

<b>Module #3</b>	Creating a Performance (Evaluation) Plan that is Ready for Review (Published)
<b>Objective:</b>	This How To focuses on creating a performance (evaluation) plan that is ready for review (published) and rating.

**Pre-Module Requirements**

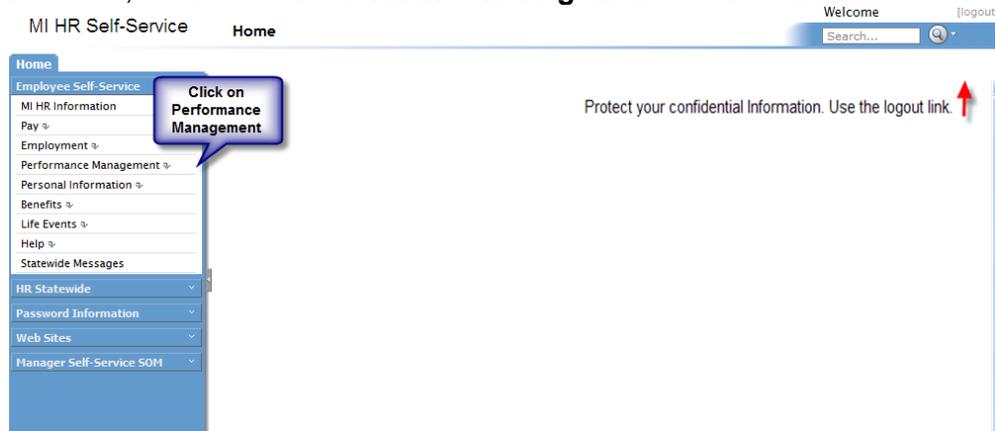
- Manager/Supervisor has received access to the system.

**Glossary**

- Performance plans can also be called Evaluation Plans.

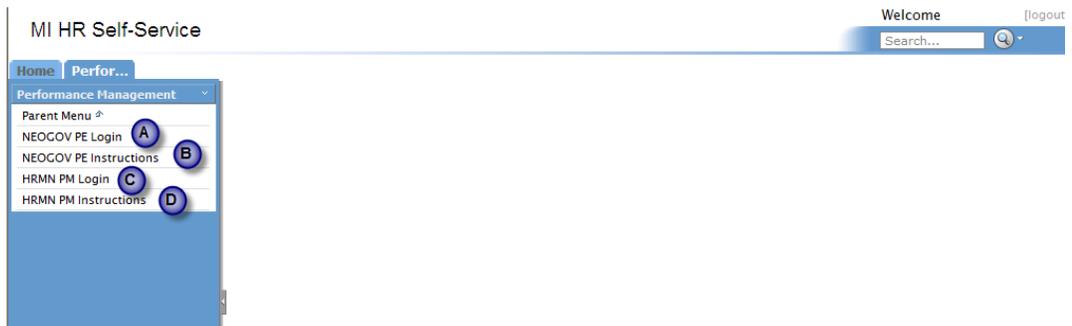
**Steps:**

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.

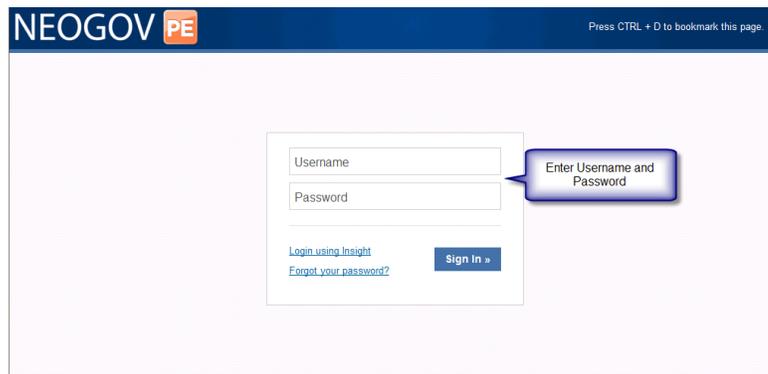


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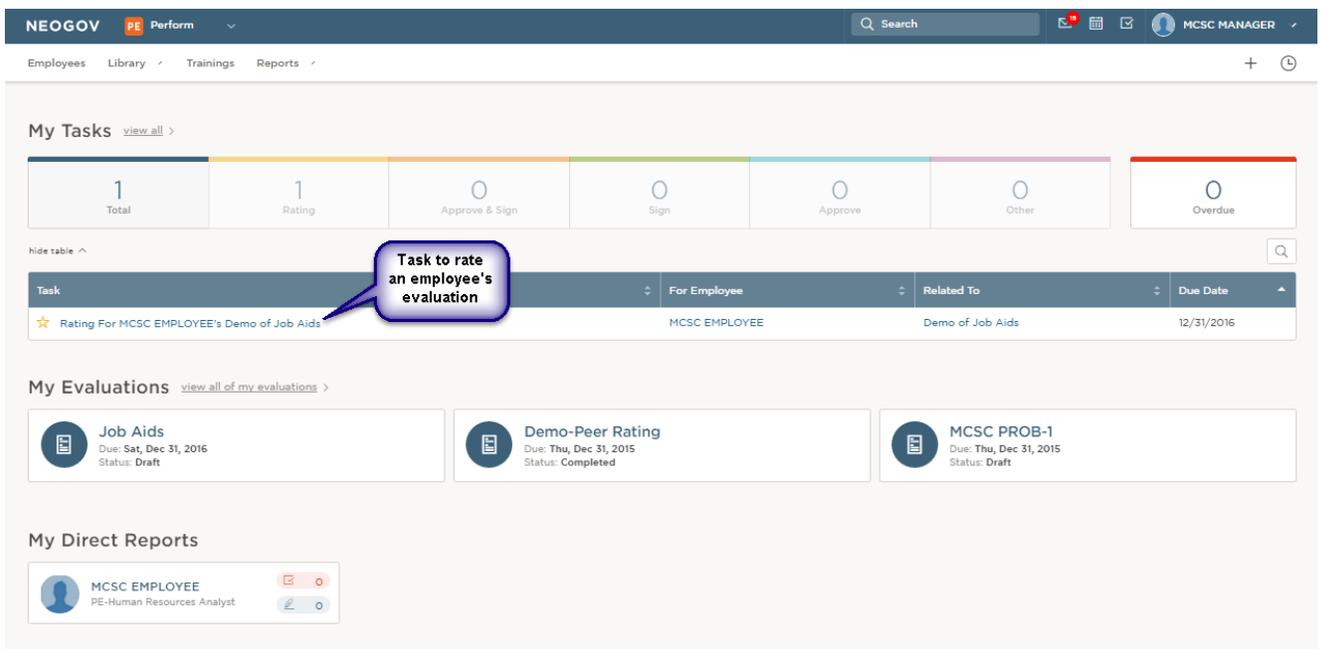
3. You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**.

**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 **Sign In >>** button.



5. When you log in, you'll arrive at your **My Dashboard**.
6. Employee performance (evaluation) plan templates will be established for all employees. These templates may include tasks to self-rate your own plan and rate your direct report's plans. You will see these tasks in your **My Tasks** section of the dashboard.



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7. Click on your **Direct Report(s)**.

The screenshot shows the NEOGOV Perform dashboard. At the top, there is a navigation bar with 'NEOGOV PE Perform' and a search bar. Below the navigation bar, there are tabs for 'Employees', 'Library', 'Trainings', and 'Reports'. The main content area is divided into three sections:

- My Tasks:** A summary bar showing 1 Total task, 1 Rating task, 0 Approve & Sign tasks, 0 Sign tasks, 0 Approve tasks, 0 Other tasks, and 0 Overdue tasks. Below this is a table with columns for Task, For Employee, Related To, and Due Date. A task is listed: 'Rating For MCSC EMPLOYEE's Demo of Job Aids' for 'MCSC EMPLOYEE' related to 'Demo of Job Aids' due on '12/31/2016'.
- My Evaluations:** Three cards showing evaluation details: 'Job Aids' (Due: Sat, Dec 31, 2016, Status: Draft), 'Demo-Peer Rating' (Due: Thu, Dec 31, 2015, Status: Completed), and 'MCSC PROB-1' (Due: Thu, Dec 31, 2015, Status: Draft).
- My Direct Reports:** A card for 'MCSC EMPLOYEE' (PE-Human Resources Analyst) with a callout bubble that says 'Click on Direct Report'.

8. You will be taken to your direct report's **Employee Detail** page.

The screenshot shows the 'Employee Details' page for 'MCSC EMPLOYEE' (PE-HUMAN RESOURCES ANALYST). The page is divided into three main sections:

- Employee Profile:** Shows the employee's name, title, and a list of links: 'Employee', 'Reports', 'Org Chart', and 'Manager'.
- Employee Details:** A table of employee information:
 

Employee #:	456321	Class Spec:	PE-HUMAN
Email:	peapi+employee@mitraining.com		RESOURCES
Position:	PE-Human		ANALYST
	Resources Analyst	Department:	PE-CIVIL SERVICE
Address:			COMMISSION
Phone:		Division:	
Active:	Yes	Online Access:	Activated
		Start Date:	05/07/2006
		Separation Date:	
- Performance Evaluations:** A table showing a list of evaluations:
 

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Description	Archived
Job Aids	Periodic	12/31/2015	Not Started			No

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9. The performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.
10. Click on the plan (evaluation) name.

The screenshot displays the NEOGOV PE Perform user interface. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown, a search bar, and user information for 'MCSG MANAGER'. Below the navigation bar are tabs for 'Employees', 'Library', 'Trainings', and 'Reports'. The main content area is divided into three sections: 'Employee Details', 'Performance Evaluations', and 'Development Plans'.

**Employee Details:** This section shows information for an 'MCSG EMPLOYEE' (PE-HUMAN RESOURCES ANALYST). Key details include:
 

- Employee #: 456321
- Email: peapi+employee@mitraining.com
- Position: PE-Human Resources Analyst
- Address: Resources Analyst
- Phone: (blank)
- Active: Yes
- Class Sr: MAN
- Department: PE-CIVIL SERVICE
- Division: COMMISSION
- Online Access: Activated
- Start Date: 05/07/2006
- Separation Date: (blank)

**Performance Evaluations:** This section features an 'Evaluation List' table. A callout bubble with the text 'Click on the Evaluation Name' points to the 'Job Aids' entry in the first row. The table has the following data:
 

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Description	Archiv
Job Aids	Periodic	12/31/2015	Not Started			No

**Development Plans:** This section includes a '+ Add' button and a table with the following data:
 

Development Plan Name	Begin Date	End Date	Actions
Demo	06/16/2015	06/18/2015	[Edit] [Delete]
Testing for Demo	11/16/2015	11/30/2015	[Edit] [Delete]

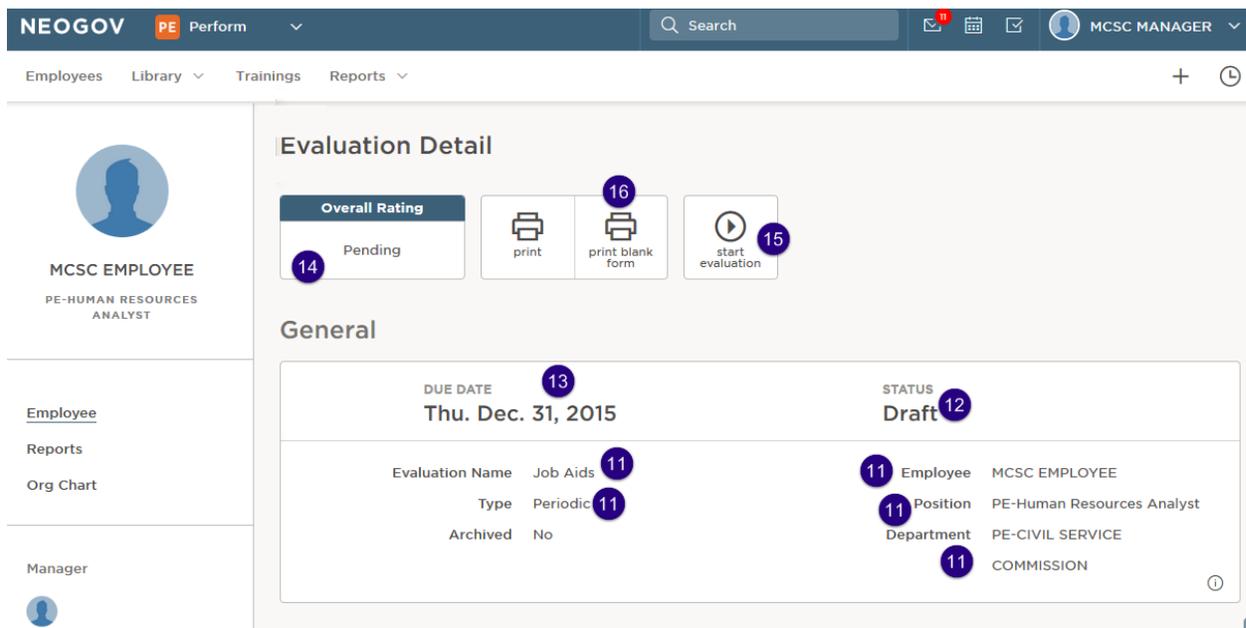
**Tasks:** This section includes a '+ Add' button and a table that currently displays 'No matching records'.

**Notes & Attachments:** This section includes a '+ Add' button and a table with the following data:
 

Note/Attachment	Created By	Created On	Actions
No matching records			

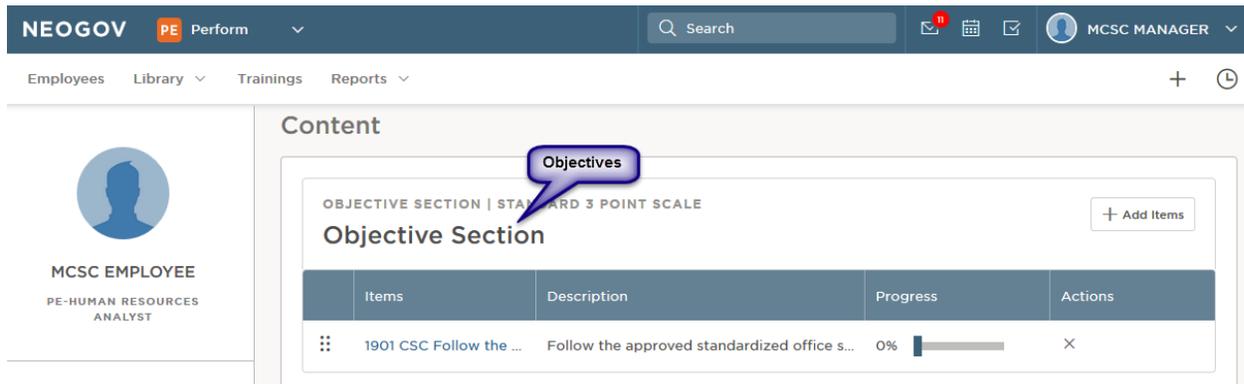
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11. The **Evaluation Detail** page lists information specific to the employee’s performance (evaluation) plan including department, evaluation name, type (periodic or probation), position, and employee name.
12. The performance (evaluation) plan template will be in **Draft Status** upon receipt and will remain in that status until it is started/ready for review.
13. Most agencies have established performance (evaluation) plan dates. The dates you receive will reflect the established dates for your agency or organizational unit including the **Due Date**. (Probationary plans will be covered in a separate module.)
14. Performance (evaluation) plans will continue to utilize a rating based on the 3-point rating scale for each objective and competency as well as an **Overall Rating**. The **Overall Rating** will display as Pending until the performance (evaluation) plan review has been completed.
15. After consultation with the employee regarding assigned objectives and competencies, the plan (evaluation) will need to be started/made ready for review by clicking on the **Start Evaluation (Play Button)**. When a plan is started/ready for review, the plan is locked until the review (evaluation) is due. The manager/supervisor and the HR Office retain the ability to revert the plan to draft status should changes need to be made to it at a later date.
16. If your agency is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.



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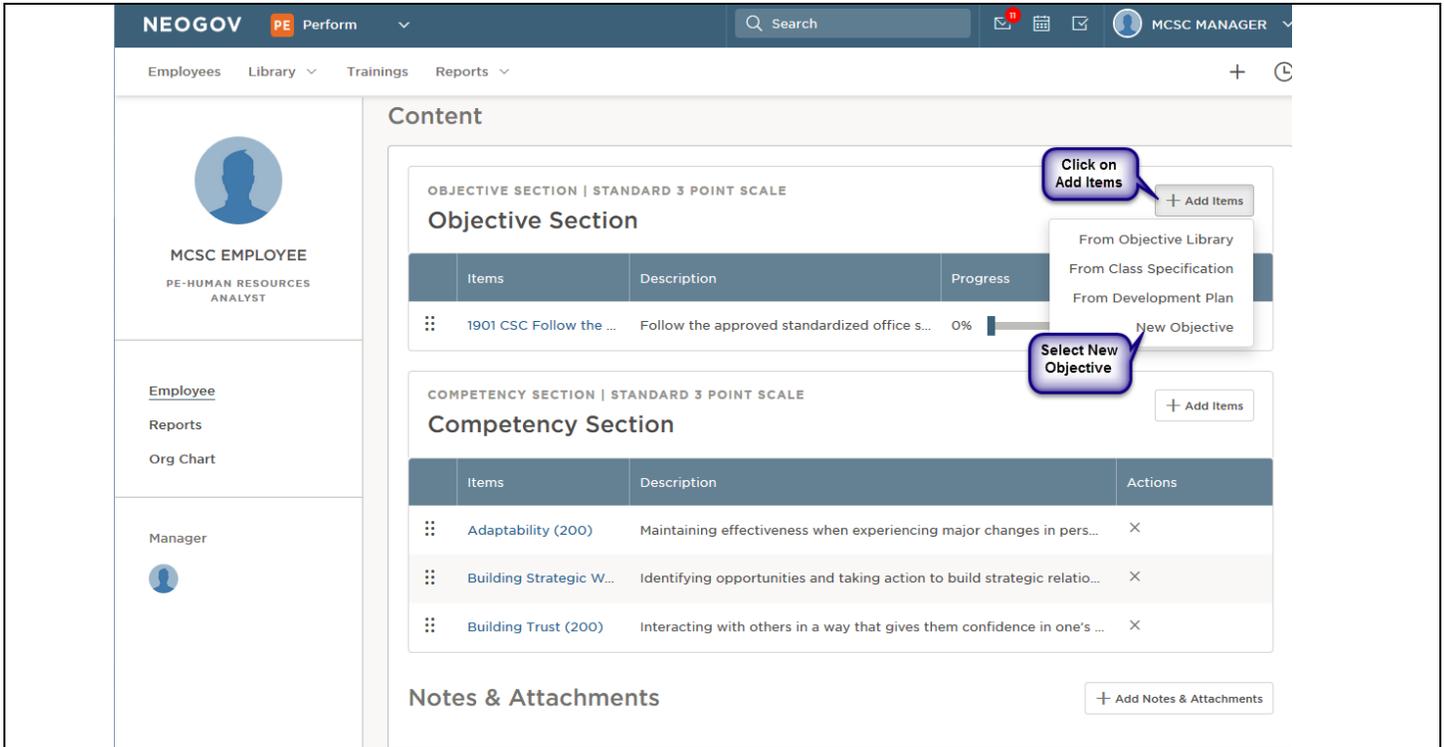
17. **Objectives** are the individual actions that the manager/supervisor and employee agree the employee will be rated on in this performance (evaluation) plan for this rating period. Objectives should be SMART (Specific, Measureable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating SMART objectives.



18. **NOTE:** Employees can edit/add/delete objectives until the performance (evaluation) plan is started/ready for review (published). In working with your direct report(s), you may solicit their assistance in the addition of objectives. Employees will follow Module #4 for updating their performance (evaluation) plan.

19. To add objectives to the plan, click on **Add Items** and select **New Objective**. (Department strategic objectives will be available **From Library**. If your department is using this functionality, you will be instructed on what to select from the library. The State of Michigan is not using objectives **From Class Specification**.)

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20. The **Add Objective** box will appear.

**Add Objective** Cancel Save

**Title**

**Description**

**Category**  ▼

21. Add an objective in **Title**.

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22. **Enter a Description** to ensure both the employee and manager/supervisor are clear on what the objective is intended to achieve and how it will be measured.
23. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Objective categories are outlined below:
  - **Department Plan** objectives are associated with the department’s strategic plan, mission, vision, etc.
  - **Strategic Plan** objectives are associated with the strategic plan, initiatives, projects, business plan, etc.
  - **Employee** objectives are associated with the employee's activities for the review (evaluation) period.
24. Click on Save

Add Goal
Cancel
Save

**Title**

**Description**

This objective is measured by the annual survey.

**Category**  ▼ New

Add to Goal Library

25. Repeat these steps for all additional employee objectives.
26. Each objective is accompanied by a **Progress** slider bar, which the employee may use to update their percentage complete for that objective. Reports may also be run on this information. (The slider bar appears on the employee’s **My Dashboard** in the Objectives section.)

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OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section + Add Items

Items	Description	Progress	Actions
1901 CSC Follow the ...	Follow the approved standardized office s...	0% 	×
Receive Customer Ra...	This objective is measured by the annual s...	20% 	× 

*Note: A callout bubble points to the progress bar in the second row, stating "The progress slider bar".*

27. To **Edit** an **Objective** click on the **pencil** icon. NOTE: Only objectives added as “New Objectives” can be edited (Objectives added from the Library are not editable).

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Items	Description	Progress	Actions
1901 CSC Follow the ...	Follow the approved standardized office s...	0% 	×
Receive Customer Ra...	This objective is measured by the annual s...	20% 	× 

*Note: A callout bubble points to the pencil icon in the second row, stating "To edit an objective click on the pencil icon".*

28. **Update/Edit** the applicable fields and then click on **Save**.

**Edit Item** Cancel Save

Title

Description

Category  ▼

*Note: A callout bubble points to the description field, stating "Update/Edit the fields and click on Save".*

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29. Objectives can be updated, added, and deleted. To delete an objective, click on the “X” icon in the **Actions** column. The system will prompt you to confirm the deletion of the objective. To add an objective, repeats steps 19-24 in this module.

OBJECTIVE SECTION | STANDARD 3 POINT SCALE + Add Items

### Objective Section

	Items	Description	Progress	Actions
	1901 CSC Follow the ...	Follow the approved standardized office s...	0% <div style="width: 0%;"></div>	X
	Receive Customer Ra...	This objective is measured by the annual s...	20% <div style="width: 20%;"></div>	X

Remove

Click on the "X" to delete Objectives

30. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable Classification Plan) Group. All ECP Group competencies associated with the job classification will default into the plan.

31. **NOTE:** Employees can add/delete competencies until the performance (evaluation) plan is started/ready for review (published). In working with your direct report(s), you may solicit their assistance in the addition or deletion of competencies. Employees will follow Module #4 for updating their performance (evaluation) plan.

32. After review and discussion with the employee, the competencies that will not be evaluated (rated) in this review (evaluation) period should be deleted by selecting the trash can in the **Actions** column. The system will prompt you to confirm the deletion of the competency.

COMPETENCY SECTION | STANDARD 3 POINT SCALE + Add Items

### Competency Section

	Items	Description	Actions
	Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...	X
	Building Strategic W...	Identifying opportunities and taking action to build strategic relatio...	X
	Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...	X

Click on the "X" icon to delete the Competency

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33. Two options exist to add competencies back to the performance (evaluation) plan.

- Click on **Add Items** and select **From Library**.
- Click on **Add Items** and select **From Class Specification** (see step #42).

COMPETENCY SECTION | STANDARD 3 POINT SCALE

### Competency Section

Items	Description
Building Strategic W...	Identifying opportunities and taking action to build strategic
Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...

Click on Add Items

Select From Competency Library

- From Competency Library
- From Position
- From Class Specification
- From Development Plan

34. The Library will list all competencies for all Groups.

**Add Items** Cancel Save

### Competency library

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Action Orientation (Judicial Prof)	Initiating action with a drive to achieve an...	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Admin)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Leader)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Adaptability (Judicial Prof)	Maintaining effectiveness when experienci...	
<input type="checkbox"/>	Aligning Performance For Success (310)	Focusing and guiding others in accomplish...	

1 - 10 of 138 items

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35. If you do not know your Group, you can find the information in the Compensation Manual. The Compensation Manual is available on the Civil Service Commission (intranet) Insider under Top 10 Links or on the Civil Service Commission home page (internet) under MCSC Quick Links.

36. Click on Section A in the Compensation Manual.

The screenshot shows the Michigan Civil Service Commission website. The main content area is titled "Compensation Plan 10/01/2012 (PDF Version)". A callout bubble with the text "Click on Section A" points to the first item in the list: "Section A - Alphabetic List of Classes 10/01/2012 PDF". Other items in the list include Section B (Numeric List of Pay Ranges), Section C (Pay Schedules for Classifications in Performance Pay Programs), and Teacher Pay Schedules. The left sidebar contains various navigation links like "Regulations", "State Personnel", "Advisory Bulletins", "Compensation Plan", "Grievances, Complaints & Appeals", "DSTARS Decision Database", "Other Regulatory Information", "Civil Service Commission", "Employment", "Career Services", "Inside Civil Service", "Employee Benefits", "Disability Management", and "State Board of Ethics". The bottom left has a "State Jobs" button with "View Current Openings". The right sidebar lists "MCSC Quick Links" such as "MCSC Phone Book", "Job Specifications/Pay", "Compensation Plan 2012-2013", "MCSC Rules and Regulations Updates", "State of MI Workforce Reports", "MCSC Forms", "Military Leave", "Retiree Information", "Michigan Education Savings Program", "Michigan Education Trust", and "ADA Complaint Process & Form". Social media icons for Twitter, YouTube, and Facebook are also present, along with the "PURE MICHIGAN" logo.

37. Locate your HRMN Position Description (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager/manager/supervisors and a Group 3 Manager/supervisors); CL4 is Group 4.

COMPENSATION PLAN -- SECTION A

HRMN Position Description	Grade	Core Pos Code	Schedule	Unit	Exempt	Salary Class	Pay Plan	Shift	Job Cat	Job Class	10/1/12 Minimum	10/1/12 Maximum
Dept Of State Branch Supv-4	12	DSBRSPV4	NERE-180	Y 51	Y	H	BWE1	Y	05	CL3	\$21.41	\$31.30
Dept Of State Branch Supv-5	13	DSBRSPV5	NERE-182	Y 51	Y	H	BWE1	Y	05	CL3	\$22.88	\$34.14
Departmental Analyst Trainee-E	9	DEPTTRE	NERE-002P	Y 23	N	H	BWN2	Y	02	CL2	\$19.42	\$31.30
Departmental Analyst Trainee-E	9	DEPTTRE	NERE-002P	Y 99	N	H	BWN2	Y	02	CL2	\$19.42	\$31.30
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y 99	N	H	BWN2	Y	02	CL2	\$18.50	\$23.21
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y 23	N	H	BWN2	Y	02	CL2	\$18.50	\$23.21
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y 23	N	H	BWN2	Y	02	CL2	\$17.80	\$24.51
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y 99	N	H	BWN2	Y	02	CL2	\$17.80	\$24.51
Departmental Analyst-E	P11	DEPTALTE	NERE-174	Y 99	Y	H	BWE1	Y	02	CL2	\$19.87	\$28.97
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y 23	Y	H	BWE1	Y	02	CL2	\$19.87	\$28.97
Departmental Analyst-E	9	DEPTALTA	NERE-180	Y 99	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Analyst-E	9	DEPTALTA	NERE-180	Y 23	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Analyst-A	12	DEPTALTA	NERE-180	Y 51	Y	H	BWE1	Y	02	CL2	\$21.41	\$31.30
Departmental Manager-1	12	DEPTMGR1	NERE-180	Y 51	Y	H	BWE1	Y	02	CL3	\$21.41	\$31.30
Departmental Manager-2	13	DEPTMGR2	NERE-182	Y 51	Y	H	BWE1	Y	02	CL3	\$22.88	\$34.14
Departmental Manager-3	14	DEPTMGR3	NERE-186	Y 51	Y	H	BWE1	Y	02	CL3	\$25.25	\$37.62
Departmental Manager-4	15	DEPTMGR4	NERE-188	Y 51	Y	H	BWE1	Y	02	CL3	\$28.28	\$41.84
Departmental Manager-5	16	DEPTMGR5	NERE-189	Y 51	Y	H	BWE1	Y	02	CL3	\$31.80	\$46.97

Callout bubbles: "Locate your HRMN Position Description (Job Classification)" points to the "HRMN Position Description" column. "Review information in Job Class column" points to the "Job Class" column.

38. Select the appropriate competency by clicking in the checkbox in front of it and clicking on **Assign**.

**Add Items** Cancel Save

**Competency library** Click on Save

1 records are selected. Clear selection Select all 138 records

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Action Ori... (Prof)	Initiating action with a drive to achieve an...	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experienc...	
<input checked="" type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Admin)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Leader)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Prof)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Aligning Performance For Success (310)	Focusing and guiding others in accomplis...	

Navigation: << < 1 2 3 4 5 6 7 8 9 10 ... > >>

39. The competency is added back to the performance (evaluation) plan.

40. The other option for adding a competency back to a performance (evaluation) plan is to click on **Add Items** and select **From Class Specification**.

COMPETENCY SECTION | STANDARD 3 POINT SCALE

**Competency Section** + Add Items

Items	Description
Building Strategic W...	Identifying opportunities and taking action to build strategic
Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...
Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...

**Click on Add Items**

- From Competency Library
- From Position
- From Class Specification**
- From Development Plan

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- 41. Selecting **From Class Specification** will add all competencies associated with the Group back onto the performance (evaluation) plan. (Deleting competencies is covered in step #32 above.)
- 42. **Plan Acknowledgements** are defaulted via the performance (evaluation) plan template. The acknowledgement is used to have an employee and/or manager certify that they have seen and reviewed the objectives and competencies assigned in the performance (evaluation) plan that will be used for the current rating period.

How to acknowledge a performance (evaluation) plan is covered in module 12

The screenshot displays the NEOGOV PE system interface for an employee named MCSC EMPLOYEE, PE-HUMAN RESOURCES ANALYST. The interface is divided into several sections:

- Navigation:** Employees, Library, Trainings, Reports.
- Performance Objectives:**
  - 1901 CSC Follow the ... Follow the approved standardized office s... 0%
  - Receive Customer Ra... This objective is measured by the annual s... 20%
- Competency Section | STANDARD 3 POINT SCALE**

Items	Description
Building Strategic W...	Identifying opportunities and taking action to build strategic
Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...
Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...
- Notes & Attachments**
- Process**
  - Before Ratings**

Signature	Due	Status	Step is required
MCSC EMPLOYEE	Thu, Dec 10, 2015	Pending 12/03/2015	Yes

- 43. **Self/Peer Ratings** can be used to assign a self/peer rating to the performance (evaluation) plan. Direct reports could be added as additional raters (peer reviews), or if reviews from other employees (e.g., project manager/manager/supervisors) are desired, they could be assigned as well. Please contact your HR Office to have self/peer ratings assigned to the plan.
- 44. The **Rating of Record** is assigned on the performance (evaluation) plan template. Employees *may* be required to conduct a self-rating before the performance (evaluation) plan due date.

The manager/supervisor is required to rate the employee before the performance (evaluation) plan due date. The manager/supervisor rating due date is 12/31/2015. The manager/supervisor serves as the **Rater of Record**.

Module #3

The screenshot shows the 'Process' section for an employee named MCSC EMPLOYEE (PE-HUMAN RESOURCES ANALYST). The process is divided into three main stages: 'Before Ratings', 'Ratings', and 'After Ratings'.  
 - **Before Ratings:** Step 1 is 'Signature' for MCSC EMPLOYEE, due on Thu, Dec 10, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes).  
 - **Ratings:** Step 2 is 'Rating' for MCSC MANAGER, due on Thu, Dec 31, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes) and has a weight of 100%. A callout bubble points to this step with the text: 'Performance (evaluation) plan and Rating Due Date'.  
 - **After Ratings:** Step 3 is 'Signature' for MCSC EMPLOYEE, due on Thu, Dec 31, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes).  
 - Between the 'Ratings' and 'After Ratings' stages, there is a 'Release to Employee' step.

45. The **Rating Acknowledgements** are defaulted via the performance (evaluation) plan template. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance (evaluation) plan rating for the current rating period.

How to acknowledge a performance rating is covered in module 13.

This screenshot shows the 'Process' section for the same employee, MCSC EMPLOYEE (PE-HUMAN RESOURCES ANALYST). The process is divided into three main stages: 'Before Ratings', 'Ratings', and 'After Ratings'.  
 - **Before Ratings:** Step 1 is 'Signature' for MCSC EMPLOYEE, due on Thu, Dec 10, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes).  
 - **Ratings:** Step 2 is 'Rating' for MCSC MANAGER, due on Thu, Dec 31, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes) and has a weight of 100%.  
 - **After Ratings:** Step 3 is 'Signature' for MCSC EMPLOYEE, due on Thu, Dec 31, 2015, with a status of 'Pending' and a due date of 12/03/2015. It is noted that a step is required (Yes).  
 - Between the 'Ratings' and 'After Ratings' stages, there is a 'Release to Employee' step. A callout bubble points to this step with the text: 'Employee Acknowledgement of Rating shown in the Process Timeline'.  
 - Below the 'After Ratings' stage, there is an 'Evaluation Due Date' step set for Thu, Dec 31, 2015.

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- 46. **The Process Timeline Tasks** for the employee’s plan acknowledgement, rating acknowledgement, self-rating (if applicable) and the manager/supervisor review will be defaulted into the plan from the performance (evaluation) plan template. These tasks will appear on the associated employee’s (and manager/supervisor’s) **My Dashboard**. Reminder and overdue notices are sent based on template configuration.
- 47. New tasks can be added to the performance (evaluation) plan by clicking on the **Add Task** button.

The screenshot displays the NEOGOV PE interface for an employee. On the left, a sidebar shows the user profile for 'MCSC EMPLOYEE PE-HUMAN RESOURCES ANALYST' with navigation options for Employee, Reports, Org Chart, and Manager. The main content area shows a 'Competency Section' with a table of items:

Items	Description
Building Strategic W...	Identifying opportunities and taking action to build strategic
Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...
Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...

Below the table is a 'Notes & Attachments' section and a 'Process' section. A callout box points to the '+ Add Task' button in the Process section, with the text 'Click on AddTask'.

- 48. Enter a name in **Assignee**.
- 49. Enter a title in **Title**.
- 50. Enter a **Description** if necessary.
- 51. Select a **Due Date** from the calendar.
- 52. **Reminder Settings** can be set prior to the task due date or after.
- 53. Click on **Save** or **Cancel**.

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**Add Task**
Cancel Save

48

Assignee Search employee

49

Title

50

Description

51

Due Date Thu, December 03, 2015

Click on Email Notifications to set reminder and overdue notices

Email Notifications

**Add Task**
Cancel Save

53

**Reminder Settings**

Reminder  Off  On

Overdue  Off  On

Notices

30 Days Before

2 Weeks Before

1 Week Before

Custom  Days Before

Notices

Every Week

Every 2 Days

Every Day

Custom Every  Days

Back

Note: **Tasks** added to an employee’s performance (evaluation) plan are visible to the manager in the Process section, and they will show up on the employee’s **My Dashboard**

54. **Notes & Attachments** can be added to the performance plan using the **Add Notes & Attachments** button.

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The screenshot shows the NEOGOV PE interface. On the left is a sidebar with a profile card for 'MCSC EMPLOYEE PE-HUMAN RESOURCES ANALYST' and navigation links for 'Employee', 'Reports', 'Org Chart', and 'Manager'. The main content area displays a 'Competency Section | STANDARD 3 POINT SCALE' with a table of items. A callout bubble points to the '+ Add Notes & Attachments' button in the 'Notes & Attachments' section.

Items	Description	Progress	Actions
1901 CSC Follow the ...	Follow the approved standardized office ...	0%	✕
Receive Customer Ra...	This objective is measured by the annual ...	20%	✕ ✎

Items	Description	Actions
Building Strategic W...	Identifying opportunities and taking action to build strategic relatio...	✕
Building Trust (200)	Interacting with others in a way that gives them confidence in one's...	✕
Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...	✕

55. Notes can be typed directly. Some formatting including spell checker is available. Attachments can be added by using the **Attachment** button. If **Private Note** is checked, only the manager/supervisor can see the note.

The 'Add Note/Attachment' form includes a 'Cancel' and 'Save' button at the top right. Below is a 'Note' section with a rich text editor containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, and Spell Check (ABC). Below the editor is an 'Attachment' section with a '+ Attachment' button and a selection area currently showing 'Nothing selected'. At the bottom, there is a checkbox for 'Private Note' and a note: '\* limit one attachment per note.'

56. **Audit trail** will document when changes are made **Objectives, Competencies**, any fields within **Edit Employee Evaluation** (Evaluation type, Due Date, Evaluation Name, Numeric Scoring, Overall Rating, and Overall Rating Scale) and each time the performance (evaluation) plan is paused/reverted to draft status/started (made ready for review/Published).

Audit trail

Field Name	New Value	Old Value	Updated By	Updated On
Competency	Adaptability (200)		MCSC MANAGER	12/03/2015 16:21:30
Building Trust (200) - ...	33.33	0.00	MCSC MANAGER	12/03/2015 16:21:30
Building Strategic Wo...	33.34	0.00	MCSC MANAGER	12/03/2015 16:21:30
Receive Customer Rat...	20		CHRISTINE SPITZLEY	12/03/2015 16:01:18
Goal	Receive Customer Rat...		CHRISTINE SPITZLEY	12/03/2015 16:01:10
1901 CSC Follow the A...	50	100.00	CHRISTINE SPITZLEY	12/03/2015 16:01:10
Is Published	False	True	MCSC MANAGER	12/03/2015 15:22:27
Is Published	True	False	CHRISTINE SPITZLEY	12/03/2015 13:49:13
Goal	1901 CSC Follow the A...		CHRISTINE SPITZLEY	12/03/2015 13:47:58

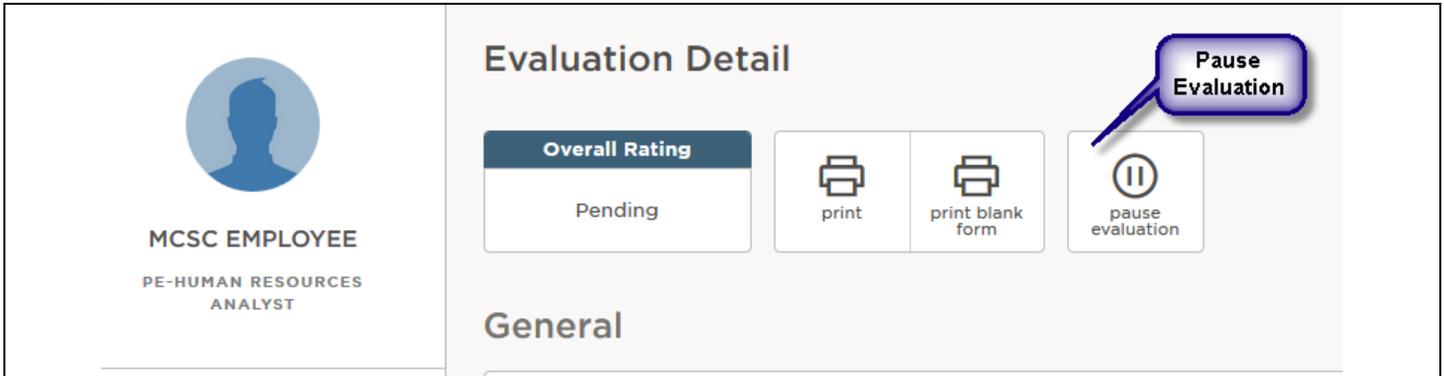
<< < 1 > >> Items per page 10 1 - 9 of 9 items

57. When the performance (evaluation) plan is complete, it can be made ready for review by clicking on the play button, **Start Evaluation**. Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status).

58. After the performance (evaluation) plan is started/ready for review (published), an email is sent to the employee regarding the **Acknowledgement of Plan**.

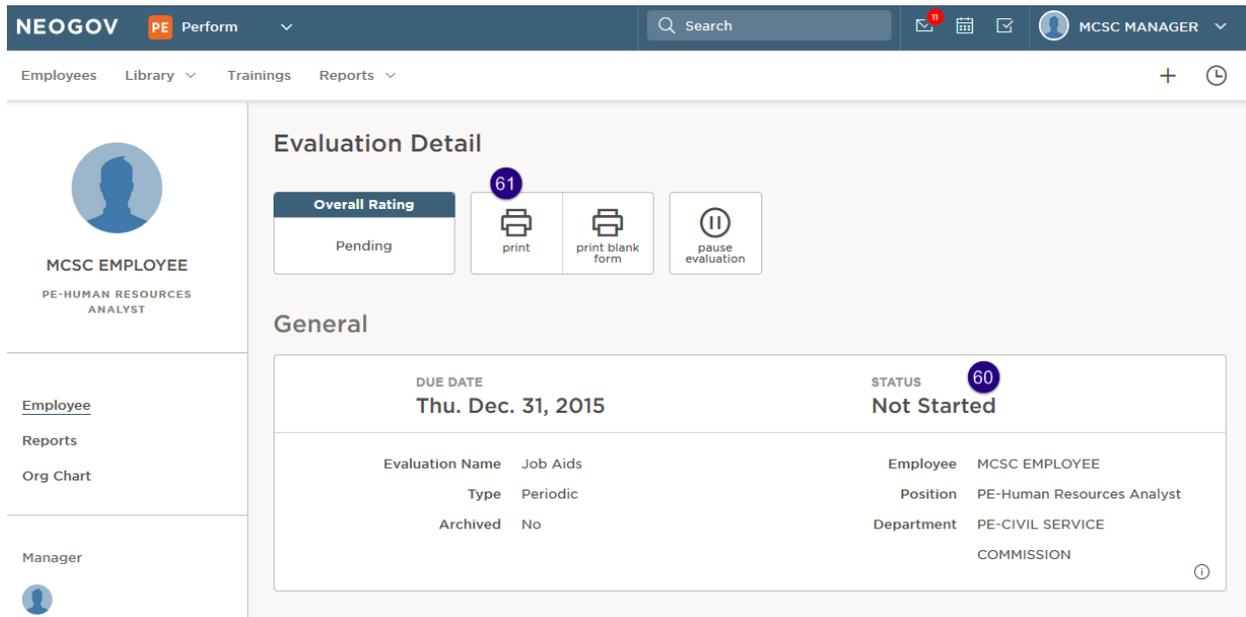
59. The performance (evaluation) plan can be paused/reverted to draft status (unpublished) if changes need to be made to any part of it via **the pause button**. If changes are made to Objectives/Competencies the Acknowledgement of Plan email for the employee will be sent again once the evaluation is started/ready for review (published).

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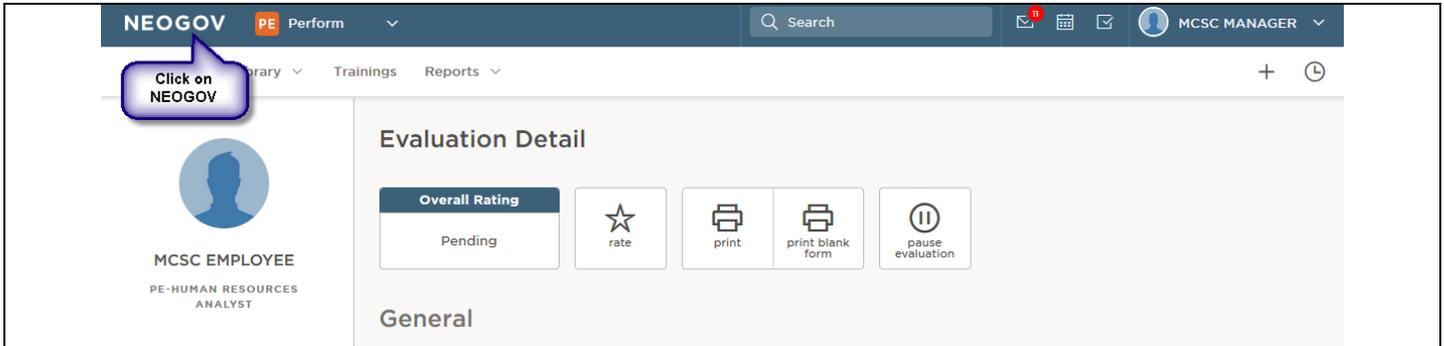
60. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.

61. The performance (evaluation) plan can now be printed using the **Print** feature.

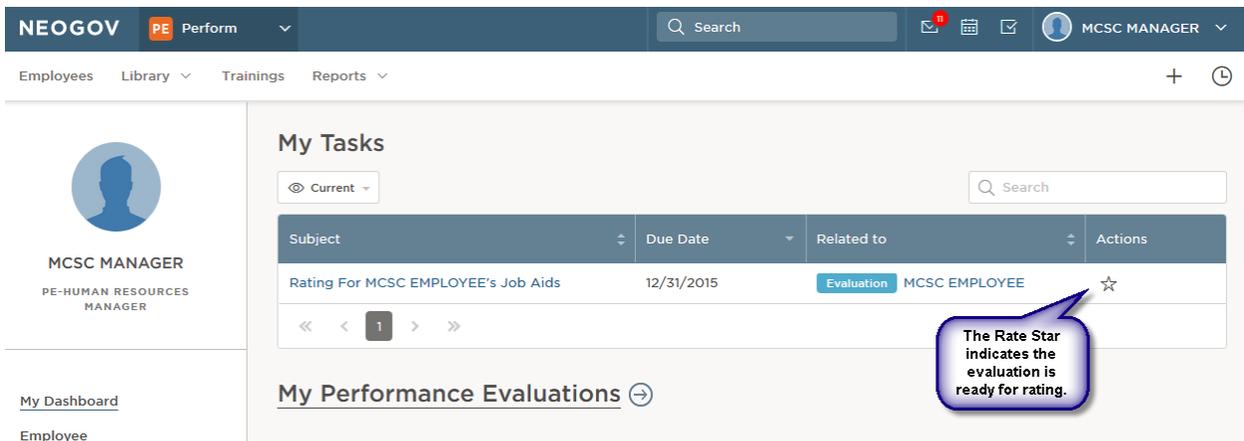


62. Click on **NEOGOV** to go back to your dashboard.

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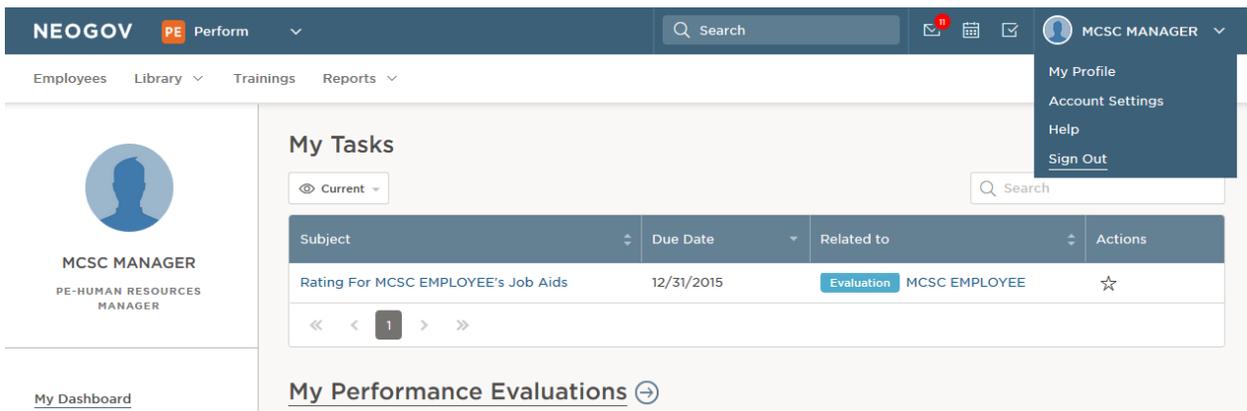


63. Notice that there is now a rate star in the Actions column for the employee's performance evaluation (plan).



64. Repeat these steps above for all direct reports.

65. To exit NEOGOV PE, click on **Sign Out**.



**Additional Resources:**

NEOGOV PE Tutorial

Help & Training available in PE in the drop-down under your name (top right corner)

## Module #3

PE Glossary

For questions on the new system or this job aid, email [MCSC-NEOGOV@michigan.gov](mailto:MCSC-NEOGOV@michigan.gov)

For questions on performance management plans, contact your HR Office