NEOGOV PE

How To

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.

Steps:

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

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

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

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

   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.

   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. 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.

8. 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**.

9. 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 Manager/Manager/Supervisors 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.

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.

15. 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
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