

Navigation: Main Menu > Manager Self Service > Performance Management > Maintain Performance Notes

Instructions

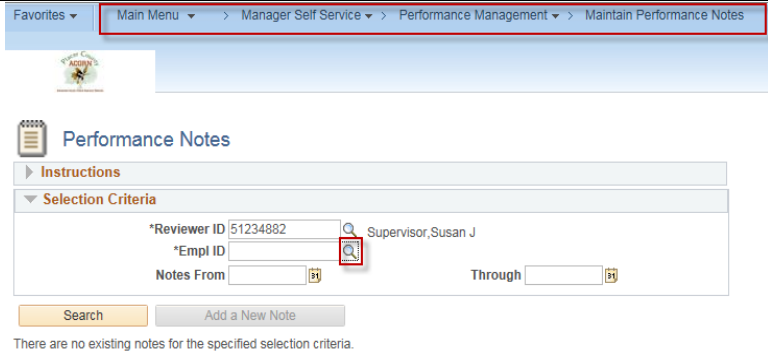
ACORN Page

PURPOSE: Throughout a review period, Supervisors, Managers, and Employees can enter notes to record performance information for any county Employee.

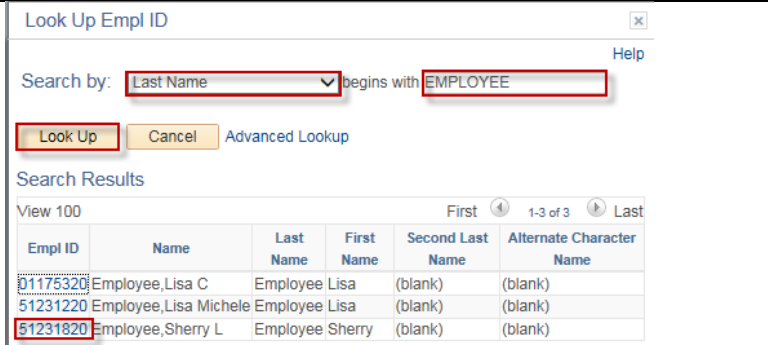
Performance Notes can be used by Supervisors when evaluating an Employee's performance. Employees can create notes about their own performance and review those notes during their self-evaluation. Performance Notes can be transferred to a Supervisor. Notes are dated and available only to the author of the note, and can optionally be pulled directly into an evaluation. In addition, Supervisors also have the ability to edit Notes within an evaluation. The steps listed below demonstrate the process for a Supervisor to add, delete, and transfer Performance Notes.

IMPORTANT – Please ensure you clear your cache and cookies and that your browser settings are correct prior to starting an evaluation. Please email ePerf@placerco.ad if you are unsure where to find the most recent browser settings documentation. IF YOU DO NOT PERFORM THESE FUNCTIONS ePerformance MAY NOT WORK AS DESIGNED.

1. Navigate to **Main Menu > Manager Self Service > Performance Management > Maintain Performance Notes.**
2. Click on the search icon next to the Empl ID.

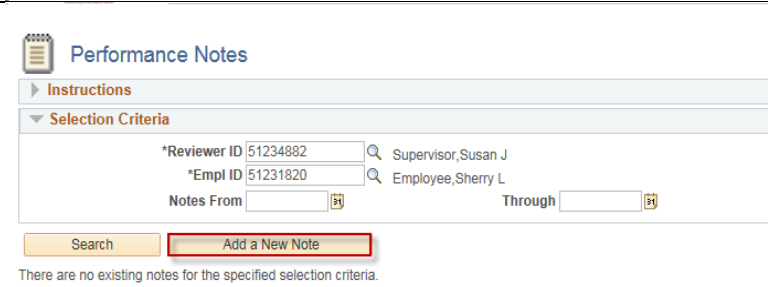


3. A search box will appear. Click on the dropdown in the "Search by" field. Select "Last Name" and enter the Last Name of the employee in the "Begins with" field. Click the "Look Up" button.
4. Choose the appropriate employee by clicking on the "Employee ID" number.



Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
01175320	Employee, Lisa C	Employee	Lisa	(blank)	(blank)
51231220	Employee, Lisa Michele	Employee	Lisa	(blank)	(blank)
51231820	Employee, Sherry L	Employee	Sherry	(blank)	(blank)



5. Click on "Add a New Note" button.



Performance Notes

<p>6. Enter in the Subject line:</p> <ul style="list-style-type: none"> • Date note is created, the employee name, and the competency the note pertains to. • Enter the note and click on the "Save" button. <p>7. Click on the "Return to Performance Notes Selection" link.</p>																
<p>8. The Supervisor has the ability to delete a note or transfer a note to another person.</p> <ul style="list-style-type: none"> • To "Delete" a note click the check box next to the note you want to delete. Click the "Delete" button. • To Transfer a note click on the check box next to the note you want to transfer. Click the "Transfer" button. 	<table border="1"> <thead> <tr> <th>Reviewer ID</th> <th>Empl ID</th> <th>Select</th> <th>Subject</th> <th>Created</th> </tr> </thead> <tbody> <tr> <td>51234882</td> <td>51231820</td> <td><input checked="" type="checkbox"/></td> <td>04/12/2016 - Sherry Employee - Cooperation</td> <td>04/13/2016 7:36AM</td> </tr> <tr> <td>51234882</td> <td>51231820</td> <td><input type="checkbox"/></td> <td>Job Well Done</td> <td>04/13/2016 7:29AM</td> </tr> </tbody> </table>	Reviewer ID	Empl ID	Select	Subject	Created	51234882	51231820	<input checked="" type="checkbox"/>	04/12/2016 - Sherry Employee - Cooperation	04/13/2016 7:36AM	51234882	51231820	<input type="checkbox"/>	Job Well Done	04/13/2016 7:29AM
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<p>9. To continue the steps to Transfer, enter the Last Name of the person you want to transfer the notes to. Click the "Search" button. Click the check box for the appropriate person. Click the "OK" button.</p>																

Performance Notes

<p>10. You will receive a confirmation page to verify you have selected the appropriate person for the transfer. Click the "OK" button to continue.</p>	<p>Performance Notes</p> <p> You are about to transfer the following note(s) to: Supervisor, Monique E</p> <p>- 04/12/2016 - Sherry Employee - Cooperation</p> <p>Select OK to confirm the transfer, or Cancel to cancel the transfer.</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>										
<p>11. You will no longer be able to view the note you deleted or transferred. 12. After each rating period, notes made in the previous rating period will no longer be available for viewing.</p>	<p> Performance Notes</p> <p>Instructions</p> <p>Selection Criteria</p> <p>*Reviewer ID: <input type="text" value="51234882"/> Supervisor, Susan J *Empl ID: <input type="text"/> Notes From: <input type="text"/> Through: <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Add a New Note"/></p> <p>Existing Performance Notes for this Employee Personalize Find (2)</p> <table border="1"> <thead> <tr> <th>Reviewer ID</th> <th>Empl ID</th> <th>Select</th> <th>Subject</th> <th>Created</th> </tr> </thead> <tbody> <tr> <td>51234882</td> <td>51231820</td> <td><input type="checkbox"/></td> <td>Job Well Done</td> <td>04/13/2016 7:29AM</td> </tr> </tbody> </table> <p>Select All Deselect All</p> <p><input type="button" value="Delete"/> <input type="button" value="Transfer"/></p>	Reviewer ID	Empl ID	Select	Subject	Created	51234882	51231820	<input type="checkbox"/>	Job Well Done	04/13/2016 7:29AM
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