Manager View of Form:

Instructions:

Goals:

Employee Comments

Your Employee has not shared their comments

Attachments

No Attachments have been added to this document

Add Attachment

Mid-Year:
### Mid-Year Summary

#### Manager Comments

<table>
<thead>
<tr>
<th>Writing Tools</th>
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#### Employee Comments

- Your Employee has not shared their comments

### Annual:

#### Long Format

<table>
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<th>Instructions</th>
<th>Goals</th>
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#### Overall Summary

Use this space to document your conversations with your employee about the impact they have had during this performance period, including how their work has contributed to the success of your organization. Note what they have accomplished, how they approached their work, and professional development progress for this current period.

After you have entered comments and selected a rating, you can complete the Annual Review by clicking on the Complete Annual button at the top right.
### Competencies (I added a few so you can see what it looks like populated):

#### Building Partnerships
**Description:** Identifies opportunities and takes action to build strategic relationships between one’s area and other areas, teams, departments, units, or organizations to help achieve business goals.

*Created By: Nathan Hall*  
*08/24/2018 2:31PM*

#### Continuous Learning
**Description:** Actively identifies new areas for learning; regularly creates and takes advantage of learning opportunities; uses newly gained knowledge and skills on the job and learns through their application.

*Created By: Nathan Hall*  
*08/24/2018 2:31PM*

### Feedback:

#### Feedback from all Reviewers (Optional)
Comments from completed feedback reviewers are displayed below.

*Please provide a meaningful summary of the feedback you received this year about Paul Nash in the comments section of the appropriate tab. Make sure to share comments exactly as they were written by other reviewers.*

*Click Expand to view the feedback.*

#### Context and Impact of Work
**Description:** Over the past year, in what context did you work with this person, and what behaviors did this person demonstrate that positively impacted you and your organization?

*Created By: Template*  
*09/23/2018 5:18PM*

#### Opportunities for Improvement
**Description:** In the spirit of continuous improvement, what could this person have done differently or better to be more effective in their work with you?

*Created By: Template*  
*09/23/2018 5:18PM*

#### Demonstration of Team/Org values
**Description:** How has this person modeled their team/organization values this year (if applicable)?

*Created By: Template*  
*09/23/2018 5:18PM*
Employee view of Form:

Instructions:

This document is designed to capture key highlights of your ongoing conversations with your manager during the current period. Your school or unit will provide guidance on which sections to complete and when.

Information is provided on the purpose of each section after clicking on the section’s tab.

Enter your comments in the appropriate sections. When you are ready to share your comments or complete your self-evaluation, you may do so by selecting the appropriate button. You can start or stop sharing at any time. You are encouraged to discuss with your manager, in advance, if you will share your comments.

Save - Save your work often by clicking on the Save button.

Start Sharing - All comments on your document below become visible to your Manager. Your Manager will continue to see your changes whenever you update and save your document.

Stop Sharing - Your comments will no longer be visible to your Manager until you Start Sharing again.

Complete Annual - This completes your Self Evaluation and shares your comments with your manager. No further changes/updates can be made after completing your document. Click this button at the end of the annual review period.

To notify your Manager that you updated this document, click on the Notify link on the top right to send your Manager an automated email with a link to this document.

Goals:

Use this space to document your conversation with your manager about your goals or priorities, and professional development areas of focus for the current performance period. Include notes on the intended impact of your work. If applicable, use the separate “Competencies” tab to review the specific competencies you will focus on as discussed with your manager.
Mid-Year:

Use this space as frequently as you wish to document discussions with your manager about progress you have made on your goals or priorities, and professional development. Note where new challenges or opportunities have shifted your goals or priorities or professional development.

Employee Comments

Manager Comments

Your Manager has not shared their comments

Annual:

Overall Summary

Use this space to document your conversation with your manager about the impact you have had, including contributions to your team/department, during this performance period. Include what you have accomplished and how you have approached completing your goals or priorities, and professional development areas and progress.

When you have completed your self evaluation, click on the Complete Annual button at the top right.

Employee Comments

Manager Comments

Your Manager has not shared their comments
Competencies:

You and your Manager should meet and discuss which competencies should be added for the current performance cycle. Competencies are added to the Manager Evaluation only.

To review the competency definitions, click on Competency Dictionary.

Audit History

Created By Anna Wong 08/23/2018 5:16:35PM
Last Modified By Paul Nash 08/23/2018 5:17:09PM

Feedback:

Feedback from all Reviewers (Optional)

To select reviewers, click on the Reviewers link in the Steps and Tasks panel on the left. After selecting reviewers, click on the Notify link in the top right to send your Manager an automated email requesting reviewer approval.

All feedback reviewers are asked the questions below. Completed feedback reviews are visible only to your Manager.

Expand | Collapse

- Context and Impact of Work
- Opportunities for Improvement
- Demonstration of Team/Org values

Audit History

Created By Anna Wong 08/23/2018 5:16:35PM
Last Modified By Paul Nash 08/23/2018 5:17:09PM
FY20 Performance Management Instructions List and Visual Diagram

- Initial FY20 Manager and Employee Conversation
- Employee Documents Goals and/or Priorities in PeopleSoft
- Employee shares document with manager (optional)
- Manager reviews and adds comments under Goals
- Manager shares document with employee (optional)
- Mid-Year/Ongoing Conversation: Manager and employee meet as often as they choose to discuss responsibilities and needs
- Employee uses Mid-Year or Ongoing Conversation tab to document discussions with manager as they choose. May also formally provide mid-year comments based on school/unit direction
- Manager uses Mid-Year or Ongoing Conversation tab to document discussions with employee as they choose. May also formally provide mid-year comments based on school/unit direction
- Employee selects feedback reviewers, if applicable. Reviewers may be nominated at any time
- Manager nominates and invites reviewers to provide feedback for respective employees
- End of year, or end of review period, “Annual” Manager and Employee conversation
- Employee documents highlights from conversation about performance, impact, and professional development. Employee completes self-evaluation
- Manager documents highlights from conversation about the employee’s overall performance, impact, and professional development. Selects overall rating. Manager completes annual review
- Employee acknowledges review. This completes the annual review process in PeopleSoft
Feedback can be gathered at any time and more than once during the year.

Use of Competencies, Conducting Formal Mid-Year Discussions, and Soliciting Feedback are determined by School/Unit