

# PDR Meeting Step-by-Step Guide for Simitive

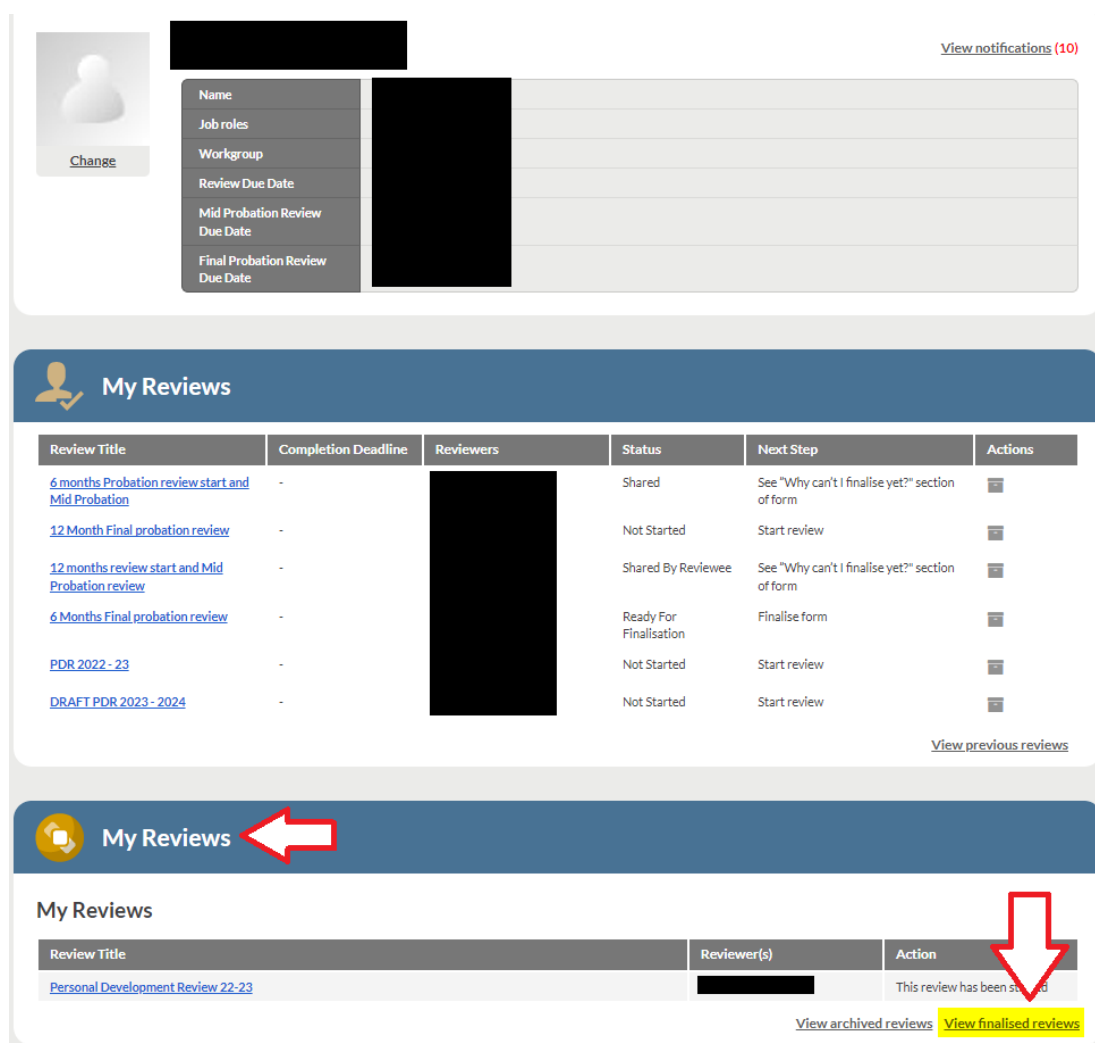
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## 1. Reviewee prepares for the PDR meeting by reviewing goals from previous probation/PDR form

1. You should open your Simitive account here: <https://paediatricspdr.simitive.com/> Log in with your SSO.

2. In the “My Reviews” area (under the Gen1 section, with the orange fan symbol) click ‘view finalised reviews’. This will show you previous reviews that have been completed and finalised.



[View notifications \(10\)](#)

**My Reviews**

Review Title	Completion Deadline	Reviewers	Status	Next Step	Actions
<a href="#">6 months Probation review start and Mid Probation</a>	-		Shared	See "Why can't I finalise yet?" section of form	
<a href="#">12 Month Final probation review</a>	-		Not Started	Start review	
<a href="#">12 months review start and Mid Probation review</a>	-		Shared By Reviewee	See "Why can't I finalise yet?" section of form	
<a href="#">6 Months Final probation review</a>	-		Ready For Finalisation	Finalise form	
<a href="#">PDR 2022 - 23</a>	-		Not Started	Start review	
<a href="#">DRAFT PDR 2023 - 2024</a>	-		Not Started	Start review	

[View previous reviews](#)


**My Reviews**

**My Reviews**

Review Title	Reviewer(s)	Action
<a href="#">Personal Development Review 22-23</a>		This review has been completed

[View archived reviews](#) [View finalised reviews](#)

3. A drop down tab will open, showing you all previously finalised reviews. Select the most recently completed form. This might be a final probation review form, or a PDR form from the previous year. Click onto the relevant form and it will open in Simitive.


**My Reviews**

### My Reviews

Review Title	Reviewer(s)	Action
<a href="#">Personal Development Review 22/23</a>		This review has been started

[View archived reviews](#) [Hide finalised reviews](#)

Review Title	Reviewer(s)	Date Finalised
<a href="#">6 months Probation review start + Mid Probation review</a>		21/03/2022
<a href="#">6 Months Final probation review</a>		31/05/2022
<a href="#">Personal Development Review 21/22</a>		21/02/2023

4. In the top right-hand corner, click on the 'save as a print-friendly PDF' button to download a PDF version of the form to your computer so that you can easily refer to as you complete your current PDR form for the upcoming review meeting.


Me

My Linked People

3 Actions


Reports

Settings



Name  
Reviewer(s)

Personal Development Review 21/22



✓ Commenters

No commenters

✓ Share

You have shared this form with your reviewer.

Finalised

This review was finalised on 21/02/2023

To be completed by all staff once they have passed their probation. Please find information and guidance on PDR (for reviewees and reviewers) here: <https://pod.admin.ox.ac.uk/pdr>

Introduction

Taking Stock

Planning ahead

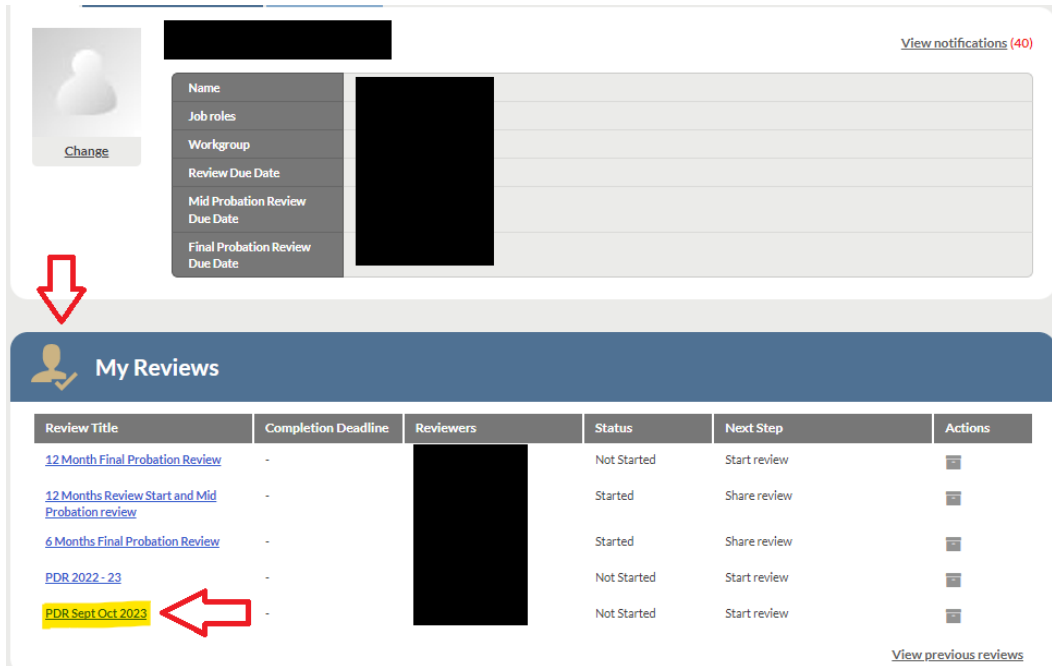
Summary

## Introduction

This form is intended to help you and your reviewer prepare for your PDR meeting and provide a template for future discussions, please complete it as fully as possible.

## 2. Reviewee prepares for the PDR meeting by completing the PDR form in Simitive

1. While logged into Simitive, in the “My Reviews” area (with the person and tick icon), click on the form titled PDR with the current academic year’s PDR period, e.g. PDR Sept Oct 2023



[View notifications \(40\)](#)

[Change](#)

Name	
Job roles	
Workgroup	
Review Due Date	
Mid Probation Review Due Date	
Final Probation Review Due Date	

**My Reviews**

Review Title	Completion Deadline	Reviewers	Status	Next Step	Actions
<a href="#">12 Month Final Probation Review</a>	-		Not Started	Start review	
<a href="#">12 Months Review Start and Mid Probation review</a>	-		Started	Share review	
<a href="#">6 Months Final Probation Review</a>	-		Started	Share review	
<a href="#">PDR 2022 - 23</a>	-		Not Started	Start review	
<a href="#">PDR Sept Oct 2023</a>	-		Not Started	Start review	

[View previous reviews](#)

2. As the reviewee, you will need to set a meeting date on the system. Under ‘meeting date’, click ‘set’.

[REDACTED] PDR 2023 - 2024

---

Finalisation open from:  
-


Completion deadline:  
-

Status:  
**Not Started**

---

✗ **Meeting Date**

Set a meeting date to discuss and agree this review.



Set

Skip

✓ **Reviewers**

1. [REDACTED] (default)

Reviewer History

Add

---

✗ **Share**

You have not yet shared this review.

After answering one question, a button will appear allowing you to share answers with other participants.

✓ **Save And Close**

Your changes won't be shared when leaving the review.

save and close

---

✓ Options, Attachments & Printable PDF

---

**Mandatory fields**

All mandatory fields are indicated by a \* symbol. They must be filled out before the review can be finalised.

ON

Highlight mandatory review questions

Generate Printable PDF

Add Attachment

View & Manage Attachments

Keyboard Shortcuts

3. Scroll down and read through the Introduction tab. If you would like further information about the PDR process, click the logo to go to the Personal Development page of our HR intranet.

4. Click on the 'Taking Stock' tab to start this first section.


***Please note***, questions marked in red are mandatory and will need to be completed before the form can be finalised. It is possible to initially share the form with your reviewer without completing all of these, but you will need to complete them before finalising the form at the end of the process.

Introduction

Taking Stock

Planning ahead

Summary

**Introduction** 

This form is intended to help you and your reviewer prepare for your PDR meeting and provide a template for future discussions, please complete it as fully as possible.


**Overview of discussion**

The form has the following structure:

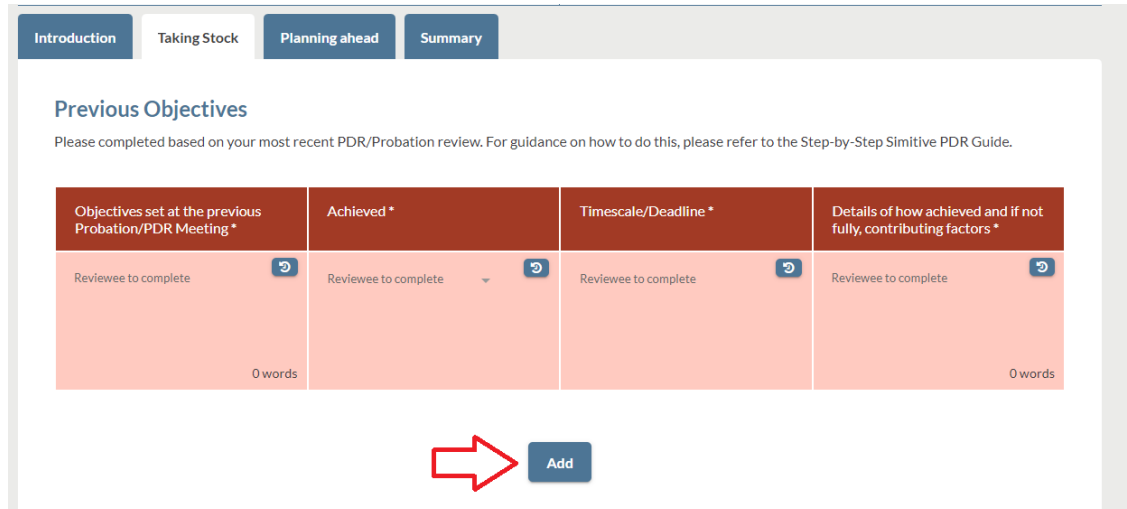
1. Taking Stock:
  - Discussion about successes and achievements since last review (or since time in post), including completed training
  - Identification of any barriers to developmental and work-related goals
  - Discussion about wellbeing and workload
  - Review of job description, core areas of current role and responsibilities and any changes since last review (or since time in post)
2. Planning Ahead:
  - Discussion about longer term future career and development aspirations
  - Setting objectives for the next period, considering training and development needs

**Further Resources**

For guidance and further information about the PDR process, please click on the logo below:








5. Refer to the previous PDR/Probation form you downloaded in Section 1 to complete the 'Previous Objectives' section. Click on the 'add' button to add additional rows, including one per goal. Select whether the objective was achieved, and provide further details in the final column. Please be as truthful as possible, as this will help in determining training needs.



**Previous Objectives**

Please completed based on your most recent PDR/Probation review. For guidance on how to do this, please refer to the Step-by-Step Simitive PDR Guide.

Objectives set at the previous Probation/PDR Meeting *	Achieved *	Timescale/Deadline *	Details of how achieved and if not fully, contributing factors *
Reviewee to complete  0 words	Reviewee to complete  0 words	Reviewee to complete  0 words	Reviewee to complete  0 words

 **Add**


6. Scroll down and complete the 'Your Performance' section, answering the questions.


7. Note which mandatory training courses you have completed in the last year.


8. Note which further training courses you have completed over the last year to support your development. This might include internal courses offered by the University, or external professional diplomas.

9. Scroll down and complete the 'Mentoring', 'Workload', 'Role Specifics' and 'Further Questions' sections.

10. If at any point you need to stop, click the 'Save and Close' button which appears on the right-hand side of the top banner. This will save your progress, and enable you to return and pick up from where you left off at a later time.

 **Share**  
 You have not yet shared this review.  
 After answering one question, a button will appear allowing you to share answers with other participants.

 **Save And Close**  
 Your changes won't be shared when leaving the review.



save and close

Reviewee to complete

Would you like to sit on any committees, if so which committees? \*
 

View History

Reviewee to complete

Do you have any other workplace responsibilities? e.g. Health and Safety duties \*
 

View History

Reviewee to complete

Please provide details of other workplace responsibilities
 

View History

Reviewee to complete

Which public engagement/outreach events have you been involved in over the last year? \*
 

View History

Reviewee to complete

0 words

Previous Page

Next Page

11. Navigate to the next tab, 'Planning Ahead'. You can do this by scrolling to the bottom and clicking the 'next page' button to continue, or you can scroll back up, and use the blue tabs to navigate to 'Planning Ahead'.

Introduction

Taking Stock

Planning ahead

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## Planning Ahead

Main objectives for the next 12 months

12. Complete the 'Career Planning' section.

13. Complete the main objectives for the next 12 months. Click the 'add' button to include additional rows, using one for each objective

Review(s) to complete


0 words

### Main objectives for the next 12 months

You may wish to consider the following areas: Research, Professional Practice, Collaboration, Wellbeing, Leadership.

Consider your future career aspiration. What can you do in the next 12 months to reach these


What do I want/need to learn? *	What will I do to achieve this? *	What resources or support will I need? Please include internal/external training *	What will my success criteria be? *	What are my target dates for review and completion? *
Reviewee to complete	Reviewee to complete	Reviewee to complete	Reviewee to complete	Reviewee to complete
0 words	0 words	0 words	0 words	0 words


 [Add](#)

[Previous Page](#) [Next Page](#)

14. If at any point you need to stop, click the 'Save and Close' button which appears on the right-hand side of the top banner, as in step 2.9 previously. This will save your progress, and enable you to return and pick up from where you left off at a later time.


15. Navigate to the final tab, 'Summary'. You can do this by scrolling to the bottom and clicking the 'next page' button to continue, or you can scroll back up, and use the blue tabs to navigate to 'Summary'.

 **Share**  
You have not yet shared this review.  
After answering one question, a button will appear allowing you to share answers with other participants.

 **Save And Close**  
Your changes won't be shared when leaving the review.

[save and close](#)

[Introduction](#) [Taking Stock](#) [Planning ahead](#) [Summary](#)



### Career Planning

What are your future career aspirations? \*

Reviewee to complete

Reviewer's comments. Please discuss and consider the Rewards and Recognition Scheme. If applicable, ensure that the objectives below clarify the success criteria required to qualify for line manager nomination \*

Review(s) to complete

0 words

### Main objectives for the next 12 months

You may wish to consider the following areas: Research, Professional Practice, Collaboration, Wellbeing, Leadership.

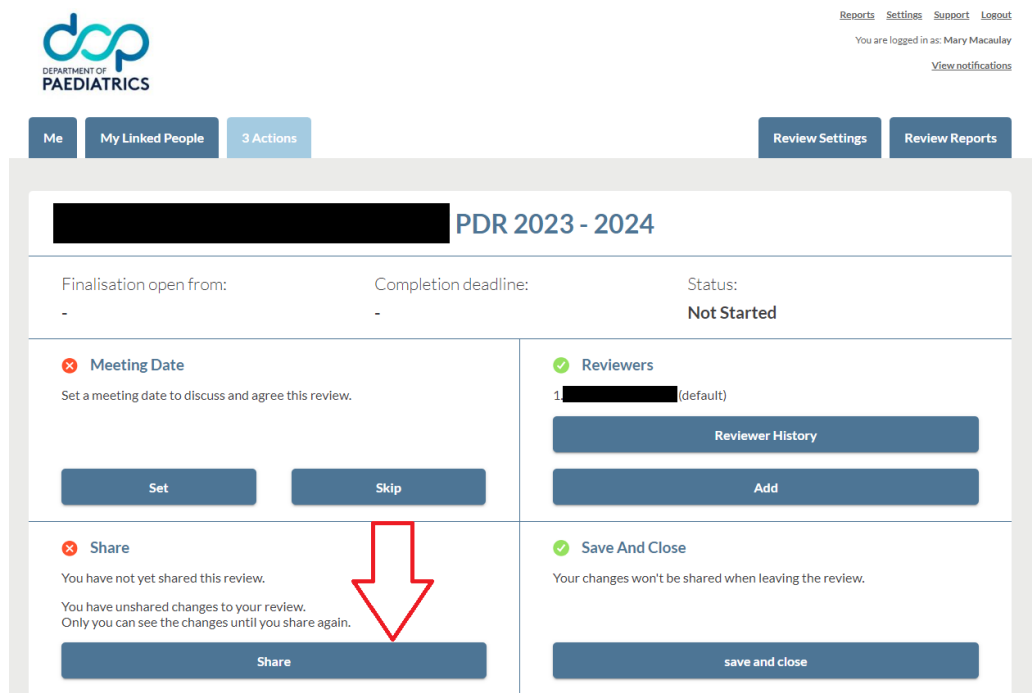
Consider your future career aspiration. What can you do in the next 12 months to reach these

16. Under 'Any Other Discussions', note any other points you would like to raise with your line manager for discussion. If there are none, put 'N/A' or 'none'.



17. Click the 'Save and Close' button which appears on the right-hand side of the top banner, as in step 9 previously. This will save your progress, and enable you to return and pick up from where you left off at a later time.

18. When you are happy with the form, and ready to share this with your line manager ahead of the meeting, scroll to the top of the form, and click on the 'Share' button



The screenshot shows the 'PDR 2023 - 2024' form interface. At the top, there is a navigation bar with links for 'Reports', 'Settings', 'Support', and 'Logout'. Below this, it says 'You are logged in as: Mary Macaulay' and a link to 'View notifications'. The main header area includes 'Me', 'My Linked People', '3 Actions', 'Review Settings', and 'Review Reports'. The form title is 'PDR 2023 - 2024'. Below the title, there are fields for 'Finalisation open from:', 'Completion deadline:', and 'Status:'. The 'Status' is 'Not Started'. The form is divided into four sections: 'Meeting Date' (with 'Set' and 'Skip' buttons), 'Reviewers' (with a list of reviewers and 'Reviewer History' and 'Add' buttons), 'Share' (with a 'Share' button), and 'Save And Close' (with a 'save and close' button). A red arrow points to the 'Share' button.

19. It will be helpful to have a copy of the completed form to hand in the meeting. The reviewee can either log into Simitive on their laptop and share their screen, or save it as a print-friendly PDF to download and print a hard copy if this is preferred.

20. To generate a PDF, click the 'Options, Attachments & Printable PDF' title in the top banner, then click 'Generate Printable PDF'

**PDR 2023 - 2024**

Finalisation open from: -	Completion deadline: -	Status: <b>Not Started</b>
------------------------------	---------------------------	-------------------------------

✗ **Meeting Date**

Set a meeting date to discuss and agree this review.

Set

Skip

✗ **Share**

You have not yet shared this review.  
You have unshared changes to your review.  
Only you can see the changes until you share again.

Share

✓ **Reviewers**

1. [redacted] (default)

Reviewer History

Add

✓ **Save And Close**

Your changes won't be shared when leaving the review.

save and close

∨ **Options, Attachments & Printable PDF**

**Mandatory fields**

All mandatory fields are indicated by a \* symbol. They must be filled out before the review can be finalised.

ON

Highlight mandatory review questions

Generate Printable PDF

Add Attachment

View & Manage Attachments

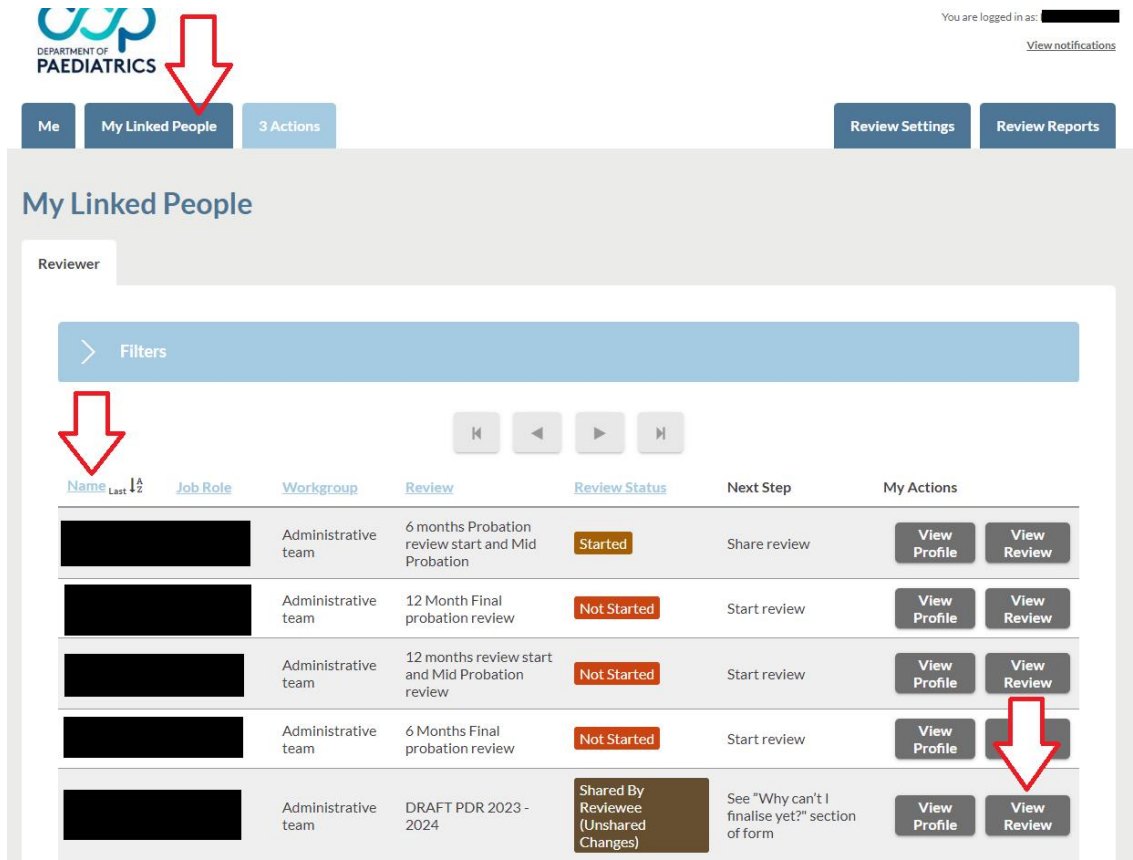
Keyboard Shortcuts

### 3. Reviewer Prepares for the PDR Meeting

1. You may find it helpful to refer to resources for reviewers here: <https://pod.admin.ox.ac.uk/for-reviewers>

2. Open your Simitive account here: <https://paediatricspdr.simitive.com/>. Log in with your SSO.

3. Click on 'My Linked People' tab to see review forms that have been shared with you. Identify the correct employee in the 'Name' column, then under 'My Actions' click on 'View Review'.



The screenshot shows the 'My Linked People' section of the Simitive interface. At the top, there are tabs for 'Me', 'My Linked People' (highlighted with a red arrow), and '3 Actions'. To the right, there are buttons for 'Review Settings' and 'Review Reports'. Below the tabs, the 'My Linked People' section is displayed. It includes a 'Reviewer' tab and a 'Filters' button. A table lists employees with the following columns: Name (with a sort icon), Job Role, Workgroup, Review, Review Status, Next Step, and My Actions. The table contains five rows of data. The last row has a red arrow pointing to the 'View Review' button in the 'My Actions' column.

Name	Job Role	Workgroup	Review	Review Status	Next Step	My Actions
[Redacted]	Administrative team	Administrative team	6 months Probation review start and Mid Probation	Started	Share review	View Profile View Review
[Redacted]	Administrative team	Administrative team	12 Month Final probation review	Not Started	Start review	View Profile View Review
[Redacted]	Administrative team	Administrative team	12 months review start and Mid Probation review	Not Started	Start review	View Profile View Review
[Redacted]	Administrative team	Administrative team	6 Months Final probation review	Not Started	Start review	View Profile View Review
[Redacted]	Administrative team	Administrative team	DRAFT PDR 2023 - 2024	Shared By Reviewee (Unshared Changes)	See "Why can't I finalise yet?" section of form	View Profile View Review

4. Read through what the employee has shared, noting on any points you would like to discuss further or comment on in the meeting, and consider how this compares to your insights.

5. To navigate between the different sections there are two options. You can do this by scrolling to the bottom of the section and clicking the 'next page' button to continue, or you can scroll back up, and use the blue tabs at the top to navigate to the next section.

✖ Share

You have not yet shared this review.

After answering one question, a button will appear allowing you to share answers with other participants.

Share

✔ Save And Close

Your changes won't be shared when leaving the review.

save and close

Introduction

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Summary

Previous Objectives

Please completed based on your most recent PDR/Probation review. For guidance on how to do this, please refer to the Step-by-Step Simitive PDR Guide.

Objectives set at the previous Probation/PDR Meeting *	Achieved *	Timescale/Deadline *	Details of how achieved and if not fully, contributing factors *
test	Yes	30/04/2023	test

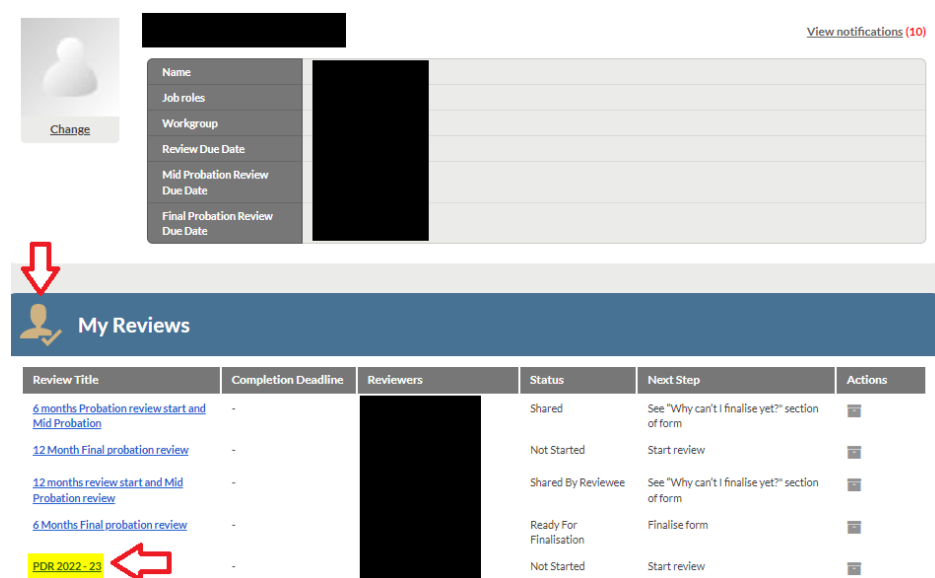
Add

## 4. Hold the PDR Meeting

1. It will be helpful to have a copy of the completed form to hand in the meeting. It may be preferable to view the form electronically in Simitive, so that if additional objectives are discussed, these can be added by the reviewer and the form amended in the moment. Alternatively, they can be noted on paper and the Simitive form updated following the meeting.

2. You can download a PDF version of the form, which can be printed for reference during the meeting.

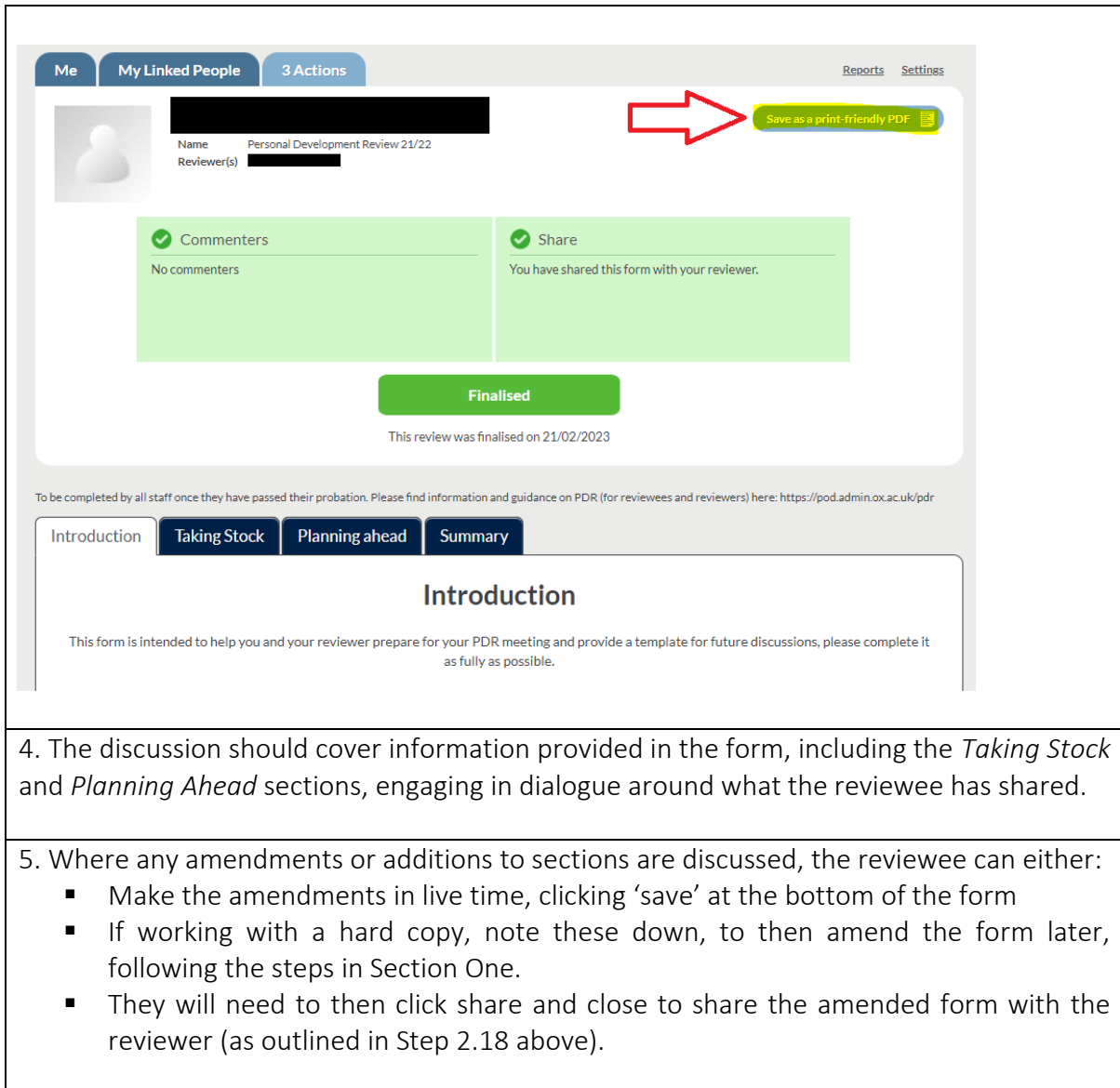
In the “My Reviews” area (with the person and tick icon), click on the form titled PDR with the current academic year.



**My Reviews**

Review Title	Completion Deadline	Reviewers	Status	Next Step	Actions
<a href="#">6 months Probation review start and Mid Probation</a>	-		Shared	See "Why can't I finalise yet?" section of form	
<a href="#">12 Month Final probation review</a>	-		Not Started	Start review	
<a href="#">12 months review start and Mid Probation review</a>	-		Shared By Reviewee	See "Why can't I finalise yet?" section of form	
<a href="#">6 Months Final probation review</a>	-		Ready For Finalisation	Finalise form	
<b>PDR 2022 - 23</b>	-		Not Started	Start review	

3. In the top right-hand corner, click on the ‘save as a print-friendly PDF’ button to download a PDF version of the form to your computer, which can be printed, or viewed electronically during the meeting.



Me My Linked People 3 Actions Reports Settings

Name [Redacted] Reviewer(s) [Redacted]

Save as a print-friendly PDF

✓ Commenters  
No commenters

✓ Share  
You have shared this form with your reviewer.

Finalised  
This review was finalised on 21/02/2023

To be completed by all staff once they have passed their probation. Please find information and guidance on PDR (for reviewees and reviewers) here: <https://pod.admin.ox.ac.uk/pdr>

Introduction Taking Stock Planning ahead Summary

### Introduction

This form is intended to help you and your reviewer prepare for your PDR meeting and provide a template for future discussions, please complete it as fully as possible.

4. The discussion should cover information provided in the form, including the *Taking Stock* and *Planning Ahead* sections, engaging in dialogue around what the reviewee has shared.

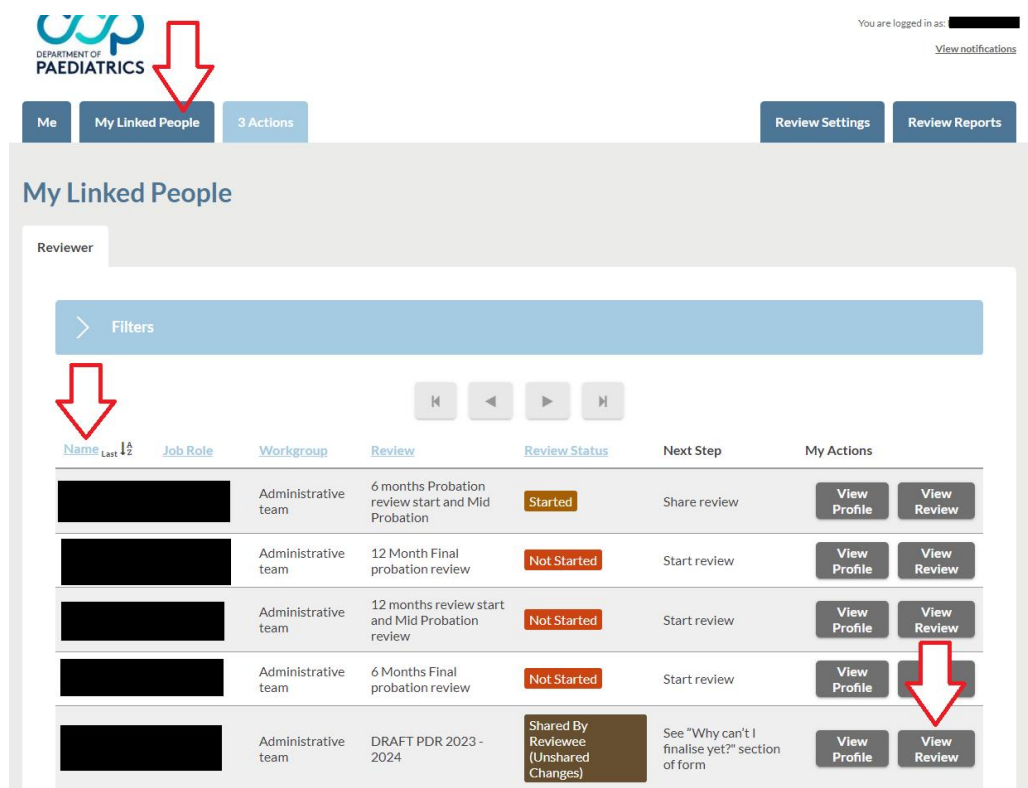
5. Where any amendments or additions to sections are discussed, the reviewee can either:

- Make the amendments in live time, clicking 'save' at the bottom of the form
- If working with a hard copy, note these down, to then amend the form later, following the steps in Section One.
- They will need to then click share and close to share the amended form with the reviewer (as outlined in Step 2.18 above).

## 5. Reviewer Adds Comments to the Form After the Meeting

1. You should open your Simitive account here: <https://paediatricspdr.simitive.com/>. Log in with your SSO.

2. Click on 'My Linked People' tab to see review forms that have been shared with you. Identify the correct employee in the 'Name' column, then under 'My Actions' click on 'View Review'



The screenshot shows the 'My Linked People' section of the Simitive interface. At the top, there are tabs for 'Me', 'My Linked People' (highlighted with a red arrow), and '3 Actions'. To the right, there are buttons for 'Review Settings' and 'Review Reports'. Below the tabs, the 'My Linked People' section is displayed. It includes a 'Reviewer' label and a 'Filters' button. A table lists review forms with columns: Name, Job Role, Workgroup, Review, Review Status, Next Step, and My Actions. A red arrow points to the 'View Review' button in the 'My Actions' column for the last row of the table.

Name	Job Role	Workgroup	Review	Review Status	Next Step	My Actions
[Redacted]	Administrative team	Administrative team	6 months Probation review start and Mid Probation	Started	Share review	View Profile, View Review
[Redacted]	Administrative team	Administrative team	12 Month Final probation review	Not Started	Start review	View Profile, View Review
[Redacted]	Administrative team	Administrative team	12 months review start and Mid Probation review	Not Started	Start review	View Profile, View Review
[Redacted]	Administrative team	Administrative team	6 Months Final probation review	Not Started	Start review	View Profile, View Review
[Redacted]	Administrative team	Administrative team	DRAFT PDR 2023 - 2024	Shared By Reviewee (Unshared Changes)	See "Why can't I finalise yet?" section of form	View Profile, View Review

3. To navigate between the different sections there are two options. You can do this by scrolling to the bottom of the section and clicking the 'next page' button to continue, or you can scroll back up, and use the blue tabs at the top to navigate to the next section.

Share

You have not yet shared this review.  
After answering one question, a button will appear allowing you to share answers with other participants.

Share

Save And Close

Your changes won't be shared when leaving the review.

save and close

Introduction

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Summary

Previous Objectives

Please completed based on your most recent PDR/Probation review. For guidance on how to do this, please refer to the Step-by-Step Simlitive PDR Guide.

Objectives set at the previous Probation/PDR Meeting *	Achieved *	Timescale/Deadline *	Details of how achieved and if not fully, contributing factors *
test	Yes	30/04/2023	test

Add

4. Under the 'Taking Stock' tab, add your comments to the red boxes under 'Your Performance'

Share

You have not yet shared this review.  
After answering one question, a button will appear allowing you to share answers with other participants.

Share

Save And Close

Your changes won't be shared when leaving the review.

save and close

Your Performance

What has gone well over the last 12 months? \*

View History

Reviewer's Comments \*

Reviewer(s) to complete

What could have gone better and why? \*

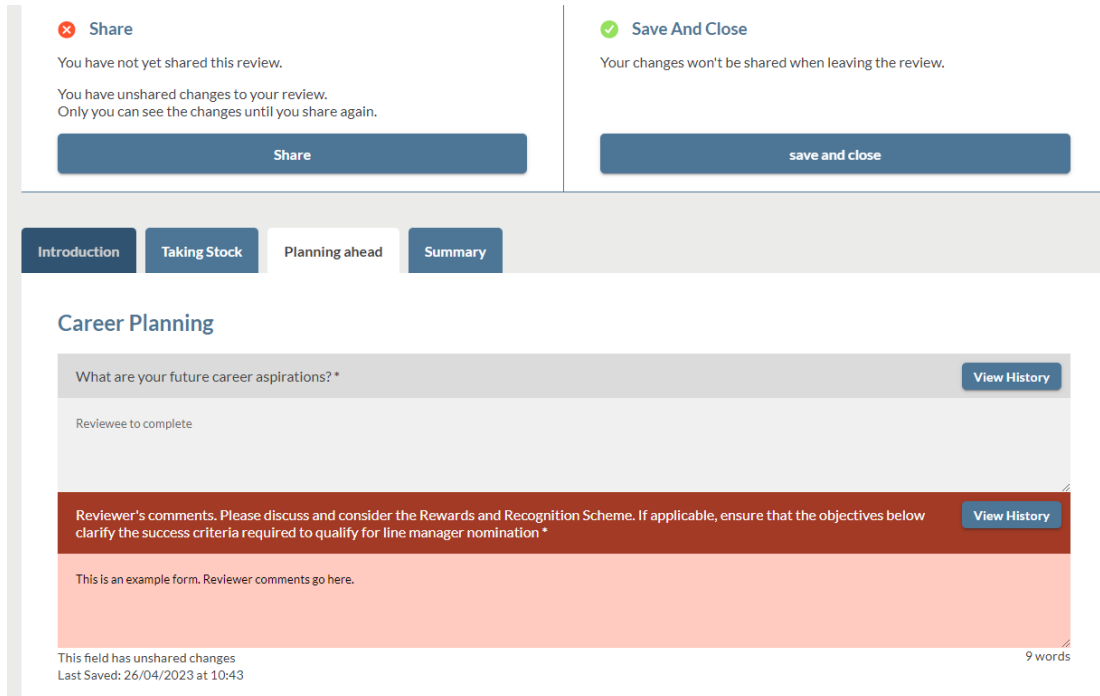
View History

Reviewer's Comments \*

Reviewer(s) to complete



5. Under the 'Planning Ahead Tab', add your comments under the 'Career Planning' section.



**Share**

You have not yet shared this review.

You have unshared changes to your review.  
Only you can see the changes until you share again.

**Share**

**Save And Close**

Your changes won't be shared when leaving the review.

**save and close**

**Introduction** **Taking Stock** **Planning ahead** **Summary**

**Career Planning**

What are your future career aspirations? \*

Reviewee to complete

**View History**

Reviewer's comments. Please discuss and consider the Rewards and Recognition Scheme. If applicable, ensure that the objectives below clarify the success criteria required to qualify for line manager nomination \*

**View History**

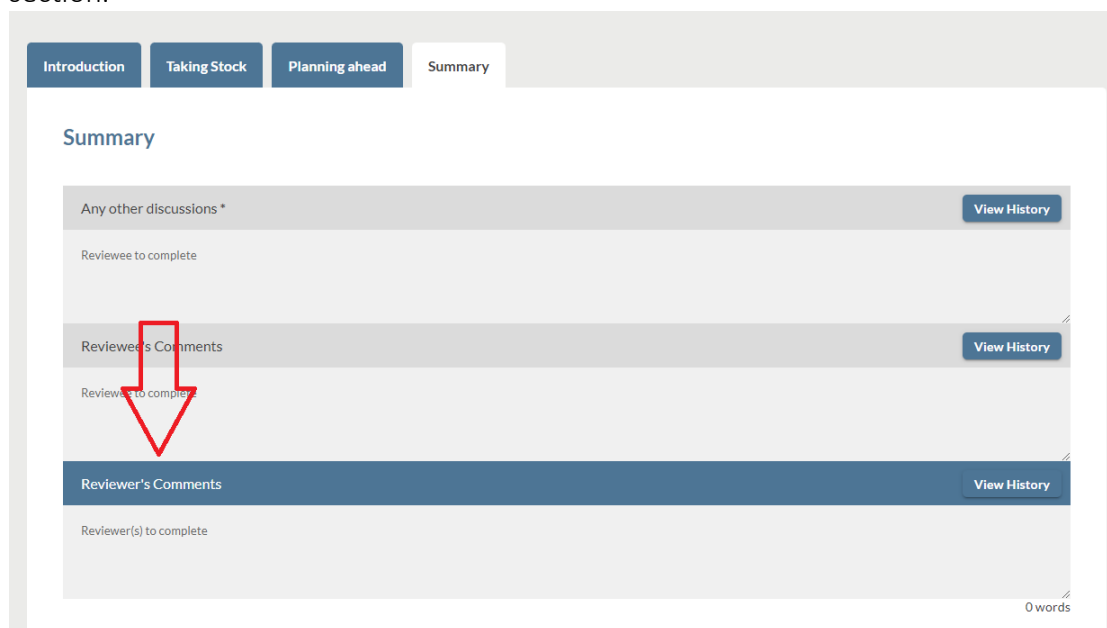
This is an example form. Reviewer comments go here.

This field has unshared changes  
Last Saved: 26/04/2023 at 10:43

9 words

6. Click 'save and close' in the top banner (pictured in the previous image) to save your progress at any time and close the form, should you need to stop and return to the task later. To re-open the form, follow the steps outlined in 5.2 above.

7. Under the 'Summary tab', add your concluding comments to the 'Reviewer's Comments' section.



**Introduction** **Taking Stock** **Planning ahead** **Summary**

**Summary**

Any other discussions \*

Reviewee to complete

**View History**

Reviewer's Comments

Reviewee to complete

**View History**

Reviewer's Comments

**View History**

Reviewer(s) to complete

0 words

8. When you are happy with your comments, and ready to share the updated form with the reviewee, scroll up to the top banner, and click 'Share'

PDR 2023 - 2024

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Finalisation open from:  
-

Completion deadline:  
-

Status:  
**Shared By Reviewee (Unshared Changes)**

---

<div> <div>✖ Meeting Date</div> <div>Set a meeting date to discuss and agree this review.</div> <div> <div>Set</div> <div>Skip</div> </div> </div>	<div> <div>✔ Reviewers</div> <div>1. (default)</div> <div>Reviewer History</div> <div>Add</div> </div>
<div> <div>✖ Share</div> <div>You have not yet shared this review.</div> <div>You have unshared changes to your review. Only you can see the changes until you share again.</div> <div>Share</div> </div>	<div> <div>✔ Save And Close</div> <div>Your changes won't be shared when leaving the review.</div> <div>save and close</div> </div>

---

✓

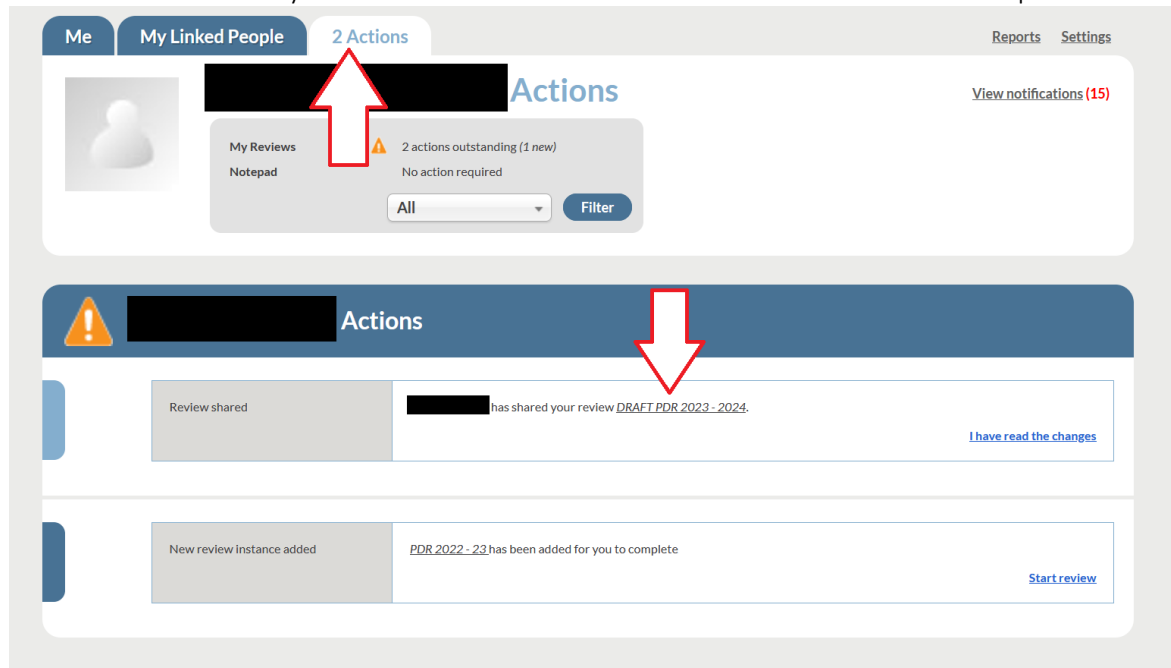
Options, Attachments & Printable PDF

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## 6. Reviewee Reviews and Finalises the Form

1. You should open your Simitive account here: <https://paediatricspdr.simitive.com/>. Log in with your SSO.

2. In the top menu, please click on the 'Actions' tab. This will show that your reviewer has shared the form with you. You then need to click on the name of the form to open it.



3. Review the comments that your reviewer has added.

4. Now that all parts have been completed, you can finalise the form. Please note that if you have not completed all mandatory fields (those marked in red), it will not let you finalise the form. If you need to make any amendments, do so, and then click the 'Save and Close' button to ensure these are saved to the form, as in Step 2.10.

5. Once all mandatory sections are completed, the 'Finalisation' box will appear. To finalise the form, click the tick box which has your name next to it, to indicate you agree to the finalisation of the review form. Please note, once finalised it is not possible to make further changes to the form.

PDR 2023 - 2024

Finalisation open from:

Completion deadline:

Status:

-

-

To Be Finalised By The Reviewer

Meeting Date

The meeting date has been set for 08/05/2023.

Change

History

Download Calendar File

Reviewers

1. (default)

Reviewer History

Add

Share

You last shared on 26/04/2023 at 11:16.

Shared with reviewer. You can still make changes, but they will also need to be shared.

Save And Close

Your changes won't be shared when leaving the review.

save and close

Options, Attachments & Printable PDF

Mandatory fields

All mandatory fields are indicated by a \* symbol. They must be filled out before the review can be finalised.

ON Highlight mandatory review questions

Generate Printable PDF

Add Attachment

View & Manage Attachments

Keyboard Shortcuts

Finalisation

Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to finalise it.

This review will complete automatically once all parties have submitted for finalisation.

View History

☐ I agree to the finalisation of this review

☐ I agree to the finalisation of this review

6. A pop-up box will appear, asking you to confirm you agree to the finalisation. If you are happy with this, click 'Submit for Finalisation' to share it with your line manager for them to finalise

Are You Sure?

X

Once a review has been submitted for finalisation it can no longer be edited, unless the other review user(s) decline finalisation.

Your reviewers will be notified that you wish to finalise this review..

This review will complete automatically once all parties have submitted for finalisation.

Cancel

Submit for Finalisation

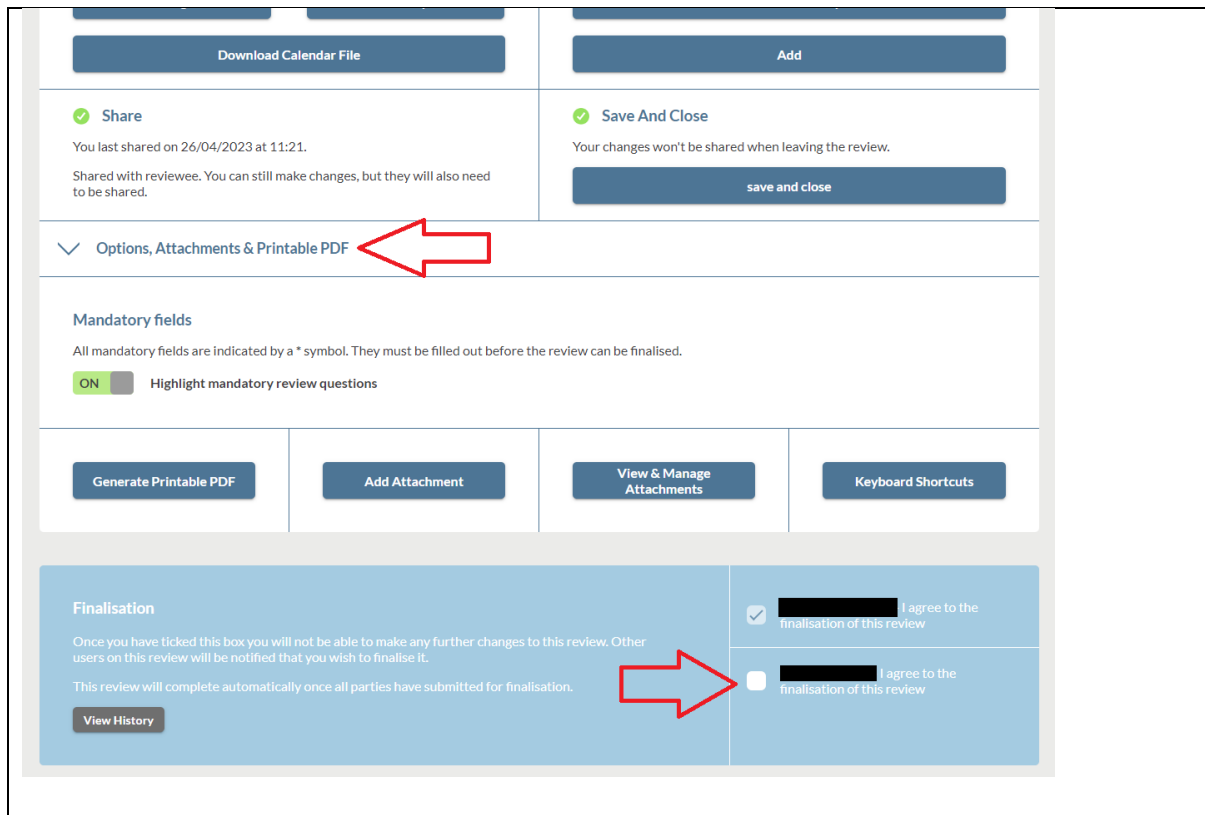
## 7. Reviewer Finalises the Form

1. You should open your Simitive account here: <https://paediatricspdr.simitive.com/>. Log in with your SSO.

2. Navigate to the form. Click the 'Actions' tab, and you should see a notification that your reviewee has shared the form with you for finalisation, as below. Click 'Go to Review' to review the form to be sure you are happy with this before finalising. Should you wish to skip this step, you can click on 'Approve' to finalise the form.

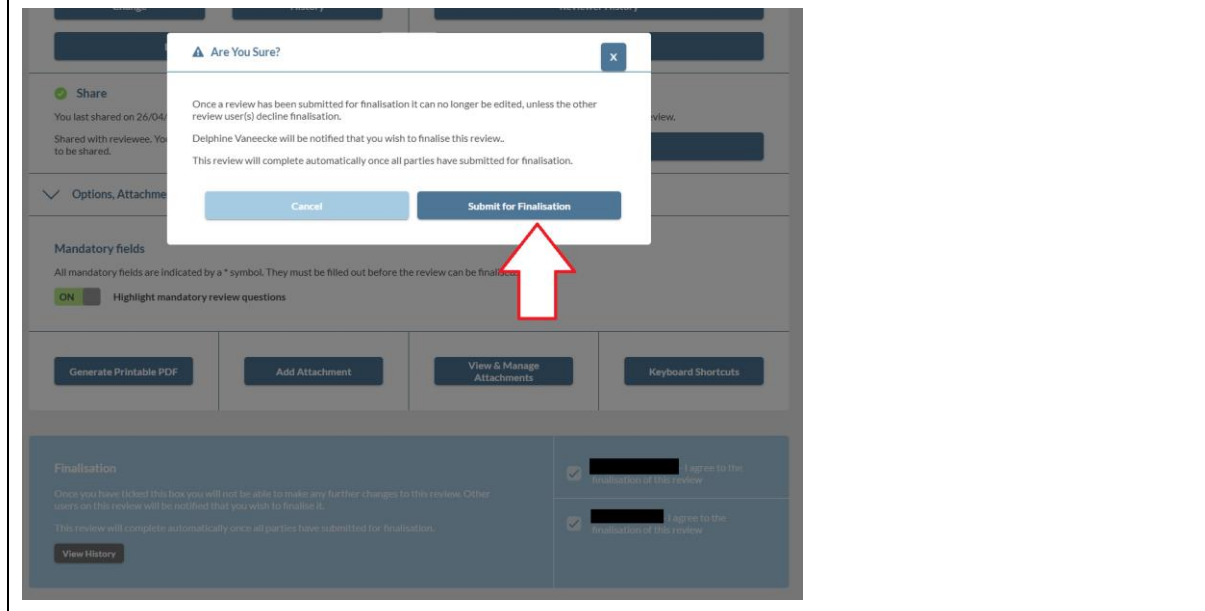


3. After reviewing the form, in the top banner, under 'options' go to the 'Finalisation' section and tick the tickbox that should have your name next to it to finalise.



The screenshot shows a web interface for a review form. At the top, there are buttons for 'Download Calendar File' and 'Add'. Below these are two sections: 'Share' and 'Save And Close'. The 'Share' section indicates the last share time and that changes need to be shared. The 'Save And Close' section states that changes won't be shared and includes a 'save and close' button. A red arrow points to the 'Options, Attachments & Printable PDF' section, which is expanded. This section contains a 'Mandatory fields' note and a toggle for 'Highlight mandatory review questions' (currently ON). Below this are four buttons: 'Generate Printable PDF', 'Add Attachment', 'View & Manage Attachments', and 'Keyboard Shortcuts'. At the bottom, there is a 'Finalisation' section. It contains a 'View History' button and two checkboxes for agreement to finalisation, both of which are checked. A red arrow points to the second checkbox.

4. A pop up box will appear asking you to confirm you want to finalise the form. Once finalised, no further amendments can be made. Click 'Submit for Finalisation' to finalise.



This screenshot shows the same review form interface as the previous one, but with a confirmation pop-up box overlaid. The pop-up box is titled 'Are You Sure?' and contains the following text: 'Once a review has been submitted for finalisation it can no longer be edited, unless the other review user(s) decline finalisation. Delphine Vanecke will be notified that you wish to finalise this review. This review will complete automatically once all parties have submitted for finalisation.' At the bottom of the pop-up are two buttons: 'Cancel' and 'Submit for Finalisation'. A red arrow points to the 'Submit for Finalisation' button. The background form is dimmed, showing the 'Share', 'Options, Attachments & Printable PDF', 'Mandatory fields', and 'Finalisation' sections.

5. You will now be able to view the finalised form. Navigate to the 'My Linked People' tab, and the status should show as in green as 'Completed'. Should you wish to review the form, click 'View Review' in the right-hand column.

Me
My Linked People
2 Actions
Review Settings
Review Reports

### My Linked People

Reviewer

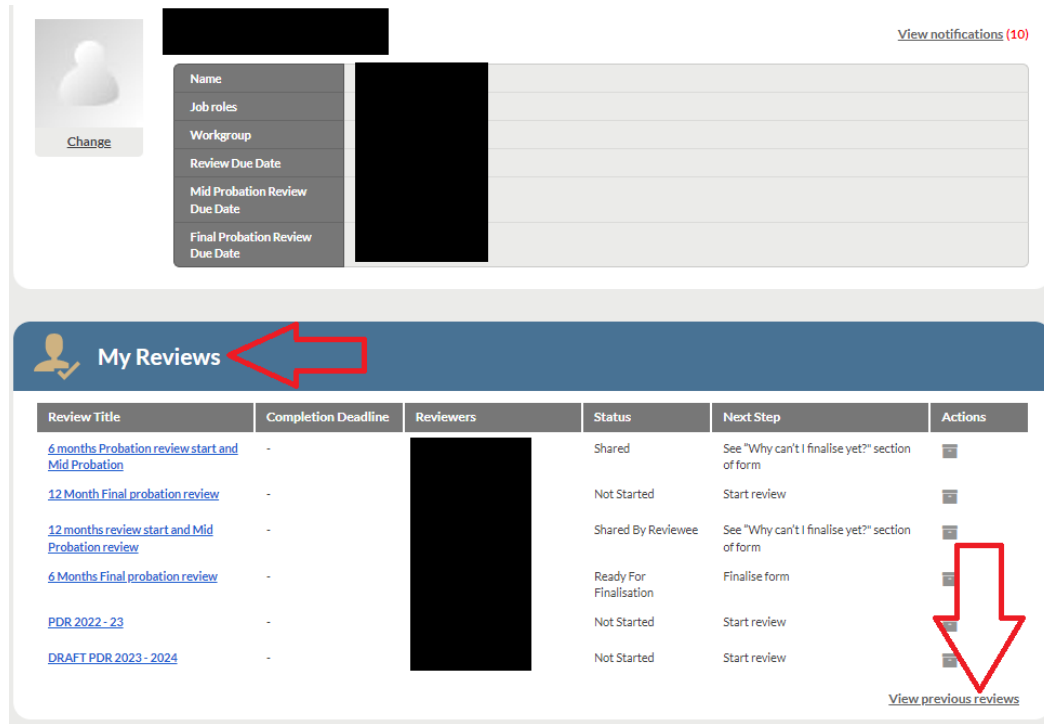
> Filters

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Name Last	Job Role	Workgroup	Review	Review Status	Next Step	My Actions
	Administrative team		6 months Probation review start and Mid Probation	Started	Share review	View Profile View Review
	Administrative team		12 Month Final probation review	Not Started	Start review	View Profile View Review
	Administrative team		12 months review start and Mid Probation review	Not Started	Start review	View Profile View Review
	Administrative team		6 Months Final probation review	Not Started	Start review	View Profile View Review
	Administrative team		DRAFT PDR 2023 - 2024	Completed		View Profile View Review

## 8. Reviewee Views Finalised Form

1. Once your line manager has also finalised the form, it will disappear from your current forms area. You will need to navigate to 'My Reviews' and click on 'view finalised reviews' to access the finalised form.

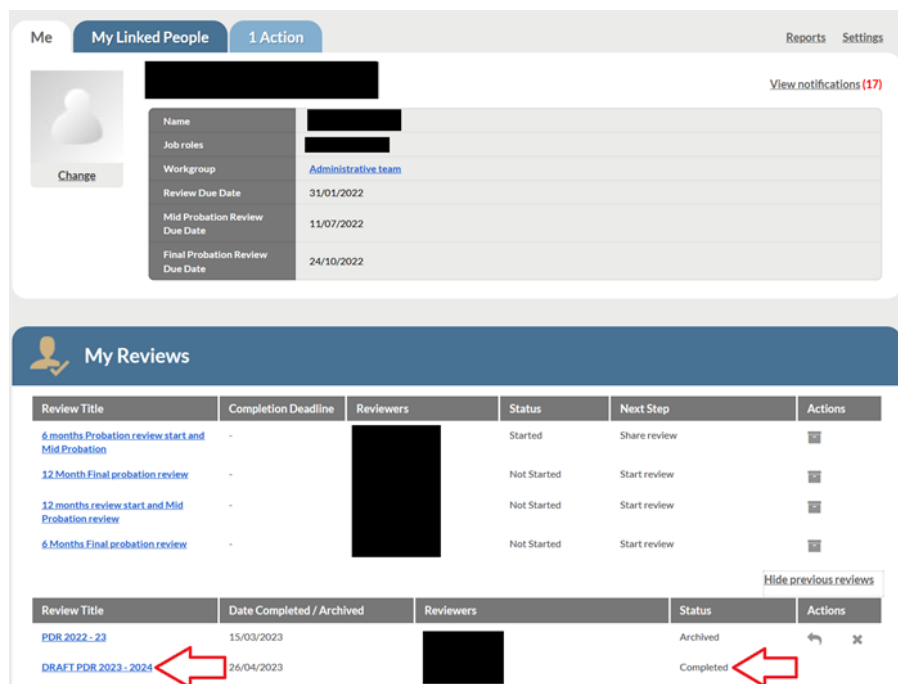


[View notifications \(10\)](#)

Review Title	Completion Deadline	Reviewers	Status	Next Step	Actions
<a href="#">6 months Probation review start and Mid Probation</a>	-		Shared	See "Why can't I finalise yet?" section of form	
<a href="#">12 Month Final probation review</a>	-		Not Started	Start review	
<a href="#">12 months review start and Mid Probation review</a>	-		Shared By Reviewee	See "Why can't I finalise yet?" section of form	
<a href="#">6 Months Final probation review</a>	-		Ready For Finalisation	Finalise form	
<a href="#">PDR 2022 - 23</a>	-		Not Started	Start review	
<a href="#">DRAFT PDR 2023 - 2024</a>	-		Not Started	Start review	

[View previous reviews](#)

2. A finalised review form will look like the below, with the status showing as 'completed':



[View notifications \(17\)](#)

Review Title	Completion Deadline	Reviewers	Status	Next Step	Actions
<a href="#">6 months Probation review start and Mid Probation</a>	-		Started	Share review	
<a href="#">12 Month Final probation review</a>	-		Not Started	Start review	
<a href="#">12 months review start and Mid Probation review</a>	-		Not Started	Start review	
<a href="#">6 Months Final probation review</a>	-		Not Started	Start review	

[Hide previous reviews](#)

Review Title	Date Completed / Archived	Reviewers	Status	Actions
<a href="#">PDR 2022 - 23</a>	15/03/2023		Archived	
<a href="#">DRAFT PDR 2023 - 2024</a>	26/04/2023		Completed	



