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| Module #6 | Creating Tasks, Notes and Attachments |
| Objective: | This How To provides an employee overview of the My Tasks and My Notes & Attachments sections. |

Pre-Module Requirements:

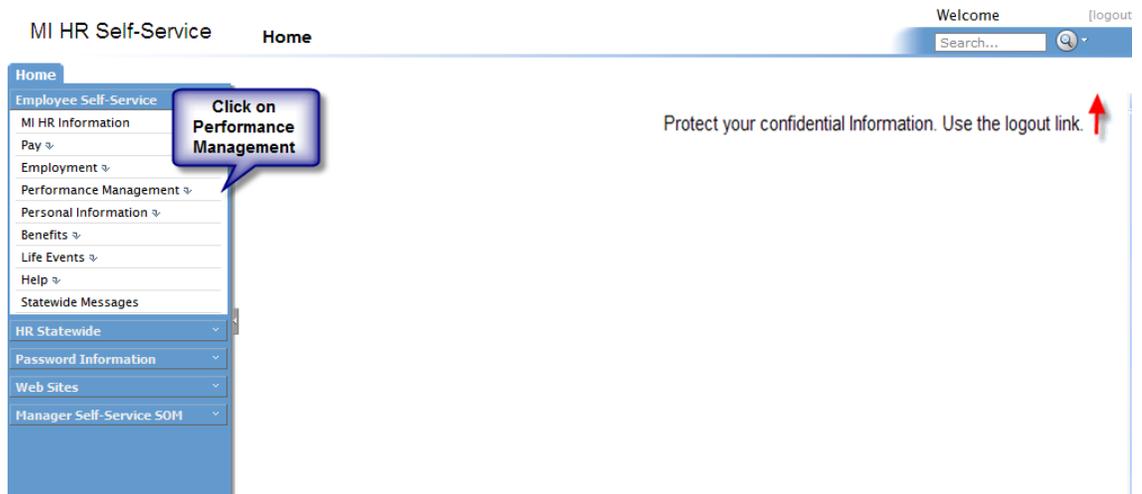
- Employee has received access to the system.

Glossary:

- Performance plans can also be called Evaluation Plans.
- Objectives in the current performance management system are Goals in PE.

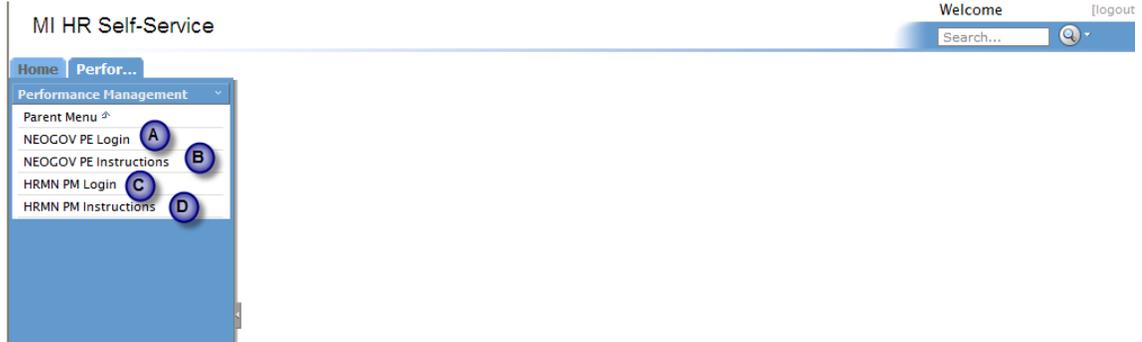
Steps:

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



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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.

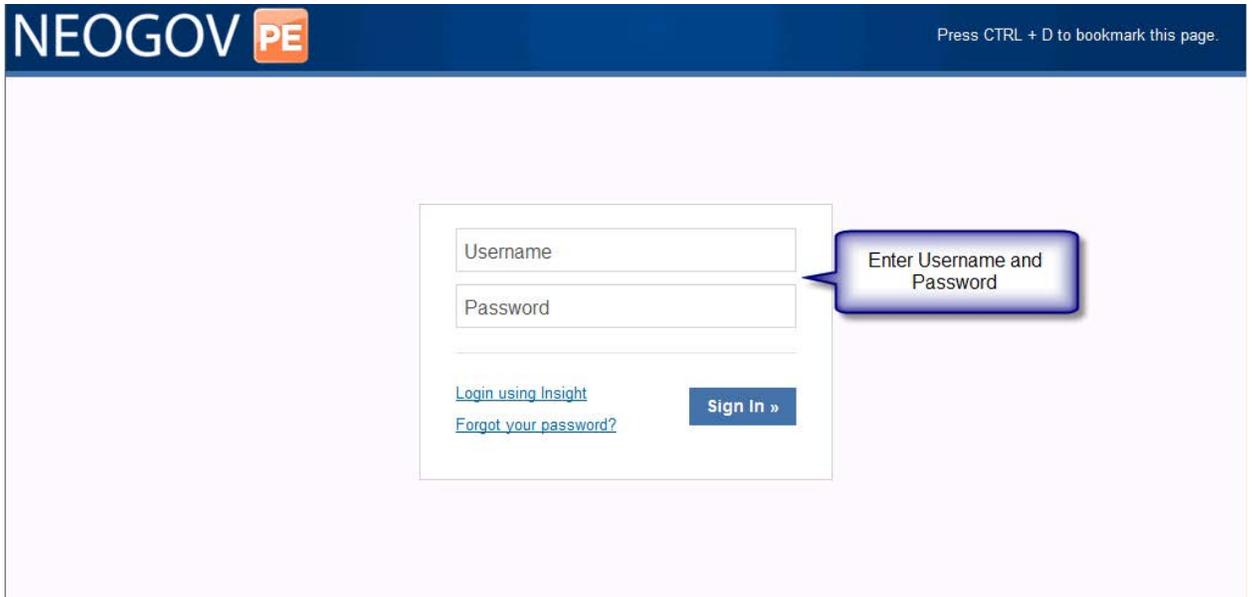


3. You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**.

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

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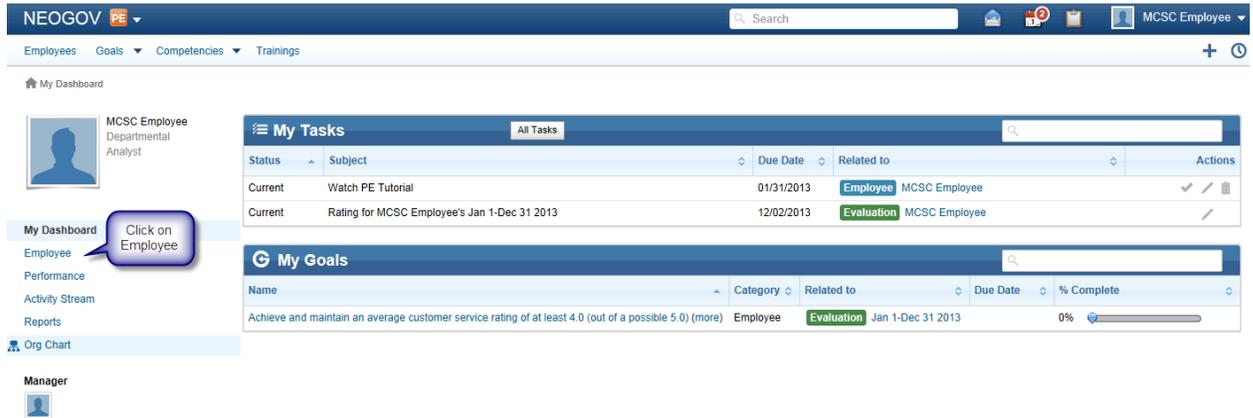
4. Log into the NEOGOV PE site using your **Username** and **Password**. Click on the **Sign In >>** button.



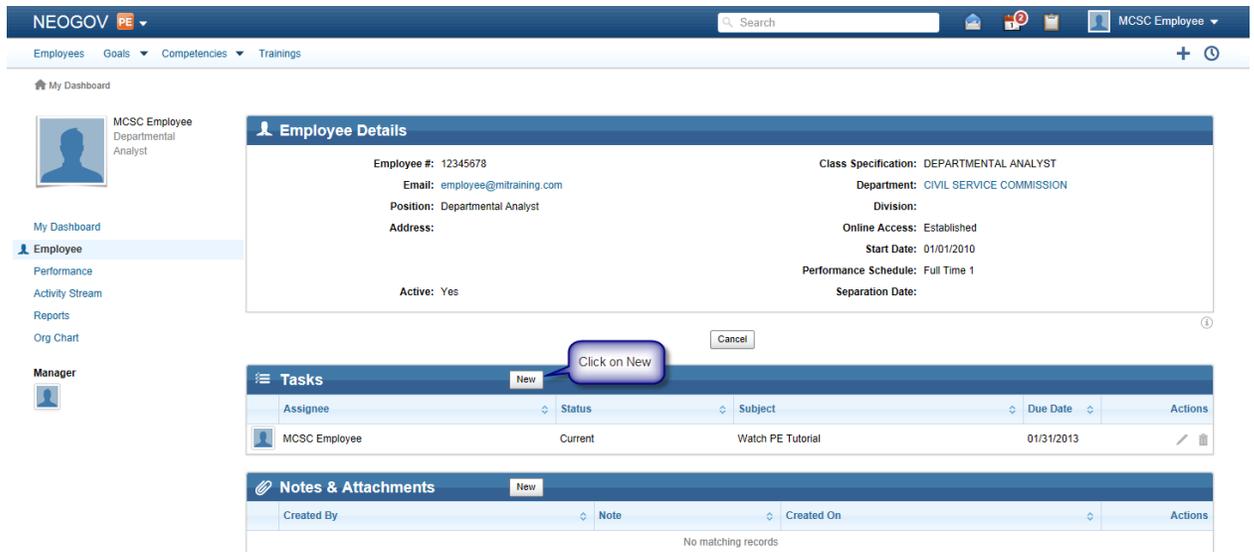
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5. Upon login, the first page you will see is your **My Dashboard** screen. The employee dashboard serves as your personal homepage. It contains a section for assigned tasks and a section to track your own goals (objectives) from performance (evaluation)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

6. To add a **Task**, on the **My Dashboard** screen click on **Employee**.

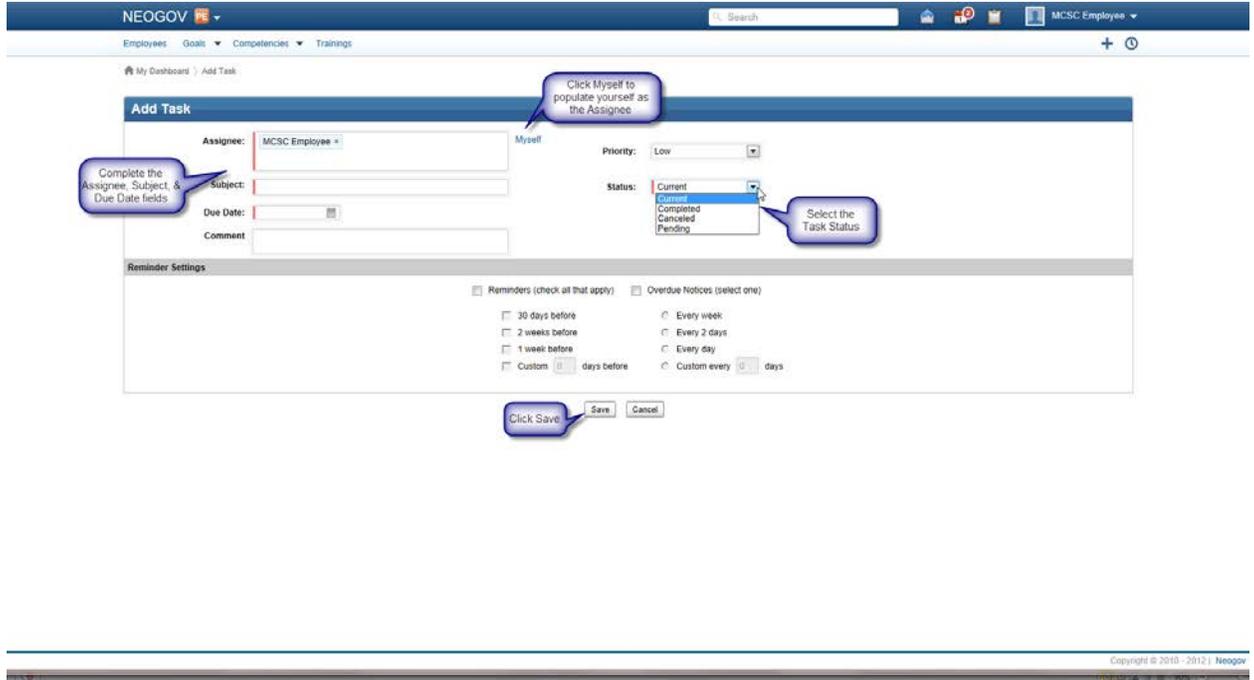


7. On the **Employee Detail** screen click on **New** in the **Tasks** section.

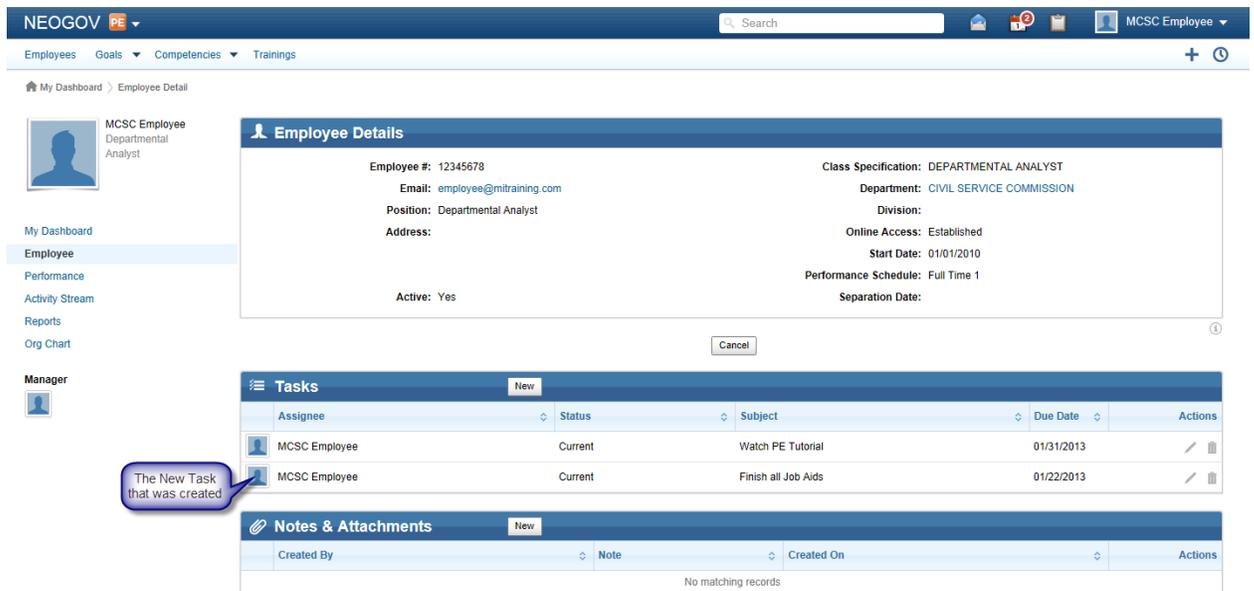


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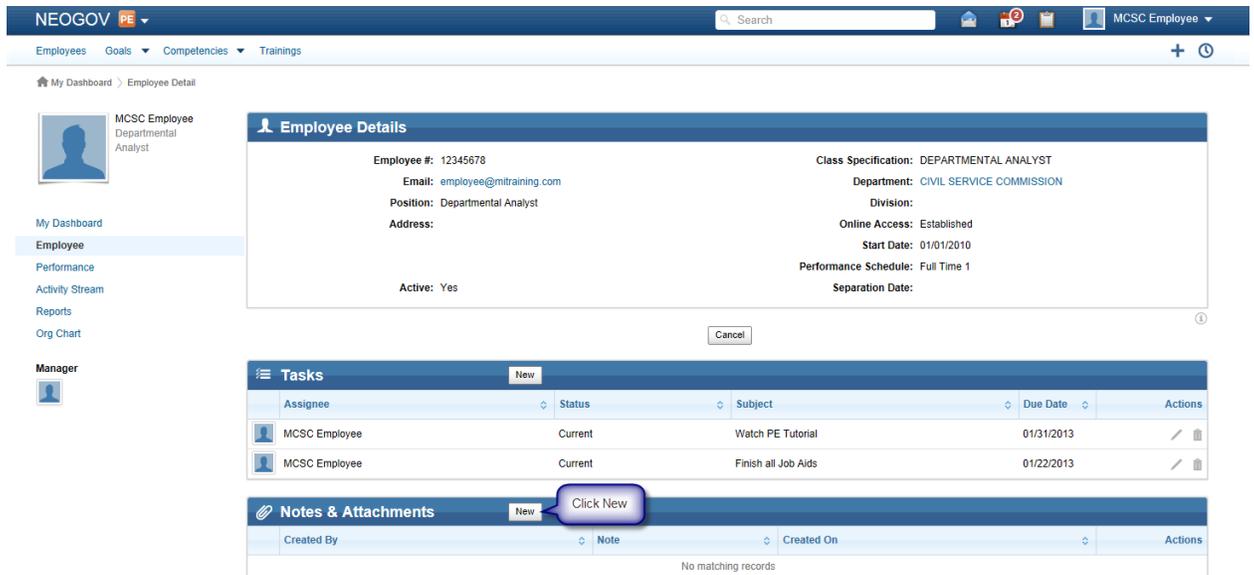
- Complete the required **Assignee**, **Subject**, **Due Date**, and **Status** fields. The ability to set reminders and overdue notices is also available on this screen. When you are finished, click on **Save**.



- After you click “Save” you are returned to the **Employee Detail** screen. You can now view the new task you entered.

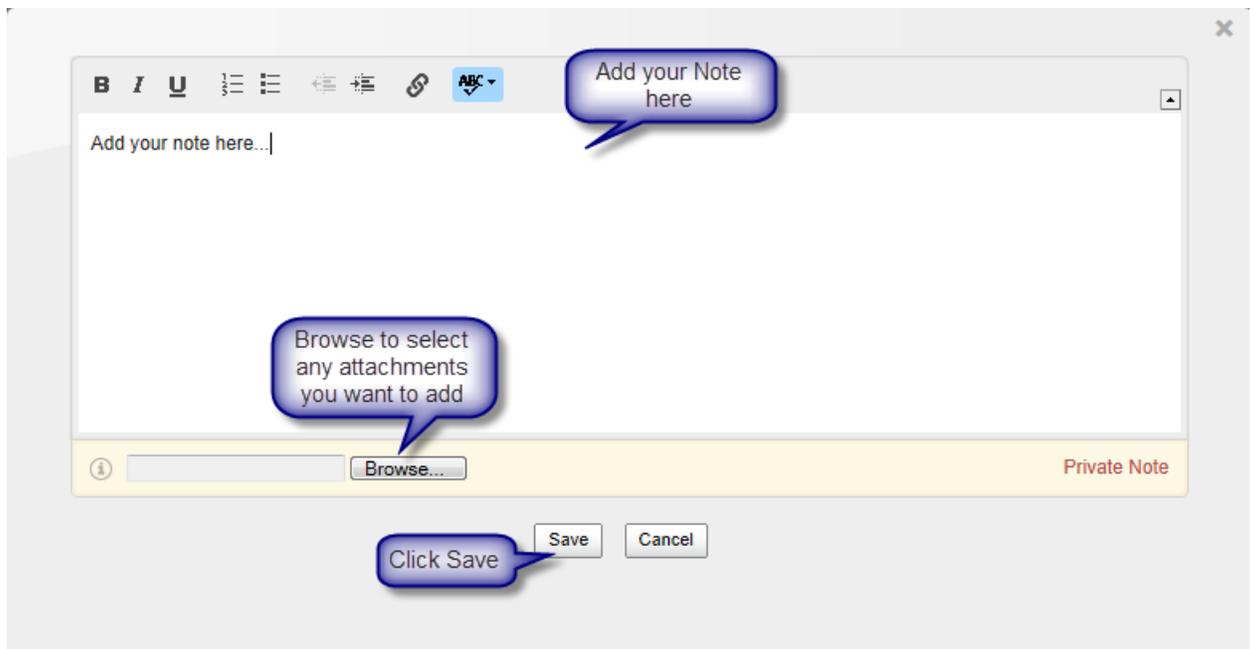


10. To add a **Note or Attachment**, on the **Employee Detail** screen click **New** in the **Notes & Attachments** section.



11. Complete the free text section to add any notes. Click on **Browse** to select any documents to attach to your employee record in PE. When you are finished, click on **Save**. (Tasks attached to employee performance plans are created by managers or HR Office staff.)

12. If Private Note is selected, the note is only viewable by the employee.



13. You are returned to the **Employee Detail** screen. You can now view the new note/attachment that was added.

The screenshot shows the 'Employee Detail' screen for an 'MCSC Employee' (Departmental Analyst). The 'Notes & Attachments' section contains one entry:

| Created By | Note | Created On | Actions |
|---------------|-----------------------|------------|----------------|
| MCSC Employee | Add your note here... | 01/18/2013 | [Edit] [Trash] |

A callout bubble points to the new note with the text: "The Note that was added".

14. On The **Employee Detail** screen, you can click the **Pencil** icon to **edit** a Task or Note/Attachment. You can click on the **Trash Can** icon to **delete** a Task or Note/Attachment.

The screenshot shows the 'Employee Detail' screen with callouts for editing and deleting tasks and notes:

- A callout bubble points to the pencil icon in the 'Tasks' table: "Click the Pencil icon to edit Tasks or Notes".
- A callout bubble points to the trash can icon in the 'Notes & Attachments' table: "Click on the Trash Can icon to delete a Task or Note".

The 'Tasks' table contains two entries:

| Assignee | Status | Subject | Due Date | Actions |
|---------------|---------|---------------------|------------|----------------|
| MCSC Employee | Current | Watch PE Tutorial | 01/31/2013 | [Edit] [Trash] |
| MCSC Employee | Current | Finish all Job Aids | 01/22/2013 | [Edit] [Trash] |

The 'Notes & Attachments' table contains one entry:

| Created By | Note | Created On | Actions |
|---------------|-----------------------|------------|----------------|
| MCSC Employee | Add your note here... | 01/18/2013 | [Edit] [Trash] |

Additional Resources:

NEOGOV PE Tutorial

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

PE Glossary

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