

Performance Notes in PeopleSoft

Creating a Performance Note:

- Login to Peoplesoft -> Self-Service -> My Performance
- Once you're in My Performance click on "Performance notes" found on the left hand side (see screenshot below)

Document Type	Document Status	Period Begin / Period End	Next Due Date
Annual Review	Evaluation in Progress	07/01/2019 05/31/2020	05/01/2020

- Once you are in the Performance Notes tab, you can create a note by clicking "add a new note"

There are no existing notes for the specified selection criteria.

- When this opens, type your title in the "Subject" field and your content in the "Note Text field"
- **Click Save**
- Once you return to your performance notes the note will appear under "Your existing Performance Notes"

Adding Performance Notes to Performance Evaluation Goals and Annual Comment Section

- To use a note you've created in your Performance Review go back into PeopleSoft -> Self-Service -> My Performance
- Click on "My Current Documents" to open your performance review
- Once inside the evaluation, click on the "Goals" tab if you want to add the note to your goals section or click on "Annual" if you want to add it to your year-end self-evaluation
- Then click on the hyperlink that reads "Writing Tools" in the Employee Comments section

Goals

Use this space to document your conversation with your manager about your goals/priorities and professional development areas of focus for the current performance period. Include notes on the intended impact of your work. If applicable, use the separate "Competencies" tab to review the specific competencies you will focus on as discussed with your manager.

Click on **Save** to save your changes. Do not click on Complete Annual.

Goals Summary

Employee Comments **Writing Tools**

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- Once you open the hyperlink, click the drop down for "Find Additional Content" to add "From Performance Notes" and hit "Go"

Annual Review

Writing Tools - Suggested Results

No Suggested Results were found. Please select a value under **Find Additional Content** below and click **Go**.

Comments

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Save and Return Cancel Find Additional Content [Dropdown] Go

- Then hit search and the performance notes you have written will appear
- Click on the box next to the note you want to add to your comment and then click "Add to Comments"

Writing Tools - Performance Notes

Date Range

Begin Date [Calendar] End Date [Calendar]

Search Clear

Suggested Results

1-1 of 1 View All

	Suggested Results Text
<input checked="" type="checkbox"/>	This is a test.

Select All Deselect All

Add to Comments

Comments

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- The note will appear at the bottom of your comments section
- Click **“Save and Return”** to finalize