

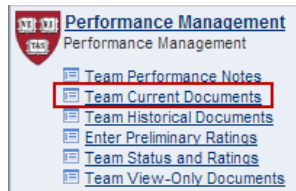
This **Quick Start** provides basic instruction completing your employee's **Annual Review** in PeopleSoft.

General Process Flow between You and Your Employee

Your Employee...	You...
1 <ul style="list-style-type: none"> Nominates reviewers to provide feedback on his/her performance 	2 <ul style="list-style-type: none"> Submit requests to reviewers to provide feedback on your employee's performance
3 <ul style="list-style-type: none"> Completes the Self-Evaluation Document. 	4 <ul style="list-style-type: none"> 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. <p><i>Note: You may share the document before you meet or during your one-on-one meeting.</i></p>
5 <ul style="list-style-type: none"> Reviews the Manager's Document and edits your comments, if applicable. Meets with you to review the Manager's Document. 	6 <ul style="list-style-type: none"> Meet with your employee, then enter additional comments. Mark the Manager's Document to confirm that you met.
7 <ul style="list-style-type: none"> Acknowledges the Manager's Document. 	8 <ul style="list-style-type: none"> Set the Manager's Document to Complete. The Document becomes view-only.

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

- Click [Team Current Documents](#) in the *Quick Links – Manager Service menu*.



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

Current Performance Documents
Listed below are the open performance documents on which you are listed as a reviewer. To view or edit documents, go to Historical Documents. No documents will be listed if you are not a reviewer.

Employee ID	Employee	Document Type	Begin Date	End Date
30303030	John Harvard	Annual Review	07/01/2013	06/30/2014
90909090	Caroline Daniels	Annual Review	07/01/2013	05/31/2014

- 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.

Step	Status	Action	Next Action
Goal Setting Document	✓ Completed	View	
Select Reviewers	🔄 In Progress	Edit	

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

- 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?

Search Results

<input type="checkbox"/>	John Harvard	i
<input type="checkbox"/>	John Harvard	i

Click [i](#) 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.

Track Reviewers	🔄 In Progress	Edit	←
Read Reviews	🔄 In Progress	View	←
Review Employee's Document	✓ Completed	View	←

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

- From the Document Details page, click [Start](#) next to *Manager’s Document*.

Action	Next Action	Status	Action	Next Action
Review Employee’s Document		✓ Completed		
Manager’s Document		○ Not Started		Start

- Provide comments and ratings (where required) on each of the following:
 - Job and Performance Goals**
 - Professional Growth and Development Goals**
 - Core Competencies**
 - Additional Competencies**
 - Feedback From Others**
 - Feedback from Direct Reports, Part I**
 - 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.

- Add your summary comments to the **Overall Summary** section.
- Click [Save](#) to save edits.
- When finished, click [Share With Employee](#), then [OK](#) to confirm.

Overall Summary

Summary

Please provide an overall summary of your performance during the year.

Comments: [Writing Tools](#)

While this year had some challenges, overall I found it to be a significant opportunity for development and growth and did my best to meet those challenges head-on. Luckily I work with many dedicated persons who are also great to work with. This contributed to many of my successes. I believe that I met or exceeded all of my goals and competencies.

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

- Meet with the employee to discuss the review. From the Document Details page, click [Met With Employee](#) next to *Manager’s Document*.

Document Progress			
Step	Status	Action	Next Action
Review Employee’s Document	✓ Completed	View	
Manager’s Document	🟡 Share w/Employee	View	Met With Employee

- Confirm that you met with the employee. Click [Met With Employee](#) on the document, then [OK](#).

[Save](#)
[Met With Employee](#)

[Return to Document Detail](#)

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)

- From the Document Details page, click [Acknowledge](#) next to *Manager's Document*.
- Click at the top or bottom of the document, then to confirm.
- Click a radio button to select either *Manager Override* or *Employee Refused*, then click to confirm.

Document Progress			
Step	Status	Action	Next Action
Review Employee's Document	✓ Completed	View	
Manager's Document	🕒 Met w/Employee	View	Acknowledge

[Return to Document Detail](#)

Please select a reason:

Manager Override
 Employee Refused

Step 4 – Mark the Document as Complete

- From the Document Details page, click [Complete](#) next to *Manager's Document*.
- Review the **Employee Comments** section for additional detail. Enter your final comments in the **Manager Comments** section.
- Click at the top or bottom of the document then and again to confirm.
- To access another employee's document, click [Return to Select Documents](#) from the Document Details page.

Document Progress			
Step	Status	Action	Next Action
Review Employee's Document	✓ Completed	View	
Manager's Document	🕒 Acknowledged	View	Complete

[Return to Document Detail](#)

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