

Overview

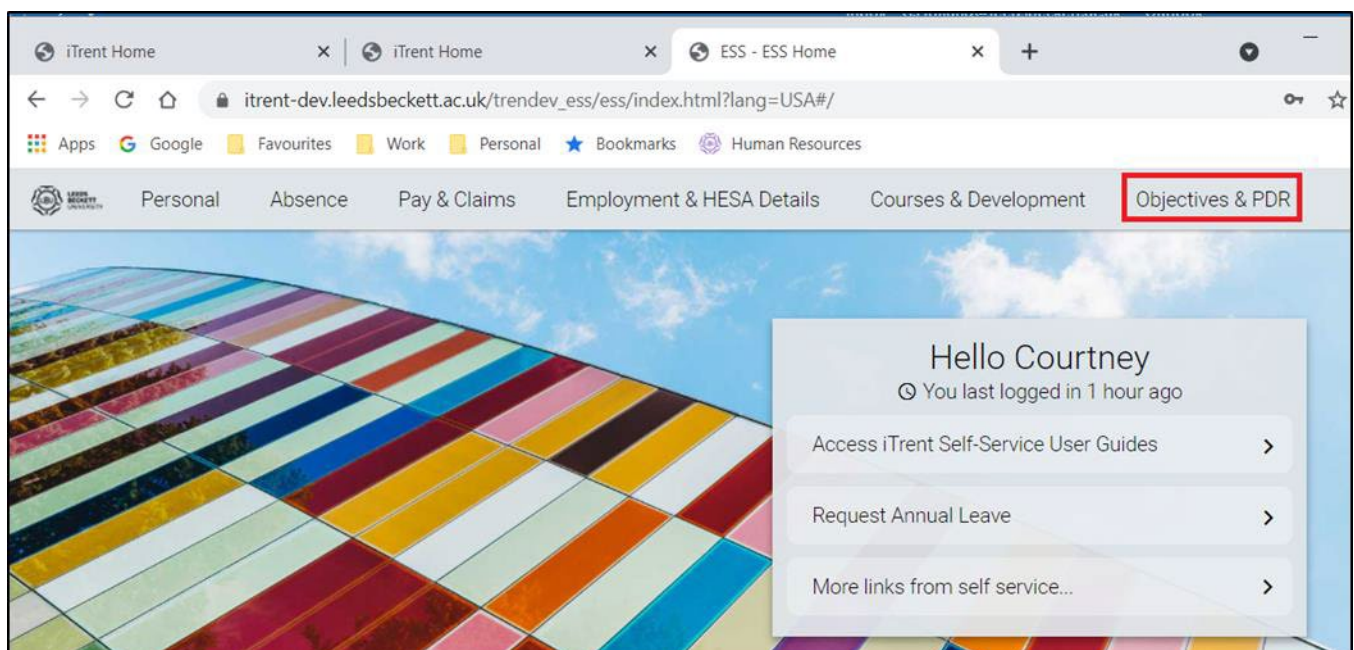
- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, you need to generate the review lifecycle and record the PDR discussion date.
- We recommend that you record the discussion date after the meeting takes place.
- You must submit the Review 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 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 Objectives & PDR menu option, as below.



- Click on the review lifecycle tile, as below.

Objectives

Form name	Start date	Target date	Linked to	Current status	Actions	Progress	Comments
Implement new PDR System...		31 May 2021		Authorised	Actions	Progress	Comments
Objective 3		25 Apr 2021		Authorised	Actions	Progress	Comments
Objective 4		31 Aug 2021		Authorised	Actions	Progress	Comments
Objective 5 description		31 Jul 2021		Authorised	Actions	Progress	Comments

Review lifecycles

PDR 2021 0.1

Start date
1 Sep 2020

Current stage
REVIEW DATE

Stage target end date
4 Mar 2021

Stage owner
Courtney Cox

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

Lifecycle PDR 2021 0.1

PDR

REVIEW DATE

Target end date: Thursday 4 March 2021

Action responsibility: Courtney Cox 116591

iTrent can support the recording of key aspects of your PDR discussions. This section enables the reviewer and reviewee to record a summary of this year's PDR conversations. Objectives can be updated separately in the objectives area of iTrent Employee Self-Service and Manager Self-Service. Further support and guidance can be found on our PDR Guidance Webpage [PDR Guidance Webpage](#)

REVIEWER SUMMARY

REVIEWEE SUMMARY

PDR Complete

- 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.

Review Date

Please record the date of your PDR discussion below.

Review date 16/09/2020

Once you have recorded the date, click the Summary button and then click the Submit button. This will save the discussion date and enable your manager to complete their comments.

Note for colleagues with a PDR reviewer who is not their manager: your PDR reviewer does not have access to your details in iTrent, therefore please make a note of the review date in the above field and complete your PDR comments with your reviewer using the Word template here (link to be inserted). For guidance on how to upload the Word document to iTrent, please click here (link to be inserted)

Previous Save **Summary** Next

- 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.

Lifecycle PDR Form

REVIEW DATE
 REVIEWER SUMMARY
 REVIEWEE SUMMARY

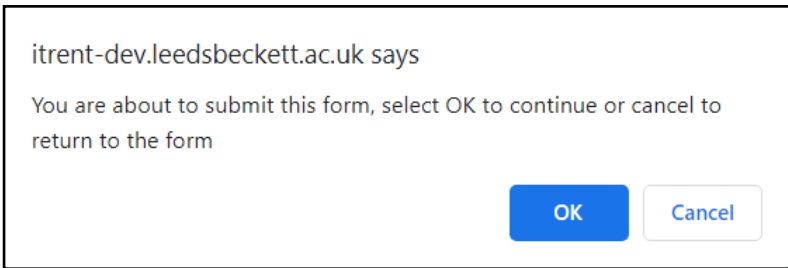
Click here to return to the performance life cycle

Summary >

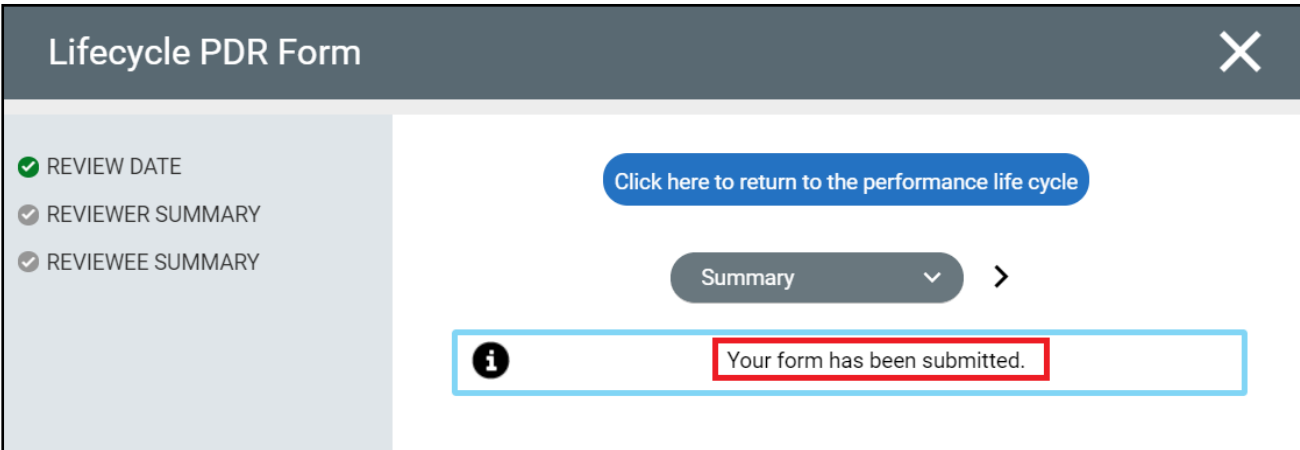
Start **Submit** Print

SUBMIT YOUR PDR DISCUSSION DATE

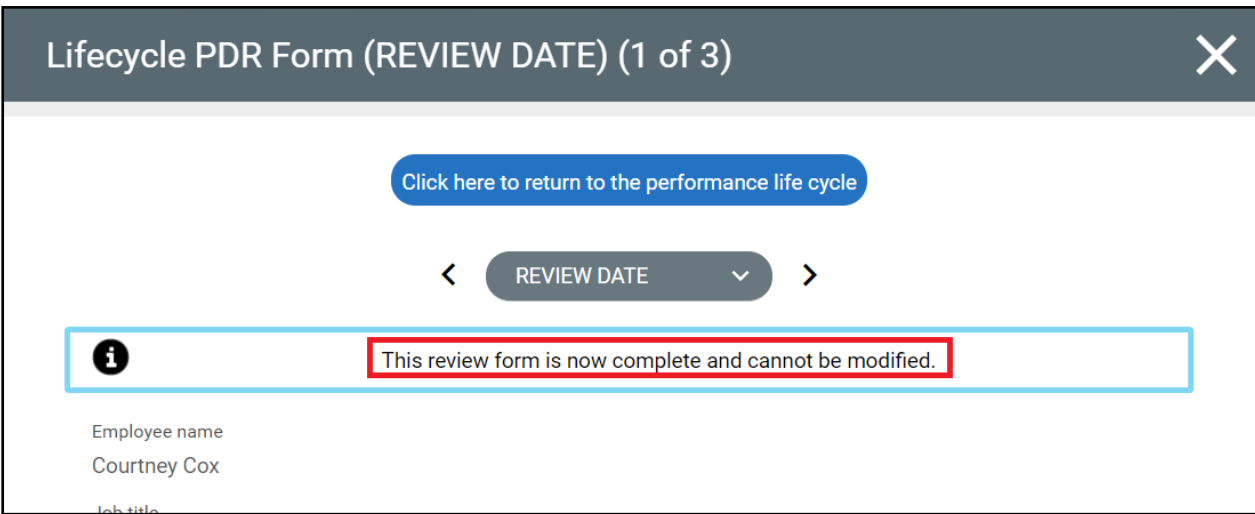
- When you click Submit, you will be asked to confirm that you wish to submit, as below.
- Click OK to submit or Cancel to exit without submitting.



- 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.

