NEOGOV

NEOGOV Perform – Employee/Manager User Guide

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.
- Evaluations (Plans) have been assigned.

Helpful Tips:

- Performance plans can also be called evaluation plans.
- Clicking on the Dashboard icon in the upper left-hand corner always returns a user to their dashboard.
- Clicking on a task from the Unified Dashboard directs the user to the product to complete the task.

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NEOGOV

LOGIN

NEOGOV can be accessed by using the following link: https://login.neogov.com/ or via the HR Gateway on the Civil Service Commission website.

The browser that works best with NEOGOV is Google Chrome.

chrome

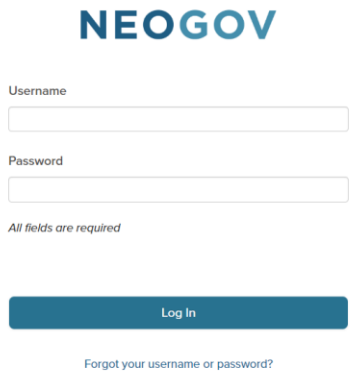
1. **Account Activation**
   A. You should have received an **Activate Your NEOGOV User Account** email with a link to create your account **Password** using your email address as your **Username**. This activation will expire after 24 hours. If you require a new activation, please contact your HR Office or the NEOGOV mailbox at MCSC-NEOGOV@michigan.gov.

   NOTE: Current NEOGOV users will use their existing username and password.

   B. Click on the **Log In** >> button.

2. **Forgot Password**

   A. To reset your password, click the **Forgot your username or password** link below the login button.



   B. Enter your **email address** and click on **Send Email**. A message will be sent containing your username and a link to reset your password.

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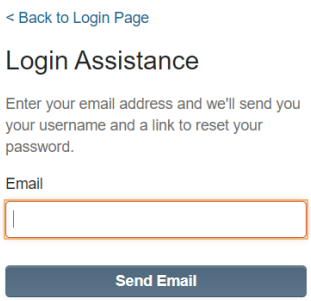


Dashboard

The Unified Dashboard serves as your personal homepage in NEOGOV. It contains a section for assigned tasks and icons/links to employee performance evaluations. It contains the below sections:

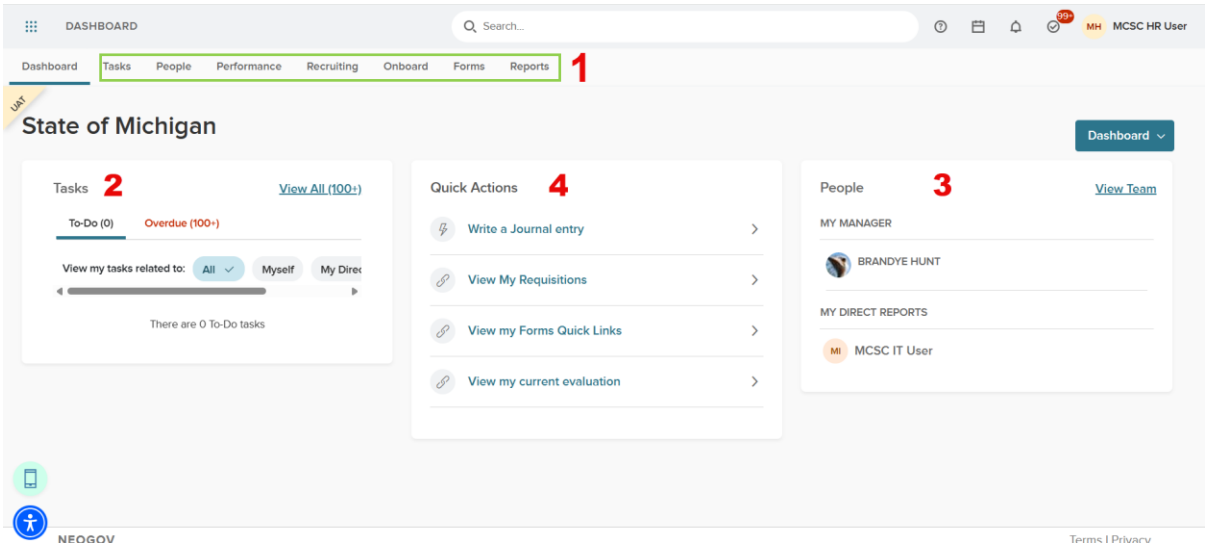
1. **A sub menu section** for the NEOGOV product areas.

2. **My Tasks**-May display up to 5 tasks spanning all NEOGOV products based on due date, with the earliest displaying first.

3. **People**-Displays your manager and any direct reports (if applicable). Security is hierarchy-driven so you can only see other employees below you in the organizational structure.

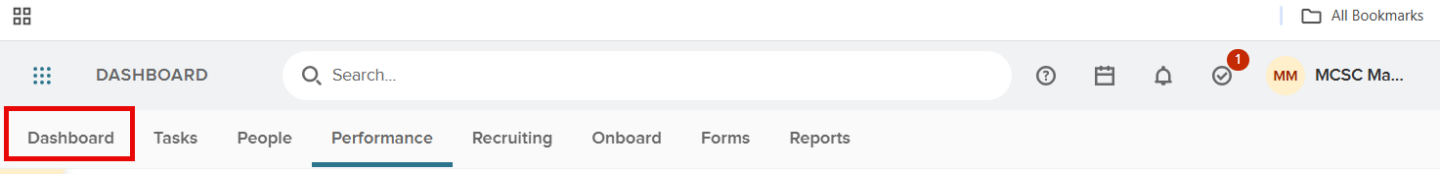
4. **Quick Actions**-Displays quick links to common actions across the different product lines.

    A. **Journal Entries** can be created from the Quick Actions section.



Regardless of where you are in NEOGOV, you can always return to your Unified Dashboard by

clicking on **Dashboard** in the upper left corner of your screen.

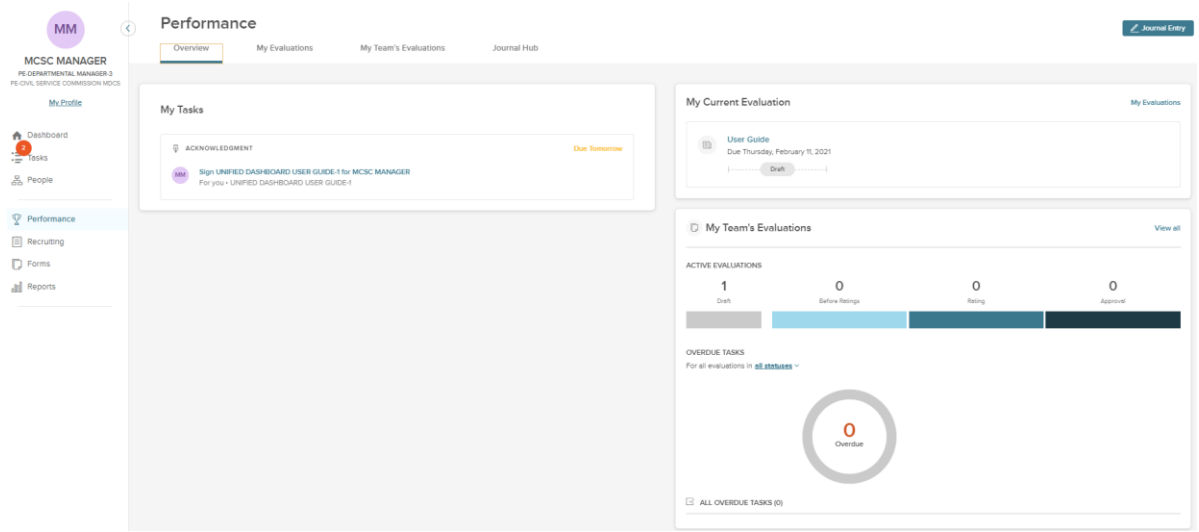


The **sub menu** of the Unified Dashboard contains a **Performance Tab**.

1. The **Overview** tab displays **My Tasks** (specific to NEOGOV Perform), **My Current Evaluation**, and **My Team's Evaluations** (for managers only).

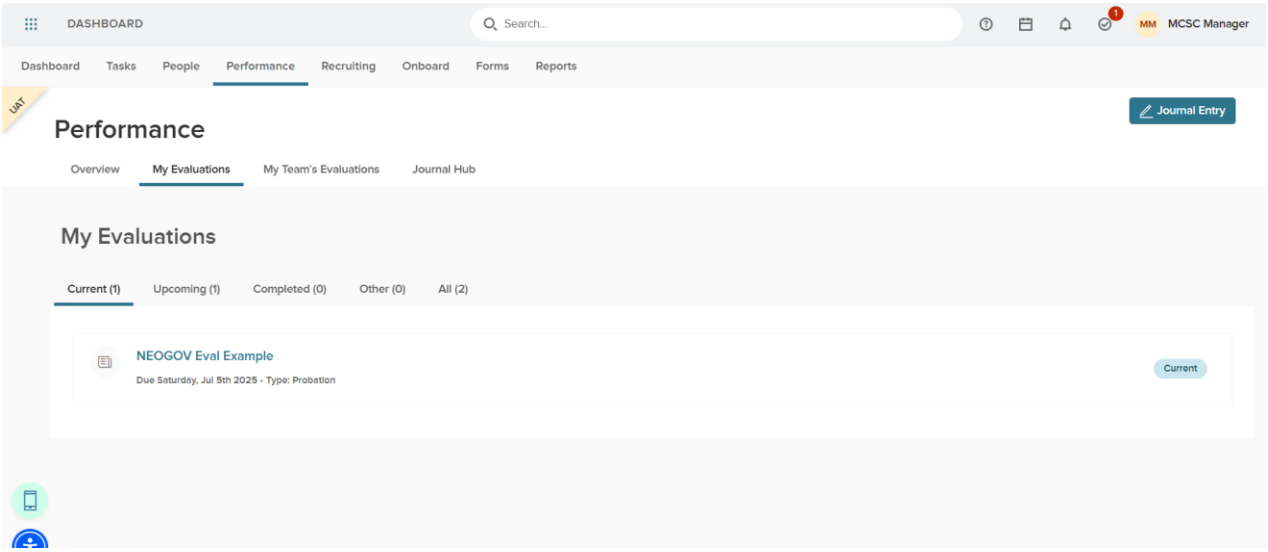
   NOTE: Clicking on a **Task** will take you into **NEOGOV Perform** to complete the task.

   NOTE: Journal Entries can be created from any of the Performance tabs using the **Journal Entry button** in the upper right corner.



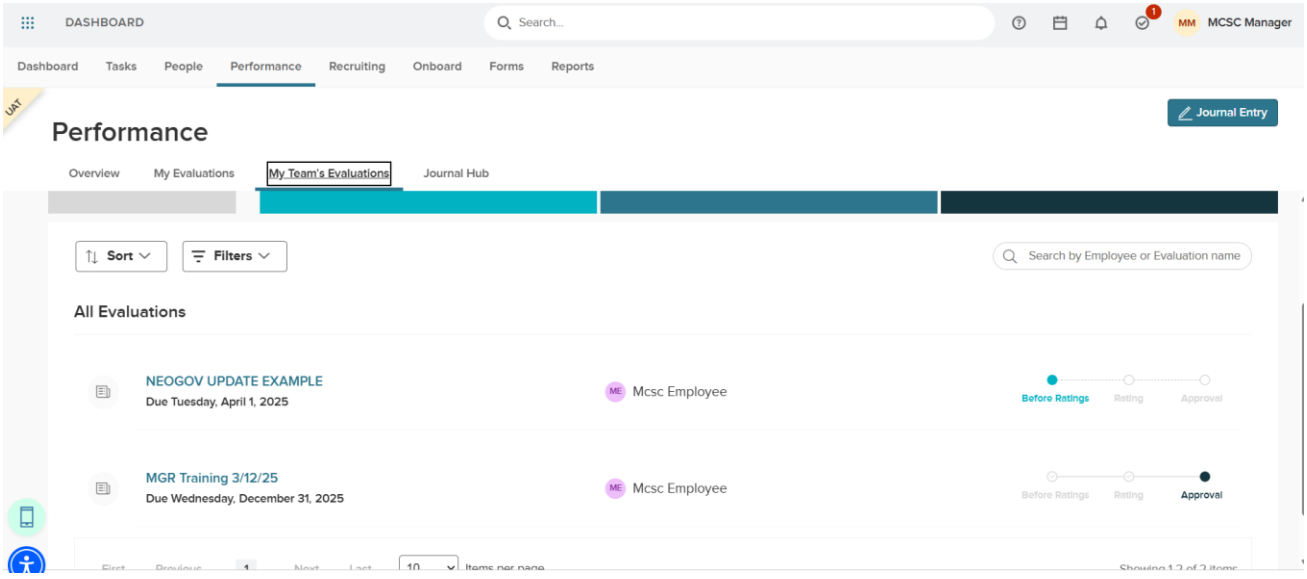
2. **My Evaluations**-Displays evaluations assigned to you. You can filter on **Active, Completed, Archived,** and **Canceled** evaluations.

   NOTE: Clicking on an **Evaluation** name will take you to the specific evaluation in **NEOGOV Perform** to view it and/or complete any associated tasks.



3. **My Team's Evaluations** (Managers only)-Displays the evaluations for employees in your hierarchy. This includes: **Draft, Before Ratings, Rating,** and **Approval** statuses and can be filtered by employee.

   NOTE: Clicking on an **Evaluation** name will take you to the specific evaluation in **NEOGOV Perform** to view it and/or complete any associated tasks.



4. **Journal Hub**-Displays your **Current**, **Pending**, and **Draft** journal entries. These can be sorted by **Create Date Newest First, Create Date Oldest First, Update Date Newest First,** and **Update Date Oldest First.**

   Reminder: To create a new Journal Entry, click on the blue Journal Entry button in the upper right hand corner of the screen.

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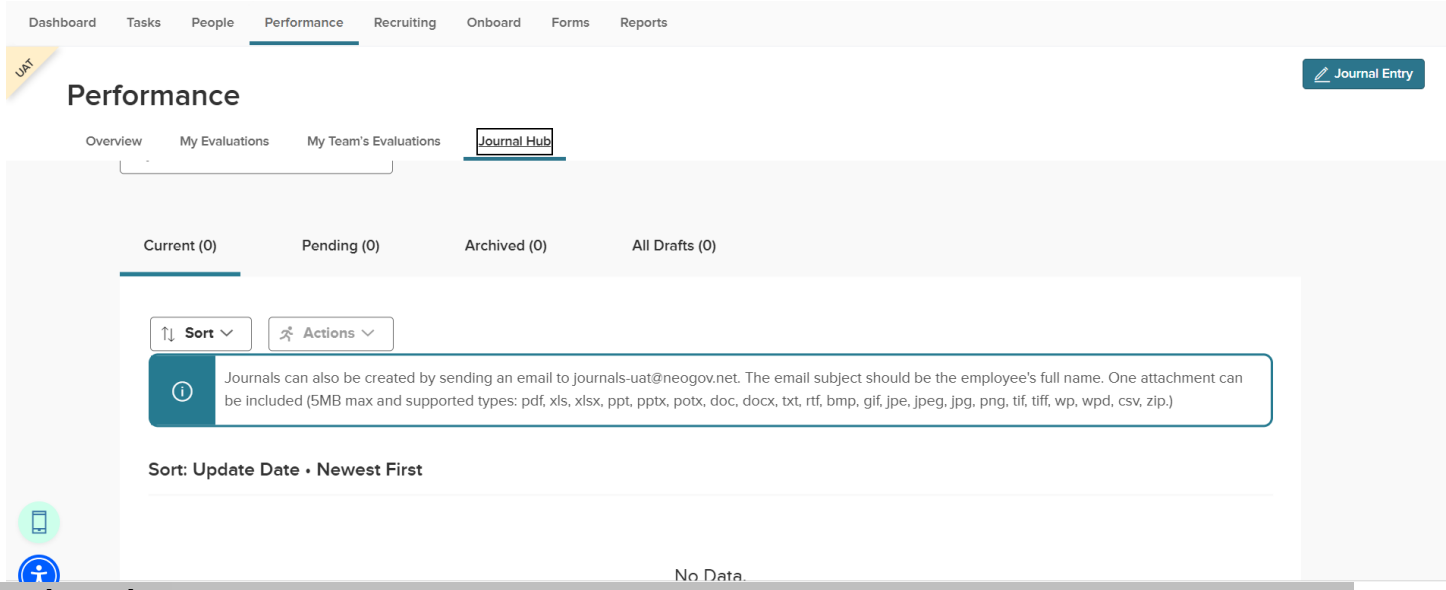


Journal Entries

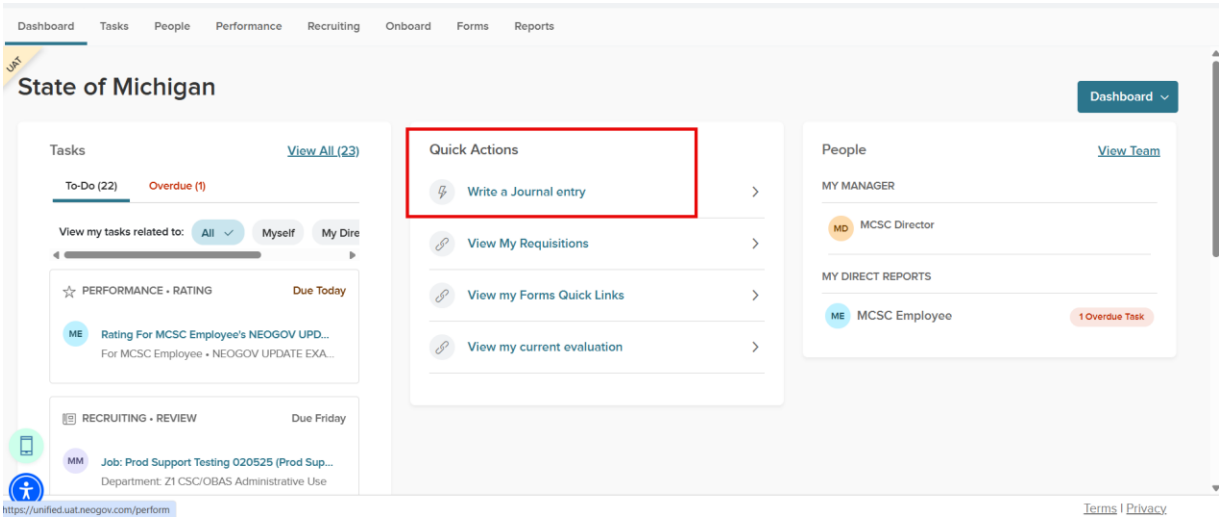
Journal entries are a helpful tool to foster and encourage communication between managers and direct reports in NEOGOV Perform. From the **Unified Dashboard**, journal entries can be entered from the **Dashboard tab, Performance tab, or from My Profile** and are available to the rater(s) during a performance 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 with feature.
- Objectives and competencies can be tagged in the text of a journal entry which allows for filtering within the rating card.
- Journal entries can be edited, printed, deleted, or archived by the creator only.

1. After logging in, you will be at your **Dashboard**.
2. As an **employee**, to enter a journal entry for **yourself** you have three options:

   Option 1: From the **Dashboard** tab, under **Quick Actions**, click on **Write a Journal entry.** This option requires the user to enter who the journal entry is about.

   Option 2: From the **Dashboard,** click on the **Performance** tab. Click on the **Journal Entry** button in the upper right-hand corner**.** This option requires the user to enter who the journal entry is about.

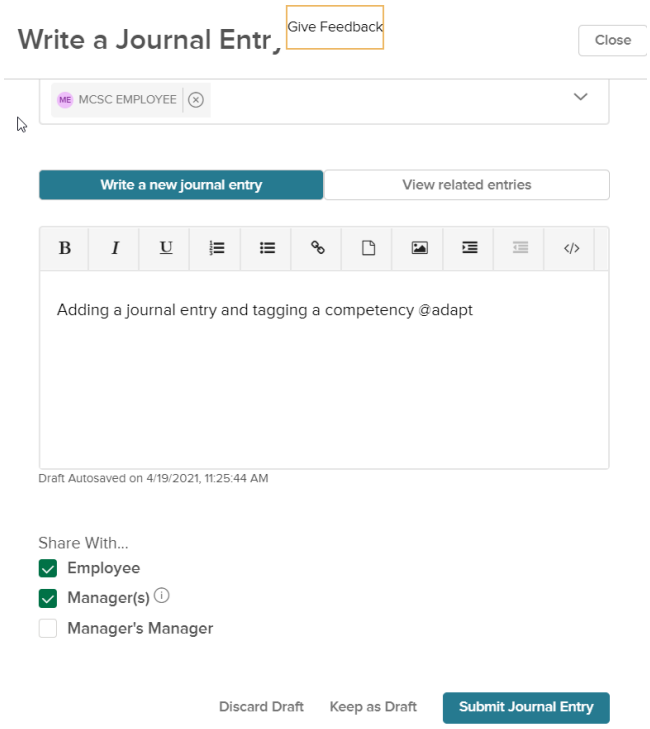


1. A slide-out window opens. **Enter who the journal entry is about, the text of the journal entry, and tag whomever the entry should be shared with**.

2. **Tagging Objectives/Competencies:** Objectives/Competencies located in existing evaluations can be tagged by typing the "@" symbol and the beginning of the objective/competency. For example, @adapt would result in adaptability being available for selection within the journal entry text.

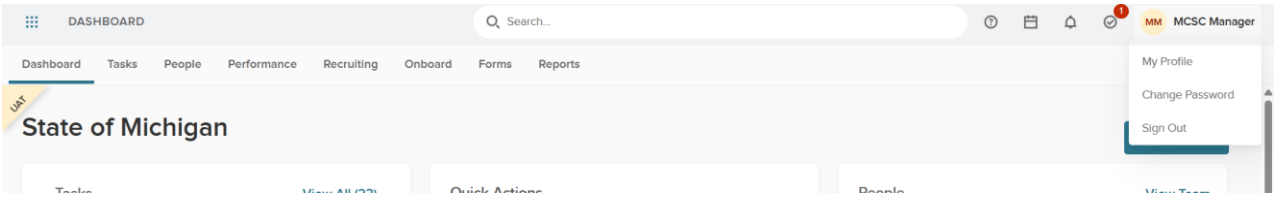
3. Click on **Submit Journal Entry** to save it. Options **to Discard the Draft** or **Keep as Draft** are also available.

   NOTE: Clicking on **View related entries** displays previously entered journal entries for the selected employee.



4. The system will remain on the **Journal Entry** page to allow for additional Journal Entries for the employee. When finished entering Journal Entries, click on the **Close** button to return to the previous page.

Option 3: Use the **drop-down arrow next to your name and click My Profile** (upper right-hand corner).



1. Under the **Actions** button, click on **Write a Journal Entry**. This option automatically **populates your name** for who the journal entry is about.

2. A slide-out window opens. **Enter the text of the journal entry, and tag whomever the entry should be shared with**.

3. Tagging Objectives/Competencies: **Objectives/Competencies** located in existingevaluations can be tagged by typing the "@" symbol and the beginning of the objective/competency. For example, **@adapt would result in adaptability** being available for selection within the journal entry text.

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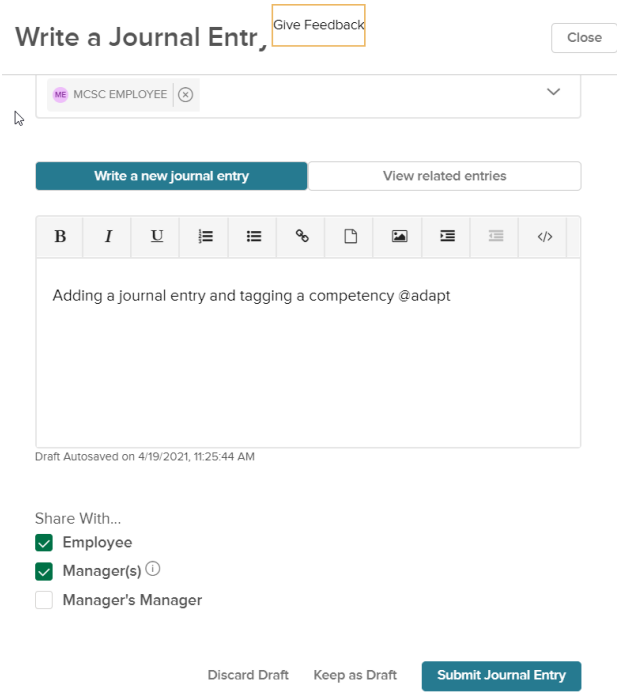

6. The system will remain on the **Journal Entry** page to allow for additional Journal Entries for the employee. When finished entering Journal Entries, click on the **Close** button to return to the previous page.

3. **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.

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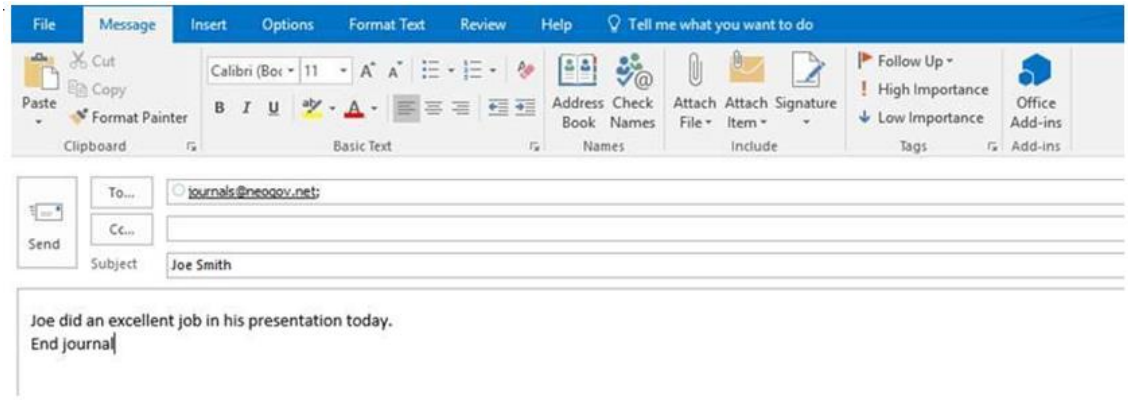


Check-Ins

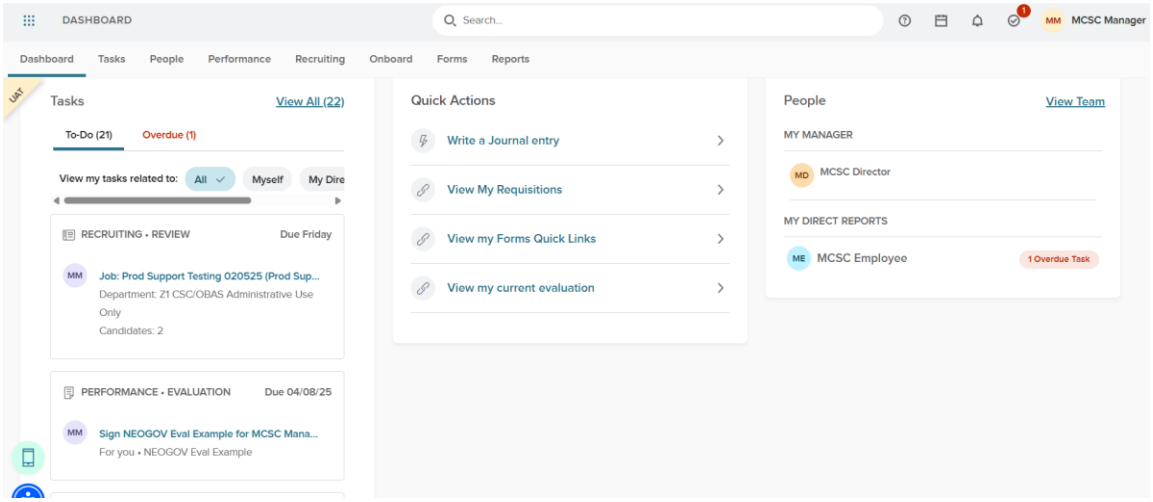
1. If a check-in task is assigned to you, when the evaluation is at that step in the process, you will receive an email regarding the task. It will also show up in the **Tasks** section of your dashboard.

   a. Wait until the task **Due Date** before completing the Check-In Task.

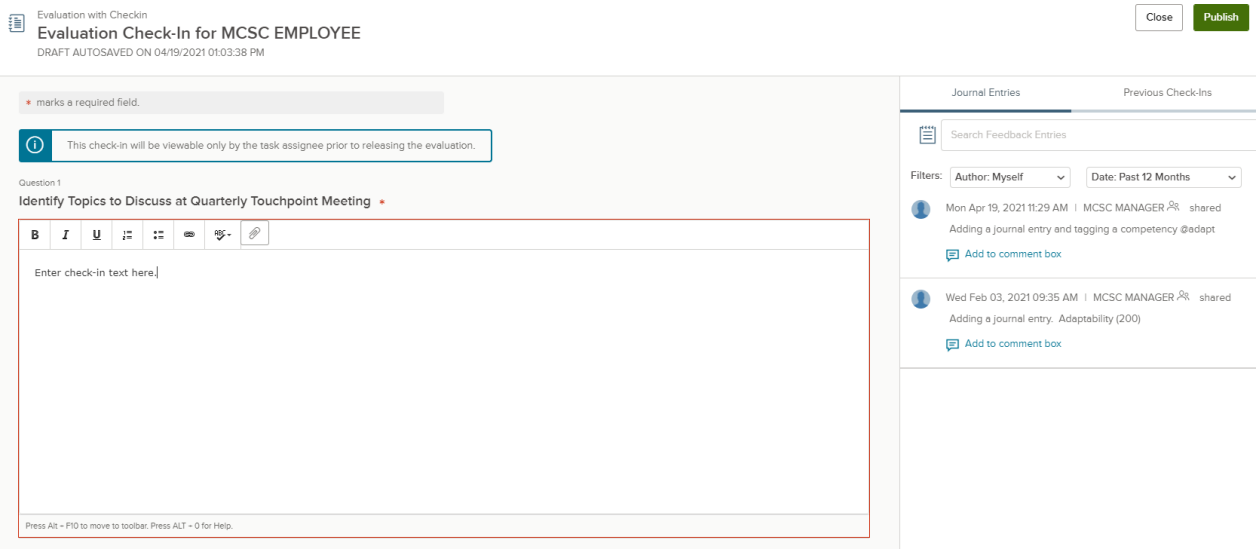
   b. If the Check-In is part of a **sequence** of tasks, as soon as the current Check-In is completed, the next Check-In task in the sequence will populate on your dashboard. It is important to verify the task Due Date before completing it. Once completed, the task **cannot be unlocked** or moved back in the process.

2. On the **Dashboard** click on the **Check-In** Task to be completed.

   NOTE the following:
   - The **Task Name** is Check-In
   - The **Employee** associated to the Check-In Task
   - The **Evaluation** that the Check-In Task is located
   - The **Due Date** of the Check-In Task



3. Click on the **Task** name, **Check-In**, to go to NEOGOV Perform and complete the task. In the **Check-In Window** answer the **required question**. Journal Entries and previously entered Check-Ins are available to add to the comments box. Click on **Publish.**



4. After clicking on **Publish**, you will be taken back to your Dashboard. The completed Check-In task will no longer appear in the Task section; however, the next Check-In sequence will be available (if applicable) with a **future due date**. **Do not complete the next Check-In until it is due**.

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, 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.

Evaluation Details Page:

1. The top of the **Evaluation Details** page lists information specific to the performance evaluation (plan) including name, due date, current status, type (periodic or probation), position, and department.

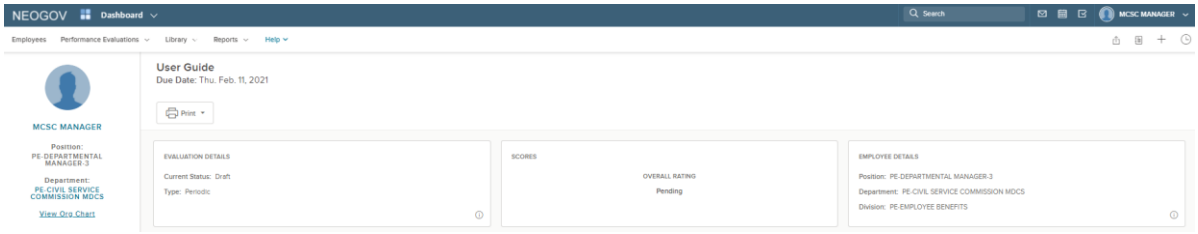
2. The performance evaluation (plan) will be in **Draft Status** upon receipt and will remain in that status until it is started by the manager. Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started the evaluation.

3. 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**.

4. The **Overall Rating** will display as Pending until the performance evaluation (plan) rating has been completed by the manager/supervisor.

5. 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.

    a. The Print button does not populate the content of the evaluation, such as rating comments for the employee, until the rating has been completed and submitted by the rater (manager/supervisor).



6. The **Evaluation Details page** will default to displaying the **Evaluation Content**.

    a. **Objectives** are the individual actions the manager/supervisor and employee agree will be rated in this performance evaluation (plan) for the 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.

i. **Add/edit/delete Objectives**: Employees/Managers can add, edit, and delete objectives until the performance evaluation (plan) is started.

1. To edit objectives after the evaluation (plan) is started, use the pause button and make the changes. Once the changes have been made, the **manager** needs to click on the **Start button** to regenerate the acknowledgement task for the employee.

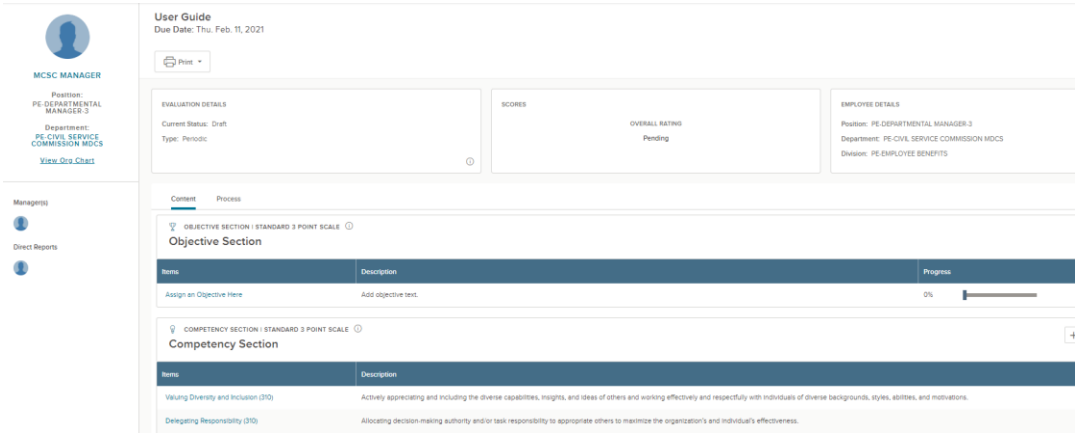
NOTE: Only the user entering the objective can edit or delete it.

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

i. **Add/edit/delete Competencies**: Employees/Managers can add, edit, and delete competencies until the performance evaluation (plan) is started.

1. To edit competencies after the evaluation (plan) is started, use the pause button and make the changes. Once the changes have been made, the **manager** needs to click on the **Start button** to regenerate the acknowledgement task for the employee.

c. Some Managers/Supervisors may solicit employee assistance in the addition of competencies. Other Managers/Supervisors may complete all the evaluation (plan) updates in Perform.



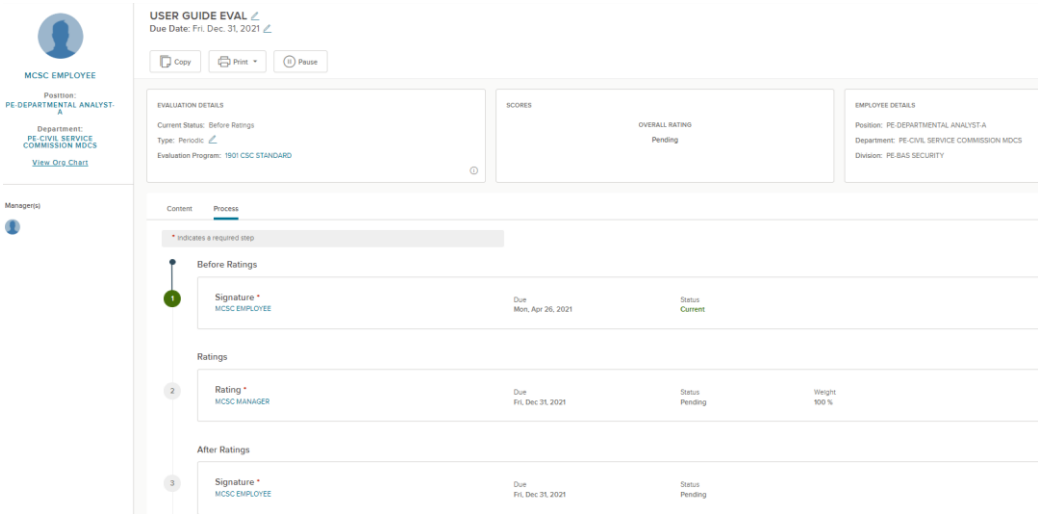
7. Notes/Attachments can be added within the evaluation with items specific to the rating period.

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.

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

a. The **Before Ratings Signature** for the employee **(Evaluation (Plan) Acknowledgement)** is 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 theperformance evaluation is **started by the manager**. How to acknowledge a performance evaluation (plan) is covered in the **Acknowledgement of Evaluation (Plan) section** of this document.



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 above is Dec 31, 2021. The manager/supervisor serves as the **Rater of Record**.

d. The **After Ratings Signature** for the employee (**Rating Acknowledgement)** is 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 Ratings section** of this document.

e. Tasks can be added to the performance evaluation (plan) and will be covered in the

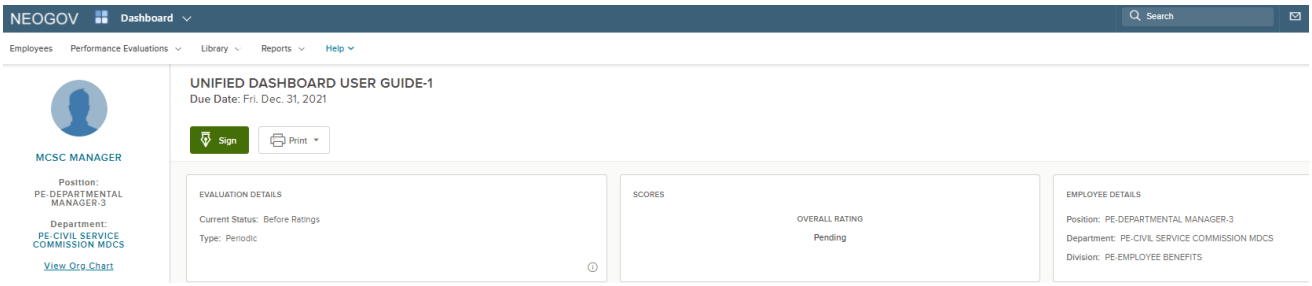
Notes/Attachments/Tasks section of this document.

9. 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/StartPerformance (Evaluation) Plan** section of this document.

10. 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 or employee self-ratings are not required, a **Rate** task and button appears for the manager indicating the evaluation (plan) is ready for rating. (A rate task/button will only populate for the employee if a self-rating is assigned to the evaluation).

11. Once ready for acknowledgement/review, the **Status** of the performance evaluation (plan) changes from **Draft** to **Before Ratings**.

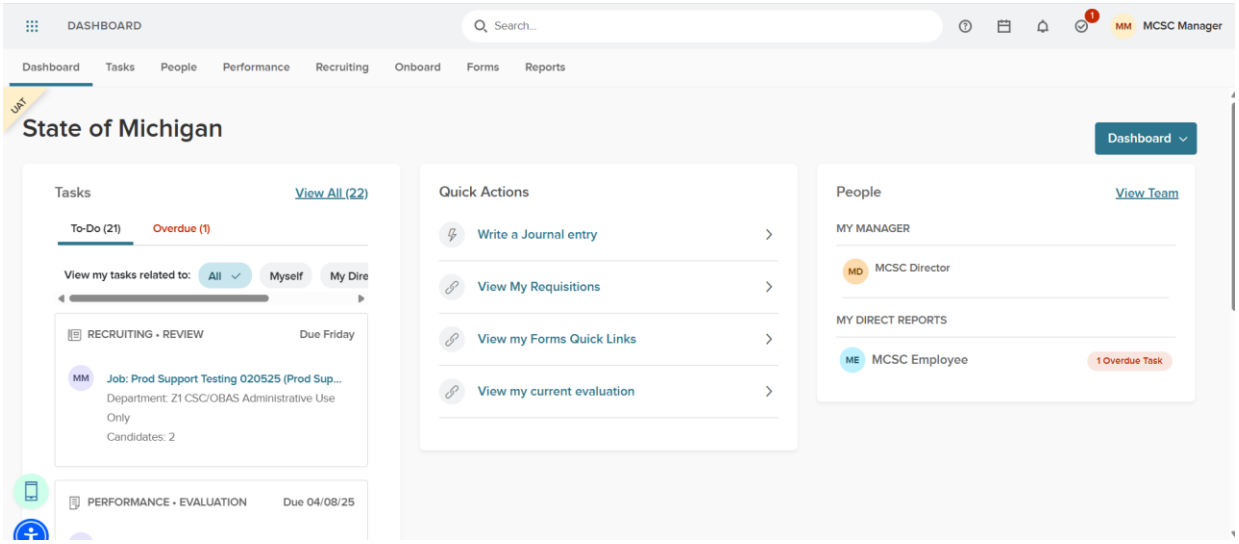
12. The performance evaluation (plan) content, such as objectives/competencies, can now be printed using the **Print** feature.



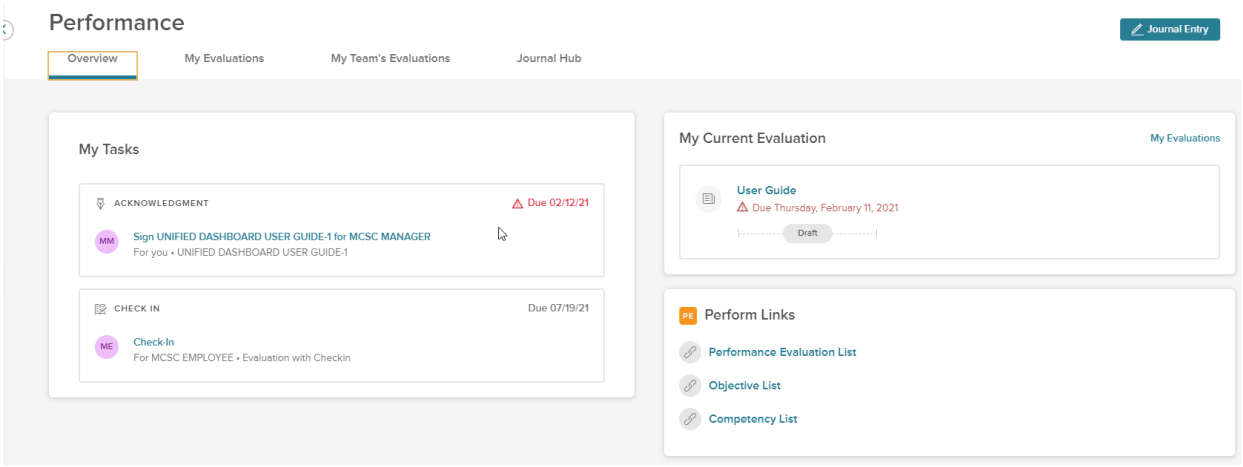
Add Content to Performance Evaluation (Plan)

After logging in, from the **Dashboard**, one of the following will apply:

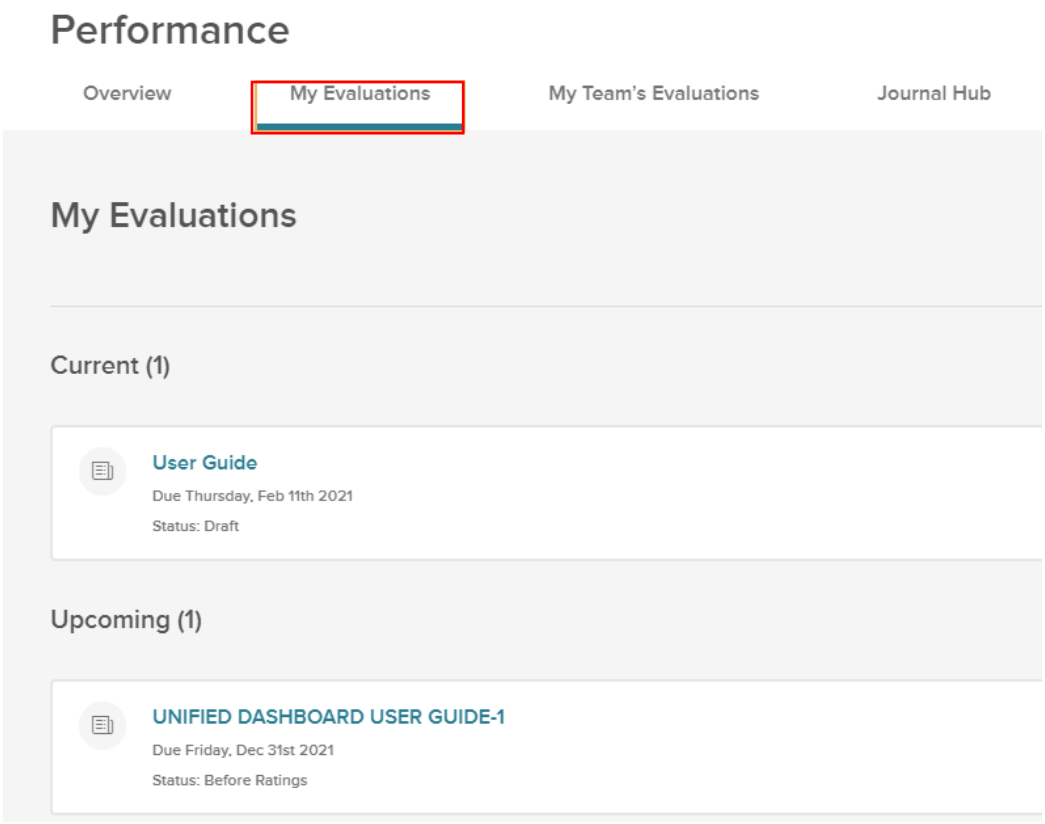
1. **Employee**—Click on the **Performance tab** from the top sub menu.



a. The **Performance** tab will open to the **Overview** menu option. On the **Overview** page, you can see your **current evaluation in the My Current Evaluation section**. This section provides the name of the evaluation, the due date, and the current status. To access the content of the evaluation, **click on the Evaluation Title**.

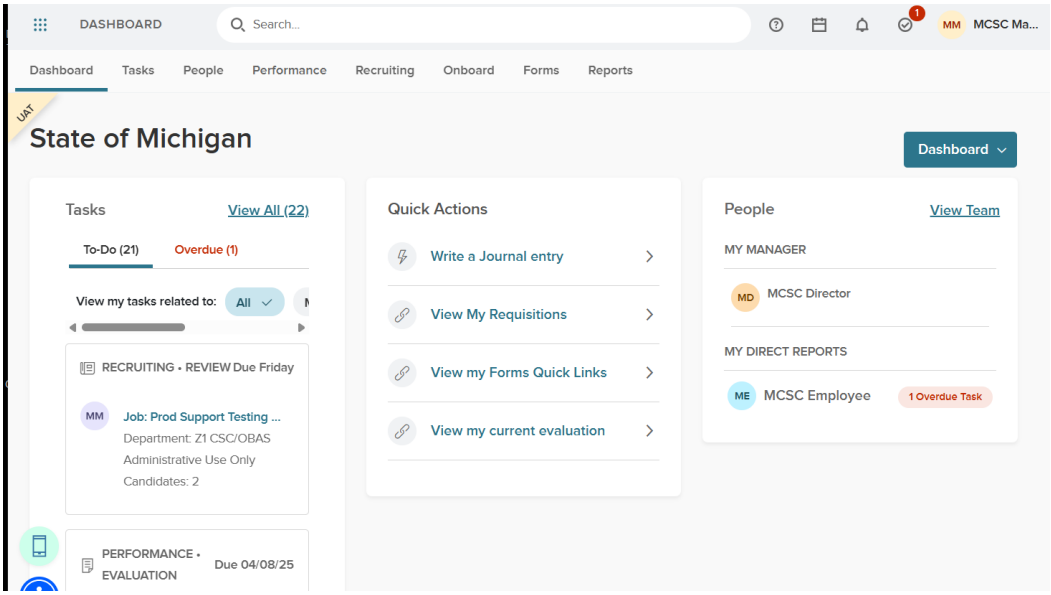


b. The **My Evaluations** link in the My Current Evaluation section of the Overview tab, and the **My Evaluations menu** tab both take you to the page that displays all your evaluations. To access the content of an evaluation, **click on the Evaluation Title**.



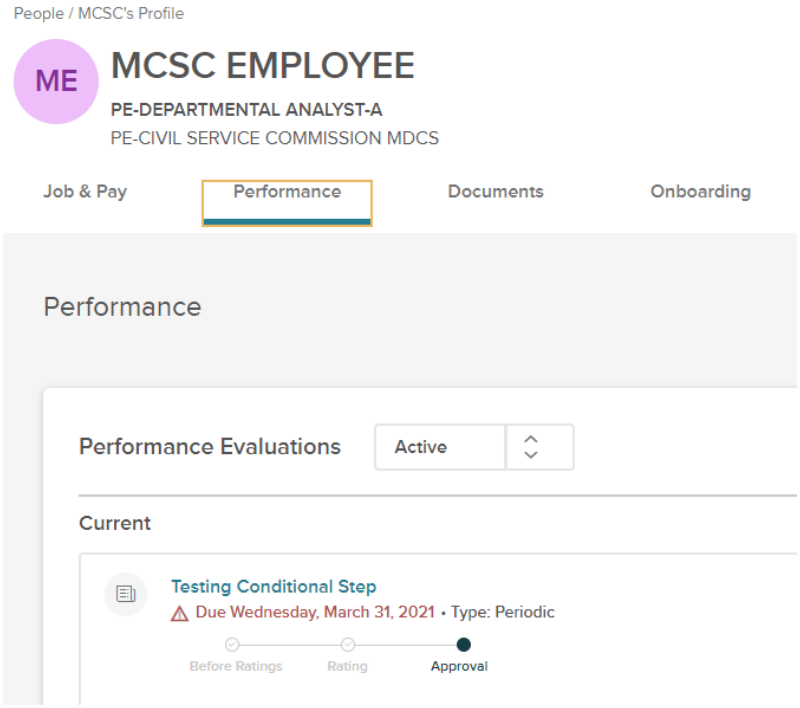
2. **Manager**-there are **Two** ways to access the evaluations of your direct reports.

   Option 1: From your **Dashboard**, in the **People** section, click on the name of the direct report whose performance evaluation (plan) you wish to view/edit/start.



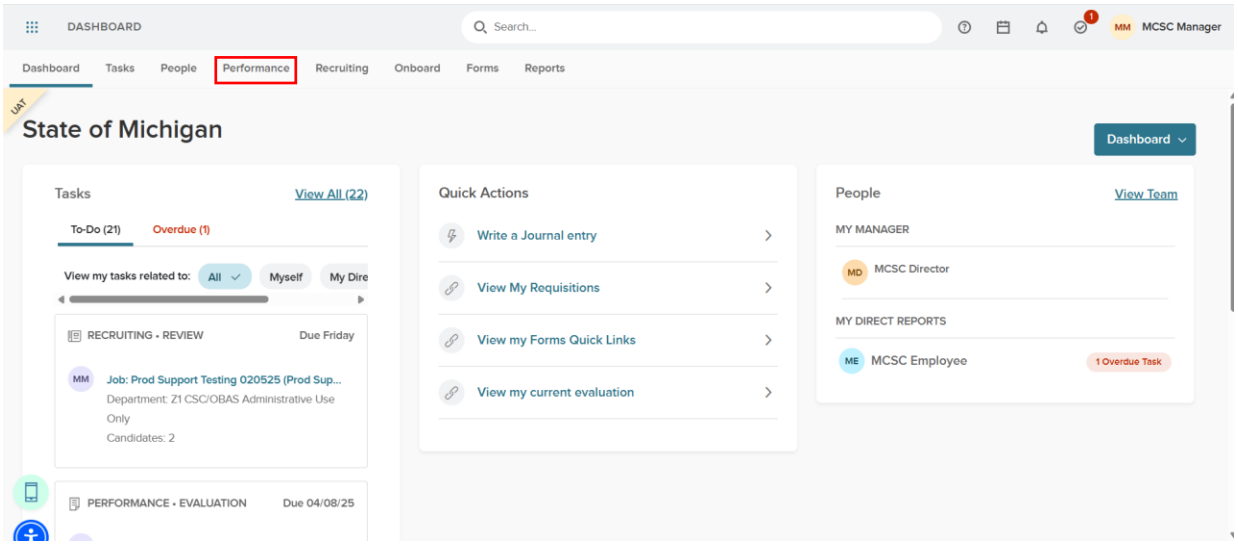
1. You will be taken to your direct report's **People/Employee Profile** (Employee Details page).

    a) Click on the **Performance** tab to see all of the employee's evaluations.



    b) Select **the Performance Evaluation** (Plan). The system will redirect you to the NEOGOV Performance product, **Evaluation Details** page. Enter the **content** (Objectives/Competencies) and then "start" it by clicking on the **Start** button.

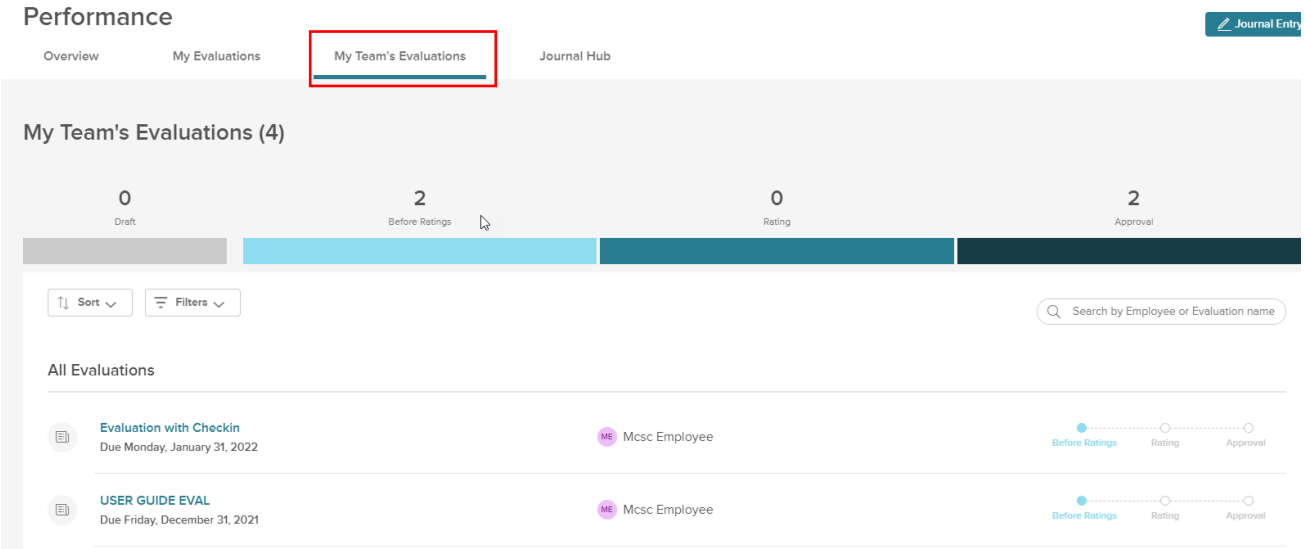
Option 2: From your **Dashboard**, click on the **Performance** tab in the **sub menu**.



2. From the **Performance** page, click on the **My Team's Evaluations** tab.

   NOTE: This page can be filtered by employee.

3. Select **the Performance Evaluation** (Plan) for the employee. The system will redirect you to the NEOGOV Performance product, **Evaluation Details** page. Enter the **content** (Objectives/Competencies) and then "start" it by clicking on the **Start** button.

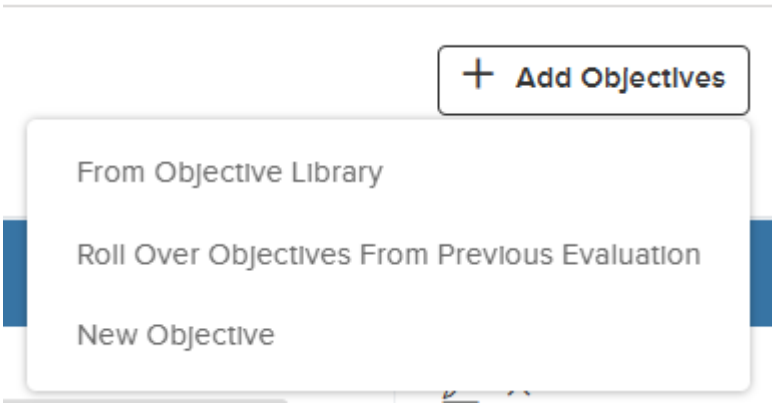


Add/Delete Objectives

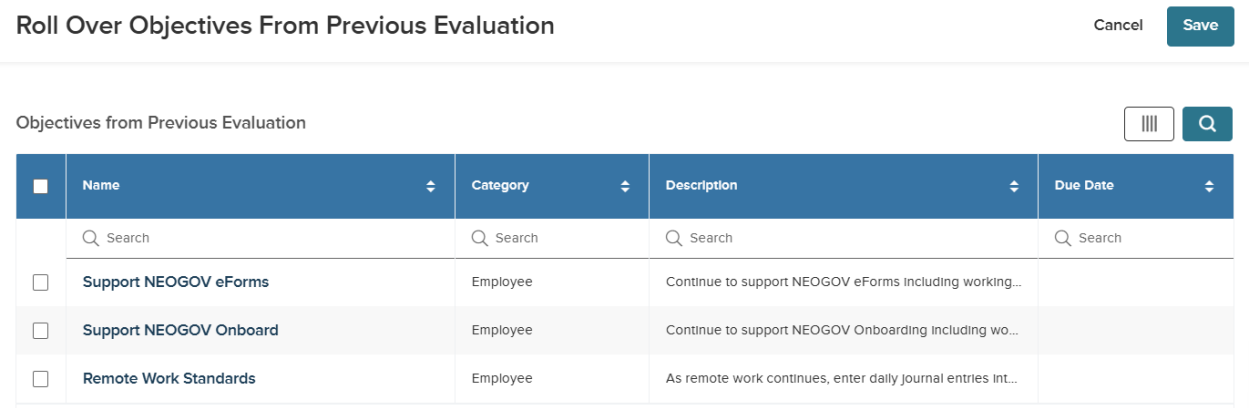
1. After selecting the specific evaluation (discussed above), on the **Evaluations Details page,** click on **Add Items** and select from the options. The options include selecting an objective

from a library, rolling over objectives used in previous evaluations, and writing a new objective.

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



2. Department strategic objectives will be available with the **From Objective Library** option. If your department is using this functionality, you will be instructed on what to select from the library.
3. The selection of the option to Roll Over Objectives from Previous Evaluation will prompt a new window to open.



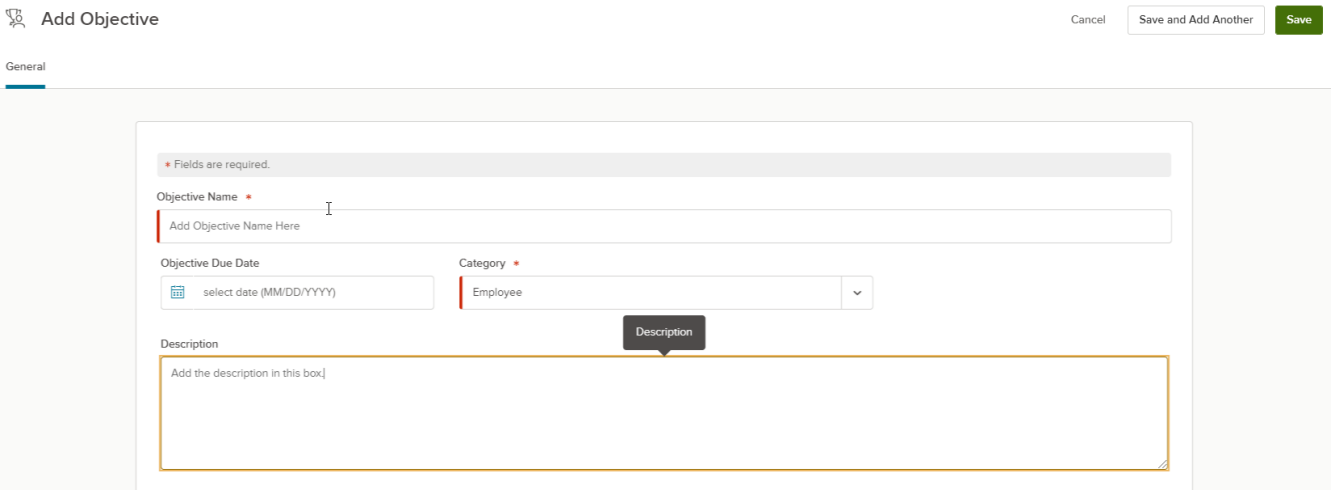
The user selects the objectives to add to the evaluation and then clicks on Save.

4. The Add New function will prompt the Add Objective slide-out window to 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 a **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.

a. Objectives are considered due on the due date of the evaluation. If a separate objective due date and related reminder settings are configured for a specific objective, the system will send emails to the employee regarding the objective.

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.



3. Click on **Save**

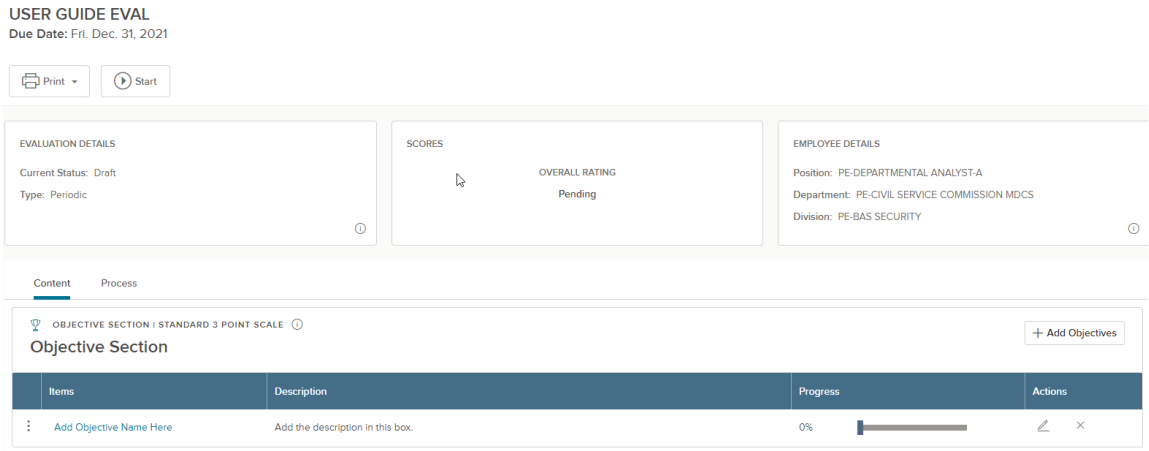
4. Repeat these steps for any additional objectives.

   NOTE: Each objective is accompanied by a **Progress** slider bar, which may be used to update the percentage completed for that objective. The progress bar is not tracked/reported on within the system. However, report options are available for this information in the Reports menu. (The slider bar appears on the **Evaluation Details page** in the Objectives section.)

5. 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).

6. 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.

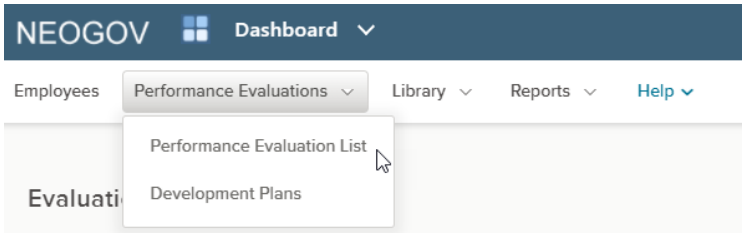


Bulk Objectives

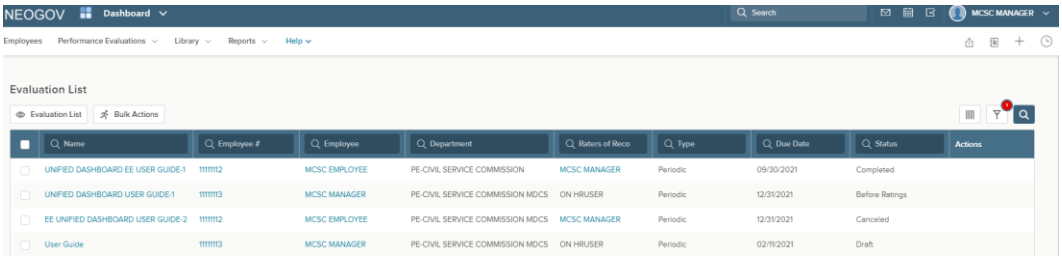
If you are a **Manager**, the ability to add an objective to multiple employees at the same time is available using a **bulk tool**.

1. Select an employee's evaluation to work on. The system will redirect you to the NEOGOV Performance product, **Evaluation Details** page.
2. In the **Performance Evaluations** menu, along the top of the page, select **Performance Evaluation List**.

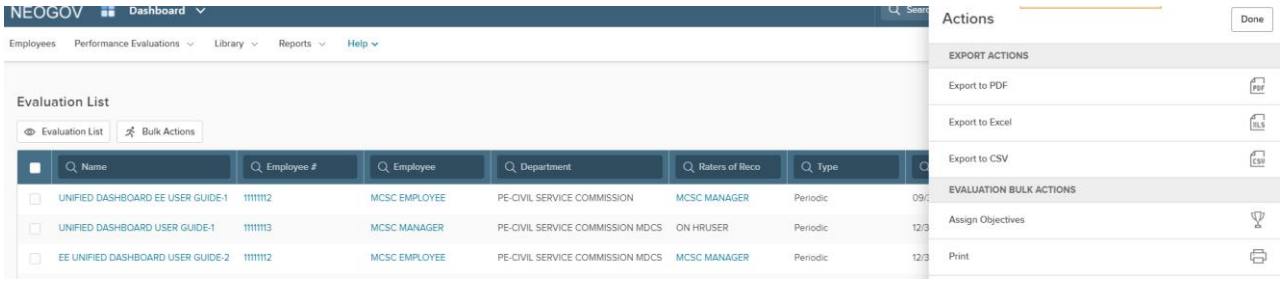
   The **Evaluation List** will populate, displaying only the employee evaluations associated to the manager.



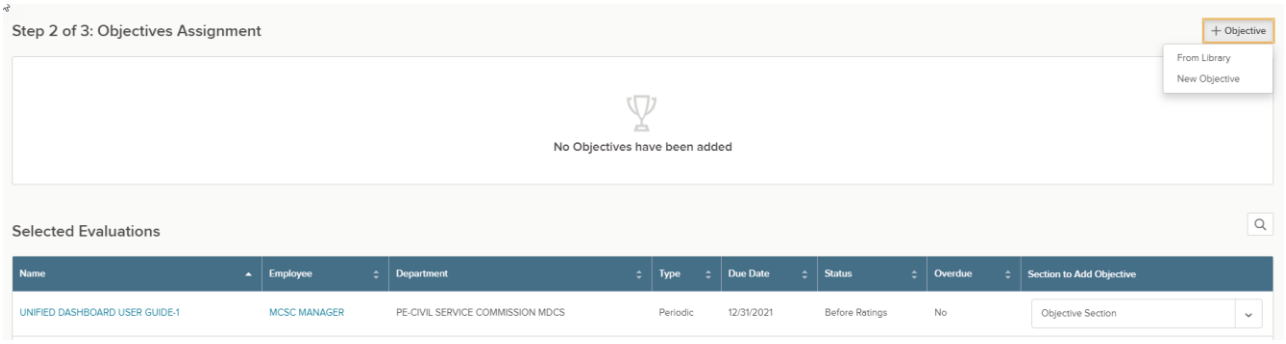
3. On the **Evaluation List**, select the employees/evaluations that will receive the objective(s). Objectives can be added to evaluations in **Draft**, **Before Ratings, and Rating** statuses only.



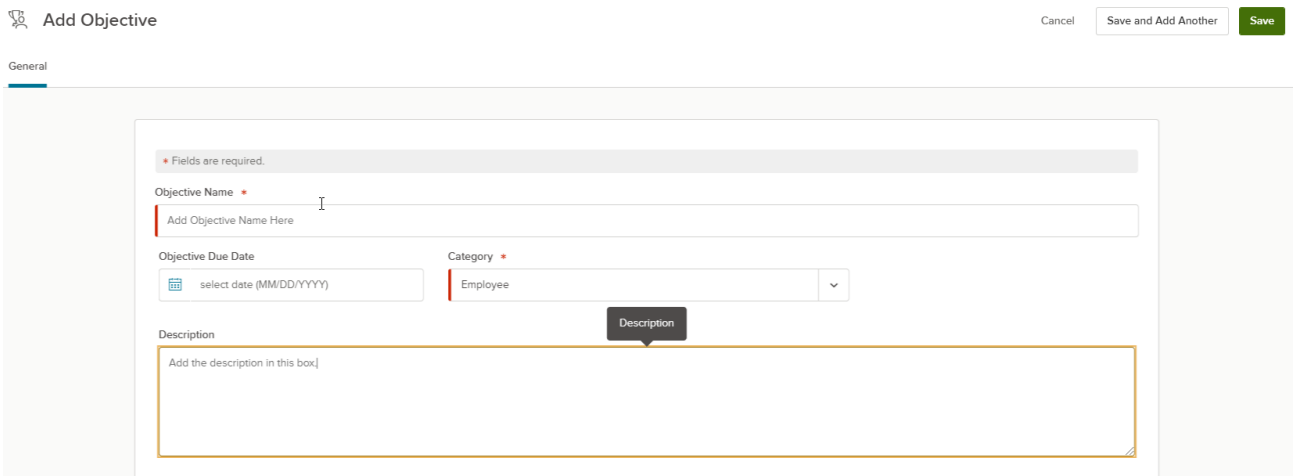
4. Click on the **Bulk Actions button**. **Select Assign Objectives** from the **Evaluation Bulk Actions** section.



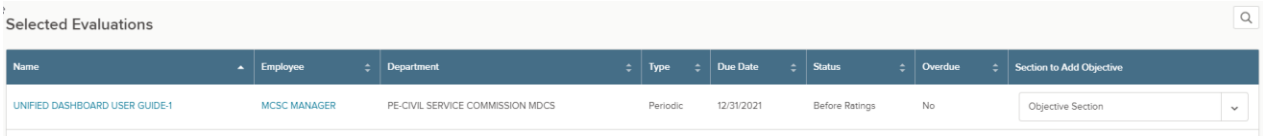
5. On the **Objectives Assignment** page, click on the **+Objective** button to add the Objective. **From Library** allows for the assignment of existing Objectives housed in the Objective Library. **New Objective** allows for the creation of a new Objective.



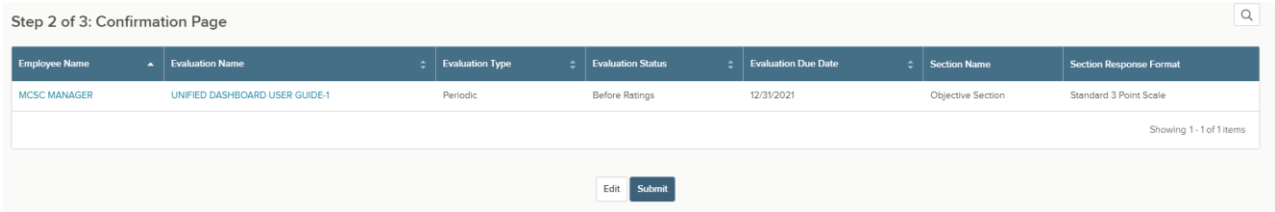
6. Enter the **Objective Name, Description**, and select a **Category** (usually Employee). When finished,
click on Save.



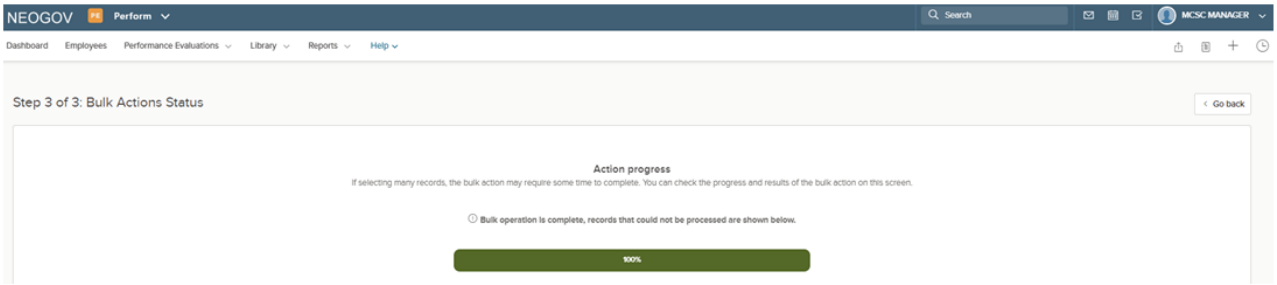
7. Enter any additional Objectives that should be added to the selected employees via the bulk action tool. When finished, select **Objective** for the section where the Objective(s) will be added within the evaluation. Click on **Next**.



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



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



Competencies

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

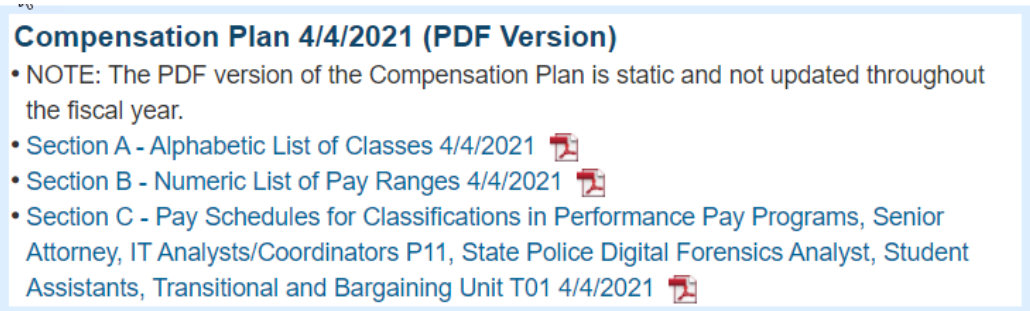
   NOTE: **From Competency Library** allows you to select the competencies to add. **FromClass Specification** adds every competency from the ECP Group to the section.

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

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 in the Important Links section.

a. **Click on Section A** in the Compensation Manual.



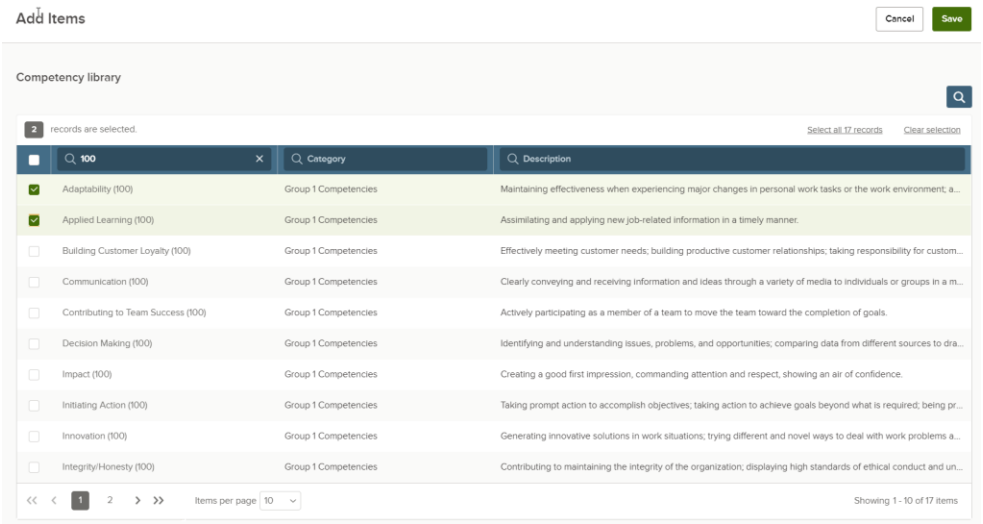
b. Locate your **HRMN Position Description** (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager and a Group 3 Supervisor); CL4 is Group 4.

HRMN Position Description	Grade	Core Pos Code	Schedule	Unit	Exempt	Salary Class	Pay Plan	Shift	Job Cat	Job Class	04/04/2021 Minimum	04/04/2021 Maximum
Departmental Analyst-E	9	DEPTALTE	NERE-174	Y99	N	H	BWN2	Y	2	CL2	$21.66	$27.20
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y23	N	H	BWN2	Y	2	CL2	$20.88	$28.74
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y99	N	H	BWN2	Y	2	CL2	$20.88	$28.74
Departmental Analyst-E	P11	DEPTALTE	NERE-174	Y23	Y	H	BWE1	Y	2	CL2	$23.27	$33.95

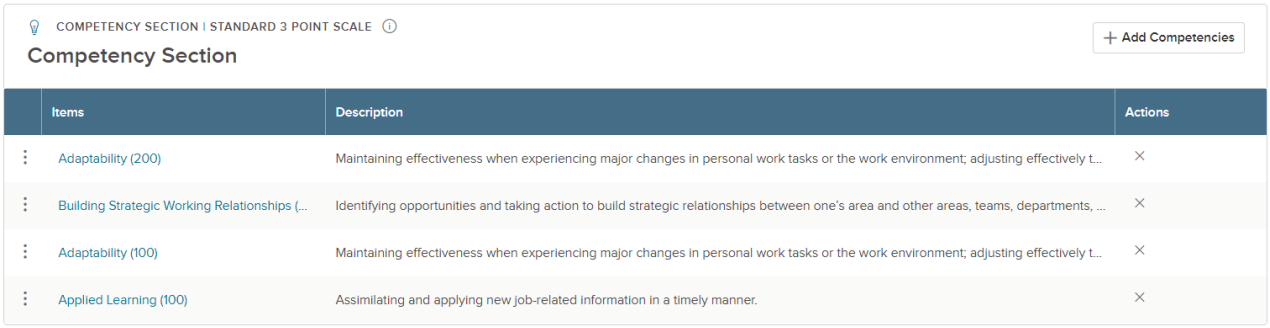
3. From the **Competency Library**, select the appropriate competency by clicking in the checkbox in front of it and selecting **Save**.

NOTE: Competencies are entered in NEOGOV Perform with (100), (200), (310), (320), or (400) afterthem. 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)

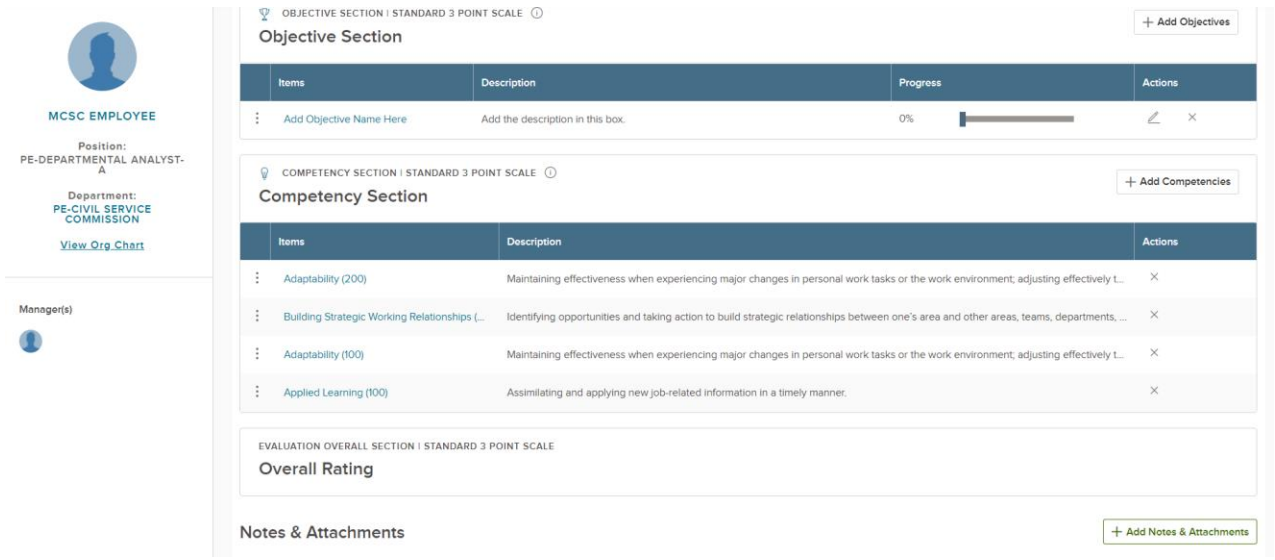


4. To **delete** a competency, click on the **“x” icon**.



Notes & Attachments

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



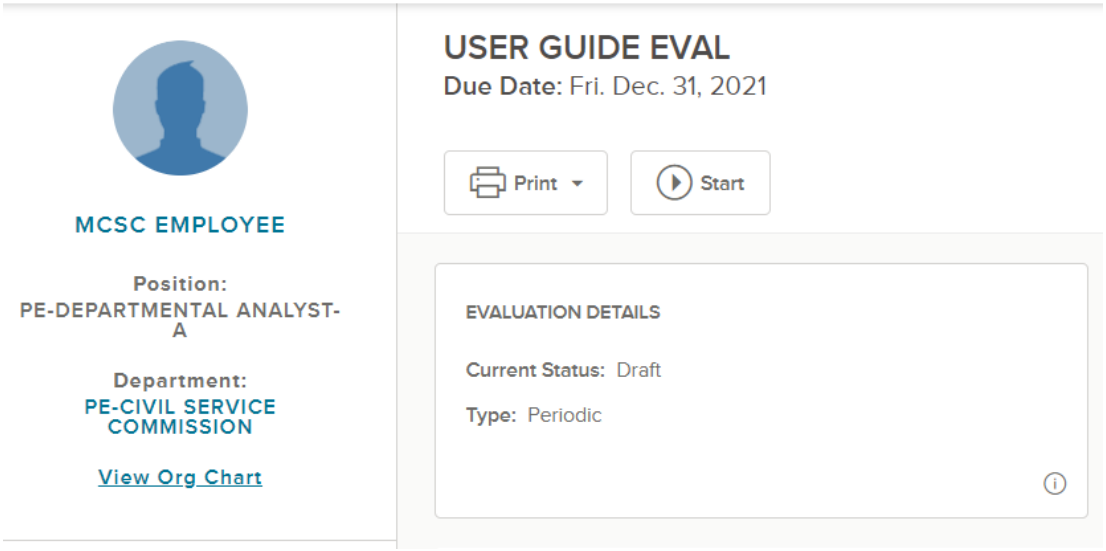
a. Notes can be typed directly. Some formatting including a spell-checking function is available. Attachments can be added by using the +**Attachment** button. If Private Note is checked, only the person entering the note can see it. Click **Save**.

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.

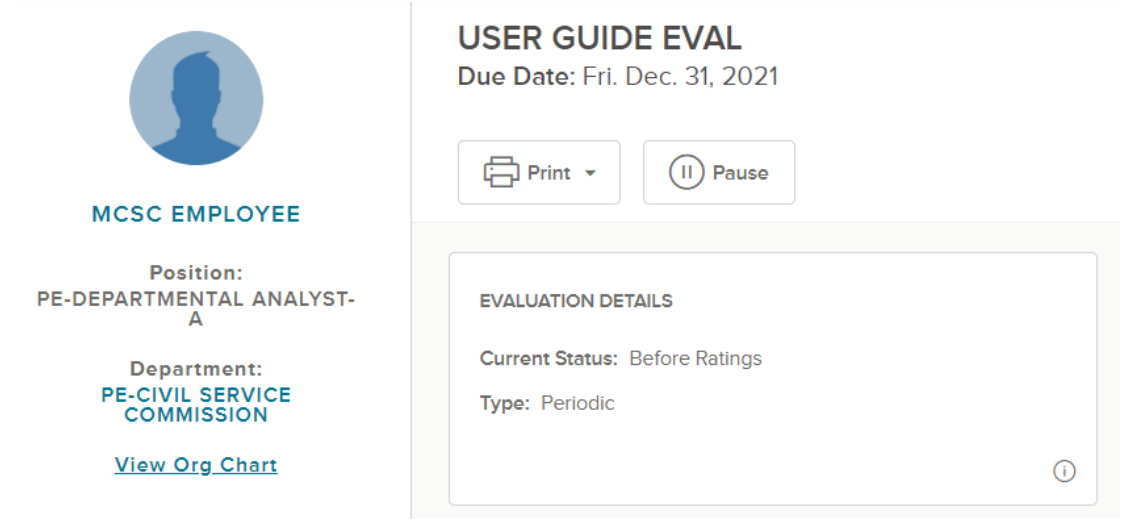
Start Evaluation

1. When the performance evaluation (plan) is ready for employee acknowledgment (certification), it can be **started** by clicking on the **Start** button. 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.



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 retriggered asking for their signature (certification)

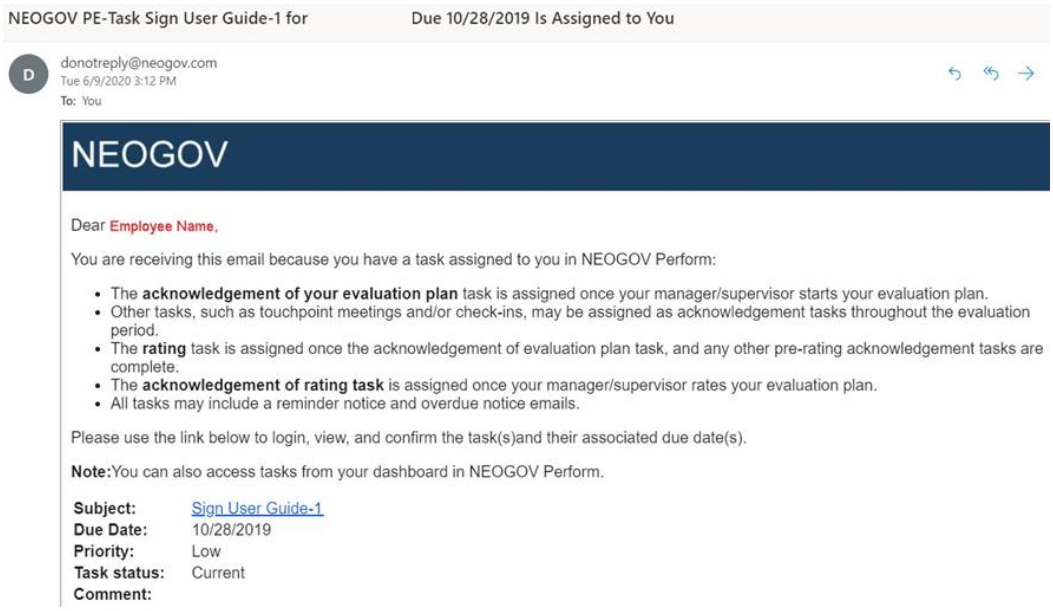


4. Once started, the **Status** of the performance evaluation (plan) changes from **Draft** to **Before Ratings.**

NEOGOV

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 PE-Task Sign User Guide-1 for Due 10/28/2019 Is Assigned to You

donotreply@neogov.com
Tue 6/9/2020 3:12 PM
To: You

NEOGOV

Dear Employee Name,

You are receiving this email because you have a task assigned to you in NEOGOV Perform:

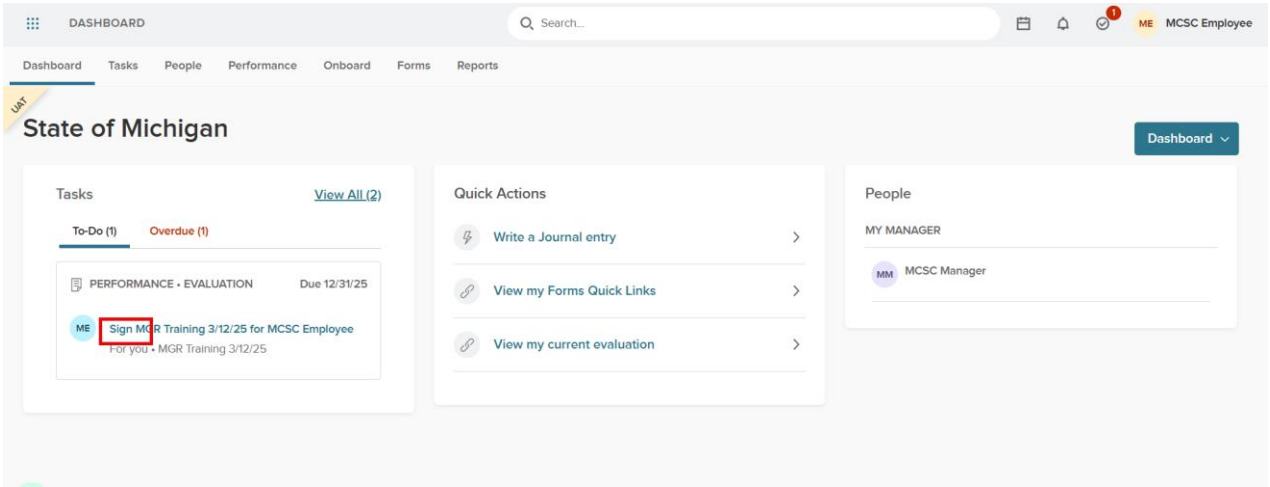
- The **acknowledgement of your evaluation plan** task is assigned once your manager/supervisor starts your evaluation plan.
- Other tasks, such as touchpoint meetings and/or check-ins, may be assigned as acknowledgement tasks throughout the evaluation period.
- The **rating** task is assigned once the acknowledgement of evaluation plan task, and any other pre-rating acknowledgement tasks are complete.
- The **acknowledgement of rating task** is assigned once your manager/supervisor rates your evaluation plan.
- All tasks may include a reminder notice and overdue notice emails.

Please use the link below to login, view, and confirm the task(s)and their associated due date(s).

Note: You can also access tasks from your dashboard in NEOGOV Perform.

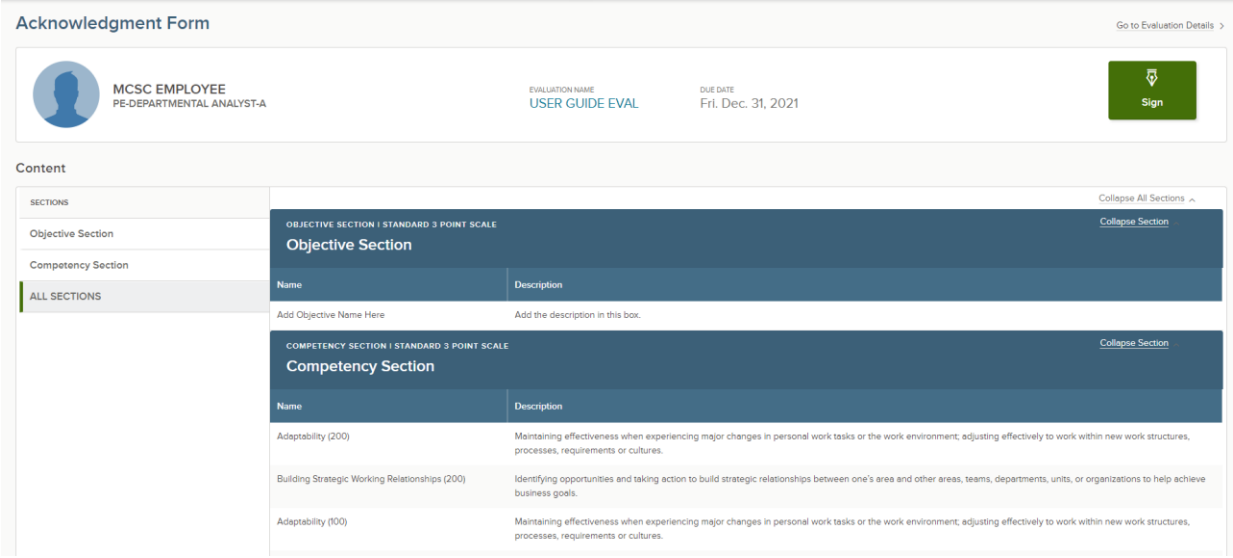
Subject: Sign User Guide-1
Due Date: 10/28/2019
Priority: Low
Task status: Current
Comment:

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 Performance product, Acknowledgement window.



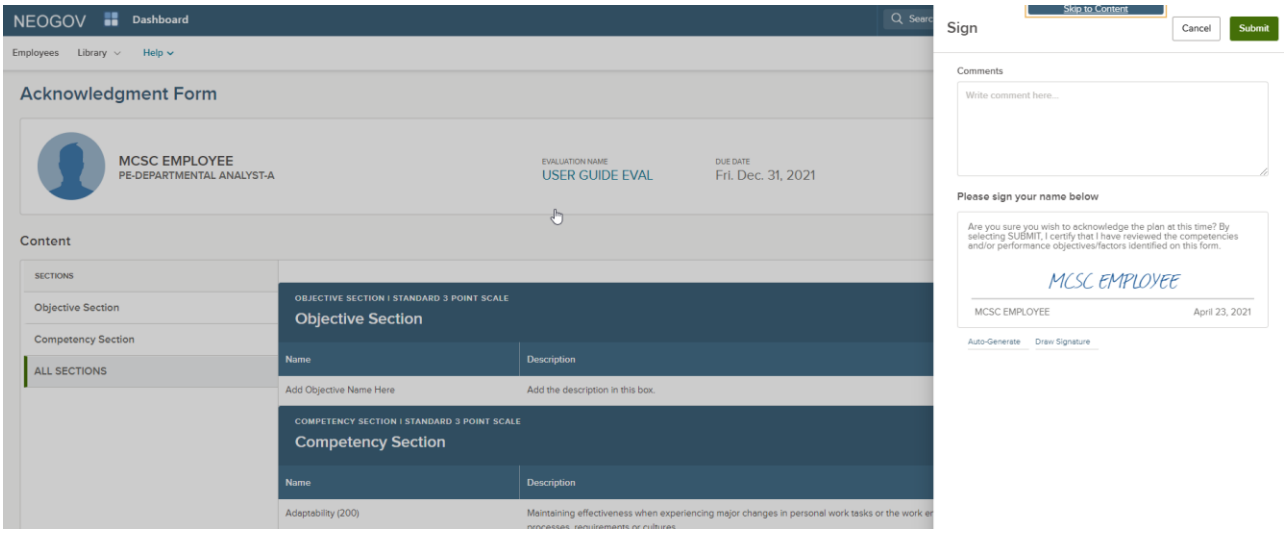
3. In the **Evaluation Acknowledgement (Before Ratings)** window, review the assigned performanceevaluation content. To see only objectives or only competencies click on the specific section.

   a. If questions or concerns need to be addressed before completing the acknowledgement task,return to your dashboard by clicking on **NEOGOV** or **Dashboard**. The task will remain activeand in your Tasks section of the dashboard. If you do not acknowledge your evaluation (plan), please follow up with your manager.



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.



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

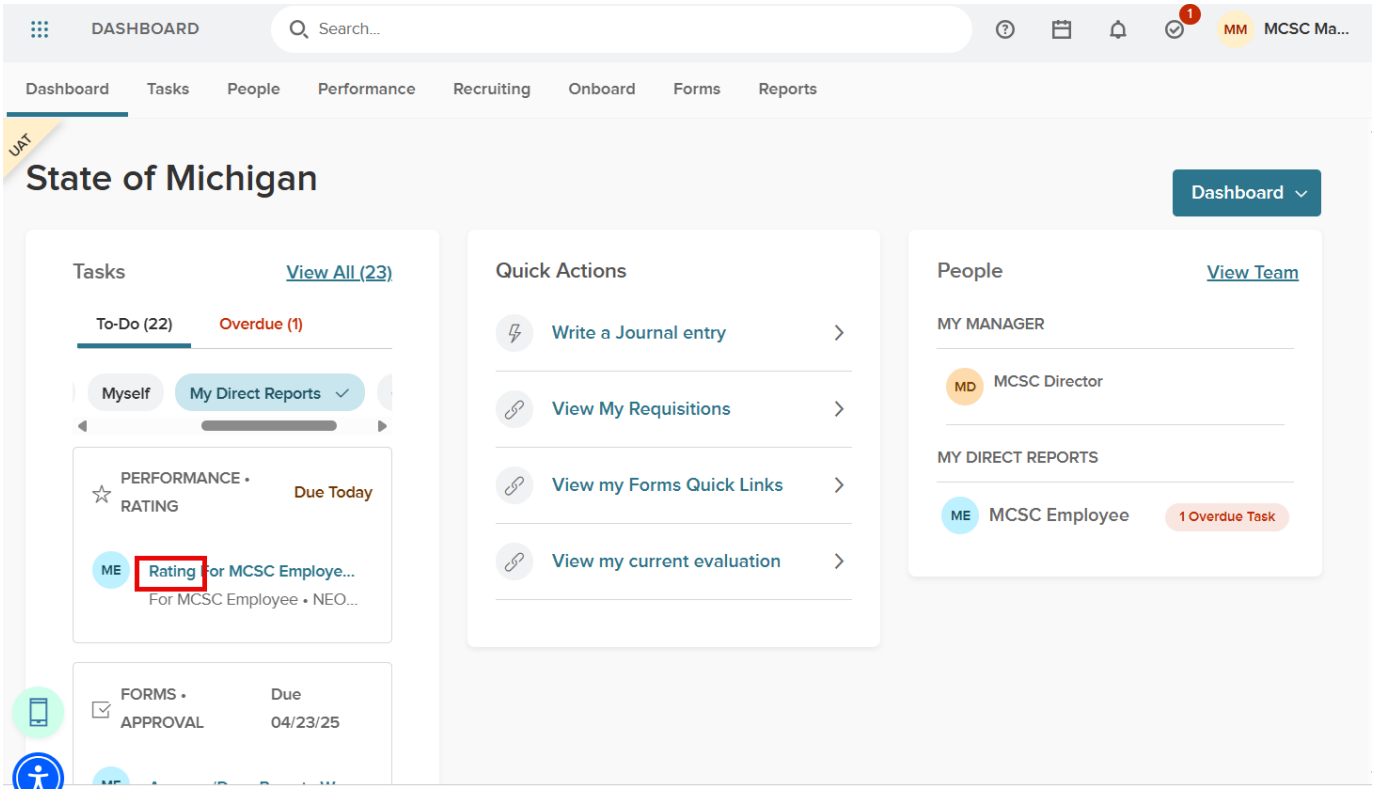
   NOTE: If a performance evaluation (plan) is reverted to Draft Status, and a change is made to Objectives and/or Competencies, a new email will be triggered asking for acknowledgement of the updated evaluation (plan). Follow the steps above to re-acknowledge the modified performance evaluation (plan).

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

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

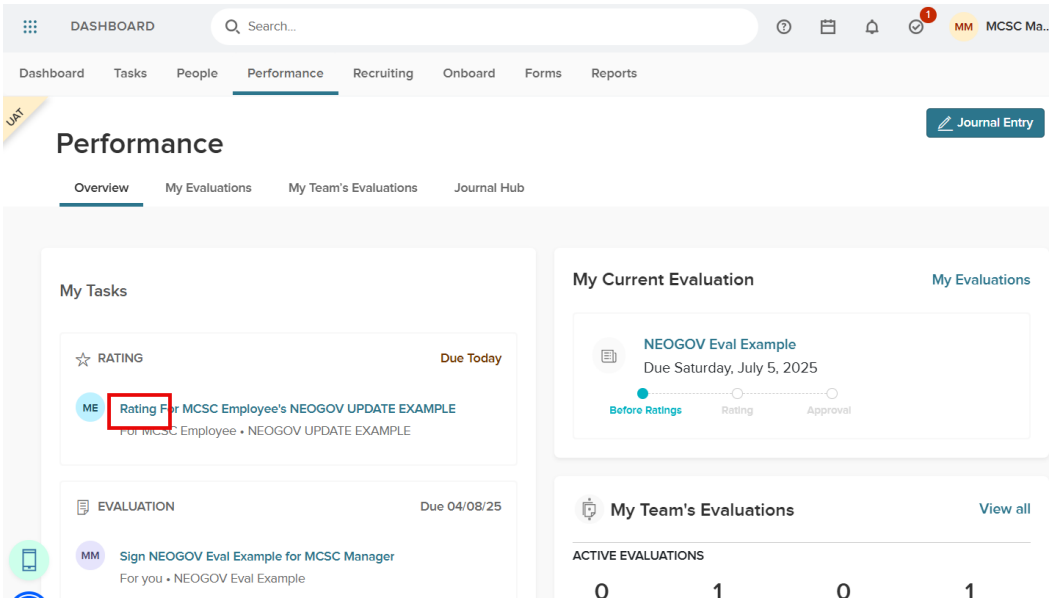
   Option 1: From the **Unified Dashboard**, **Tasks** section, click on the **Title** of the evaluation in the **Performance * Rating** section.

   NOTE: This section will include self-rating tasks if applicable.



Option 2: From the **Unified Dashboard, Performance Tab**, click on the **Rating** task in the **My Tasks** section.

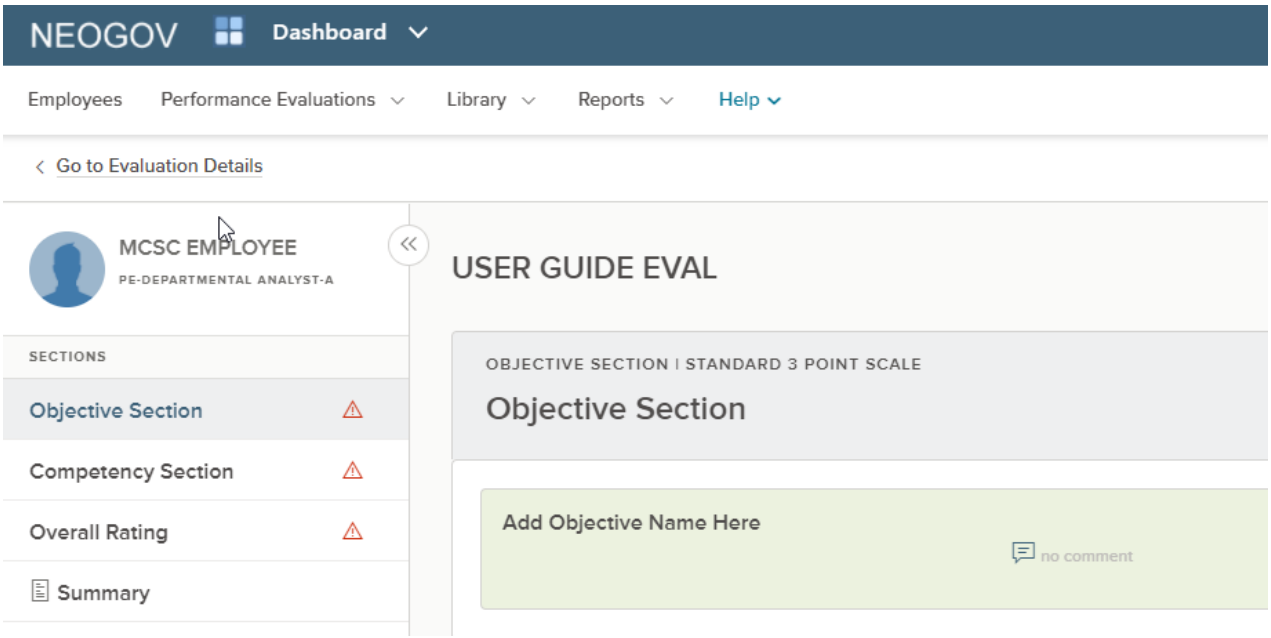
NOTE: This section will include self-rating tasks if applicable.



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.

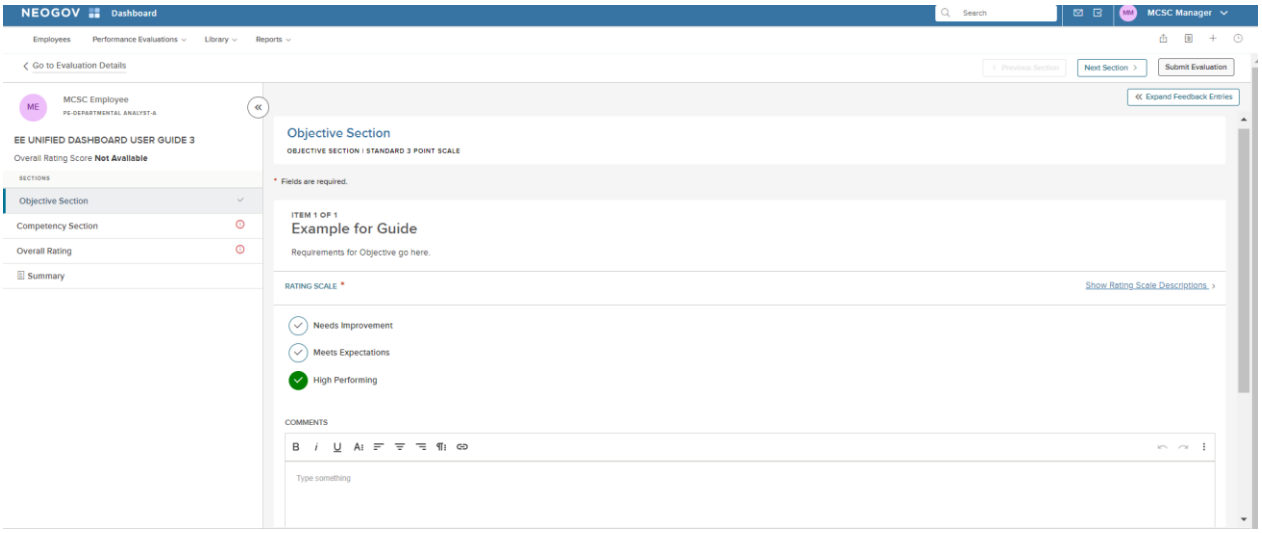
NOTE: You can also navigate through the objectives and competencies by clicking **Next, Prev,** or
Done as you complete the rating.



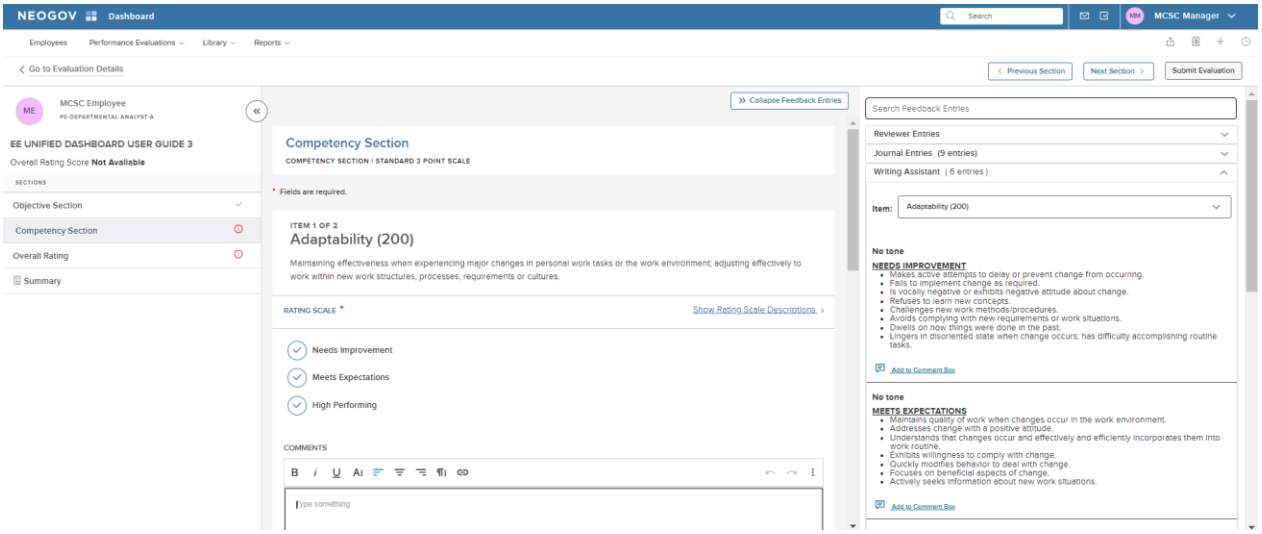
3. **Click on the check mark** next to the appropriate rating (note: the selection turns a green color. To deselect a rating click on it again). Comments can be entered and formatted. Click on **Next Section**.

   NOTE: The system **automatically saves** content as it is entered. If the need arises to logout mid-rating, the rating content that was entered will still be available the next time the rating form is accessed using the steps above.

   NOTE: If a self-rating is being done, the manager will see the rating and comments under the Reviewer Entries tab (after the rating is submitted). Journal entries and/or Check-In content is also available for selection to be added in the comments section.



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.



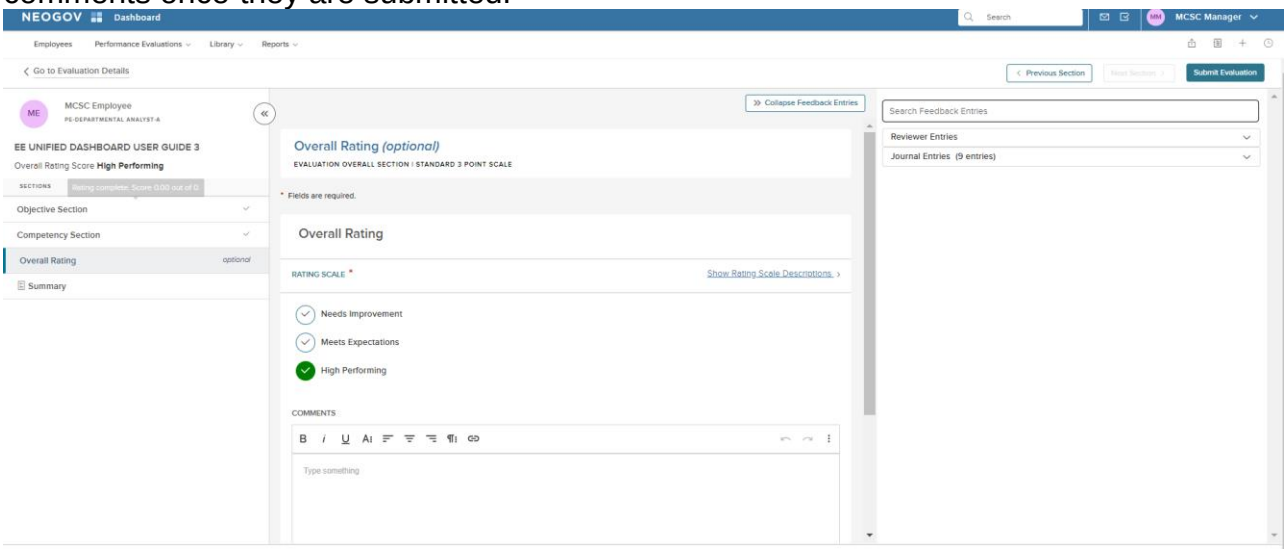
5. Once the BARS statements have been entered into the rating, they can be edited and formatted.

6. Previously entered **Journal Entries** and/or **Check-In Entries** are also available within the rating card to use in the comments section of objectives and competencies.

7. 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.

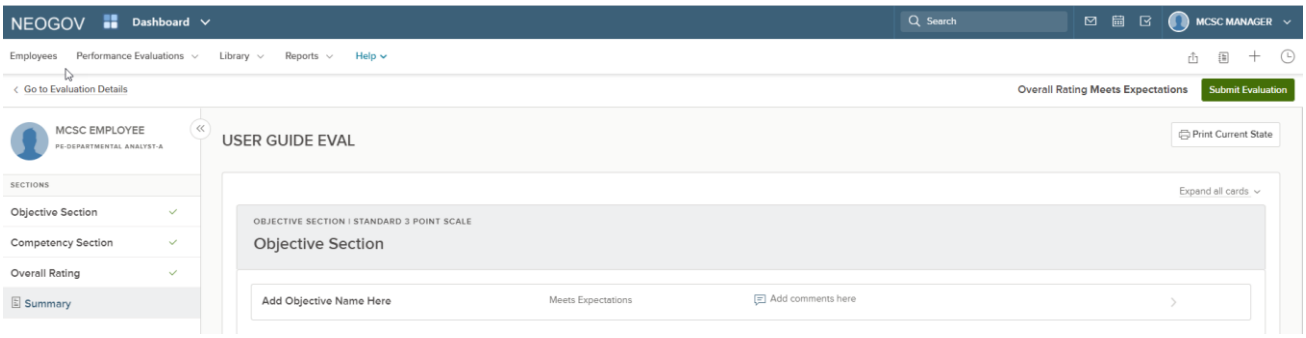
NOTE: If a self-rating is being done, the manager can see the selected ratings and comments once they are submitted.



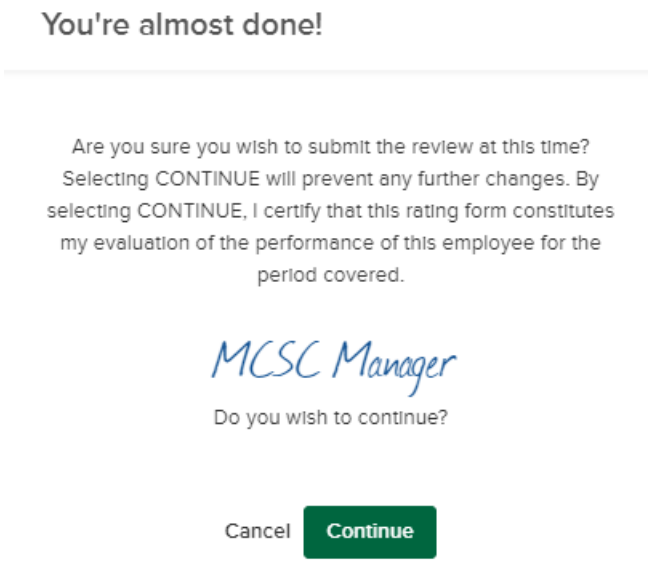
8. As previously mentioned, the system automatically saves the work.

9. 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.

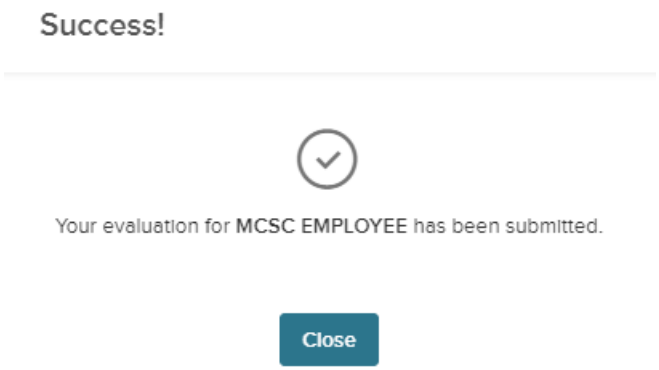
   NOTE: Once Submit Evaluation is selected, and certifications are done, the rating is considered to be complete and the evaluation moves to the next step in the evaluation process. It may be beneficial todiscuss a rating with the employee prior to submitted the rating so that changes can be made if necessary.



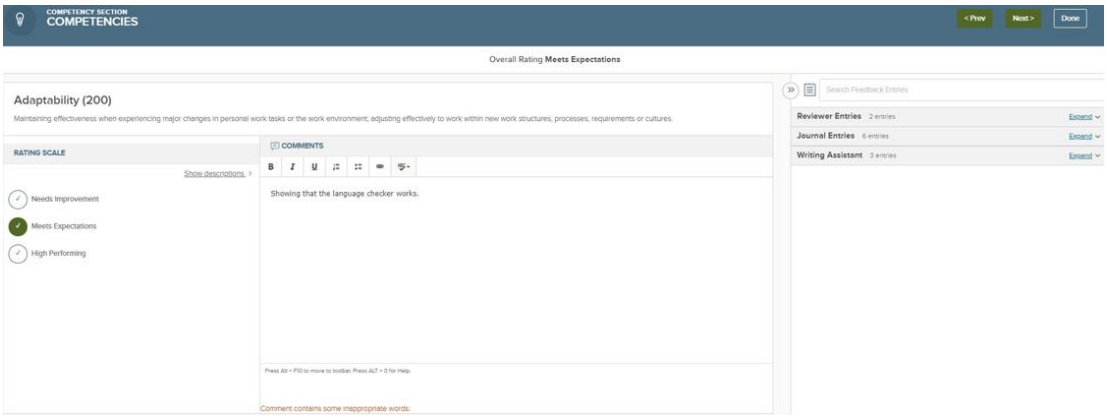
10. If **Submit Evaluation** is selected, the system will provide a certification statement for review. If changes are necessary, click **Cancel.** If changes are not necessary, click **Continue.**



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

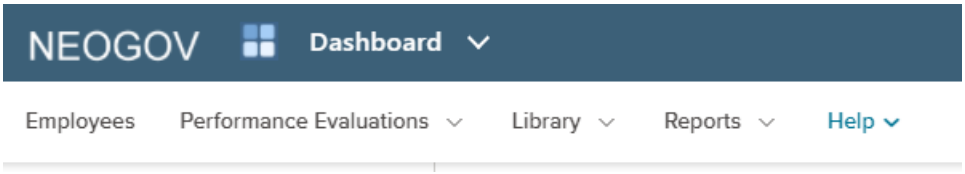


12. Please note that the system has a language checker in it, and if you try and submit a rating that contains inappropriate language, the system will alert you and provide you with an opportunity to make changes before certifying and submitting.

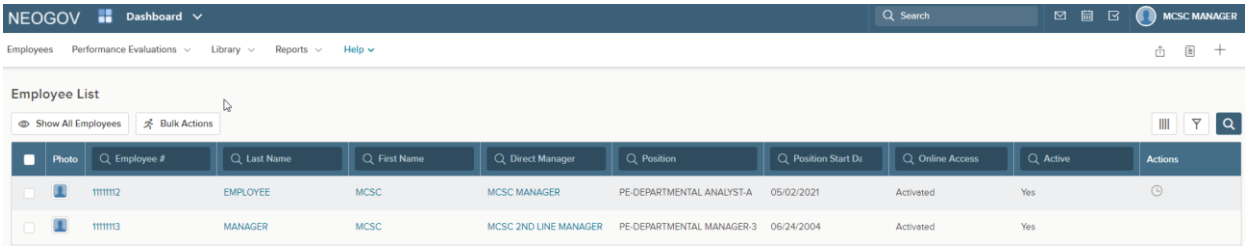


13. **For Managers**, once finished with a rating there are two options to rate another employee:

    Option 1: Click on **Dashboard** to return to your dashboard and follow the steps above.

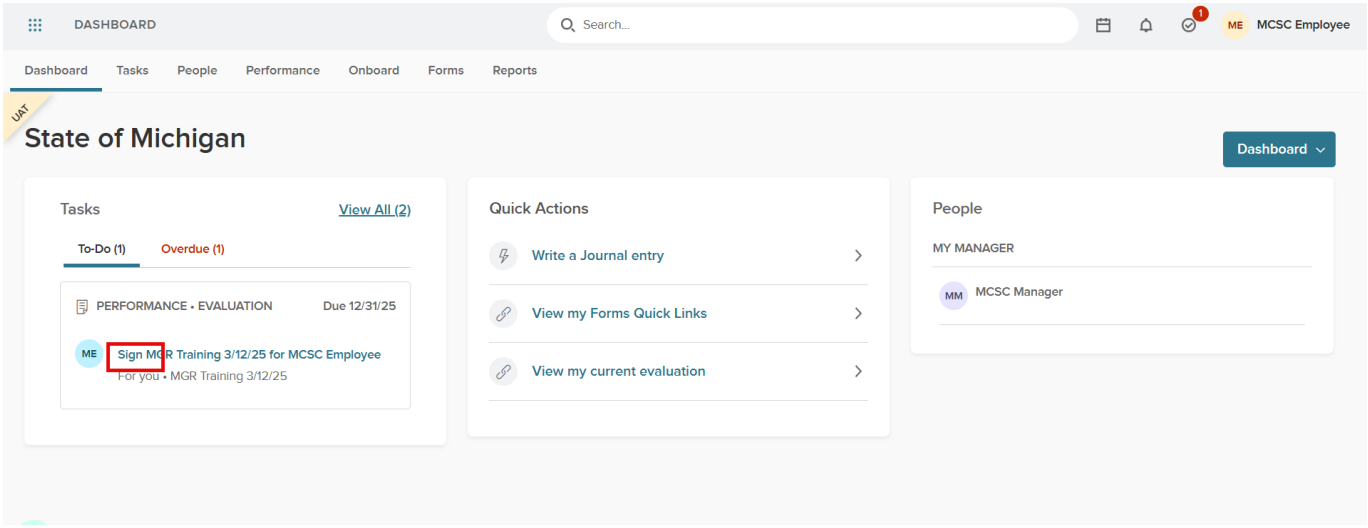


    Option 2: Click on **Employees** and search/select the employee to be rated, which takes you to their **Employee Details** screen.



Acknowledgement of Rating

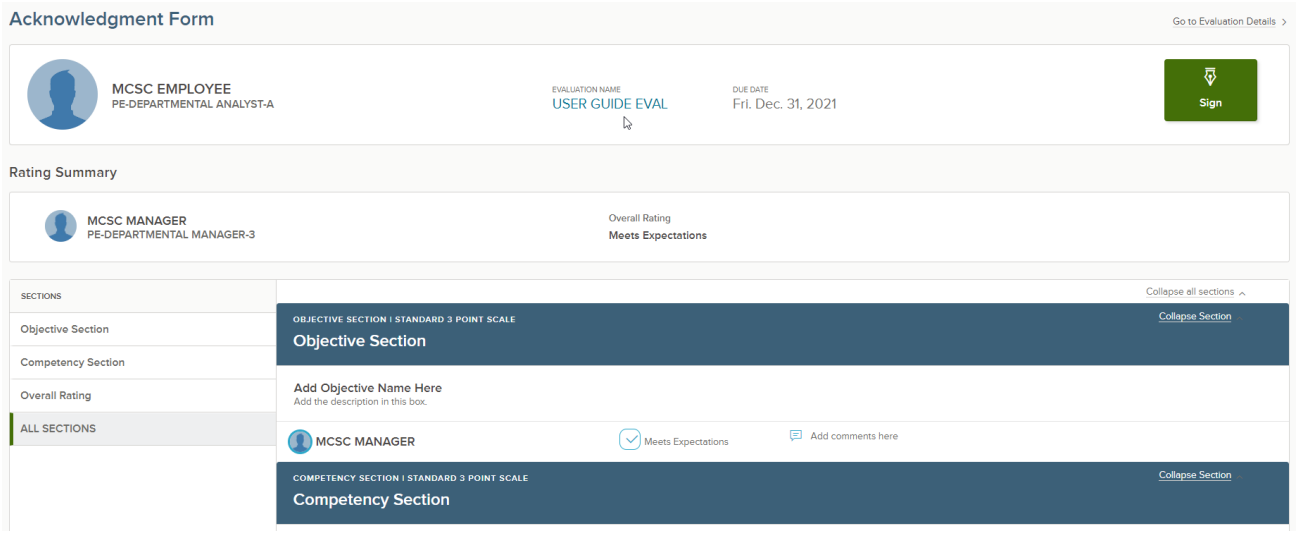
1. When you log in, you will arrive at your **Dashboard**. Because you have a rating that is ready for signature you will see a signature task listed in the **Tasks** section. Click on the subject, **Sign** which will take you to the **Signature** window.



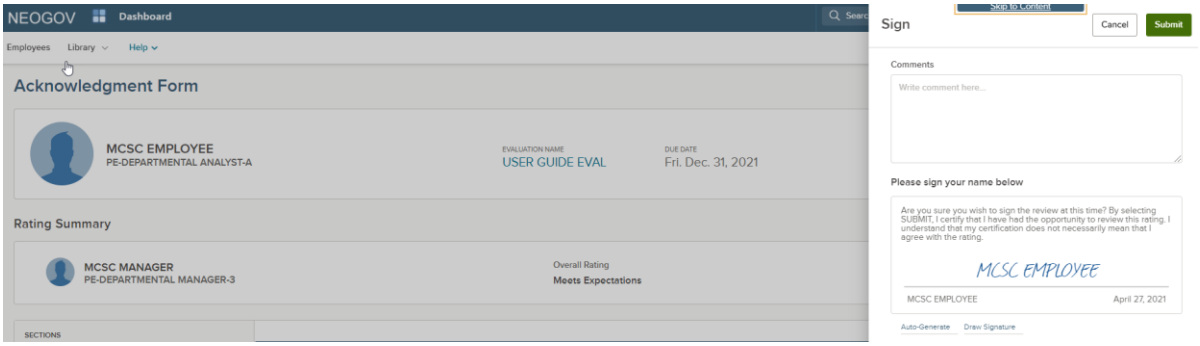
2. In the **Acknowledgment Form (After Ratings)** window, review the ratings assigned to each objectiveand competency in the performance evaluation (plan).

    a. If questions or concerns need to be addressed before completing the acknowledgement task, return to your dashboard by clicking on NEOGOV or Dashboard. The task will remain active and in your Tasks section of the dashboard. If you do not acknowledge your evaluation (plan) rating, please follow up with your manager.

3. Click on the **Sign** button to open the signature pane.



4. Enter any comments and acknowledge the rating by clicking on **Submit**.



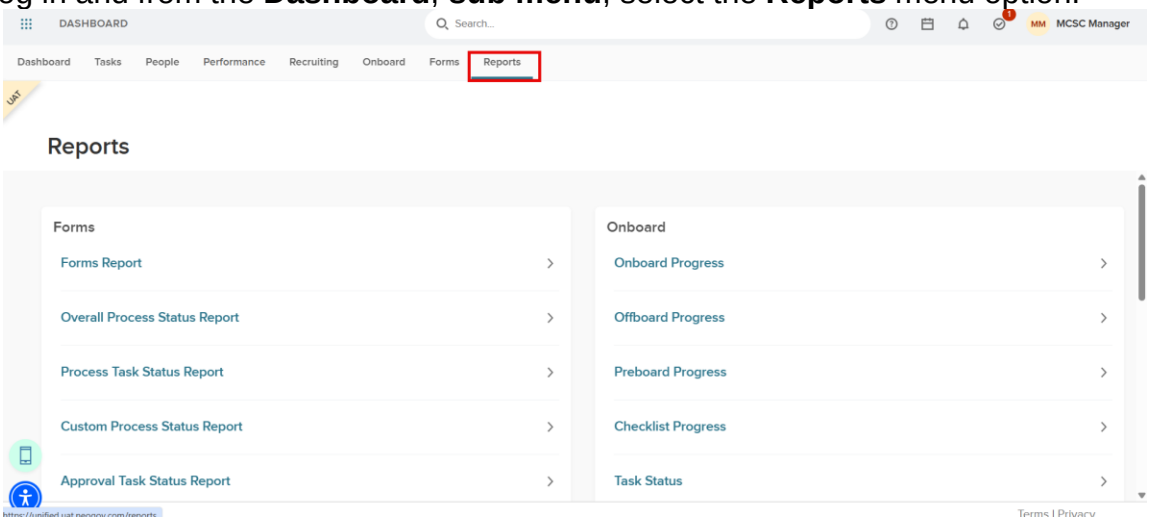
NOTE: Clicking on **Cancel** will return you to your dashboard without acknowledging the performanceevaluation (plan) rating. If you do not acknowledge your performance evaluation (plan) rating, pleasefollow up with your manager.

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

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.

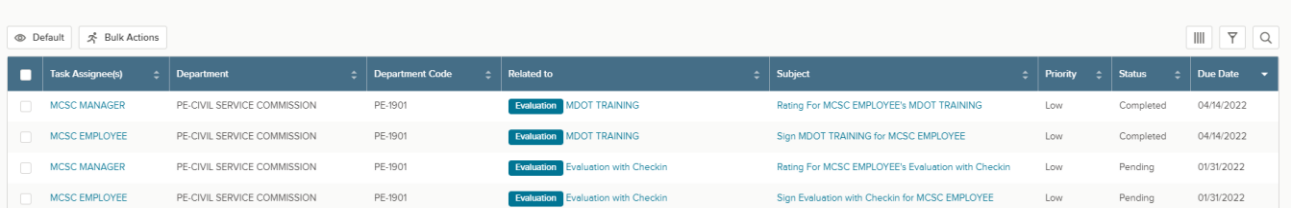
1. Log in and from the **Dashboard**, **sub menu**, select the **Reports** menu option.



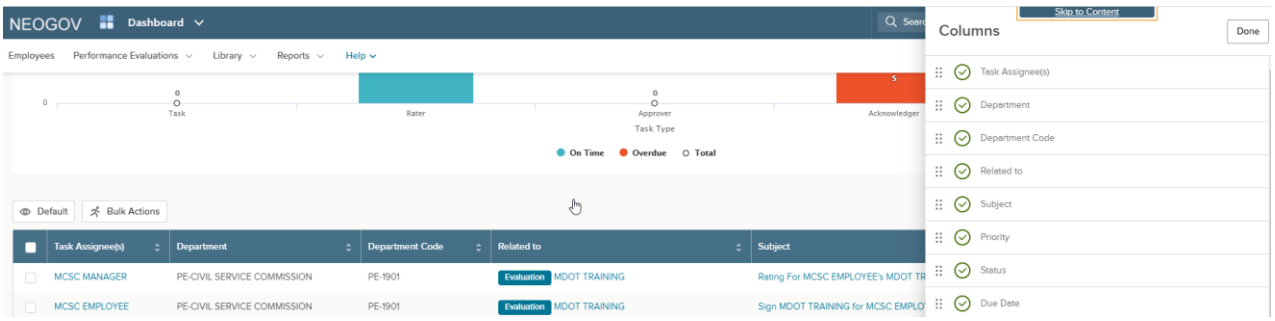
NOTE: All of the reports listed have the same general configuration and field choices; however, they are specific to the title listed. For purposes of this document, I will select the **Task Status Report** to go over the fields and their functions.

2. In the **Performance** box, 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.

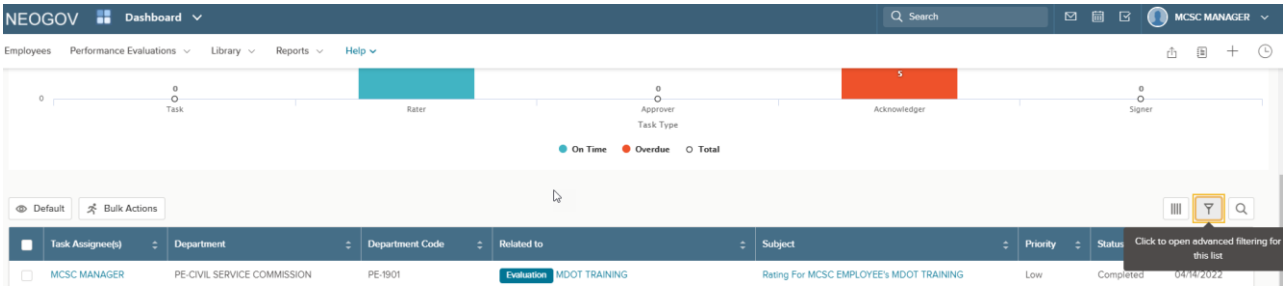
3. Select the icon with four (column) lines on it to choose the columns to display.



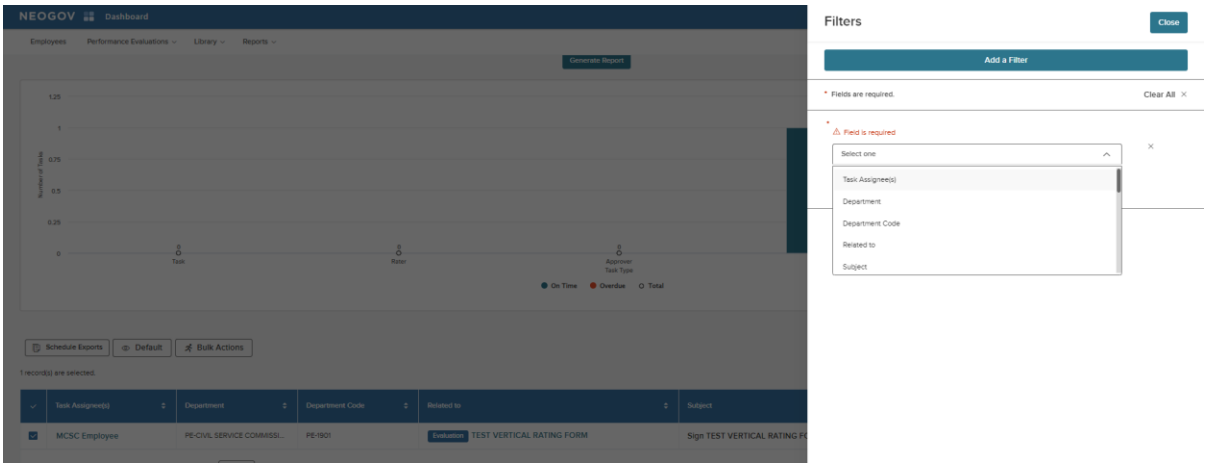
4. In the **Columns** fly out window, **select** the columns to display by clicking on the **name**. When a **green check mark** appears next to the column name, the column will display in the report. To **deselect** a column, click on the name. Use the **6 dots icon** to **drag and drop** the columns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



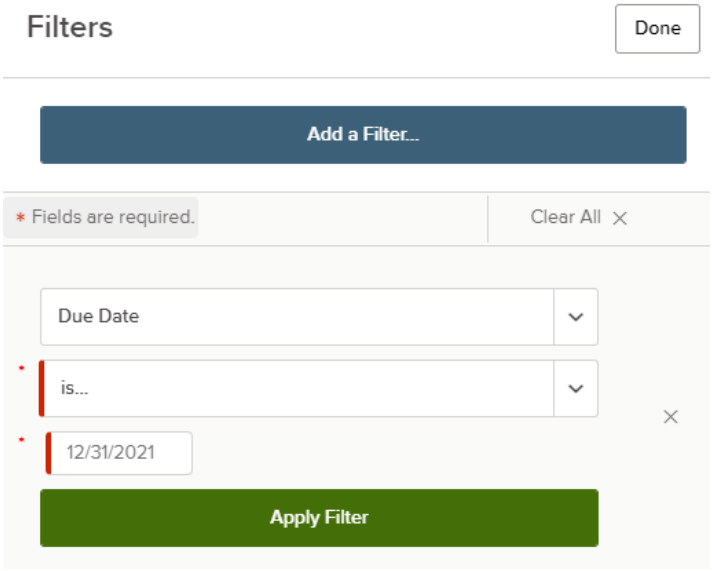
5. Use the **Filter** icon (next to the columns icon) to add any applicable filters to the report.



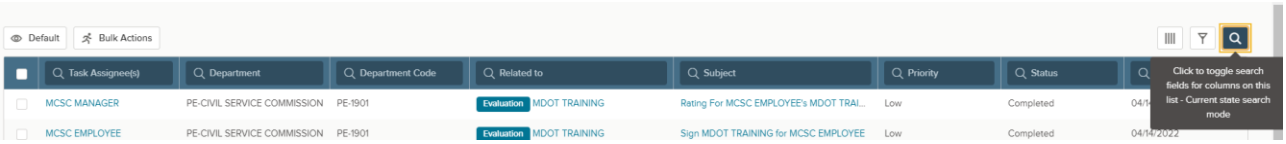
6. On the **Filters** screen, click on **Add a Filter**.



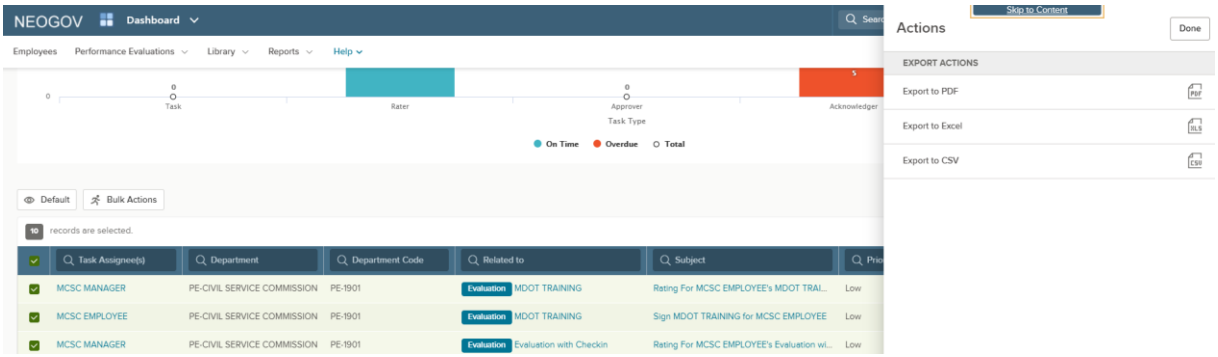
7. From the drop down options, select the item to **Filter** on. Then add the **Operation** to take place and any **Specific Criteria**. Click on **Apply Filter**. If additional filters are desired, repeat the steps. When all filters are in place, click on **Done**.



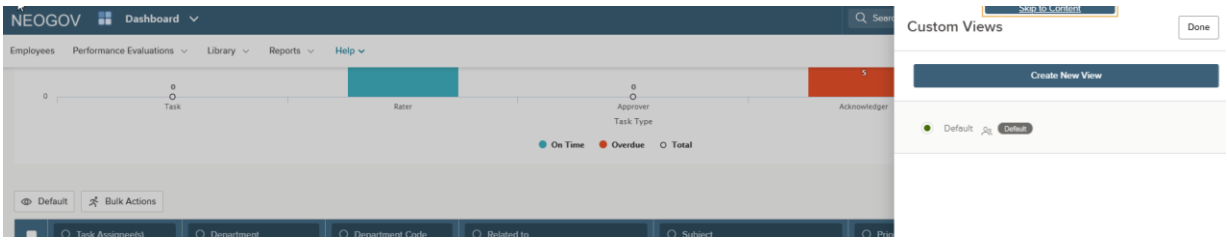
8. The search icon can also be used to filter by typing the criteria into the search box.



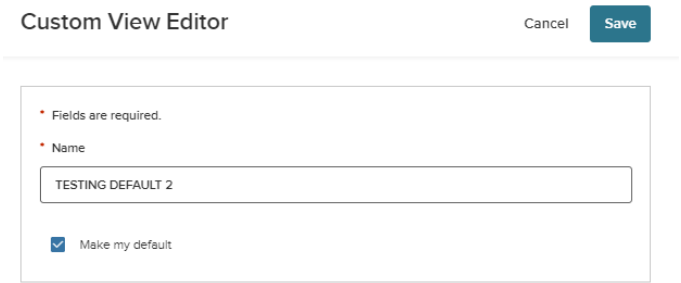
9. When the report criteria are set you can **export** your report to PDF, Excel, or CSV format by selecting the records you'd like to export and clicking on **Bulk Actions**. Choose the **Export** option and click on **Done**.



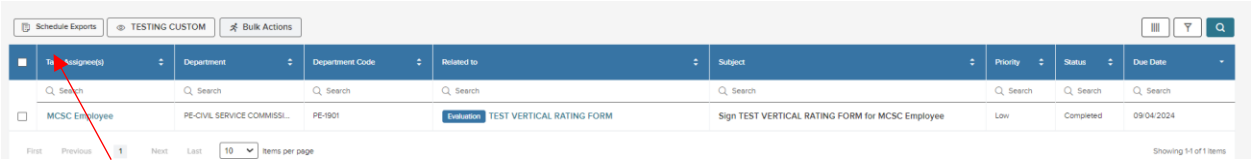
10. The ability to create a **custom view** within the report is available to users. To create a custom view,click on **Default**. In the Custom Views slide out window, click on **Create New View.**



11. Enter a **Name** for the view. The report can be made your default view by checking the associatedMake my default checkbox.



12. The ability to schedule an **auto-export** of the report is available by selecting **Schedule Export.**



13. Choose the view you wish to schedule the report based on**,** and then complete the required fields.
14. Click on **Save**.
15. To return to your **Dashboard** click on **Dashboard**.