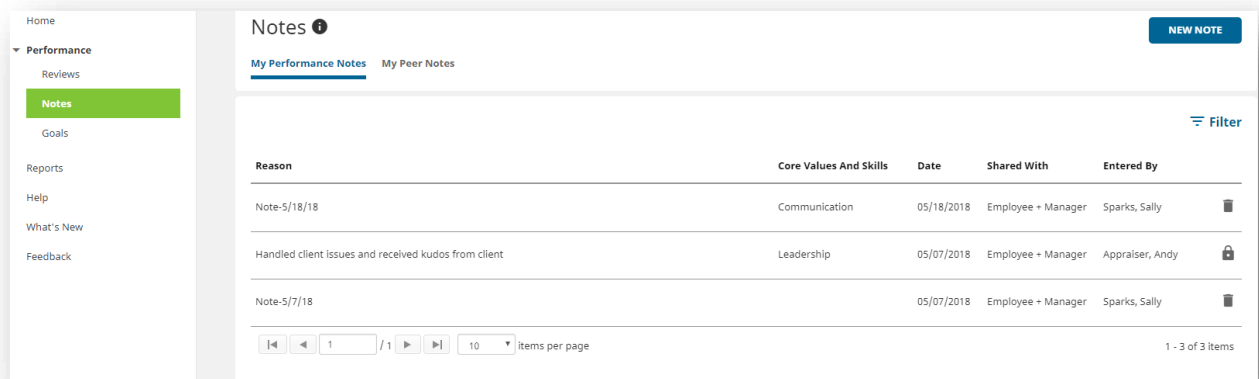


Quick Guide - Adding Your Performance Notes

Performance Notes are a great way to track events that have occurred over the course of the year, such as recognition. 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

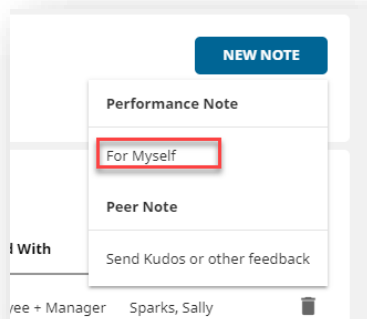
Go to **Performance** in the left-hand menu and click on **Notes**. To access personal performance notes, click on **My Performance Notes**.



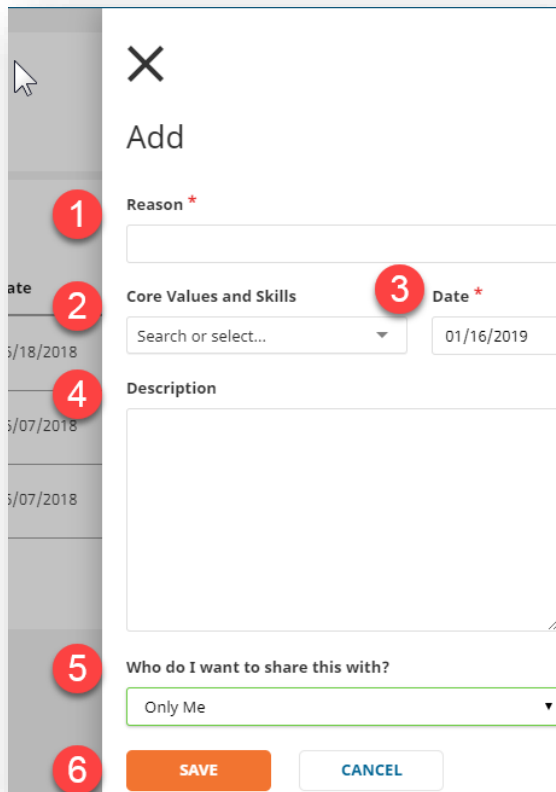
Reason	Core Values And Skills	Date	Shared With	Entered By
Note-5/18/18	Communication	05/18/2018	Employee + Manager	Sparks, Sally
Handled client issues and received kudos from client	Leadership	05/07/2018	Employee + Manager	Appraiser, Andy
Note-5/7/18		05/07/2018	Employee + Manager	Sparks, Sally

Adding a Performance Note

To add a performance note, click the **New Note** button and choose **For Myself**.



Enter the following Information in the note window:



The screenshot shows a modal window titled 'Add' with a close button (X) in the top left. The window contains the following fields and controls:

- 1** Reason * (text input field)
- 2** Core Values and Skills (dropdown menu with 'Search or select...' text)
- 3** Date * (text input field with '01/16/2019' entered)
- 4** Description (text area)
- 5** Who do I want to share this with? (dropdown menu with 'Only Me' selected)
- 6** SAVE (orange button) and CANCEL (blue button) at the bottom.

- 1** Enter the **Reason** for the note you would like to add.
- 2** *Optional:* Choose a category for the **Core Values and Skills** for the note from the drop down box.
- 3** Enter the **Date** of the note. The date will determine if the note will be available to view in a particular performance review.
- 4** *Optional:* Add a **Description** of the note.
- 5** **Who do I want to share this with?** You can choose if the is a note visible to just you or to also share this note with your manager.
- 6** **Save** your performance note.

