This **Quick Start** provides basic instruction on reviewing and completing your employee’s goals in PeopleSoft:

### General Document Process Flow between You and Your Employee

<table>
<thead>
<tr>
<th>Employee…</th>
<th>You …</th>
</tr>
</thead>
</table>
| 1 | Meets with you to discuss goals for the upcoming FY.  
• Enters goals and competencies to **Set Goals**.  
• Notifies you when it is ready for review. | 2 | Review and edit the employee’s goals.  
• Set up meeting with employee to review/finalize the goals. |
| 3 | Meets with you to review the goals.  
• Makes final edits to the document. | 4 | Review and edit the document  
• **Click Complete** in Set Goals.  
  o Document becomes view-only. |

A change occurs to the employee’s goals during the year:

<table>
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<tr>
<th>Employee…</th>
<th>You …</th>
</tr>
</thead>
</table>
| 1 | Tells you edits to the goals are needed.  
• (with checkpoint): provides the edits/additions to you. | 2 | (with checkpoint) Adds and edits the goals  
• (without checkpoint) Reopen the **Set Goals**.  
  o |
| 3 | (without checkpoint) Makes edits, and notifies you when the edits are ready for review. | 4 | (without checkpoint) Review/edit the goals set it to complete. |

### Access your employee’s performance document to view/edit goals:

1. Click the **Team Performance** tab from the PeopleSoft homepage.
2. Click on the current (open) document you want to access.

### Goals tab | Organization Goals, Job and Performance Goals, and Professional Growth and Development Goals

3. Click > **Expand** to review Organizational Goals, if applicable.
4. **Edit** or delete the goals as needed.
5. Click “Add a …. Goal.”
6. Select to either “Add your own goal” or “Copy from My Team’s Documents”
   a. Enter all applicable goal fields if adding your own goal, OR
   b. Select the document and goal(s) to add.

### Competencies tab | Core Competencies, Additional Competencies
7. Click > Expand to review detail on the Competencies.

8. Add Additional Competencies by clicking Add a Competency.
   a. Click “add predefined item” to search for and select the competencies, OR
   b. Click “copy items from My Team’s documents” to select competencies used in previous annual review documents.

Click the Competency Dictionary for a full description of all university-wide competencies.

9. (optional): review the questions that may be asked if feedback during the annual assessment is collected through PeopleSoft.

10. (optional, Feedback from Peers/Colleagues) Click Add a question for Other Reviewers to select an additional question or add your own.

11. Meet with your employee to discuss the goals. You and your employee can continue editing the goals, as long as you both click Save.

12. When ready, click Complete, then Confirm.

13. If using the Checkpoint, edits and additions to goals can occur until the goals are finalized. If not using the checkpoint, you can reopen the goals until the beginning of the annual assessment.

Need More Help?

- Review the detailed work instruction: Performance Management: Completing the Employee Goals
- Take the online course: The Performance Management Process

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