NEOGOV PE

How To

Module #1	Employee Overview of PE
Objective:	This How To provides an overview of the PE system. For specific instructions on performance (evaluation) plans, please go to Module #4.

Pre-Module Requirements:

- Employee has received access to the system.

Glossary:

- Performance plans can also be called Evaluation Plans.

Steps:

1. In MI HR Self Service, click on the **Performance Management** bookmark.

2. In the Performance Management bookmark are links to the following:

   A. **NEOGOV PE login**
   If you have been provided with an email to access NEOGOV PE, use this link.

   B. NEOGOV PE instructions
   For information on how to use NEOGOV PE including an overview of the system, use this link.

   C. **HRMN PM login** (HRMN Performance Management system)
   If you have current plans in the HRMN PM, you will finish your plan there before using NEOGOV PE. Therefore, use this link.

   D. **HRMN PM instructions**
   For information on how to use HRMN PM, use this link.

3. You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**.

   PLEASE NOTE: Current NEOGOV Insight HR Users will use their Insight username and password.

4. Log into the NEOGOV PE site using your **Username** and **Password**. Click on the **Sign In >>** button.

5. Upon login, the first page you will see is your **My Dashboard** screen. The employee dashboard serves as your personal homepage. It contains a section for assigned tasks and a section to track your own objectives from performance (evaluation) or development plans.

6. Your manager/manager/supervisor name will appear beneath the **Manager/manager/supervisor** icon if you hover over the picture with your mouse. You will also see the Civil Service classification, department, direct manager/manager/supervisor (if available) and number of direct reports. There is an option to send an email as well.

7. The **My Tasks** section displays a complete list of your current tasks including personal tasks you have created and others related to performance (evaluation) or development plans assigned to you. My Tasks are covered in detail in Module #6. The **Related To** column indicates the purpose of the task and provides a direct link to that item.

8. Only current tasks are displayed by default. You can review completed tasks also by clicking the **All Tasks** button.

9. Columns can be sorted using the **Sort** symbol within the column header. Edit or delete a task by clicking the icons within the **Action** column.

10. The **My Objectives** section displays a list of all objectives assigned to your performance (evaluation) or development plan. My Objectives are covered in more detail in Module #4.

11. Click on **Employee**.

12. **Employee Details** contains employment information such as position (Civil Service classification), department, start date, and performance schedule.

13. This page also allows you to view or add **Tasks** and view or add **Notes & Attachments**. Notes & Attachments are covered in more detail in Module #6.

14. To return to your Dashboard, click on **My Dashboard** link in the upper-left corner or the **NEOGOV PE** logo at the top of the screen.

15. Click on **Performance**.

16. The **Performance** Screen includes the Overall Rating associated with your current plan. This will display as Pending until the evaluation is complete.

17. **Performance (Plan) Evaluations** will include your current performance (evaluation) plan including the name (Jan 1-Dec 31 2013 in this example), type of plan (periodic or probation), and date due.

18. **Development Plans** are not required but can be created together with your manager/manager/supervisor to track development of skills for future career growth.

19. **My Objectives** includes objectives assigned in your current performance (evaluation) plan.

20. **My Competencies** includes competencies assigned in your current performance (evaluation) plan.

21. Click on **Activity Stream**.

22. **Activity Stream** is associated with functionality not being used by the State of Michigan at this time.

23. Click on **Reports**.

24. **Reports** available to the employee are specific to their performance (evaluation) plan review.

25. Click on **Org Chart**.

26. **Org Chart** will display your organizational placement based on your reporting relationship. Clicking on the up arrow will display your manager/manager/supervisor/direct manager/supervisor.

27. You may be able to click up through higher levels in your organization if additional arrows appear. You will only be able to **Search** on your record. These settings are controlled by security.

28. Click on **My Dashboard** to exit Org Chart.

29. Click on **Employees**.

30. The **Employee List** will display your own employee record. To access your employee profile, click the first name, last name, or employee number. This will take you to the Employee Details page as will Step 11 of this module.

31. To return to your Dashboard, click on **My Dashboard**.

32. Select **Objectives**, then **Objective List** from the drop-down menu.

33. Department strategic objectives will appear in the **Objective List** as they are added by departments. Departments can track progress toward completion of these objectives through the alignment functionality. Manager/manager/supervisors may select objectives from the Objective List for inclusion on some employee plans.

34. Also available from the drop-down is the **Objective Org Chart**. This chart will be created from the objective list for those agencies that will be adding and aligning strategic objectives for their department. The structure will be captured in the Objective Org chart. What you see in this area will depend on how your department chooses to use the objective alignment functionality.

35. Click on **Competencies**.

36. The **Competency List** will display all of the State of Michigan competencies available for performance (evaluation) plans. Clicking on the name of any Competency will reveal the description, which is also available on this screen.

37. Click on **Trainings**.

38. The **Training** functionality is not being used by the State of Michigan at this time.

39. Also available along the upper-right of your screen are links to your **Messages**, **Calendar**, and **Task Listing**.

40. Further, if you hover over your **Name** a profile menu will display. This menu provides quick access to your employee profile (**My Profile**), the PE Help Center (**Help & Training**), profile **Settings**, or **Sign-Out**.

41. To log-out, select the down arrow next to your name in the upper-right corner. A drop-down will appear. Select **Sign Out**.

Additional Resources:

NEOGOV PE Tutorial
Help & Training available in PE in the drop-down under your name (top right corner)
PE Glossary
PE FAQs
For questions on the new system or this job aid, email MCSC-NEOGOV@michigan.gov
For questions on performance management plans, contact your HR Office