Supervisor Guide: Progress Notes

Progress Notes – are used to note performance items throughout the appraisal period. This is another way to maintain desk files (optional)

- This is not a required field but you may use the Progress Notes function to track individual accomplishments, recognition, areas for improvement, and/or supervisor/employee coaching sessions. Progress notes are your personal records to assist with completion of the performance evaluation process. They are employee specific and not viewable to the employee unless you wish to share it with them. However, all documented items should be professional and performance related.
- You can share your note with your employee or keep it private. Your employees can also share notes with you. Either party can also upload a document to their progress note. This is a great way to keep "Desk Files" in one area and easily accessible.
- **NOTE**: Progress Notes are not intended to serve as a formal disciplinary action; they should only provide documentation of performance related issues and/or discussions. Formal disciplinary action is be initiated outside of this system and with the involvement of the Human Resources office.
- **To create a Progress Note**
    - Once logged in, Click **'Progress Notes'** at the top bar, towards the left side of the screen
    - Click the **'Create Progress Note'** blue button on the right
    - The Progress Note window will pop up, enter Progress note information as prompted
    - **To Share:** click the **'Share this Progress Note'** arrow to make your note viewable by the employee (arrow box turns blue).
    - **To Keep private**: Do NOT click the **'Share this Progress Note'** arrow, the note will NOT be viewable by the employee (arrow box remains white).
    - To add any necessary documentation to the progress note click **'Attachment'**
        - If you click the **'Attachment'** you'll be prompted to upload the document from your computer
    - Once your progress note is complete click the **'Create'** button to save the progress note
    - A green confirmation will appear at the top of your page, confirming the note (by name) was saved. You'll then also see a running list of your progress notes.
    - You can click the **'Advanced'** button to search/sort all progress notes you have created.

If you have questions about this process please contact the Human Resources Office at (989)686-9107.