Overview

- The annual PDR discussion is recorded separately from your objectives in Self-Service.
- To start the process, you need to generate the review lifecycle and record the PDR discussion date.
- We recommend that you record the discussion date after the meeting takes place.
- You must submit the Review Date screen before the rest of the lifecycle form can be completed.
- After the PDR discussion, your manager can record, save and submit their comments.
- Your manager might wish to share and confirm their comments outside of iTrent before submitting.
- Once their comments are submitted, you will receive an email notification.
- At this point, you can login, view their comments and record, save and submit your own comments.
- You can save your comments and submit them at a later stage. Once submitted they cannot be amended.
- Once the reviewer and reviewee comments have been submitted, the process is complete in iTrent.

- **If your reviewer is not your manager**, they will not have access to your details via iTrent.
- You can still use iTrent to record your PDR discussion date.
- You will need to complete a "paper" copy using the [Word template](#)
- For guidance on how to upload the Word document to iTrent, please see the separate guide.

This guide covers the following actions.

- Generating your review lifecycle.
- Recording your PDR discussion date.
- Submitting your PDR discussion date.

GENERATE YOUR REVIEW LIFECYCLE

- Login to Employee Self-Service and select the PDR & Objectives menu option, as below.
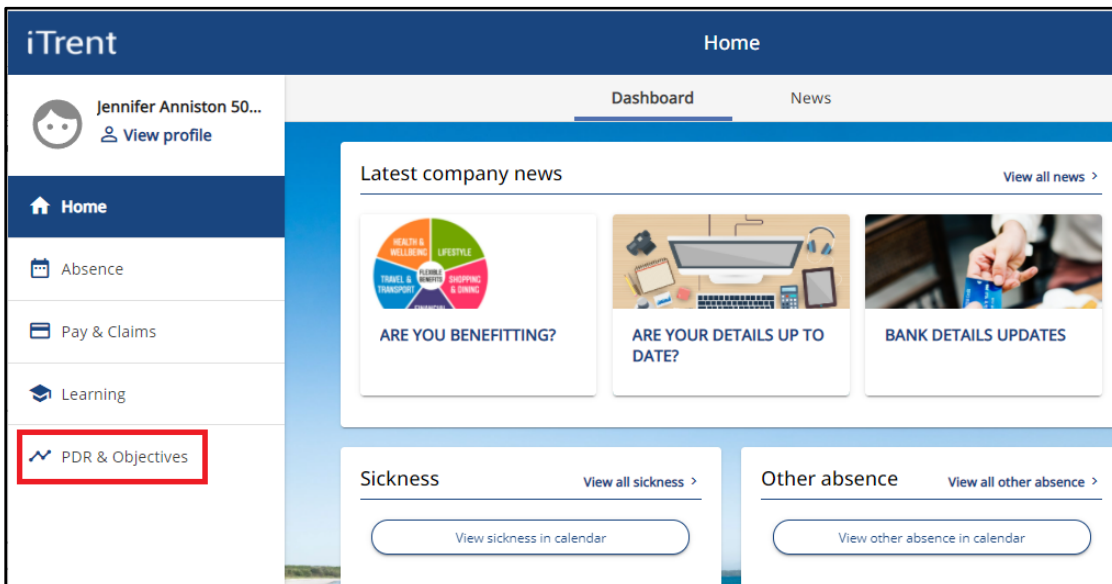
- At this point the lifecycle will show with you as the stage owner and the current stage as review date.
- Click on the review lifecycle name, as below, to open the lifecycle.

- The lifecycle screen will open, as below.
- Click the Generate button to generate the lifecycle form.

- After generating, the lifecycle form will open, as below.
- Click on the Back to Reviews link to close the screen and record the PDR discussion date at a later time.
- Click the Start button, as below, to access the review date screen and record the discussion date.

- We recommend that you record the PDR discussion date after the meeting takes place.
- Once you save and submit this screen, the discussion date cannot be amended in iTrent.
- You can save the date and submit the screen at a later stage.
- You must submit this screen before your manager can record their comments.

- If clicking Start straight after generating the lifecycle form, the review date screen will automatically display.
- If recording the date separately from generating the form, navigate to the PDR & Objectives menu, as below.
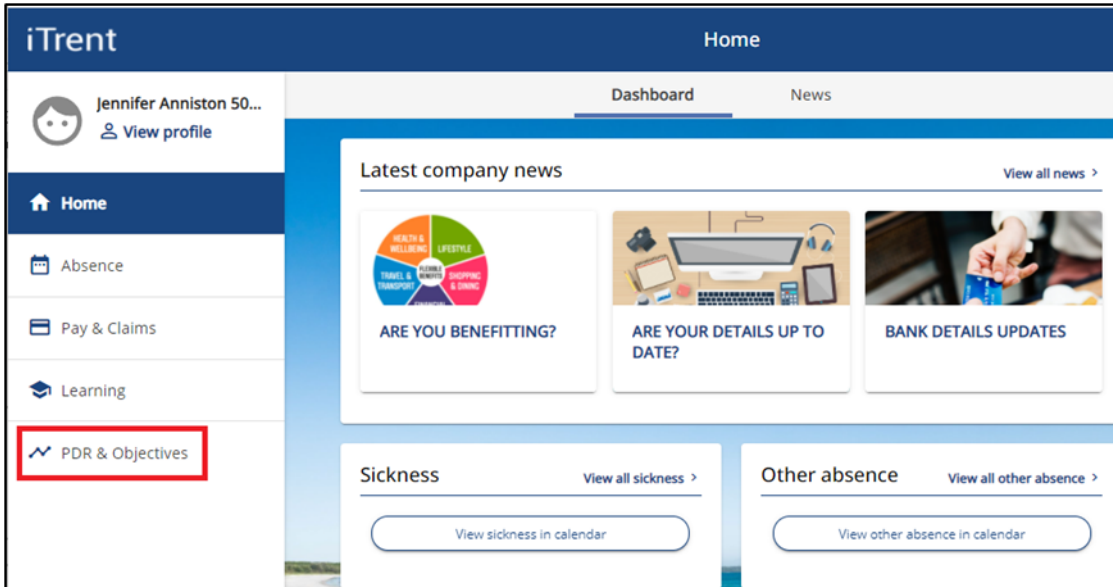
- Click on the review lifecycle name, as below, to open the lifecycle.

- The lifecycle screen will open, as below.
- Click the review date link, as below.

- The lifecycle form will open, as below.
- Click the Start button, as below, to access the review date screen and record the discussion date.

- The review date screen will open as below.

PDR Form (REVIEW DATE) (1 of 3)
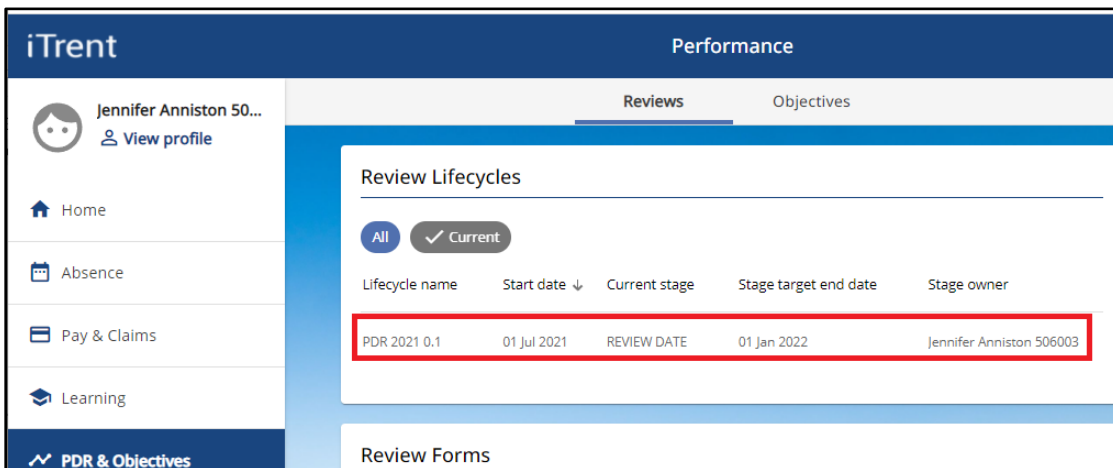
Click here to return to the performance life cycle

< REVIEW DATE ∨ >

Employee name
Jennifer Anniston 506003

Job title
Actor 280105

Reporting manager
Meryl Streep 103895

Reporting manager job title
Director 299700

Period of time in job
9 year(s) 3 month(s)

Further support and guidance can be found on our **PDR Guidance webpage here**

Review Date

Please record the date of your PDR discussion below.

Review date

(required) 📅

Once you have recorded the date, click the Summary button and then click the Submit button. This will save the discussion date and enable your manager to complete their comments.

Note for colleagues with a PDR reviewer who is not their manager: your PDR reviewer does not have access to your details in iTrent, therefore please make a note of the review date in the above field and complete your PDR comments with your reviewer using the **Word template here.** For guidance on how to upload the Word document to iTrent, **please click here.**

Previous | Save | Summary | Next

- Record the date of your PDR discussion and click the Summary button to save your changes.
- We recommend that you record the PDR discussion date after the meeting takes place.
- Once you save and submit this screen, the discussion date cannot be amended in iTrent.
- You can save the date and submit the screen at a later stage.
- You must submit this screen before your manager can record their comments.

Further support and guidance can be found on our **PDR Guidance webpage here**

Review Date

Please record the date of your PDR discussion below.

Review date

01/10/2021

(required) 📅

Once you have recorded the date, click the Summary button and then click the Submit button. This will save the discussion date and enable your manager to complete their comments.

Note for colleagues with a PDR reviewer who is not their manager: your PDR reviewer does not have access to your details in iTrent, therefore please make a note of the review date in the above field and complete your PDR comments with your reviewer using the **Word template here.** For guidance on how to upload the Word document to iTrent, **please click here.**

Previous | Save | Summary | Next

- Once you click the Summary button, the lifecycle form will display as below.
- A green tick against the review date link confirms that the date has been recorded.
- You can submit this screen now or at a later stage.
- You must submit the screen, as below, to enable your manager to record their comments.

SUBMIT YOUR PDR DISCUSSION DATE

- When you click Submit, you will be asked to confirm that you wish to submit, as below.
- Click OK to submit or Cancel to exit without submitting.

- When you submit the screen, a confirmation message displays as below.

- If you try to edit this screen after submitting it, the following message will be displayed.

- The review lifecycle will now display with your manager as stage owner and the current stage as reviewer summary.