

PERFORMANCE NOTES FOR LEADERS

The following instructions will walk you through how to use the Performance Notes tool as a UF leader. Entering Performance Notes is a way to track your employees' progress throughout the year between Check-ins. These notes are for your reference and can only be accessed by you. There is no requirement to use Performance Notes.

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Human Resources > Manager Self Service > UF Engaged > Maintain Performance Notes

SEARCHING FOR YOUR EMPLOYEE & NOTES

1. To add a new Performance Note, you must choose the employee you intend to write about. Click the **Employee ID Finder icon** or enter their UFID number.

The screenshot shows the 'Performance Notes' tool interface. At the top, there's a title 'Performance Notes' and a section for 'Instructions'. Below the instructions, there's a 'Selection Criteria' section with a search bar labeled '*Employee ID' and a magnifying glass icon (highlighted with a red box). There are also fields for 'Notes From' and 'Through' with calendar icons. At the bottom, there are 'Search' and 'Add a New Note' buttons. A message at the bottom states: 'There are no existing notes for the specified selection criteria.'

2. Click the **Search** button.

The screenshot shows a 'Look Up Employee ID' dialog box. It has a 'Search by:' dropdown menu set to 'Empl ID' and a 'begins with' text input field. There are 'Search' (highlighted with a red box), 'Cancel', and 'Advanced Lookup' buttons. At the bottom, it says 'No matching values were found.'

3. All of your direct reports will appear. Click on the **UFID number** of the employee you would like to write about.

Look Up Employee ID

Search by: Empl ID begins with

Search Cancel Advanced Lookup

Search Results

View 100 1-3 of 3

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
47367810	Gator,Allie	Gator	Allie	(blank)	(blank)
50873606	Gator,Alberta	Gator	Alberta	(blank)	(blank)
93511288	Gator,Albert	Gator	Albert	(blank)	(blank)

4. Every note that you have written about the selected employee will appear. To search for a Note by **Created** date, click on the Notes From **calendar icon**.

Performance Notes

Instructions
Performance Notes is a tool to keep personal notes and track events about each of your employees' performance. Performance Notes should be used as a resource when preparing Quarterly Check-ins, and may be deleted after they are no longer useful. The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information.

To enter a performance note, enter the UFID of the subject employee below, then select the Add a New Note button. To edit or access the details of an existing note, enter the UFID of the subject employee below, then select Search and a list of existing Performance Notes will be listed. Then, select the Performance Note subject that you wish to view or edit. The list can be filtered by entering a Starting Date in the Search Criteria box, then selecting the Search button.

Selection Criteria

*Employee ID 93511288 Gator,Albert

Notes From [calendar icon] Through

Search Add a New Note Documents

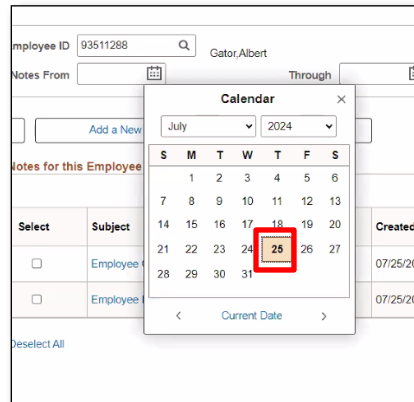
Existing Performance Notes for this Employee

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

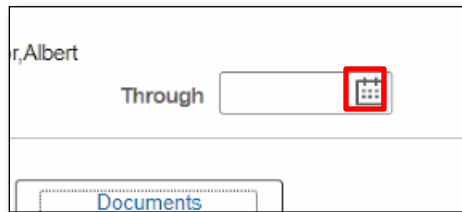
Select All Deselect All

Delete

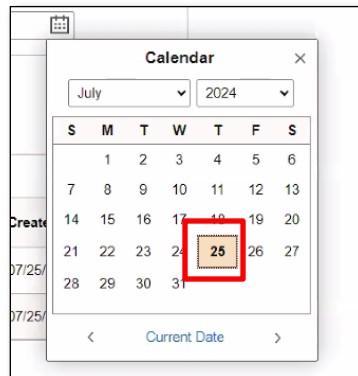
5. Select the **first date** that you would like displayed in your search.



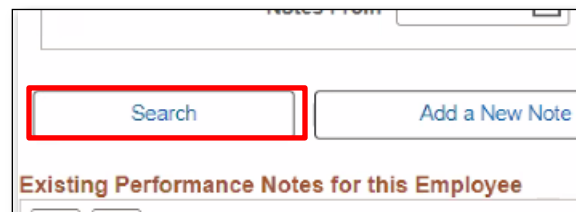
6. Click on the Through **calendar icon**.



7. Select the **end date** that you would like displayed in your search.



8. Click the **Search** button.



- Only the Notes created within your chosen date range will appear.

Existing Performance Notes for this Employee

1-2 of 2

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

Select All Deselect All

ADDING A NEW NOTE

- To add a new Performance Note, click the **Add a New Note** button.

NOTES FROM [] through []

Search **Add a New Note** Documents

Existing Performance Notes for this Employee

- On the **Add/Update Notes** page, type a Subject for your note. It is recommended that the **Subject** be a key word or phrase that will remind you of the content of the note.

UF Engaged

The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information.
For more information on using Performance Notes, visit <http://training.hr.ufl.edu/resources/ufengaged/ufengagedleaders/index.html>

Add Performance Note

Applications

Employee ID 93511288 Gator Albert Created 07/25/2024 1:38PM
Creator Doe, Jane
Updated By
Updated By Documents

Subject []
Note Text []

3. In the **Note Text** section, enter specific details about the employee's performance.

It is recommended that in the **Note Text** section you include any and all relevant information about the **Subject**. You can enter as much or as little as you would like. This will be a reference tool for when you are creating your employee's Check-in. Some examples of interactions that might be recorded include:

- Large projects that your employee has completed
- Descriptions of team projects that your employee has participated on
- Key conversations held between you and your employee
- Awards they have received
- Accolades or employment actions given to the employee

4. Click the **Save** button.

5. Click the **Return to Performance Note Selection** link. The Note you just created is listed on the Performance Notes page by the Subject name

ADDING TEXT OR EDITING AN EXISTING PERFORMANCE NOTE

1. Click on any **Performance Note** to add text or edit the note.

Existing Performance Notes for this Employee

1-3 of 3

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Project Completed	07/25/2024 1:39PM
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

Select All Deselect All

Delete

2. To add to or edit a note, click in the **Note Text** field and make your intended changes or additions.

Updated By Documents

Subject Employee Project Completed

Note Text Employee finalized month-long project on July 1st

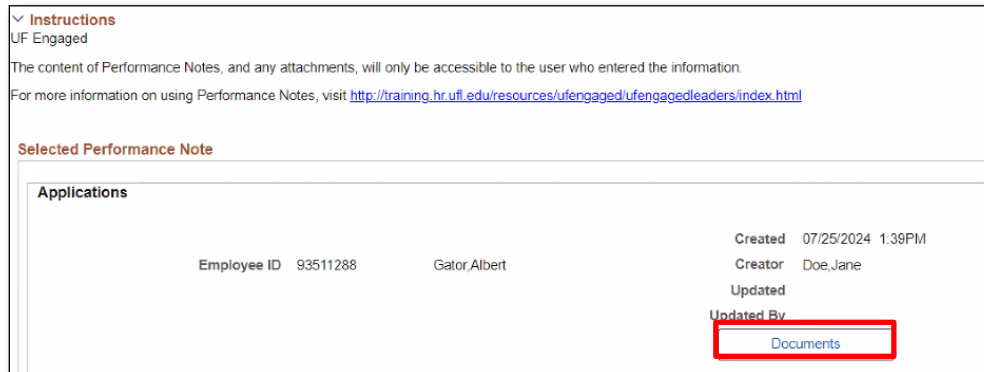
3. Click the **Save** button.

Save

Return to Performance Note Selection

UPLOAD DOCUMENTS TO A NOTE

1. In addition to saving text, you can upload relevant Documents. While on the **Add/Update Notes** page, click on the **Documents** button. Please note that while you may choose to upload documents as a memory aid and/or for your reference when completing your UF Engaged Check-Ins, you will not be able to attach documents to the actual Check-ins themselves.



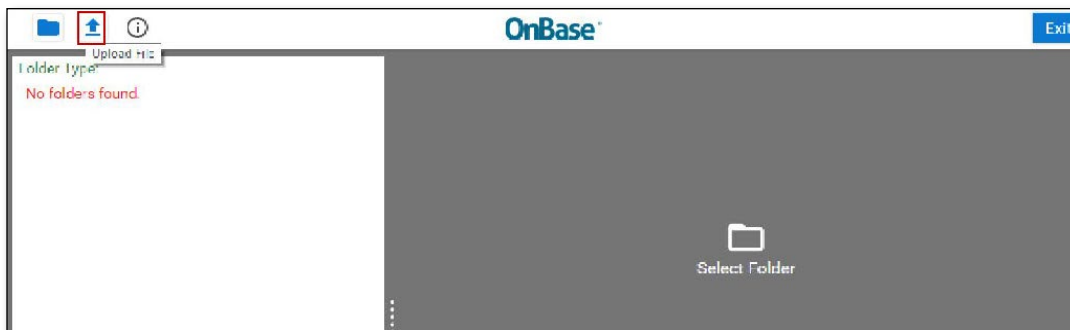
Instructions
UF Engaged

The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information.
For more information on using Performance Notes, visit <http://training.hr.ufl.edu/resources/ufengaged/ufengagedleaders/index.html>

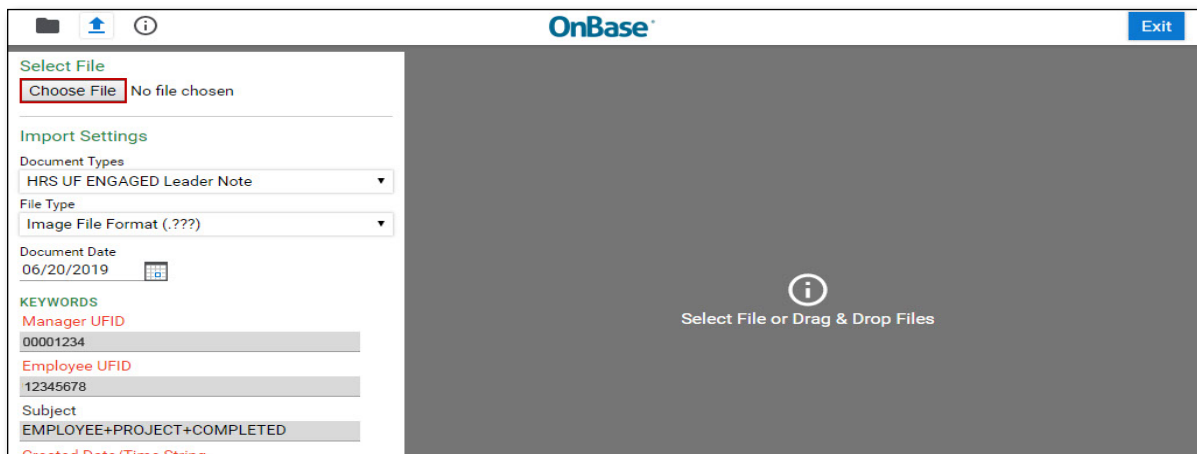
Selected Performance Note

Applications	
Employee ID	93511288
Gator	Albert
Created	07/25/2024 1:39PM
Creator	Doe,Jane
Updated	
Updated By	Documents

2. Document storage is facilitated through OnBase. Click the highlighted **Upload** icon.



3. Click the **Choose File** button.



OnBase

Choose File No file chosen

Import Settings

Document Types: HRS UF ENGAGED Leader Note

File Type: Image File Format (.???)

Document Date: 06/20/2019

KEYWORDS

Manager UFID: 00001234

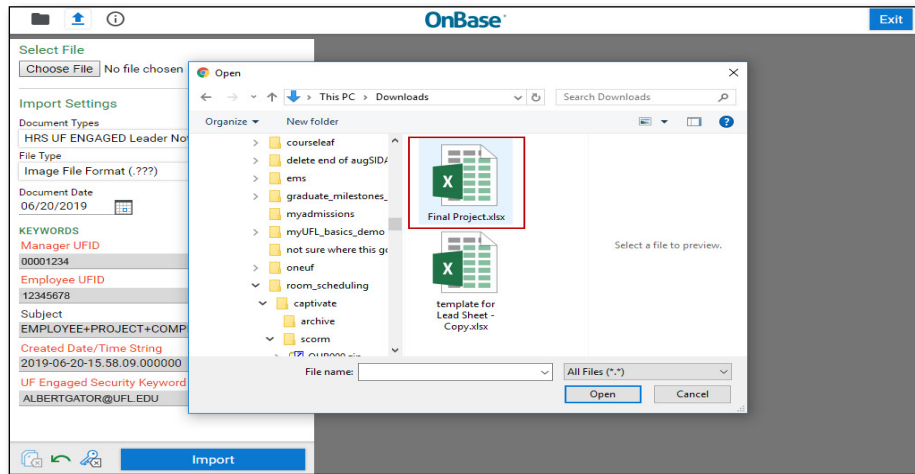
Employee UFID: 12345678

Subject: EMPLOYEE+PROJECT+COMPLETED

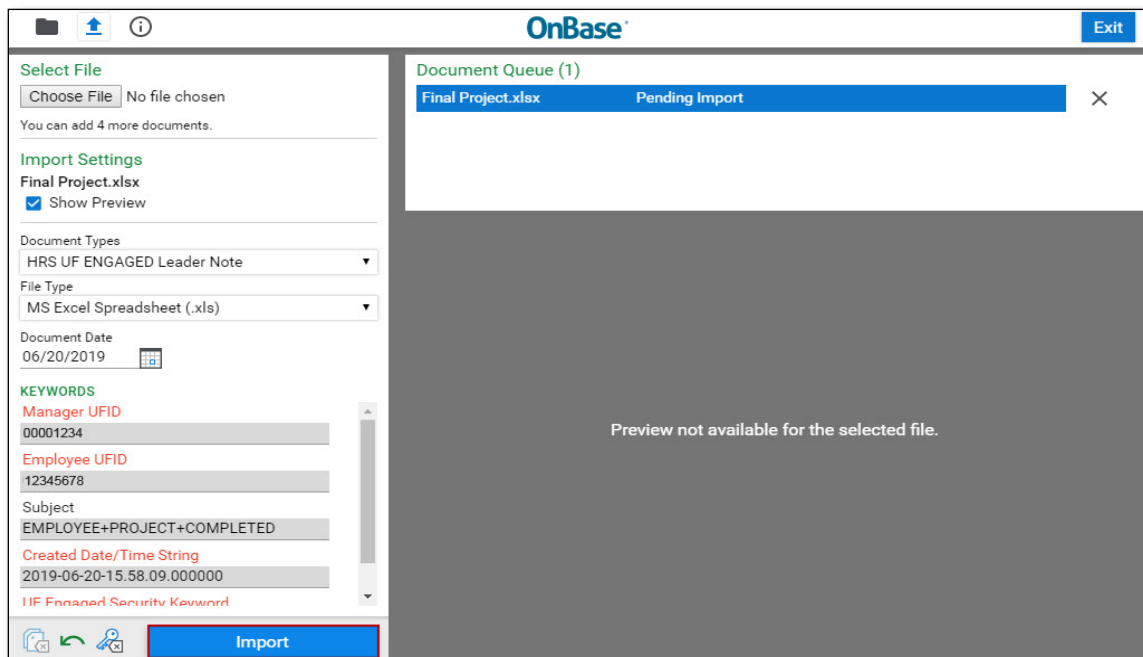
Created Date/Time String

Select File or Drag & Drop Files

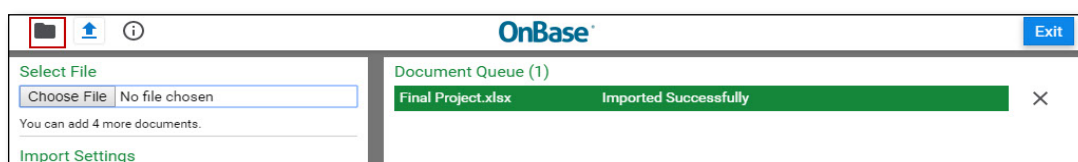
4. Navigate to and select the **file** you would like to upload.



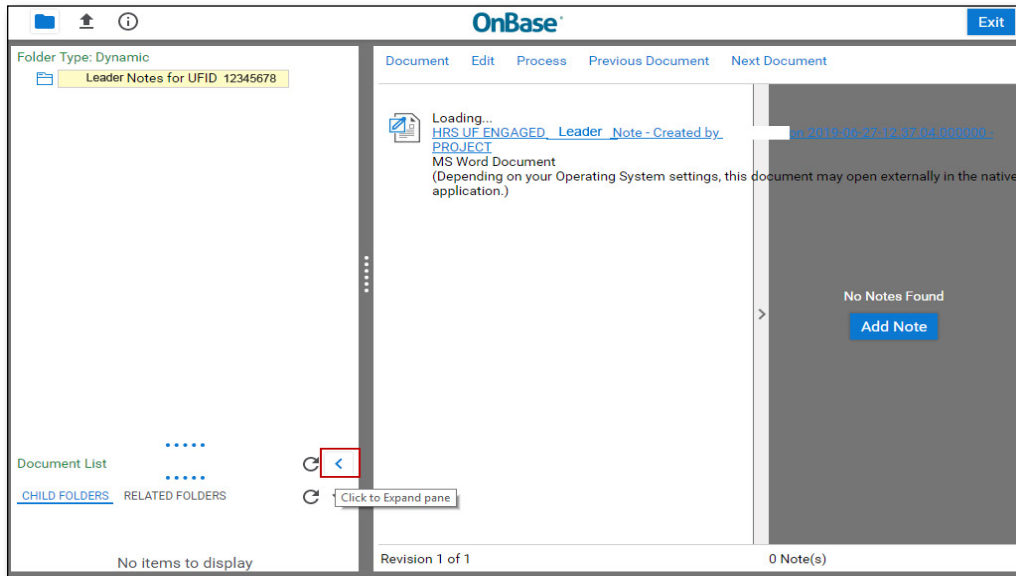
5. Note that in the Document Queue, it states “Pending Import”. Click the **Import** button.



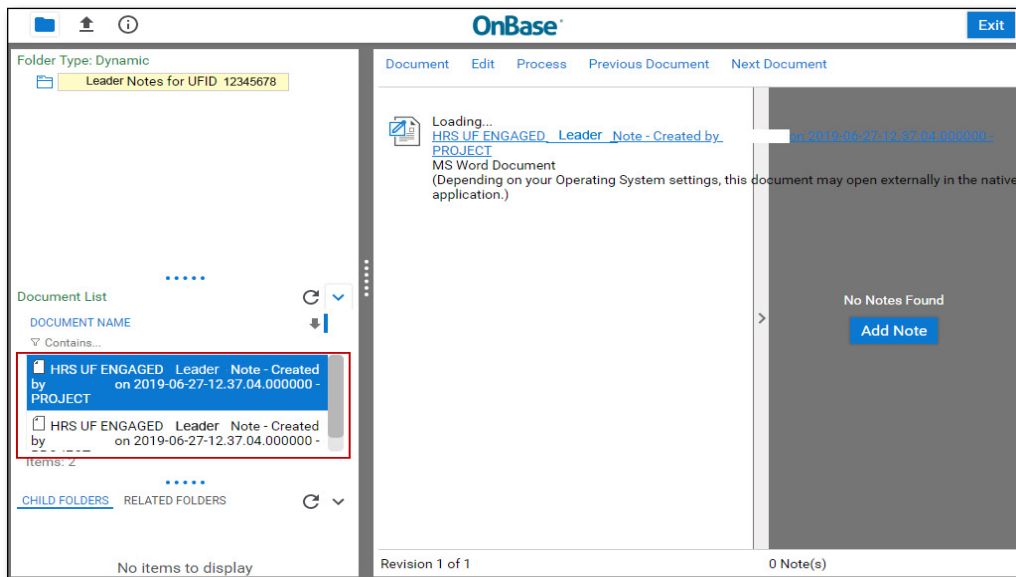
6. Note that in the Document Queue, the document shows as “Imported Successfully”. To see all imported documents for this note, click the red highlighted **Folder** icon.



7. You can see all of the documents that you have uploaded to this Note in the folder page. Click the **arrow** to display them.



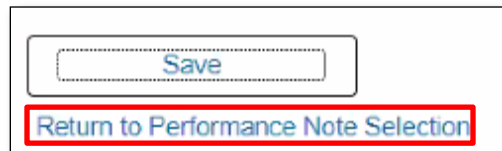
8. Your documents will appear in the **Document List**. Depending on how many documents you have uploaded, you may need to scroll down to view them all.



9. To return to the Note, click the highlighted **Exit** button.



- At this point you can either enter more text and **Save** or return to the My Performance Notes menu by clicking the **Return to Performance Note Selection** link.



VIEWING ALL UPLOADS FOR AN EMPLOYEE

- From the Performance Notes page, you can view all of the documents that you have uploaded for the selected employee by clicking the **Documents** button.

Notes will be listed. Then, select the Performance Note subject that you wish to view or edit. The list can be filtered by entering a Starting Date in the Search Criteria box, then selecting the Search button.

Selection Criteria

*Employee ID: 93511288 Gator, Albert

Notes From: 07/25/2024 Through: 07/25/2024

Existing Performance Notes for this Employee

1-3 of 3

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Project Completed	07/25/2024 1:39PM

- By clicking any **Document**, you will download it to your computer.

OnBase

Custom Query Results

Drag a column header here to group by that column.

NOTE DATE/TIME	SUBJECT	EMPLOYEE UFID	MANAGER UFID	DATE STORED
2019-06-20-15:58.09.000000	EMPLOYEE+PROJECT+C...	12345678	00001234	6/20/2019
2019-06-20-13:17.41.000000	NEW+PROJECTS	12345678	00001234	6/20/2019
2019-06-20-13:17.41.000000	NEW+PROJECTS	12345678	00001234	6/20/2019

Items: 3

DELETING A NOTE

- If you ever need to delete a Note, click on the **check box** next to the note.

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Selection Criteria

*Employee ID: 93511288 Gator/Albert
Notes From: 07/25/2024 Through: 07/25/2024

Existing Performance Notes for this Employee

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Project Completed	07/25/2024 1:39PM
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

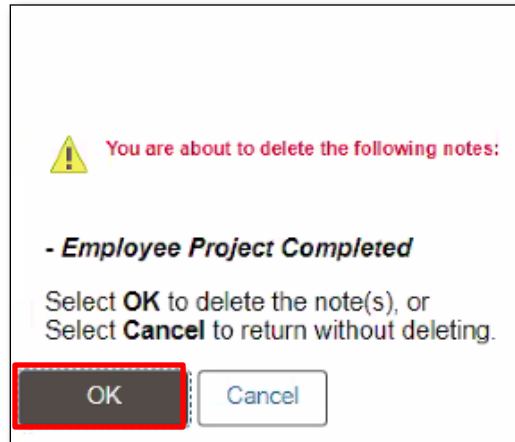
- With the Note(s) selected that you would like to delete, click the **Delete** button.

Existing Performance Notes for this Employee

Employee ID	Select	Subject	Created
93511288	<input checked="" type="checkbox"/>	Employee Project Completed	07/25/2024 1:39PM
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

Select All

- Confirm by clicking the **OK** button.



6. Your note has been deleted.

Selection Criteria

Employee ID 93511288

Gator,Albert

Notes From 07/25/2024

Through 07/25/2024

Search

Add a New Note

Documents

Existing Performance Notes for this Employee

Employee ID	Select	Subject	Created
93511288	<input type="checkbox"/>	Employee Completed Month-Long Assignment	07/25/2024 1:37PM
93511288	<input type="checkbox"/>	Employee Improved	07/25/2024 1:37PM

Select All

Deselect All

Delete