ESS GUIDE > HOW TO RECORD YOUR PDR DISCUSSION DATE

Overview

- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, you need to generate the review lifecycle and record the PDR discussion date.
- We recommend that you record the discussion date after the meeting takes place.
- You must submit the Review Date screen before the rest of the lifecycle form can be completed.
- After the PDR discussion, your manager can record, save and submit their comments.
- Your manager might wish to share and confirm their comments outside of iTrent before submitting.
- Once their comments are submitted, you will receive an email notification.
- At this point, you can login, view their comments and record, save and submit your own comments.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- Once the reviewer and reviewee comments have been submitted, the process is complete in iTrent.

- **If your reviewer is not your manager**, they will not have access to your details via iTrent.
- You can still use iTrent to record your PDR discussion date.
- You will need to complete a "paper" copy using the Word template (insert link).
- For guidance on how to upload the Word document to iTrent, please see the separate guide.

This guide covers the following actions.

- Recording your PDR discussion date.
- Submitting your PDR discussion date.

RECORD YOUR PDR DISCUSSION DATE

- You must generate the lifecycle before you can record the discussion date.
- See the separate guide on How to Generate Your Review Lifecycle.
- We recommend that you record the PDR discussion date after the meeting takes place.
- Once you save and submit this screen, the discussion date cannot be amended in iTrent.
- You can save the date and submit the screen at a later stage.
- You must submit this screen before your manager can record their comments.

- Login to Employee Self-Service and select the PDR & Objectives menu option, as below.
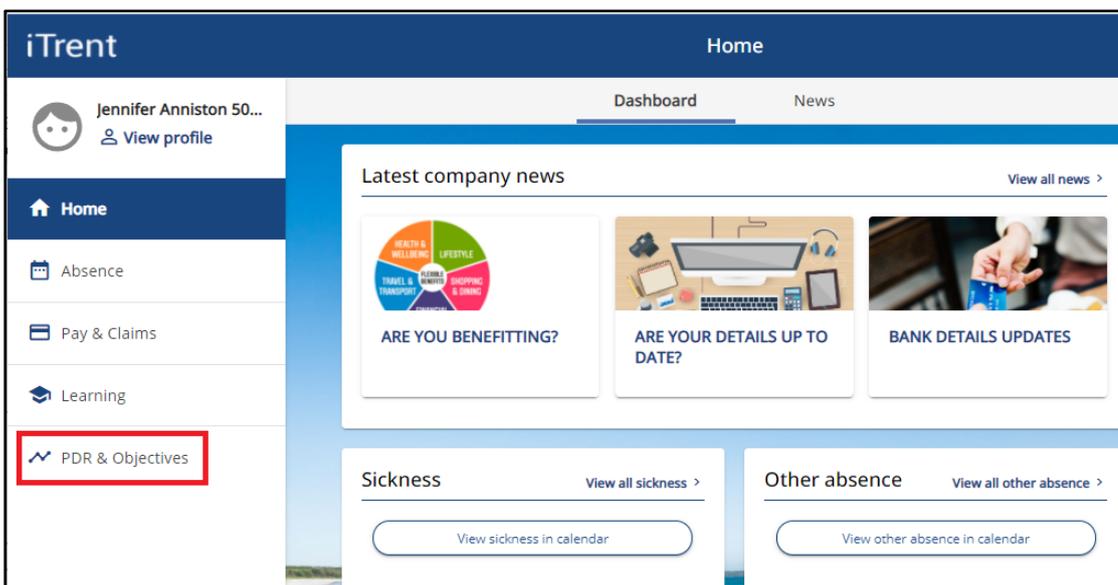
- Click on the review lifecycle name, as below.

- The lifecycle screen will open, as below.
- Click the review date link, as below.

- The lifecycle form will open, as below.
- Click the Start button, as below, to access the review date screen and record the discussion date.

- The review date screen will open as below.

- Record the date of your PDR discussion and click the Summary button to save your changes.
- We recommend that you record the PDR discussion date after the meeting takes place.
- Once you save and submit this screen, the discussion date cannot be amended in iTrent.
- You can save the date and submit the screen at a later stage.
- You must submit this screen before your manager can record their comments.

- Once you click the Summary button, the lifecycle form will display as below.
- A green tick against the review date link confirms that the date has been recorded.
- You can submit this screen now or at a later stage.
- You must submit the screen, as below, to enable your manager to record their comments.
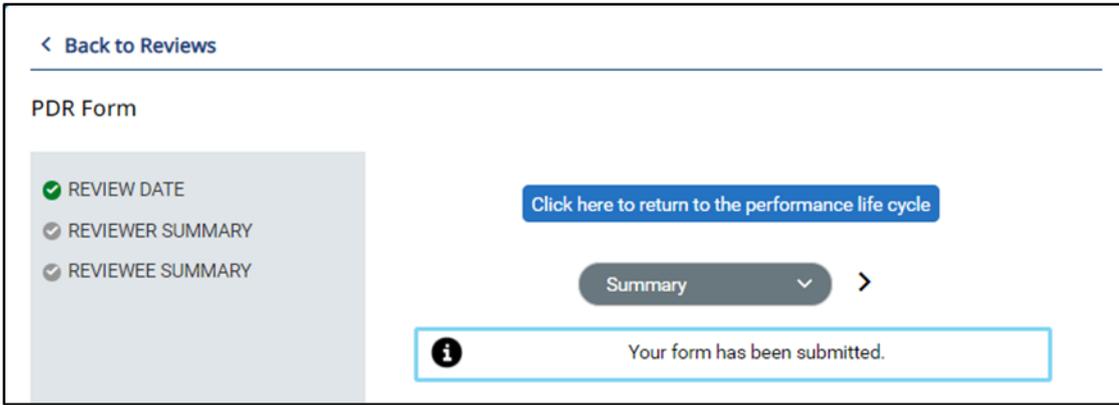

SUBMIT YOUR PDR DISCUSSION DATE

- When you click Submit, you will be asked to confirm that you wish to submit, as below.
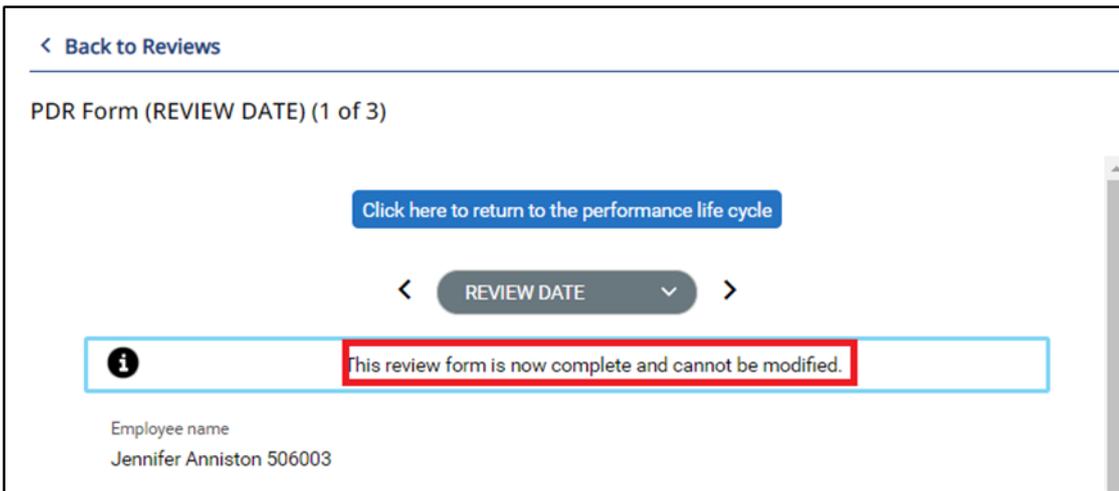- Click OK to submit or Cancel to exit without submitting.

- When you submit the screen, a confirmation message displays as below.

- If you try to edit this screen after submitting it, the following message will be displayed.

- The review lifecycle will now display your manager as stage owner and the current stage as reviewer summary.