

## Overview

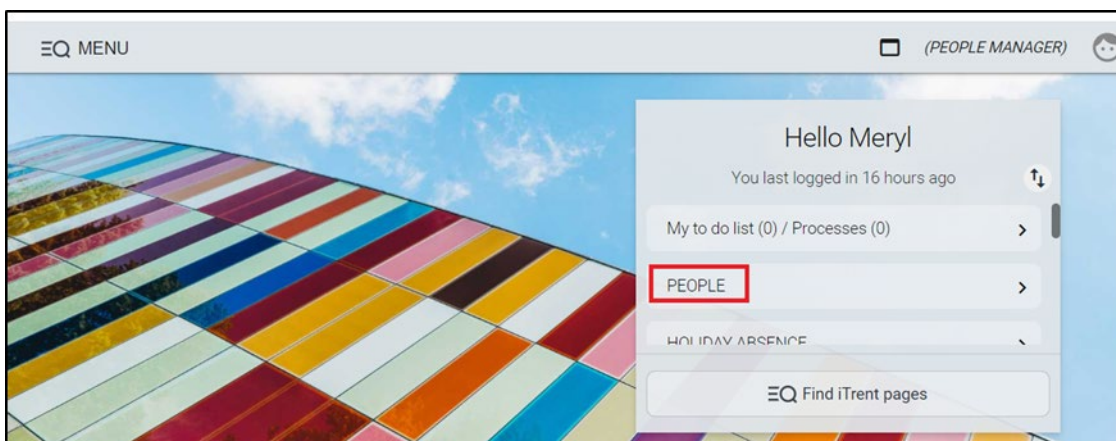
- The annual PDR discussion is recorded separately from objectives in iTrent.
- To start the process, the reviewee generates the review lifecycle and records the PDR discussion date.
- We recommend that the discussion date is recorded after the meeting takes place.
- The reviewee must save and submit the review date screen before you can record your comments.
- After the PDR discussion, you can record your comments.
- You might wish to share and confirm your comments outside of iTrent before submitting.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- Once your comments are submitted, the reviewee will receive an email notification.
- The reviewee can then login, view your comments and record, save and submit their own comments.
- Once the reviewee submits their comments, the process is complete in iTrent.
- **If you are not the manager of your reviewees,** you will not have access to their details via iTrent.
- The reviewee can still use iTrent to record the PDR discussion date.
- You will need to complete a “paper” form using the [Word template](#).
- The reviewee can upload the Word document to iTrent, if they wish.

This guide covers the following actions.

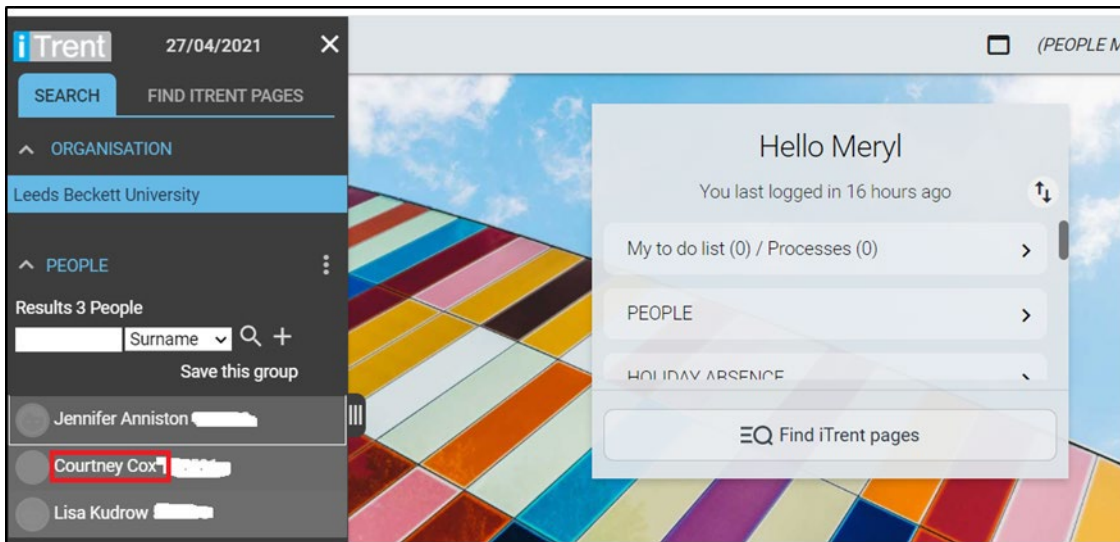
- Recording your reviewer comments.
- Submitting your reviewer comments.

## RECORD REVIEWER COMMENTS

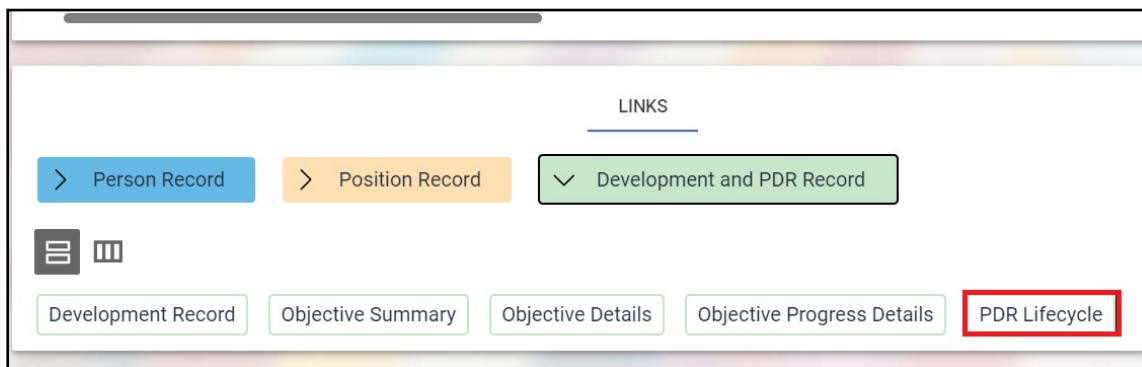
- You can add your comments once the discussion date has been recorded, saved and submitted by the reviewee.
- You might wish to share and confirm your comments outside of iTrent before submitting them.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- When you submit your comments, the reviewee will receive an email notification.
- You must submit your comments before the reviewee can add their own comments.
- Login to Manager Self-Service and select the Objectives & PDR menu option, as below.



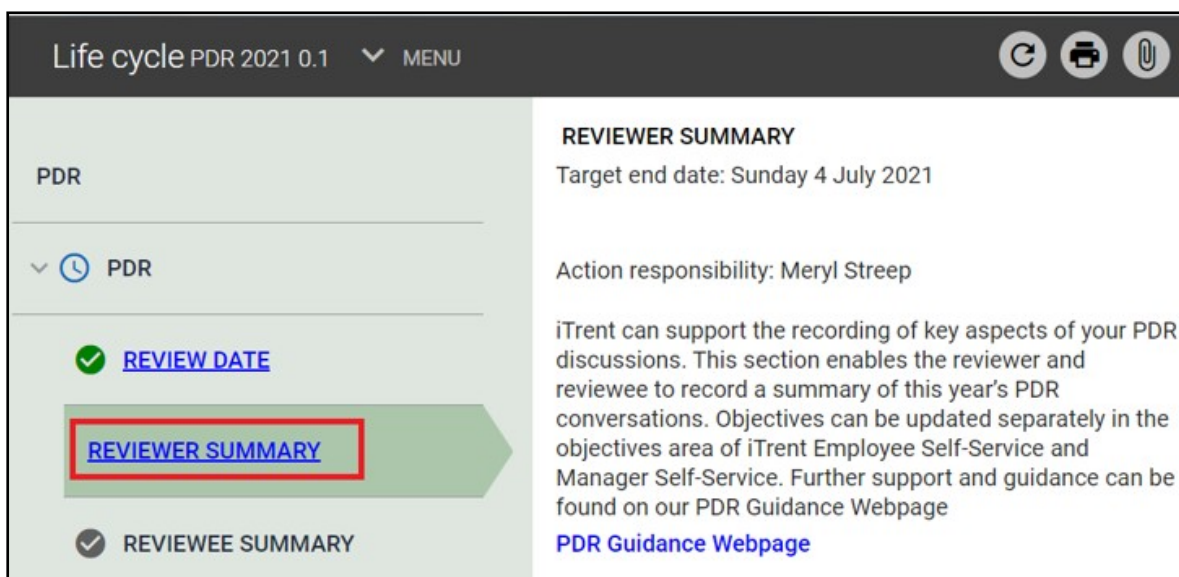
- Select one of your team from the list displayed in the left-hand pane, as below.



- The person summary screen will then display.
- Scroll down and click the development and PDR record folder as below.



- Click the PDR lifecycle link, as above, to access the reviewer summary section of the lifecycle, as below.
- The link to the section will be active only if the reviewee has recorded and submitted the discussion date.
- Click the reviewer summary link, as above, to access the review form.



- Click the reviewer summary link, as below, to access this section of the form, as below.

Performance review form PDR Form

REVIEW DATE

**REVIEWER SUMMARY**

REVIEWEE SUMMARY

Summary

- Add your comments and click Save to save the changes, as below.
- You might wish to share and confirm your comments outside of iTrent before submitting them.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- When you submit your comments, the reviewee will receive an email notification.
- You must submit your comments before the reviewee can add their own comments.

Performance review form REVIEWER SUMMARY (2 of 3)

REVIEWER SUMMARY

Employee name
Jennifer Anniston

Job title
Actor 280105

Reporting manager
Meryl Streep

Reporting manager job title
Director 299700

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?

**Once you have saved and submitted your comments, you cannot make any amendments. Please share and confirm your comments with the reviewee if required before submitting.**

Reviewer Summary Comments

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and send a notification to your reviewee to let them know. They will then be able to access this form and add their own comments. Once the reviewee has updated and submitted the form, no further changes can be made. You can continue to update work and development objectives throughout the year via the Objective Summary screen in Manager Self-Service.

PREVIOUS

SAVE

SUMMARY

NEXT

## SUBMIT REVIEWER COMMENTS

- You should only submit your comments when you are happy no (further) changes are required.
  - You might wish to share and confirm your comments outside of iTrent before submitting them.
  - You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
  - When you submit your comments, the reviewee will receive an email notification.
  - You must submit your comments before the reviewee can add their Own comments.
- From the reviewer summary section of the form, click the Summary button, as below.

The screenshot shows the 'Performance review form REVIEWER SUMMARY (2 of 3)' screen. At the top, there are icons for refresh, print, and attachment. Below the title bar, there is a navigation bar with a left arrow, a 'REVIEWER SUMMARY' button with a dropdown arrow, and a right arrow. The main content area displays employee details: Employee name (Jennifer Anniston), Job title (Actor 280105), Reporting manager (Meryl Streep), and Reporting manager job title (Director 299700). Below this, there is a link to 'PDR Guidance Webpage here'. A paragraph of text asks the reviewer to record their final comments. Another paragraph states that once comments are saved and submitted, no amendments can be made. Below this is a section for 'Reviewer Summary Comments' with a text area and a horizontal line. At the bottom, there is a footer with four buttons: 'PREVIOUS', 'SAVE', 'SUMMARY' (highlighted with a red box), and 'NEXT'. A paragraph of text explains the process of saving comments and submitting the form.

Performance review form REVIEWER SUMMARY (2 of 3)

< REVIEWER SUMMARY >

Employee name Jennifer Anniston  
Job title Actor 280105  
Reporting manager Meryl Streep  
Reporting manager job title Director 299700

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?

Once you have saved and submitted your comments, you cannot make any amendments. Please share and confirm your comments with the reviewee if required before submitting.

Reviewer Summary Comments

Reviewer comments added here. You might want to share and confirm with your reviewee before submitting them.

Once you have recorded your comments, click the Summary button and then click the Submit button. This will save your comments and send a notification to your reviewee to let them know. They will then be able to access this form and add their own comments. Once the reviewee has updated and submitted the form, no further changes can be made. You can continue to update work and development objectives throughout the year via the Objective Summary screen in Manager Self-Service.

PREVIOUS SAVE SUMMARY NEXT

- The review form summary screen will open as below.
- Click the Submit button to submit this section of the form.

Performance review form PDR Form

✓ REVIEW DATE  
✓ REVIEWER SUMMARY  
✓ REVIEWEE SUMMARY

Summary >

START SUBMIT PRINT DELETE

- You will be asked to confirm this action.
- Click OK to submit or Cancel to exit without submitting.

hrss10-dev.leedsbeckett.ac.uk says

You are about to submit this form, select OK to continue or cancel to return to the form

OK Cancel

- Once you submit this section of the form will display a message that it cannot be modified, as below.

This review form is now complete and cannot be modified.

Performance review form REVIEWER SUMMARY (2 of 3)

< REVIEWER SUMMARY >

Employee name	Jennifer Anniston
Job title	Actor 280105
Reporting manager	Meryl Streep
Reporting manager job title	Director 299700

Further support and guidance and be found on our *PDR Guidance Webpage here*