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.

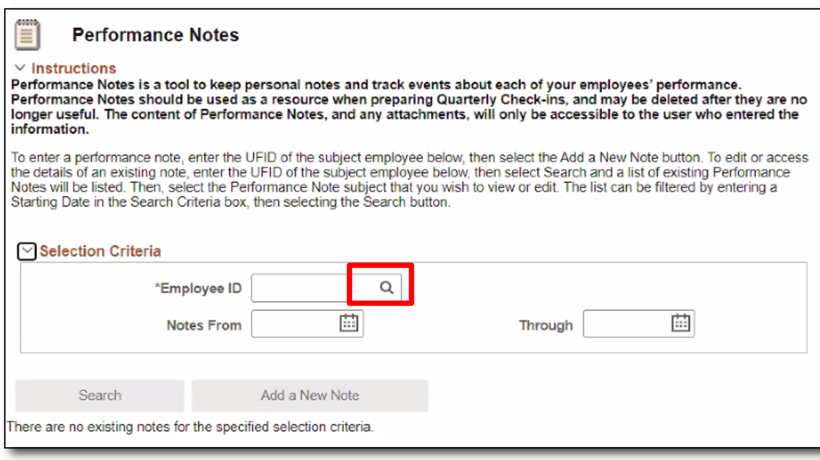
Navigation

Login into myUFL and navigate to:

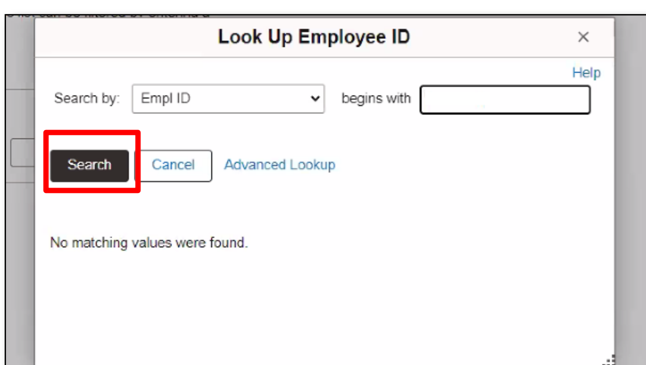
Nav Bar > Main Menu > Human Resources > Manager Self Service > UF Engaged > Maintain Performance Notes

Searching for Your Employee & Notes

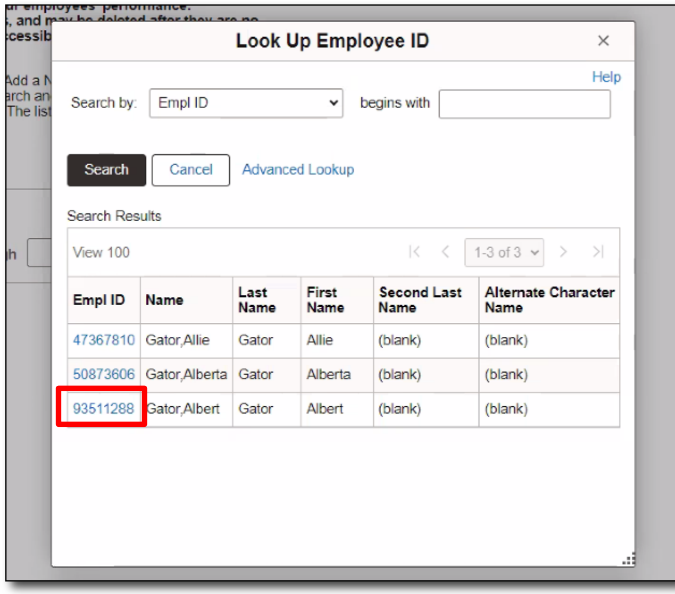
1. To add a new Performance Note, you must choose the employee you intend to write about. Click the **Employee ID Finder icon** or enter their UFID number.



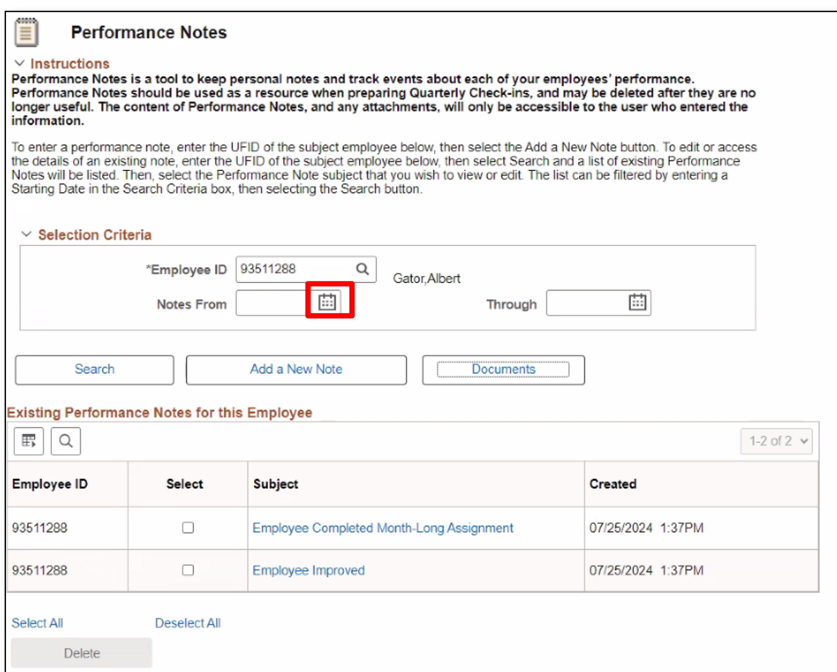
2. Click the **Search** button.



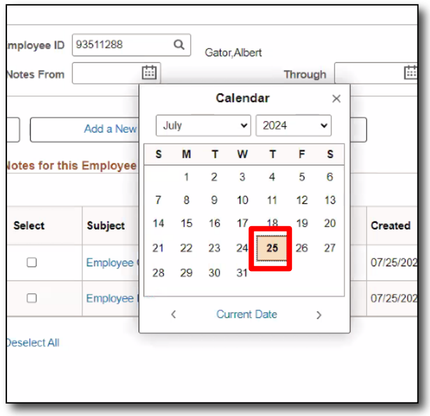
3. All of your direct reports will appear. Click on the **UFID number** of the employee you would like to write about.



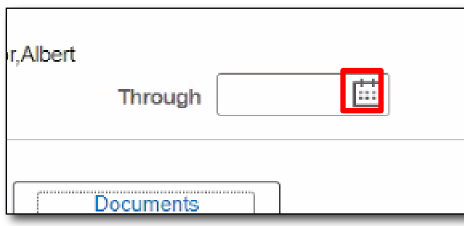
4. Every note that you have written about the selected employee will appear. To search for a Note by **Created** date, click on the Notes From **calendar icon**.



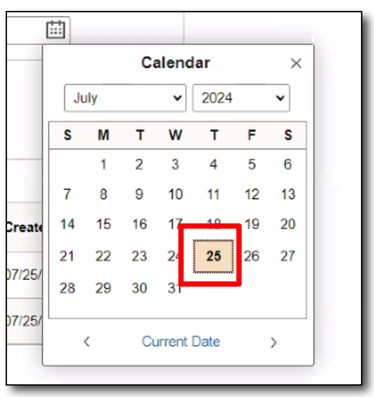
5. Select the **first date** that you would like displayed in your search.



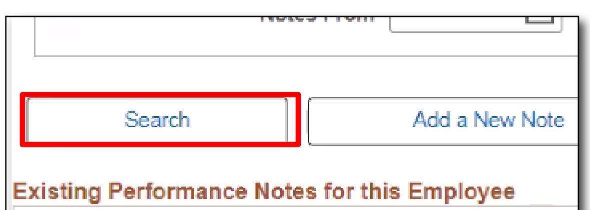
6. Click on the Through **calendar icon**.



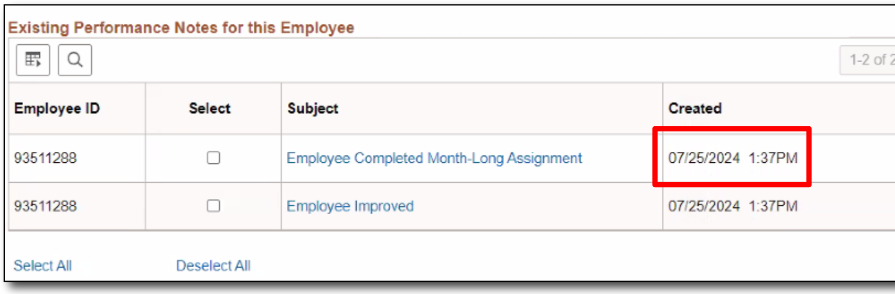
7. Select the **end date** that you would like displayed in your search.



8. Click the **Search** button.

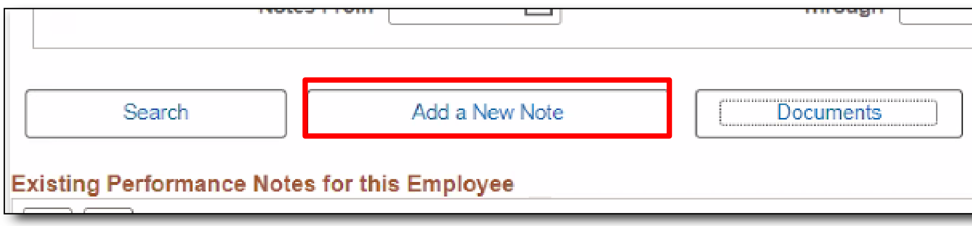


9. Only the Notes created within your chosen date range will appear.

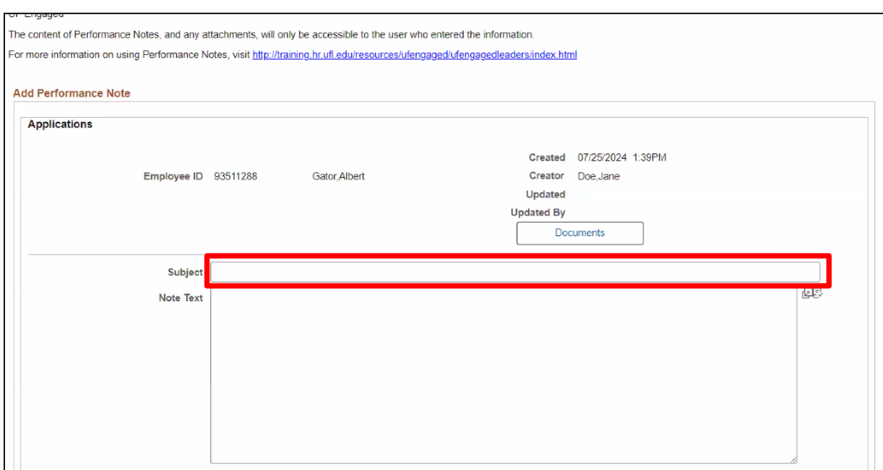


Adding a New Note

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



2. 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.

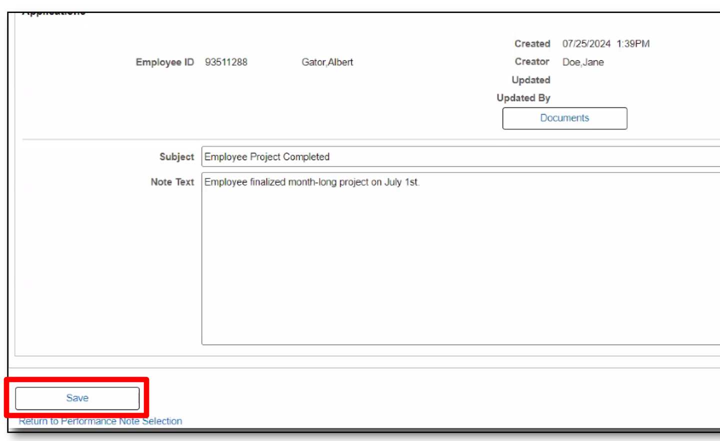


3. In the **Note Text** section, enter specific details about the employee's performance.

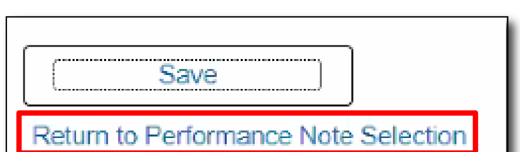
It is recommended that in the **Note Text** section you include any and all relevant information about the **Subject**. You can enter as much or as little as you would like. This will be a reference tool for when you are creating your employee's Check-in. Some examples of interactions that might be recorded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

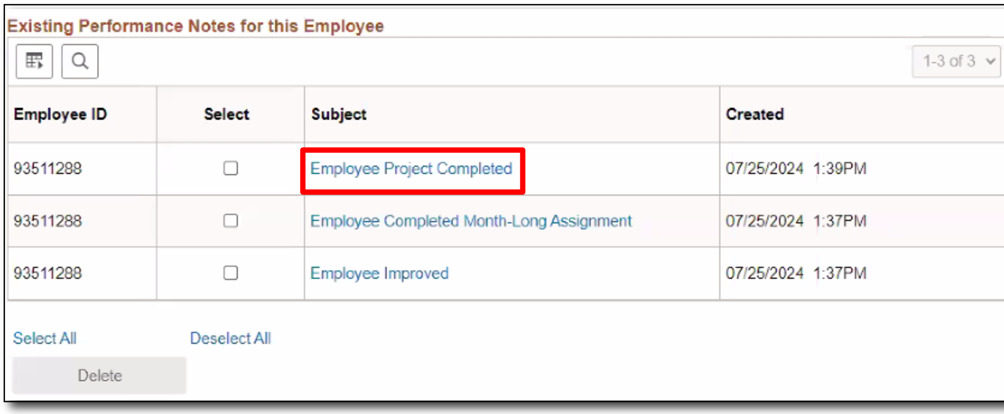


5. Click the **Return to Performance Note Selection** link. The Note you just created is listed on the Performance Notes page by the Subject name

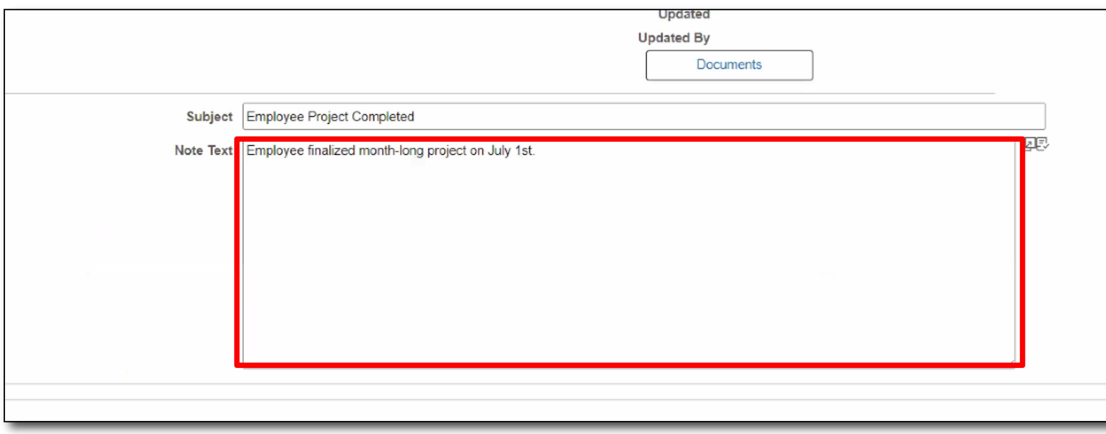


ADDING TEXT OR EDITING AN EXISTING PERFORMANCE NOTE

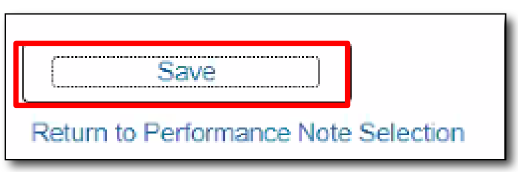
1. Click on any **Performance Note** to add text or edit the note.



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

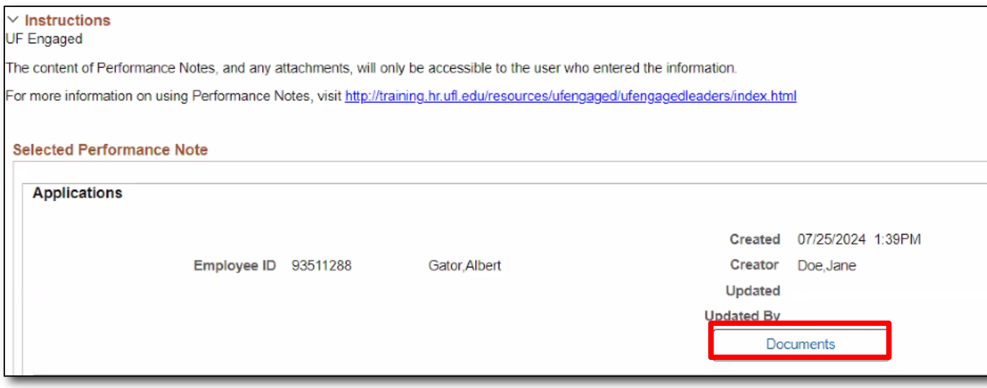


3. Click the **Save** button.

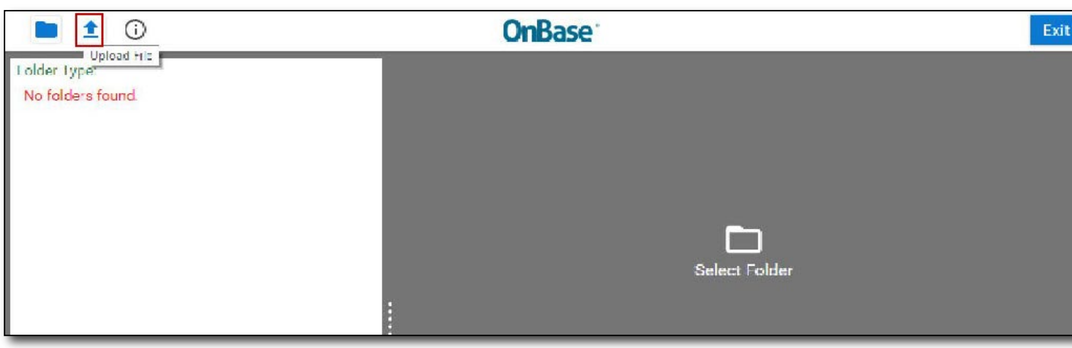


Upload Documents to a Note

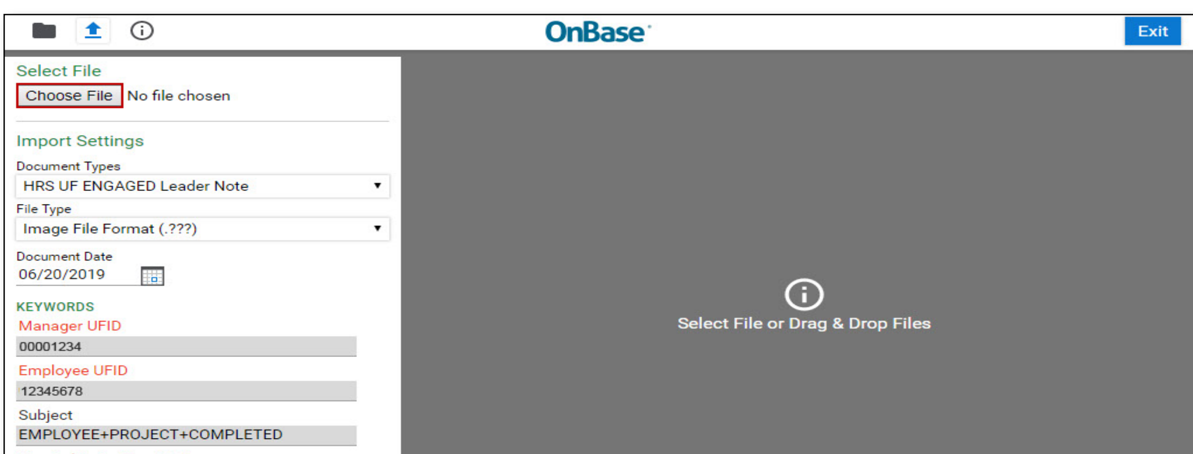
1. In addition to saving text, you can upload relevant Documents. While on the **Add/Update Notes** page, click on the **Documents** button. Please note that while you may choose to upload documents as a memory aid and/or for your reference when completing your UF Engaged Check-Ins, you will not be able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



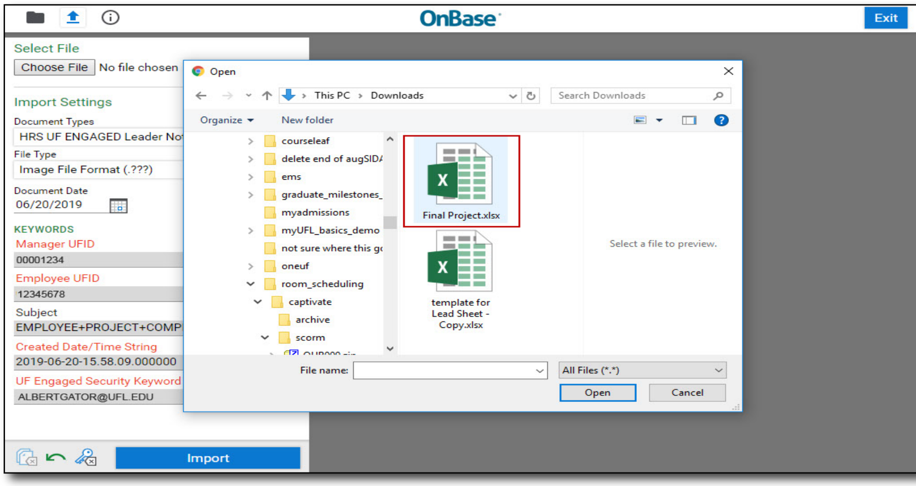
2. Document storage is facilitated through OnBase. Click the highlighted **Upload** icon.



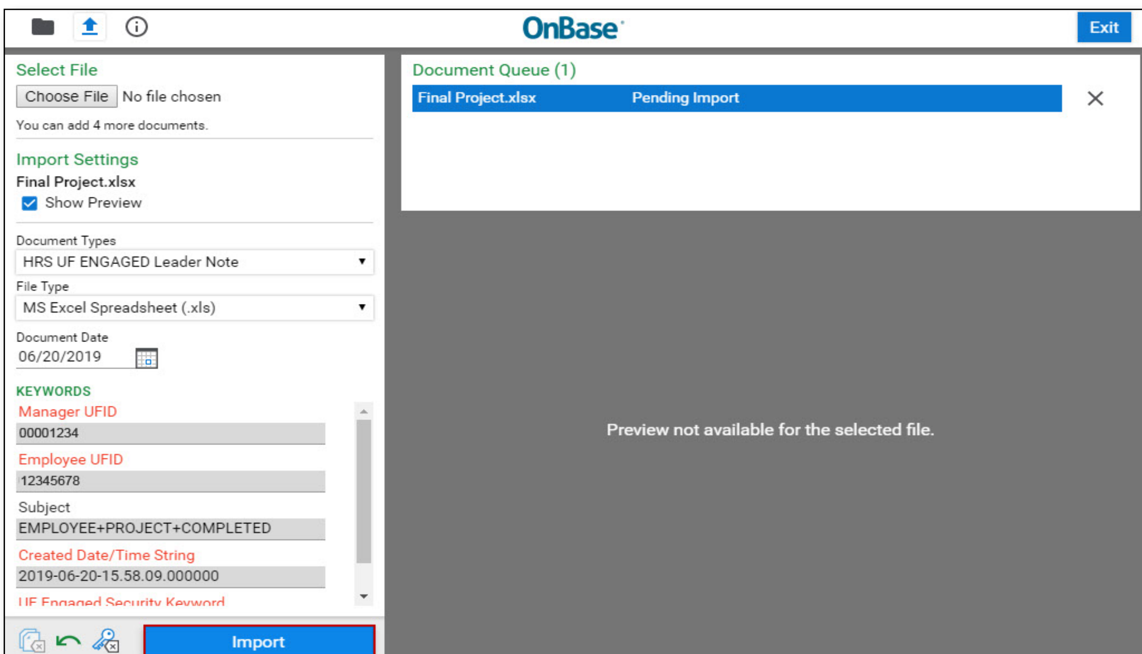
3. Click the **Choose File** button.



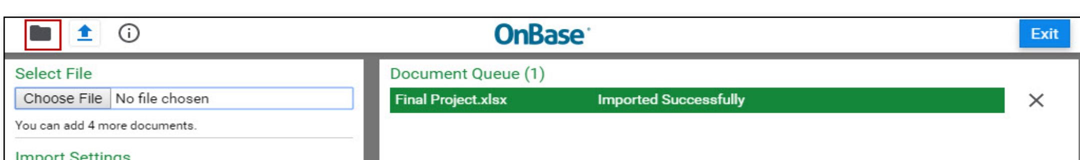
4. Navigate to and select the **file** you would like to upload.



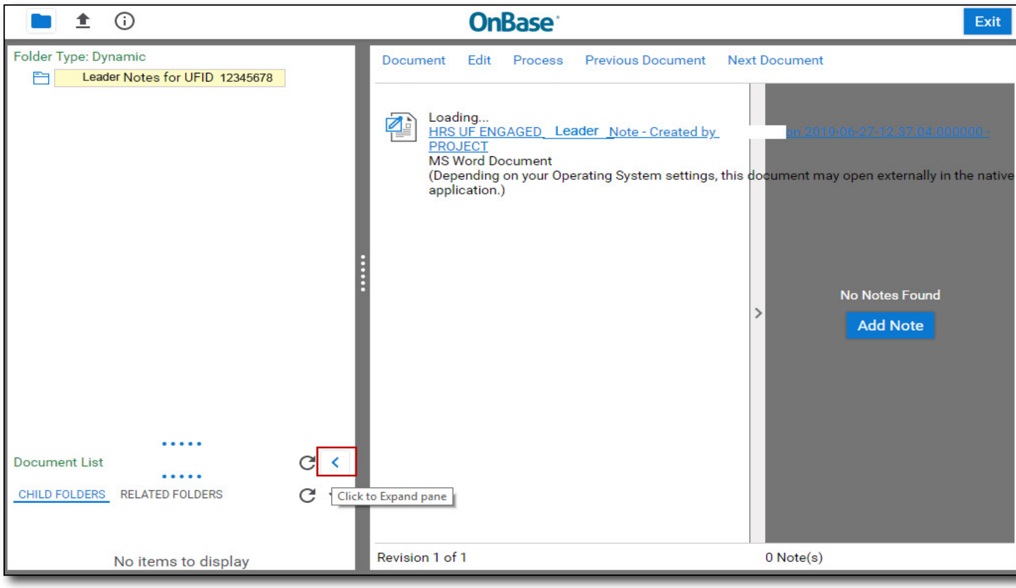
5. Note that in the Document Queue, it states “Pending Import”. Click the **Import** button.



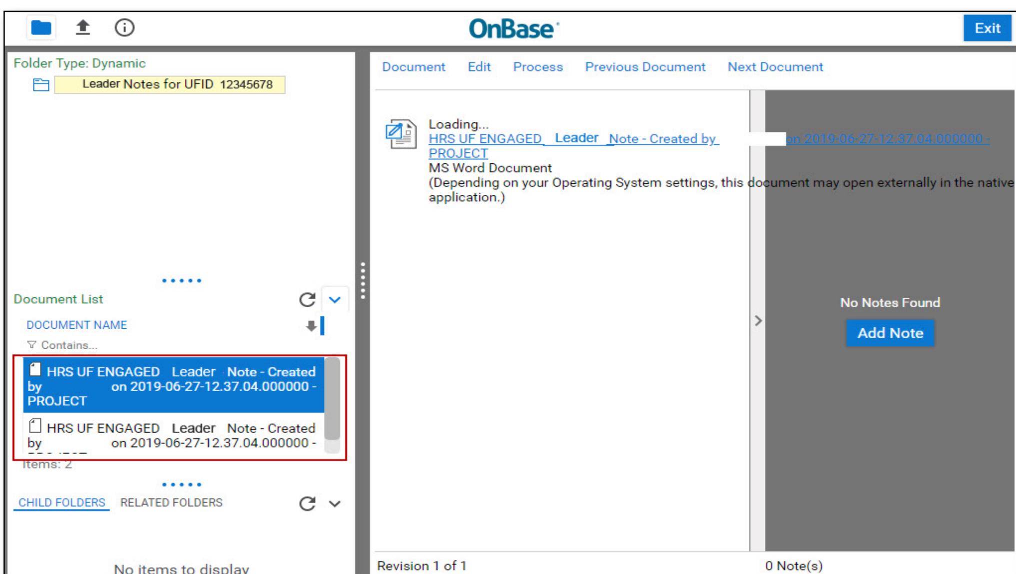
6. Note that in the Document Queue, the document shows as “Imported Successfully”. To see all imported documents for this note, click the red highlighted **Folder** icon.



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.

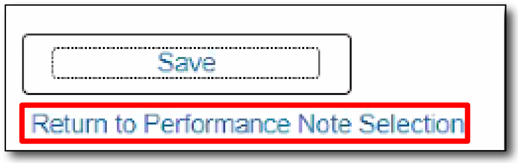


8. Your documents will appear in the **Document List**. Depending on how many documents you have uploaded, you may need to scroll down to view them all.



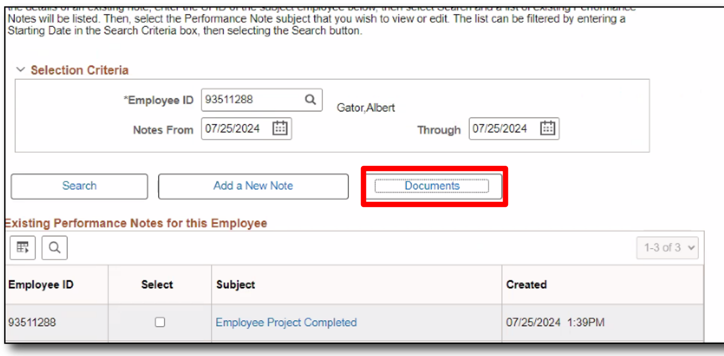
9. To return to the Note, click the highlighted **Exit** button.

10. 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.

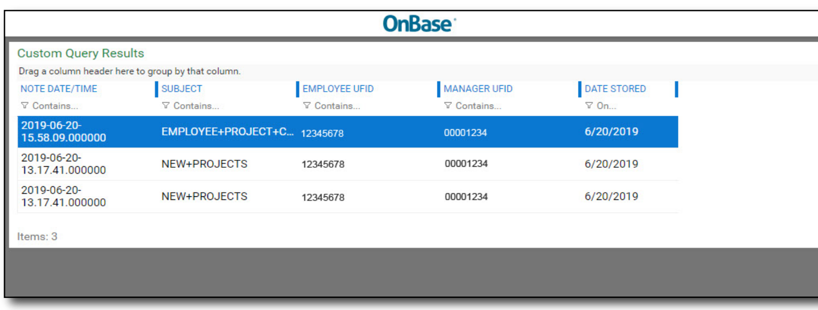


Viewing All Uploads for an Employee

1. 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.

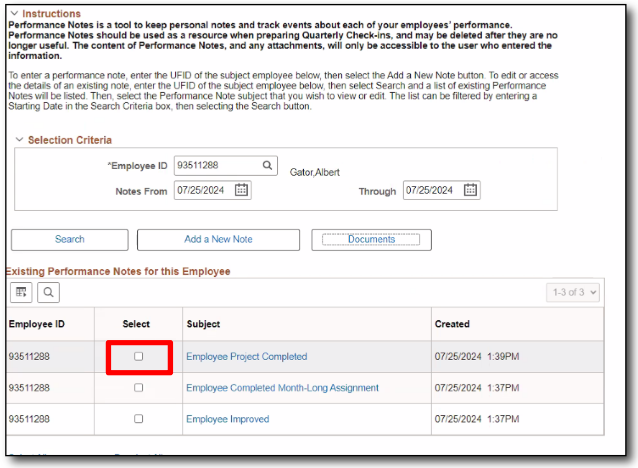


2. By clicking any **Document**, you will download it to your computer.

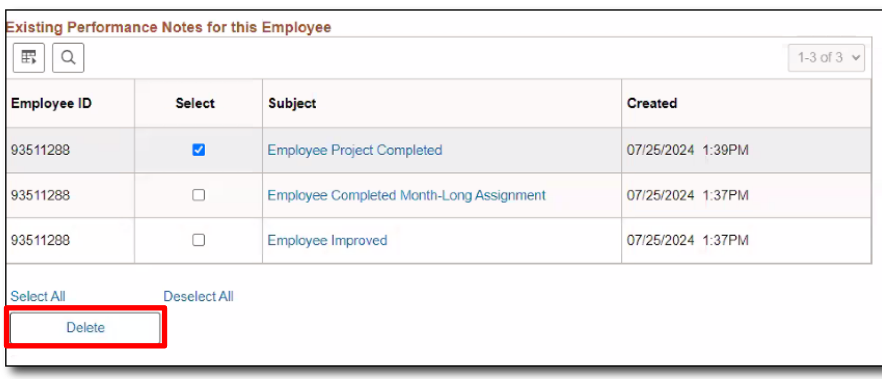


Deleting a Note

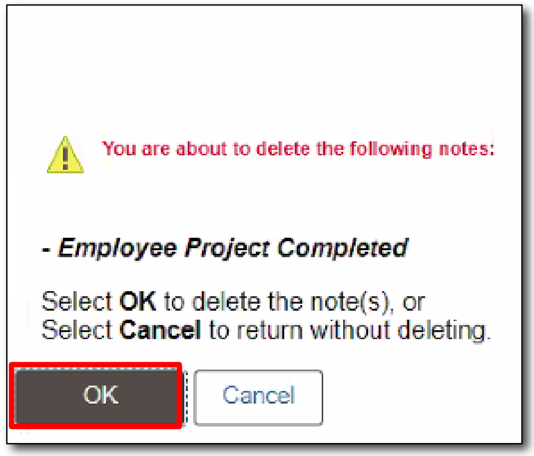
3. If you ever need to delete a Note, click on the **check box** next to the note.



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



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



6. Your note has been deleted.