

Employee Performance - Phase One Process

Step 1: Log into your PeopleSoft Human Resources Account.

Step 2: On your Employee Self Service homepage, click on the Performance tile.

Step 3: Click on the My Documents tile.

Step 4: Your performance document will be automatically added to your account. Click on the performance document to open it. Contact HR if you don't have a document and you think you should.

Step 5: Read the instructions in the performance document. Employees enter goals and competencies in Phase One. PeopleSoft also refers to this section as the Define Criteria section, as you are inputting the criteria that is being reviewed and reflected on.

Step 6: To enter your two goals and one reflection on the past year, click on the Plus Sign button on the right side of the goals box. A pop-up will appear where you can enter the title of your goal and the description of your goal. If your screen is cutting off the description box, you can either use your scroll to view it or click out of the goal and then back in. That will reset the box.

Step 7: After you have entered a minimum of two goals and one reflection in the Goals section, move down to the Competencies section.

Step 8: Click the Plus Sign button on the right side of the Competencies section. A pop-up will appear. If you want to use pre-defined competencies, click the Search button. Make sure there is no text in any of the boxes when you click the Search button. 11 pre-defined competencies will appear. If you choose to make your own competency, toggle to the "Your Own" at the top of the Competencies pop-up and add the title and description.

Step 9: Add three competencies.

Step 10: At the top of the page, hit the Save button to save your work.

Step 11: Once you are ready to have your supervisor review your goals and competencies, hit the three vertical dots to the right of the Save button. Select the "Notify" option and complete the pop-up notify box that appears. This will email your supervisor.

Step 12: Phase 1 is complete. If your supervisor has any edits they want you to make to this Phase, they will let you know.