

NEOGOV PERFORM:

NON-SUPERVISOR USER GUIDE



Division of Human Resources
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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 never 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)

GETTING STARTED – LOGIN

To log into Perform, go to: <https://performance.neogov.com/login>.

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

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



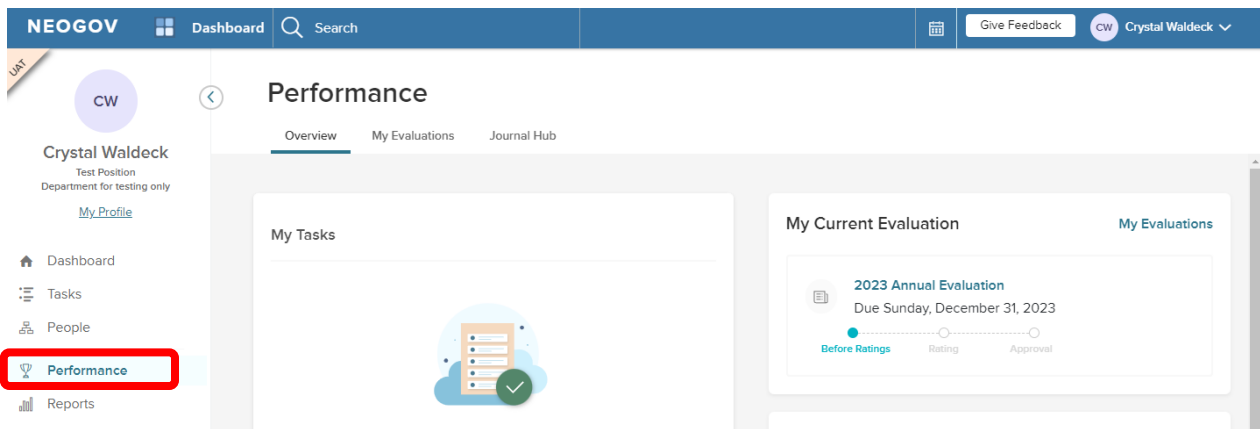
The login form features the NEOGOV logo at the top. Below it are two input fields: 'Username' and 'Password'. A note below the fields states 'All fields are required'. A blue 'Log In' button is positioned at the bottom, with a link 'Forgot your username or password?' underneath it.

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.



The password reset form is titled 'Password Reset'. It contains five input fields: 'Username', 'Email', 'First Name', 'Last Name', and 'What's 3 + 5?'. At the bottom, there are two buttons: 'Cancel' and 'Reset Password'.

Once logged-in navigate to the “Performance” dashboard linked on the left menu.



The dashboard screenshot shows the NEOGOV interface. The top navigation bar includes 'NEOGOV', 'Dashboard', 'Search', 'Give Feedback', and the user profile 'Crystal Waldeck'. The left sidebar menu lists 'Dashboard', 'Tasks', 'People', 'Performance' (highlighted with a red box), and 'Reports'. The main content area is titled 'Performance' and has tabs for 'Overview', 'My Evaluations', and 'Journal Hub'. The 'Overview' tab is active, showing 'My Tasks' and 'My Current Evaluation'. The 'My Current Evaluation' section displays '2023 Annual Evaluation Due Sunday, December 31, 2023' with a progress bar for 'Before Ratings', 'Rating', and 'Approval'.

QUICK GUIDE - ANNUAL GOAL SETTING

Initial Goal Setting Meeting

Your supervisor will reach out to you to schedule an initial meeting to discuss expectations for the annual performance development period. You will meet to decide upon 2-4 of each:

1. **Goals** - Recall from your Performance Development training, the goals should be **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-based. *For example: The first Friday of every month, solicit updates and new material from managers for the web page; publish this new material no later than the following Friday so that consumers have the most up to date information.*
2. **Success Factors**– Choose 2-3 to focus on throughout the cycle from: communication skills, customer service, leadership, supervision, teamwork and cooperation and technical/subject matter knowledge (note that ALL employees have ethics/honesty/integrity included/preset which may not be removed from your list).
3. **Professional development** - opportunities that can help you achieve your peak performance.

Acknowledging Your Goals

After you have met with your supervisor and discussed your goals, professional development, and success factors for the upcoming year, your supervisor will acknowledge the meeting and enter them into your performance development plan. Once this is completed, you will receive a notification from NEOGOV to acknowledge the content.

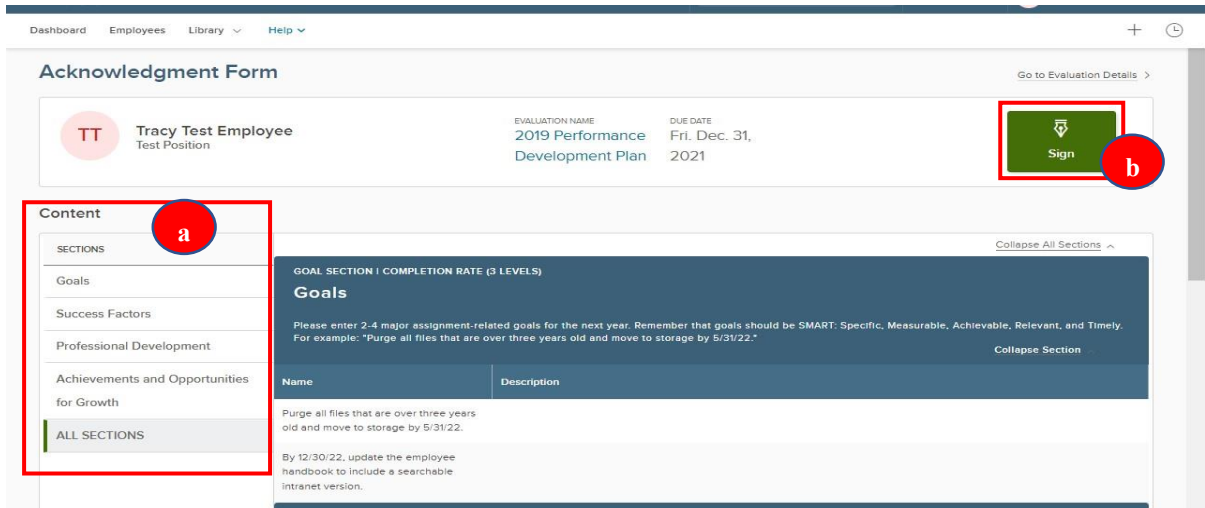
1. Upon logging-in, you will land on your dashboard. To complete this step, go into the “Performance” dashboard on the left menu and then click into the **Sign** task from the “**My Tasks**” section of your dashboard. Alternatively, if you have many tasks, you can select “Performance” on the left menu to narrow your list of tasks to be brought to the task link as well:

The screenshot displays the NEOGOV Performance dashboard for a user named Tracy Test Employee. The dashboard is divided into several sections:

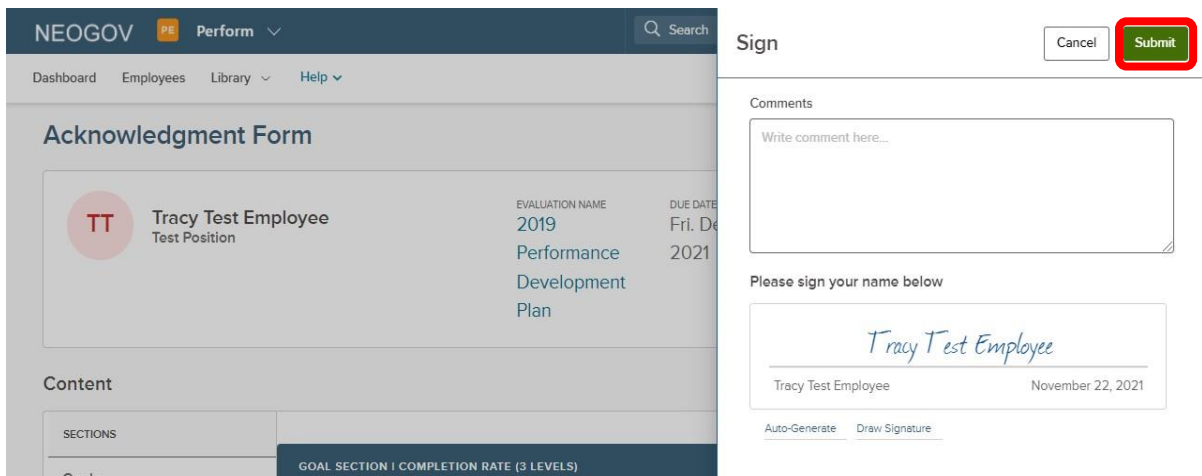
- My Tasks:** A list of tasks with a red box highlighting the task "Sign 2023 Performance Development Plan for Tracy Test Employee" due on 08/05/23.
- My Current Evaluation:** A section showing the "2022 Performance Development Plan" with a due date of Tuesday, December 20, 2022, and a progress bar indicating the current stage (Approval).
- Perform Links:** A list of links including "Goal List", "Success Factor List", and "Development Plan List".

The left sidebar contains navigation options: Dashboard, Tasks, People, Performance (highlighted with a red box), and Reports.

2. You should review the content of the performance development plan before submitting your signature. Click on a (a) **Content Section** to the left to display the items within that section on the right.
3. To sign, click the (b) "Sign" button:



1. A fly-out will appear:
2. Comments may be entered. NEOGOV auto-generates an electronic signature. Select "**Submit**" to acknowledge the goals, success factors, and professional development your supervisor has entered. *NOTE: Any comments entered will appear on the final performance development plan printout.*



TIP!
You can always return to your dashboard by clicking on the **NEOGOV** logo in the top left corner of the screen.

QUICK GUIDE - COMPLETING YOUR INTERIM CHECK-IN

About halfway through the performance development cycle, your supervisor will reach out to you to meet and formally check in to document your progress toward your goals, success factors, and professional development (if your supervisor does not reach out, please initiate the meeting). Once you and your supervisor have had your interim check-in meeting, and your supervisor has completed the check-in steps, you will then do the same. Your supervisor should notify you once s/he has completed the task. The task will not appear on your dashboard until after s/he has done so.

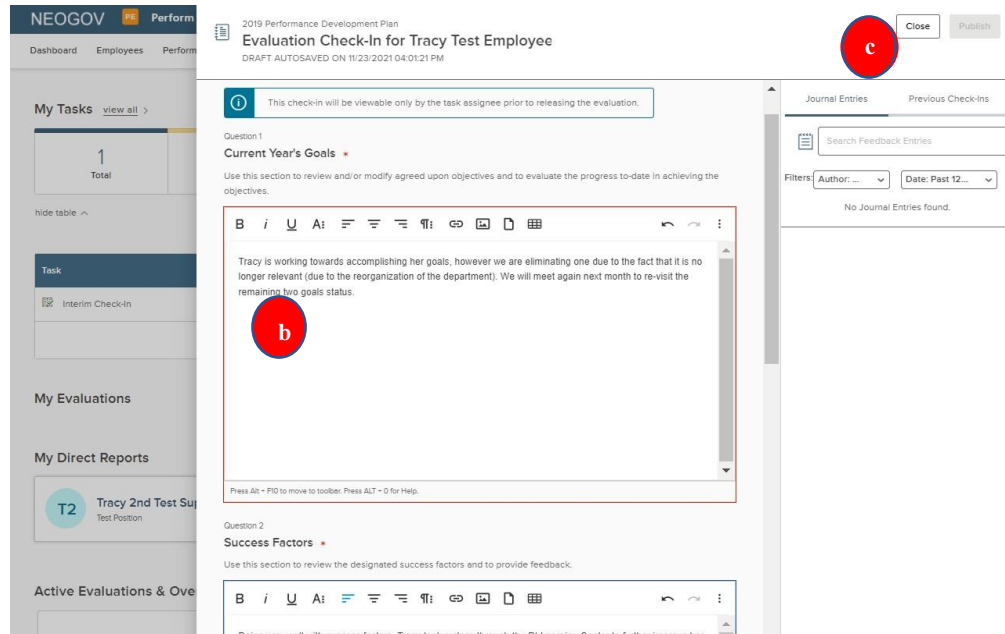
TIP

Although the check-in form will ask you to comment on the status of each content area (goals, success factors, professional development), it will not display the specific content, so have a copy of the performance development plan on hand to refer to (print or electronic). To print a copy, scroll to "My Evaluations" on your "Performance" dashboard, select the current performance development plan and 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.

1. Navigate to your Performance dashboard.
 - a) Select "Interim Check-In" from "My Tasks".

The screenshot shows the 'Performance' dashboard for Tracy Test Employee. The 'My Tasks' section is highlighted with a red box, and the 'Interim Check-In' task is also highlighted with a red box. The task is due on 10/05/23 and is for the 2023 Performance Development Plan. The 'My Current Evaluation' section shows the 2022 Performance Development Plan, which is due on Tuesday, December 20, 2022. The dashboard also includes a sidebar with navigation options like Dashboard, Tasks, People, Performance, and Reports.

- b) A fly-out appears with the **Check-In** questions (refer to the “TIP” above regarding viewing the specific content for each section- goals, success factors and professional development).
- c) Once you have addressed all content areas, select “**Publish**” in the upper right corner.

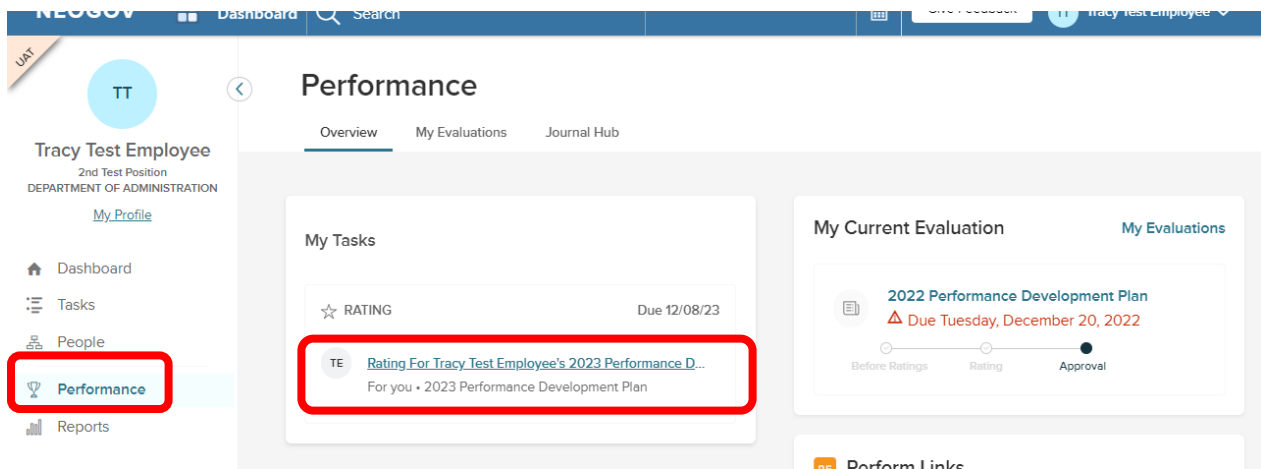


TIP!
Remember, you can always return to your dashboard by clicking on the **NEOGO**V logo in the top left corner of the screen.

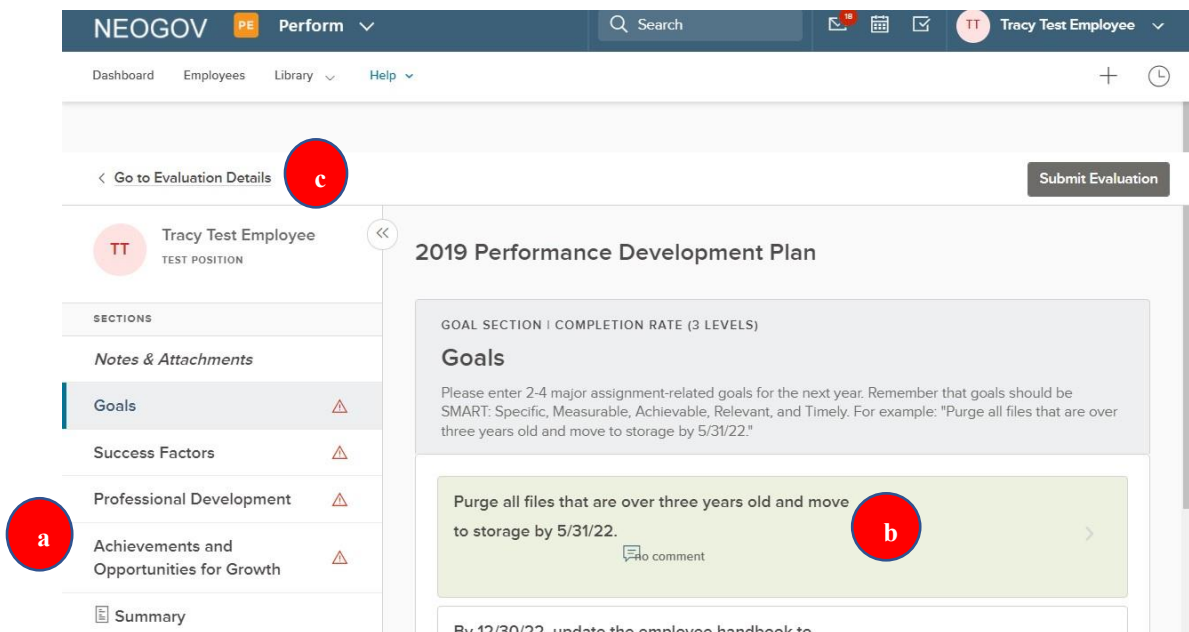
QUICK GUIDE - COMPLETING YOUR ANNUAL SELF-RATING

At the end of the performance development cycle, you will begin the rating process. You should receive a notification from NEOGOV that it is time to complete the “self-rating” task.

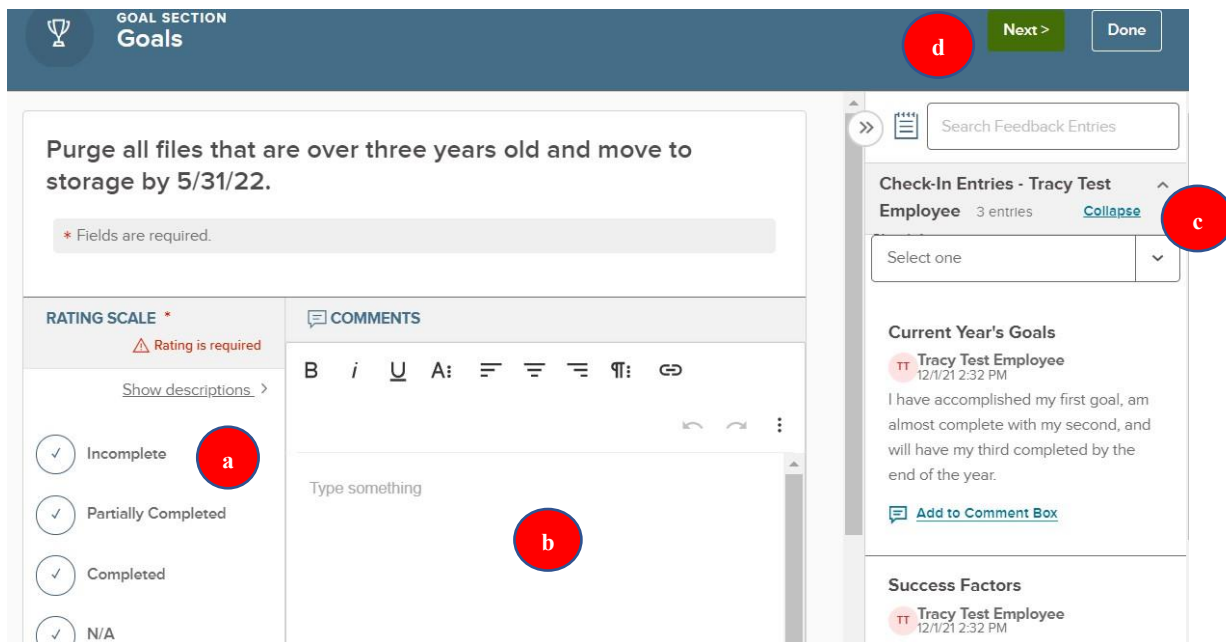
1. Navigate to your **Performance** dashboard.
2. Click on the task to complete your **(Self)-Rating**.



3. You are re-directed to the Rating Form.



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. Upon selecting the item *within* a section (“b” above), the rating card fly-out appears:

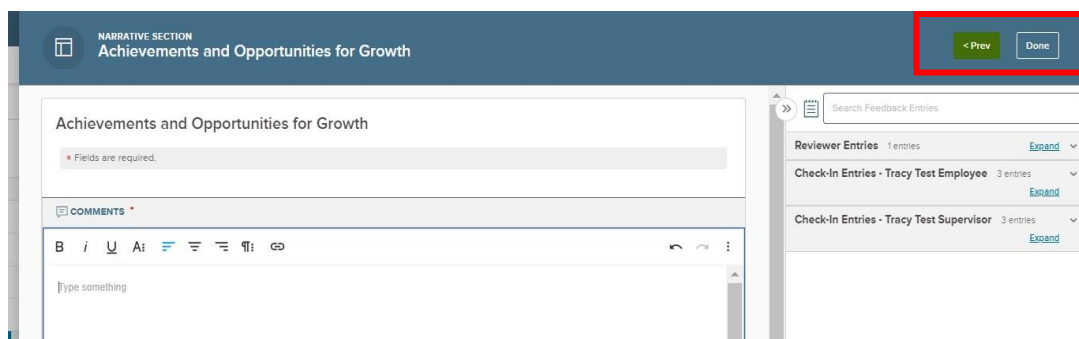


- a. You see a **Rating Scale**. To view a description of each rating scale value, select the **“Show descriptions”** text and a flyout appears with detailed information. Select your self-rating.
- b. Type any text into the **Comments** box. When comments are required, the comments box will be outlined in **red**.

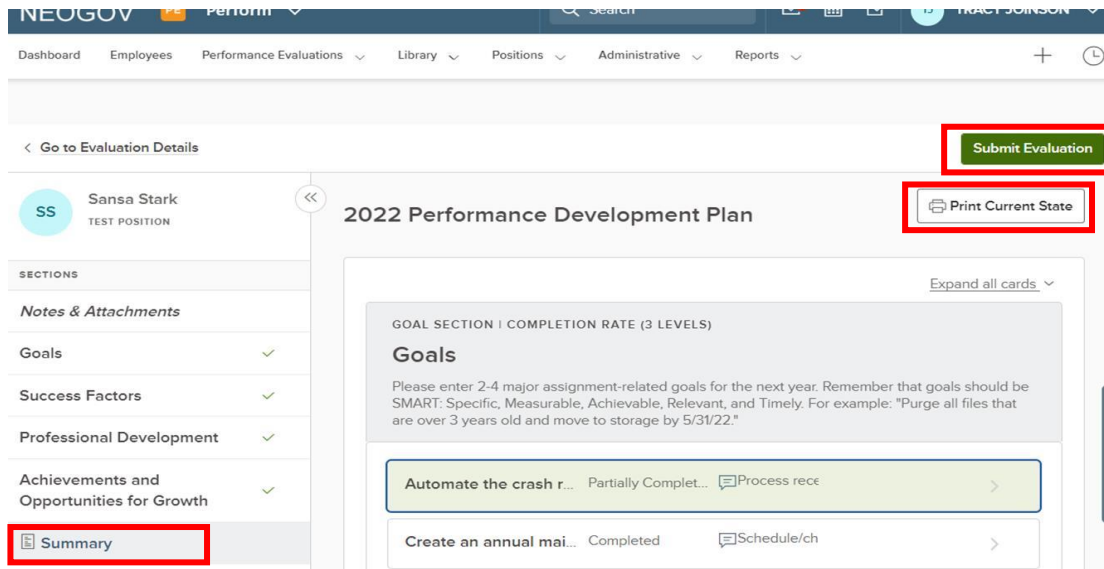
While rating, the system auto saves all progress made so if needed, you may exist out of the rating card and resume rating at a later time

- c. You will see **“Check-In Entries”** on the right side of the card which are your entries from the interim check-in. 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.
- d. To move to the next rating item, click **“Next”** in the top right corner.

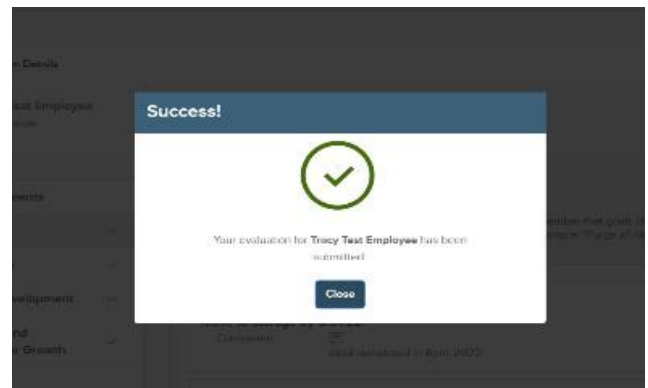
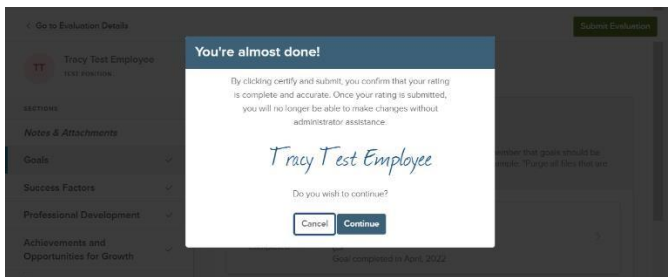
7. The final section, **“Achievements and Opportunities for Growth”**, is where you can list any achievements and challenges from the performance development cycle and what you’d like to focus on moving forward to the next cycle. Select **“Done”** once finished; if you need to go back to review a previous rating, select **“Prev”**.



8. On the next screen, you can click **“Summary”** on the left side of the screen 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
9. To print the current state of the performance development plan for your upcoming meeting with your supervisor, select the **“Summary”** section on the “evaluation detail” page, and then select **“Print Current State”**.
10. Once all required ratings and/or comments are complete, select the **“Submit Evaluation”** button in the top right corner.



11. 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 that you have completed the task and s/he will then complete his/her rating.

Signing Your Completed Performance Development Plan

Once your manager has completed his/her rating and you have met to discuss your respective ratings, you will receive an email notification from NEOGOV to sign your finalized performance development plan.

1. Sign-in to NEOGOV and either navigate to your **Performance** dashboard and click on the signature task, or, if you received an email notification from NEOGOV, click the link provided to be brought directly to the signature task upon logging-in.

The screenshot shows the NEOGOV Performance dashboard. The top navigation bar includes 'NEOGOV', 'Dashboard', 'Search', 'Give Feedback', and the user profile 'Tracy Test Employee'. The left sidebar contains navigation options: 'Dashboard', 'Tasks', 'People', 'Performance' (highlighted with a red box), and 'Reports'. The main content area is titled 'Performance' and has tabs for 'Overview', 'My Evaluations', and 'Journal Hub'. Under 'My Tasks', there is a task 'EVALUATION' due 12/31/23, and a task 'Sign 2023 Performance Development Plan for Tracy Test E...' (highlighted with a red box) for the 2023 Performance Development Plan. The 'My Current Evaluation' section shows a '2022 Performance Development Plan' due on Tuesday, December 20, 2022, with a progress bar for 'Before Ratings', 'Rating', and 'Approval'.

2. You are redirected to the “Acknowledgment Form”. You will see that both your self-ratings and your supervisor’s ratings and comments are now visible.

The screenshot shows the NEOGOV Acknowledgment Form. The top navigation bar includes 'NEOGOV', 'Perform', 'Search', and the user profile 'Tracy Test Employee'. The main content area is titled 'Acknowledgment Form' and has a 'Go to Evaluation Details' link. The form displays the user's name 'Tracy Test Employee' and the evaluation name '2019 Test for TTE' with a due date of 'Tue. Nov. 09, 2021'. A 'Sign' button is highlighted with a red circle labeled '4'. Below the 'Rating Summary' section, there are two rows for 'Tracy Test Employee' and 'Tracy Test Supervisor'. The 'Goals' section is highlighted with a red circle labeled '3'. The 'Goals' table shows a goal 'Bake Cookies- no bake brownies' with a 'Completed' status and a comment 'I don't like my goals. I baked cookies but weren't chewy.' (highlighted with a red circle labeled '2').

3. Navigate through the various **Sections** by clicking on the section name; scroll through each section to review the ratings and any comments provided by your supervisor.
4. Once you are finished reviewing, select the **“Sign”** button. 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.
5. Once you have signed the performance development plan and selected, **“Submit”**, an **“Evaluation was acknowledged!”** banner appears at the top of your screen. The status changes to **“Completed”** and is archived in the NEOGOV system. You may review it at any time in the future by going into the **“My evaluations”** section of your Performance dashboard.

Search

Sign

Cancel Submit

Comments

Write comment here...

Please sign your name below

Your signature certifies that you have read the evaluation and that your supervisor has discussed its contents with you. It also certifies that you have had an opportunity to record your comments above.

Tracy Test Employee

Tracy Test Employee November 09, 2021

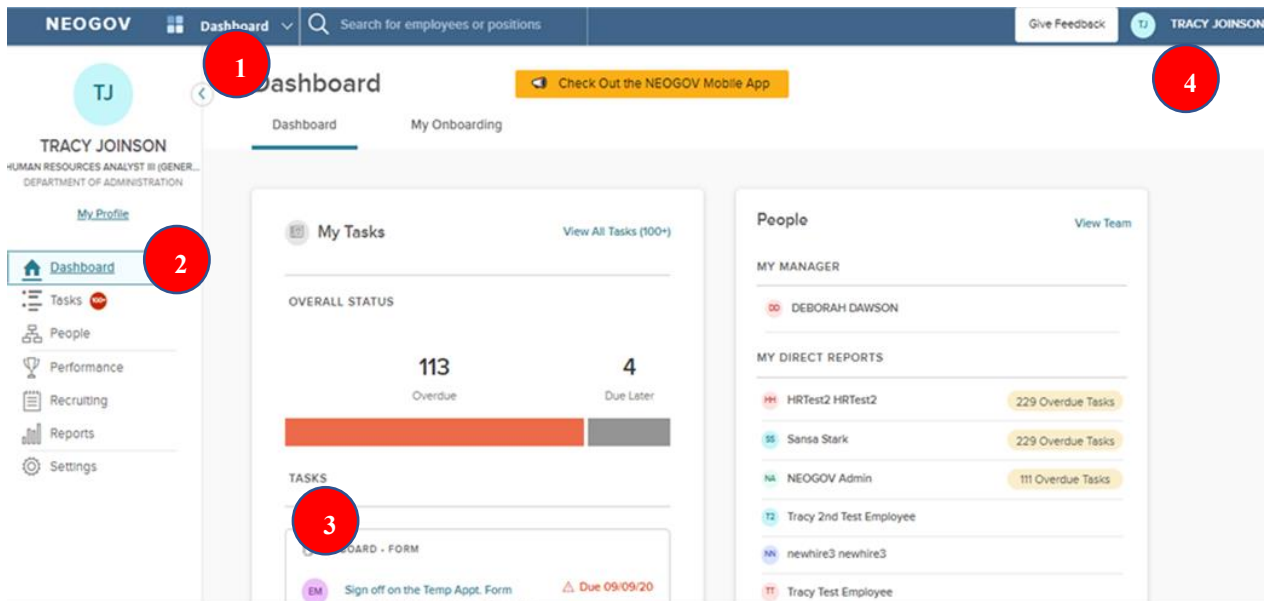
Auto-Generate Draw Signature

PLEASE NOTE: Signing the performance development plan does not indicate that you agree with the contents, rather that you met with your supervisor and 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 your org. chart of your reporting structure.
 - d. **Performance** – a page with helpful links related to performance development.
 - 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, if any, 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 development plans, 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.

The screenshot shows the NEOGOV interface for a user named Tracy Joinson. The left sidebar contains a navigation menu with options: Dashboard, Tasks (highlighted with a red circle and a '100+' badge), People, Performance, Recruiting, Reports, and Settings. The main content area is titled 'Tasks' and shows 'To Do (100+)' and 'Completed (194)'. A message states: 'Only up to a 100 tasks can be displayed at a time. Complete tasks to load more.' Below this, there are two statistics: '114 Overdue' and '3 Due This Week'. There are filter buttons for 'Due Date', 'Product', 'Task Type', and 'For Whom', along with a search bar. A task card is visible with the title 'ONBOARD - FORM' and a due date of '09/09/20'.

People Menu

This page will display all your direct reports if you have any. 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

The screenshot shows the NEOGOV interface for a user named Tracy Joinson. The left sidebar contains a navigation menu with options: Dashboard, Tasks (highlighted with a red circle and a '100+' badge), People (highlighted with a red box), Performance, Recruiting, Reports, and Settings. The main content area is titled 'People' and has tabs for 'My Team', 'My Pre-hires', 'My Team's Tasks', 'Org Chart', and 'Employee List'. The 'My Team' tab is active. There are buttons for 'Sort' and 'Filters', and a search bar labeled 'Search by Name or Position Title'. Two employee cards are displayed: one for 'T2 Tracy 2nd Test Employee' and another for 'NA NEOGOV Admin' with a red badge indicating '111 Overdue Tasks'. Each card has an 'Actions' dropdown menu.

Performance Menu

By selecting the “Performance” menu on the left, you will be brought to all activities related to performance development.

1. Any tasks related to performance development 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.

The screenshot shows the Performance dashboard for Tracy Joinson. The left sidebar contains navigation options: Dashboard, Tasks (100%), People, Performance (selected), Recruiting, Reports, and Settings. The main content area is titled 'Performance' and has three tabs: Overview, My Evaluations, and My Team's Evaluations. The 'My Tasks' section, marked with a red circle '1', displays a task titled 'APPROVAL' due on Thursday, with a sub-task 'Approve and Sign Sheriff's Annual 2022 Pe...'. The 'My Team's Evaluations' section, marked with a red circle '2', shows a bar chart for 'ACTIVE EVALUATIONS' with counts for Draft (0), Before Ratings (0), Rating (0), and Approval (1). Below this is an 'OVERDUE TASKS' section with a large '0' in a circle and the label 'Overdue'.

3. “**My Evaluations**” a link to your own current performance development plan (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 performance development plans (if any).

The screenshot shows the Performance dashboard for Tracy Joinson, with the 'My Evaluations' tab selected, marked with a red circle '3'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Performance' and has three tabs: Overview, My Evaluations (selected), and My Team's Evaluations. The 'My Evaluations' section features a status bar with a dropdown menu currently set to 'Active'. Below the status bar, there are two sections: 'Current (0)' and 'Upcoming (0)'. The 'Current (0)' section displays 'No records available'.

4. “My Team’s Evaluations” displays all active performance development plans for your direct reports with a clickable link to each as well as a color-coded category box for each task status type.

The screenshot shows the NEOGOV Performance dashboard for Tracy Joinson. The main section is titled "Performance" and has three tabs: "Overview", "My Evaluations", and "My Team's Evaluations". The "My Team's Evaluations" tab is selected and highlighted with a red circle containing the number "4". Below the tabs is a status bar with four categories: "Draft" (0), "Before Ratings" (0), "Rating" (0), and "Approval" (1). Below the status bar are "Sort" and "Filters" dropdown menus, and a search bar labeled "Search by Employee or Evaluation name". The "All Evaluations" section shows a card for "Sheriff's Annual 2022 Performance Appraisal" due Friday, September 9, 2022, for "Tracy Test Employee". A progress indicator shows the current status is "Rating".

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.