



Professional Development on the iTrent Platform

Manager's Guidance

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Introduction

What is Professional Development?

Our employees, and their skills, knowledge, experience and talents are at the heart of our organisation, and we know that our staff are our most important and valuable asset. We could not achieve our vision and have a positive impact on our residents and customers without them.

It is therefore essential that time and space is allocated to focus on our employees and reflect on what has happened during the past year, what they have enjoyed, how they have displayed our One Council values, behaviours, what they want to do in the future, personal goals, aspirations and their professional development, as well as celebrating their achievements.

My Sefton, My Space

My Sefton, My Space is Sefton Council's Performance Development Review (PDR) process. It is a key part of the opportunities our employees have to develop, grow and thrive in their role.

The My Sefton, My Space PDR process provides employees and you, their managers, with the time and space for a more in-depth and enhanced conversation about the previous 12 months, future aspirations, performance and development requirements for the following year.

The PDR process has also been simplified and no longer includes a 6-month review. Instead, actions agreed in a My Sefton, My Space meeting should be reviewed on a regular basis in one-to-one/supervision sessions, rather than once every 6 months.

Review Period

The period for reviews runs September – August the following year, and always begins with the My Sefton, My Space review – the agreed objectives and goals are then reviewed during regular one-to-one sessions arranged with the employee.

Professional Development Schedule

Stage & Activities	Timescales
<p>1. Performance Development Review (My Sefton, My Space) Formal end of year review and My Sefton, My Place to take place between each year.</p> <ul style="list-style-type: none"> • Identify achievements for the previous year • Identify challenging tasks for the previous year • Set objectives for the coming year • Identify training needs • Discuss career aspirations/create development plan 	<p>1st September – 30th November</p>
<p>2. Training Needs Analysis Complete and submit training needs analysis to the Workforce Development Team. Completion is mandatory for all service areas.</p> <ul style="list-style-type: none"> • Review completed PDRs and identify future apprenticeship and training requirements • Complete Training Needs Analysis on/before the required deadline • Workforce Learning and Development Team creates council wide annual training plan. 	<p>To be completed the first 2 weeks in December each year.</p>
<p>3. Feedback, Supervision, Reward and Recognition Capture additional priorities and review on-going progress of the employees PDR.</p> <ul style="list-style-type: none"> • Review PDR actions • Investment in staff • Motivation and building trust • Provide on-going feedback and give praise for any achievements • Nominations for STAR and any internal service specific awards • Nominations for sub-regional, regional and national awards 	<p>Every 4 – 6 weeks.</p>

Professional Development in iTrent

Starting from the 2024 review period, we are moving the 1st and 3rd stages of the Professional Development schedule into iTrent as a phased approach.

Starting from Monday 21st October 2024, you will be required to upload completed My Sefton, My Space PDF files to the electronic review and record any future one-to-one sessions utilising the new review functionality.

The system is designed to be as simple as possible, however there are some changes in terminology which will be described in this document.

The Review Process

When you are ready to submit an employees completed My Sefton, My Space document, there are a number of steps that you need to complete in order to successfully upload the document to the Workforce & Development team.



Whilst developing the review system, we kept in mind the diverse family of employees that we have providing a broad range of services both internally and externally, we recognise that there is no singular solution that can encompass everyone. For this reason, we have developed multiple solutions for the different use cases that we have identified.

There are 3 different Reviews which are being implemented onto the iTrent platform:

- **Probation Reviews** – All new starters are required to have monthly probation review meetings for the duration that the employee is on probation.
- **My Sefton, My Space** – The My Sefton, My Space review has been uploaded to the iTrent platform allowing the Review to be completed online – employees can complete their Review questions through Employee Self Service, and this can then be reviewed by the applicable line manager. For those employees who are unable to complete the My Sefton, My Space review online, we have created an offline version where line managers can upload the completed My Sefton, My Space PDF document.
- **Time to Talk** – The formal 1:1/Social Care supervision review has also been uploaded to the iTrent platform. When completing a 1:1 or supervision review, managers can record notes to a structured series of questions. We have also created an offline version where line managers can upload completed 1:1/supervision meeting notes.

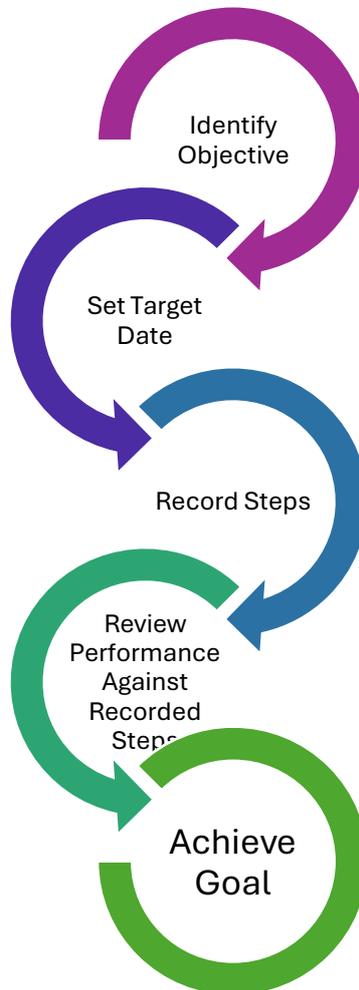
Objectives

A new feature which is being introduced within iTrent is setting and reviewing personal objectives.

As part of the Professional Development framework, setting and reviewing objectives ensure that actions are recognised, recorded and maintained for any relevant goals or achievements that have been identified during the My Sefton, My Space and continuous 1:1/supervision reviews.

Only line managers can add/update objectives, however, employees can see details at any time by logging in to Employee Self Service.

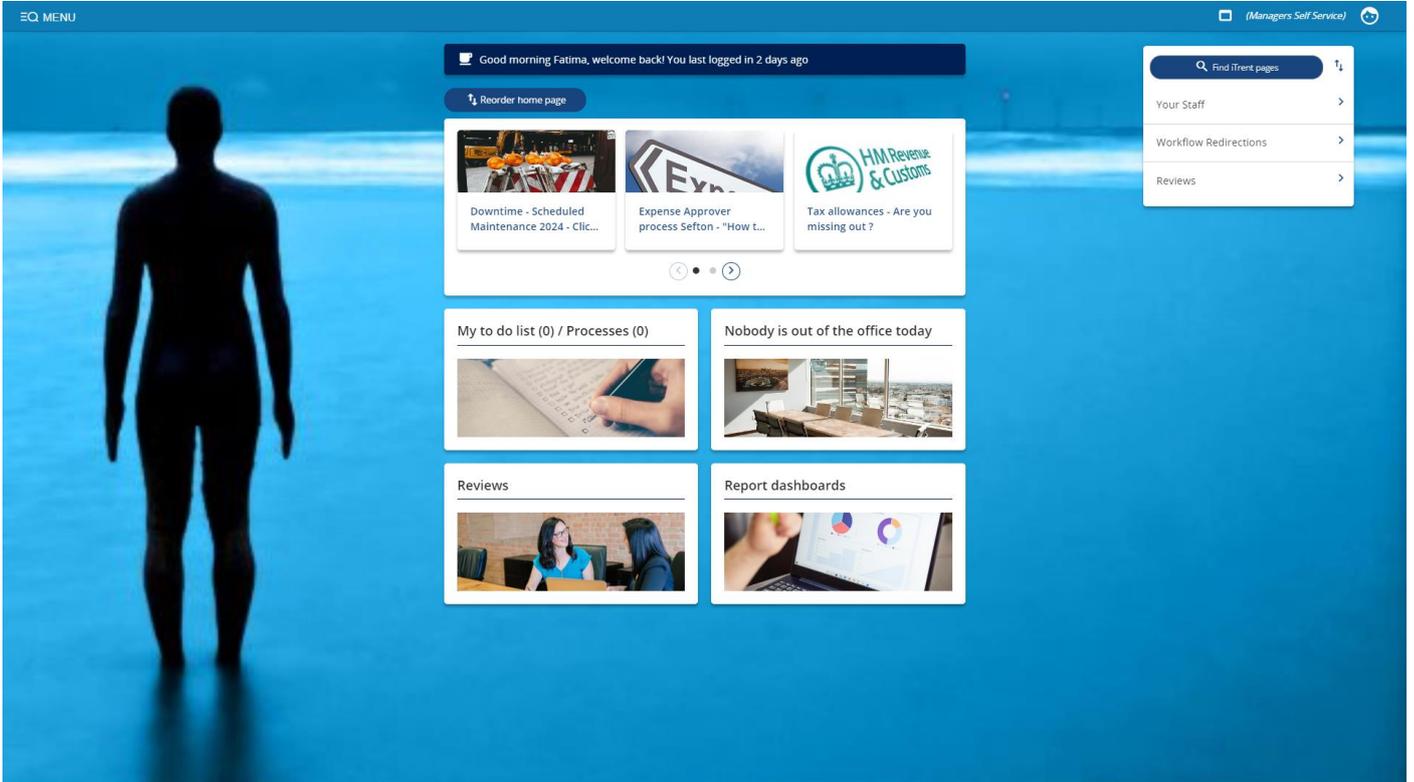
Objectives follow a process of continuous review until the target has been achieved, or in rare cases, the objective has been abandoned.



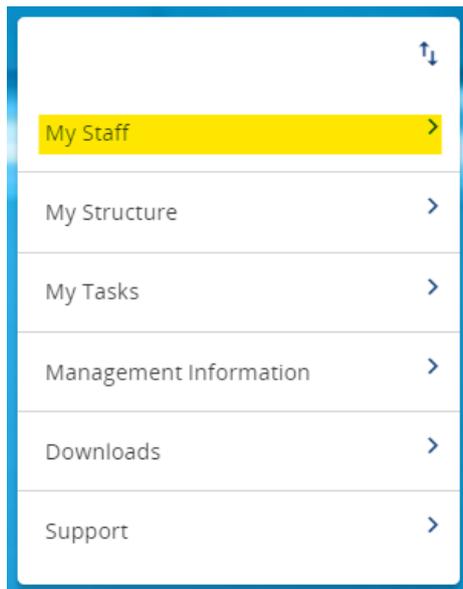
How-To

Scheduling a review

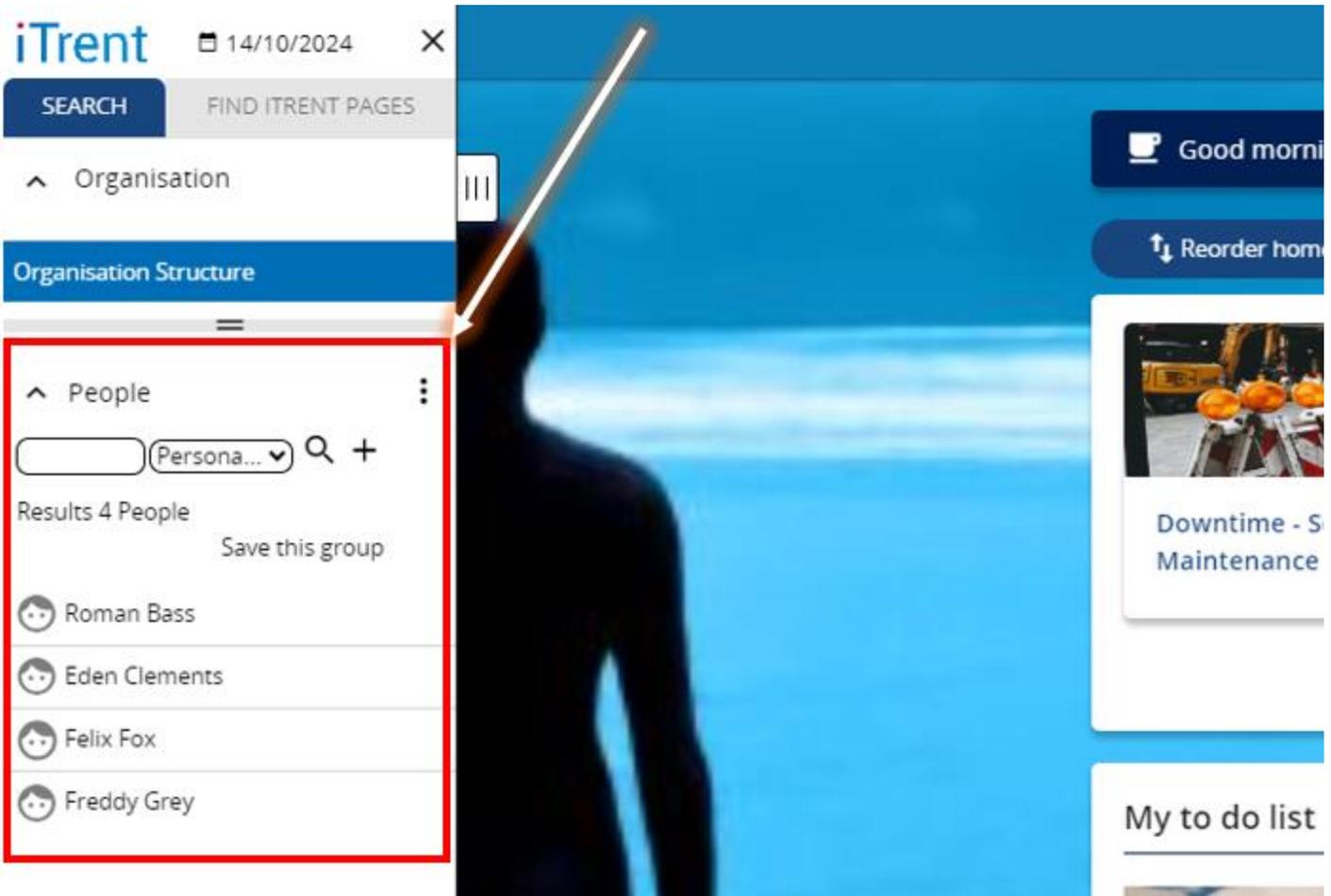
In order to schedule a review, you will need to access Manager's Self Service (MSS).



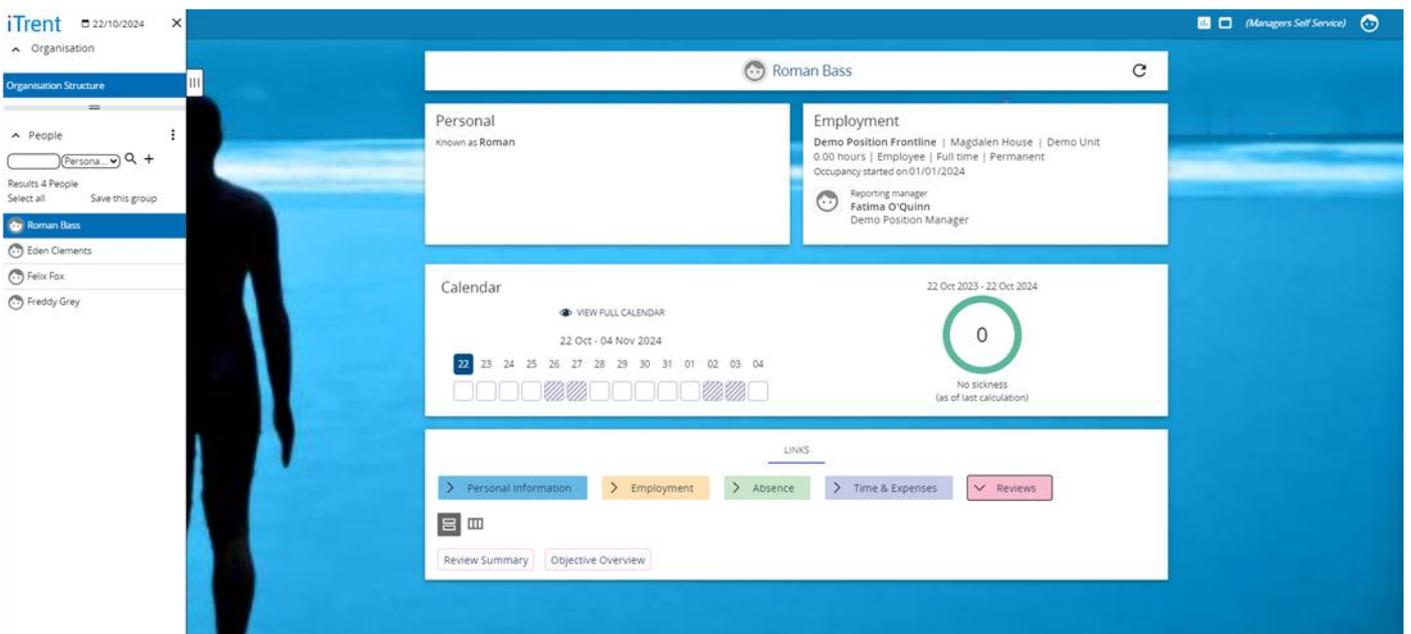
From the homepage of MSS, on the right-hand side, select the new menu option titled **My Staff**



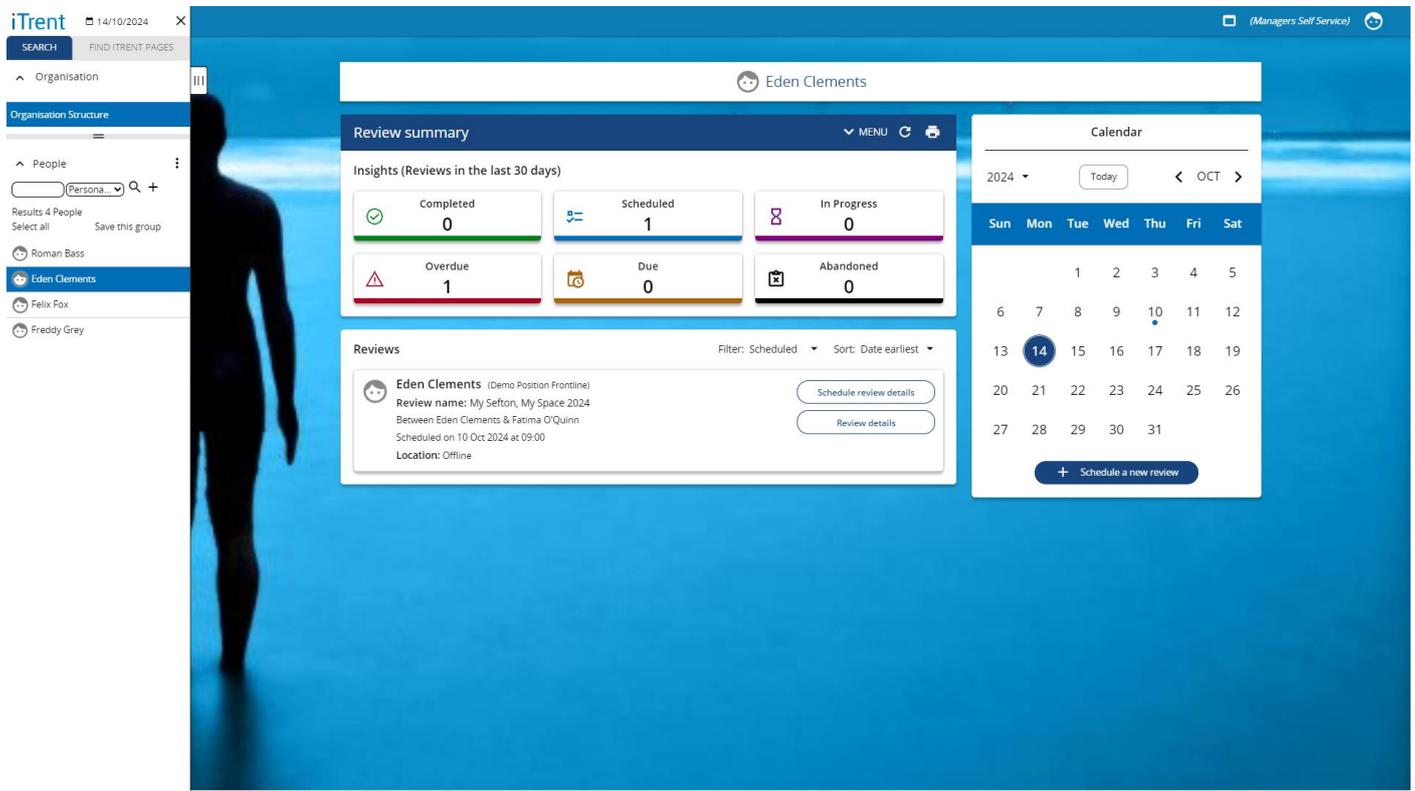
Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to review.



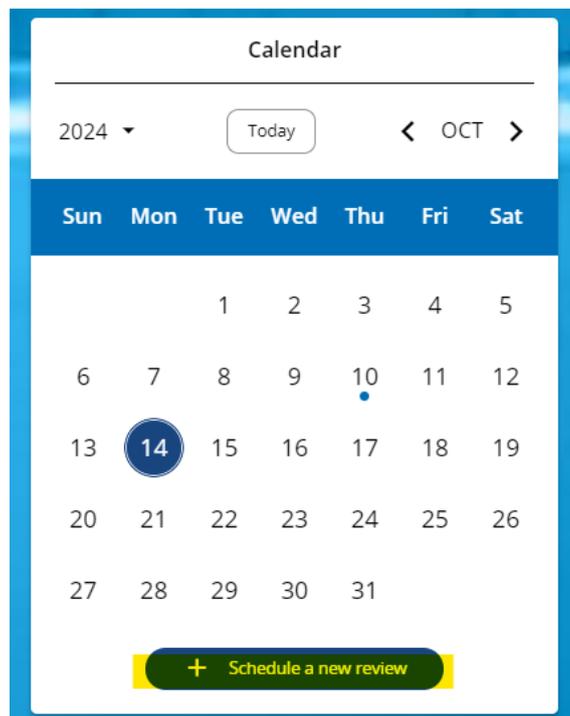
Once you have selected an employee, you will then be taken to their personal profile.



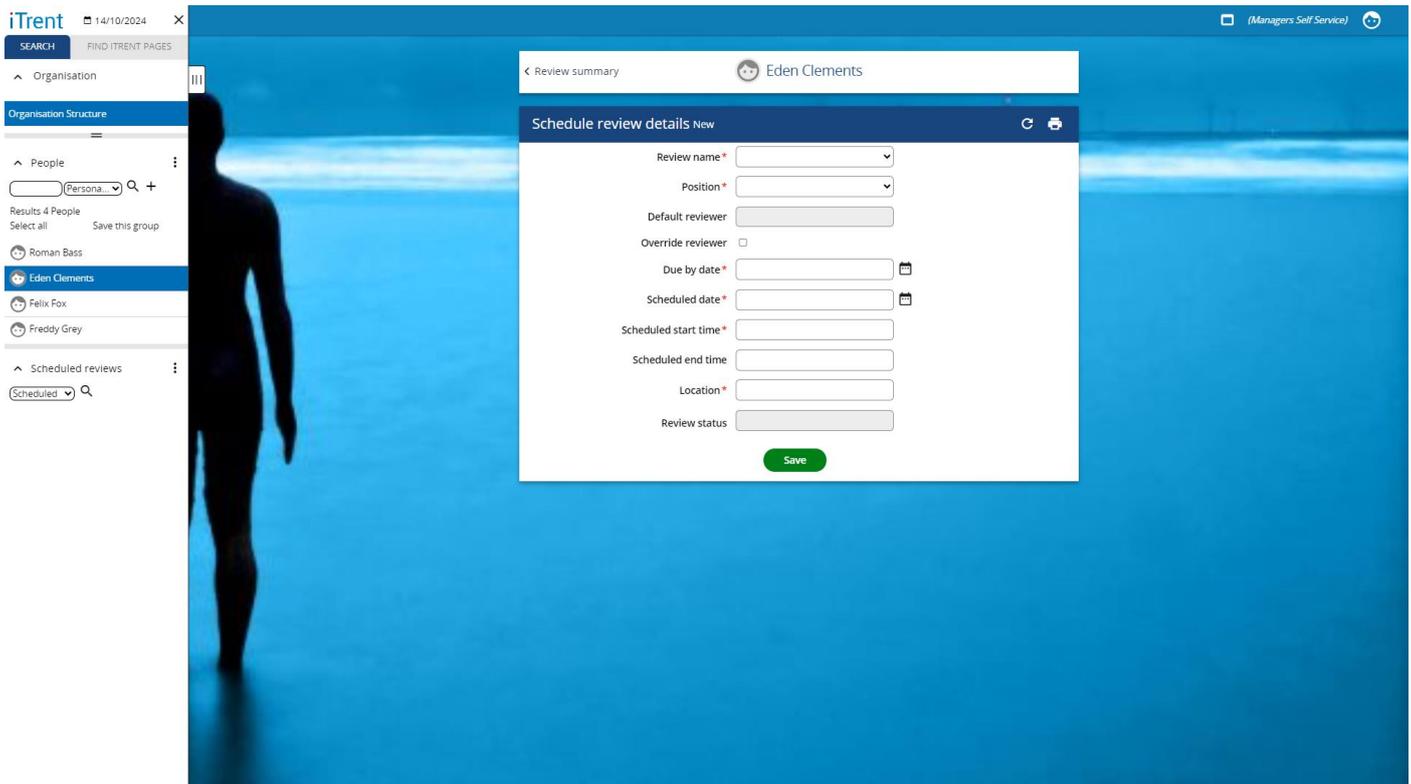
From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Review summary** – you will then be forwarded to a new window detailing the employee’s review summary.



Under the calendar on the right-hand side, click on the button titled **Schedule a new review**.



You will now be forwarded to a screen where you are required to enter a number of details in order to schedule it.



- **Review name** – select the applicable review from the drop-down menu (mandatory)
- **Position** – select the position that the review is pertinent to (mandatory)
- **Default reviewer** – this will automatically update to the employee’s line manager
- **Override reviewer** – tick this box to select another employee who will complete the review for the employee – this will change the reviewer. For example, the line manager is on annual leave.
- **Due by date** – this is the date by which the review is due. For My Sefton, My Space, this is typically 30th November of the corresponding year (mandatory)
- **Scheduled date** – this is the date that the review is scheduled on a one-to-one basis with the employee (mandatory)
- **Scheduled start time** – this is the time that the one-to-one meeting will take place on the above date (mandatory)
- **Scheduled end time** – this is the time that the one-to-one meeting will conclude on the above date (mandatory)
- **Location** – this is the location where the one-to-one meeting will be held – for online meetings, enter Microsoft Teams, however, you must schedule this separately (mandatory)
- **Review status** – this is a read-only field which will update to show the current status of the review

[← Review summary](#) Eden Clements

Schedule review details New ↻ 🖨

Review name * ▼

Position * ▼

Default reviewer

Override reviewer

Due by date * 📅

Scheduled date * 📅

Scheduled start time *

Scheduled end time

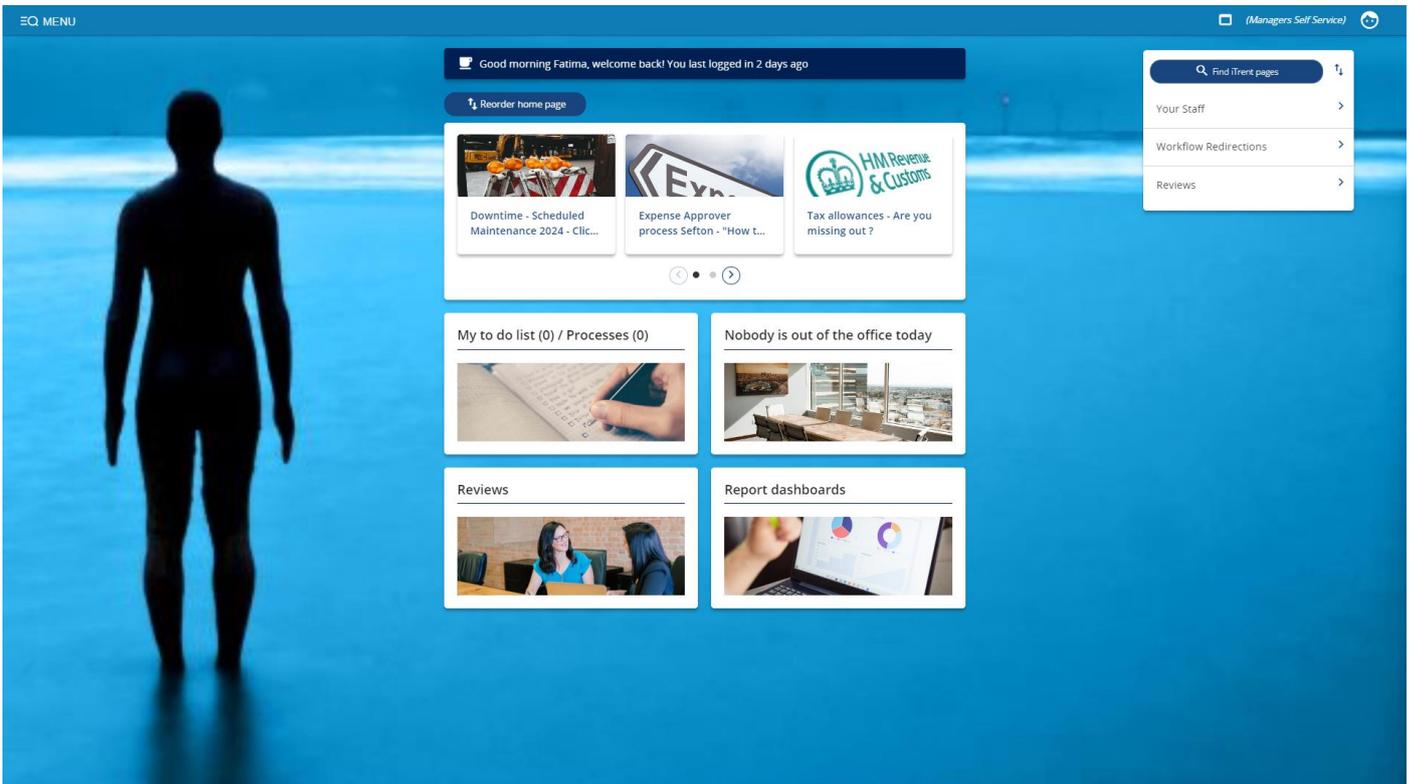
Location *

Review status

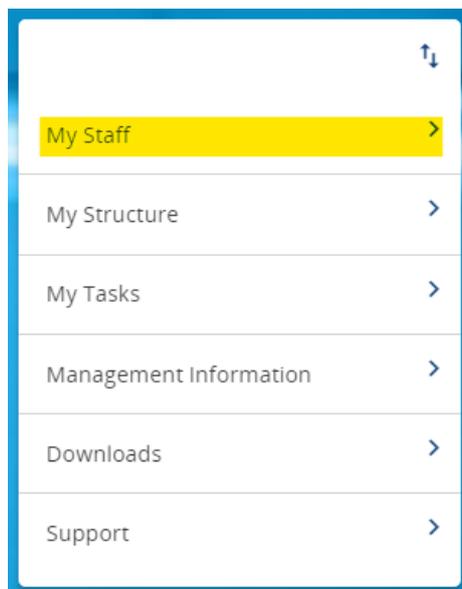
Once you click **Save**, the review will be scheduled, and a confirmation email will be sent to the employee.

Rescheduling/Amending a Review

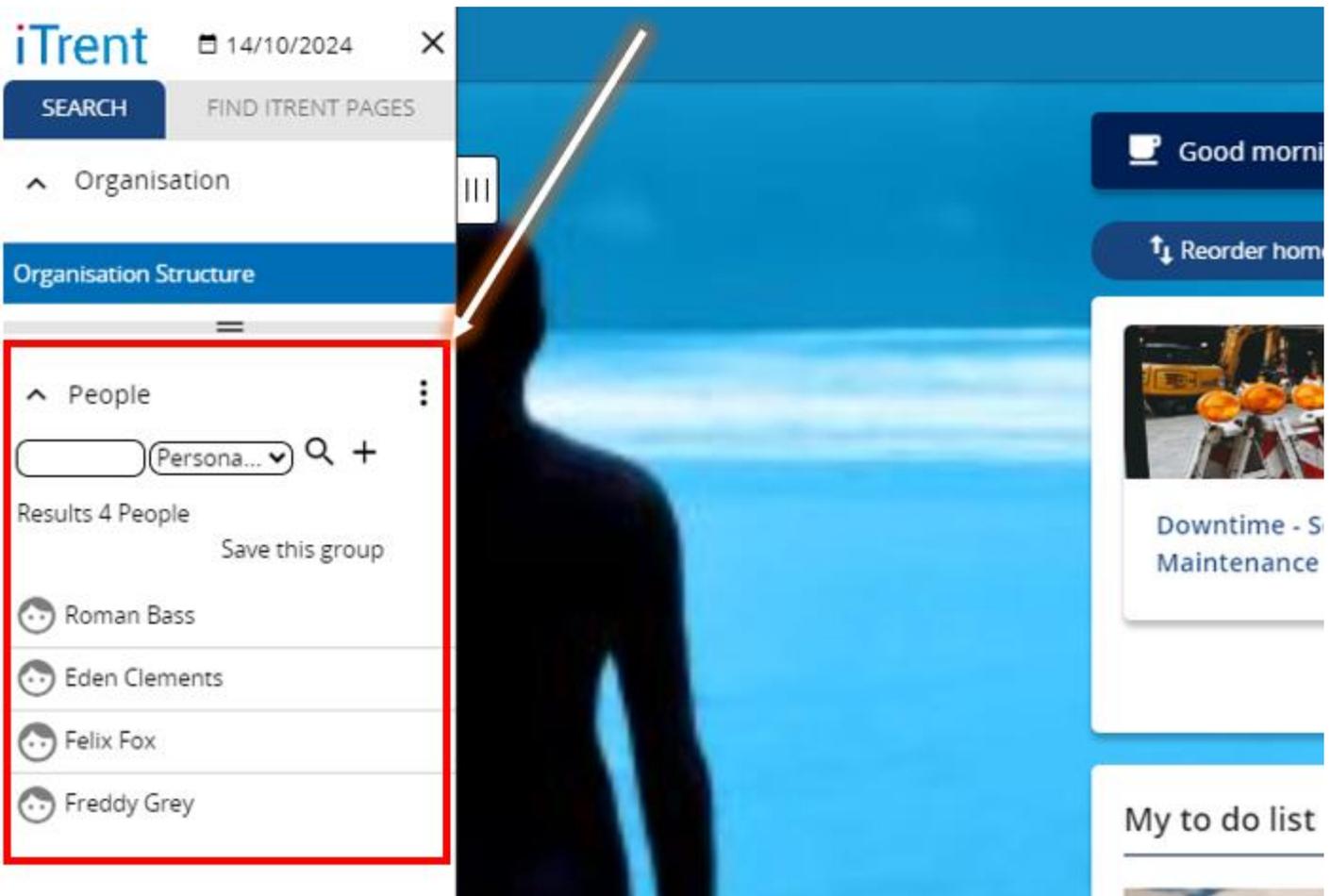
In order to reschedule or amend a review, you will need to access Manager's Self Service (MSS).



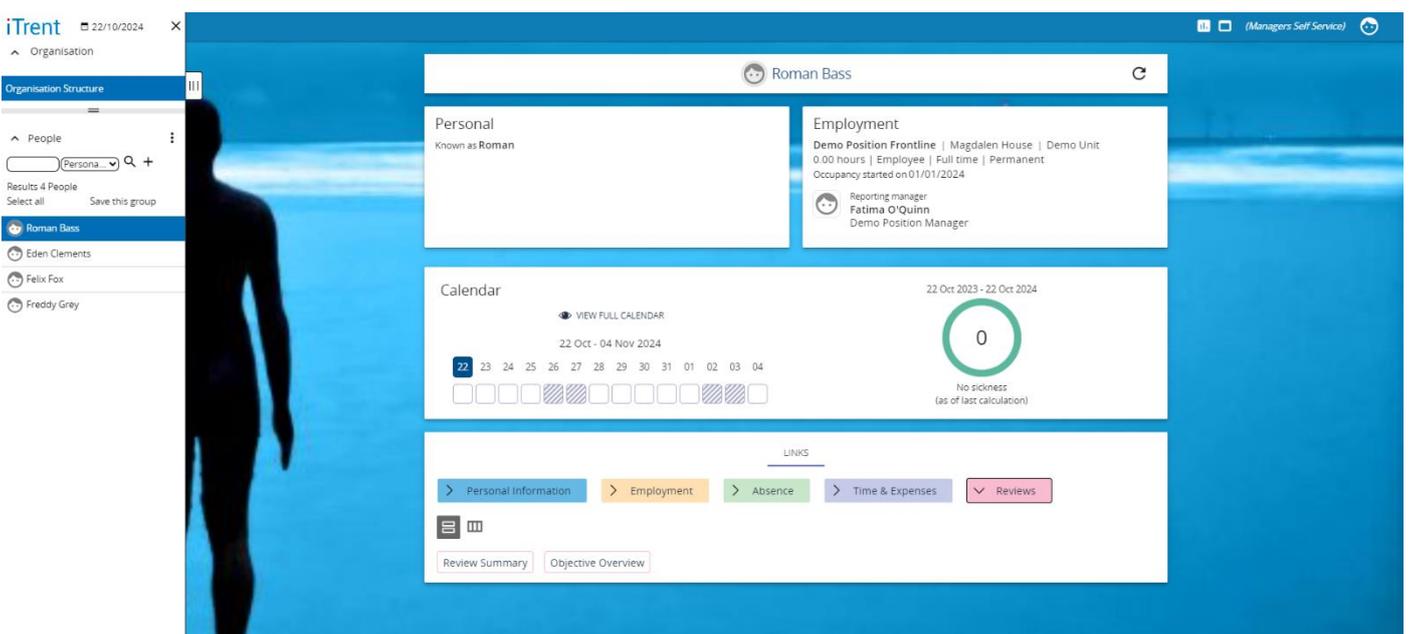
From the homepage of MSS, on the right-hand side, select the new menu option titled **My Staff**



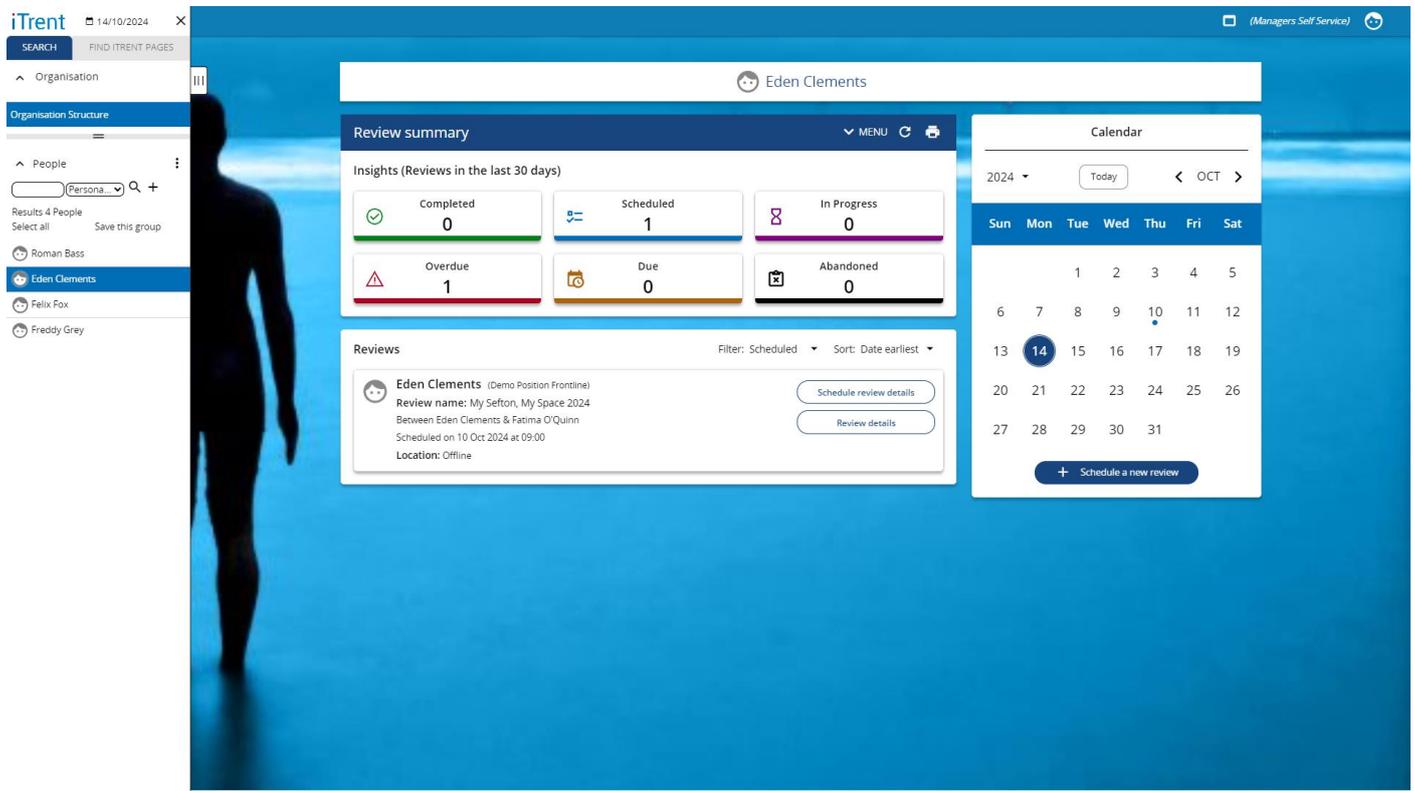
Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to review.



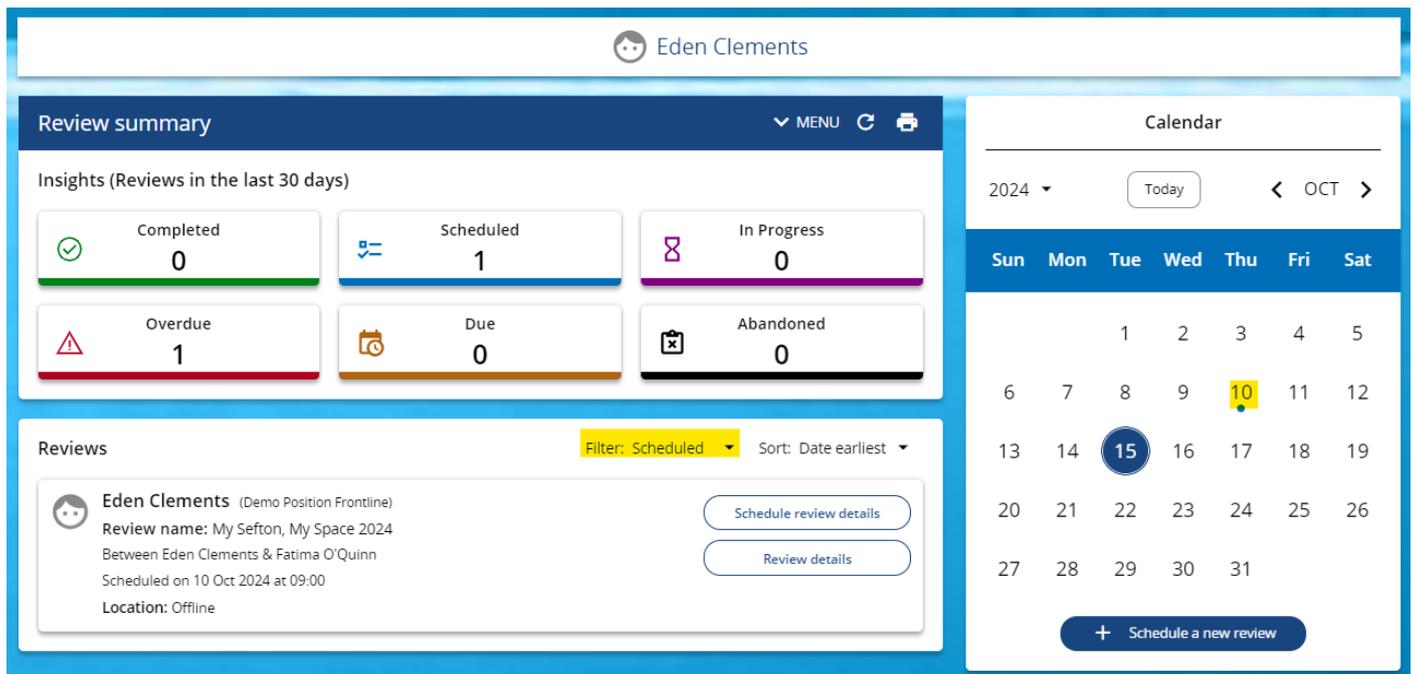
Once you have selected an employee, you will then be taken to their personal profile.



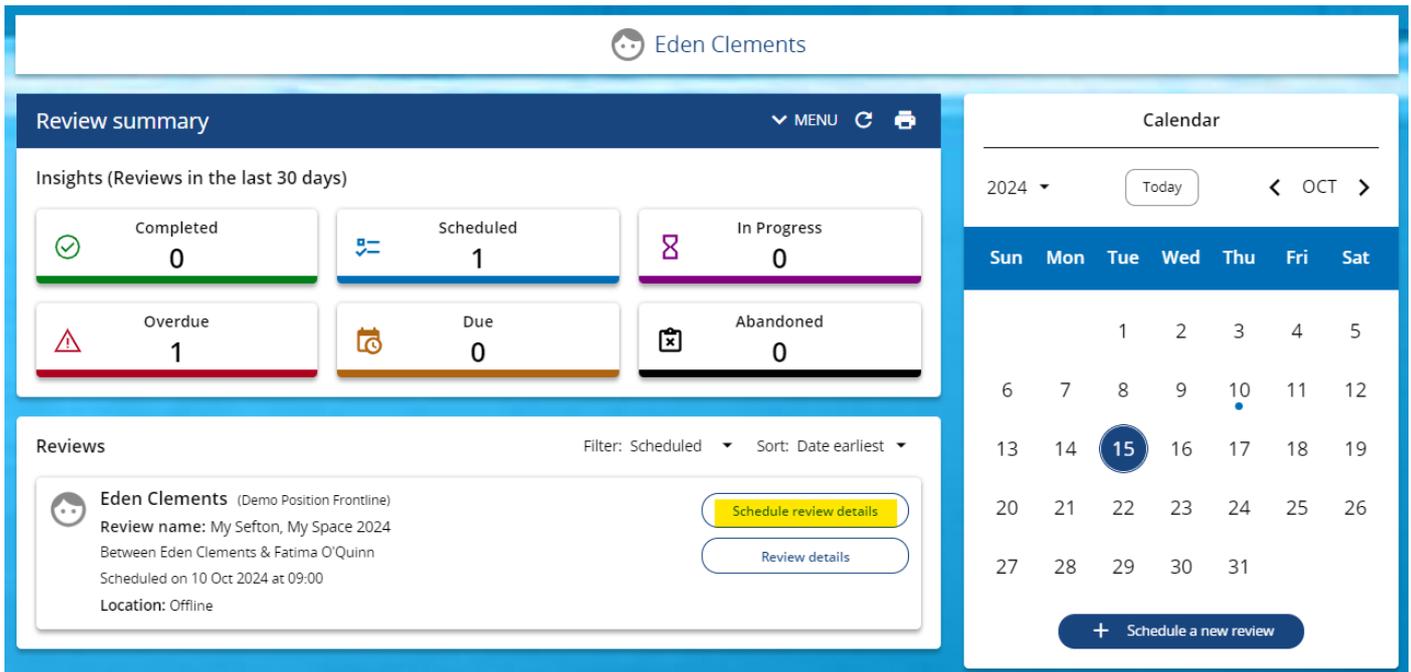
From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Review summary** – you will then be forwarded to a new window detailing the employee’s review summary.



On the **Review Summary** screen, you can see an overview of the employee’s reviews. Use the **Filter** option to view reviews which have a different status – such as “*Overdue*”, alternatively, using the calendar, on the right-hand side to view reviews planned for that date.

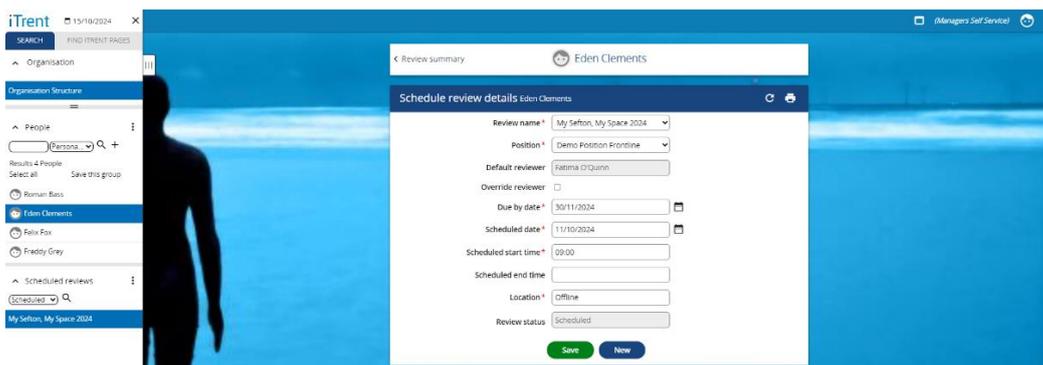


Once you have located the review, click on the **Schedule review details** button.



From the **Schedule review details** screen, you can update different options of the scheduled review, including: -

- **Review name** – select the applicable review from the drop-down menu (mandatory)
- **Position** – select the position that the review is pertinent to (mandatory)
- **Override reviewer** – tick this box to select another employee who will complete the review for the employee – this will change the reviewer. For example, the line manager is on annual leave.
- **Due by date** – this is the date by which the review is due. For My Sefton, My Space, this is typically 30th November of the corresponding year (mandatory)
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- **Location** – this is the location where the one-to-one meeting will be held – for online meetings, enter Microsoft Teams, however, you must schedule this separately (mandatory)



Update the necessary details of the review as required, then click **Save** to submit the changes. An email will automatically be dispatched to the employee advising them of the change.

[Review summary](#)  Eden Clements

Schedule review details Eden Clements

Review name * 

Position * 

Default reviewer

Override reviewer

Due by date * 

Scheduled date * 

Scheduled start time *

Scheduled end time

Location *

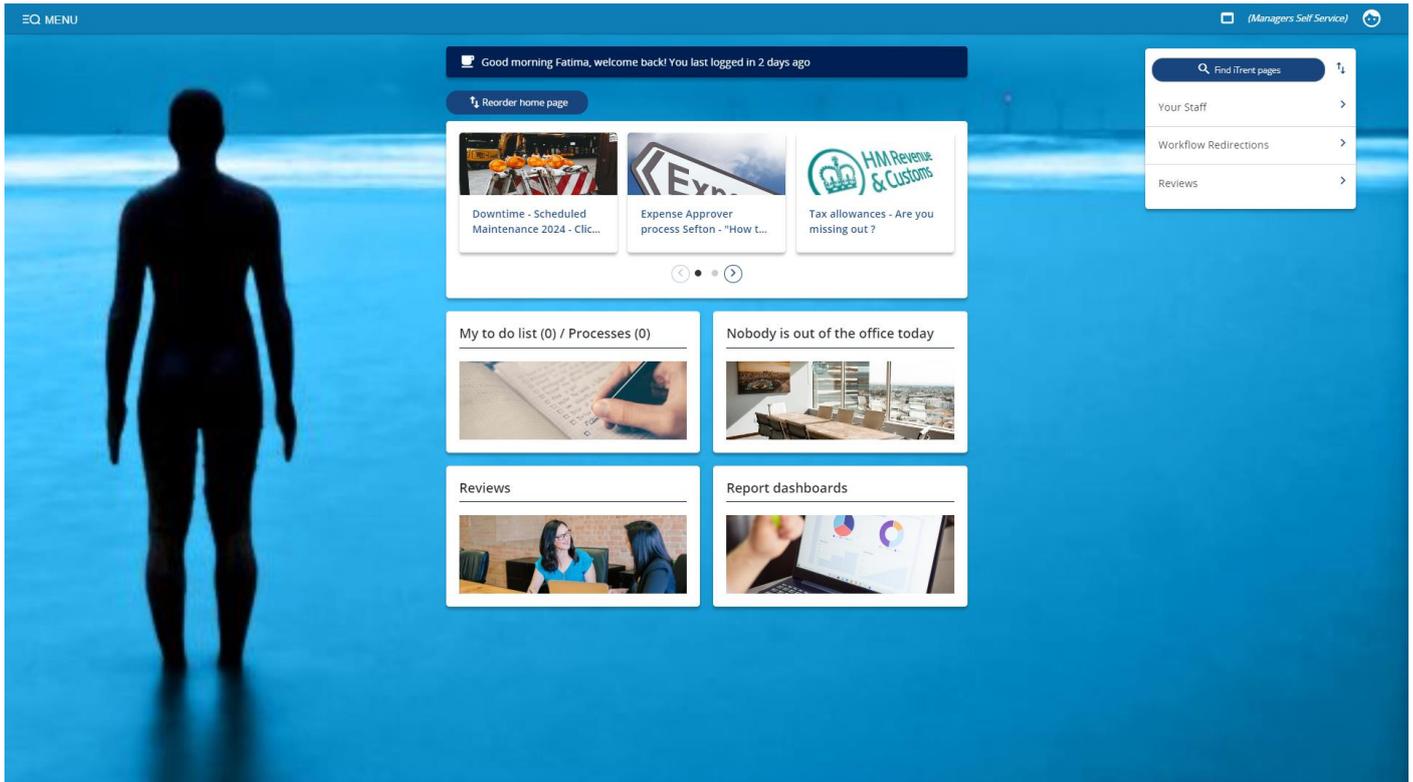
Review status

Conducting a Review

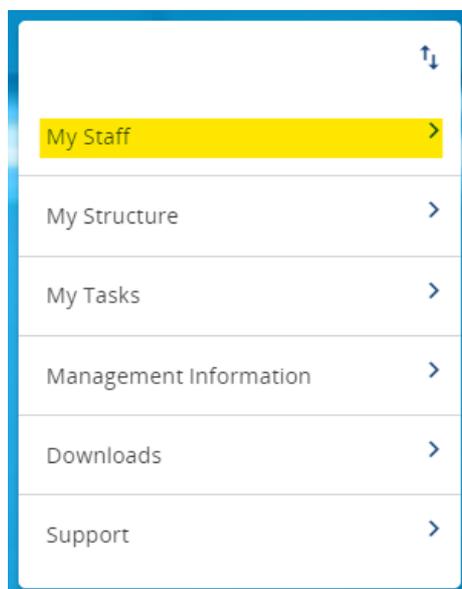
Depending on the review type, there sometimes 2 different contexts setup for that review – the Reviewee (Employee) and the Reviewer (Employee’s line manager). The relationship of Reviewee:Reviewer is sourced from the current organisational structure hosted within iTrent.

This guidance only covers completing a review from the context of the Reviewer (Employee’s line manager).

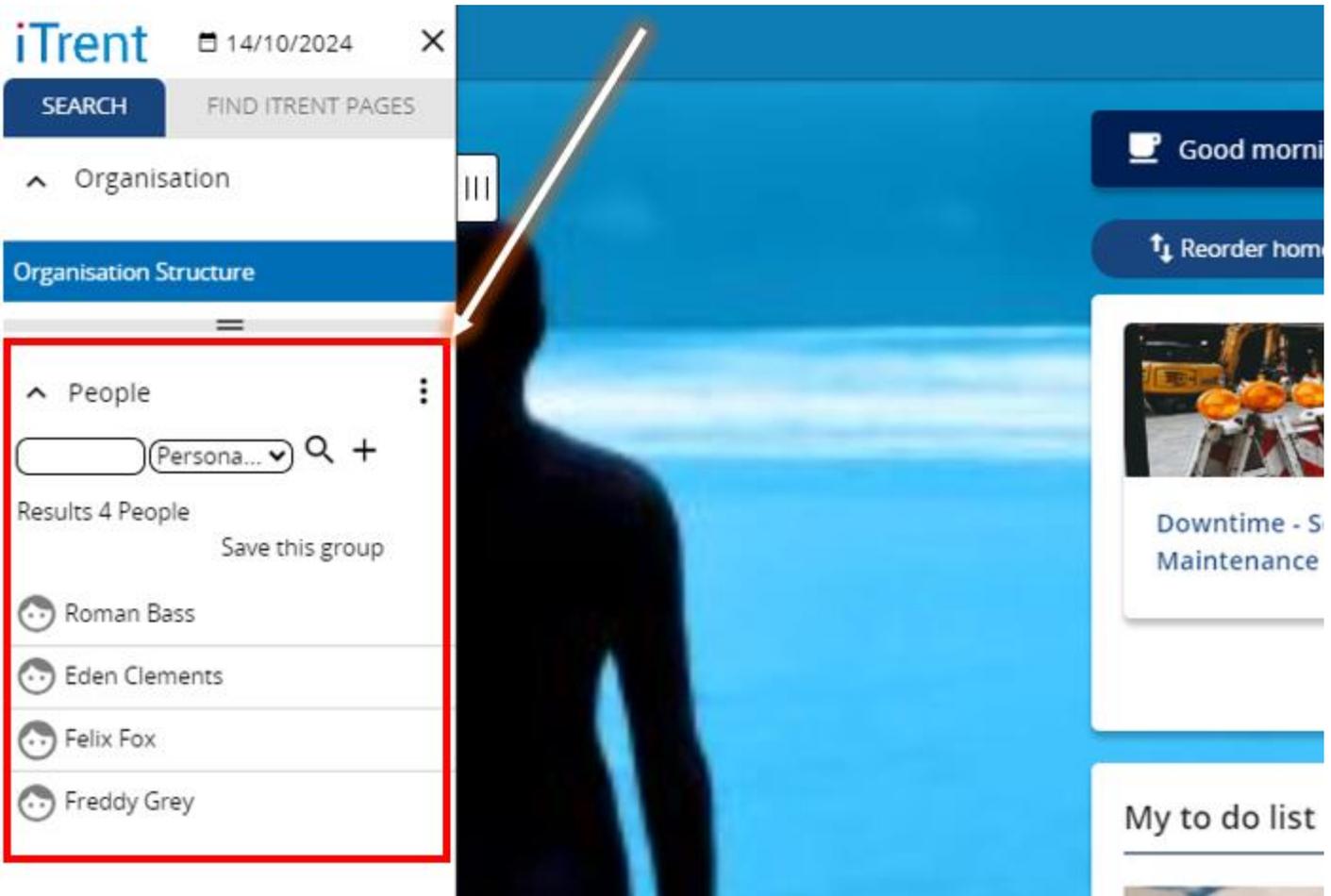
In order to conduct a review, you will need to access Manager’s Self Service (MSS).



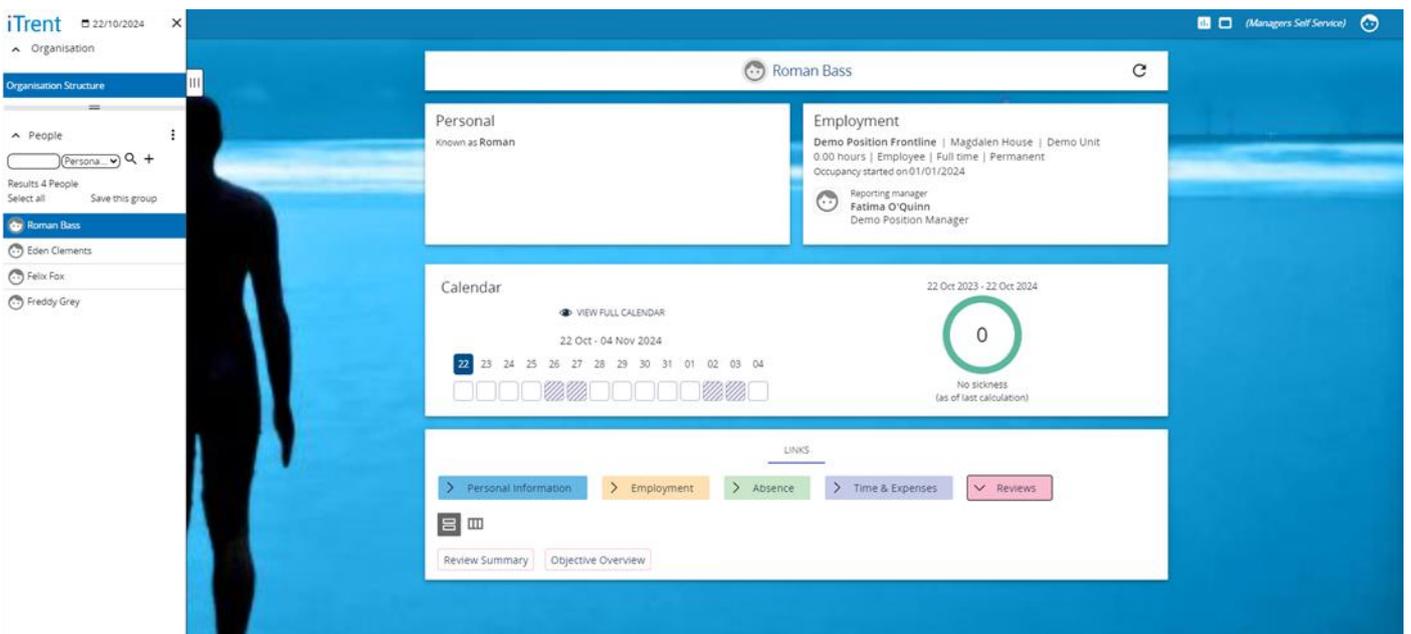
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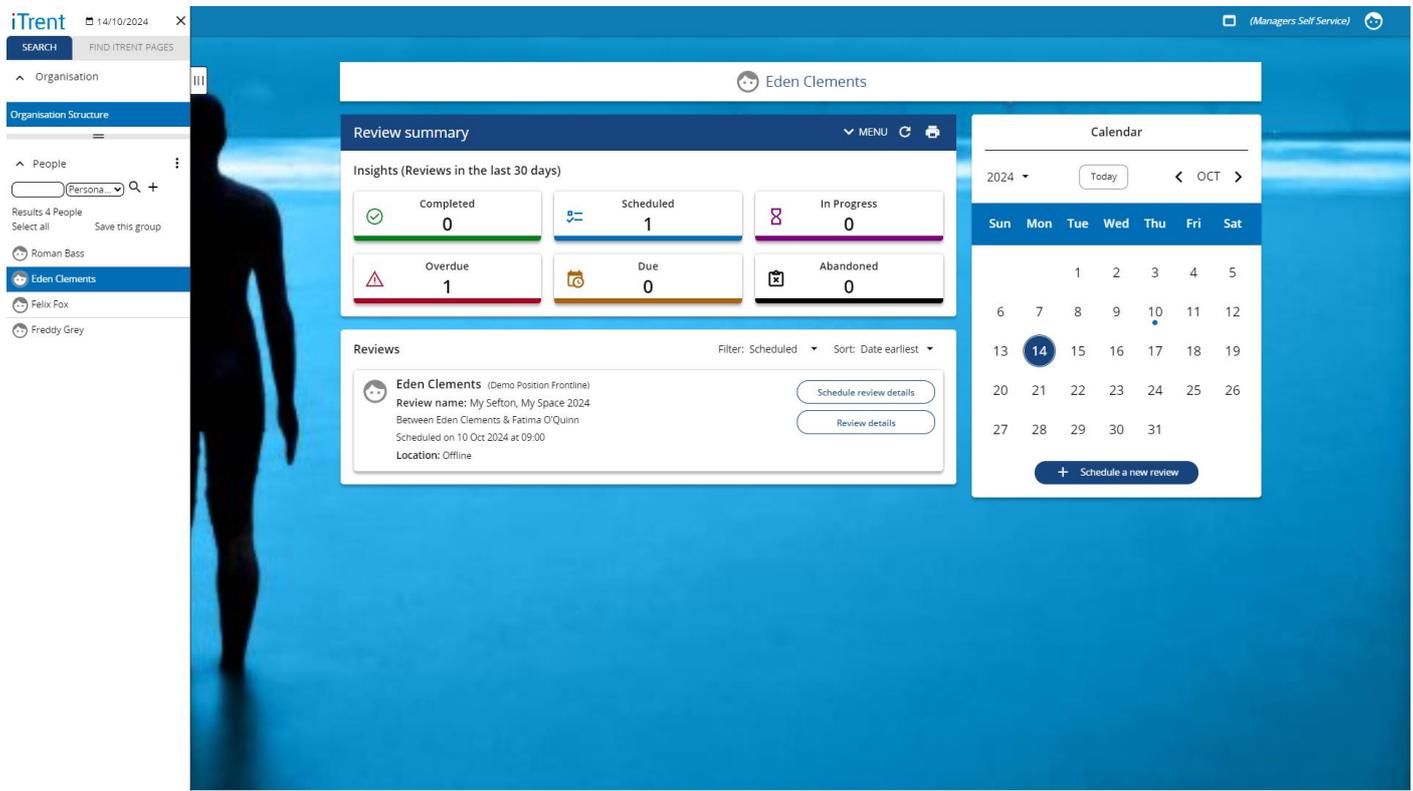
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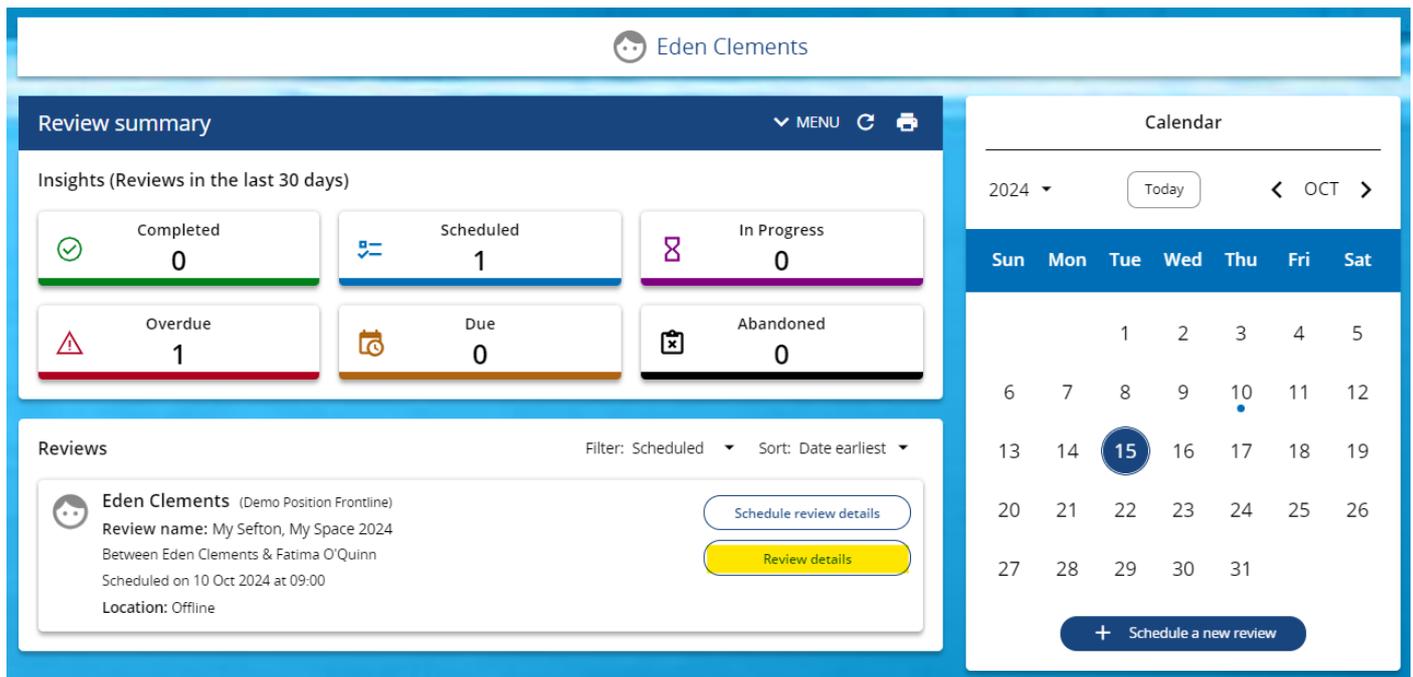
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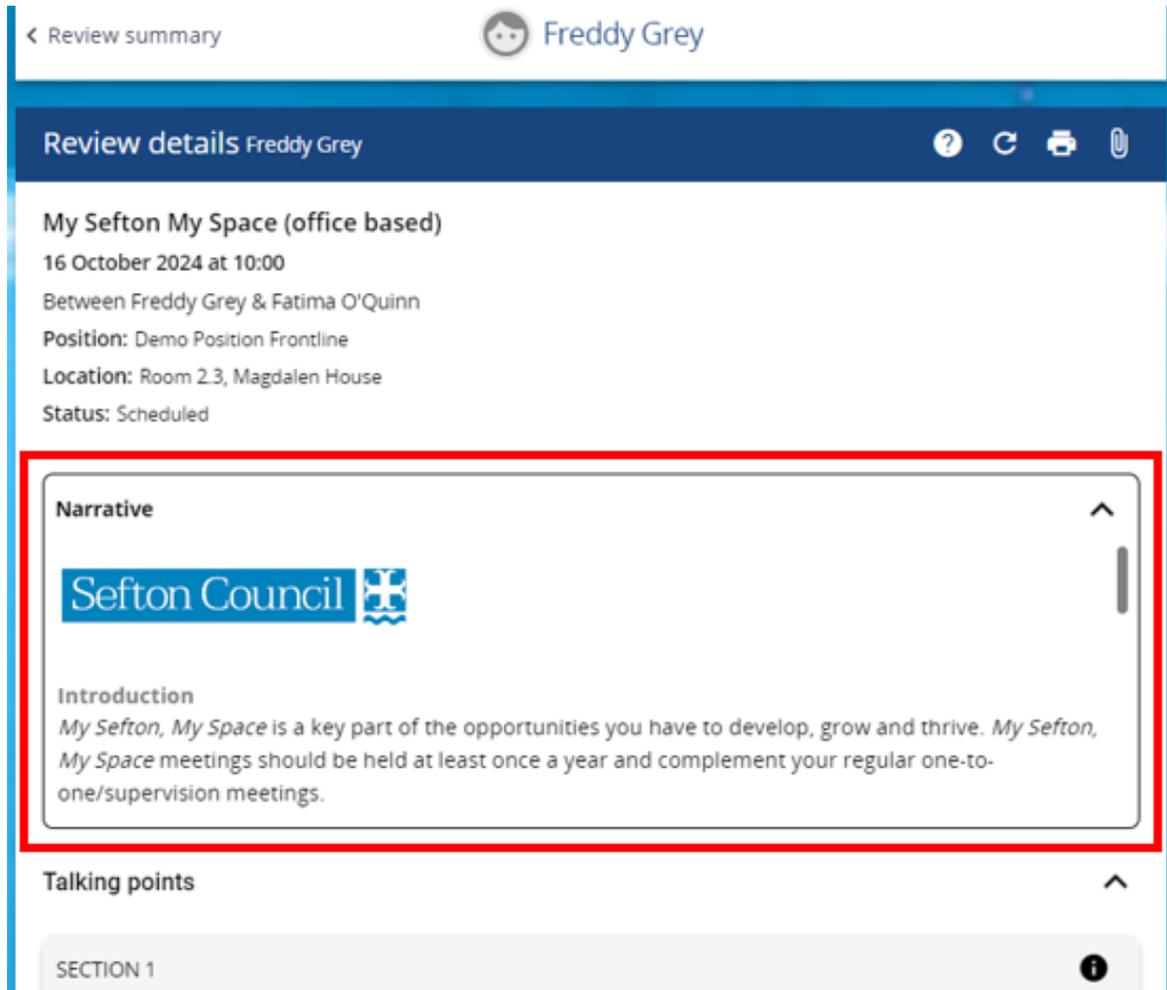
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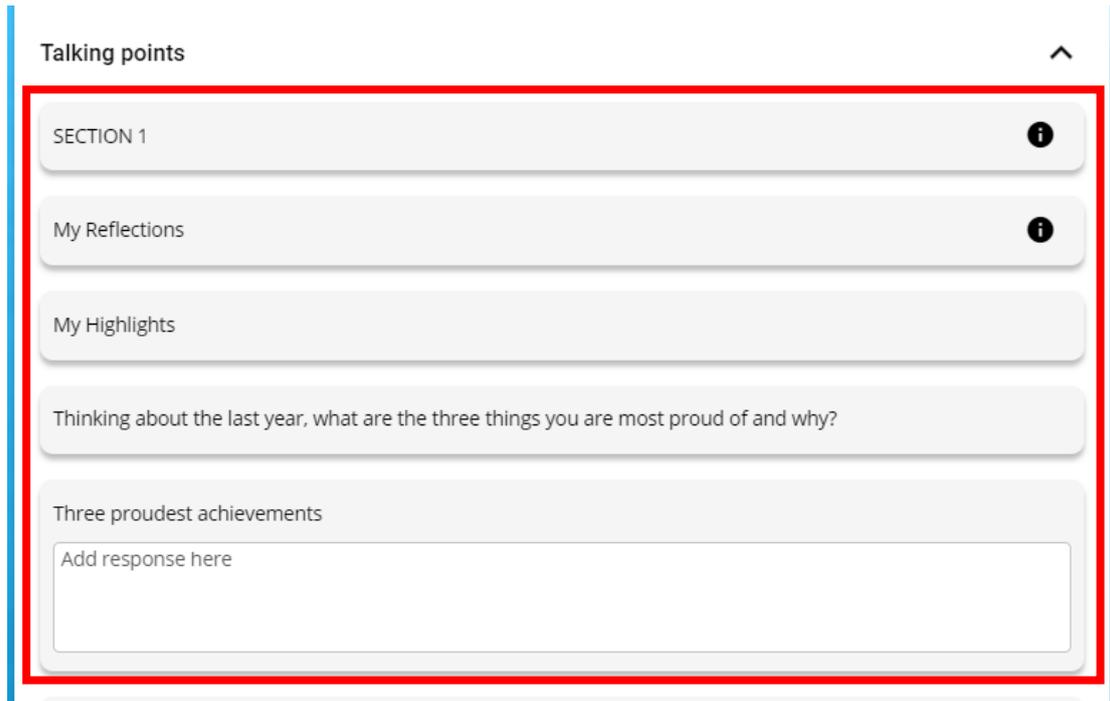
Once you have located the review, click on the **Review details** button – you will be then forwarded to complete the review.

Further Information

Review forms are typically comprised of a number of talking points. The requested input is either text, defined input through a dropdown list or radio button, or date input. Where enabled, there is also opportunity to upload files by attaching them to the review.



Found at the beginning of the review is the **Narrative** – this outlays the review purpose including any necessary information, introductions or reference points.



Scrolling down the page, found just under the **Narrative**, you will see the title for **Talking Points**; this is where all review questions are located.

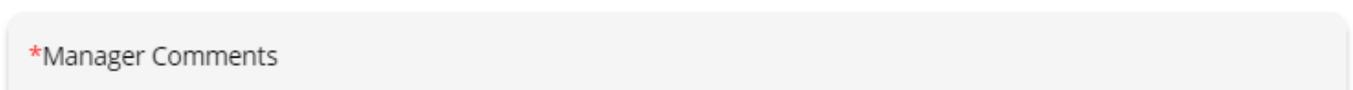
If you do not see any **Talking Points** visible, check to make sure that the panel has not been collapsed by clicking on the arrow located adjacent to the right of the **Talking Points** title.



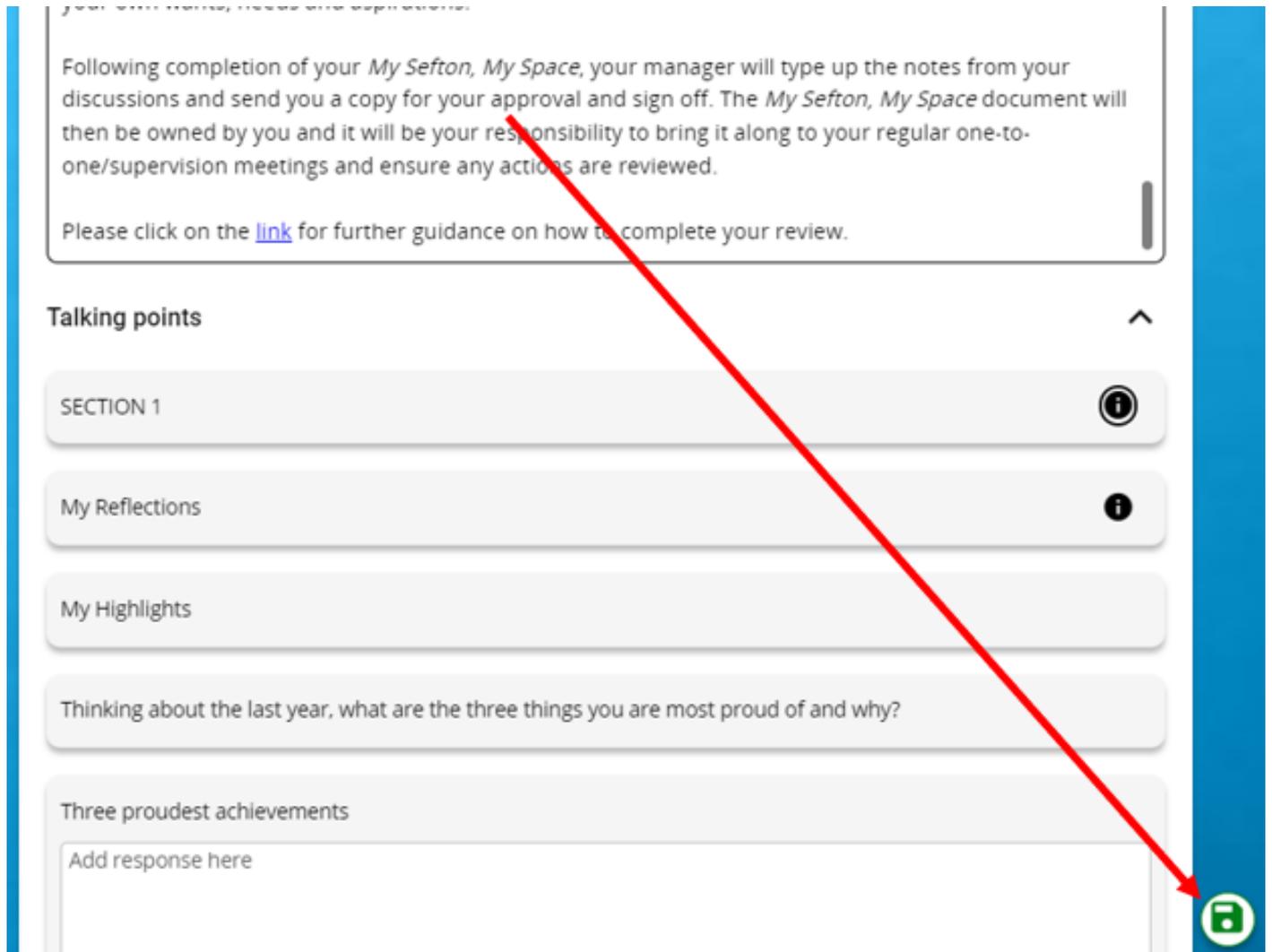
Where enabled, **Help Text** may have been setup for a question. In this **Help Text**, further information, clarification or links to resources may be included to help answer the **Talking Point** question. To view the **Help Text** for the question, click on the **i** symbol.



Some questions within a review may be mandatory – this means that they must be answered before the review can be submitted. Mandatory questions are prefaced with an asterisk (*)



IMPORTANT: Whilst completing the review, it is important that you **Save** your progress throughout the review. Failing to do so could result in answers not being committed and any progress lost. Found at the bottom of the screen, on the right-hand side is a small button with a save icon – clicking this at regular intervals will ensure that progress is saved without having to lose your position within the form.



Following completion of your *My Sefton, My Space*, your manager will type up the notes from your discussions and send you a copy for your approval and sign off. The *My Sefton, My Space* document will then be owned by you and it will be your responsibility to bring it along to your regular one-to-one/supervision meetings and ensure any actions are reviewed.

Please click on the [link](#) for further guidance on how to complete your review.

Talking points 

SECTION 1 

My Reflections 

My Highlights

Thinking about the last year, what are the three things you are most proud of and why?

Three proudest achievements

Add response here

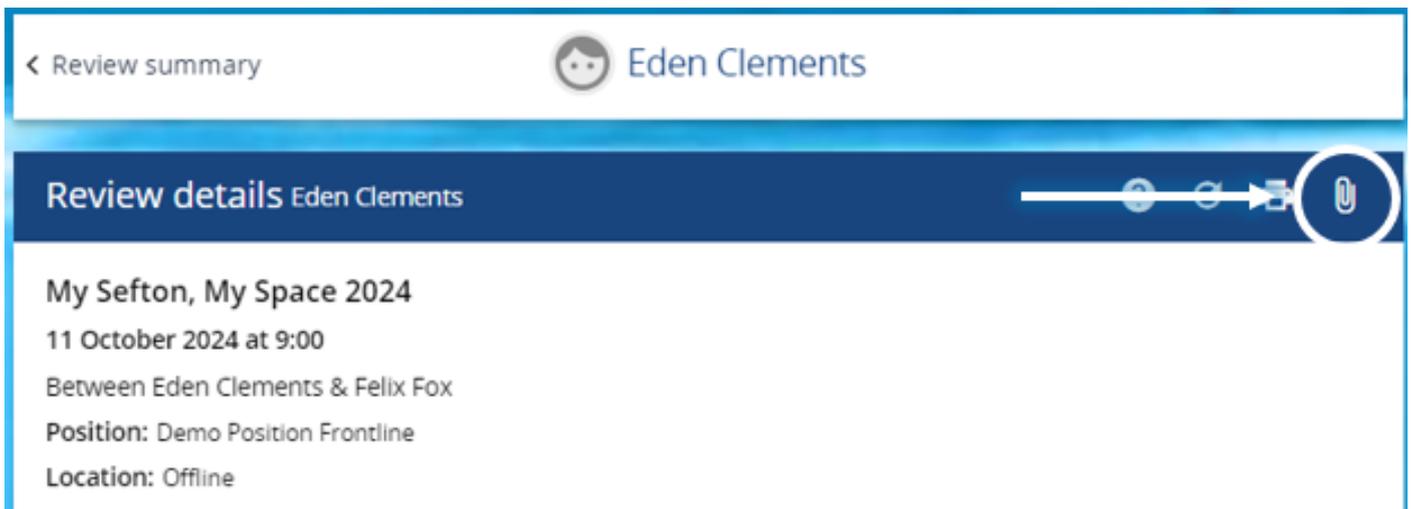


Adding Attachments

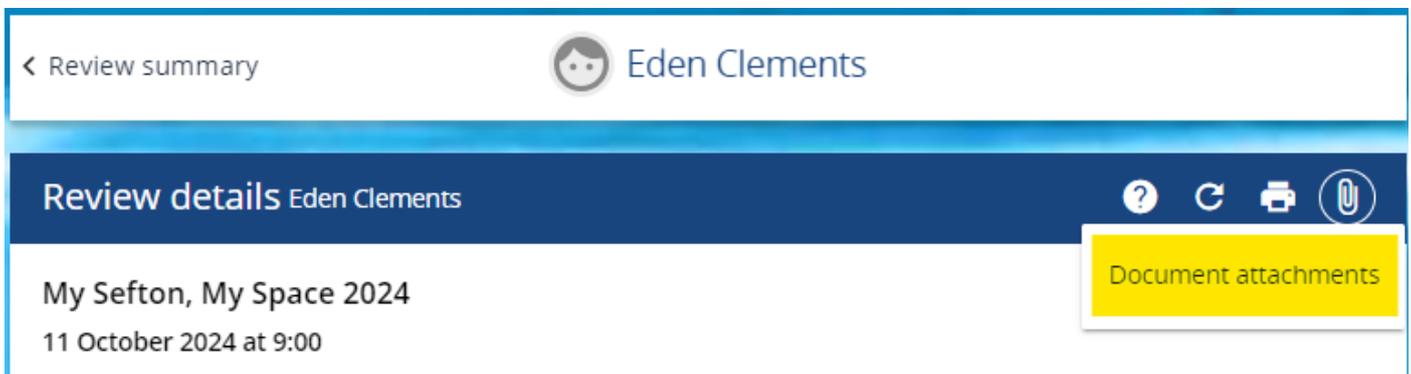
Some reviews may have a requirement to upload files – this can be completed using the **Attachments** function.

In order to add an attachment(s) to a review, you will need to be on the **Review details** screen for the applicable review.

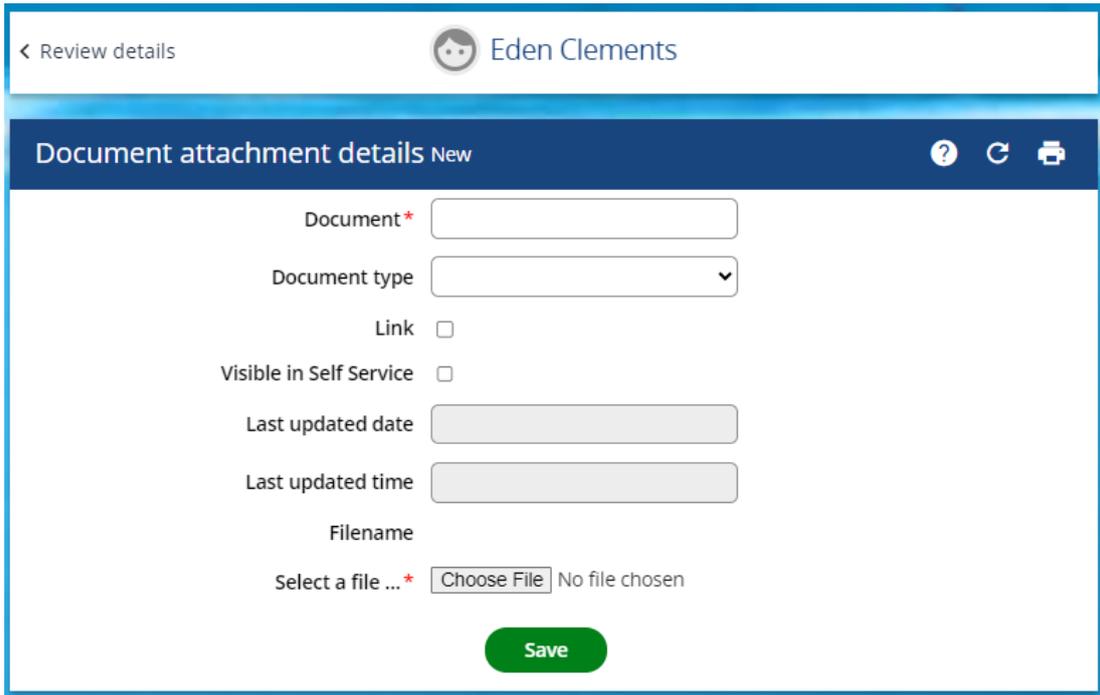
On the top of the review interface, you will see a paperclip icon.



Clicking on this icon, will show a small context menu with a single option – **Document attachments**. Click this option to be forwarded to the next screen.



On the **Document attachment details** screen, you are required to complete a number of fields.



The screenshot shows a mobile application interface for 'Document attachment details'. At the top, there is a navigation bar with a back arrow and 'Review details', and a user profile for 'Eden Clements'. Below this is a dark blue header with the title 'Document attachment details New' and icons for help, refresh, and print. The main form area contains several input fields: a text field for 'Document *', a dropdown menu for 'Document type', two checkboxes for 'Link' and 'Visible in Self Service', and two read-only text fields for 'Last updated date' and 'Last updated time'. At the bottom of the form is a 'Filename' section with a 'Select a file ... *' button, a 'Choose File' button, and the text 'No file chosen'. A green 'Save' button is centered at the bottom of the form.

Document: Give the document a title (mandatory)

Document type: Select the document type that you are uploading

Link: Clicking this link will allow you to provide a link to the file, as opposed to uploading the file direct to iTrent (not recommended)

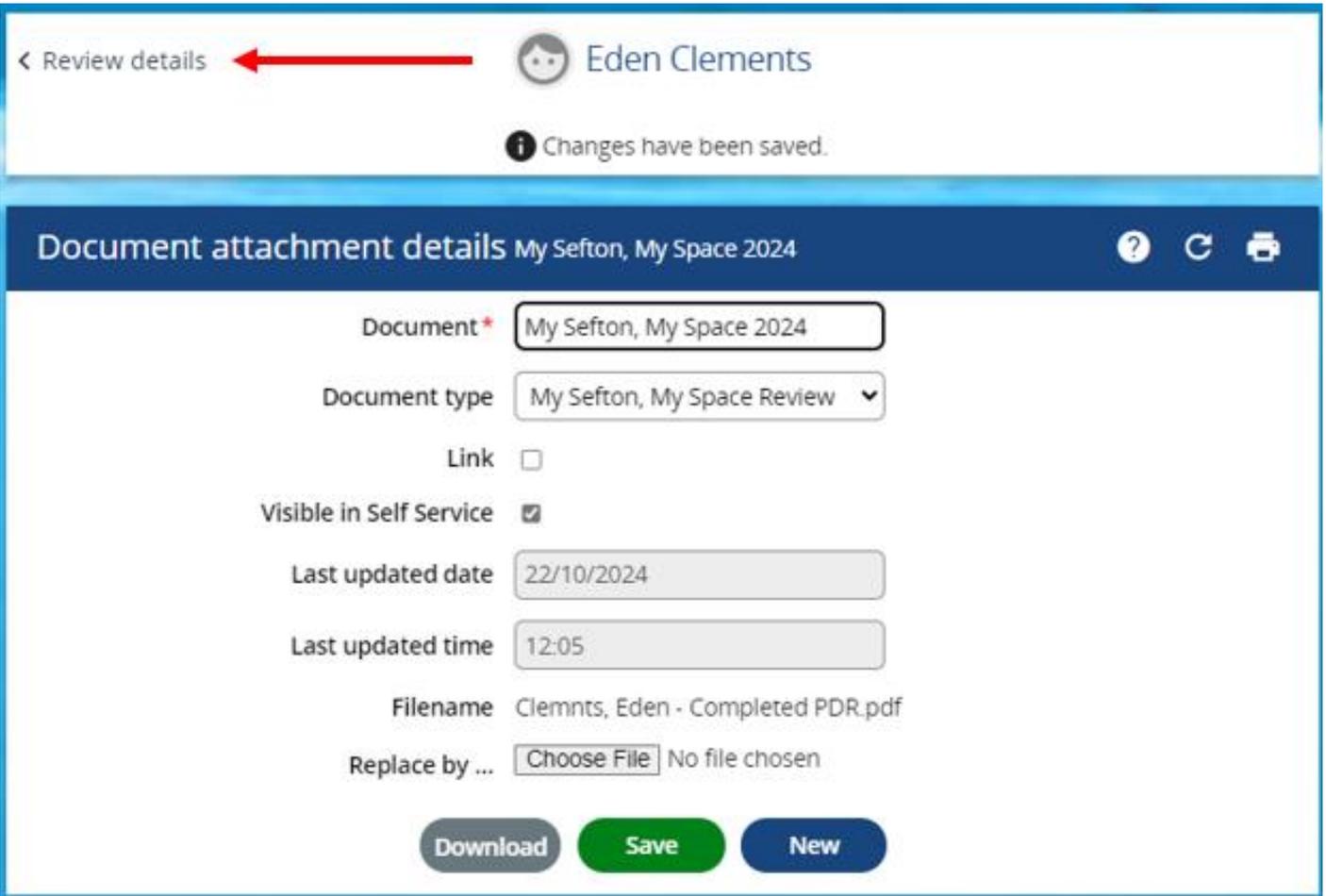
Visible in Self Service: If you want to allow the employee to see the attachment, tick this box

Last updated date: A read-only field showing the date the document was last modified

Last updated time: A read-only field showing the time the document was last modified

Select a file: Clicking this button will open up a small dialog box allowing you to navigate your machine to select the file you wish to upload

Once you have selected and uploaded your file, click on **Save** to commit the file to the review.



< Review details  Eden Clements

 Changes have been saved.

Document attachment details My Sefton, My Space 2024   

Document * My Sefton, My Space 2024

Document type My Sefton, My Space Review ▾

Link

Visible in Self Service

Last updated date 22/10/2024

Last updated time 12:05

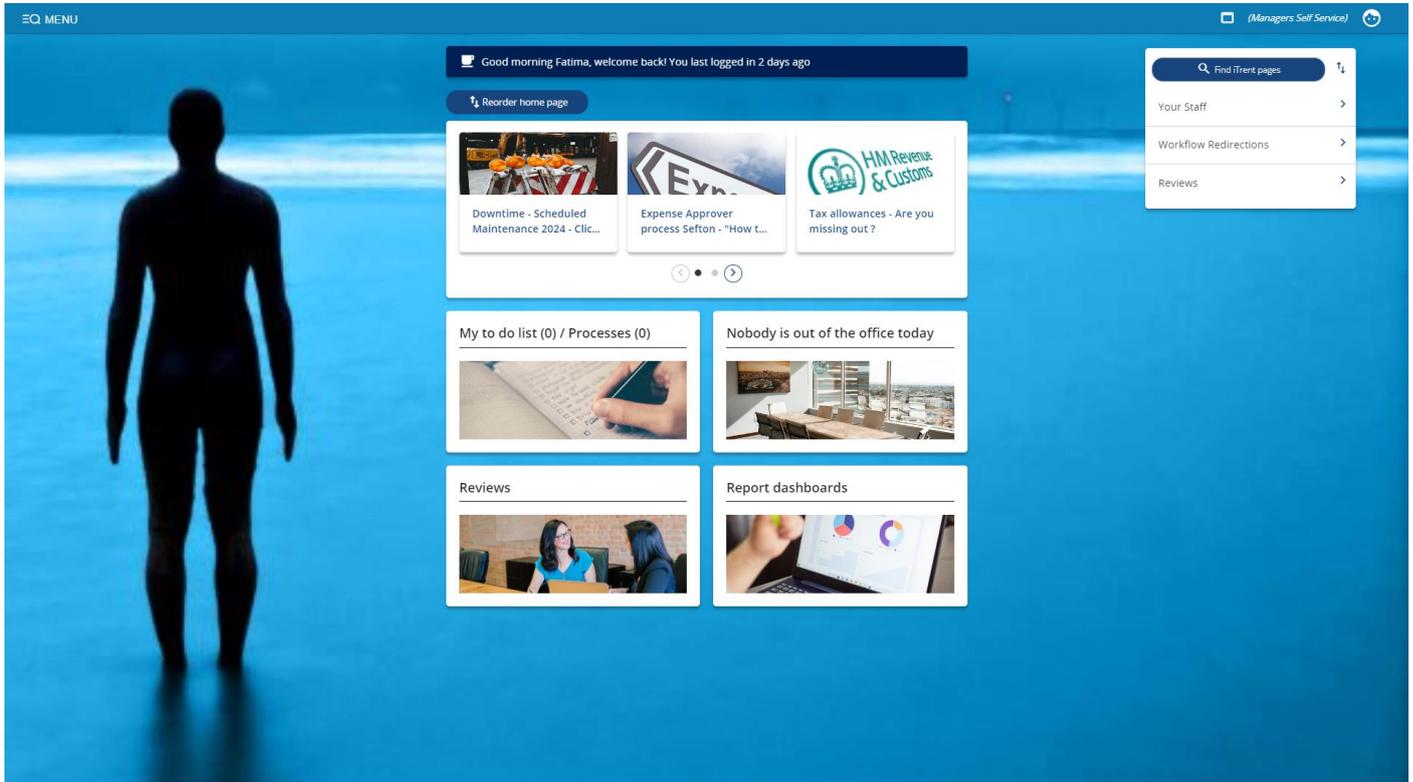
Filename Clemnts, Eden - Completed PDR.pdf

Replace by ... No file chosen

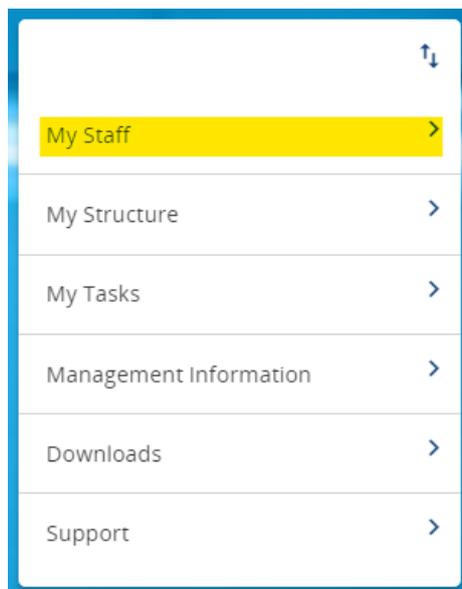
Once the screen has refreshed, click on the **Review details** text link to return back to the review.

Setting Objectives

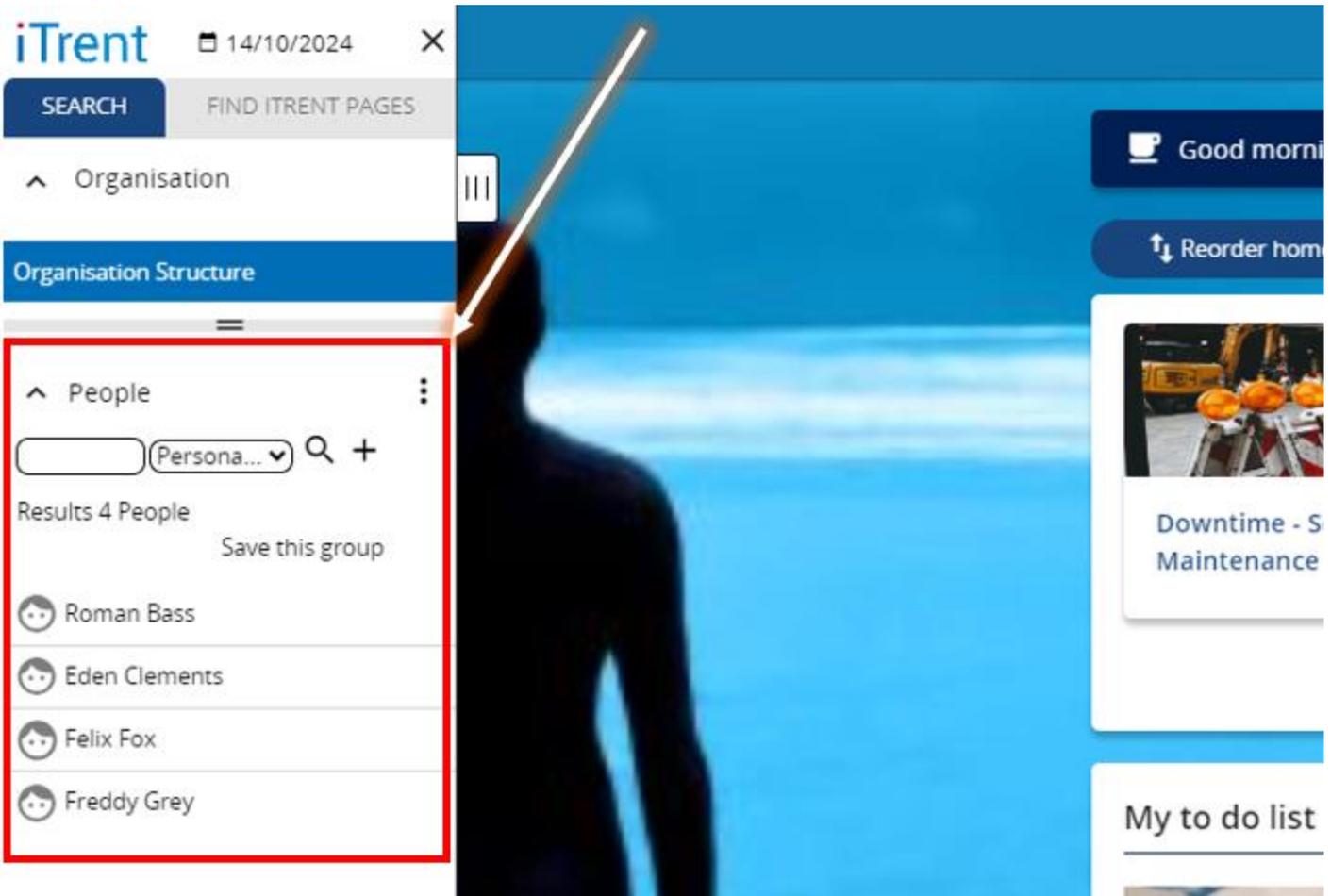
In order to set objectives, you will need to access Manager's Self Service (MSS).



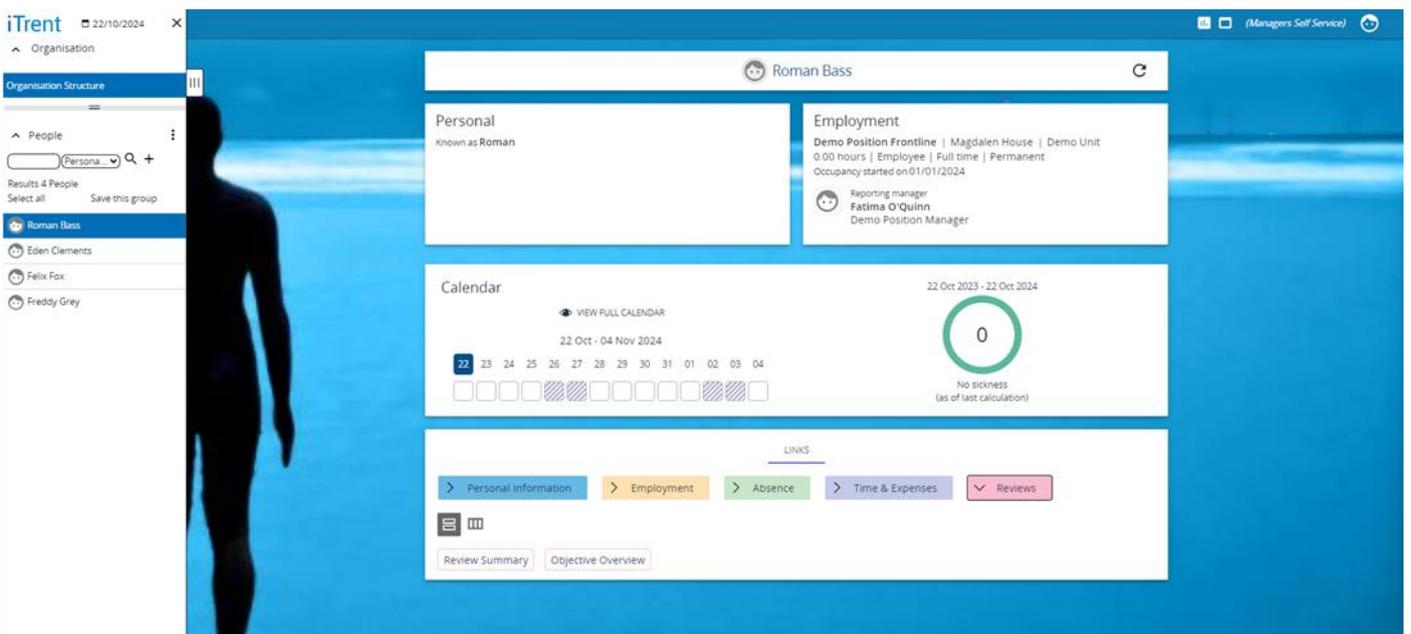
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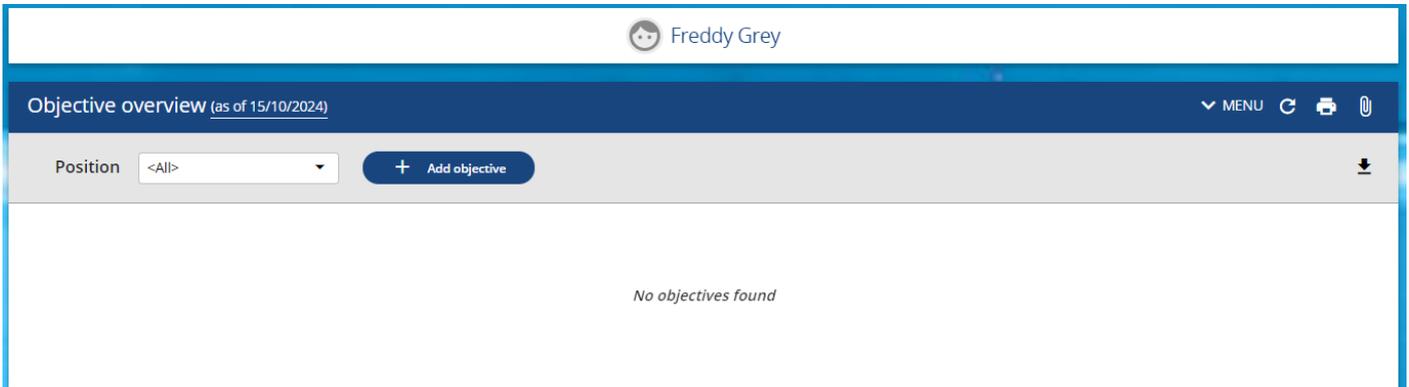
Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to set objectives.



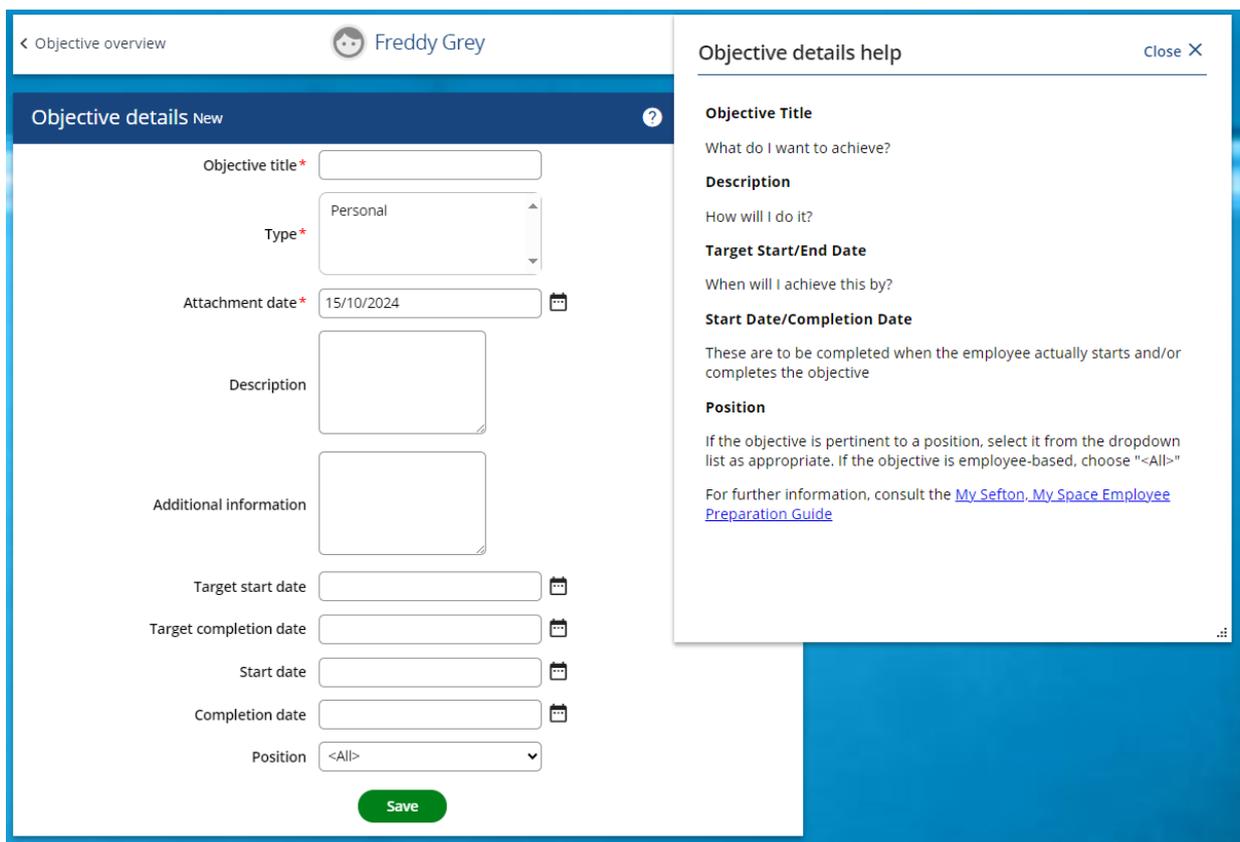
Once you have selected an employee, you will then be taken to their personal profile.



From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Objective overview**– you will then be forwarded to a new window, where you will be prompted for the date. Either enter the current date via the date picker or press the letter T on your keyboard to enter the current date automatically, then click **OK**.



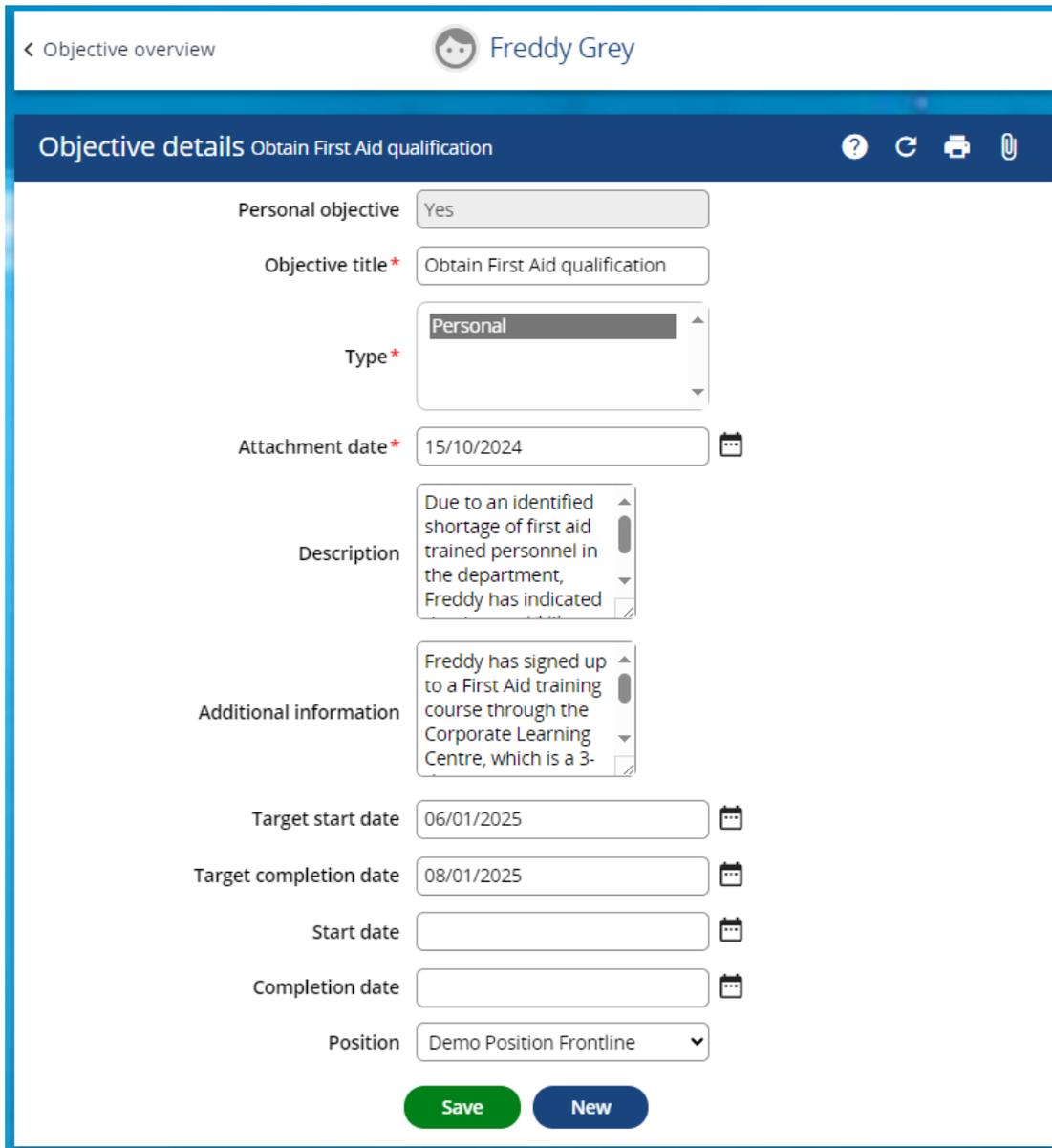
To add a new Objective for an employee, click on the **Add objective** button – you will be forwarded to the **Objective details** screen.



An initial Help Text box will be displayed, which details what each field means – to close this, click on the **Close X** link in the upper right corner; to re-display, click on the question mark found adjacent to the Objective details title.



Enter the initial Objective details, then click **Save** to create the Objective.



Objective overview Freddy Grey

Objective details Obtain First Aid qualification ? ↻ 🖨️ 📎

Personal objective

Objective title *

Type *

Attachment date * 📅

Description

Additional information

Target start date 📅

Target completion date 📅

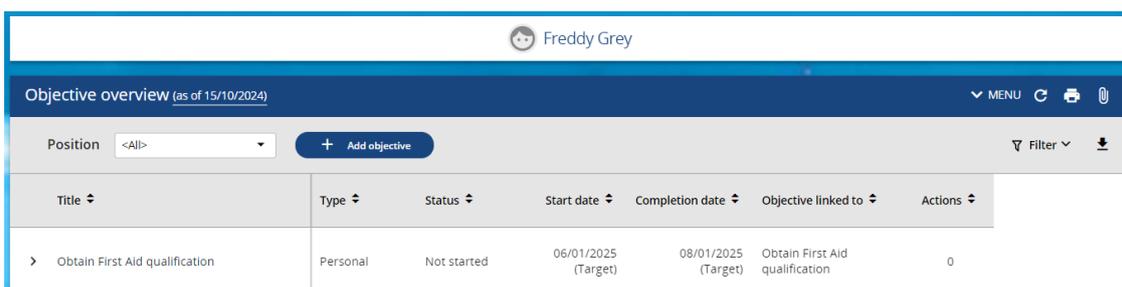
Start date 📅

Completion date 📅

Position

Save New

Click on the **Objective overview** text link found to the left of the employee's name to go back to the Objective overview screen.

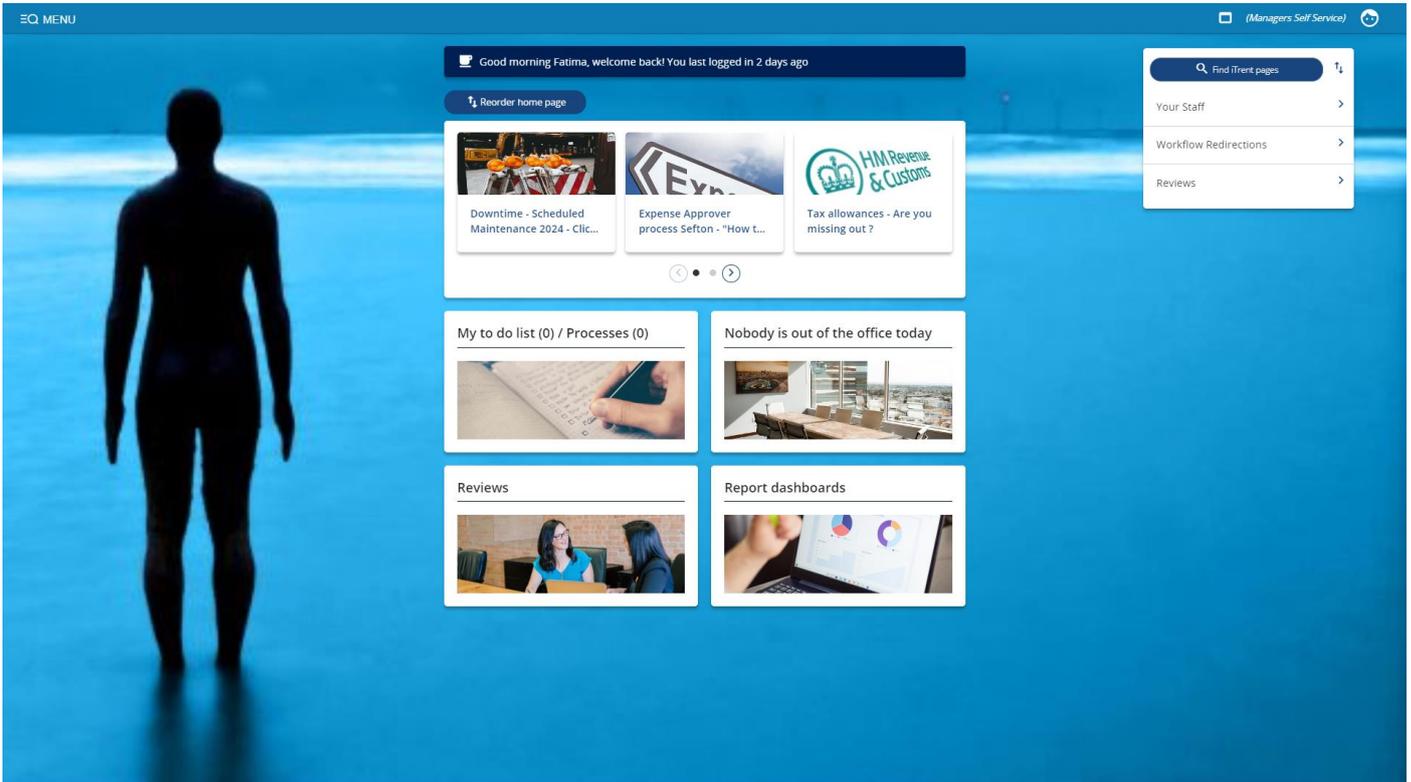
Objective overview (as of 15/10/2024) MENU ↻ 🖨️ 📎

Position + Add objective Filter ▾ ⚙️

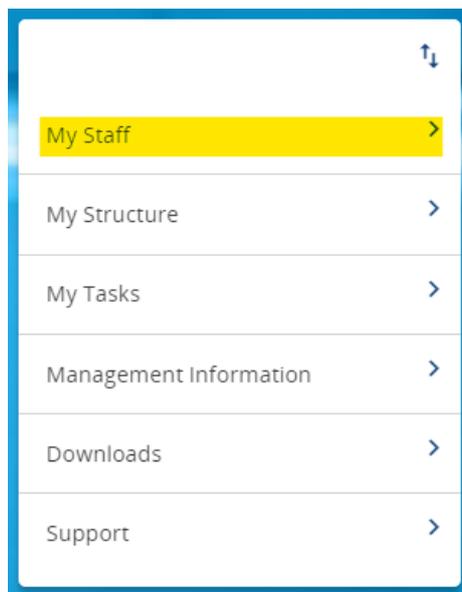
Title	Type	Status	Start date	Completion date	Objective linked to	Actions
> Obtain First Aid qualification	Personal	Not started	06/01/2025 (Target)	08/01/2025 (Target)	Obtain First Aid qualification	0

Updating Objectives

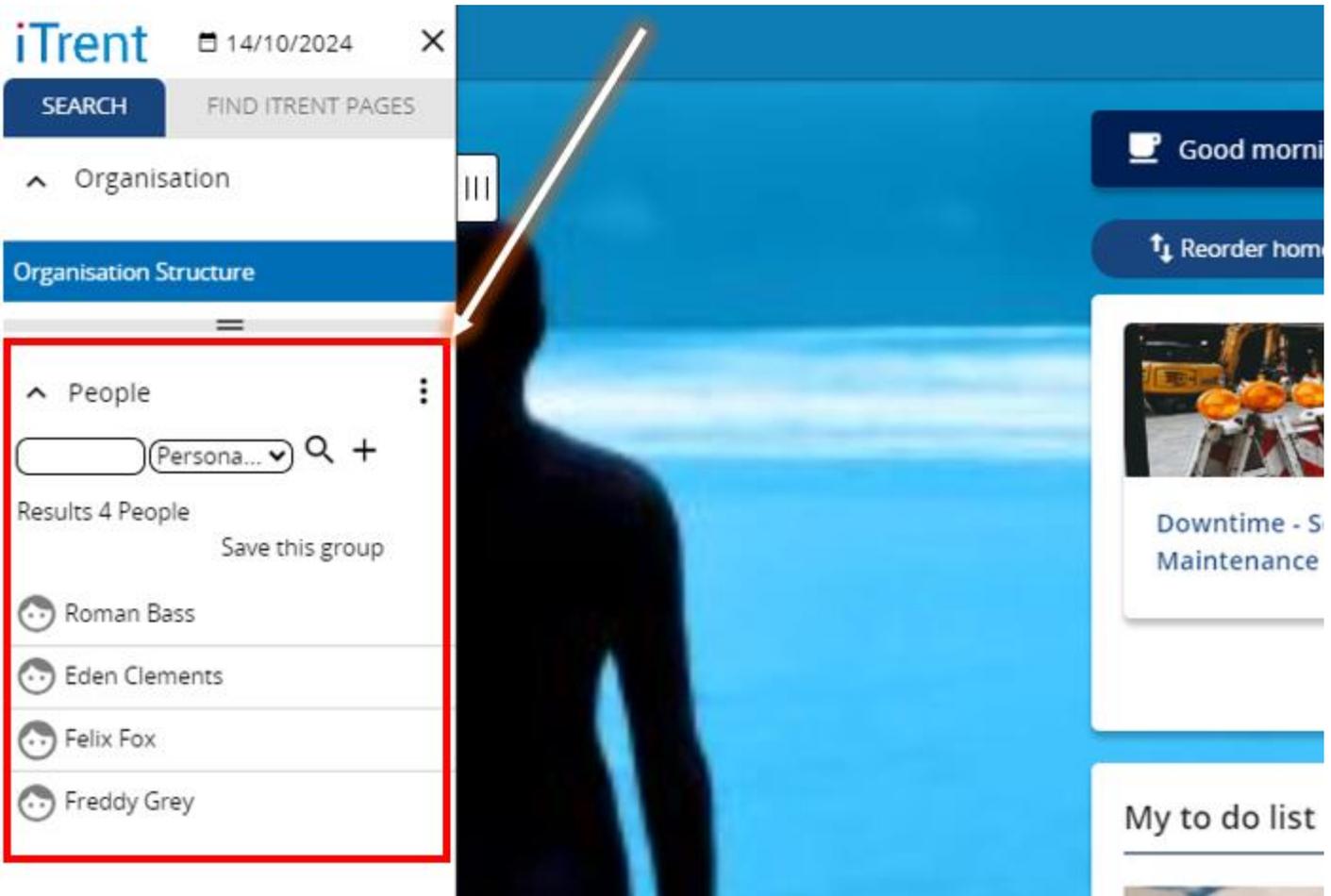
In order to update Objectives, you will need to access Manager's Self Service (MSS).



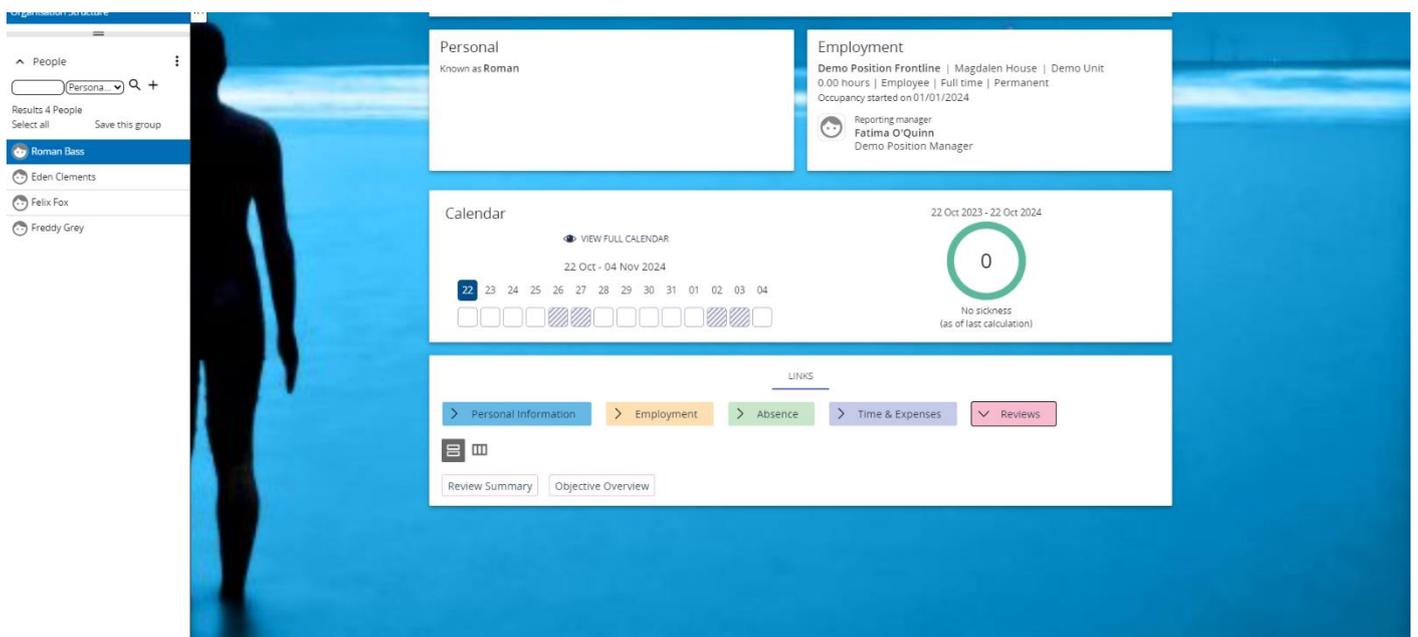
From the homepage of MSS, on the right-hand side, select the new menu option titled **My Staff**



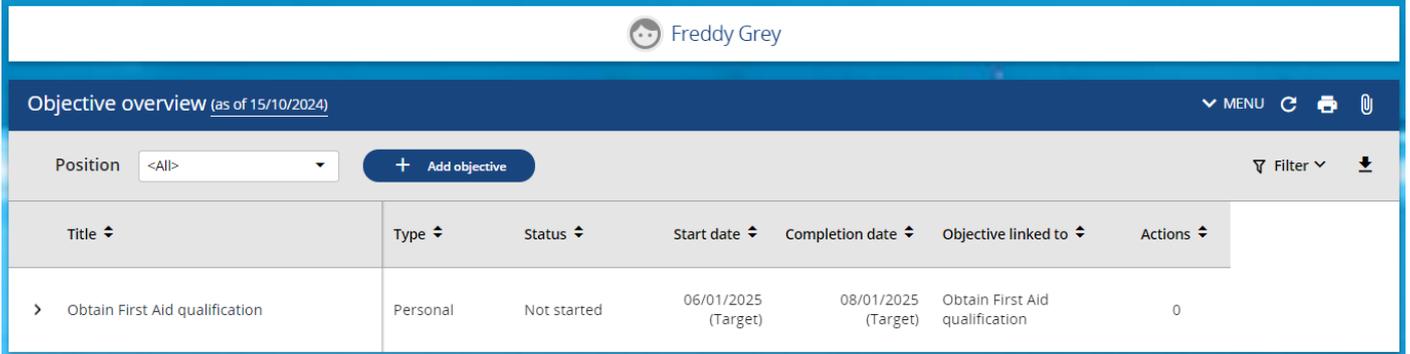
Once you click on this menu option, a blade will appear from the left-hand side (if it is not already visible) prompting you to select a staff member for whom you would like to set Objectives.



Once you have selected an employee, you will then be taken to their personal profile.

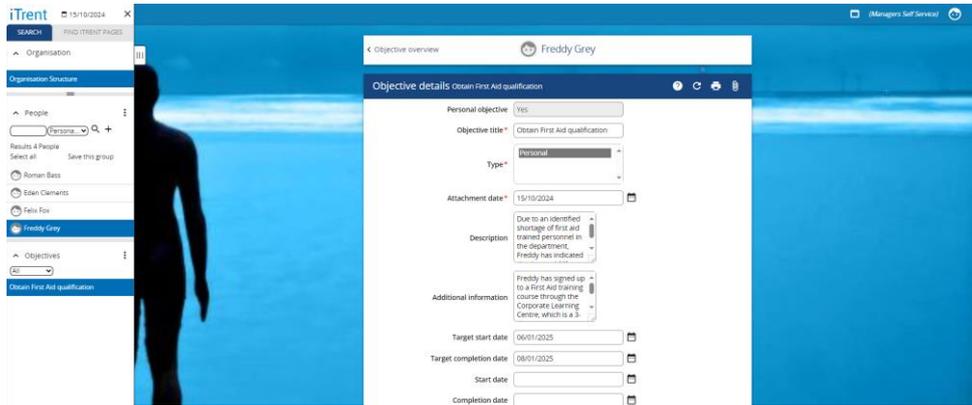


From the bottom of the personal profile, under the **Reviews** section, click on the button labelled **Objective overview**– you will then be forwarded to a new window, where you will be prompted for the date. Either enter the current date via the date picker or press the letter T on your keyboard to enter the current date automatically, then click **OK**.



Title	Type	Status	Start date	Completion date	Objective linked to	Actions
> Obtain First Aid qualification	Personal	Not started	06/01/2025 (Target)	08/01/2025 (Target)	Obtain First Aid qualification	0

To update an Objective: from the list of recorded Objectives, click on the Objective title to be forwarded to the Objective details screen.



Update Objective details as necessary, then click **Save** to update.

Click on the **Objective overview** text link found to the left of the employee's name to go back to the Objective overview screen.



