

## Manager Steps: Documenting FY23 Year End Performance Conversations in PeopleSoft

The emphasis this year is on **Year End Conversations**, so we are making the PeopleSoft process as simple as possible. Please document your Year End Conversations by following these steps.

1. Log into **PeopleSoft**.
2. Click on **Manage My Team**, then **Team Performance** and select an employee.
3. Click the **Summary** tab (**Ignore the Instructions and Feedback tabs**).
4. Enter a brief summary of the Year End Performance Conversation you had with the employee in the **Manager Comments** field.
5. Select **Not Applicable/No Rating** from the pull-down menu.
6. Select **Complete Annual** in the upper right corner (**\*Do not select Start Sharing**).

### Important Notes:

- **\*Start/Stop Sharing** is a lengthier process that initiates a back and forth exchange with the Employee and will require additional steps by the manager. Select **Complete Annual** instead. The employee will still get to review your comments before they acknowledge the document.
- We are **not** using the **Feedback from Reviewers** feature in PeopleSoft this year.
- Employees will **not** be completing **Employee Self Evaluations** in PeopleSoft this year. **\*\*They may enter comments in the Employee Comments section after the manager completes their steps.**
- When a manager selects **Complete Annual**, it doesn't complete the document; it completes the manager's steps in the review process. The employee actually completes the document by acknowledging the review. Once the manager completes their steps, the system sends an email to the employee that the document is ready for acknowledgement. At that time, the employee can add their own comments (optional) and acknowledge the document, which marks the process complete in the system. (Employees have the last step.)
- Managers should monitor their employees' documents to be sure they are acknowledged **by July 15**. Otherwise, the documents will remain in "pending acknowledge" status, which appears as "incomplete."
- **\*\*Managers can view their employee's comments under "Historical Team Documents" after the document has been marked complete.**

**For assistance with PeopleSoft**, please contact Marybeth Wilcox [mwilcox@seas.harvard.edu](mailto:mwilcox@seas.harvard.edu) or any member of the SEAS HR team:

Kim Harris, [kharris@seas.harvard.edu](mailto:kharris@seas.harvard.edu)

Rowen Harper Gray, [rgray@seas.harvard.edu](mailto:rgray@seas.harvard.edu)

Heidi Shea, [hshea@seas.harvard.edu](mailto:hshea@seas.harvard.edu)