



## Add and Review Notes

Notes may be used to document items specific to the plan. All who have access to the plan may view the notes; however, they are not included in the official performance plan.

### View or Add Notes

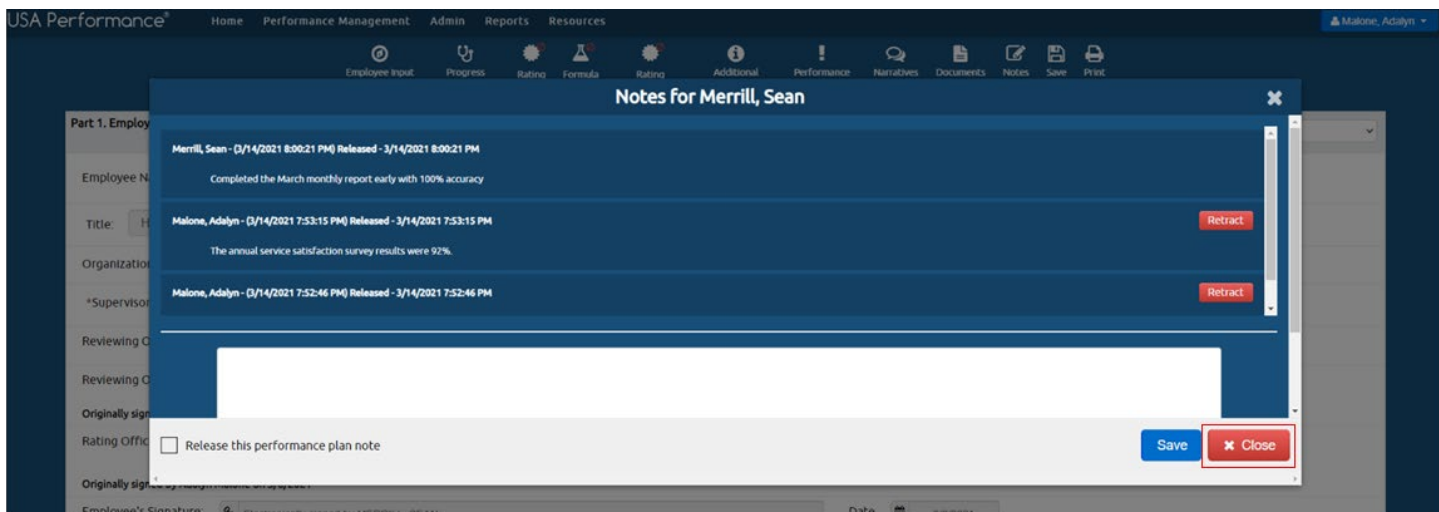
1. From an open plan, click **Notes** on the navigation bar.

The screenshot shows the USA Performance interface. The navigation bar at the top includes icons for Employee Input, Progress Review, Rating, Formula, Rating Signatures, Additional Instructions, Performance Elements, Narratives, Documents, Notes (highlighted in a red box), Signature History, Save, Print, and Profile. Below the navigation bar, the 'Part 1. Employee Input' section is visible, showing details for Merrill, Sean, including his title (HR Specialist), appraisal period (10/1/2020 to 9/30/2021), and organization (Performance Management Agency).

2. You can review any notes you previously saved and any notes your supervisor may have released to you.
3. Type your note in the text box. If you want to make the note visible to others who have access to the plan, select **Release this performance plan note**. Click **Save**.

The screenshot shows the 'Notes for Merrill, Sean' dialog box. It displays a list of notes with their release status and dates. The first note is by Merrill, Sean, released on 3/14/2021 at 8:00:21 PM, with the text 'Completed the March monthly report early with 100% accuracy'. The second note is by Malone, Adalyn, released on 3/14/2021 at 7:53:15 PM, with the text 'The annual service satisfaction survey results were 92%'. The third note is also by Malone, Adalyn, released on 3/14/2021 at 7:52:46 PM. At the bottom of the dialog box, there is a checkbox labeled 'Release this performance plan note' which is currently unchecked. To the right of the checkbox are 'Save' and 'Close' buttons. The background shows the same employee input form as the previous screenshot.

4. You will be asked to confirm your action. Click **Yes, Release Note**.
5. Your note now shows with a date, time stamp, and the note text appearing with your name.



6. Click **Close** to exit.