

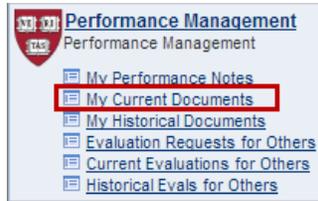
# Performance Management

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

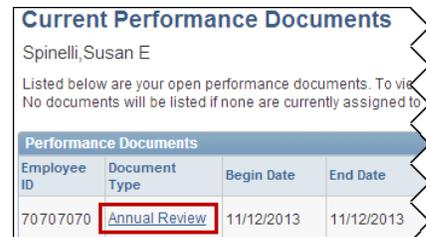
	You...		Your Manager...
<b>1</b>	<ul style="list-style-type: none"> <li>Recommend reviewers to provide feedback on your performance</li> </ul>	<b>2</b>	<ul style="list-style-type: none"> <li>Submits requests to reviewers to provide feedback on your performance</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>Complete the <b>Self-Evaluation Document</b>.</li> </ul>	<b>4</b>	<ul style="list-style-type: none"> <li>Reviews your <b>Self Evaluation Document</b> and any additional feedback from other reviewers.</li> <li>Enters comments into the <b>Manager's Document</b>.</li> <li>Shares the <b>Manager's Document</b> with you. <i>Note: Your manager may share the document before you meet or during your one-on-one meeting.</i></li> </ul>
<b>5</b>	<ul style="list-style-type: none"> <li>Review the <b>Manager's Document</b> and edit your comments, if applicable.</li> <li>Meet with your manager to review the <b>Manager's Document</b>.</li> </ul>	<b>6</b>	<ul style="list-style-type: none"> <li>Meets with you, then may enter additional comments.</li> <li>Marks the <b>Manager's Document</b> to confirm that you have met.</li> </ul>
<b>7</b>	<ul style="list-style-type: none"> <li>Acknowledge the <b>Manager's Document</b>.</li> </ul>	<b>8</b>	<ul style="list-style-type: none"> <li>Sets the <b>Manager's Document</b> to Complete. The Document becomes view-only.</li> </ul>

## Step 1: Recommend Reviewers to Provide Feedback

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



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



- Click [Start](#) next to *Select Reviewers* to recommend 4 types of reviewers: Direct Reports (if you are a manager), Peers/Colleagues, Additional Direct Supervisors, and Faculty

**Note:** You can only recommend reviewers. Your manager will submit the review request(s).

Document Progress			
Step	Status	Action	Next Action
Goal Setting Document	✓ Completed	<a href="#">View</a>	
Select Reviewers	○ Not Started		<b>Start</b>
My Self Evaluation Document	○ Not Started		<a href="#">Start</a>
Review Manager's Document	○ Not Started		

- For each reviewer request:
  - Click  , enter the **Last Name** and **First Name** in the Search Criteria, then click  .
  - When you finished entering all reviewers, click  .

*More than One Name in the Search Results?*

Search Results	
<input type="checkbox"/> John Harvard	<a href="#">i</a>
<input type="checkbox"/> John Harvard	<a href="#">i</a>

Click [i](#) next to a name to review the employee's department and office location to help determine which employee to select.

## Step 2: Complete Your Self-Assessment

- From the Document Details page, click [Start](#) next to *My Self Evaluation Document*.

Document Progress			
Step	Status	Action	Next Action
Goal Setting Document	✓ Completed	<a href="#">View</a>	
Select Reviewers	🟢 In Progress	<a href="#">Edit</a>	
My Self Evaluation Document	🟡 Not Started		<a href="#">Start</a>
Review Manager's Document	🟡 Not Started		

- Provide comments and ratings (if applicable) on each of the following:
  - Job and Performance Goals**
  - Professional Growth and Development Goals**
  - Core Competencies**
  - Additional Competencies**

### Helpful links and buttons:

- Click to review the rating definitions.
- [Writing Tools](#) Click to include any notes you added in the **Performance Notes** page.
- Click to spell-check a section.

- Add your summary comments to the **Overall Summary** section.
- Click  at the top or bottom of the document.
- When finished, click . Click  again, then .

*An e-mail is sent informing your manager your self-evaluation is ready for review.*

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.

## Step 3: Review the Manager's Document

- From the Document Details page, click [View](#) next to *Review Manager's Document*.
- Review the **Manager's Document**.

Document Progress			
Step	Status	Action	Next Action
Review Manager's Document	🟢 Share w/Employee	<a href="#">View</a>	

- Edit the **Employee Comments**, if applicable.
- Click , then notify your manager that you are ready to meet.

Employee Comments

Summary Comments

Employee's comments before completing the evaluation.  
If you completed a self-evaluation before your manager shared this document, then your self-evaluation summary is automatically displayed here and you can edit it until your manager

Comments: [Writing Tools](#)

I believe that I met all of my goals for the year and am proficient in all of my competencies. This year had many challenges as well as opportunities to learn more about different functions in the school from an accounting

## Performance Management

**Step 4: Meet with Your Manager**

1. Meet with your manager to review the **Manager's Document**.
2. Your manager will mark the document to confirm that you have met.

**Step 5: Acknowledge the Manager's Document** *(You will receive an email request to acknowledge it.)*

1. From the Document Details page, click [View](#) or [Acknowledge](#) next to *Review Manager's Document*

Document Progress			
Step	Status	Action	Next Action
Review Manager's Document	Met w/Employee	<a href="#">View</a>	<a href="#">Acknowledge</a>

2. Review and edit the **Employee Comments**, if applicable.

3. Click [Acknowledge Review](#) at the top or bottom of the document, then [OK](#).

<a href="#">Save</a>	<a href="#">Acknowledge Review</a>		<a href="#">Return to Document Detail</a>
----------------------	------------------------------------	---	---

Your manager will mark the document as complete. *Your will receive an email notification.* You can view your completed documents by navigating to [Quick Links>Performance Management>My Historical Documents](#) folder in Self Service.

**Need More Help?**

- Review the detailed work instruction: [Employee: Completing Your Annual Review](#).
- Take the online course: [Employee: Completing Your Annual Review](#).

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