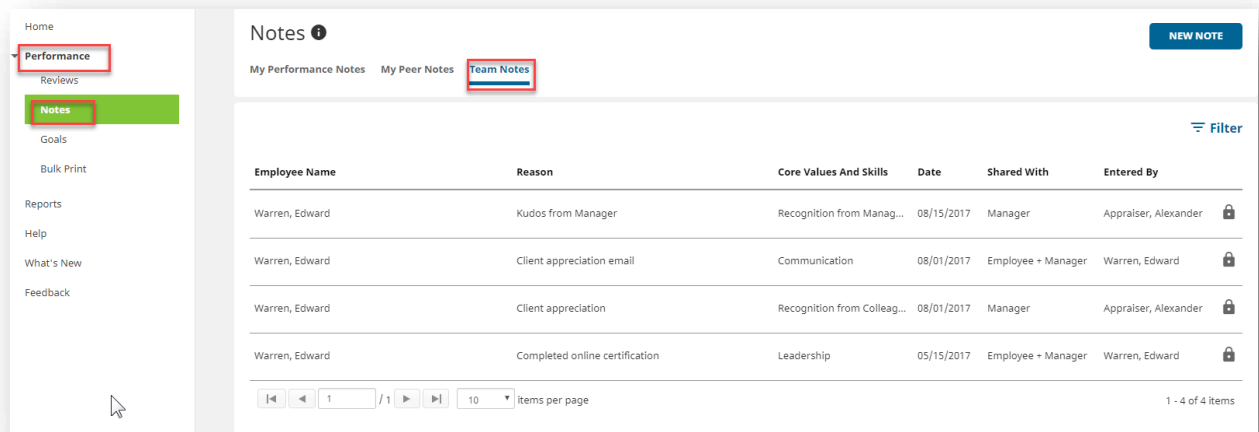


Quick Guide - Adding Performance Notes for Your Employees

Performance Notes are a great way to quickly note events that have occurred throughout the year for your employees, such as recognition or coaching. These notes can be available to view in your performance review if the date of the note falls within the period of performance being reviewed.

Navigation

Go to **Performance** in the left-hand menu and click on the **Notes**. To access your team's notes, click on **Team Notes**.



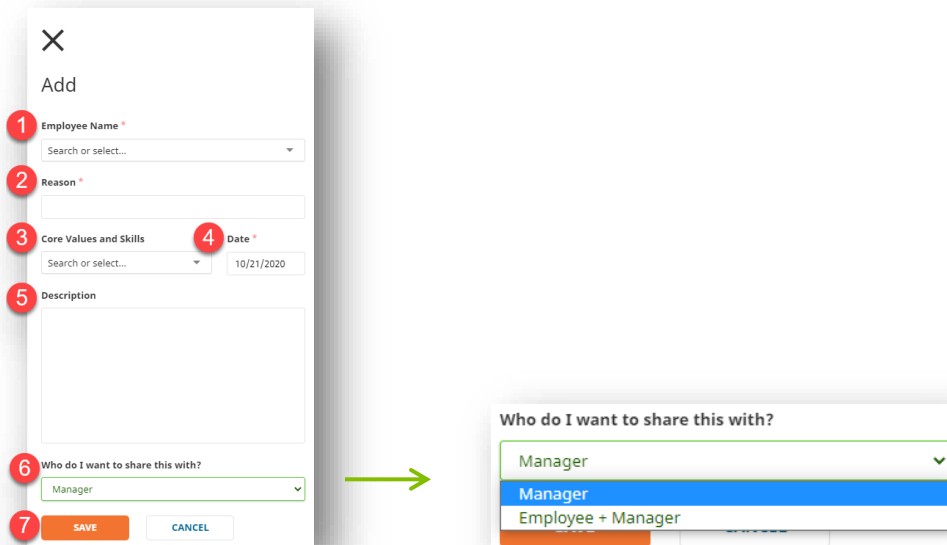
The screenshot displays the 'Notes' section of the Insperity system. In the left-hand navigation menu, 'Performance' and 'Notes' are highlighted. The main content area shows a table of performance notes for 'Warren, Edward'. The table has columns for Employee Name, Reason, Core Values And Skills, Date, Shared With, and Entered By. A 'NEW NOTE' button is visible in the top right corner.

Employee Name	Reason	Core Values And Skills	Date	Shared With	Entered By
Warren, Edward	Kudos from Manager	Recognition from Manag...	08/15/2017	Manager	Appraiser, Alexander
Warren, Edward	Client appreciation email	Communication	08/01/2017	Employee + Manager	Warren, Edward
Warren, Edward	Client appreciation	Recognition from Colleag...	08/01/2017	Manager	Appraiser, Alexander
Warren, Edward	Completed online certification	Leadership	05/15/2017	Employee + Manager	Warren, Edward

Adding a Performance Note

To add a performance note for your employee, click on **New Note** button and select **For My Team Member**.

Enter the following Information in the note window:



- 1 Use **Select Employee** to choose from a list of your direct reports.
- 2 Enter the **Reason** for the note you would like to add.
- 3 *Optional:* Choose a **Core Values and Skills** category for the note from the drop-down box.
- 4 Enter the **Date** of the note. The date will determine if the note will be available to view in a performance review.
- 5 *Optional:* Add a **Description** of the note.
- 6 **Who do I want to share this with?** You can choose to share the note with your employee by selecting **Employee + Manager** or you can keep the note private and only viewable to **Manager**.
- 7 **Save** your employee's performance note.