The Guide for Managers and Employee (One on One)

Manager- Share with Employee

- To complete the evaluation process, the evaluation should be shared with the employee and a meeting should be scheduled to discuss.
- Discuss upcoming goals for 2023 - managers should discuss goals and expectations for the coming calendar year.
- Request acknowledgement - this step asks the employee to provide comments and acknowledge that the evaluation has been reviewed.

Why is the performance review important?

- An open, honest, frequent dialogue helps build trust among employees, managers, and the organization at large.
- Ongoing performance conversations can help managers understand the obstacles and decisions before it impacts performance.
- Opens opportunities to discuss feedback, celebrate recognition, and reinforce alignment to the department’s goals.

How to prepare for a performance review?

- Sync performance review, employee goals and goals progress - employees should understand what constitutes good and bad performance. Measure impact, define success, ensure that performance plans are working, and define the next steps.
- Gather employee data and examples - previous performance conversations, notes from 1-1 meetings, examples of recognition, etc.
- Prepare notes and agenda - both parties should work together to prepare a shared agenda and notes with key talking points.

Conducting the Performance Review?

- Reflect on the past but focus on the future - performance conversations should give employees the opportunity to address and correct performance in real-time and continuously see how their work aligns with the organizational goals.
- Discuss upcoming goals for 2023 - managers should discuss goals and expectations for the coming calendar year.
- Request acknowledgement - this step will ask the employee to provide comments and acknowledge the evaluation has been reviewed.
From the PeopleSoft homepage, select the Manager Self Service option from the dropdown.

Select the Team Performance tile.

A list of available Current documents will appear. Select the employee with document status of Approved.

Select Share with Employee.

Select Confirm. This will send an email to the employee and allow him/her employee to review the evaluation.
After sharing with employee, the manager will schedule a one on one session with the employee to discuss the evaluation. This step is outside of PeopleSoft.

6. After the one on one session, click on Request Acknowledgement.
7. Select Confirm. This will notify the employee that s/he can now add comments and acknowledge they have read and discussed the document with you.

If the employee is unavailable or refuses to acknowledge follow steps 8–10. Otherwise, wait for the employee to acknowledge and continue to step 11.

8. Select Override Acknowledgement only if the employee is unavailable or refuses to acknowledge the evaluation.
9. Choose a reason for overriding Acknowledgement.
10. Select Confirm.

After the evaluation has been acknowledged, the performance document will show the option to Complete on the top right corner, this will finalize the evaluation process.

11. From the top right corner select Complete.
12. Select Confirm to finalize the evaluation process.

Remember to constantly save your work, PeopleSoft will automatically time out due to inactivity and this may cause you to lose unsaved work.
1. From the PeopleSoft homepage, select the Employee Self Service option from the dropdown.
2. Select the Performance tile.
3. From the My Current Documents page, select the document which shows a status of Pending Acknowl-
4. Go to the Employee Comments tab.
5. Add employee comments (optional).
6. From the top right corner, click Acknowledge.
7. Select Confirm to complete this process.