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CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

ePerformance

Employee User Guide

Performance Check-in



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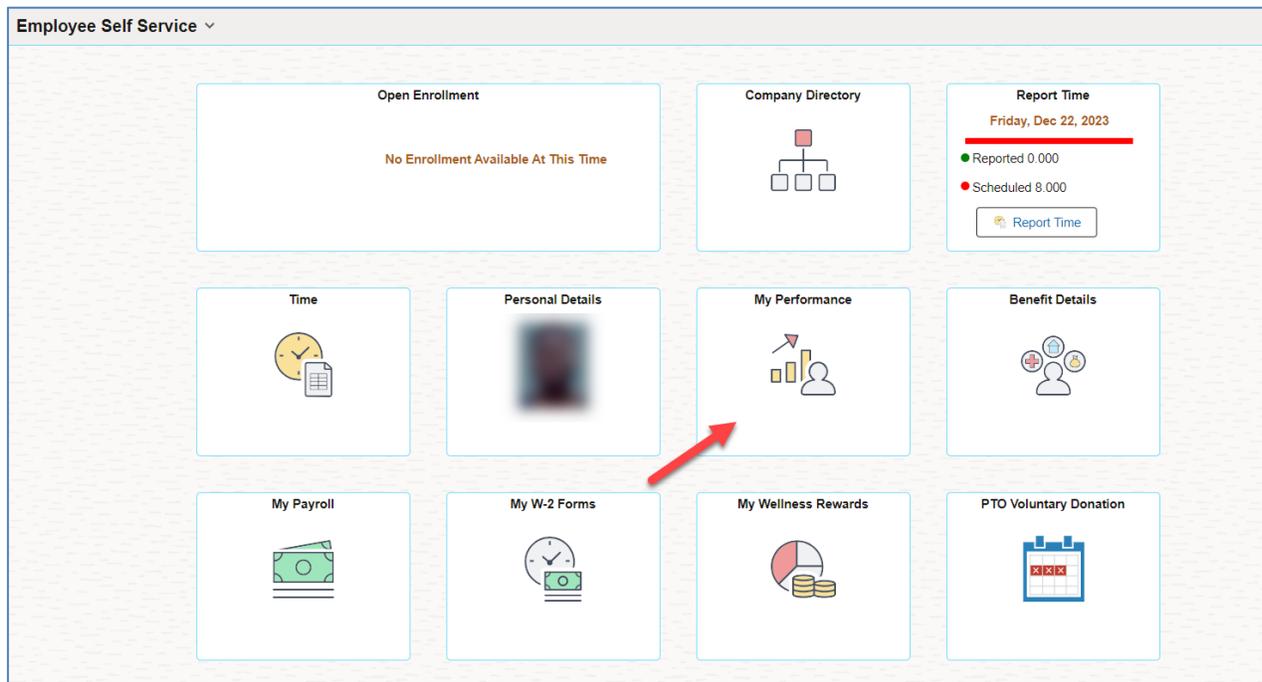
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Employee's Guide – Performance Check-in

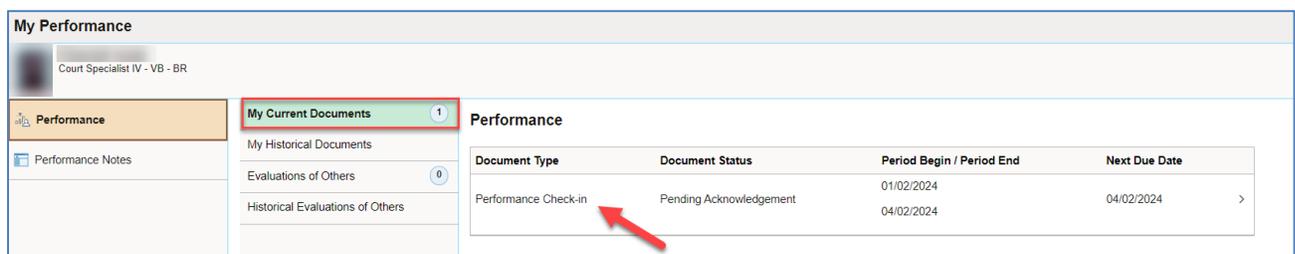
A Performance Check-in may be used during an employee's introductory period to indicate which competencies have been assessed and meet expectations and which competencies may not have been assessed yet or need to continue to be assessed. All new hires are to receive a Performance Check-in at 90 days.

1. Access Check-in

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



Click on the Performance Check-in 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.

Performance Check-in

Evaluation - Acknowledge

	Job Title	Court Specialist IV - VB - BR	Manager	
	Document Type	Performance Check-in	Period	01/02/2024 - 04/02/2024
	Template	Performance Check-in	Document ID	13091
	Status	Pending Acknowledgement	Due Date	04/02/2024

Guiding Principles: Honor - Respect - Devotion to Duty

The status of this evaluation is Review Held.

In the employee comments section below, you are required to state "I agree" or "I disagree" with your performance appraisal. If you **disagree**, please explain.

At any time you can save any entries you make on the evaluation by using the Save button. If you are ready to acknowledge the evaluation, select the Acknowledge button.

[Expand All](#) | [Collapse All](#)

2. Enter Comments and Acknowledge Check-in

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

Section 4 - Employee Comments

In the comments section below, you are required to state "I agree" or "I disagree" with your performance appraisal. If you **disagree**, please explain. Failure to comply with this requirement will be deemed full agreement with this performance appraisal.

Employee Comments

I agree. Thank you!!

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

Performance Check-in

Evaluation - Acknowledge

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[Expand All](#) | [Collapse All](#)

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

Acknowledge Review Held

You have chosen to acknowledge your performance evaluation. By clicking the Confirm button, you acknowledge that you have electronically affixed your signature to this Performance Evaluation and have reviewed/approved the same.

Upon selecting confirm you are acknowledging that the review was held and your electronic signature will be added to this document.

A second confirmation message will be displayed.

Performance Check-in

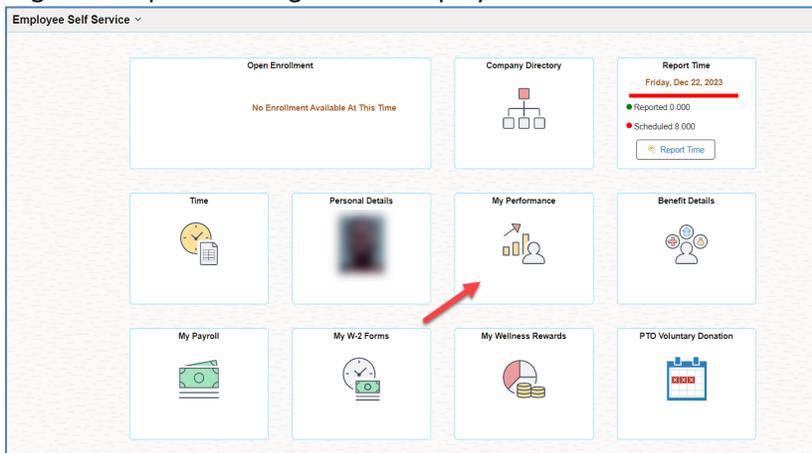
Confirmation - Employee Acknowledgement

✔ You have successfully acknowledged this document.

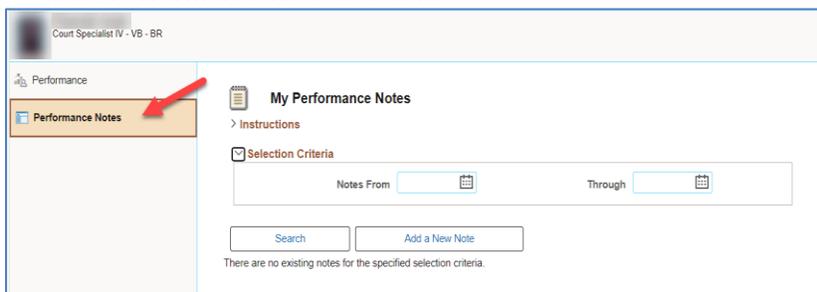
Performance Notes (Optional)

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.

The screenshot shows the 'My Performance Notes' interface. On the left, there is a sidebar with 'Performance Notes' selected. The main area has a title 'My Performance Notes' and a sub-section 'Instructions'. Below that is a 'Selection Criteria' section with two date pickers: 'Notes From' and 'Through'. At the bottom of this section are two buttons: 'Search' and 'Add a New Note'. A red arrow points to the 'Add a New Note' button. Below the buttons, it says 'There are no existing notes for the specified selection criteria.'

Enter the **Subject** of the performance document and place any additional comments in the **Note Text**. Click the **Save** button.

The screenshot shows the 'Performance Notes - Add/Update Notes' form. It has a title bar with a 'NEW' indicator. Below the title is a 'Selected Performance Note' section. Inside this section, there is a table with columns for 'Subject' and 'Note Text'. Both fields contain the text 'Customer Service'. To the right of the table, there are fields for 'Created' (12/22/2023 1:59PM), 'Creator' (Channah Israel), 'Last Update', and 'Updated By'. At the bottom left of the form is a 'Save' button, which is highlighted with a red arrow. Below the 'Save' button is a link that says 'Return to Performance Note Selection'.

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 Notes' interface. The 'Selection Criteria' section is expanded. The 'Notes From' date picker is set to '12/01/2023' and the 'Through' date picker is set to '02/01/2024'. Both date pickers are highlighted with red boxes. Below the date pickers 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.

My Performance Notes

> Instructions

Selection Criteria

Notes From 12/01/2023 Through 02/01/2024

Search Add a New Note

Your existing Performance Notes

Select	Subject	Created
<input checked="" type="checkbox"/>	Customer Service	12/22/2023 1:59PM

Select All Deselect All

Delete Transfer

3. Edit Performance Note

Click the **Subject** hyperlink to view the performance document.

My Performance Notes

> Instructions

Selection Criteria

Notes From 12/01/2023 Through 02/01/2024

Search Add a New Note

Your existing Performance Notes

Select	Subject	Created
<input type="checkbox"/>	Customer Service	12/22/2023 1:59PM

Select All Deselect All

Delete Transfer

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

 **Performance Notes - Add/Update Notes**

> Instructions

Selected Performance Note

Applications

Created 12/22/2023 1:59PM
Creator Channah Israel
Last Update
Updated By

Subject Customer Service

Note Text Customer Service training on January 8th at 5th Floor. 



[Return to Performance Note Selection](#)