



CLERK & COMPTROLLER PALM BEACH COUNTY

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Clerk & Comptroller
Palm Beach County

ePerformance Employee User Guide

Introductory Performance Review

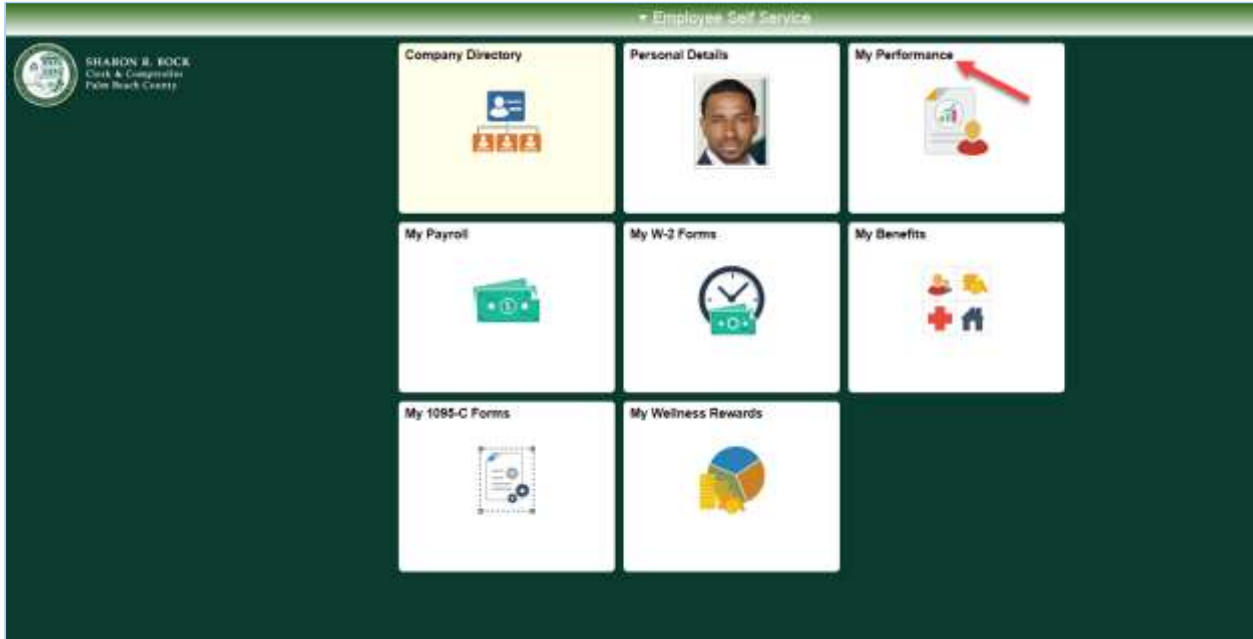
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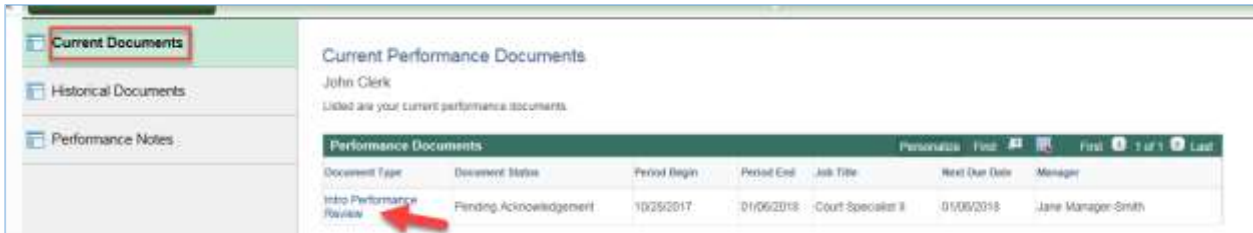
Employee's Guide - Introductory Performance Review or Extension

1. Access Review or Extension

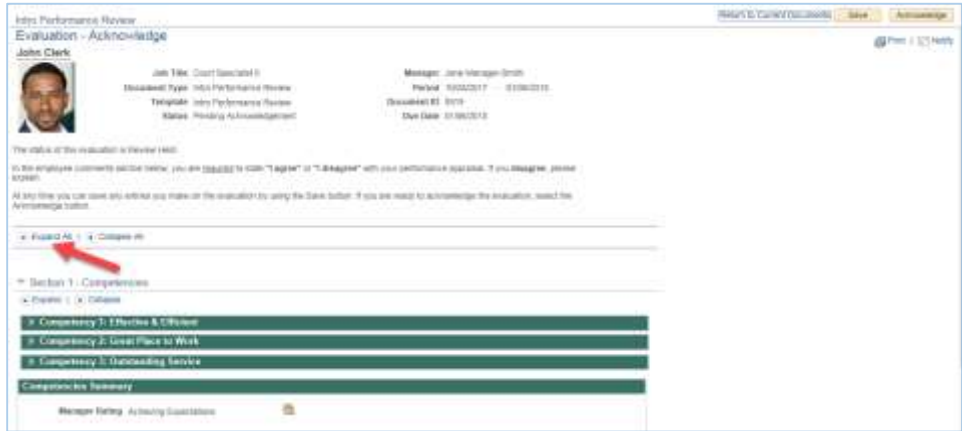
Login to PeopleSoft and go to the Employee Self Service menu. Click the **My Performance** tile.



Click on the Introductory Performance Review on the **My Current Documents** page.

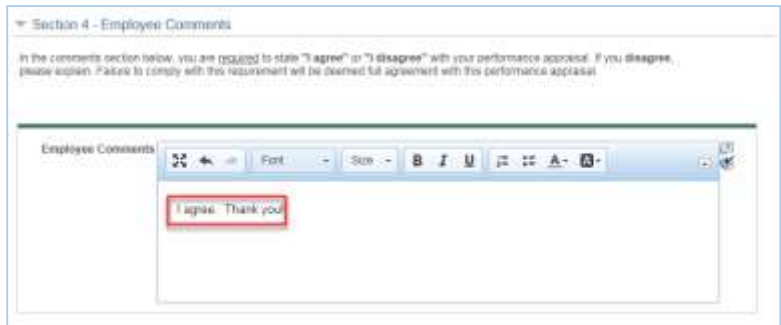


Click on **Expand All** link to view the ratings for all Competencies. Scroll to the bottom to read the Employee Future Goals and the Manager Comments.



2. Enter Comments and Acknowledge Review or Extension

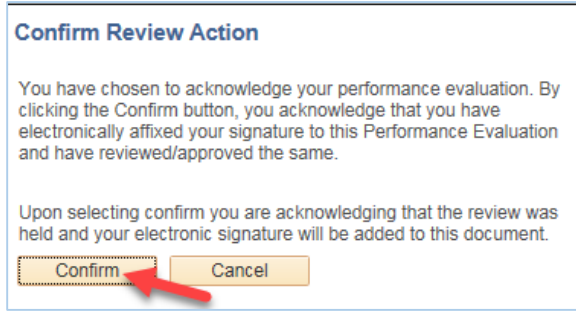
Scroll down to the Employee Comments section and type either **“I agree”** or **“I disagree.”** Enter any additional **comments**.



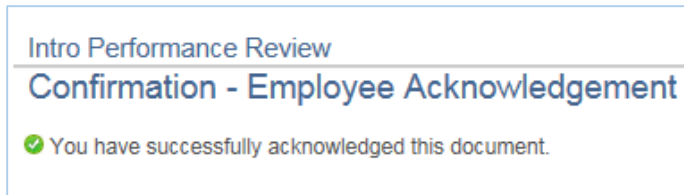
Click the **Save** button and then click the **Acknowledge** button.



A confirmation message will be displayed. Click the **Confirm** button.



A second confirmation message will be displayed.



Performance Notes (Optional)

1. Enter Performance Note

Login to PeopleSoft and go to the Employee Self Service menu. Click the **My Performance** tile.



Click the **Performance Notes** section.

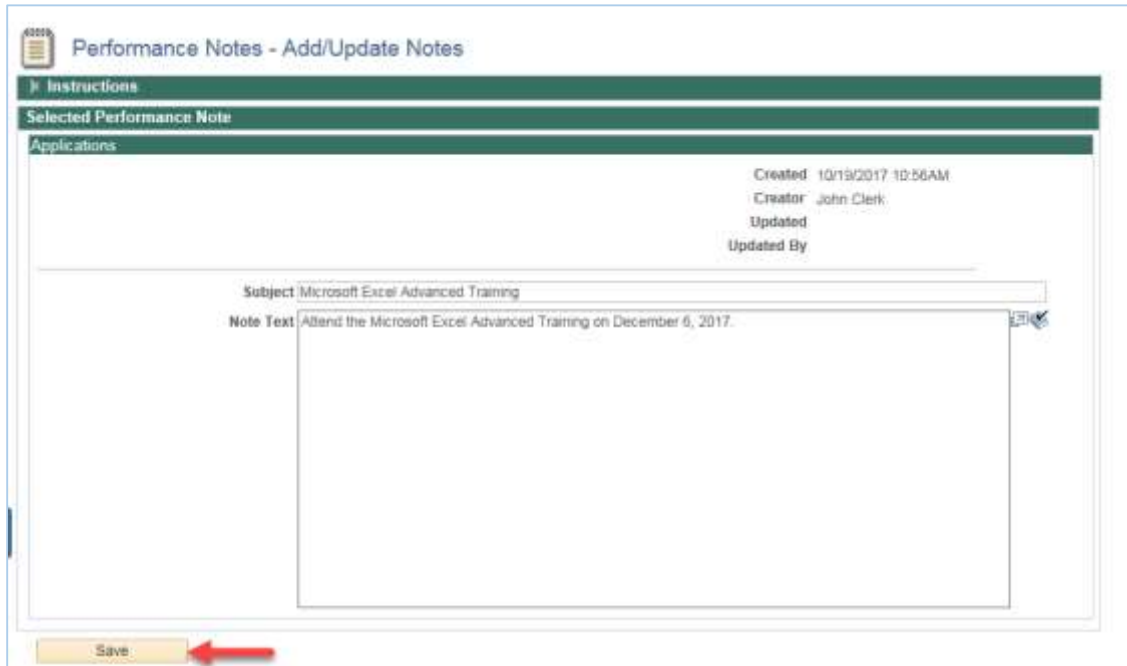


Click the **Add a New Note** button.



Enter the **Subject** and place additional comments in the **Note Text**.

Click the **Save** button.



2. Search for Performance Note

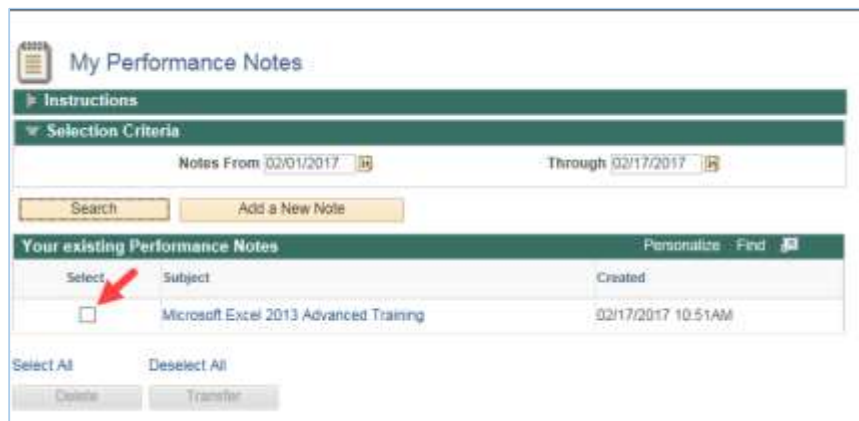
Enter a date range in the **Notes From** and **Through** fields.

Click the **Search** button.



The screenshot shows the 'My Performance' interface. Under the 'Selection Criteria' section, the 'Notes From' field contains '02/01/2017' and the 'Through' field contains '02/17/2017'. Below these fields are two buttons: 'Search' and 'Add a New Note'. A red arrow points to the 'Search' button.

Check the **Select** box on the desired performance note.



The screenshot shows the 'My Performance' interface with a table of performance notes. The table has columns for 'Select', 'Subject', and 'Created'. The first row shows a note with the subject 'Microsoft Excel 2013 Advanced Training' and a creation date of '02/17/2017 10:51AM'. A red arrow points to the 'Select' checkbox.

Select	Subject	Created
<input type="checkbox"/>	Microsoft Excel 2013 Advanced Training	02/17/2017 10:51AM

3. Edit Performance Note

Click the **Subject** hyperlink to view or edit.



The screenshot shows the 'My Performance' interface with the same table of performance notes. A red arrow points to the 'Subject' hyperlink 'Microsoft Excel 2013 Advanced Training'.

Select	Subject	Created
<input type="checkbox"/>	Microsoft Excel 2013 Advanced Training	02/17/2017 10:51AM

Edit the information. Click the **Save** button.

The screenshot shows a web application window titled "My Performance". The main content area is titled "Performance Notes - Add/Update Notes". It contains a "Selected Performance Note" section with the following details:

- Created: 10/17/2017 10:55AM
- Create: John Clark
- Last Update: 10/17/2017 10:56AM
- Updated By:

Below this is a "Subject" field containing "Microsoft Excel 2013 Advanced Training" and a "Note Text" field containing "Attend Microsoft Excel 2013 Advanced Training on April 7, 2017". A red arrow points to a yellow "Save" button at the bottom left of the form. At the bottom of the page, there is a link that says "Return to Performance Note Selection".

Note: Performance notes do not load in to performance documents. If using this feature, copy and paste your notes to include them in a performance document.