REVIEWER LED FORM > ITRENT PDR SYSTEM > REVIEWEE USER GUIDE

Overview

- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, your reviewer will generate the review lifecycle.
- After the PDR discussion, your reviewer will record the discussion date and their summary comments.
- They may also upload supporting documents to the review form in iTrent.
- Your manager might wish to share and confirm their comments outside of iTrent before submitting them.
- 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.

This guide covers the following actions.

- Accessing your PDR lifecycle (form).
- Viewing your reviewer's summary comments.
- Viewing any documents uploaded to your review form.
- Recording your reviewee summary comments.
- Complete your review lifecycle (form).

ACCESS YOUR PDR LIFECYCLE (FORM)

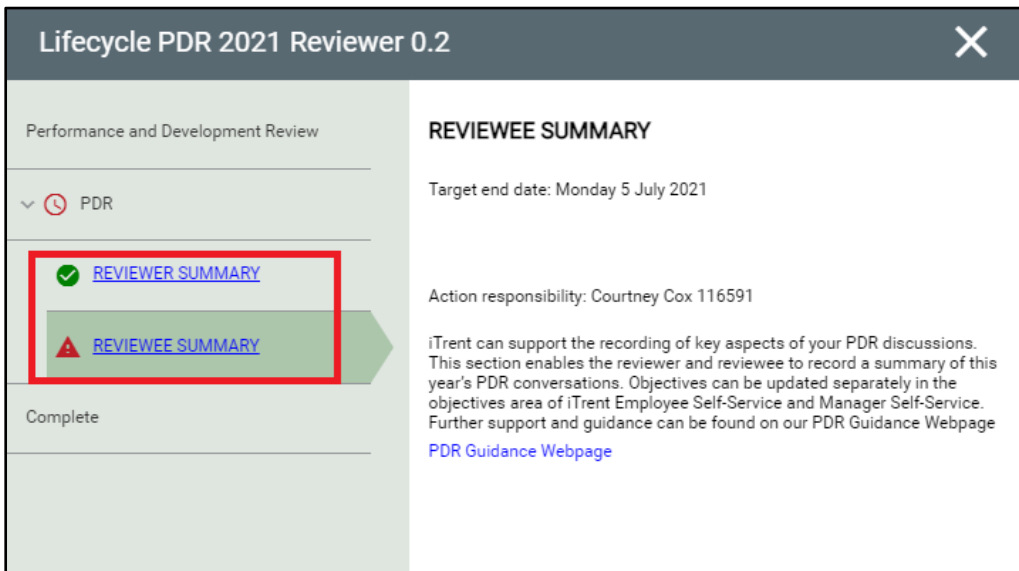- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.
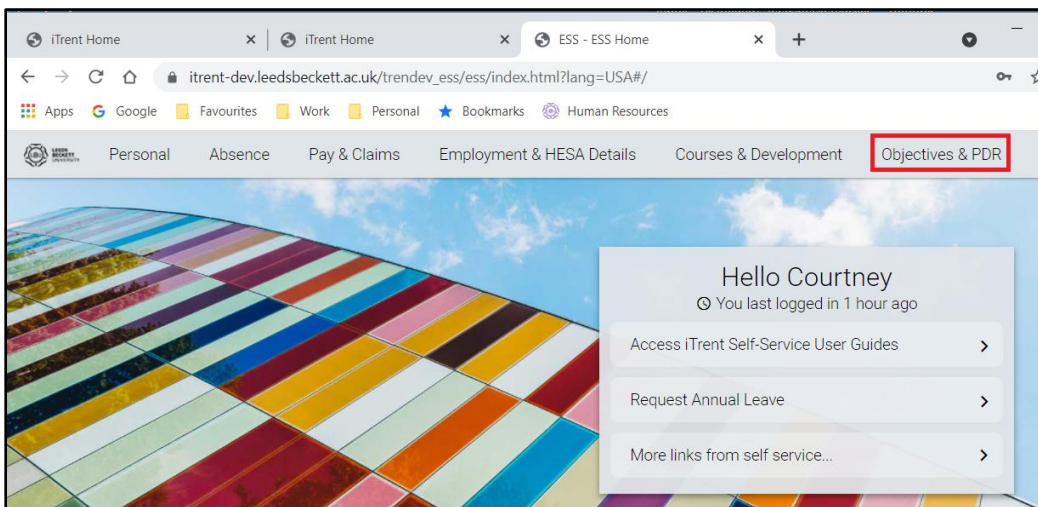
- Click on the review lifecycle tile, as below.
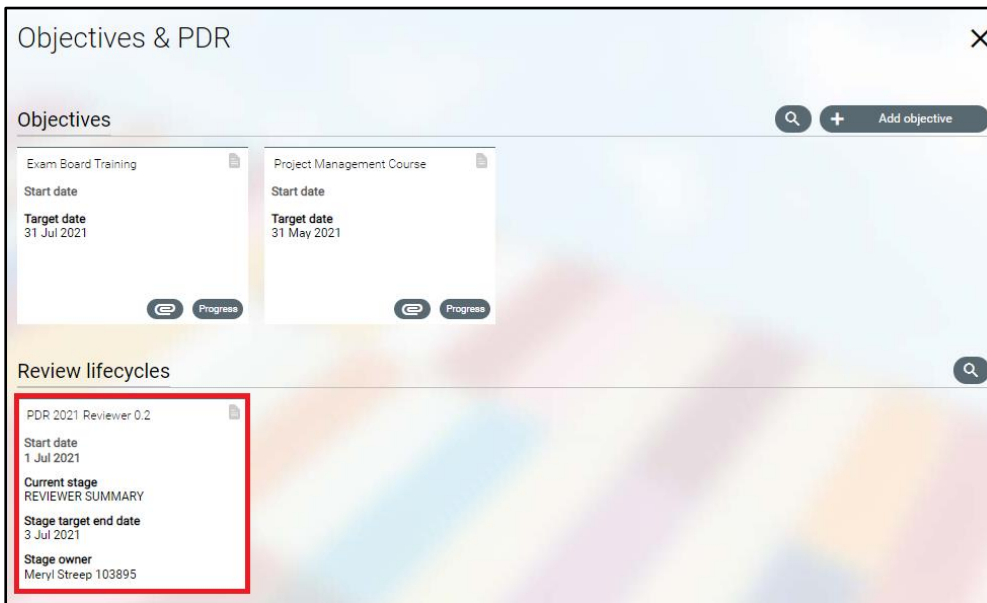
- If your reviewer hasn't completed and submitted the reviewer summary section, the reviewee summary link will not be active and the form will not be available for you to view or input, as below.
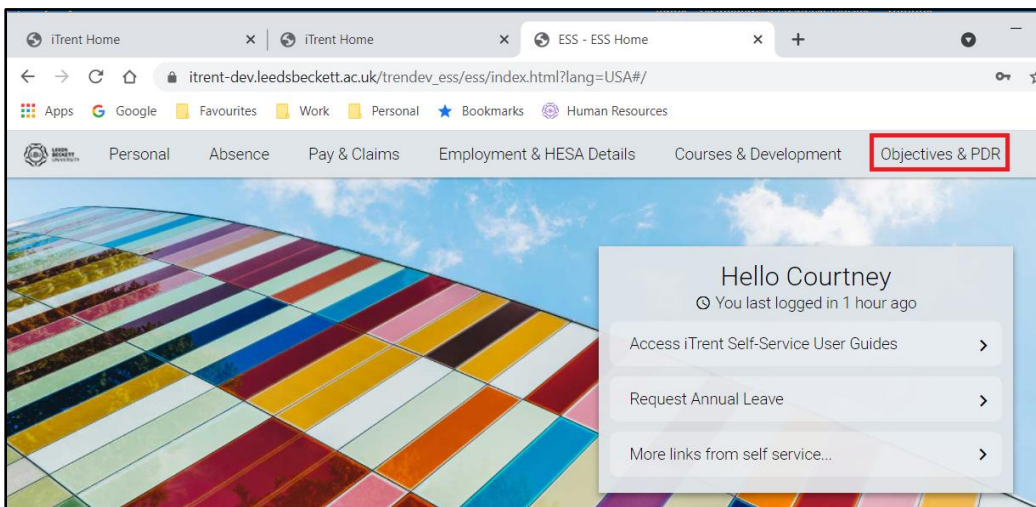- To close the screen, click the white X icon.

- If your review has completed and submitted their reviewer summary section, the links will be active, as below, and you can view their comments and add your own summary comments.
- To close the screen, click the white X icon.

VIEW YOUR REVIEWER'S SUMMARY COMMENTS

- 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.

- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.

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

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

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

- The reviewer summary section of the lifecycle form will open, as below.
- Scroll down to read your reviewer's comments.
- Click the white X icon to close the screen.

VIEW UPLOADED SUPPORTING DOCUMENTS

- You can view any supporting documents uploaded by your manager.
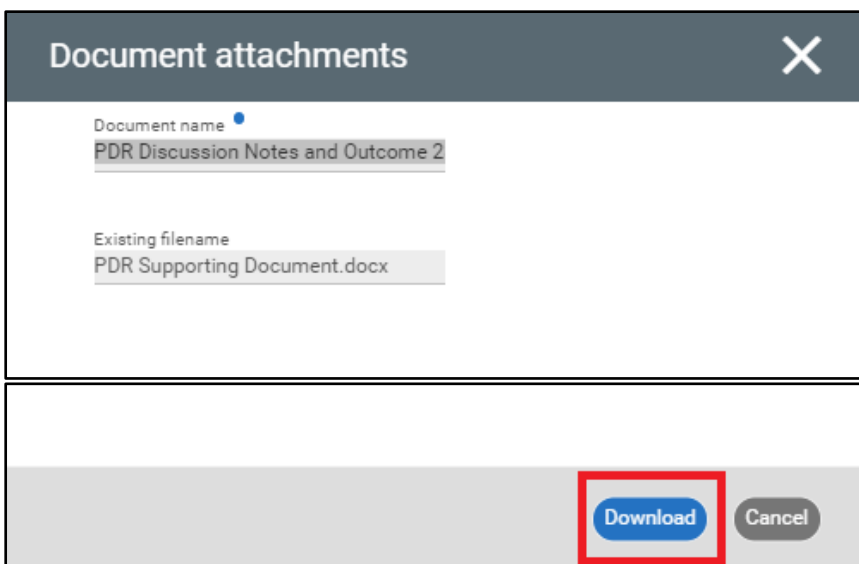- Login to Employee Self-Service and select the Objectives & PDR menu option, as below.

- Click on the review form tile paperclip icon, as below.
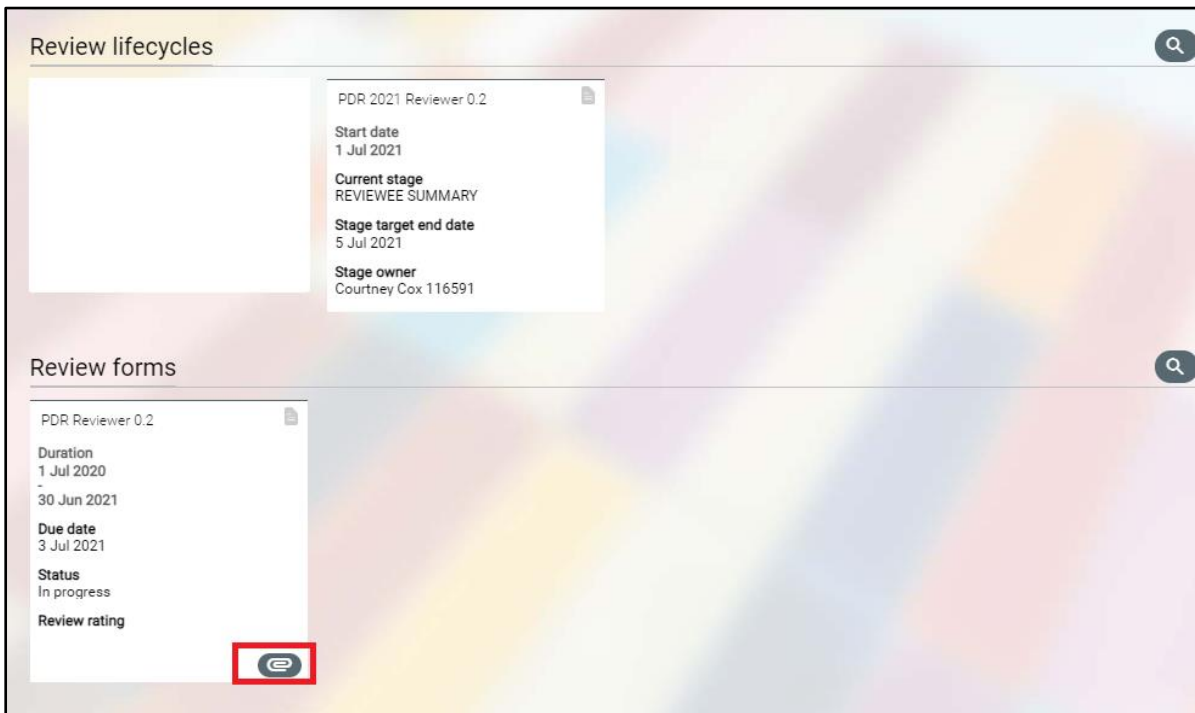
- A new document attachments window will open, as below.
- This will list any documents that have been uploaded to your review form.
- To view/download the documents, click on the document name, as below.
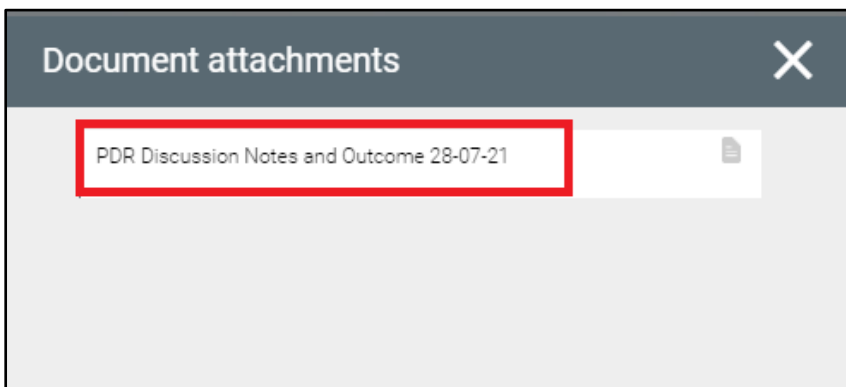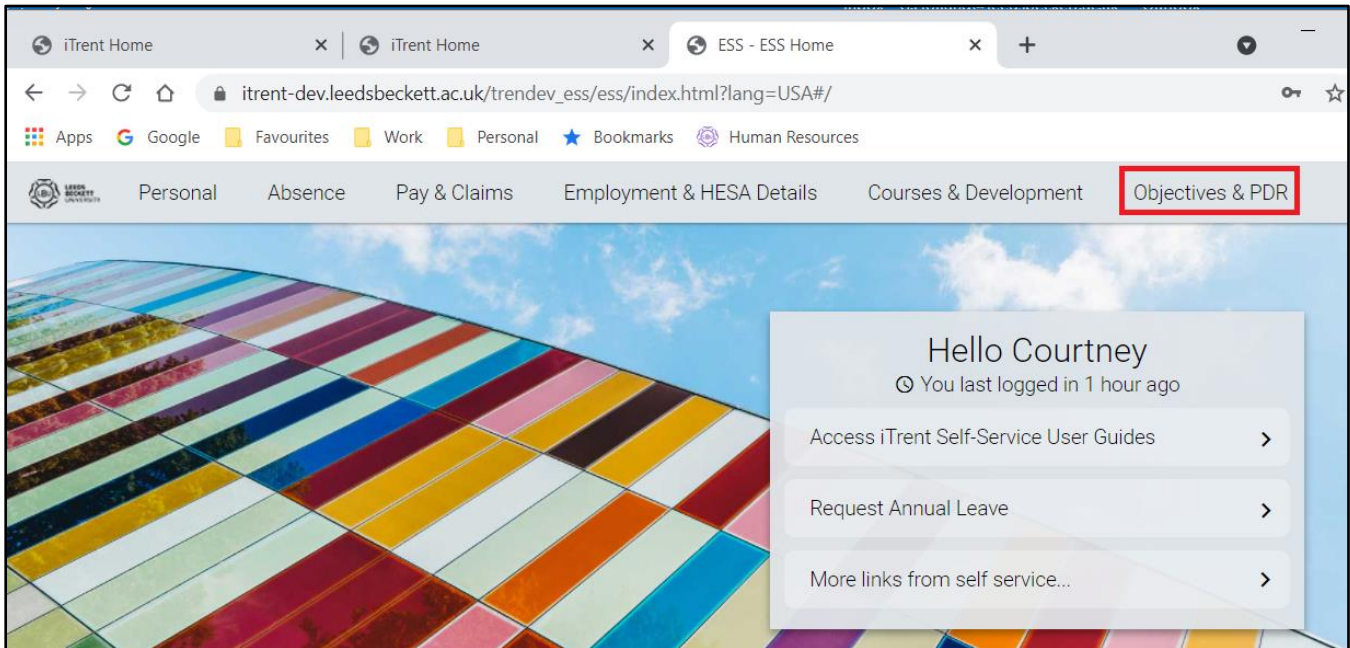

- A new window will open from where you can click the Download button, as below.
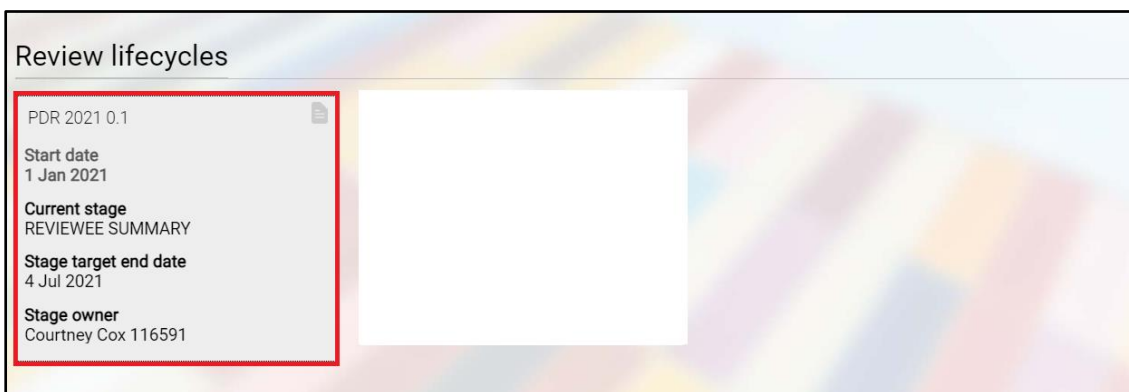- Click Cancel to exit this screen.

- 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 Objectives & PDR menu option, as below.

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

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

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

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

- 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.
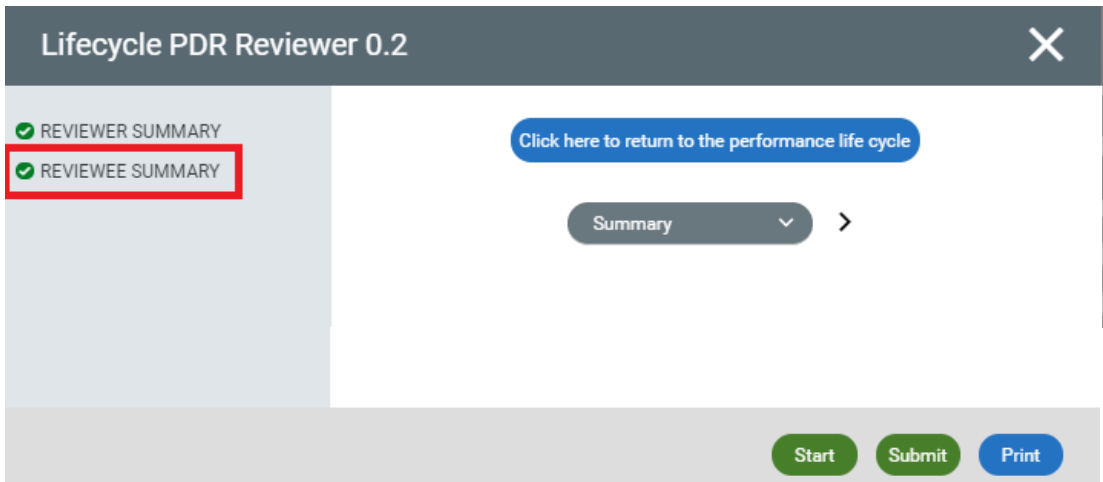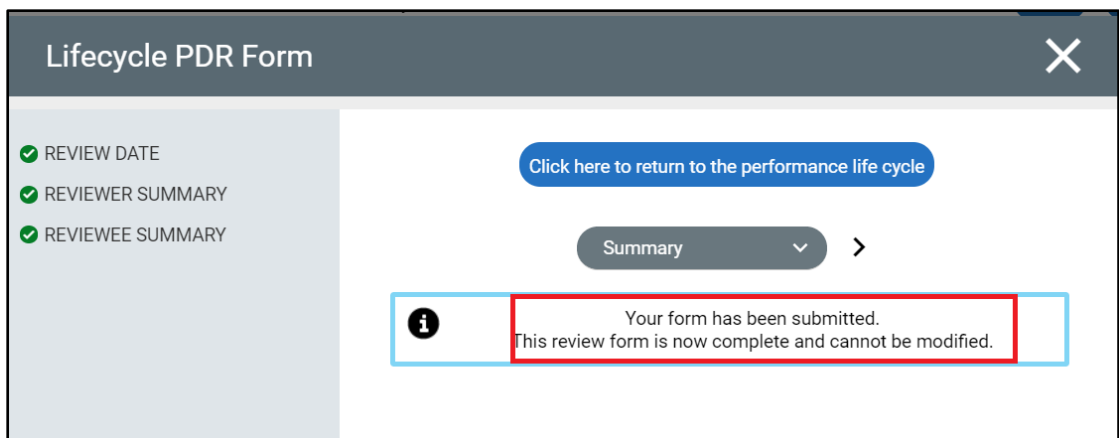

COMPLETE YOUR REVIEW LIFECYCLE (FORM)

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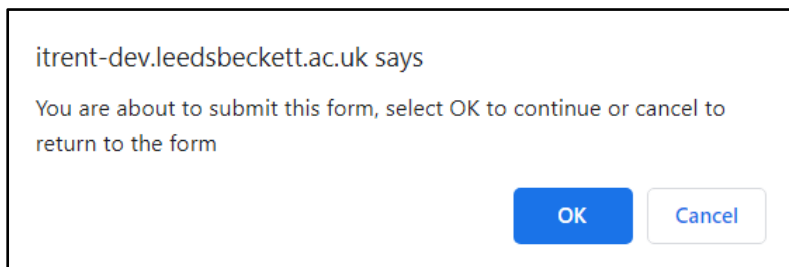
- When you submit the screen, a confirmation message displays as below.

- 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.

Review lifecycles

PDR 2021 0.1

Start date
1 Jan 2021

Current stage
Completed

Stage target end date

Stage owner