Simplified Guide for Managers – To Complete Performance Appraisals onto the iTrent System

Please refer to the Performance Management People Manager Guidance for full guidance and screen shots on using the performance appraisal system on iTrent. This can be found on the intranet, under the HR Direct tab on the HR systems & Performance Management section then in the performance management folder.

Managers must complete these stages to attach a lifecycle:

- Open iTrent People Manager
- Click on people search at the bottom left hand window and type in the surname of the Employee, click the magnifying glass to search and select the name of the employee.
- On the bottom left hand window, click on reviews and click on attach Lifecycle to person.
- On the right hand window – click on the magnifying glass where it reads Lifecycle.
- A list of the available Lifecycles will show and you will need to select the Lifecycle that is applicable to you and press save. Please keep the attachment date as the date you attach the lifecycle.
- At the bottom left hand window – click on Performance Lifecycles
- In the right hand window, choose the job title and click save

If the employee is completing the appraisal form:

- If you have selected a Lifecycle that begins with Employee this will now be sent to the employees iTrent self service for them to complete.
- When you complete the performance appraisal this will need to be done in the employee's iTrent self service
- Once the employee has completed the appraisal form the content should be discussed with the manager and once in agreement and the actual performance appraisal has been conducted, the form can then be submitted

Please note that once submit has been pressed the form becomes locked and un-editable

If the manager is completing the appraisal form – continue the below

- The screen will change
- The right hand window will show the Lifecycle in button format
- Click on the + button – "Carry out Annual Appraisal meeting" – this will expand
- Hover mouse over the button which says Manager completes online appraisal form – green button "Generate" will appear on the right

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- Click on the green generate button – the form will generate in the background so you should now click on "Manager completes online appraisal form"
- The form opens showing each stage in blue
- Click on the start button
- You can navigate through the document by clicking the large arrows at the top of this right hand window or use the Next and Previous buttons

Section 1 – Personal and Job details

- Complete the page

Section 2 – Current Objectives

- Current objectives can be updated by clicking on the highlighted blue title and this will take you to a new screen where the current objectives can be updated / changed either by text or the drop down menus – *please note that blue boxes are mandatory fields.*
- The Progress section will be where you need to enter the evidence against that objectives.
- To navigate back to the form click on the **x** of objectives details tab at the very bottom of the right hand window to close

Section 3 – New Objectives

- New objectives are to be entered here.
- You can select either personal or from the catalogue (please see full guidance for creating a catalogue) This will take you to a new screen where the current objectives can be updated / changed either by text or the drop down menus
- You will need to ensure that when completing a personal objective or from the catalogue, all blue fields are completed.
- To navigate back to the form click on the **x** of objectives details tab at the very bottom of the right hand window to close

Section 4 – Competencies

- Scroll down and click on the relevant buttons and input relevant examples

Section 5 – Competencies (2)

- As above - Scroll down and click on the relevant buttons and input relevant examples

Section 6 – Competencies (3)

- As above - Scroll down and click on the relevant buttons and input relevant examples

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Section 7 – Training Details

- This screen shows any external courses that the employee has inputted via iTrent Self Service or by the corporate training team. You can also book learning events and add to waiting lists
- Complete as appropriate

Section 8 – Development

- Input answers in the relevant boxes

Section 9 – Comments

- Complete relevant boxes
- If you are satisfied that you have entered all relevant information, click summary and submit – **once you have clicked the submit button you cannot make any changes**.
- Click ok – This sends an automatic email to the employee to complete their comments.
- You can now close the form by clicking on the organisation bar at the top of the page.
- Once the employee has completed their comments you will be notified by an email.

If you wish to view the completed appraisal form:

- Highlight the employees name
- Click reviews
- Performance lifecycles
- Lifecycle
- The lifecycle will appear for you to access the completed form

Please note you cannot make any amendments once the form has been submitted

Manager – How to fill your comments on iTrent People Manager when an appraisal has been completed by your employee

All managers are required to complete their comments on the iTrent People Manager system

- Open iTrent People Manager
- Click on people search at the bottom left hand window and type in the surname of the Employee, click the magnifying glass to search and select the name of the employee.

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- On the bottom left hand window, click on reviews and click on attach Performance Lifecycles
- Select the appropriate lifecycle
- Your screen will then change to the button format
- Click on the + button – "Carry out Annual Appraisal meeting" – this will expand
- You will see that employee completes online appraisal form is green and you can view the appraisal but you will not be able to make any amendments.
- Hover mouse over the button which says manager comments form – green button "Generate" will appear on the right
- Click on the green generate button – the form will generate in the background so you should now click on "Completes comments form"
- Click start – input your comments
- Click on summary – click submit - then OK
- Your employee
- will receive notification of its completion.
- **Please note that once submit has been pressed the comments box becomes locked and un-editable**