NEOGOV PERFORM: SHERIFFS & CAPITOL POLICE SUPERVISOR USER GUIDE

Division of Human Resources
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RI Dept of Public Safety

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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 Evaluation

The Rhode Island Division of Sheriffs and Capitol Police evaluation process is an annual cycle. The evaluation is a periodic appraisal of the employee's performance by his/her supervisor. It's an opportunity to assess progress, praise his/her accomplishments, and collaborate on goals to improve performance and help achieve the division's objectives.

The Process

Performance Review Process
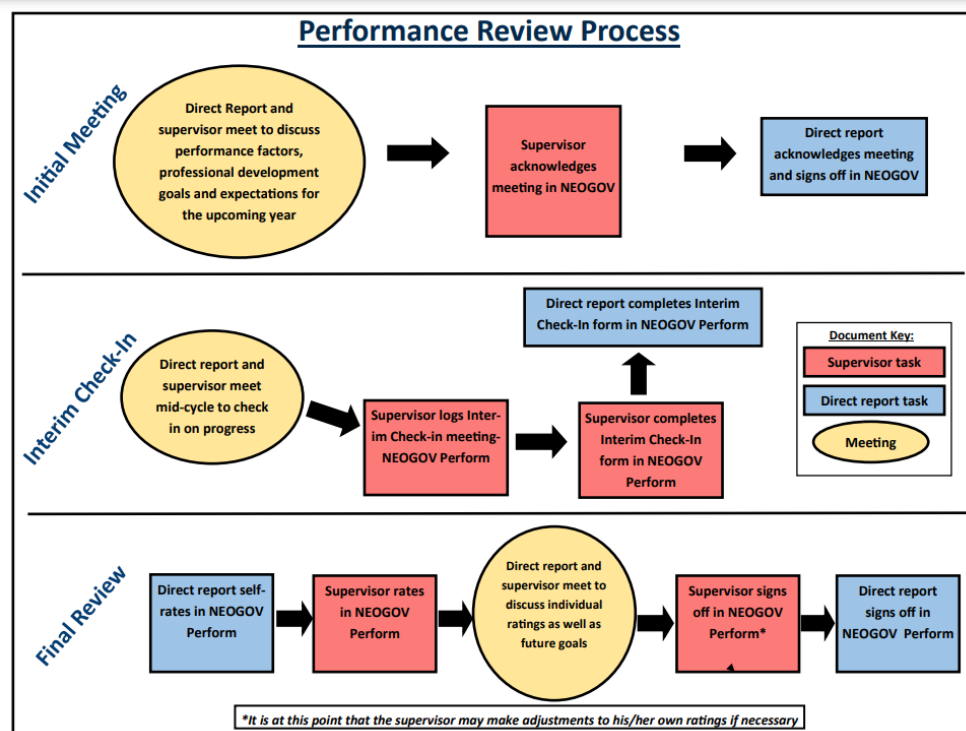
The first *required* step for you, the supervisor, is at the very beginning of the cycle- when you will meet with your direct report(s). You will receive an email notification of when it is time for you to do so.

- At this meeting, you will discuss the evaluation criteria you will be rating him/her on at the end of the cycle (expectations), and a discussion about the employee's career goals and what steps s/he can start taking, in terms of annual goals and professional development to get there.
- Once you have met, you will need to (1) acknowledge the meeting in NeoGov. (Your direct report will do the same) and then (2) enter any content related to goals, professional development, extra duty, etc.
- The second step for you is the "interim check-in" meeting and report. During this meeting, you and your direct report will discuss progress related to performance factors and other professional development activities.
- The final required step is the end-of-cycle review which includes a meeting to discuss your ratings, the direct report's self-ratings and professional development accomplishments.
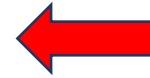
GETTING STARTED – LOGIN

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 created 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.
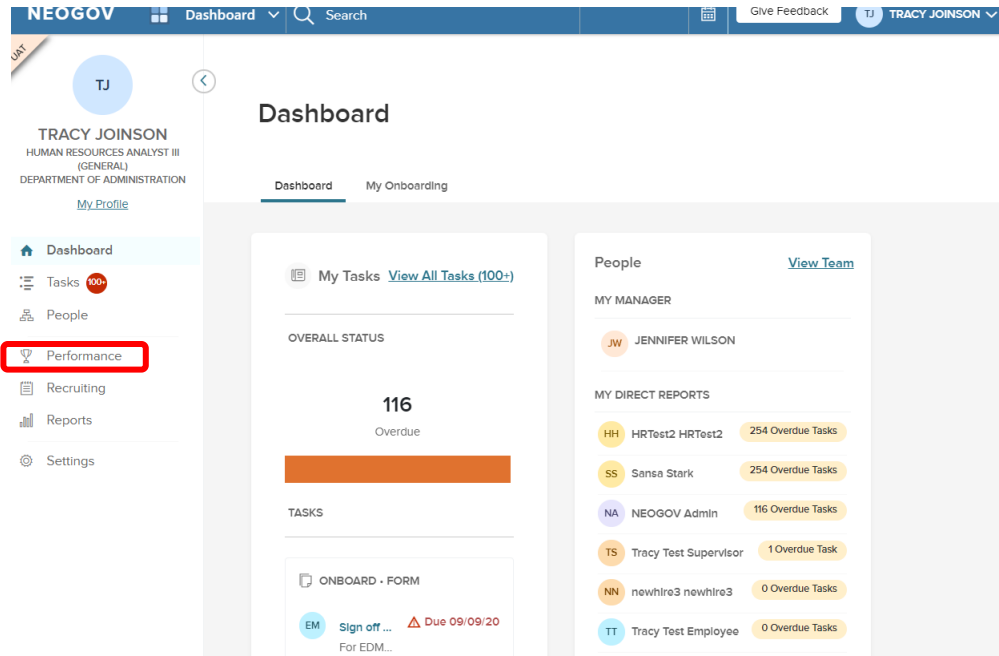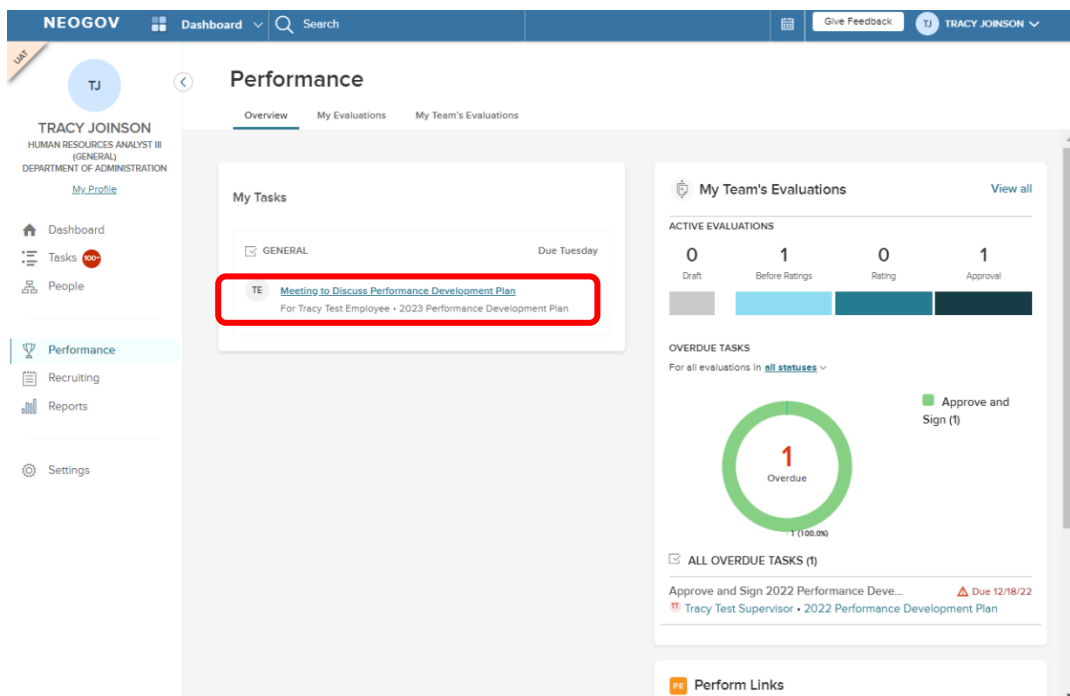
2
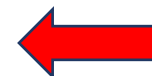
Acknowledging the Initial Meeting and Adding Content
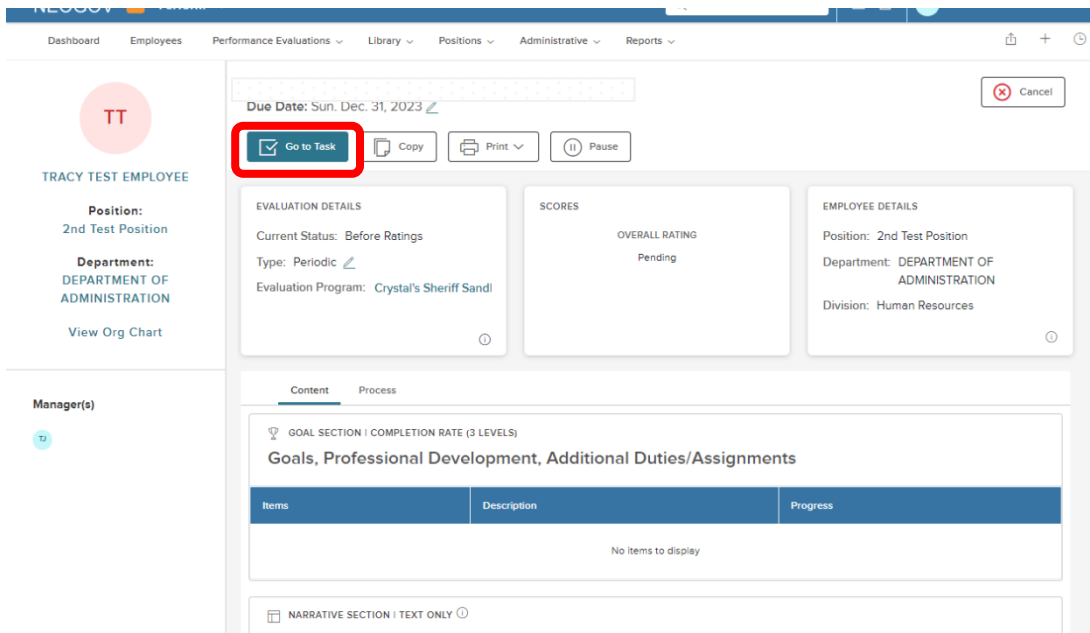
Acknowledging the Initial Meeting
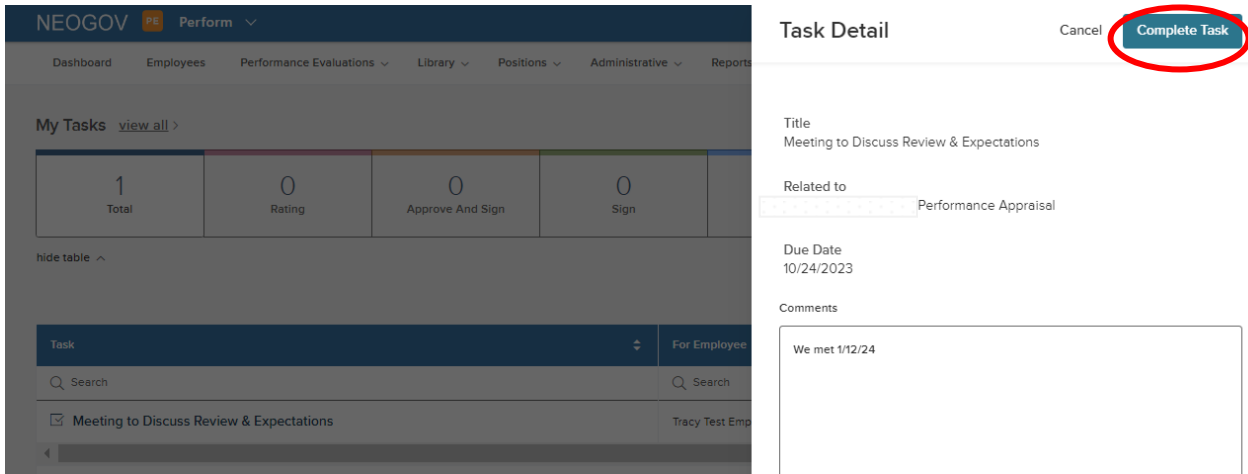
1. Once logged-in click on "Performance" in the side menu:

2. From the "**My Tasks**" section of your dashboard click on **"Meeting to Discuss Review & Expectations"**:

2.   On the next screen, click on "Go to Task":

3.   A fly-out will appear; enter any comments you would like to note and then click, "**Complete Task**":

Once this is done, the task is removed from the "**Current"** task section of your dashboard and immediately replaced with the "Add Goals" task.
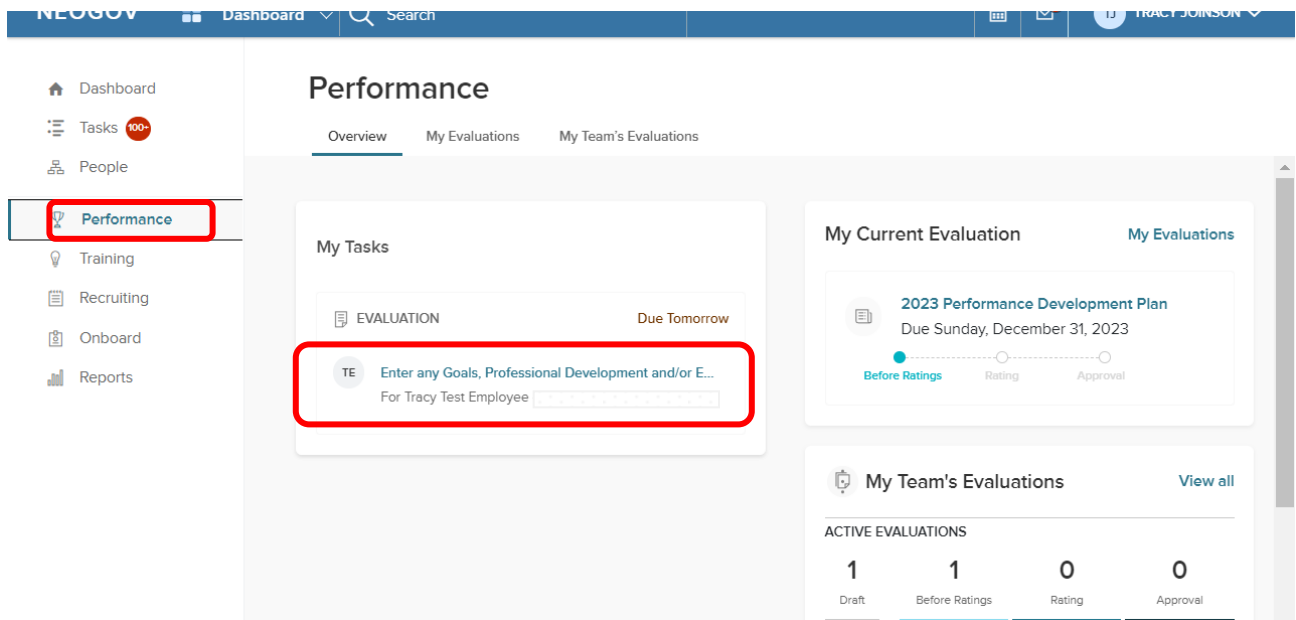
Entering Content - Goals, Professional Development, Additional Duty/Assignments

1.   There are two possibilities for entering the content, if you are doing so immediately after acknowledging the meeting, you will see the "Add Content" box from within the employee's performance review:
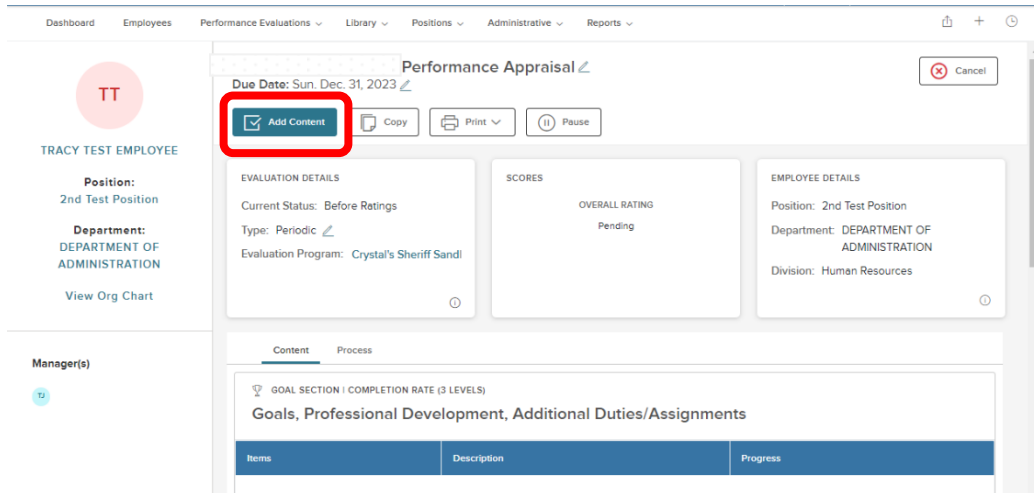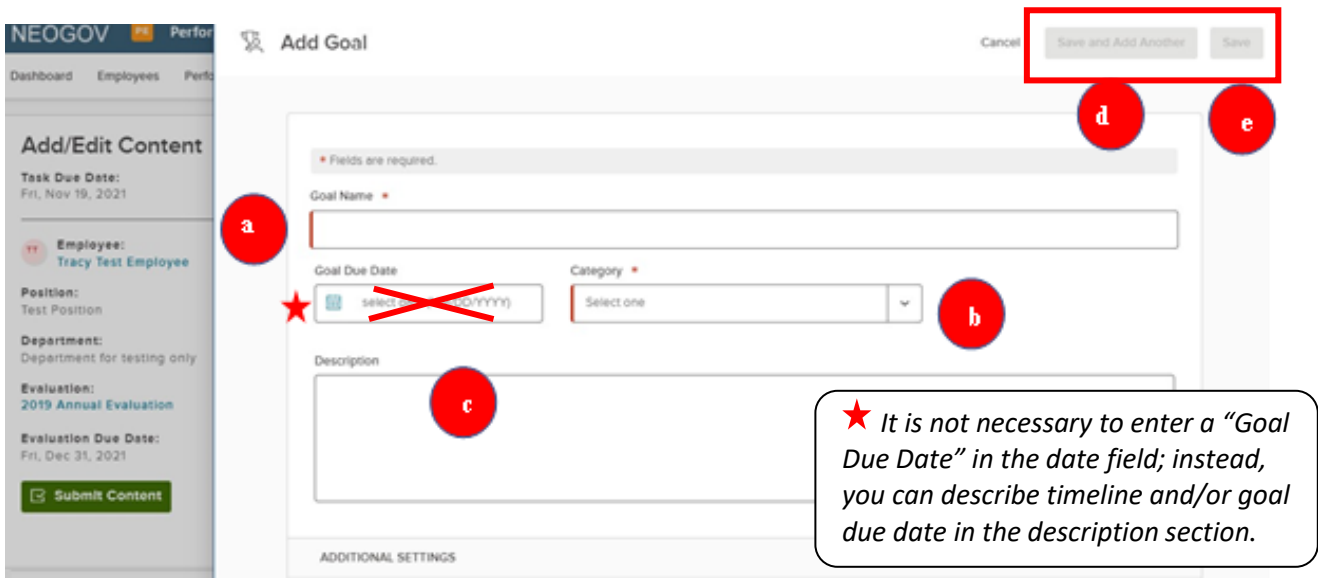

Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task ("Enter any Goals...") on your "Performance" dashboard in the "My Tasks" box. Select the task on your dashboard:

2.   To add content to "Goals, Professional Development, Additional Duties/Assignments" that you discussed with your direct report, click "+Add Goals", then "New Goal".
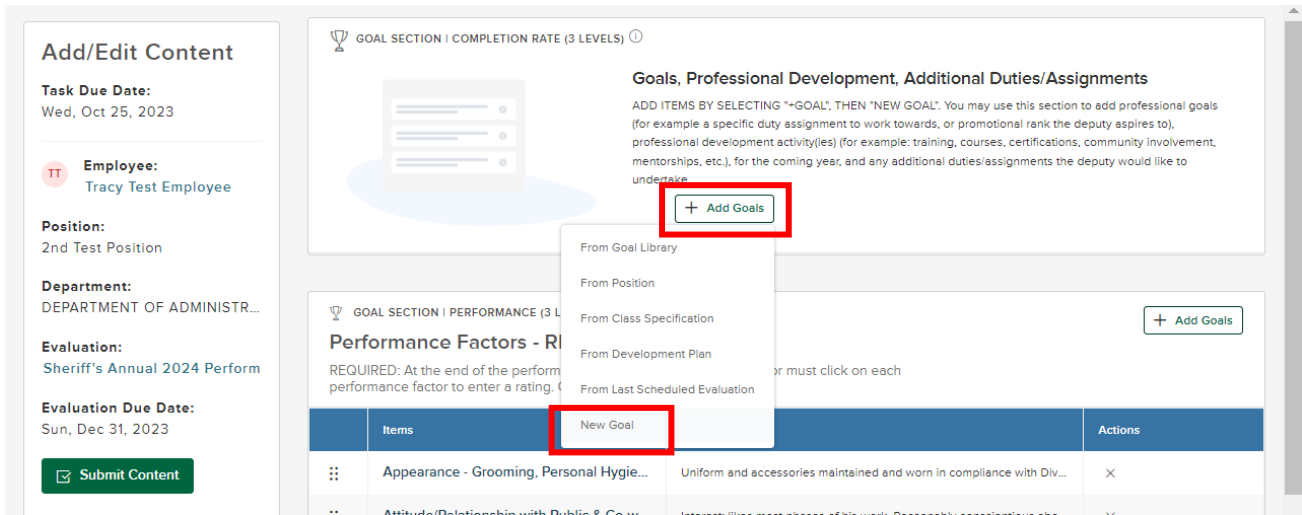
a) Enter the **Goal or professional development or extra duty assignment title.**
b) Select the goal category.
c) Enter in a **Description** (optional, although this is a good place to document the details).
d) To enter an additional goal, select "**Save and Add Another**" until you have created the last goal.
e) Upon creating the last goal, instead select "**Save**".

★ *It is not necessary to enter a "Goal Due Date" in the date field; instead, you can describe timeline and/or goal due date in the description section.*

3. You will not be making any changes to the "Performance Factors" sections as those have been established by department leadership based upon your department's accreditation needs.

4. Select "Submit Content". A confirmation message will appear; select the appropriate option.

Once completed, please alert your direct report that you have completed entering content and s/he now needs to sign-in to NeoGov to acknowledge the content by signing-off.

QUICK GUIDE - *COMPLETING AN INTERIM CHECK-IN FOR YOUR DIRECT REPORTS*

About halfway through your direct report's performance review cycle, you will receive an email notification that it is time to contact him/her to schedule a check-in meeting to discuss the progress made toward accomplishing goals. Once you have met to discuss the status, you will need to **(1)** acknowledge the **meeting** in NEOGOV and then **(2)** complete the check-in form.
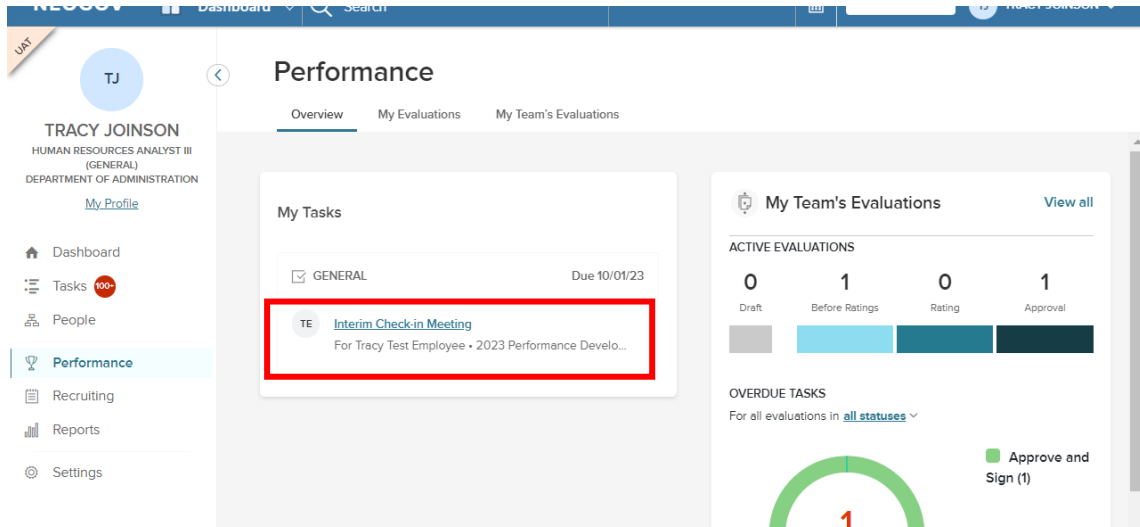
TIP

If you need to make changes/edits to your direct report's performance review after having your interim check-in meeting, refer to the final "Quick Guide" (page 22) within this guide, "Editing a Review"
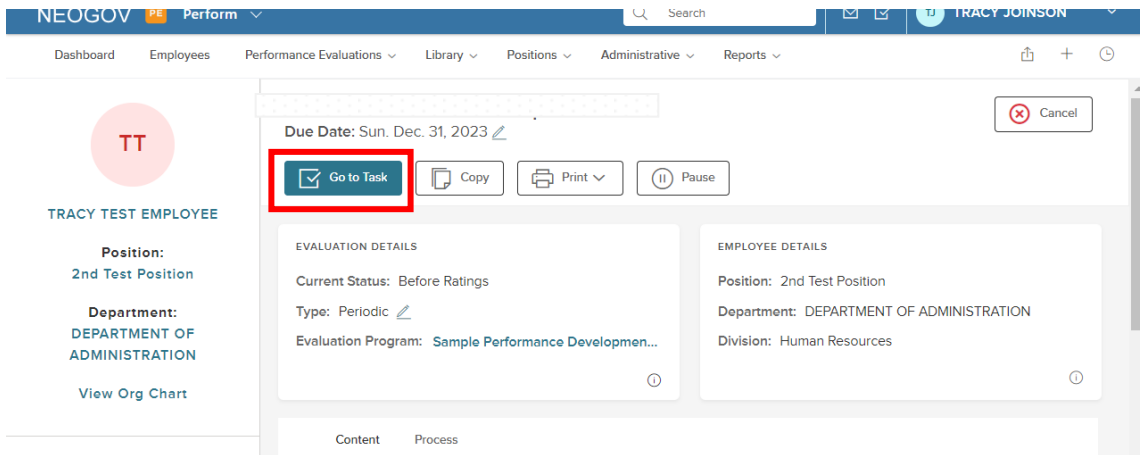
1. Once you have met, to mark the meeting task as completed, log-in to NeoGov and select "**Performance"** on the left menu:
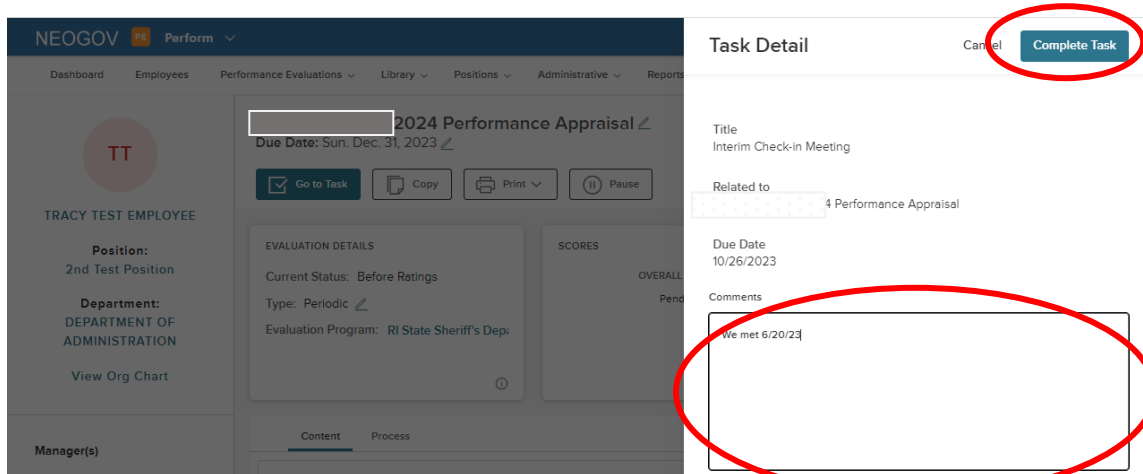
2. Then "Meet with Employee to Discuss Interim Check-in" from the "My Tasks" section:

3. On the next screen (within the employee's performance review), select "Go to Task":

4. A fly-out will appear. Add any comments as needed and select "Complete Task".

5. This task will be immediately replaced by the second step in the process, completing the interim check-in **form**. This is a two-step process for you- the supervisor.

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TIP

Although the check-in form will ask you to comment on the status of each content area (performance factors, goals, etc.), it will not display the specific content, so have a copy of the performance review on hand to refer to (print or electronic). To print a copy, from the "Performance" dashboard, select "My Team's Evaluations", scroll to the employee's performance review under "All Evaluations". Once you select it, you will see a *print icon at the top of the plan. Return to your "Performance" dashboard to select the interim check-in task once printed.

*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.

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4.   After this meeting, you must complete the "Interim Check-In Review Form". There are two possibilities for entering the content, if you are doing so immediately after acknowledging the meeting, you will see the "Check-In" box from within the employee's performance review:
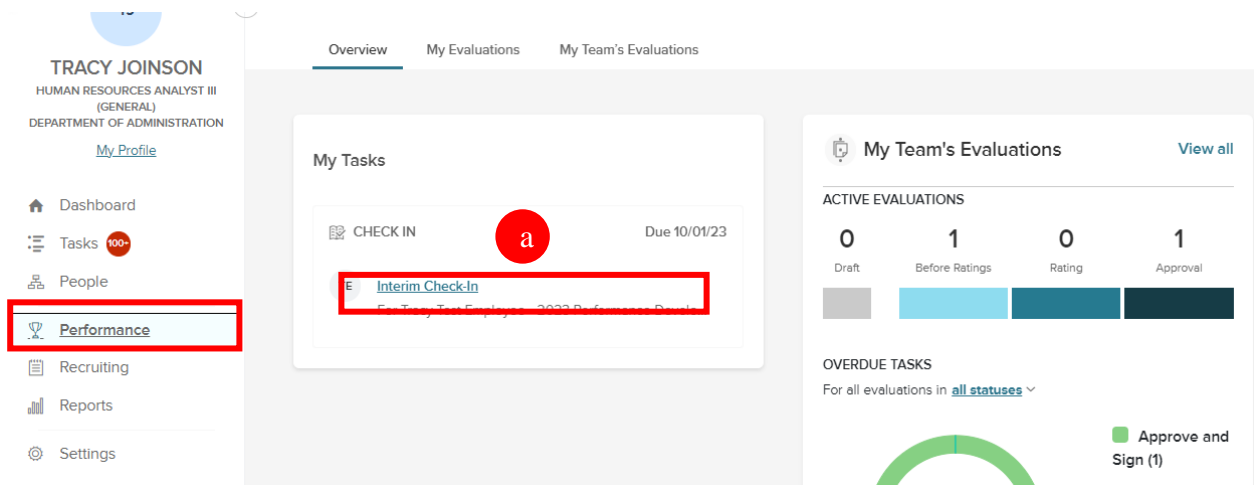

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TIP

If, after meeting with your direct report, you have determined that his/her goals need editing, see the "Editing a Performance Review" section of this guide.

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Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task ("**Interim Check-In")** on your "**Performance**" dashboard.

a)   Select "**Interim Check-In"** from "**My Tasks**":

a)   A fly-out appears with the **Check-In** questions *(refer to the "TIP" above regarding viewing the specific content for each area- goals, success factors, professional development).*

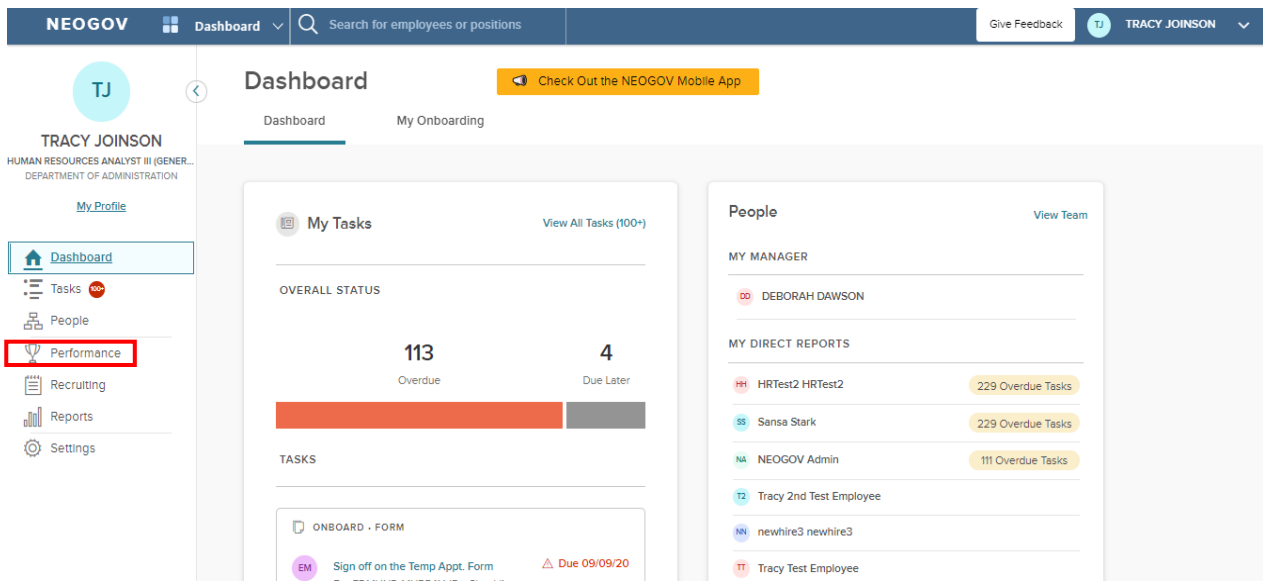b)   Once you have addressed all content areas, select "**Publish"** in the upper right corner.
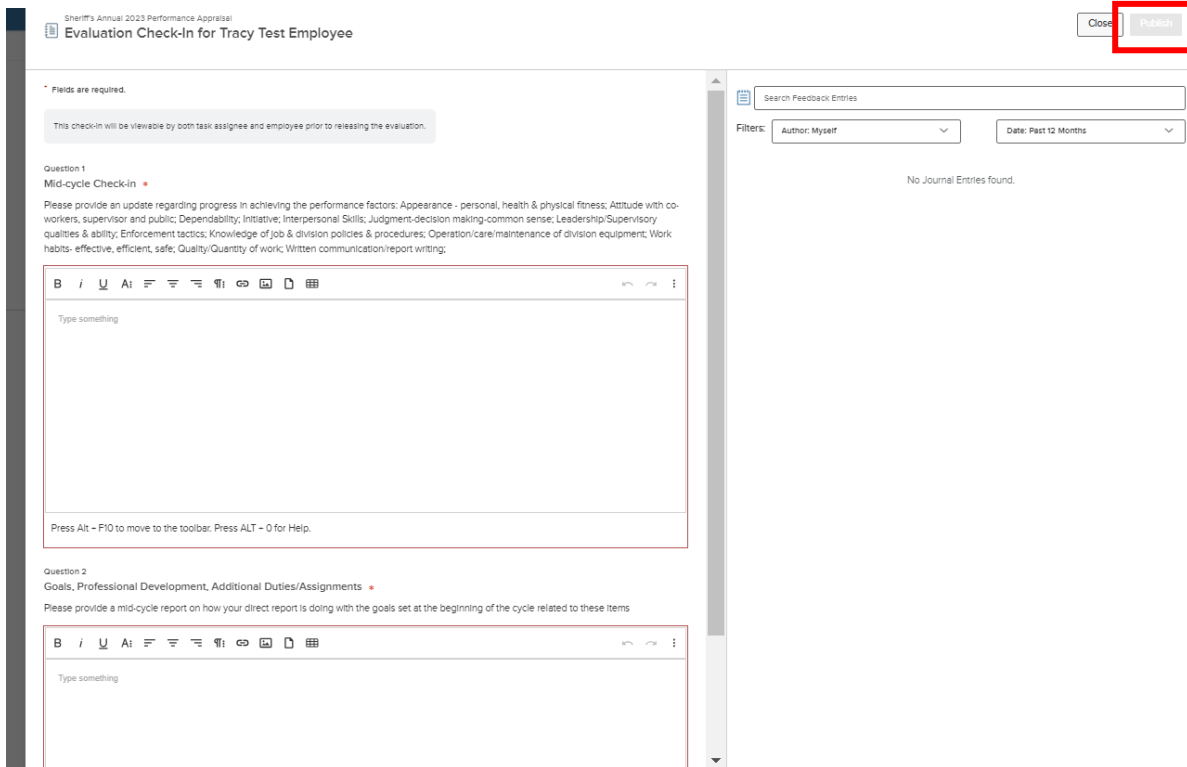
You should now alert your direct report(s) that you have completed the interim check-in form so s/he now needs to do the same.
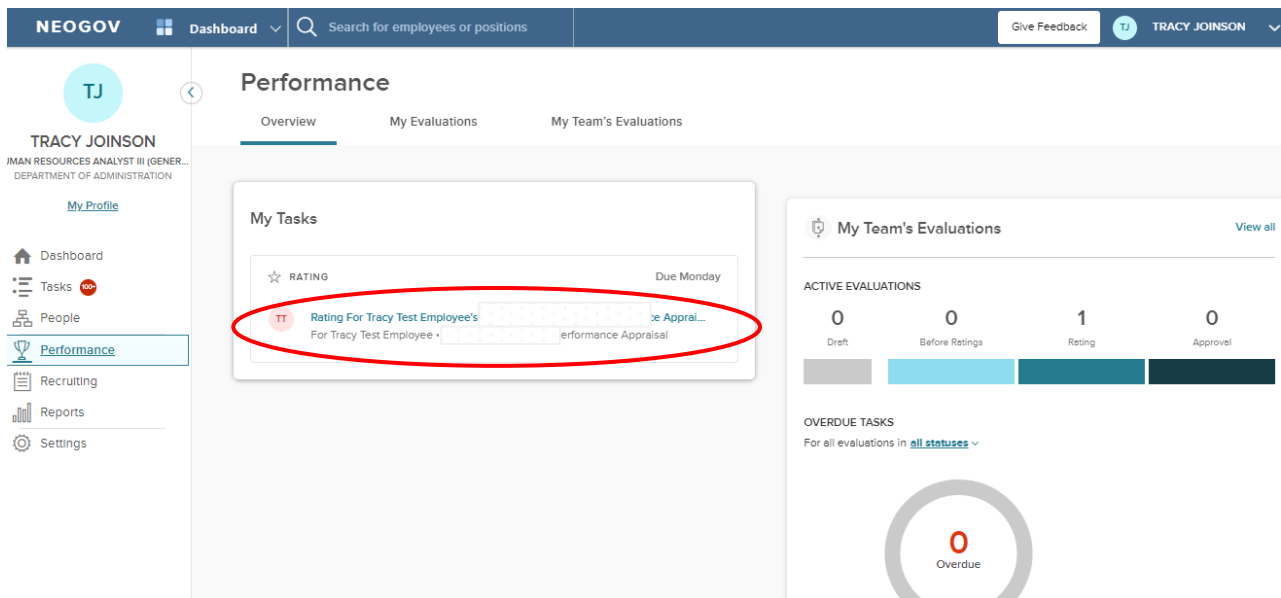
QUICK GUIDE – END OF YEAR FINAL REVIEW

At the end of the performance review cycle, the final review process begins. The first step is the **employee self-rating**. Once this step is completed by your direct report(s), you will receive notification from NEOGOV that s/he has done so and it is time for you to complete your final review.

1. Upon notification, navigate to your NEOGOV dashboard and select "Performance" from the left menu.

2. On the Performance page, you will see all tasks related to performance evaluations, select the rating task for your direct report(s):

3. The link redirects to the rating form.
    a. To leave the rating form and return to the "evaluation detail" page, select "**Go to Evaluation Details**"
    b. To **view the contents of the various sections, click the specific section name to the left.** Note that required rating areas have an alert symbol. If you entered goals/professional development/extra duty information for the employee, these should also now be rated.
    c. To view the criteria for each of the three levels of the rating scale for each **Performance Factor**, in the "Notes & Attachments" section, download the "Performance Factors – Ratings Defined" document:
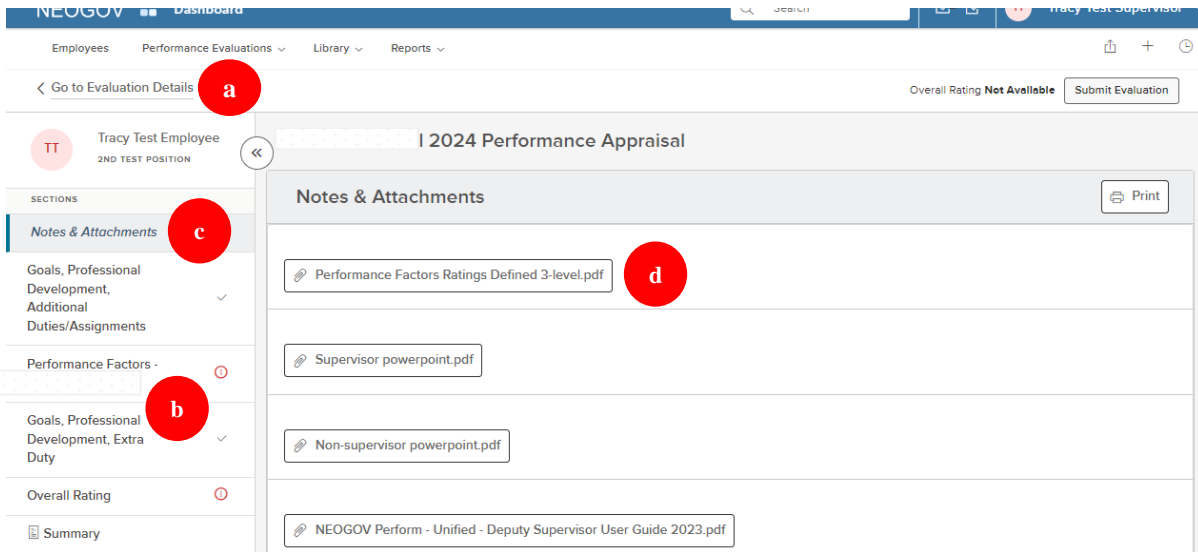

4. To rate an item, (1) select the section name and then (2) an item *within* a section:
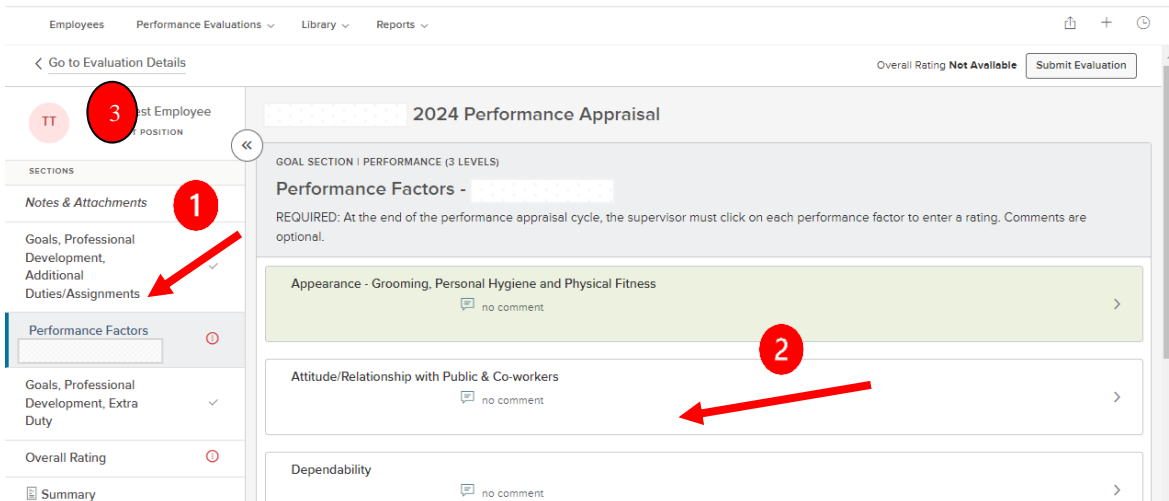

5. Notice the red alert symbols ⚠ indicating that the section must be completed before moving forward with the process. Again, if you entered goals/professional development/extra duty information for the direct report, these should also now be rated.
6. To leave the rating area and return to the evaluation detail page, select (3) **"Go to evaluation details"**

7. Upon selecting the item name to be rated, the rating card fly-out appears:
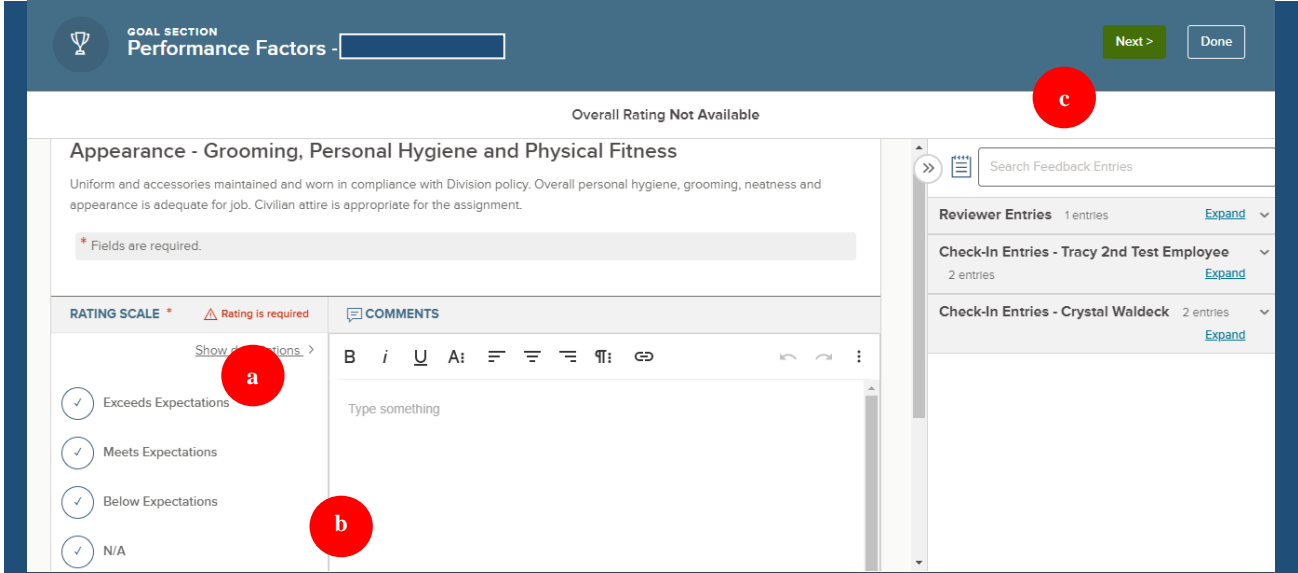

1. The "**Feedback Entries**" appear on the right side of the rating card. If available, you see **Check-In Entries** (from the interim check-in), and "**Reviewer Entries**" (your direct report's self-rating).
2. You see a **Rating Scale;** to view a description of each rating value, select the "**Show descriptions**" link and an informational flyout appears. Again, for a more in-depth explanation of each rating *as it applies to the specific performance factor*, you can review the "Performance Factors – Ratings Defined" document in the "**Notes & Attachments**" section. If the comment box is outlined in red, comments are required.
3. Select your rating and type any text into the **Comments** box as desired. If a comment is required, the box is highlighted in red. While rating, the system auto saves all progress made. If needed, you may exit out of the rating card and resume rating at a later time.
4. To move to the next rating item, click "**Next**" in the top right corner.

6. Select "**To Overall**" to move to the next required section, or if you need to review an earlier rating, select "**Prev**"
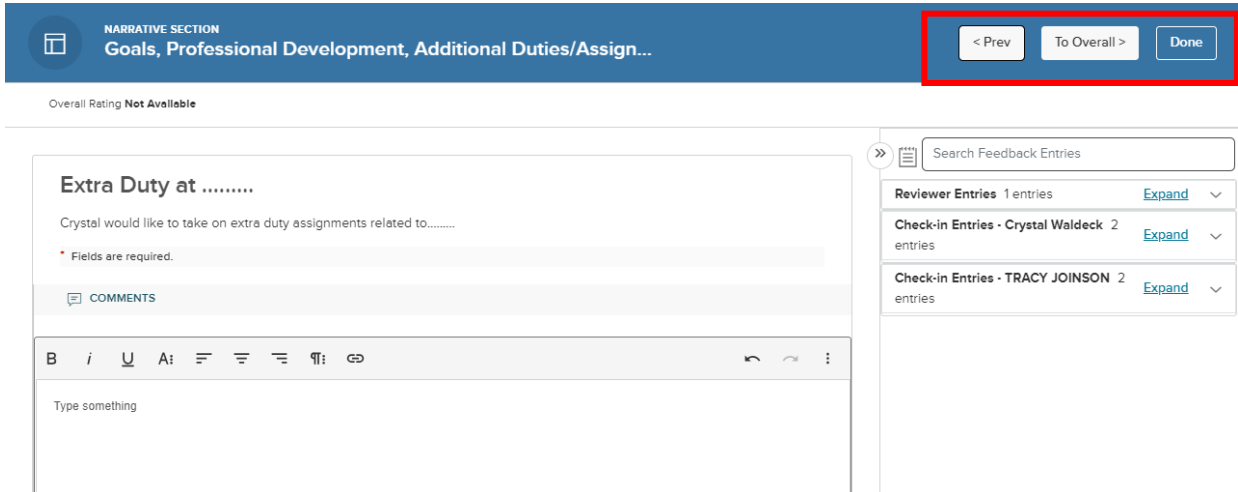
7. The final rating is your *overall* rating of the employee's performance over the past year. Select your rating and enter any comments if desired; if comments are required, the comment box will be outlined in red. Select "Done" when finished.

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

9. To print the current state of the review for the meeting with your direct report to go over your ratings, select the "**Summary**" section on the "evaluation detail" page, and then select "**Print Current State**".

10. After submitting, you will get a confirmation message. Once the review is submitted changes can no longer be made at this point without the assistance of HR. **If further changes are needed, click "Cancel"**. Otherwise, select "**Continue**".
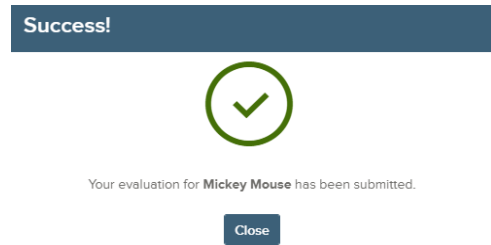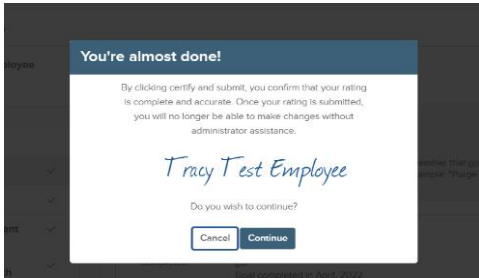
DO NOT UTILIZE THE "Go to Task" immediately after completing your rating as you have not held the meeting yet- which is the next task/step in the process.

Once you have completed the final rating, you must meet with your direct report to:

    a) Discuss the results of the annual review just completed.

    b) Discuss the level of future performance expected, the rating criteria, and/or goals for the next review period.

    c) Provided career counseling relative to potential advancement, specialized assignments, and training needs.

QUICK GUIDE – *Final Meeting and Sign-off – Your Final Step*

Once you hold the meeting with the employee, it is time for you to acknowledge the final review meeting and sign-off on the final version. **This is also the time when you make changes to your ratings.**

1. Select "Performance" from the left menu of your dashboard. Click the **Meeting** task from the task list.
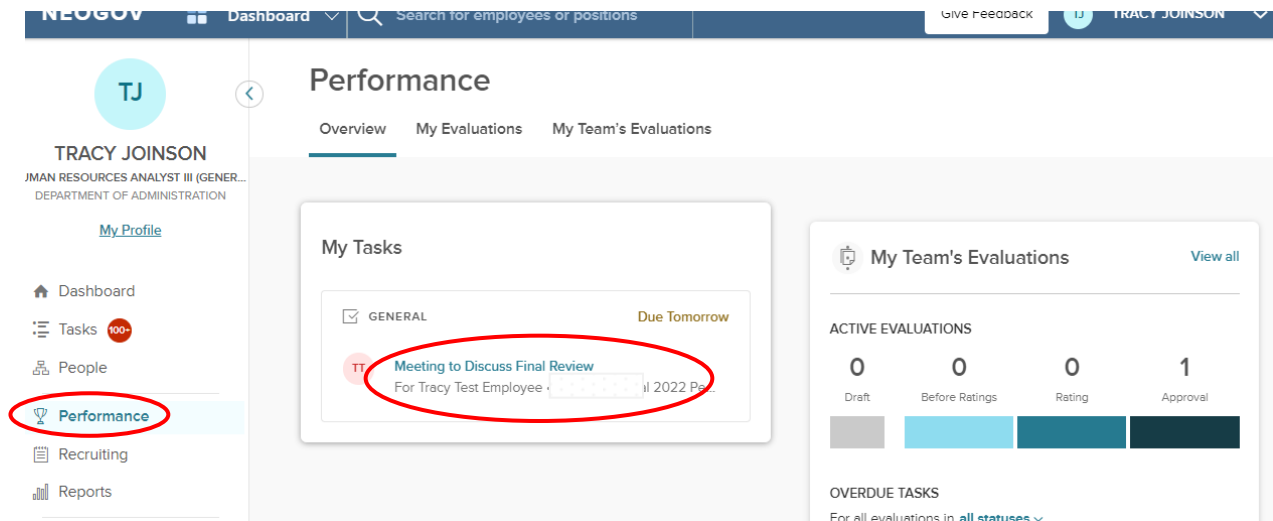
2. By selecting "Complete Task", you are affirming that you met with the employee being reviewed and that you have: 1. discussed the results of the annual employee review just completed, 2. discussed the level of future performance expected, the rating criteria, and/or goals for the next review period; and 3. you have provided career counseling relative to potential advancement, specialized assignments, and training needs.
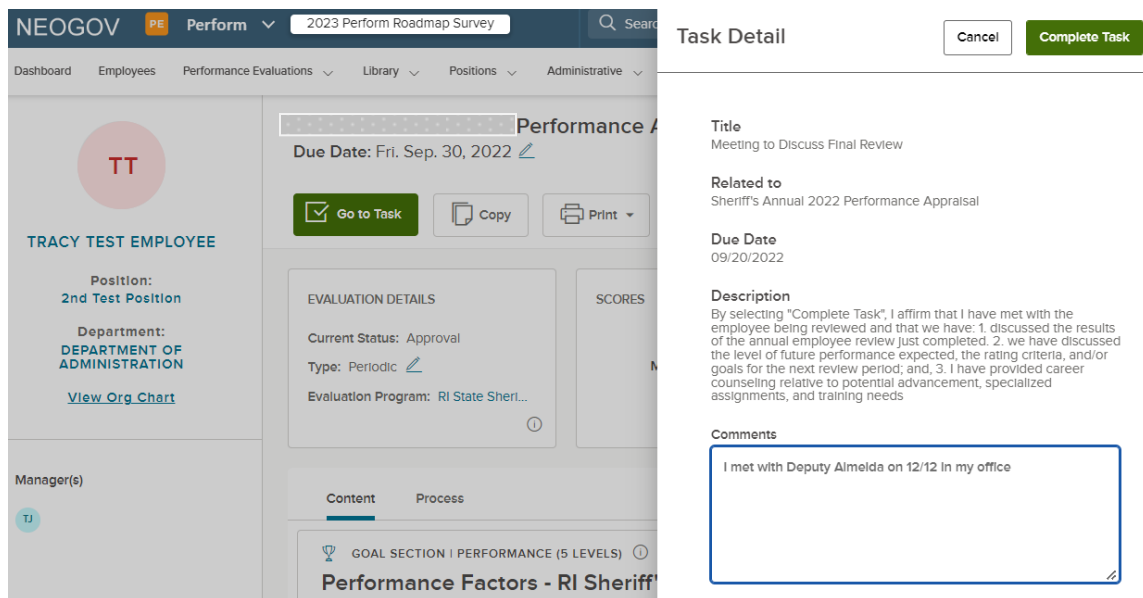
3. This is *immediately* followed by your final signature task.

TIP!
To make changes to the performance review, select "**Deny**" in the top right corner of the approval screen to re-open the rating task. Once it is resubmitted, all approvals and signatures are re-triggered

4. The approval/signature page displays with the full performance review details:

a) **"Rating Summary"**: displays all raters (you and your direct report)
b) You can navigate through the various **Sections** by clicking on the specific section name.
c) **To make changes, select "Deny" to re-open the rating task.** *Once denied you may make changes to your ratings. Once re-submitted, all subsequent steps, are re-triggered.* Otherwise, select "**Approve & Sign".**

Once you select the **sign** button, a fly-out appears.

4. Enter in any comments, sign and submit. The system will create an electronic signature for you, but if you'd prefer to create your own signature with your mouse, click "Draw Signature" underneath the signature line.

Congratulations! You have now completed *your* very last step in the current cycle and the performance review will be archived in the NEOGOV system.

It is now time for your direct report to 1) also acknowledge the final meeting, and 2) to sign-off to acknowledge awareness that your ratings are available for viewing. S/he may elect to also enter comments and may request further review if s/he does not agree with the final ratings. If this latter option is chosen by the employee, s/he is instructed to contact you via email. S/he will receive an email notification that these steps are due, however it may be more timely for you to alert him/her that you have completed your steps and it time for him/her to now due the same.

Once your direct report signs to acknowledge the meeting and your ratings, you will receive an email notification that the process is complete.

You may review it at any time in the future by going into the employee's profile under the "People"/"My Direct Reports" section of your *NEOGOV* dashboard:

1. Select the employee from your list:

2. Click on "Performance" in the employee's top menu:

3. You will need to change the drop-down menu from "Active" to "Completed".
4. Select the performance appraisal link to view the full contents.

QUICK GUIDE - EDITING A PERFORANCE DEVELOPMENT PLAN

Occasionally, an employee's goals, extra duty, and/or professional development activities will need to be changed during the performance review cycle (i.e., employee transfers into your unit, new assignment, reorganization, etc.). In this case, you will need to edit the review form to reflect the employee's new responsibilities or the department's new priorities.

1. To do so, navigate to your *Performance* dashboard and click on the employee's *current* performance development plan under "**My Team's Evaluations**".

2. To edit the review, you will need to put it into a "draft" status. To do so, click "Pause".

3. Click "Continue" on the pop-up screen:

IMPORTANT – You may *not* remove any of the "performance factors" from the list; you may only edit/change/delete the goals, professional development and additional duties/assignments content.

1. To add new content, follow the original "Adding" process ("+Goal", then "New Goal"). To edit *existing* goals/extra duty, click on the pencil icon to the right of the content, edit the content, and click "Save".
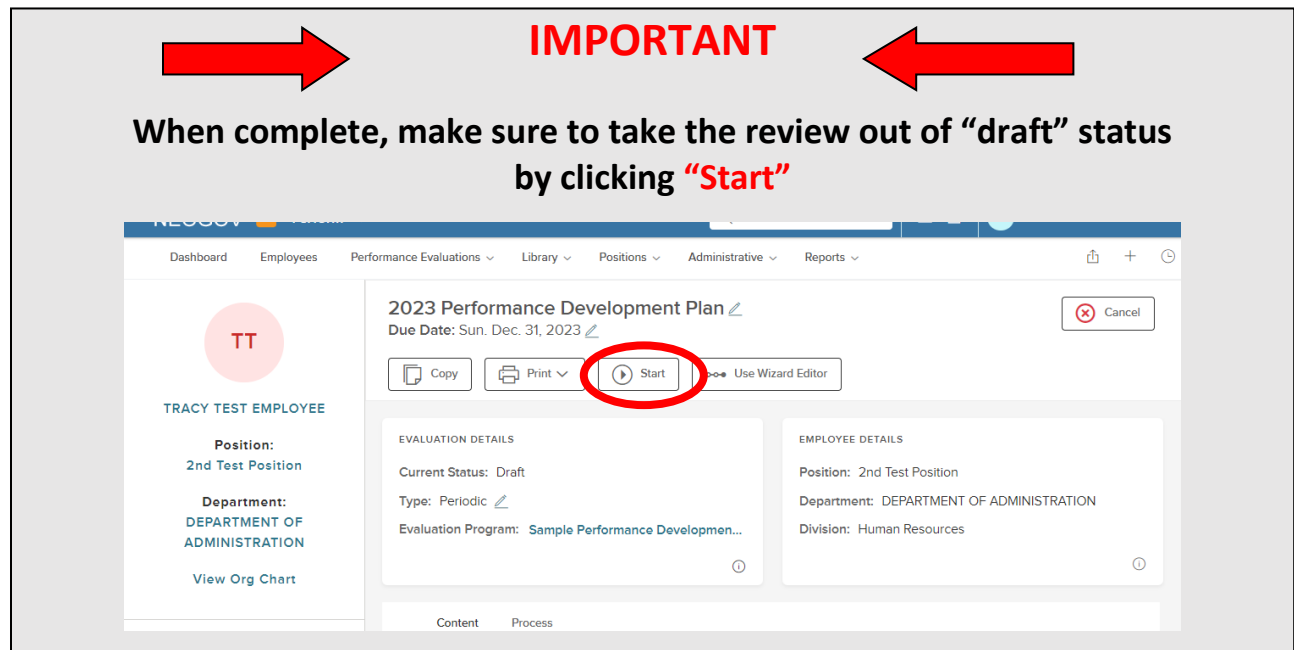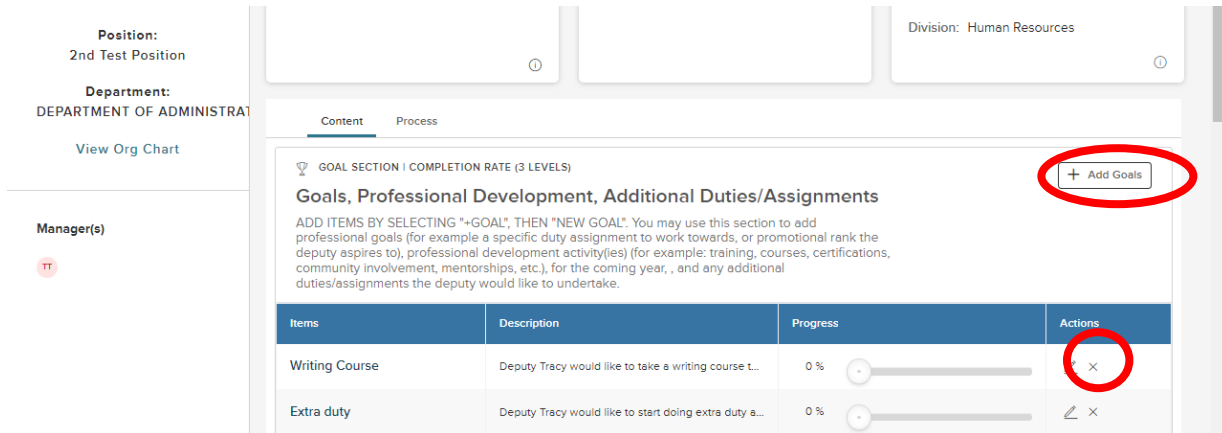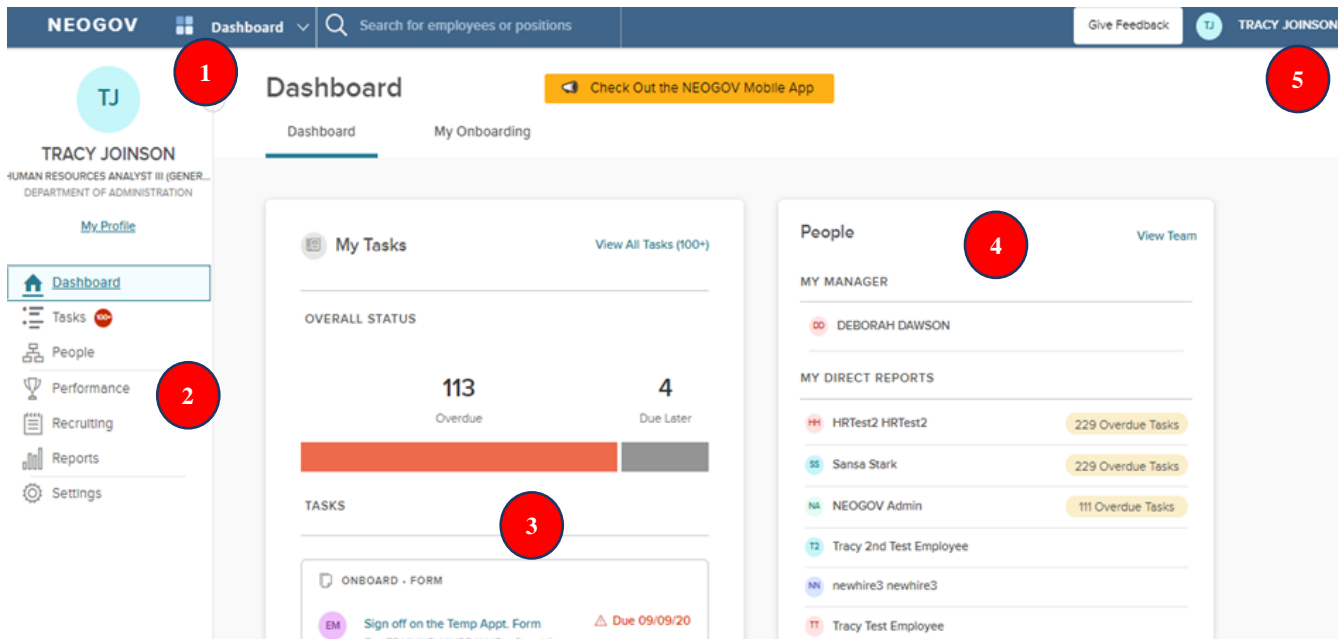

Click "Continue" on the pop-up screen:
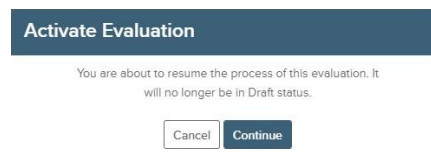
NEOGOV OVERVIEW

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 in the system.

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 you're an org. chart of your reporting structure
   d. **Performance –** a page with helpful links related to performance reviews
   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 all of your direct reports and your supervisor
5. **Your Name:** Access your NEOGOV profile, update your password, and sign out

My Tasks

Any tasks that require your action appear in "**My Tasks**"; on this page, the tasks are not limited to performance evaluations, 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.

People Menu

This page will display all your direct reports. 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 direct reports list, 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 performance evaluations.

1. Any tasks related to performance evaluations that require your action appear in "**My Tasks**". To **complete a task**, select the task link to be re-directed to the task.
2. The **"My Team's Evaluations"** box provides a status grouping of all of your tasks, including any overdue tasks. You can select each colored status box and the overdue indicator to be brought to those tasks specifically.

3. **My Evaluation** – a link to your own current evaluation (if any) with a status bar that displays where it is in the process. You can change the status drop-down box to "completed" to view any of your own past evaluations (if any).
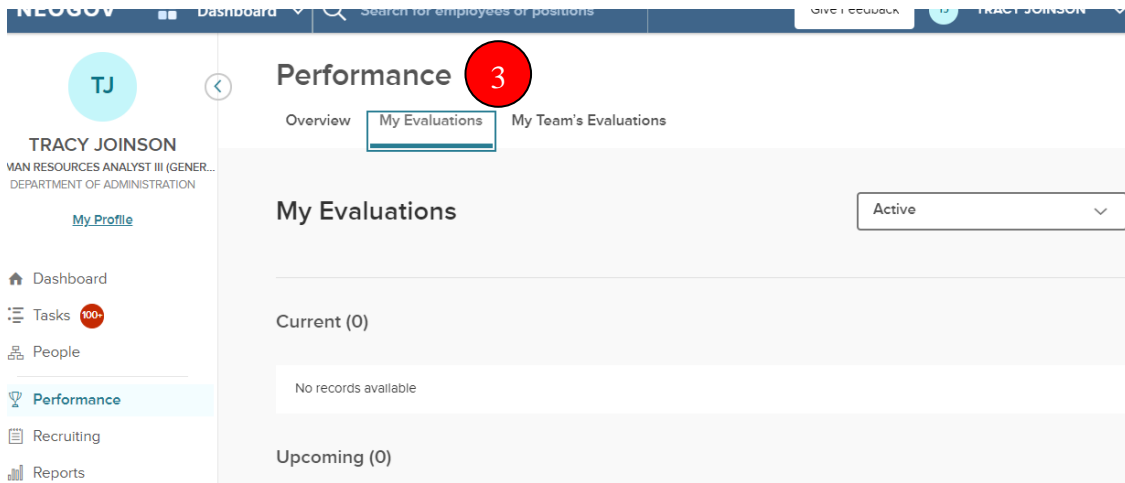
4. "**My Team's Evaluations**" displays all active evaluations for your direct reports with a clickable link to each as well as a color-coded category box for each task status type.
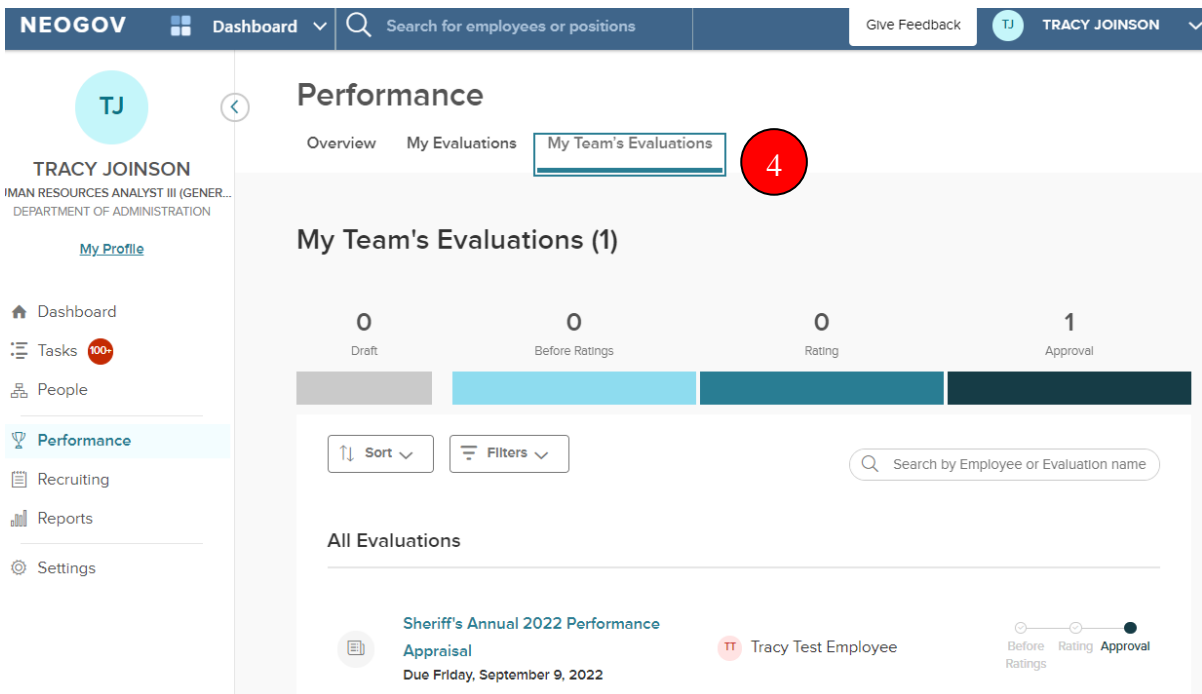
TIP!
To filter the list of tasks, click on any of the color-coded boxes. For example, if "Ratings" is selected, all rating tasks display in the list