This **Quick Start** provides basic instruction on performance management in PeopleSoft for this step:

**General Mid-Year Review Process between You and Your Manager**

<table>
<thead>
<tr>
<th>You...</th>
<th>Manager...</th>
</tr>
</thead>
</table>
Enters comments into the Manager’s Document.  
Shares the Manager’s Document with you.  
*Note: Your manager may share the document before you meet or during your one-on-one meeting.* |
| 3. Review the Manager’s Document and edit your comments, if applicable.  
Meet with your manager to review the Manager’s Document. | 4. Meets with you, then may enter additional comments.  
Marks the Manager’s Document to confirm that you have met. |
| 5. Acknowledge the Manager’s Document. | 6. Sets the Manager’s Document to complete.  
The Document becomes view-only. |

**Step 1: Complete the Self Evaluation Document**

1. Click **My Current Documents** in the Quick Links – Self Service menu.
2. In the **Current Performance Documents** page, click **Mid Year Review**.

To view your Goal Setting Document, click **Annual Review**, then click the View link.

3. Click **Start**, or **Edit** or **Complete** (if the document is already “In Progress”) to open.
4. Add comments to the **Overall Summary** section.
5. Click **Save** at the top or bottom of the document. (This is very important to avoid losing data.)
6. When finished, click **Complete**. Click **Complete** again, then **OK** to confirm the action.

Your manager will receive a system-generated notification.
Step 2: Review the Manager’s Document

1. Navigate to the Manager’s Document via Quick Links - My Current Documents>Document Details>Mid-Year Review. Click View.

2. Review the Manager’s Document.

3. Edit the Employee Comments, if applicable.

4. Click Save at the top or bottom of the Manager’s Document.

5. Notify your manager that you have reviewed the document and are ready to meet.

Step 3: 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 4: Acknowledge the Manager Document

You receive an email request to acknowledge the document.


2. Click View or Acknowledge.

3. Review and edit the Employee Comments, if applicable.

4. Click Acknowledge Review at the top or bottom of the document, then OK.

Your manager will mark the document as complete. You 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 Mid-Year Review.
- Take the online course: Employee: Completing Your Mid-Year Review.

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