

NEOGOV PERFORM: EMPLOYEE USER GUIDE



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GETTING STARTED

This guide details how to navigate the NEOGOV system as an employee. Participants will learn how to self-rate, complete various tasks, and gain some tips and tricks of the system.

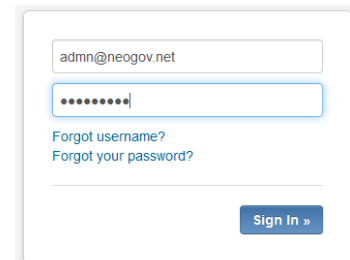
Before You Use This Guide

If you are not a current NEOGOV user, never did your onboarding through NEOGOV, and have not participated in the Performance Development Program in the past, the Performance Development Team in HR must send you an activation link to activate your account. Once activated, you may log into your Perform account and complete any assigned tasks.

Login

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

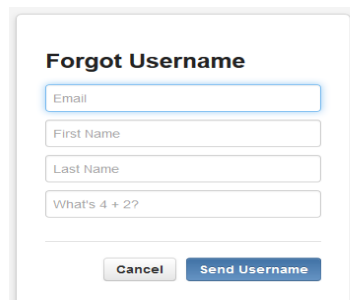
Enter your username and password then click **Sign In**:

A login form with two input fields: the first for a username (containing 'admn@neogov.net') and the second for a password (displayed as dots). Below the password field are two links: 'Forgot username?' and 'Forgot your password?'. At the bottom right is a blue button labeled 'Sign In'.

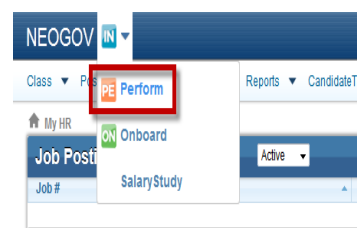
If a password reset is required, click the **“Forgot your password?”** link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.

A 'Password Reset' form with five input fields: 'Username', 'Email', 'First Name', 'Last Name', and 'What's 3 + 5?'. At the bottom are two buttons: 'Cancel' and 'Reset Password'.

If the username is forgotten, click the **“Forgot username?”** link. After entering the required information, a confirmation email will be sent to the email address in your profile with the username.

A 'Forgot Username' form with four input fields: 'Email', 'First Name', 'Last Name', and 'What's 4 + 2?'. At the bottom are two buttons: 'Cancel' and 'Send Username'.

Employees with access to other NEOGOV modules, such as Onboard, may also use the App Menu to toggle over to Perform as the username / password combination is consistent across modules.

A screenshot of the NEOGOV App Menu. The menu is open, showing options like 'Class', 'PE Perform' (highlighted with a red box), 'Onboard', 'Job Post', 'SalaryStudy', 'Reports', and 'CandidateT'. The 'PE Perform' option is the one to be selected.

NEOGOV OVERVIEW

Navigating the Dashboard

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

The screenshot shows the NEOGOV dashboard interface. At the top is a dark blue header bar containing the NEOGOV logo, a 'PE' icon, a 'Perform' dropdown menu, a search bar, and user profile information for 'Test Employee'. Below the header is a navigation bar with 'Employees', 'Library', and 'Help' links. The main content area is titled 'My Tasks' and includes a 'view all' link. Below this are seven colored boxes representing different task categories: Total, Rating, Approve And Sign, Sign, Approve, Other, and Overdue, each with a count of 0. A 'hide table' link is present. Below the boxes is a table with columns: Task, For Employee, Related To, and Due Date. The table is currently empty, displaying 'No Results Found' and 'No items to display'. At the bottom, the 'My Evaluations' section shows a card for 'Annual Evaluation 2018' with a due date of 'Mon, Dec 31, 2018' and a status of 'Not Started'. Red circles with numbers 1 through 4 highlight specific areas: 1 points to the 'Help' link, 2 points to the 'My Tasks' section, 3 points to the 'My Evaluations' section, and 4 points to the user profile dropdown.

1. **Dashboard Menu:** You will see the following tabs:
 - a. The Employee List
 - b. The **Library** (which houses the Success Factor List)
 - c. Help
2. **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
3. **My Evaluations:** Displays your three most recent performance development plans
4. **My Profile:** Access your Talent profile, update your password, and sign out of Perform

My Tasks

Any current tasks that require your action appear in **“My Tasks”**. You can filter on each status by selecting a task type and the list below filters accordingly.

My Tasks [view all](#) > **1**

1 Total	0 Rating	0 Approve And Sign	1 Sign	0 Approve	0 Other	0 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
Sign Annual Performance Evaluation for Ziggy Alberts 2	Ziggy Alberts	Annual Performance Evaluation	11/13/2017

1 - 1 of 1 items

1. **“View All”**: Select this to view tasks that are “Current”, “Completed”, “Canceled”, “Pending”, and “Skipped”
2. To **complete a task**, select the name to be re-directed to the task. The task types are “Total”, “Rating”, “Approve”, “Sign”, “Other”, and “Overdue”.

TIP!

To filter the list of tasks, click on any of the color-coded boxes. For example, if “Sign” is selected, all signature related tasks display in the list

The following legend can be used to identify actions that can be taken from the dashboard:

	Rate an evaluation
	Approve and sign
	Sign
	Approve an evaluation
	Other or Manual task
	Recurring Manual task
	Recurring Check-In

“Rating”, “Acknowledgement”, and “Approval” tasks require an action be taken and submitted in the system before the task status is automatically updated to *“Completed”*. Other types of tasks (for example, tasks created by users or HR) must be manually marked as *Completed*.

ANNUAL GOAL SETTING

Initial Goal Setting Meeting

This initial meeting allows the supervisor and employee to set expectations for the annual performance development period. Remember, the goals/objectives 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 up to date information.*

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 enter them into your Performance Development Plan. Once this is completed, you will receive a notification from NEOGOV to go into Perform to acknowledge the content.

1. To complete this step, click into the **Sign** task from the “**My Tasks**” section of your dashboard. You could also filter on the **Sign** box to find the Acknowledgment task more easily, if numerous tasks appear on the Dashboard:

The screenshot shows a dashboard titled "My Tasks" with a "view all" link. Below the title is a row of seven task category boxes: "Total" (1), "Rating" (0), "Approve And ..." (0), "Sign" (1, highlighted with a red box), "Approve" (0), "Other" (0), and "Overdue" (0). Below these boxes is a "hide table" link and a search icon. A table follows with columns: "Task", "For Employee", "Related To", and "Due Date". The first row of the table has "Sign 2019 Annual Evaluation for Tracy Test Employee" in the "Task" column (highlighted with a red box), "Tracy Test Employee" in the "For Employee" column, "2019 Annual Evaluation" in the "Related To" column, and "11/23/2021" in the "Due Date" column.

A yellow rectangular box with a black border contains the text: **TIP!**
You can always return to your dashboard by clicking on the **NEOGOV** logo in the top left corner of the screen. Two large red arrows point horizontally towards the box from the left and right sides.

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

Dashboard Employees Library Help


Acknowledgment Form

Go to Evaluation Details >

TT Tracy Test Employee
Test Position

EVALUATION NAME
2019 Performance
Development Plan

DUE DATE
Fri. Dec. 31,
2021

Sign

Content

SECTIONS

Goals

Success Factors

Professional Development

Achievements and Opportunities
for Growth

ALL SECTIONS

GOAL SECTION | 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: "Purge all files that are over three years old and move to storage by 5/31/22."

Collapse Section

Name	Description
Purge all files that are over three years old and move to storage by 5/31/22.	
By 12/30/22, update the employee handbook to include a searchable intranet version.	

3. A fly-out will appear:

NEOGOV PE Perform Search

Dashboard Employees Library Help

Acknowledgment Form

TT Tracy Test Employee
Test Position

EVALUATION NAME
2019
Performance
Development
Plan

DUE DATE
Fri. Dec. 31,
2021

Content

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Collapse Section

Name	Description
Purge all files that are over three years old and move to storage by 5/31/22.	
By 12/30/22, update the employee handbook to include a searchable intranet version.	

Sign

Cancel Submit

Comments

Write comment here...

Please sign your name below

Tracy Test Employee

Tracy Test Employee November 22, 2021

Auto-Generate Draw Signature

4. 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 when saved.*

COMPLETING YOUR INTERIM CHECK-IN

About halfway through the performance development cycle, your supervisor will reach out to you to meet and check in on 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, you will receive notification from NEOGOV to complete the check-in questions.

NEOGOV **PERFORM**

Dashboard Employees Library

My Tasks [view all >](#)

1 Total

hide table ^

Task

Interim Check-In

My Evaluations [view all of m](#)

2019 Performance Development Plan

Due: Fri, Dec 31, 2021

Status: Before Ratings

2019 Performance Development Plan

Evaluation Check-In for Tracy Test Employee

DRAFT AUTOSAVED ON 12/01/2021 02:26:06 PM

marks a required field.

This check-in will be viewable only to your assignee prior to releasing the evaluation.

Question 1

Current Year's Goals

Use this section to review and/or modify agreed upon objectives and to evaluate the progress to-date in achieving the objectives.

Type something

Press Alt + F10 to move to toolbar. Press ALT + O for Help.

Question 2

Journal Entries Previous

Search Feedback Entries

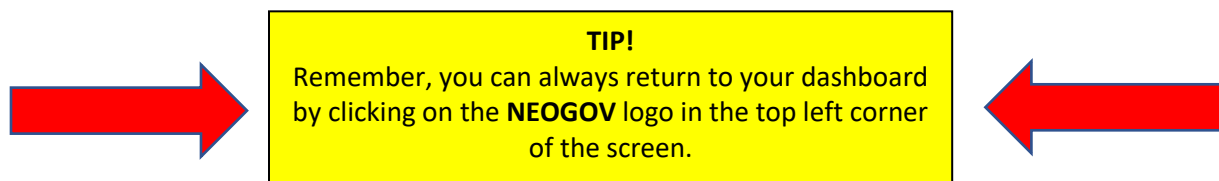
Filters: Author: ... Date: Past 12...

No Journal Entries found.

Close Publish

- Select **"Interim Check-In"** from the **"My Tasks"** section
- A fly-out appears with the **Check-In** questions
- Once you have completed all questions, select **"Publish"**.

Since this is a recurring task (meaning it *can* happen more than once in the cycle), it stays on the dashboard even though you are signing off on the task with this meeting. This task can be done multiple times throughout the annual cycle if you and your supervisor determine more than one documented check-in is needed. Once final rating step at the end of the cycle has begun, the check-in task disappears from your dashboard.



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 **dashboard** in Perform.
2. Click on the task to complete your **Self-Rating**.

My Tasks [view all](#) >

2 Total	2 Rating	0 Approve And ...	0 Sign	0 Approve	0 Other	0 Overdue
------------	-------------	----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For Tracy Test Employee's 2019 Performance Development Plan	Tracy Test Employee	2019 Performance Development Plan	12/09/2021
📅 Interim Check-In	Tracy Test Employee	2019 Performance Development Plan	12/24/2021

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

NEOGOV PE Perform Search Tracy Test Employee

Dashboard Employees Library Help

< Go to Evaluation Details Submit Evaluation

Tracy Test Employee TEST POSITION

SECTIONS

- Notes & Attachments
- Goals
- Success Factors
- Professional Development
- Achievements and Opportunities for Growth
- Summary

2019 Performance Development Plan

GOAL SECTION | 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: "Purge all files that are over three years old and move to storage by 5/31/22."

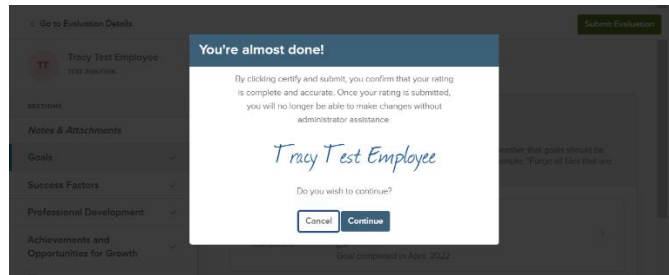
Purge all files that are over three years old and move to storage by 5/31/22. No comment

By 12/30/22. update the employee handbook to

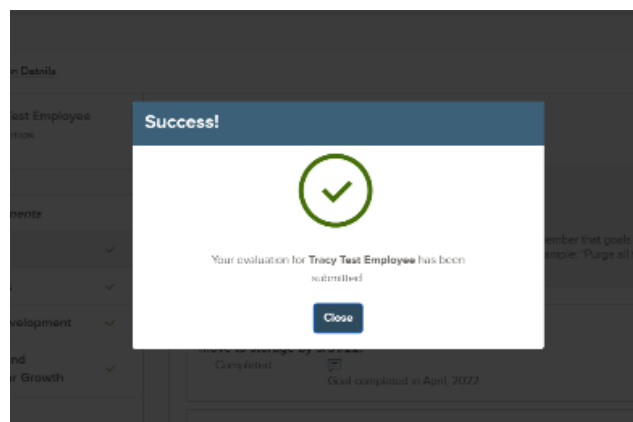
- a) To **view and rate** the different items, click into the various sections
- b) To rate an item, click an item name *within* a section, and a fly-out of the **Rating Card** appears (see below for further information)
- c) To leave the rating card and return to the evaluation detail page, select “**Go to evaluation details**”

4. Upon selecting the item name within a section, 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.
 - b) Type any text into the **Comments** box to explain progress with goals, professional development and success factors.
 - i. Required comments are highlighted in red
 - ii. While rating, the system auto saves all progress made
 - iii. 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. 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.
5. 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.
 6. Once all required rating and/or comments are complete, select the “**Submit Evaluation**” button in the top right corner.
 7. 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

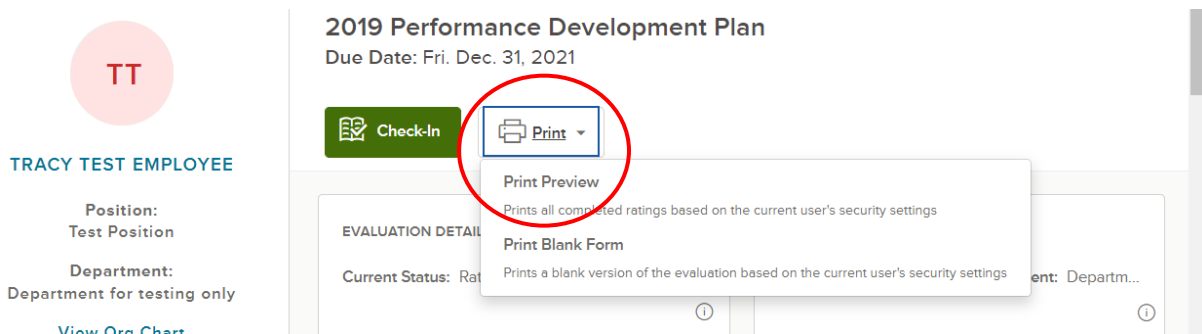


8. You receive a confirmation message. Once it is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click **"Cancel"**. Otherwise, select **"Continue"**.



Once your self-rating has been successfully submitted, your Manager is notified.

9. If you would like to print a copy of your ratings for your meeting with your supervisor, which is the next step in the process, you can select **"Print Preview"** (under the "Print" menu)



Signing Your Completed Performance Development Plan

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

1. Once your manager has completed his/her rating and you have met to discuss the results, you will need to acknowledge and sign-off. Sign-in to NEOGOV Perform and either navigate to your 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.

My Tasks [view all >](#)

Task	For Employee	Related To	Due Date
Rating For Tracy Test Employee's 2019 Performance Development Plan	Tracy Test Employee	2019 Performance Development Plan	12/09/2021
Interim Check-In	Tracy Test Employee	2019 Performance Development Plan	12/24/2021

2. You are redirected to the Acknowledgment Form.

NEOGOV Perform

Dashboard Employees Library Help

Acknowledgment Form [Go to Evaluation Details >](#)

TT Tracy Test Employee
Test Position

EVALUATION NAME: 2019 Test for TTE
DUE DATE: Tue. Nov. 09, 2021

4 Sign

Rating Summary [View Other Approvers >](#)

TT Tracy Test Employee
Test Position

TT Tracy Test Supervisor
2nd Test Position

SECTIONS

Goals 3

Success Factors

Professional Development

Achievements and Opportunities for Growth

ALL SECTIONS

GOAL SECTION | 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: "Purge all files that are over 3 years old and move to storage by 5/31/22."

Bake Cookies- no bake brownies
Make them chewy.

TT Tracy Test Employee ☒ Completed ☐ I don't like my goals. I baked cookies but they weren't chewy.

TT Tracy Test Supervisor ☒ Completed ☐ Cookies were baked

3. Navigate through the various **Sections** by clicking on the section name; scroll through each section to review the ratings and any comments provided

- Once you have reviewed the completed review, 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.

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

- 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 dashboard.

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.