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

<table>
<thead>
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<th>Your Employee…</th>
<th>You…</th>
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| 1. Nominates reviewers to provide feedback on his/her performance | 2. *(if checkpoint is used)* Click **Complete** in **Finalize Goals**, even if the checkpoint was skipped.  
Submit requests to reviewers to provide feedback on your employee’s performance. |
| 3. Completes the **Self-Evaluation**. | 4. Review the **Self Evaluation Document** and any additional feedback from other reviewers.  
Enter comments into the **Manager’s Evaluation**.  
Share the evaluation with your employee either before or during your one-on-one meeting. |
| 5. Reviews the **Manager’s Evaluation** and provides comments, if applicable.  
Meets with you to review the evaluation. | 6. Meet with your employee, then enter additional comments, if applicable. |
| 7. Acknowledges the **Manager’s Evaluation**. | 8. |

### Submit Reviewers for Feedback, Track Reviewer and Employee Evaluation(s)

1. Click the **Team Performance** tile from the PeopleSoft home page.

2. Click on the document you want to access.

3. Click **Select Reviewers**, then **Add Reviewers** (on the left).

4. To add a reviewer request:
   - Click **+** , enter the **Last Name** and **First Name** in the Search Criteria, then click **Search**.
   - If there is more than one name in the search results, click **next** to the name to review the employee’s information to determine which person to select.

5. To remove a request your employee has suggested, click

6. When you finished entering all reviewers, click **Submit Reviewers**.

7. *(optional)* Click **Track Reviewers** to monitor if the reviewers have accepted or denied the review request.

### Enter Rating and Comments into the Manager’s Document

1. From the document, click **Update and Share**. The Manager’s evaluation will include all feedback submitted by your employee and any reviewers for each section. *This feedback will only display to the employee if you choose to include it in your comments.*

2. *(optional)* Add attachments by clicking **Add Attachment** at the bottom of the document. You can indicate each attachment as sharable with Employee and Manager or just Manager.

3. Review the following:

<table>
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<th><strong>Goals tab</strong></th>
<th><strong>Competencies tab</strong></th>
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   | Job and Performance Goals  
Professional Growth and Development Goals | Core Competencies  
Additional Competencies |
4. On the Feedback tab, click Expand to review and add comments for:
   - Feedback from Peers/Colleagues
     Review any feedback submitted from the Peer/Colleague review(s) and enter a summary in the Manager Comments section. The employee can only access the comments you add under Manager Comments.
   - Feedback From Direct Reports, Part I (only if your employee is a supervisor)
     Click on the Manager’s Effectiveness Evaluation to expand, then click Participant Ratings associated with each question to view the ratings given by your employee’s direct reports. The Participant Feedback rating appears directly below the Managers Effectiveness Evaluation. The employee cannot access any of the ratings.
   - Feedback From Direct Reports, Part II (only if your employee is a supervisor)
     Review any feedback submitted from the employee’s direct reports and enter a summary in the Manager Comments section. The employee can only access the comments you add under Manager Comments.

5. On the Summary tab, provide an overall rating and comments in the Overall Summary section. The employee comments will display in the Employee Comments section, but other feedback will not display unless you add it to the Manager Comments.

6. Click Save to save edits. When finished, click Share with Employee, then Confirm.

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

Meet with Employee
Click Share with Employee after you meet with the employee if you want to have a conversation before sharing the review. The employee will acknowledge the review, which completes the process.

(If necessary) Acknowledge the Document for the Employee
In some cases, the employee is unable to acknowledge the document (on leave, etc.), so the manager can do an acknowledgement override.

1. Select the employee’s document.
2. Click Pending Acknowledgement under the Manager’s Evaluation.
3. Click Override Acknowledgement in the top-right of the page (by the Save button).
4. Select an override reason: “Employee Not Available” or “Employee Refused.”
5. Click Confirm.
6. The process is now complete and the document has moved to the Historical Documents page.

Need More Help? Review the detailed work instruction: Manager: Completing the Annual Review, or contact your local HR office.