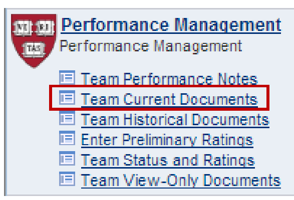
This **Quick Start** provides basic instruction completing your employee's **Annual Review** in PeopleSoft.

General Process Flow between You and Your Employee

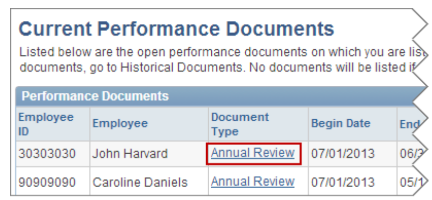
	Your Employee…		You…
1	• Nominates reviewers to provide feedback on his/her performance	2	• Submit requests to reviewers to provide feedback on your employee's performance
3	• Completes the **Self-Evaluation Document**.	4	• Review the **Self Evaluation Document** and any additional feedback from other reviewers. • Enter comments into the **Manager's Document**. • Share the **Manager's Document** with your employee. *Note: You may share the document before you meet or during your one-on-one meeting.*
5	• Reviews the **Manager's Document** and edits your comments, if applicable. • Meets with you to review the **Manager's Document**.	6	• Meet with your employee, then enter additional comments. • Mark the **Manager's Document** to confirm that you met.
7	• Acknowledges the **Manager's Document**.	8	• Set the **Manager's Document** to Complete. The Document becomes view-only.

Step 1 – Submit Reviewers for Feedback, Track Reviewer and Employee Evaluation(s)

1. Click Team Current Documents in the *Quick Links – Manager Service menu.*

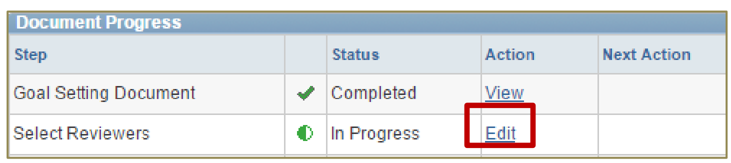


2. In the *Current Performance Documents* page, click Annual Review.



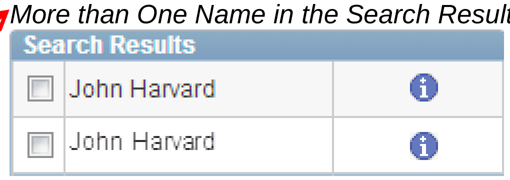
3. Click Edit next to *Select Reviewers* to nominate 4 types of reviewers: Direct Reports (if your employee is a people manager), Peers/Colleagues, Additional Direct Supervisors, or Faculty Feedback.

Note: Your employee can recommend reviewers, but you must submit the request(s).



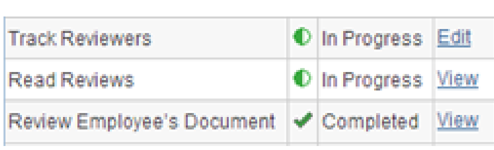
4. To add, delete, and submit reviewer requests:
   - *Add a request:* Click + Enter the **Last Name** and **First Name** in the Search Criteria, then click Search.
   - *Delete a request:* Click next to the person's name
   - When you are ready to submit all your reviewer requests, click Save and Submit.

More than One Name in the Search Results?



Click next to a name to review the employee's department and office location to help determine which employee to select.

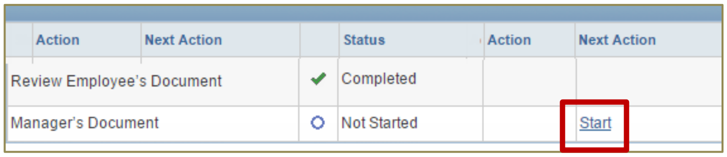
The reviewers receive an email request for feedback.



To track or cancel a request.
To read a review.
To read your employee's self-evaluation.

Step 2 – Enter Ratings and Comments into the Manager's Document

1. From the Document Details page, click Start next to *Manager's Document*.



2. Provide comments and ratings (where required) on each of the following:
   a. **Job and Performance Goals**
   b. **Professional Growth and Development Goals**
   c. **Core Competencies**
   d. **Additional Competencies**
   e. **Feedback From Others**
   f. **Feedback from Direct Reports, Part I**
   g. **Feedback from Direct Reports, Part II**

Helpful links and buttons:

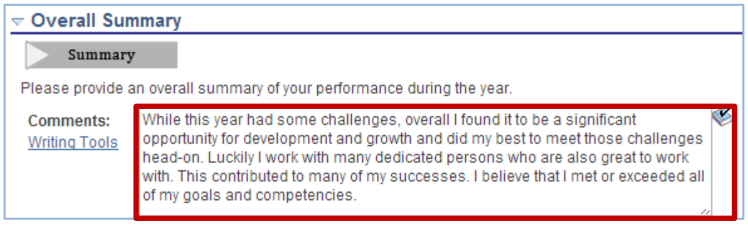
- Review the rating definitions.

View Other Comments - Review comments and ratings by other reviewers and the employee

Writing Tools - Include your notes, or summarize comments written by other reviewers.

- Spell-check a section.

3. Add your summary comments to the **Overall Summary** section.
4. Click Save to save edits.
5. When finished, click Share With Employee, then OK to confirm.

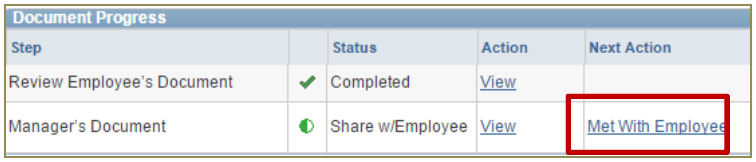


Your employee receives an email that the evaluation is ready for review.

Note: Click Share With Employee after you meet with the employee if you want to have a conversation before sharing the review.

Step 3 – Meet with Employee

1. Meet with the employee to discuss the review. From the Document Details page, click Met With Employee next to *Manager's Document*.

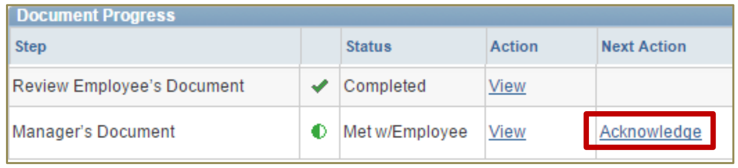


2. Confirm that you met with the employee. Click Met With Employee on the document, then OK.

Your employee receives an email request to acknowledge the document. If the employee cannot or will not acknowledge, you can acknowledge it.

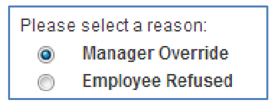
Step 4 - Acknowledge the Document for the Employee (if necessary)

1. From the Document Details page, click Acknowledge next to *Manager's Document*.

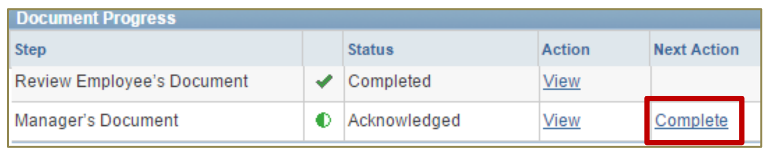


2. Click Acknowledge Review at the top or bottom of the document, then OK to confirm.

3. Click a radio button to select a either *Manager Override* or *Employee Refused*, then click OK to confirm.



Step 4 – Mark the Document as Complete



1. From the Document Details page, click Complete next to *Manager's Document*.
2. Review the **Employee Comments** section for additional detail. Enter your final comments in the **Manager Comments** section.
3. Click Complete at the top or bottom of the document then OK and OK again to confirm.

4. To access another employee's document, click Return to Select Documents from the Document Details page**.**

At any step before completing the review, you can reopen the Manager's Document to the Share with Employee status by clicking Reopen at the bottom of the document.

Need More Help?

- Review the detailed work instruction: **Manager: Completing the Annual Review**.
- Take the online course: **Manager: Completing the Annual Review.**

If you still have questions after reviewing the additional information, contact your local HR office.