HVSB-R2W2-VUYU-C2QX

1. The Appraisal cycle on iTrent goes through four stages which are completed by the staff member being appraised, their line manager, and the reviewing manager (who is usually the line manager’s manager)
2. First the Appraisee logs in to iTrent Employee Self-service

Select Performance from the menu on the left.

You may want to check last years targets which are listed under the Objectives tab

Then select the Current Lifecycle listed at the top

To start the process click the generate button

1. There is information about the appraisal process here. The four stages are:
2. Appraisee. completes the pre-appraisal performance and development summary.
3. Appraisal meeting takes place, and the Appraiser writes a summary of performance and development, and sets targets for next year.
4. Appraisee, provides a final summary.
5. Reviewing manager, writes their summary, and signs the appraisal off.

This will open the Pre-appraisal meeting form for you to fill in.

Your comments will be saved automatically as you progress through the form. You may save and come back to the page at any time but once a page is submitted you cannot make any changes.

Once the form is complete, click the Summary button and click on the Submit button to progress the form on to your line manager. Please Note The submit button will not be available if any mandatory question has been left blank.

1. Line Manager

Line manager login to iTrent People Manager and select your staff on the right

Then on the left select the staff member you want to review

click the Appraisals / reviews button at the bottom of the page then select Access appraisal/review form

First read the form the appraisee filled in there is a print button at the bottom if you want to print the page for reference during your meeting

Next, please arrange an appraisal meeting with your Appraisee to discuss their comments

During or following the meeting please add your comments, complete the performance grades for each criteria and add the targets agreed during your meeting

All staff must be graded against 4 generic criteria plus 2 additional criteria, depending on their role type.

If staff are being appraised for one role, select one area to grade the additional 2 criteria against. For example, for a Learning Assistant it would be Support to Learning

If staff have more than one role being appraised on the same form, please complete all relevant sections. For example, a Curriculum Manager who also has an Associate Lecturer post would have their grades marked against the Manager role criteria plus those for Teaching role.

Target setting

In this section, you will need to enter targets and an expected completion date for staff to work towards.

You must set at least three performance targets and at least one development target for staff

Select the outcome of the appraisal

Add any further comments and date of completion.

Click to save then return to the Summary page, click to submit to return the appraisal back to your Appraisee.

Your member of staff will then receive an email prompting them to log in and view your responses.

IMPORTANT: save this as you go through, however once you have clicked Submit you will not be able to edit your responses