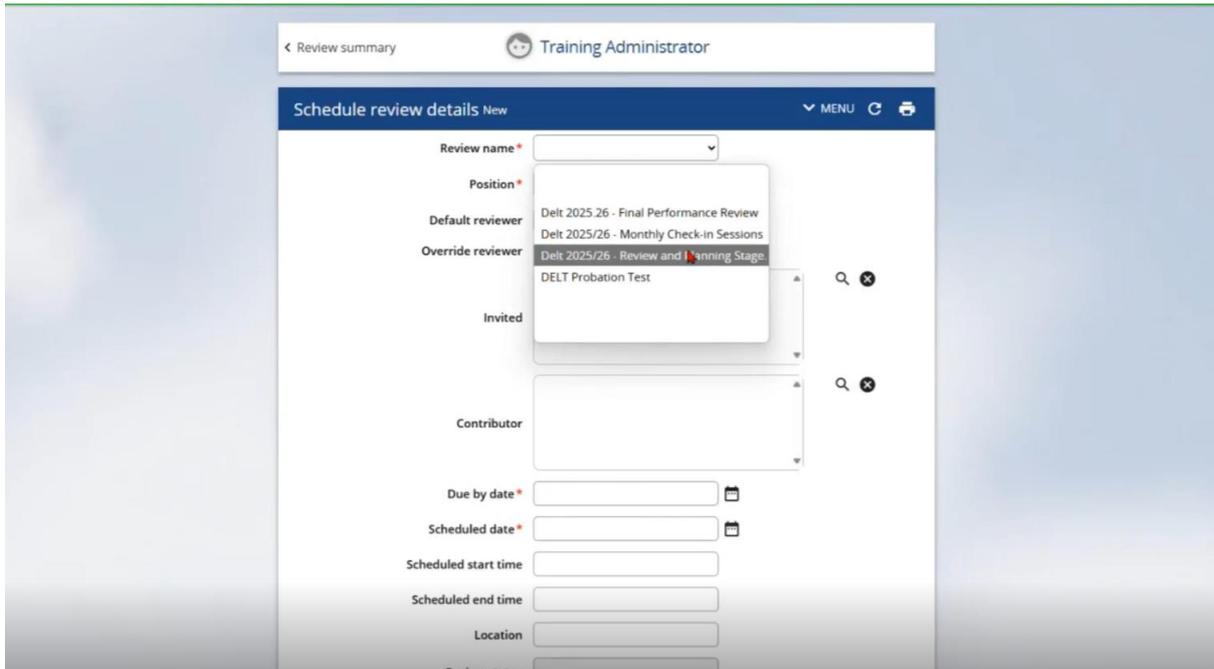
4. You can also use the calendar to see when you have reviews scheduled for your team members.

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**.

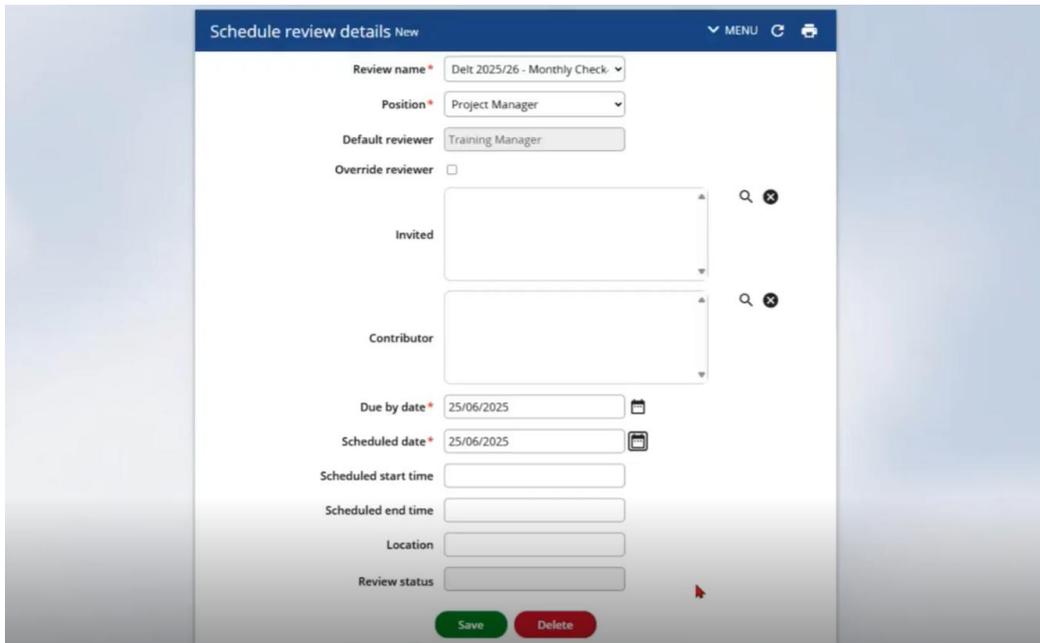
Your employee can be scheduling these reviews themselves as per the Employee guide, *Performance Reviews*, but as a line manager you can also do this on their behalf.



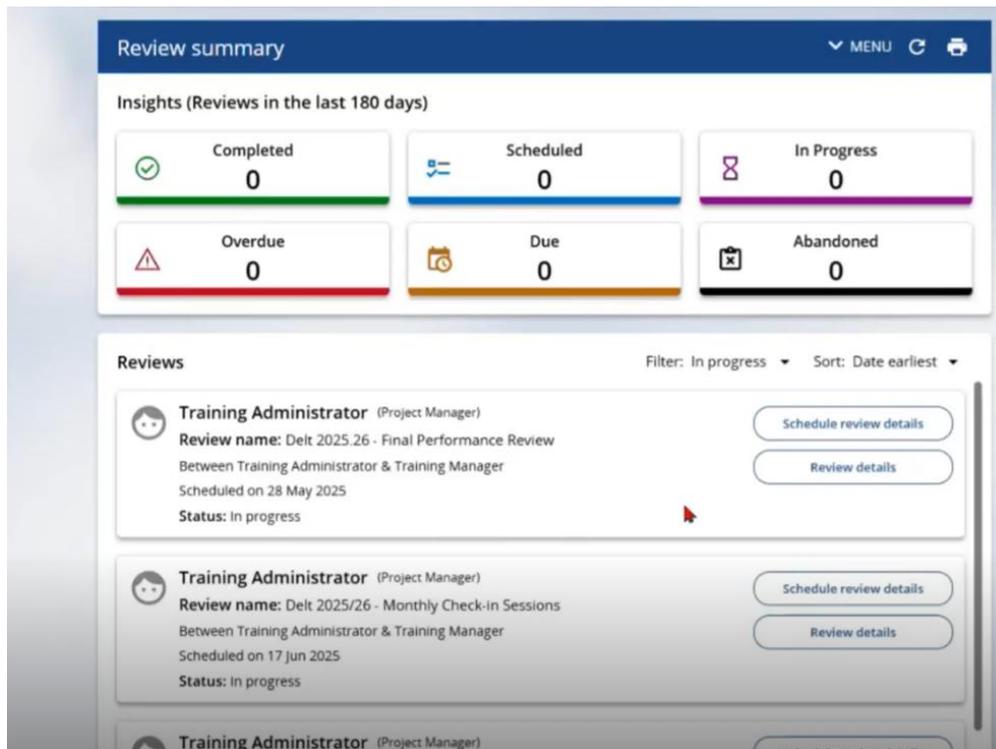
6. Complete the form, including which type of review you would like to schedule, the position of the employee, the due by date and the scheduled date. You will not need to worry about the invited sections unless your employee shares a line manager who needs to be present at the meeting.

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

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

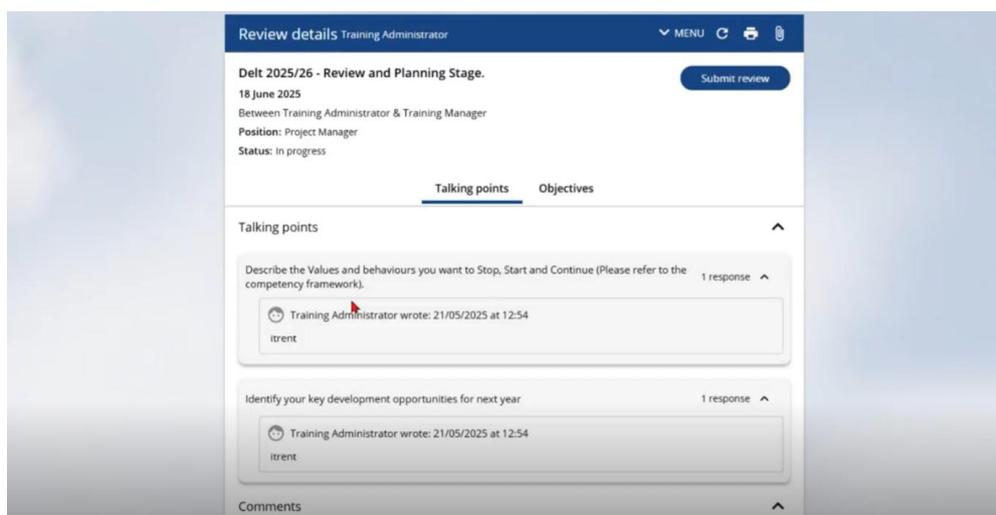


7. You can see the review summary from this page. Here you can see which reviews are in progress by the employee and which they have started to populate.



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”**.



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. Submit **Review**

18 June 2025
Between Training Administrator & Training Manager
Position: Project Manager
Status: In progress

Talking points Objectives

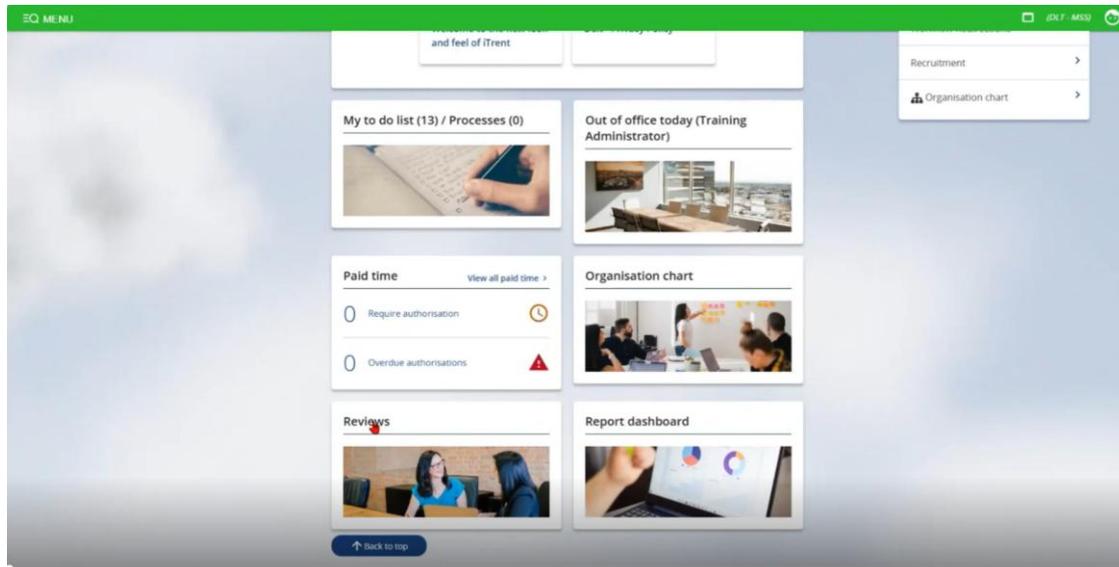
Talking points ^

Describe the Values and behaviours you want to Stop, Start and Continue (Please refer to the competency framework). 1 response ^

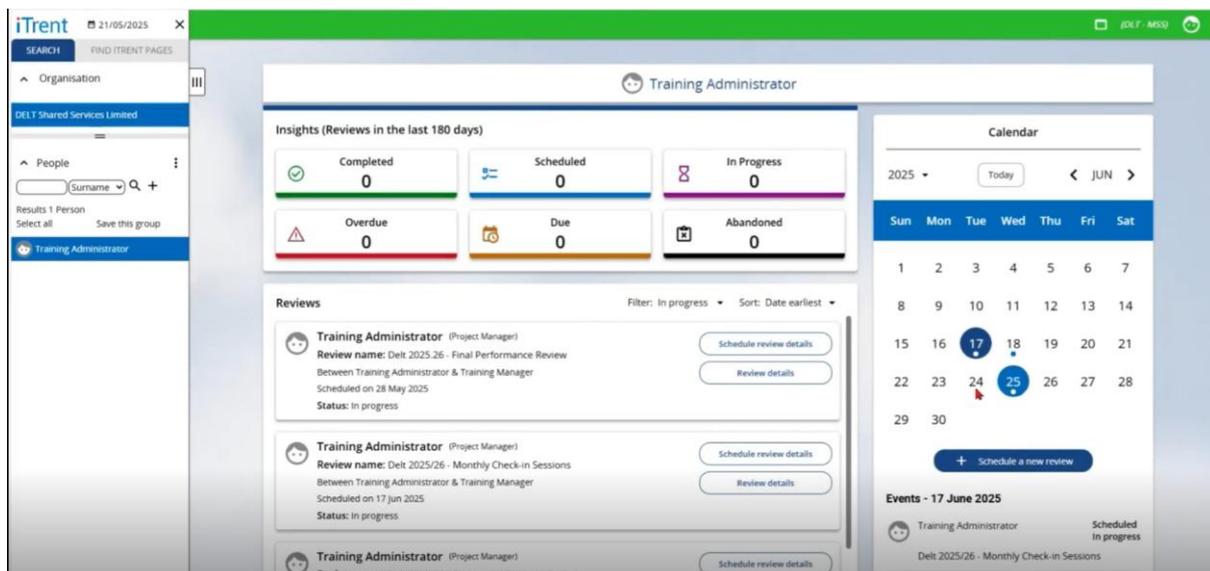
Training Administrator wrote: 21/05/2025 at 12:54
itrent

Monthly check-ins

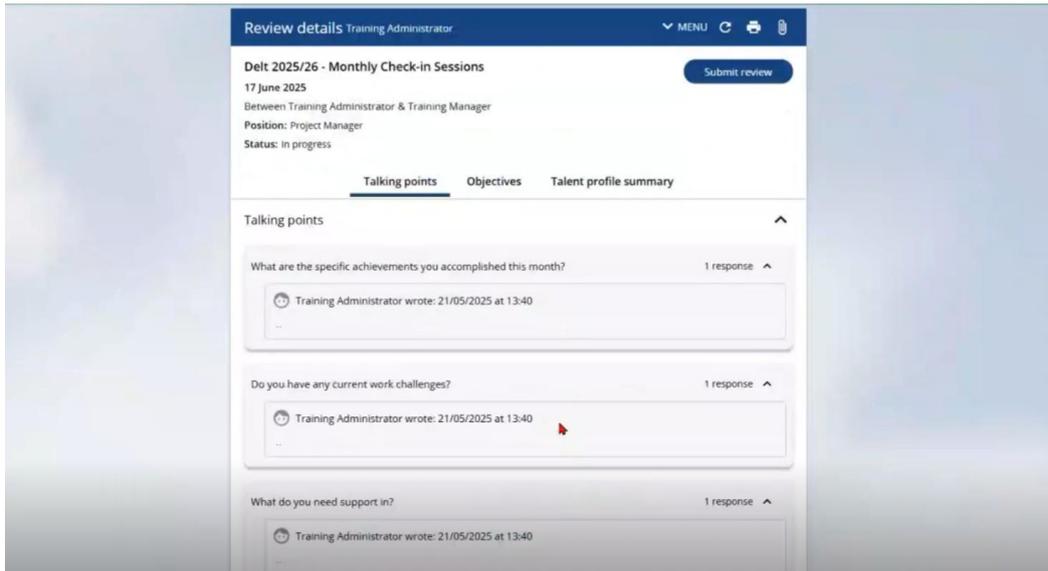
1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



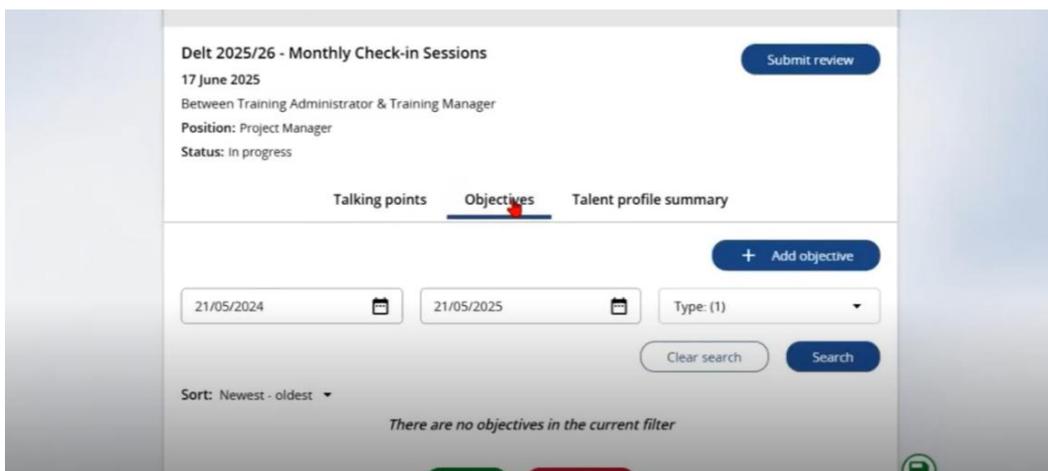
2. This will take you to this page. Follow the instructions from the first section of this guide to schedule a monthly review. Once scheduled, under the **Reviews** on the summary page, select **Review details** on the **Monthly Check-in Session**.



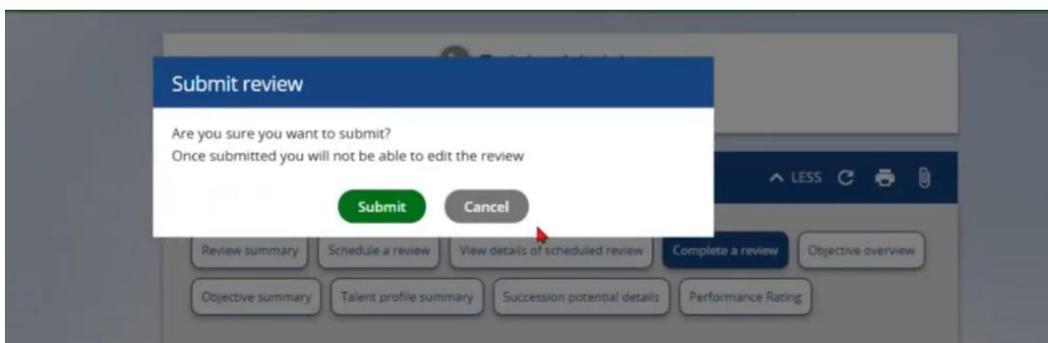
3. This is where you can see what the employee has pre-populated. Scroll to add your comments to the comments box. Click **“Save”**.



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.



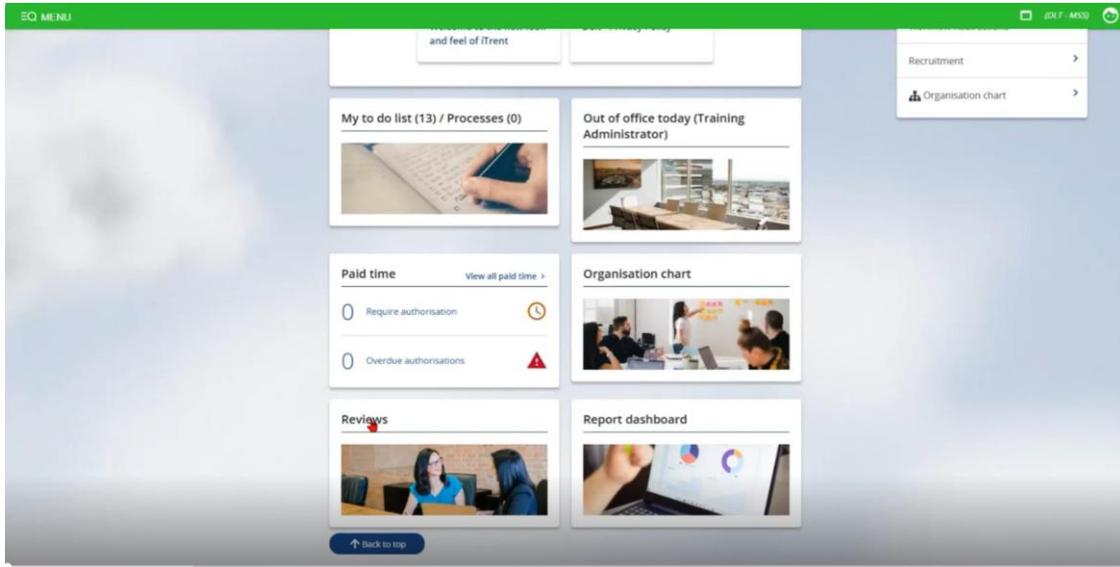
5. When you are happy with the monthly check in, click "**Submit review**", and "**Submit**" again. It will then appear in the completed section of the **Review summary page**.



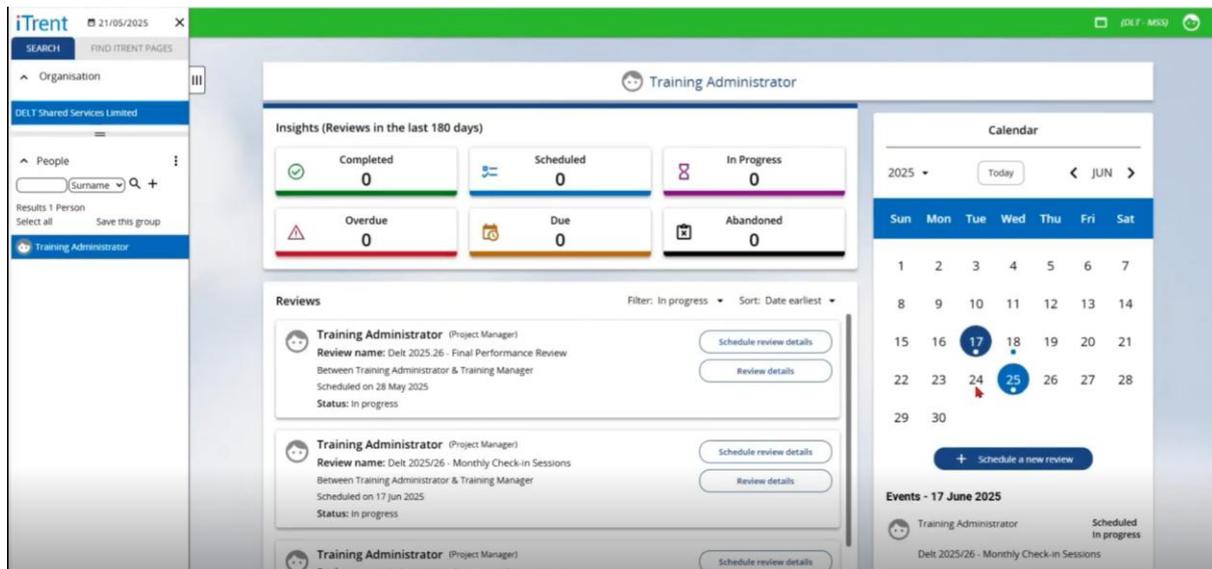
Please note: Unlike CoreHR, you will have to schedule each individual monthly check-in, they are not in a list like they were previously.

End of Year Review

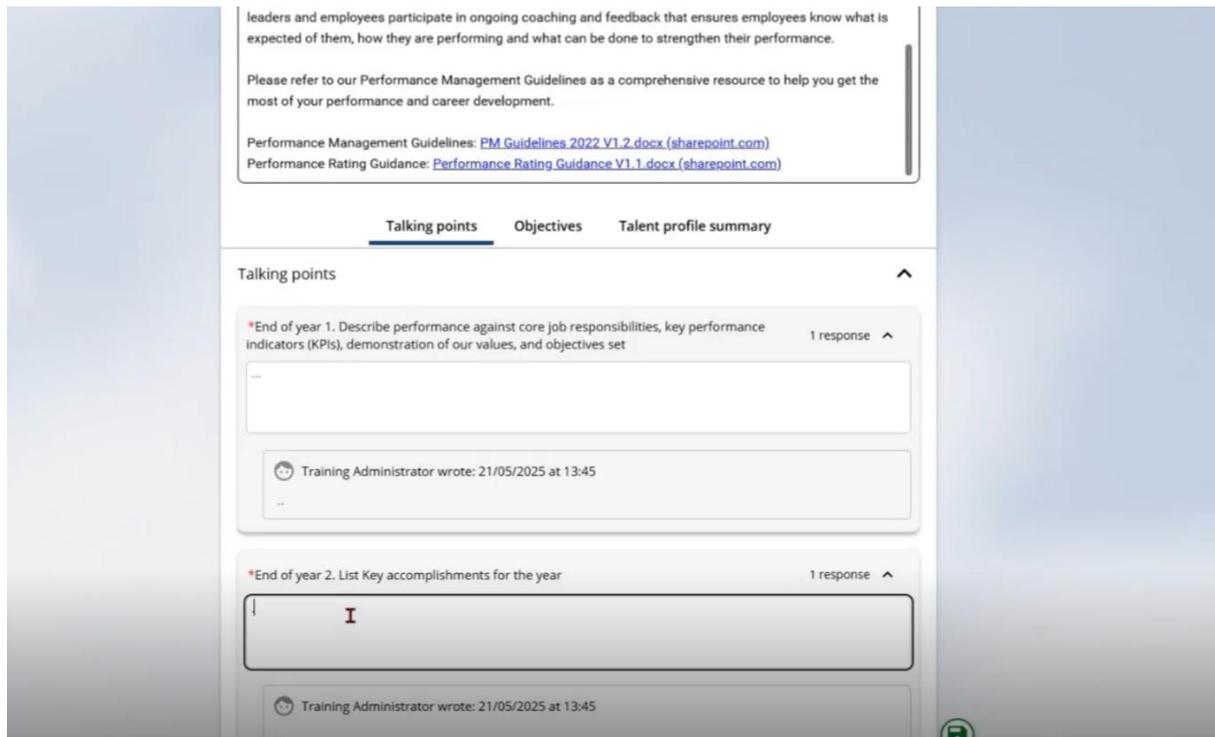
1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



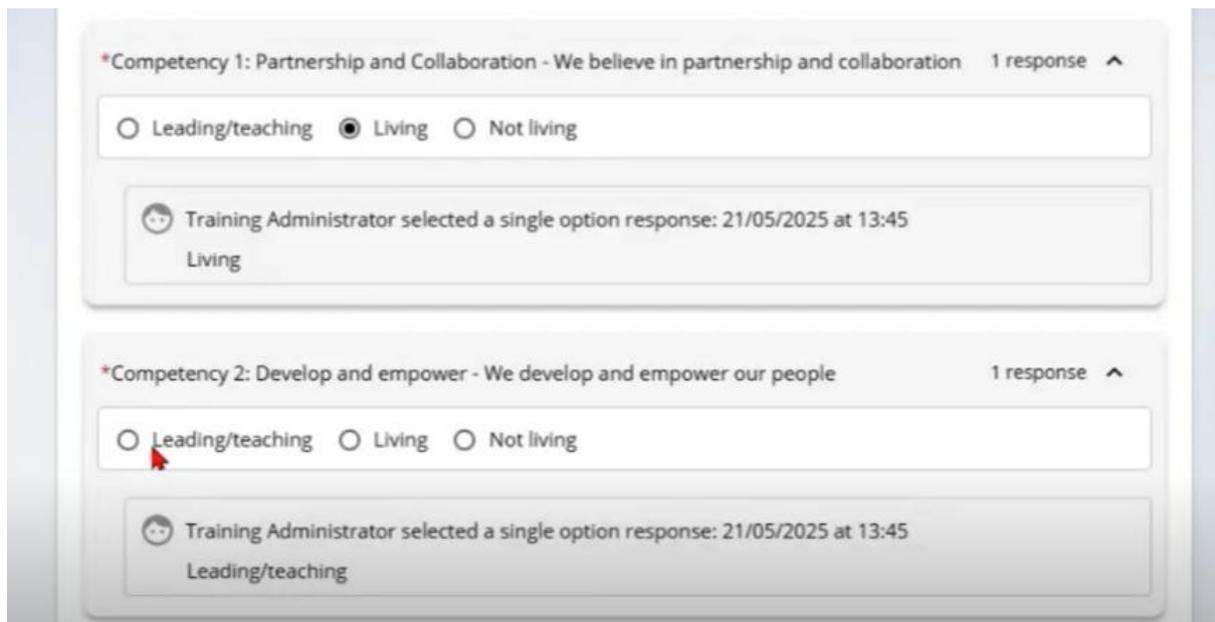
2. This will take you to this page. Follow the instructions from the first section of this guide to schedule a **Final Performance Review**. Once scheduled, under the **Reviews** on the summary page, select **Review details** on the **Final Performance Review**.



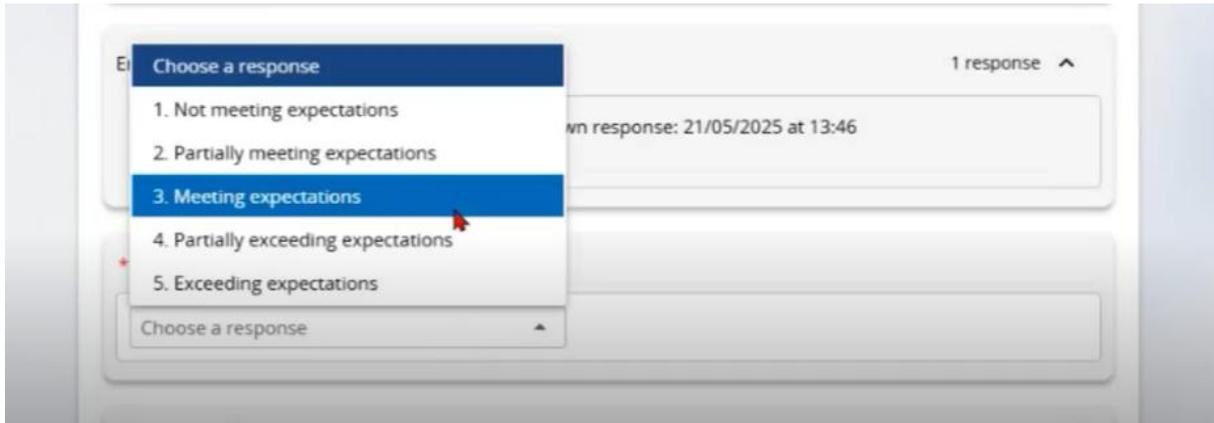
3. This is where you can add your commentary on the employee's performance alongside their comments that they will have pre-populated.



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



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.



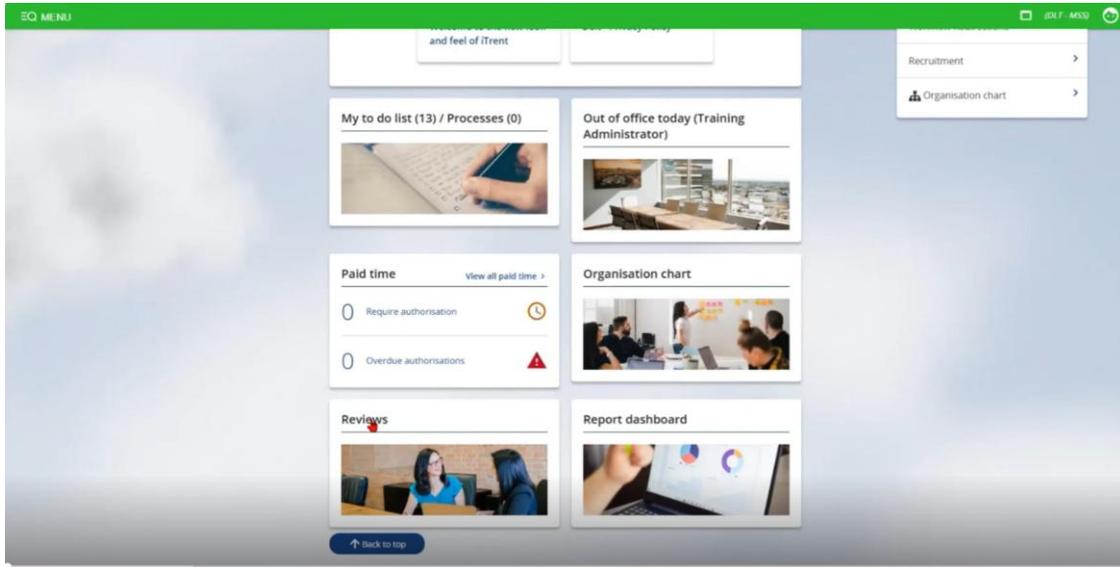
6. Once the external moderation has happened, you can then return to this form to confirm the rating. Confirm you are happy to submit your review and click **“Save”**. This will then appear in the completed section of the **Reviews summary** page.

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

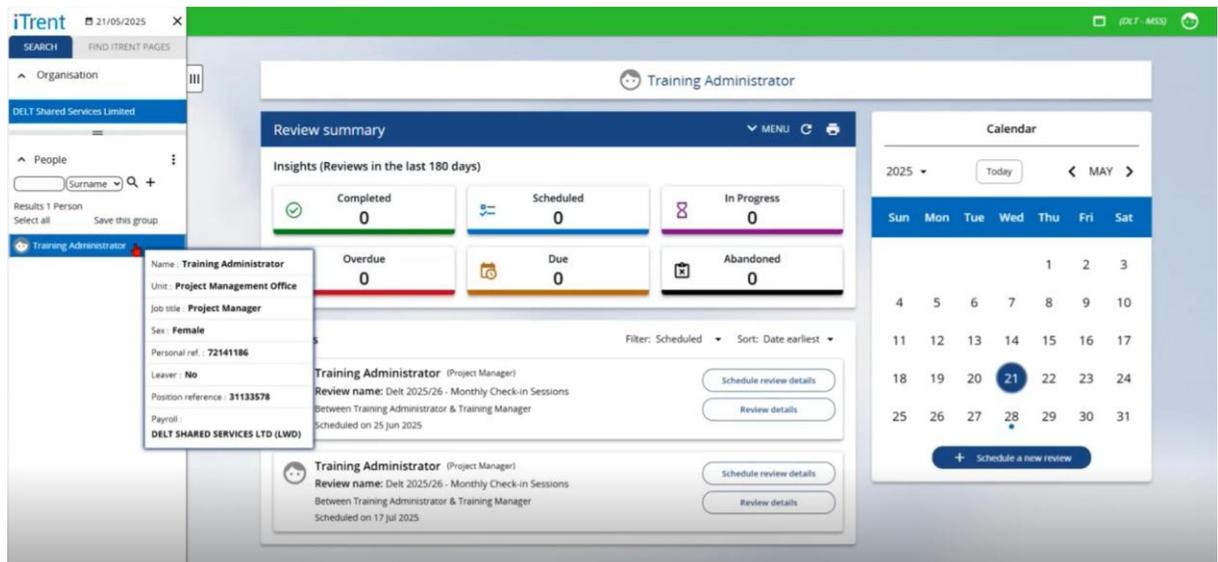
A screenshot of a performance review form. The form contains several sections: 1. 'Manager overall performance rating:' with a dropdown menu set to '3. Meeting expectations'. 2. 'Final overall performance rating:' with a dropdown menu set to '3. Meeting expectations' and an information icon. 3. 'Are you happy to submit your review (please remember to press the SUBMIT button when the review is completed by both you and your manager):' with a dropdown menu set to 'Yes' and a '1 response' indicator. 4. A text box showing a confirmation message: 'Training Administrator selected a drop down response: 21/05/2025 at 13:46' with 'Yes' below it. 5. 'Comments' section with a text area for 'Add comment here' and an 'Add comment' button. 6. At the bottom, there are two buttons: 'Save' (green) and 'Abandon' (red).

Objective Setting

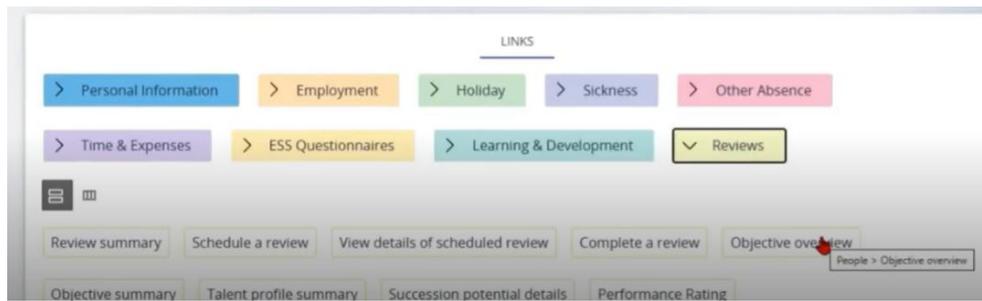
1. Navigate to the same **Reviews summary page** from your Manager Dashboard.



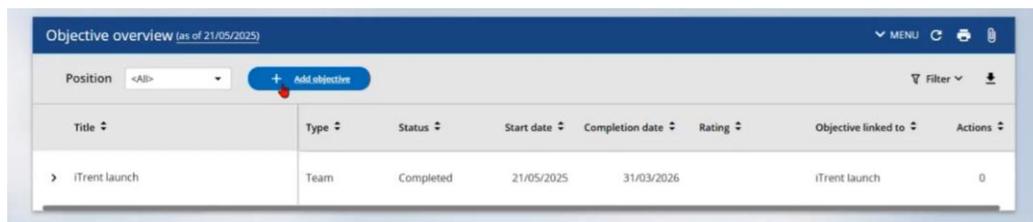
2. This will take you to this page. Employees can input their own objectives, click on your relevant employee in the left-hand pane to reach their **Employee Summary Page**.



3. Scroll to links, click **“Reviews”**, then **“Objective Overview”**.



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



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**”.

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.

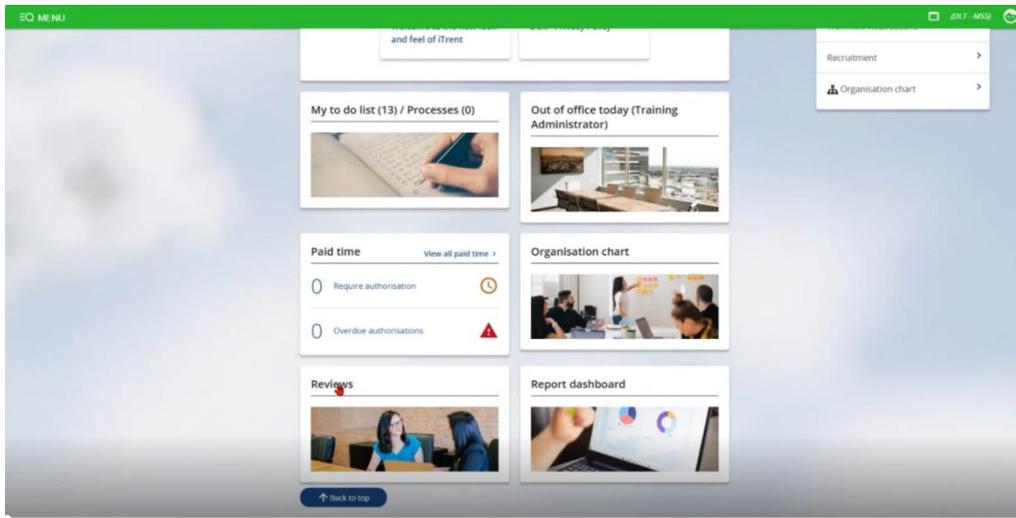
Objective overview (as of 21/05/2025)

Position <All> + Add objective Filter

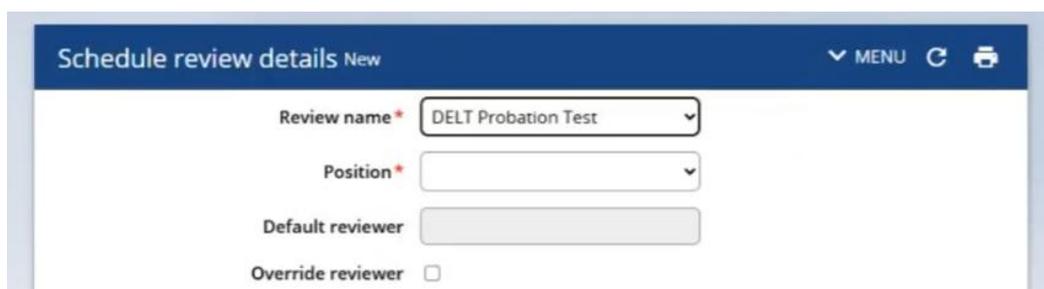
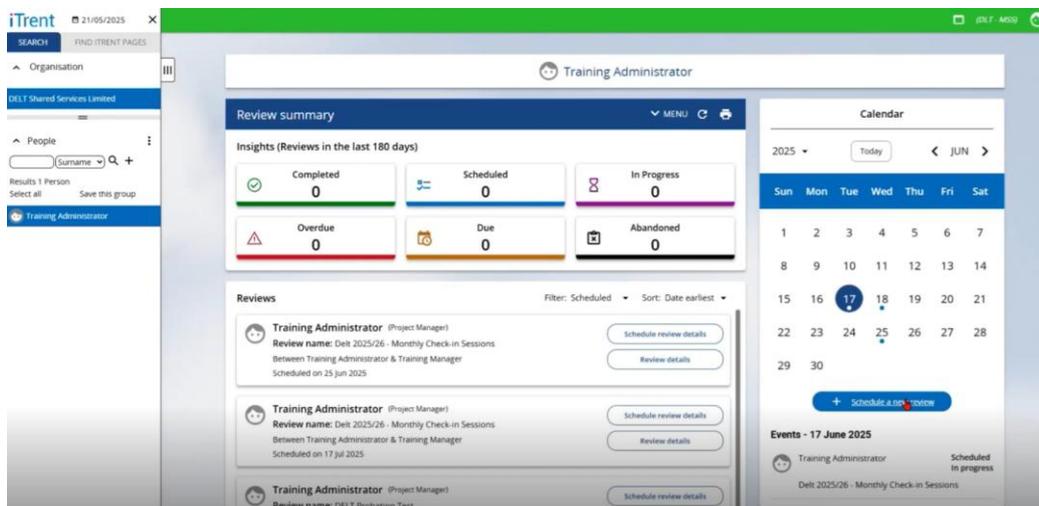
Title	Type	Status	Start date	Completion date	Rating	Objective linked to	Actions
> iTrent launch	Team	Completed	21/05/2025	31/03/2026		iTrent launch	0
> Training	Team	Completed	21/05/2025	31/03/2026		Training	0

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.

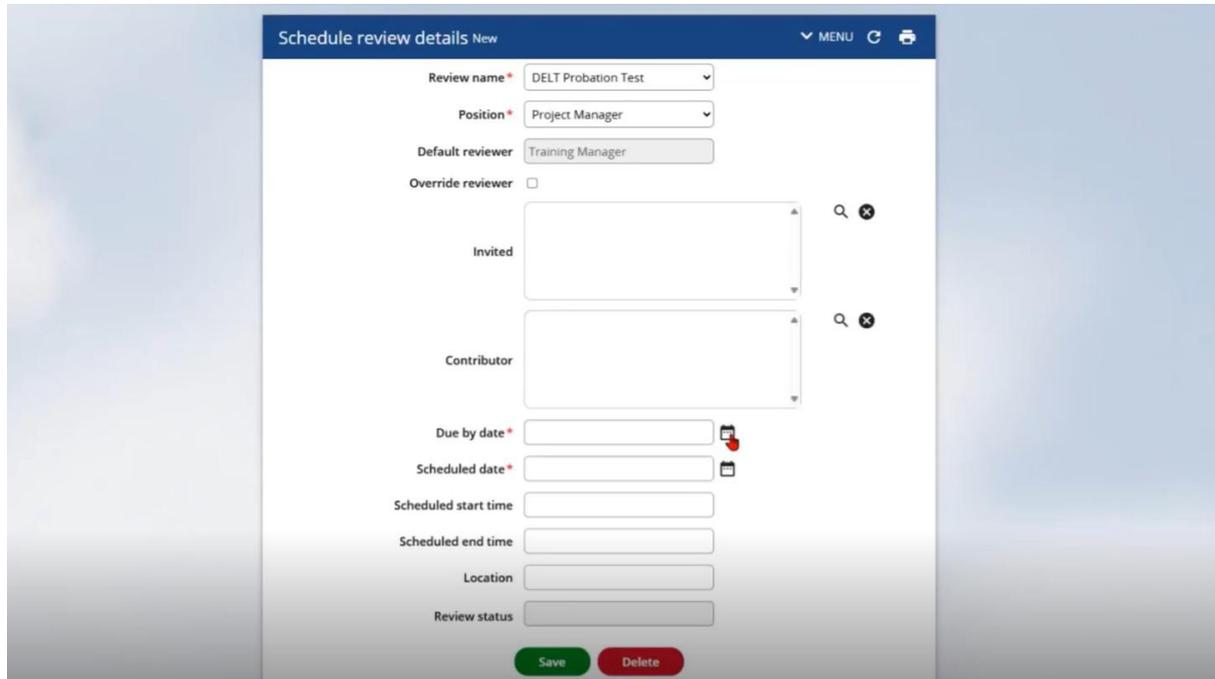


2. This will take you to this page. As a line manager, **schedule a new review** and select the **Probation** option from the drop-down.



3. Complete the rest of the form.

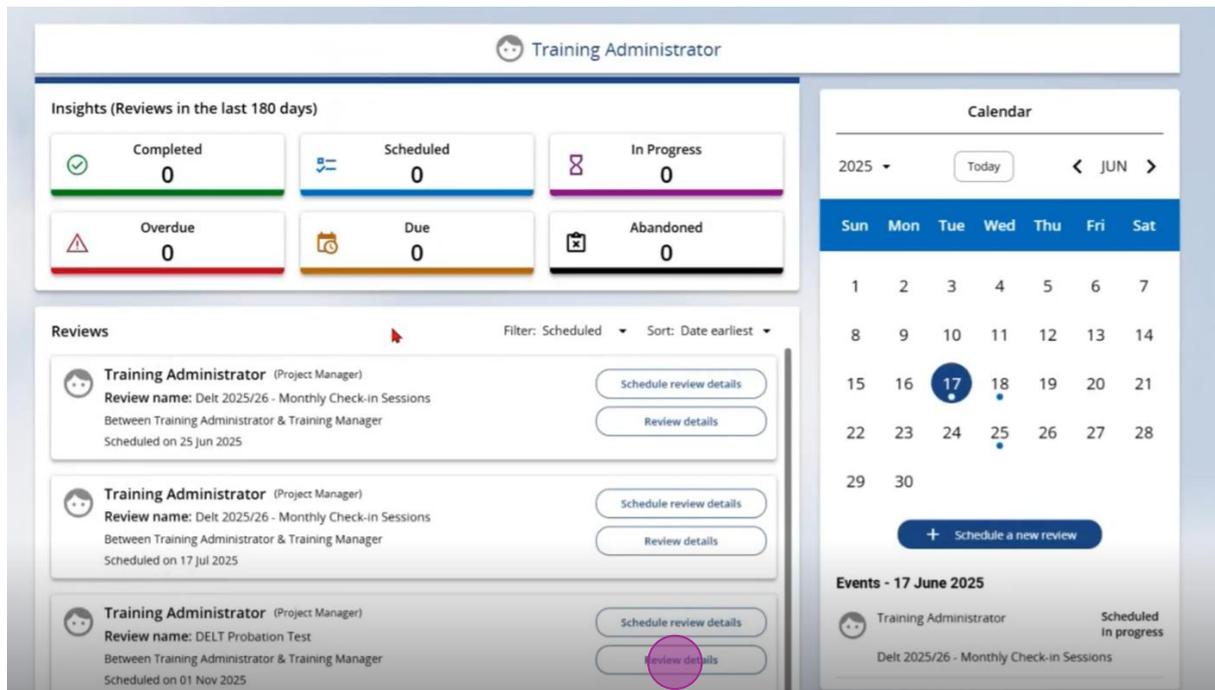
- The **Due by date** will be 6 months from their start date. The **Scheduled date** would be the same. This allows the form to remain active for the whole probation period.
- Click **“Save”**.



The screenshot shows a web form titled "Schedule review details New". The form contains the following fields and controls:

- Review name***: A dropdown menu with "DELT Probation Test" selected.
- Position***: A dropdown menu with "Project Manager" selected.
- Default reviewer**: A text input field containing "Training Manager".
- Override reviewer**: A checkbox that is currently unchecked.
- Invited**: A searchable list box for selecting invited reviewers.
- Contributor**: A searchable list box for selecting contributors.
- Due by date***: A date picker field.
- Scheduled date***: A date picker field.
- Scheduled start time**: A time input field.
- Scheduled end time**: A time input field.
- Location**: A text input field.
- Review status**: A text input field.
- At the bottom, there are two buttons: a green "Save" button and a red "Delete" button.

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

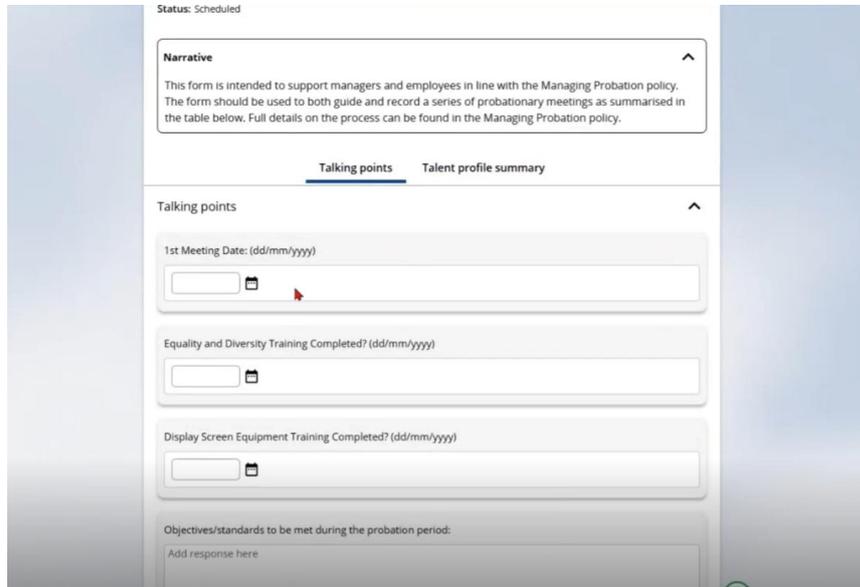


The screenshot shows the "Training Administrator" dashboard. It features a navigation bar at the top with the user's name and a profile icon. Below the navigation bar, there are several sections:

- Insights (Reviews in the last 180 days)**: A summary of review statistics with six cards:
 - Completed: 0
 - Scheduled: 0
 - In Progress: 0
 - Overdue: 0
 - Due: 0
 - Abandoned: 0
- Reviews**: A list of reviews with filters and sorting options. The filter is set to "Scheduled" and the sort is "Date earliest". Three review entries are visible:
 - Training Administrator (Project Manager)**: Review name: Delt 2025/26 - Monthly Check-in Sessions. Between Training Administrator & Training Manager. Scheduled on 25 Jun 2025. Buttons: "Schedule review details", "Review details".
 - Training Administrator (Project Manager)**: Review name: Delt 2025/26 - Monthly Check-in Sessions. Between Training Administrator & Training Manager. Scheduled on 17 Jul 2025. Buttons: "Schedule review details", "Review details".
 - Training Administrator (Project Manager)**: Review name: DELT Probation Test. Between Training Administrator & Training Manager. Scheduled on 01 Nov 2025. Buttons: "Schedule review details", "Review details". A purple circle highlights the "Review details" button for this entry.
- Calendar**: A calendar view for June 2025. The date 17 is highlighted. A button "+ Schedule a new review" is located below the calendar.
- Events - 17 June 2025**: A list of events for the selected date, including "Training Administrator" (Scheduled) and "Delt 2025/26 - Monthly Check-in Sessions" (In progress).

- 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.

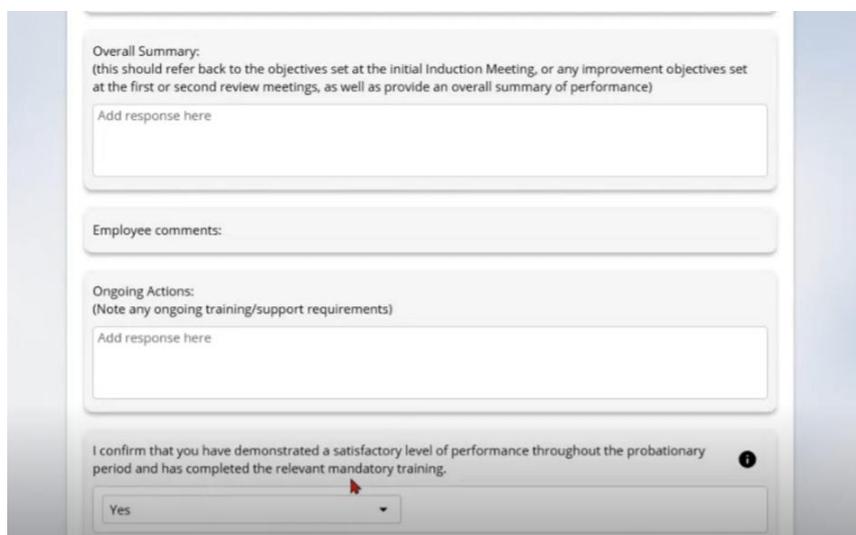
Click **“Save”**. You can review this form at each probation point where both employee and manager can input their comments/feedback.



The screenshot shows a web form titled "Status: Scheduled". It has a "Narrative" section with a text area containing instructions: "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." Below this are two tabs: "Talking points" (selected) and "Talent profile summary". Under "Talking points", there are three date input fields: "1st Meeting Date: (dd/mm/yyyy)", "Equality and Diversity Training Completed? (dd/mm/yyyy)", and "Display Screen Equipment Training Completed? (dd/mm/yyyy)". Each field has a calendar icon. At the bottom of this section is a text area labeled "Objectives/standards to be met during the probation period:" with the placeholder "Add response here".

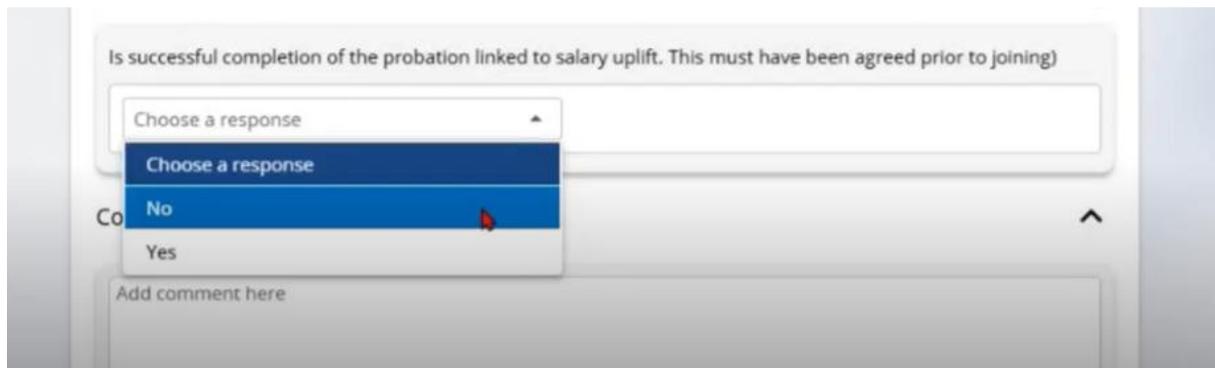
- All three probation points (1 month, 3 months, 6 months) are in this form. Simply, return to the form at each point to input comments/feedback and to confirm where mandatory training has been completed.
- At the end of the probation, you can give an overview summary and confirm whether the employee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

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



The screenshot shows the bottom part of the probation form. It features three text input areas: "Overall Summary: (this should refer back to the objectives set at the initial Induction Meeting, or any improvement objectives set at the first or second review meetings, as well as provide an overall summary of performance)", "Employee comments:", and "Ongoing Actions: (Note any ongoing training/support requirements)". Each area has a placeholder "Add response here". Below these is a confirmation statement: "I confirm that you have demonstrated a satisfactory level of performance throughout the probationary period and has completed the relevant mandatory training." followed by a dropdown menu currently set to "Yes".

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



Is successful completion of the probation linked to salary uplift. This must have been agreed prior to joining)

Choose a response

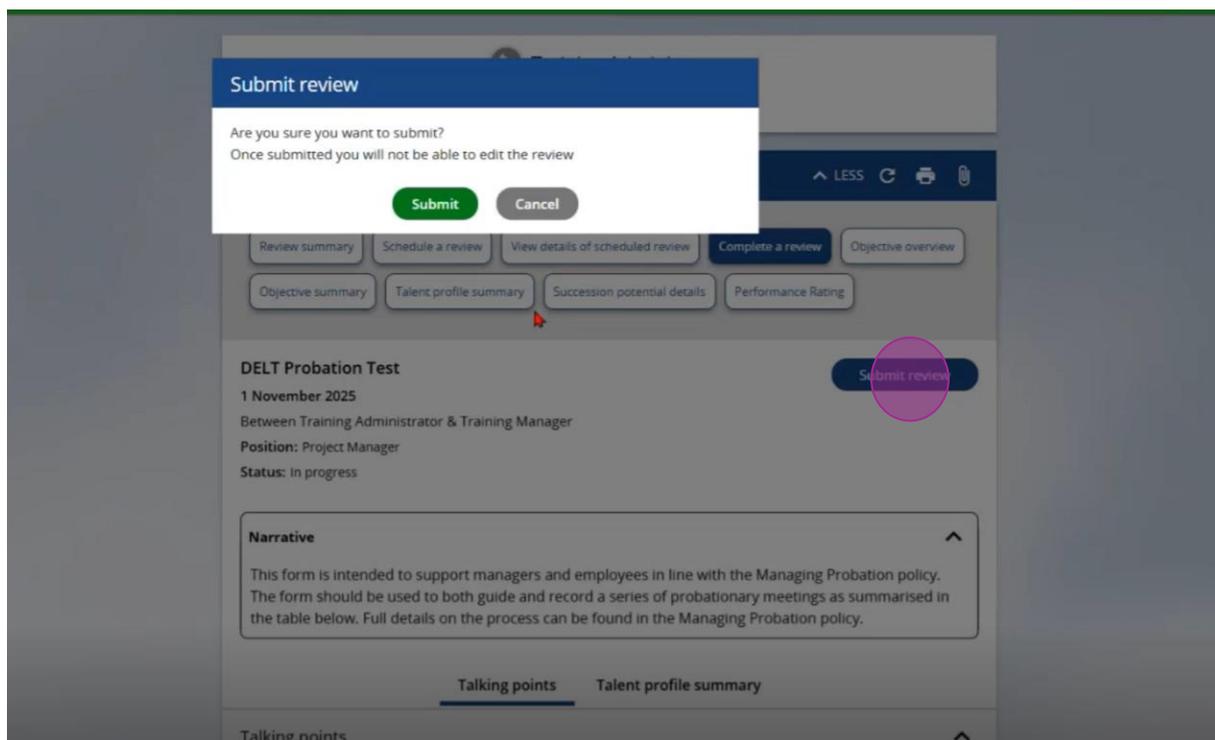
Choose a response

No

Yes

Add comment here

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

Submit Cancel

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

Submit review

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