



JOSEPH ABRUZZO
CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

ePerformance Leader User Guide Performance Check-in



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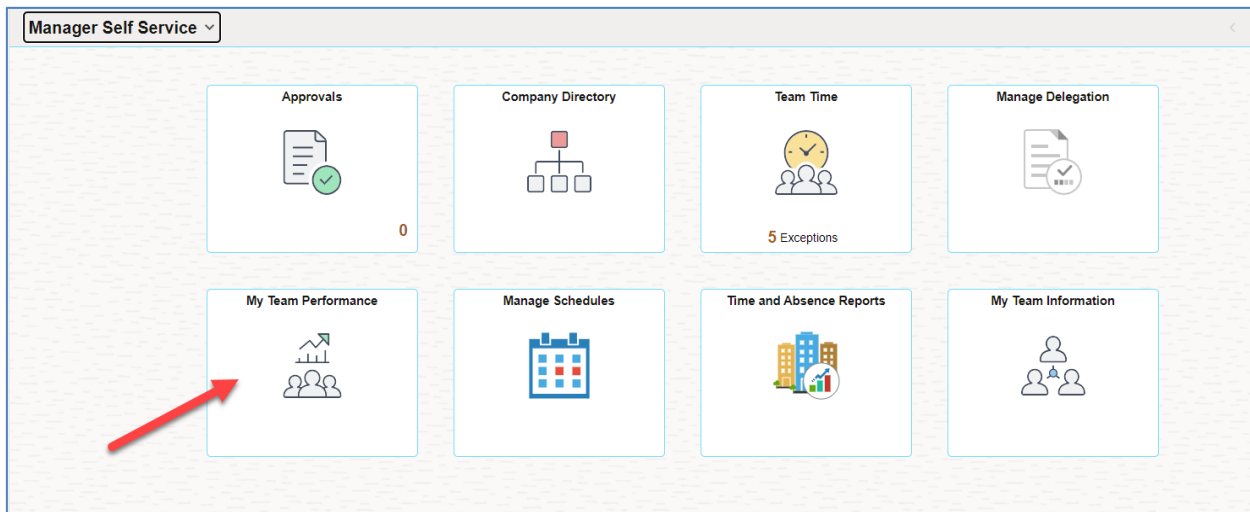
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Leaders Guide – Performance Check-in

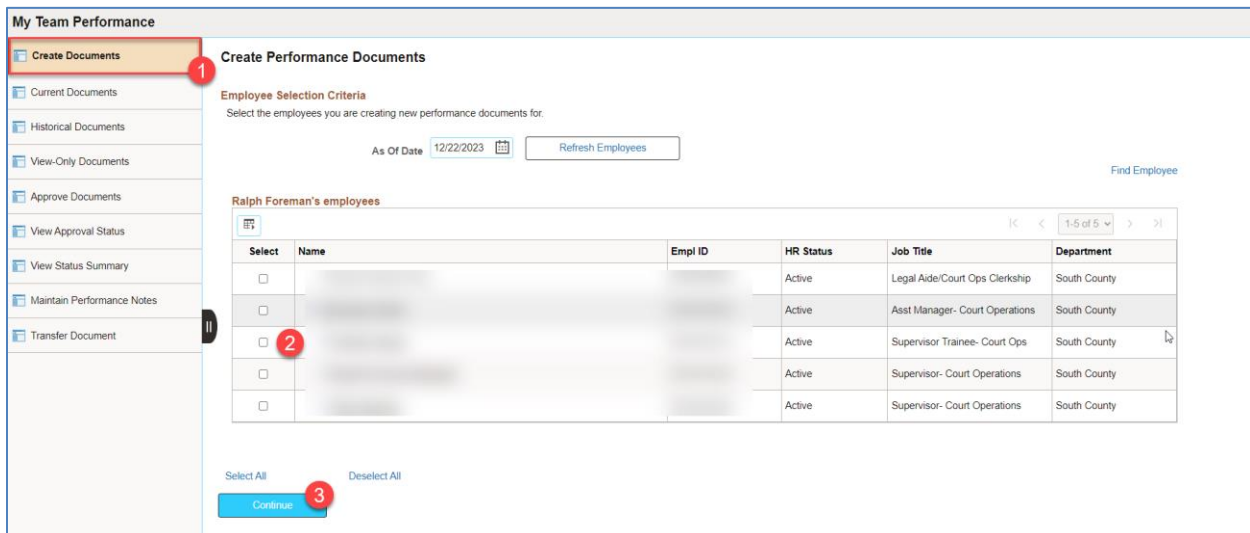
A Performance Check-in may be used during an employee’s introductory period to indicate which competencies have been assessed and meet expectations and which competencies may not have been assessed yet or need to continue to be assessed. This document needs to be completed at 90 days for all new hires.

1. Generate Check-in

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



Select the checkbox next to the employee that you want to create the document for. Click **Continue**.



Enter the data below:

Period Begin Date (normally the Date of Hire)

Period End Date (90 days after the Date of Hire)

Document Type (select **Performance Check-in** from the dropdown menu)

Template ID (select **Performance Check-in** from the dropdown menu)

Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

Document Creation Details

Period Begin Date	01/02/2024	Period End Date	04/02/2024
Document Type	Performance Check-in		
Clone from Prior Document	No		
Template	Performance Check-in		

[Create Documents](#)

Selected Employees

Employee ID	Last Name	First Name

[Return to Select Employees](#)

Click on **Current Documents**.

Create Performance Documents - Results

Below are the results for the employees you selected.

Selected Employees

Employee ID	Name	Template	Successful Creation?	Status
		Performance Check-in	Yes	Document created successfully

Go To [Create Documents](#) [Current Documents](#)

2. Begin Evaluation

Locate the desired document type for the employee. Click on the employee's **Name**.

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

> [Filter Criteria](#)

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
John Clerk	Performance Check-in	Evaluation in Progress	01/02/2024	04/02/2024	Court Specialist IV - VB - BR	04/02/2024

3. Rate Competencies

The review is displayed. Click on the **Expand All** button to see all of the individual Competency sections of the review.

Performance Check-in

Evaluation - View

Job Title	Court Specialist IV - VB - BR	Manager	[blurred]
Document Type	Performance Check-in	Period	01/02/2024 - 04/02/2024
Template	Performance Check-in	Document ID	13091
Status	Evaluation in Progress	Due Date	04/02/2024

Guiding Principles: Honor - Respect - Devotion to Duty

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

[Expand All](#) | [Collapse All](#) | [Cancel Evaluation](#) | [Change Due Date](#)

Section 1 - Competencies

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

- > Competency 1: Embraces Innovation&Creativity
- > Competency 2: Contribution to Clerk Culture
- > Competency 3: Dedication to Public Service

Competencies Summary

Manager Rating [] []

Each Competency has two ratings: **Assessed** and **Continue Assessment**. Click on the dropdown menu in every section to make a selection.

Competency 1: Embraces Innovation&Creativity

Behavior

Behavior 1: Productivity, Quality, & Time Management
Meets productivity goals; produces accurate and timely work; prioritizes work effectively; quickly adapts when a change is made.

Behavior 2: Job Knowledge
Possesses the necessary knowledge, skills and ability; participates in training; monitors trends and follows best practices.

Behavior 3: Integrity
Displays sound, objective judgment; honest; elevates issues appropriately.

Behavior 4: Innovation
Displays originality and contributes innovative ideas; suggests ways to complete work more efficiently; promotes the use of technology to streamline or automate processes.

Manager Rating [] []


Created By Profile [] []

Assessed
Continue Assessment

To review the Rating Descriptions click on the yellow **Notepad** icon.

Proficiencies

	Rating	Description
<input type="radio"/>	Assessed	Assessed - performance consistently meets established standards - employee requires little direction from supervisor - competency behaviors have been demonstrated in a satisfactory manner
<input type="radio"/>	Continue Assessment	Continue Assessment - work may be completed at an acceptable level - more time is needed to determine progress on key competency behaviors

Select Proficiency 


Return

Click **Return** to return to the previous page.

Proficiencies

	Rating	Description
<input type="radio"/>	Assessed	Assessed - performance consistently meets established standards - employee requires little direction from supervisor - competency behaviors have been demonstrated in a satisfactory manner
<input type="radio"/>	Continue Assessment	Continue Assessment - work may be completed at an acceptable level - more time is needed to determine progress on key competency behaviors


Select Proficiency


Return 

4. Calculate Competencies Summary Rating

Click on the **Calculator** icon to reveal the Summary Rating.

Competencies Summary



Manager Rating Continue Assessment 



5. Add Employee Future Goals

Click on the **Add Item** link to add goals.

Section 2 - Employee Future Goals

 Add Item 

Click on the **Add Your Own Item** radio button. Click on the **Next** button to continue.

Performance Check-in
Add Item

Add pre-defined item

1 Add your own Item

2 Next

Return

Enter the **Title** of the goal, select the Competency that it **supports** from the dropdown menu, and enter a **Due Date**. Click the **Add** button to continue.

Performance Check-in
Add Your Own Item

*Title

Supports

Due Date (example 12/31/2000)

Add

Return

In the **Comments** section, describe the goal using the SMART method (Specific, Measurable, Attainable, Relevant, and Time-bound).

Section 2 - Employee Future Goals

Expand | Collapse | Add Item

Productivity Goals

- Supports Competency : Embraces Innovation&Creativity
- Due Date : 06/07/2024

Manager Comments

Writing Tools

John is to continue to increase his productivity goals by becoming more familiar with department processes

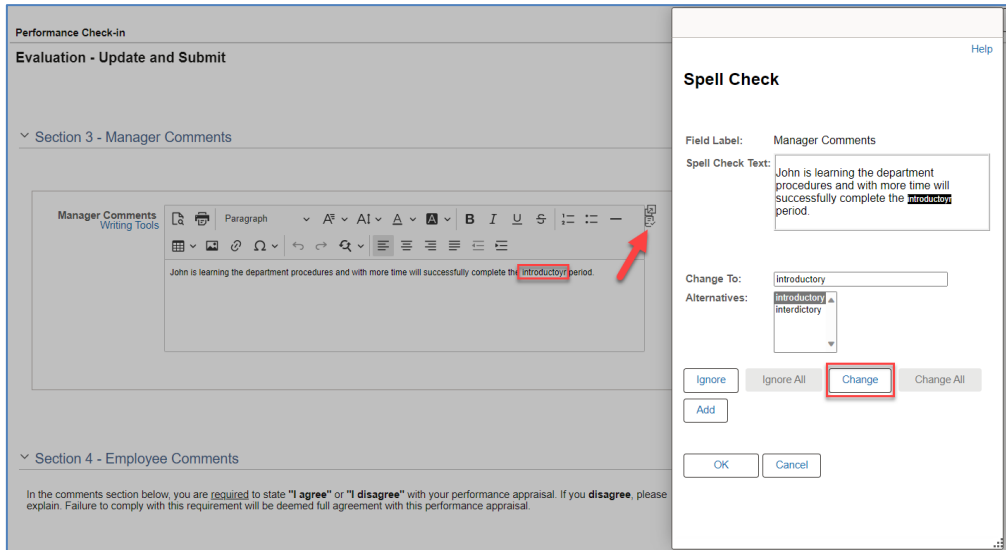
Created By

12/22/2023 10:50AM

6. Add Manager Comments & Check Language

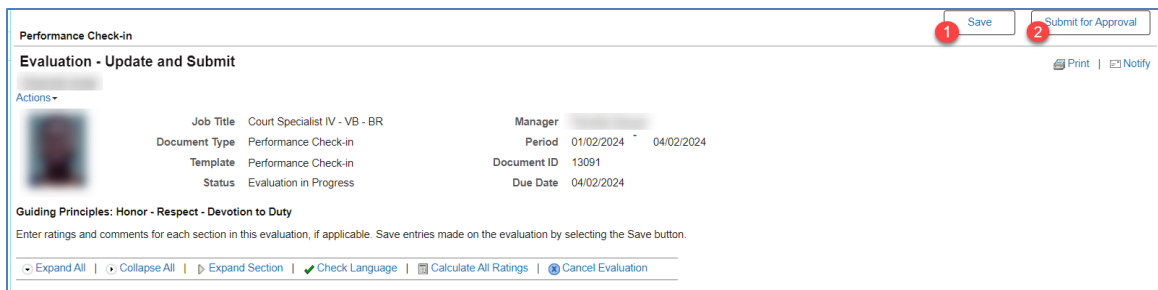
In the **Manager Comments** section, please indicate the areas the employee will need further assessment on, as well as any other comments.

Please note that there are editing tools to assist you. Below is an example of the Spell Check tool.

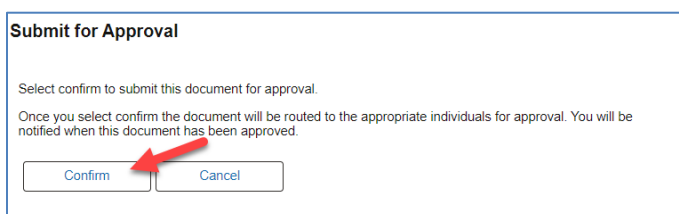


7. Save and Submit for Approval

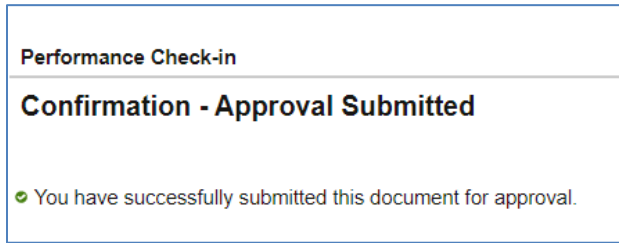
Click the **Save** button, then click the **Submit for Approval** button. This will generate an email to your One-Up Manager informing them that there is a review that requires their approval.



A confirmation message will appear. Click the **Confirm** button to submit the review for approval.



A second confirmation message will be displayed.



8. Review the Document Status

You can review the status of the review at any time by clicking on the Current Documents section. When your manager has approved the review you will receive an email. The status of the review will change from **Approval – Submitted** to **Approval – Approved**.

Current Performance Documents
Listed are the current performance documents for which you are the Manager.

[Filter Criteria](#)

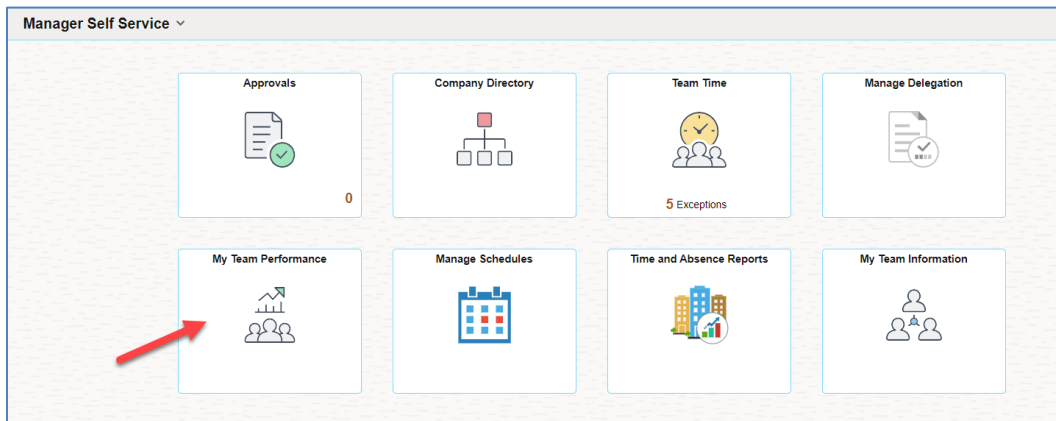
Performance Documents

Name	Document Type	Document Status	Period Begin	Period End↓	Job Title	Next Due Date
	Performance Check-in	Approval - Submitted	01/02/2024	04/02/2024	Court Specialist IV - VB - BR	04/02/2024

One-Up Approval

1. Access the Check-in

Login to PeopleSoft and go to the Manager Self Service menu from ClerkNet or from home using www.mypalmbeachclerk.com. Click the **My Team Performance** tile.



Click on the **Approve Documents** section. Locate the review that you want to approve. Click the employee **Name** link.

My Team Performance

- Create Documents
- Current Documents
- Historical Documents
- View-Only Documents
- Approve Documents**
- View Approval Status
- View Status Summary
- Maintain Performance Notes
- Transfer Document

Select Transaction to Approve

The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

> Filter Criteria

Performance Document

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
John Clerk	01/02/2024	04/02/2024	Approval	Submitted	Pamella Sawyer	Performance Check-in

2. Approve or Deny the Check-in

Click on Performance Document Details to open the Performance Check-in. Enter any comments in the **Comment** box. Then click **Approve** or **Deny**.

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Empl ID

Actions

Performance Document

Doc Type Performance Check-in

Author

Period Begin Date 01/02/2024 Period End Date 04/02/2024

Rating

1 Performance Document Details

Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

Pending

Uses Reports To Position

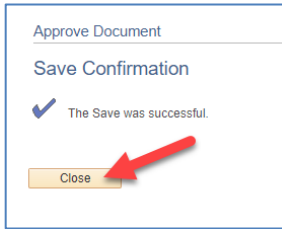
2 Comment I approve.

3 Approve Deny

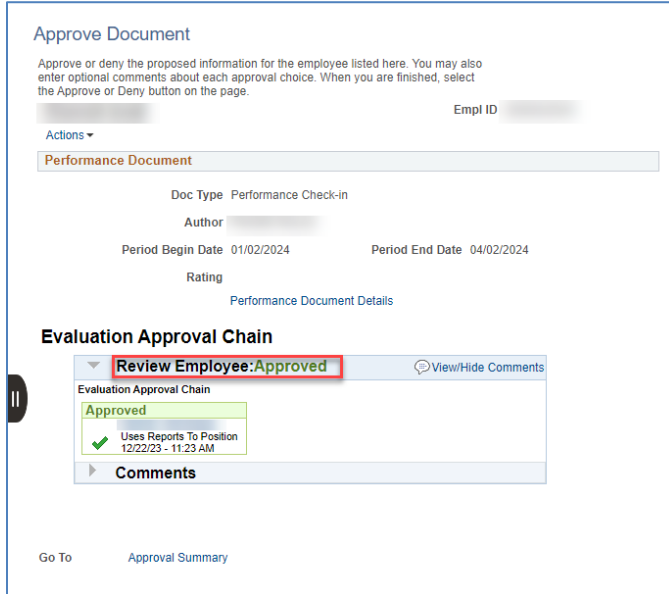
Go To Approval Summary

Note: The evaluator can see the comments but the employee cannot see the comment

A confirmation message will be displayed. Click **Close**.



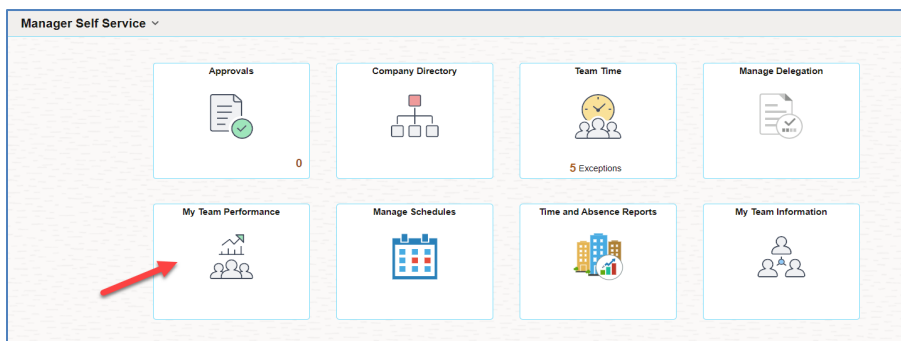
The **Approve Document** page will be displayed.



Release Check-in

1. Print the Check-in

Prior to meeting with the employee, print a copy of the Performance Check-in for them. Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



Click on Current Documents. Locate the document that has been approved. The status will be **Approval - Approved**. Click on the **employee's** name.

My Team Performance

Create Documents

Current Documents

Historical Documents

View-Only Documents

Approve Documents

View Approval Status

View Status Summary

Maintain Performance Notes

Current Performance Documents

Listed are the current performance documents for which you are the Manager.

Filter Criteria

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
John Clark	Performance Check-in	Approval - Approved	01/02/2024	04/02/2024	Court Specialist IV - VB - BR	04/02/2024

Click the **Printer** icon.

Performance Check-in

Return to Current Document Save Share with Employee

Evaluation - Share with Employee

Print Notify

Actions

Job Title: Court Specialist IV - VB - BR
Document Type: Performance Check-in
Template: Performance Check-in
Status: Approval - Approved

Manager: [Redacted]
Period: 01/02/2024 - 04/02/2024
Document ID: 12425
Due Date: 04/02/2024

Guiding Principles: Honor - Respect - Devotion to Duty

Expand All Collapse All

Click on the **Printer** icon again.

1 of 4

JOSEPH ABRUZZO
CLERK OF THE DISTRICT COURT OF FLORIDA
PALM BEACH COUNTY

Performance Check-in
Evaluation - Share with Employee

Job Title: Court Specialist IV - VB - BR
Document Type: Performance Check-in
Template: Performance Check-in
Status: Approval - Approved - Approved

Manager: [Redacted]
Period: 01/02/2024 - 04/02/2024
Document ID: 12425
Due Date: 04/02/2024

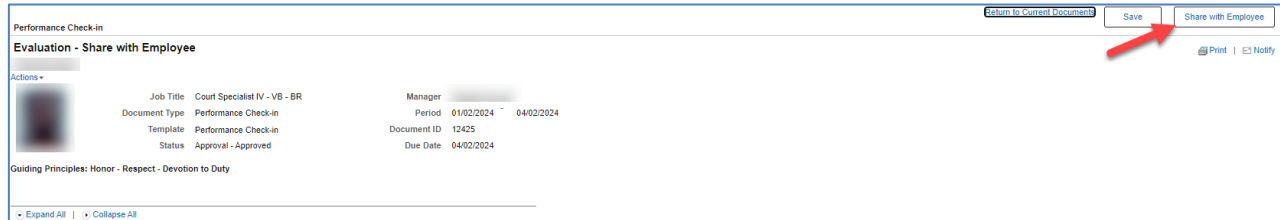
Guiding Principles: Honor - Respect - Devotion to Duty

Section 1 - Competencies

Competency 1: Embraces Innovation&Creativity

2. Release the Check-in

Conduct a one-on-one meeting with the employee. After the meeting, share the review electronically with the employee. Click the **Share with Employee** button.



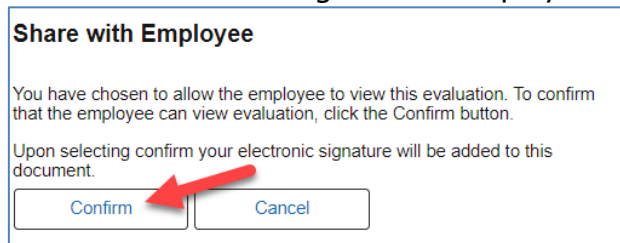
The screenshot shows the 'Performance Check-in' interface. At the top right, there are buttons for 'Return to Current Document', 'Save', and 'Share with Employee'. A red arrow points to the 'Share with Employee' button. Below the buttons, the interface displays 'Evaluation - Share with Employee' and a table of document details.

Job Title	Court Specialist IV - VB - BR	Manager	[Redacted]
Document Type	Performance Check-in	Period	01/02/2024 - 04/02/2024
Template	Performance Check-in	Document ID	12425
Status	Approval - Approved	Due Date	04/02/2024

Guiding Principles: Honor - Respect - Devotion to Duty

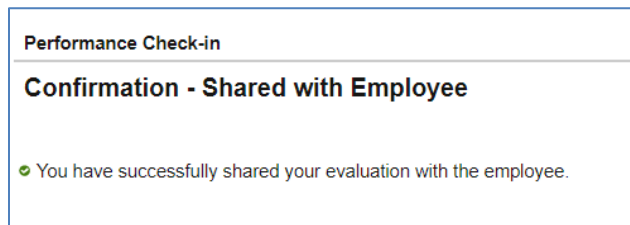
Expand All | Collapse All

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



The dialog box is titled 'Share with Employee'. It contains the following text: 'You have chosen to allow the employee to view this evaluation. To confirm that the employee can view evaluation, click the Confirm button.' and 'Upon selecting confirm your electronic signature will be added to this document.' At the bottom, there are two buttons: 'Confirm' and 'Cancel'. A red arrow points to the 'Confirm' button.

A second confirmation message will appear.

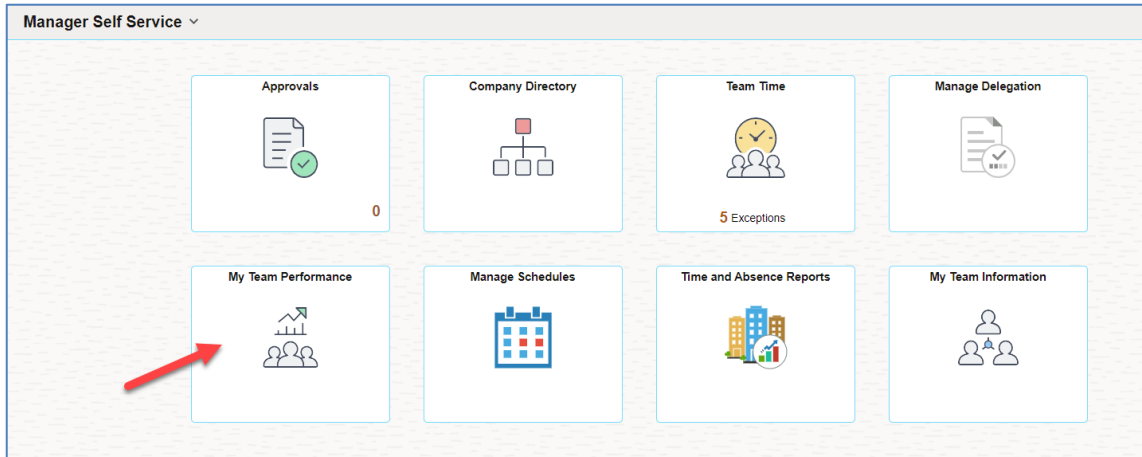


The screenshot shows a confirmation message box titled 'Performance Check-in'. The main heading is 'Confirmation - Shared with Employee'. Below the heading, there is a green checkmark icon followed by the text: 'You have successfully shared your evaluation with the employee.'

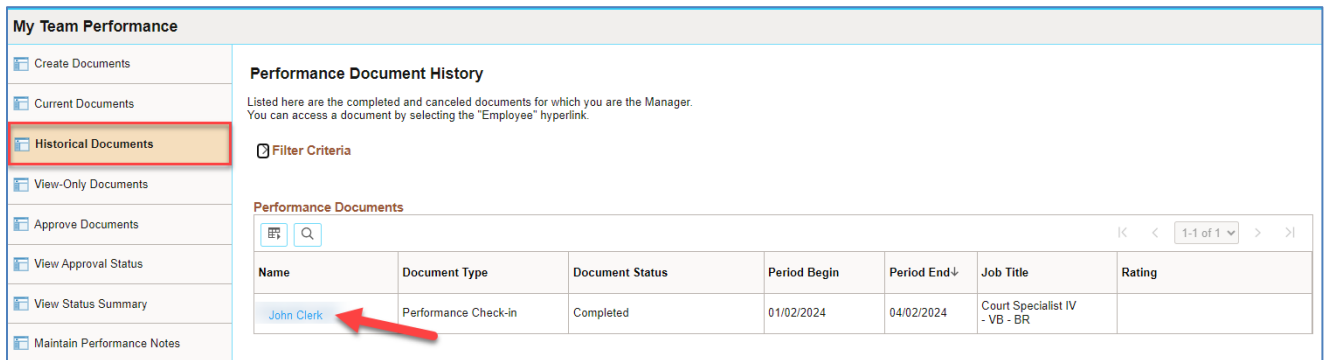
Complete Check-in

1. View Employee Comments

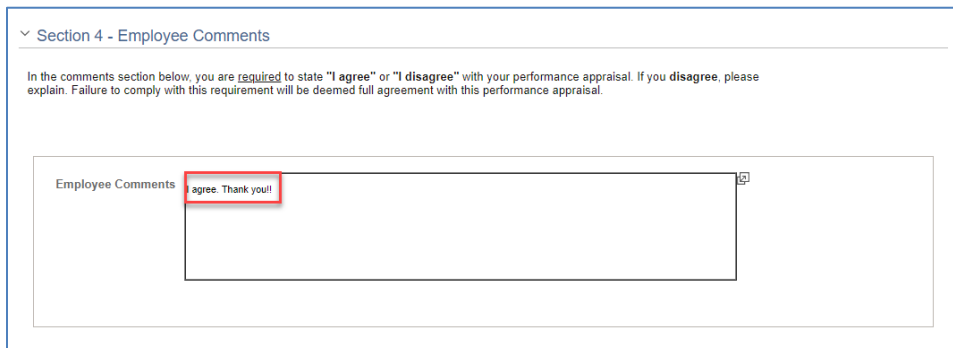
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



Click on **Historical Documents**. Click on the **employee name** of the performance document to review.



Scroll to the bottom of the document to view the **Employee Comments**.



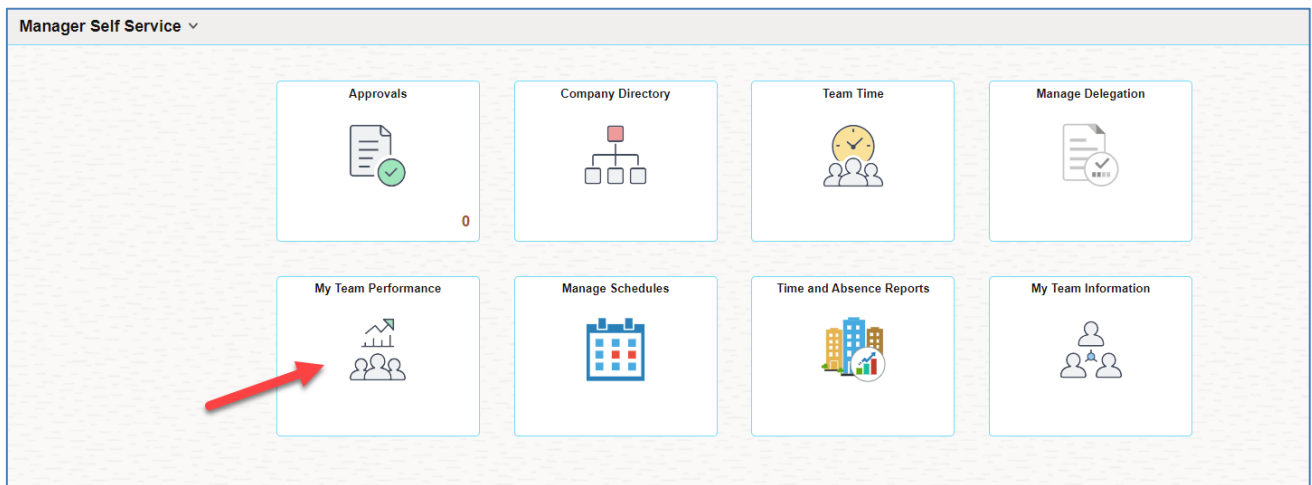
2. Reopen the Check-in

If you need to update your comments or change any of the ratings, please contact HRIS to reopen the review or extension. Note that just like all performance documents, if the Performance Check-in is re-opened, the document will need to go through the approval process again.

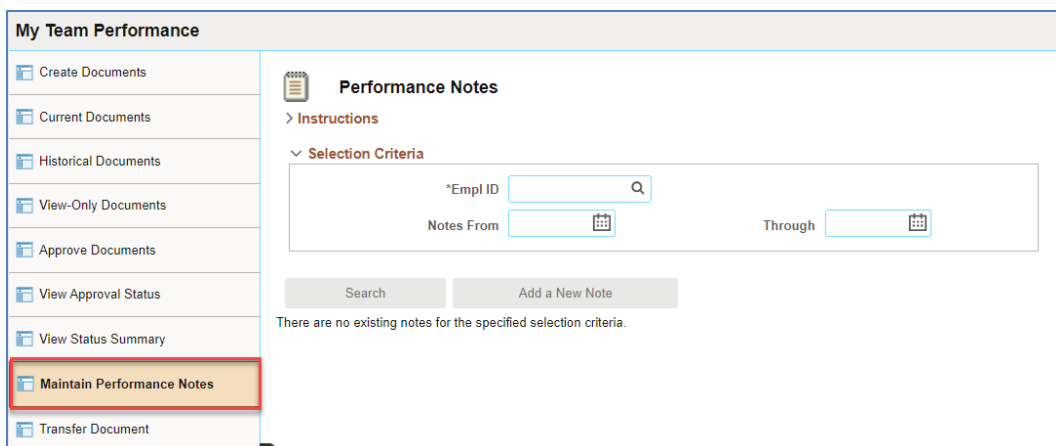
Performance Notes (Optional)

1. Enter Performance Notes

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



Click on **Maintain Performance Notes**.



Click on the **Magnifying Glass**.

The screenshot shows the 'Performance Notes' form. Under the 'Selection Criteria' section, there is a search field labeled '*Empl ID' with a magnifying glass icon to its right. A red arrow points to this magnifying glass icon. Below the search field are two date pickers labeled 'Notes From' and 'Through'. At the bottom of the form are two buttons: 'Search' and 'Add a New Note'. A message at the bottom states: 'There are no existing notes for the specified selection criteria.'

Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search**.

The first screenshot shows the 'Look Up Empl ID' dialog box. The 'Search by' dropdown menu is open, and 'Last Name' is selected. A red arrow points to 'Last Name'. The 'Search' button is also highlighted with a red box. The second screenshot shows the same dialog box with 'Last Name' selected in the dropdown and 'Clerk' entered in the 'begins with' field. The 'Search' button is highlighted with a red box. Below the search fields is a 'Search Results' section with a table. A red arrow points to the first row of the table, which is highlighted in blue. The table has the following data:

Empl ID	First Name	Last Name	Second Last Name	Alternate Character Name
00000012345	John	Clerk	(blank)	(blank)

Enter the **Notes From** and **Through** date for the performance note. Click on **Add a New Note**.

The screenshot shows the 'Performance Notes' form. The 'Notes From' date picker is set to '12/01/2023' and the 'Through' date picker is set to '02/03/2023'. Both date pickers are circled in red with the number '1'. The 'Add a New Note' button is circled in red with the number '3'. The 'Search' button is also visible. A message at the bottom states: 'There are no existing notes for the specified selection criteria.'

Enter the **Subject** and **Note Text** for the Performance Note. Click **Save**.

Performance Notes - Add/Update Notes

> Instructions

Selected Performance Note

Applications

Empl ID [redacted] Created 12/22/2023 2:32PM
Creator [redacted]
Last Update [redacted]
Updated By [redacted]

Subject: Excel Training

Note Text: Employee is to complete training by March 7th.

Save

Return to Performance Note Selection

2. Search for Performance Notes

Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.

Manager Self Service

- Approvals
- Company Directory
- Team Time
- Manage Delegation
- My Team Performance**
- Manage Schedules
- Time and Absence Reports
- My Team Information

Click on **Maintain Performance Notes**.

My Team Performance

- Create Documents
- Current Documents
- Historical Documents
- View-Only Documents
- Approve Documents
- View Approval Status
- View Status Summary
- Maintain Performance Notes**
- Transfer Document

Performance Notes

> Instructions

Selection Criteria

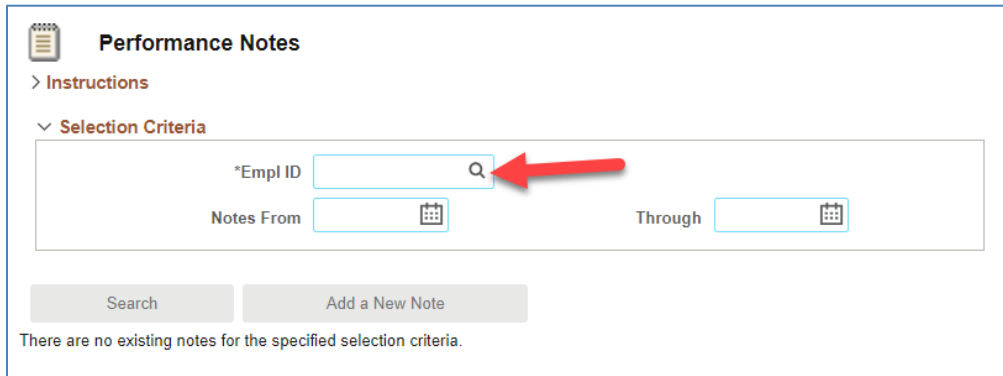
*Empl ID [input] [search icon]

Notes From [calendar icon] Through [calendar icon]

Search Add a New Note

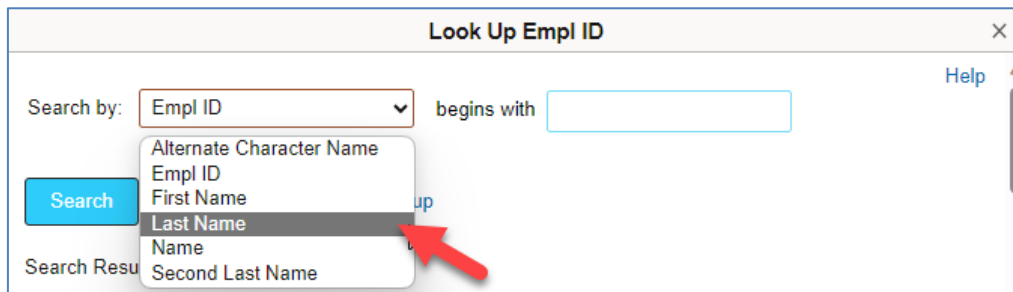
There are no existing notes for the specified selection criteria.

Click on the **Magnifying Glass**.



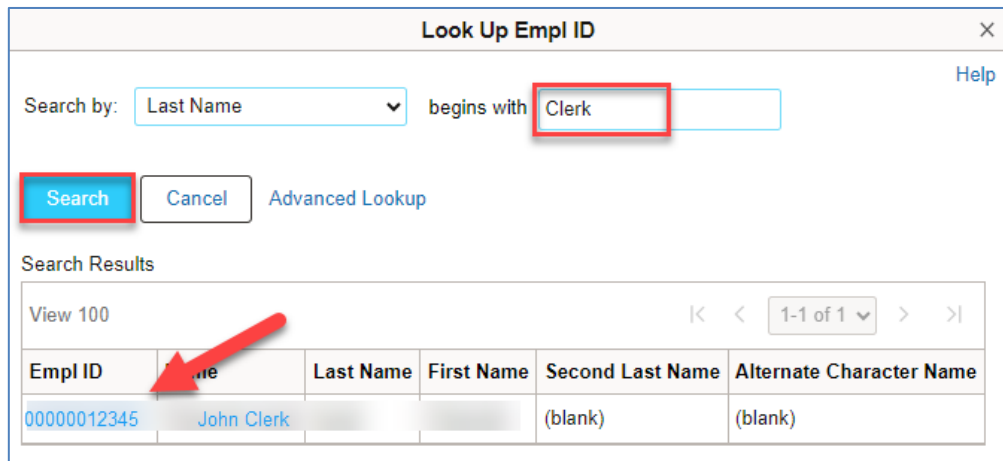
The screenshot shows the 'Performance Notes' section. Under 'Selection Criteria', there is a search bar with a magnifying glass icon. A red arrow points to this icon. Below the search bar are fields for 'Notes From' and 'Through', each with a calendar icon. At the bottom, there are 'Search' and 'Add a New Note' buttons. A message at the bottom states: 'There are no existing notes for the specified selection criteria.'

Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click on **Look Up**.



The screenshot shows the 'Look Up Empl ID' dialog box. The 'Search by:' dropdown menu is open, showing options: 'Alternate Character Name', 'Empl ID', 'First Name', 'Last Name', 'Name', and 'Second Last Name'. A red arrow points to 'Last Name'. The 'begins with' field is empty. A 'Search' button is visible on the left.

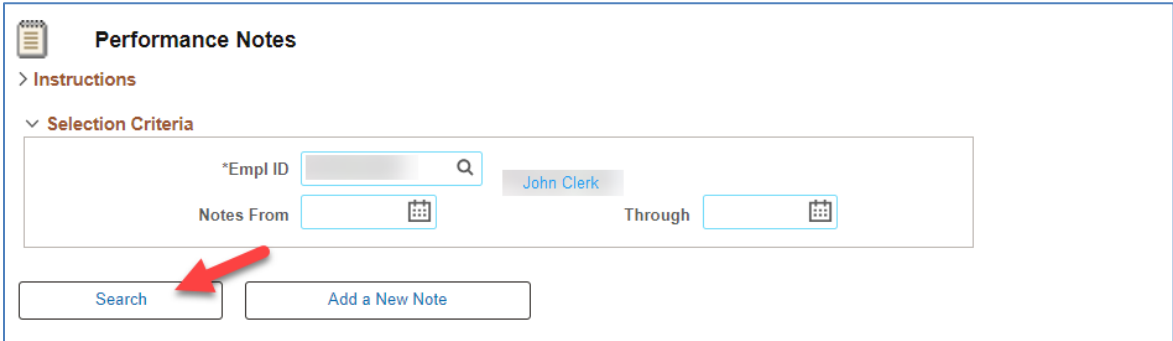
Click on the **Empl ID** for the employee.



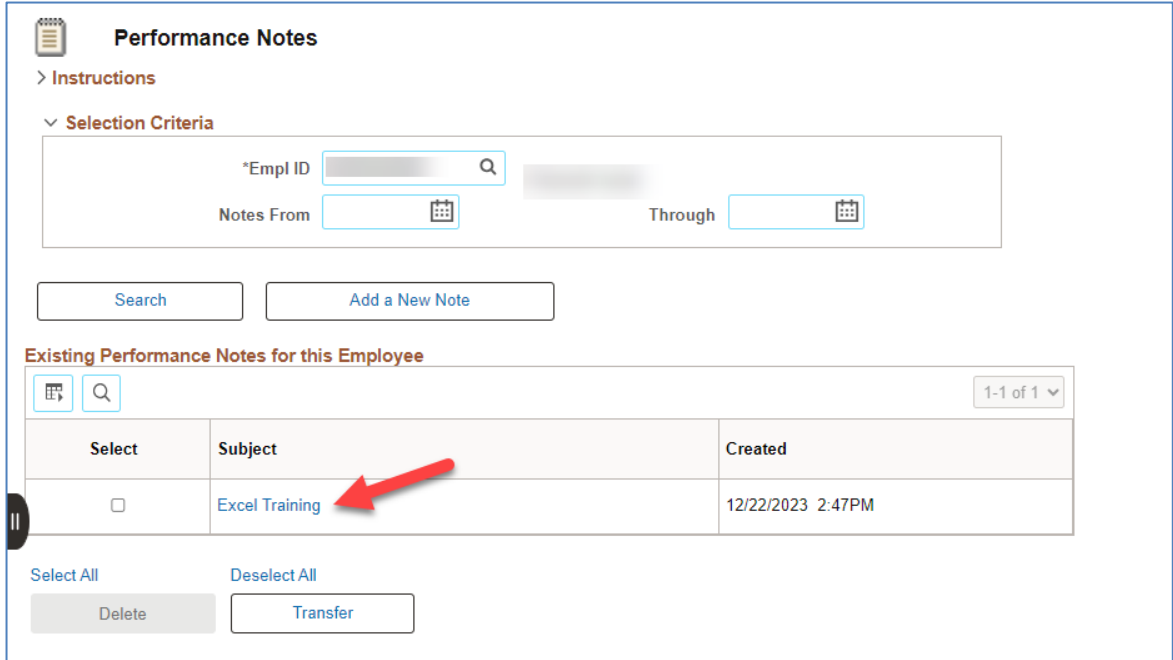
The screenshot shows the 'Look Up Empl ID' dialog box with search results. The 'Search by:' dropdown is set to 'Last Name' and the 'begins with' field contains 'Clerk'. A red box highlights the 'Search' button. Below the search fields, there are 'Search', 'Cancel', and 'Advanced Lookup' buttons. The 'Search Results' section shows a table with one result for 'John Clerk'. A red arrow points to the 'Empl ID' cell of this result.

Empl ID	First Name	Last Name	First Name	Second Last Name	Alternate Character Name
00000012345	John	Clerk		(blank)	(blank)

Click **Search**.

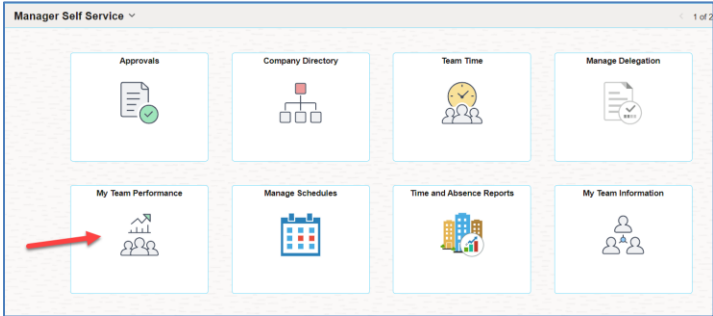


All performance notes for the employee will be displayed. Click on the performance notes **Subject** hyperlink to examine the information.



3. Edit Performance Notes

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



Click on **Maintain Performance Notes**.

My Team Performance

Create Performance Documents

Employee Selection Criteria
Select the employees you are creating new performance documents for.

As Of Date: 01/02/2024 [Refresh Employees](#)

Pamella Sawyer's employees


Select	Name	Empl ID
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]

Click on the **Magnifying Glass**.

Performance Notes

> Instructions

Selection Criteria

*Empl ID 

Notes From Through

[Search](#) [Add a New Note](#)

There are no existing notes for the specified selection criteria.

Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click on **Search**.

Look Up Empl ID

Search by: **Empl ID** begins with

[Search](#)

Search Results

Only the first 300 results can be displayed.

[View 100](#) 1-300 of 300

Click **Search**.

Performance Notes
> Instructions
Selection Criteria
*Empl ID 00000C [Search] [Date]
Notes From [Date] Through [Date]
[Search] [Add a New Note]
There are no existing notes for the specified selection criteria.

All performance notes for the employee will be displayed. Click on the performance notes **Subject** hyperlink to examine the information.

Performance Notes
> Instructions
Selection Criteria
*Empl ID 00000C [Search] [Date]
Notes From [Date] Through [Date]
[Search] [Add a New Note]
Existing Performance Notes for this Employee
1-1 of 1

Select	Subject	Created
<input type="checkbox"/>	Excel Training	12/22/2023 2:47PM

Select All Deselect All
Delete Transfer

Edit the performance note. Click **Save**.

Performance Notes - Add/Update Notes
> Instructions
Selected Performance Note
Applications
Empl ID [Redacted] Created 12/22/2023 2:47PM
Creator [Redacted]
Last Update [Redacted]
Updated By [Redacted]
Subject Excel Training
Note Text Training on February 8th in the CCLC room.
[Save]
Return to Performance Note Selection