This **Quick Start** provides basic instructions completing your employee’s **Annual Review** in PeopleSoft.

### General Process Flow between You and Your Employee

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

### 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**.

   **The reviewers receive an email request for feedback.**

   **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.**

   **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

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 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 **Reject** 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.