

Getting Started

- Start at the Human Resources home paa33263.72hS3.7 1



Adding Progress Notes for Employee

Individual Reviews Progress Notes

- Select My Employees' Reviews on the left hand side of the page.
- Select the Individual Employee review. Click Progress Notes on the sidebar, then click Create Progress Note

The Dashboard Progress Notes:

- Select Progress Notes on the toolbar. Click Create Progress Note.

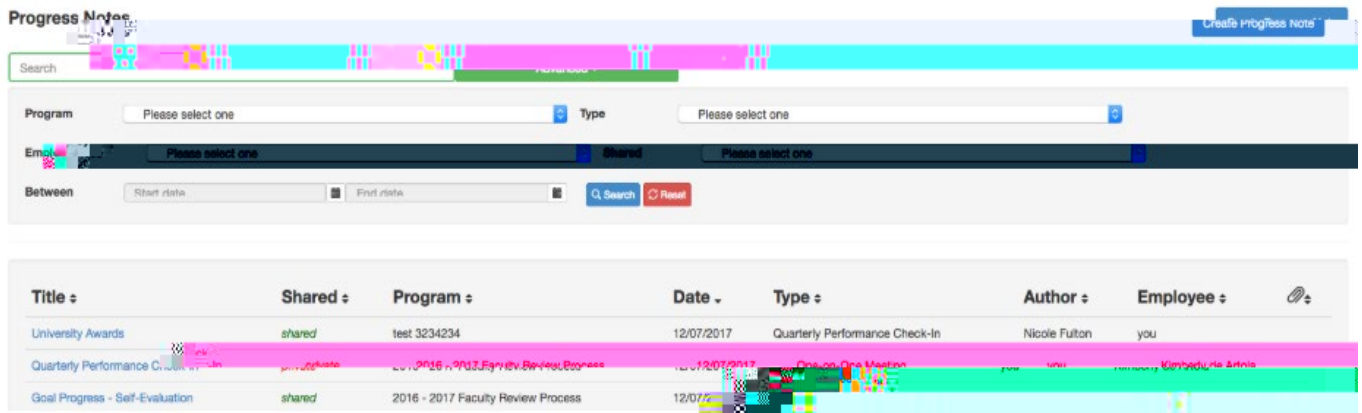
The following popup will appear:

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PAPERS User Guide: PROGRESS NOTES CLASSIFIED EMPLOYEES

Viewing and Editing Progress Notes

- Select Progress Notes on the toolbar to see a dashboard with all notes. Click Advanced to filter your notes by Program, Employee, Type, or Date. You can sort your search by any column.
- To view a progress note, click the title. The progress note will appear as a popup, and you will be able to Delete or Edit.



The screenshot shows the 'Progress Notes' dashboard. At the top right is a 'Create Progress Note' button. Below is a search bar and filter options for Program, Employee, and Type, each with a 'Please select one' dropdown. There are also 'Start date' and 'End date' fields. A 'Search' button and a 'Reset' button are located below the filters. The main content is a table with the following columns: Title, Shared, Program, Date, Type, Author, and Employee. The table contains three rows of data:

Title	Shared	Program	Date	Type	Author	Employee
University Awards	shared	test 3234234	12/07/2017	Quarterly Performance Check-In	Nicole Fulton	you
Quarterly Performance Check-In	private	2016 - 2017 Faculty Review Process	12/07/2017	One-on-One Meeting	you	Kimberly Artale
Goal Progress - Self-Evaluation	shared	2016 - 2017 Faculty Review Process	12/07/2017	One-on-One Meeting	you	Kimberly Artale