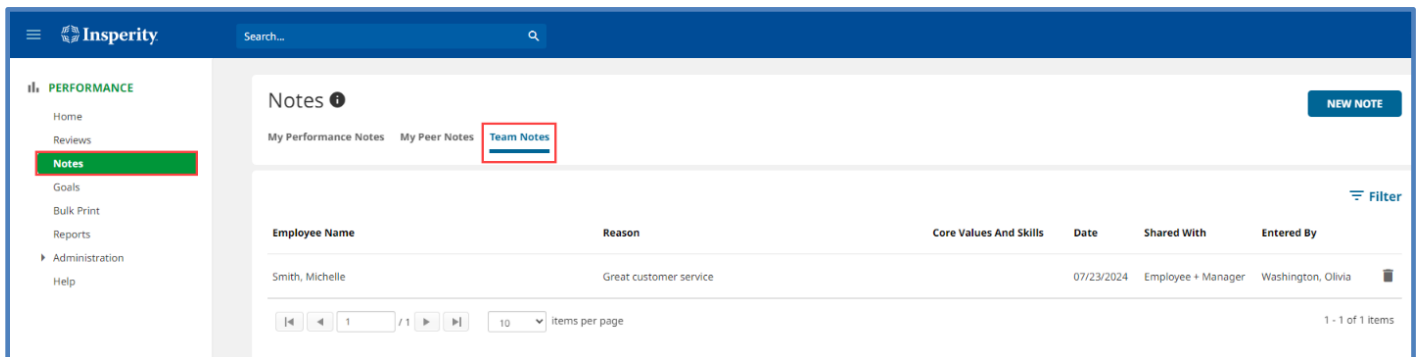


Adding Performance Notes for Your Employees

Performance Notes are a great way to quickly note events that have occurred throughout the year for your employees, such as recognition or coaching. These notes can be available to view in your performance review if the date of the note falls within the period of performance being reviewed.

Navigating to Notes

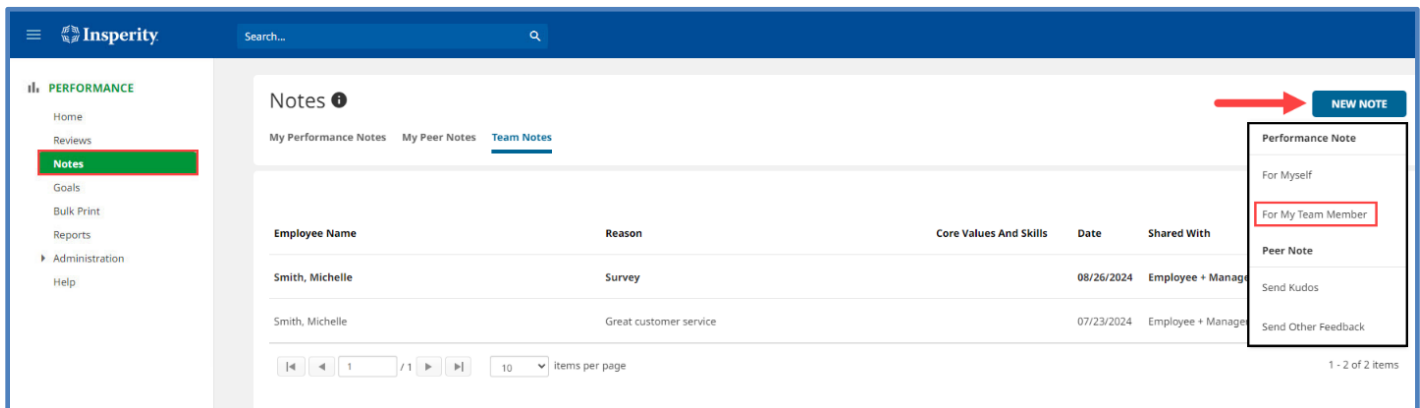
Select **Notes** in the left-hand menu. To access your team's notes, click on **Team Notes**.



The screenshot shows the Insperity interface. On the left, the 'PERFORMANCE' menu has 'Notes' highlighted with a red box. In the main content area, the 'Notes' page has three tabs: 'My Performance Notes', 'My Peer Notes', and 'Team Notes', with 'Team Notes' selected and highlighted with a red box. A table below shows a single entry for 'Smith, Michelle' with the reason 'Great customer service' and date '07/23/2024'. A 'NEW NOTE' button is visible in the top right corner.

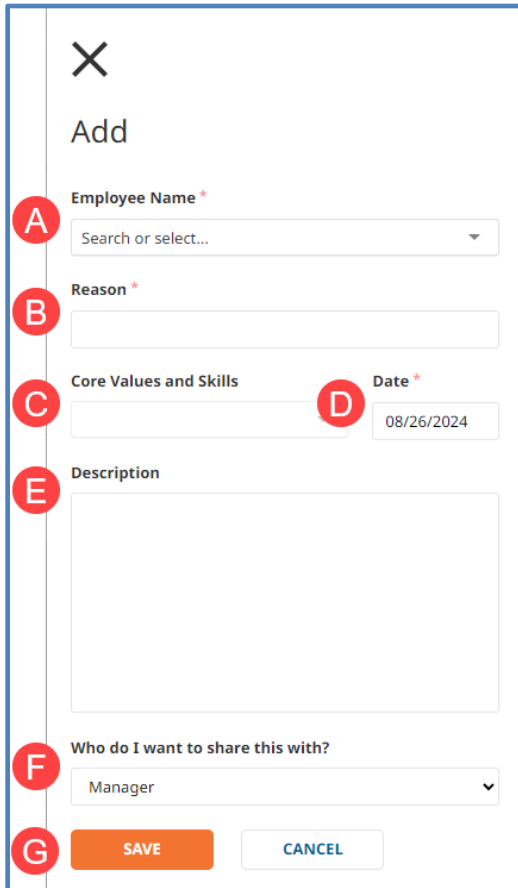
Adding a Performance Note

To add a performance note for your employee, click the **New Note** button and choose **For My Team Member**. If the employee is not a direct report, please see instructions on how to send a peer note [here](#).



This screenshot shows the 'NEW NOTE' button in the top right corner of the 'Notes' page, with a red arrow pointing to it. A dropdown menu is open, showing options: 'Performance Note', 'For Myself', 'For My Team Member' (highlighted with a red box), 'Peer Note', 'Send Kudos', and 'Send Other Feedback'. The table below shows two entries for 'Smith, Michelle', one with reason 'Survey' and date '08/26/2024', and another with reason 'Great customer service' and date '07/23/2024'. The 'NEW NOTE' button is highlighted with a red box.

Enter the following information:



The screenshot shows a modal window titled "Add" with a close button (X) in the top left. The form contains the following fields:

- A** Employee Name *: A search or select dropdown menu.
- B** Reason *: A text input field.
- C** Core Values and Skills: A dropdown menu.
- D** Date *: A date input field showing "08/26/2024".
- E** Description: A large text area for a detailed note.
- F** Who do I want to share this with?: A dropdown menu with "Manager" selected.
- G** SAVE and CANCEL buttons at the bottom.

- A. Use **Select Employee** to choose from a list of your direct reports.
- B. Enter the **Reason** for the note you would like to add.
- C. Choose a **Core Values and Skills** category for the note from the drop-down box (Optional).
- D. Enter the **Date** of the note. The date will determine if the note will be available to view in a performance review.
- E. Add a **Description** of the note (Optional).
- F. **Who do I want to share this with?** You can choose to share the note with your employee by selecting **Employee + Manager** or you can keep the note private and only viewable to **Manager**.
- G. **Save** your employee's performance note.