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

### General Process Flow between You and Your Employee

<table>
<thead>
<tr>
<th>Employee...</th>
<th>You...</th>
</tr>
</thead>
</table>
| 1 • Enters comments into and completes **Employee’s Document**.  
  Note: These comments will appear in the **Manager's Document** after you share the Manager's Document with the employee. | 2 • Review the **Employee’s Document**.  
  • Enter your comments into the **Manager's Document** in the **Overall Summary**. Reserve the **Manager Comments** section to add comments during or after meeting with the employee.  
  • Share the **Manager's Document** with your employee. **Note**: You can also share the document as you meet with the employee. |
| 3 • Reviews the **Manager’s Document** and edits the Employee Comments, if applicable.  
  • Meets with you to discuss the **Manager’s Document**. | 4 • Confirm that a meeting with your employee has occurred. **Note**: This action sends a system-generated email for the employee to acknowledge the Manager’s Document. |
| 5 • Acknowledges the **Manager’s Document**. | 6 • Mark the **Manager’s Document** as Complete. |

### Step 1 – Enter Comments into the Manager’s Document and Share it with Your Employee

1. Click **Team Current Documents** in the **Quick Links – Manager Self Service menu**.

2. In the **Current Performance Documents** page, click the **Mid Year Review** link for the employee you want to view.  
   
   ![Diagram](image)
   
   **To reopen your employee’s Goal Setting Document for editing, click Annual Review, then click the View link. Click Reopen and then Reopen again. Remember to mark the document as complete after the edits are done.**

3. You can view the **Employee Document** by clicking **View**, but you cannot edit it. To start entering comments into the **Manager’s Document**, click **Start**. Click **Edit** or **Share w/Employee** if the document has been opened.
4. Add comments to the Overall Summary. (Required)
5. For information on how to use Writing Tools see the Completing the Mid-Year Review work instruction.
6. Click to save edits.
7. When finished, click then to confirm.

Step 2 – Meet with Employee
1. Meet with the employee and discuss the mid-year review.
2. Confirm that you have met with the employee by clicking on the document then to confirm.

Your employee will receive an email request to acknowledge the document. If the employee cannot or will not acknowledge the document, you can acknowledge it.

Acknowledge the Document for the Employee
1. Access the Mid Year Review via Quick Links.
2. Click Acknowledge.
3. Click at the top or bottom of the document, then to confirm.
4. Click a radio button to select a reason then to confirm.

Step 3 – Mark the Document as Complete
5. Access the Mid Year Review via Quick Links>Team Current Documents>Mid-Year Review.
6. Click Complete.
7. Click Complete at the top or bottom of the document then and again to confirm.

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 Mid-Year Review.
- Take the online course: Manager: Completing the Mid-Year Review.

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