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.

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

4. Click the **Search** button.

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

![Image of calendar with date selection]

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

![Image of calendar with through date selection]

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

![Image of calendar with end date selection]

9. Click the **Search** button.
10. Only the Notes created within your chosen date range will appear.

![Image of performance notes interface]

**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.

![Image of add/update notes interface]
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.

![Performance Notes - Add/Update Notes](image1)

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

![OnBase - Select Folder](image2)

3. Click the Choose File button.

![OnBase - Choose File](image3)
4. Navigate to and select the **file** you would like to upload.

![Image of OnBase interface showing file selection and import options]

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

![Image of Document Queue with “Pending Import” status]

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.

![Image of Document Queue showing “Imported Successfully” status and Folder icon]

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**Note:** Please ensure that the documentation provided accurately reflects the steps and process for uploading and handling files within the OnBase system. Always consult with the system administrator or technical support for any software-specific instructions that may differ from the general guidance given.
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.