

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.

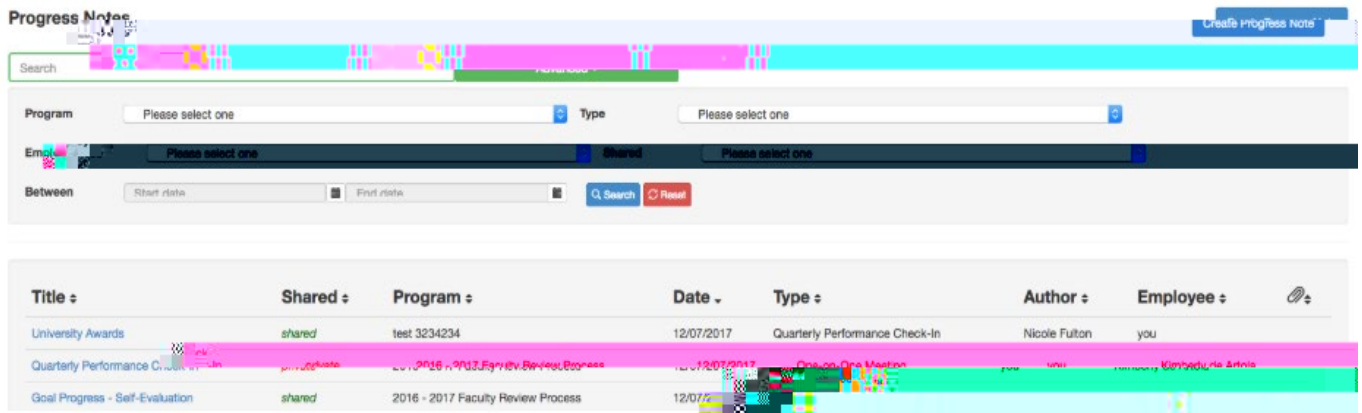
The following popup will appear:

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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 with a magnifying glass icon. Underneath are filter dropdowns for 'Program' and 'Type', both currently set to 'Please select one'. There are also dropdowns for 'Employee' and 'Shared'. Below these are date range selectors for 'Start date' and 'End date', followed by 'Search' and 'Reset' buttons. The main area contains a table with the following 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			