



End of Year Performance Review Employees Guide

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Introduction

Overview

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

During this meeting, your manager will discuss your performance against your set objectives and give you a rating. Once your manager has input your rating into iTrent you will need to log into the iTrent Employee Self Service (ESS) to access your end of year review form and confirm the rating.

This guide will go through the steps to enable you to log into ESS and confirm your rating.

How to log in

Once your manager has inputted your performance rating into iTrent, you will receive an email to ask you to complete your Appraisal in Self Service. You should then log into iTrent Employee Self Service (ESS) iTrent can be accessed via the NCG intranet <http://intranet.ncgrp.co.uk/SitePages/Home.aspx> and clicking the iTrent Self Service icon.



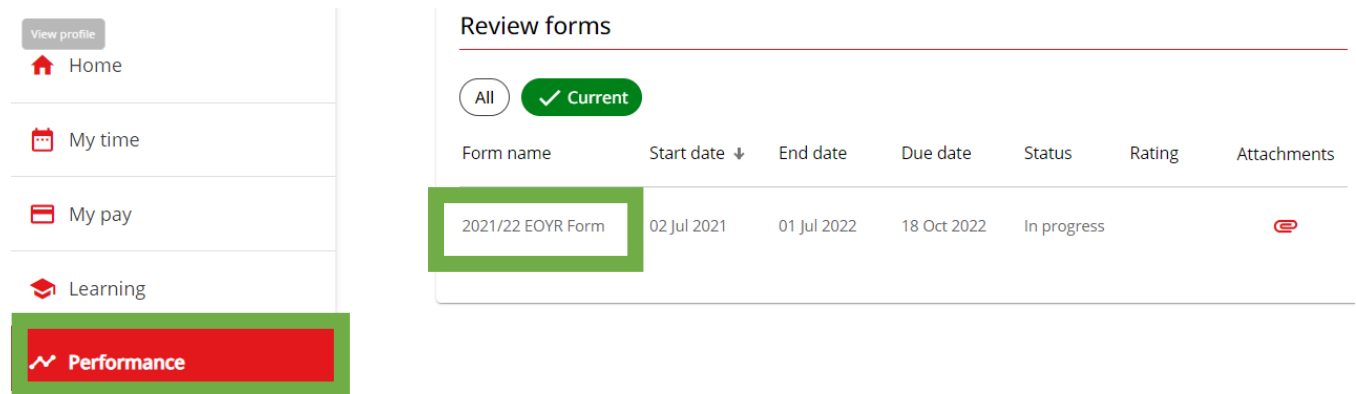
Once link has been clicked it should automatically take you to your ESS dashboard. If this does not happen, please put your Username and Password into the appropriate boxes and click 'login'. Note: Your credentials are the same as logging into your work PC

The image shows a screenshot of the iTrent application login form. The form is titled 'iTrent application' at the top. Below the title, the iTrent logo is displayed. The main heading is 'Login', followed by a lock icon. There are two input fields: the first is labeled '* Username (required)' and contains the text 'Test'; the second is labeled '* Password (required)' and contains a series of dots. Below these fields is a 'Login' button with a right-pointing arrow. At the bottom of the form, there is a link that says '? Contact administrator' and a footer that says 'Powered by MHR' with a small MHR logo.

Completing the Review Form

How to complete your Appraisal in iTrent Self-Service

Once you have logged into ESS click on Performance. Click on the current review form, as shown below;

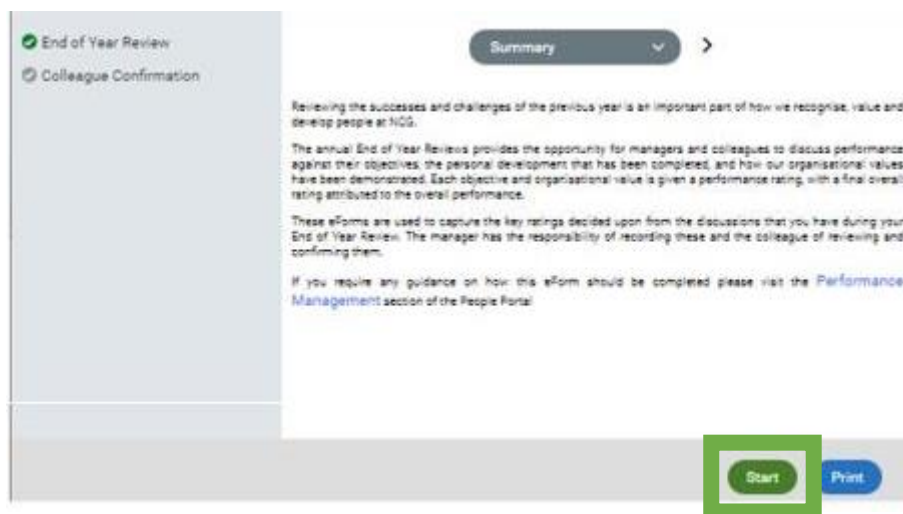


The screenshot shows the iTrent Self-Service interface. On the left is a navigation menu with options: Home, My time, My pay, Learning, and Performance (highlighted in red). The main content area is titled 'Review forms' and features a table with columns: Form name, Start date, End date, Due date, Status, Rating, and Attachments. The 'Current' filter is selected. The table contains one entry: '2021/22 EOYR Form' with a start date of 02 Jul 2021, end date of 01 Jul 2022, due date of 18 Oct 2022, and status of 'In progress'. A red link icon is visible in the Attachments column.

Form name	Start date ↓	End date	Due date	Status	Rating	Attachments
2021/22 EOYR Form	02 Jul 2021	01 Jul 2022	18 Oct 2022	In progress		

The review form will open in a separate window,

Click on Start



The screenshot shows the 'End of Year Review' form. It has a left sidebar with 'End of Year Review' (checked) and 'Colleague Confirmation'. The main content area has a 'Summary' dropdown and a right arrow. The text explains the purpose of the review and provides instructions. At the bottom, there are 'Start' and 'Print' buttons, with the 'Start' button highlighted in red.

You should review the review form to make sure you are happy that it reflects what was discussed in your annual review meeting and that it was the outcome you were expecting. If it is not what you were expecting, you should discuss this with your line manager. If the review form is reflective of the conversation and rating, click on Next

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

> Objectives (0)

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.

Tick the confirmation box

Colleague Confirmation

Please confirm that you have read and reviewed your End of Year Review.

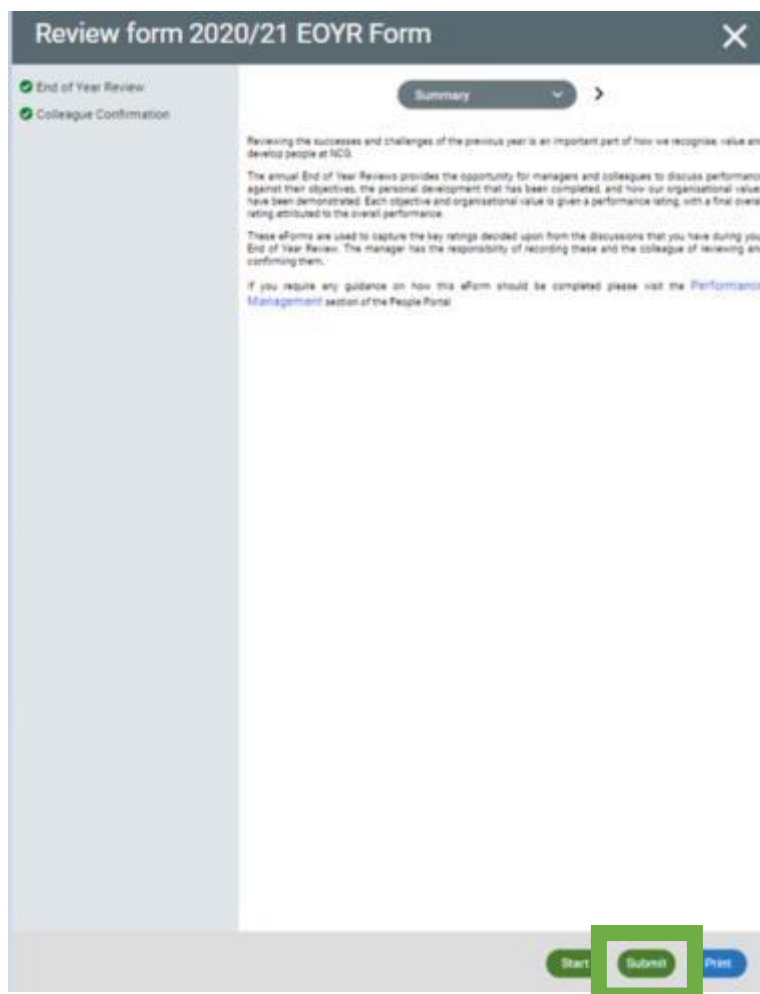
I confirm that I have read and reviewed my end of year review

Click on **Save** and then click on **Summary**



Next click on **Submit**

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



Your review will now show as fully complete, and your manager will be notified that this action has been completed.

