



End of Year Performance Review Manager Guide

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Introduction

Overview

The annual performance review meeting should take place with you and your colleague, between August and October. It consists of an end of year performance review, objective setting, and continuous professional development plans.

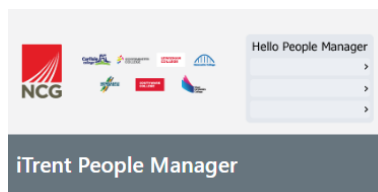
During this meeting, you should discuss your colleague's performance against their set objectives and give them a rating. Once the meeting has taken place, you will need to complete your colleagues review form and input their rating into iTrent People Manager.

This guide will go through the steps to enable you to log into People Manager and process your employee's performance review.

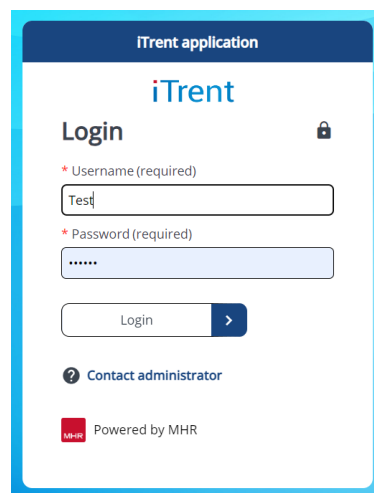
The performance management policy if required, can be found here [2021-09 NCG Performance Management Policy \(ncgrp.co.uk\)](http://ncgrp.co.uk/2021-09-NCG-Performance-Management-Policy)

How to log in

iTrent can be accessed via the NCG intranet <http://intranet.ncgrp.co.uk/SitePages/Home.aspx> and clicking the iTrent people manager icon.



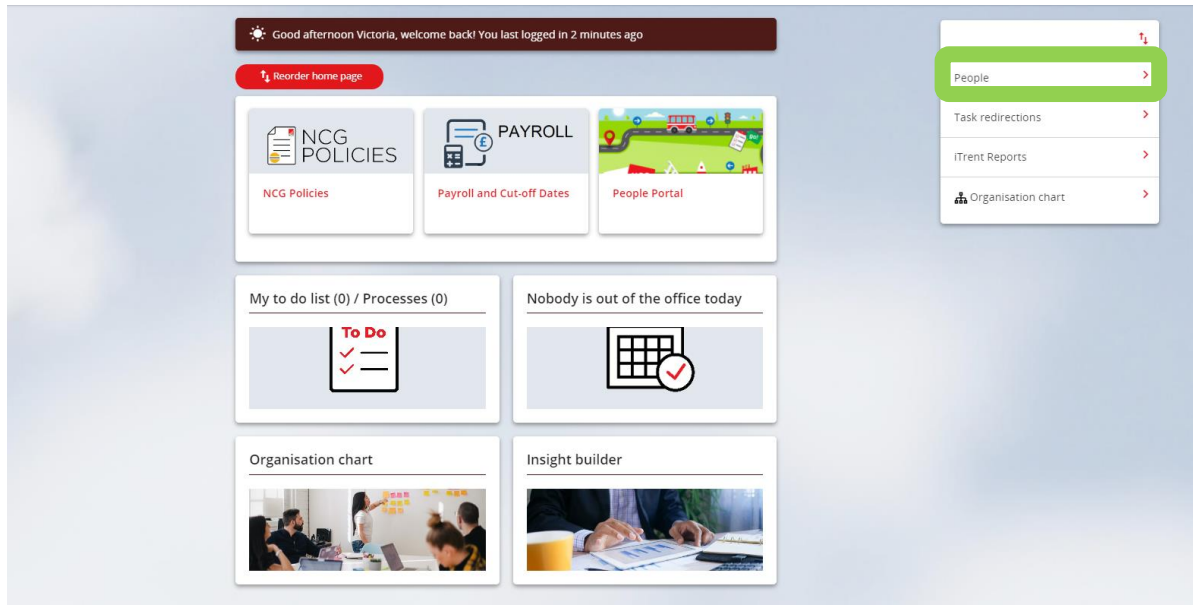
Once link has been clicked it should automatically take you to your manager dashboard. If this does not happen, please put your Username and Password into the appropriate boxes and click 'login'. Note: Your credentials are the same as logging into your work PC



Completing the Review Form

How to complete the review form in iTrent

Once you have held your annual review meeting with your colleague, log into iTrent and go to the home page. Select **People** on the home page.



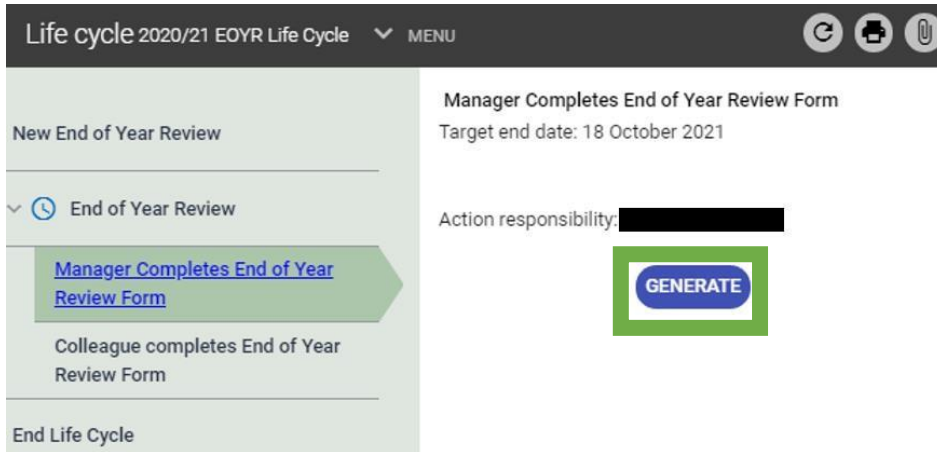
A search bar will appear on the left-hand side, in which you can find the person by their surname, then click Performance management



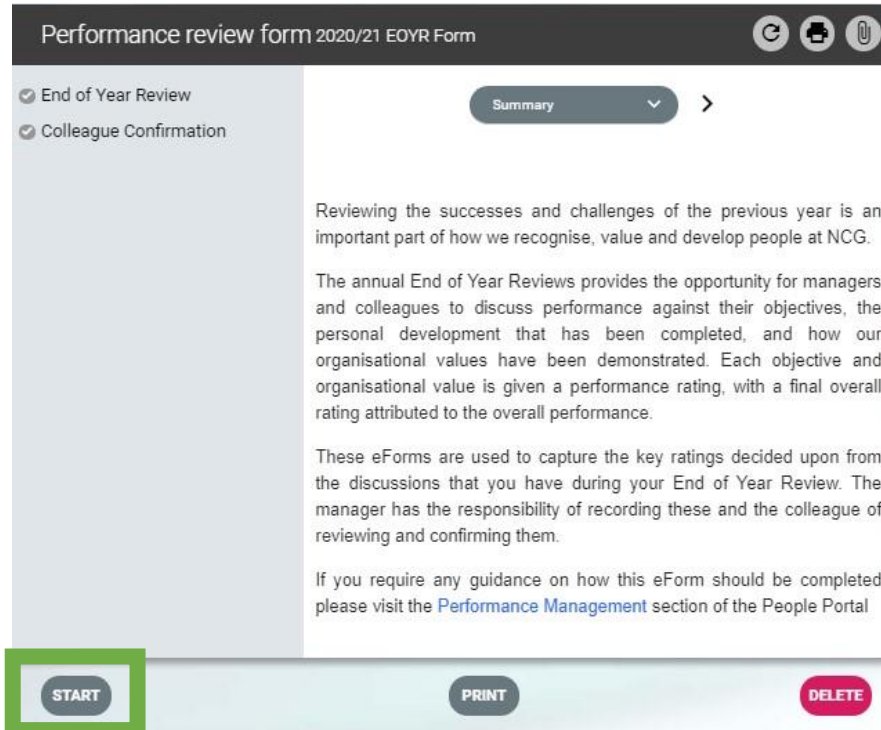
Click End of year Appraisal.






The following will appear, click on Generate.



Then click on start:



Next fill out the form. Add the date and use the appropriate option buttons, further below is a text box where you can add further information and a drop-down box to select the overall rating score.


Performance review form End of Year Review (1 of 2)   

< End of Year Review >

Colleague name

Job title

Manager Name

Date of Session 

Please select a Performance Rating below for the colleague's performance against their objectives as a whole. This will then contribute to the colleague's 'Overall Rating' alongside their performance against our Values.

Detail on the individual objectives are included below for information only. No rating of individual objectives is required on the system.

	Exceeded	Partially Achieved	Not Achieved	Achieved
Objectives Performance	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

> Objectives (0)

Press **Save** and then press **Summary**.

Please select a Performance Rating below for the colleague's performance against each of our Values. These ratings will then contribute to the colleague's 'Overall Rating' alongside their performance against their Objectives.

	Partially Achieved	Not Achieved	Exceeded	Achieved
Being both inclusive and diverse	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Trusting and respecting our communities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Taking ownership whilst working collaboratively	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Inspiring excellence and curiosity	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Discussion Summary (optional)

Please select an Overall Rating for the colleague's Performance for the year. This should be based on their performance against both their objectives and our Values

Overall Rating: Exceeded Expectations

For the Manager - Please remember to submit your completed eForm. You can do this from the Summary screen by first clicking the 'Summary' button below and once on the Summary screen clicking the 'Submit' button.

For the Colleague - Once you have reviewed the eForm please click 'Next' to complete your confirmation.

PREVIOUS **SAVE** **SUMMARY** NEXT

Finally press Submit.

Note: It's essential to press submit as the appraisal will show as an outstanding action for the manager to complete on the weekly appraisal report.

Performance review form 2020/21 EOYR Form

End of Year Review
 Colleague Confirmation

Summary >

Reviewing the successes and challenges of the previous year is an important part of how we recognise, value and develop people at NCG.

The annual End of Year Reviews provides the opportunity for managers and colleagues to discuss performance against their objectives, the personal development that has been completed, and how our organisational values have been demonstrated. Each objective and organisational value is given a performance rating, with a final overall rating attributed to the overall performance.

These eForms are used to capture the key ratings decided upon from the discussions that you have during your End of Year Review. The manager has the responsibility of recording these and the colleague of reviewing and confirming them.

If you require any guidance on how this eForm should be completed please visit the [Performance Management](#) section of the People Portal

START **SUBMIT** PRINT DELETE

The End of year Review will now have a green tick to show that your section has been completed.

An email will go to the Employee to complete their section in self-service. Once they have completed this, you will receive an email stating this.

Colleague confirmation will now show with a green tick and this will show that the performance review is fully complete.

