

## **Performance Management People Manager Guidance**

### **Full View Icon**



Throughout the performance management module you may find that you want to make the screen larger so that you can view the form more easily. To make the form larger please click on the Full View Icon from the top right hand corner of iTrent. This will then change your page so you no longer have the panels on the left of the screen. To revert the screen back to how it is originally set then you just need to click the Full View Icon again.

### **Further Guidance**

Further information on performance management and detailed information on the competencies can be found on the intranet on the HR Direct page.

### **Access**

If you have logged into the system and do not have the correct access or if you or your employees do not know the username and password for the system please contact HR Direct for these to be confirmed / changed.

### **Appraisal Date Only, Not Eligible and Lifecycles/Full Forms**

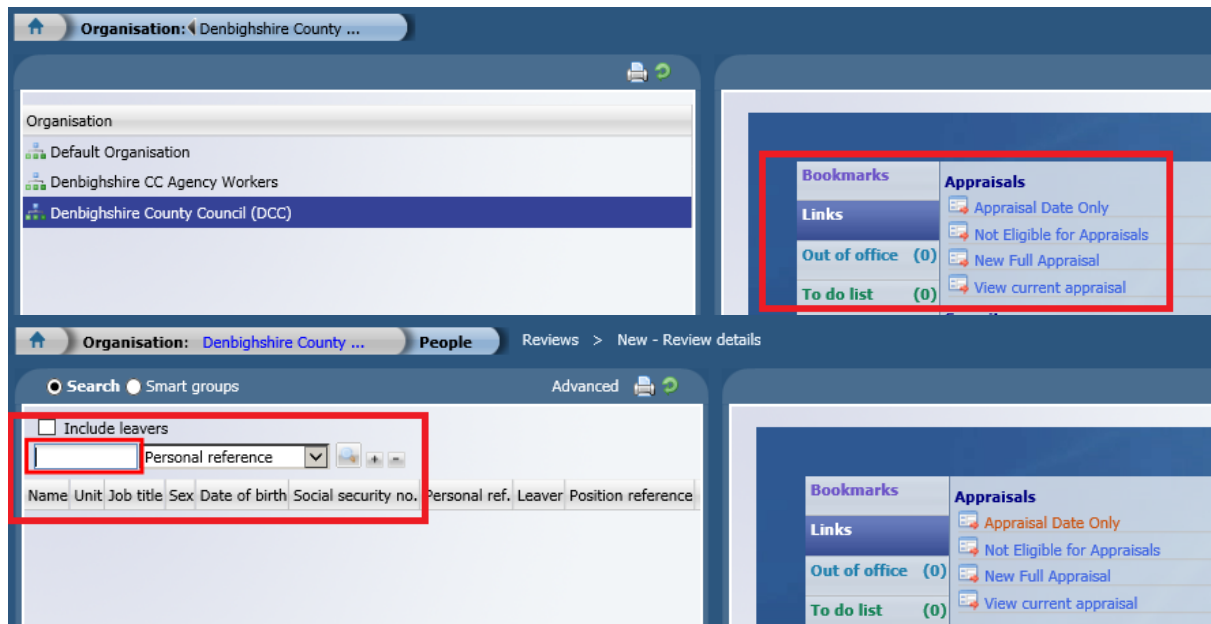
If an employee is not eligible for an appraisal then this must be entered into the system to ensure those employee do not show on the report as a blank entry. An employee might not be eligible for an appraisal for various reasons such as being on maternity leave, on long term sick, new to role or on sabbatical.

Please note that how you capture just the appraisal date only and if an employee is not eligible for an appraisal has changed. Details on how to enter this information and the normal full appraisal is explained below.

There are shortcuts to inputting appraisal information on your iTrent homepage Links folder. Your homepage is the first screen you see on the right hand side when you have logged onto the system.

These shortcuts will take you to the pages where you can enter or view information on appraisals in the system.

Once you have clicked on a link you will be asked to input the employee name, job title or number into the system, a red box will surround the search field. These shortcuts are Appraisal Date Only / Not Eligible for Appraisal / New Full appraisal form / Current appraisal form. Depending on which is selected will depend on which part of the system it takes you too. (Following screenshots show the link options)



## Process

1. Click on link e.g. Appraisal Date Only
2. Enter employee search details
3. Select Annual Appraisal Date Only from the drop down list next to Review Type
4. Enter Date of Appraisal into Date Occurred date field
5. Enter Date of Next Appraisal into Next Review Date (12 months from date occurred)
6. Click Save

For Not Eligible Appraisal the date occurred field will need to be the date the person is not eligible from and the next review date will be the date they become available. For example, if they are not eligible because they are a new starter the date occurred will be their start date and the next review date will be 6 months after that start date.

For the full appraisal this will take you to the attach lifecycle page where you can select the lifecycle you wish to use, if you want to include one to one forms and if you want it to be completed by an employee.

If you wish for an employee to enter their information onto the appraisal form via iTrent Self Service you will need to choose the lifecycle with the Employee – at the beginning of the name and then save the lifecycle to the employee’s job, at which point the employee will then have access to complete the form. The employee should not submit the form until it’s been agreed at the appraisal meeting.

Please note that the list of lifecycles have been reduced and if you wish to include one to one forms within the system please select the lifecycle that has monthly one to ones within it. Even if you only wish to use 3 of the forms for example for quarterly one to ones then this is fine as you would just not complete the rest of the one to one forms within that lifecycle.

## Lifecycles & Full Forms

Throughout the guidance it will talk about Lifecycles and Forms, the Lifecycle is a term used by the system which links together actions such as the completion of tasks, the annual appraisal form and the one to ones forms all in one process so it is easier to navigate through the different tasks and the process. The Forms are the documentation that captures the discussions you have with your employees such as the one to ones and the annual appraisal.

You will need to attach the correct Lifecycle that is applicable to you and your team. We have built a number of Lifecycles to accommodate the different ways in which people work. If your employee does not have access to a computer, i.e. is not office based, we have a Lifecycle which does not have tasks for employees to complete via Self Service. A list of the various Lifecycles is below – please ensure you choose the correct lifecycle.

Within a number of Lifecycles we have included email notification to the employee and the manager when various tasks are completed. We understand however that not all employees have their own individual email address or access to emails at all, therefore anyone who does not have a designated email address will not be notified so you will need to ensure that you communicate with your employee when you have completed a task or they are required to action something within the system.

In terms of the One to One forms they are very similar to the annual appraisal form however it is not in as much detail. You can use the one to one form to suit you and your team. If parts of the form are not applicable to your team then it is not mandatory for you to fill in the information and you can populate the fields to suit the requirements you have.

If you want to start a lifecycle half way through or you want to skip one or more of the one to one forms for various reasons you are able to do this however it does mean you have to go through the process, including the forms and just leave all the fields blank. There are no mandatory fields within the forms so it will allow you to submit it even though it is blank. However, please note that if you have chosen a lifecycle that includes the employee completing their comments via Self Service then you will need to let them know when to action that.

## Lifecycles

<b>Name of Lifecycle</b>	<b>What it includes</b>
Short Form Appraisal Only <i>This lifecycle is only to be used with Head of Service Approval</i>	Shortened annual appraisal form that only consists of Objectives and Competencies. This is for staff who have the same or very similar objectives against them and who do not have access to Self Service. Head of Service approval is required to use this Lifecycle.

One to Ones / Supervision - Monthly	One to One forms only, 11 forms. To be completed by the Manager in People Manager
One to Ones / Supervision - Quarterly	One to One forms only, 3 forms. To be completed by the Manager in People Manager
Employee - Appraisal & Mid Year Review <i>Only for employees who have access to Self Service</i>	Annual Appraisal Form to be completed by the Employee via Self Service, with Managers comments to be submitted via People Manager followed by 1 One to One Form which is to be used as the mid year / Interim Review and completed via Self Service
Employee - Appraisal & Monthly One to Ones <i>Only for employees who have access to Self Service</i>	Annual Appraisal Form to be completed by the Employee via Self Service, with Managers comments to be submitted via People Manager followed by 11 One to One Forms to be completed by the Employee via Self Service
Employee - Appraisal & Quarterly One to Ones <i>Only for employees who have access to Self Service</i>	Annual Appraisal Form to be completed by the Employee via Self Service, with Managers comments to be submitted via People Manager followed by 3 One to One Forms to be completed by the Employee via Self Service
Employee – Appraisal Only <i>Only for employees who have access to Self Service</i>	Annual Appraisal Form to be completed by the Employee via Self Service, with Managers comments to be submitted via People Manager
Employee - Monthly One to Ones / Supervision Only <i>Only for employees who have access to Self Service</i>	One to One Forms only, 11 forms. To be completed by the Employee via Self Service
Employee - Quarterly One to Ones / Supervision Only <i>Only for employees who have access to Self Service</i>	One to One Forms only, 3 forms. To be completed by the Employee via Self Service

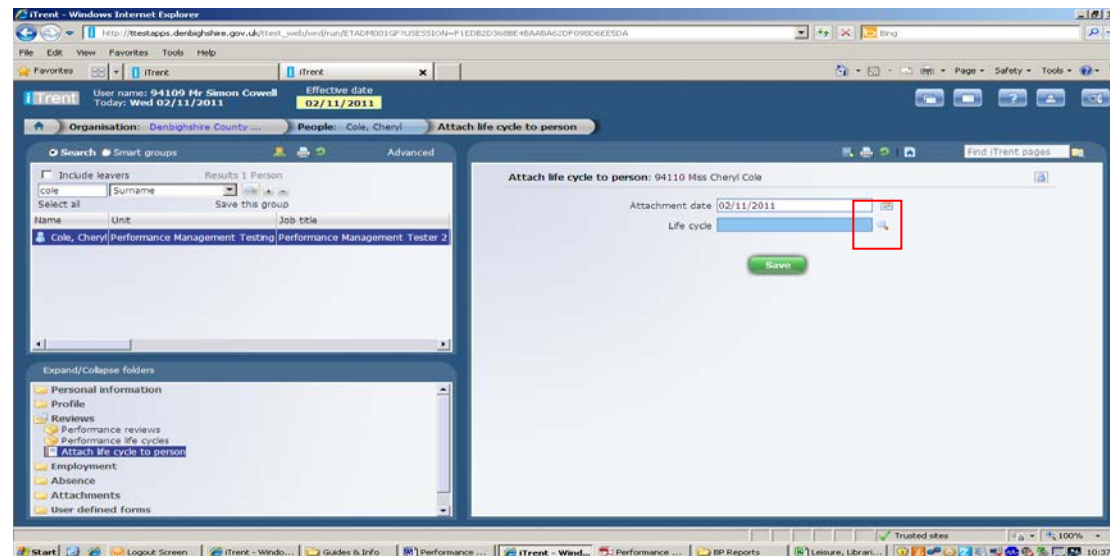
**Please note that attaching a Lifecycle must still be done by the line manager even if a Lifecycle chosen is where the employee completes the form via Self Service. A Lifecycle can only be attached via People Manager. Once the lifecycle has been attached the line manager will need to assign it to a position before the employee will be able to view it in Self Service.**

Screen shots are provided throughout the guidance, however, it may be due to the size of the screenshot that it appears on the following page to the written guidance.

## Attaching a Lifecycle to an Employee

*Organisation Structure → People → Search for the Employee & select them  
→ Attach Life cycle to person*

- Search for your employee
- Navigate to the Reviews folder,
- Within that folder you will have an option that is *Attach Life cycle to person*. You will need to select this option:



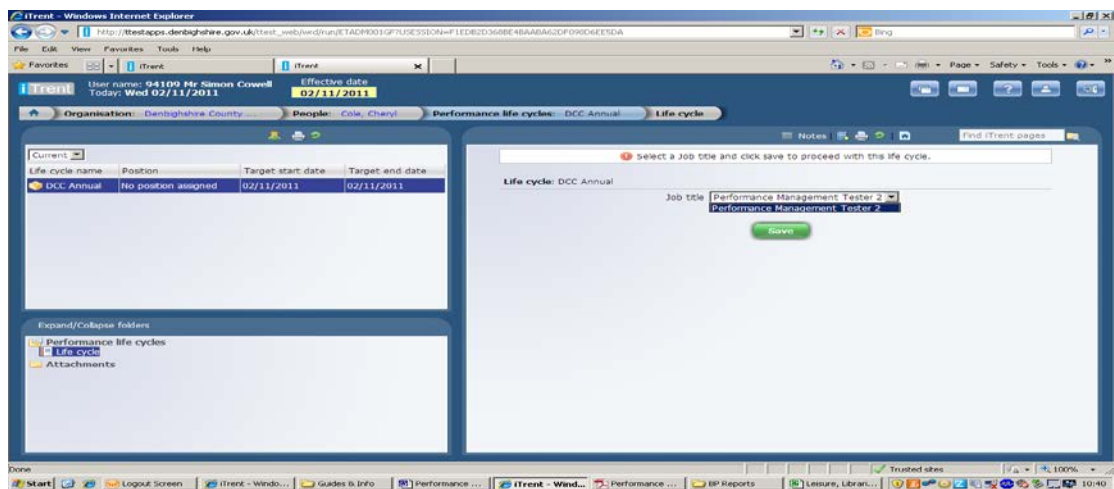
- Once on this screen you will need to search for the Lifecycle you wish to attach.
- Do this by clicking on the magnifying glass on the right hand side of the screen (highlighted in red above)
- Once this is selected you will get a list that appears with the selection of Lifecycles. Once you have found the one you want you will need to click on it. Please remember to only select those that start with DCC
- Click Save – This then attaches the Lifecycle to the employee – nothing will change on the screen other than to say the Changes have been Saved.

## Attaching the Lifecycle to a Position and Viewing the Lifecycle

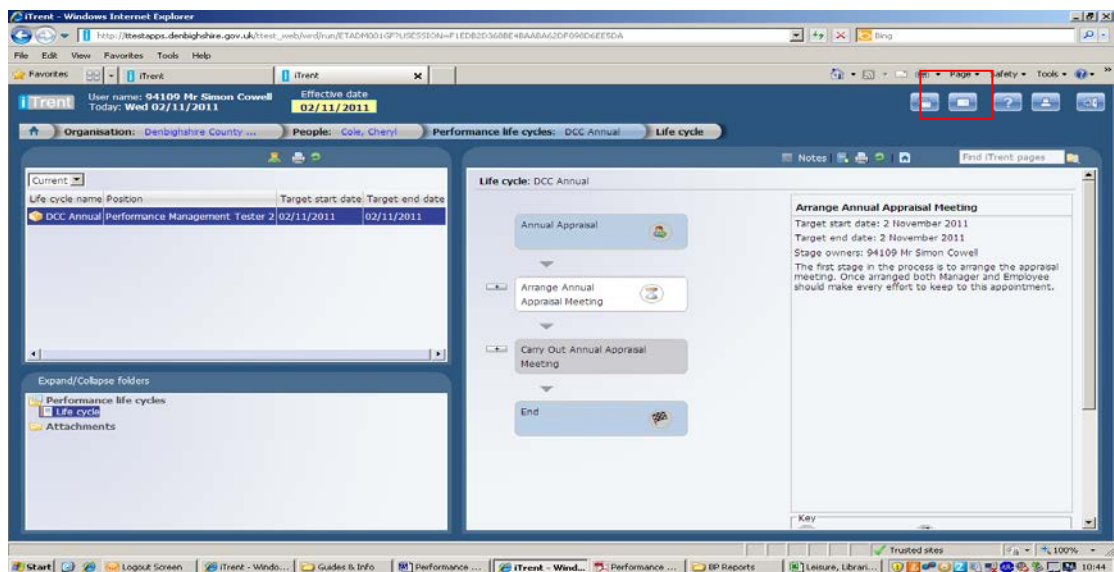
*Organisation Structure → People → Search for the Employee & select them  
→ Performance Life cycles → Select the Lifecycle you wish to use (the most recent will be at the top of the list) → Life cycle*

- Navigate to *Performance Life cycles* within the Reviews Folder
- Here it will list any Current Lifecycles that are attached to the employee you have selected, the most recently attached will be at the top of the list
- When you first attach a Lifecycle it does not automatically attach the job the employee is in and that you are using to review

- Click on *Lifecycle* from the bottom left hand panel and this will then ask you to select the Job Title you wish to associate with the review process. It will do this even if the employee only has one job



- Select the Job
- Click Save
- Once you have clicked on Save the page will change and present you with the Lifecycle you have selected



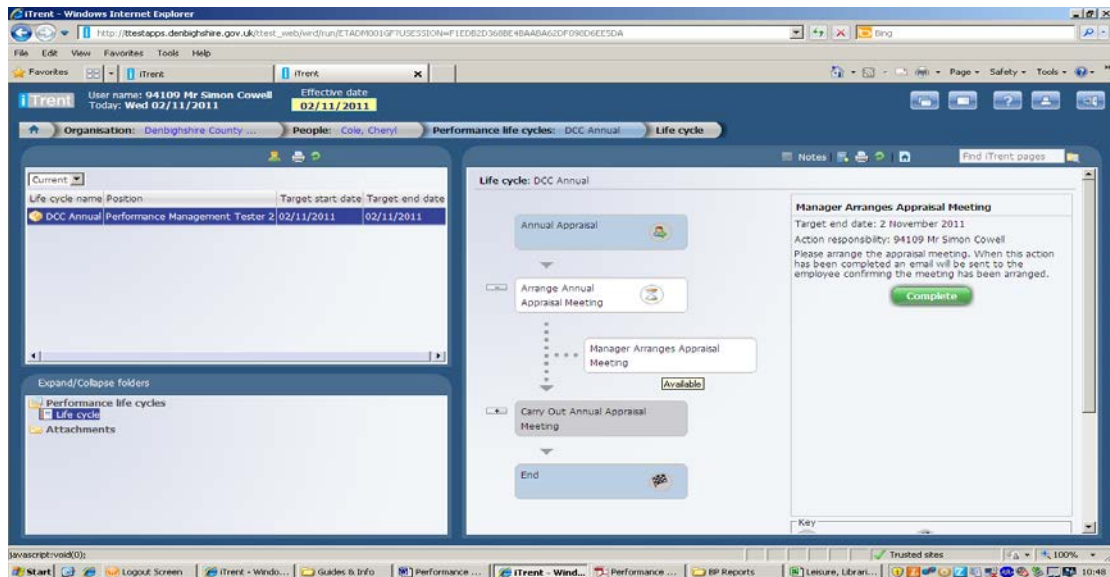
- You can make the screen larger at this point if you find it easier to see by clicking on the Full View Icon which is located in the top right hand corner of your screen (highlight in red above)

Please note that what appears on the screen will be dependant on which Lifecycle you have chosen.

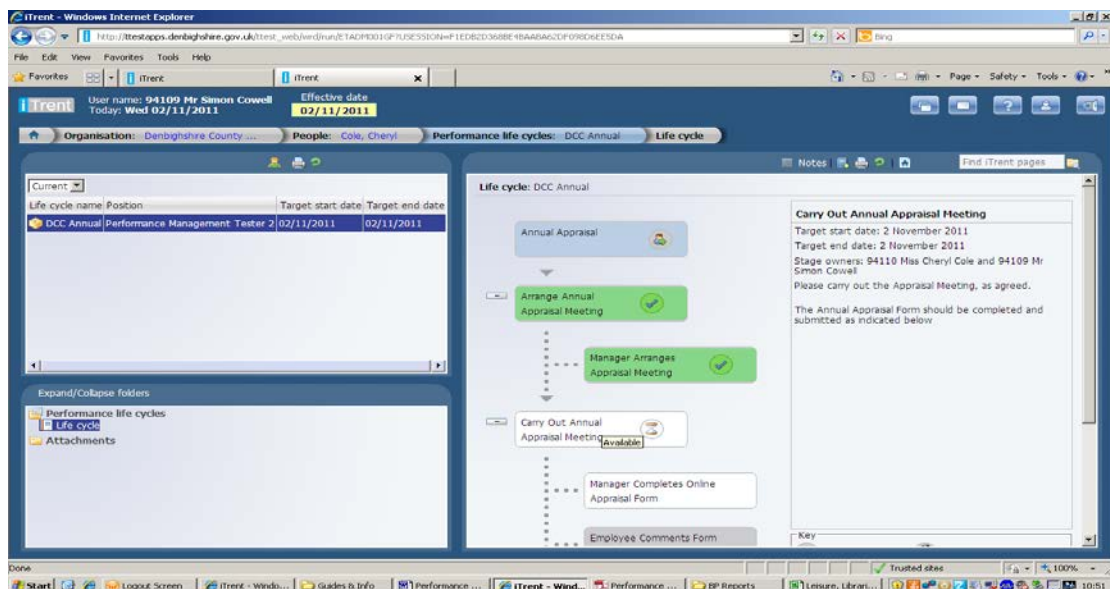
As you hover over the different sections of the Lifecycle you will see that the description on the right hand side of the page changes, this is to explain each

stage. This description panel will also show the buttons you will need to use to Generate Forms and Complete Stages.

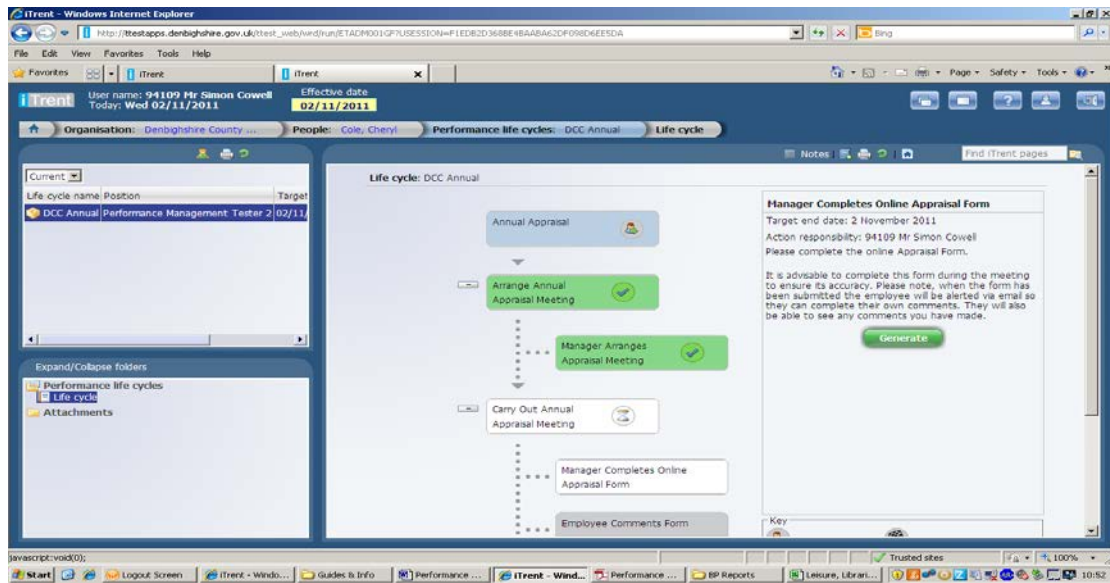
Each Stage will have further tasks that will take place and then will allow you to move onto the next stage. To see the various stages throughout the Lifecycle you will need to select the + icon. This will then open up the Stage and normally the description panel will have a Generate or Complete button on for you to select.



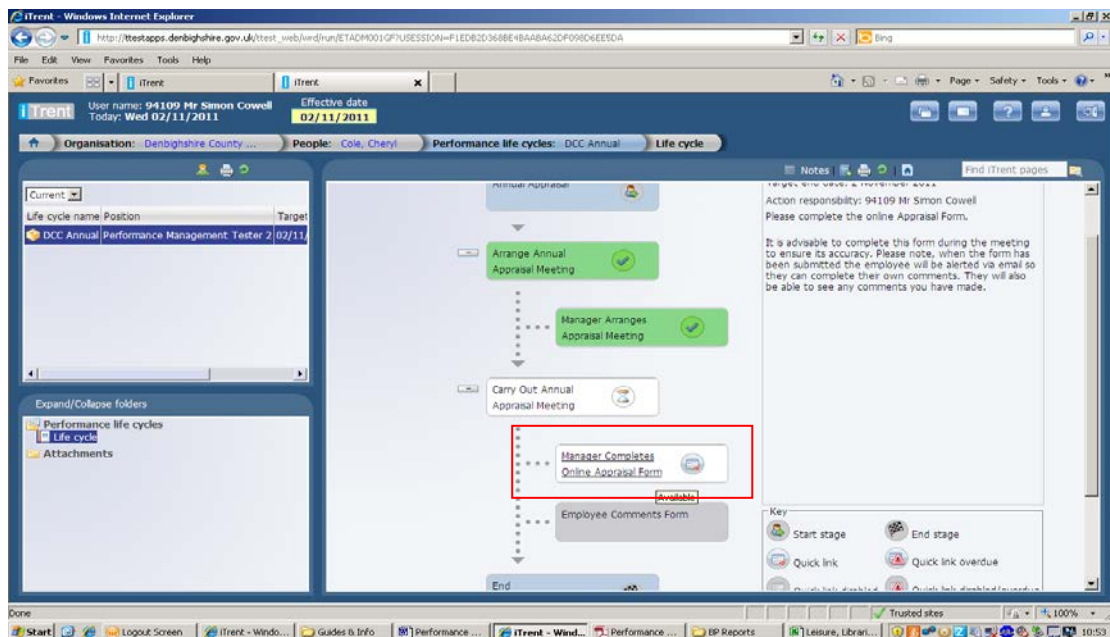
Once you complete a Stage you will be able to move onto the next Stage which will be currently greyed out and not active. It will also change the colour of the completed stage to green and produce a tick symbol.



When you get to a stage where a form is attached you will see a Generate button on the right hand side of the lifecycle.

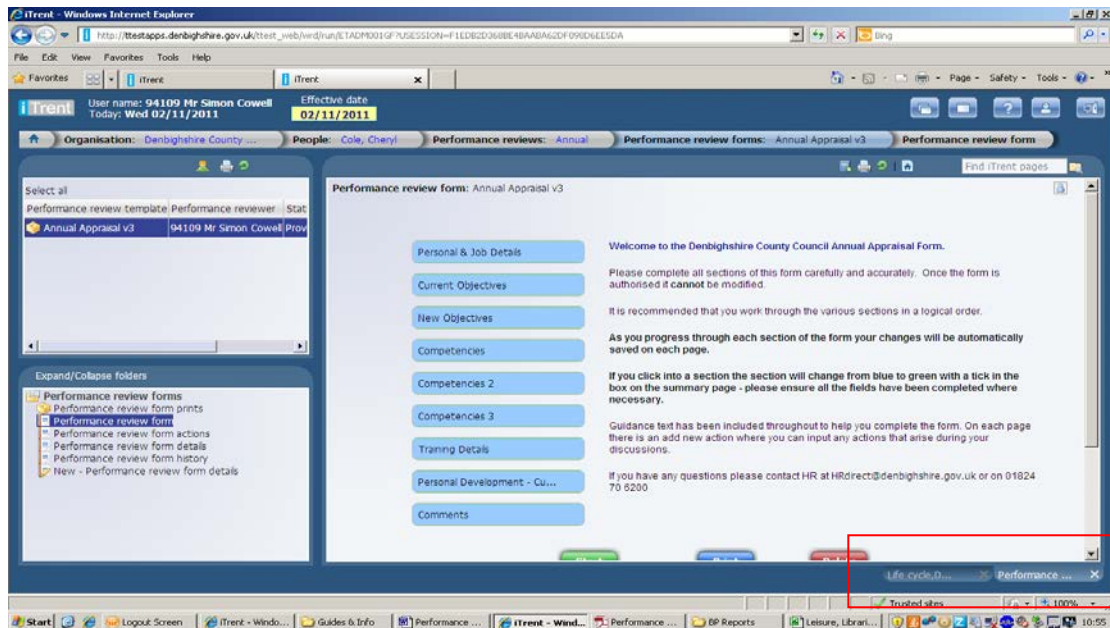


Once this Generate button is selected it will change that stage to being available and the stage itself needs to be selected – it will become underlined when you click over the stage and when you hover over it the word Available will be present.



Once you click on the stage it will navigate you to the Form that is associated with that Stage. The system opens up a new tab view. You will see the tabs from the bottom right hand corner of your screen.





You can now go on and complete the Form by clicking the Start button.

## Completing the Forms

The first page that you see of the Form is the Summary Page which will give some detail about the form and who to contact if you have any problems. You can navigate back to here throughout the Form using the Summary button that appears at the bottom of every page, or the drop down option at the top of the pages.

The way you complete the forms within the system is the same for each form, whether it be an Annual Appraisal Form or the One to One Form.

Please ensure you click the save button periodically throughout the form. If you have not typed for a while into the form because discussions are taking place please click the save button so the system does not log you out of the system and to ensure you do not lose any unsaved information.

You will not have a Submit button until you have been through all of the pages of the form.

When you have been into a page the page will turn from blue to green on the Summary page, please note this does not necessarily mean you have entered information onto that page just that you have viewed it. There are no mandatory fields within the form.

Click the Start button to start the review Form or alternatively click on the first page you need to complete.

To navigate through the form you can use the Arrow Buttons, Next/Previous buttons or the Drop Down List.

Please ensure you scroll to the bottom of each page of the form as some of the pages are longer than others, such as the information on the Competencies.

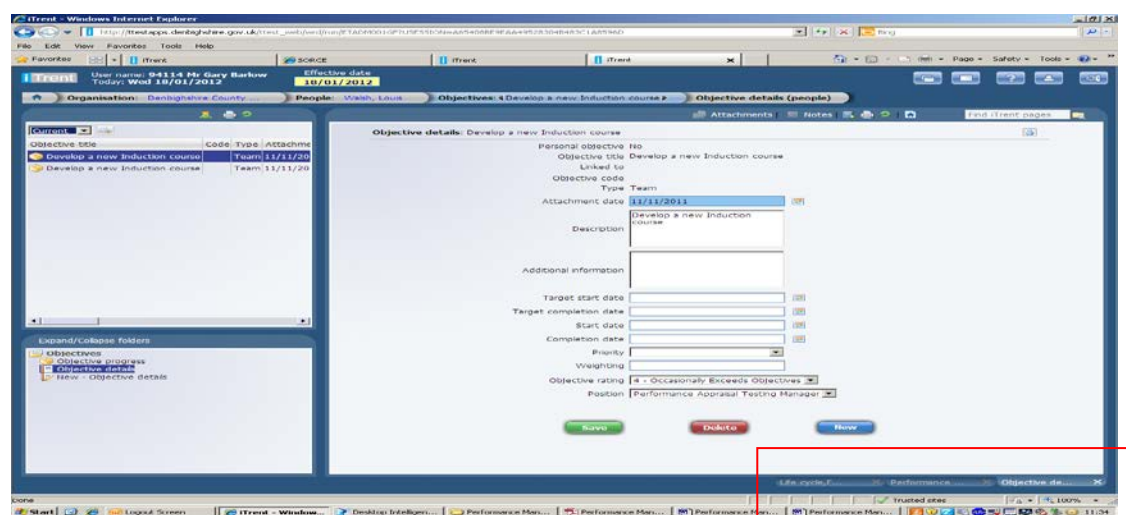
## Pages within the Form

**Personal and Job Details** – This will include information on the employee's job details such as hours, job title and location. If any of this information is incorrect you need to inform HR Direct with the correct information and the date of the change if applicable. If the Job Description is inaccurate and needs to be amended then the HR Pay and Rewards Specialist will need to be informed as the job may need to be re-evaluated.

**Current Objectives** – The first time you use this page it will more than likely be blank as it shows any objectives that have been set against the employee for the review period. As you begin to use the form the following review period will more than likely have current objectives saved on this page.

When there are objectives on this page you can update the Objective itself, along with the priority and score by clicking on the title of the Objective. You can also update the progress of the objective by selecting Add New Objective Progress.

Please note that if you select to update the objective or the objective progress then once the option has been selected the system will open up a new tab for you to edit the details:



You can then update the information you require, save it and then you will need to close down that tab by clicking on the X icon on the bottom right hand corner of the tab. It will then navigate you back to the form.

At this point the form will not automatically update the form with the new information, you will need to navigate forwards or backwards on the form and then come back to the page to see that it has been updated.

**New Objectives** – Here you can set new objectives for the forthcoming review period. Objectives can be set a personal level or at a team level.

*Please note that if you want an objective to be available for your team as a whole you will need to set this up outside of this process. For further information please see the Objectives section within this guidance.*

On this page are a number of fields you will need to populate:

- Type – This is Personal or Catalogue. Personal will be specifically for the employee. If you choose Catalogue you can choose from Objectives that have been set up previously within the system. This is what you would use if you had set Objectives up for your team.
- Objective Title – Name of the Objective. This is a free text box or can be used to search for the Catalogue Objectives. If you double click on this box, the box will become larger for the input to be seen more clearly.
- Objective Type – please just select anything here as this field will not be seen in the live environment
- Description – This gives further information concerning the Objective. If you double click on this box, the box will become larger for the input to be seen more clearly.
- Target Start and End Dates – Date fields that you can populate in order to monitor the progress of the Objectives. Please note that if you use these options the system will show that an objective is overdue if the current date goes past the target end date.

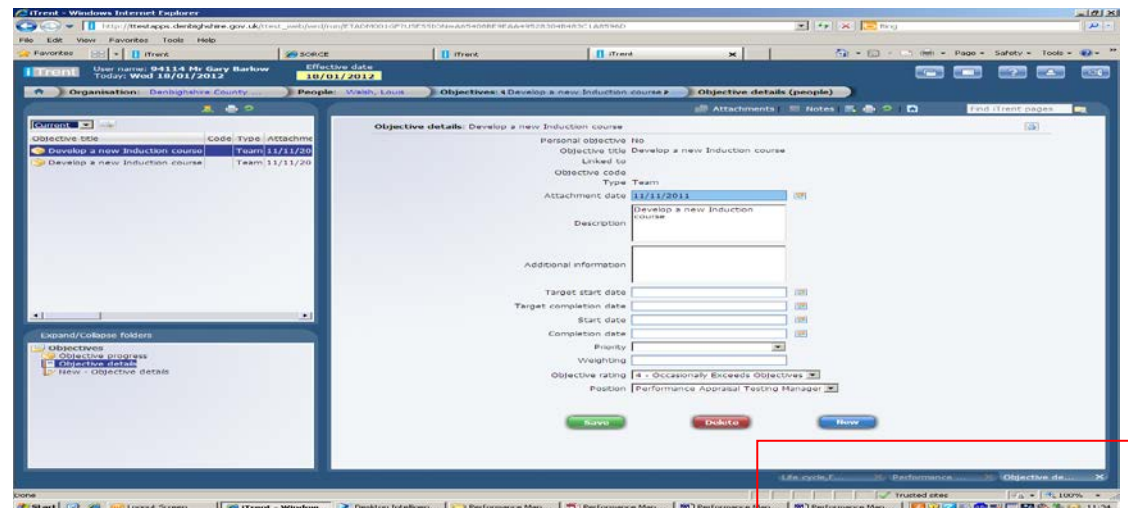
There is also a plus and minus icon on this screen for you to add in extra Objectives – you may need to scroll to the right of the page to view these icons. If you do not have any new objectives to add but you have click on something on this page, you will notice the fields are coloured (normally blue), this means the fields have become mandatory and you will need to click the minus button to make them non-mandatory.

**Competencies** – Please ensure you scroll down to the bottom of each Competency page to capture all the information required. There are numbers that sit behind the levels and the wording of the ratings in the system for reporting purposes. You will need to select what level you are scoring at, the score you are giving and also document the examples of how the employee has met the competency for the score given.

**Training Details** – This is where the training (internal, external and future) can be documented. Personal Learning Events are for courses that are done externally by the employee. The Employee can update this information themselves via Self Service at any time of the year and they will be pulled through on this page. Participant Events are any corporate courses that the employee has completed, bookings can also be put on via this form by clicking on Book a place on a learning event. Waiting Lists are only for the purpose of the employee requesting that they attend the course. The Corporate training teams will then assess the waiting lists throughout the year to see what corporate courses need to be run. It is still the employee's

responsibility to check availability of courses. Other future training is for noting any further requirements that have not already been covered by the corporate training options.

Please note that if you select to update any of the training fields then once the option has been selected the system will open up a new tab for you to edit the details:



You can then update the information you require, save it and then you will need to close down that tab by clicking on the X icon on the bottom right hand corner of the tab. It will then navigate you back to the form.

At this point the form will not automatically update the form with the new information, you will need to navigate forwards or backwards on the form and then come back to the page to see that it has been updated.

**Development** – This page covers development over the past 12 months and also what help, support and development will be required over the coming 12 months.

**Review Actions** – You will come to this very last page if you have used the navigation Arrow Buttons through the form. The actions are linked to the Objectives but can also be used if you wish for general actions that you agree with the employee. This may can remain blank if necessary, it is to be used to suit the team.

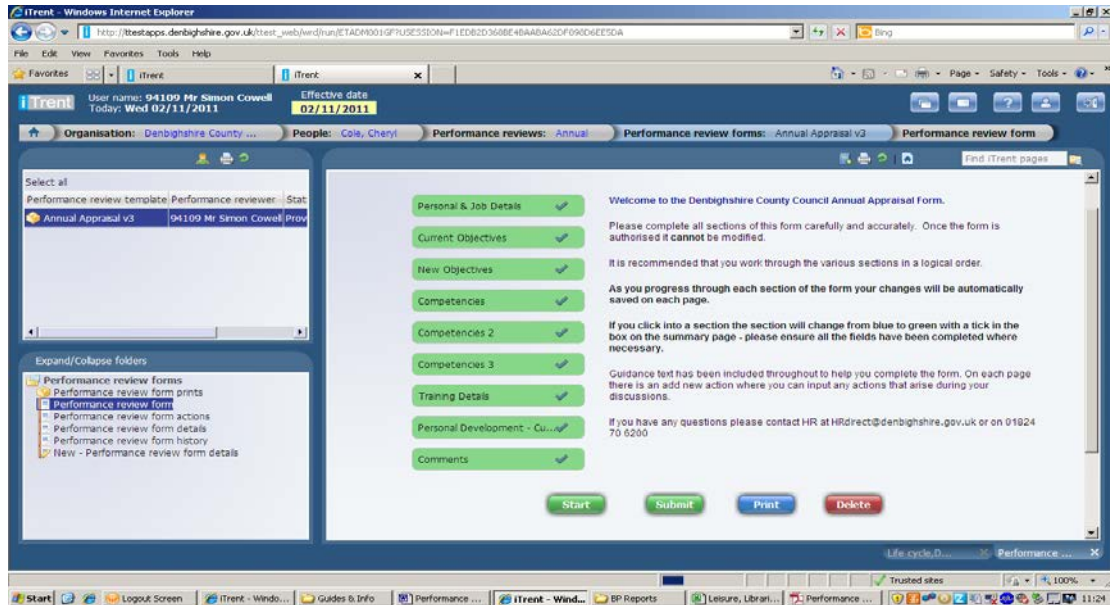
From this page you will need to use the drop down list to get back to the Summary page to ensure you have completed all pages.

### Submitting the Form

Once you have completed all of the pages in the form, on the Summary page the Submit button will now be visible. **Please note that once you have clicked on the Submit button there is no way of going back into the form to edit or**

amend any page. Submitting the form means agreement – if you can not agree then highlight this in the comments section

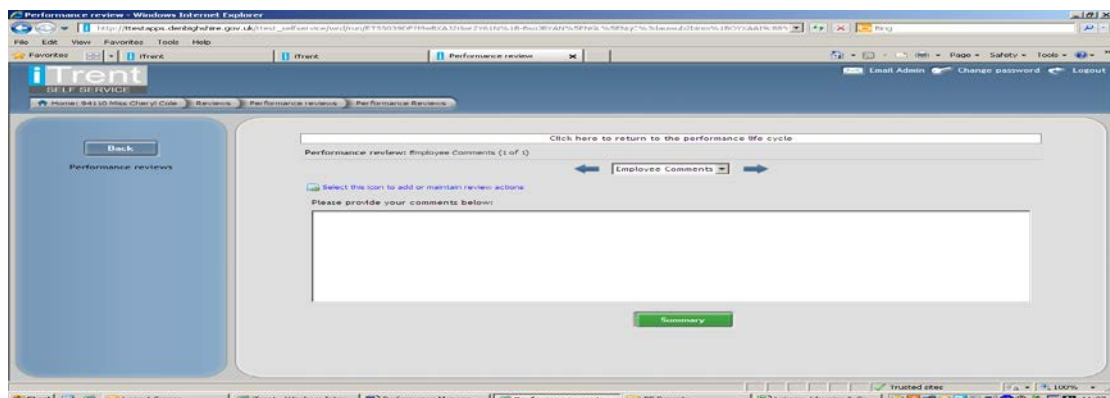
Once you have submitted the form you can go back in at a later date and view the form, you just will not be able to make any amendments. The employee will only be able to view the form via Self Service once it has been submitted.



**The Print button** – Once you click this you will get a pop up box to tell you Please wait whilst the print file is generated this may take a few minutes. How long it takes depends on how much data is stored on the form. However, the form will not go directly to print it will open up a pdf copy of the form and from there you can print the form. Please note the form will be at least 10 pages long as a minimum, again it will depend on how much data has been inputted into the form.

## Employee Comments Form

The employee will be able to view the Annual Appraisal Form that has been submitted but will not be able to edit or amend it. They will then complete the Employee Comments Form and submit it. Again, once the form has been submitted it will not be able to be amended.



Once this has been actioned you can carry on with the Lifecycle process, whether that is to finish the life cycle or to move onto the one to one forms.

## **Objectives**

Objectives can be set up outside of the life cycle and appraisal process. They can be inputted and updated throughout the year. They can be set for employees or for the team/service.

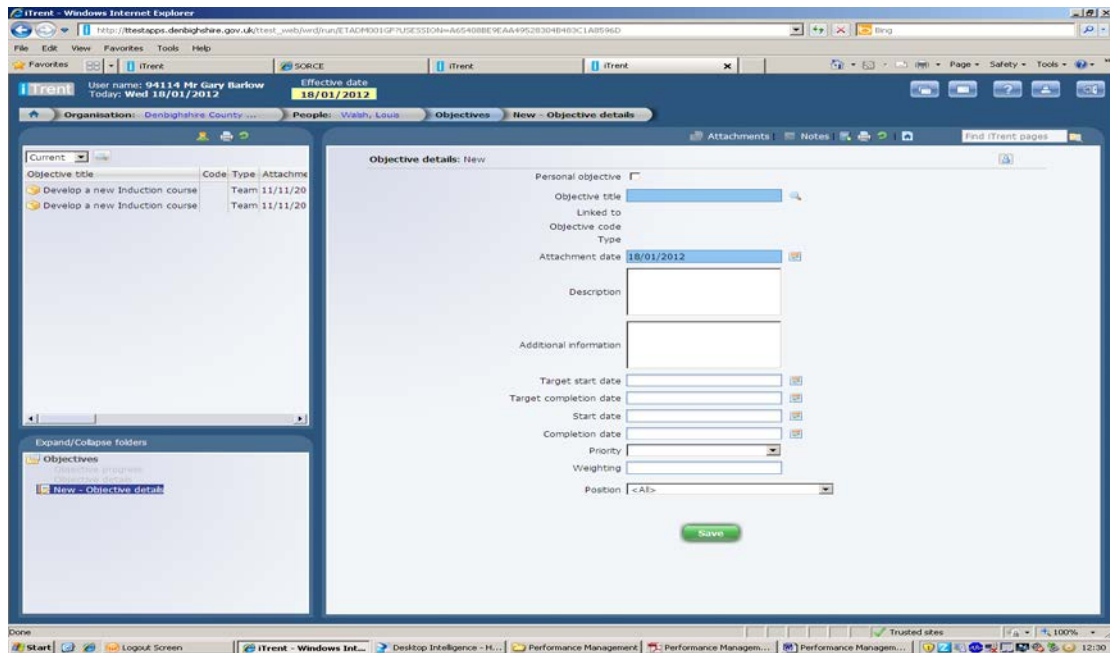
Please note that this is the only process you can use for setting up team/service objectives. (Employees personal objectives can be done throughout the appraisal and one to one forms.)

## **Employee Objectives**

*Organisation Structure → People → Search for your employee & select them  
→ Profile → Objectives → New – Objective Details*

Blue (coloured) fields on this form are mandatory, the other information is not.

- Personal Objective Box – you will need to tick this box
- Objective Title – once the box above has been ticked this field will change to be an editable field where you input the objective title.
- Type – This will be personal
- Attachment Date – this will default to be the date you are entering the objective, you can change this to be a different date if you wish, it will only be visible in the system from the attachment date onwards.
- Description – Please give the description of the objective here. This field is visible within the appraisal and one to one form.
- Additional Information – This can be used if there was further information that you did not want to have in the description. This field is not visible within the appraisal and one to one form.
- Target Start and Completion Dates – you can set dates if you wish on when the objectives need to be started and finished. These can be amended.
- Start Date and Completion Dates – These are for the objectives itself, if you put an end date in then this objective will not be visible after that date and it will not be visible in the system until the start date.
- Priority – High, Medium or Low
- Objective Rating Method – This will be set to objective rating (performance)
- Objective Rating – This will be the score of the objective
- Position – Select the job the objective relates to

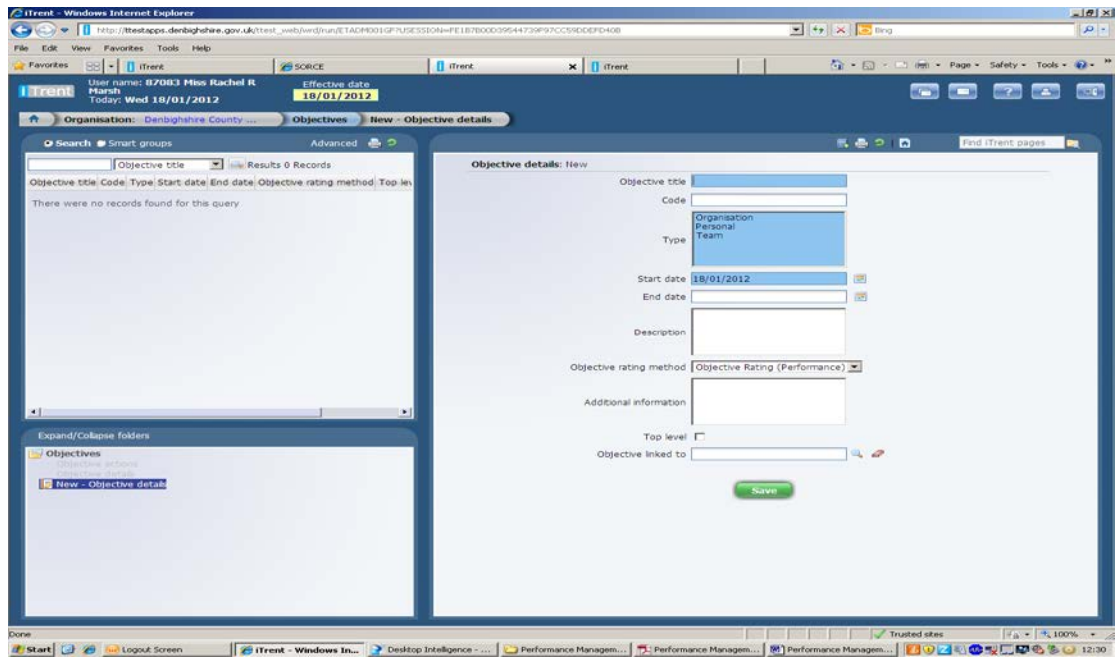


## Team / Service Objectives

Organisation Structure → Development → Objective → New – Objective Details

Blue (coloured) fields on this form are mandatory, the other information is not.

- Objective Title – once the box above has been ticked this field will change to be an editable field where you input the objective title.
- Code – This is the name of your Team or Service
- Type – This will be team
- Start Date – This will default to be the date you are entering the objective, you can change this to be a different date if you wish, it will only be visible in the system from the attachment date onwards.
- End Date – If this is used the objective will not be visible in the system after the end date
- Description – Please give the description of the objective here. This field is visible within the appraisal and one to one form.
- Objective Rating Method – This will be set to objective rating (performance)
- Additional Information – This can be used if there was further information that you did not want to have the in description. This field is not visible within the appraisal and one to one form.



Once these have been saved you will be able to use them within the appraisal form and one to one form.