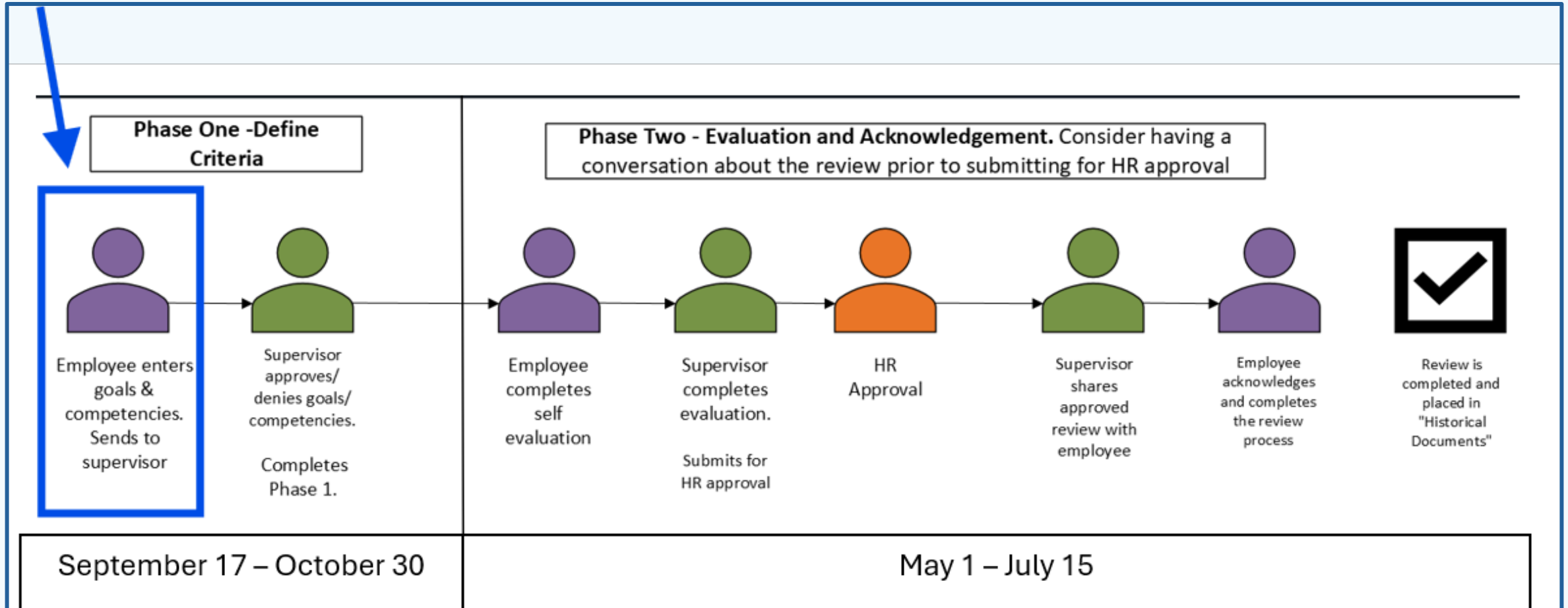


Performance Management Process

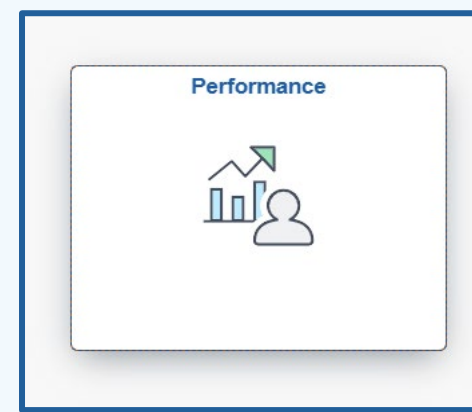
Employee Process Overview Phase 1

The employee starts the performance process in Phase 1 by entering their goals and competencies in the PeopleSoft Performance Document.

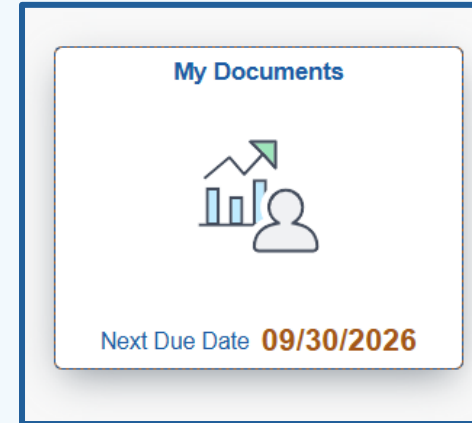
We are here!



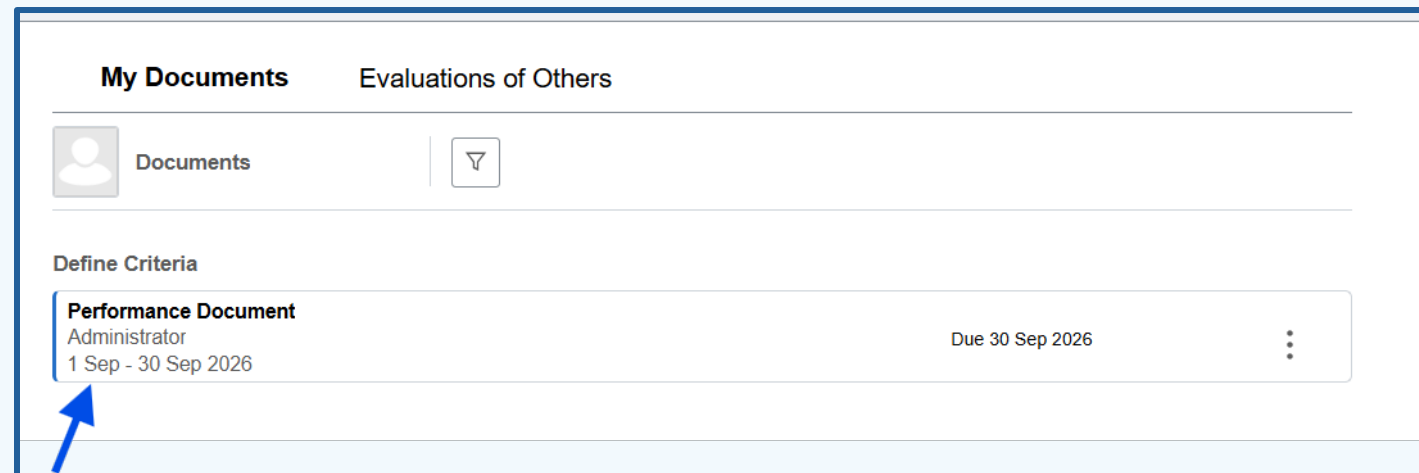
Step 1: Log into PeopleSoft and click on the “Performance” Tile.



Step 2: Click on the “My Documents” tile.



Step 3: Click on the performance document that is available.



Step 4:

Read the instructions.

Click the “Plus Sign” button to add your goals and competencies.

Step 1 of 3

Define Criteria

Employee Goals

1. Using the **Plus Sign** button to the right, add at least two goals for the upcoming year. Add one reflection on last year and opportunities for growth.

2. When listing goals, provide timeframes and milestones where appropriate. Consider using the SMART goal structure (Specific, Measurable, Achievable, Relevant, and Time-Bound).

Evaluated by Employee, Manager

No items have been defined in this section.

Competencies

1. Using the **Plus Sign** button to the right, add at least three core competencies to be reviewed during the period.

2. If you would like to use a pre-defined competency, hit the search button to show the options. If you use a pre-defined competency, the description will be preloaded for that competency after you save. Otherwise, select the "Your Own" option to enter an individual competency and add your own description.

Evaluated by Employee, Manager

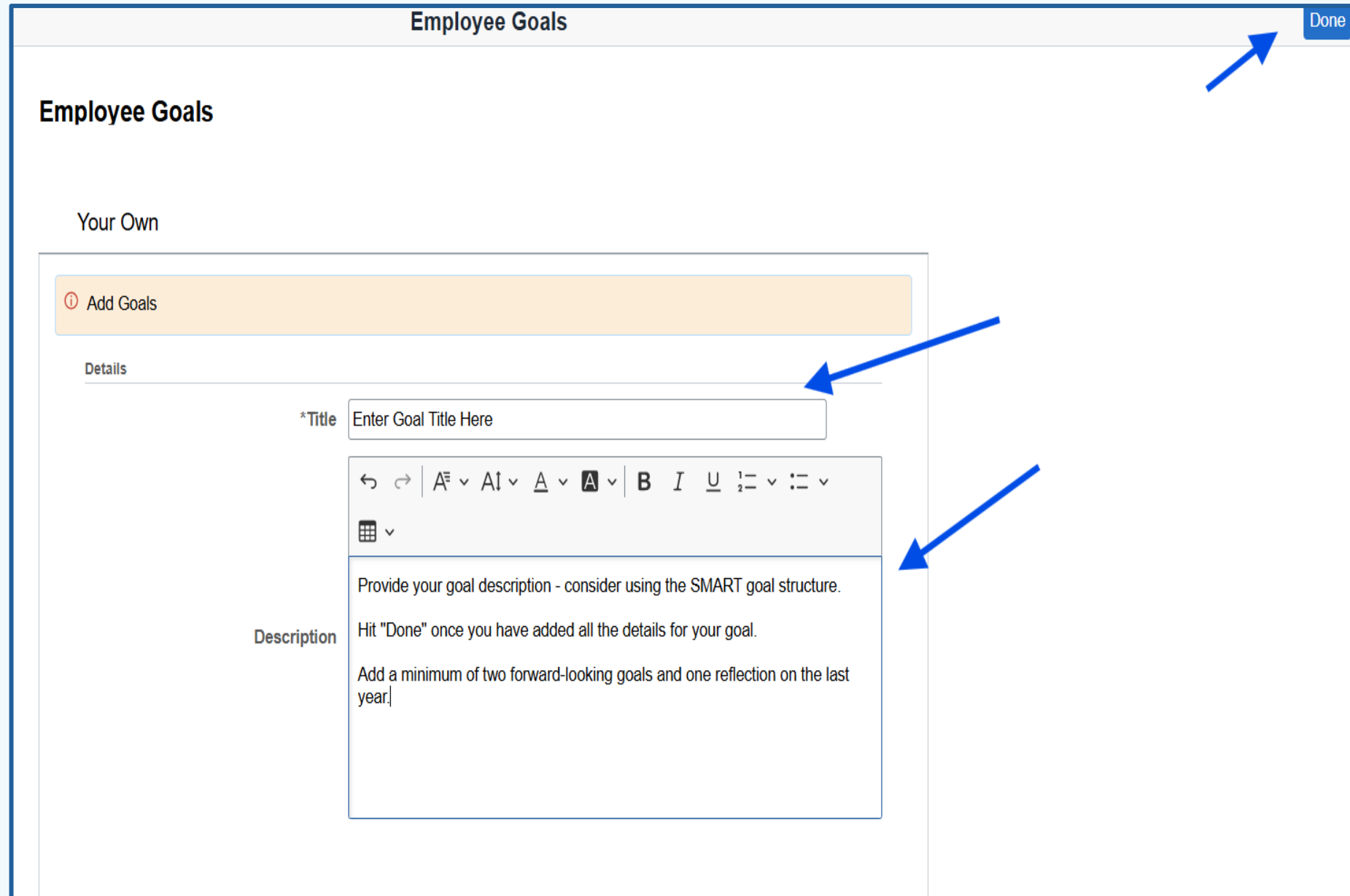
No items have been defined in this section.

Step 5:

Enter the title and description of your goal (use the SMART structure if you wish).

Hit the “Done” button to finish entering the goal.

TIP: If the goal box is sized oddly, click out and back in.



The screenshot shows the 'Employee Goals' interface. At the top right is a 'Done' button, indicated by a blue arrow. Below the title 'Employee Goals' is a section labeled 'Your Own'. Inside this section is an orange 'Add Goals' button with an information icon. Below the button is a 'Details' section containing a text input field for the goal title, labeled '*Title' with the placeholder 'Enter Goal Title Here'. A blue arrow points to this field. Below the title field is a rich text editor for the goal description, labeled 'Description'. It includes a toolbar with icons for undo, redo, text color, background color, bold, italic, underline, link, and unlink. A blue arrow points to the description area. The description text reads: 'Provide your goal description - consider using the SMART goal structure. Hit "Done" once you have added all the details for your goal. Add a minimum of two forward-looking goals and one reflection on the last year.'

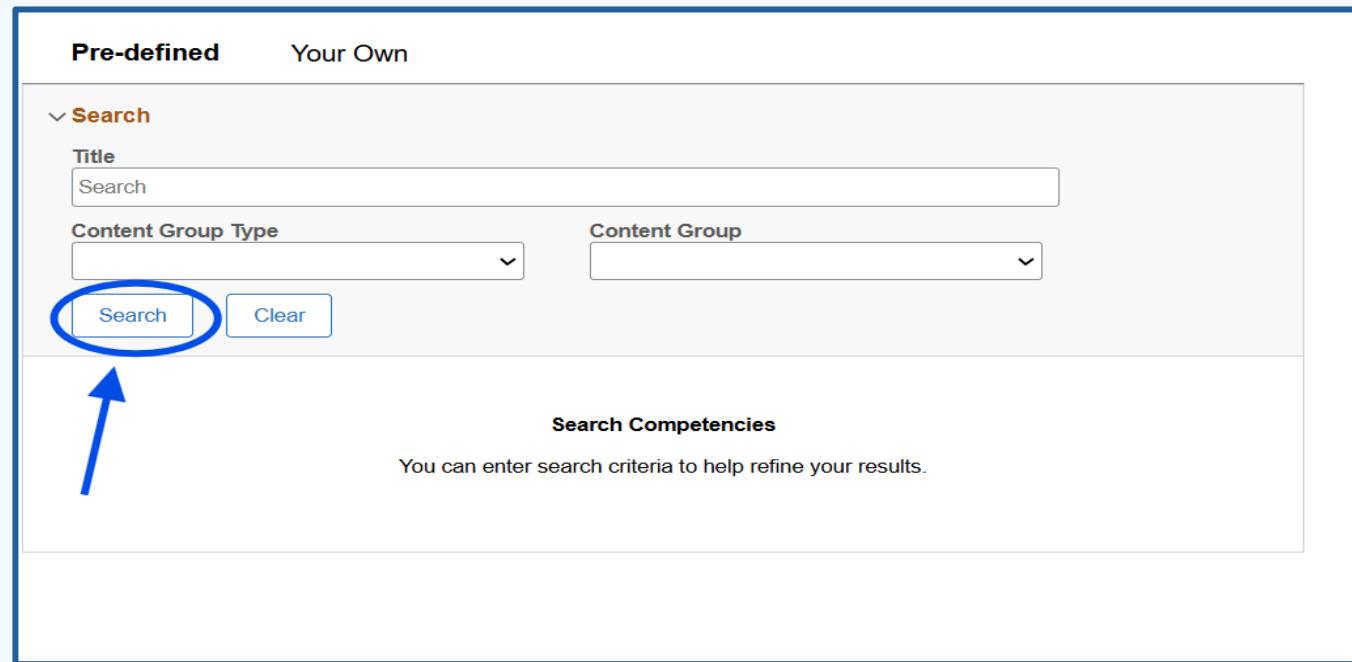
Step 6: Competencies

Click the Competencies “Plus Sign.”

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 (top photo).

11 pre-defined competencies will appear (bottom photo).

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.



Pre-defined Your Own

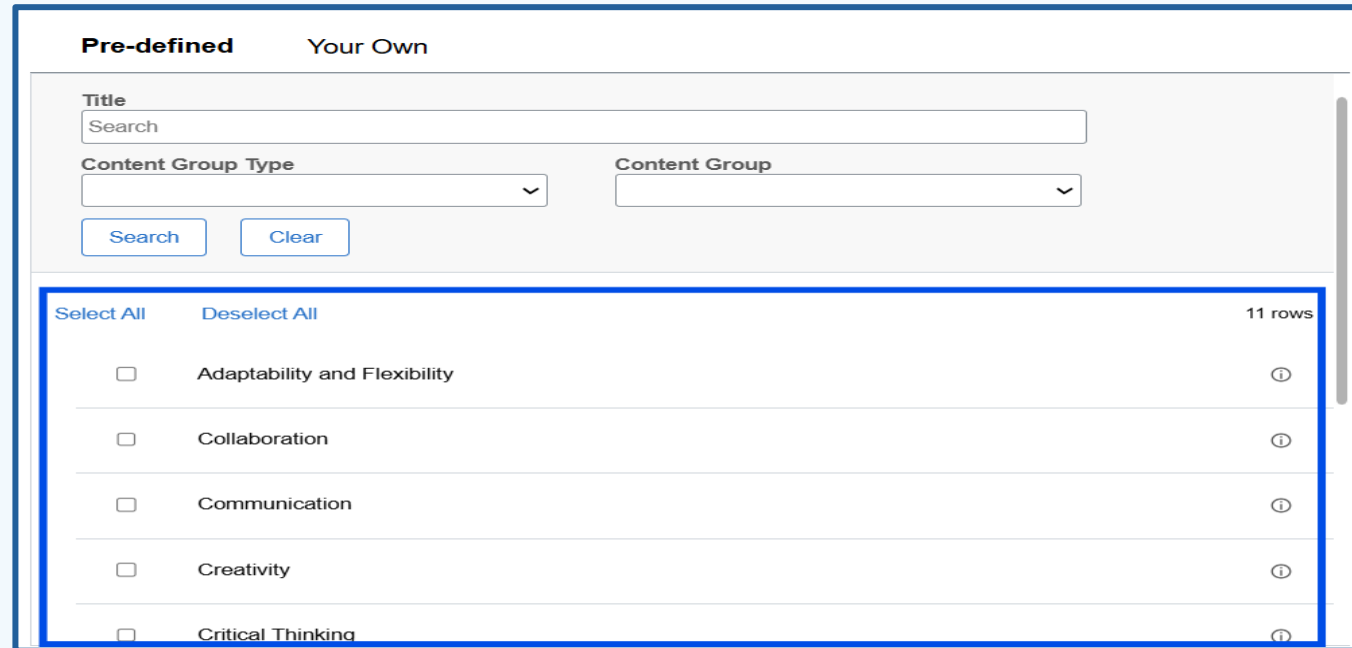
▼ **Search**

Title
Search

Content Group Type Content Group

Search Clear

Search Competencies
You can enter search criteria to help refine your results.



Pre-defined Your Own

Title
Search

Content Group Type Content Group

Search Clear

Select All	Deselect All	11 rows
☐	Adaptability and Flexibility	
☐	Collaboration	
☐	Communication	
☐	Creativity	
☐	Critical Thinking	

Step 7:

After adding your goals and competencies, your performance document will look like the picture to the right.

Step 1 of 3
Define Criteria

Employee Goals

1. Using the Plus Sign button to the right, add at least two goals for the upcoming year. Add one reflection on last year and opportunities for growth.
2. When listing goals, provide timeframes and milestones where appropriate. Consider using the SMART goal structure (Specific, Measurable, Achievable, Relevant, and Time-Bound).

Evaluated by Employee, Manager

Forward Looking Goal #1	
Forward Looking Goal #2	
Reflection on Last Year and Growth Areas	

Competencies

1. Using the Plus Sign button to the right, add at least three core competencies to be reviewed during the period.
2. If you would like to use a pre-defined competency, hit the search button to show the options. If you use a pre-defined competency, the description will be preloaded for that competency after you save. Otherwise, select the "Your Own" option to enter an individual competency and add your own description.

Evaluated by Employee, Manager

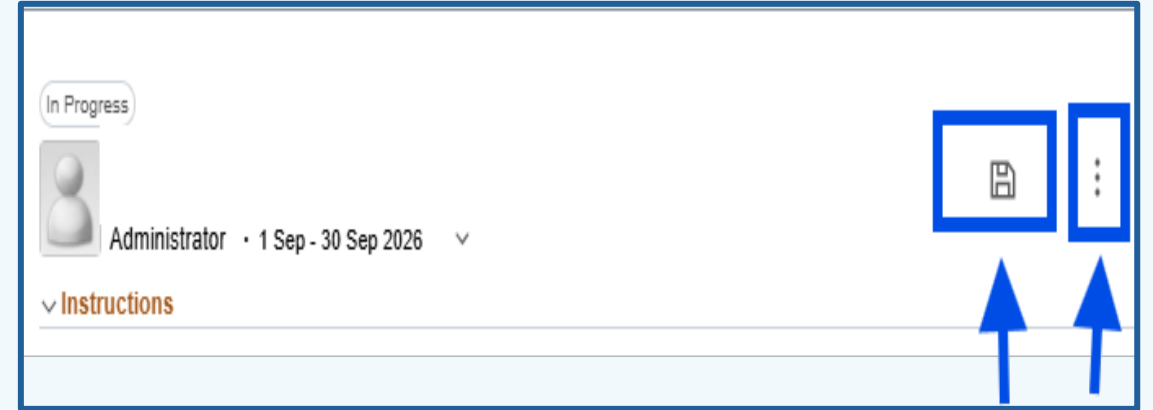
Adaptability and Flexibility	
Collaboration	
Communication	

Back to Top

Step 8: Notifying your Supervisor

When you are ready for your supervisor to review your goals, scroll to the top of the page.

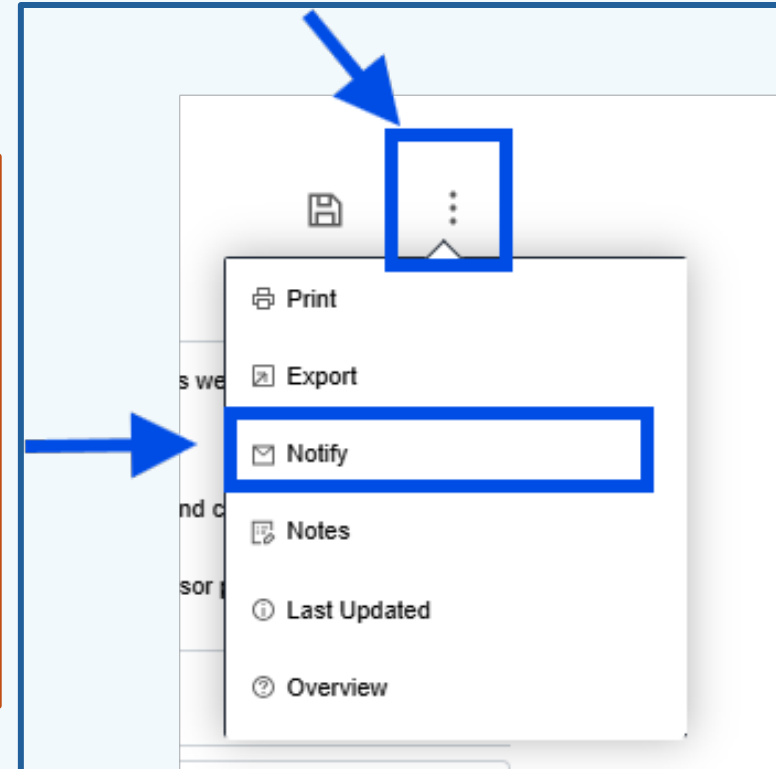
Hit the “Save” button and then the three dot menu.



Step 9: Notifying your Supervisor

When the three dot menu opens, hit the “Notify” button and let your supervisor know you are done.

Your supervisor will receive an email with your notification.



Employee Phase 1 Complete

Your supervisor has now received your document and will complete their portion, which includes reviewing and approving your goals.