Performance Notes for Employees

The following instructions will walk you through how to use the Performance Notes tool as a UF employee. Entering Performance Notes is a way to keep notes about your performance and track specific events between Check-ins. These notes are for your reference and can only be accessed by you. There is no requirement to use Performance Notes.

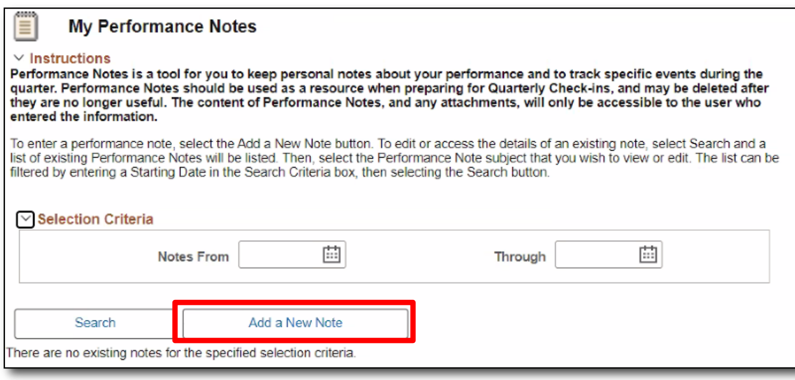
Navigation

Login into myUFL and navigate to:

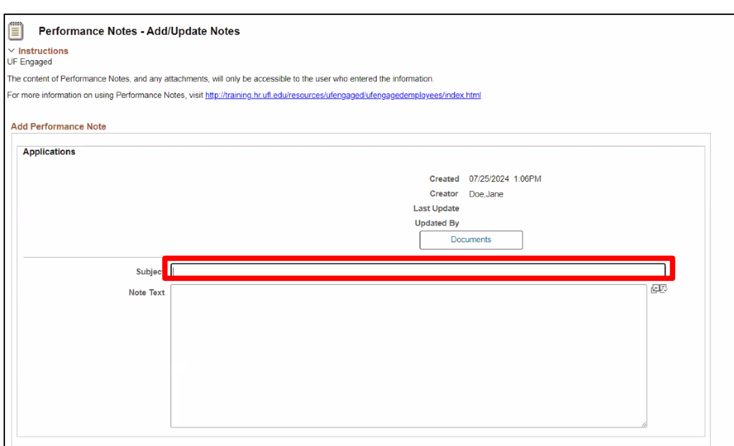
Nav Bar > Main Menu > Human Resources > Self Service > UF Engaged > Performance Notes

Adding a New Performance Note

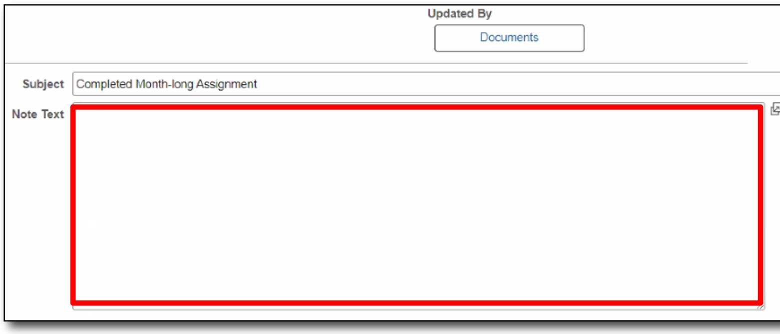
1. Click **Add a New Note** button.



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.



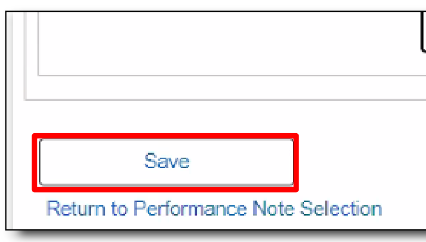
3. In the **Note Text** section, enter specific details about your performance, successes, and events.



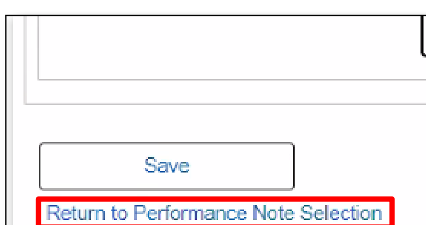
It is recommended that in the **Note Text** section you include any and all relevant information about the **Subject**. You can enter as much or as little as you would like, as long as it will help you remember the achievement or interaction as you complete the Check-in Self-Assessment. Some examples of interactions that might be recorded include:

- Large projects that you have completed
- Descriptions of team projects that you participated on
- Positive conversations held between you and leaders, colleagues, and customers
- Accomplishments or awards that you have received

4. Click the **Save** button.

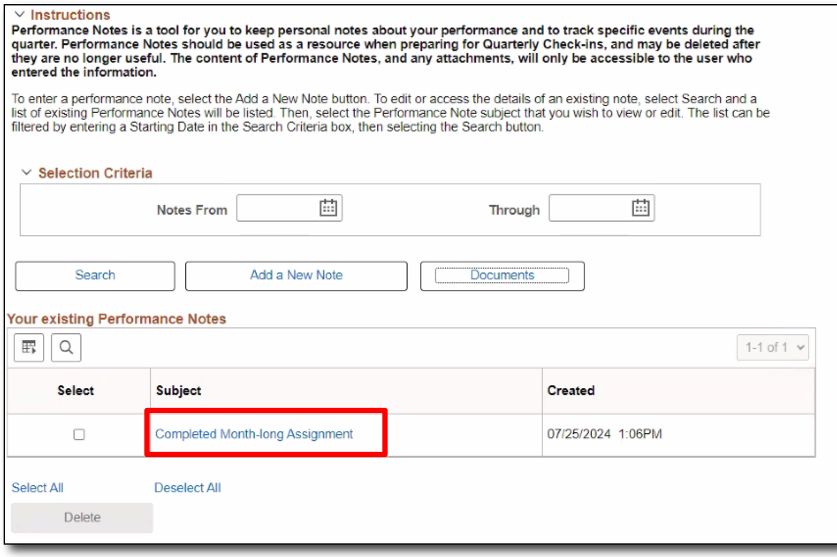


5. Click the **Return to Performance Note Selection** link. Notice that the note you just created is listed on **My Performance Notes** by the **Subject** name.

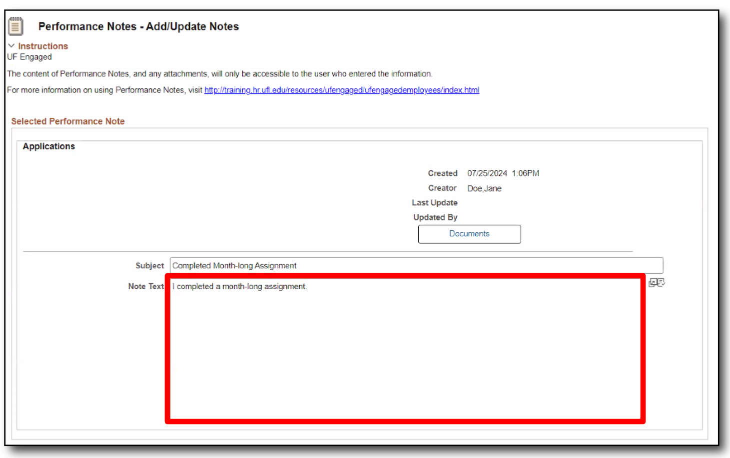


Adding Text or Editing an Existing Performance Note

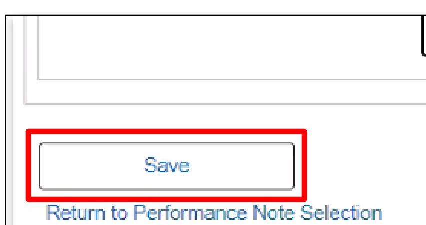
1. Click on any **Performance Note** to add text or edit the note.



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



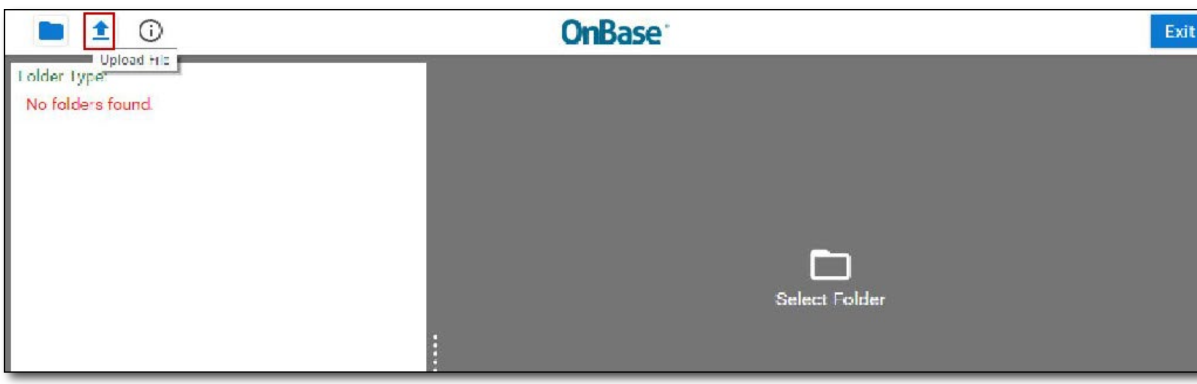
3. Click the **Save** button.



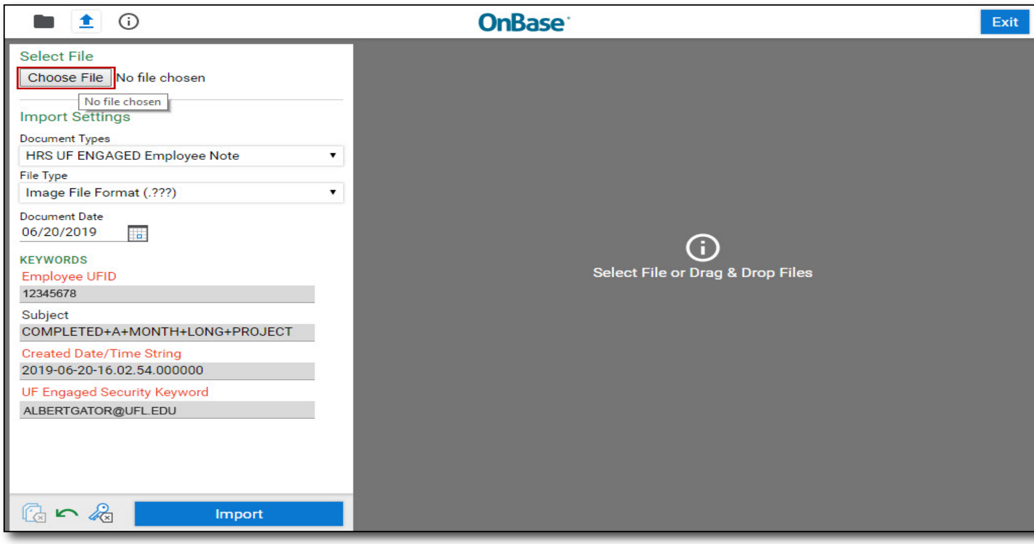
UPLOAD DOCUMENTS TO A NOTE

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.

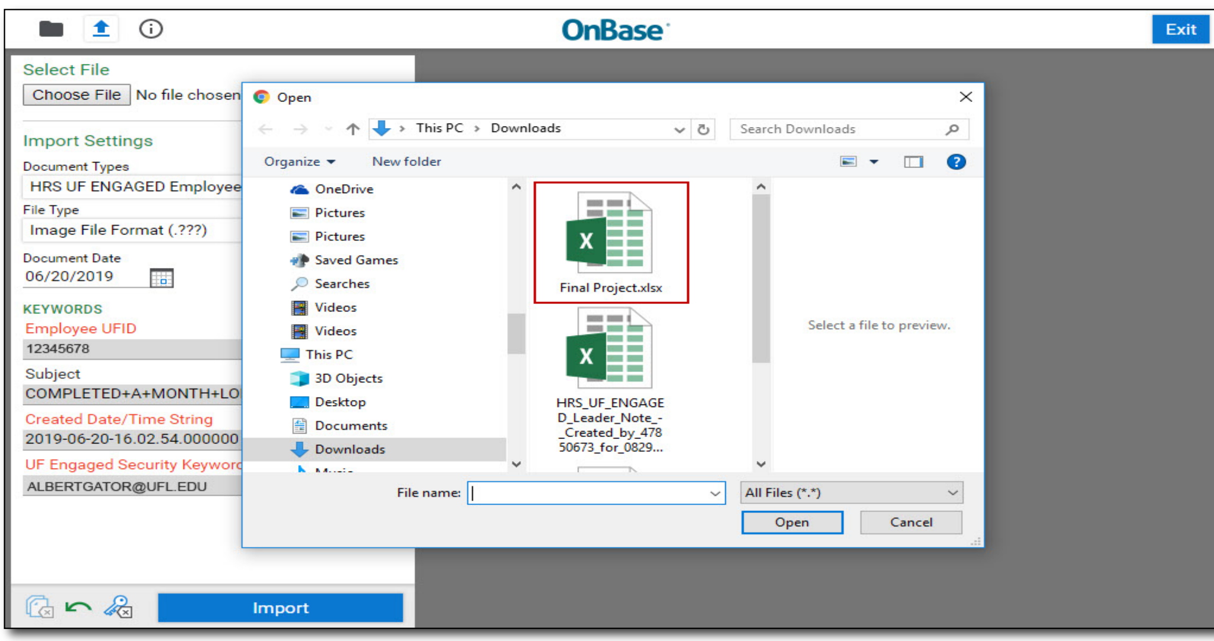
2. Document storage is facilitated through OnBase. Click the highlighted **Upload** icon.



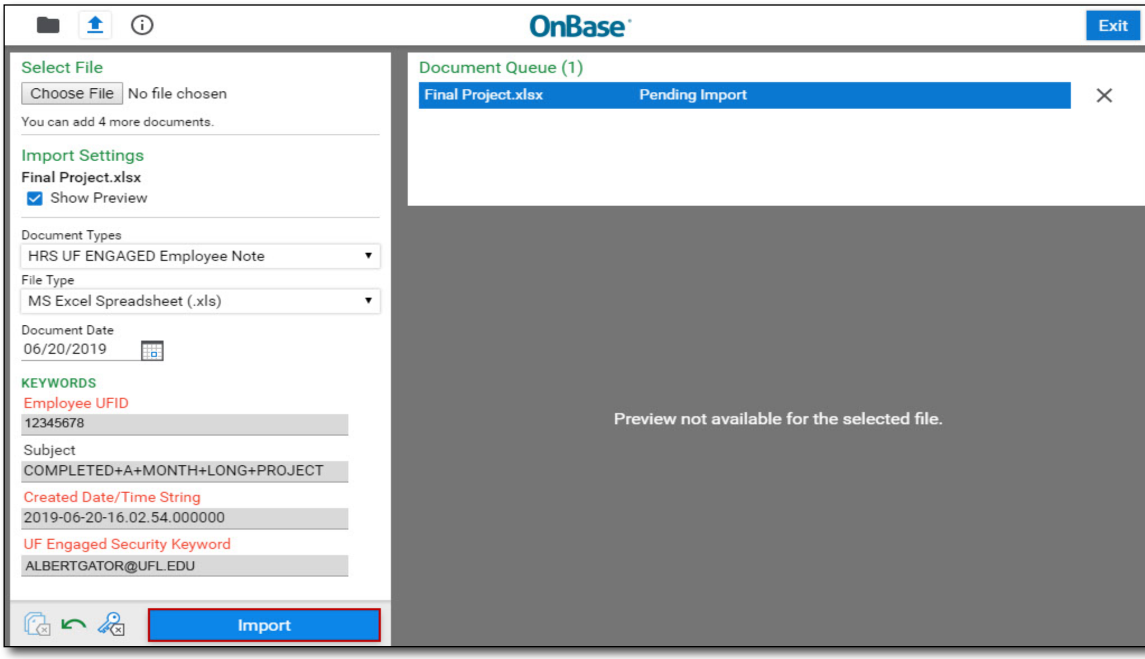
3. Click the **Choose File** button.



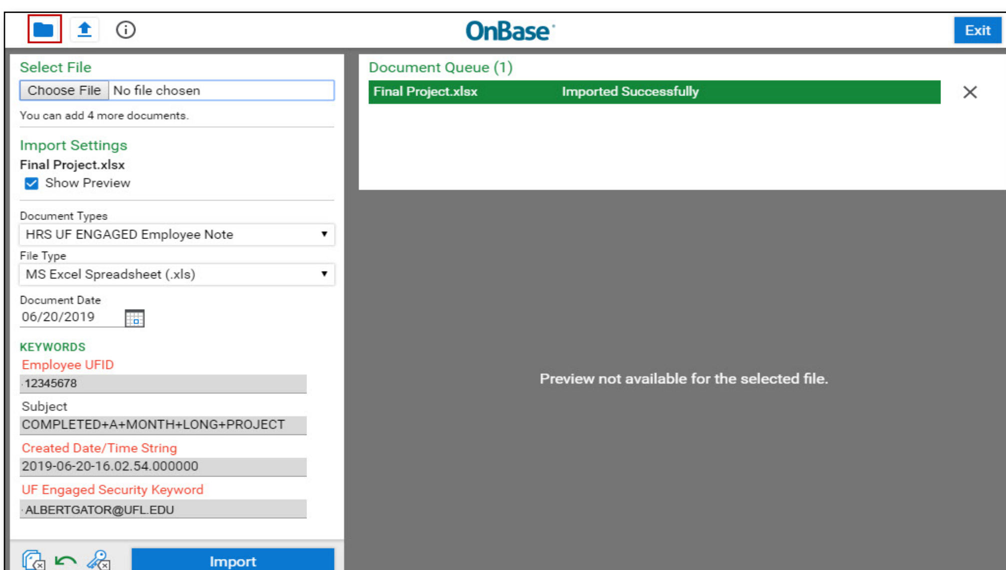
4. Navigate to and select the **file** you would like to upload.



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

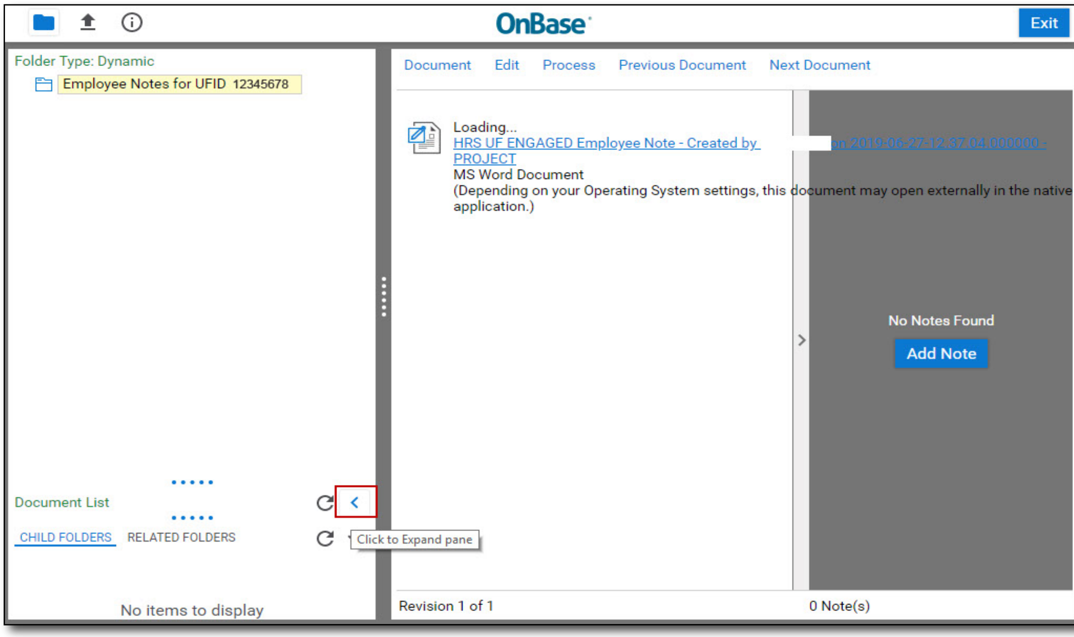


6. Note that in the Document Queue, the document shows as “Imported Successfully”. To see all imported documents for this note, click the red highlighted **Folder** icon.

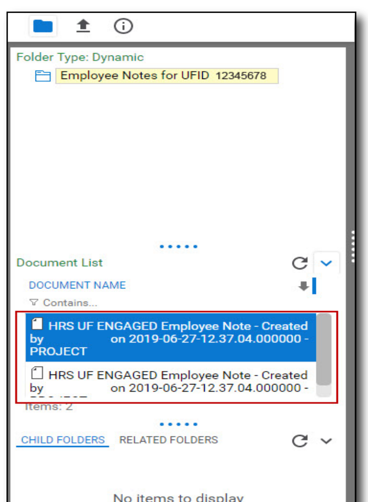


7. You can see all of the documents that you have uploaded to this Note in the folder page. Click the **arrow** to

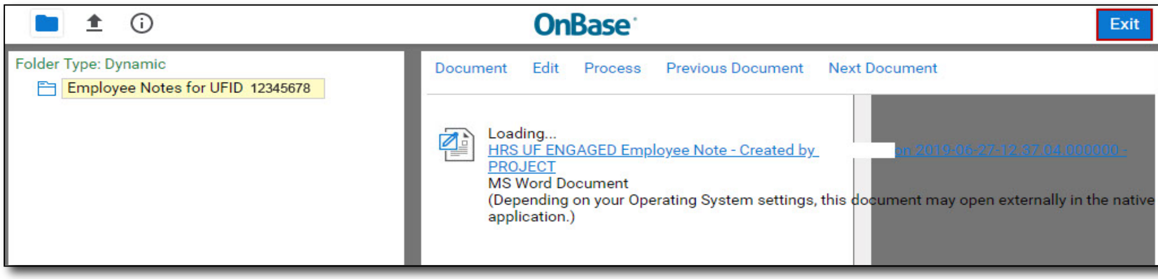
display them.



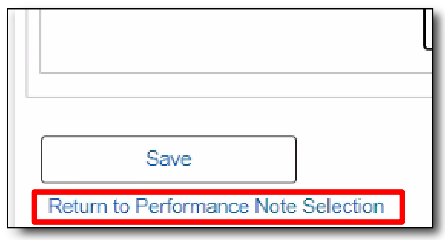
8. Your documents will appear in the **Document List**. Depending on how many documents you have uploaded, you may need to scroll down to view them all.



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

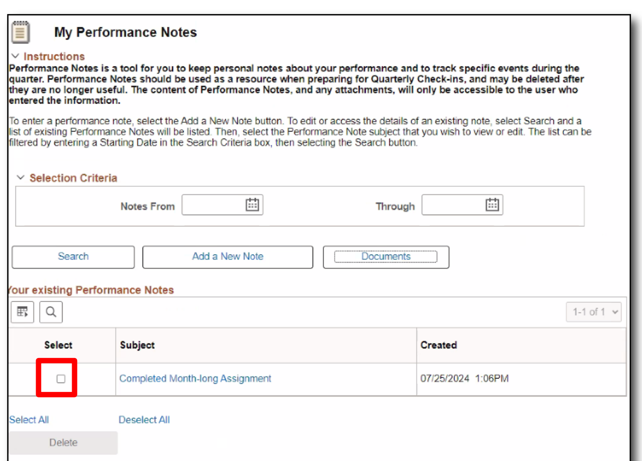


10. At this point you can either enter more text and **Save** or return to the My Performance Notes menu by clicking the **Return to Performance Note Selection** link.

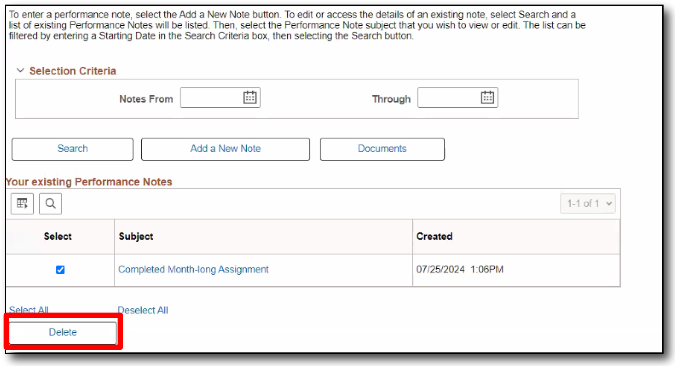


Deleting a Note

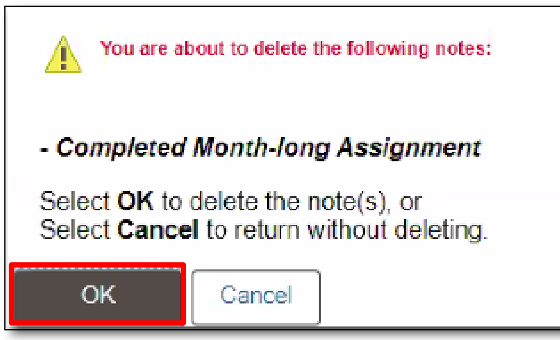
1. If you ever need to delete a Note, click on the **check box** next to the note.



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



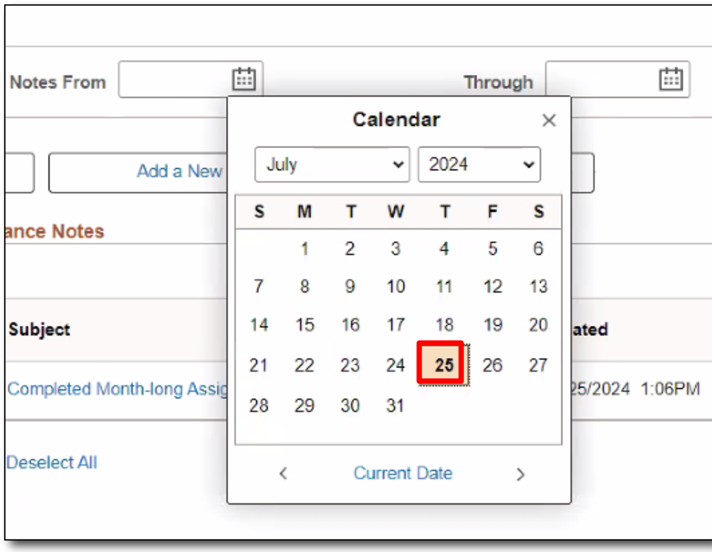
3. Confirm by clicking the **OK** button.



Searching for a Note

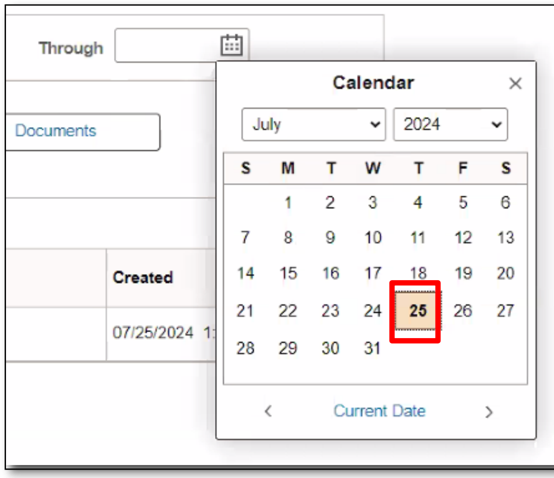
1. If you have a number of Notes saved, you can search for Notes by **Created** date or date range. Click on the Notes From **calendar icon**.

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

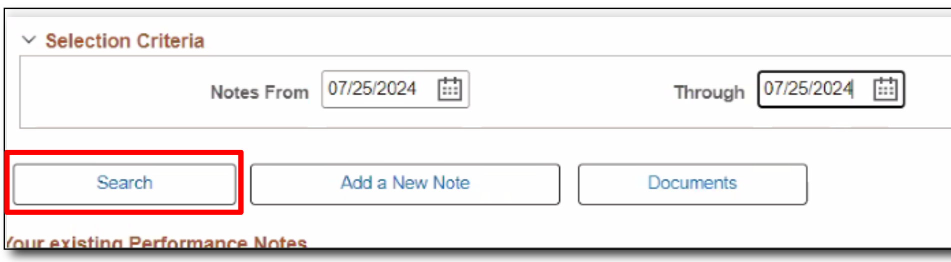


3. Click on the Through **calendar icon**.

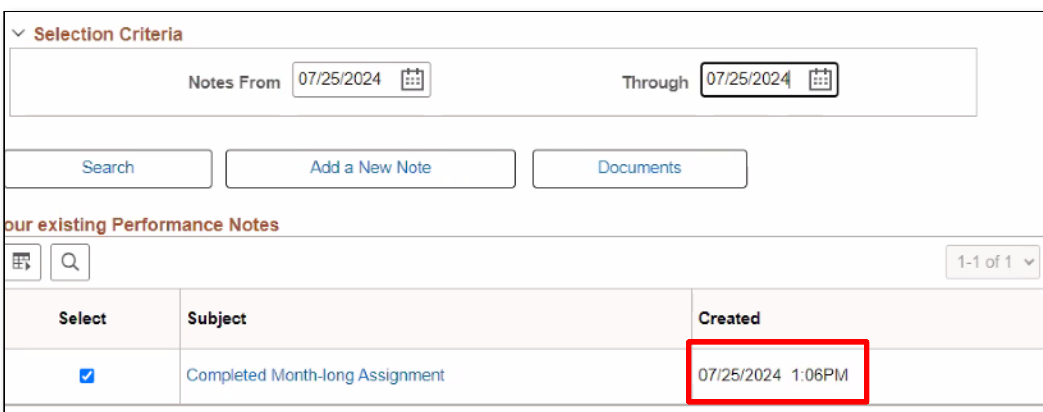
4. Select the **end date** that you would like displayed in your search.



5. Click the **Search** button.

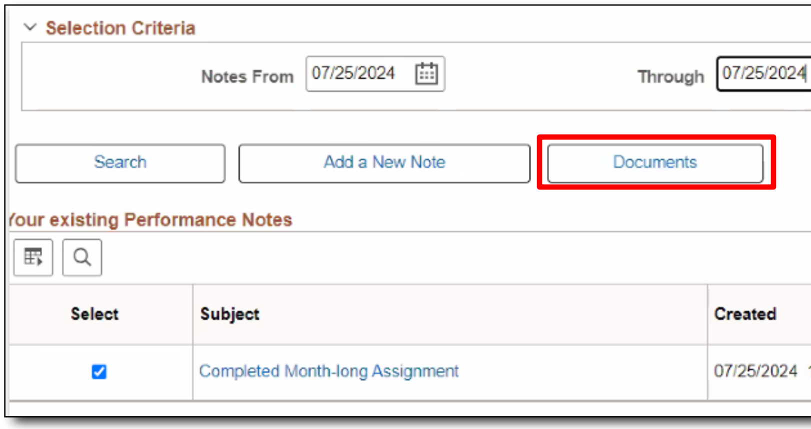


6. Only the Notes created within your chosen date range will appear.



Viewing All Uploaded Documents

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



2. If you click any of these **Documents**, you will download them.