Managers Guide: Where and how to record a Staff Review and Development Scheme (SRDS) meeting has taken place

Following the SRDS meeting, the date that the SRDS took place should be recorded in 'myTeam' against the individual’s name. SRDS completions are recorded in 'myTeam' so that completion rates can be reported on at a Department, Faculty or University level. If you have a SRDS Co-ordinator in your Department you may be able to send the signed SRDS form so that they can record the completion within MyTeam on your behalf. Please check local arrangements and deadlines within your Department/Faculty.

1. Click on ‘SRDS Tracking’ link within ‘myTeam’:

2. A list of all the staff that you have access to will become visible, including both your direct reports and their subordinates.

3. Select the review year that the SRDS meeting took place in (the current year):

4. If you wish to only see your direct reports then click on line manager and click on your name, this will filter on your direct reports. Or if you only wish to see those staff reporting into a manager within your team, then click on that manager's name:

   Note: If the individual has a 'locked' symbol next to their name, this indicates that another user is editing their record.
5. Click within the ‘Review Date’ cell against the member of staff’s name and enter/select the date that the SRDS meeting took place. This is a mandatory field and the date you enter must be within the current year that you have selected:

Note:
- If you leave the date blank, this will be reported that no SRDS has taken place
- If there is a genuine reason why the SRDS did not take place (e.g. the individual was on long-term sick), you can enter a note in the notes field next to the individual’s name and input a default date as described below.

6. The notes field is an optional field. You may wish to enter a note if there is a genuine reason why the SRDS could not take place (please refer to the SRDS webpages for further guidance) or to indicate if someone else undertook the review for example. In order to enter a note against the individual’s name you need to first enter a date. If a SRDS has not taken place, and you wish to explain why then please use the default date of 1 January for the current year e.g. 01/01/2017.

7. When you have entered the information against the individual’s name, click on ‘Save’ in the top left of the screen.

8. If you wish to report on the data, then click on ‘Export’ and follow the steps to transfer the data into ‘Excel’.

What happens next?
SRDS completion rate data for your Department/Faculty will be monitored and reported on each year.

Further guidance and information:
https://www.sheffield.ac.uk/hr/guidance/srds