# NEOGOV PERFORM:

# 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

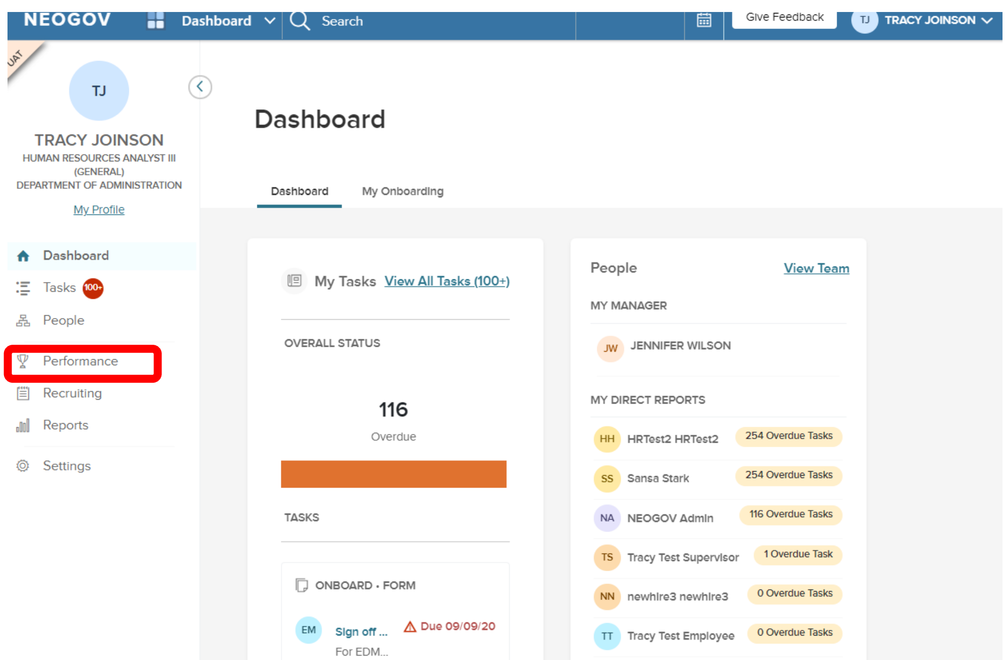
To log into Perform, go to: [https://performance.neogov.com/login](https://performance.neogov.com/login).


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

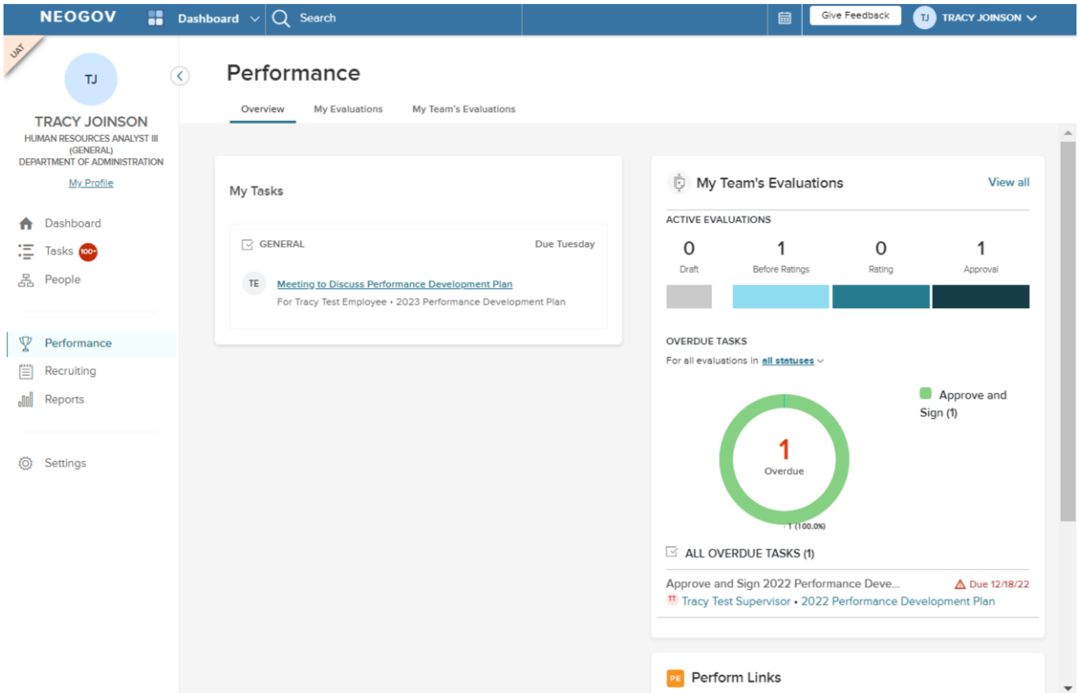
**Your username is your work/state-issued email address; your password is whatever you established when you initially created your NEOGOV account.*


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](mailto:doa.performancedev@hr.ri.gov) as your account may need to be activated.

Once logged-in click on "**Performance**" in the side menu:



Which will bring you to the Performance dashboard:




# *QUICK GUIDE* - INITIAL MEETING & ENTERING CONTENT INTO A PERFORMANCE DEVELOPMENT PLAN (Goals, Success Factors & Professional Development Activities)

## *Initial Goal Setting Meeting*

The first step is to schedule an initial goal setting meeting with your direct report(s). This meeting allows the supervisor and employee to set expectations for the annual performance development cycle. The supervisor and employee should 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/preselected)

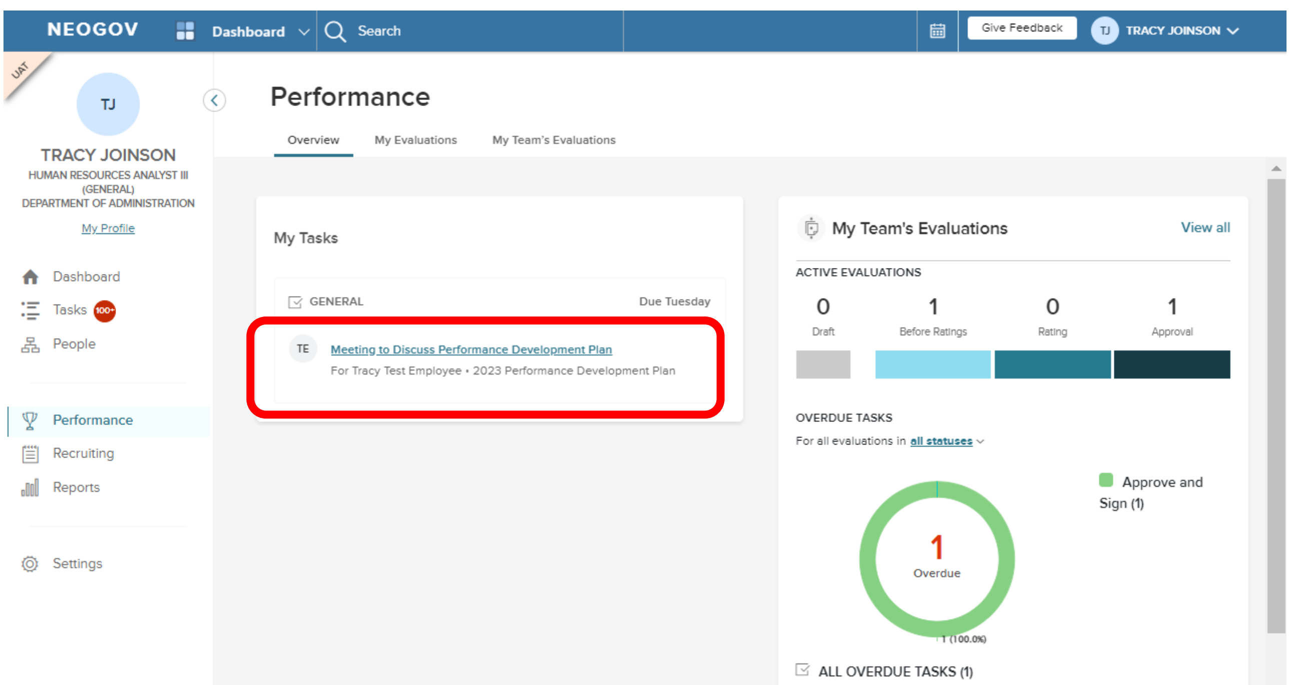
3. Professional Development - opportunities that could help the employee achieve his/her peak performance.

Now that once you have met, you will need to **(1)** acknowledge the meeting and **(2)** add the content you decided upon during the meeting to the performance development plan in NEOGOV.

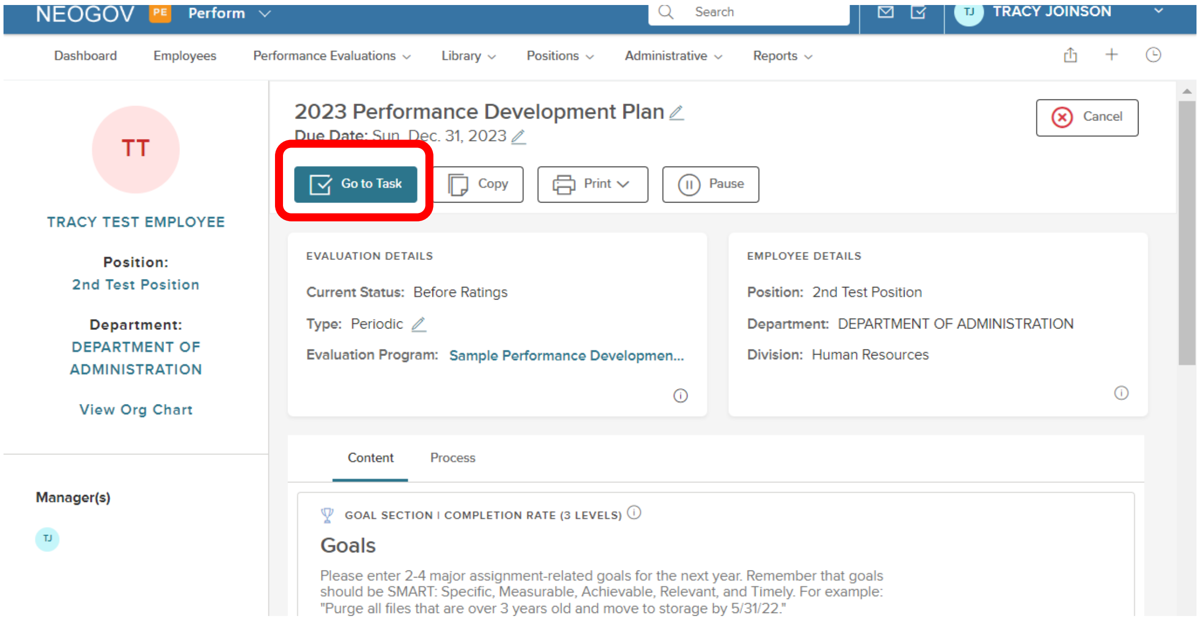
**TIP!**
You can always return to your dashboard by clicking on the **NEOGOV** logo in the top left corner of the screen.

Acknowledging the Initial Goal Setting **Meeting**

1. From the "**My Tasks**" section of your dashboard click on the meeting task:



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

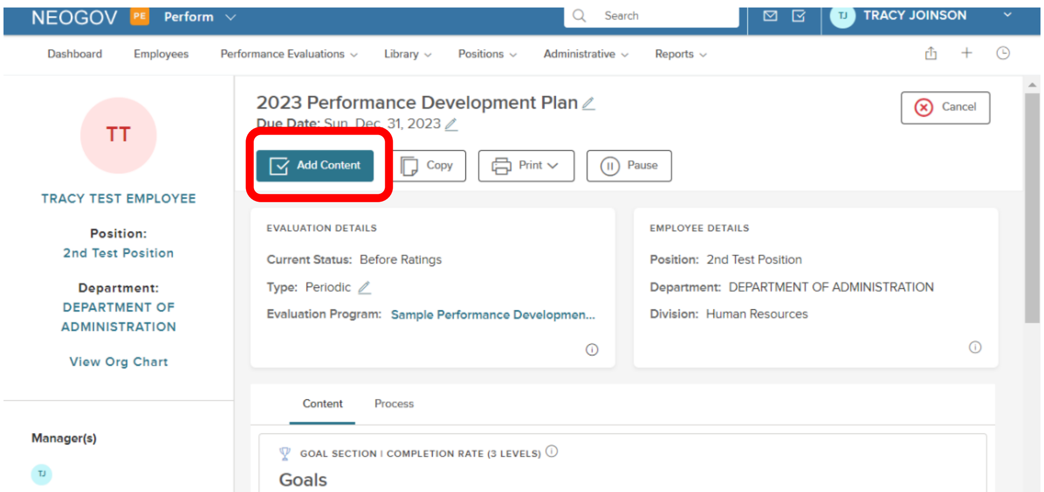



3. A fly-out will appear; enter any comments you would like to note, such as the date of the meeting, and then click, “**Complete Task**”.

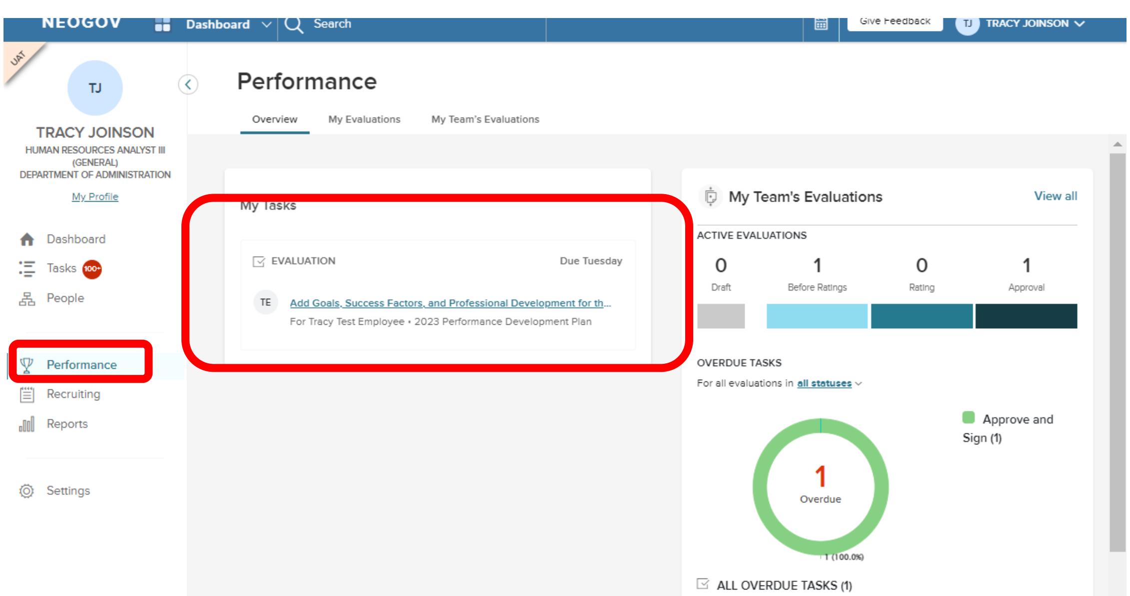
Once this is done, the task is removed from the “**Current”** task section of the dashboard and immediately replaced with the next task which is to add your direct report’s finalized goals, success factors and professional development activities to his/her performance development plan.

## *Entering Content - Goals, Success Factors and Professional Development Activities into the Employee's Performance Development Plan*

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 development plan:

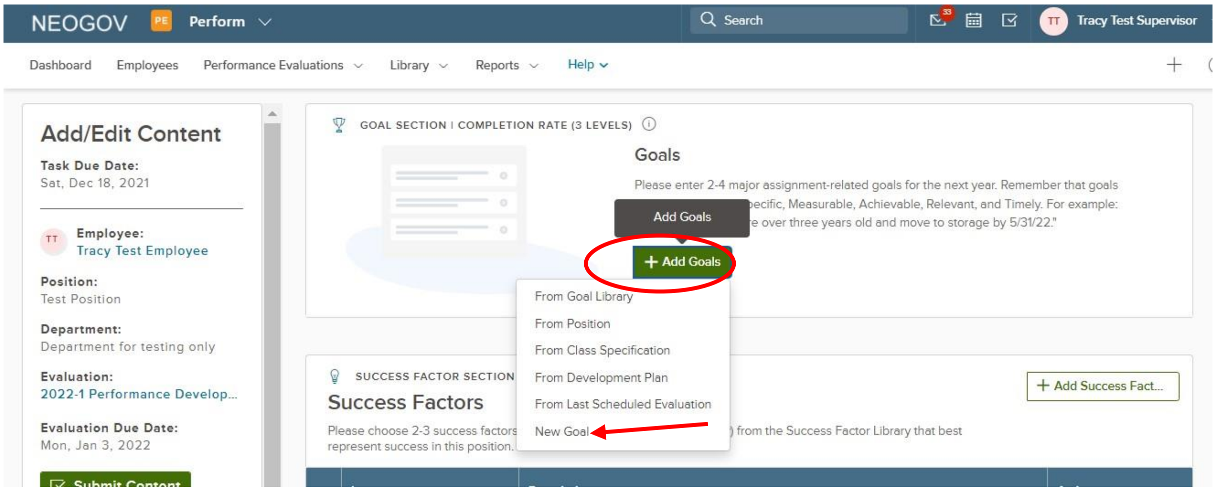



Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task (**"Add Goals, Professional Development Goals, and Success Factors to the Performance Development Plan")** on your "**Performance**" dashboard:

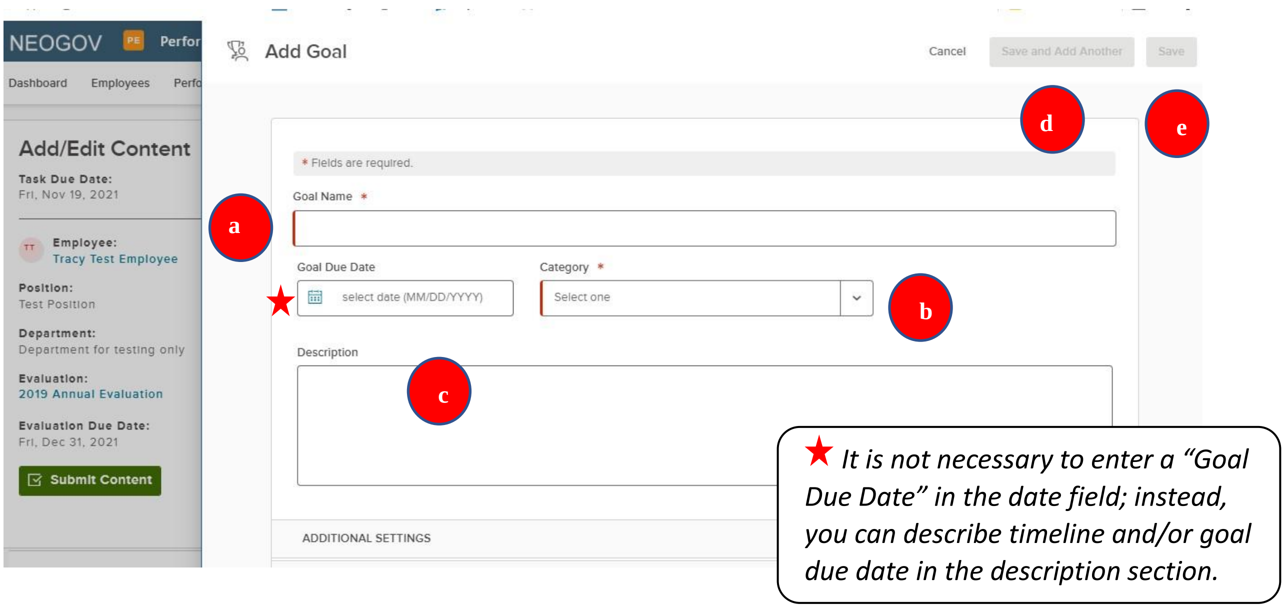



You are re-directed to the employee's content entry page where you will see there are several sections; you must now enter the specific content into each, beginning with the "Goals" section.

1. First, select “**+Add Goals”,** then **“New Goal”** from the dropdown menu to create a new goal.

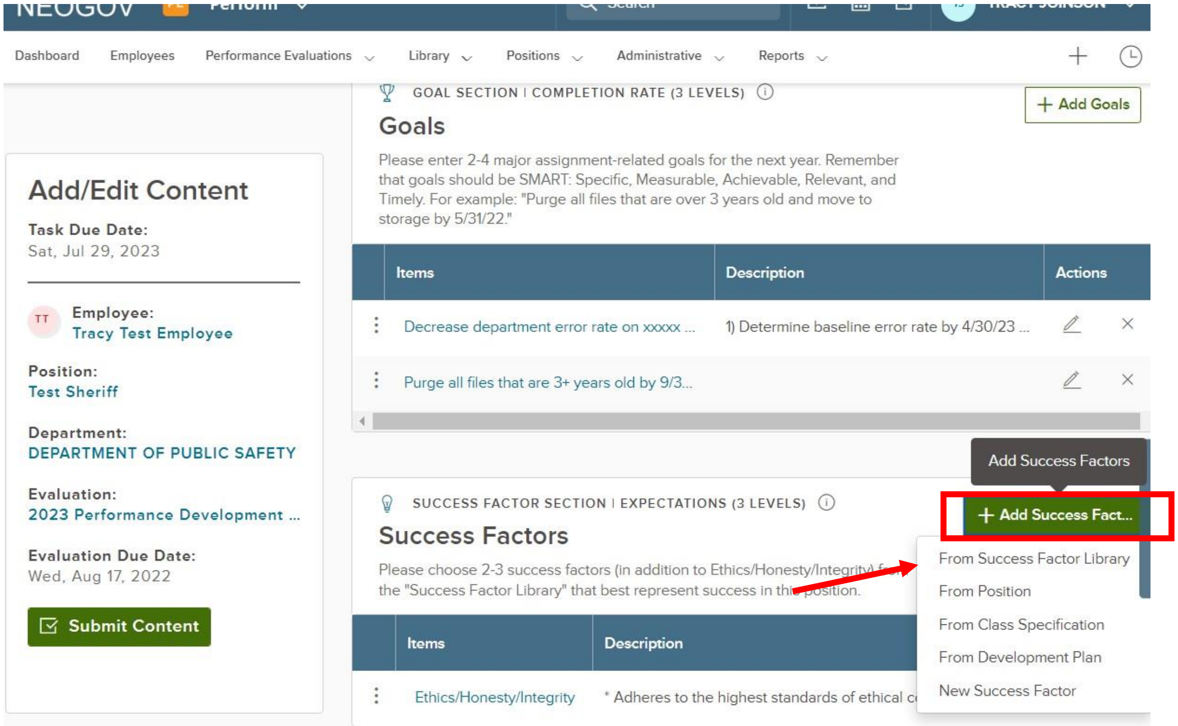



A fly-out appears to enter the goal details:

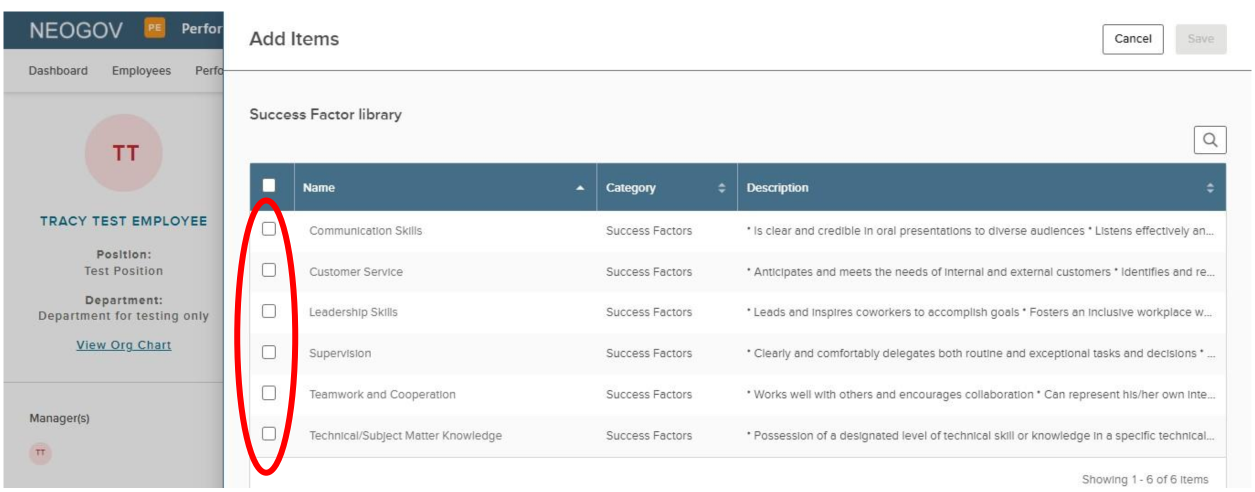



a) Enter the **Goal Name.**
b) Select **Employee Goal** for the category.
c) Enter in a **Description** (optional, although this is a good place to document the S.M.A.R.T. goal details).
d) Click, **“Save and Add Another”** until you have created the last goal. (Remember that every employee should have 2-4 SMART goals).
e) Upon creating the last goal, instead select “**Save**”.

Now Select “**Add Success Factors”** and select “**From Success Factor Library.”**

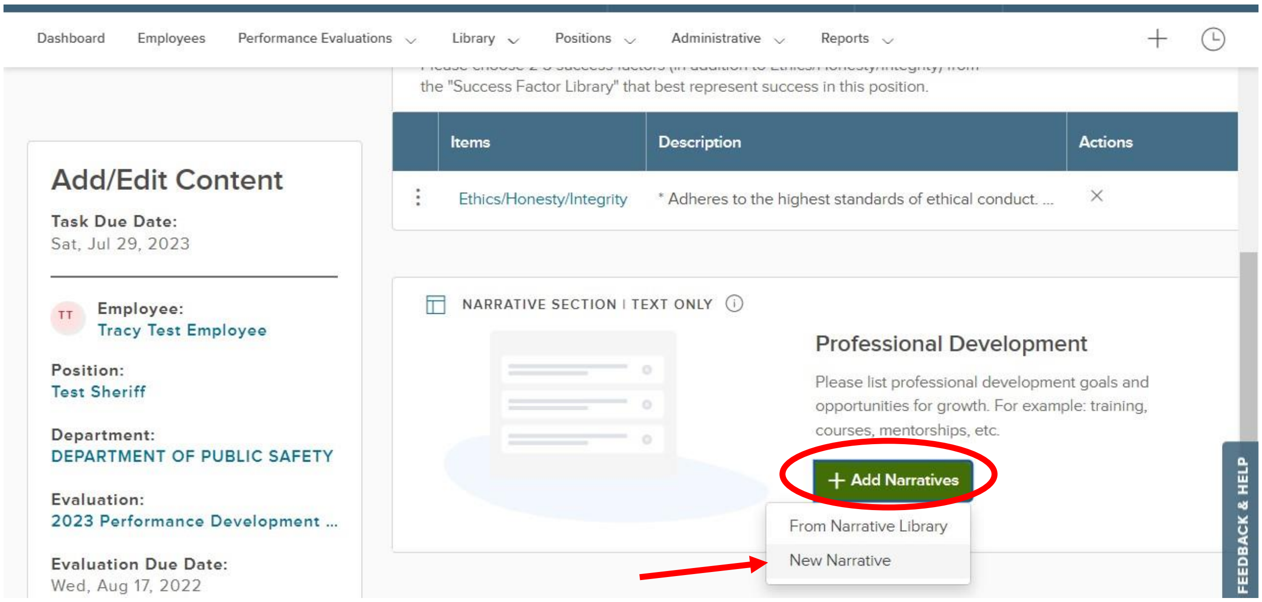



2. You will be brought to the **Success Factor Library**.

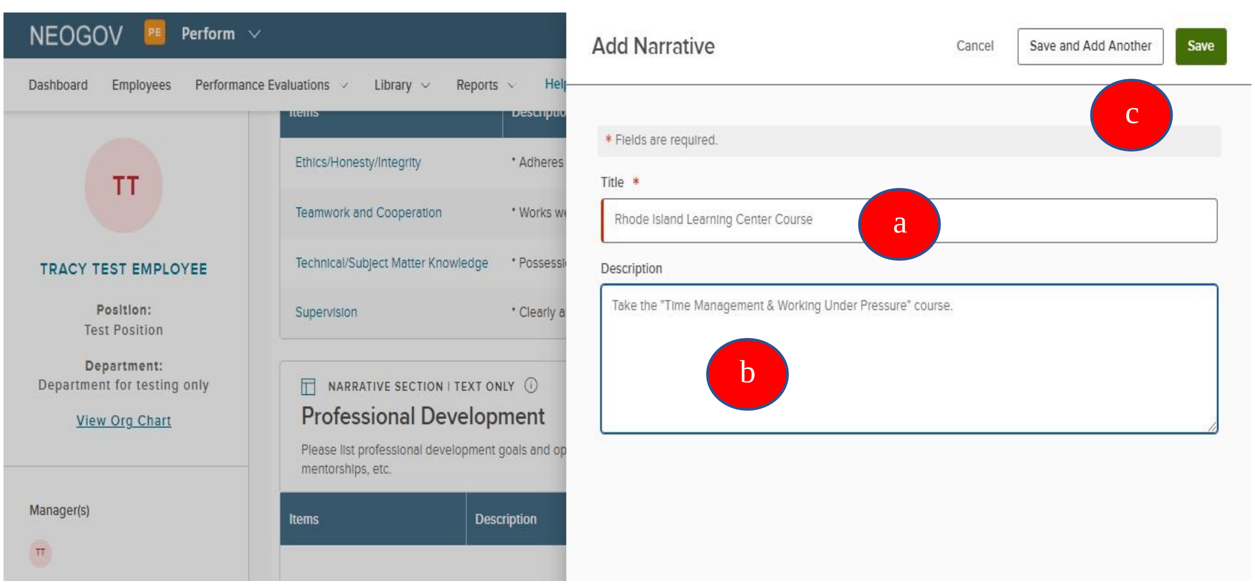



3. Select the 2-3 Success Factors you agreed upon with the employee during the initial goal setting meeting. Select “**Save”** when complete, which will return you to the employee’s main performance development plan page.
*NOTE: All employees will have “Ethics/Integrity/Honesty” pre-filled in their Success Factor content section. This competency is required of all state employees.*

4. **Adding Professional Development Activities**
   You will now add professional development activities to the employee's performance development plan. Select "**+Add Narratives",** then "**New Narrative".**

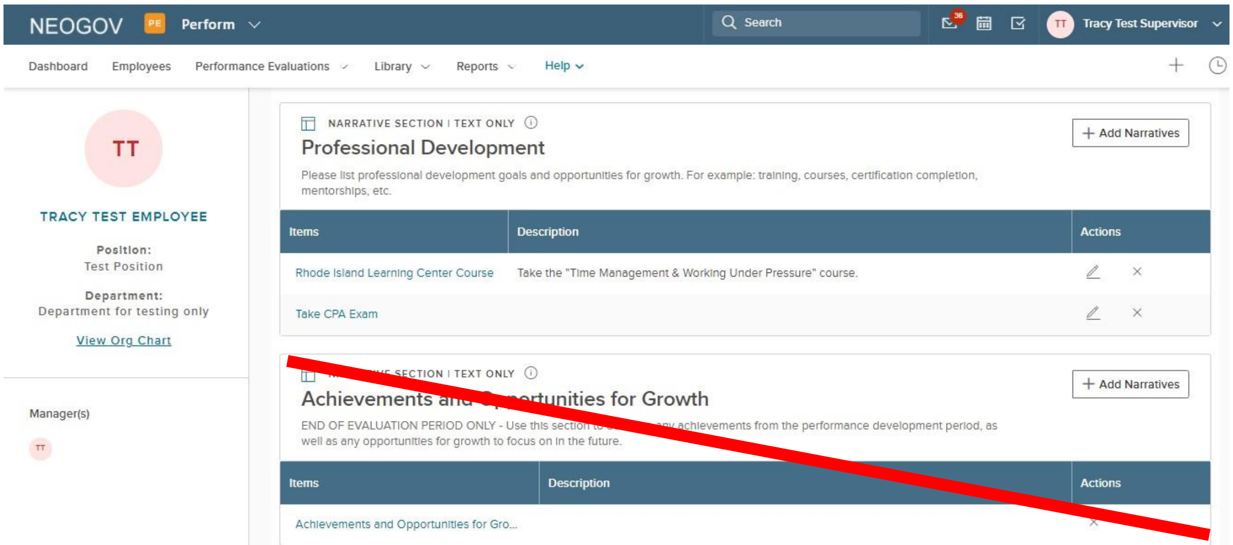



5. A fly-out will appear.
   a. Enter a **Title**
   b. Enter a **Description,** if desired
   c. Select "**Save and Add Another" until you have entered the final professional development activity.** After you have entered the final activity, select "**Save"**, which will again bring you back to the employee's main performance development plan page.

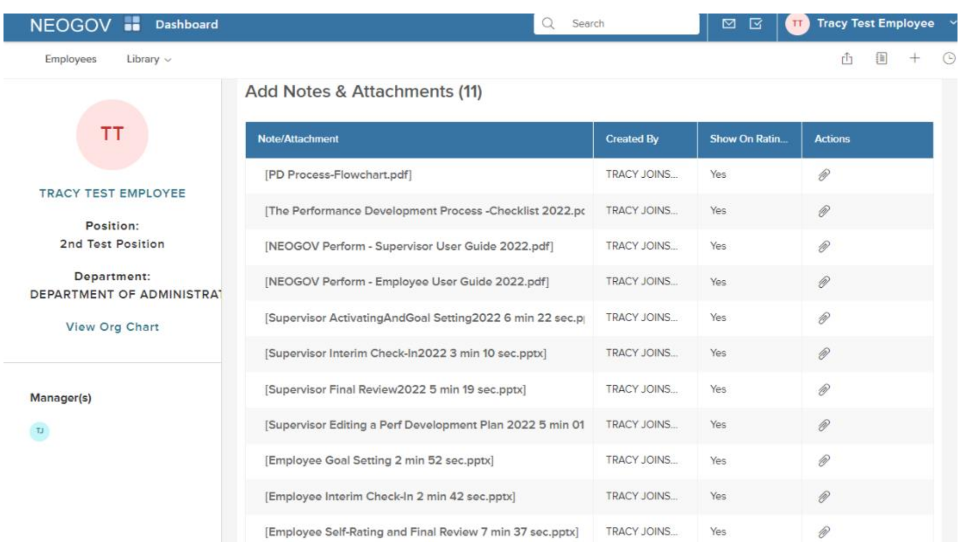


# Important – Please Note:

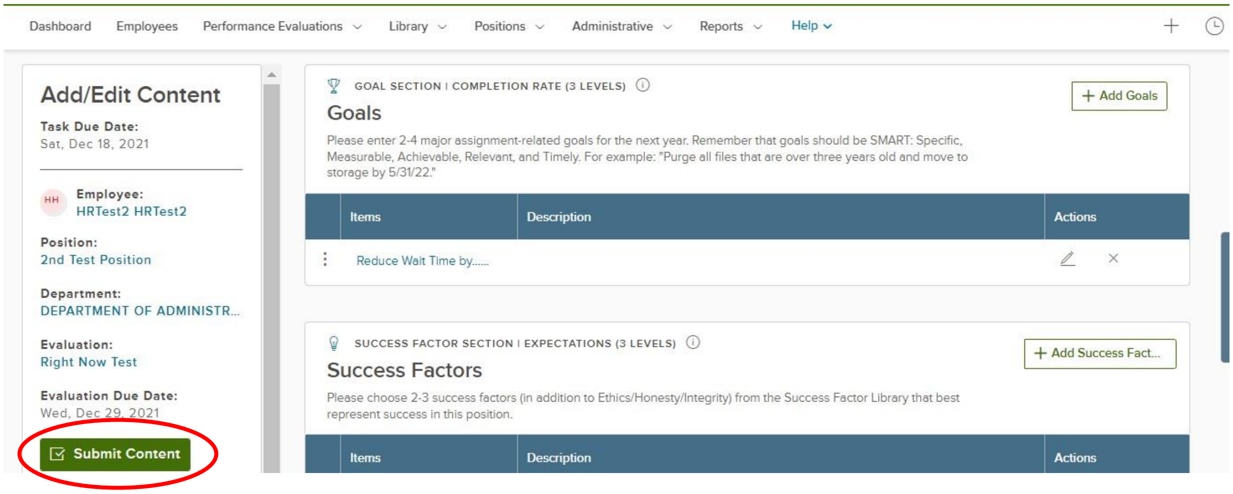
- First, you will ***not*** enter anything for the "Achievements and Opportunity for Growth" section at this time. This section will be completed during the final review phase.




- Second, if you scroll past the "Achievements & Opportunities for Growth" section, within every performance development plan there is a "Notes & Attachments" section which has a link to this *User Guide* (PDF) and narrated video tutorials for each step of the way.



6. Once the goals, success factors and professional development activities have been added, select **"Submit Content"**. A confirmation message will appear; select the appropriate option.

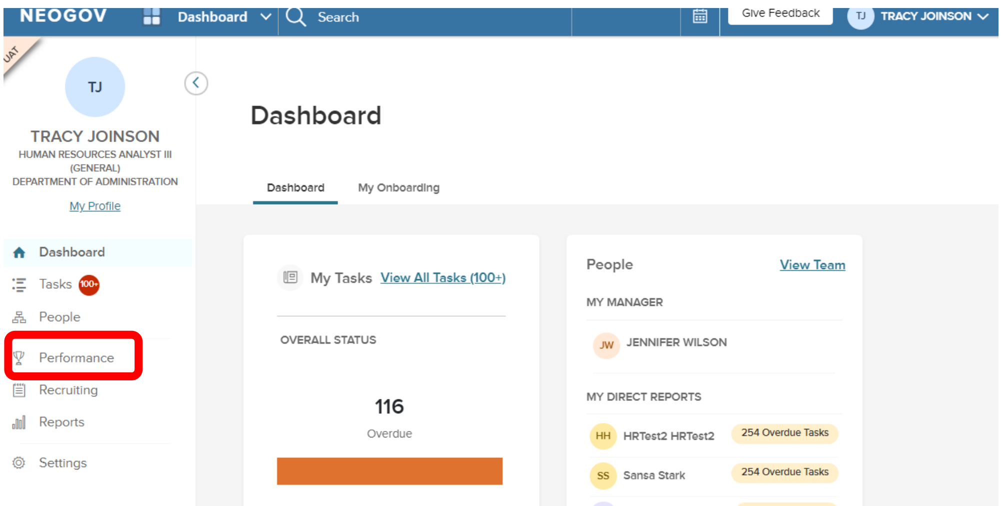



**Once completed, please alert your direct report that you have completed entering content and s/he now needs to sign-in to NeoGov to acknowledge the content by signing-off.**

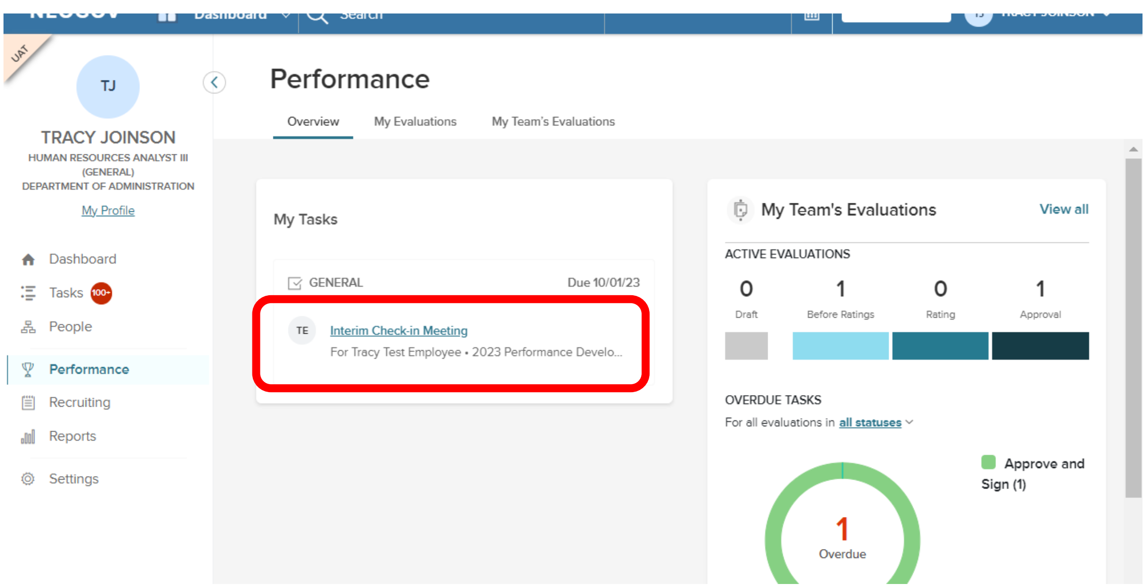
# *QUICK GUIDE* - COMPLETING AN INTERIM CHECK-IN FOR YOUR DIRECT REPORTS

About halfway through your direct report's performance development 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, success factors, and professional development. Once you have met to discuss the status of each, <u>you will need to **(1)** acknowledge the **meeting** in NEOGOV and then **(2)** complete the check-in form.</u>

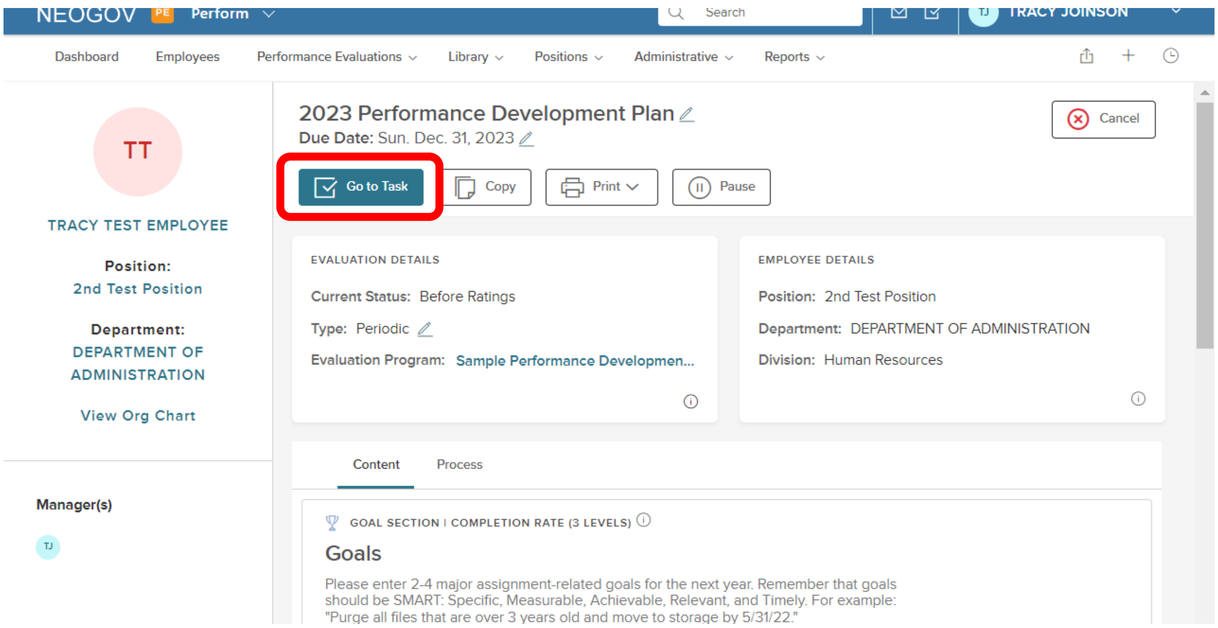
1. Once you have met, to mark the meeting task as completed, log-in to NeoGov and select "**Performance**" on the left menu:



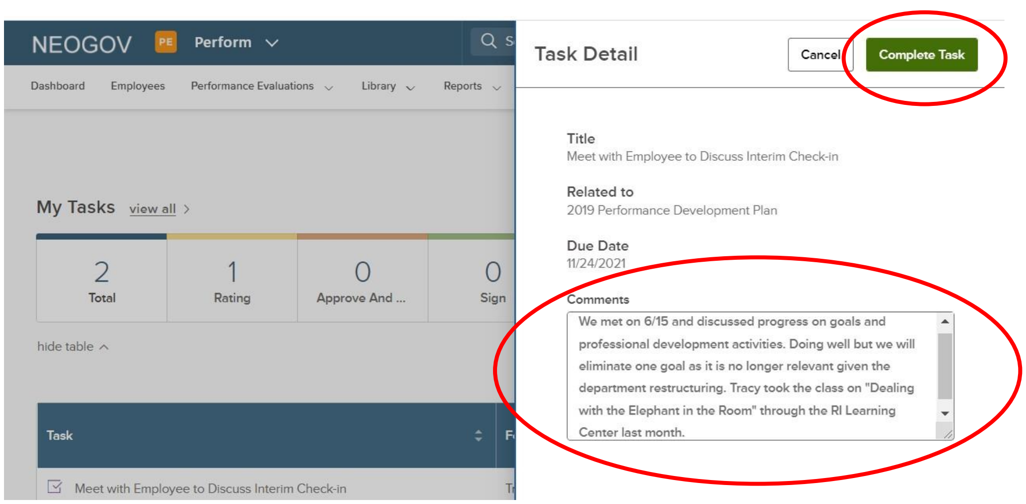

2. then "**Meet with Employee to Discuss Interim Check-in**" from the "**My Tasks**" section:



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




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



**TIP**

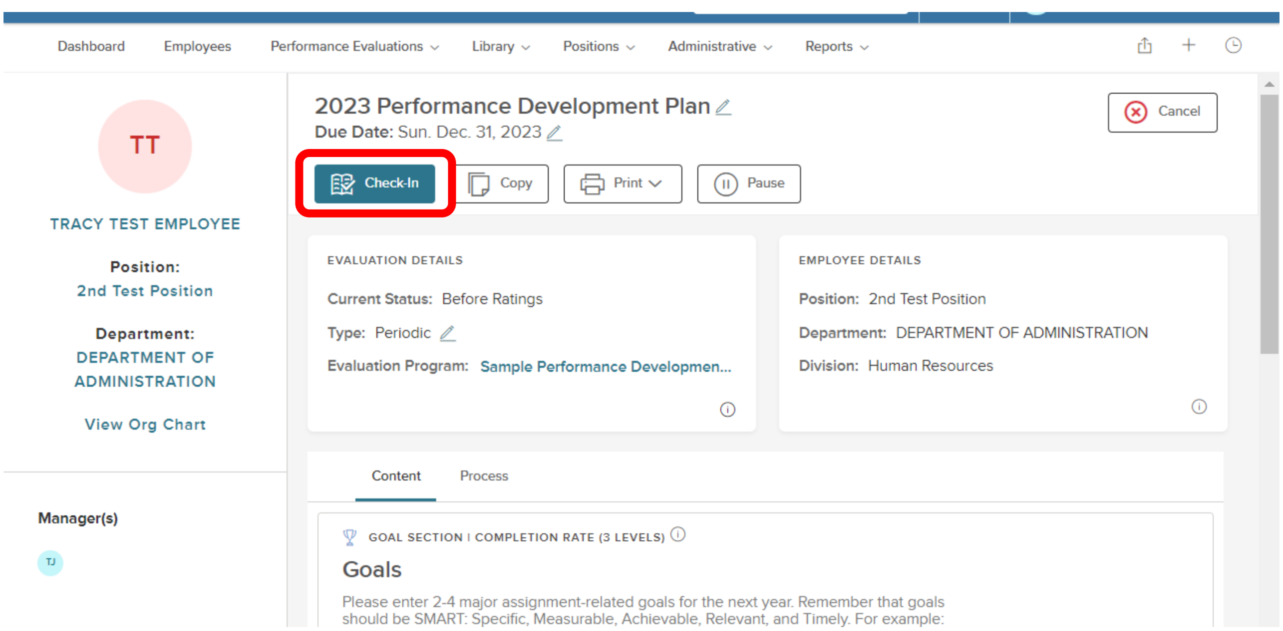
**Although the check-in form will ask you to comment on the status of each content area (goals, success factors, professional development), it will not display the specific content, so have a copy of the performance development plan on hand to refer to (print or electronic). To print a copy, from the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

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 development plan:

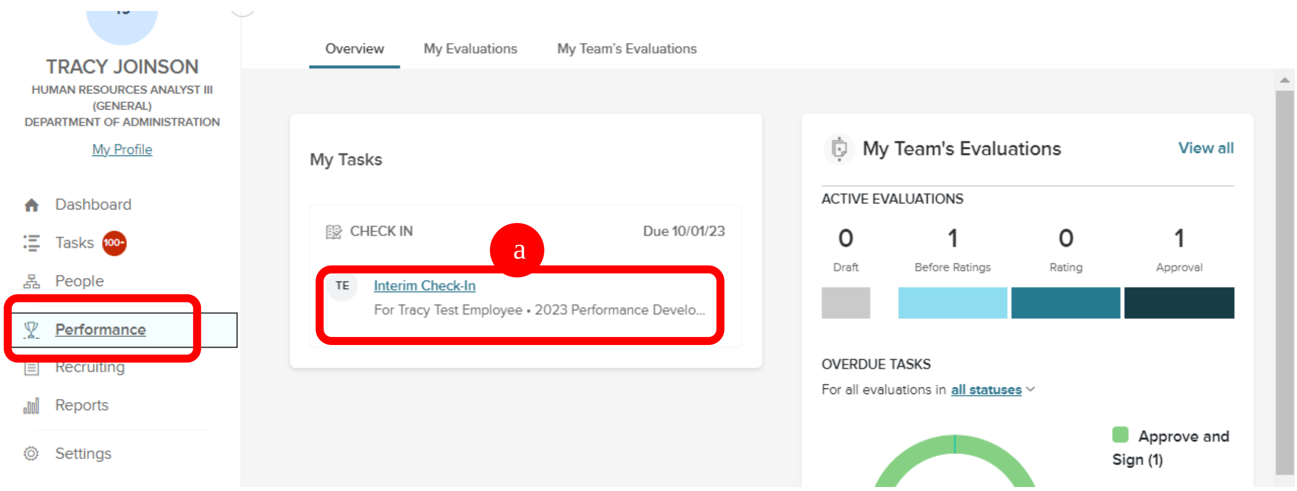
**TIP**

**If you need to make changes/edits to your direct report's performance development plan after having your interim check-in meeting, refer to the final "Quick Guide" (page 22) within this guide, "Editing a Performance Development Plan"**



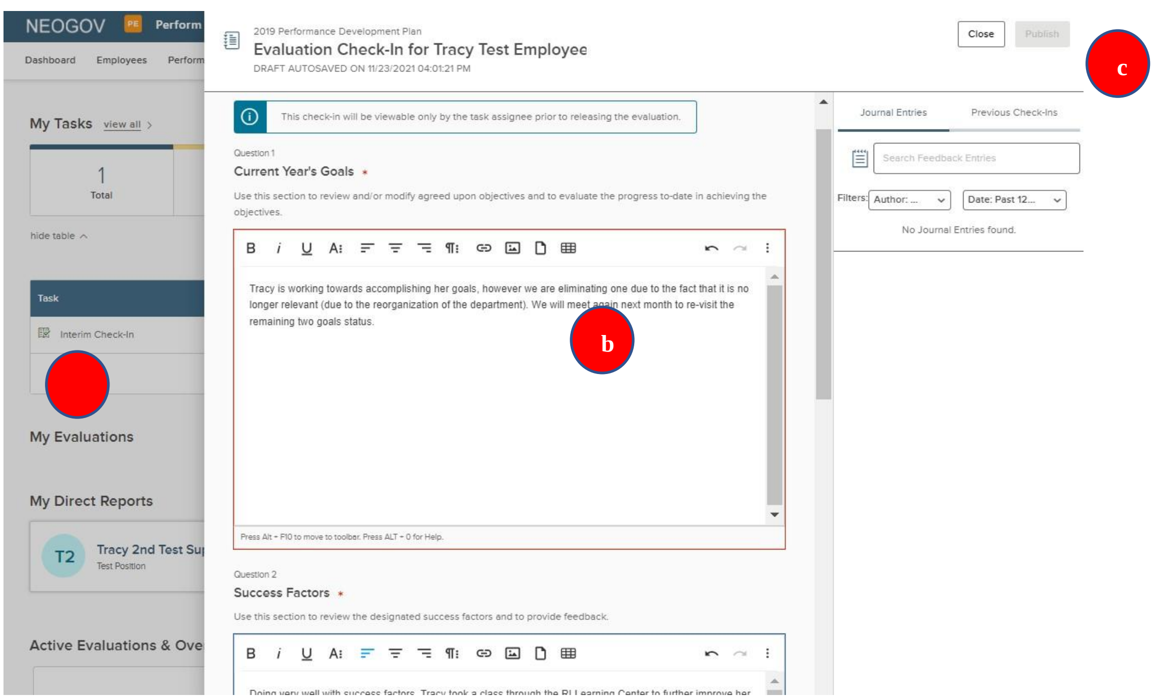
Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task (“**Interim Check-In”)** on your “**Performance**” dashboard.

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




b) 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).*

c) Once you have addressed all content areas, select “**Publish”** in the upper right corner.

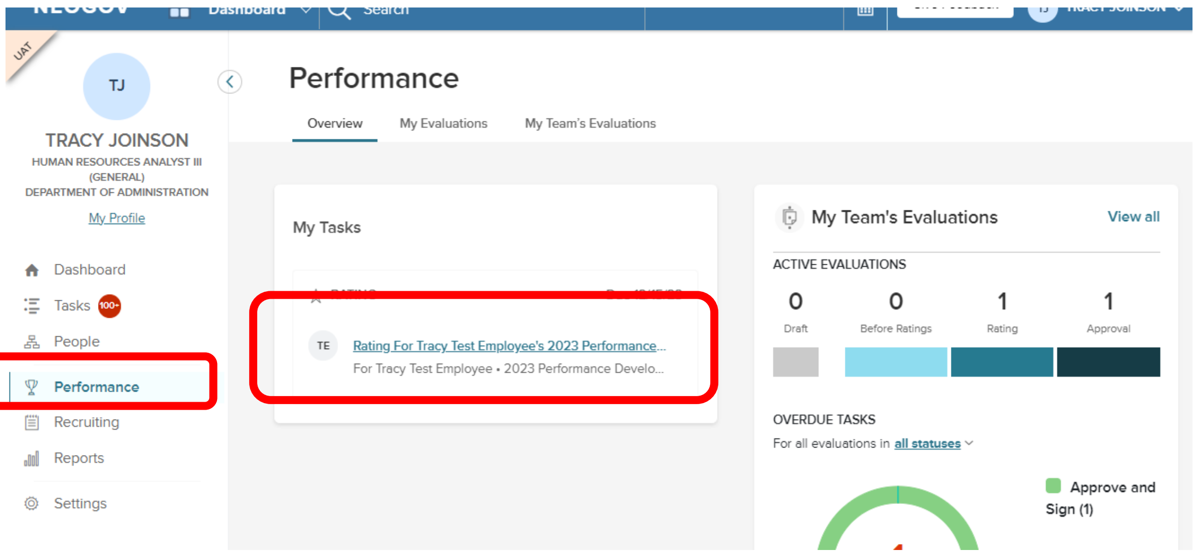



You should alert your direct report(s) that you have completed the interim check-in form so s/he now needs to do the same.

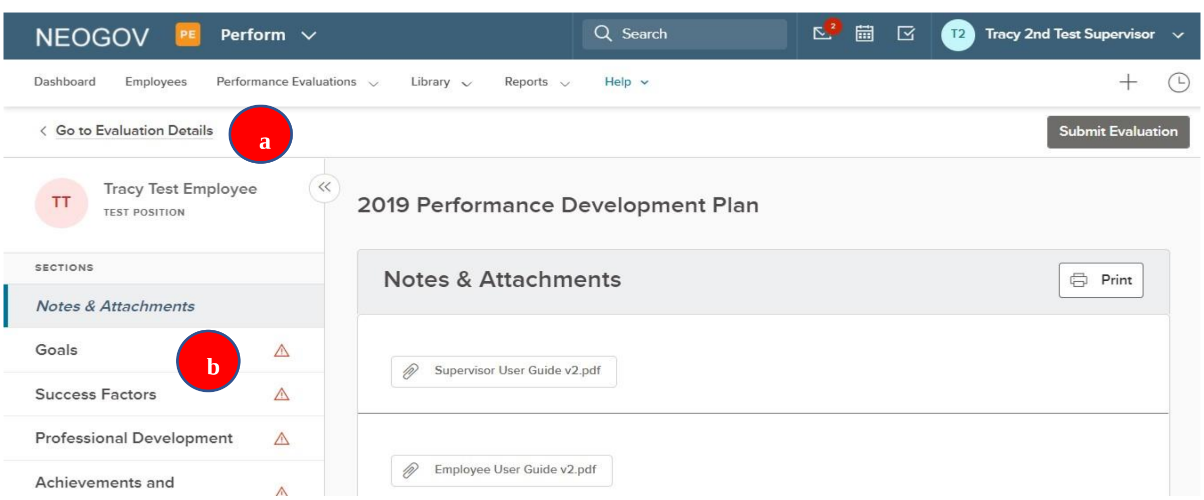
# *QUICK GUIDE* - FINAL REVIEW AND FUTURE GOAL SETTING

At the end of the performance development 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 it is time for you to complete your final review.

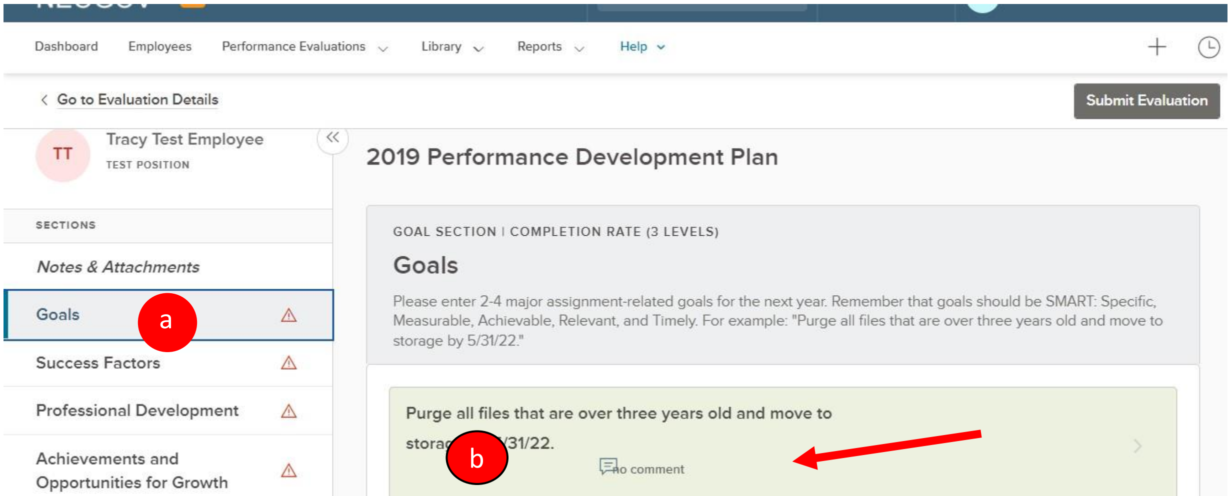
1. Navigate to your *Performance* dashboard or use the link provided in the notification email and click on the rating task.



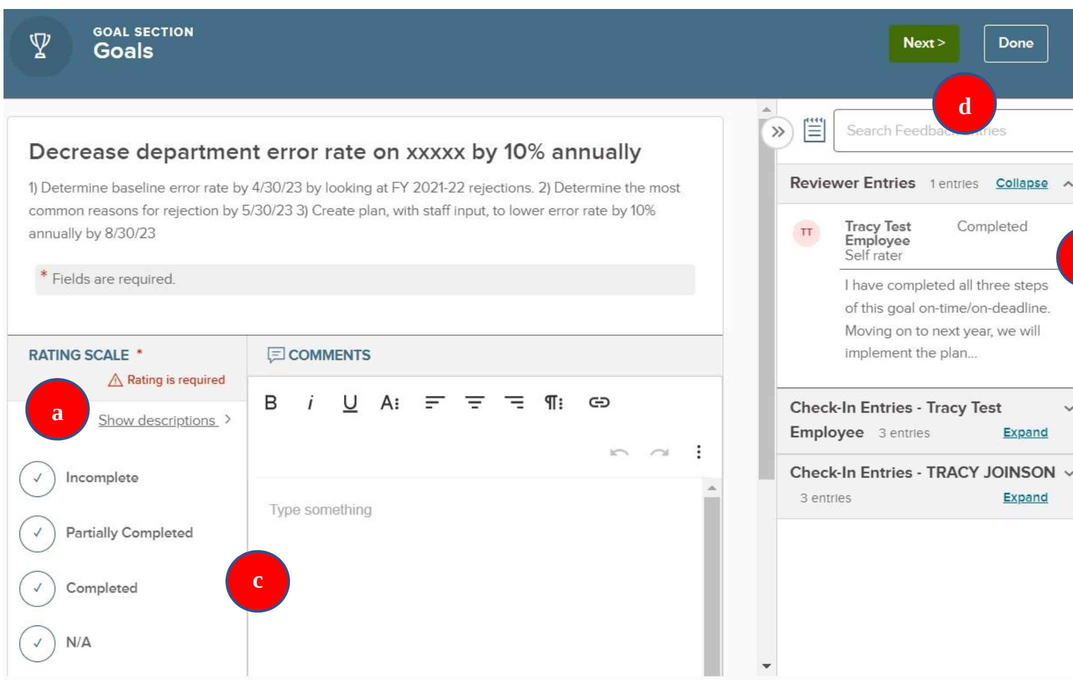

2. The link redirects to the Rating Form.
   a. To leave the rating card and return to the "evaluation detail" page, select "**Go to Evaluation Details"**
   b. To **view the contents of the various sections, click the specific section name to the left.** Note that required rating areas have an alert symbol.



3. To rate an item, select the (a) section name and then (b) an item *within* a section.



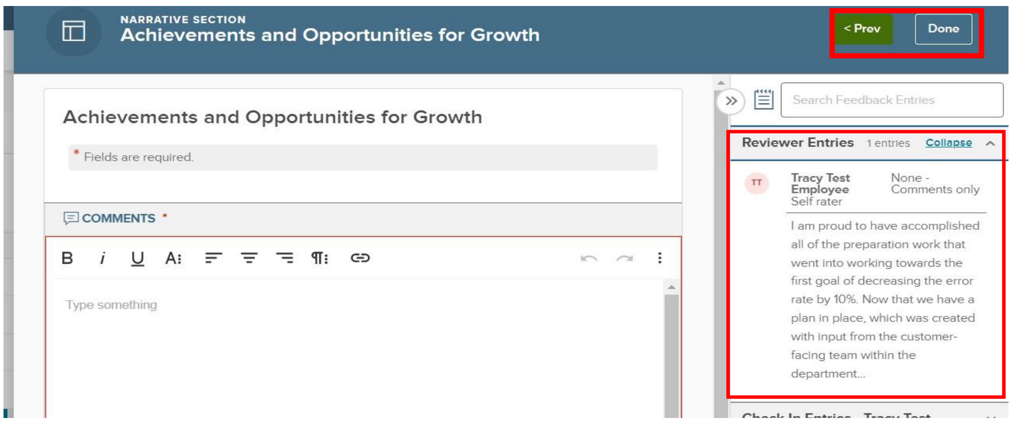

4. Upon selecting the item name to be rated, the rating card fly-out appears.



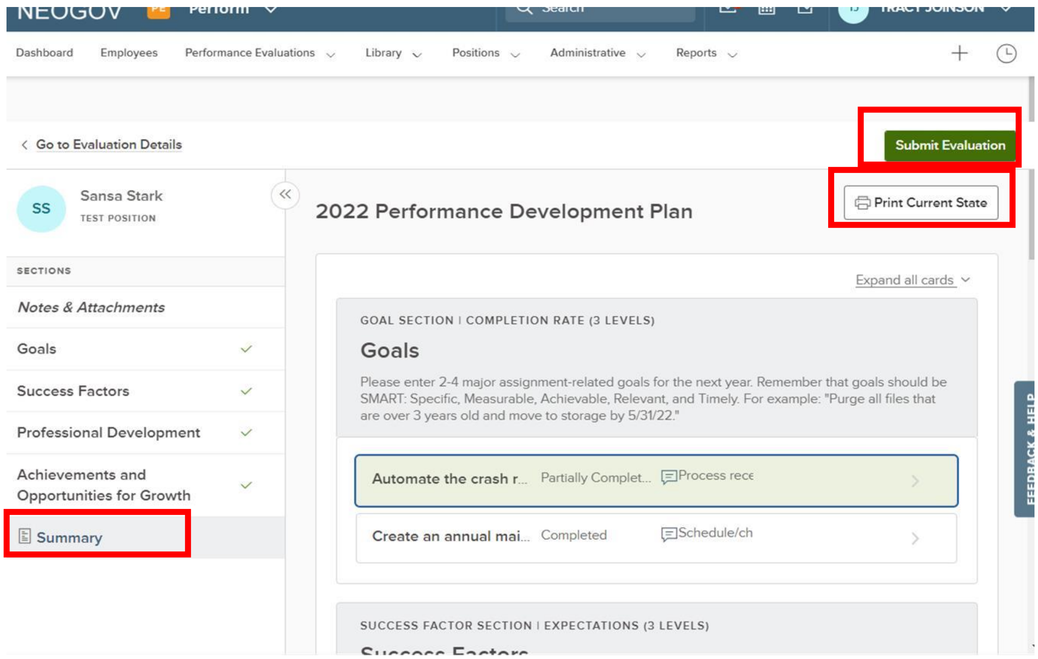

a. You see a **Rating Scale;** to view a description of each rating value, select the "**Show descriptions"** link and an informational flyout appears.
b. The "**Feedback Entries"** appear on the right side of the rating card. If available, you see **Check-In Entries (from the interim check-in),** and **"Reviewer Entries" <u>(your direct report's self-rating).</u>**

c. 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.
d. To move to the next rating item, click "**Next"** in the top right corner.

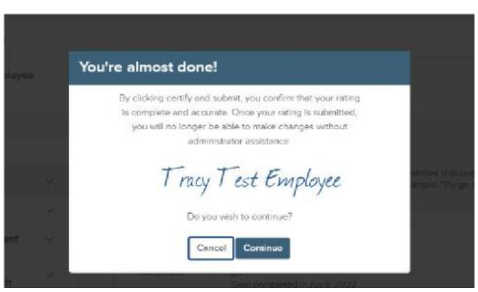
5. The final required section, "**Achievements and Opportunities for Growth"**, is where you list any achievements from the current cycle and what growth opportunities you'd like the employee to focus on moving forward to the next year. Again, ***you can view your direct report's entry for this section by expanding the "Reviewer Entries" box on the right***.
6. Select "**Done**" when finished, or if you need to review an earlier section, select "**Prev**"



7. If you would like to print the current state of the review for your upcoming meeting with your direct report, select the "**Summary**" section on the "evaluation detail" page, and then select "**Print Current State".**
8. Once all required ratings and/or comments are complete, select the "**Submit Evaluation"** button in the top right corner.




9. After submitting, you will get a confirmation message. Once the review is submitted changes can no longer be made without the assistance of HR. <u>**If further changes are needed, click "Cancel"**</u>. Otherwise, select "**Continue**".





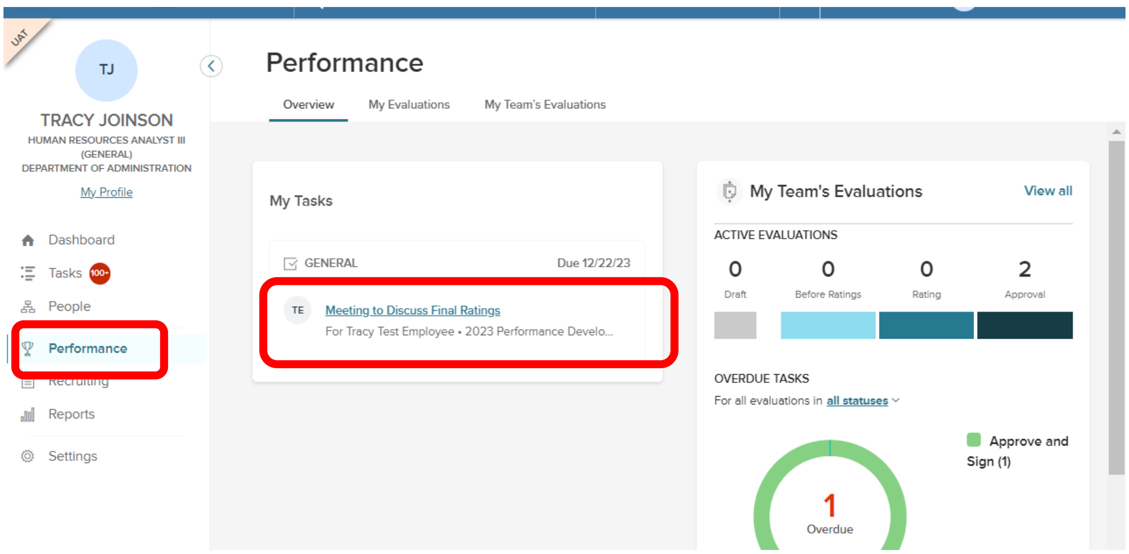
<u>*At this point, you will reach out to your direct report to schedule a review meeting to discuss your respective ratings.* ***DO NOT UTILIZE THE "Go to Task" immediately after completing your rating as you have not held the meeting yet- which is the next task/step in the process.***</u>

## *Final Review and Future Goal Setting Meeting*

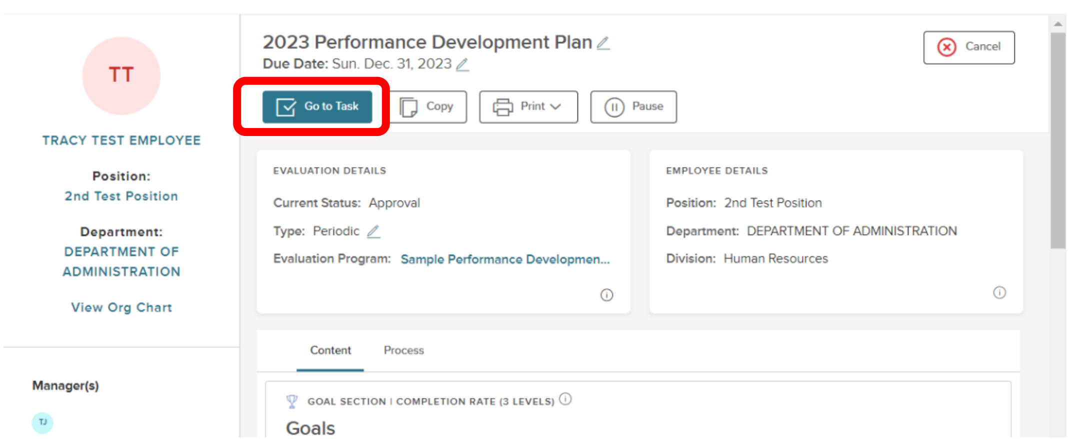
This meeting allows the supervisor and employee to discuss the similarities and differences, if any, in their respective ratings. During this meeting, you can also discuss the upcoming year's goals, success factors, and professional development activities.

After you have met with your direct report, you will need to log into NeoGov to acknowledge the meeting.

1. To do this, navigate to your **Performance** dashboard and select the "**Meet with Employee to Discuss Final Ratings"** from your "My Tasks" area:




2. On the next screen, from within the employee's performance development plan, select "Go to Task":

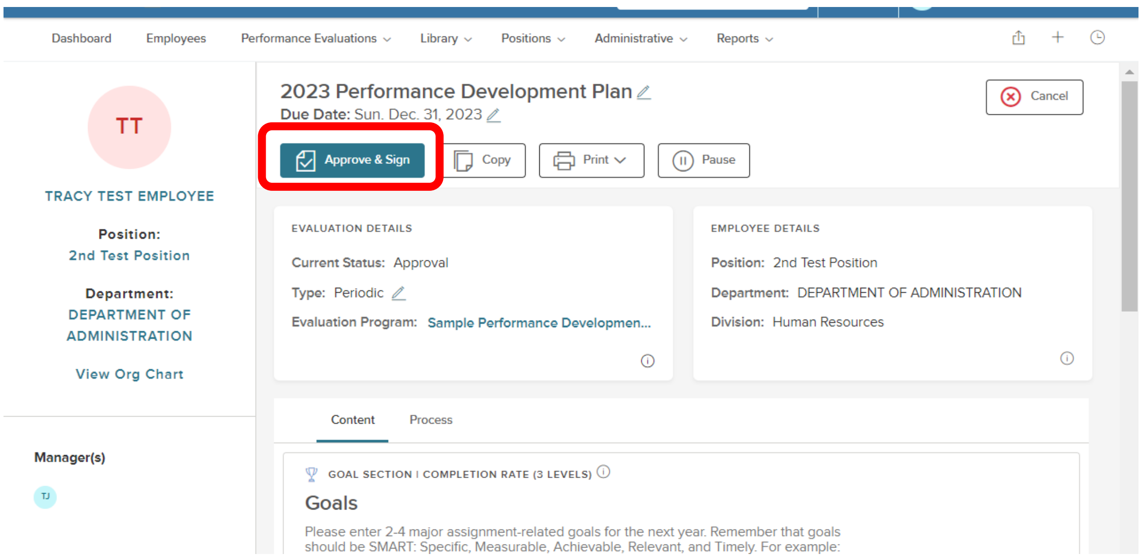



3. A fly-out will appear. Add any comments as desired.
4. Click "**Complete Task"**.

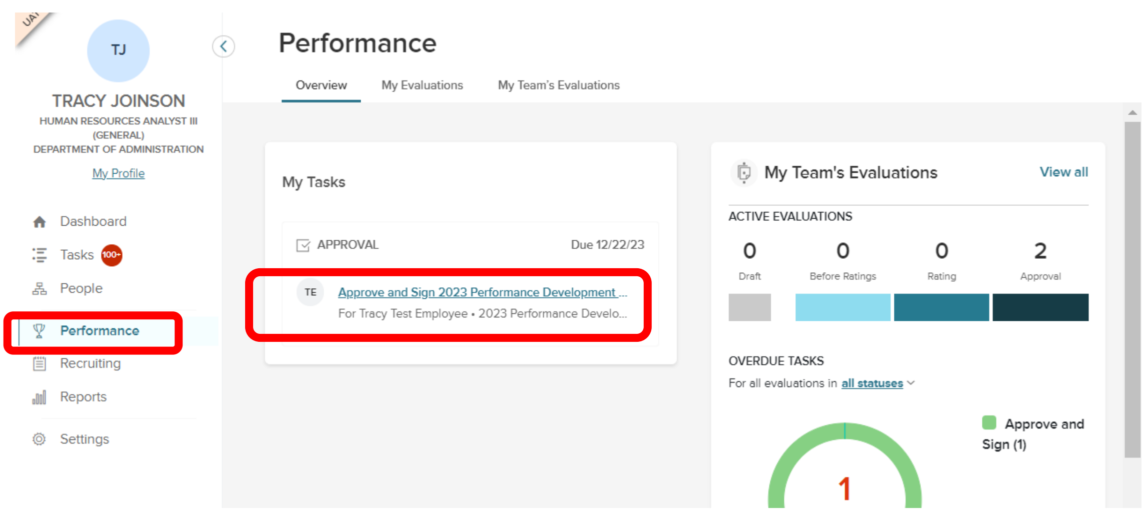
## *Approving and Signing – Your Final Step*

After acknowledging your review meeting with your direct report(s), you need to sign-off on the final version of the performance development plan. **This is also the time when you are able to make changes to your ratings.**

There are two possible methods to get to this task; first, if you are doing so *immediately* after acknowledging the meeting, you will see the "Approve & Sign" box from within the employee's performance development plan:



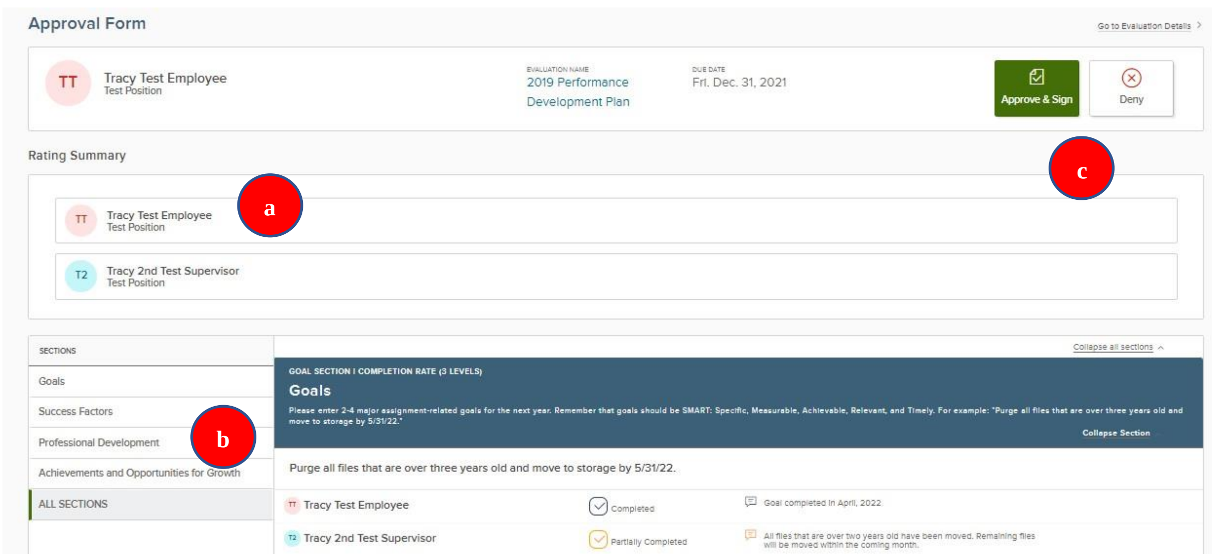

Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, select the task ("**Approve and Sign…")** on your "**Performance**" dashboard.



**TIP!**

To make changes to the performance development plan, 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.

1. The approval/signature page displays with the full performance development plan details:

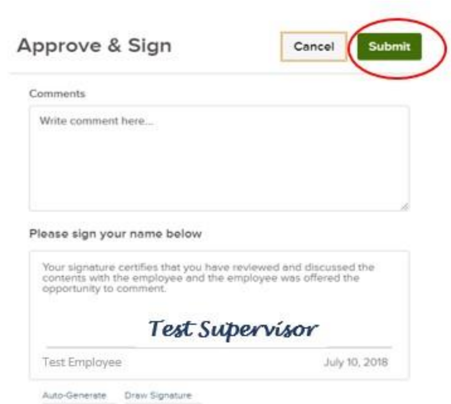



a) **"Rating Summary"**: displays all raters (you and your direct report)

b) You can navigate through the various **Sections** by clicking on the specific section name. Otherwise, scroll through to the bottom to review the ratings and any comments that were entered during the annual cycle.

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 tasks, including the review meeting, are re-triggered*. Otherwise, select "**Approve & Sign".**

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



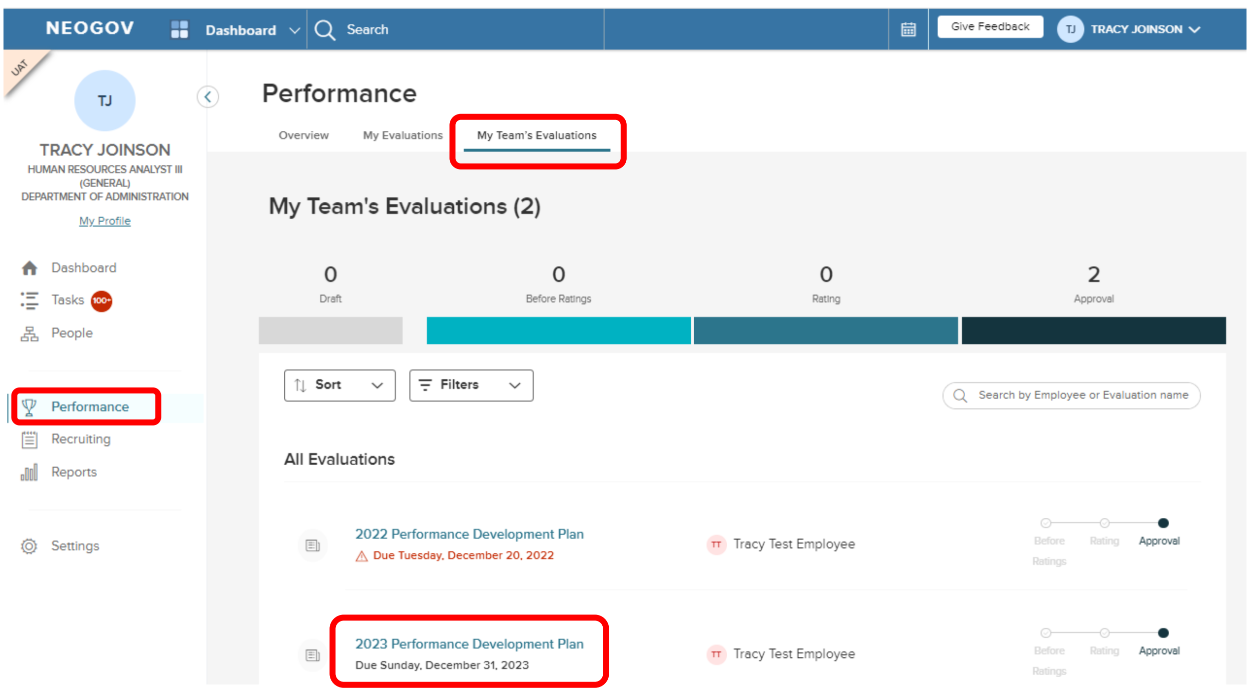

3. Enter in any comments, sign and submit. The system will create an electronic signature for you, but if you'd prefer to create your own signature with your mouse, click "Draw Signature" underneath the signature line.

**Congratulations**! You have now completed your very last step in the current performance development cycle and the performance development plan will be archived in the NEOGOV system after your direct report signs to acknowledge the completion (s/he will now be sent an email notification that it is time to do so). You may review the plan at any time in the future by going into the employee's profile under the "My Direct Reports" section of your *NeoGov* dashboard.

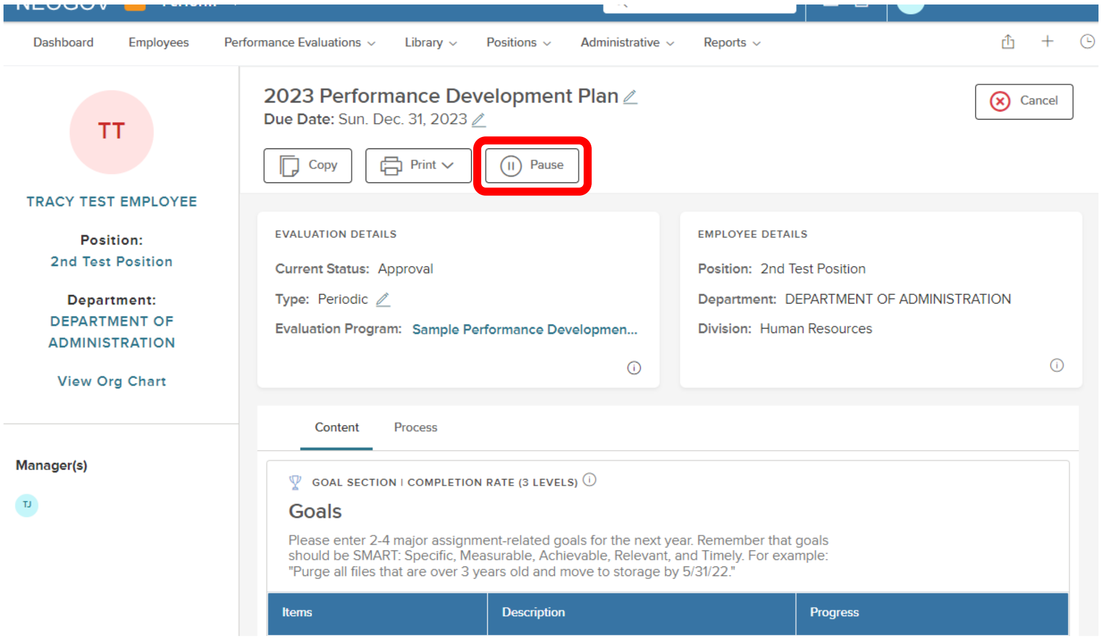
## *QUICK GUIDE* - EDITING A PERFORMANCE DEVELOPMENT PLAN

Occasionally, an employee's goals, success factors, and/or professional development activities will need to be changed during the performance development cycle (i.e., employee transfers into your unit, new assignment, reorganization, etc.). In this case, you will need to edit the plan 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**".

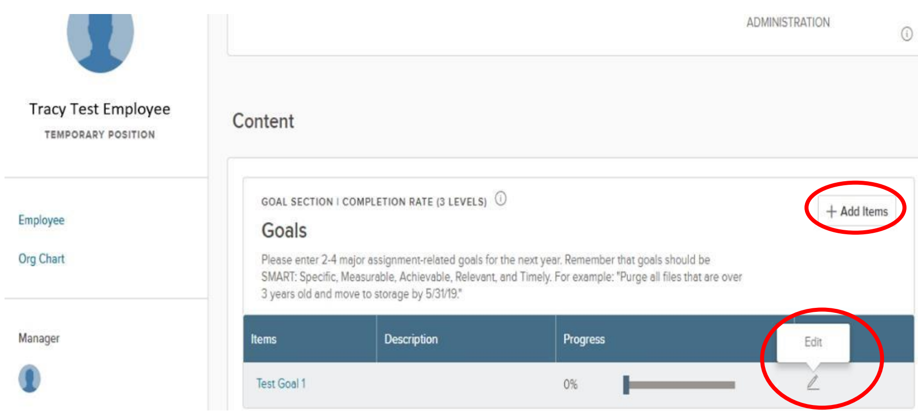


2. To edit the performance development plan, you will need to put it into a **Draft** status. To do so, click “**Pause”**.

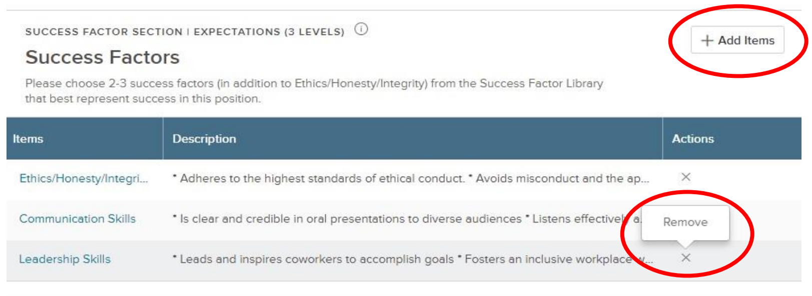



2. Click “**Continue”** on the pop-up screen:


3. To add goals, you can follow the original “Adding Goals” process (“**Add Goals”,** then **“New Goal”)**. To edit *existing* goals, click on the pencil icon to the right of the goal, edit the content, and click “**Save”**.



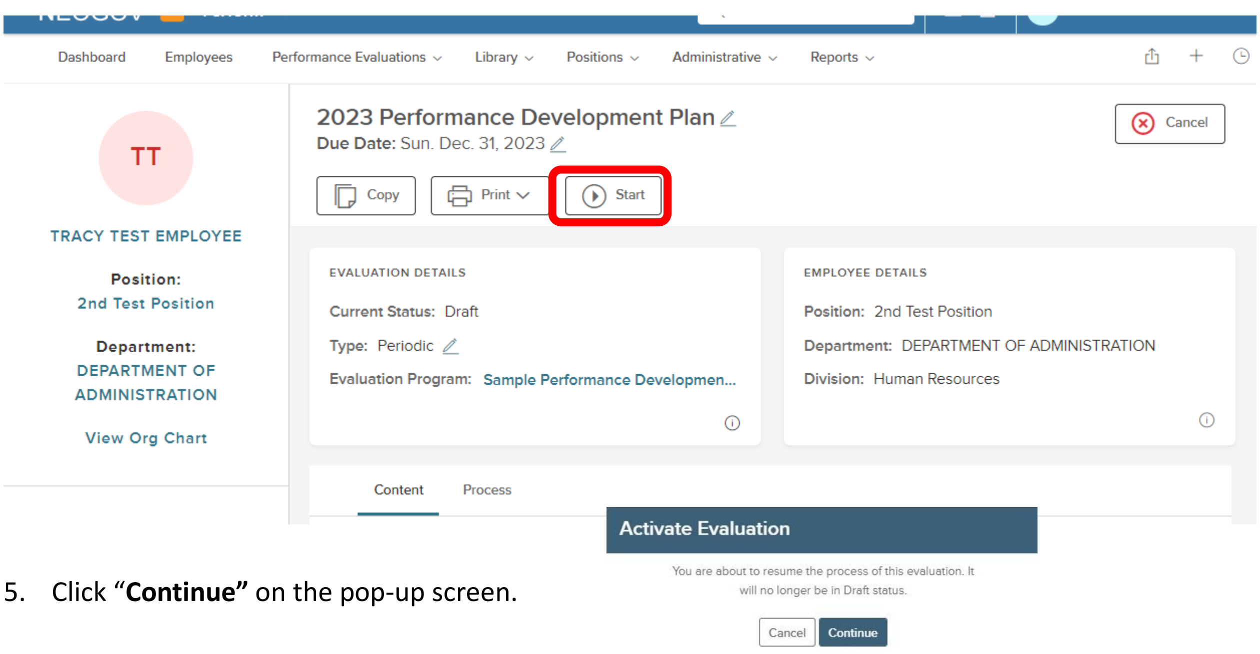
4. To add Success Factors, select **"+Success Factors**", "**From Success Factor Library**". To remove, click on the "X" to the right of the success factor. ***NOTE***: *<u>Ethics/Honesty/Integrity is required for all employees. You may not remove that success factor from any employee's evaluation</u>*.




The steps are the same for adding/editing/removing professional development activities; to add, "**Add Narratives", "New Narrative"**.

**IMPORTANT**

**When complete, make sure to take the performance development plan is taken out of "Draft" status by clicking "**Start**".**

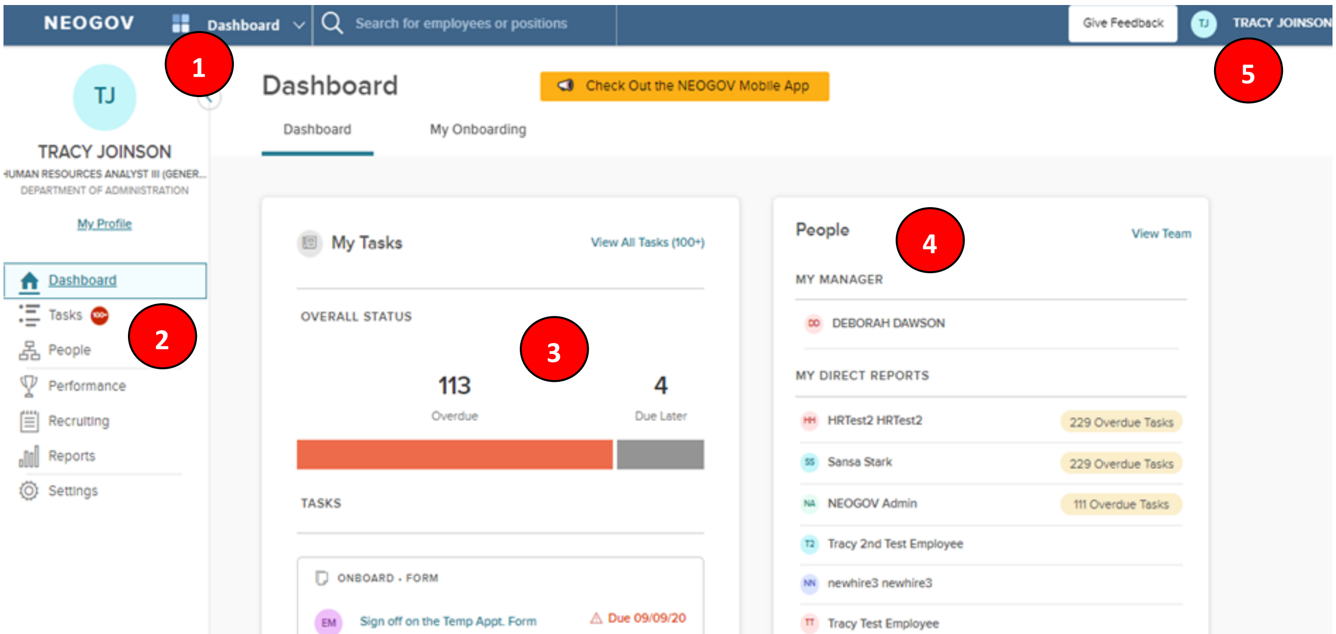



5. Click "**Continue"** on the pop-up screen.

# NEOGOV OVERVIEW

## *Navigating the Dashboard*

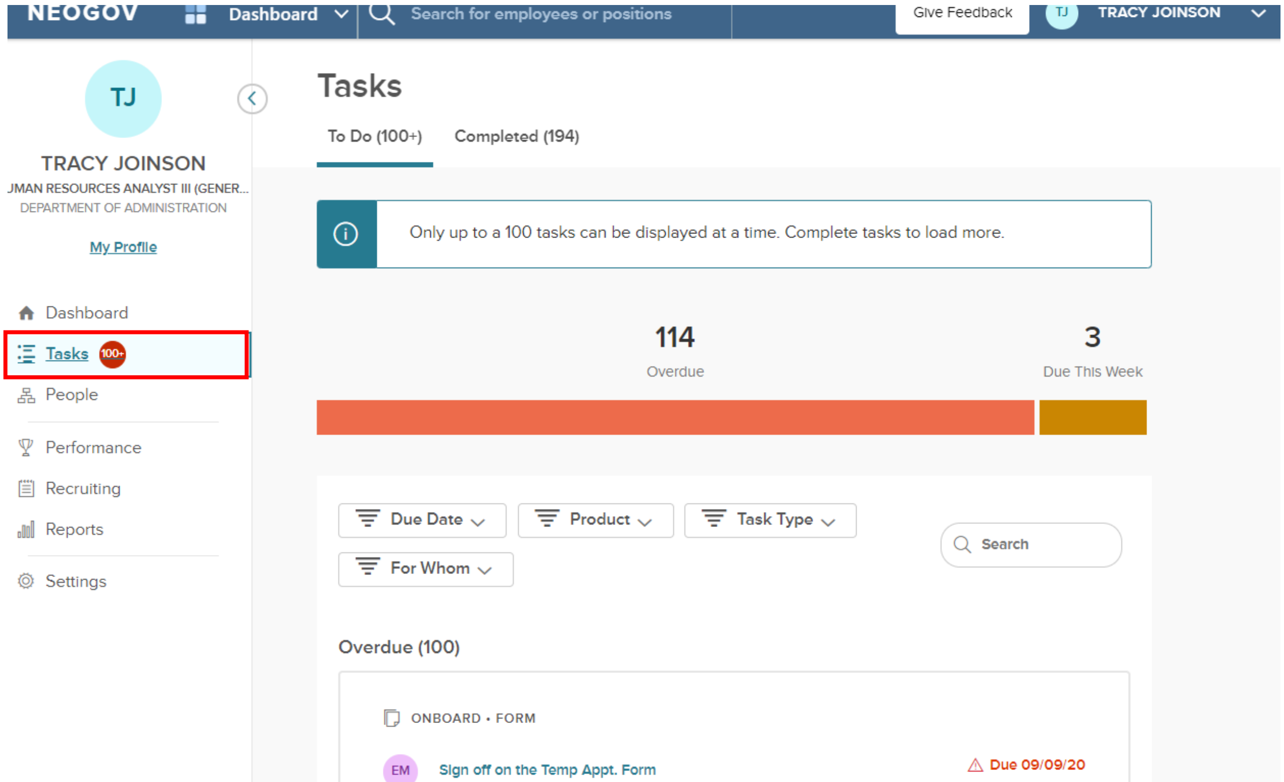
Upon logging into *NEOGOV*, you arrive at your **Dashboard.** The dashboard is a central location from which all tasks can be completed in the system.




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 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 and your supervisor.
5. **Your Name -** Access your NEOGOV profile, update your password, and sign out.

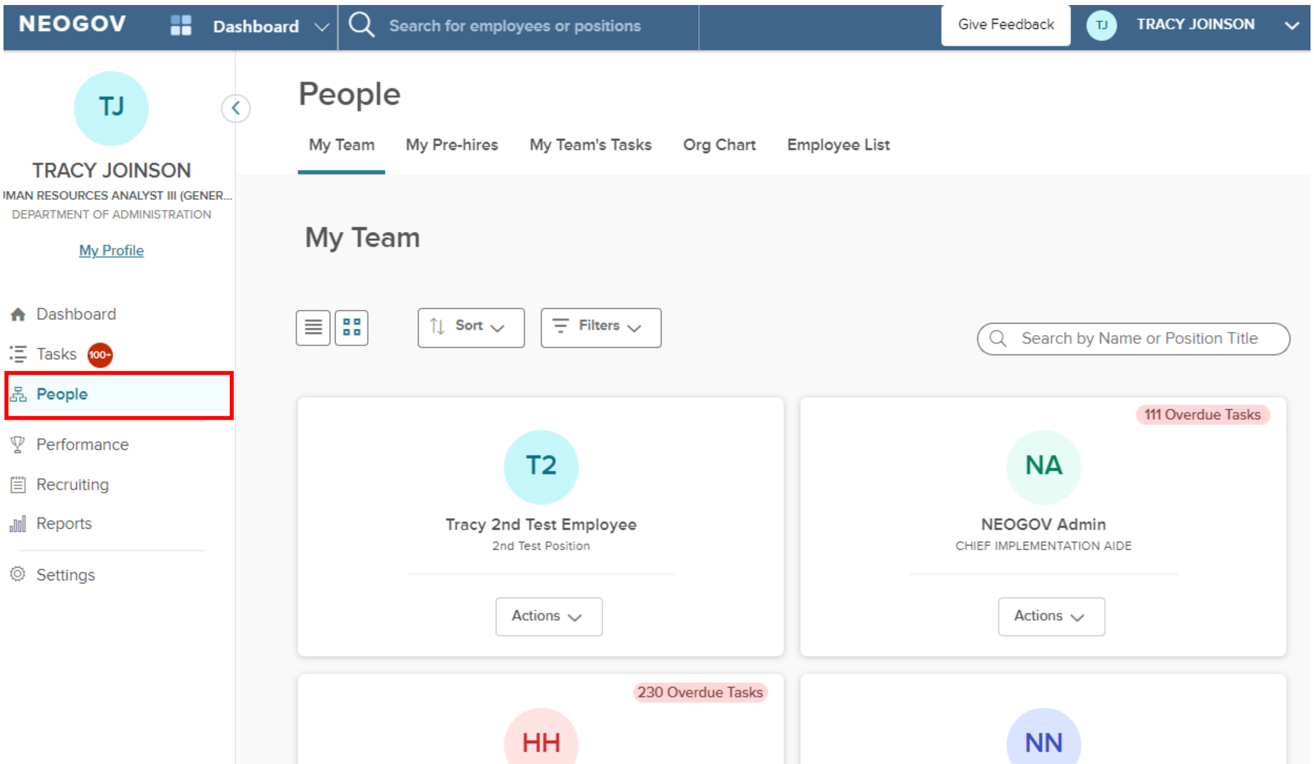
## *My Tasks*

*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.



## *People Menu*

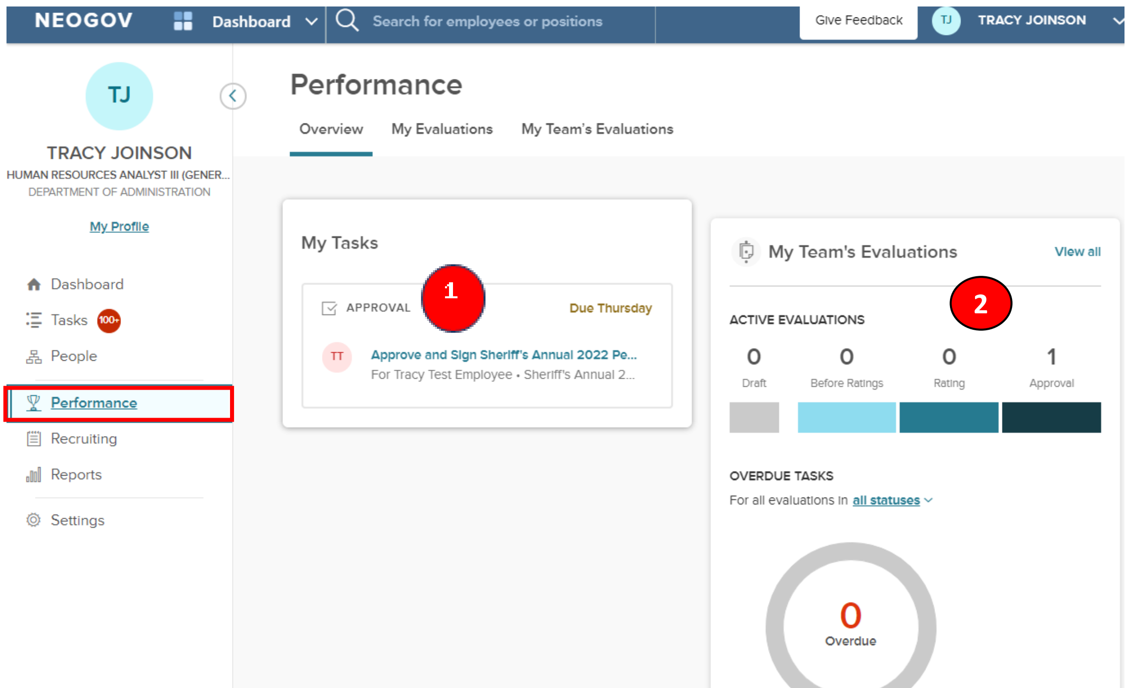
This page will display all your direct reports. You can click the name of the employee to be redirected to his/her *Talent Profile* page. Additionally, if the employee has any overdue tasks, you can click into the light red highlighted "Overdue Tasks" in his/her talent box and the list of overdue tasks 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



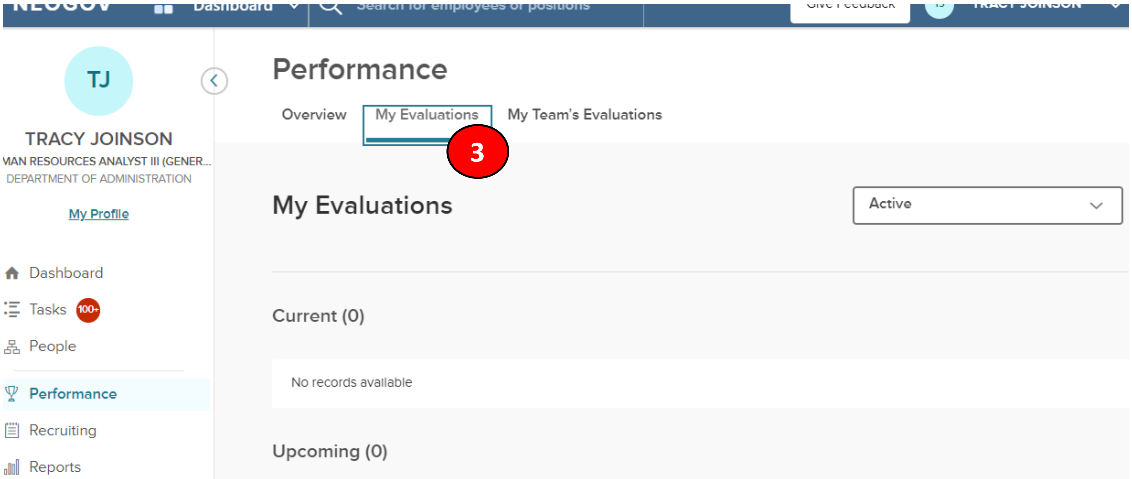
## *Performance Menu*

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

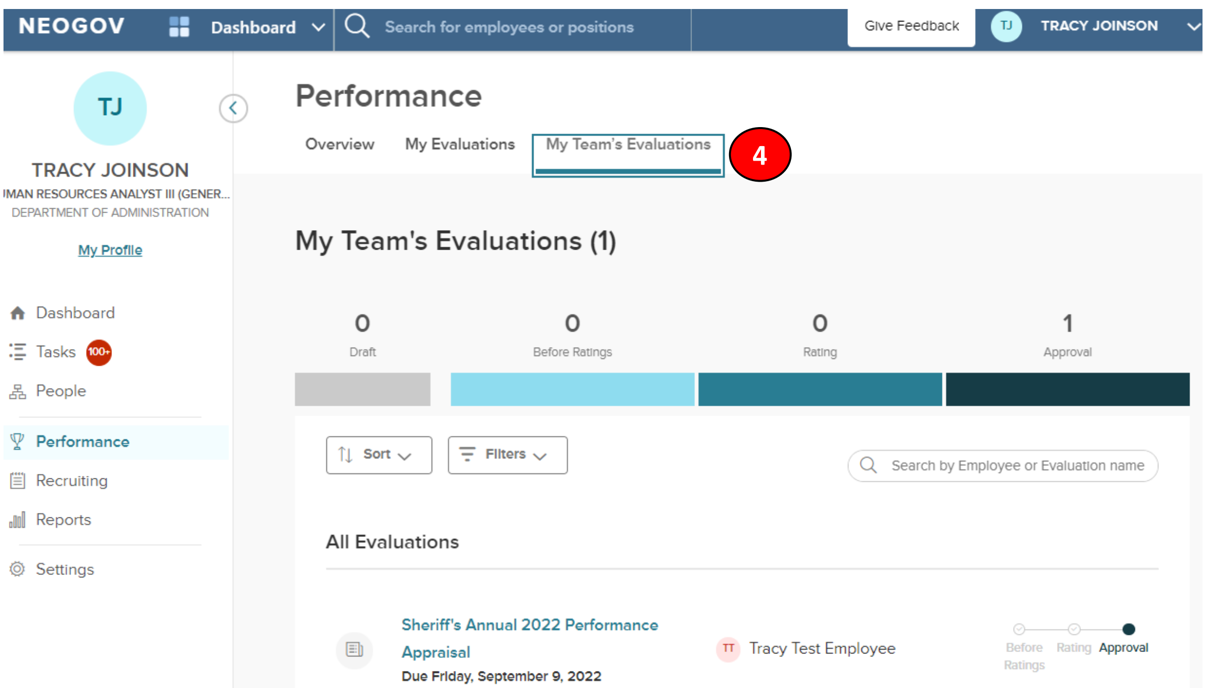
1. Any tasks related to performance development that require your action appear in "**My Tasks"**. To **complete a task**, select the task link to be re-directed to the task.
2. The **"My Team's Evaluations"** *box* provides a status grouping of all of your tasks, including any overdue tasks. You can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



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).




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.




**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.