

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>.

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.*



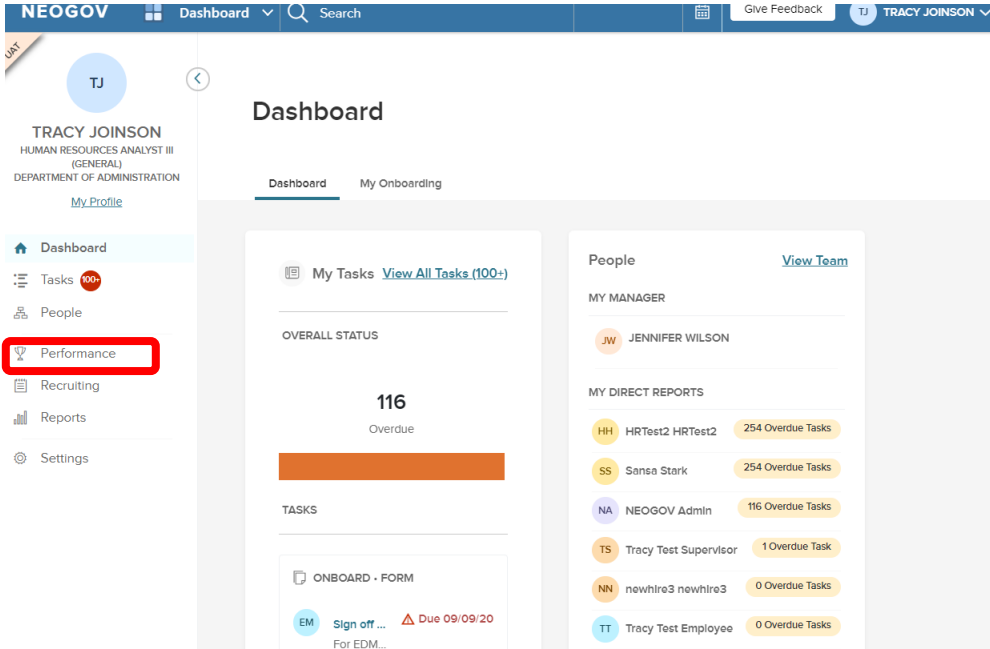
The login form features the NEOGOV logo at the top. Below it are two input fields: 'Username' and 'Password'. A note states 'All fields are required'. A blue 'Log In' button is positioned below the fields. At the bottom, there is a link for 'Forgot your username or password?'.

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.



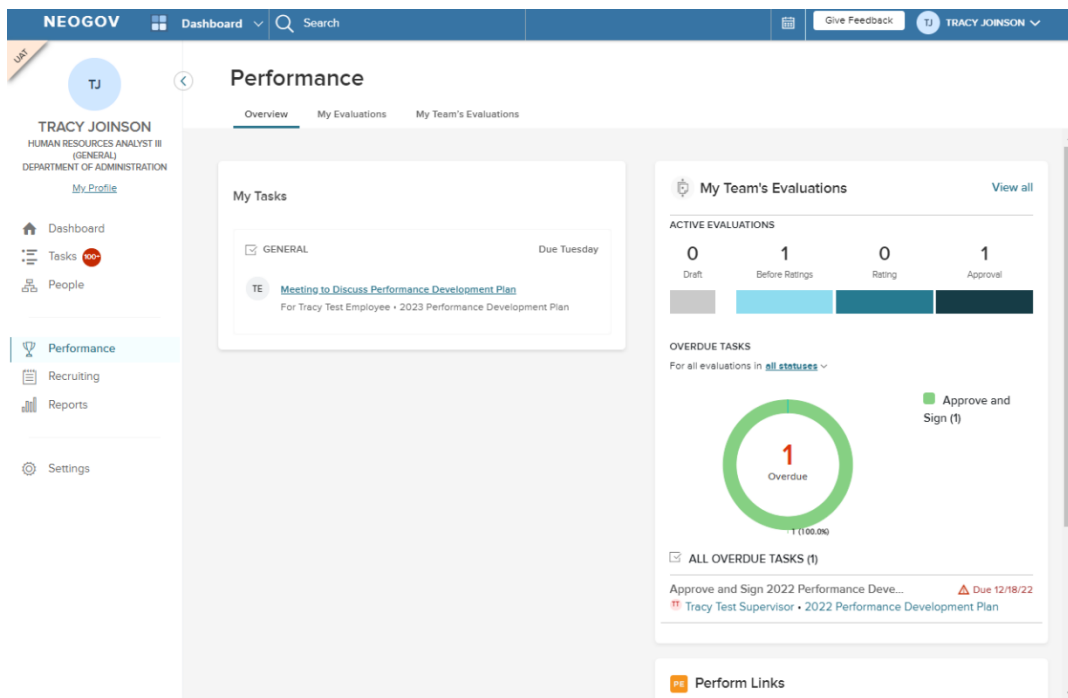
The password reset form is titled 'Password Reset'. It contains five input fields: 'Username', 'Email', 'First Name', 'Last Name', and 'What's 3 + 5?'. At the bottom, there are two buttons: 'Cancel' and 'Reset Password'.

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



The screenshot shows the NEOGOV dashboard for Tracy Joinson. The user profile on the left identifies Tracy Joinson as a Human Resources Analyst III (General) in the Department of Administration. The 'Performance' menu item in the left sidebar is highlighted with a red box. The main dashboard area shows 'My Tasks' with 100+ tasks and an 'OVERALL STATUS' of 116 Overdue tasks. A 'TASKS' section lists an 'ONBOARD - FORM' task due on 09/09/20. The 'People' section lists the user's manager, Jennifer Wilson, and their direct reports, including Sansa Stark (254 Overdue Tasks) and NEOGOV Admin (116 Overdue Tasks).

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/preselcted)

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:

The screenshot displays the NEOGOV Performance dashboard for Tracy Joinson. The top navigation bar includes the NEOGOV logo, a dashboard menu, a search bar, and a user profile for Tracy Joinson. The main content area is titled "Performance" and has tabs for Overview, My Evaluations, and My Team's Evaluations. The "My Tasks" section is visible, showing a task titled "Meeting to Discuss Performance Development Plan" for Tracy Test Employee, which is highlighted with a red rectangular box. To the right, the "My Team's Evaluations" section shows active evaluations with counts for Draft (0), Before Ratings (1), Rating (0), and Approval (1). Below this, an "OVERDUE TASKS" section shows a circular progress indicator with a red "1" and the text "Overdue" and "1 (100.0%)".

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

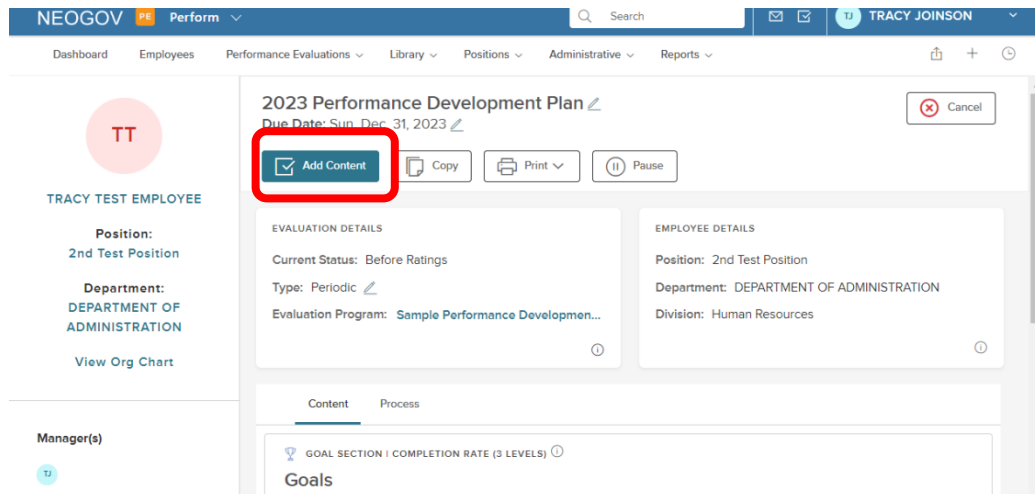
The screenshot displays the NEOGOV Performance Evaluations interface. At the top, the user is logged in as TRACY JOINSON. The main content area shows a '2023 Performance Development Plan' for 'TRACY TEST EMPLOYEE'. The plan is due on 'Sun, Dec. 31, 2023'. A red box highlights the 'Go to Task' button, which is a dark blue button with a white checkmark icon. Other buttons include 'Copy', 'Print', and 'Pause'. The interface is divided into sections: 'EVALUATION DETAILS' (Current Status: Before Ratings, Type: Periodic, Evaluation Program: Sample Performance Developmen...), 'EMPLOYEE DETAILS' (Position: 2nd Test Position, Department: DEPARTMENT OF ADMINISTRATION, Division: Human Resources), and 'Goals' (GOAL SECTION | COMPLETION RATE (3 LEVELS)). The 'Goals' section includes instructions: 'Please enter 2-4 major assignment-related goals for the next year. Remember that goals should be SMART: Specific, Measurable, Achievable, Relevant, and Timely. For example: "Purge all files that are over 3 years old and move to storage by 5/31/22."'

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**”.

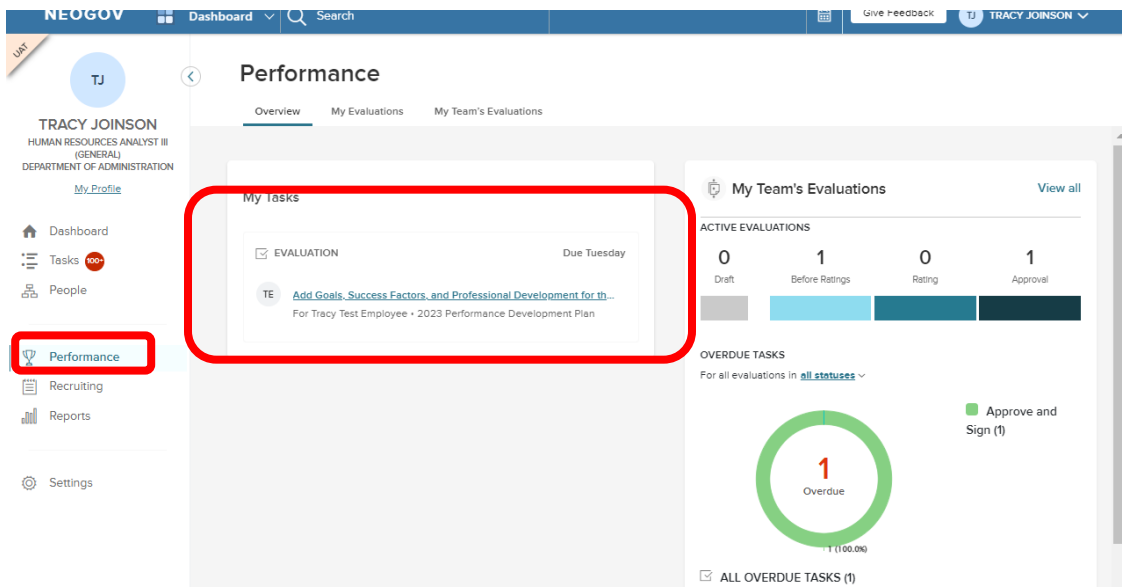
Once this is done, the task is removed from the “**Current**” task section of the dashboard and immediately replaced with the next task which is to add your direct report’s finalized goals, success factors and professional development activities to his/her performance development plan.

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:

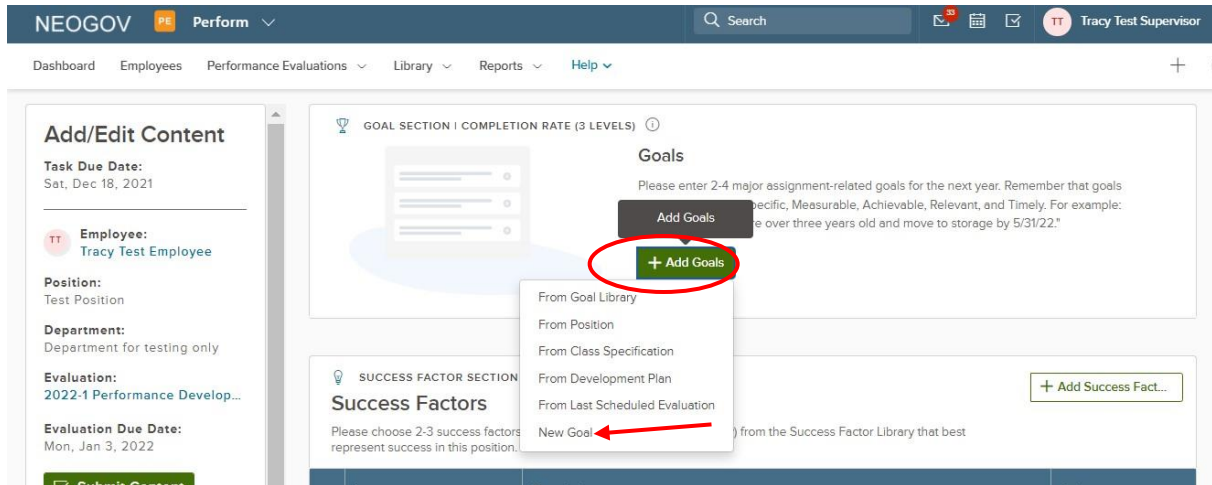


Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task (“Add Goals, Professional Development Goals, and Success Factors to the Performance Development Plan”) on your “Performance” dashboard:

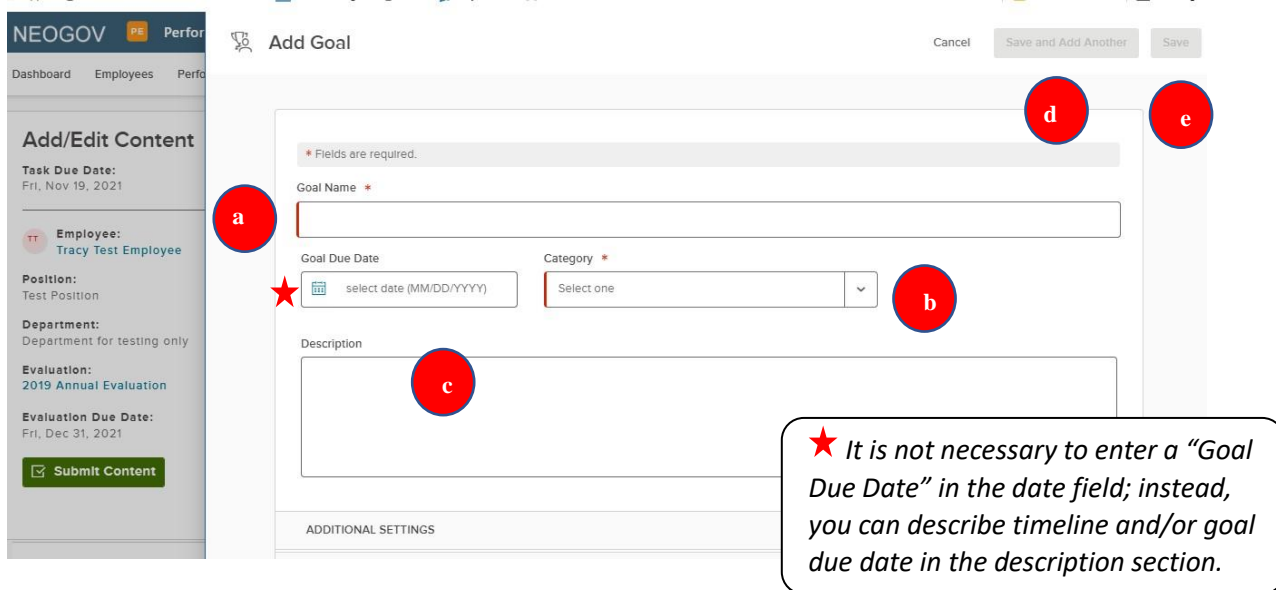


You are re-directed to the employee’s content entry page where you will see there are several sections; you must now enter the specific content into each, beginning with the “Goals” section.

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.”**

The screenshot shows the NEOGOV interface. On the left is the 'Add/Edit Content' sidebar for employee Tracy Test Employee. The main area is divided into 'Goals' and 'Success Factors' sections. A dropdown menu is open over the 'Success Factors' section, showing options: 'From Success Factor Library', 'From Position', 'From Class Specification', 'From Development Plan', and 'New Success Factor'. The 'From Success Factor Library' option is highlighted with a red box.

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

The screenshot shows the 'Add Items' page in the Success Factor Library. A table lists six success factors, each with a checkbox. The checkboxes for 'Communication Skills', 'Customer Service', 'Leadership Skills', 'Supervision', 'Teamwork and Cooperation', and 'Technical/Subject Matter Knowledge' are circled in red.

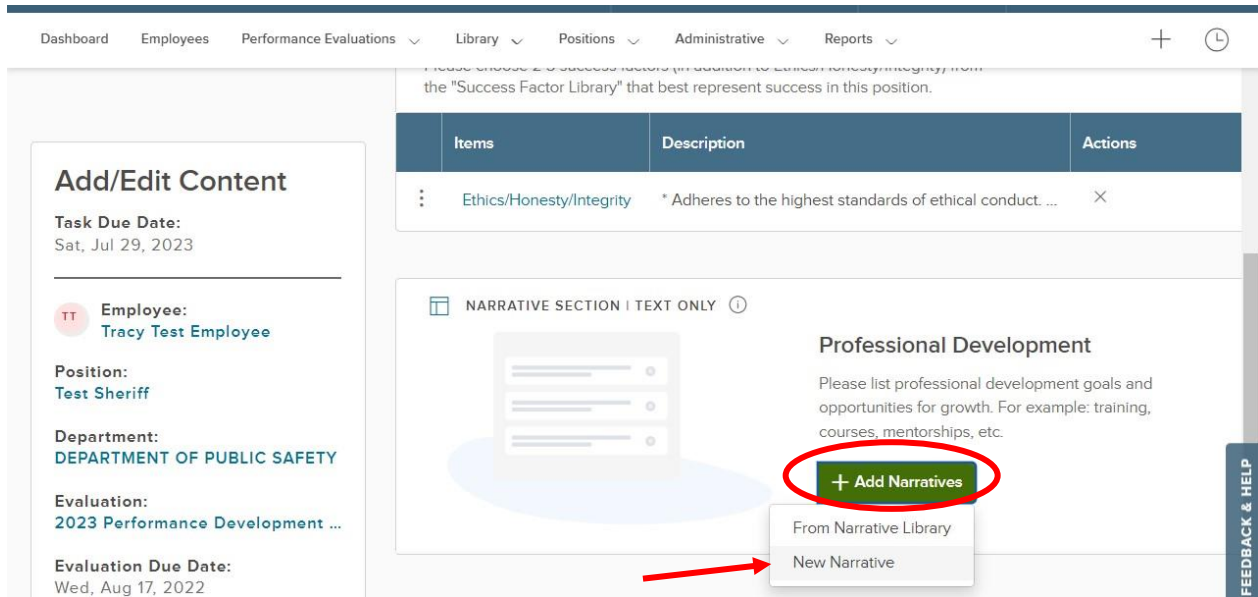
<input type="checkbox"/>	Name	Category	Description
<input type="checkbox"/>	Communication Skills	Success Factors	* Is clear and credible in oral presentations to diverse audiences * Listens effectively an...
<input type="checkbox"/>	Customer Service	Success Factors	* Anticipates and meets the needs of internal and external customers * Identifies and re...
<input type="checkbox"/>	Leadership Skills	Success Factors	* Leads and inspires coworkers to accomplish goals * Fosters an inclusive workplace w...
<input type="checkbox"/>	Supervision	Success Factors	* Clearly and comfortably delegates both routine and exceptional tasks and decisions * ...
<input type="checkbox"/>	Teamwork and Cooperation	Success Factors	* Works well with others and encourages collaboration * Can represent his/her own inte...
<input type="checkbox"/>	Technical/Subject Matter Knowledge	Success Factors	* Possession of a designated level of technical skill or knowledge in a specific technical...

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.

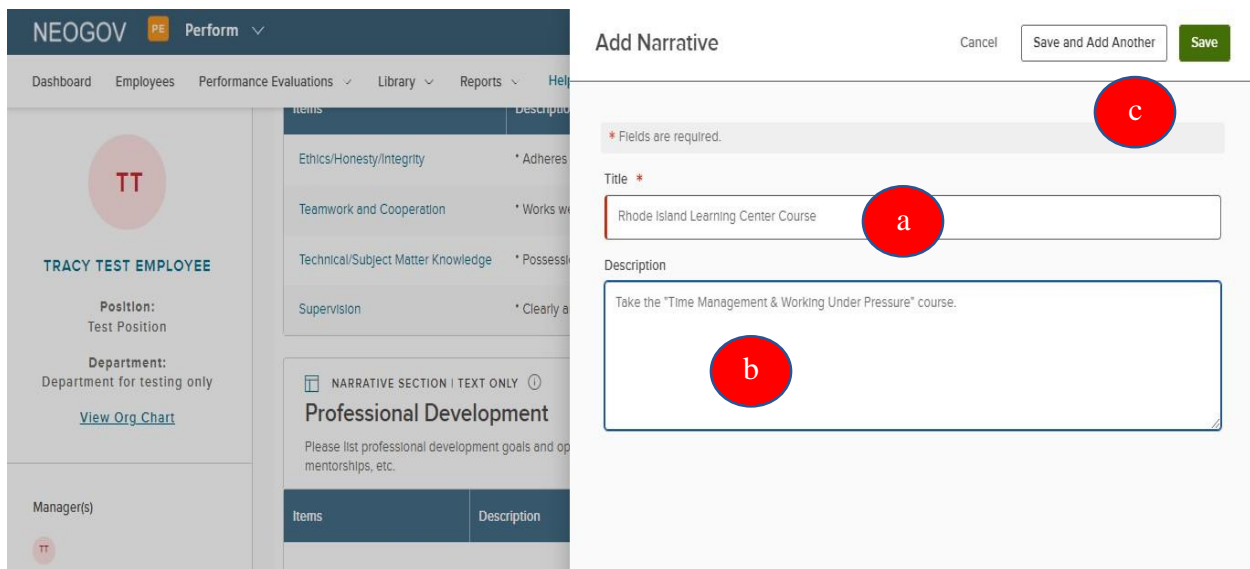
4. Adding Professional Development Activities

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.

The screenshot shows the NEOGOV Perform interface. The top navigation bar includes 'NEOGOV', 'PE Perform', a search bar, and a user profile for 'Tracy Test Supervisor'. The main content area is divided into two sections: 'Professional Development' and 'Achievements and Opportunities for Growth'. The 'Professional Development' section has a table with columns 'Items', 'Description', and 'Actions'. It lists 'Rhode Island Learning Center Course' and 'Take CPA Exam'. The 'Achievements and Opportunities for Growth' section is crossed out with a red diagonal line. It also has a table with columns 'Items', 'Description', and 'Actions', with one entry 'Achievements and Opportunities for Gro...'. A sidebar on the left shows the user's profile as 'TRACY TEST EMPLOYEE' with position 'Test Position' and department 'Department for testing only'.

- 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.

The screenshot shows the 'Add Notes & Attachments (11)' section in the NEOGOV Perform interface. The top navigation bar includes 'NEOGOV', 'Dashboard', a search bar, and a user profile for 'Tracy Test Employee'. The main content area shows a table with columns 'Note/Attachment', 'Created By', 'Show On Ratin...', and 'Actions'. The table lists 11 attachments, all created by 'TRACY JOINS...'. The sidebar on the left shows the user's profile as 'TRACY TEST EMPLOYEE' with position '2nd Test Position' and department 'DEPARTMENT OF ADMINISTRATIVE SERVICES'.

Note/Attachment	Created By	Show On Ratin...	Actions
[PD Process-Flowchart.pdf]	TRACY JOINS...	Yes	
[The Performance Development Process -Checklist 2022.pt]	TRACY JOINS...	Yes	
[NEOGOV Perform - Supervisor User Guide 2022.pdf]	TRACY JOINS...	Yes	
[NEOGOV Perform - Employee User Guide 2022.pdf]	TRACY JOINS...	Yes	
[Supervisor ActivatingAndGoal Setting2022 6 min 22 sec.p]	TRACY JOINS...	Yes	
[Supervisor Interim Check-In2022 3 min 10 sec.pptx]	TRACY JOINS...	Yes	
[Supervisor Final Review2022 5 min 19 sec.pptx]	TRACY JOINS...	Yes	
[Supervisor Editing a Perf Development Plan 2022 5 min 01]	TRACY JOINS...	Yes	
[Employee Goal Setting 2 min 52 sec.pptx]	TRACY JOINS...	Yes	
[Employee Interim Check-In 2 min 42 sec.pptx]	TRACY JOINS...	Yes	
[Employee Self-Rating and Final Review 7 min 37 sec.pptx]	TRACY JOINS...	Yes	

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.

Dashboard Employees Performance Evaluations Library Positions Administrative Reports Help

Add/Edit Content

Task Due Date:
Sat, Dec 18, 2021

Employee:
HRTest2 HRTest2

Position:
2nd Test Position

Department:
DEPARTMENT OF ADMINISTR...

Evaluation:
Right Now Test

Evaluation Due Date:
Wed, Dec 29, 2021

Submit Content

GOALS SECTION | COMPLETION RATE (3 LEVELS)

Goals + Add Goals

Please enter 2-4 major assignment-related goals for the next year. Remember that goals should be SMART: Specific, Measurable, Achievable, Relevant, and Timely. For example: "Purge all files that are over three years old and move to storage by 5/31/22."

Items	Description	Actions
:	Reduce Wait Time by.....	

SUCCESS FACTOR SECTION | EXPECTATIONS (3 LEVELS)

Success Factors + Add Success Fact...

Please choose 2-3 success factors (in addition to Ethics/Honesty/Integrity) from the Success Factor Library that best represent success in this position.

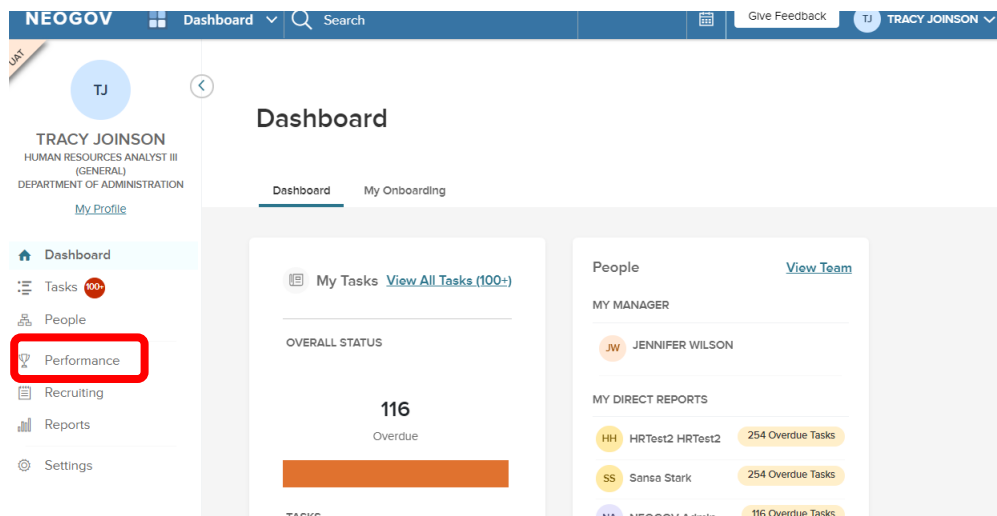
Items	Description	Actions
-------	-------------	---------

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.

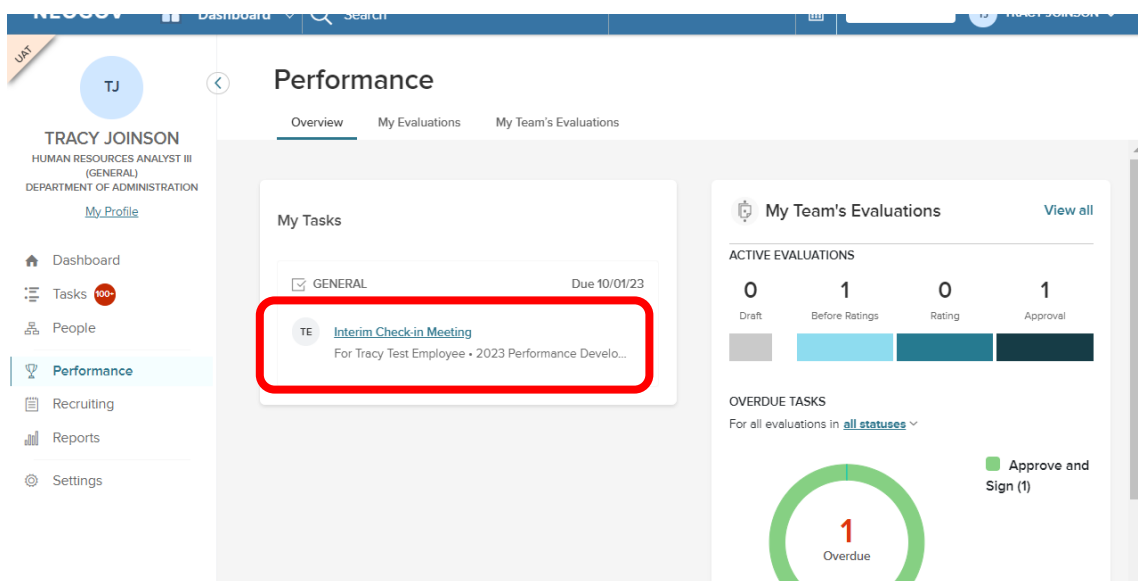
QUICK GUIDE - COMPLETING AN INTERIM CHECK-IN FOR YOUR DIRECT REPORTS

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, you will need to (1) acknowledge the meeting in NEOGOV and then (2) complete the check-in form.

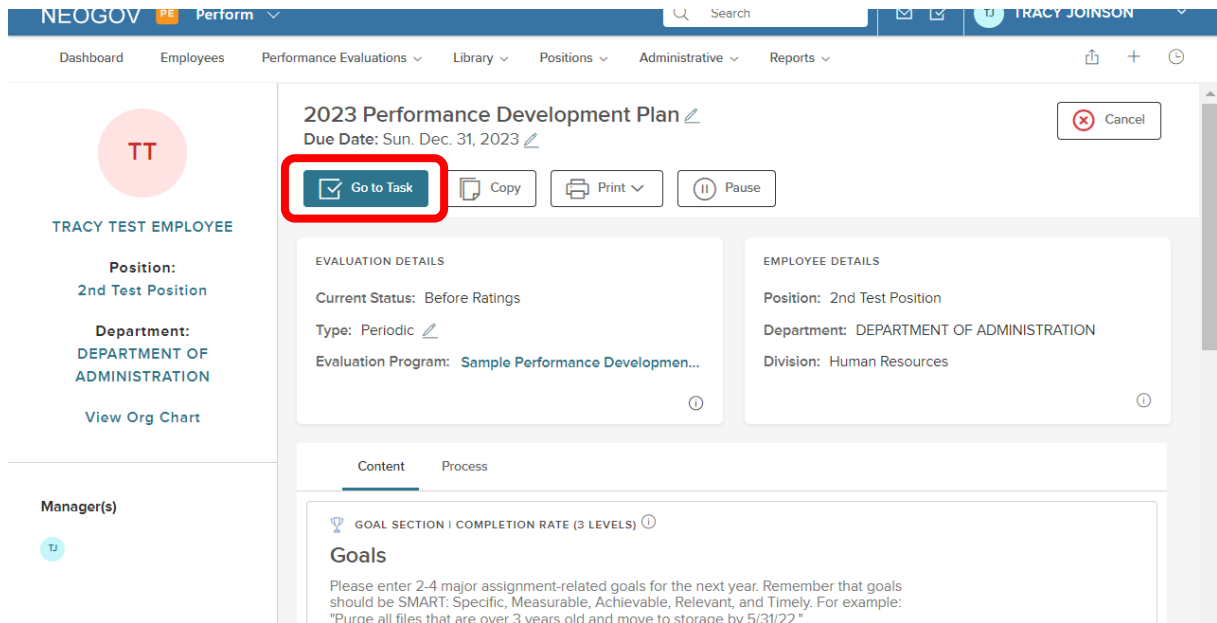
1. Once you have met, to mark the meeting task as completed, log-in to NeoGov and select **"Performance"** on the left menu:



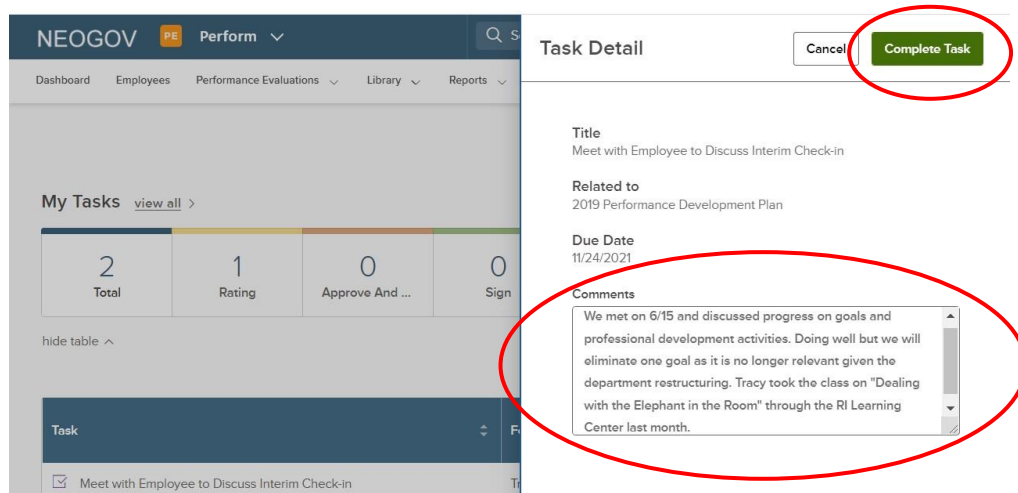
2. then **"Meet with Employee to Discuss Interim Check-in"** from the **"My Tasks"** section:



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”

Dashboard Employees Performance Evaluations Library Positions Administrative Reports

2023 Performance Development Plan
Due Date: Sun, Dec. 31, 2023

Check-In Copy Print Pause

TRACY TEST EMPLOYEE
Position: 2nd Test Position
Department: DEPARTMENT OF ADMINISTRATION
View Org Chart

Manager(s)
TJ

EVALUATION DETAILS
Current Status: Before Ratings
Type: Periodic
Evaluation Program: Sample Performance Developmen...

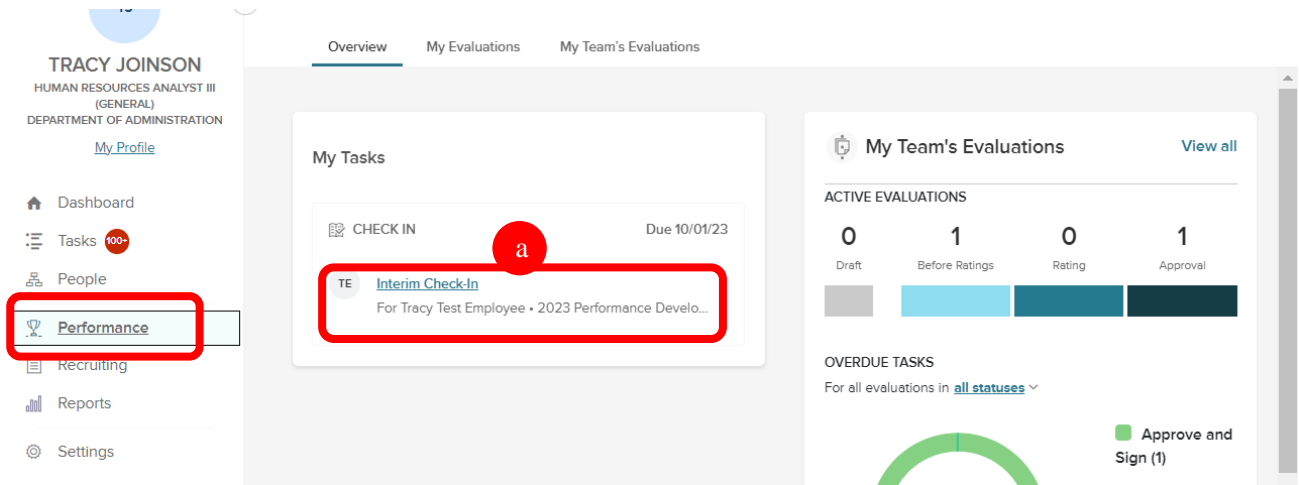
EMPLOYEE DETAILS
Position: 2nd Test Position
Department: DEPARTMENT OF ADMINISTRATION
Division: Human Resources

Content Process

GOAL SECTION 1 COMPLETION RATE (3 LEVELS)
Goals
Please enter 2-4 major assignment-related goals for the next year. Remember that goals should be SMART: Specific, Measurable, Achievable, Relevant, and Timely. For example:

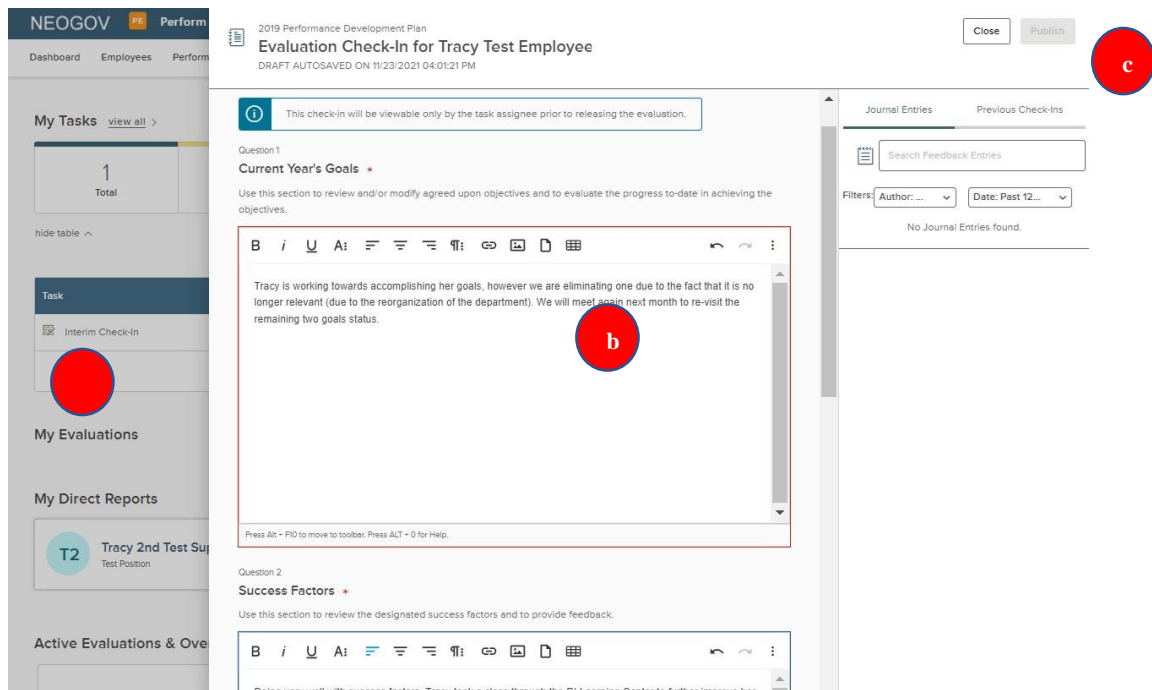
Alternatively, if you acknowledged the meeting previously and are returning to NeoGov, you will see the task (“**Interim Check-In**”) on your “**Performance**” dashboard.

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.

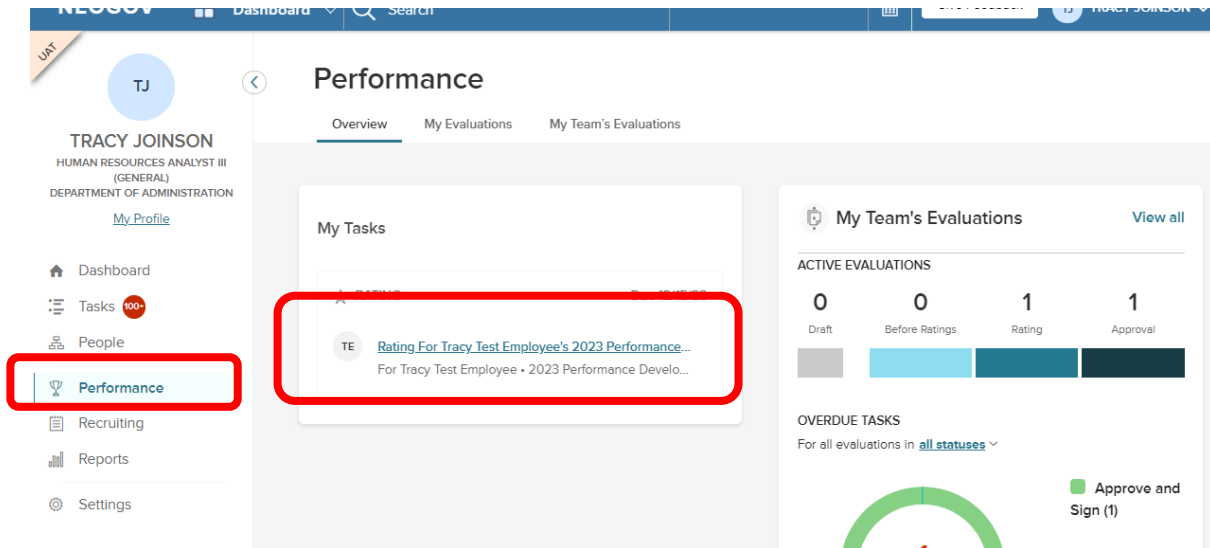


You should alert your direct report(s) that you have completed the interim check-in form so s/he now needs to do the same.

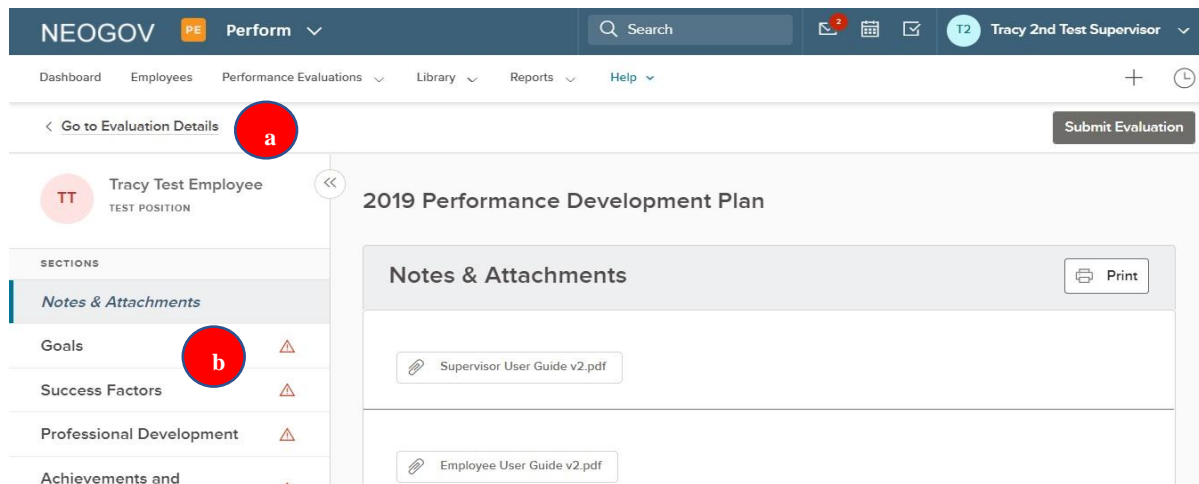
QUICK GUIDE - FINAL REVIEW AND FUTURE GOAL SETTING

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.

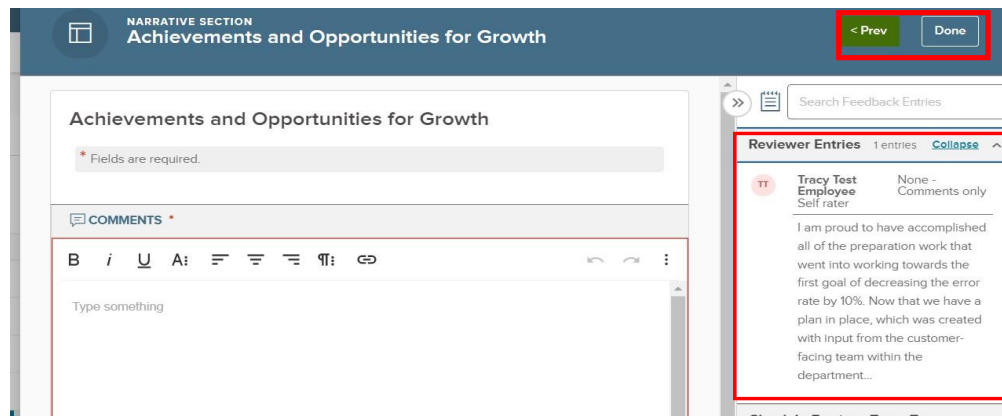


3. To rate an item, select the (a) section name and then (b) an item *within* a section.

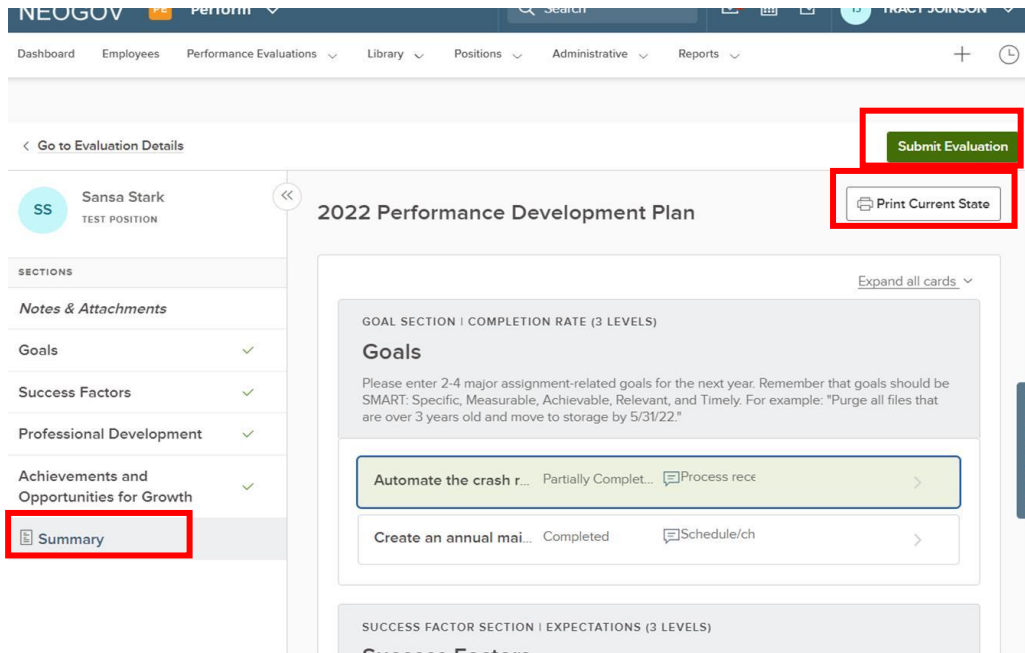
4. Upon selecting the item name to be rated, the rating card fly-out appears.

- You see a **Rating Scale**; to view a description of each rating value, select the “**Show descriptions**” link and an informational flyout appears.
- 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).

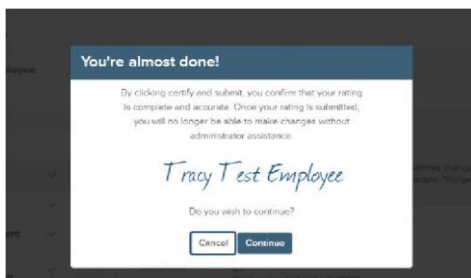
- c. Select your rating and type any text into the **Comments** box as desired. If a comment is required, the box is highlighted in red. While rating, the system auto saves all progress made. If needed, you may exit out of the rating card and resume rating at a later time.
 - d. To move to the next rating 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”**



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



- After submitting, you will get a confirmation message. Once the review is submitted changes can no longer be made without the assistance of HR. **If further changes are needed, click “Cancel”.** Otherwise, select **“Continue”**.



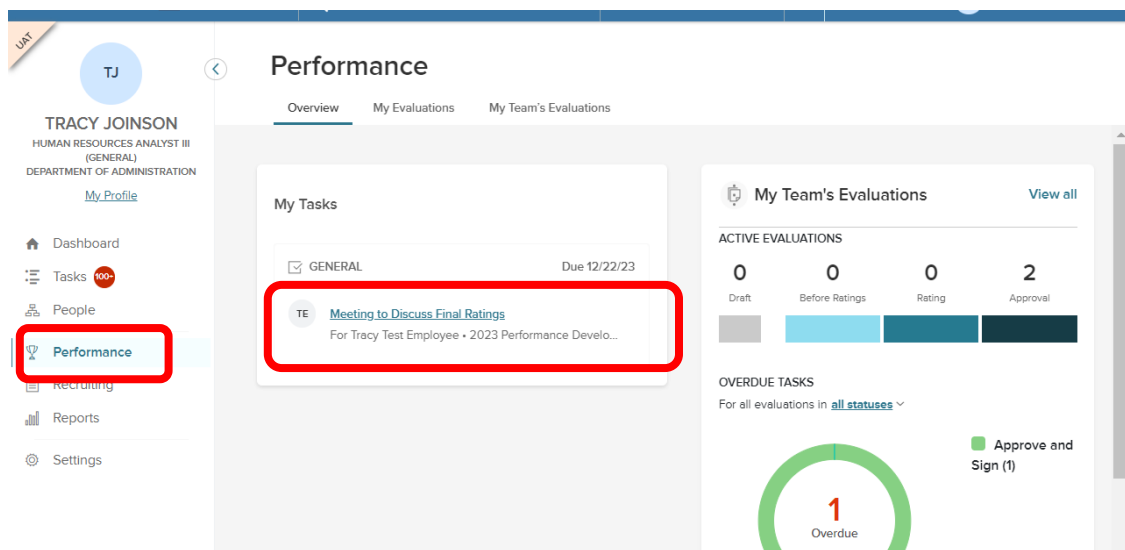
At this point, you will reach out to your direct report to schedule a review meeting to discuss your respective ratings. DO NOT UTILIZE THE “Go to Task” immediately after completing your rating as you have not held the meeting yet- which is the next task/step in the process.

Final Review and Future Goal Setting Meeting

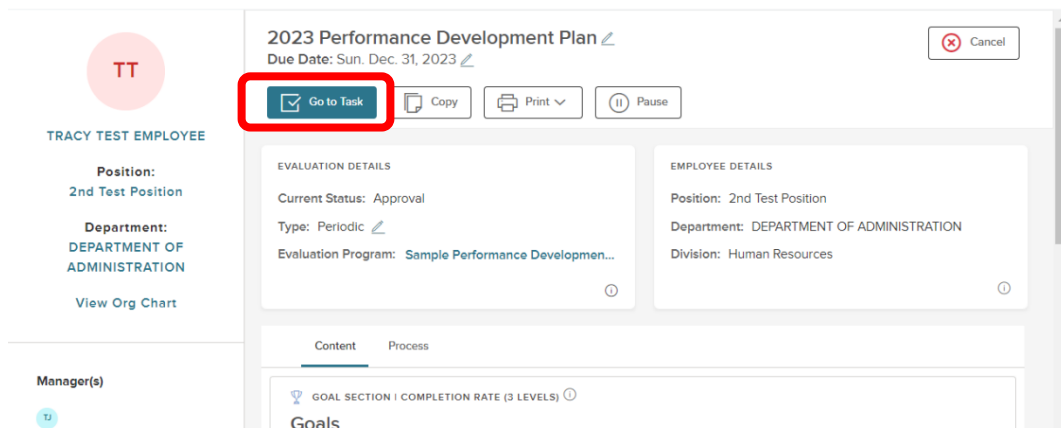
This meeting allows the supervisor and employee to discuss the similarities and differences, if any, in their respective ratings. During this meeting, you can also discuss the upcoming year's goals, success factors, and professional development activities.

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”:

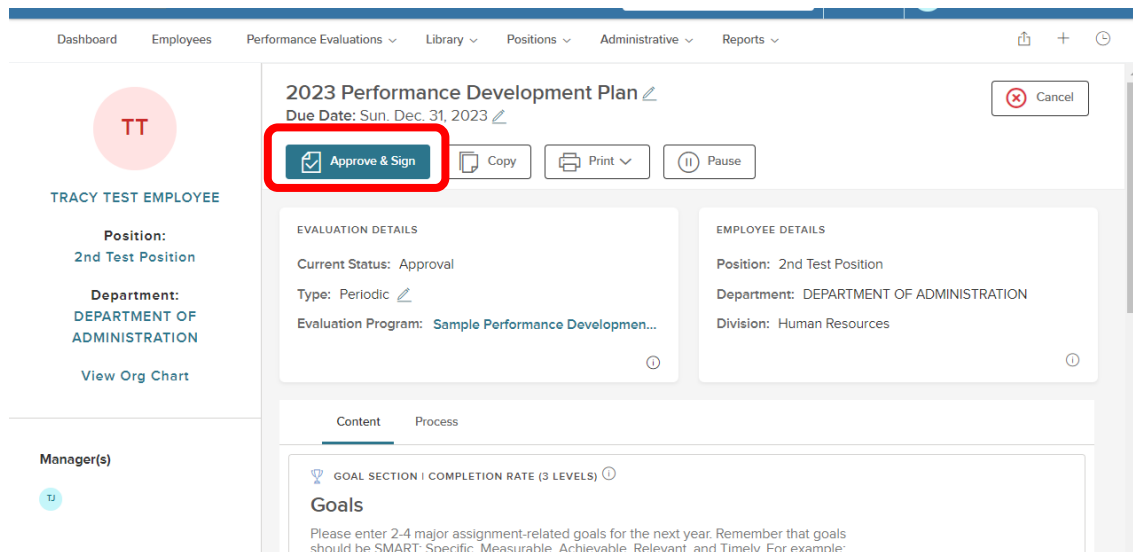


3. A fly-out will appear. Add any comments as desired.
4. Click “**Complete Task**”.

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.**

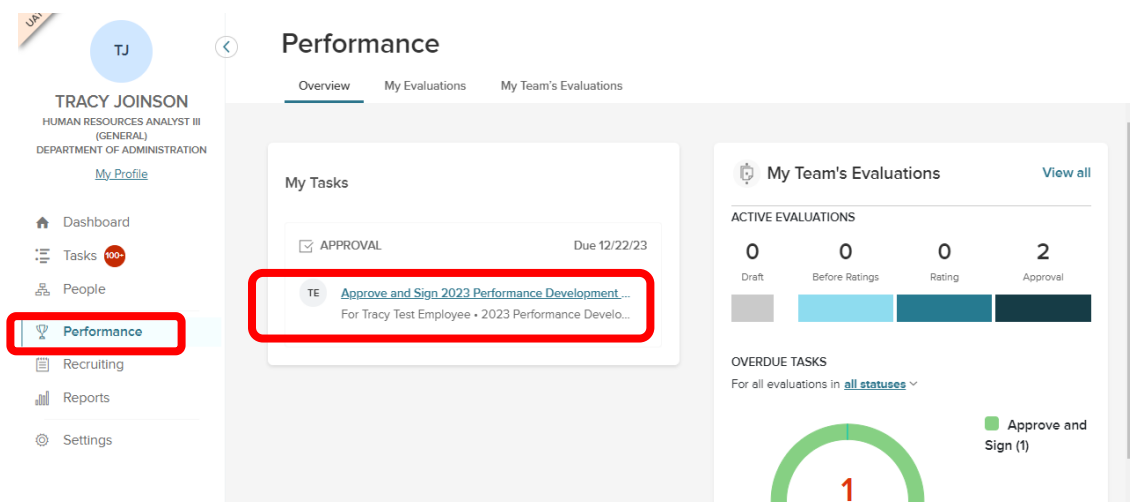
There are two possible methods to get to this task; first, if you are doing so *immediately* after acknowledging the meeting, you will see the “Approve & Sign” box from within the employee’s performance development plan:



The screenshot shows the '2023 Performance Development Plan' for Tracy Test Employee. The 'Approve & Sign' button is highlighted with a red box. The plan details include:

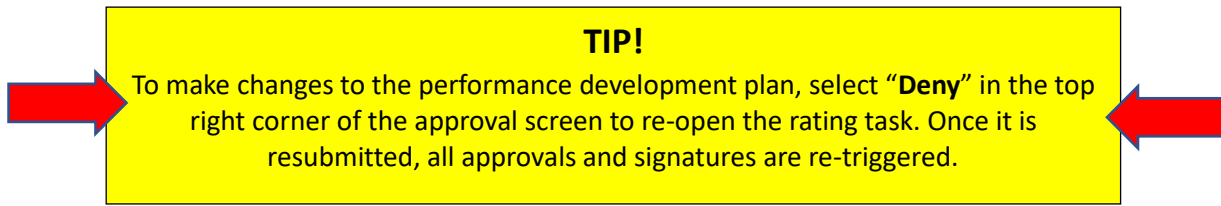
- Position:** 2nd Test Position
- Department:** DEPARTMENT OF ADMINISTRATION
- Current Status:** Approval
- Type:** Periodic
- Evaluation Program:** Sample Performance Development...
- Employee Details:** Position: 2nd Test Position, Department: DEPARTMENT OF ADMINISTRATION, Division: Human Resources

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



The screenshot shows the 'Performance' dashboard for Tracy Joinson. The 'Approve and Sign 2023 Performance Development...' task is highlighted with a red box. The dashboard includes:

- My Tasks:** APPROVAL Due 12/22/23
- My Team's Evaluations:** ACTIVE EVALUATIONS: Draft (0), Before Ratings (0), Rating (0), Approval (2)
- OVERDUE TASKS:** 1 task (Approve and Sign (1))



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.

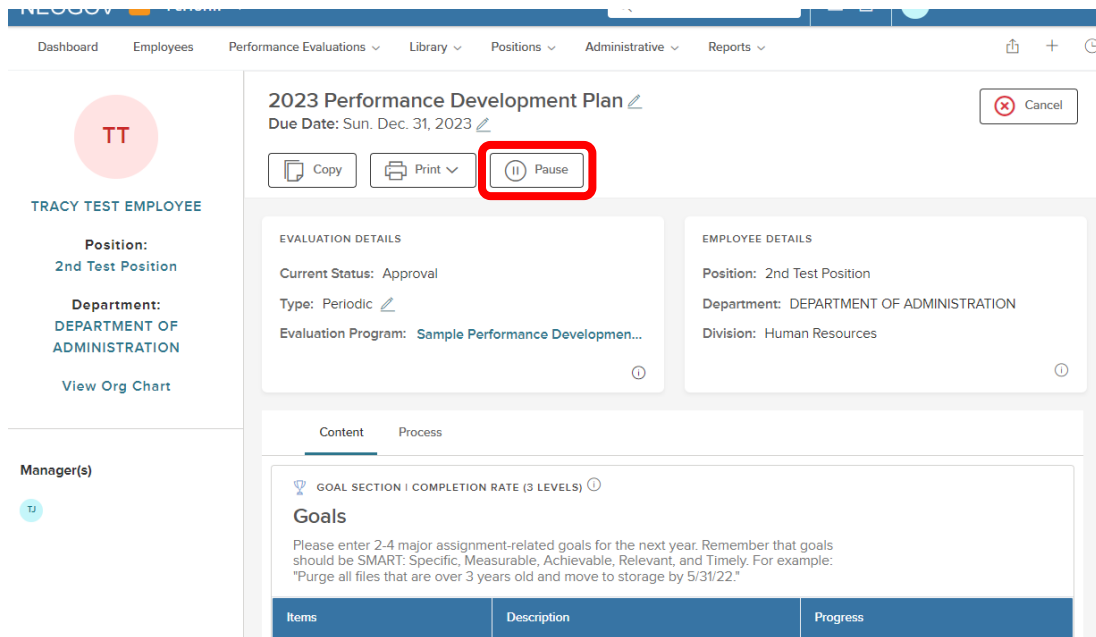
QUICK GUIDE - EDITING A PERFORMANCE DEVELOPMENT PLAN

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.

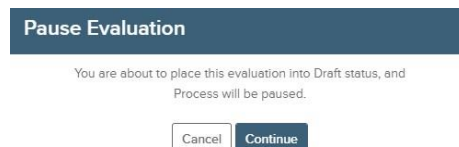
1. To do so, navigate to your **Performance** dashboard and click on the employee’s *current* performance development plan under “**My Team’s Evaluations**”.

The screenshot displays the NEOGOV Performance dashboard for Tracy Joinson. The top navigation bar includes the NEOGOV logo, a search bar, and a user profile for Tracy Joinson. The left sidebar contains navigation options: Dashboard, Tasks (with a red notification badge), People, Performance (highlighted with a red box), Recruiting, Reports, and Settings. The main content area is titled 'Performance' and has tabs for 'Overview', 'My Evaluations', and 'My Team's Evaluations' (the latter is highlighted with a red box). Below the tabs, a progress bar shows the status of evaluations: 0 Draft, 0 Before Ratings, 0 Rating, and 2 Approval. The 'All Evaluations' section lists two performance development plans for 'Tracy Test Employee': a 2022 plan due on December 20, 2022, and a 2023 plan due on December 31, 2023 (the 2023 plan is highlighted with a red box). Each plan entry includes a progress indicator for 'Before Ratings', 'Rating', and 'Approval'.

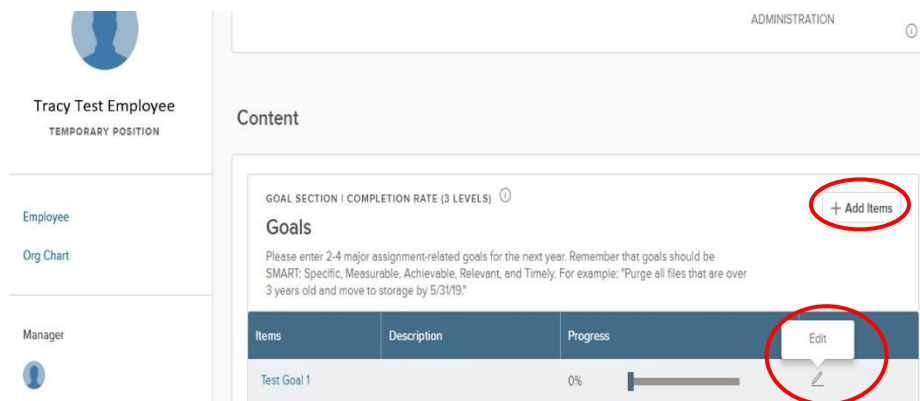
2. To edit the performance development plan, you will need to put it into a **Draft** status. To do so, click **“Pause”**.



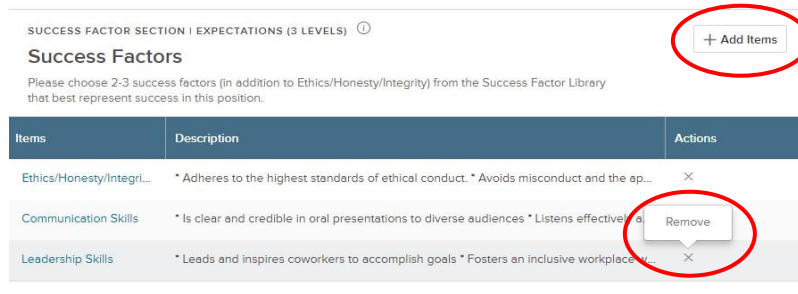
2. Click **“Continue”** on the pop-up screen:




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”**.



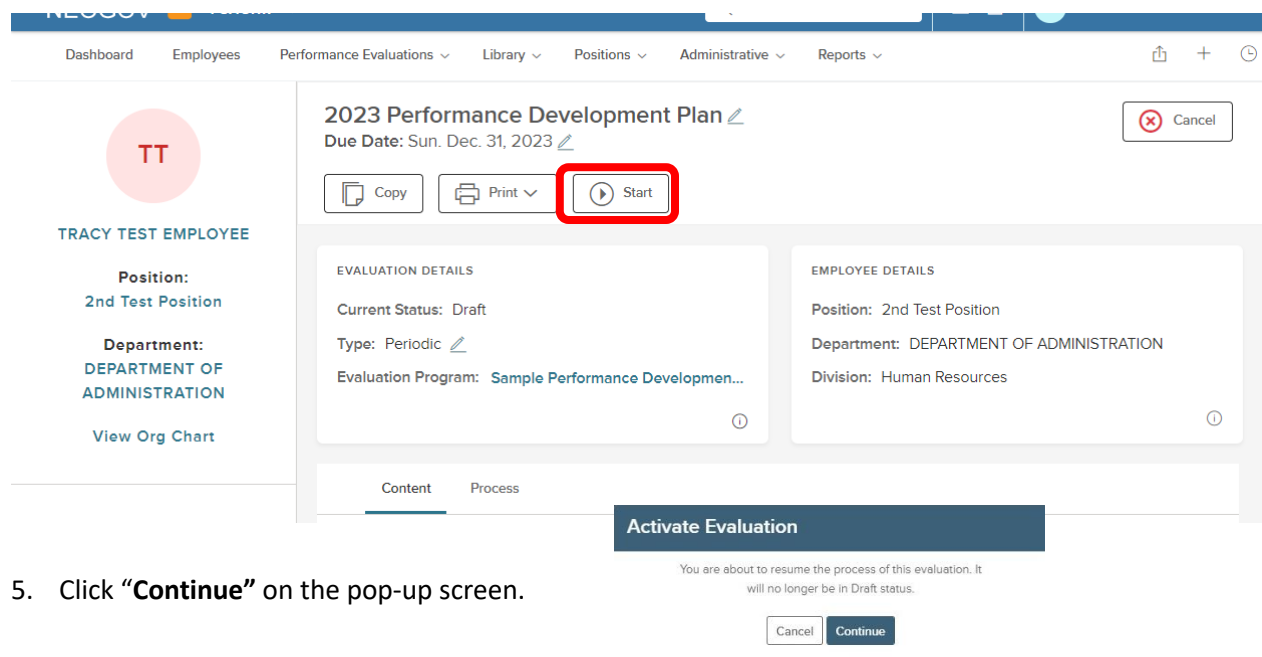
- To add Success Factors, select “+Success Factors”, “From Success Factor Library”. To remove, click on the “X” to the right of the success factor. **NOTE: Ethics/Honesty/Integrity is required for all employees. You may not remove that success factor from any employee’s evaluation.**



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



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



- 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.

The screenshot shows the NEOGOV Dashboard interface. At the top, there is a navigation bar with the NEOGOV logo, a 'Dashboard' dropdown menu (callout 1), a search bar, and a 'Give Feedback' button. The user's name 'TRACY JOINSON' is displayed in the top right corner (callout 5). Below the navigation bar, the dashboard is divided into several sections. On the left, there is a 'My Profile' section for Tracy Joinson, Human Resources Analyst III, and a 'Dashboard Menu' (callout 2) with options for Dashboard, Tasks, People, Performance, Recruiting, Reports, and Settings. The main content area is titled 'Dashboard' and 'My Onboarding'. It features a 'My Tasks' section (callout 3) with an 'OVERALL STATUS' bar showing 113 Overdue tasks and 4 Due Later tasks. Below this, there is a 'TASKS' section with a task titled 'ONBOARD - FORM' and a sub-task 'Sign off on the Temp Appt. Form' due on 09/09/20. To the right, there is a 'People' section (callout 4) showing 'MY MANAGER' as Deborah Dawson and 'MY DIRECT REPORTS' including HRTest2 HRTest2, Sansa Stark, NEOGOV Admin, Tracy 2nd Test Employee, newhire3 newhire3, and Tracy Test Employee. A 'Check Out the NEOGOV Mobile App' button is located at the top right of the dashboard area.

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.

The screenshot shows the NEOGOV user interface for Tracy Joinson. The top navigation bar includes the NEOGOV logo, a 'Dashboard' dropdown, a search bar for employees or positions, a 'Give Feedback' button, and the user's name 'TRACY JOINSON' with a dropdown arrow. The left sidebar contains navigation options: 'Dashboard', 'Tasks' (highlighted with a red box 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 box states: 'Only up to a 100 tasks can be displayed at a time. Complete tasks to load more.' Below this, a progress bar shows 114 overdue tasks (orange) and 3 tasks due this week (yellow). Filter buttons for 'Due Date', 'Product', 'Task Type', and 'For Whom' are present, along with a search box. The 'Overdue (100)' section lists a task: 'ONBOARD - FORM' with a sub-task 'EM Sign off on the Temp Appt. Form' and a due date of '09/09/20'.

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

The screenshot shows the NEOGOV user interface. At the top, there is a navigation bar with the NEOGOV logo, a 'Dashboard' dropdown, a search bar for employees or positions, a 'Give Feedback' button, and a user profile for TRACY JOINSON. On the left side, a sidebar menu lists various options: Dashboard, Tasks (with a 100+ notification), People (highlighted with a red box), Performance, Recruiting, Reports, and Settings. The main content area is titled 'People' and includes sub-tabs for 'My Team', 'My Pre-hires', 'My Team's Tasks', 'Org Chart', and 'Employee List'. The 'My Team' tab is active, displaying a grid of employee cards. Each card shows an employee's initials in a colored circle, their name, position, and a red 'Overdue Tasks' notification. The first card is for 'T2', Tracy 2nd Test Employee, with 111 overdue tasks. The second card is for 'NA', NEOGOV Admin, Chief Implementation Aide, with 230 overdue tasks. The third card is for 'HH' and the fourth for 'NN'. Each card has an 'Actions' dropdown menu.

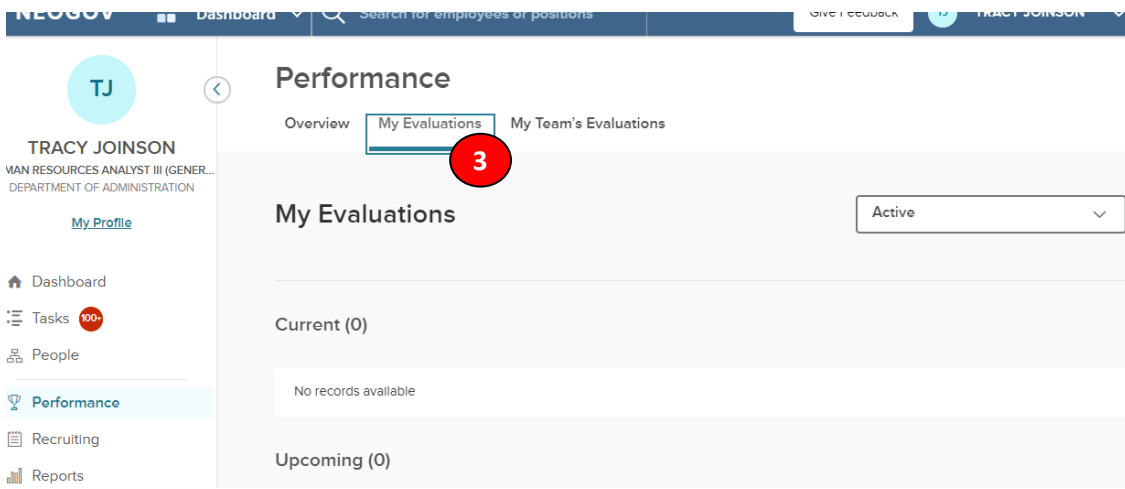
Performance Menu

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

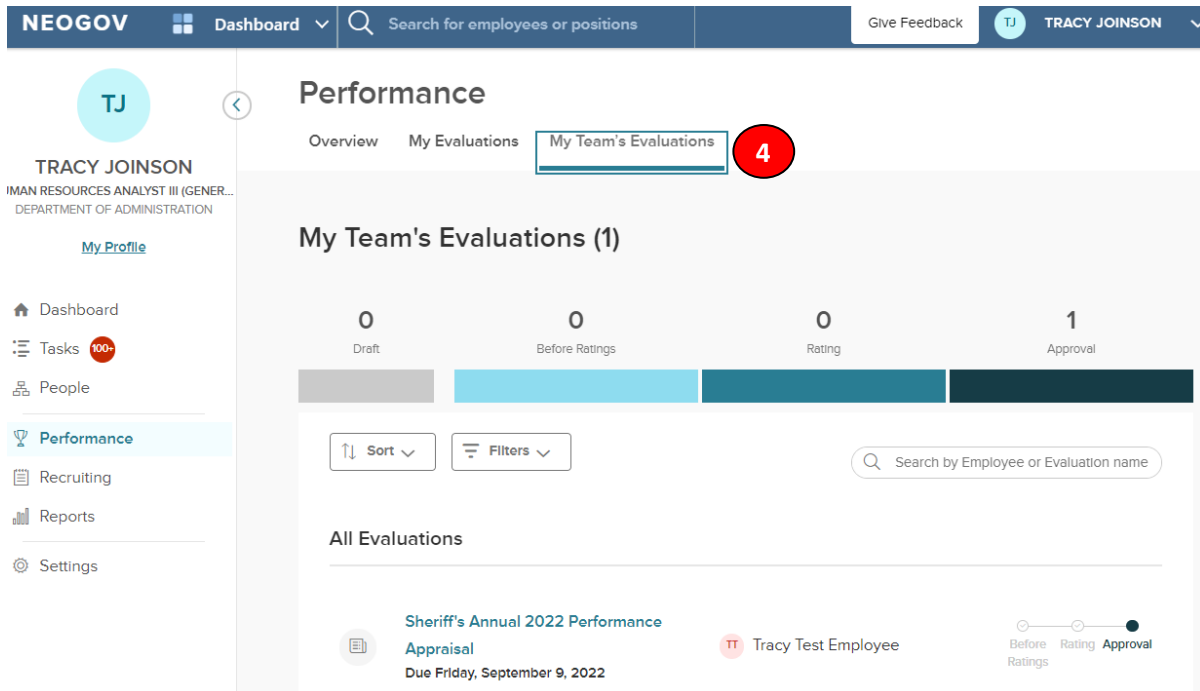
1. Any tasks related to performance development that require your action appear in “**My Tasks**”. To **complete a task**, select the task link to be re-directed to the task.
2. The “**My Team’s Evaluations**” box provides a status grouping of all of your tasks, including any overdue tasks. You can select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

The screenshot shows the NEOGOV Performance dashboard for Tracy Joinson. The top navigation bar includes the NEOGOV logo, a dashboard menu, a search bar for employees or positions, a feedback button, and the user's name (Tracy Joinson). The left sidebar contains a navigation menu with options: My Profile, Dashboard, Tasks (100+), People, Performance (highlighted with a red box), Recruiting, Reports, and Settings. The main content area is titled "Performance" and has three tabs: Overview (selected), My Evaluations, and My Team's Evaluations. The "My Tasks" section shows a task titled "APPROVAL" with a red circle containing the number "1" and a due date of "Due Thursday". Below it is a task titled "Approve and Sign Sheriff's Annual 2022 Pe..." with a red circle containing the number "1". The "My Team's Evaluations" section shows a red circle containing the number "2" and a "View all" link. Below this is a bar chart for "ACTIVE EVALUATIONS" with categories: Draft (0), Before Ratings (0), Rating (0), and Approval (1). Below the bar chart is a section for "OVERDUE TASKS" with a red circle containing the number "0" and the text "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).



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.