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.

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

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 - d. Notes and Attachments within the Evaluation
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- 5. <u>Acknowledgement of Evaluation (Plan)</u> (Employee)
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LOGIN

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

The browser that works best with NEOGOV is Google 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.

	NEOGOV
Username	
Password	
All fields are re	quired
	Log In
	Forgot your username or password?

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.

<	Back to Login Page
L	_ogin Assistance
E y p	nter your email address and we'll send you our username and a link to reset your assword.
	mail
	Send Email

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.

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Tasks 2 View All (100+)	Quick Actions		People 3	View Team
To-Do (0) Overdue (100+)	♀ Write a Journal entry	>	MY MANAGER	
View my tasks related to: All Myself My Direc	S View My Requisitions	>	BRANDYE HUNT	
There are 0 To-Do tasks	S View my Forms Quick Links	>	MY DIRECT REPORTS	
	S View my current evaluation	>	M MCSC IT User	

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.

MM (MCSC MANAGER	Overview My Evaluations My Team's Evaluations Journal Hub		🖉 Journal Entry
PE-DEPARTMENTAL MANAGER-3 PE-CIVIL SERVICE COMMISSION MDCS <u>My Profile</u> Deshboard	My Tasks	My Current Evaluation	My Evaluations
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Performance Recruiting Forms		My Team's Evaluations	View all
alli Reports		AL TOY LAVALANIADOS 1 0 0 Dat Balan Range Range	O Approval
		OVERDOE TASKS For all evaluations in <u>all atstures</u> ~	
		O	
		☐ ALL OVERDUE TASKS (0)	

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.

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Dashboard Tasks	People Performance Recruiting Onboard	Forms Reports				
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Fellolill	ance					
Overview	My Evaluations My Team's Evaluations Journal Hub					
My Evalu	uations					
Current (1)	Upcoming (1) Completed (0) Other (0) All (2)					
E) N	EOGOV Eval Example					
Du	Je Saturday, Jul 5th 2025 - Type: Probation					Current

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.

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Dashboard Tasks People Performance Recruiting Onboa	rd Forms Reports	
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Overview My Evaluations My Team's Evaluations Jour	nal Hub	
$\fbox{$\downarrow$ Sort \lor} \qquad \fbox{$\overleftarrow{\neg}$ Filters \lor}$		Q Search by Employee or Evaluation name
All Evaluations		
NEOGOV UPDATE EXAMPLE Due Tuesday, April 1, 2025	Mcsc Employee	O Before Ratings Rating Approval
MGR Training 3/12/25 Due Wednesday, December 31, 2025	Kcsc Employee	Before Ratings Rating Approval
First Province 1 Next Last 10	Heme per page	Showing 12 of 2 Borns

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.

Dashboard	Tasks People Performance Recruiting Onboard Forms Reports	
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Oven	View My Evaluations My leam's Evaluations	
	Current (0) Pending (0) Archived (0) All Drafts (0)	
	↑↓ Sort ∨ X [*] Actions ∨	
	Journals can also be created by sending an email to journals-uat@neogov.net. The email subject should be the employee's full name. One attachment can be included (SMB may and supported types) off visitions and visiting of a constraint of the provided type of the sendence of the provided type of the sendence of the provided type of the sendence of the provided type	
	be included (JMb fillax and supported types, pai, xis, xisx, ppt, ppx, pox, doc, docx, tx, ru, binp, gir, jpeg, jpg, prig, ur, un, wp, wpa, csv, zip.)	
	Sort: Update Date • Newest First	
	No Data.	
Irnal Ent	ries	

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.

te of Michigan					Dashboard
asks <u>View All</u>	(23)	Quick Actions		People	View Tear
To-Do (22) Overdue (1)		Write a Journal entry	>	MY MANAGER	
View my tasks related to: All V Myself My	Dire	& View My Requisitions	>	MD MCSC Director	
PERFORMANCE • RATING Due Tod	ау	So View my Forms Quick Links	>	MY DIRECT REPORTS	
Rating For MCSC Employee's NEOGOV UPD For MCSC Employee • NEOGOV UPDATE EXA		S View my current evaluation	>	MCSC Employee	1 Overdue Task
RECRUITING • REVIEW Due Frid	ay				

- 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.
- 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.

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63												
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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).

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

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



- 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 unlockedor 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

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Onboard Forms Reports			
Quick Actions	Pe	ople	View Team
G Write a Journal entry	> MY	MANAGER	
View My Requisitions	>	MCSC Director	
S View my Forms Quick Links	> MY	DIRECT REPORTS	
 View my current evaluation 	>	MCSC Employee	1 Overdue Task
	Q. Search Onboard Forms Reports Quick Actions Image: Comparison of the second s	Q. Search Onboard Forms Reports Quick Actions Per @ Write a Journal entry > @ View My Requisitions > @ View my Forms Quick Links > @ View my current evaluation >	Q. Search Onboard Forms Reports Quick Actions Image: People Image

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**.

Evaluation with Checkin Evaluation Check-In for MCSC EMPLOYEE DRAFT AUTOSAVED ON 04/19/2021 01:03:38 PM			Close Publish
marks a required field.		Journal Entries	Previous Check-Ins
This check in will be viewable only by the task assignee prior to releasing the evaluation.		Search Feedback Entries	
Oueston 1 Identify Topics to Discuss at Quarterly Touchpoint Meeting • B I U iz iz Image: Imag	Filter	s: Author: Myself Mon Apr 19, 2021 11:29 AM Adding a journal entry and E Add to comment box	Date: Past 12 Months V MCSC MANAGER As shared agging a competency @adapt Image: Competency and Competency an
Enter check-in text here.	٩	Wed Feb 03, 2021 09:35 AM Adding a journal entry. Add	I MCSC MANAGER 🎘 shared
Press Alt - FI0 to move to toolbar. Press ALT - 0 for Help.			

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.
- 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).

NEOGOV 🚦 Dashboard	*		Q, Search	🚺 MCSC MANAGER 🗸
Employees Performance Evaluations	✓ Library ✓ Reports ✓ Help ✓			∆ B + ⊙
	User Guide Dow Date: Thu: Feb. 11, 2021			
Position: PE-DEPARTMENTAL MANAGER-3 Department: PE-CIVIL SERVICE COMMISSION MDCS	EVALUATION DETAILS Current Status: Draft Type: Periodic	SCORES OVERALL RATIVO Pending	EMPLOYEE DETALS Position: PE-DEPARTMENTAL MANAGER-3 Department: PE-CIVIL SERVICE COMMISSION MDCS Delaism: PE-CIVIL SERVICE ENABLETS	
View Org Chart	0		DWISION: PE-EMPLOTEC BENEFITS	0

- 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.

MCSC MANAGER	User Guide Due Date: Thu. Feb. 11, 2021			
Position: PE-DCPARTMENTAL MANAGER-3 Department: PE-CIVIL SERVICE COMMISSION MDCS View Org Chart	EVALUATION DETAILS Current Status: Draft Type: Pencelic	٥	SCORES OVERALL METHO Pending	EMPLOYE DETALS Phatman: PE-CPNaTMENTAL MAALGER 3 Department: PE-CVX SERVICE COMMISSION INDOS DMAIRE: PE-LINE/OYEE REMITITS
Manager(s)	Content Process			
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		Description		Present
•	nems	Description		Progress
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	COMPETENCY SECTION STANDARD 3 POINT SCALE	: ()		4
	Items	Description		
	Valuing Diversity and Inclusion (310)	Actively appreciating and including the di-	verse capabilities, insights, and ideas of others and working effectively and respectfully with individuals of dive	rse backgrounds, styles, abilities, and motivations.
	Delegating Responsibility (310)	Allocating decision-making authority and/	or task responsibility to appropriate others to maximize the organization's and individual's effectiveness.	

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 <u>MCSC-NEOGOV@michigan.gov</u> for assistance in editing/removing content from this section.

Notes & Attachments

+ Add Notes & Attachments

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.

Composition of the second of t	USER GUIDE EVAL ∠ Due Date: Fri. Dec. 31, 2021 ∠ Copy						
	EVALUATION Current Stat Type: Perior Evaluation P	DETALS al: Define Remons for More Standardo O	SCORES OVERALI Pen	. RATING Ging	EMPLOYEE DETAILS Publice: PE-DESNATIVEYTAL ANALYSTA Department: PE-CVR. SERVICE COMMISSION MOCS Division: PE-BAS SECURITY		
Manager(s)	Content • Indica	Process les à required step					
	Ō	Before Ratings Signature * MCSC EMPLOYEE	Due Mon, Apr 26, 2021	Status Current			
		Ratings					
	2	Rating * MCSC MANAGER	Due Fri, Dec 31, 2021	Status Pending	Weight 500 %		
		After Ratings					
	3	Signature * MCSC EMPLOYEE	Due Fri, Dec 31, 2021	Stetus Pending			

- 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.

DASHBOARD	Q Search		0 🛱	
ashboard Tasks People Performance Recruiting C	nboard Forms Reports			
State of Michigan				Dashboard v
Tasks View All (22)	Quick Actions		People	View Team
To-Do (21) Overdue (1)	Write a Journal entry	>	MY MANAGER	
View my tasks related to: All Myself My Dire	S View My Requisitions	>	MD MCSC Director	
RECRUITING - REVIEW Due Friday	S View my Forms Quick Links	>	MY DIRECT REPORTS	
Job: Prod Support Testing 020525 (Prod Sup Department: Z1 CSC/0BAS Administrative Use Only Conditiates: 2	View my current evaluation	>	MCSC Employee	1 Overdue Task
PERFORMANCE • EVALUATION Due 04/08/25				

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**.

D	Performance		🖉 Journal Entry
	Overview My Evaluations My Team's Evaluations	Journal Hub	
	My Tasks		My Current Evaluation My Evaluations
	ACKNOWLEDGMENT MM Sign UNIFIED DASHBOARD USER GUIDE-1 for MCSC MANAGER For you - UNIFIED DASHBOARD USER GUIDE-1	▲ Due 02/12/21	User Guide Cue Thursday, February 11, 2021 Control Co
	CHECK IN Check In For MCSC EMPLOYEE - Evaluation with Checkin	Due 07/19/21	 Perform Links Performance Evaluation List Objective List Competency List

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**.



Performance

Overv	iew My Evaluations	My Team's Evaluations	Journal Hub
My Ev	valuations		
Current	: (1)		
	User Guide Due Thursday, Feb 11th 2021 Status: Draft		
Upcom	ing (1)		
	UNIFIED DASHBOARD USER GUIDE-1 Due Friday, Dec 31st 2021 Status: Before Ratings		

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.

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Dashboard Tasks People Performance	Recruiting Onboard Forms Reports	
state of Michigan		Dashboard ∨
Tasks <u>View All (22)</u>	Quick Actions	People <u>View Team</u>
To-Do (21) Overdue (1)	Vite a Journal entry	MY MANAGER
View my tasks related to:	∂ View My Requisitions >	MD MCSC Director
E RECRUITING • REVIEW Due Friday	Ø View my Forms Quick Links →	MY DIRECT REPORTS
Job: Prod Support Testing Department: Z1 CSC/OBAS Administrative Use Only Candidates: 2		ME MCSC Employee 10verdue Task
PERFORMANCE · Due 04/08/25		



- 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.

People / MCSC's Profile		
MCSC EMPLOY PE-DEPARTMENTAL ANALYST PE-CIVIL SERVICE COMMISSIO	EE -a DN MDCS	
Job & Pay Performance	Documents	Onboarding
Performance		
Performance Evaluations	Active	
Current		
E Testing Conditional Ste ▲ Due Wednesday, March ⊘	p h 31, 2021 • Type: Periodic Approval	

- 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**.

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Dashboard Tasks People Performance Recruiting	Dnboard Forms Reports			
State of Michigan				Dashboard ~
Tasks View All (22)	Quick Actions		People	View Team
To-Do (21) Overdue (1)	₿ Write a Journal entry	>	MY MANAGER	
View my tasks related to: All Myself My Dire	S View My Requisitions	>	MD MCSC Director	
RECRUITING - REVIEW Due Friday	View my Forms Quick Links	>	MY DIRECT REPORTS	
MM Job: Prod Support Testing 020525 (Prod Sup Department: Z1 CSC/OBAS Administrative Use Only Candidates: 2	 View my current evaluation 	>	ME MCSC Employee	1 Overdue Task
PERFORMANCE • EVALUATION Due 04/08/25				

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.

Performance	е			🖉 Journal Entry
Overview	My Evaluations	My Team's Evaluations	Journal Hub	
My Team's Eva	aluations (4)			
0		2	0	2
Draft		Before Ratings 🛛 🔓	Reting	Approval
_				
↑↓ Sort 🗸	Filters 🗸			Q Search by Employee or Evaluation name
All Evaluations				
E Evaluation Due Monday	with Checkin y, January 31, 2022		(MC) Mcsc Employee	Before Ratings Rating Approval
USER GUIE Due Friday, D	DE EVAL December 31, 2021		Mcsc Employee	Gefore Ratings Rating Approval

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.

Roll	Roll Over Objectives From Previous Evaluation					
Object		Q				
	Name 🗲	Category 💠	Description 🗘	Due Date	¢	
	Q Search	Q Search	Q Search	Q Search		
	Support NEOGOV eForms	Employee	Continue to support NEOGOV eForms including working			
	Support NEOGOV Onboard	Employee	Continue to support NEOGOV Onboarding including wo			
	Remote Work Standards	Employee	As remote work continues, enter daily journal entries int			

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.

Cancel Save and Add Another Save

• Employee objectives are associated with the employee's activities for the review (evaluation) period.

* Fields are required.			
Objective Name *			
Add Objective Name Here			
Objective Due Date	Category *		
select date (MM/DD/YYYY)	Employee	~	
Description	Descript	ion	
Add the description in this box.	•		

3. Click on Save

Sective Add Objective

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.

USER GUIDE EVAL Due Date: Fri. Dec. 31, 2021											
Dirint • Start											
EVALUATION DETAILS Current Status: Droft Type: Periodic	SCORES	EMPLOYEE DETAILS Position: PE-DEPARTMENTAL ANALYST-A Department: PE-GIVIL SERVICE COMMISSION MI Division: PE-BAS SECURITY	ocs ©								
Content Process Process Process Objective Section											
Items Description		Progress	Actions								
Add Objective Name Here Add the description in t	nis box.	0%	∠ ×								

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.

NEO	GOV 🔡 Dashboard 🗸					۹	Search		🚺 MCSC MANAGER 🗸
Employee	es Performance Evaluations v Libra	ry 🗸 Reports 🗸 Hel	p 🗸						A B + C
Evalu	lation List								
@ E	valuation List 25 Bulk Actions								III 🝸 Q
	Q. Name	Q Employee #	Q Employee	Q Department	Q Raters of Reco	Q Type	Q. Due Date	Q. Status	Actions
	UNIFIED DASHBOARD EE USER GUIDE-1	1111112	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	09/30/2021	Completed	
	UNIFIED DASHBOARD USER GUIDE-1	11111113	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION MDCS	ON HRUSER	Periodic	12/31/2021	Before Ratings	
	EE UNIFIED DASHBOARD USER GUIDE-2	1111112	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION MDCS	MCSC MANAGER	Periodic	12/31/2021	Canceled	
	User Guide	1111113	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION MDCS	ON HRUSER	Periodic	02/11/2021	Draft	

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

NEO	GOV 👬 Dashboard 🗸	Q, Searc	Actions	Done					
Employee	s Performance Evaluations ~ Libra	ry v Reports v	Help 🗸					EXPORT ACTIONS	
Evalu	ation List							Export to PDF	d Por
@ Ev	raluation List 🖉 Bulk Actions							Export to Excel	INLS
•	Q Name	Q. Employee #	Q Employee	Q Department	Q, Raters of Reco	Q Type	0	Export to CSV	CSU
0	UNIFIED DASHBOARD EE USER GUIDE-1	11111112	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	09/:	EVALUATION BULK ACTIONS	
	UNIFIED DASHBOARD USER GUIDE-1	1111113	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION MDCS	ON HRUSER	Periodic	12/3	Assign Objectives	Ŷ
	EE UNIFIED DASHBOARD USER GUIDE-2	11111112	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION MDCS	MCSC MANAGER	Periodic	12/3	Print	ē

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.

Step 2 of 3: Objectives Assignment											+	Objective			
														From Libra	ry
														New Object	tive
			d	P											
No Okintika hara bara adad															
			No Objectives in	Idvs	e been a	uue	-u								
Selected Evaluations															Q
					-										
Name	Employee	÷	Department		Туре	•	Due Date	÷	Status ‡	0	verdue	÷	Section to Add Objective		
UNIFIED DASHBOARD USER GUIDE-1	MCSC MANAGER		PE-CIVIL SERVICE COMMISSION MDCS		Periodic		12/31/2021		Before Ratings	N	0		Objective Section		~

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

贤 Add Objective			Cancel Save and Add Another Save
General			
* Fields are required	i.		
Objective Name *	T		
Add Objective Nam	e Here		
Objective Due Date		Category *	
select date (f	MM/DD/YYYY)	Employee v	
Description	n in this hav!		
Add the description	in mana boxi		

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**.

Selected Evaluations								Q
Name 🔺	Employee \$	Department ‡	Type 🗘	Due Date 🗘	Status ‡	Overdue 🗘	Section to Add Objective	
UNIFIED DASHBOARD USER GUIDE-1	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION MDCS	Periodic	12/31/2021	Before Ratings	No	Objective Section	~

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

tep 2 of 3: Confirmation Page										
Employee Name 🔺	Evaluation Name	Evaluation Type 🗘	Evaluation Status	Evaluation Due Date 🗘	Section Name	Section Response Format				
MCSC MANAGER	UNIFIED DASHBOARD USER GUIDE-1	Periodic	Before Ratings	12/31/2021	Objective Section	Standard 3 Point Scale				
						Showing 1 - 1 of 1 items				
			Edit Submit							

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

NEOGOV 🗵 Perform 🗸	Q. Search 🛛 🗐 🖸 🕕 MCSC MANAGER 🗸
Dashboard Employees Performance Evaluations v Library v Reports v Help v	± 10 + ©
Step 3 of 3: Bulk Actions Status	< Go back
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.	
\odot Bulk operation is complete, records that could not be processed are shown below.	
80%	

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.
 - Compensation Plan 4/4/2021 (PDF Version)
 NOTE: The PDF version of the Compensation Plan is static and not updated throughout the fiscal year.
 Section A Alphabetic List of Classes 4/4/2021 2
 Section B Numeric List of Pay Ranges 4/4/2021 2
 Section C Pay Schedules for Classifications in Performance Pay Programs, Senior Attorney, IT Analysts/Coordinators P11, State Police Digital Forensics Analyst, Student
- 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	Ν	Н	BWN2	Y	2	CL2	\$21.66	\$27.20
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y23	Ν	н	BWN2	Υ	2	CL2	\$20.88	\$28.74
Departmental Analyst-E	10	DEPTALTE	NERE-174	Y99	Ν	н	BWN2	Υ	2	CL2	\$20.88	\$28.74
Departmental Analyst-E	P11	DEPTALTE	NERE-174	Y23	Υ	н	BWE1	Υ	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**.

Assistants, Transitional and Bargaining Unit T01 4/4/2021 📆

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)

Adď	Items		Cancel Save
Comp	etency library		٩
2	records are selected.		Select all 17 records Clear selection
	Q 100 ×	Q Category	Q Description
	Adaptability (100)	Group 1 Competencies	Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; a
	Applied Learning (100)	Group 1 Competencies	Assimilating and applying new job-related information in a timely manner.
	Building Customer Loyalty (100)	Group 1 Competencies	Effectively meeting customer needs; building productive customer relationships; taking responsibility for custom
	Communication (100)	Group 1 Competencies	Clearly conveying and receiving information and ideas through a variety of media to individuals or groups in a m
	Contributing to Team Success (100)	Group 1 Competencies	Actively participating as a member of a team to move the team toward the completion of goals.
	Decision Making (100)	Group 1 Competencies	Identifying and understanding issues, problems, and opportunities; comparing data from different sources to dra
	Impact (100)	Group 1 Competencies	Creating a good first impression, commanding attention and respect, showing an air of confidence.
	Initiating Action (100)	Group 1 Competencies	Taking prompt action to accomplish objectives; taking action to achieve goals beyond what is required; being pr
	Innovation (100)	Group 1 Competencies	Generating innovative solutions in work situations; trying different and novel ways to deal with work problems a
	Integrity/Honesty (100)	Group 1 Competencies	Contributing to maintaining the integrity of the organization; displaying high standards of ethical conduct and un
<<	< 1 2 > >> Items per page 1	o	Showing 1 - 10 of 17 items

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

₽ C	<pre> competency section standard 3 POINT Scale ① Competency Section + </pre>								
	ltems	Description	Actions						
:	Adaptability (200)	Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively t.	×						
:	Building Strategic Working Relationships (Identifying opportunities and taking action to build strategic relationships between one's area and other areas, teams, departments, a	×						
:	Adaptability (100)	Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively t.	×						
:	Applied Learning (100)	Assimilating and applying new job-related information in a timely manner.	×						

Notes & Attachments

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

	Items De	escription	Progress	Actions	
MCSC EMPLOYEE	Add Objective Name Here Ad	dd the description in this box.	0%	∠ ×	
Position: DEPARTMENTAL ANALYST- A Department: PE_CIVIL SERVICE	© COMPETENCY SECTION STANDARD 3 POIN Competency Section	NT SCALE ①		+ Add Competencie	
View Org Chart	Items	Description		Actions	
	Adaptability (200)	Maintaining effectiveness when experiencing major changes in personal v	work tasks or the work environment; adjusting effectivel	yt. ×	
nger(s)	Building Strategic Working Relationships (Identifying opportunities and taking action to build strategic relationships between one's area and other areas, teams, departments,				
	Adaptability (100)	Maintaining effectiveness when experiencing major changes in personal v	work tasks or the work environment; adjusting effectivel	yt_ ×	
	Applied Learning (100)	Assimilating and applying new job-related information in a timely manner.		×	
	EVALUATION OVERALL SECTION I STANDARD 3 F	POINT SCALE			
	Overall Rating				

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.

	Note	e/Att	ach	mer	ıt		Cancel	Save
								_
lot	е							
в	I	Ū	;=	::				
Press	Alt + F10	to move	to toolbe	ac Press	ALT + 0	for Help.		
Press	Alt + F10	to move	to toolb	ar. Press	ALT + 0	for Help.		
Press	achr	to move	to toolbo	ar. Press	ALT + 0	for Help.	+ Att	achment
Press Atta	achr	nent	10 toolb	a: Press	ALT + 0	for Help.	+ Att	achment
Press. Atta No	achr thing	nent	to toolo :	ac Press	ALT + 0	for Help.	+ Att	achment
Press Atta No	achr achr thing :	nent select	to toolbo : ① od	at Press	ALT + 0	for Help.	+ Att	achment

Tasks

 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

 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.

MCSC EMPLOYEE	USER GUIDE EVAL Due Date: Fri. Dec. 31, 2021				
Position: PE-DEPARTMENTAL ANALYST- A	EVALUATION DETAILS				
Department:	Current Status: Draft				
PE-CIVIL SERVICE COMMISSION	Type: Periodic				
View Org Chart	0				

- 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)

	USER GUIDE EVAL Due Date: Fri. Dec. 31, 2021	
MCSC EMPLOYEE	Print 🔹	
Position: PE-DEPARTMENTAL ANALYST- A	EVALUATION DETAILS	
Department:	Current Status: Before Ratings	
PE-CIVIL SERVICE COMMISSION	Type: Periodic	
View Org Chart	0	

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

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.

OV PE-Task Sign	User Guide-1 for	Due 10/28/2019 Is Assigned to You	
donotreply@neogo Tue 6/9/2020 3:12 PM To: You	v.com		5 <i>"</i> 5
NEOG	ΟV		
Dear Employee I	Name,		
You are receivin	ng this email because yo	ou have a task assigned to you in NEOGOV Perfor	rm:
 Other task period, The rating complete. The acknownian of the acknownian of	is, such as touchpoint m g task is assigned once to owledgement of rating may include a reminder r	teetings and/or cneck-ins, may be assigned as act the acknowledgement of evaluation plan task, and task is assigned once your manager/supervisor r notice and overdue notice emails.	knowledgement tasks throughout the evaluat I any other pre-rating acknowledgement task ates your evaluation plan.
Please use the	link below to login, view,	, and confirm the task(s)and their associated due of	date(s).
Note:You can a	lso access tasks from ye	our dashboard in NEOGOV Perform.	
Subject:	Sign User Guide-1		
Due Date:	10/28/2019		
	23000330700000 mm385		
Priority:	Low		

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 active and in your Tasks section of the dashboard. If you do not acknowledge your evaluation (plan), please follow up with your manager.

Acknowledgment Form				Go to Evaluation Details >
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYST-A		EVALUATION NAME USER GUIDE EVAL	due date Fri. Dec. 31, 2021	
Content				
SECTIONS				Collapse All Sections
Objective Section	OBJECTIVE SECTION STANDARD 3 POINT SCALE Objective Section			Collapse Section
Competency Section				
ALL SECTIONS	Name	Description		
	Add Objective Name Here	Add the description in this box.		
	COMPETENCY SECTION I STANDARD 3 POINT SCALE Competency Section			Collapse Section
	Name	Description		
	Adaptability (200)	Maintaining effectiveness when experienci processes, requirements or cultures.	ng major changes in personal work tasks or the work environment; adjusting effectively to work	k within new work structures,
	Building Strategic Working Relationships (200)	Identifying opportunities and taking action business goals.	to build strategic relationships between one's area and other areas, teams, departments, units,	or organizations to help achieve
	Adaptability (100)	Maintaining effectiveness when experienci processes, requirements or cultures.	ng major changes in personal work tasks or the work environment; adjusting effectively to work	k within new work structures,

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.

NEOGOV 🔡 Dashboard			Q Searc	Skip to Content	Cancel Submit
Employees Library V Help V				-	
Acknowledgment Form				Comments Write comment here	
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYST-A		EVALUATION NAME USER GUIDE EVAL	due date Fri. Dec. 31, 2021		li
				Please sign your name below	
Content		U		Are you sure you wish to acknowledge the plan selecting SUBMIT, I certify that I have reviewed t and/or performance objectives/factors identified	at this time? By the competencies d on this form.
SECTIONS				MCSC EMPLOYE	Æ
Objective Section	OBJECTIVE SECTION STANDARD 3 POINT SCALE Objective Section			MCSC EMPLOYEE	April 23, 2021
Competency Section				Auto-Generate Draw Signature	
ALL SECTIONS	Name	Description			
	Add Objective Name Here	Add the description in this box.			
	COMPETENCY SECTION I STANDARD 3 POINT SCALL Competency Section				
	Name				
	Adaptability (200)	Maintaining effectiveness when experienc	ing major changes in personal work tasks or the work er		

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 reacknowledge 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.

C Search		⑦ 🛱 ♤ 🔗 M MCSC Ma
Dashboard Tasks People Performance	Recruiting Onboard Forms Reports	
State of Michigan		Dashboard ∨
Tasks <u>View All (23)</u>	Quick Actions	People <u>View Team</u>
To-Do (22) Overdue (1)	⅔ Write a Journal entry >	MY MANAGER
Myself My Direct Reports V	♂ View My Requisitions >	MCSC Director
PERFORMANCE • Due Today	♂ View my Forms Quick Links >	MY DIRECT REPORTS
ME Rating for MCSC Employe For MCSC Employee • NEO	♂ View my current evaluation >	ME MCSC Employee 1 Overdue Task
FORMS · Due APPROVAL 04/23/25		

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.

	DASHBOARD	Q Search						?	Ë	¢	⊘ ¹	MM M	CSC Ma
Dash	board Tasks People	Performance	Recruiting	Onboard	Forms	Reports							
JAT	Overview My Evaluat	ions My Team	's Evaluations	Journal H	ub							Journa	l Entry
	My Tasks					My Current	Evaluation				My	Evalua	tions
	RATING	mployee's NEOGO e • NEOGOV UPDA	/ UPDATE EXAI TE EXAMPLE	Due Today MPLE		E NEC Due Before Ratin	DGOV Eval Ex Saturday, Jul	ample y 5, 20	25 Approval				
	EVALUATION Sign NEOGOV Eval For you • NEOGOV	Example for MCSC Eval Example	C Manager	0ue 04/08/25		D My Tea	m's Evalua rions	tions	0			Vie	ew all

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 🖶 Dashboard 🗸	
Employees Performance Evaluations \vee Li	ibrary V Reports V Help V
< Go to Evaluation Details	
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYST-A	JSER GUIDE EVAL
SECTIONS	OBJECTIVE SECTION STANDARD 3 POINT SCALE
Objective Section	Objective Section
Competency Section	
Overall Rating	Add Objective Name Here
E Summary	∽ no comment

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.

Employees Performance Featuritions - Library - Reports -	ů 🖬 + O
C Deviauation Details	t Section > Submit Evaluation
MCSC Employee reconstructive analysis C	K Expand Feedback Entries
Version and give now available Version and give now available Version available Version version Version version version Version version version Version version version Version version version version Version version version version version Version version	_
Competency Section O Example for Guide	
Overall Rating O Requirements for Objective go here.	
Summary RATING SCALE * Shore	w Rating Scale Descriptions. >
Weeds Improvement Weeds Expectations Wigh Performing COMMENTS B B <	

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.

NEOGOV 📰 Dashboard				🔍 Search 🛛 🖸 记 😡 MCSC Manager 🗸
Employees Performance Evaluations ~	Library ~ Re	ports ~		ů B + O
✓ Go to Evaluation Details				< Previous Section Next Section > Submit Evaluation
ME MCSC Employee PE-DEPARTMENTAL ANALYST-A	(«	> Collapse Feedback Entrie	5	Search Feedback Entries
EE UNIFIED DASHBOARD USER GUIDE 3 Overall Rating Score Not Available		Competency Section COMMETENCY SECTION I STANDARD 3 POINT SCALE	I	Reviewer Entries V Journal Entries (9 entries) V Writing Assistant (6 entries) ^
Objective Section	~	* Fields are required.	L	Ham: Adaptability (200)
Competency Section	٥	ITEM 1 0F 2 Adaptability (200)	L	
Overall Rating	0	Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to		No tone NEEDS IMPROVEMENT
E Summary		work within new work structures, processes, requirements or cultures.		Makes active attempts to delay or prevent change from occurring. Fails to implement change as required. Is vocally negative or exhibits negative attitude about change.
		RATING SCALE * Show Roting Scale Descriptions. >		Refuses to learn new concepts. Challenges new work methods/procedures. Avoids complying with new requirements or work situations.
		Needs Improvement Mess Expectations		Devels on how things were done in the past. Lingers in disoriented state when change occurs; has difficulty accomplishing routine tasks. Add to Comment Bas
		High Performing		No tone METS EXPECTATIONS • Maintains quality of work when changes occur in the work environment. • Addresses change with a positive attitude.
		сомилта В і <u>Ц</u> Ал = = = = = = = = = = = = = = = = = =		Understands that changes occur and effectively and efficiently incorporates them into work routine. Exhibits willingness to comply with change. Ouckly modifies behavior to deal with change. Focuses on beneficial aspects of change.
		Type someting		Add to Comment Box

- 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.

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Employees Performance Evaluations - Library - I	Reports 🗸			å ⊞ + ⊙
			C Previous S	ection Submit Evoluation
MCSC Employee PE-DEPARTMENTAL ANALYST-4	()	>> Collapse Feedback Entries	Search Feedback Entries	^
EE UNIFIED DASHBOARD USER GUIDE 3 Overall Rating Score High Performing	Overall Rating (optional) EVALUATION OVERALL SECTION I STANDARD 3 POINT SCALE		Reviewer Entries Journal Entries (9 entries)	×
SECTIONS Complete Come (10) over (1) Objective Section	* Fields are required.			
Competency Section	Overall Rating			
Overall Rating optionof	RATING SCALE *	Show Rating Scale Descriptions. >		
	Needs Improvement			
	Meets Expectations High Performing			
	COMMENTS			
	B / U Ai = = = ¶i co	n a 1		
	Type something			
		-		

- 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.

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Employees Performance Eval	uations ~ Lib	orary V Reports V Help V					1 H + C
ہی C Go to Evaluation Details					Overall Ra	ting Meets Expect	ations Submit Evaluation
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYS	ма ^(®) U	ISER GUIDE EVAL					Print Current State
SECTIONS							Expand all cards ~
Objective Section	~	OBJECTIVE SECTION STANDARD 3 POINT SCALE					
Competency Section	~	Objective Section					
Overall Rating	~						
Summary		Add Objective Name Here	Meets Expectations	E Add comments here			>

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.**

You're almost done!

Are you sure you wish to submit the review at this time? Selecting CONTINUE will prevent any further changes. By selecting CONTINUE, I certify that this rating form constitutes my evaluation of the performance of this employee for the period covered.

MCSC Manager Do you wish to continue?

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

Succ	ess!
	\bigcirc
Your e	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.

Adaptability (200) Mentaneor performances and exequence query darges in personal work status or the work within new work status are processes, requerements or caltures. Ratines SOALE © Needs Improvement © Needs Improvement © Needs Improvement © Needs Improvement Physic Performance Physic Performan	V COMPETENCIES		
Adaptability (200) Materians determines the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in process set, tig data on the specification tip charges in the language charger works.		Overall Rating Meets Expectations	
Press Aller PD to infest to bother. Press All + 5 for Help.	Adaptability (200) Maranang effectiveness when expenses or protonel set RATING SCALE Store descriptions. > Meets Expectations () High Performing	In tasks or the work environment, adjusting effectively to work within new work structures, processes, requirements or outures.	Source Entries 2 entries Source Entries 2 entries Source Entries 2 entries Source Entries 2 entries Source Entries Source Entries Source Entries
		Press At - PD to move to toolker Press, A2 + 0 for Help.	

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.

NEC)GO	V 🚦 Dashboard 🗸						Q Search		i	MCSC MANAGER
Employees Performance Evaluations v Library v Reports v Help v								∴ ∎ +			
Emp	Employee List								III 7 Q		
	Pho	to Q Employee #	Q Last Name	Q First Name	Q Direct Manager	Q Position	Q Position Start Da	Q Online Access	Q Active		Actions
		1111112	EMPLOYEE	MCSC	MCSC MANAGER	PE-DEPARTMENTAL ANALYST-A	05/02/2021	Activated	Yes		G
		1111113	MANAGER	MCSC	MCSC 2ND LINE MANAGER	PE-DEPARTMENTAL MANAGER-3	06/24/2004	Activated	Yes		

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.

DASHBOARD	Q Search		MCSC Employee
Dashboard Tasks People Performance Onboard Form	is Reports		
State of Michigan			Dashboard v
Tasks <u>View All (2)</u>	Quick Actions	People	
To-Do (1) Overdue (1)	♀ Write a Journal entry >	MY MANAGER	
PERFORMANCE • EVALUATION Due 12/31/25	View my Forms Quick Links	MM MCSC Manager	
ME Sign Md R Training 3/12/25 for MCSC Employee For you • MGR Training 3/12/25	View my current evaluation		

- 2. In the **Acknowledgment Form (After Ratings)** window, review the ratings assigned to each objective and 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.

Acknowledgment Form				Go to Evaluation Details >
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYST-A		EVALUATION NAME USER GUIDE EVAL &	due date Fri. Dec. 31, 2021	⊽ Sign
Rating Summary				
MCSC MANAGER PE-DEPARTMENTAL MANAGER-3		Overall Rating Meets Expectations		
SECTIONS				Collapse all sections 🤿
Objective Section	OBJECTIVE SECTION I STANDARD 3 POINT SCALE Objective Section			Collapse Section
Competency Section				
Overall Rating	Add Objective Name Here Add the description in this box.			
ALL SECTIONS	MCSC MANAGER	Meets Expectatio	ns 📃 Add comments here	
	COMPETENCY SECTION I STANDARD 3 POINT SCALE Competency Section			Collapse Section

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

NEOGOV 📰 Dashboard	Q Searc	Sign	Cancel Submit	
Employees Library V Help V				
Acknowledgment Form			Write comment here	
MCSC EMPLOYEE PE-DEPARTMENTAL ANALYST-A	Declaritor Name USER GUIDE EVAL Fri. Dec. 31, 2021		Please sign your name below	li li
Rating Summary			Are you sure you wish to sign the review at this to SUBMIT, I certify that I have had the opportunity to understand that my certification does not necess agree with the rating.	ime? By selecting to review this rating. I arily mean that I
MCSC MANAGER PE-DEPARTMENTAL MANAGER-3	Overall Rating Meets Expectations		MCSC EMPLOYE	E
			MCSC EMPLOYEE	April 27, 2021
SECTIONS			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, 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.

	DASHBOARD	Q Search	0	Ħ	¢	Ø	MM MCSC Manager	
Da	hboard Tasks People Performance Recruiting Onboard	Forms Reports						
UAT								
	Reports							
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	Forms	Onboard						l
	Forms Report	> Onboard Progress					>	
	Overall Process Status Report	> Offboard Progress					>	
	Process Task Status Report	> Preboard Progress					>	
	Custom Process Status Report	> Checklist Progress					>	
	Approval Task Status Report	> Task Status					>	-
							Common I. Data an area	

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.

@ D	Default x Bulk Actions								
	Task Assignee(s) 🗘	Department ‡	Department Code 🗘	Related to ÷	Subject \$	Priority 💲	Status ‡	Due Date 👻	
	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Rating For MCSC EMPLOYEE's MDOT TRAINING	Low	Completed	04/14/2022	
	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Sign MDOT TRAINING for MCSC EMPLOYEE	Low	Completed	04/14/2022	
	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation with Checkin	Rating For MCSC EMPLOYEE's Evaluation with Checkin	Low	Pending	01/31/2022	
	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Evaluation with Checkin	Sign Evaluation with Checkin for MCSC EMPLOYEE	Low	Pending	01/31/2022	

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.

NEOGOV 🚦 Dashboard 🗸		Q Searc	Skip to Content Columns Done
Employees Performance Evaluations \checkmark Library \checkmark Reports \checkmark	Help 🗸		
		5	Task Assignee(s)
0 O Task	Rater Approver	Acknowledger	Department
	Task Type		🔢 🚫 Department Code
			Eleated to
Default	¹ _m		II 🚫 Subject
Task Assignee(s)	Department Code	\$ Subject	II 🔗 Priority
MCSC MANAGER PE-CIVIL SERVICE COMMISSION	PE-1901 Evaluation MDOT TRAINING	Rating For MCSC EMPLOYEE's MDOT TR	🗄 📀 Status
MCSC EMPLOYEE PE-CIVIL SERVICE COMMISSION	PE-1901 Evaluation MDOT TRAINING	Sign MDOT TRAINING for MCSC EMPLO	II 🕗 Due Date

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

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mployees Performance Evaluations v Library v Reports v Help v 🖞 🗐 + 🕑									
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⊕ Default 🛠 Bulk Actions									
Task Assignee(s) Department	Department Code	Related to	Subject	Priority Status Click to open advanced filtering for this list					

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

NEOGOV 🔡 Dashboard		Filters	Close
Employees Performance Evaluations v Library v Reports v			
	Generate Report		Add a Filter
125		* Fields are required.	Clear All $ \times $
		* A Field is required	
g 0.75		Select one	^ ×
		Task Assignee(s)	
2 05		Department	1
0.25		Department Code	
٥ - 8	ô	Related to	
Task	Rater Approver Task Type	Subject	
	On Time Overdue O Total		
🗊 Schedule Exports 🖉 🕁 Default 🖉 Bulk Actions			
1 record(s) are selected.			
✓ Tesk Assignee(s) ₽ Department ₽ Department Code	© Related to ©	Subject	
MCSC Employee PE-CIVIL SERVICE COMMISSI PE-1901	Evoluation TEST VERTICAL RATING FORM	Sign TEST VERTICAL RATING FC	

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**.

Filters		Done
Add a Filter		
* Fields are required.	Clear All	×
Due Date	~	
• is	~	~
• 12/31/2021		^
Apply Filter		

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

⊕ Default ☆ Bulk Actions								
	Q Task Assignee(s)	Q Department	Q Department Code	Q Related to	Q Subject	Q Priority	Q Status	Click to toggle search fields for columns on this
	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Rating For MCSC EMPLOYEE's MDOT TRAI	Low	Completed	04/1, list - Current state search mode
	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Sign MDOT TRAINING for MCSC EMPLOYEE	Low	Completed	04/14/2022

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**.



NEO	GOV 🔡 Dashboar	d ¥				Q Searc	Skip to Content	Done
Employe	es Performance Evaluations	\sim Library \sim Reports \sim	Help 🗸			_	EXPORT ACTIONS	
c	0			0			Export to PDF	PDF
	14	58	Kater	Task Typ	e a	Duriowiedger _	Export to Excel	NLS.
				On Time Overdue	O Total		Export to CSV	CSU
@ De	efault 🦨 Bulk Actions							
10	records are selected.							
	Q Task Assignee(s)	Q Department	Q. Department Code	Q Related to	Q Subject	Q, Prio		
	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Rating For MCSC EMPLOYEE's MDOT TRAI	Low		
	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation MDOT TRAINING	Sign MDOT TRAINING for MCSC EMPLOYEE	Low		
	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Evaluation with Checkin	Rating For MCSC EMPLOYEE's Evaluation wi-	Low		

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.**

NEOGOV	📰 Dashboard 🗸			Q Searc	Custom Views Done
Employees Perfo	rmance Evaluations $ arsigma $ Library $ arsigma $ Reports	✓ Help ✓			
0	0		0	5	Create New View
	Task	Rater	Approver Task Turn	Acknowledger	
			On Time Overdue O Total		Default A Default
Default	f Bulk Actions				
 O Task 	Assinnee(s) O Department	O Department Code (Related to O Subject	O Prio	

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

Custom View Editor	Cancel Save
Fields are required.	
Name TESTING DEFAULT 2	
Make my default	

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



	🗓 Schedule Exports) 💿 TESTING CUSTOM									
•	Ta ssignee(s) 🗘	Department \$	Department Code \$	Related to \$	Subject ÷	Priority 🗘	Status 🗘	Due Date 🔹		
	Q. Seach	Q Search	Q Search	Q. Search	Q. Search	Q Search	Q Search	Q Search		
	MCSC Employee	PE-CIVIL SERVICE COMMISSI	PE-1901	Evaluation TEST VERTICAL RATING FORM	Sign TEST VERTICAL RATING FORM for MCSC Employee	Low	Completed	09/04/2024		
Fin	First Previous 1 Next Last 10 V Rems per page Showing St of Taers									

- 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**.