

Overview

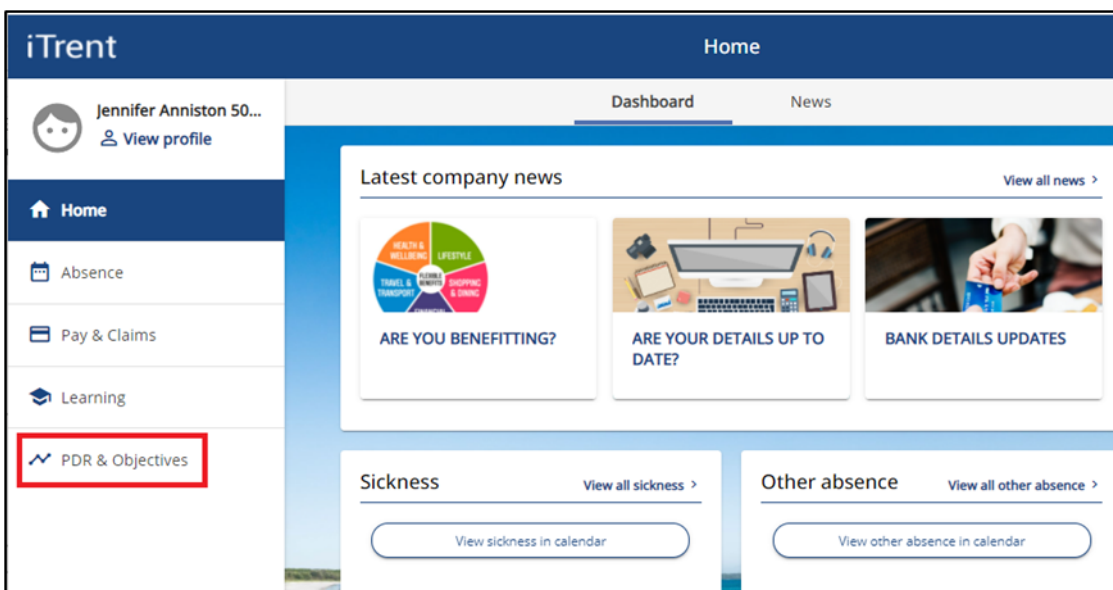
- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, you need to generate the review lifecycle and record the PDR discussion date.
- We recommend that you record the discussion date after the meeting takes place.
- You must submit the Review 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](#)
- For guidance on how to upload the Word document to iTrent, please see the separate guide.

This guide covers the following actions.

- Recording your reviewee comments.
- Completing the review lifecycle.

RECORD YOUR REVIEWEE COMMENTS

- You will not be able to record your comments until your reviewer has submitted their comments.
- You will receive an email notification when your reviewer has submitted their comments.
- Login to Employee Self-Service and select the PDR & Objectives menu option, as below.



- At this point the lifecycle will show you as the stage owner and the current stage as reviewee summary.
- Click on the review lifecycle name, as below, to open the lifecycle.

The screenshot shows the iTrent Performance interface. On the left is a navigation menu with options like Home, Absence, Pay & Claims, Learning, and PDR & Objectives. The main content area is titled 'Performance' and has tabs for 'Reviews' and 'Objectives'. Under 'Reviews', there's a section for 'Review Lifecycles' with filters for 'All' and 'Current'. A table lists review lifecycles with columns for Lifecycle name, Start date, Current stage, Stage target end date, and Stage owner. One row is highlighted with 'REVIEWEE SUMMARY' in the Current stage column and 'Jennifer Anniston 506003' in the Stage owner column, both highlighted with red boxes. Below this is a 'Review Forms' section.

- The lifecycle screen will open, as below
- Click on the reviewee summary link, as below.

This screenshot shows the 'PDR 2021 0.1' lifecycle form. On the left, there's a progress bar with items: 'PDR', 'PDR', 'REVIEW DATE' (checked), 'REVIEWER SUMMARY' (checked), and 'REVIEWEE SUMMARY' (with a warning icon and highlighted by a red box). Below the progress bar, it says 'PDR Complete'. On the right, the 'REVIEWEE SUMMARY' section is active, showing 'Target end date: Saturday 1 January 2022' and 'Action responsibility: Jennifer Anniston 506003'. There's also a paragraph of text about recording PDR discussions and a link to 'PDR Guidance Webpage'.

- The lifecycle form will open as below.
- Click on the reviewee summary link, as below.

This screenshot shows the 'PDR Form' interface. On the left, there's a progress bar with items: 'REVIEW DATE' (checked), 'REVIEWER SUMMARY' (checked), and 'REVIEWEE SUMMARY' (checked and highlighted with a red box). On the right, there's a blue button that says 'Click here to return to the performance life cycle' and a 'Summary' dropdown menu with a right-pointing arrow.

- The reviewee summary section of the lifecycle form will open, as below.
- Record your reviewee comments.
- Click Save to save your changes.

< Back to Reviews

PDR Form (REVIEWEE SUMMARY) (3 of 3)

[Click here to return to the performance life cycle](#)

< REVIEWEE SUMMARY ▾

Further support and guidance can be found on our [PDR Guidance webpage here](#).

Now that your PDR discussion has taken place, please record your final comments. What aspects of the PDR conversation do you want to highlight?

Reviewee Summary Comments

I have really enjoyed all the opportunities and challenges this year.

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and enable your reviewer to access them. **Once submitted, you have completed this year's PDR form and no further changes can be made.** You can continue to update your work and development objectives throughout the year via the Objectives & PDR menu option in Employee Self-Service.

Previous Save Summary

- Once you click the Summary button, the lifecycle form will display as below.
- A green tick against the reviewee summary link confirms that this section has been completed.
- You can submit this screen now or at a later stage.
- Once you click the Submit button, as below, the lifecycle is complete.
- Once complete, no further changes can be made to any sections of the lifecycle.

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PDR Form

REVIEW DATE
  REVIEWER SUMMARY
  REVIEWEE SUMMARY

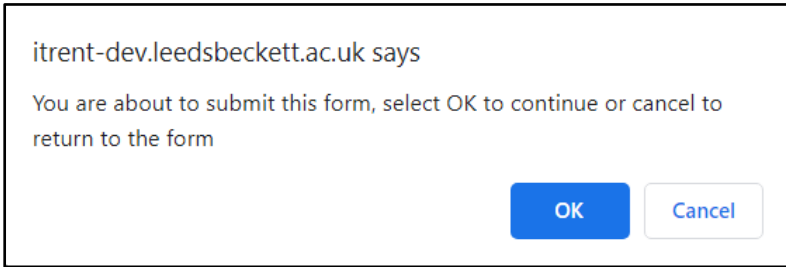
[Click here to return to the performance life cycle](#)

Summary ▾ >

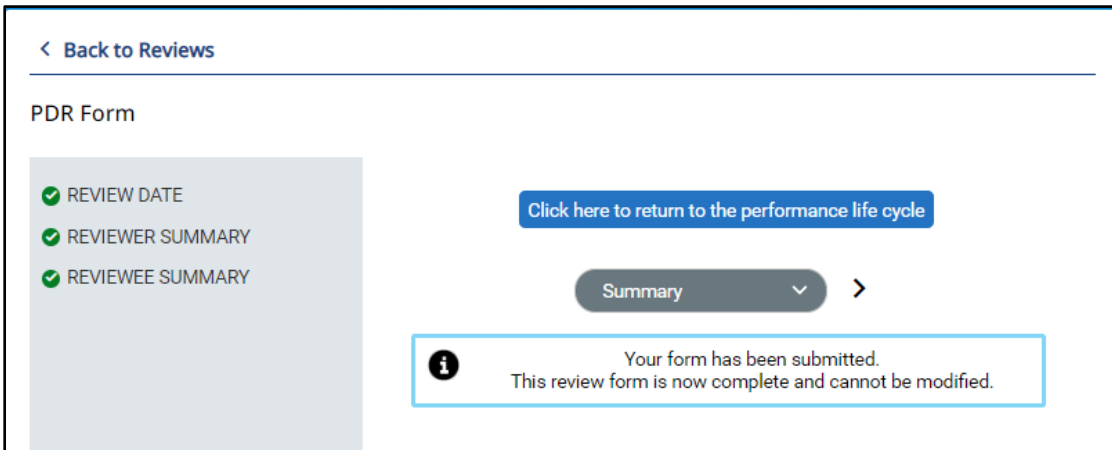
Start Submit Print

## COMPLETE YOUR REVIEW LIFECYCLE

- 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.



- The review lifecycle will display the current stage as completed, as below.
- The lifecycle can now be accessed on a read-only basis.
- Once completed in iTrent, the lifecycle and form will no longer show in the default display.
- For guidance on how retrieve and access completed reviews, please see the separate guide.

