

Perform Manager Guide

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Overview

This guide details how to navigate the system as a Manager, covering how to rate evaluations, complete various tasks, and run reports, as well as some tips and tricks of the system.

Before You Use This Guide

Your HR Admin must send you an activation link to activate your account. Once activated, you may log into your Perform account and complete any tasks assigned.

Who Should Use This Guide

This guide is intended for Managers.

Contacts for Questions

Please contact your HR Administrator should you have any additional questions.

Navigating the Dashboard


The Perform Dashboard is the central landing page of Perform, where system tasks and records can be accessed.




Navigating to the Dashboard

Upon logging into Perform, you arrive at your **Dashboard**.

The screenshot shows the NEOGOV Perform Dashboard. At the top, there is a navigation bar with tabs: Dashboard, Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help (1). A search bar and user profile (Belen Zuniga) are also present. Below the navigation bar is a 'My Tasks' section (2) with a summary bar showing 7 Total tasks, 2 Rating, 1 Approve And Sign, 1 Sign, 1 Approve, 2 Other, and 1 Overdue. A table below lists tasks with columns for Task, For Employee, Related To, and Due Date. Below the table is a 'My Evaluations' section (3) with two evaluation cards. At the bottom is a 'My Direct Reports' section (4) with three employee cards. A 'Quick Navigate Menu' (5) is located in the top right corner.

Figure 1: Dashboard

1. **Dashboard Menu:** Based on HR Configuration you see the following tabs:
 - a. **Dashboard:** Brings you to the Dashboard at any time
 - b. The **Employees List**
 - c. The **Performance Evaluations List**
 - d. The **Library** houses the Goal and Competency Lists (based off security permissions)
 - e. **Reports**
 - f. **Help**
2. **My Tasks:** Contains all tasks currently requiring your action
 - a. Color-coded boxes located within this section can be used to filter the various task types
3. **My Evaluations:** Displays your three most recent performance evaluations (if applicable)
 - a. Selecting the View All Link redirects you to your Talent Profile
4. **My Direct Reports:** All of your Direct Reports
5. **Quick Navigate Menu:**
 - a.  **Upload Icon:** Upload a document to your Talent Profile (security permissions apply)

- b.  **Journal Hub:** Contains all Journal Entries that you have created or that have been shared with you, as well as any pending entries and Drafts
 - c.  **Quick Add:** Actions vary depending on security permissions
 - d.  **Recent:** Quick links to recently viewed areas
6. **My Profile:** Access your Talent profile, update your password, and sign out of Perform

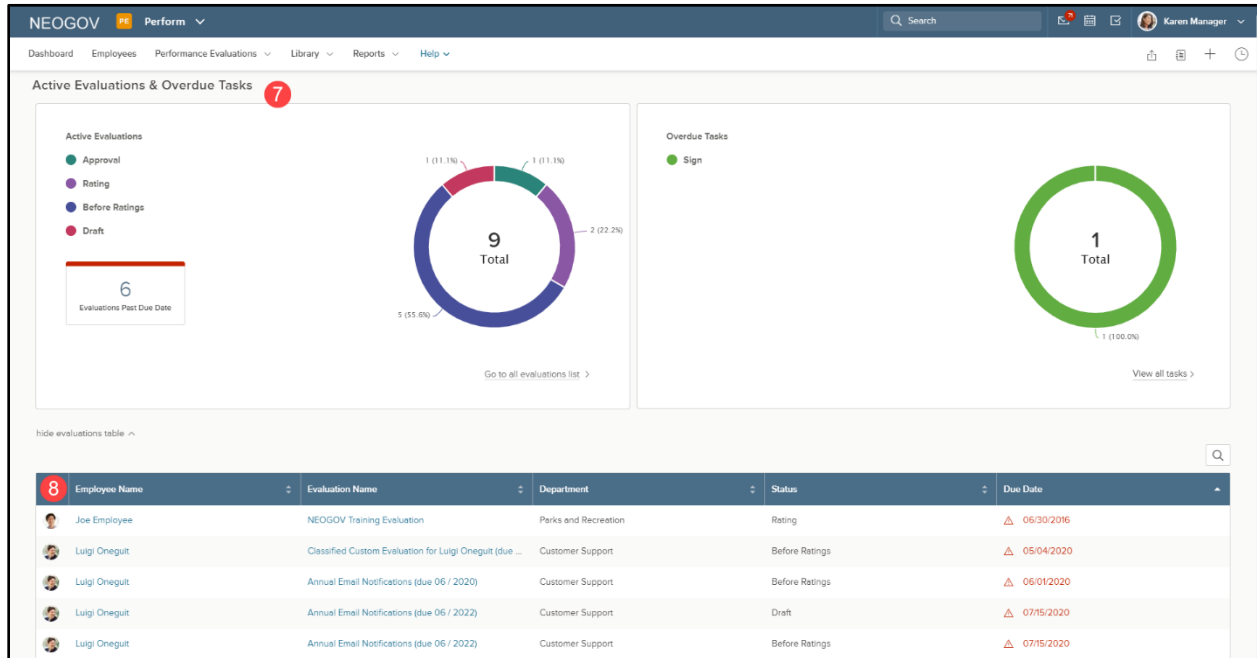


Figure 2: Dashboard (Part II)

- 7. **Active Evaluations and Overdue Tasks:** Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and you (dependent on permissions configured by HR)
- 8. **Active Evaluation and Overdue Tasks List:** Updates to reflect the corresponding information selected on the graphs above

In-App Help

Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

Using In-App Guides

There is a **Help** menu accessible to all users. Hover over the Help icon to view a list of common actions.

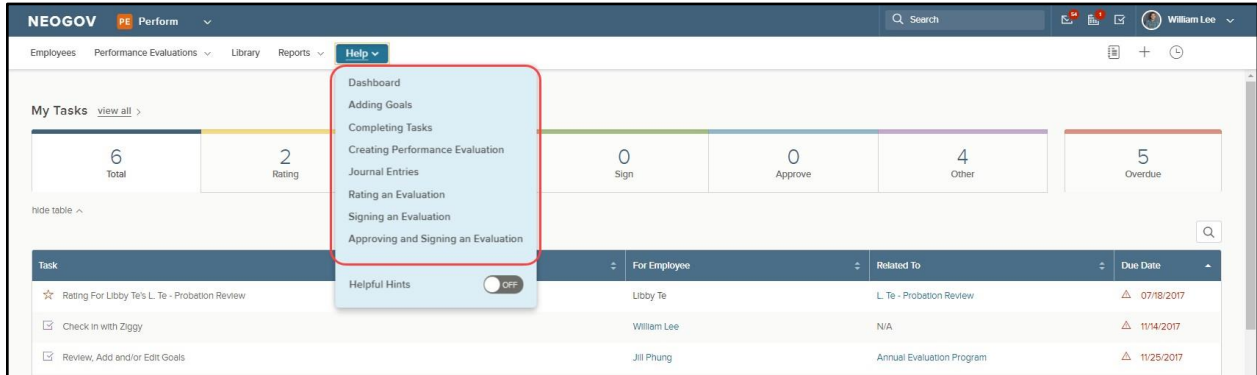


Figure 3: Help Menu

Users can click on an action, and the system guides them on the relevant steps to complete that action, as well as provides a helpful description for each step. When a corresponding tutorial exists, that displays as an option to view also. Select **Stop Guide** to stop the guided tour completely.



Figure 4: Stop Guide

When a tutorial begins to play, it is anchored in the bottom left of the screen. You can change this placement by selecting the drop-down menu in the top left of the tutorial.

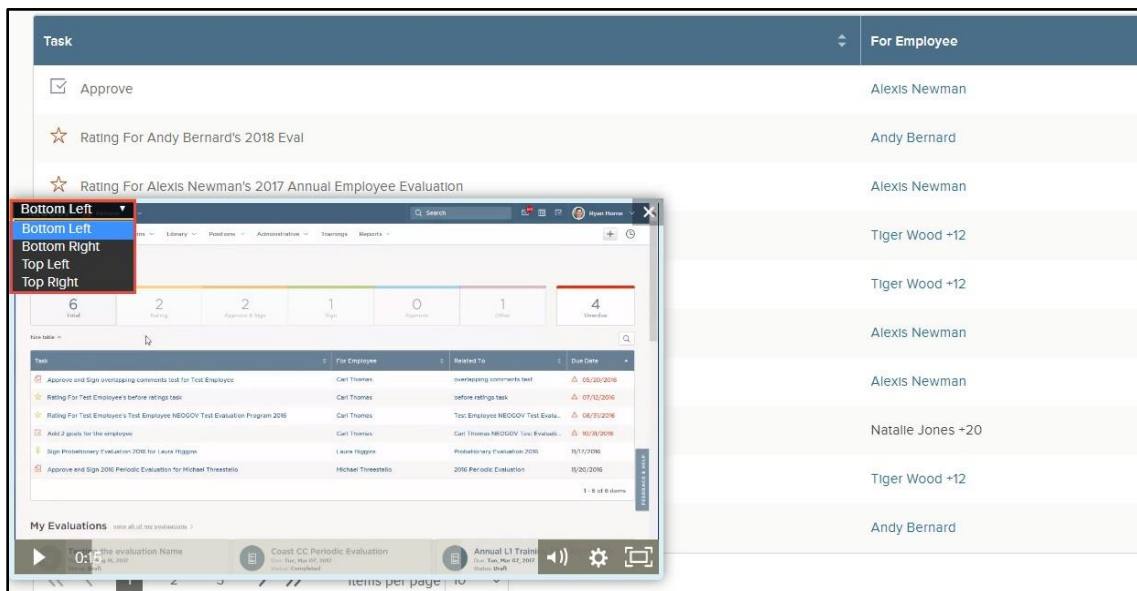


Figure 5: Tutorial Placement

NOTE: If you leave the page playing a tutorial, the tutorial closes and will need to be reopened if you wish to watch it on the next page.

Using Helpful Hints

When you hover over the **Help** icon, there is a **Helpful Hints** toggle that can be enabled or disabled.

If Helpful Hints are enabled, blue Helpful Hint icons display throughout Perform in areas where users might need more assistance.

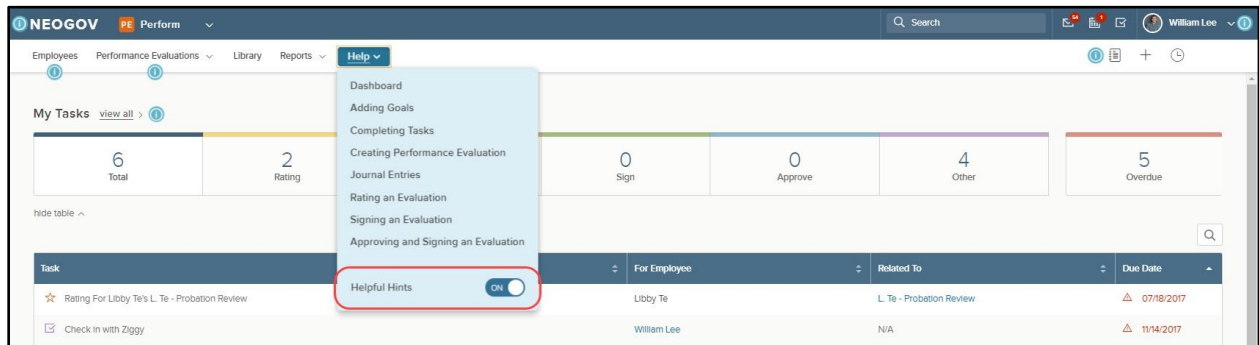


Figure 6: Helpful Hints

Click on a Helpful Hint to receive more information about that specific action. Depending on the Helpful Hint, the system may refer the user to other related hints, or it may offer a description and the corresponding tutorial (if applicable). View the tutorial by selecting **Watch Video** or close the Helpful Hint description by selecting **Close**.

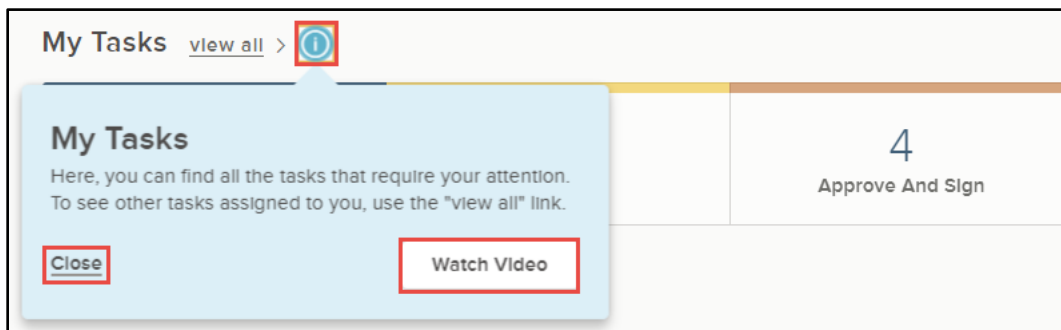


Figure 7: Watch Video

To turn off the Helpful Hints, hover over the Help icon and disable the Helpful Hints.

My Tasks

Any current tasks that require your action appear in **My Tasks**. You can filter on each status by selecting a task type. The list below will then only show tasks of that type.

The screenshot shows the 'My Tasks' interface. At the top, there is a summary bar with the following counts: 7 Total, 2 Rating, 1 Approve And Sign, 1 Sign, 1 Approve, 2 Other, and 1 Overdue. Below this is a table with 7 tasks. The table has columns for Task, For Employee, Related To, and Due Date. The tasks are:

Task	For Employee	Related To	Due Date
Sign Annual Belen Zuniga (due 08 / 31 / 2021) for Belen Zuniga	Belen Zuniga	Annual Belen Zuniga (due 08 / 31 / 2021)	03/27/2021
Manager Add Goals to the Current Evaluation Period	Isaac Tran	Annual Isaac Tran (09 / 13 / 2021)	04/14/2021
Manager Add Goals to the Current Evaluation Period	Elisabeth Sandberg	Annual Elisabeth Sandberg (08 / 03 / 2021)	04/14/2021
Approve and Sign Annual Josh O'Neill (07 / 28 / 2021) for Josh O'Neill	Josh O'Neill	Annual Josh O'Neill (07 / 28 / 2021)	07/18/2021
Rating For Jennifer Smith's Annual Jennifer Smith (09 / 02 / 2021)	Jennifer Smith	Annual Jennifer Smith (09 / 02 / 2021)	08/18/2021
Rating For Jessica Ortega's Annual Jessica Ortega (09 / 13 / 2021)	Jessica Ortega	Annual Jessica Ortega (09 / 13 / 2021)	08/29/2021
Approve Annual Alan Wilson (09 / 13 / 2021) for Alan Wilson	Alan Wilson	Annual Alan Wilson (09 / 13 / 2021)	09/03/2021

Showing 1 - 7 of 7 items

Figure 8: My Tasks

1. **View All:** Select this to view tasks that are Current, Completed, Canceled, Pending, and Skipped
 - a. **Current:** Tasks currently requiring action
 - b. **Completed:** Tasks you've already acted on
 - c. **Canceled:** Tasks no longer required
 - d. **Pending:** Tasks pending another user's action, or tasks for *Draft* evaluations
 - e. **Skipped:** Tasks that had been assigned to you, but skipped by an HR Admin
2. To **complete a task**, select the name to be re-directed to the task
 - a. For more information, please refer to [Completing Tasks](#)

The task types are designated as follows:

- **Total:** All tasks currently requiring your action
- **Rating:** Any rating required on a self-evaluation, a Direct Report's evaluation, a peer rating task, recurring Journal Entry tasks, and Check-Ins (one-time or recurring)
- **Approve and Sign:** Task to approve and sign the evaluation after it's been rated
- **Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated
- **Approve:** Task to approve the evaluation after it's been rated
- **Other:** Any manual task (one-time or recurring) and Add / Edit Content tasks
- **Overdue:** Any task with a past due date

The following legend can be used to identify actions that can be taken from the Dashboard:







	= Rate an evaluation
	= Approve and sign
	= Sign
	= Approve an evaluation
	= Other or Manual tasks
	= Recurring Manual task
	= Check-In
	= Recurring Journal Entry

Figure 9: Task Icon Legend

My Evaluations

Underneath the tasks section of the Dashboard is the **My Evaluations** section. Here are your three most recent performance evaluations (if applicable). Select any one of the evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation. If the evaluation status is Completed, you are directed to the Evaluation Print Preview.

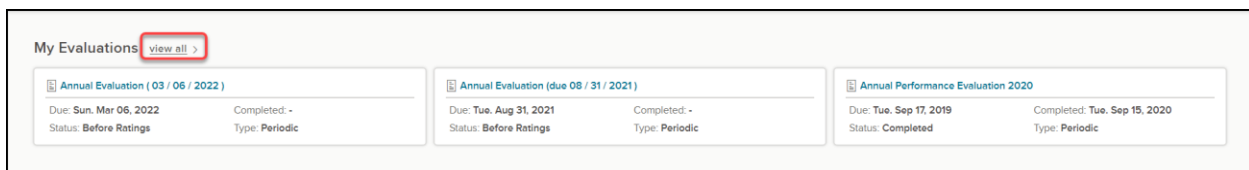


Figure 10: My Evaluations

To view all historical evaluation, select **view all of my evaluations**. To view the Print Preview of a specific completed evaluation, select the title of the evaluation.

My Direct Reports

Below your evaluations section is **My Direct Reports**, a listing of your direct reports.

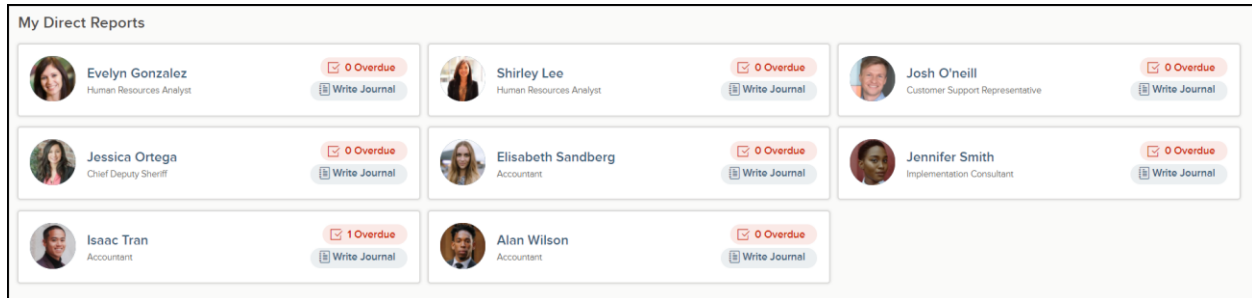


Figure 11: My Direct Reports

Click on the name of your direct report to be re-directed to their Talent Profile page. Additionally, you can click into their overdue tasks by selecting the **Overdue** button, or their Journal Entries by selecting the **Write Journal** button, and a flyout appears for the respective item.

Active Evaluations and Overdue Tasks

The next section is the **Active Evaluations and Overdue Tasks** (dependent on security permissions configured by HR).

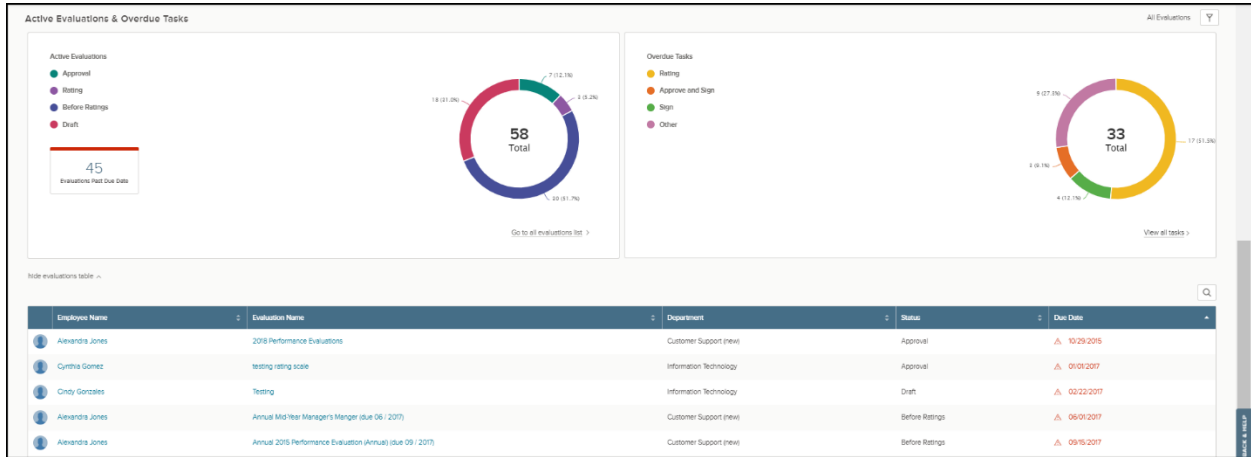


Figure 12: Active Evaluations and Overdue Tasks

The **Active Evaluation Graph** is divided by four statuses: *Approval*, *Rating*, *Before Ratings*, and *Draft*. Click on any respective part of the graph to filter the list below.

The **Overdue Tasks** graph displays the number of overdue evaluation tasks divided by the four statuses: *Rating*, *Sign*, *Approve* and *Sign*, and *Other*. Select the graph for a flyout containing the list of all overdue tasks.

To hide the list, select the **hide evaluations table** button. Use the **Magnifying Glass** icon to filter any column.

Journal Hub

All managers have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you).

For more information, please refer to

Journal Entries.

My Profile (Talent Profile)

To access your **Talent Profile** page, hover over your name in the top right corner and select **My Profile**.

Figure 13: Talent Profile

1. Header tabs may include **Employee Details**, **Evaluations**, **Additional Info**, **Tasks**, **Development Plans**, and **Documents** that are associated to you
 - a. To navigate to each section, select the section title at the top, or scroll down the page
2. Upload a Document to your Talent Profile (if configured by HR)
 - a. Maximum file size of 20MB
3. Add **Journal Entries** from this button
 - a. For information, please refer to

- b. [Journal](#) Entries
4. Add information to widgets
5. View your immediate **Hierarchy**
 - a. To view the entire agency org chart, select **View Company**



You cannot edit any of your Employee Information, such as position, email address, etc. If you need to update that information, please contact your HR Administrator

Based on HR configuration, you can add information to different informational widgets under the Employee Details section. For example, to add information to the Work History widget, select **+ Add Work**.

The Add Work History flyout appears. Any field highlighted in red is required; you must fill out those fields to save. Enter in all information and save.

Figure 14: Add Work History

Once saved, the new information populates your employee details section. Continue to add information in the same fashion to any widget as desired.

Figure 15: Work History

Document Upload (Optional)

If configured by HR, Managers can upload documents to their Talent Profile as well as upload documents to any of their direct reports' Talent Profiles. This can be helpful if previous paper evaluations or supporting documentation should be included on the Talent Profile page.

If document upload is enabled, the **Upload icon** appears in the quick navigation menu next to the Journal Hub icon.

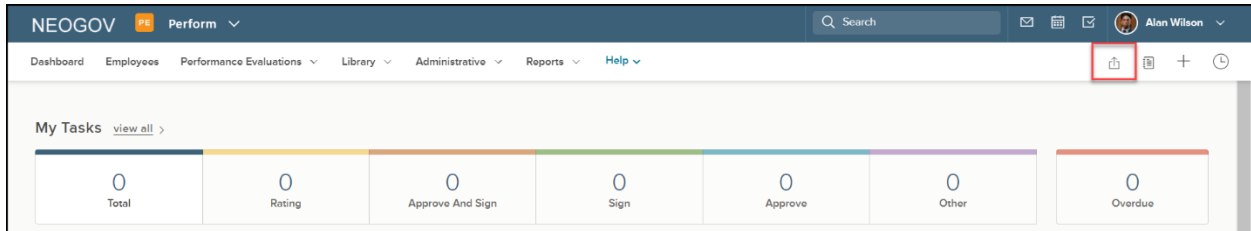


Figure 16: Upload Document Icon – Dashboard

Click the upload icon to open the Upload Document fly-out.

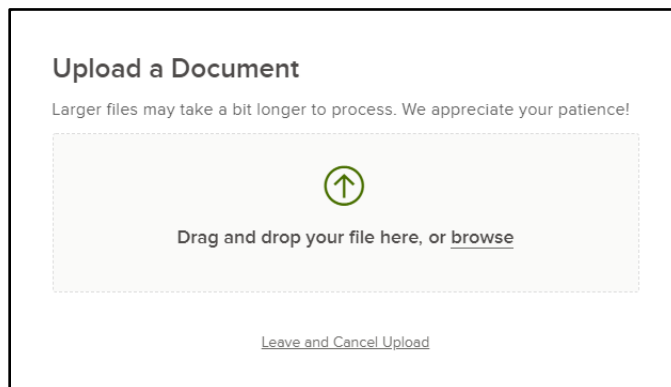


Figure 17: Document Upload Fly-Out

Click **browse** to search your computer for the appropriate file or drag and drop the file into the designated upload area. The maximum file size is 20MB. Once the upload is complete, a success message appears.

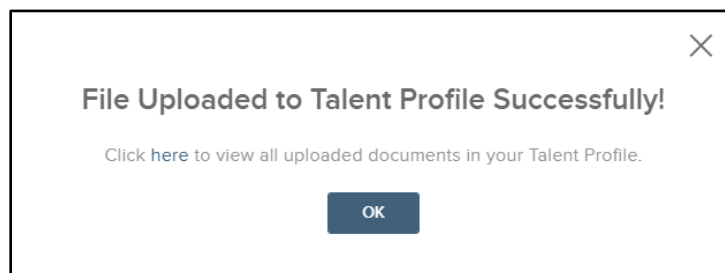


Figure 18: Upload Success Message

Click **OK** to view the document in your Talent Profile

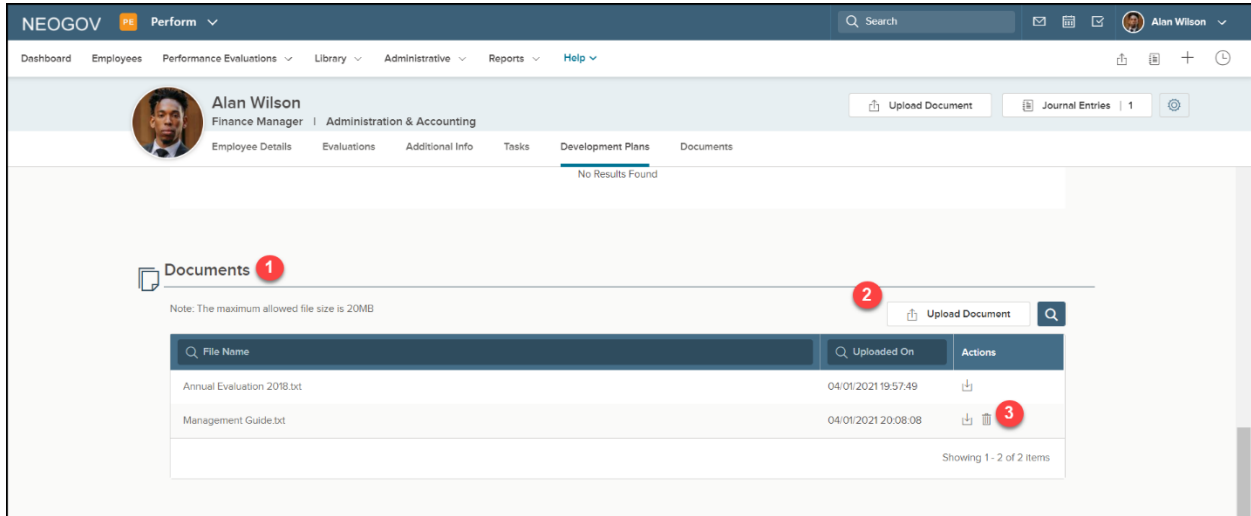


Figure 19: Talent Profile > Documents

1. **Documents Section:** Displays all Documents uploaded to your Talent Profile by you, your manager, or HR.
2. **Upload Document:** Click to upload another document
3. **Actions:**
 - a. Download the corresponding document to your computer
 - b. Delete the corresponding document from your Talent Profile. Note you can only delete items that you personally uploaded

To upload documents for one of your direct reports; navigate to their Talent Profile and click the **Upload Document** button next to the Journal Entries button.

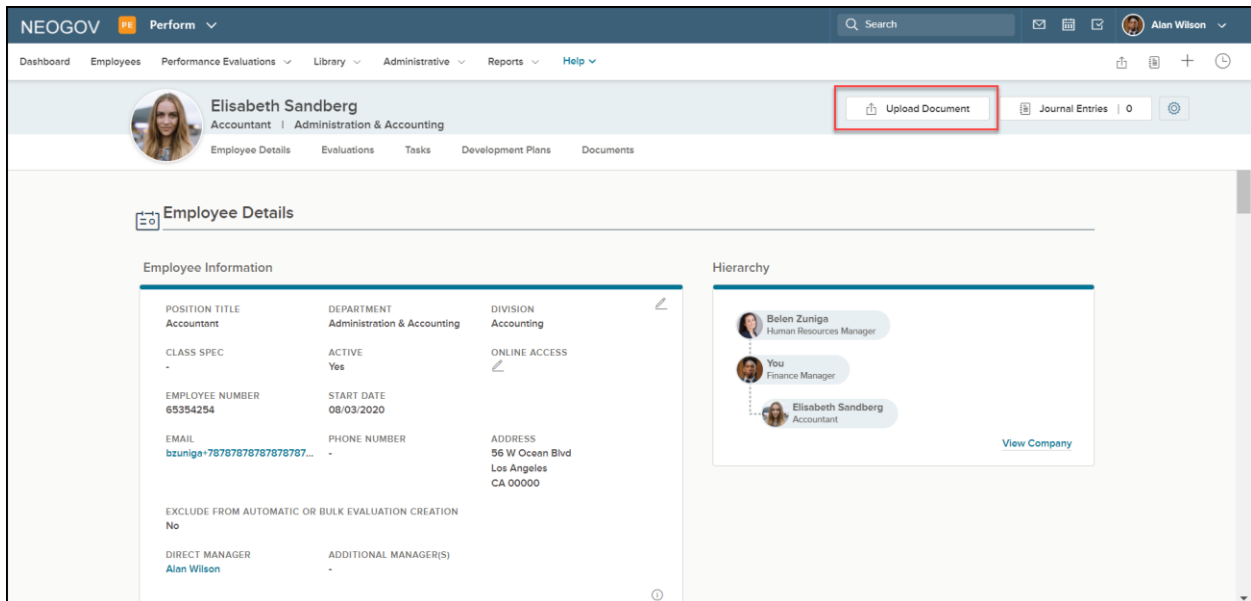


Figure 20: Direct Report > Document Upload

This opens the Upload Document Flyout. From here you can follow the same steps as you did when uploading a document to your own Talent Profile.

Journal Entries

Journal Entries are an easy and effective way to take notes of accomplishments throughout the year for yourself, your direct reports, and potentially other employees (depending on HR configuration).

Navigating to Journal Entries

There are several ways to log Journal Entries in Perform. They can be created from the **Journal Hub**, from the **Dashboard**, and from the **Talent Profile**. They can even be **emailed** directly to Perform!

Adding Journal Entries via the Journal Hub

All managers have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you).

The Journal Hub icon is always accessible to the user, no matter what page they are viewing in Perform.

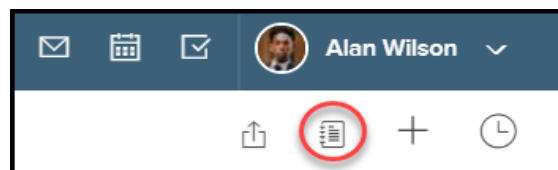


Figure 21: Journal Hub

Select the Journal Hub icon and a flyout displays the **Journal Entries Hub**.

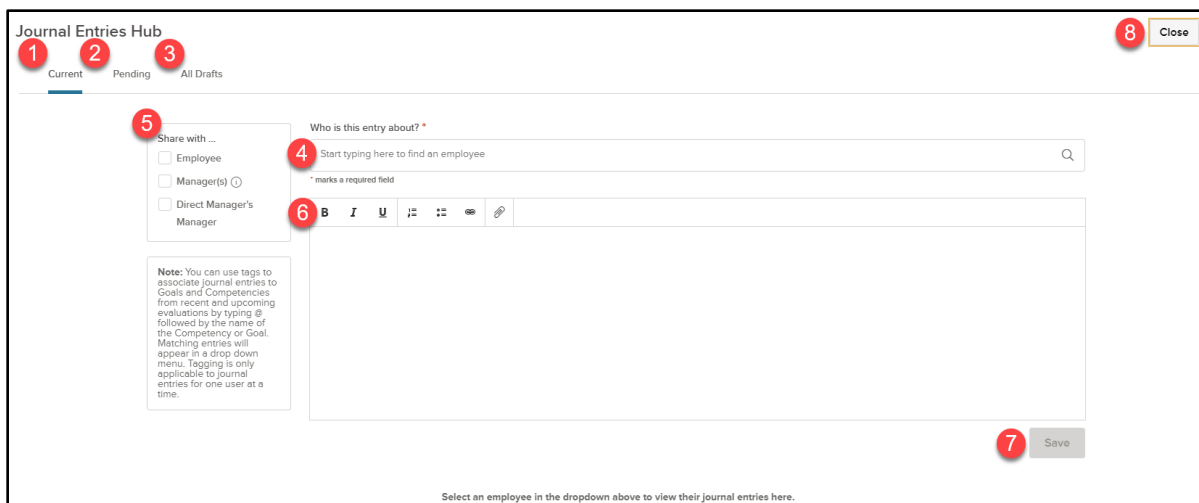


Figure 22: Journal Entries Hub Flyout

1. **Current:** Any Journal Entries successfully posted can be found in the Current tab
2. **Pending:** Any *emailed* Journal Entries that have not been successfully posted can be found and corrected in the Pending tab

- a. Once corrected, the Journal Entry is posted to the Current tab
3. **All Drafts:** Any Journal Entries kept as drafts or not successfully posted can be found and finalized in the All Drafts tab
4. **Who is this entry about?:** Search for any employees you would like to create a Journal Entry for, including yourself or any direct reports
 - a. Once one or more employees are selected, any posted Journal Entries you have access to display at the bottom of the hub
5. **Share with...:** Select any combination of options to quickly share the entry upon saving with the:
 - a. Target Employee
 - b. Manager(s) – NOTE: if there are any Additional Managers assigned to the Employee, the journal will be shared with them as well
 - c. Direct Manager’s Manager
6. **Body of Journal Entry:** Enter the text of your Journal Entry here
 - a. The rich text editor can be used for additional formatting and *one (1) attachment* can be included (5MB)
7. **Save:** Select Save to post the Journal Entry
8. **Close:** Select Close at any time to close the flyout and return to the previous page
 - a. Any unsaved Journal Entries are lost

Logging a Journal Entry from the Journal Hub offers you several options as well as the Journal text box.

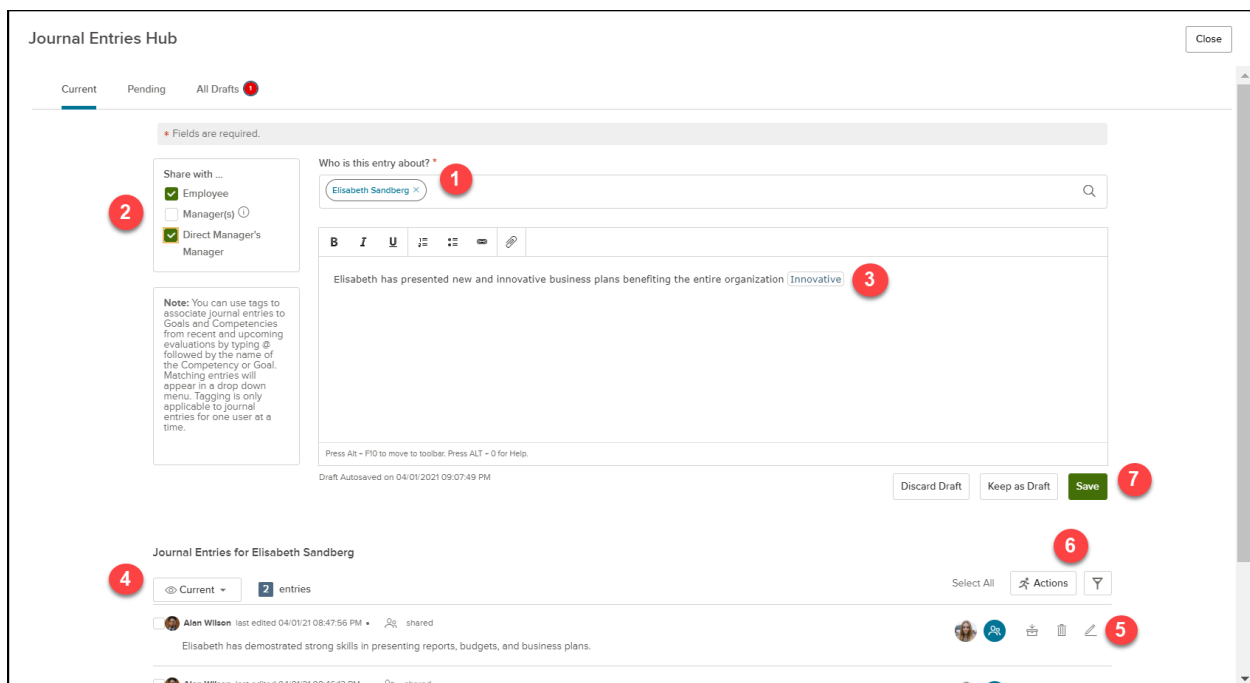


Figure 23: Creating a Journal Entry

1. Enter the **name(s)** of the employee(s) for whom you would like to create a Journal Entry
 - a. Any Journal Entries you have access to for that employee displays below
2. Select if you would like to **share** the entry with the Employee, their Manager(s), or their

Direct Manager's Manager. Not selecting an option, keeps the Journal private to the creator

3. Use the **Rich Text Editor** to enter the Journal Entry and style as necessary
 - a. You can add one (1) attachment to each Journal Entry
 - b. To tag a **Competency, Goal, or Narrative**, enter '@' and type the desired competency, goal or narrative. A list of matching items appears. Select the correct item. This assists in searching for this particular Journal Entry when rating
 - c. Perform continuously saves your work as a **Draft** while you type
4. Use the menu to toggle between **Current, Archived, and Draft** entries
5. You can **share, archive, delete** and **edit** your entries
 - a. To **share**, select the blue **People icon**
 - i. Share Journal Entries created for your Direct Reports with that direct report and your manager
 - ii. You can share Journal Entries created for yourself with your Manager and your Direct Manager's Manager
 - iii. The default setting allows sharing up to two levels in the organizational hierarchy
 1. If HR has configured to allow Journal Entries to be shared with others, you may see further sharing options available
 - b. **Archive** a Journal Entry by selecting the **Archive icon**. Using this feature removes older journal entries from view, making it easier to search through current feedback entries
 - i. Once archived, the entry moves from your current list to the archived list. The archived entry no longer appears for selection in the rating form
 - ii. To unarchive, select the unarchive icon **Unarchive Icon**
 - c. To **delete** any entries you created, select the **Trash icon**
 - d. To **edit** your entry, select the **Pencil icon**.
6. Use the **Actions** menu to **Archive, Delete, Print with Attachments, and/or Print without Attachments**
7. Choose whether to **Discard Draft, Keep as Draft, or Save** your entry
 - a. To wipe all selections and text from your in-progress entry and start fresh, select **Discard Draft**
 - b. To keep your progress and finalize later, select **Keep as Draft**. Access any drafts from the **All Drafts** tab to finalize
 - c. Once you have added all comments, attachments, and tagged evaluation items, select **Save**



Archived Journal Entries can be unarchived from the Archived Tab

Managing Journal Drafts

Users with access to create Journal Entries can save any in-progress entry as a draft to be completed later. The system will auto save all entries as a draft upon typing in the Rich Text Editor until the finalized entry is submitted.

This prevents the accidental loss of entries should the user experience any technical difficulties or accidentally close out of the Journal feature prior to saving. To finalize any draft and submit as a Journal Entry select the **All Drafts** Tab.

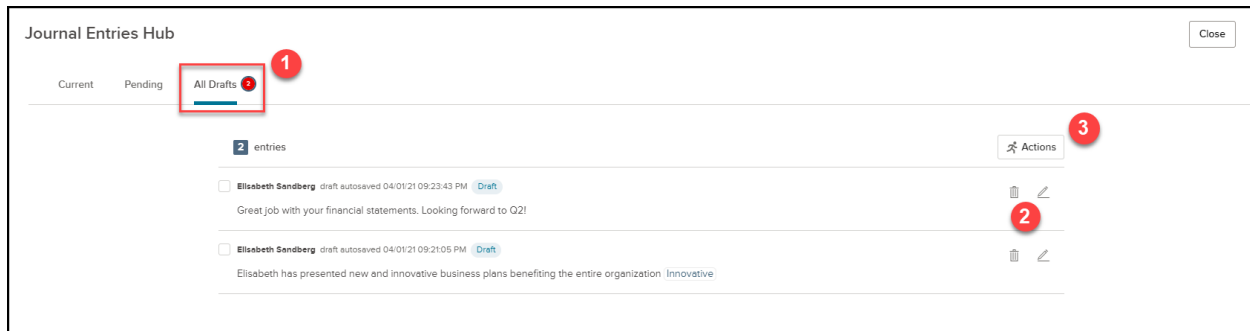


Figure 24: All Drafts Tab - Journal Hub

1. The number of Drafts display on the All Drafts tab in the Journal Hub
2. Select the edit pencil icon to edit and submit a draft or the trashcan icon to delete the draft
3. Entries can be deleted in bulk using the check boxes and Actions button

If existing Journal Entries are edited, the User can choose to keep the in-progress version as a draft. In this instance the original saved entry remains visible until the draft is submitted as a finalized entry. Click on **View Draft** to see the in-progress draft of the saved Journal Entry, finalize, and submit.



Figure 25: View Draft > Journal Hub

Once the Draft is submitted, the original entry is replaced, and the edited time stamp is updated.

Adding Journal Entries via Email

Users with access to create Journal Entries can do so simply by sending an email. Instead of logging into Perform to create Journal Entries, users can send an email, and its contents automatically create as a Journal Entry within Perform.

This is very useful for managers and employees who work in the field and cannot log into Perform regularly, as they can easily create Journal Entries by sending emails from their smartphones.

Employees must send the email from the email address that is used for their Perform account.

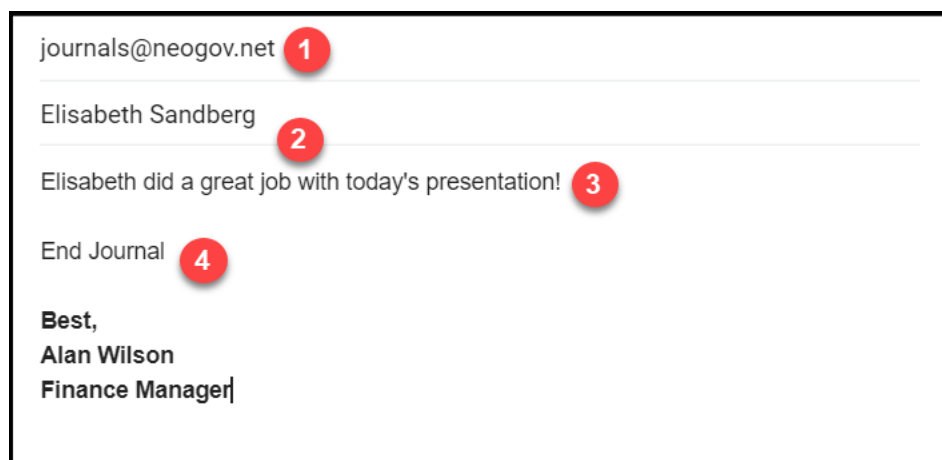


Figure 26: Emailing Journal Entry

1. The email must be sent to **journals@neogov.net**
2. The email's subject/title should only include the name of the employee for whom the Journal Entry is being created. The spelling of the employee's name must match the spelling of it in Perform
3. Whatever is written in the body of the email automatically creates as a Journal Entry once the email is sent
4. Enter the phrase "End Journal" after the last sentence in the email.
 - a. This prevents any signature lines from being added to the Journal Entry once created
 - b. "End Journal" is not visible in the Journal Entry once it is created



There can only be one (1) attachment in the email, which becomes a part of the Journal Entry once created in the system

NOTE: You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

Currently, the tagging and sharing features are not supported while sending the email. However, once the Journal Entry is created, the tagging and sharing actions can be taken within Perform.

Once the email is sent, the Journal Entry is created in Perform and is accessible from the Journal Hub. Any Journal Entries that are error free when emailed automatically post and are available in the **Current** tab.

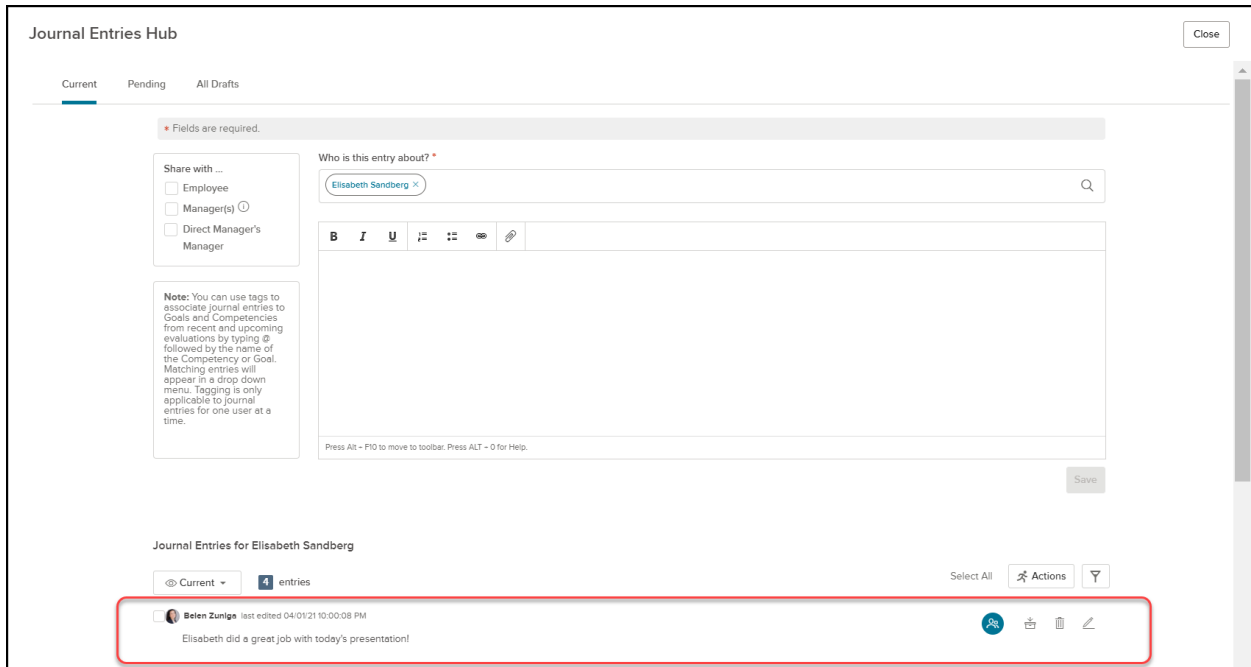


Figure 27: Current Tab - Journal Hub

Any Journal Entries that contained errors when emailed display in the **Pending** tab. Journal Entries within the Pending tab have not been successfully posted yet. Once the errors are corrected, the entry is successfully posted to the Current tab. The error is listed next to each Journal Entry with the ability to correct it.

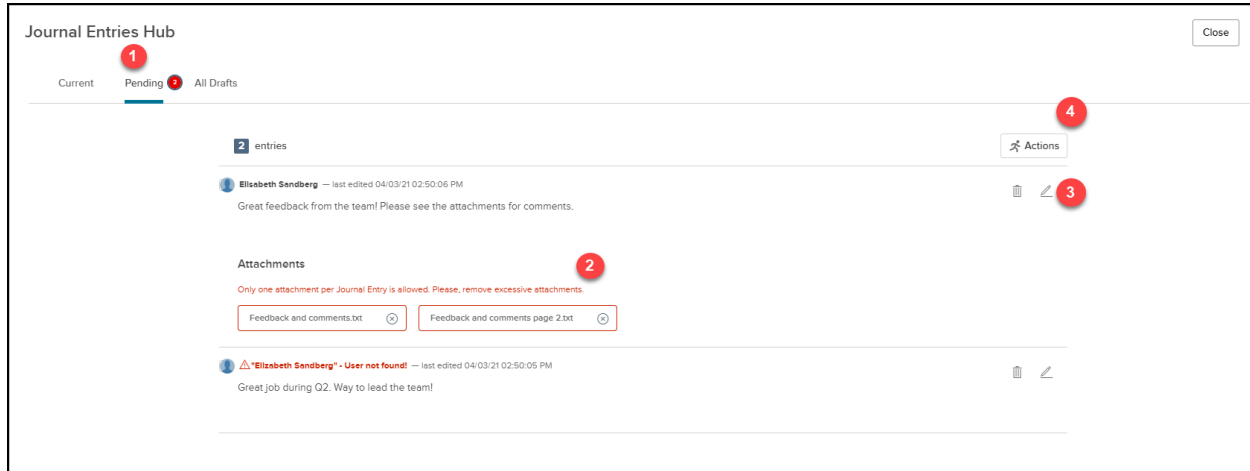


Figure 28: Journal Hub - Pending Tab

1. The **number of pending Journal Entries** display on the Journal Hub icon from the dashboard and the Pending tab
2. The **error message** for each pending Journal Entry appears
 - a. All possible errors are listed below
3. Select the pencil icon to edit or **correct** a pending Journal Entry. Select the trash can icon to delete a pending Journal Entry
4. Pending Journal Entries can be **deleted** in bulk using the Actions tab and checkboxes per entry

There are six different types of errors. Each error generates a bounce back email (with the exception of one), which lets the employee know what the error is and how to correct it. The bounce back email includes a link to the employee's Journal Hub.

NOTE: Please do not reply to the bounce back emails.

The 6 types of errors are:

1. **User Not Found** - when the name of the employee in the subject/title does not match an employee's name in Perform
2. **Unsupported Attachment Format** - when Perform does not support the format of the attachment submitted with the email
3. **More Than One Attachment** - when multiple attachments are sent with the email, since only one attachment per Journal Entry is allowed
4. **More Than One Employee Having the Same Name** - when there are multiple employees in Perform with the same name as the employee in the email's subject/title
5. **Security Restriction** - when the person who sent the email does not have access to create a Journal Entry for the employee in the email's subject/title
6. **Email Address of the Sender Does Not Exist** - when the sender's email does not

exist in Perform the journal is not created. **No bounce back email** is sent to the invalid sender

Once the pending Journal Entry is corrected, it posts and is made available within the Current tab.

Adding Journal Entries via the Dashboard

You can create Journal Entries for your direct reports via the **My Direct Reports** section on your dashboard.

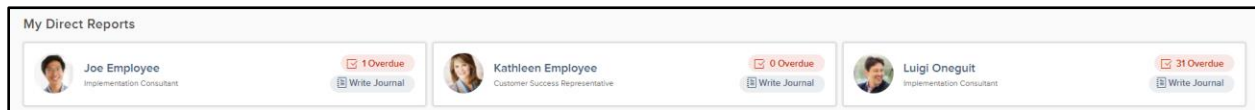


Figure 29: My Direct Reports

Select the blue **Write Journal** icon for the direct report you would like to create a Journal Entry for. A flyout appears with all Journal Entries you have created for that employee previously, and any that have been shared with you about them.

Adding Journal Entries via the Talent Profile

Navigate to the desired employee’s **Talent Profile** page by selecting their name on the Employee List.

From your direct report’s **Talent Profile**, select the **Journal Entries** button, in the top right corner.

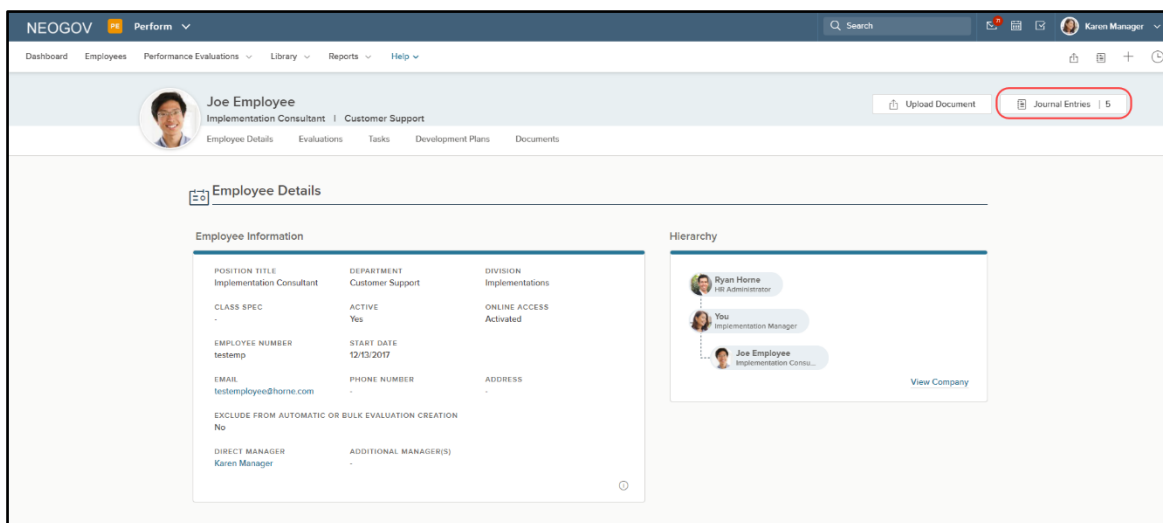


Figure 30: Talent Profile > Journal Entries

A flyout appears with all Journal Entries you created for that employee previously.

Adding Journal Entries via Recurring Journal Entry Tasks

Recurring Journal Entry Tasks can be configured within Evaluations to allow users to easily create Journal Entries on a recurring basis. The Recurring Journal Entry Tasks send email notifications to the task assignee, including reminder and overdue notifications.

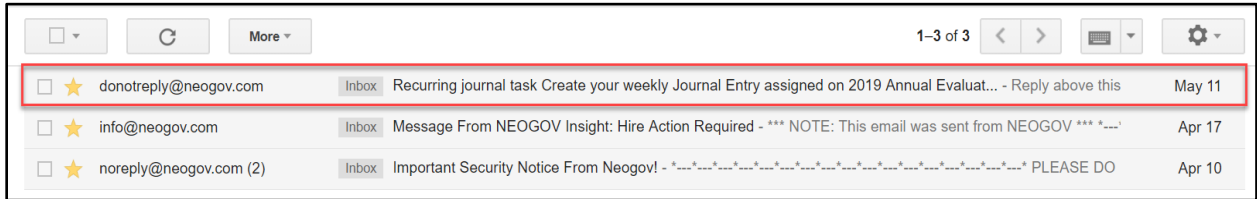


Figure 31: Recurring Journal Entry Task Email Notification

The task assignee can simply reply to those email notifications to create a Journal Entry for the employee being evaluated.

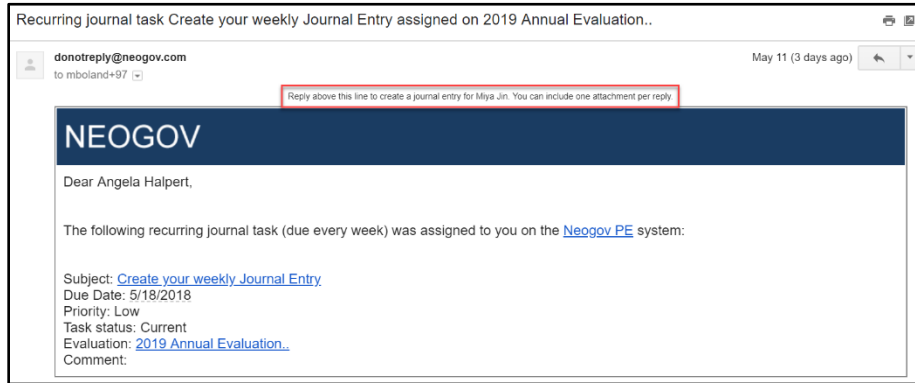


Figure 32: Recurring Journal Entry Task > Email Notification

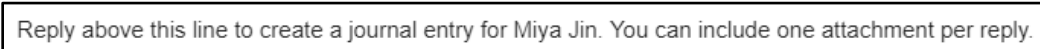


Figure 33: Recurring Journal Entry Task > Informational Tag Line

The task assignee needs to reply above the informational tag line which reads, "Reply above this line to create a Journal Entry for the employee. You can include one attachment per reply." The attachment is included as part of the Journal Entry once created.

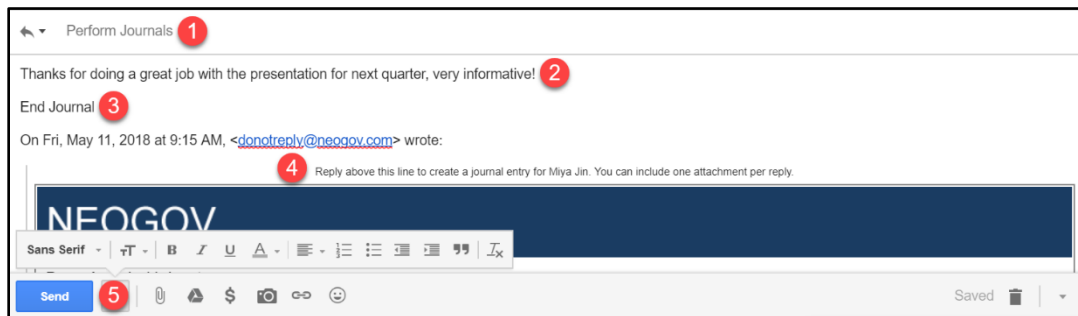


Figure 34: Replying to a Recurring Journal Entry Task Email Notification

Upon selecting reply:

1. The Perform Journal Entry email address (journals@neogov.net) is automatically included
2. Be sure to include your response which is created as a Journal Entry after sending
3. Be sure to include "End Journal" to denote the end of the Journal Entry
4. The informational tag line is below the response, as required
5. Select Send once ready

Creating a Journal Entry this way completes an instance of the Recurring Journal Entry Task and the task due date updates accordingly based on the frequency set by HR, as seen below.

The screenshot shows a 'My Tasks' dashboard with a summary bar at the top and a table of tasks below. The summary bar includes: Total (18), Rating (8), Approve And Sign (2), Sign (2), Approve (1), Other (5), and Overdue (7). The table has columns for Task, For Employee, Related To, and Due Date. The task 'Create your weekly Journal Entry' is assigned to Miya Jin and has a due date of 05/25/2018, which is highlighted with a red box.

Task	For Employee	Related To	Due Date
★ Final Rating	Jeremy Cueto	Development plan for Jeremy ...	11/09/2017
📅 Check-ins	Miya Jin	PE Plan of Improvement for Mi...	03/28/2018
📅 Check in	Ray Jones	2017 Evaluation	05/18/2018
📅 Create your weekly Journal Entry	Miya Jin	2019 Annual Evaluation..	05/25/2018
★ Rating For Alexis Newman's Alexis Annual 2018 Evaluation	Warren Moon	Alexis Annual 2018 Evaluation	10/27/2018

Figure 35: Recurring Journal Entry Task Due Date Updated

NOTE: If the Recurring Journal Entry Task is no longer current or not current at the time the task assignee responds to the email, a Journal Entry is not created, and they receive a bounce back email letting them know.

Creating and Activating Evaluations

If enabled by HR, Managers have the ability to create an evaluation.

Navigating to the Evaluation Section

From the **Employee List**, search for the specific employee and select their name. You are then taken to their **Talent Profile**. To create an evaluation, navigate to their **Evaluation** section.

Under the Evaluations section, select **+ Add Evaluation**.

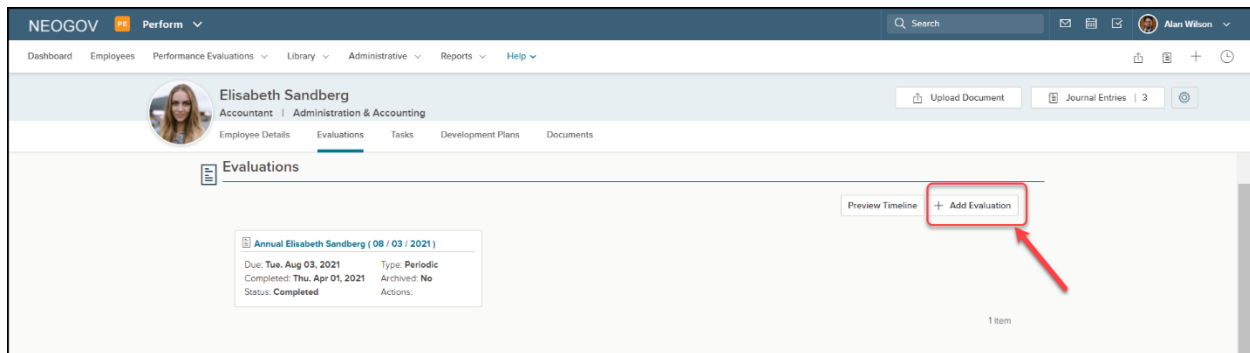


Figure 36: Add Evaluation

The **Evaluation Creator** page appears.

Figure 37: Evaluation Creator

1. Create a **Name** for the evaluation
2. Select if you would like to use the **Next Scheduled** evaluation, or create a **Custom** evaluation
 - a. If you choose **Next Scheduled**, the next scheduled evaluation automatically defaults
 - b. Per the above example, if you choose **Custom**, you can choose which evaluation to create for the employee as well as a specific *Due Date* and *Evaluation Program*
 - c. If you choose **Custom** a warning message will appear informing you that future goals will not link with previous goals if a custom evaluation is created
3. Select if this evaluation is a **Periodic** or **Probation** type evaluation
4. If custom evaluation was selected, enter in the **Due Date**
5. If custom evaluation was selected, select which **Program** to create the evaluation from
6. To see a preview of the evaluation select **Generate Preview**
 - a. The preview displays the Content and Process sections

Once all options have been configured, scroll to the bottom and select **Create**. Once created, you are re- directed to the Evaluation Detail Page.



For *Future Goals* to populate correctly on future evaluations the Next Scheduled option must be used

Depending on the configuration settings set by HR, the evaluation may remain in a *Draft* status, or may automatically update to *Before Ratings* status. If in draft, click **Start** to begin the evaluation rating process.

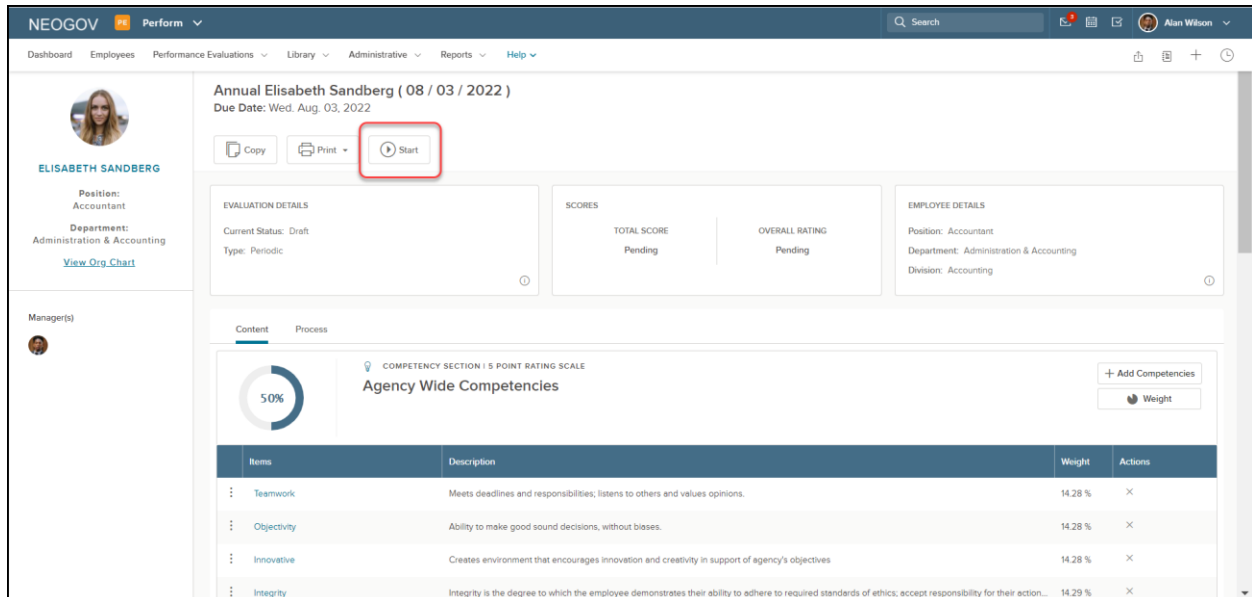


Figure 38: Starting an Evaluation

An **Activation Evaluation confirmation** pop-up message appears. Select **Continue** to start the evaluation rating process.

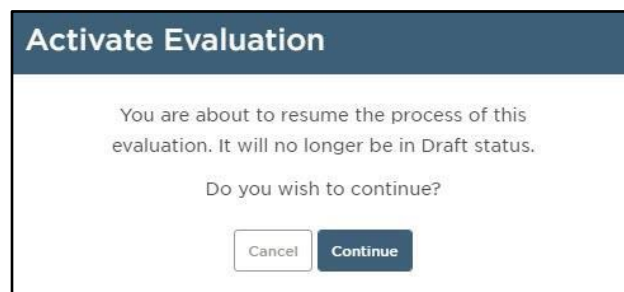


Figure 39: Confirmation Message

The evaluation is now activated and the first step in the process is now current.

Completing Tasks

As a Manager, you have tasks to complete for both yourself and your direct reports. This section covers how to complete various types of tasks.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see any current or overdue tasks that require your action.

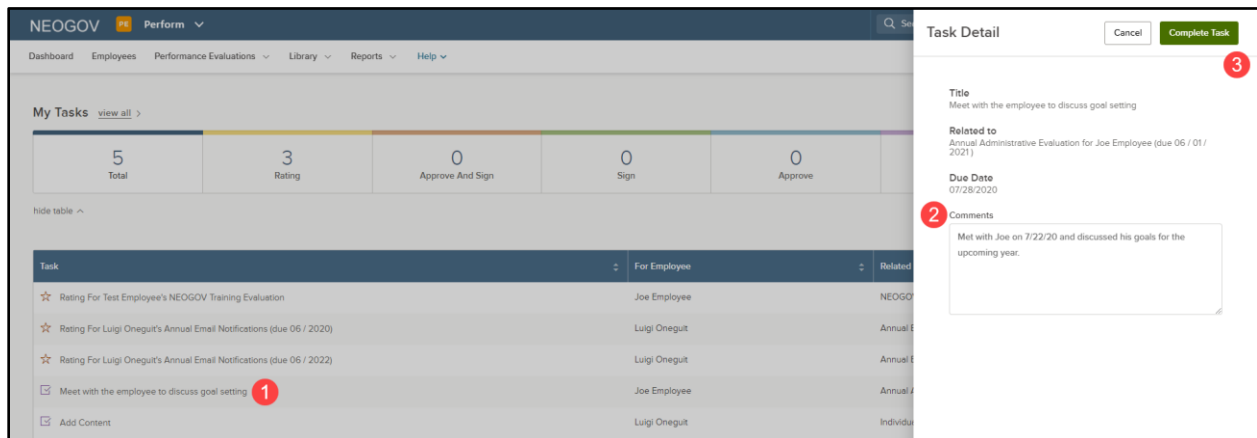


Figure 40: My Tasks > Completing a Task

1. Click into the corresponding **Task Name** from the list
 - a. In this example, Karen Manager must complete a manual task. She must meet with her direct report to discuss goal setting
2. A flyout appears with the task details
 - a. Enter any **comments** as necessary
3. When you have completed the task, select **Complete Task**
 - a. You receive a green banner once the step has been completed

The next task that has become current for the manager is a **Recurring Check-In** task.

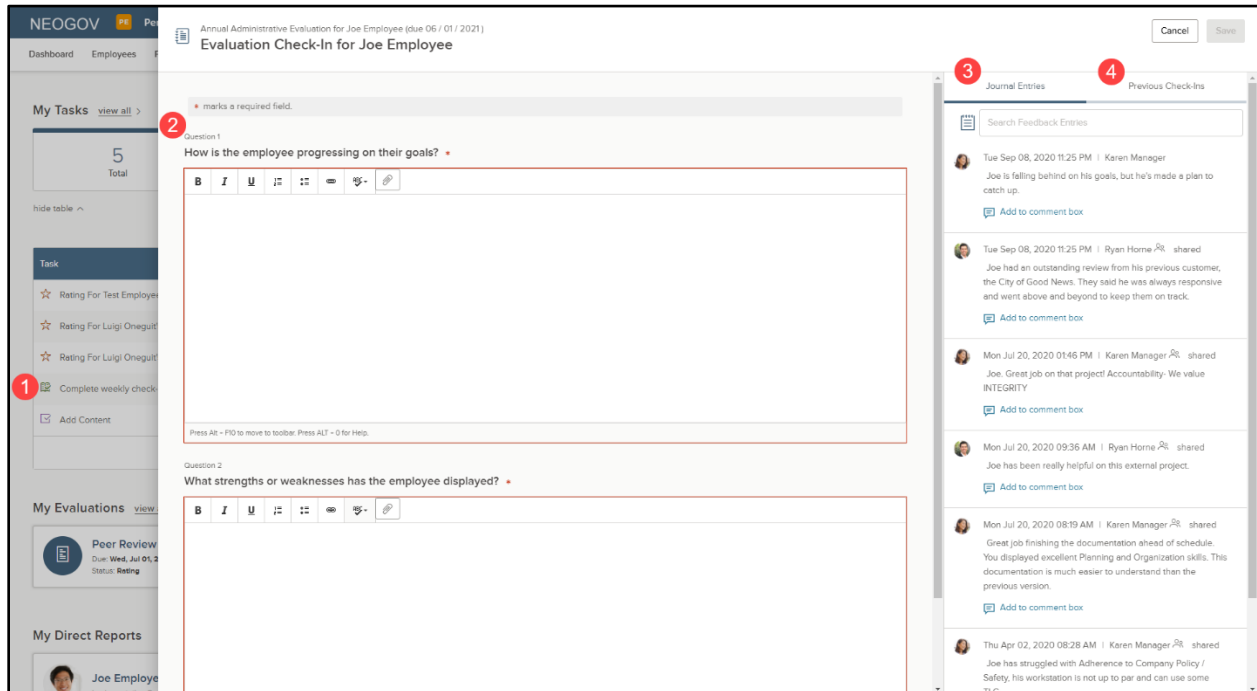


Figure 41: Recurring Check-In Task

1. Select the **Task Title**
2. A flyout appears with the **Check-In** questions
 - a. Required questions are highlighted in red and denoted by a red asterisk
3. **Journal Entries:** Any Journal Entries you have created for the related employee, or any Journal Entries shared with you about the employee, appear in the **Journal Entries** list
 - a. You can use the **Add to comment box** button to add any Journal Entry to a check-in question

4. **Previous Check-Ins:** If you have already completed the recurring check-in task at least once, you are able to see your previous entries in the Previous Check-Ins tab of the flyout
- This allows you to easily determine what progress has been made by reviewing your previous entries for the same check-in items. The previous check-ins show the date and time it was logged, as well as the check-in items and your responses to them
 - If the Direct Manager changes during the evaluation period. The New Manager will have access to see all Check-Ins completed by the Previous Manager.

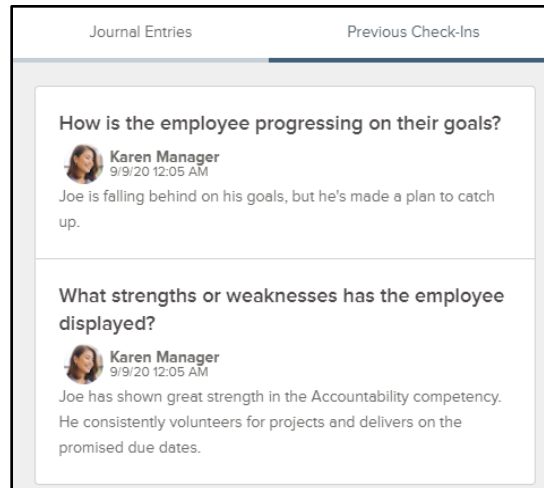


Figure 42: Previous Check-Ins Tab

NOTE: Attachments can be added while completing check-in tasks via the rich text editor. Responses to check-in questions show up in the Feedback Entries section of the rating form and any check-in attachments can be downloaded from there.

Once you have completed all required and optional questions, select **Save**. Because this is a recurring task, it stays on your dashboard. Once the next due date for the recurring task approaches, depending on HR configuration, you receive a reminder notice to complete the next Check-In form. Once rating has begun, the recurring task disappears.

The completed task filters out of your dashboard task list. To view the completed task, select the **view all** button as mentioned in

My Tasks.

Additional tasks, such as adding goals, rating, and approving & signing evaluations are covered in detail in the following sections of this guide.

Adding Content (Optional)

Some agencies grant their managers the flexibility to define the content of the evaluation for their direct reports. If this is the case, you can add goals, competencies, and or narratives to the evaluation. In addition, Managers can assign goals in bulk to their direct reports should a group of employees have the same goals.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner, or **Dashboard** in the navigation bar. Under **Other**, you can see the task to **Add Content** (task title will vary).

The screenshot displays the 'My Tasks' section of the NEOGOV Perform interface. At the top, there is a navigation bar with the NEOGOV logo, a search bar, and user information for Belen Zuniga. Below the navigation bar, there are several menu items: Dashboard, Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. The main content area is titled 'My Tasks' and includes a 'view all' link. A summary bar shows the following task counts: Total (6), Rating (2), Approve And Sign (1), Sign (1), Approve (1), Other (1), and Overdue (1). The 'Other' category is highlighted with a red box. Below the summary bar, there is a table of tasks with columns for Task, For Employee, Related To, and Due Date. The task 'Manager Add Goals to the Current Evaluation Period' is highlighted with a red box. The table also shows other tasks such as 'Sign Annual Evaluation (due 08 / 31 / 2021) for Belen Zuniga', 'Approve and Sign Annual Josh O'Neill (07 / 28 / 2021) for Josh O'Neill', 'Rating For Jennifer Smith's Annual Jennifer Smith (09 / 02 / 2021)', 'Rating For Jessica Ortega's Annual Jessica Ortega (09 / 13 / 2021)', and 'Approve Annual Alan Wilson (09 / 13 / 2021) for Alan Wilson'. A 'FEEDBACK & HELP' button is visible on the right side of the table.

Task	For Employee	Related To	Due Date
Sign Annual Evaluation (due 08 / 31 / 2021) for Belen Zuniga	Belen Zuniga	Annual Evaluation (due 08 / 31 / 2021)	03/27/2021
Manager Add Goals to the Current Evaluation Period	Isaac Tran	Annual Isaac Tran (09 / 13 / 2021)	04/14/2021
Approve and Sign Annual Josh O'Neill (07 / 28 / 2021) for Josh O'Neill	Josh O'Neill	Annual Josh O'Neill (07 / 28 / 2021)	07/18/2021
Rating For Jennifer Smith's Annual Jennifer Smith (09 / 02 / 2021)	Jennifer Smith	Annual Jennifer Smith (09 / 02 / 2021)	08/18/2021
Rating For Jessica Ortega's Annual Jessica Ortega (09 / 13 / 2021)	Jessica Ortega	Annual Jessica Ortega (09 / 13 / 2021)	08/29/2021
Approve Annual Alan Wilson (09 / 13 / 2021) for Alan Wilson	Alan Wilson	Annual Alan Wilson (09 / 13 / 2021)	09/03/2021

Figure 43: My Tasks – Add Content

Select the Task's name, and you are re-directed to your Direct Report's Evaluation Add / Edit Content page. Depending on the settings of the Add / Edit Content Task, you may be required to add goals, competencies, narratives, or any combination of each.

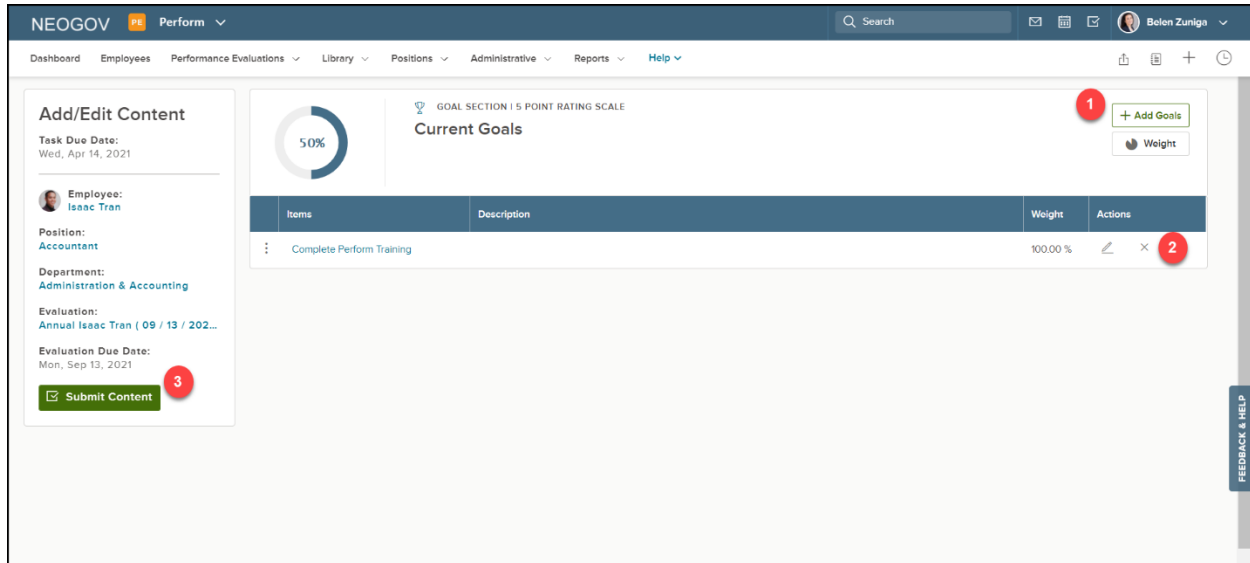


Figure 44: Adding Content

1. **Select the Add Items** button to add content (competencies, goals, or narratives) to your evaluation or select the **Weight** button to edit each item weight (if applicable).
 - a. You can add goals:
 - i. **From Goal Library:** Select an existing goal from the Goal List
 - ii. **From Position:** Auto-populate goals from Positions
 - iii. **From Class Specification:** Auto-populate from Class Specs
 - iv. **From Development Plan:** Auto-populate from an existing, current Development Plan
 - v. **From Last Scheduled Evaluation:** Auto-populate goals entered in a Future Goals section on the last scheduled evaluation completed
 - vi. **New Goal:** Create a brand-new goal
 - b. You can add competencies:
 - i. **From Competency Library:** Select an existing goal from the Competency List
 - ii. **From Position:** Auto-populate competencies from Positions
 - iii. **From Class Specification:** Auto-populate from Class Specs
 - iv. **From Development Plan:** Auto-populate from an existing, current Development Plan
 - v. **New Goal:** Create a brand-new competency
 - c. You can add narratives:
 - i. **From Narrative Library:** Select an existing narrative from the Narrative List
 - ii. **New Narrative:** Create a brand-new narrative
2. If there are existing items on the evaluation, per HR configuration, you can **edit** the goal(s), competency(s), or narrative(s). Items added from Libraries cannot be edited, but can be removed from the section.
 - a. Select the pencil icon for a flyout of the item detail page
 - b. Once you have made all edits, select save
3. Once you have added all content items and/or updated existing items, select **Submit Content**

If you choose to add a **New Goal**, a flyout appears to enter the Goal Details:

Figure 45: Adding a New Goal

1. Enter the **Goal Name** (required)
2. Select a **Due Date** (optional)
3. Select a **Category** (selection required; categories are preconfigured by your HR Team)
4. Enter in a **Description** (optional but encouraged to add details about the item)
5. Once completed, select **Save and Add Another** to create another goal, **Save** to finish adding goals or **Cancel** the action.

You may be able to edit the **Item Weights**. To do so, select the Weight button. An Items Weights flyout appears.

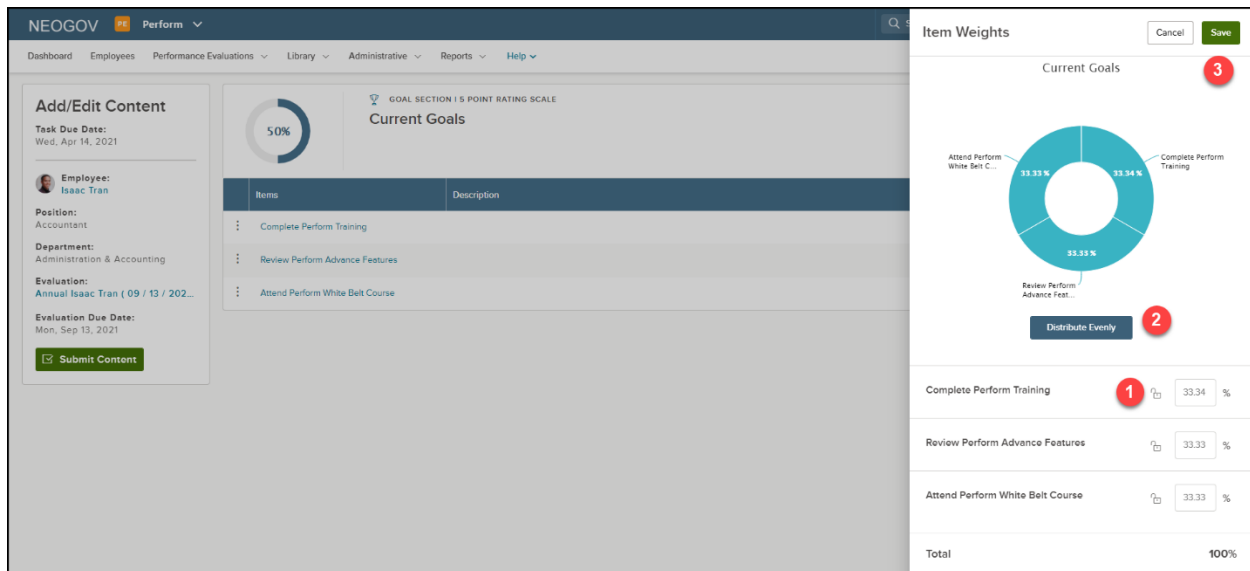


Figure 46: Item Weights

1. Then type in the desired percentage
 - a. Ensure the item is **unlocked** to edit the item weight
 - b. Ensure each item weight calculates to 100%
2. To have all items evenly weighted, select **Distribute Evenly**
 - a. Ensure all items are unlocked so the system distributes the weight percentage evenly
3. Once all updates have been made, select **Save**

If you choose to add a **New Competency**, a fly out appears to enter the Competency Details.

Add Competency 4 Cancel Save and Add Another Save

* Fields are required.

Title * 1
Teamwork

Description 2

Category * 3
Core Values

Figure 47: Adding a New Competency

1. Enter the **Competency Name**
2. Enter a **Description** (optional but encouraged to add details about the competency)
3. Select a **Category** (selection required; categories are preconfigured by your HR Team)
4. Once completed, select **Save and Add Another** to create another competency, **Save** to finish adding competencies or **Cancel** the action

If you choose to add a New Narrative, a fly out appears to enter the Narrative Details

Figure 48: Adding a New Narrative

1. Enter the **Narrative Name**
2. Enter a **Description** (optional but encouraged to add details about the narrative)
3. Once completed, select **Save and Add Another** to add another narrative, **Save** to finish adding narratives or **Cancel** the action

Once all content items have been added, click on the **Submit Content** button. A message appears asking if you are finished adding content to the evaluation. If finished click on **Yes, I'm Finished** or **No, Let's Go back** to add additional items.

Figure 49: Submit Content



Once you submit, you will not be able to go back and make changes without help from HR. Make sure you are definitely finished before submitting.

Once completed, a green success banner appears at the top of the screen.

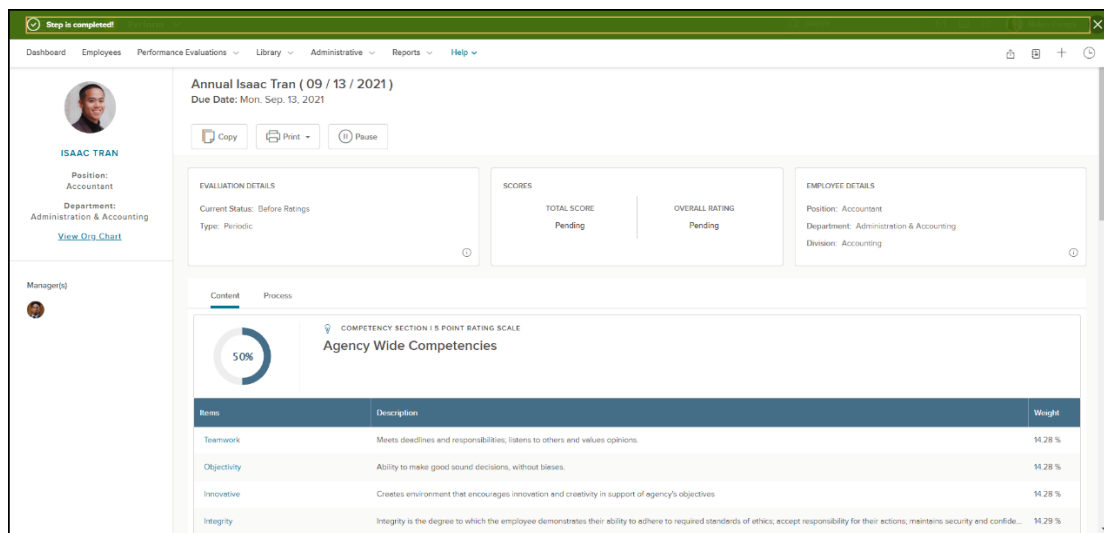


Figure 50: Green Success Banner

Navigating to the Performance Evaluation List – Adding Goals in Bulk

Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEGOV** in the top left corner. On the dashboard menu, select the drop-down menu, **Performance Evaluations**, and select **Performance Evaluation List**.

NEOGOVS Perform

Dashboard Employees Performance Evaluations Library Administrative Reports Help

My Tasks [view all >](#)

2 Total	0 Rating	0 Approve And Sign	0 Sign	0 Approve	2 Other	0 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
<input type="checkbox"/> Manager Add Goals to the Current Evaluation Period	Isaac Tran	Annual Isaac Tran (09 / 13 / 2022)	04/19/2021
<input type="checkbox"/> Manager Add Goals to the Current Evaluation Period	Elisabeth Sandberg	Annual Elisabeth Sandberg (08 / 03 / 2022)	04/19/2021

Showing 1 - 2 of 2 items

My Evaluations [view all >](#)

Annual Alan Wilson (09 / 13 / 2021)

Due: Mon, Sep 13, 2021 Completed: -

Status: Approval Type: Periodic

My Direct Reports

Elisabeth Sandberg 0 Overdue

Isaac Tran 1 Overdue

Figure 51: Performance Evaluations List

The Performance Evaluations List is a comprehensive list of your evaluations and your direct report's evaluations. From the list, you can bulk assign goals to different evaluations.

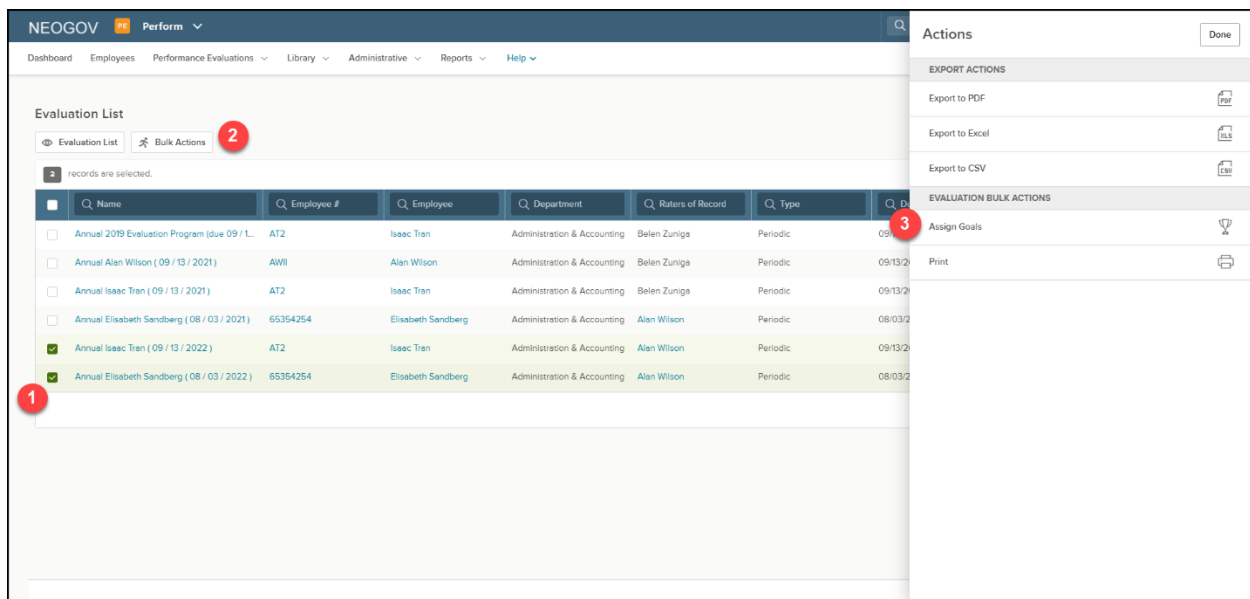


Figure 52: Bulk Actions

1. **Check the box** next to the name of the evaluation you would like to assign goals to
2. Select **Bulk Actions** once all appropriate evaluations have been selected
3. Select **Assign Goals** from the bulk actions flyout

Once complete, you are re-directed to Step 2 of 3: Goal Assignment.

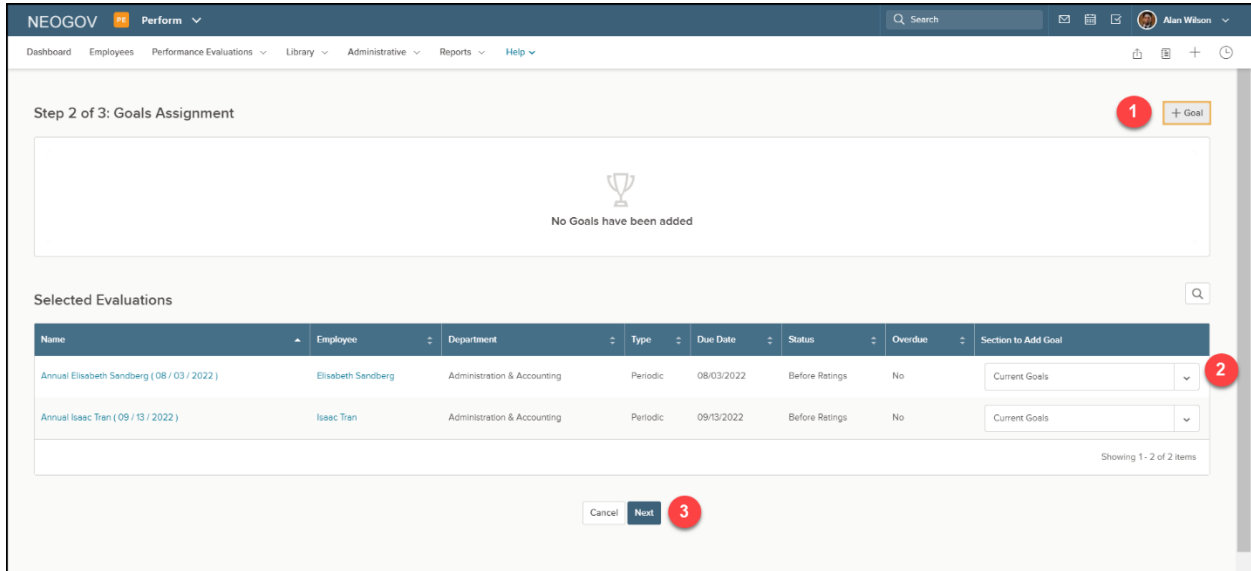


Figure 53: Bulk Assign Goals

1. Select **+ Goal** to add a new goal
2. Use the **Section to Add Goal** dropdown menu to choose where to add these goals
3. Once all goals have been added and the correct section selected, click **Next**



Only Evaluations that are in *Not Started*, *Draft*, or *Rating* are included in this process

Once all Goals are added you are re-directed to Step 2 of 3: Confirmation Page.

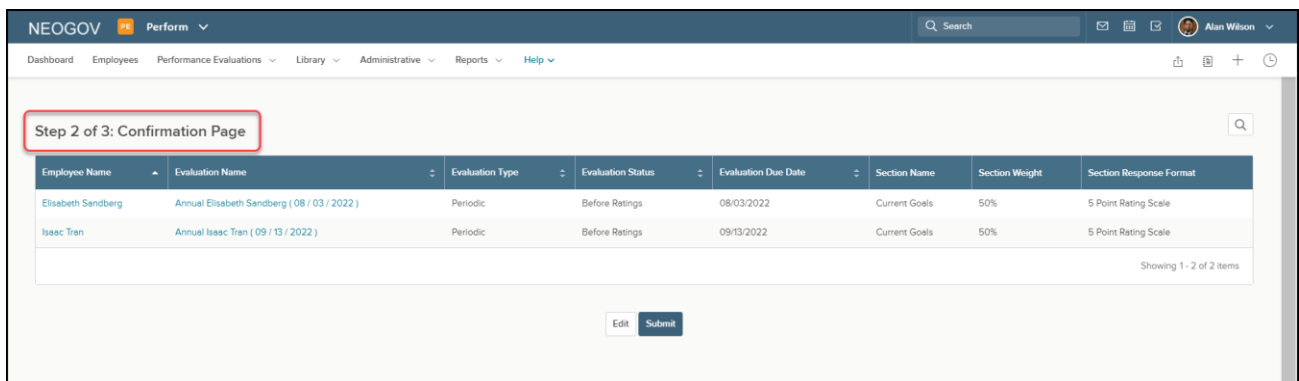


Figure 54: Confirmation Page

Review the information and select Submit to add the Goals to the selected Evaluations.

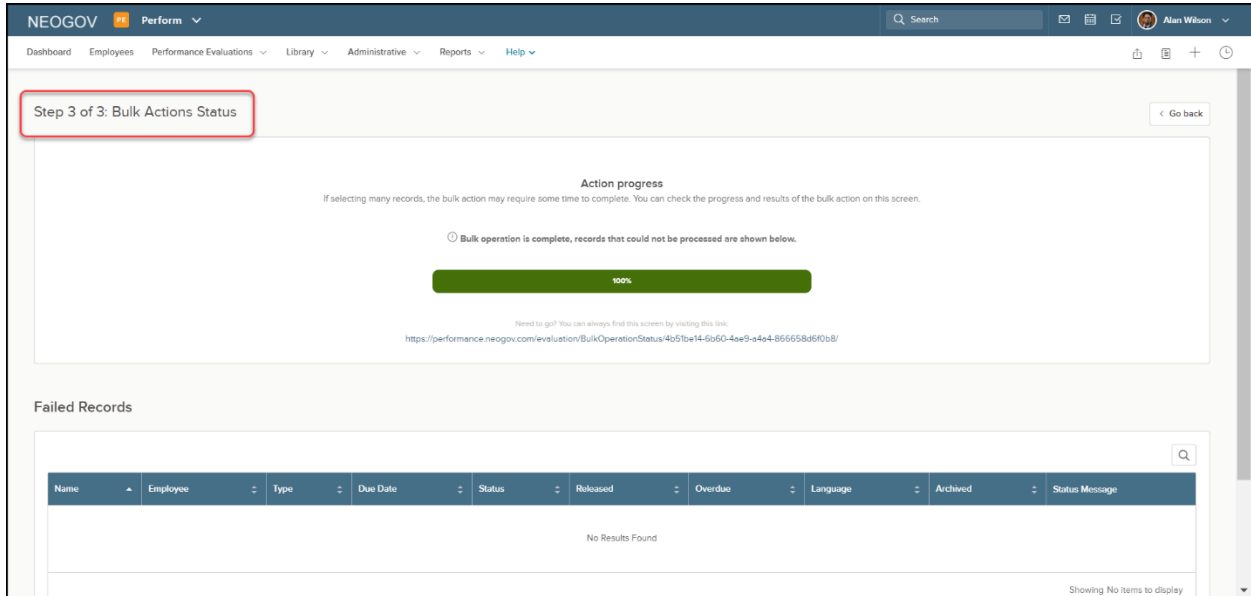


Figure 55: Bulk Action Status

When the action has processed, any failed records appear. All successful goals appear on the evaluation section denoted in step 2.

Rating Your Direct Report's Evaluation (Optional)

As a manager, you may be required to complete a rating for your direct reports. This section covers how to rate an evaluation and what tools are available to assist your rating process.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEGOV** in the top left corner. Here, you see a task to complete the **Rating**.

To complete a **Rating**, click the rating task name on the dashboard.

The screenshot shows the NEOGOV Perform dashboard. At the top, there's a navigation bar with 'NEGOV PE Perform' and a search bar. Below that, there are tabs for 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main section is titled 'My Tasks' and includes a summary bar with the following counts: Total (7), Rating (4), Approve And Sign (0), Sign (0), Approve (0), Other (3), and Overdue (2). Below the summary bar is a table of tasks:

Task	For Employee	Related To	Due Date
★ Rating For Libby Te's L. Te - Probation Review	Libby Te	L. Te - Probation Review	07/18/2017
☑ Check in with Ziggy	William Lee	N/A	11/14/2017
☑ Review, Add and/or Edit Goals	Jill Phung	Annual Evaluation Program	11/25/2017
☑ Review, Add and/or Edit Goals	Jill Phung	Annual Evaluation Program (due 08 / 2018)	11/25/2017
📝 Answer check-in question	Jason Phung	Annual Evaluation Program (due 07 / 2018)	12/04/2017
📝 Answer check-in question	Ziggy Alberts	Annual Evaluation Program (due 05 / 2019)	12/05/2017
★ Rating For Ziggy Alberts's Annual Evaluation Program (due 05 / 2019)	Ziggy Alberts	Annual Evaluation Program (due 05 / 2019)	04/27/2019

The task 'Rating For Ziggy Alberts's Annual Evaluation Program (due 05 / 2019)' is highlighted with a red box. The bottom right corner of the table shows '1 - 7 of 7 items' and a 'FEEDBACK & HELP' button.

Figure 56: Rating Task

NOTE: Shared Rating steps for Multiple Managers can only be accessed by 1 manager at a time. The following message appears if another Manager in your step is editing the Rating Form.

Rating Task is Locked

The task is currently locked by another rater. Please check back later if you wish to access this task.

Go to Evaluation Details

Figure 57: Rating Task Locked Confirmation Box

If no other manager is editing the rating form, then you are then re-directed to the Rating Form.

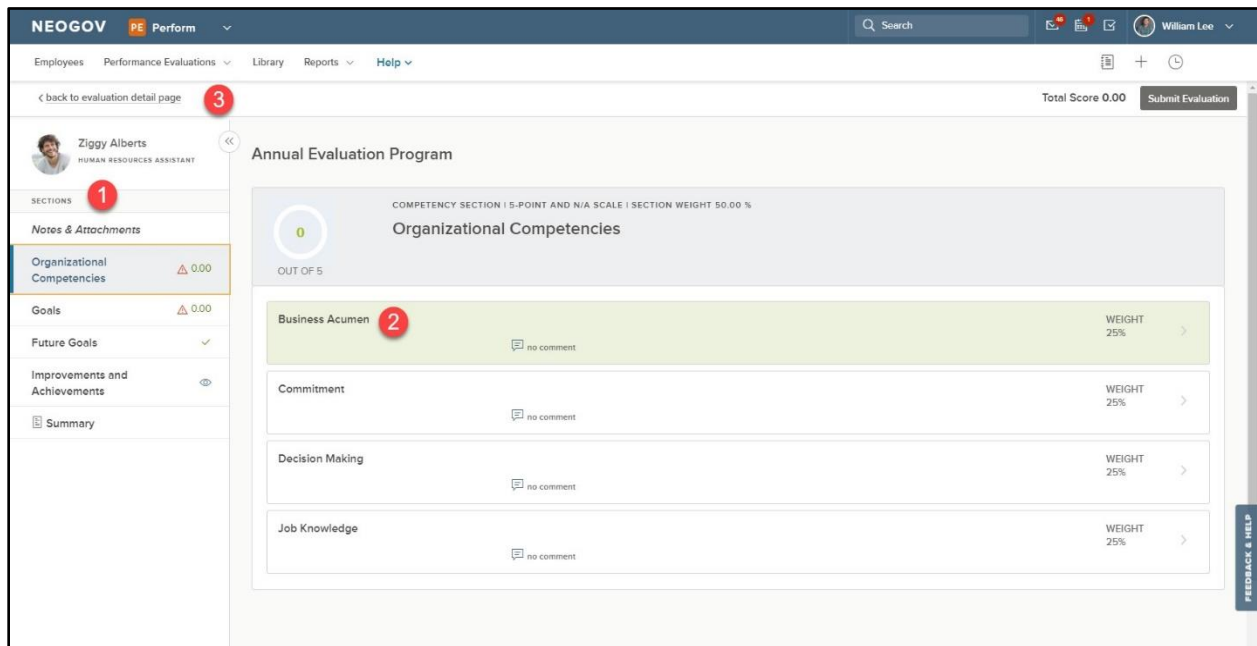


Figure 58: Rating Form

1. To **view and rate** different items, click the various sections
 - a. If **Notes & Attachments** are provided, select print to download the notes
 - b. To download the attachment, select the attachment name

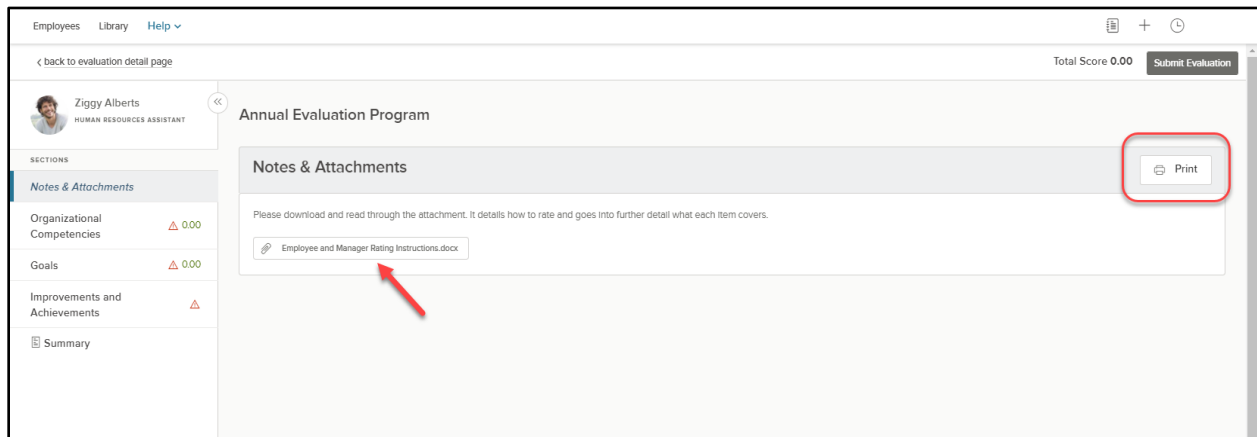


Figure 59: Notes and Attachments

2. To rate an item, click an item name, e.g. *Business Acumen*, within a section, and a flyout of the **Rating Card** appears (see below for further information)
3. To leave the rating card and return back to the evaluation detail page, select **back to evaluation detail page**

Use the Evaluation Symbols legend below to identify the different symbols in the evaluation sections:




	= Required section, action required
	= Read only
	= Section completed

Figure 60: Evaluation Symbols Legend

Upon selecting the item name, the rating card flyout appears.

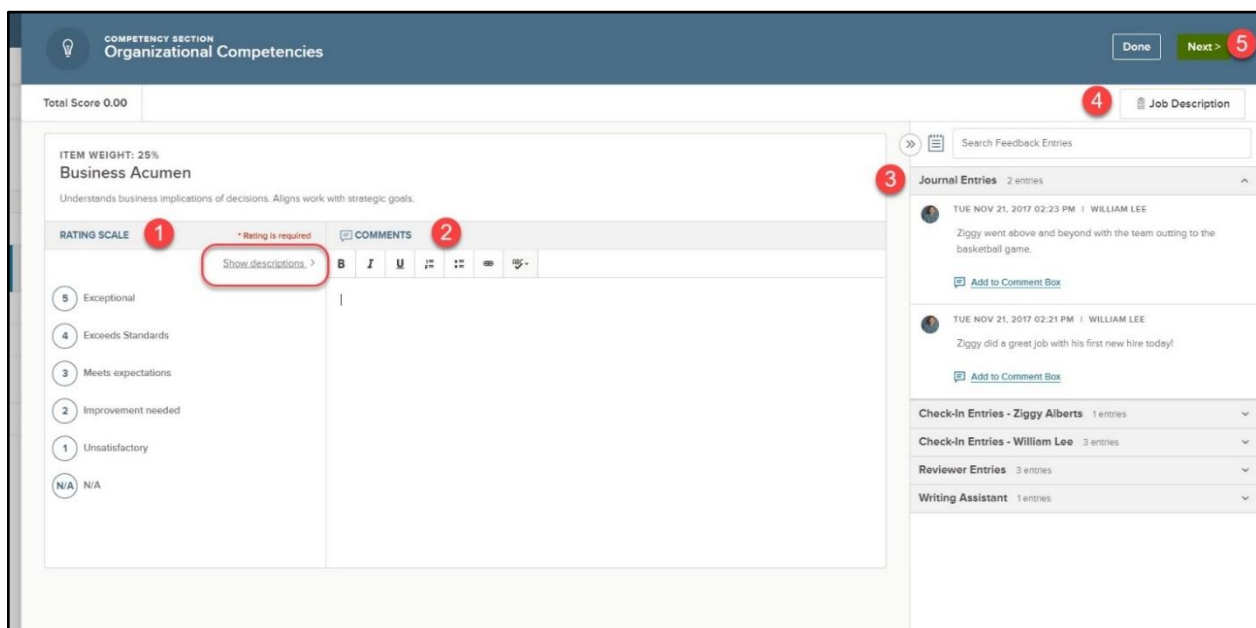


Figure 61: Rating Card

1. If provided by HR, you see a **Rating Scale**. To view a description of each rating scale value, select the **Show descriptions** button and a flyout appears with detailed information
2. Type any text into the **Comments** box, as needed. Edit text using the rich text editor provided
 - a. Per HR configuration, if a comment is required the box is highlighted in red
 - b. While rating, the system auto saves all progress made
 - c. If needed, you may exit out of the rating card and resume rating at a later time
3. The **Feedback Entries** appear on the right side of the rating card. If available, you see **Journal Entries, Check-In Entries, Reviewer Entries, and Writing Assistant**. You can copy the feedback entries directly into the comment box by selecting **Add to Comment Box**. To filter for any specific key words, use the *Search Feedback Entries* bar
 - a. Any **Journal Entries** created by you or shared by another employee appear here

- b. If **Writing Assistants** have been provided by HR, the writing assistant section also appears
- c. If any previous reviews have been made, they appear in the **Reviewer Entries** section
- d. If **Check-Ins** are a part of your process, then the check-in comments appear
4. Per HR configuration, you can see detailed information about your position by selecting **Job Description**
5. Click **Next** to move to the next step

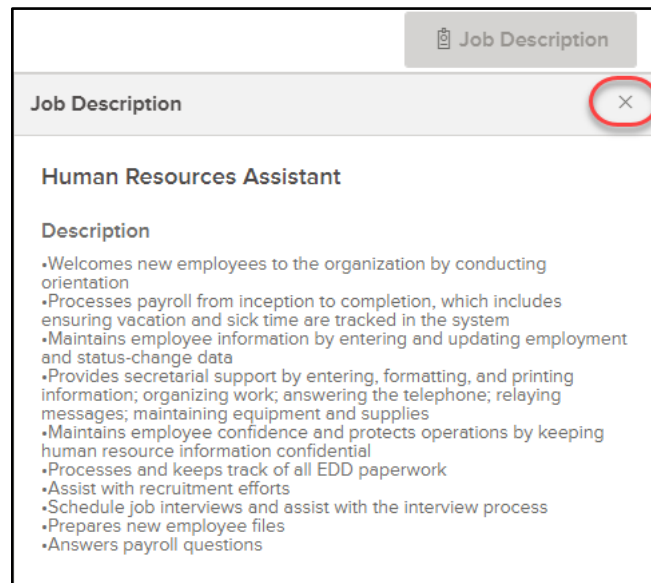


Figure 62: Job Description

To exit out of the Job Description, select the 'X' icon, which redirects you to the Feedback Entries view.



The Overall Rating is determined per your agency's evaluation process. You may be required to select an overall Rating for the evaluation, or the Overall Rating defaults automatically without any ability to change. In other cases, there is no Overall Rating scale and only comments can be entered

The Summary Page shows you a high level overview of all ratings, in a side-by-side comparison.

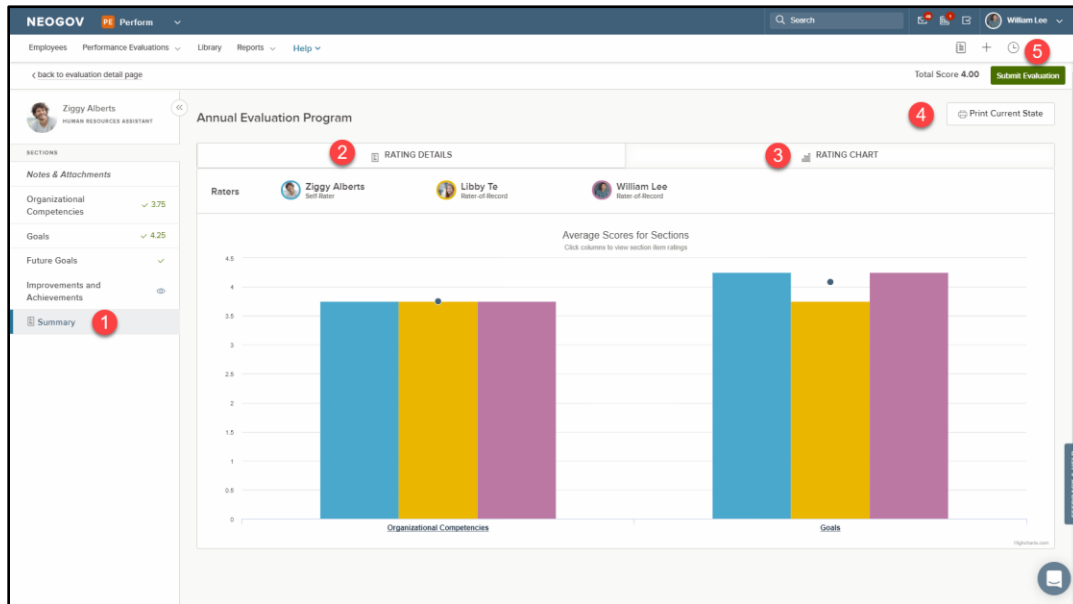


Figure 63: Evaluation Summary

1. Select the **Summary** section
2. Review the details of the evaluation including your ratings and comments in the **Rating Details** tab
3. To see a comparison of scores (if numeric scoring is used), view the **Rating Chart** tab
 - a. Select any portion of the graph to see the ratings broken down into each item rated
4. To print the current state of the evaluation, select **Print Current State**
5. Once you have reviewed the evaluation, select **Submit Evaluation**

Once all required rating and/or comments are complete, select the **Submit Evaluation** button in the top right corner.

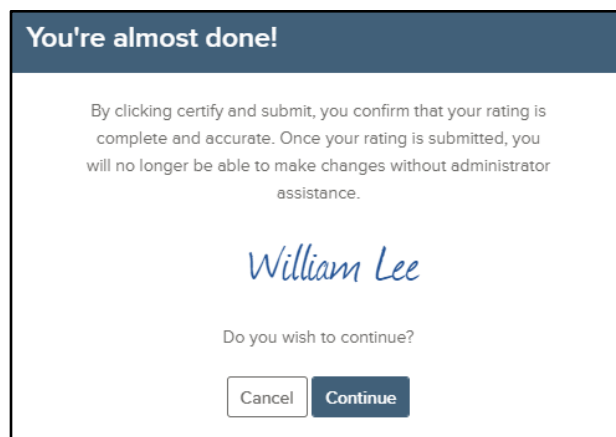


Figure 64: Evaluation Submitted Message

You receive a confirmation message. Once the evaluation is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click **Cancel**. Otherwise, select **Continue**.

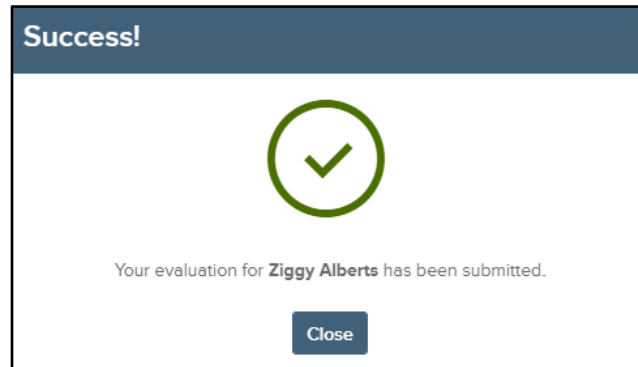


Figure 65: Evaluation Submitted Success Message

Once your evaluation has been successfully submitted, the next step in the process becomes current.



To complete a self-evaluation rating,
follow the steps in the same manner
outlined above

Approving and Signing an Evaluation (Optional)

After all Raters have completed their rating, you may need to **Approve and Sign** the evaluation before it is released to the employee. If you are required approve and/or sign, you will receive an email notification and the task will appear on your dashboard.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see the task to **Approve and Sign** the completed evaluation.

Click the **Approve and Sign** task from the task list on your Dashboard. If there are multiple tasks requiring your action, you can use the **Approve & Sign** filter to limit the tasks displayed on your Dashboard.

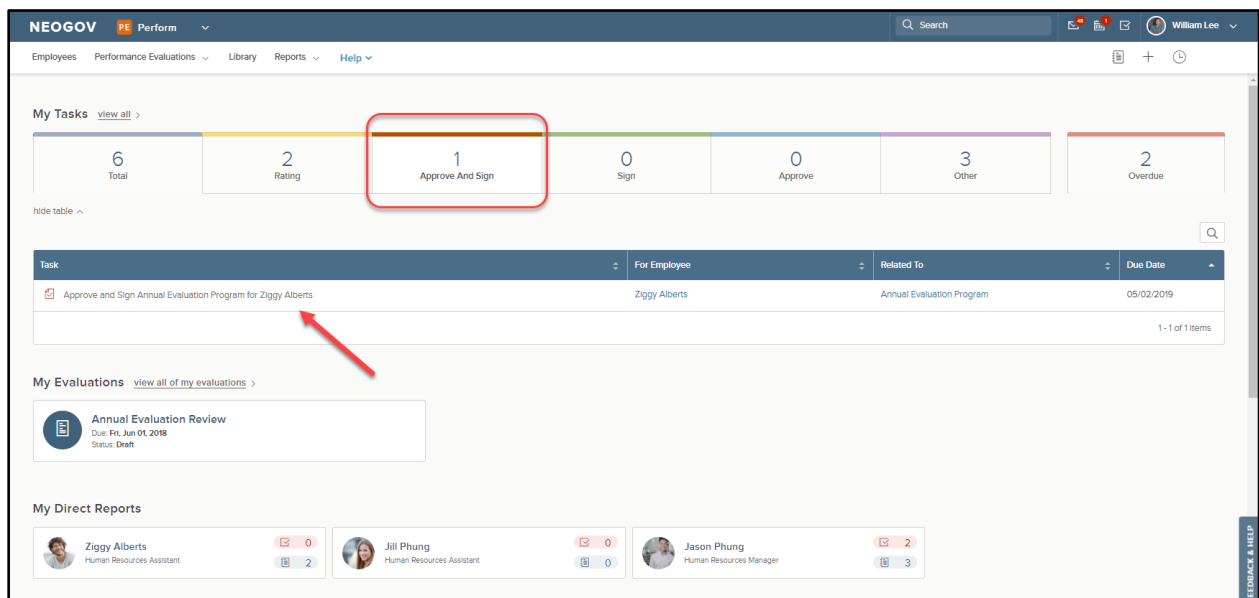


Figure 66: After Rating Signature Task

Upon selecting the approval task, the approval page displays.

The screenshot displays the NEOGOV 'Approval Form' for Maya Jin's 2020 annual evaluation. Key elements include:

- Header:** Employee name (Maya Jin), evaluation name, due date, and 'Approve & Sign' / 'Deny' buttons.
- Rating Summary (1):** Shows a score of 3.12 out of 5 (62.5%) and an overall rating of 'Meets Expectations / 3.00'. A table lists raters: Maya Jin (3.75/5, 75%, Exceeds Expectations) and Ryan Horne (3.12/5, 62.5%, Meets Expectations).
- Sections (2):** A sidebar for navigating through evaluation sections like Core Values, Employee Goals, and Overall Rating.
- Rating Details (3):** A detailed view of the 'Core Values' competency (3.24/5). It shows individual ratings: Maya Jin (4 - Exceeds Expectations) and Ryan Horne (3 - Meets Expectations).
- Buttons (4):** 'Approve & Sign' and 'Deny' buttons for finalizing the evaluation.

Figure 67: Approval Form > Approve and Sign Task

1. **Rating Summary:** Displays the overall score and all raters with their respective scores
2. Navigate through the various **Sections** by clicking on the name
 - a. Scroll through each section to review the ratings and any comments provided
3. Toggle between the **Rating Details** or the **Rating Chart**
 - a. The Rating Chart displays a bar graph of all raters
4. Once you have reviewed the evaluation, select **approve & sign**, or **deny**
 - a. If deny is chosen, based on HR configuration, you are required to select which rater to send the evaluation back to, and you must enter in a comment



To make changes to the evaluation you've submitted for your direct report, deny the evaluation to re-open the rating task. Once the evaluation is re-submitted, all approvals and signatures are re-triggered

Once you have reviewed the evaluation and select the **approve & sign** button, a flyout appears.

Figure 68: Approve and Sign

Enter in any comments, sign and submit. Once approved, a green success banner appears, and you are re- directed to the evaluation details page.

Items	Description	Score	Rating
Job / Technical Knowledge	Possesses and demonstrates a thorough understanding and working knowledge of all phases of the job, including the various techniqu...	0.43	Meets Expectations
Problem Solving and Decision Making	Demonstrates ability to make sound and proper decisions by: defining the issue, diagnosing the problem, analyzing the cause(s) and dr...	0.57	Exceeds Expectations
Planning and Organization	Scheduling work; coordinating with other units and within work unit; awareness of, and preparation for possible changes and problems...	0.57	Exceeds Expectations
Communication - Verbal and Written	Demonstrates clear effective communication (includes: listening, nonverbal communication and language) in individual and group settin...	0.29	Improvement Needed
Interpersonal Skills / Teamwork	Demonstrates ability to establish and maintain effective relationships both internally and externally. Willing to cooperate and be flexib...	0.43	Meets Expectations
Adherence to Company Policy / Safety	Properly interprets and applies company, department and job policies and guidelines. Maintains a clean safe work area and wears appro...	0.43	Meets Expectations
Self Management Skills	Displays confidence and remains in control when handling difficult or new situations. Demonstrates adaptability and flexibility when han...	0.43	Meets Expectations

Figure 69: Green Success Banner > Eval Details Page

The evaluation has been successfully approved and signed. An email is generated to the next approver in the process.

Printing an Evaluation

If you are the last approver/signature in the process, the evaluation status changes to **Completed** and you are directed to the Evaluation Print Preview.

Annual Administrative Evaluation for Joe Employee (due 06 / 01 / 2021)

Evaluation Status: **Completed**

Joe Employee Direct Manager: Karen Manager

Annual Administrative Evaluation for Joe Employee (due 06 / 01 / 2021)
Due Date: Tue, Jun 1, 2021

Visibility Settings 1

- General Information
- Raters
- Karen Manager
- Content
- Agency Wide Competencies
- Section II - Current Goals and Objective - Results
- Section III - Accomplishments and Contributions
- Section IV - Goals and Objectives (for new review period)
- Overall Rating
- Rating Scales
- Notes & Attachments
- Process

General Information

Position Implementation Consultant	Division Implementations	Evaluation Type Periodic
Department Customer Support	Class Spec	

Ratings Summary :

Total Score		Overall Rating	
3.14 out of 5 (62.85%)		Meets Expectations / 3.00	

Rater	Type	Total Score	Overall Rating	Weight
Karen Manager	Rater	3.14 out of 5 (62.85%)	Meets Expectations / 3.00	100 %

Content

Competency Section I Smithfield 5 Point Rating Scale Section Weight 100 %

Agency Wide Competencies

Review the employee's performance by checking the most appropriate box in each category based on the time on the job. Write specific example's supporting each rating.

2 Go To Evaluation Details 3 Print

Figure 70: Evaluation Print Preview

- 1. Visibility Settings:** Select which sections should be shown on the print preview
- 2. Go To Evaluation Details:** Click to navigate to the Evaluation Details Page
- 3. Print:** Click to generate a printable PDF in a pop up tab (ensure pop ups are not blocked in your browser settings)

Reports

Managers are able to run reports on employees within their managerial hierarchy. All reports can be exported and printed.

Navigating to Reports

On your dashboard menu, you see the **Reports** header. Hover over the menu and select **Reports**.

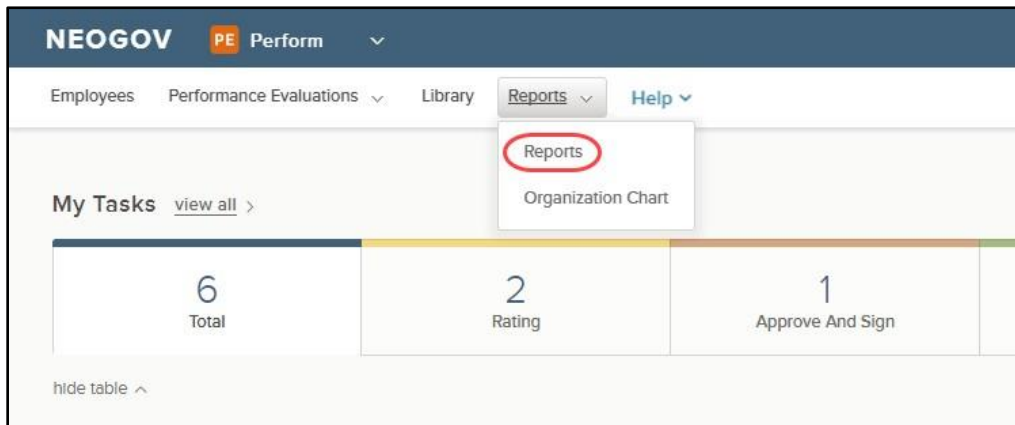


Figure 71: Reports Menu

You are now in the Reports Dashboard. A list of all pre-defined reports is displayed.

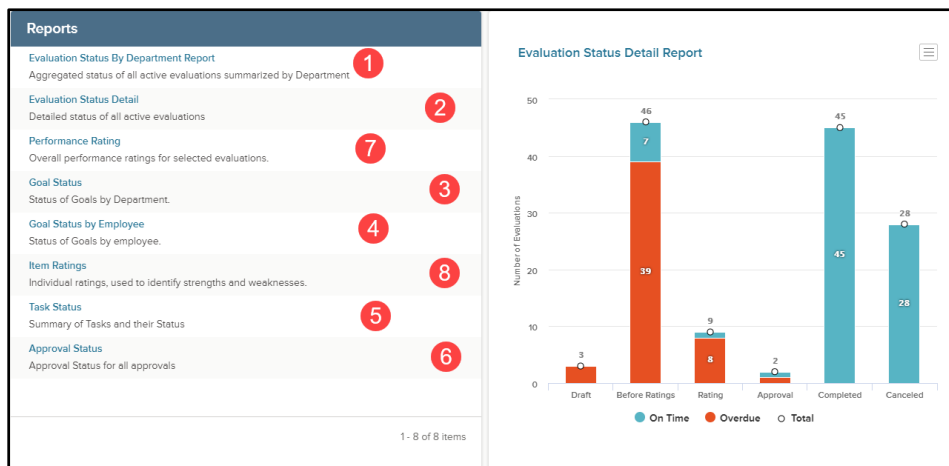


Figure 72: Reports Dashboard

Reports best utilized for tracking are:

1. **Evaluation Status by Department:** Aggregated status of all active evaluations summarized by Department
2. **Evaluation Status Detail:** Detailed status of all evaluations
3. **Goal Status:** Status of goals by Department
4. **Goal Status by Employee:** Status of goals by employee

- 5. **Task Status:** Summary of tasks and their status
 - a. Scores for completed rating tasks
 - b. Comments for manual tasks
 - c. Individual rater information
- 6. **Approval Status:** Status for all approval tasks

Reports best utilized for analysis are:

- 7. **Performance Rating:** Overall performance ratings for selected evaluations
- 8. **Item Ratings:** Individual ratings used to identify strengths and weaknesses

There are also quick, useful charts on the Reports Dashboard; the first showing the **Evaluation Status Detail Report:**

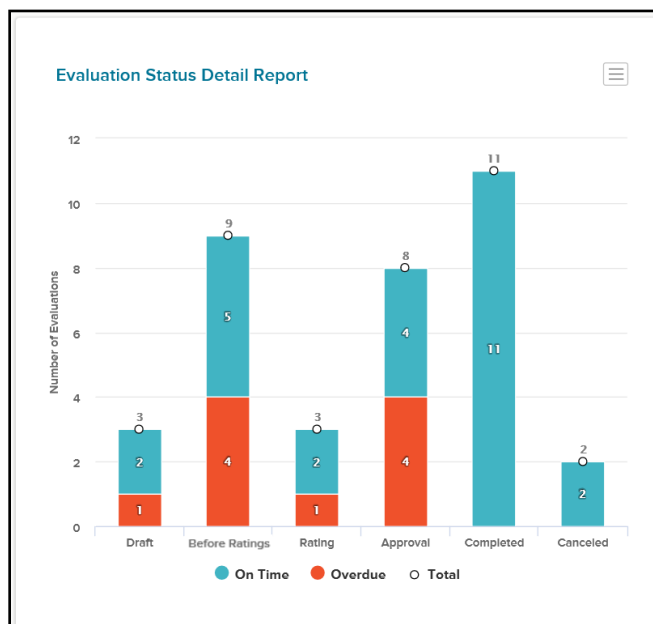


Figure 73: Reports Dashboard > Eval Status Detail Report

Below the Reports List and the Evaluation Status Detail chart, two additional charts are available: the **Performance Rating Report** and the **Approval Status by Department Report**.

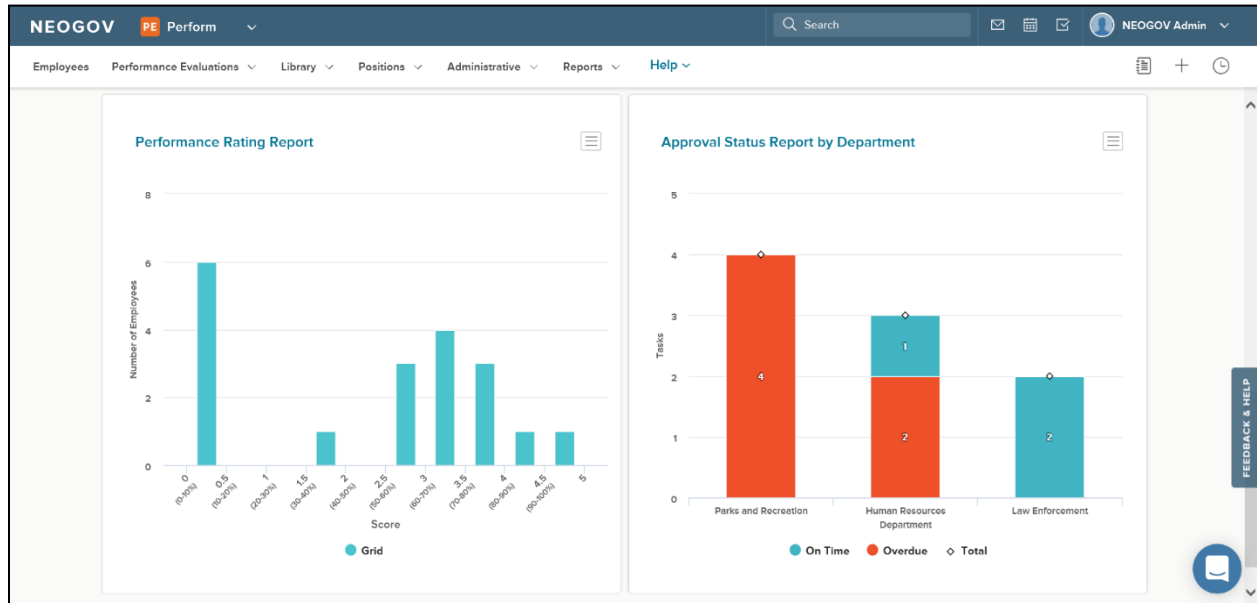


Figure 74: Reports Dashboard IV

Clicking the title of each chart brings you into the corresponding report. The charts can also be printed or downloaded as images by clicking the **three bars** icon in the top right of each chart.

The rest of this section is devoted to diving into the functionality of some of the more frequently used reports in the system.

Evaluation Status Detail Report

The **Evaluation Status Detail** report shows detailed statuses of all evaluations in your hierarchy. The interactive graph displays all evaluations by status including *Draft*, *Before Ratings*, *Rating*, *Approval*, *Completed*, and *Canceled* and shows how many evaluations in each status are on time and/or overdue. The blue portion of each bar represents evaluations that are on time, while the red represents those that are overdue.

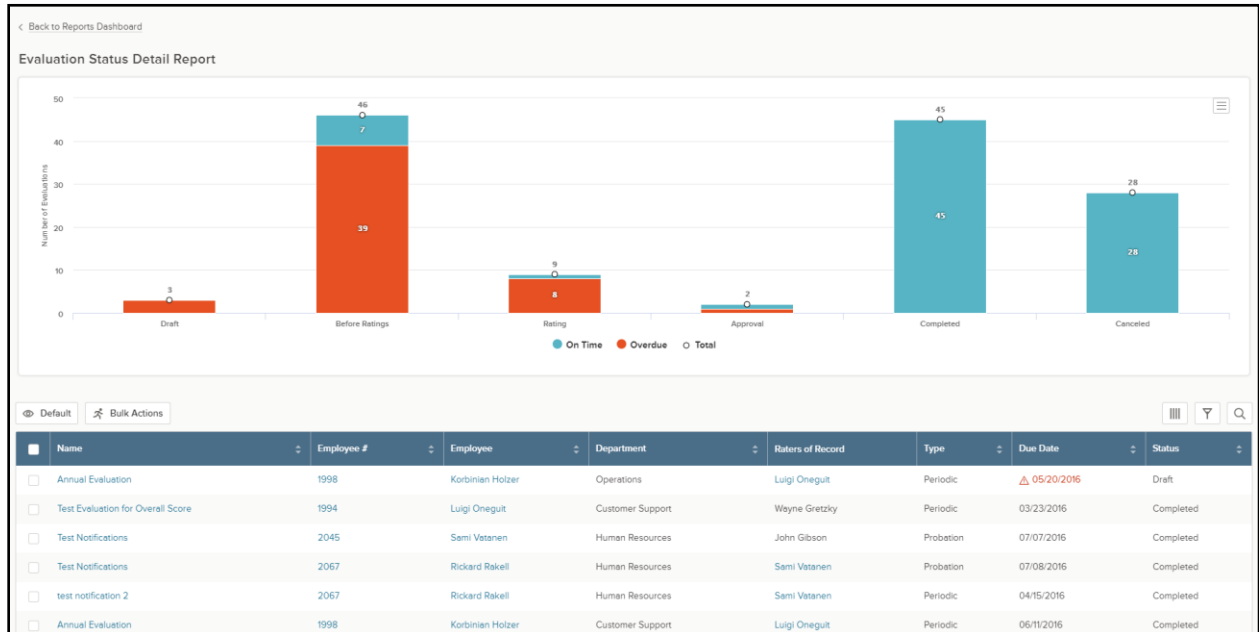


Figure 75: Evaluation Status Detail Report

To only view the overdue evaluations in rating status, click on the red portion of the rating status bar to update the grid. Clicking the bar again removes the filter.

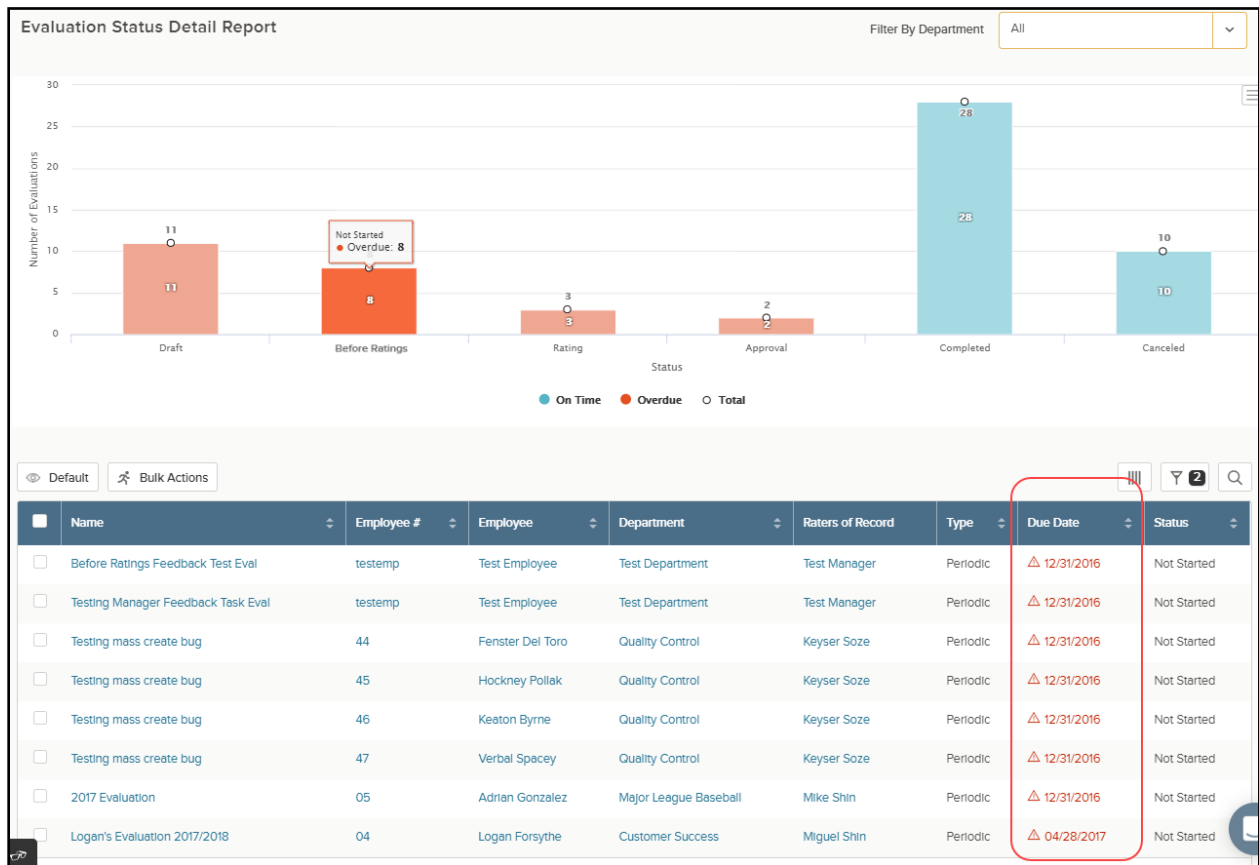


Figure 76: Before Ratings Evaluations That Are Overdue

To print or export the graph, click the button on the right of the graph and select the appropriate option.

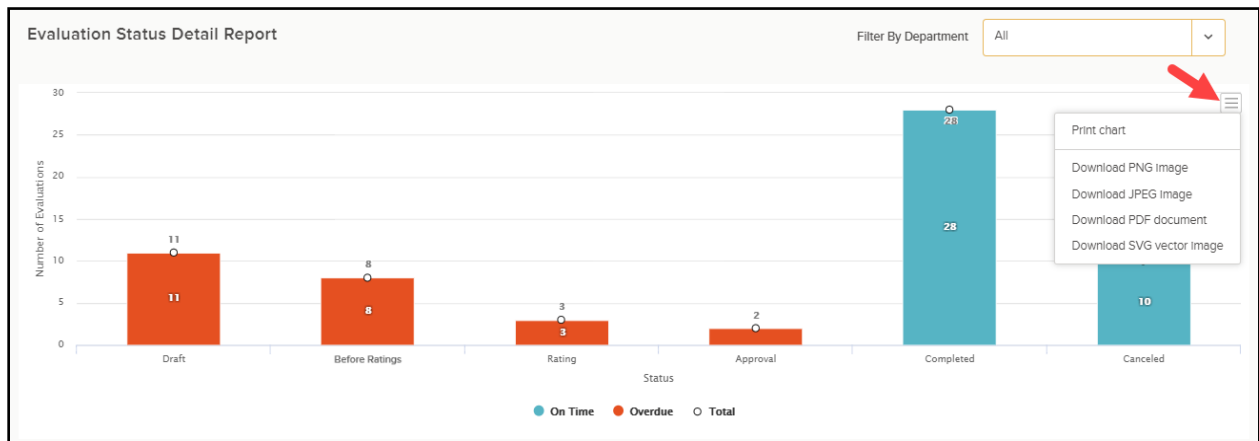
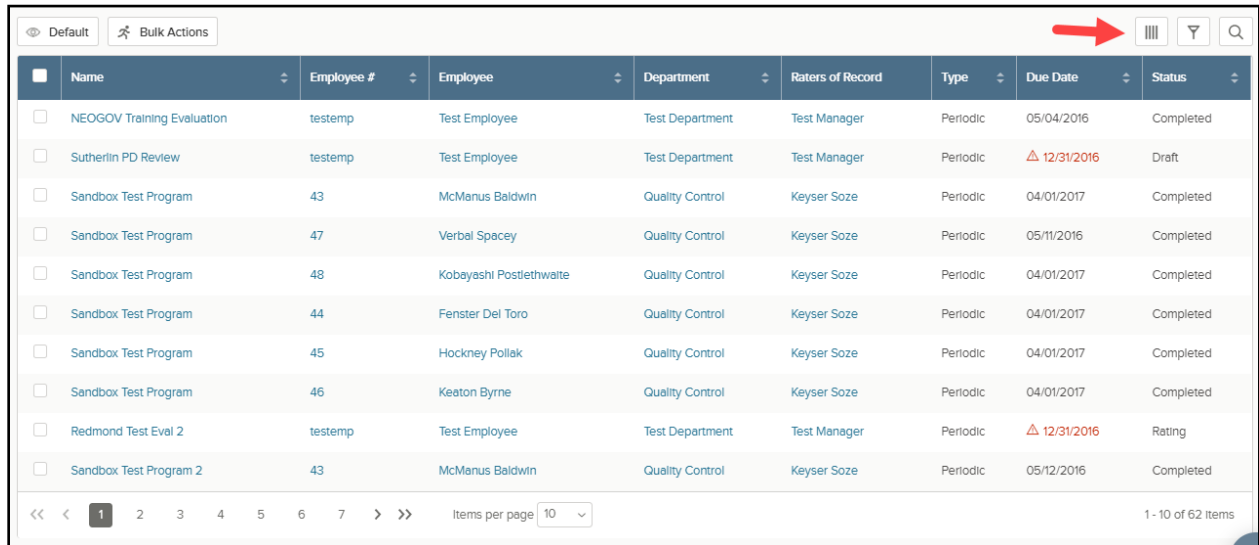


Figure 77: Export Graph

Columns can also be added or removed by clicking on the column button.



The screenshot shows a table with the following columns: Name, Employee #, Employee, Department, Raters of Record, Type, Due Date, and Status. A red arrow points to a column configuration button (represented by a vertical bar icon) in the top right corner of the table header area.

<input type="checkbox"/>	Name	Employee #	Employee	Department	Raters of Record	Type	Due Date	Status
<input type="checkbox"/>	NEOGOV Training Evaluation	testemp	Test Employee	Test Department	Test Manager	Periodic	05/04/2016	Completed
<input type="checkbox"/>	Sutherlin PD Review	testemp	Test Employee	Test Department	Test Manager	Periodic	▲ 12/31/2016	Draft
<input type="checkbox"/>	Sandbox Test Program	43	McManus Baldwin	Quality Control	Keyser Soze	Periodic	04/01/2017	Completed
<input type="checkbox"/>	Sandbox Test Program	47	Verbal Spacey	Quality Control	Keyser Soze	Periodic	05/11/2016	Completed
<input type="checkbox"/>	Sandbox Test Program	48	Kobayashi Postlethwaite	Quality Control	Keyser Soze	Periodic	04/01/2017	Completed
<input type="checkbox"/>	Sandbox Test Program	44	Fenster Del Toro	Quality Control	Keyser Soze	Periodic	04/01/2017	Completed
<input type="checkbox"/>	Sandbox Test Program	45	Hockney Pollak	Quality Control	Keyser Soze	Periodic	04/01/2017	Completed
<input type="checkbox"/>	Sandbox Test Program	46	Keaton Byrne	Quality Control	Keyser Soze	Periodic	04/01/2017	Completed
<input type="checkbox"/>	Redmond Test Eval 2	testemp	Test Employee	Test Department	Test Manager	Periodic	▲ 12/31/2016	Rating
<input type="checkbox"/>	Sandbox Test Program 2	43	McManus Baldwin	Quality Control	Keyser Soze	Periodic	05/12/2016	Completed

Navigation: << < 1 2 3 4 5 6 7 > >> Items per page: 10 1 - 10 of 62 items

Figure 78: Add Columns to Report

In the column options flyout, add or remove the desired items.

Columns Done

- Name
- Employee #
- Employee
- Department
- Raters of Record
- Type
- Due Date
- Status
- Bargaining Unit
- Current Step Assignee
- Current Step
- Position Title
- Position Code
- Class Spec Code
- Class Spec
- Division Code
- Division
- Department Code
- Archived
- Completion Date
- Active
- Overdue
- Raters #
- Direct Manager

Figure 79: Available Columns to Add

Once the report has been configured as desired, additional views can be saved via the custom views button for easy reference.

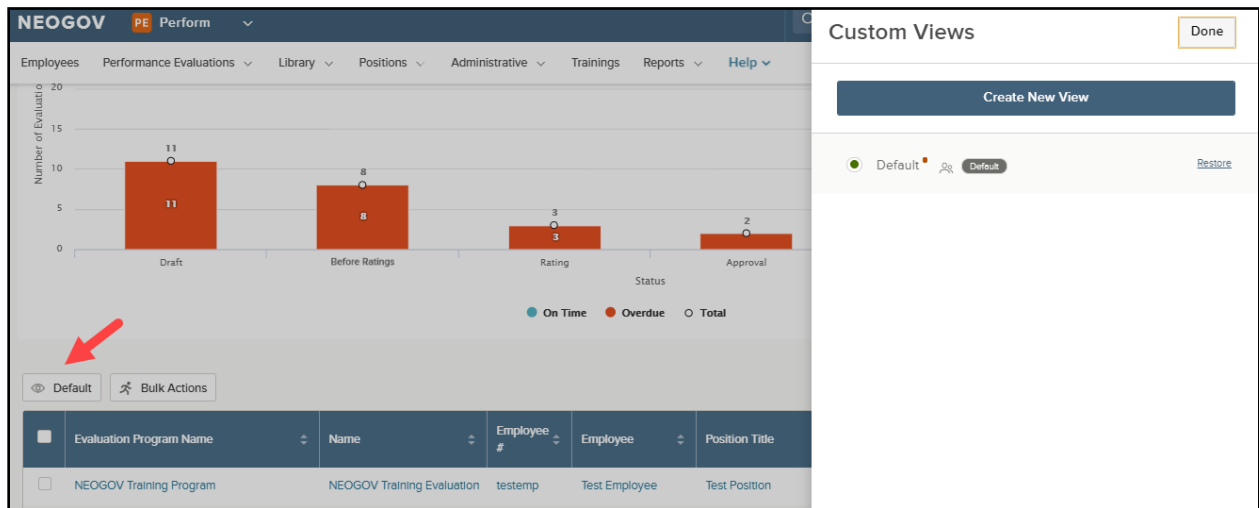


Figure 80: Custom Report View

While creating a custom view, the following options are available to customize delivery of a report based on your custom view:

Figure 81: Scheduled Report Delivery Options

1. **Schedule Export:** Toggle **Active** or **Inactive**
2. **Send To:** Sets the recipient for the export. After selecting, search employees and select from the options presented

Name	Emp. #	Department	Division
Mike Shin	01	Customer Success	-
Mike Bolsinger	39	Major League Baseball	-
Manager Mike	91	Customer Success	-

Figure 82: Select Recipient of Report

3. **Report Type:** Select the format of the report, .CSV, .XLS or .PDF
4. **Frequency:** Select how frequently this view should be emailed: daily, weekly, monthly or annually

5. **Repeat Every:** Select what interval the frequency should be repeated
 - a. Select a weekly frequency to reveal options to select which day of the week for the report to be sent
 - b. Select a monthly frequency to reveal options to select on which day of the month the report should be sent
 - c. Select an annual frequency to provide options on which combination of month and day the report should be sent
6. **Send Report Starting On:** Select a date to start the report
7. **End Sending Report On (optional):** Select a date to end transmission of the report if desired

An email is sent to the designated recipient at the specified frequency with a link to download the report. Make sure the recipient is logged into the system to download the report. If at any time the scheduled report should be suspended, press the pause button displayed next to the name of the saved custom view.

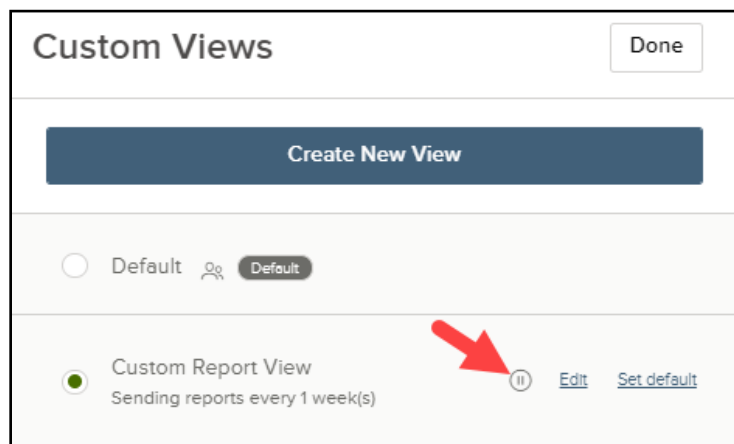


Figure 83: Pause Automatic Delivery of Custom View Report

Lastly, click on the **Bulk Actions** button to provide options for the report to be exported into either PDF, Excel, or CSV format. Select all the line items to export and select the format that works best for you.

The screenshot displays the NEOGOV 'Perform' interface. At the top, there are navigation tabs: Employees, Performance Evaluations, Library, Positions, Administrative, Trainings, Reports, and Help. Below this is a bar chart titled 'Number of Evaluations' showing counts for four statuses: Draft (11), Before Ratings (8), Rating (3), and Approval (2). A legend indicates 'On Time' (blue), 'Overdue' (red), and 'Total' (grey). Below the chart, there are two buttons: 'Default' and 'Bulk Actions', with a red arrow pointing to the latter. Below the buttons, it says '10 records are selected.' and a table with columns: Name, Employee #, Employee, Department, and Raters. The table contains three rows of data.

Name	Employee #	Employee	Department	Raters
NEOGOV Training Evaluation	testemp	Test Employee	Test Department	Test Ma
Sutherlin PD Review	testemp	Test Employee	Test Department	Test Ma
Sandbox Test Program	43	McManus Baldwin	Quality Control	Keyser S

On the right side, an 'Actions' sidebar is open, showing 'EXPORT ACTIONS' with three options: 'Export to PDF', 'Export to Excel', and 'Export to CSV'. Each option has a corresponding icon (PDF, XLS, CSV). A 'Done' button is at the top right of the sidebar.

Figure 84: Export Grid

Evaluation Status By Department Report

The **Evaluation Status by Department** report displays the various statuses of evaluations in your department, for yourself and your direct and indirect reports, with an easy to digest graph and grid. To filter what the graph displays, click the filter button for the graph.

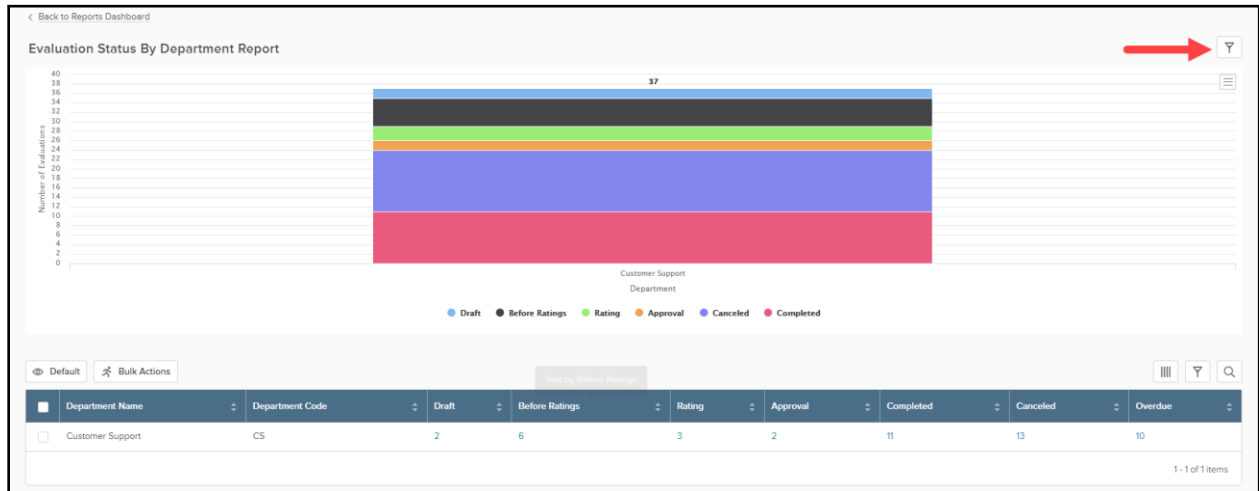


Figure 85: Evaluation Status by Department Report

Select from the options the Filters you'd like to apply. You may choose to include Archived Evaluations, or filter by a range of due dates.

Additional Filters Cancel

Evaluation Type

Probation Periodic

Include Archived Evaluations

Yes

No

Due Date

All

Specific date range

Figure 86: Filters by Evaluation Status by Department Report

Exporting and printing the graph are available for this report as well.

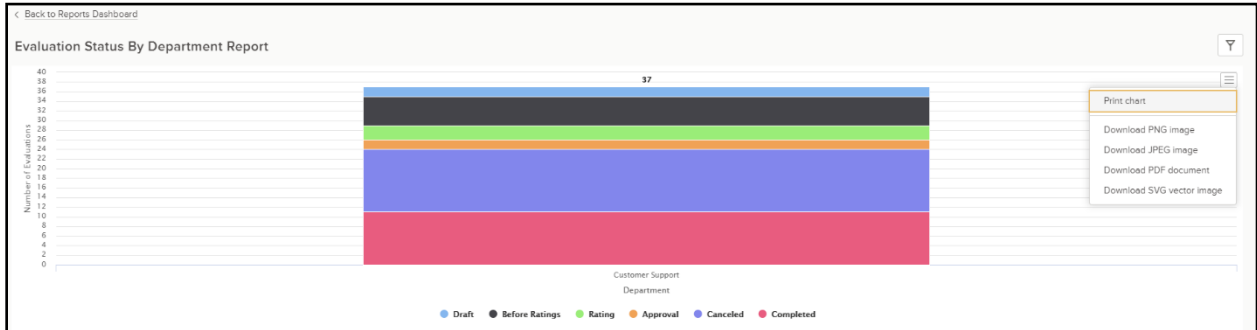


Figure 87: Export Graph

Click on any link in the grid to automatically re-route you to the performance evaluation list with filters applied to show only the evaluations that were represented in the **Evaluation Status by Department** report.

Task Status Report

To drill down further into the status of each individual evaluation, use the **Task Status** report to view a summary of all tasks and their current statuses, including those in a pending or completed state.

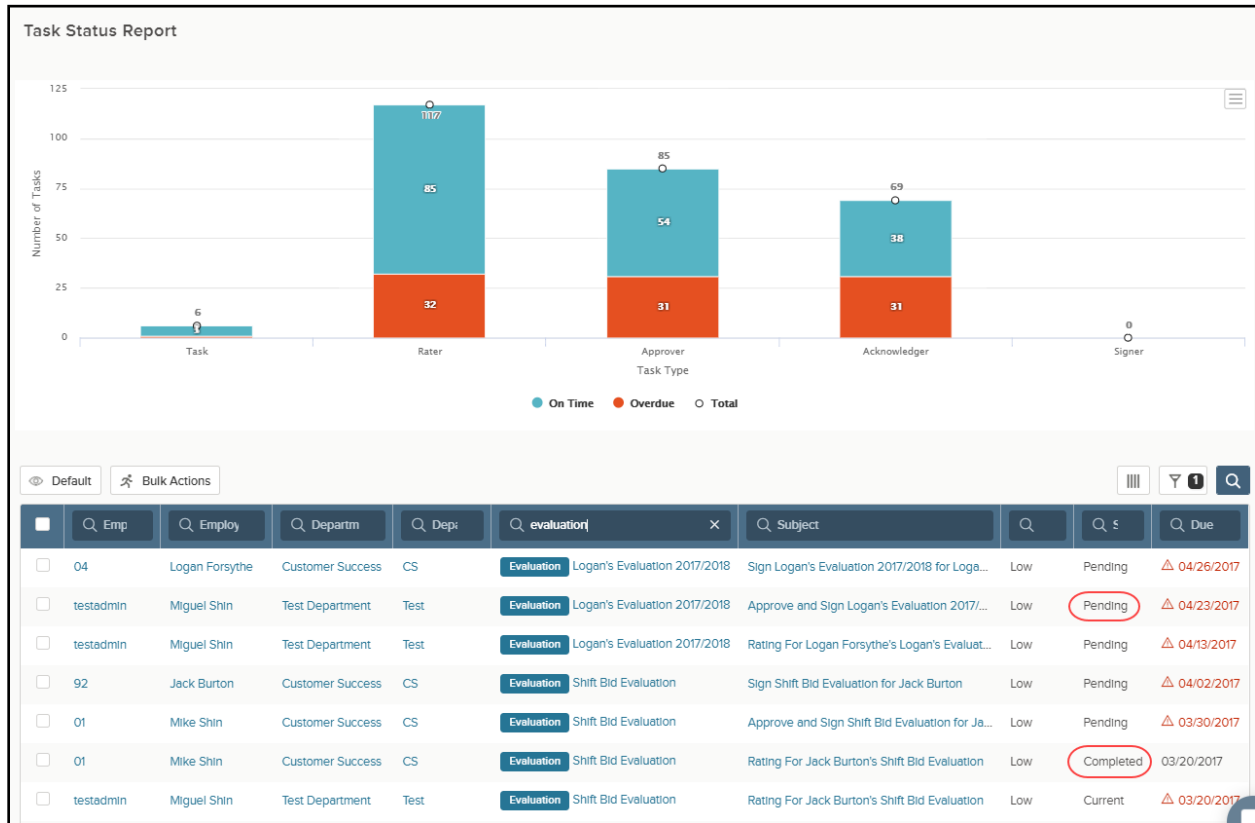


Figure 88: Task Status Report

The interactive graph displays all tasks by task type including but not limited to *Manual, Rating, Approval, Acknowledgment* tasks, and *Signature* tasks. Click on the blue or red portions of the columns to filter the grid below to show either the on-time or overdue tasks for each type. As is the case with the **Evaluation Status Detail** report, you can export the graph.

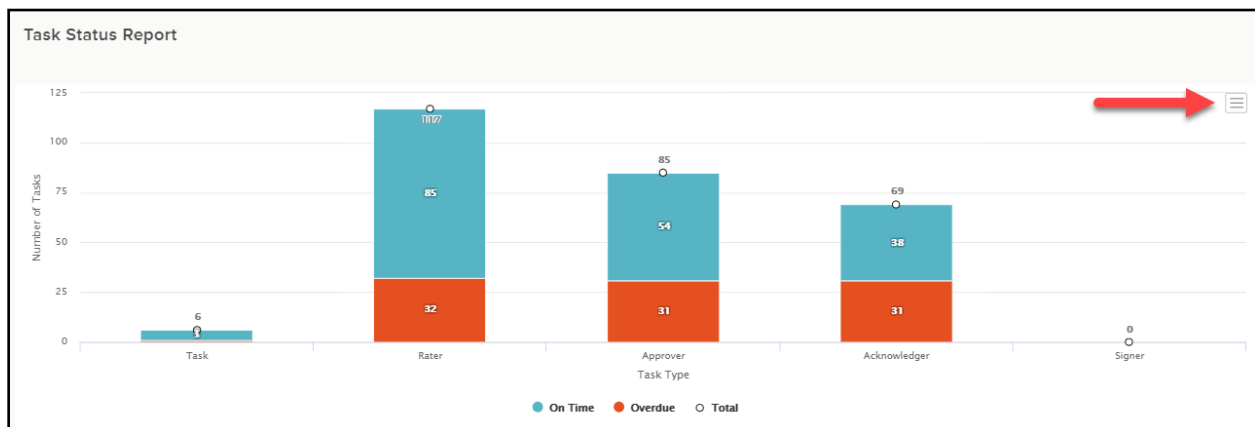


Figure 89: Task Status Report Graph - Filter and Export

Other useful information found in the **Task Status** report includes scores for completed rating tasks. To demonstrate, we have added the *Task Type* column and the *Overall Score* column. The highlighted example is a *Rater* task where the status is *Complete*, and the score for this rating task that was completed by Mike.

Emp	Employ	Departm	evaluation	Subject	Due	Task	Overall Score
04	Logan Forsythe	Customer Success	Evaluation	Logan's Evaluation 2017/2018	Pending	Acknowledger	N/A
testadmin	Miguel Shin	Test Department	Evaluation	Logan's Evaluation 2017/2018	Pending	Approver	N/A
testadmin	Miguel Shin	Test Department	Evaluation	Logan's Evaluation 2017/2018	Pending	Rater	Pending
92	Jack Burton	Customer Success	Evaluation	Shift Bid Evaluation	Pending	Acknowledger	N/A
01	Mike Shin	Customer Success	Evaluation	Shift Bid Evaluation	Pending	Approver	N/A
01	Mike Shin	Customer Success	Evaluation	Shift Bid Evaluation	Completed	Rater	150

Figure 90: Overall Score for Completed Rating Task

You can also report on any comments that have been added to manual tasks by adding the *Comment* column. Click on the columns button and select *Comment* from the list to add it to the grid.

Columns Done

- Employee #
- Employee
- Department
- Related to
- Subject
- Status
- Due Date
- Task Type
- Overall Score
- Evaluation Program Name
- Completion Date
- Comment**
- Division Code

Figure 91: Add Comment Column

Comments can also be included on evaluation printouts for all required and optional manual tasks. Note that this feature does not capture comments for rating tasks.

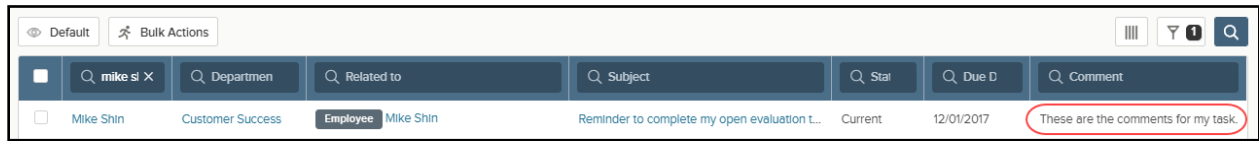


Figure 92: Comments for Manual Tasks

Approval Status Report

The **Approval Status** report also opens up a table displaying the current approval steps on evaluations. By default, the graph is configured to show the employees with the most current approval steps awaiting their action across all of your direct and indirect reports. Overdue steps are denoted in red. Click on the desired bar to automatically filter the grid to show only those items.

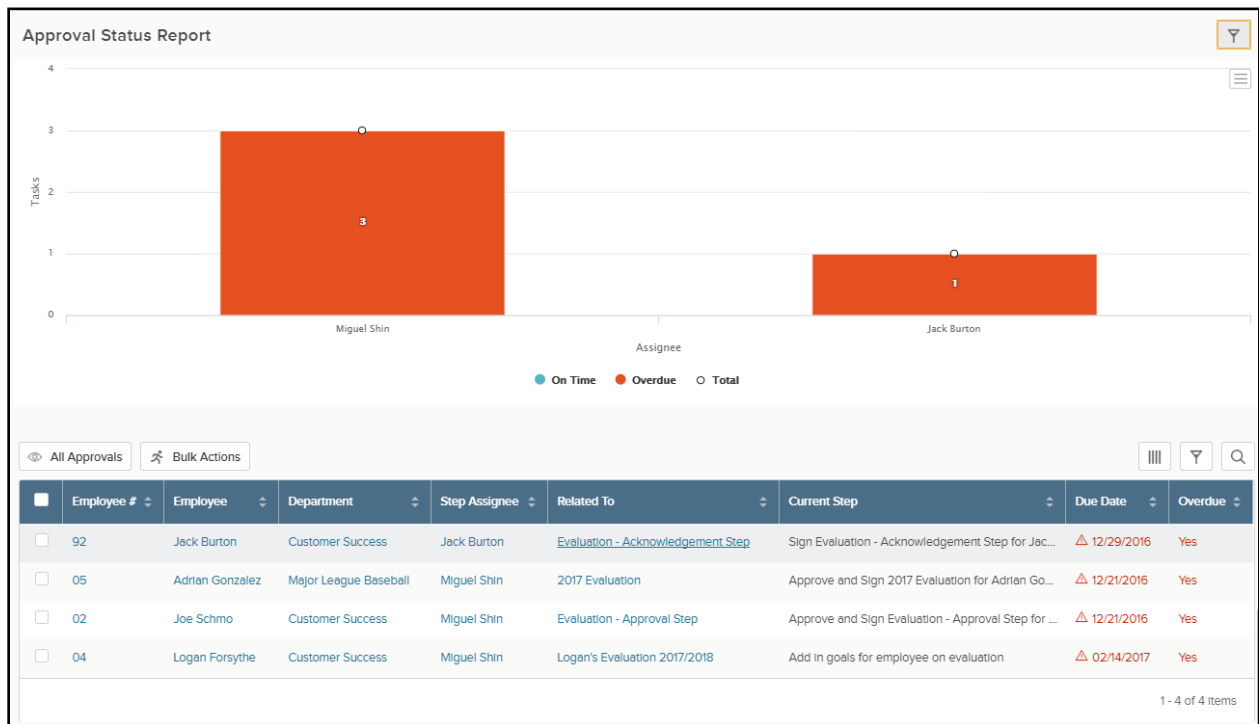


Figure 93: Approval Status Report

Click on the graph filter to open up the Approval Status Filters options.

Approval Status Filters

Cancel Save

Chart Type

By Assignee

By Department

Department

All

Active departments

Specific departments

Departments

Figure 94: Approval Status Report Filters

Change the chart to show the distribution of most current approval steps awaiting action by department instead of assignee, or to display assignees in specific departments only.

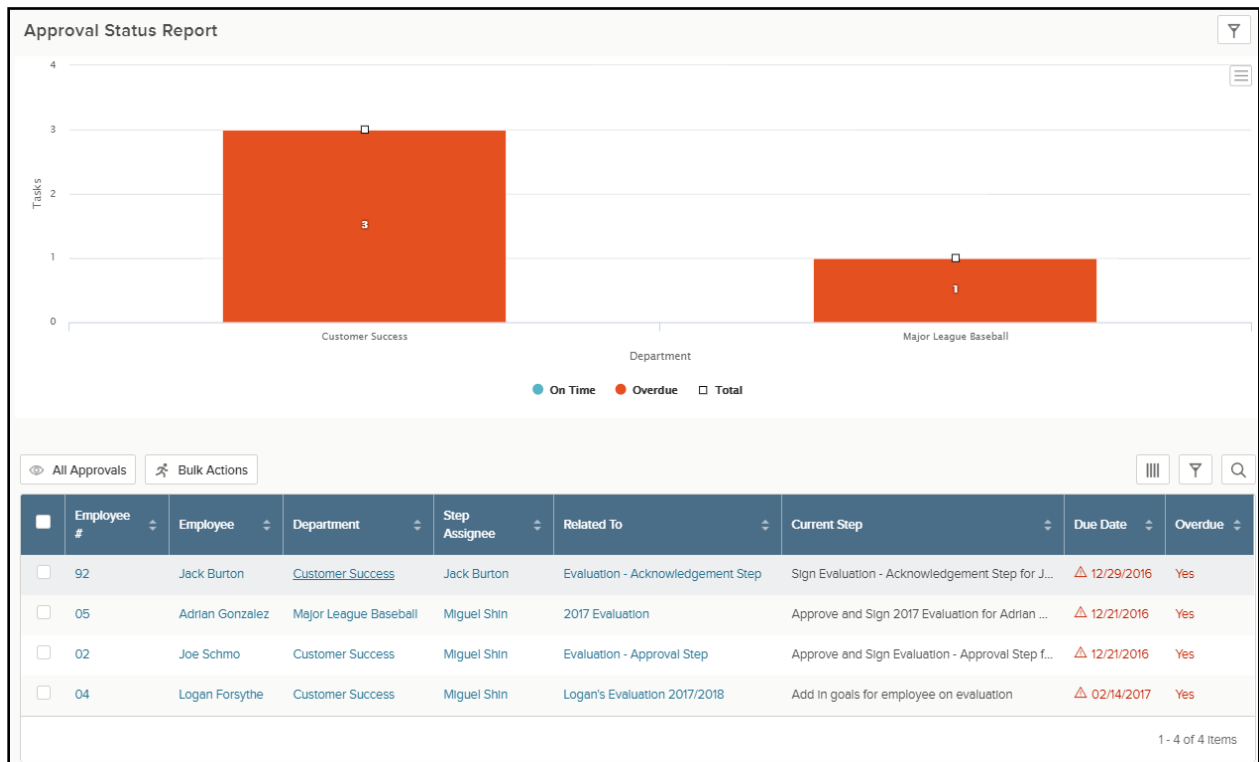


Figure 95: Approval Status Report - Distribution by Department

This report can be used to help identify which evaluations are being held up during the approval process. Add the *Remaining Steps* column to see how many steps are left in the process before an evaluation is completed.

Employee #	Employee	Department	Step Assignee	Related To	Current Step	Due Date	Overdue:	Remaining Steps
92	Jack Burton	Customer Success	Jack Burton	Evaluation - Acknowledgement Step	Sign Evaluation - Acknowledgement Step for J...	12/29/2016	Yes	1
05	Adrian Gonzalez	Major League Baseball	Miguel Shin	2017 Evaluation	Approve and Sign 2017 Evaluation for Adria...	12/21/2016	Yes	3
02	Joe Schmo	Customer Success	Miguel Shin	Evaluation - Approval Step	Approve and Sign Evaluation - Approval Ste...	12/21/2016	Yes	3
04	Logan Forsythe	Customer Success	Miguel Shin	Logan's Evaluation 2017/2018	Add in goals for employee on evaluation	02/14/2017	Yes	3

Figure 96: Remaining Steps Column

You can add the *Process Section* column to discover which part of the evaluation process these approval tasks might be in: Before or After Ratings.

Employee	Department	Step Assignee	Related To	Current Step	Due Date	Overdue:	Remaining Steps	Process section
Jack Burton	Customer Success	Jack Burton	Evaluation - Acknowledgement Step	Sign Evaluation - Acknowledgement Step fo...	12/29/2016	Yes	1	After Ratings
Adrian Gonzalez	Major League Baseball	Miguel Shin	2017 Evaluation	Approve and Sign 2017 Evaluation for Adria...	12/21/2016	Yes	3	After Ratings
Joe Schmo	Customer Success	Miguel Shin	Evaluation - Approval Step	Approve and Sign Evaluation - Approval Ste...	12/21/2016	Yes	3	After Ratings
Logan Forsythe	Customer Success	Miguel Shin	Logan's Evaluation 2017/2018	Add in goals for employee on evaluation	02/14/2017	Yes	3	Before Ratings

Figure 97: Process Section Column

Scheduled report delivery exists for the **Approval Status** report.

The screenshot displays the 'Approval Status Report' in the NEGOV system. The main view includes a bar chart showing task counts for 'Miguel Shin' (Assignee) with a legend for 'On Time' (blue), 'Overdue' (red), and 'Total' (grey). Below the chart is a table with columns: Employee, Department, Step Assignee, Related To, and Current Step. The table lists four entries for Jack Burton, Adrian Gonzalez, Joe Schmo, and Logan Forsythe.

The 'Custom Views' sidebar on the right is active, showing the following settings:

- Name: Enter view name
- Who can view this?: Only Me
- SCHEDULE EXPORT: Active (toggle on)
- Send to: Search employee
- Report type: CSV
- Frequency: Daily
- Repeat every: 1 Day(s)
- Send report starting on: 11/21/2017
- End sending report on: 11/22/2017

Figure 98: Approval Status Report - Automatic Export

Performance Rating Report

The next report we are going to highlight is the **Performance Rating** report, which shows the overall performance ratings for evaluations. As with the other reports, the first thing to highlight is the interactive chart. This chart shows the distribution of scores throughout your direct and indirect reports.

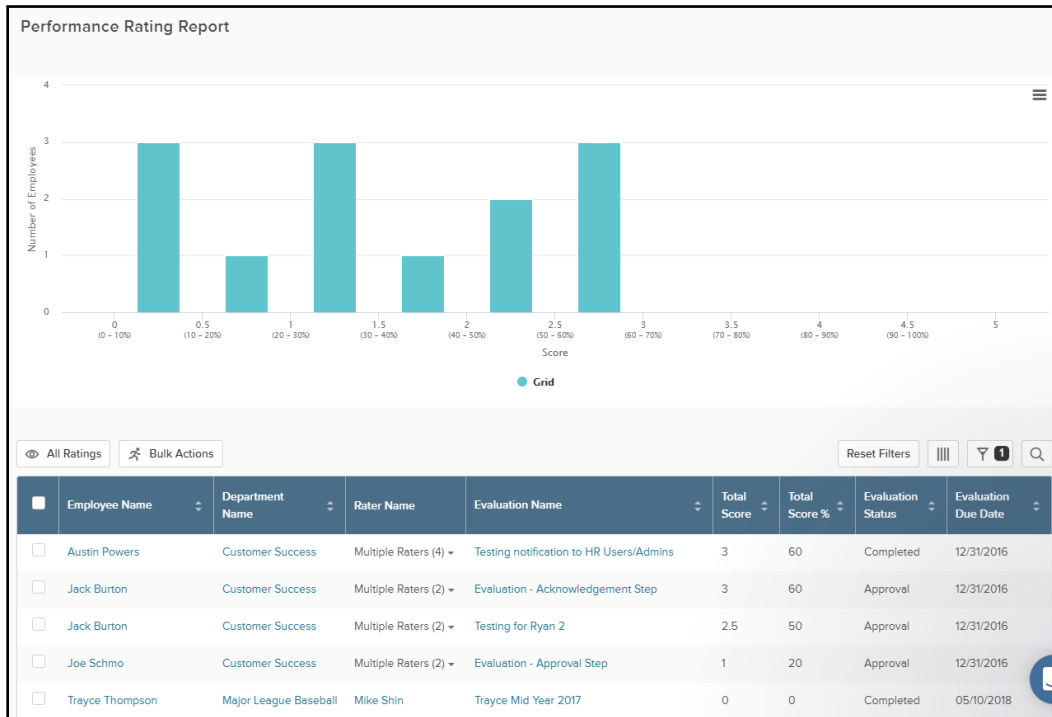


Figure 99: Performance Rating Report

The chart can be printed at any time or saved as an image or document.

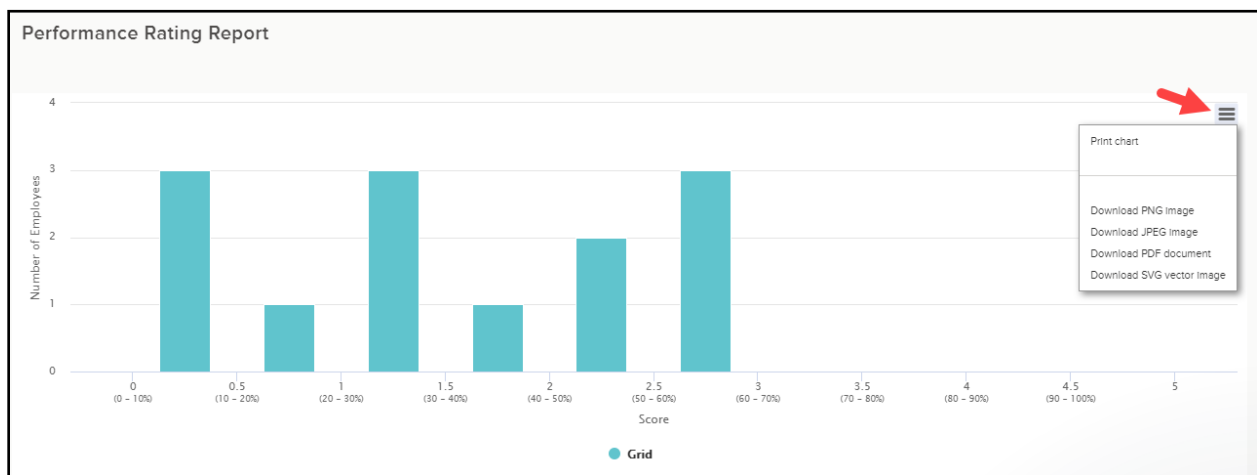


Figure 100: Print Performance Rating Report

Click on a bar in the chart to filter the grid below. Scores are listed as full composite scores for the evaluation and include the Overall Rating if available. In cases where there is more than one rater of record, the rater column is listed as Multiple Raters.

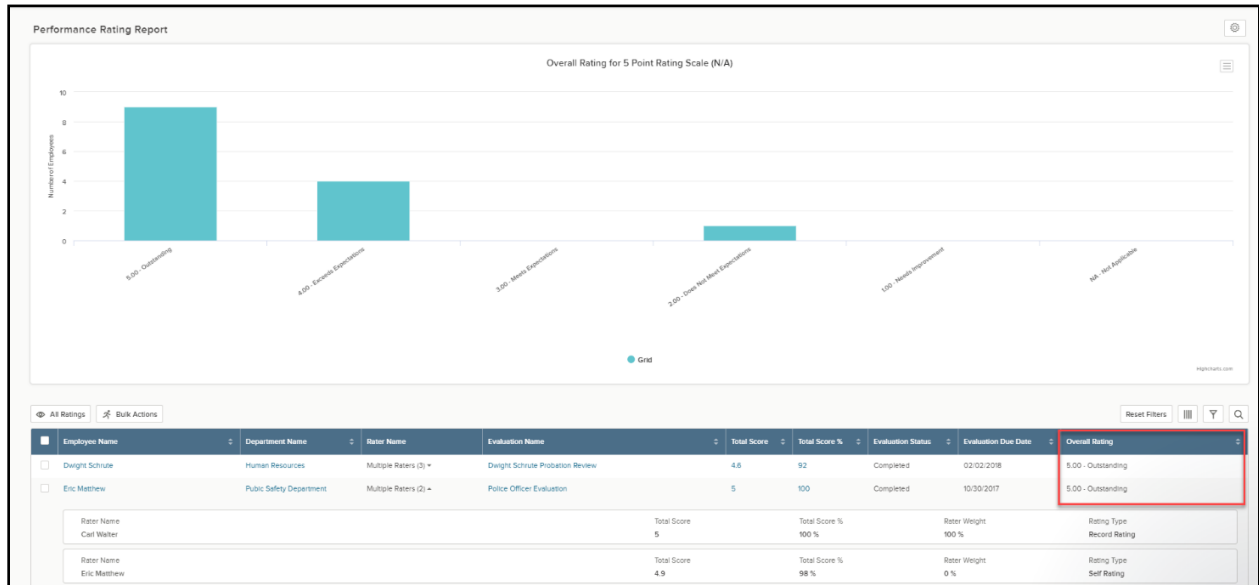


Figure 101: Overall Rating Chart Option Performance Rating Record

Click on the arrow next to the text to display the total score and total score percentage from each individual rater along with that rater's weight.

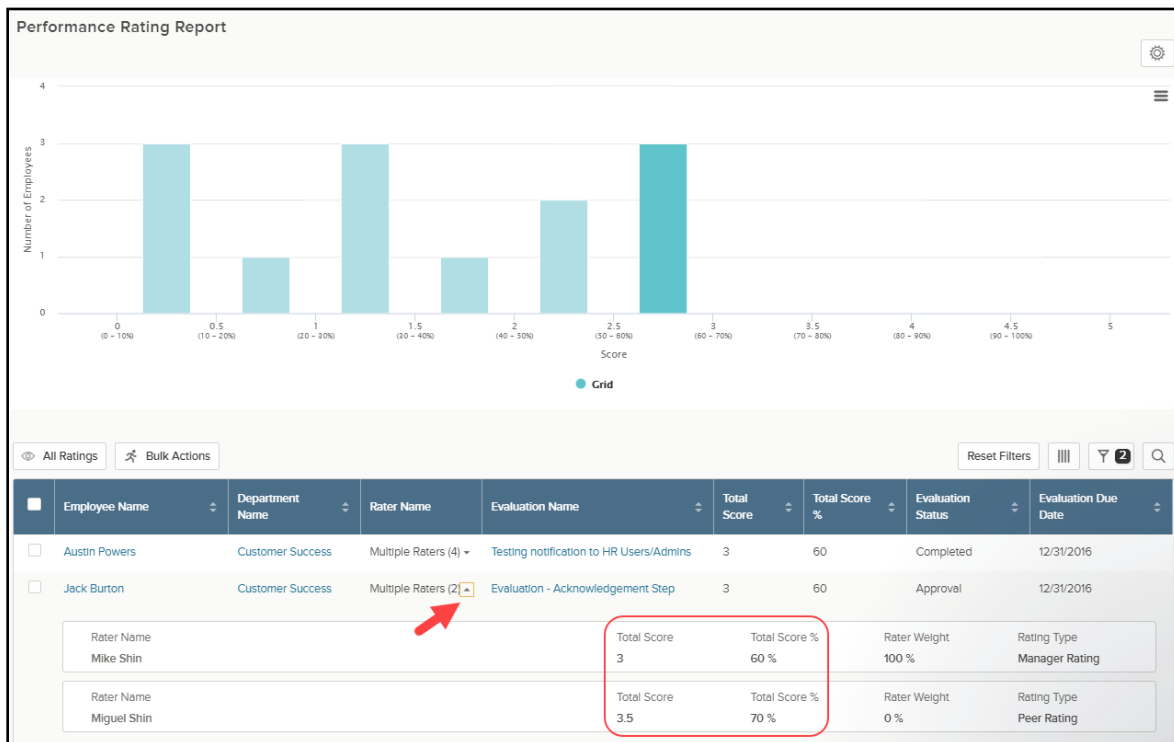


Figure 102: Multiple Raters and Scores

Similar to the **Evaluation Status Detail** report, filters can be added and custom views can be saved.



To export the individual rater information, use the **Task Status** report

The **Performance Rating** report can also accommodate automatic exports of custom views.

The screenshot displays the 'Performance Rating Report' interface. At the top, there are navigation tabs for 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Trainings', and 'Reports'. The main content area features a bar chart titled 'Performance Rating Report' showing the number of employees for various score ranges. Below the chart is a table with columns for 'Employee Name', 'Department Name', 'Rater Name', 'Evaluation Name', and 'Total Score'. A 'Custom Views' sidebar on the right provides options to name the view, set permissions, and schedule automatic exports. The 'SCHEDULE EXPORT' section is active, showing a frequency of 'Daily' and a repeat interval of '1' day, starting on 11/21/2017.

Employee Name	Department Name	Rater Name	Evaluation Name	Total Score
Austin Powers	Customer Success	Multiple Raters (4)	Testing notification to HR Users/Admins	3
Jack Burton	Customer Success	Multiple Raters (2)	Evaluation - Acknowledgement Step	3
Jack Burton	Customer Success	Multiple Raters (2)	Testing for Ryan 2	2.5
Joe Schmo	Customer Success	Multiple Raters (2)	Evaluation - Approval Step	1
Trayce Thompson	Major League Baseball	Mike Shin	Trayce Mid Year 2017	0

Figure 103: Performance Rating Report – Automatic Export

Item Ratings Report

To further drill down on performance ratings, we have the **Item Ratings** report, which looks at individual ratings to identify strengths and weaknesses among your employees and rating behavior across employees.

The chart displays up to 50 competencies sorted from highest average Total Score Percentage to lowest.

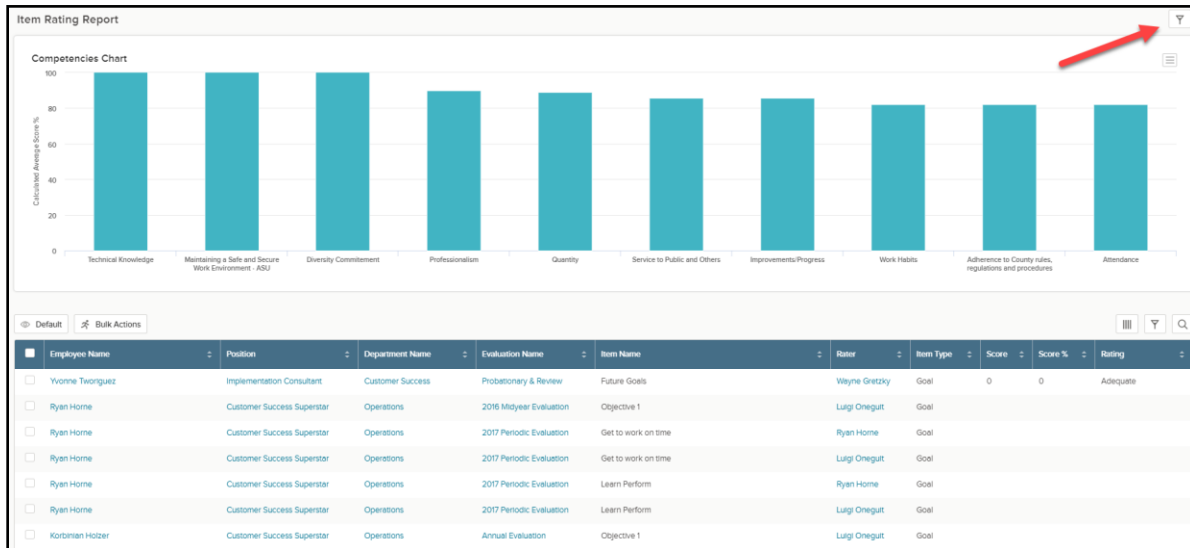


Figure 104: Item Rating Report

Within the Chart Filters on the top right, you can select between a Bar Chart and a Pie Chart. The Bar Chart displays a distribution of scores by competency while the Pie Chart displays a distribution by rating level and can be run with either a scored or non-scored rating scale.

Chart Filters

Cancel Save

Chart Type

Bar Chart ⓘ

Pie Chart ⓘ

Number of Items to Display

10 ▾

Score filter (%)

0% 100%

◀▶

Evaluation Due Date

All

Specific Date Range

Evaluation Type

Periodic

Probation

Figure 105: Chart Filters

An example of how the Bar Chart could be used would be to view all the different ratings across a single evaluation when that evaluation has multiple raters. In this example the employee was rated by several peers. In the bar chart, we can see all the raters that rated each evaluation item and how their scores compare to other raters. Hovering over the bar in the chart displays the average score of the raters as well as how many raters rated that competency.

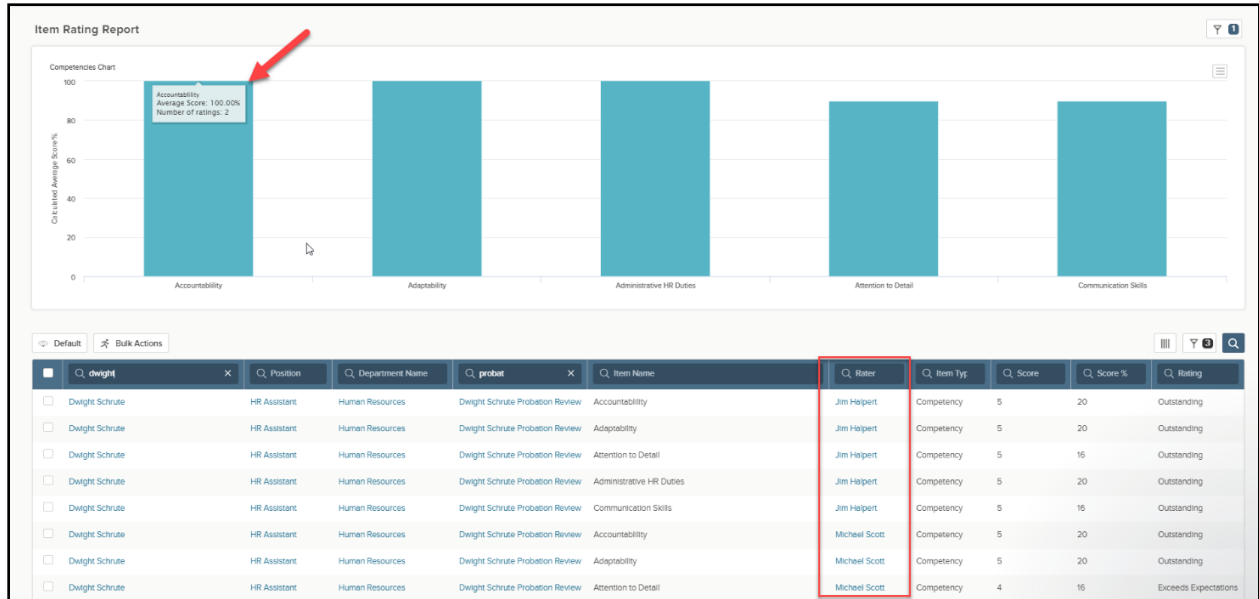


Figure 106: Multiple Raters for an Evaluation for an Employee

Another example of how this report can prove useful is to filter by a specific competency to see how all of your employees have scored, and how those scores range across position, or some other variable. Select the competency on the chart to have it reflect in the table below. Hovering over the competency bar shows the average Total Score Percentage and the number of ratings.

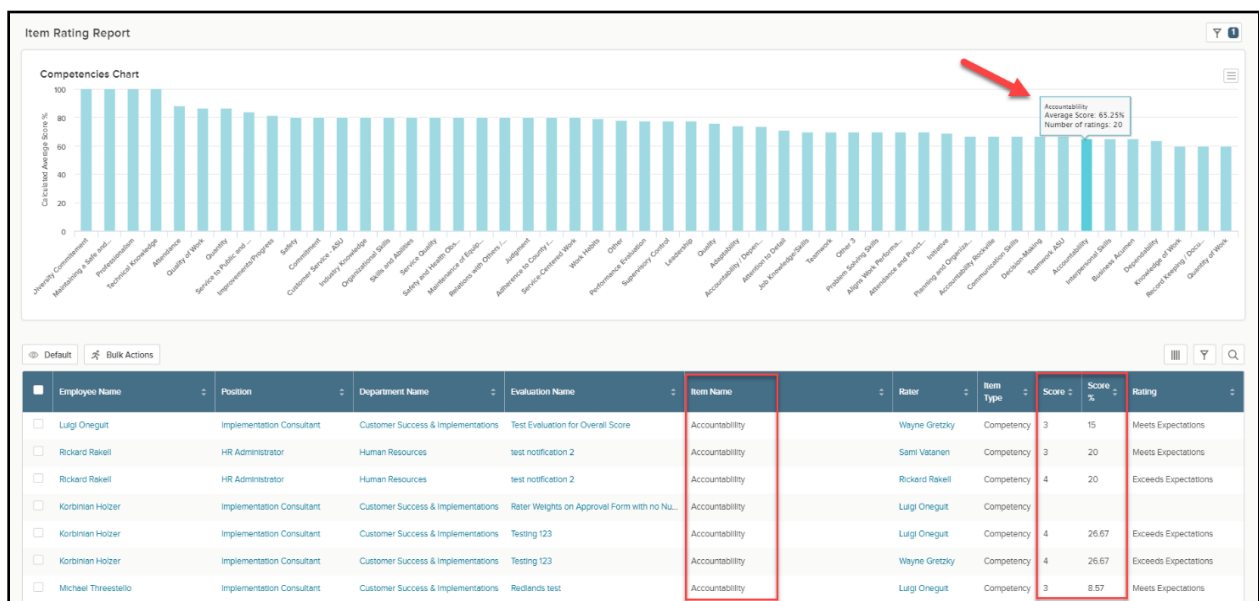


Figure 107: Multiple Ratings Across the Agency for a Common Competency

Remember that advanced filters can be used to provide specific views. For example, add a filter to show a score percentage below a certain threshold.

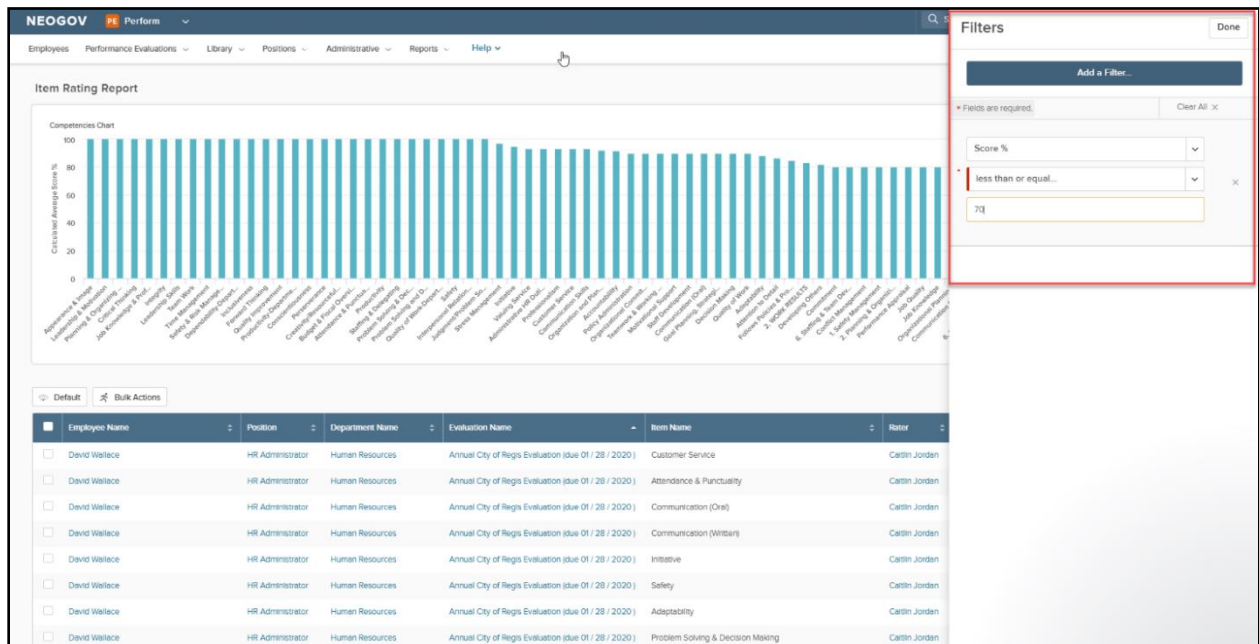


Figure 108: Advanced Filters in Reports

Then a custom view could be scheduled for automatic exports.

An example of how the Pie Chart can be used would be to see all of the evaluation items from your employees that received a certain rating. Hovering over the rating in the Pie Chart displays the number of ratings as well as the percentage out of all ratings that the rating was selected.

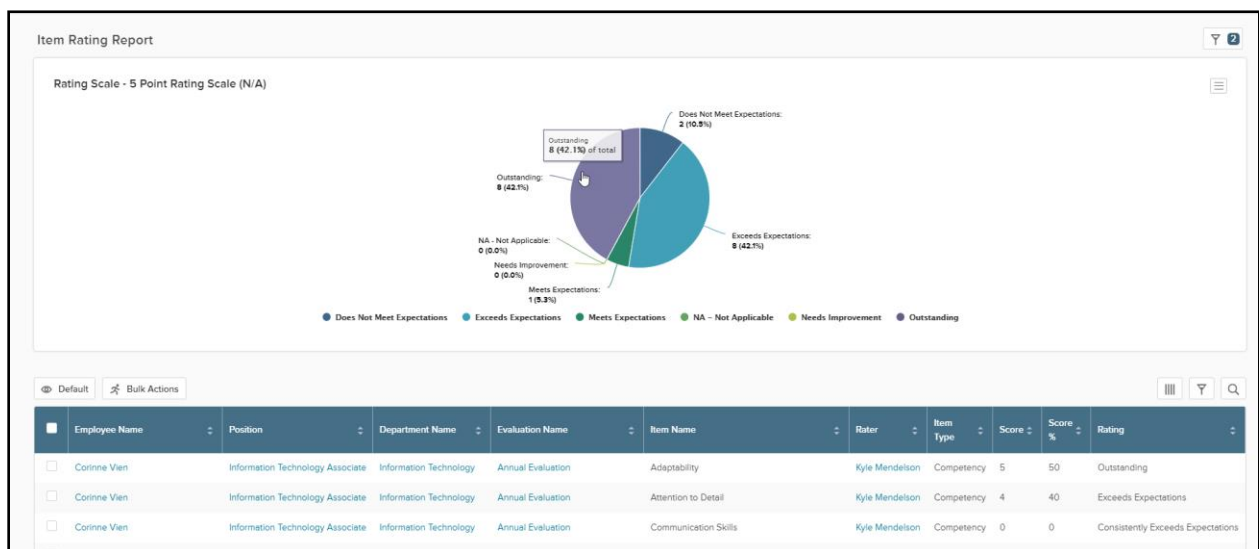


Figure 109: Item Rating Report Pie Chart

Clicking into the rating takes you to a separate bar chart that displays the counts of the competencies that received that rating. In this example, we see each competency that received a rating of “Outstanding” as well as the employee to whom the score belongs. Clicking into a competency updates the table to display all employees who received the “Outstanding” rating along with the evaluation information.

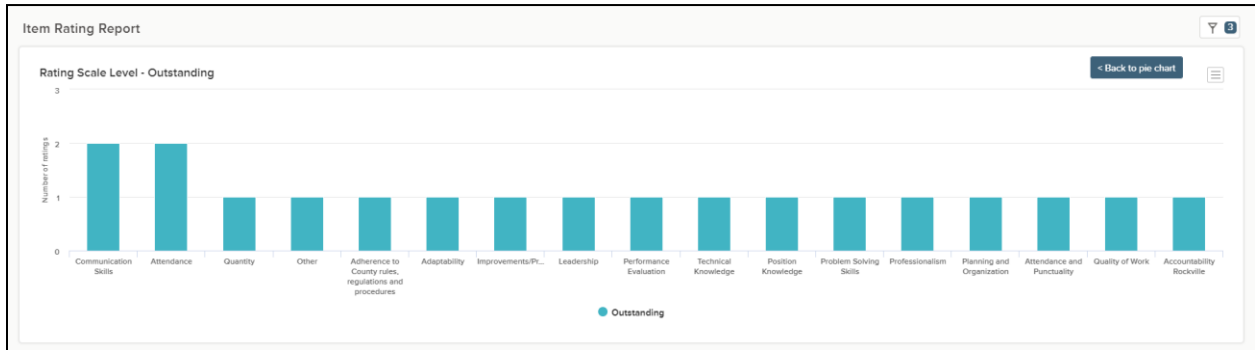


Figure 110: Rating Scale Bar Chart



The most commonly used reports by Managers are the Evaluation Status Detail Report, the Performance Rating Report and the **Task Status** Report

Tips and Tricks

This section covers best practices within the system.

Troubleshooting Browsers

All users are highly encouraged to use one of three supported browsers:

- Google Chrome
- Internet Explorer 11 or higher
- Microsoft Edge

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered are unlikely to be resolved. If you encounter any issues, the first step in trying to resolve the issue would be to clear the browser's *cookies and cache*. To do so, select: **Ctrl + Shift + Delete**.

This fix solves most user issues. If this still does not fix the issue, try using a different supported browser. If you are still encountering the issue, please take any relevant screen shots of the issue, such as an error message, and send this to your HR Admin. Include as much information as possible.

If you forget your password or username and use the Forgot password or username links, please check your spam inbox as sometimes the emails get filtered into there. If the email is not in there, please report to your HR Admin.

FAQs

Where can I view my completed evaluation?

Once an evaluation has been released to you, you can view the evaluation from the Performance Evaluation Detail page. To view your score, all ratings, and comments from Raters and Approvers, click on the Print icon.

Where can I reset my password or username?

When logging in to NEOGOV, there is a Forget Password and Forget Username link. Select the appropriate link and follow the directions. If you want to change your password, you can click the drop-down list associated with your name in the upper right-hand corner > Account Settings and enter the new password. The original password must be input first before changing. Please note that your account must be activated in order to reset your password or username. If your account has not been activated, please contact your HR Admin.

How can I find out what browser I am using?

To find out what browser you are using, please go to <https://www.whatsmybrowser.org/>