

NEOGOVE PE – TRAINING GUIDE

Objective:

This Training Guide focuses on navigating NEOGOV Perform (PE) and how to complete the routine employee and manager tasks that may arise during a performance evaluation (plan) year.

Pre-Requisite Requirements:

- The Agency is actively using NEOGOV Perform for performance management.
- Users have been activated in the system.
- Evaluations (Plans) have been assigned.

Helpful Tips:

- Performance plans can also be called evaluation plans.
- Clicking on the NEOGOV icon in the upper left-hand corner always returns a user to their dashboard.

INDEX: Selecting a hyperlink below will take you to the section of interest.

1. [Login](#)
2. Overview of NEOGOV Perform
 - a. [Dashboard](#)
 - b. [Journal Entries](#)
 - c. [Employee Details](#)
 - i. Reports
 - ii. Organization Chart
 - d. [Menu Bar](#) (Employees, Performance Evaluations, Library, Trainings, Reports)
 - e. [Other Items](#) (Search bar, email, calendar, profile menu)
3. [Performance Evaluation \(Plan\) Overview](#)
4. [Edit/Start Performance Evaluation \(Plan\)](#)
 - a. [Add/Delete Objectives](#)
 - b. [Assignment of Bulk Objectives](#)
 - c. [Add/Delete Competencies](#)
 - d. [Notes/Attachments/Tasks](#) Within the Evaluation
 - e. [Start Evaluation](#)
5. [Acknowledgement of Evaluation \(Plan\)](#) (Employee)
6. [Ratings](#)
7. [Acknowledgement of Rating](#) (Employee)
8. [Reports](#)

LOGIN

You can access NEOGOV Perform using the following link: <https://login.neogov.com/signin?siteCode=PE>

You should have received an **Activate Your NEOGOV Perform User Account** email with a link to create your account **Password** using your email address as your **Username**. Activations are good for 24 hours and will expire. If you have not received an activation, or 24 hours has passed, please send an email to MCSC-NEOGOV@michigan.gov for assistance.

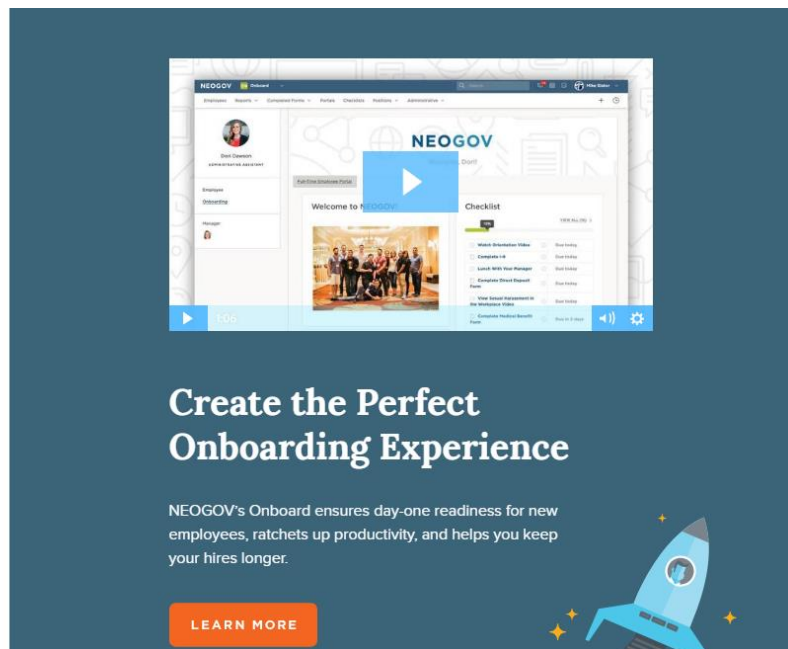
NOTE: If you are currently using NEOGOV Insight, or are a Hiring Manager using OHC, you will now be able to toggle to NEOGOV PE.

1. Log into the NEOGOV Perform website using your **Username** and **Password**. Click on the **Log In** button.

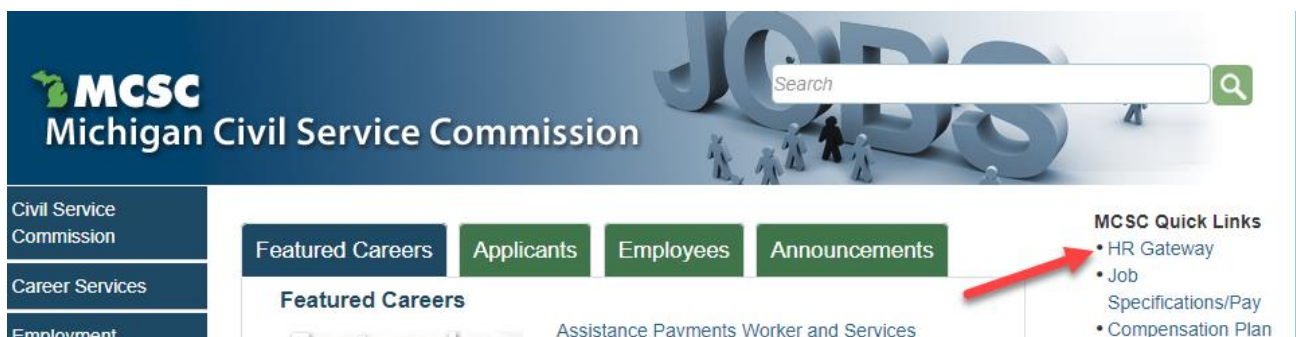
If you have forgotten your password, click on **Forgot your password?** below the sign in box. Please make sure you use your legal name when filling out the password request form.



The login form features the NEOGOV logo at the top. Below it are two input fields: 'Username' and 'Password', both highlighted with a yellow border. A blue 'Log In' button is positioned below the password field. Underneath the button are two links: 'Forgot username?' and 'Forgot your password?'.



2. NEOGOV Perform is also accessible in the HR Gateway on the Civil Service Commission website.



Dashboard

1. Upon login, you will see your **Dashboard**. The employee dashboard serves as your personal homepage in NEOGOV Perform. It contains a section for assigned tasks and icons/links to your performance evaluations.
2. The **My Tasks** section displays a complete list of your current tasks including personal tasks you have created and others that may relate to performance evaluations (plans) assigned to you. Tasks are covered in detail later in this document. The **Related To** column indicates the purpose and provides a direct link to the task.
3. Only current tasks are displayed by default. You can review completed, canceled, pending and skipped tasks by clicking the **View All** link.
4. Columns can be sorted using the **Sort** symbol within the column header.
5. The **My Evaluations** section displays the most recent evaluations (plans) assigned to you. The **View All of My Evaluations** link takes you directly to the Employee Details page where you can select and view your performance evaluation(s) (plans).
Note: If you do not have any evaluations (plans) under the My Evaluations section of your dashboard, please contact your HR Office.
6. Clicking on the title of an evaluation (plan) takes you directly to that **Evaluation Details** page.

The screenshot shows the 'Evaluation Dashboard' interface. At the top left, the title 'Evaluation Dashboard' is followed by a circled '1'. Below this is the 'My Tasks' section, which includes a 'view all >' link and a row of six summary cards: 'Total' (1), 'Rating' (1), 'Approve And Sign' (0), 'Sign' (0), 'Approve' (0), and 'Other' (0). A circled '3' is placed over the 'Rating' card. Below the cards is a 'hide table ^' link. The main table has a header with columns: 'Task', 'For Employee', 'Related To', and 'Due Date'. A circled '2' is over the 'Task' column, and a circled '4' is over the 'For Employee' column. The first row of the table contains: '★ Rating For MCSC EMPLOYEE's Job Aids', 'MCSC EMPLOYEE', 'Job Aids', and '▲ 12/31/2015'. Below the table is a '1 - 1 of 1 items' indicator. At the bottom is the 'My Evaluations' section with a 'view all of my evaluations >' link and a circled '5'. It contains three evaluation cards: 'Job Aids-3' (Due: Mon, Dec 31, 2018, Status: Draft), 'Job Aids-2' (Due: Mon, Jul 31, 2017, Status: Draft), and 'Job Aids-1' (Due: Sat, Dec 31, 2016, Status: Draft). A circled '6' is placed over the 'Job Aids-2' card.

If you are a Manager, the dashboard will have a few additional sections/items available:

7. The Manager/Supervisor **Dashboard** will include assigned direct reports. Their name(s) will appear beneath the **My Direct Reports** header. You will also see the Civil Service classification, overdue tasks, and the ability to create journal entries for each employee in the direct reports section.
8. The **My Tasks** section includes tasks related to performance evaluation (plans) for you and your direct reports.

Evaluation Dashboard

My Tasks [view all >](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	1 Overd
------------	-------------	-----------------------	-----------	--------------	------------	------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids 8	MCSC EMPLOYEE	Job Aids	▲ 12/31

1 - 1

My Evaluations [view all of my evaluations >](#)

Job Aids-3
Due: Tue, Dec 31, 2019
Status: Draft

Job Aids-2
Due: Mon, Dec 31, 2018
Status: Draft

Job Aids
Due: Sun, Dec 31, 2017
Status: Draft

My Direct Reports 9

MCSC EMPLOYEE
PE-Human Resources Analyst

✉
🗨

- When you click on a Direct Report, you are taken to their **Employee Details** page where you can view their position information in addition to their assigned performance evaluation list. The employee's **Dashboard** is not available to the manager/supervisor and will not appear in the list below their picture.

Journal Entries

Journal entries are a helpful tool to encourage communication between managers and direct reports in NEOGOV Perform. Journal entries can be entered from the **Dashboard** and are available to add within the rating card during a performance evaluation (plan) rating.

- Only the original owner of a journal entry can edit or delete it.
- Journal entries are private unless made viewable using the share feature.
- Objectives and competencies can be tagged in the text of a journal entry which allows for filtering within the rating card.

- After logging in, you will be at your **Dashboard**.
- To enter a journal entry for **yourself (as the employee)**, click on the **+ sign** in the upper right hand corner and select **Journal Entry**.

NEOGOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

My Tasks [view all >](#)

7 Total 2 Rating 0 Approve & Sign 5 Sign 0 Approve 0 Other 2 Overdue

Click on the "+" sign and select Journal Entry

Task Journal Entry

- a. A slide-out window appears. Enter and select your **name** and then **enter and format the text**. To **"tag"** an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.

New Journal Entry

Who is this entry about? *

MCSC EMPLOYEE

Type and select your name

B I U [List Icons]

Enter the journal entry here.... You can tag objectives and competencies by typing an "@" sign.

Enter the journal entry here and tag any associated objectives/competencies.

Click on Save

Save

3. As a manager, you can enter a journal entry for a **direct report** by finding the employee in the **My Direct Reports** section, and clicking on the blue paper icon within the information card.

My Tasks [view all >](#)

5 Total 3 Rating 0 Approve & Sign 2 Sign 0 Approve 0 Other 1 Overdue

hide table ^

Task	For Employee	Related To	Due Date
Sign Add an Objective for MCSC MANAGER	MCSC MANAGER	Add an Objective	10/04/2016
Rating For MCSC EMPLOYEE's State Police-Plan Acknowledgement	MCSC EMPLOYEE	State Police-Plan Acknowledgement	12/31/2016
Rating For MCSC EMPLOYEE's State Police-Overall Eval Flow-if Needed	MCSC EMPLOYEE	State Police-Overall Eval Flow-if Needed	12/31/2016
Sign 360 Review for MCSC MANAGER	MCSC MANAGER	360 Review	12/31/2016
Rating For RICHARD GODBOLD's Annual Eval Jan 1-Dec 31, 2016	RICHARD GODBOLD	Annual Eval Jan 1-Dec 31, 2016	12/31/2016

1 - 5 of 5 items

My Evaluations [view all of my evaluations >](#)

360 Review Due: Sat, Dec 31, 2016 Status: Approval

Add an Objective Due: Sat, Dec 31, 2016 Status: Not Started

Job Aids Due: Sat, Dec 31, 2016 Status: Draft

My Direct Reports

MCSC EMPLOYEE PE-Human Resources Analyst 2 10

click on the blue icon to enter a journal entry

BACK & HELP

- a. A slide-out window appears. Enter the **Journal Entry** text in the “click here to start a new entry...” box. Enter and format the text, then click on **Save**. To “tag” an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.

Journal Entries for MCSC EMPLOYEE

Close



Click here to start a new entry...

Type the journal entry text

4. All journal entries created are private (only the creator can view them). However, you can share the journal entry by tagging employees/managers. To tag a journal entry, after creating it, click on the people icon that appears when hovering over the section. Type the name of the employee(s) you would like to tag and select them to share the entry.

10 entries

Print Filter



MCSC EMPLOYEE last edited 12/15/16 10:25:28 AM
New for job aid

To “tag” employees click on the blue people icon that appears when hovering over it.

ENTRY SHARED WITH

Mcsc man



MCSC MANAGER



MCSC MANAGER last edited 11/21/16 02:31:03 PM

5. After a journal entry is shared, the “shared” icon appears.



10 entries



MCSC EMPLOYEE last edited 12/15/16 10:25:28 AM
New for job aid

Shared

7. Journal entries can also be printed or edited by the creator.
8. When finished, click on the close button to return to the Dashboard.

Journal Entries for MCSC EMPLOYEE

Close

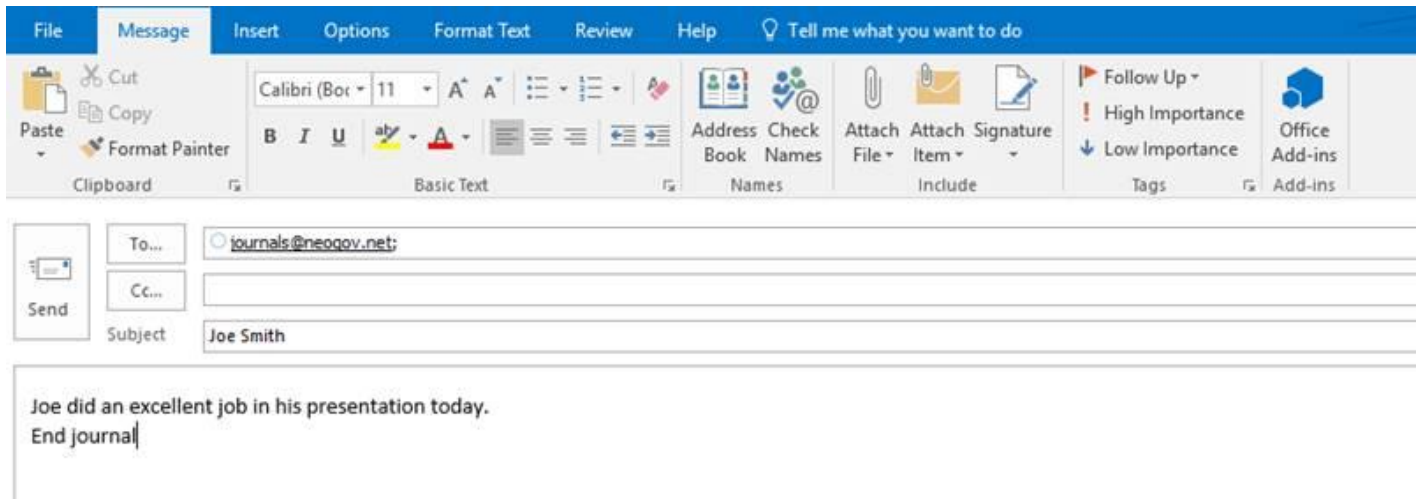


Click here to start a new entry...

Click on close

9. Journal entries can also be added directly from Outlook. To send an email from Outlook to NEOGOV Perform:

- a. Enter the email address journals@neogov.net into the “To” section.
- b. In the “Subject”, enter the **employee name** (only) for whom the journal entry is for. The employee name *must* be spelled correctly and match the employee information in Perform.
- c. Content entered in the email will be loaded as the journal entry. After entering the journal entry content, type **End journal** so that the system can exclude signatures and other miscellaneous text from being included in the journal entry.



Employee Details

1. **Employee Details** contains employee information such as position (Civil Service classification), department, and start date. The items can be viewed two ways, via scrolling or by clicking on the tabs along the top (Employee Details, Evaluations, Tasks, Development Plans, Documents)
2. This page also has the Performance Evaluation and Development Plan sections. **Performance Evaluations (Plans)** will include your current performance evaluation (plan) including the name, type of plan (periodic or probation), and due date. **Development Plans** are not required but can be created to track development of skills for future career growth.

NOTE: Development plans are **rated** in NEOGOV Perform.

3. The **Hierarchy** section displays organizational placement based on reporting relationship. The data that displays is based on settings controlled by security.
4. To return to your Dashboard, click on the **NEGOV** logo at the top left of the screen.

NEOGOV PE Perform Search

Employees Performance Evaluations Library Positions Administrative Trainings Reports Help

PE-Departmental Analyst | Journal Entries 0

Employee Details Evaluations **1** Tasks Development Plans Documents

Employee Information **1**

POSITION TITLE PE-Departmental Analyst	DEPARTMENT PE-ON TEST DEPT	DIVISION
CLASS SPEC PE-DEPARTMENTAL ANALYST		EMAIL
START DATE 11/02/2016		EMPLOYEE NUMBER TEST3
	ACTIVE Yes	ONLINE ACCESS Activated

Hierarchy **3**

- PE-STATE OFFICE A...
- PE-DEPARTMENTAL ...
- PE-Departme...

[View Company](#)

Evaluations **2**

Adding a Task

Due: Sun. Dec 31, 2017 Type: Periodic
Completed: - Archived: No
Status: Draft Actions:

Demo 12/11/17

Due: Sun. Dec 31, 2017 Type: Periodic
Completed: - Archived: No
Status: Draft Actions:

Demo 12/11/17--Rating Step

Due: Sun. Dec 31, 2017 Type: Periodic
Completed: Mon. Dec 1... Archived: No
Status: Completed Actions:

1 - 3 of 4 Items [Show More](#)

Tasks

[+ Add Task](#)

Assignee	Subject	Due Date	Status	Status Date	Actions
No Results Found					
No items to display					

Development Plans **2**

Menu Bar

Employees

1. For an employee (who isn't a manager) the Employee List will display only your employee information. To access your employee profile, click the first name, last name, or employee number, which will take you to the Employee Details page discussed previously in this document.

NEOGOV PE Perform Search MISC EMPLOYEE

Employees Library

Employee List

Show All Employees Bulk Actions

Photo	Employee #	Last Name	First Name	Direct Manager	Position	Start Date	Online Access	Active
	456321	EMPLOYEE	MCSC	MCSC MANAGER	PE-Human Resources...	05/07/2006	Activated	Yes

1 - 1 of 1 items

- For an employee (who **IS** a manager), the **Employee List** will display your own employee record as well as the employees below you in the organization. To access a profile, click the first name, last name, or employee number. This will take you to the associated Employee Details screen.

Employees Performance Evaluations Library Trainings Reports

Employee List

Show All Employees Bulk Actions

Photo	Employee #	Last Name	First Name	Direct Manager	Position	Start Date	Online Access	Active
	123789	MANAGER	MCSC	HR USER	PE-HUMAN RESOURC...	06/22/2002	Activated	Yes
	456321	EMPLOYEE	MCSC	MCSC MANAGER	PE-Human Resources...	05/07/2006	Activated	Yes

Performance Evaluations

- This menu option is only available to **managers** based on assigned security role in the system.
- From the **Performance Evaluation** list, a manager can assign objectives in bulk, export items to Microsoft Excel, or print the selected evaluations. Assigning objectives in bulk is covered in the **Bulk Objectives** section of this document.

NEOGOV PE Perform Search

Employees Performance Evaluations Library Trainings Reports

Evaluation List

Evaluation List Bulk Actions

Name	Employee #	Employee	Department	Raters of	Type
<input type="checkbox"/> Job Aids	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic
<input type="checkbox"/> Job Aids	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic
<input type="checkbox"/> Job Aids-2	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic
<input type="checkbox"/> Job Aids-3	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic
<input type="checkbox"/> Job Aids-2	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic
<input type="checkbox"/> Job Aids-3	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic
<input type="checkbox"/> Job Aids-1	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic

Actions Done

EXPORT ACTIONS

Export to PDF

Export to Excel

Export to CSV

EVALUATION BULK ACTIONS

Assign Objectives

Print

Library

1. Department objectives will appear in the **Objective List** as they are added by departments. Objectives can be added to an evaluation using **“From Library”** which will be covered in the **Evaluation** section of this document.
2. Objectives can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.

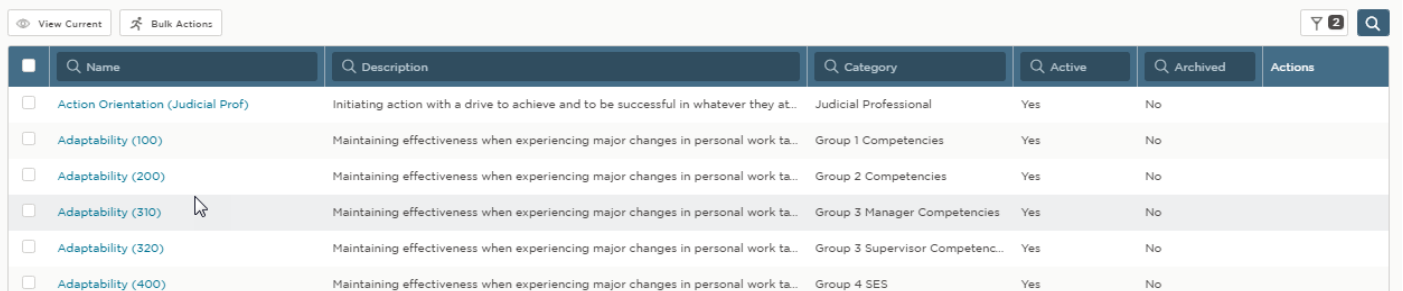
Objective List



	Name	Description	Category	Active	Archived	Actions
<input type="checkbox"/>	1901 CSC Follow the Approved Standardize...	Follow the approved standardized office set-up. Use consistent and uniform org...	Department Plan	Yes	No	

3. The **Competency List** is a comprehensive listing of all 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.
4. Competencies can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.

Competency List



	Name	Description	Category	Active	Archived	Actions
<input type="checkbox"/>	Action Orientation (Judicial Prof)	Initiating action with a drive to achieve and to be successful in whatever they at...	Judicial Professional	Yes	No	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 1 Competencies	Yes	No	
<input type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 2 Competencies	Yes	No	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 3 Manager Competencies	Yes	No	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 3 Supervisor Competenc...	Yes	No	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 4 SES	Yes	No	

Trainings

This section is not currently being used by the State of Michigan.

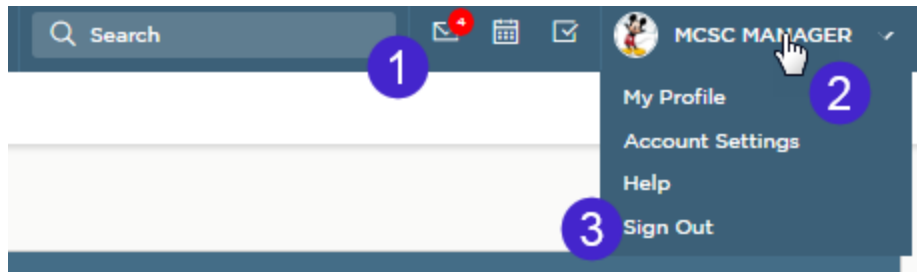
Reports

This menu option is only available to the Manager role. Managers have the ability to run reports related to their direct reports. Reports, in detail, will be covered in the **Reports** section of this document.

Other Items

1. Also available along the upper-right of your screen is a search bar and links to your **Messages**, **Calendar**, and **Task Listing** (all specific to NEOGOV Perform).
2. Further, if you hover over your **Name** a profile menu will display. This menu provides quick access to your employee profile (**My Profile**), the Perform Help Center (**Help**), **Account Settings**, or **Sign-Out**.

3. To exit NEOGOV Perform, click on **Sign Out**.



Performance Evaluation (Plan) Overview

Employee performance evaluations (plans) will be established for all employees. These evaluations will include tasks to acknowledge the evaluation (plan) and ratings. In addition to the acknowledgement tasks, these evaluations may also include tasks to self-rate your own plan. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the “current” view of the **My Tasks** section on the dashboard.

NOTE: The **acknowledgement task** will not populate in the **tasks section** of the dashboard for the employee until the performance evaluation (plan) has been started by the manager/supervisor. How to acknowledge a performance evaluation (plan) and rating is covered in the **Acknowledgement of Evaluation (Plan) and Acknowledgement of Rating sections** of this document.

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	04/23/2016
Sign MSHDA Demo 3-29-16 for MCSC EMPLOYEE	MCSC EMPLOYEE	MSHDA Demo 3-29-16	12/31/2016

Evaluation Card	Due Date	Status
Demo of Job Aids	Sat, Dec 31, 2016	Not Started
MSHDA Demo 3-29-16	Sat, Dec 31, 2016	Approval
Job Aids	Thu, Dec 31, 2015	Draft

1. Click on the link for **View All of My Evaluations** or the **Evaluation Card** displaying on the dashboard.

NOTE: Only the most recent 3 evaluations will display as evaluation cards on the dashboard. They are sorted by due date in descending order.

The screenshot shows the 'My Tasks' section with a summary bar and a table of tasks. Below it is the 'My Evaluations' section with three evaluation cards. Two callout boxes are present:

- Callout 1: "Click on View All Of My Evaluations to go to the Evaluation Detail Page" (pointing to the 'view all' link in the My Evaluations section).
- Callout 2: "Click on the evaluation card to be taken to the specific evaluation" (pointing to one of the evaluation cards).

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	04/23/2016
Sign MSHDA Demo 3-29-16 for MCSC EMPLOYEE	MCSC EMPLOYEE	MSHDA Demo 3-29-16	12/31/2016

Task	Due Date	Status
Demo of Job Aids	Due: Sat, Dec 31, 2016	Status: Not Started
MSHDA Demo 3-29-16	Due: Sat, Dec 31, 2016	Status: Approval
Job Aids	Due: Thu, Dec 31, 2015	Status: Draft

2. Clicking on the **Evaluation Card** will take you directly to the related **Evaluation Details** page.
3. Clicking on **View All of My Evaluations** will take you to the **Employee Details** page where the performance evaluation (plan) will be listed in the **Performance Evaluations** section of the page.
4. From the **Employee Details** page, click on the evaluation (plan) name.

The screenshot shows the 'Employee Details' page for a PE-Departmental Analyst. The page is divided into two main sections: 'Employee Information' and 'Hierarchy'.

POSITION TITLE	DEPARTMENT	DIVISION
PE-Departmental Analyst	PE-ON TEST DEPT	
CLASS SPEC	EMAIL	
PE-DEPARTMENTAL ANALYST		
START DATE	EMPLOYEE NUMBER	
11/02/2016	TEST3	
ACTIVE	ONLINE ACCESS	
Yes	Activated	

The Hierarchy section shows a tree structure with the following nodes:

- PE-STATE OFFICE A...
- PE-DEPARTMENTAL ...
- PE-Departme...

A "View Company" link is located at the bottom right of the Hierarchy section.

Evaluations

Adding a Task

Due: Sun. Dec 31, 2017 Type: Periodic
 Completed: - Archived: No
 Status: Draft Actions:

Demo 12/11/17

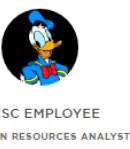
Due: Sun. Dec 31, 2017 Type: Periodic
 Completed: - Archived: No
 Status: Draft Actions:

Demo 12/11/17--Rating Step

Due: Sun. Dec 31, 2017 Type: Periodic
 Completed: Mon. Dec 1... Archived: No
 Status: Completed Actions:

1 - 3 of 4 Items [Show More](#)

5. The **Evaluation Detail** page lists information specific to your performance evaluation (plan) including name, type (periodic or probation), your name, position, and department/division.
6. The performance evaluation (plan) will be in **Draft Status** upon receipt and will remain in that status until it is started by the manager.
NOTE: Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started the evaluation
7. 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**.
8. The **Overall Rating** will display as Pending until the performance evaluation (plan) rating has been completed.
9. 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.



Employee

Reports

Org Chart

Manager

Job Aids-1
MCSC EMPLOYEE

print preview
copy evaluation
print blank form
start evaluation

Overall Rating

Pending

General Information

<p>DUE DATE Sat. Dec. 31, 2016</p>	<p>STATUS Draft</p>
<p>Evaluation Name Job Aids-1</p> <p>Type Periodic</p> <p>Archived No</p>	<p>Employee MCSC EMPLOYEE</p> <p>Position PE-Human Resources Analyst</p> <p>Department PE-CIVIL SERVICE COMMISSION</p>

10. **Objectives** are the individual actions 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, Measurable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating or understanding SMART objectives.
11. Employees/Managers can add, edit, and delete objectives until the performance evaluation (plan) is started. Some Managers/Supervisors may solicit employee assistance in the addition of objectives. Other Managers/Supervisors may complete all the evaluation (plan) updates in Perform.
NOTE: Only the user entering the objective can edit or delete it.

NEOGOV PE Perform Search MISC EMPLOYEE

Employees Library

MISC EMPLOYEE
PE-HUMAN RESOURCES ANALYST

My Dashboard
Employee
Reports
Org Chart

Manager

General

DUE DATE
Thu. Dec. 31, 2015

STATUS
Draft

Evaluation Name	Job Aids	Employee	MISC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE COMMISSION

Content

OBJECTIVE SECTION | STANDARD 3 POINT SCALE + Add Items

Objective Section

Items	Description	Progress	Actions
1901 CSC Utilize Wee...	Utilize weekly reports effectively to monitor and ...	0%	X
1901 CSC Utilize the ...	Utilize the Siebel application fully, including the ...	0%	X
1901 CSC Follow the ...	Follow the approved standardized office set-up. ...	0%	X

12. **Competencies** are assigned to the performance evaluation (plan) based on Equitable Classification Plan (ECP) Group.

13. Employees/Managers can add, edit, and delete competencies until the performance evaluation (plan) is started. Some Managers/Supervisors may solicit employee assistance in the addition of competencies. Other Managers/Supervisors may complete all the evaluation (plan) updates in Perform.

COMPETENCY SECTION | STANDARD 3 POINT

Competency Section + Add Items

Items	Description	Actions
Contributing to Team Success (10)	Actively participating as a member of a team to move the team toward the completion of goals.	X
Decision Making (100)	Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw co...	X
Interpersonal Skills (100)	Considering and responding appropriately to the needs, feelings, and capabilities of others; adjusting approaches to ...	X
Job Knowledge (100)	Behaviors should be specific to the individual job.	X
Managing Work (100)	Effectively managing one's time and resources to ensure that work is completed efficiently; makes timely requests fo...	X
Quality Orientation (100)	Accomplishing tasks by considering all areas involved, no matter how small; showing concern for all aspects of the jo...	X

14. Notes/Attachments can be added within the evaluation with items specific to the rating period.

NOTE: This section cannot be modified once entered. Please contact the NEOGOV mailbox at MCSC-NEOGOV@michigan.gov for assistance in editing/removing content from this section.

Notes & Attachments

Notes & Attachments

+ Add Notes & Attachments

15. The Process Timeline portion of the performance evaluation (plan) includes the following:

- a. **Evaluation (Plan) Acknowledgements** are defaulted via the performance evaluation (plan) program. The acknowledgement is used to have an employee 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.

NOTE: The evaluation (plan) acknowledgement task is not available to an employee until the performance evaluation is started by the manager. How to acknowledge a performance evaluation (plan) is covered the **Acknowledgement of Evaluation (Plan) section** of this document.

Process + Add Task

Employee Acknowledgement

Signature	Due	Status	Step is required
MCSC EMPLOYEE	Wed, Dec 23, 2015	Pending 12/16/2015	Yes

- b. **Self/Peer Ratings** can be used to assign a self/peer rating to the performance evaluation (plan). Please contact your HR Office to have self/peer ratings added to the evaluation (plan).
- c. The **Rating of Record (supervisor/manager rating)** is assigned on the performance evaluation (plan) program.

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

Ratings

2

Rating	Due	Status	Step is required	Weight
MCSC MANAGER	Thu, Dec 31, 2015	Pending 12/16/2015	Yes	100 %

- d. The **Rating Acknowledgements** are defaulted via the performance evaluation (plan) program. 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 the **Acknowledgement of Rating section** of this document.

After Ratings

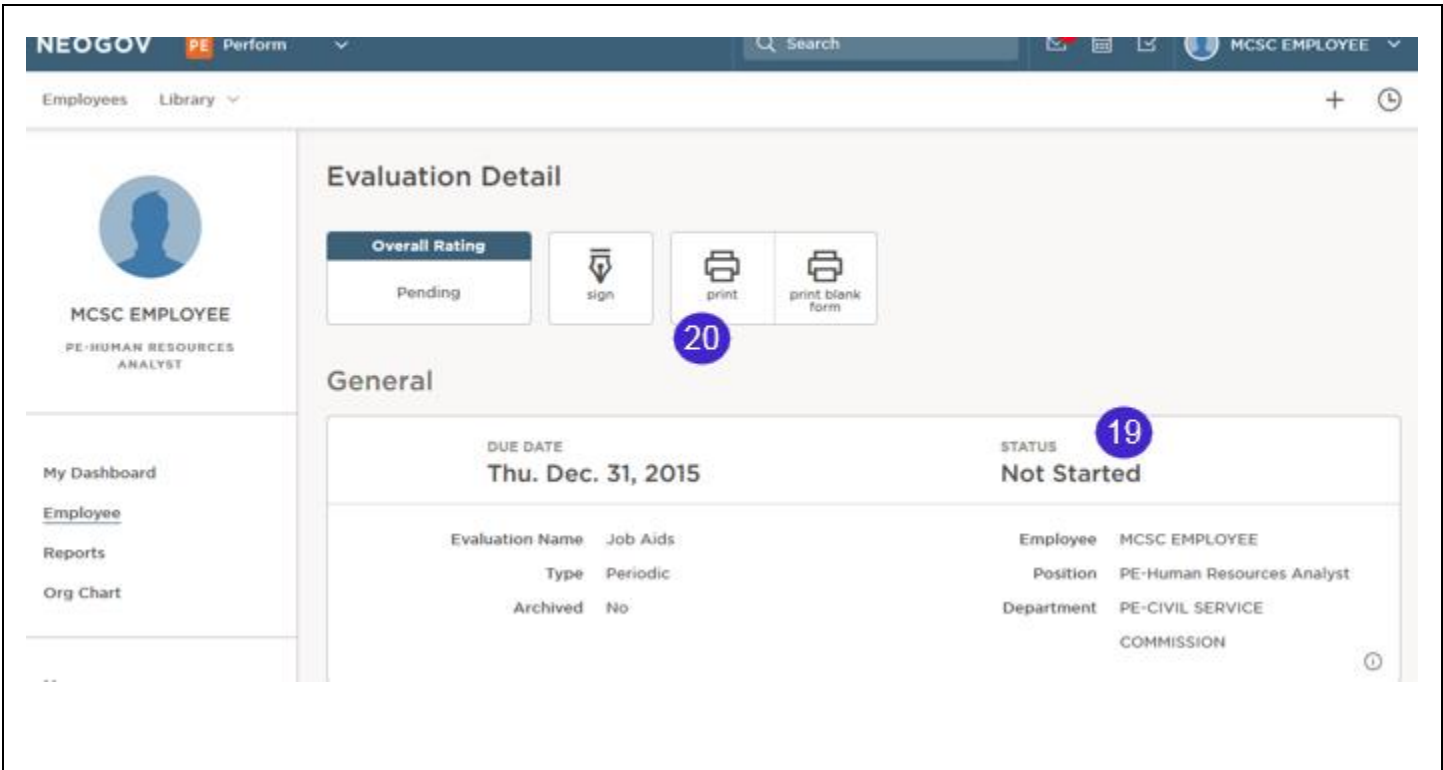
3

Signature	Due	Status	Step is required
MCSC EMPLOYEE	Thu, Dec 31, 2015	Pending 12/16/2015	Yes

Rating Acknowledgement

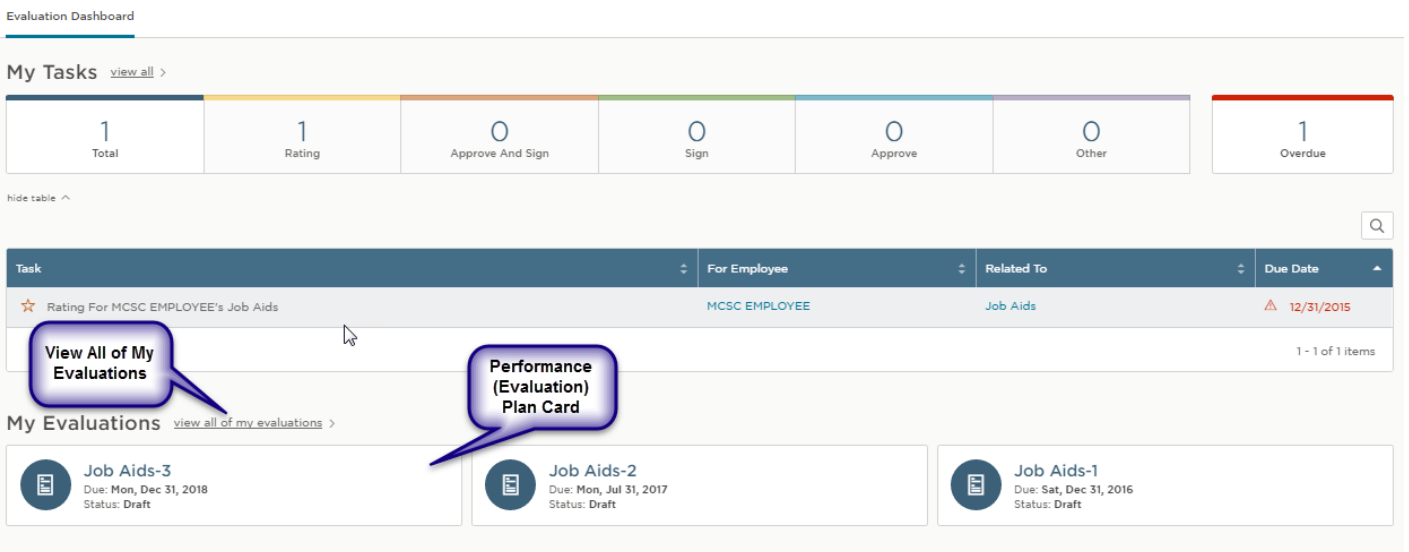
Evaluation Due Date	Thu, Dec 31, 2015
---------------------	-------------------

- e. Tasks can be added to the performance evaluation (plan) and will be covered in the **Notes/Attachments/Tasks** section of this document.
16. When the performance evaluation (plan) is ready for employee acknowledgement, the Manager/Supervisor will **start** the evaluation (plan). Once the evaluation (plan) is started, changes cannot be made to the evaluation (plan) unless it is reverted to draft status by using the **Pause Evaluation** button at the top of the evaluation. This will be covered in more detail in the **Edit/Start Performance (Evaluation) Plan** section of this document.
17. After the performance evaluation (plan) is started, an email is sent to the employee asking them to acknowledge the evaluation (plan). After the acknowledgment of the evaluation (plan), if additional acknowledgements are not required, a **Rate** star appears for the manager indicating the evaluation (plan) is ready for rating. (A rate star will only populate for the employee if a self-rating is assigned to the evaluation).
18. Once ready for acknowledgement/review, the **Status** of the performance evaluation (plan) changes from **Draft** to **Not Started**.
19. The performance evaluation (plan) can now be printed using the **Print** feature.



Edit/Start Performance Evaluation (Plan)

1. After logging in, from the **Dashboard**, one of the following will apply:
 - a. **Employee**—Click on the **performance evaluation (plan) card** that you wish to view/edit, which will take you directly to the related **Evaluations Details** page. Or, click on the link **View All of My Evaluations** to go to the **Employee Details** page where the performance evaluation (plan) will be listed in the **Performance Evaluations** section of the page.



- b. **Manager**—Click on the direct report whose performance evaluation (plan) you wish to view/edit/start. In doing so, you will be taken to your direct report’s **Employee Details page** (covered in the Overview of NEOGOV PE) where you can select the **Performance Evaluation (Plan)** to edit/start.

My Tasks [view all >](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	1 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids	MCSC EMPLOYEE	Job Aids	▲ 12/31/2015

1 - 1 of 1 items

My Evaluations [view all of my evaluations >](#)

Job Aids-3
Due: Tue, Dec 31, 2019
Status: Draft

Job Aids-2
Due: Mon, Dec 31, 2018
Status: Draft

Job Aids
Due: Sun, Dec 31, 2017
Status: Draft

My Direct Reports

MCSC EMPLOYEE
PE-Human Resources Analyst

Click on the Direct Report



PE-Departmental Analyst |

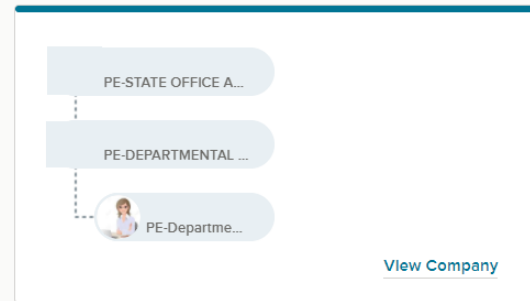
Journal Entries | 0

Employee Details Evaluations Tasks Development Plans Documents

Employee Information

POSITION TITLE PE-Departmental Analyst	DEPARTMENT PE-ON TEST DEPT	DIVISION
CLASS SPEC PE-DEPARTMENTAL ANALYST	EMAIL	
START DATE 11/02/2016	EMPLOYEE NUMBER TEST3	
ACTIVE Yes	ONLINE ACCESS Activated	

Hierarchy



Evaluations

Adding a Task

Due: **Sun. Dec 31, 2017** Type: **Periodic**
Completed: - Archived: **No**
Status: **Draft** Actions:

Click on the Evaluation Name

Demo 12/11/17

Due: **Sun. Dec 31, 2017** Type: **Periodic**
Completed: - Archived: **No**
Status: **Draft** Actions:

Demo 12/11/17--Rating Step

Due: **Sun. Dec 31, 2017** Type: **Periodic**
Completed: **Mon. Dec 1...** Archived: **No**
Status: **Completed** Actions:

1 - 3 of 4 Items [Show More](#)

Objectives

1. On the **Evaluations Details page**, to **add objectives** to the evaluation (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 ONLY using From Objective Library and New Objective.**

NOTE: Employees can edit/add/delete objectives until the performance evaluation (plan) is started by the manager.

Content

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Items	Description	Progress
No items to display		


+ Add Items

- From Objective Library
- From Position
- From Class Specification
- From Development Plan
- From Last Scheduled Evaluation
- From Employee Goal
- New Objective

2. The Add Objective window will open. Add the **Objective Title** in the **Objective Name Field**. A due date is not required but can be entered if desired. add 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. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Under the additional settings tab, a **priority** can be selected. **Reminder settings** can also be set.

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.

 **Add Objective**

General **Save**

* Fields are required.

Objective Name * **Objective Name**
Adding a New Objective **Select a Category**

Objective Due Date **Due Date** Category * Employee **Select a Category**

Description **Enter the Description**
Adding a new objective for job aids

Add to Objective Library

ADDITIONAL SETTINGS

Priority Level **Priority Level**


REMINDER SETTINGS

Reminder Notices Off On **Reminder Settings**

30 Days Before
 2 Weeks Before
 1 Week Before
 Custom Days Before

Overdue Notices Off On




Every Week
 Every 2 Days
 Every Day
 Custom Every Days



3. Click on **Save**
4. Repeat these steps for any additional objectives.
5. Each objective is accompanied by a **Progress** slider bar, which may be used to update the percentages completed for that objective. Reporting capabilities are available for this information. (The slider bar appears on the **Evaluation Details page** in the Objectives section.)

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 first row, stating "The progress slider bar".

6. To **Edit** an **Objective**, click on the pencil icon.

NOTE: Only the creator of the objective can edit it. Objectives added as “New Objectives” can be edited (Objectives added from the Library are not editable).

7. 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.

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

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

Note: Two callout bubbles are present. One points to the 'x' icon in the first row, stating "To delete an objective click the 'x'". The other points to the pencil icon in the second row, stating "To edit an objective click on the pencil icon".

Bulk Objectives

If you are a **Manager**, the ability to add an objective to multiple employees at the same time is available using a **bulk tool**.

1. In the **Performance Evaluations** menu, select **Performance Evaluation List**.

The **Evaluation List** will populate, displaying only the employee evaluations associated to the manager.

NEO GOV PE Perform

Performance Evaluations

My Tasks

Total Rating Approve & Sign Sign Approve Other Overdue

Task For Employee Related To Due Date

No Results Found

No items to display

Select Performance Evaluation List

2. On the **Evaluation List**, select the employees/evaluations that will receive the objective(s). Objectives can be added to evaluations in **Draft** and **Not Started** status only.

Evaluation List

3 records are selected. Select all 9 records Clear selection

Select the Employee/Evaluations that will receive the Objective(s)

Name	Employee #	Employee	Department	Raters of Rec	Type	Due Date	Status
<input type="checkbox"/> Demo-Peer Rating	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	MICHAEL WINTERS	Periodic	12/31/2015	Draft
<input type="checkbox"/> Job Aids	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Approval
<input checked="" type="checkbox"/> Job Aids	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	CHRISTINE SPITZLEY	Periodic	12/31/2016	Draft
<input type="checkbox"/> Job Aids 2	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Approval
<input type="checkbox"/> Testing Future Goals 2016	1072756	JESSICA ZWEERING	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Completed
<input checked="" type="checkbox"/> Testing Future Goals 2017	1072756	JESSICA ZWEERING	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2017	Draft
<input type="checkbox"/> Bi-Monthly PE Meeting 9/13/2016	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Draft
<input type="checkbox"/> Add an Objective	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	CHRISTINE SPITZLEY	Periodic	12/31/2016	Not Started
<input checked="" type="checkbox"/> Add an Objective	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Not Started

1 - 9 of 9 items

3. Click on the **Bulk Actions** button. Select **Assign Objectives** from the Evaluation Bulk Actions section.

NEO GOV PE Perform

Evaluation List

2 records are selected.

Click on Bulk Actions

Name	Employ	Employ	Department	Raters of	Typ
<input checked="" type="checkbox"/> DHS-CHILD WELFARE CPS WORKER	1234567		PE-CIVIL SERVICE COMMISSION		
<input checked="" type="checkbox"/> DHS-DISABILITY EXAMINER	1234567		PE-CIVIL SERVICE COMMISSION		
<input type="checkbox"/> DHS-STATE BUREAU ADMINISTRATOR	1234567		PE-CIVIL SERVICE COMMISSION		Periodic

Click on Assign Objectives

Actions

- EXPORT ACTIONS
 - Export to PDF
 - Export to Excel
 - Export to CSV
- EVALUATION BULK ACTIONS
 - Change Due Date
 - Delete
 - Assign Objectives

- On the **Objectives Assignment** page, click on the **+Objective** button to add the Objective. **From Library** allows for the assignment of existing Objectives housed in the Objective Library. **New Objective** allows for the creation of a new Objective.

NEO GOV PE Perform

Search

MCSC MANAGER

Employees Performance Evaluations Library Trainings Reports

Step 2 of 3: Objectives Assignment

Click on +Objective to add an Objective.

+ Objective

From Library

New Objective

No Objectives have been added

Selected Evaluations ▲ 1 section(s) still blank

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
Add an Objective	MCSC EMPLOYEE	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Not Started	No	Objective Section
Job Aids	MCSC MANAGER	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Draft	No	Objectives
Testing Future Goals 2...	JESSICA ZWEERING	PE-CIVIL SERVICE CO...	Periodic	12/31/2017	Draft	No	Select one

1 - 3 of 3 items

Cancel Next

- Enter the **Objective Title, Description**, and select a **Category** (usually Employee). When finished, click on **Add**.

Add Objective

Cancel Save

Click on Save

* Fields are required.

Enter the Objective Name

Objective Name *

Objective Due Date

select date (MM/DD/YYYY)

Category *

Select one

New

Description

Add a description if applicable

Add to Objective Library

ADDITIONAL SETTINGS

REMINDER SETTINGS

6. Enter any additional Objectives that should be added to the selected employees via the bulk action tool. When finished, select **Objective** for the section where the Objective(s) will be added within the evaluation. Click on **Next**.

NEO GOV PE Perform

Employees Performance Evaluations Library Trainings Reports

Step 2 of 3: Objectives Assignment

Entering a New Objective This is where I enter the text.

Selected Evaluations

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
Add an Objective	MCSC EMPLOYEE	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Not Started	No	Objective Section
Job Aids	MCSC MANAGER	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Draft		Objectives
Testing Future Goals 2...	JESSICA ZWEERING	PE-CIVIL SERVICE CO...	Periodic	12/31/2017	Draft		Objectives

1 - 3 of 3 items

Cancel Next

Click on Next

Select Objective for the section where the Objective(s) will be added within the evaluation.

7. On the Confirmation page, review the data and click on **Submit** to add the Objective(s).

NEO GOV PE Perform

Employees Performance Evaluations Library Trainings Reports

Step 2 of 3: Confirmation Page

Employee Name	Evaluation Name	Evaluation Type	Evaluation Status	Evaluation Due Date	Section Name	Section Response Format
JESSICA ZWEERING	Testing Future Goals 2017	Periodic	Draft	12/31/2017	Objectives	Standard 3 Point Scale
MCSC EMPLOYEE	Add an Objective	Periodic	Not Started	12/31/2016	Objective Section	Standard 3 Point Scale
MCSC MANAGER	Job Aids	Periodic	Draft	12/31/2016	Objectives	Standard 3 Point Scale

1 - 3 of 3 items

Edit Submit

Click on Submit to add the Objective(s)

8. A confirmation page will display when the action is complete.

Action progress

If selecting many records, the bulk action may require some time to complete. You can check the progress and results of the bulk action on this screen.

① Bulk operation is complete, records that could not be processed are shown below.

100%

Need to go? You can always find this screen by visiting this link:

<https://performance.uat.neopov.net/eval2/BulkOperationStatus/33d4c514-7ef1-4179-970c-fb99c79715e3>

Failed Records

Name	Employee	Type	Due Date	Status	Released	Overdue	Language	Archived	Status Message
No Results Found									
No items to display									

Competencies

1. On the **Evaluations Details page**, to add **Competencies** to the evaluation (plan), click on **Add Items** and select **From Library** or **From Class Specification**.

NOTE: From Library allows you to select the competencies to add. **From Class Specification** adds every competency from the ECP Group to the section.

NOTE: Employees can add/delete competencies until the performance evaluation (plan) is started.

2. **Competencies** are assigned to the performance evaluation (plan) based on ECP (Equitable Classification Plan) Group. 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.
3. **Click on Section A** in the Compensation Manual.

Compensation Plan 10/01/2016 (Interactive Version)

- Section A - Alphabetic List of Classes 10/01/2016
- Section B - Numeric List of Pay Ranges 10/01/2016
- Section C - Pay Schedules for Classifications in Performance Pay Programs, Senior Attorney, IT Analysts/Coordinators P11, State Police Digital Forensics Analyst P11, Student Assistants, Transitional and Bargaining Unit T01 10/01/2016
- Teacher Pay Schedules 10/01/2016

Section A

4. 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 and a Group 3 Supervisor); CL4 is Group 4.

HRMN Position Description	Grade	Core Pos Code	Schedule	Unit	Exempt	Salary Class	Pay Plan	Shift	Job Cat	Job Class	Min.	Max.
Accountant Manager-4	15	ACCTMGR4	NERE-188	Y51	Y				2	CL3	\$30.01	\$44.41
Accountant-A	12	ACCOUNTA	NERE-180	Y23	Y				2	CL2	\$22.71	\$33.21

5. Select the appropriate competency by clicking in the checkbox in front of it and selecting **Save**.

NOTE: Competencies are entered in NEOGOV Perform with (100), (200), (310), (320), or (400) after them. The following applies:

- Group 1 competencies are followed by (100)
- Group 2 competencies are followed by (200)
- Group 3 MGR competencies are followed by (310)
- Group 3 SPV competencies are followed by (320)
- Group 4 competencies are followed by (400)

Add Items

Competency library

Filter the Results	Category	Description
<input type="checkbox"/> Adaptability (100)	Group 1 Competencies	Maintaining effectiveness when experiencing major changes in personal work tasks or the work environ...
<input type="checkbox"/> Applied Learning (100)	Group 1 Competencies	Assimilating and applying new job-related information in a timely manner.
<input type="checkbox"/> Building Customer Loyalty (100)	Group 1 Competencies	Effectively meeting customer needs; building productive customer relationships; taking responsibility for...

Click on Save

6. To **delete** a competency, click on the “x” icon.

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

Tasks

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

Process

+ Add Task

Before Ratings

Add Task

3. Complete the applicable boxes:
 - a. Enter a name in **Choose Person**.
 - b. Enter a title in **Title**.
 - c. Enter a **Description** if necessary.
 - d. Select a **Due Date** from the calendar.
 - e. **Reminder Settings** can be set prior to the task due date or after.
 - f. Click on **Save** or **Cancel**

Add Task

Cancel Save

Step Settings

Assignee Type
Employee

Choose Person
A Search employee Choose Person

Title
B Enter a Title

Description
C Enter a Description

Due Date
D 03/07/2017 Select a Due Date

Reminder Settings ^

Reminder Notices
E Off On
30 Days Before
2 Weeks Before
1 Week Before
Custom 0 Days Before

Overdue Notices
Off On
Every Week
Every 2 Days
Every Day
Custom Every Days

Notes & Attachments

1. **Notes & Attachments** can be added to the performance evaluation (plan) using the **Add Notes & Attachments** button.

The screenshot shows a user profile for 'MCSC EMPLOYEE' (PE-HUMAN RESOURCES ANALYST) on the left. The main area displays a 'Competency Section' with a table of items and their progress. Below the table is a 'Notes & Attachments' section with a '+ Add Notes & Attachments' button. A callout bubble points to this button with the text 'Click on Add Notes & Attachments'.

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%	× ↗

COMPETENCY SECTION | STANDARD 3 POINT SCALE

Competency Section

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...	×

Notes & Attachments

+ Add Notes & Attachments

1. Notes can be typed directly. Some formatting including a spell-checking function is available. Attachments can be added by using the **+Attachment** button. If **Private Note** is checked, only the manager/supervisor can see the note. Click **Save**.

The screenshot shows the 'Add Note/Attachment' dialog box. It has a 'Cancel' button and a 'Save' button. The 'Note' field contains a rich text editor with a toolbar (B, I, U, etc.) and a callout bubble pointing to it with the text 'Add the text for the Note'. Below the note field is an 'Attachment' section with a '+ Attachment' button and a callout bubble pointing to it with the text 'Browse for an Attachment'. At the bottom, there are checkboxes for 'Private Note' and 'Use As Rating Form', with a callout bubble pointing to 'Private Note' and the text 'Private Note'. A note at the bottom states '* limit one attachment per note.'.

Add Note/Attachment

Cancel Save

Note

Add the text for the Note

Attachment

Browse for an Attachment

Private Note

* limit one attachment per note.

Start Evaluation

1. When the performance evaluation (plan) is ready for employee acknowledgment (certification), it can be **started** by clicking on the **play button, Start Evaluation**. Once the evaluation (plan) is started, changes cannot be made to the evaluation (plan) unless reverted to **draft** status by clicking on the **Pause Evaluation** button.

The screenshot shows a user interface for starting an evaluation. On the left, there is a profile card for an 'MCSC EMPLOYEE' with the title 'PE-HUMAN RESOURCES ANALYST'. The main content area is titled 'Evaluation Detail' and contains a box for 'Overall Rating' which is currently 'Pending'. To the right of this box are three buttons: 'print', 'print blank form', and 'start evaluation'. A blue callout bubble with a white border points to the 'start evaluation' button, containing the text 'Click on Start Evaluation'. Below the 'Evaluation Detail' section is a 'General' section.

2. After the performance evaluation (plan) is started, an email is sent to the employee notifying them to acknowledge the evaluation (plan). Acknowledgment of the evaluation (plan) is the first step in the evaluation process.
3. The performance evaluation (plan) can be paused/reverted to draft status if changes need to be made to any part of it via the **pause button**. If changes are made to the Objectives and/or Competencies sections, once the evaluation (plan) is **started** again, the **Acknowledgement email** for the employee will be retrigged asking for their signature (certification).

This screenshot is similar to the previous one, showing the same profile card and 'Evaluation Detail' section. However, the 'start evaluation' button has been replaced by a 'pause evaluation' button, which features a pause icon (two vertical bars). A blue callout bubble points to this button with the text 'Pause Evaluation'.

4. Once started, the **Status** of the performance evaluation (plan) changes from **Draft** to **Not Started**.

Acknowledgement of Evaluation (Plan)

1. When an employee and manager agree on the performance evaluation (plan) established for the review period, including objectives and competencies, the manager will start the evaluation, locking it to additional changes. the employee will receive an **email** instructing them to login to NEOGOV Perform to acknowledge the performance evaluation (plan). The email will look like the one below.

NEOGOV

Acknowledgement of evaluation plan **Testing New Enhancements 1-20-15** has been assigned to you in **NEOGOV PE**. Please use the link below to login, view, and acknowledge the evaluation plan.

Subject: [Acknowledge the Evaluation Plan Testing New Enhancements 1-20-15](#)
Due Date: 02/19/2015
Priority: Medium
Status: Current
Comment:

Clicking on the link will take you to the NEOGOV login page

2. On the **Dashboard** screen, the employee will see an Acknowledgement task listed in the **My Tasks** section. Click on the subject, **Sign...** that will take you to the Acknowledgement window.

The screenshot shows the NEOGOV dashboard for a user named 'MCS C EMPLOYEE'. The 'My Tasks' section displays a progress bar with categories: Total (1), Rating (0), Approve & Sign (0), Sign (1), Approve (0), Other (0), and Overdue (0). Below this is a table with one task: 'Sign Enhancements Demo 4-26-16 for MCS C EMPLOYEE'. A callout bubble points to the 'Sign' column of this task with the text 'Click on Sign... to go to the Acknowledgement window'. The 'My Evaluations' section shows three evaluation cards: 'Demo of Job Aids' (Due: Sat, Dec 31, 2016, Status: Not Started), 'Enhancements Demo 4-26-16' (Due: Sat, Dec 31, 2016, Status: Not Started), and 'Job Aids' (Due: Thu, Dec 31, 2015, Status: Draft).

3. In the **Evaluation Acknowledgement (Before Ratings)** window, review the assigned performance evaluation by clicking on each section title

Before Ratings

The 'Before Ratings' window displays the following information: Employee name 'MCS C EMPLOYEE' (PE-Human Resources Analyst), Evaluation Name 'Job Aids', and Due Date 'Sat. Dec. 31, 2016'. A 'Sign' button is visible in the top right corner, with a callout bubble saying 'Click on Sign'. The 'Content' section is divided into 'Objective Section' and 'Competency Section'. The 'Objective Section' is expanded, showing a table with columns 'Name' and 'Description'. A callout bubble points to the 'Objective Section' title with the text 'Review assigned Objectives and Competencies by clicking on the section title'. The table contains one row: 'Receive Customer Rating of at least 4.0 ou...' with the description 'This objective is measured by the annual survey. If employee does not get a rating of 4.0, employee will meet weekly with supervisor.'

4. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge the evaluation (plan) by clicking on **Submit**. The evaluation will now be available to the manager for rating.

NOTE: Clicking on the **Cancel** button will return you to your dashboard without acknowledging the evaluation (plan). If you do not acknowledge your evaluation (plan), please follow up with your manager.

NEO GOV PE Perform

Employees Library

Before Ratings

MCSC EMPLOYEE
PE-Human Resources Analyst

EVALUATION NAME: **Job Aids** DUE DATE: **Sat. Dec. 31**

Content

Objective Section | STANDARD 3 POINT SCALE

Objective Section

Name	Description
Receive Customer Rating of at least 4.0 ou...	This objective is measured by the annual survey. If employee does not

Sign

Cancel Submit

Comments

Write comment

Please sign your name below

Are you sure you wish to acknowledge the plan at this time? By selecting OK, I certify that I have reviewed the competencies and/or performance objectives/factors identified on this form.

MCSC EMPLOYEE

MCSC EMPLOYEE July 26, 2016

Auto-Generate Draw Signature

5. The **Acknowledgement** will no longer appear on the **Dashboard** screen.

NOTE: If a performance evaluation (plan) is reverted to Draft Status, and a change is made to Objectives and/or Competencies, a new email will be triggered asking for acknowledgement of the updated evaluation (plan). Follow the steps above to re-acknowledge the modified performance evaluation (plan).

Rating (Both Employee Self-Rating and Rater of Record-Manager)

1. There are two options to get to the Rate screen:

Option 1:

On the **Dashboard** screen in the **My Tasks** section click the **Rate** link in the **Task** column.

NEO GOV PE Perform

Employees Library Trainings Reports

My Tasks [view all](#)

1 Total 1 Rating 0 Approve & Sign 0 Sign 0 Approve 0 Other 0 Overdue

hide table

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Demo of Job Aids	MCSC EMPLOYEE	Demo of Job Aids	12/31/2016

Click on the link to be taken to the rate screen

My Evaluations [view all of my evaluations](#)

Job Aids
Due: Sat, Dec 31, 2016
Status: Draft

Demo-Peer Rating
Due: Thu, Dec 31, 2015
Status: Completed

MCSC PROB-1
Due: Thu, Dec 31, 2015
Status: Draft

My Direct Reports

MCSC EMPLOYEE
PE-Human Resources Analyst

Option 2:

On the **Dashboard** screen click on the **Evaluation Card** that needs to be rated.

On the Evaluation Detail page, Click on the **Rate** star.

NEOGOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

Job Aids
MCSC EMPLOYEE

rate print preview print blank form

Click on the Rate Star

Overall Rating
Pending

General Information

DUE DATE
Sat. Dec. 31, 2016

STATUS
Not Started

Evaluation Name	Job Aids	Employee	MCSC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE COMMISSION

2. On the **Performance Evaluation Rating Form** screen, complete the **Objective and Competency Sections** by clicking on each Objective/Competency title to open the associated rating window.

Note: You can also navigate through the objectives and competencies by clicking **Next**, **Prev**, or **Done** as you complete the rating.

NEOGOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

< back to evaluation detail page Overall Rating Not Available Submit Evaluation

Job Aids

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Click on the Objective title to open the rating window

Receive Customer Rating of at least 4.0 out of 5.0

no comment

Objective Section

Competency Section

Overall Rating

Summary

3. **Click on the check mark** next to the appropriate rating (note: the selection turns a green color. To deselect a rating click on it again). Comments can be entered and formatted. Click on **Next**.

NOTE: If a self-rating is being done, the manager will see the rating and comments (after the rating is submitted).

NEOGOV OBJECTIVE SECTION Objective Section

Employees Library

Overall Rating Not Available

Done Next >

Receive Customer Rating of at least 4.0 out of 5.0

This objective is measured by the annual survey. If employee does not get a rating of 4.0, employee will meet weekly with supervisor.

RATING SCALE * Required

Needs Improvement

Meets Expectations

High Performing

COMMENTS

Enter and format text here

Click on Next to move to the next Objective or Competency in the evaluation.

Select the appropriate rating

Enter any applicable comments

4. **Writing Assistants** are available for **competencies** only. Writing Assistants contain the Behaviorally-Anchored Rating Scales (BARS) for the competency and provide examples of behaviors that can be used to determine the appropriate rating.

COMPETENCY SECTION COMPETENCIES

Overall Rating Not Available

Done < Prev Next >

Adaptability (200)

Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effective processes, requirements or cultures.

RATING SCALE * Rating is required

Needs Improvement

Meets Expectations

High Performing

COMMENTS

Journal Entries 5 entries

Writing Assistant 3 entries

Journal Entries are available to add to the rating comments.

Click Add to Comments Box to use the Writing Assistant language.

5. Once the BARS statements have been entered into the rating, they can be edited and formatted
6. Previously entered **Journal Entries** are also available within the rating card to use in the comments section of objectives and competencies.

- An **Overall** rating is required for the evaluation (plan). To complete the **Overall Rating**, click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click it again). Comments can be entered and formatted. Click on **Done** when finished.

NOTE: If a self-rating is being done, the manager can see the selected ratings and comments.

The screenshot displays the 'Overall Rating' interface. On the left, a sidebar lists sections: Objective Section, Competency Section, Overall Rating, and Summary. The 'Overall Rating' section is active, showing a 'RATING SCALE' with three radio button options: 'Needs Improvement', 'Meets Expectations' (which is selected and highlighted in green), and 'High Performing'. A 'COMMENTS' section is located to the right of the rating scale, featuring a text input field and a rich text editor toolbar. A 'Done' button is positioned in the top right corner of the form area. Two callout boxes are present: one pointing to the 'Meets Expectations' option with the text 'Select the Rating.', and another pointing to the comments input field with the text 'Enter text.'

- The system automatically saves the work.
- Review the Summary page. Click **Submit Evaluation** when done with the rating. Click **Print Current State** if you would like to maintain a hard copy.


The screenshot shows the 'Summary' page of the evaluation process. The top navigation bar includes 'NEOGOV', 'Perform', a search bar, and the user's name 'MCSC EMPLOYEE'. The left sidebar shows the 'Summary' section selected. The main content area is titled 'Job Aids' and displays a summary of the evaluation. It includes sections for 'OBJECTIVE SECTION | STANDARD 3 POINT SCALE' and 'COMPETENCY SECTION | STANDARD 3 POINT SCALE'. The 'Objective Section' shows a rating of 'Meets Expectations' and a comment input field. The 'Competency Section' lists three items: 'Adaptability (200)', 'Building Strategic Working Relationships (200)', and 'Building Trust (200)', all with 'Meets Expectations' ratings and 'no comment' entries. A green 'Submit Evaluation' button is located in the top right corner, with a callout box pointing to it that says 'Click on Submit Evaluation'. A 'Print Current State' button is also visible.

10. If **Submit Evaluation** is selected, the system will provide a certification statement for review. If you feel changes are necessary, click **Cancel**. If changes are not necessary, click **Continue**.

<p>You're almost done!</p> <p>Are you sure you wish to submit the review at this time? Selecting OK will prevent any further changes by you or the employee. By selecting OK, I certify that this rating form constitutes my evaluation of the performance of this employee for the period covered.</p> <p><i>MCSC EMPLOYEE</i></p> <p>Do you wish to continue?</p> <p><input type="button" value="Cancel"/> <input type="button" value="Continue"/></p> <p>Click on Continue</p>	<p>You're almost done!</p> <p>Are you sure you wish to submit the review at this time? Selecting OK will prevent any further changes by you or the employee. By selecting OK, I certify that this rating form constitutes my evaluation of the performance of this employee for the period covered.</p> <p><i>MCSC MANAGER</i></p> <p>Do you wish to continue?</p> <p><input type="button" value="Cancel"/> <input type="button" value="Continue"/></p> <p>Click on Continue</p>
---	--

11. After selecting **Continue**, a confirmation will appear indicating the rating has been submitted. The review/rating is now complete.

Success!



Your evaluation for **MCSC EMPLOYEE** has been submitted.

12. Please note that the system has a language checker in it, and if you try and submit a rating that contains inappropriate language, the system will alert you and provide you with an opportunity to make changes before certifying and submitting.

13. For Managers, once finished with a rating there are two options to rate another employee:

Option 1:

Click on **NEOGOV** to return to your dashboard.

Option 2:

Click on **Employees** and search/select the employee to be rated, which takes you to their **Employee Details** screen.

NEO GOV PE Perform

Search

MCSC MANAGER

Employees Library Trainings Reports

Employee List

Show All Employees

Photo Lz Position Sta Onlr Active

Search for and select the employee to be rated.

Photo	Lz	Position	Sta	Onlr	Active
<input type="checkbox"/>	123789	MANAGER MCSC	PE-HUMAN RESOURCES MANAGER	06/22/2002	Activated Yes
<input type="checkbox"/>	456321	EMPLOYEE MCSC MCSC MANAGER	PE-Human Resources Analyst	05/07/2006	Activated Yes

Items per page 10 1 - 3 of 3 items

Acknowledgement of Rating

1. When you log in, you will arrive at your **Dashboard**. Because you have a rating that is ready for signature you will see a signature task listed in the **My Tasks** section. Click on the subject, **Sign** which will take you to the **Signature** window.

NEO GOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

My Tasks [view all](#)

1 Total 0 Rating 0 Approve & Sign 1 Sign 0 Approve 0 Other 0 Overdue

Click on Sign... link to go to the signature window

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	12/31/2016

My Evaluations [view all of my evaluations](#)

Demo of Job Aids Due: Sat, Dec 31, 2016 Status: Approval	Enhancements Demo 4-26-16 Due: Sat, Dec 31, 2016 Status: Completed	Job Aids Due: Thu, Dec 31, 2015 Status: Draft
---	---	--

2. In the **Evaluation Review (After Ratings)** window, review the ratings assigned to each objective and competency in the performance evaluation (plan) by clicking on the associated section.

NEOGOV PE Perform Search MCSC EMPLOYEE

Employees Library

After Ratings

MCSC EMPLOYEE
PE-Human Resources Analyst

EVALUATION NAME: **Job Aids**

DUE DATE: **Sat. Dec. 31, 2016**

Click on Sign

Rating Summary

Overall Rating	
MCSC EMPLOYEE PE-Human Resources Analyst	Overall Rating Meets Expectations
MCSC MANAGER PE-HUMAN RESOURCES MANAGER	Overall Rating Meets Expectations

Objective Section

Competency Section

Overall Rating

Select the section to view

COMPETENCY SECTION | STANDARD 3 POINT SCALE

Competency Section

Adaptability (200)
Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements or cultures.

MCSC EMPLOYEE	Meets Expectations
MCSC MANAGER	Meets Expectations

Building Strategic Working Relationships (200)
Identifying opportunities and taking action to build strategic relationships between one's area and other areas, teams, departments, units, or organizations to help achieve business goals.

MCSC EMPLOYEE	Meets Expectations
MCSC MANAGER	Meets Expectations

- Avoids or refuses to work with other workgroups.
- Avoids building job-related relationships.
- Fails to work cooperatively with others.

3. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge the rating by clicking on **Submit**.

NEOGOV PE Perform Search MCSC EMPLOYEE

Employees Library

After Ratings

MCSC EMPLOYEE
PE-Human Resources Analyst

EVALUATION NAME: **Job Aids**

DUE DATE: **Sat. Dec. 31, 2016**

Rating Summary

Overall Rating	
MCSC EMPLOYEE PE-Human Resources Analyst	Overall Rating Meets Expectations
MCSC MANAGER PE-HUMAN RESOURCES MANAGER	Overall Rating Meets Expectations

Sign Cancel Submit

Comments

Write comment here...

Click on Submit

Please sign your name below

Are you sure you wish to sign the review at this time? By selecting OK, I certify that I have had the opportunity to review this rating. I understand that my certification does not necessarily mean that I agree with the rating.

MCSC EMPLOYEE

MCSC EMPLOYEE July 26, 2016

[Auto-Generate](#) [Draw Signature](#)

NOTE: Clicking on **Cancel** will return you to your dashboard without acknowledging the performance evaluation (plan) rating. If you do not acknowledge your performance evaluation (plan) rating, please follow up with your manager.

- The **Request for Signature** will no longer appear on your **Dashboard**.

The screenshot shows the NEOGOV Perform interface. The user is identified as 'MCSC EMPLOYEE' and 'PE-HUMAN RESOURCES ANALYST'. The 'My Tasks' section displays a table with the following data:

Subject	Due Date	Related to	Actions
Rating For MCSC EMPLOYEE's Demo with Self...	12/17/2015	Evaluation MCSC EMPLOYEE	☆

Reports

The **reports dashboard** is available to the Manager. The reports provide the opportunity to monitor employee and evaluation specific items throughout the rating period.

- Log in and from the **Dashboard** select the **Reports** menu option and click on **Reports**.

The screenshot shows the NEOGOV Perform interface with the 'Reports' menu option highlighted. A callout bubble points to the 'Reports' menu item with the text 'Click on Reports'.

NOTE: All of the reports listed have the same general configuration and field choices; however, they are specific to the title listed. For purposes of this document, I will select the **Task Status Report** to go over the fields and their functions.

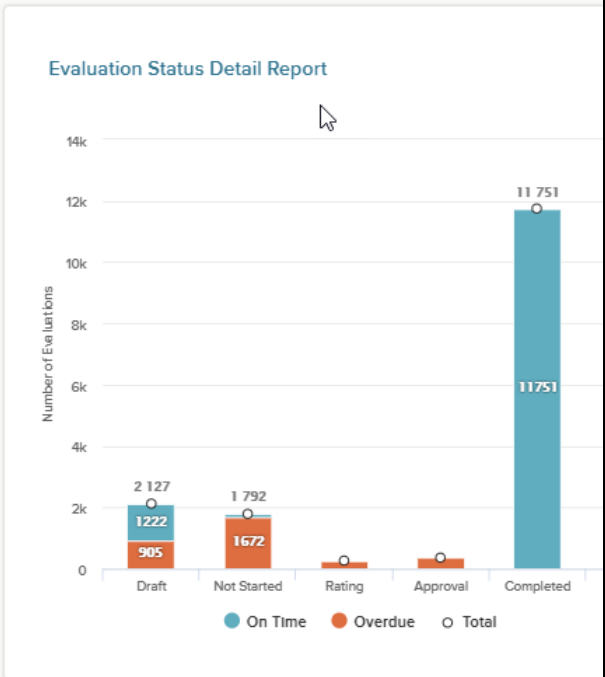
The screenshot shows the 'Reports Dashboard' with the following metrics:

- Completed Evaluations: 1% (21) CURRENT YEAR
- Completed Rating Tasks: 2% (29) CURRENT YEAR
- Completed Approval Tasks: 3% (60) CURRENT YEAR
- Created/Shared Journals: 16 CREATED, 10 SHARED
- Employees Without Evaluation: 1568 No Evaluations, 56587 Evaluations

Reports

- Evaluation Status By Department Report**
Aggregated status of all active evaluations summarized by Department
- Evaluation Status Detail**
Detailed status of all active evaluations
- Performance Rating**
Overall performance ratings for selected evaluations.
- Objective Status**
Status of Objectives by Department.
- Objective Status by Employee**
Status of Objectives by employee.
- Item Ratings**
Individual ratings, used to identify strengths and weaknesses.
- Task Status**
Summary of Tasks and their Status
- Approval Status**
Approval Status for all approvals

1 - 8 of 8 Items



- Select your report and then Scroll down to the section where you can select and arrange the fields you would like displayed on your custom report.
- Select the icon with three (column) lines on it to choose the columns to display.

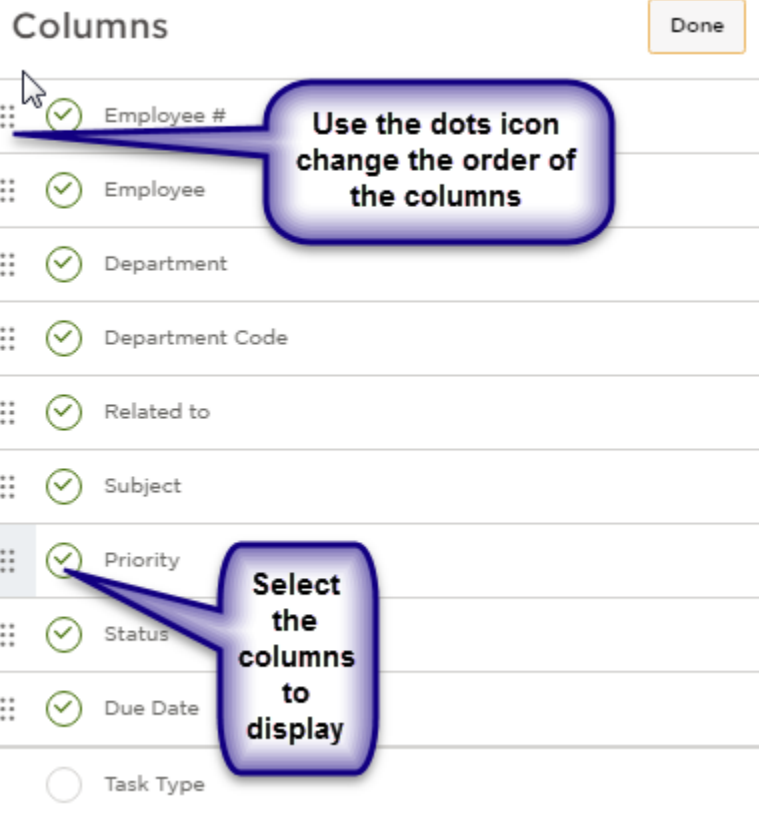
Default Bulk Actions

Select the columns to display

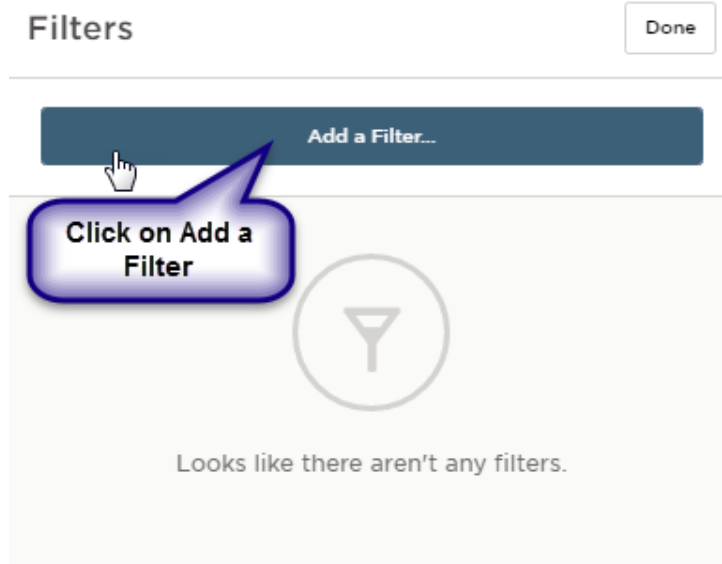
Employee #	Employee	Department	Department Code	Related to	Subject	Status	Due Date
326574	HR USER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Rating For MCSC MANAGER's Job Aids...	Low Pending	12/31/ 2019
123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Sign Job Aids-3 for MCSC MANAGER	Low Pending	12/31/ 2019
326574	HR USER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-2	Rating For MCSC MANAGER's Job Aids...	Low Pending	12/31/ 2018
123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-2	Sign Job Aids-2 for MCSC MANAGER	Low Pending	12/31/ 2018
123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Rating For MCSC EMPLOYEE's Job Aids...	Low Pending	12/31/ 2018
456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Sign Job Aids-3 for MCSC EMPLOYEE	Low Pending	12/31/ 2018
123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation 1901 MCSC Group 2 Jan 1-D...	Rating For MARK PUNG's 1901 MCSC Gr...	Low Pending	01/29/ 2018
1003712	MARK PUNG	PE-LICENSING AND REGULATORY AFF	PE-6401	Evaluation 1901 MCSC Group 2 Jan 1-D...	Sign 1901 MCSC Group 2 Jan 1-Dec 31, 2...	Low Pending	01/29/ 2018
208008	MICHAEL WINTERS	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Jan-Dec 2017	Rating For BRANDYE HUNT's Jan-Dec 2...	Low Pending	12/31/ 2017
182692	BRANDYE HUNT	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Jan-Dec 2017	Sign Jan-Dec 2017 for BRANDYE HUNT	Low Pending	12/31/ 2017

Items per page 10 1 - 10 of 477 items

- In the **Columns** fly out window, **select** the columns to display by clicking on the **name**. When a **green check mark** appears next to the column name, the column will display in the report. To **deselect** a column, click on the name. Use the **6 dots icon** to **drag and drop** the columns to the desired order/placement. When finished, click on **Done**.



5. Use the **Filter** icon to add any applicable filters to the report.
6. On the **Filters** screen, click on **Add a Filter**.



7. Select the item to **Filter** on. Then add the **Operation** to take place and any **Specific Criteria**. Click on **Apply Filter**. If additional filters are desired, repeat the steps. When all filters are in place, click on **Done**.

Filters

Done

Done

Add a Filter...

Clear All X

Due Date

between...

12/01/2017

to

12/31/2017

Apply Filter

Select the item to filter on

Select the operation

Enter the criteria

Click on Apply Filter

8. The search icon can also be used to filter by typing the criteria into the search box.

Default Bulk Actions

Search boxes

Search Icon

Employee #	Employee	Department	Status	Subject	Related to	Due Date
	PE-CIVIL SERVICE COMMISSION	PE-1901	Pending	Rating For	Jan-Dec 2...	12/31/2017
	PE-CIVIL SERVICE COMMISSION	PE-1901	Pending	Sign Jan-Dec 2017 For		12/31/2017
326574	HR USER	PE-CIVIL SERVICE COMMISSION	Pending	Rating For MCSC MANAGER's Job Aids	Job Aids	12/31/2017
123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	Pending	Sign Job Aids for MCSC MANAGER	Job Aids	12/31/2017

9. When your report criteria are set you have the opportunity to **export** your report to PDF, Excel, or CSV format by selecting the records you'd like to export and clicking on **Bulk Actions**. Choose the **Export** option and click on **Done**.

NEOGOV PE Perform

Employees Performance Evaluations Library Trainings Reports

Task Status Report

Number of Tasks

Task Type

On Time Overdue Total

Click on Bulk Actions

Actions

EXPORT ACTIONS

Export to PDF

Export to Excel

Export to CSV

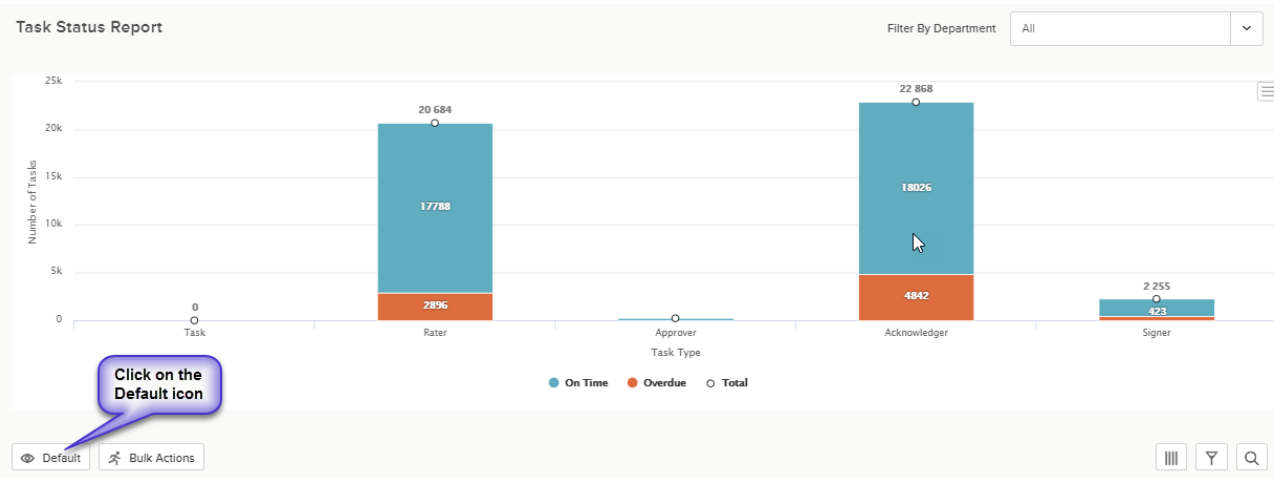
Click on Done

Choose the Export Option

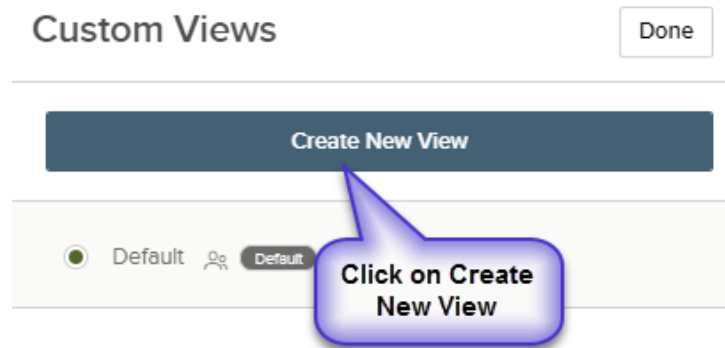
4 records are selected.

Employee # Employee Department Department Status Subject

10. The ability to create a **custom view** within the report is available to users. To create a custom view, click on **Default**.



11. In the Custom Views slide out window, click on **Create New View**.



12. Enter a **Name** for the view. The ability to schedule an **auto-export** of the report is available by selecting **Schedule Export** and completing the required fields.

Custom Views

Cancel

Save

Click on
Save

* Fields are required.

Name *

Custom View for Job Aid

Enter a
Name for
the View

Make my default

Who can view this?

Only Me

Everyone

Schedule an
Export of the
report

SCHEDULE EXPORT

Active



Send to *

Search employee

Report type

CSV



Frequency

Daily



Repeat every *

1

Day(s)

Send report starting on

 05/23/2018

End sending report on

 05/24/2018

13. Click on **Save**.

14. To return to your **Dashboard** click on **NEOGOV**.