

## 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.

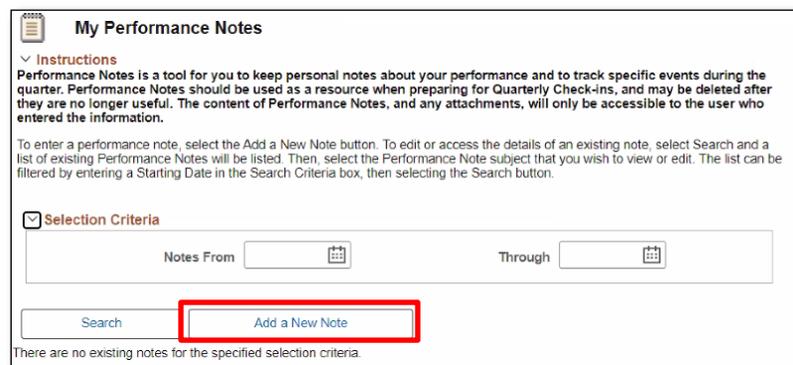
### NAVIGATION

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.



**My Performance Notes**

Instructions  
Performance Notes is a tool for you to keep personal notes about your performance and to track specific events during the quarter. Performance Notes should be used as a resource when preparing for 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, select the Add a New Note button. To edit or access the details of an existing note, 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

Notes From [ ] Through [ ]

Search [ ] **Add a New Note**

There are no existing notes for the specified selection criteria.

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.



**Performance Notes - Add/Update Notes**

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.tr.ufl.edu/resources/ufengaged/ufengagedemployeees/index.html>

Add Performance Note

Applications

Created 07/25/2024 1:08PM  
Creator Doe.Jane  
Last Update  
Updated By  
Documents

Subject [ ]

Note Text [ ]

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

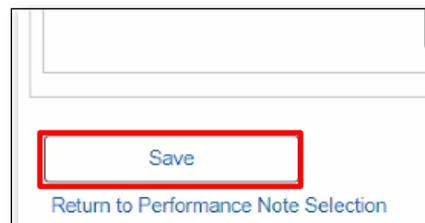


A screenshot of a web form for entering performance notes. At the top right, there is a field labeled "Updated By" with the value "Documents". Below this is a "Subject" field containing the text "Completed Month-long Assignment". The "Note Text" field is a large, empty text area, which is highlighted with a red rectangular border. To the right of the text area is a small "G" icon.

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:

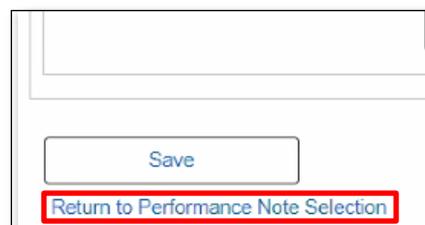
- Large projects that you have completed
- Descriptions of team projects that you participated on
- Positive conversations held between you and leaders, colleagues, and customers
- Accomplishments or awards that you have received

4. Click the **Save** button.



A screenshot of the bottom portion of the form. A blue "Save" button is highlighted with a red rectangular border. Below the button is a blue link that reads "Return to Performance Note Selection".

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.



A screenshot of the bottom portion of the form, similar to the previous one. The blue "Save" button is visible. The blue link "Return to Performance Note Selection" is highlighted with a red rectangular border.

## ADDING TEXT OR EDITING AN EXISTING PERFORMANCE NOTE

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

**Instructions**  
Performance Notes is a tool for you to keep personal notes about your performance and to track specific events during the quarter. Performance Notes should be used as a resource when preparing for 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, select the Add a New Note button. To edit or access the details of an existing note, 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**

Notes From  Through

**Your existing Performance Notes**

Select	Subject	Created
<input type="checkbox"/>	Completed Month-long Assignment	07/25/2024 1:06PM

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

**Performance Notes - Add/Update Notes**

**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/ufengagedemployees/index.html>

**Selected Performance Note**

**Applications**

Created: 07/25/2024 1:06PM  
Creator: Doe, Jane  
Last Update  
Updated By:

Subject: Completed Month-long Assignment

Note Text:

3. Click the **Save** button.

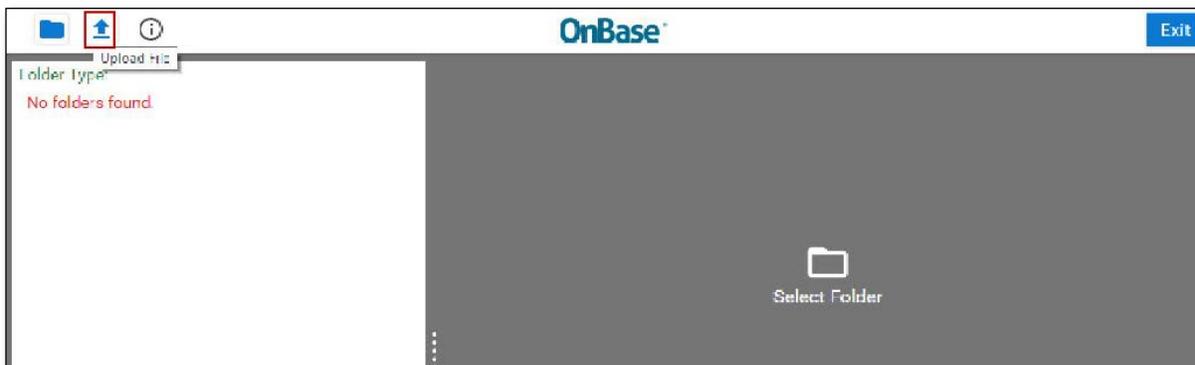
[Return to Performance Note Selection](#)

## UPLOAD DOCUMENTS TO A NOTE

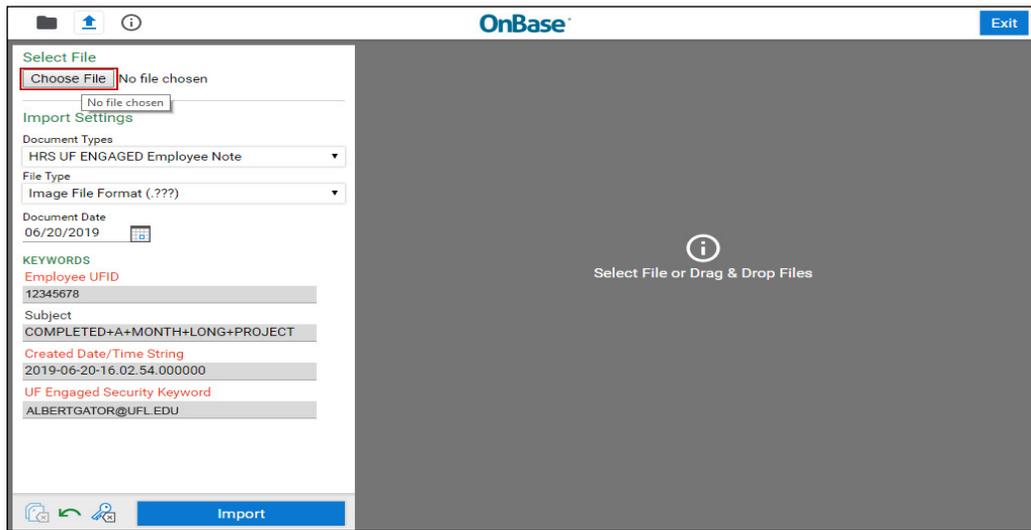
1. In addition to saving text, you can upload relevant Documents. While on the **Add/Update Notes** page, click on the **Documents** button. Please note that while you may choose to upload documents as a memory aid and/or for your reference when completing your UF Engaged Check-Ins, you will not be able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



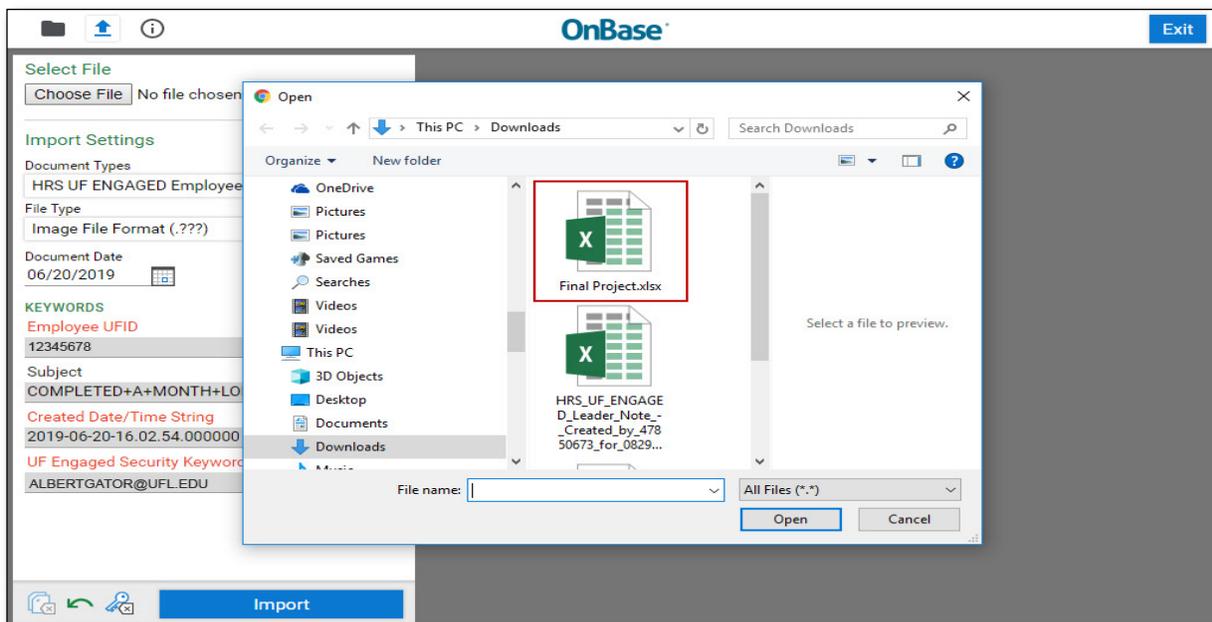
2. Document storage is facilitated through OnBase. Click the highlighted **Upload** icon.



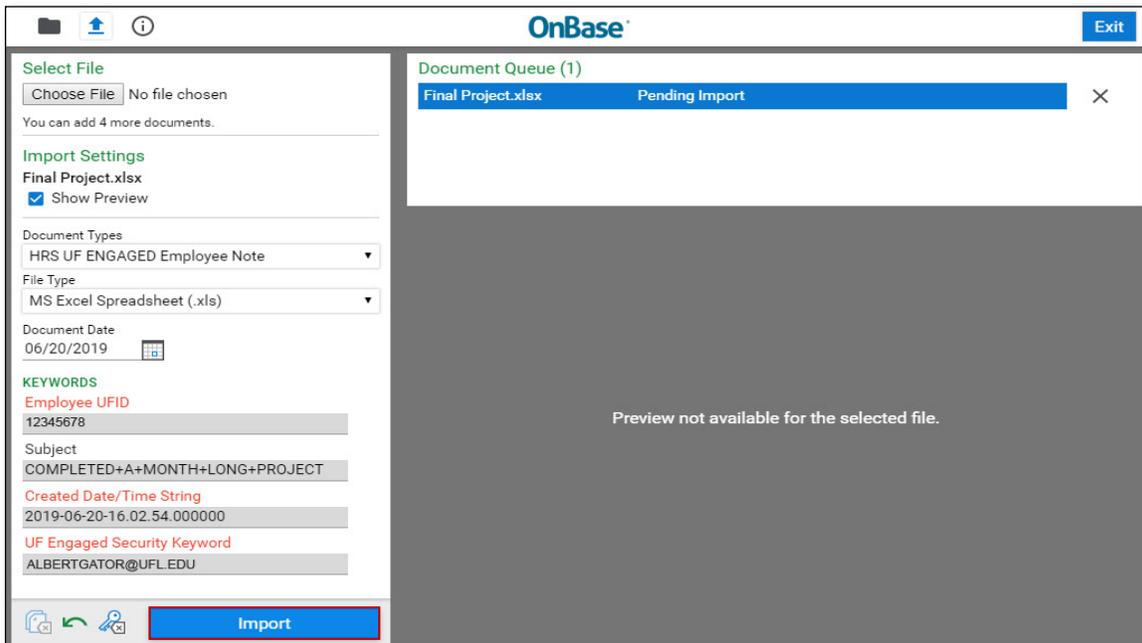
3. Click the **Choose File** button.



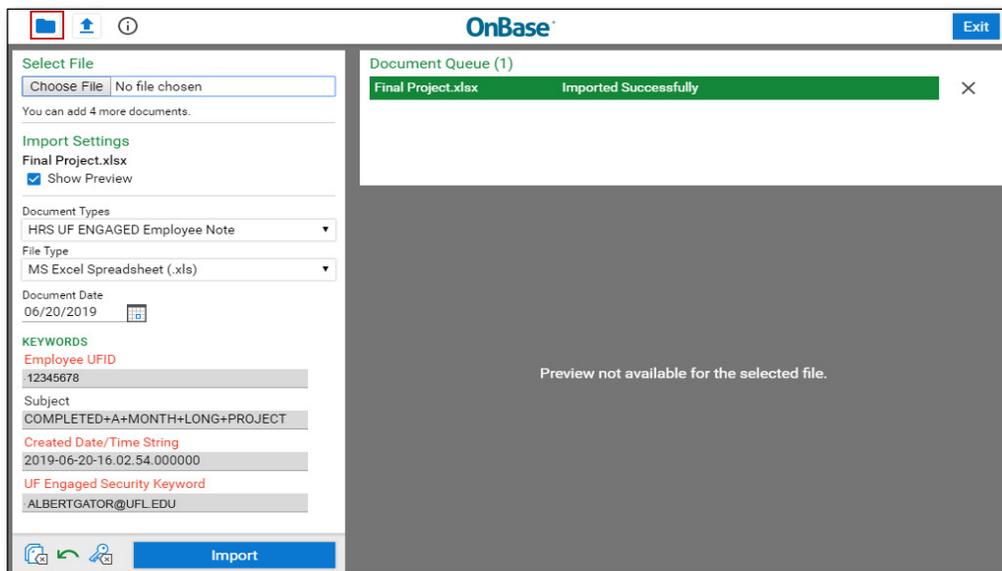
4. Navigate to and select the **file** you would like to upload.



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

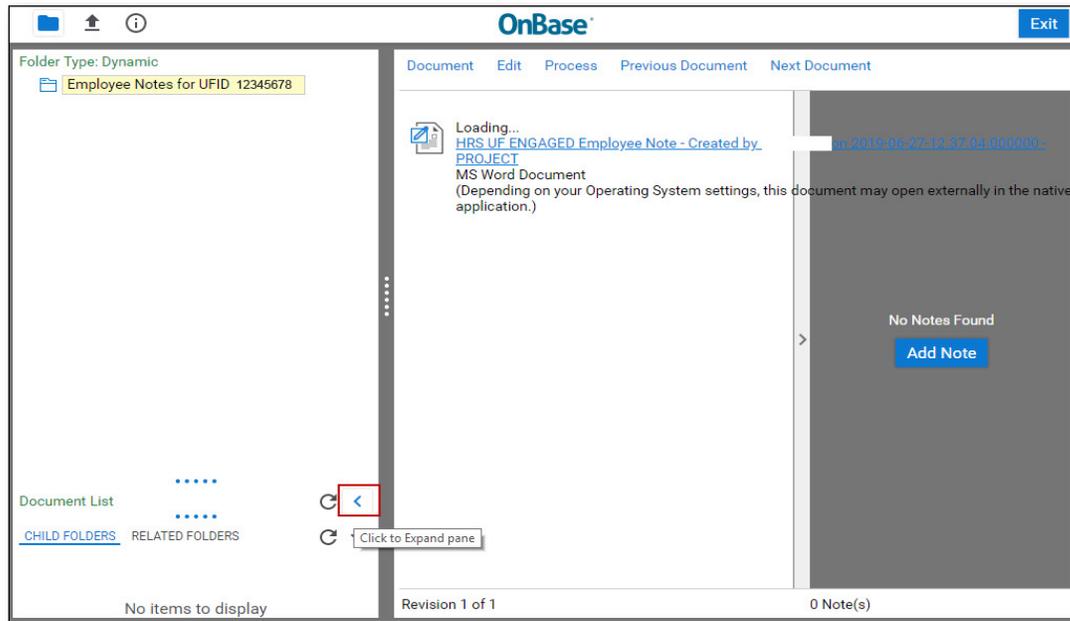


- Note that in the Document Queue, the document shows as “Imported Successfully”. To see all imported documents for this note, click the red highlighted **Folder** icon.

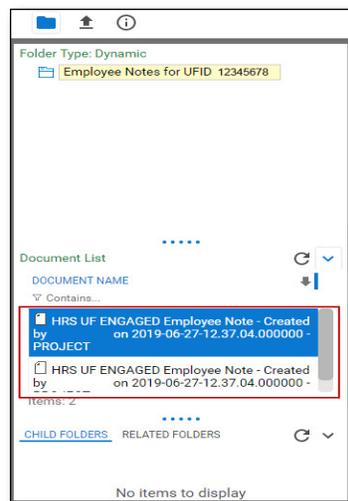


- You can see all of the documents that you have uploaded to this Note in the folder page. Click the **arrow** to

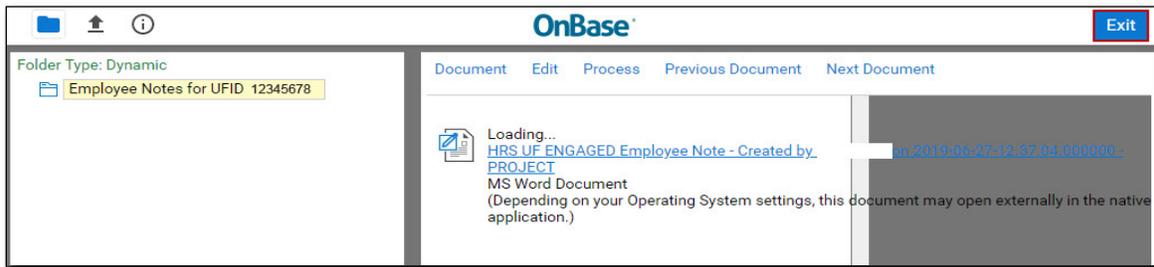
display them.



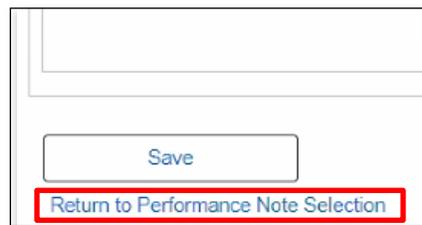
- Your documents will appear in the **Document List**. Depending on how many documents you have uploaded, you may need to scroll down to view them all.



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

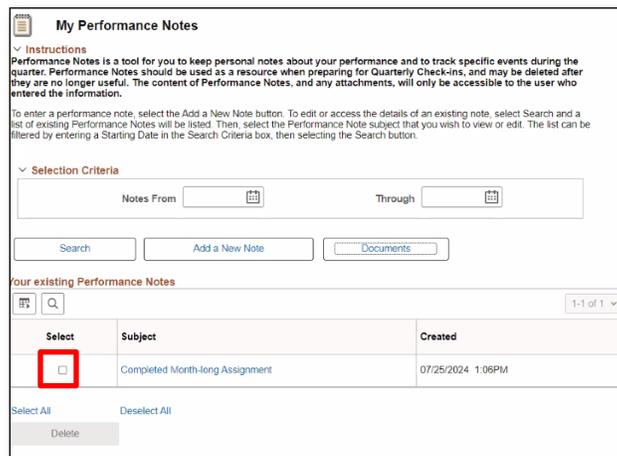


- At this point you can either enter more text and **Save** or return to the My Performance Notes menu by clicking the **Return to Performance Note Selection** link.

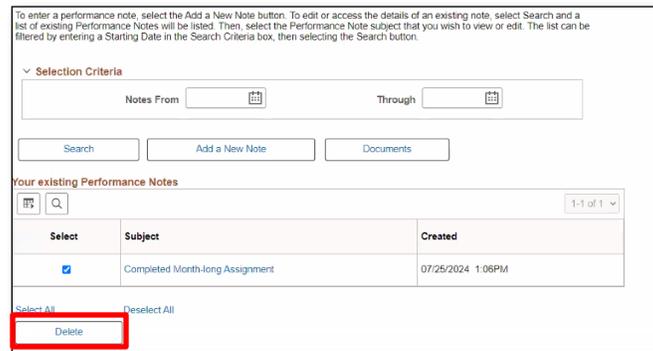


## DELETING A NOTE

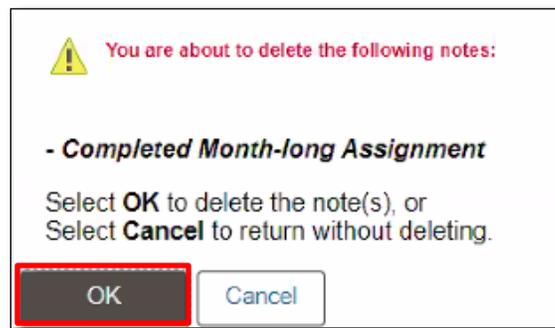
- If you ever need to delete a Note, click on the **check box** next to the note.



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



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

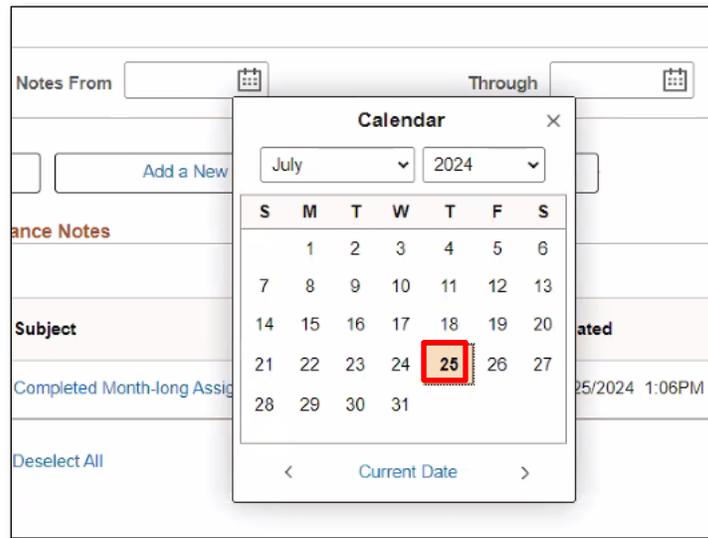


### SEARCHING FOR A NOTE

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**.



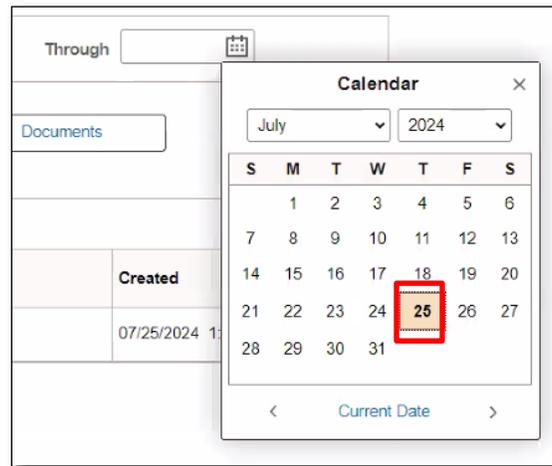
2. Select the **first date** that you would like displayed in your search.



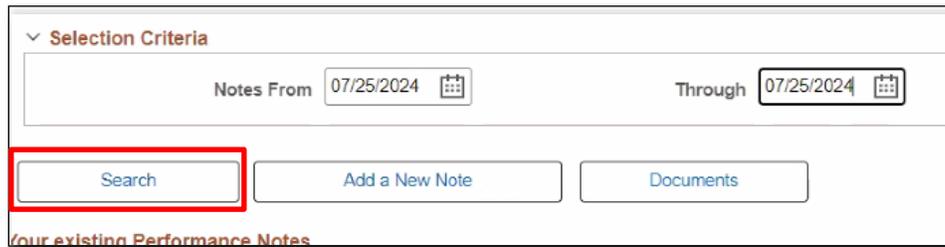
3. Click on the Through **calendar icon**.



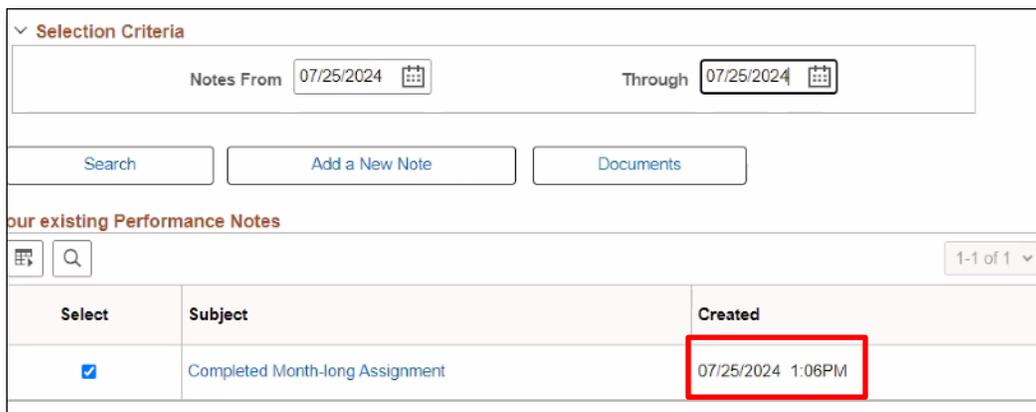
4. Select the **end date** that you would like displayed in your search.



5. Click the **Search** button.

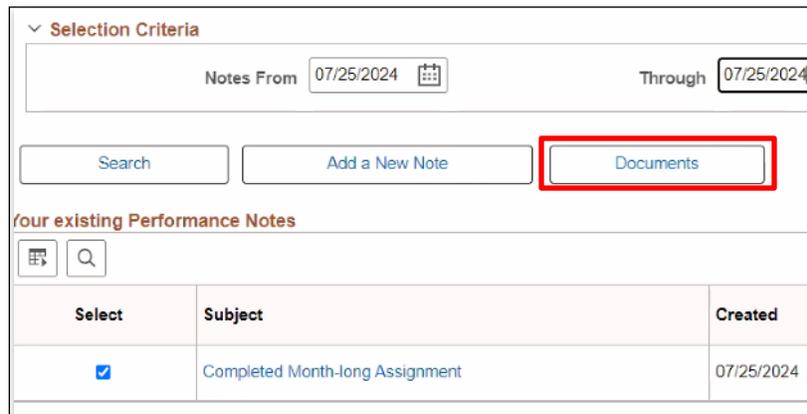


6. Only the Notes created within your chosen date range will appear.



## VIEWING ALL UPLOADED DOCUMENTS

- 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.



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

