



RHONDDA CYNON TAF COUNCIL

iTrent PERFORMANCE REVIEW SIGN OFF

Manager Guide

The Council's vision is for Rhondda Cynon Taf to be the best place in Wales to live, work and play, where people and businesses are independent, healthy, and prosperous.

The Council exists to provide strong community leadership and create the environment for people and businesses to be independent, healthy and prosperous.

Mae'r ddogfen yma ar gael yn y Gymraeg / This document is available in Welsh.



iTrent

Individual Performance Review: Sign off

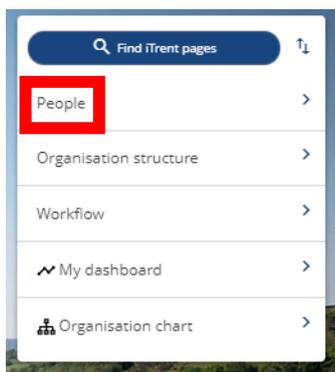
Guide for Managers (with access to staff on iTrent)

This a “how to” guide for managers who have completed an Individual Performance Review meeting with staff.

This guide will give you step-by-step instructions enabling you to:

1. Attach an Individual Performance Review Sign off form (Step 1 & Step 2)
2. Complete the form (Step 3)
3. Add/update Employee Objectives (not mandatory for sign off)

1. Attach the review form (Step1 & Step 2)

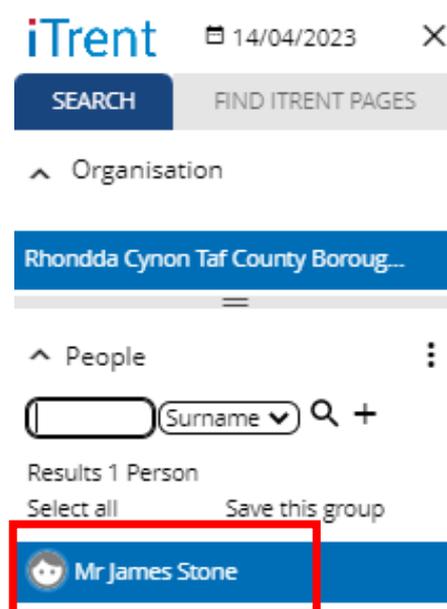


Log in to iTrent using your normal username and password.

Click on the “People” option on the menu on the right-hand side of your window.

Once you have clicked on “People” a list of the staff you have access to will appear on the left-hand side of your window (as shown here).

Select the staff member you wish to review.





Once the staff member is selected, the screen below will become visible.
Click on the “Annual Performance Review” option.

Mr James Stone

Personal
Known as James
Reckonable service date 01/09/2022
0 Year(s) 7 Month(s) in most recent service

Employment
Teacher - Mainscale | Grangehill - Teaching
32.50 hours | Employee | Full Time | Permanent | T001
Occupancy started on 01/09/2022
Reporting manager
Mr Peter Parker
Assistant Headteacher

Calendar
VIEW FULL CALENDAR
14 - 27 April 2023
14 15 16 17 18 19 20 21 22 23 24 25 26 27
25 of 25 days
Holidays remaining (as of last calculation)
0
No sickness (as of last calculation)

LINKS

- Personal information
- Profile
- Employment
- Payroll
- ESS questionnaire forms
- Holiday
- Sickness
- Other Absence
- Absence History (all)
- Maternity
- Paternity
- Shared Parental
- Adoption
- TOIL
- Annual Performance Review**
- Learning & Development

Clicking the “Annual Performance Review” option will open the Performance area and further options will appear (as shown below).
Click on “Performance Review Sign Off – Step 1”

LINKS

- Personal information
- Profile
- Employment
- Payroll
- ESS questionnaire forms
- Holiday
- Sickness
- Other Absence
- Absence History (all)
- Maternity
- Paternity
- Shared Parental
- Adoption
- TOIL
- Annual Performance Review**
- Learning & Development

☰ ☰

- Performance Review Sign Off - Step 1**
- Performance Review Sign Off - Step 2
- Performance Review Sign Off - Step 3
- View Completed Sign Off Forms
- View current/ add new employee objectives

You will now see the page below. Please complete the fields as follows:

- Review type:** Select the “Annual” option from the list (this should be the only option on the list)
- Review due date*:** Select the date the review was carried out
- Review period start*:** Again, select the date the review was carried out
- Position level:** Select the employees’ job title from the list (this should only show the position you have management responsibility for regardless of the number of positions the employee holds)

*Please enter 01/04 if you’re recording that no review has been undertaken

Performance review details New ▼ MENU ↻ 🖨

Review details

Review type *

Review due date * 📅

Period and positions the review covers

Review period start * 📅

Position level

Save

Click “Save”. You will see a notification to confirm that the changes have been saved (as shown below).

Now click on the employee’s name to return to the “Annual Performance Review” options page.

Mr James Stone

Changes have been saved.

Performance review details ↻ 🖨

Review details

Review type *

Review due date * 📅

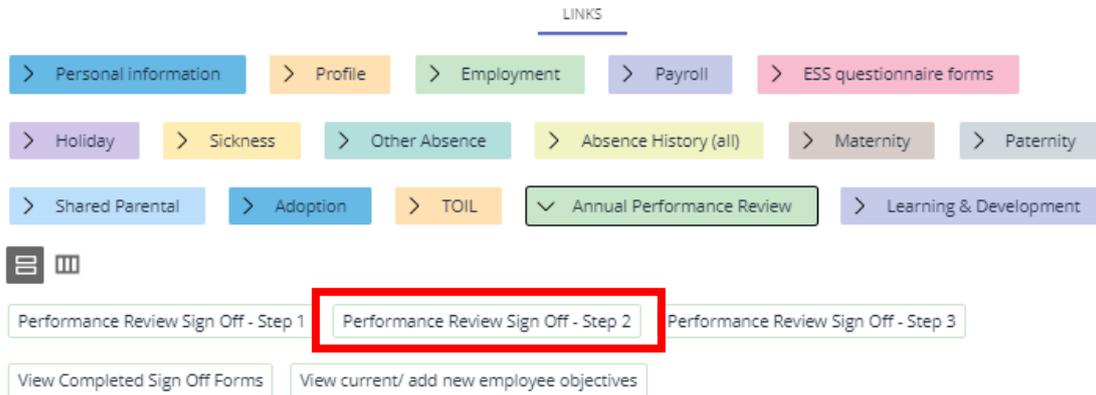
Period and positions the review covers

Review period start * 📅

Position level

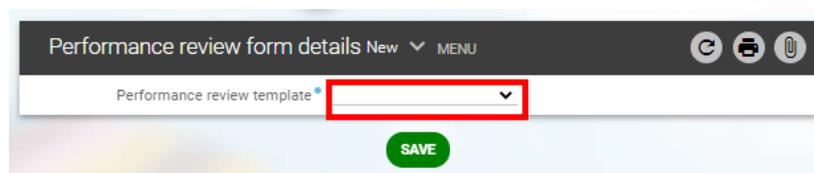
Save Delete New

Click on “Performance Review Sign Off – Step 2”



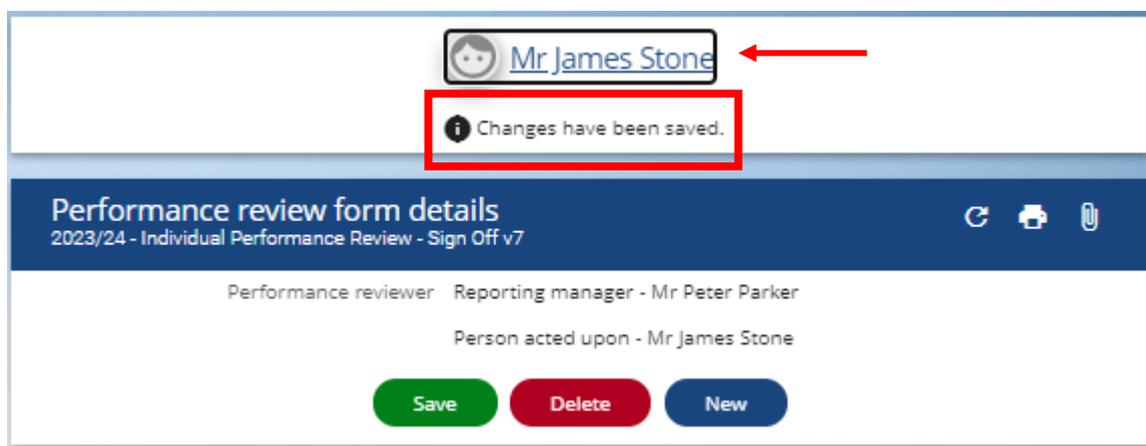
Click on the drop-down menu and select the review form (there will only be one form available in the menu).

Click “Save”.



You will see a notification to confirm that the changes have been saved (as shown below). Now click on the employee’s name to return to the “Annual Performance Review” options page.

You are now ready to complete the sign off form.



2. Complete the sign off form (Step 3)

Click on "Performance Review Sign Off – Step 3"

The screenshot shows a navigation menu titled "LINKS" with various categories. The "Annual Performance Review" category is expanded, showing three sub-links: "Performance Review Sign Off - Step 1", "Performance Review Sign Off - Step 2", and "Performance Review Sign Off - Step 3". The "Performance Review Sign Off - Step 3" link is highlighted with a red rectangular box. Other visible links include "Personal information", "Profile", "Employment", "Payroll", "ESS questionnaire forms", "Holiday", "Sickness", "Other Absence", "Absence History (all)", "Maternity", "Paternity", "Shared Parental", "Adoption", "TOIL", "Learning & Development", "View Completed Sign Off Forms", and "View current/ add new employee objectives".

The screenshot shows the "Performance review form" page for the 2023/24 Individual Performance Review - Sign Off - FINAL. The page has a dark blue header with a "MENU" icon and a "Summary" dropdown menu. The main content area contains instructional text: "The Individual Performance Review period starts on 1st April and ends on 31st January. This is an opportunity to discuss performance, career and development and set goals moving forward. It is also an opportunity to set, monitor and review objectives on a regular basis. Please only proceed if you have already met with your employee to discuss performance. If you have not met with your employee, useful guidance and templates can be found on The Source (sign in and follow the pathway: Your Employment > Your Performance) To find out more about how we use your information please see the Workforce Administration Privacy Notice on the Council's website. Please click the "start" button below to begin the sign off. You will return to this summary page at the end of the sign off. Please ensure you then click the "submit" button in order to complete the sign off." At the bottom of the page, there are two buttons: "Start" and "Print". The "Start" button is highlighted with a red rectangular box.

The first page of the sign off form will look like this.

Please read the instructional text then click the "Start" button at the bottom of the page when you are ready to complete the form.

Performance review form
Individual Performance Review - Sign Off (1 of 1)

Individual Performance Review - >

Employee Job Title •

Has this employee had a performance review meeting? •

No Yes

Name of manager who conducted the performance review •

Review date

If you have not undertaken a performance review with this employee, please tell us the reason why from the drop down list below

If you selected "Other" please give us more detail here:

To submit the sign off please complete the following steps:

1. Click the "save" button below
2. Click the "summary" button below (this should take you back to the Summary page)
3. On the summary page, click the "submit" button

Previous **Save** Summary

Complete the required fields (fields highlighted with a blue dot are mandatory).

Click the "Save" button at the bottom of the page.

Now click the "Summary" button.

Performance review form
2023/24 - Individual Performance Review - Sign Off - FINAL

Individual Performance Review - Sign Off

Summary >

The Individual Performance Review period starts on **1st April** and ends on **31st January**.

This is an opportunity to discuss performance, career and development and set goals moving forward. It is also an opportunity to set, monitor and review objectives on a regular basis.

Please only proceed if you have already met with your employee to discuss performance.

If you have not met with your employee, useful guidance and templates can be found on [The Source](#) (sign in and follow the pathway: *Your Employment > Your Performance*)

To find out more about how we use your information please see the [Workforce Administration Privacy Notice](#) on the Council's website.

Please click the "start" button below to begin the sign off.

You will return to this summary page at the end of the sign off.

Please ensure you then click the "submit" button in order to complete the sign off.

Start **Submit** Print

Click the "Submit" button at the bottom of the page.

The Individual Performance Review sign off is now complete.



3. Add/update Employee Objectives (this stage is not mandatory)

Objectives set as part of the Individual Performance Review process can be recorded and updated on iTrent but this is not mandatory. Should you decide to record objectives on iTrent they will only be visible by the reporting manager and the employee (via Employee Self Service).

Click on the employee's name to take you back to the dashboard view below.

Clicking the "Annual Performance Review" option will open the Performance area and further options will appear (as shown below).

The screenshot shows a dashboard with a 'LINKS' section containing various navigation buttons: Personal information, Profile, Employment, Payroll, ESS questionnaire forms, Holiday, Sickness, Other Absence, Absence History (all), Maternity, Paternity, Shared Parental, Adoption, TOIL, Annual Performance Review (highlighted with a red box), and Learning & Development. Below this are three buttons for 'Performance Review Sign Off - Step 1', 'Performance Review Sign Off - Step 2', and 'Performance Review Sign Off - Step 3'. At the bottom, there are two buttons: 'View Completed Sign Off Forms' and 'View current/ add new employee objectives' (highlighted with a red box).

Click on "Add new objective"

The screenshot shows the 'Objective summary' page for the date 21/04/2023. It includes a 'MENU' icon, a refresh icon, a print icon, and a download icon. Below the header, there is a 'Position' dropdown menu set to '<All>'. At the bottom, there is a button labeled 'Objectives - Add new objective' which is highlighted with a red box.



You will now see the page below.
Click on the box next to "Personal Objective"

Objective details New 🔄 🖨️ 📎

Personal objective

Objective title*

Type

Attachment date* 14/04/2023 📅

Description

Target start date 📅

Target completion date 📅

Start date 📅

Completion date 📅

Priority ▼

Position <All> ▼

Save



Objective details New

Personal objective

Objective title *

Type *

Attachment date *

Description

Target start date

Target completion date

Start date

Completion date

Priority

Objective rating method

Objective rating

Position

Complete the required fields (fields highlighted with a blue dot are mandatory).

Objective Title: Give the objective a clear description.

Type: click to highlight the Performance Review option.

Attachment date: auto generated.

Description/Additional Information: free text box to add further detail.

Target start/completion date

Start/Completion dates: enter actual start/completion dates.

Priority: High, Medium and low options available.

Objective rating method: This is a default option.

Objective rating: Completed, In Progress, No longer relevant/Withdrawn and Not started options available.

Position: for multiple post holders select the post relevant to this Individual Performance Review.

When complete click "Save".

The saved objective will now show on the Objective Summary page (as shown below).

Objectives can be reviewed and updated following the same steps.

Objective summary (as of 21/04/2023)

Position

Objectives - [Add new objective](#)

Objective title - Attend Excel training	Type	Start date	Completion date	Objective rating	Objective linked to
	Performance Review Objective			In Progress	