

**NEOGOV PE**  
**SETTING UP AND MODIFYING AN EMPLOYEE PERFORMANCE PLAN**  
**Quick Reference Guide**

*NOTE: It is recommended that you view the video and review the detailed instructions located in Performance Management in MI HR Self Service (NEOGOV PE Instructions) 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
  - b) click on the “Sign In” button
- 4) Hover over the “Direct Reports” icons at the lower left side of the screen, and click on the icon for the employee whose plan you are setting up.
- 5) Click on the “Performance” link on the left.
- 6) Under the “Performance Evaluations” section, click on the Evaluation Name (dates) of the plan you are setting up.
- 7) Under the “Objectives” section, Click on the “Add items” button on the right side of your screen to add specific objectives for the employee. (**NOTE:** Some objectives may be pre-loaded to the plan. If so, do not delete any of the pre-loaded objectives.)
  - a) Select “From Library” to select objectives that have been added to the library for your agency. You will have been notified separately by your department if objectives have been pre-loaded to the library.
  - b) Click on the “Assign” button at the bottom of the screen.
  - c) If not notified by your agency about pre-loaded objectives, select “New Objective”
  - d) Type the objective in the “Objective Name” 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 “Objective Name” field.)
  - e) Select the Objective Category (If it is an overall Division objective, use “Division”; otherwise select “Employee”)
  - f) Enter any additional appropriate information about the objective in the “Description” field. (Note: The information in the description field will not be included on the form if you print the plan.)

**NEOGOV PE**  
**SETTING UP AND MODIFYING AN EMPLOYEE PERFORMANCE PLAN**  
**Quick Reference Guide**

- g) Before clicking on the “Save” button, be sure that the objective reads correctly as you cannot edit a saved objective; if you need to make a change, you must delete and reenter it. (**OPTION:** Two options to avoid having to retype objectives if you decide after you save it that you want to modify it: 1) enter the objectives in a WORD document and then cut and paste them to PE or 2) if you need to change a saved objective, copy it before deleting it, then paste it to the new objective screen and make whatever edits are necessary before saving it.)
- 8) Repeat items 7c through 7g for each additional objective you wish to add.
- 9) All available competencies for the ECP group that the employee’s position is in will be listed in the “Competencies” section. Select the “delete” icon on the right under “Actions” to delete unused competencies.
- 10)The employee and manager will default in as a rater of the performance plan in the “Raters” section. If the employee will not be required to do a self-evaluation, click the trash can (delete) button on the right to remove them as a rater.
- 11)To assign specific tasks click on the “New” button in the “Tasks” section and complete the information on the “Add Task” screen. (Optional)
- 12)To add notes or attachments to the plan, click on the “New” button in the “Notes & Attachments” section. (Optional)
- 13)When plan is complete, click the “Click here to Publish” button located just before the “Objectives” section on the screen. (Note: If you need to make changes to the plan later, see the [To Modify a Previously Published and Certified Plan](#) section below)
- 14)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 published by clicking on the “Print” button in the “Performance Evaluation Detail” section of your screen. The employee or manager may also print a slightly different layout of the plan before or after publishing it by clicking on the “Print a Blank Rating Form” link located just above the “Objectives” section; remember that only that portion of the objectives that are listed in the objective “name” will show on either of these printed versions.
- 15)The employee must “certify” the plan:
- a) Sign in to their MI HR Self-Service account.

**NEOGOV PE**  
**SETTING UP AND MODIFYING AN EMPLOYEE PERFORMANCE PLAN**  
**Quick Reference Guide**

- b) Click on "Performance Management"
- c) Click on "NEOGOV PE Login"
- d) Enter their NEOGOV user ID & password.
- e) In the "My Tasks" section, on the line that says "Certification of Plan", click on the edit button (/) under the "Actions" column.
- f) Click on the "Status" drop down and select "Completed"
- g) Click "Save" at the bottom of the screen.

16) To set up a plan for the next subordinate, click on "My Dashboard" located in the upper left corner of the screen and repeat items #4 through 15.

17) 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 Certified Plan:**

- 1) Click on the "Click Here to Unpublish" link located just above the "Objectives" section.
- 2) Make all required modifications to the plan.
- 3) In the "Tasks" section, click on the "New" button.
- 4) Begin typing the last name of the employee whose plan you have modified; click on the employee name when it appears to add it to the box.
- 5) In the "Subject" box type "Certification of Modified Plan"
- 6) Select the Due Date for the employee certification in the "Due Date" box.
- 7) Enter appropriate comments (optional).
- 8) Check desired boxes for reminders and notifications
- 9) Click on the "Save" button.
- 10) Click on the "Click here to Publish" link located just above the "Objectives" section.
- 11) Notify employee that they must recertify the modified plan.

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**Quick Reference Guide**

Note: You can return to your main/home screen at any time by clicking on the “My Dashboard” link.

Link to detailed instructions (tutorial and job aids):

<http://www.michigan.gov/mdcs/0,4614,7-147-7213-293190--,00.html>