

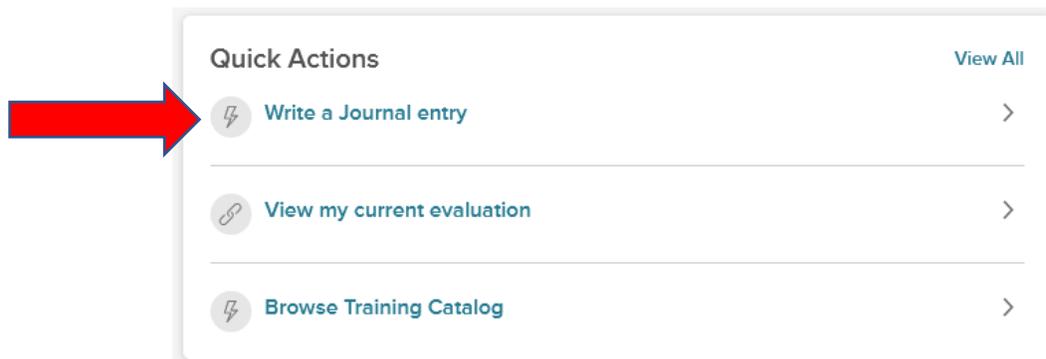
## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries

Purpose:

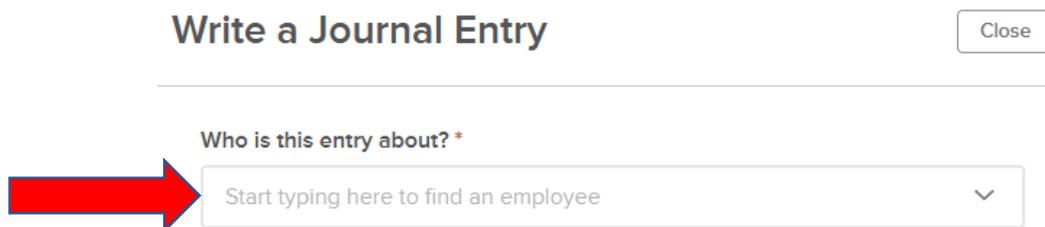
- Journal Entries can be used to keep notes throughout the year about yourself as the employee or about the employees that report to you if you are a supervisor
- As an employee, Journal Entries can be private or shared with your supervisor and are available for review when completing your evaluation
- As a supervisor, Journal Entries that you enter for your employees can be private or shared with the employee and are also available for review when completing the employee's end-of-year evaluation

Process:

1. Log into your YC portal
2. Open the Employees card and select My Perform
3. **The first way** to add a Journal Entry is to click on Write a Journal Entry in the Quick Actions box



4. Start typing your name or the name of your employee in the box labeled Who is this entry about?

A screenshot of the 'Write a Journal Entry' form. The title 'Write a Journal Entry' is at the top, with a 'Close' button. Below the title is a dropdown menu labeled 'Who is this entry about? \*'. The dropdown menu is open, showing the text 'Start typing here to find an employee' and a downward arrow. A large red arrow points to the dropdown menu.

5. Select the correct name from the list

# Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries

## Write a Journal Entry

Close

Who is this entry about? \*

edward

Name	Employee #	Agency	Division
Edward Employee	TE	Marketing	



6. Click into the text box and type in your entry. You can attach any relevant documents, add links, or add images by clicking on the appropriate icons at the top of the text box. You can also tag the comments to match the performance management competencies by entering @ followed by the competence name (Service Excellence, Learning Excellence, Relationship Excellence, Job Knowledge & Functions).

New Entry      Past Entries

**B**   *I*   U

Great job leading the work group today.

[Job Knowledge & Functions \(Staff\)](#)

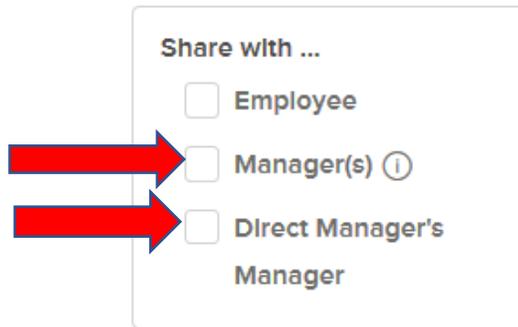
Draft Autosaved on 12/1/2021, 9:50:05 AM



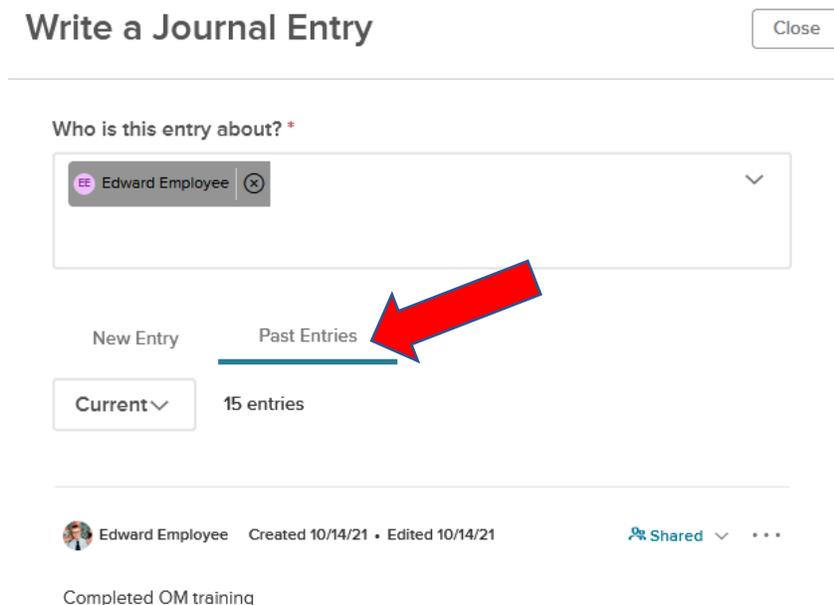
Did you know? You can tag your journals with Competencies and Goals from recent/upcoming evaluations by typing "@" along with the name of the item. Tagging is only applicable for one user at a time.

## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries

7. If you want to share this message with the employee (if you are their supervisor), your supervisor, or your supervisor's supervisor, click in the appropriate box (you **don't** need to click in Employee box to have access to your own Journal Entry)



8. If you want to review past journal entries prior to saving this one, click on Past Entries



9. When you are finished with the new Journal Entry, click on Submit Journal Entry at the bottom. If you are not ready to submit the entry, you can choose Keep as Draft and it will be saved for you to edit later, but not shared with anyone until you Submit.

## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries

Who do you want to share this entry with?

- Employee
- Manager(s) ⓘ
- Manager's Manager

Discard Draft

Keep as Draft

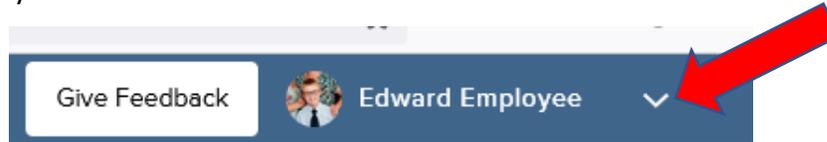
Submit Journal Entry

10. Click on Close at the top right of the fly-out

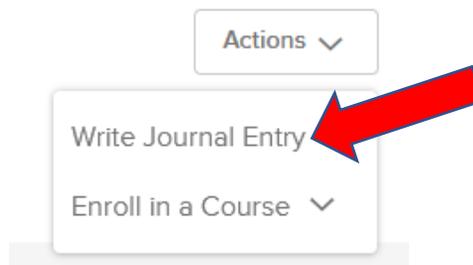
Write a Journal Entry

Close

11. **A second way** to add Journal Entries is from your NEOGOV Dashboard. You can add Journal Entries for yourself through your Profile page, by hovering over your name on the top right and selecting My Profile.

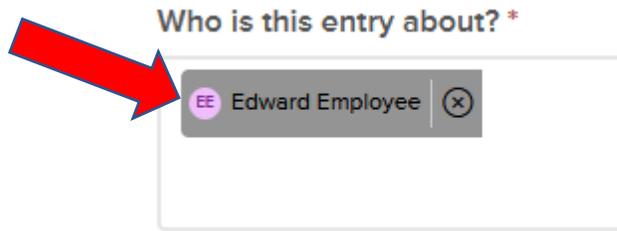


12. Click on the Actions button near the top right and select Write a Journal Entry

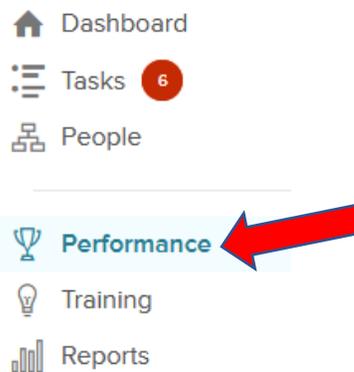


13. On the fly out screen, notice that your name is already entered. Follow steps 6 to 10 above to make an entry.

## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries



14. **A third way** to create a Journal Entry from the NEOGOV Dashboard is to first select Performance from the left menu.



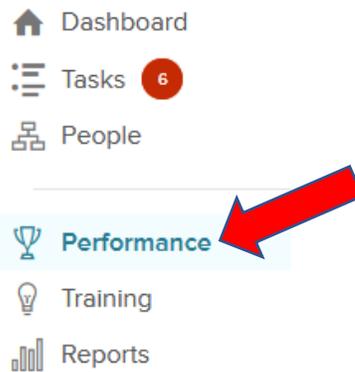
15. From the Performance screen, you will always see the Journal Entry button whether you are in Overview, My Evaluations, or Journal Hub

### Performance

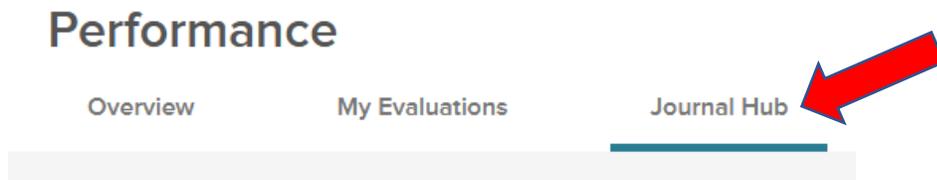


16. Click on Journal Entry and follow steps 4 to 10 above.
17. **To review all Journal Entries** (your own and your employees'), from your NEOGOV Dashboard, click on Performance from the left menu.

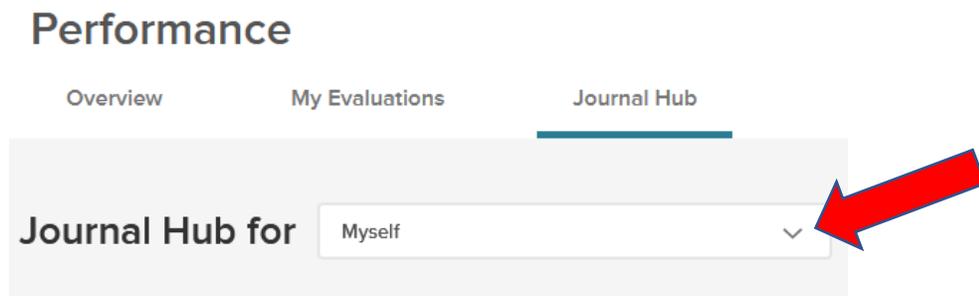
## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries



18. Select Journal Hub from the top menu

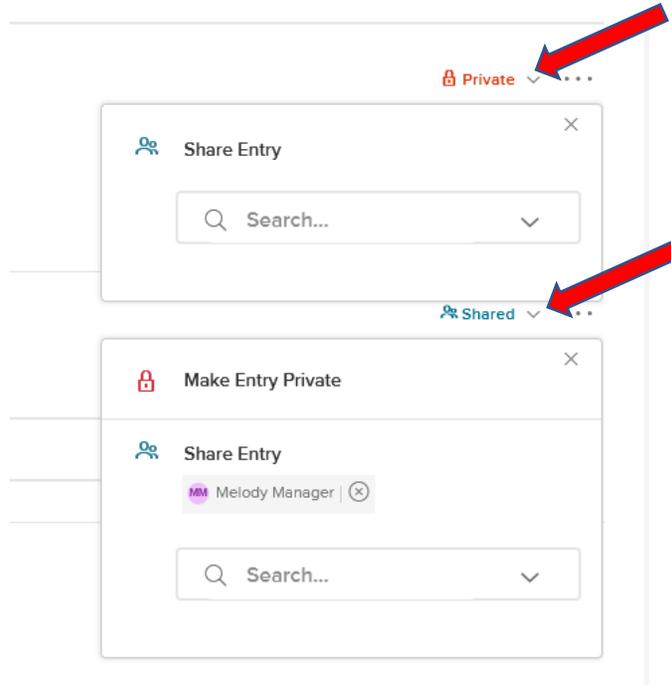


19. This page defaults to your own Journal Hub. If you are a supervisor, you can search for your employee(s) in the drop-down menu to see their Journal Entries



20. From here you can share any entries that you have made with your employee (if you are a supervisor), with your supervisor, or with supervisor's supervisor, even after you have saved the Journal Entry, by clicking the Private or Share drop-down to the right of each entry and entering the person's name.

## Performance Management EMPLOYEE & SUPERVISOR Using Journal Entries



21. You can also edit, archive, or delete Journal Entries by clicking on the ellipsis (3 dots) to the right of the entry and making the appropriate selection from the drop-down menu.

