NEOGOV PERFORM:
BHDDH *NURSE
USER GUIDE

Division of Human Resources
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For the purpose of this guide, the user ("Nurse") is a nurse in a supervisory role.

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Before You Use This Guide

Performance Development in HR may need to send you an activation link to activate your account if you have <u>never</u> used the NEOGOV system. Once activated, you may log into your *Perform* account and complete any assigned tasks. (*IF YOU COMPLETED YOUR OWN ONBOARDING EXPERIENCE IN NEOGOV ONBOARD, OR PARTICIPATED IN THE PERFORMANCE DEVELOPMENT PROGRAM IN THE PAST, OR USE OTHER MODULES IN THE SYSTEM, YOUR ACCOUNT IS ALREADY ACTIVE)*

OVERVIEW

The Assessment

The Department of Behavioral Healthcare, Developmental Disabilities & Hospitals (BHDDH) assessment process for nurse supervisors is an annual cycle. The assessment is a periodic appraisal of a nurse's performance, against factors required by accreditation and federal funding as well as the State's Performance Development Program, by his/her supervisor. It's an opportunity to assess the progress, praise accomplishments, and collaborate on goals to improve performance and help achieve the division's objectives.

The Process
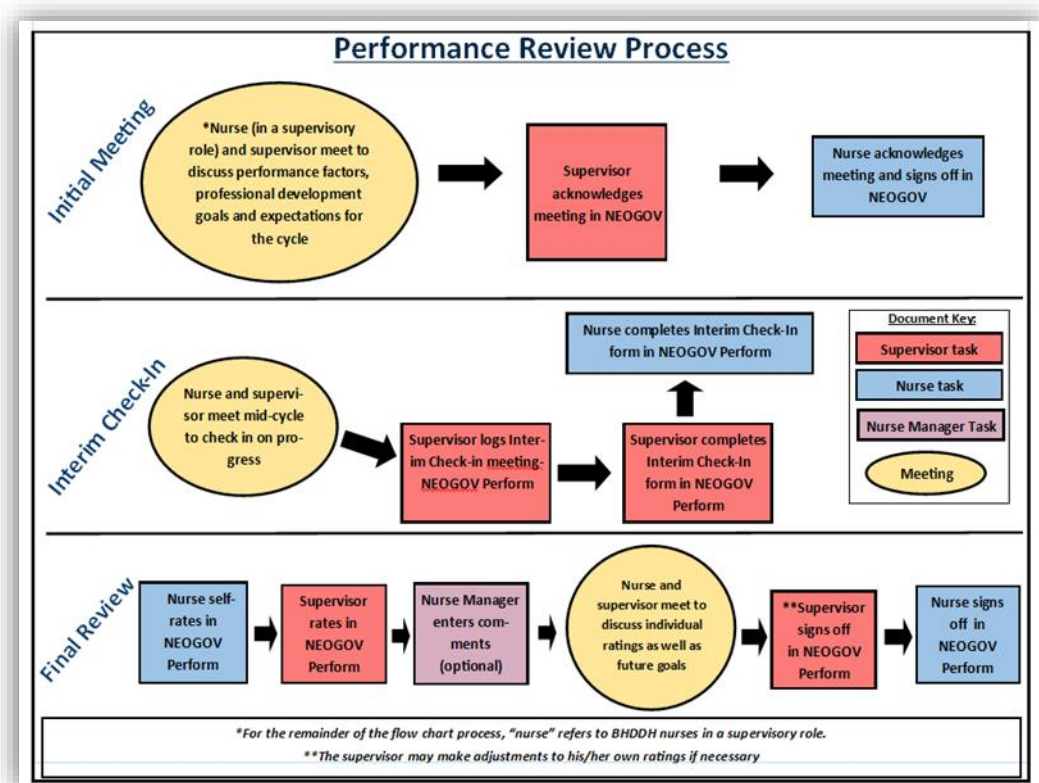
The first *required* step for you, the nurse in a supervisory role, is at the very beginning of the cycle- when you will meet with your supervisor. Your supervisor will notify you of the meeting.

- At this meeting, you will discuss the evaluation criteria you will be rated on at the end of the cycle (expectations), and a discussion about your career goals and what steps you can start taking in terms of annual goals and professional development to get there.
- Once you have met, your supervisor will document the meeting in NeoGov and enter any overall goals and professional development activities you discussed.

The second step for you, at the mid-cycle point, is the "interim check-in" meeting and report. During this meeting, you and your supervisor will discuss progress related to performance factors and other professional development activities. Changes to your goals, if needed, can also be made at this time.
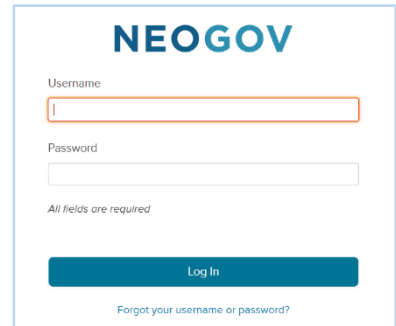
GETTING STARTED – LOGIN

To log into *Perform*, go to: https://login.neogov.com/

Enter your *username and password then click **Log In**:

Your username is your work/state-issued email address; your password is whatever you created when you initially activated your NEOGOV account.

If a password reset is required, click the "**Forgot your username or password?**" link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password. If you do not receive an email with password reset link, please check your "junk email" folder. If it is not there, contact the Performance Development Unit in HR at: doa.performancedev@hr.ri.gov as your account may need to be activated.

QUICK GUIDE - *Acknowledging Your Performance Appraisal*

At the very start of the annual cycle, after your supervisor has entered the content discussed in your meeting, your supervisor should let you know that it is ready for you (you may also receive an email notification from NeoGov) to go into NEOGOV *Perform* to acknowledge the content of your review, or in other words, you are aware of what you will be evaluated on by your supervisor at the end of the cycle.

1. Upon logging-in, you will land on your NeoGov dashboard. Once logged-in click on "**Performance**" in the side menu:
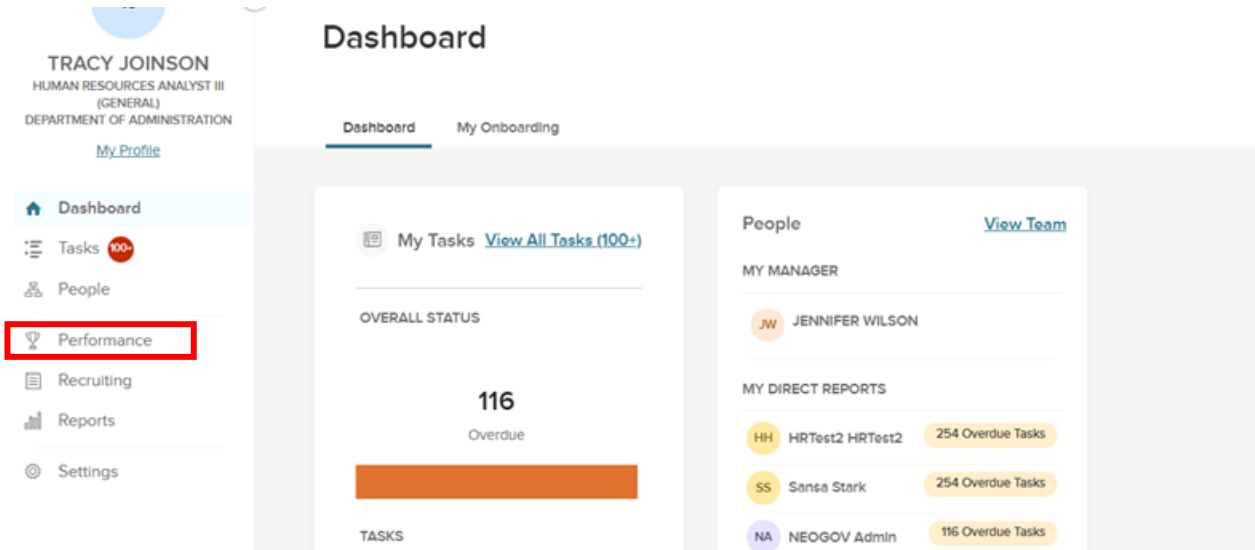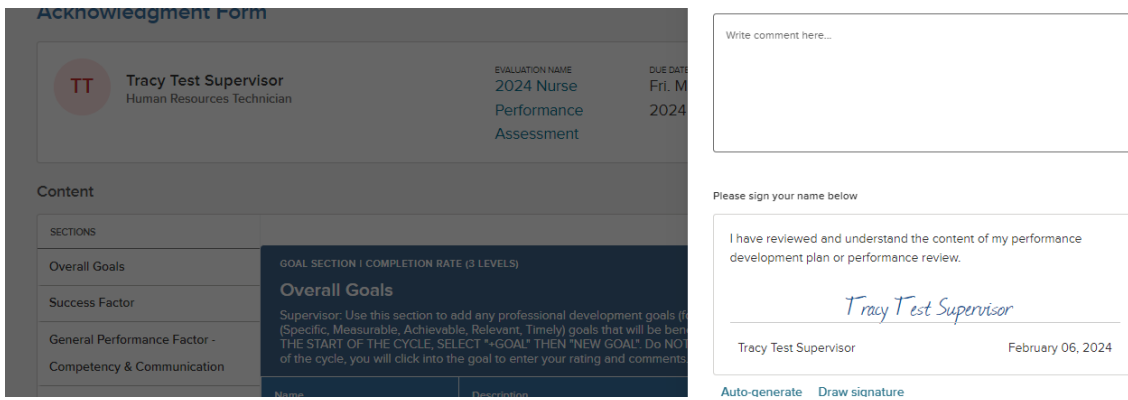

2. Click into the **Sign** task from the "**My Tasks"** section of your dashboard:
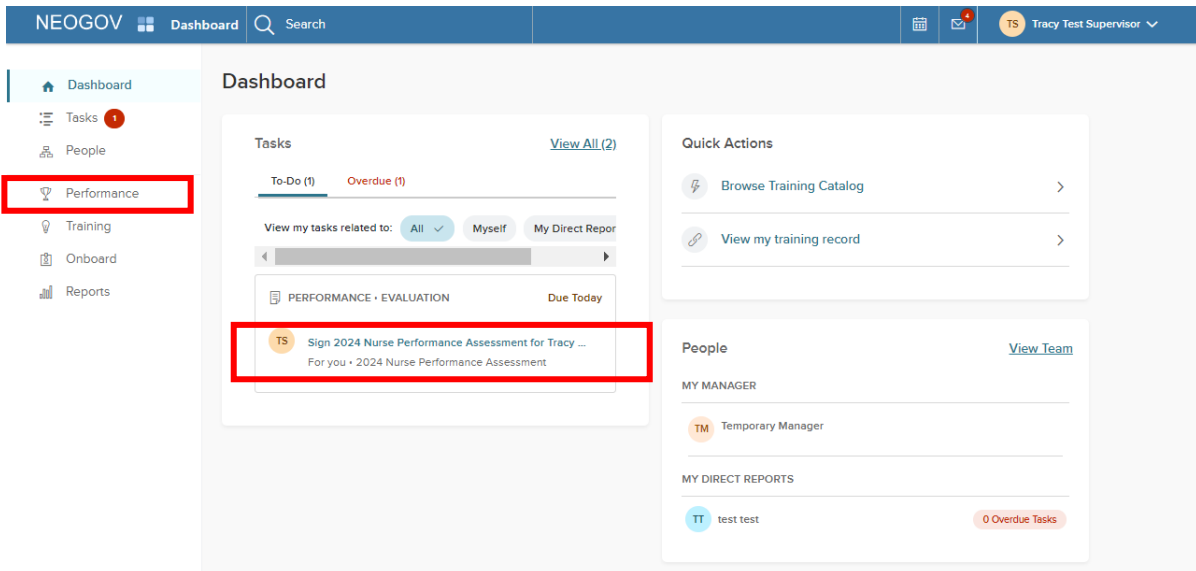
3. You should review the content of the assessment before submitting your signature. Click on a (a) **Content Section** on the left to display the items within that section which will display on the right.
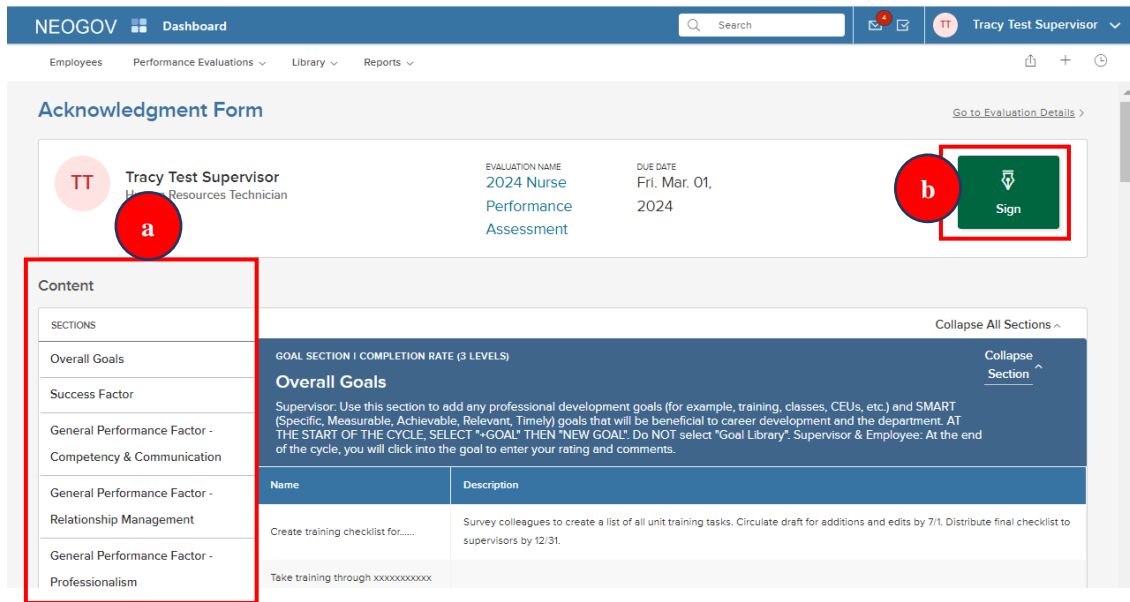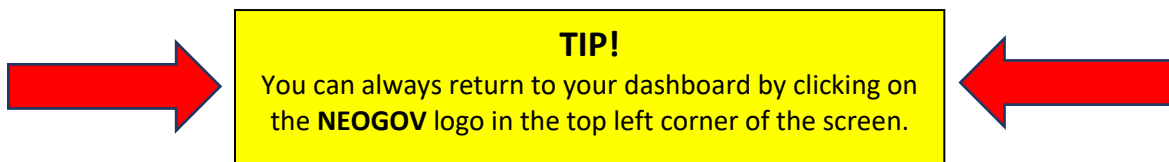

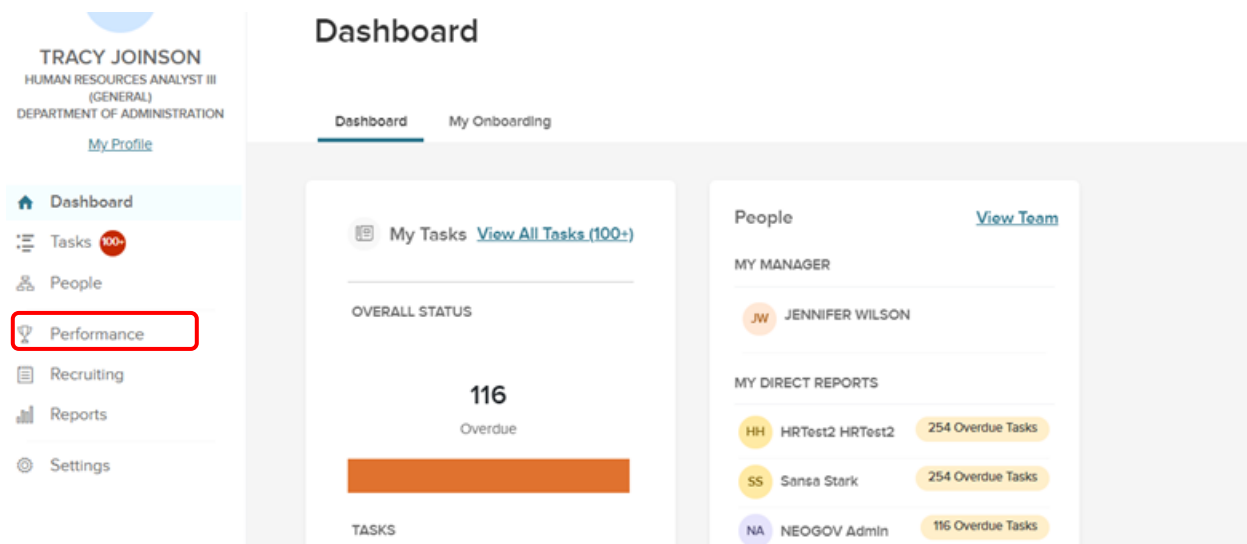4. To sign, click the (b) "**Sign**" button:
5. A fly-out will appear:

6. Comments may be entered. NEOGOV auto-generates an electronic signature. Select "**Submit**" *NOTE: Any comments entered will appear on the performance appraisal printout when saved.*

Once this is done, the task is removed from the "**Current**" task section of the dashboard. Your next milestone will be at the mid-point of the review period- the interim check-in.

TIP!
You can always return to your dashboard by clicking on the **NEOGOV** logo in the top left corner of the screen.
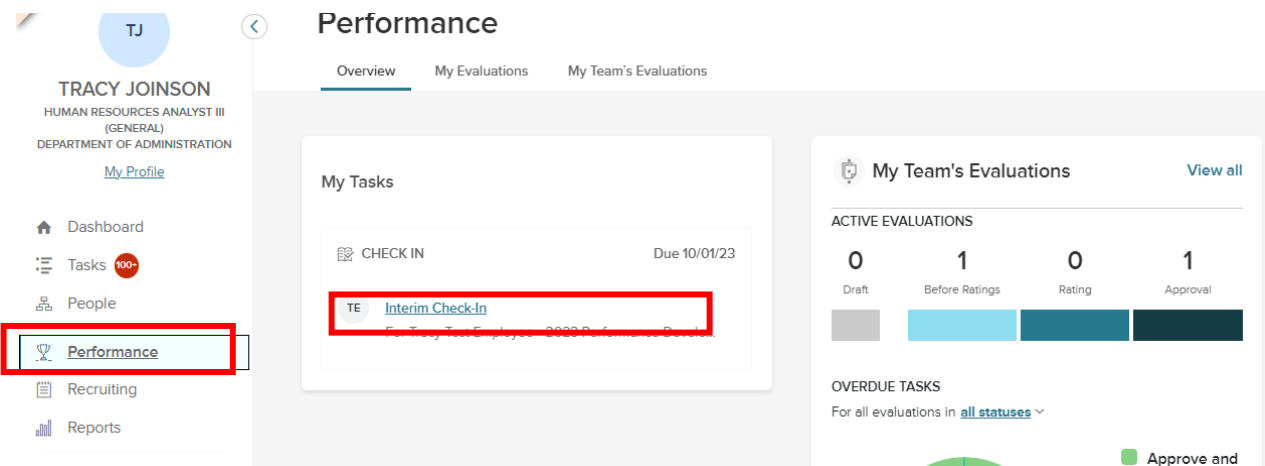
QUICK GUIDE – *Interim Check-in*

1. You will receive an email notification that the interim check-in milestone is approaching, however the first step is for your supervisor to schedule a meeting with you to discuss your progress related to the content of your performance assessment template.
2. After the meeting is held and your supervisor completes his/her two tasks related to this milestone (1) document the meeting the two of you had, and (2) complete the interim check-in "form", you will then *also* need to complete the interim check-in "form.
3. Navigate to your NeoGov dashboard, select "**Performance**" from the left menu:

4. Select "**Interim Check-in**" task from your Performance dashboard:

5. A fly-out appears; you must enter a status report into the two text boxes- first for the performance factors and then any overall goals and professional development.
6. Once complete, select "**Publish**" (a)

7. Note – if you would like to view the comments your supervisor entered during his/her interim check-in, you must leave your performance review. Go to your NeoGov dashboard (click on the NeoGov logo) and select "Performance" on the left menu and then "My Evaluations", and then select your current performance review:
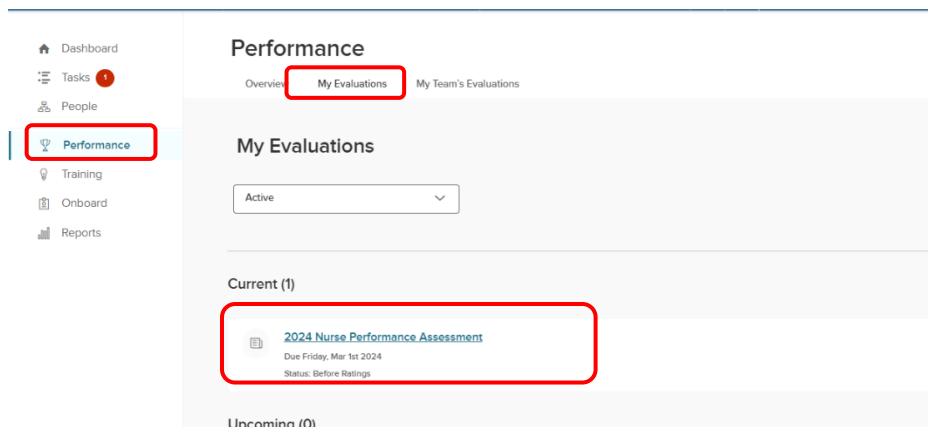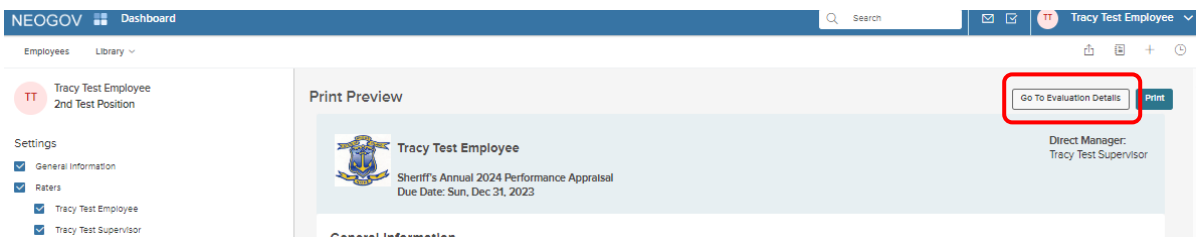
8. Select "Print", and then "Print Preview:
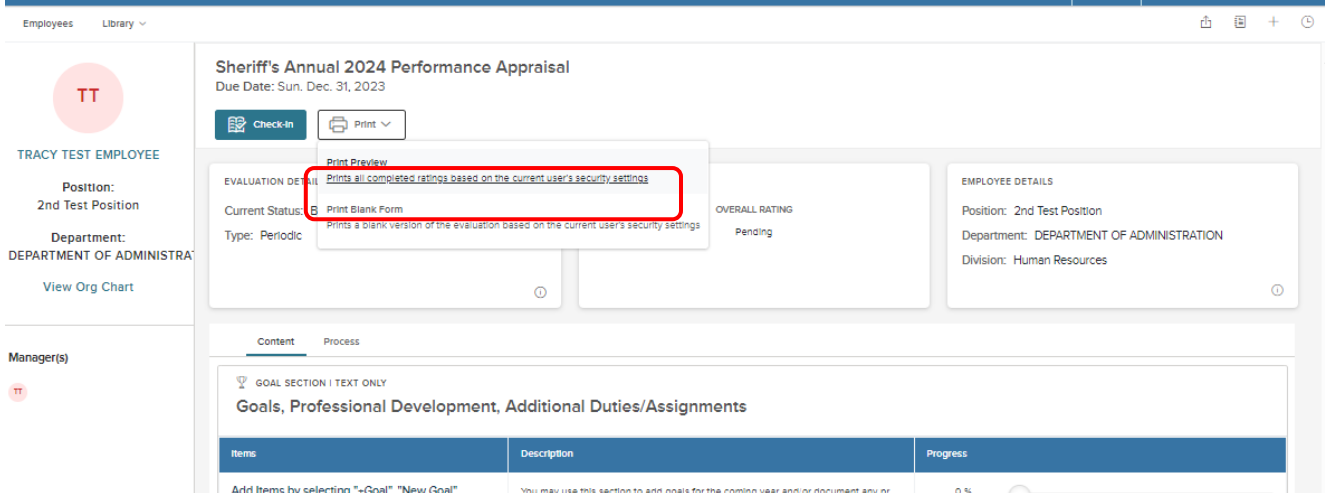
9. Scroll towards the bottom of your review and you will see the "Check-in Forms" comments entered by your supervisor for your overall goals and professional development activities and performance factors sections:
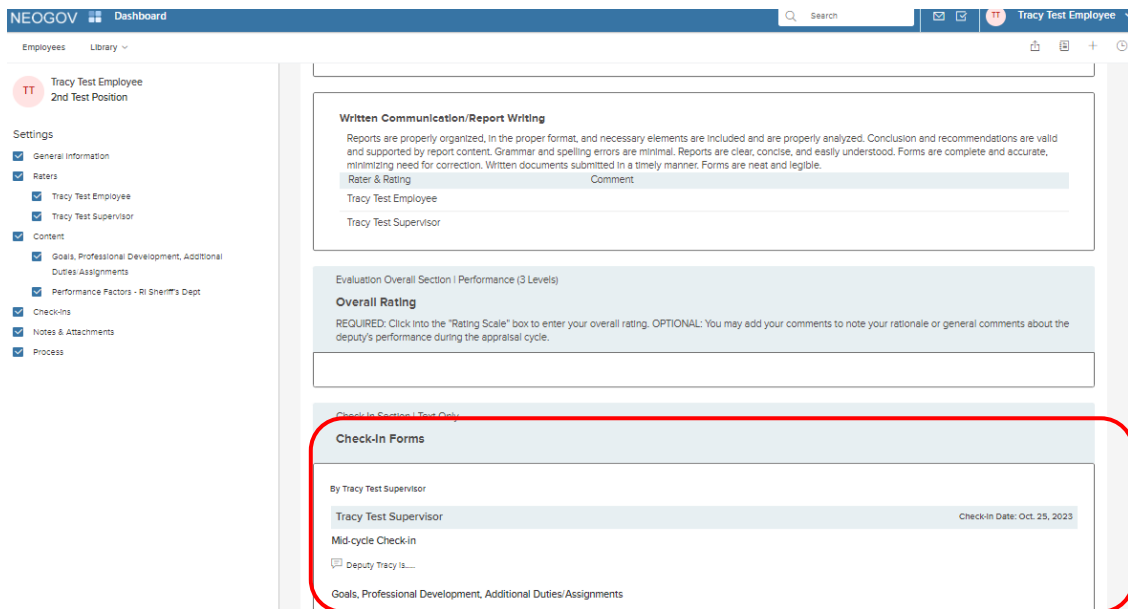

10. To return to your check-in task, select "Go to Evaluation Details" at the top of your review:

QUICK GUIDE – Final Milestone - *Self-Rating*

At the end of the cycle, you will receive a notification that it is time for you to complete a self-rating. *After you have done so*, your supervisor will receive a notification that it is time for him/her to complete his/her final/end-of-cycle rating.

1. Log-in to NeoGov and select "**Performance**" from the left menu:
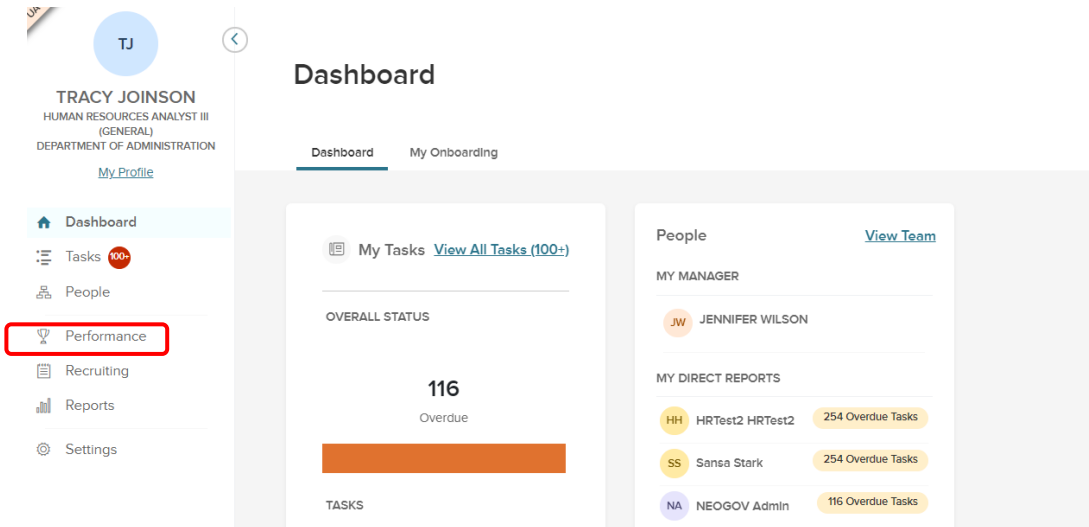
2. Click on the task to complete your **(Self)-Rating**.
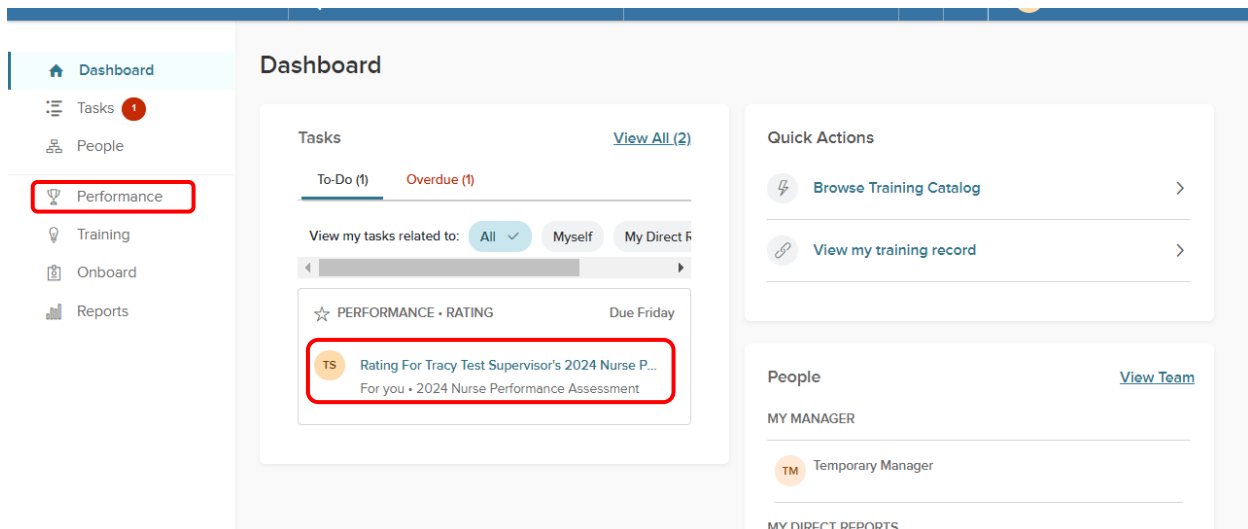
3. Navigate to the side bar to begin rating. Notice the red alert symbols ⚠ indicating that the section must be completed before moving forward with the process. If content was entered for the goals section, these should also be rated.
4. To rate an item, click (a) a section title and then (b) an item *within* a section, and a fly-out of the **Rating Card** appears (see below for further information).
5. To leave the rating card and return to the evaluation detail page, select (c) **"Go to evaluation details"**
6. Once you click on an item (b), a rating form and comment box will appear.
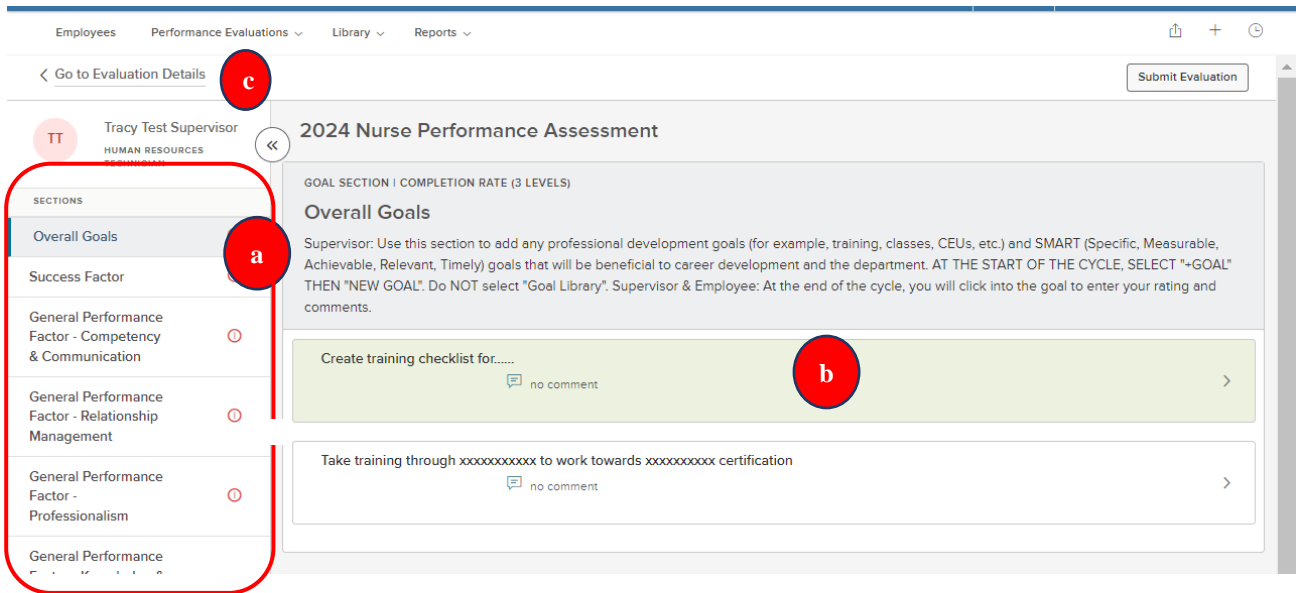
7. If the comment box is outlined in red, comments are required. You see a **Rating Scale.** To view a description of each rating scale value, select the (a) "**Show descriptions"** text and a flyout appears with detailed information. Select your self-rating. Note that entries from the interim check-in are available to view on the right (b).
8. Select "**Next**" to move to the next rating item (c).
9. When you have finished self-rating *all* items, select "**Done**" (d).
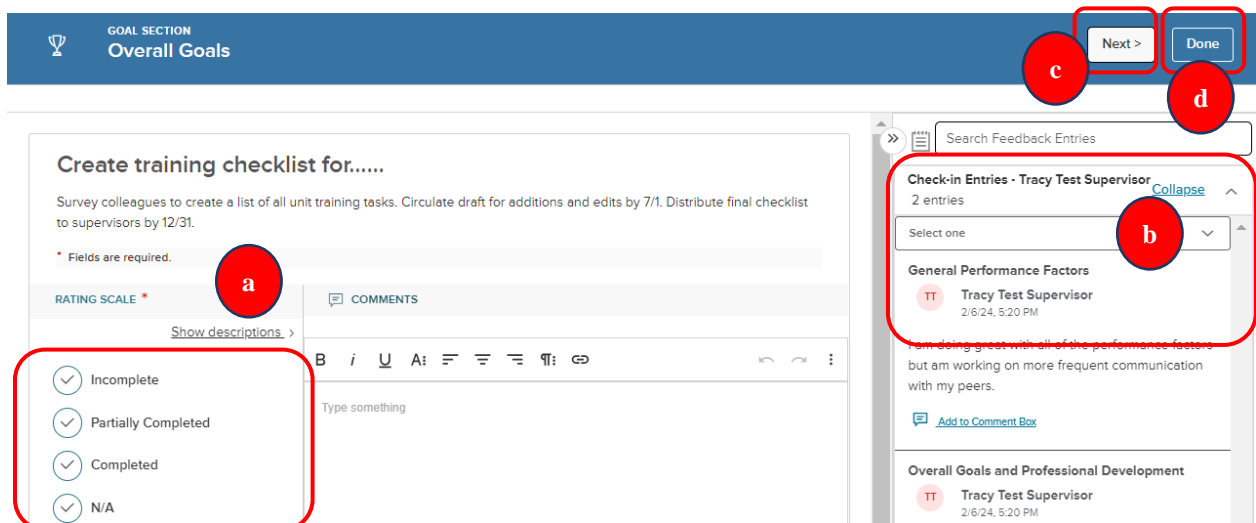
10. On the next screen, you can click "**Summary**" on the left side "Section" list and scroll to double check that all of your ratings and comments are what you intended. If you have missed anything, you will see the alert symbol in red next to the respective section; click into the section to address what is missing.

11. To print the current state of the performance assessment for your upcoming meeting with your supervisor, select the "**Summary**" section on the "evaluation detail" page, and then select "**Print Current State".**

12. Once all required ratings and/or comments are complete, select the "**Submit Evaluation**" button in the top right corner. **(Notice the alert symbols** ⚠ **have become green check marks indicating everything is complete).**
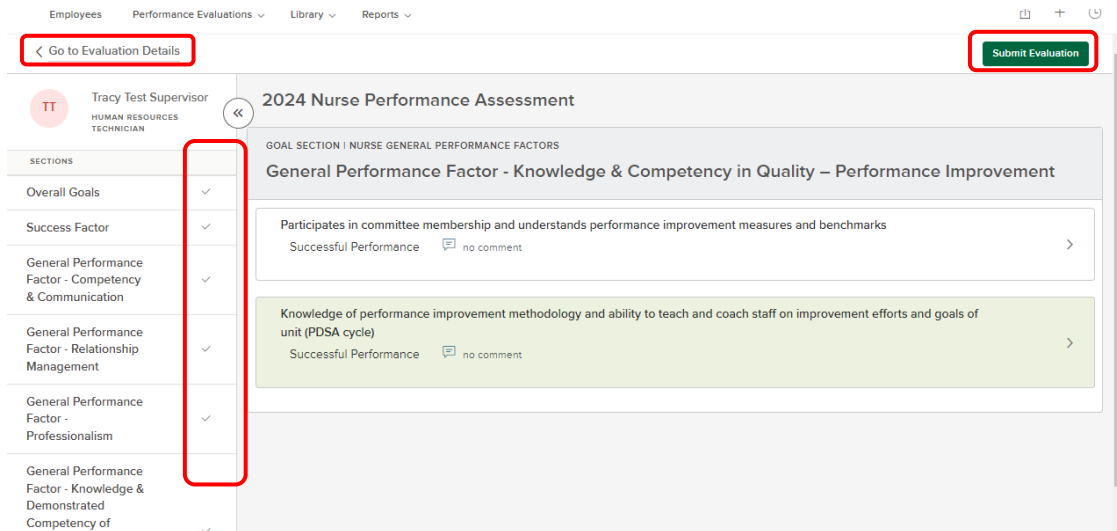
13. You will receive a confirmation message. Once it is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click "**Cancel"**. Otherwise, select "**Continue"**.
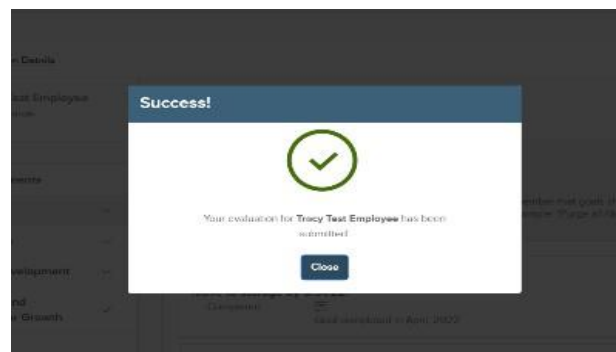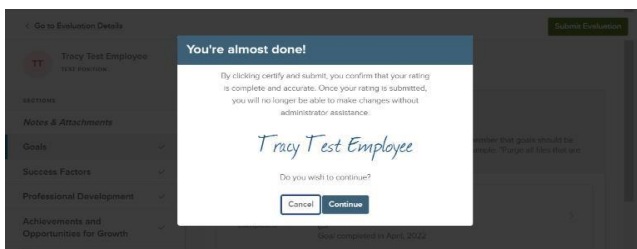

Once your self-rating has been successfully submitted, your manager will receive an email notification from NeoGov that you have completed the task and s/he will then complete his/her rating.

QUICK GUIDE – *End of Cycle Meeting and Signing Your Final Assessment*
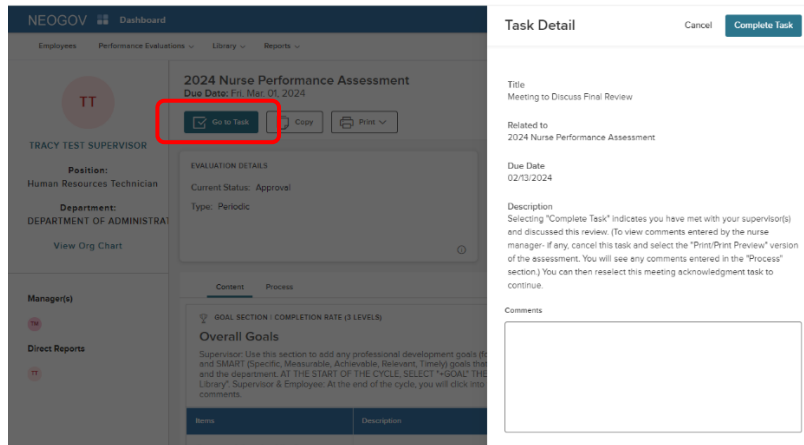
After your supervisor has completed the rating step, and after the meeting has taken place, you will sign-in to NEOGOV to 1) acknowledge the meeting, and 2) enter your final sign-off.

To acknowledge the meeting:

1. Sign-in to NEOGOV and navigate to your **Performance** dashboard to click on the meeting task to acknowledge the meeting:
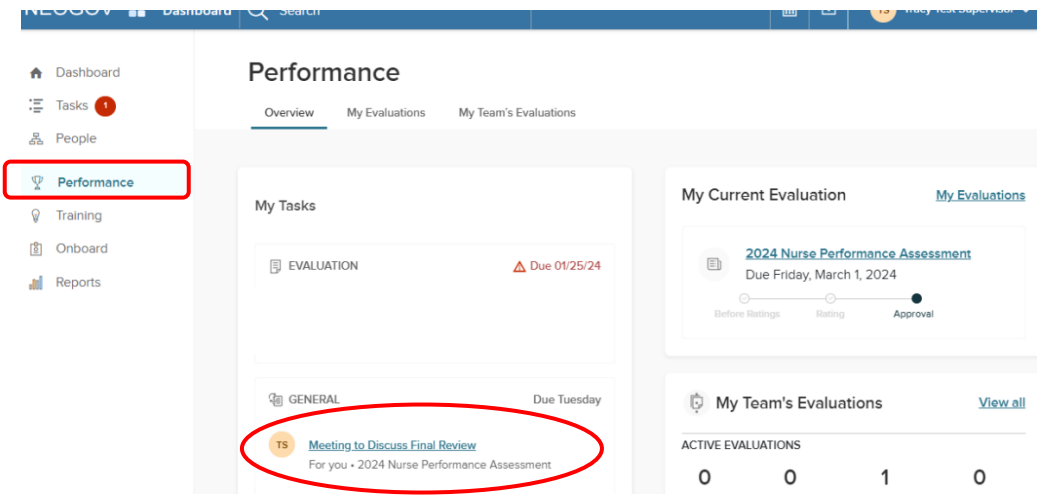
2. Select "Go to Task" on your performance review.
3. By selecting "Complete Task", you are acknowledging you met with your supervisor to discuss your respective final ratings.

TIP

Recall from the process flowchart that the Nurse Manager has the option to make comments on your performance appraisal after both you and your supervisor have completed your ratings. To view his/her comments, if any were entered, you will need to look at your assessment in print/print preview format. To do so, scroll to "My Evaluations" on your "Performance" dashboard, select the current performance assessment and you will see a print icon at the top of the plan. Return to your "Performance" dashboard to select the final sign-off task once complete. *If you experience an error when attempting to print, allow pop-ups from NEOGOV in your browser settings. Utilizing MS Edge browser is not recommended while using NEOGOV.*

4. Acknowledging the meeting will be immediately followed by the new task, which is to sign your final assessment, you are directed to the signature task by clicking the "**Sign**" button. If you are not completing the signature task *immediately* after acknowledging the meeting, you will click on the signature task from your "**Performance**" dashboard.

3. Navigate through the **Sections** by clicking on the section name; scroll through each section to review the ratings and any comments entered by your supervisor.
4. Note that you are able to see your supervisor's ratings for each factor.
5. Once you are finished reviewing, select the "**Sign**" button.
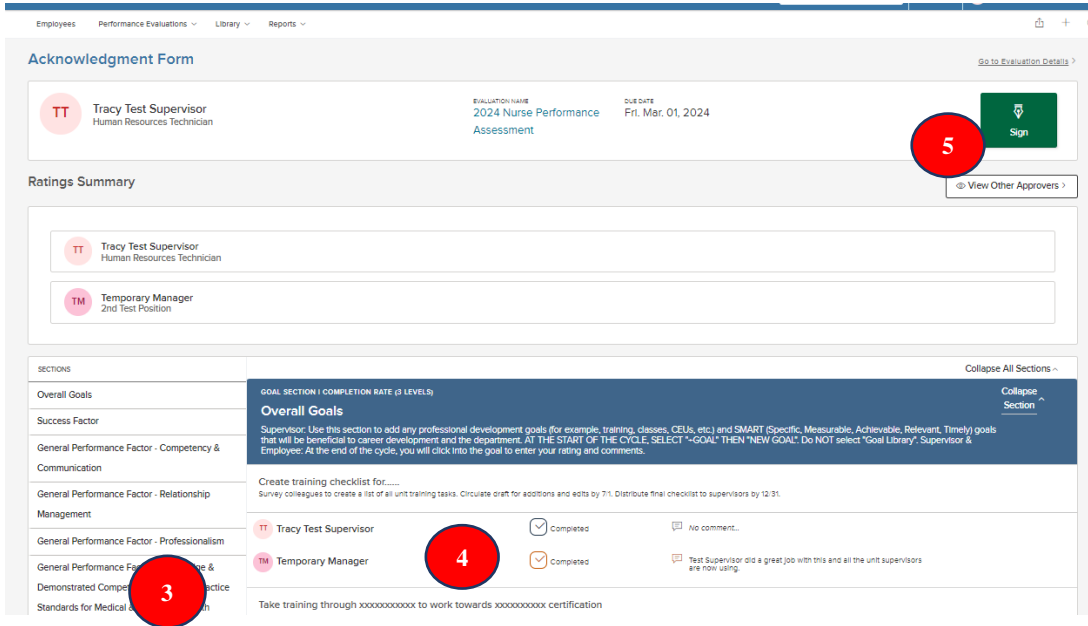
6. A fly-out appears with the signature box and an optional comment section. If you would like to draw your own signature using your mouse, click "Draw Signature" under the signature line.
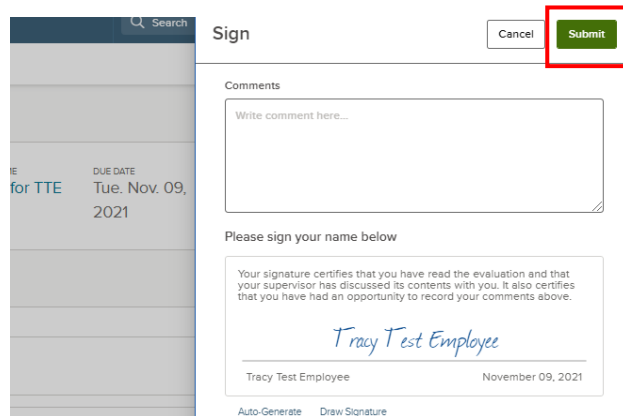

7. Once you have signed the assessment and selected, "**Submit**", an "**Evaluation was acknowledged!**" banner appears at the top of your screen. The review is archived in the NEOGOV system which you may review at any time in the future by going into the "My evaluations" section within the "Performance" menu of your dashboard.

   PLEASE NOTE: Signing the review does not indicate that you agree with the contents, rather that you received and reviewed it. If you have any concerns about the contents, please contact the DOA Performance Development Team.

NEOGOV OVERVIEW

Navigating the Dashboard

Upon logging into *NEOGOV*, you arrive at your **Dashboard.** The dashboard is a central location from which all tasks can be completed.
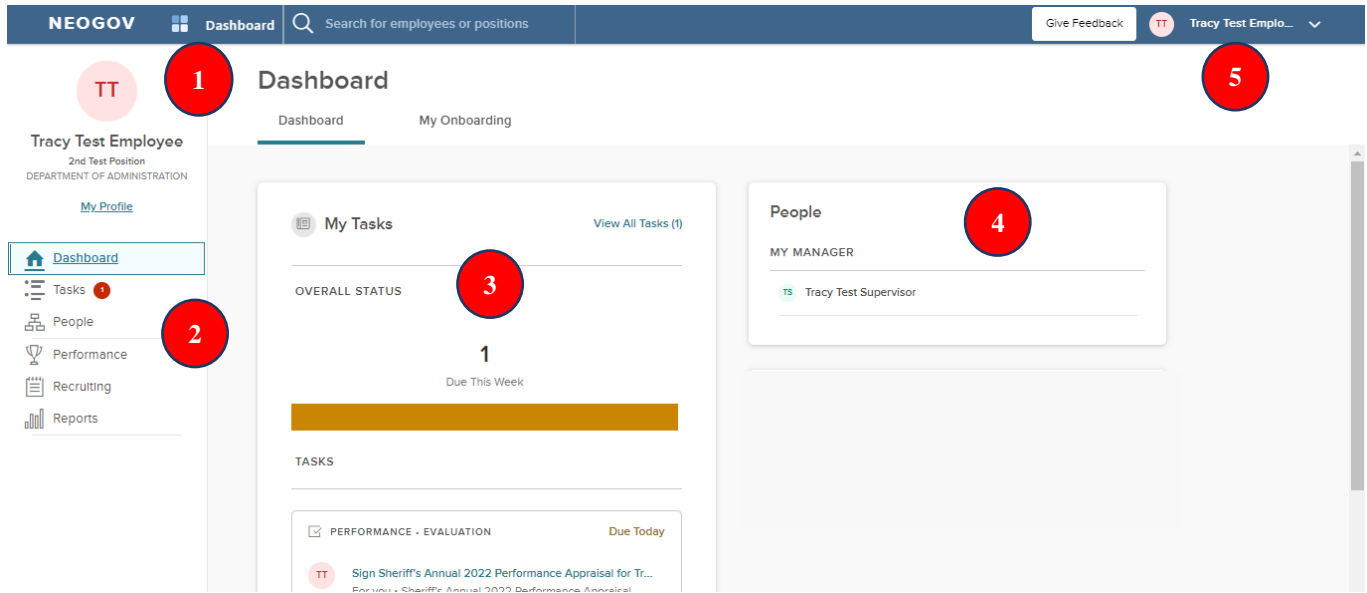
1. **Dashboard Icon** – clicking here will return you to the dashboard from whichever screen you are on
2. **Dashboard Menu:** You may or may not see the following options depending on which NEOGOV modules you have access to:
   a. **Dashboard –** returns you to your dashboard
   b. **Tasks –** will bring you to a page with a filterable list of all your tasks
   c. **People –** a page that displays an org. chart of your reporting structure
   d. **Performance –** a page with helpful links related to your (past and current) performance review
   e. **Recruiting –** this menu item will only appear if you have "Hiring Manager" or higher access in NEOGOV
   f. **Reports –** various reports display depending on your access level in NEOGOV
3. **"My Tasks":** Contains all tasks requiring your action
   a. Color-coded boxes located within this section can be used to filter the various task types
4. **"People**" – indicates your supervisor and anybody who reports directly to you
5. **Your Name:** Access your NEOGOV profile, update your password, and sign out

My Tasks Menu

Any tasks that require your action appear in "**My Tasks"**; on this page, the tasks are not limited to performance, but depending on your role, such as if you are a designated "Hiring Manger" in NEOGOV, all tasks will be listed on this page. You can filter by "Product" to narrow the results, or you can use the "Performance" (left) menu instead to access performance specific tasks.

People Menu

This page will display all your direct reports- if you have any, and your supervisor's name. You can click the name of the employee to be redirected to his/her *Talent Profile* page. Additionally, if the employee has any overdue tasks, you can click into the light red highlighted "Overdue Tasks" in his/her talent box and the list of overdue tasks will display. If there is a discrepancy in your reporting structure, please contact the Performance Development Unit in HR at DOA.performancedev@hr.ri.gov

Performance Menu

By selecting the "Performance" menu on the left, you will be brought to all activities related to your performance review.

1. Any current tasks that require your action appear in "**My Tasks**". To **complete a task**, select the task link to be re-directed to the task.
2. "**My Current Evaluation**" – a link to your full evaluation with a status bar that displays where it is in the process.

Switching to the "My Evaluations" tab while in the "Performance" menu will also provide a link to your detailed current performance review. Note that there is a drop-down menu that allows you to view any past performance evaluations you have done in NEOGOV. Once you complete this current cycle, this performance evaluation will be viewable when you select "completed" in the drop-down menu.