NEOGOV PE - SETTING UP AN EMPLOYEE PERFORMANCE PLAN 2017
Quick Reference Guide

NOTE: It is recommended that you view the video and review the detailed instructions located on your self-service Performance Management main page within the "NEOGOV PE Instructions" link prior to utilizing this Quick Reference Guide.

To Create a Performance Plan for Your Direct Reports:

1) Sign in to your MI HR Self-Service Account
2) Click on "Performance Management"
3) Click on "NEOGOV PE Login"
   a) enter your NEOGOV user ID & password (user ID is your email address including @michigan.gov)
   b) click on the "Sign In" button
4) Scroll down to the Direct Reports Section, and click on the icon for the employee whose plan you are setting up.
5) Under the "Performance Evaluations" section, click on the Evaluation Name (dates) of the plan you are setting up.
6) Required objectives for the employee should be pre-loaded and should <u>not</u> be deleted; if there are no objectives pre-loaded, contact Lynn Simons in OHR, 517-373-6014, for assistance. Additional position-specific objectives <u>should</u> be added for each Group 2, 3, 4 and SES employee; bureau director approval is required before adding additional objectives to the performance plan of a Group 1 employee.
   a) If additional common objectives have been identified and added to the PE library for your bureau, add these by clicking on the "Add Items" box, then "**From Objective Library.**" To select an objective, click in the box next to the objective. (Note: you can search for LARA specific objectives by clicking on the magnifying glass and then typing "6401" in the search bar next to the magnifying glass. Place a checkmark next to the objective(s) you want. You can select more than one objective at a time.) Click "Save."
   b) If additional **employee-specific objectives** are to be used, click on the "Add Items" button again and select "New Objective."
   c) Type the objective in the "Title" field. If the description is too lengthy for the field, type only a basic description and then enter additional clarifying information in the "Description" field. (Note: there is a limit of 200 characters for the "Title" field.)
   d) Select the Objective Category (If it is an overall Division objective, use "Division"; otherwise select "Employee")
   e) Enter any additional appropriate information about the objective in the "Description" field. (Note: The information in the Description field will <u>not</u> be included on the form if you print the plan.)
   f) Click the "Save" button.
   g) To change/edit an existing objective, click on the edit (/) button in the Actions column, make desired changes, then click "Save".

h) To add one or more objectives to all your direct reports at the same time (**Bulk Action**), please see, "Add Objective for Employee Using Bulk Action Tool" instructions.

7) Repeat items 7b through 7f for each additional objective you wish to add.
8) The required competencies for the employee will be pre-loaded to the plan. Competencies should not be added or deleted.
9) To add notes or attachments to the plan, click on the "Add Notes & Attachments" button in the "Notes & Attachments" section. (Optional)
10) When plan is complete, click the "**Start Evaluation**" button located in the Evaluation Detail section at the top of the screen. A box will appear: "you are about to resume the process of this evaluation. It will no longer be in Draft status. Do you wish to continue?" Click "Continue." (Note: If you need to make changes to the plan later, see the "To Modify a Previously Published and Certified Plan" section below)
11) The manager must review the plan with the employee; it is recommended that this be done using the on-line tool and not by printing it. If a paper copy of the plan is necessary, the manager may print the plan after it is started by clicking on the "Print" button in the "Evaluation Detail" section at the top of the screen; remember that only that portion of the objectives that are listed in the objective "title" will show on the printed version.
    a) The employee must "acknowledge" the plan using the NEOGOV PE: Employee Certification of Performance Plan instructions available from the LARA OHR Performance Management website.
12) To set up a plan for the next subordinate, click on "My Profile" located under your name in the upper right corner of the screen and repeat items #4 through 11.
13) To log out of NEOGOV, put your cursor over the down arrow next to your name in the upper right corner of the screen and select "Sign Out"

To Modify a Previously Published and/or Certified Plan:

1) Click on the "Pause Evaluation" button located in the Evaluation Detail section at the top of the screen.
2) Make all required modifications to the plan
3) Click on the "Start Evaluation" button located in the Evaluation Detail section at the top of the screen.
4) Notify employee that they must certify the modified plan

Note: You can return to your main/home screen at any time by clicking on "My Dashboard" located in the upper left area of the screen.

Link to detailed performance plan instructions: http://www.michigan.gov/documents/mdcs/3-Manager_Create_and_Publish_Evaluation_408999_7.pdf

Link to all NEOGOV PE Tutorials: http://www.michigan.gov/mdcs/0,4614,7-147-7213-293190--,00.html