



Performance Management

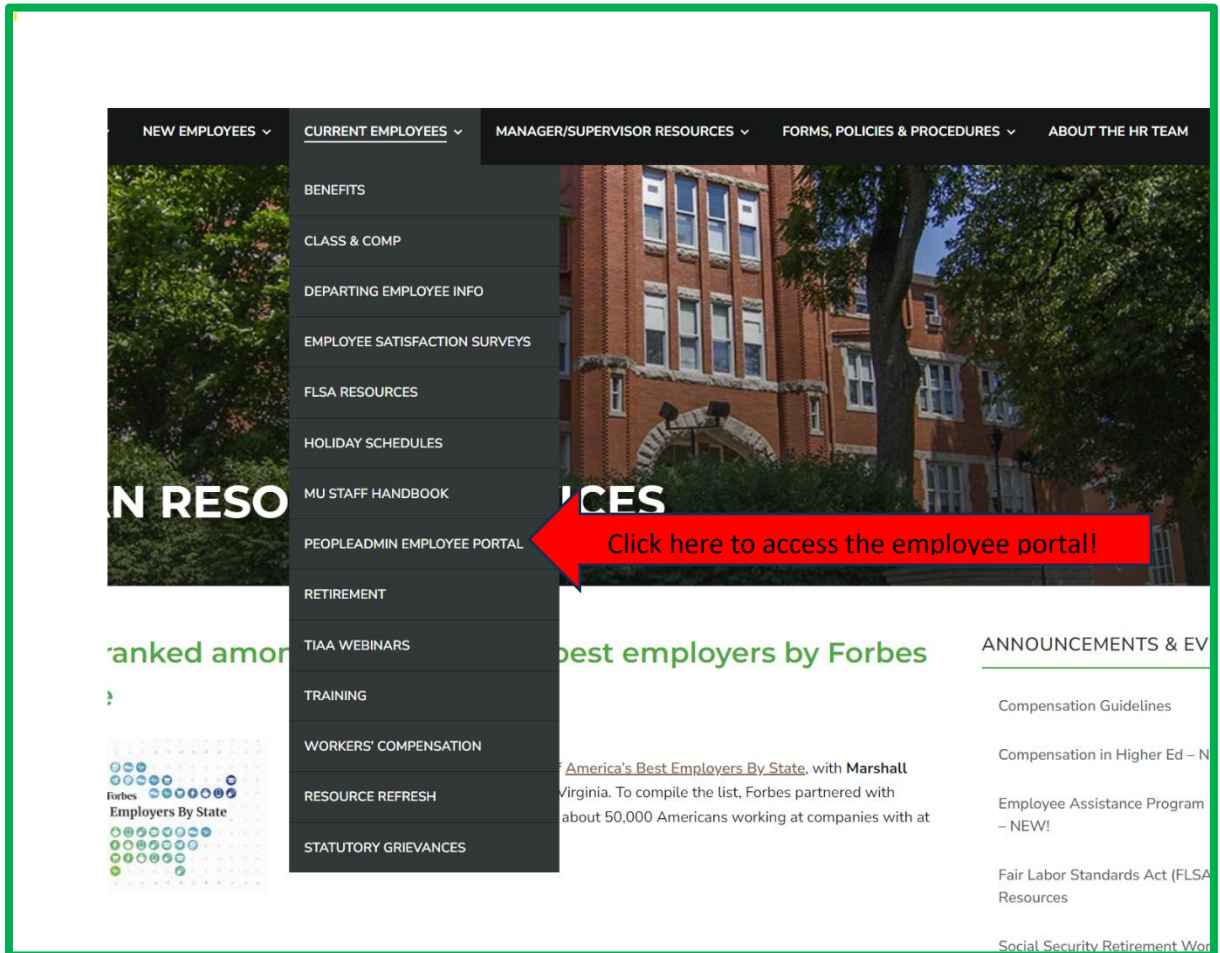
How to Create

Progress Notes

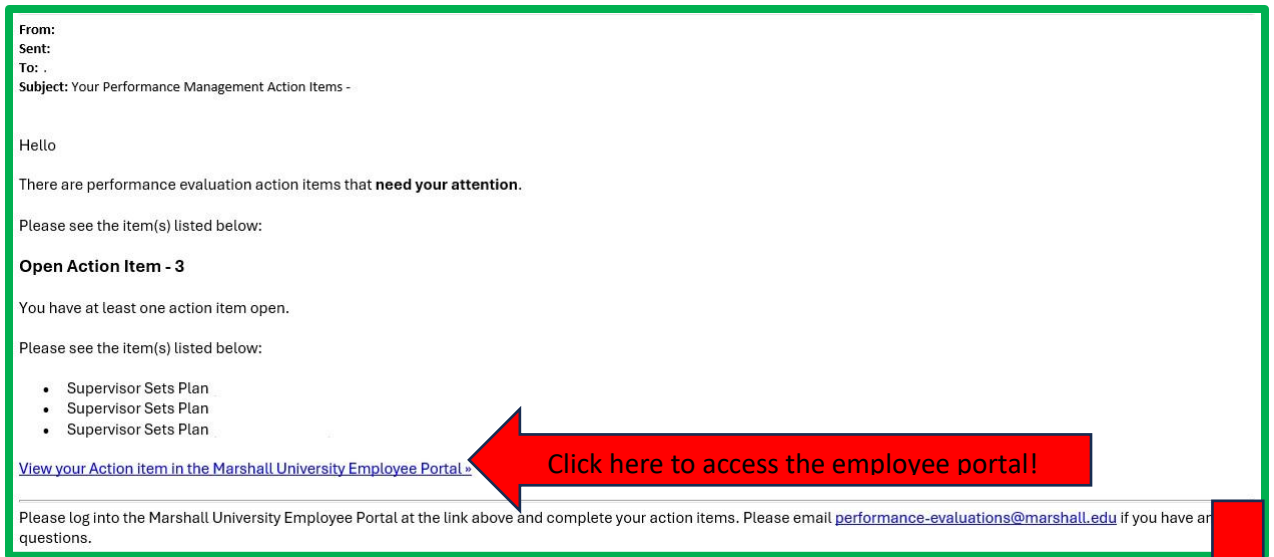
Accessing the Employee Portal

There are three ways to access the Employee Portal.

1. You will access it from the [HR page](#). You will choose the “Current Employee” tab at the top. When the drop-down menu appears, you will choose the PeopleAdmin Employee Portal.



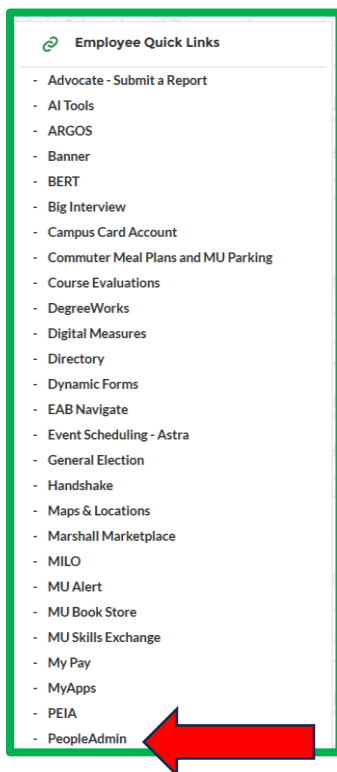
2. You can access the portal via the email notifications sent to you from PeopleAdmin.



3. You can access the portal through myMU



You will look for Quick Links and choose the PeopleAdmin icon.

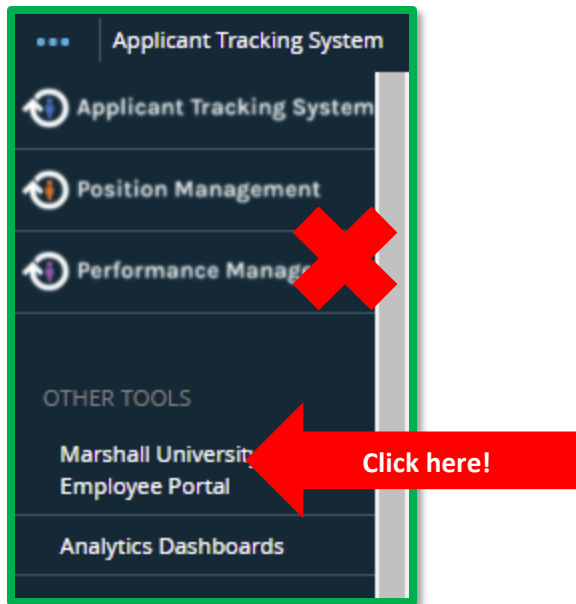


You will then click the red “Marshall University Employee Server Log-In” link.

Do not enter your username and password on this screen!

The image shows a login screen for Marshall University. At the top is the Marshall University logo, which consists of a large green 'M' with the word 'MARSHALL' in white capital letters across its center. Below the logo is a red link that says 'Marshall University Employee Server Log-In'. A red arrow points from the right side of the screen to this link, with the text 'Click here!' next to it. Below the link are two white input fields: the first is labeled 'Username' and the second is labeled 'Password'. Below these fields is a blue button with the text 'Log In'. At the bottom of the screen, there is a link that says 'Authenticate with single sign-on? SSO Authentication'.

You will click the three dots in the top left-hand corner. Then select the Marshall University Employee Portal (you will not select the Performance Management on this screen).



Creating Progress Notes

Employees and their supervisors can both create progress notes in the evaluation module. It is encouraged to add progress notes throughout the evaluation year.

You will click the “Progress Notes” in the black bar about the listing of tasks.

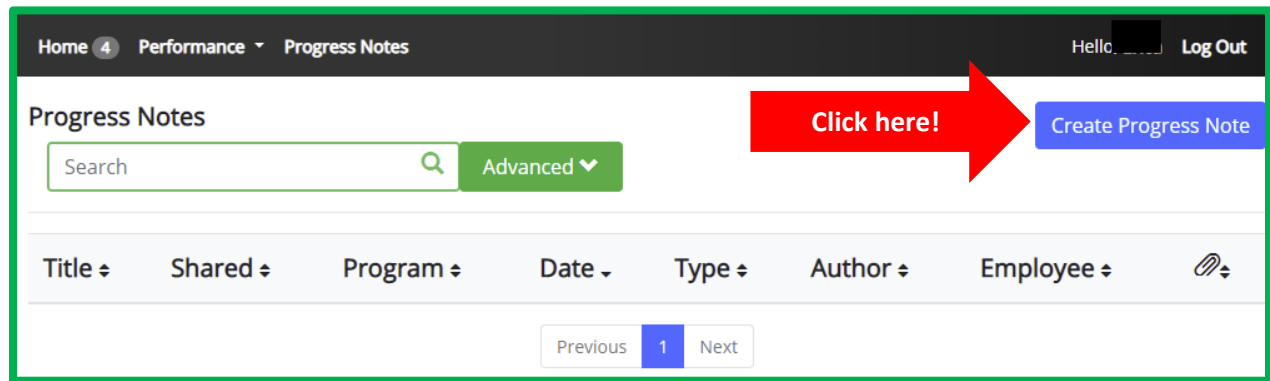
Home 4 Performance Progress Notes Click here!				
Task	Task Owner	Date Opened	Date Completed	Due Date
1 Supervisor Sets Plan			2021-07-19	
2 Mid-Year Check-In			2021-07-19	
3 Employee Self Evaluation			2021-07-19	
4 Supervisor Evaluation			2021-07-19	



Adding Progress Notes

Progress Notes

Once you have logged into theTo add a note, you will click the “Create Progress Note” blue button. A new window will pop up to enter the information for the note.



To create a progress note, you will:

1. Select the evaluation year using the Program drop-down menu.
2. Select the individual you wish to add a new progress note using Employee drop-down menu.
3. Select the Step you wish to associate with your progress note.
4. Select the type of progress note using the Type drop-down menu.
5. Enter a title for the note.
6. Enter information in the Comment box about your progress note.

You can add any supporting documentation to the “Attachment” blue button. You can also share the Progress Note using the box with a “forward” arrow. For example, you can share with the next line supervisor about your progress note for your employee or an employee can share progress notes with their supervisor.

When you have entered the information, you will click create to save your progress note.

New Progress Note

Program *(optional)*

Annual Evaluation 2021 - Training

Employee *

Step *(optional)*

Supervisor Evaluation

Type *

Original Progress Note

Title *

Performance

Comments *

Handouts

Share this Progress Note

Attachment

Click to save!

Create

Cancel

You can view the progress notes on the Progress Note tab. Those that are “Private” are not shared with the employee and are for your record only.

To view the note, you will click the blue text in the Title column.

Progress Notes

Create Progress Note

Advanced ▾

Title ▾	Shared ▾	Program ▾	Date ▾	Type ▾	Author ▾	Employee ▾	
Performance	private						
Performance	shared						
New							

Previous

1

Next

If it is a note you created, you can edit and save the changes or you can delete the note.

Performance

×

Program

Annual Evaluation 2021 - Training

Employee

Step

Mid-Year Check-In

Type

Original Progress Note

Shared

Private

Comments

Test

Delete

Edit

Cancel