NEOGOV PERFORM: EMPLOYEE USER GUIDE

STATE OF RHODE ISLAND
DEPARTMENT OF
ADMINISTRATION

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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.

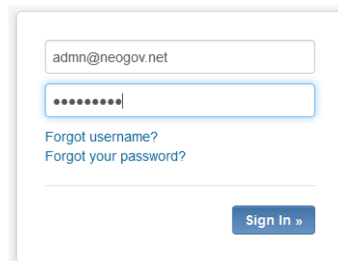
Before You Use This Guide

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.

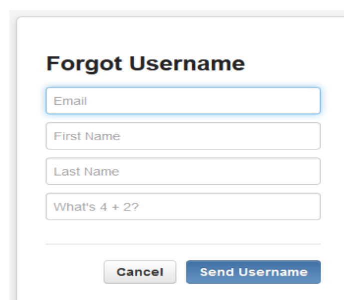
Login

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

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

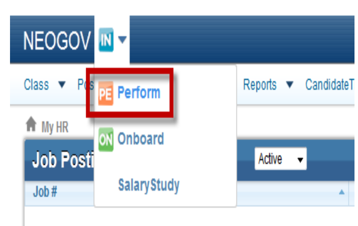


If a password reset is required, click the "**Forgot your password?**" link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.



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.

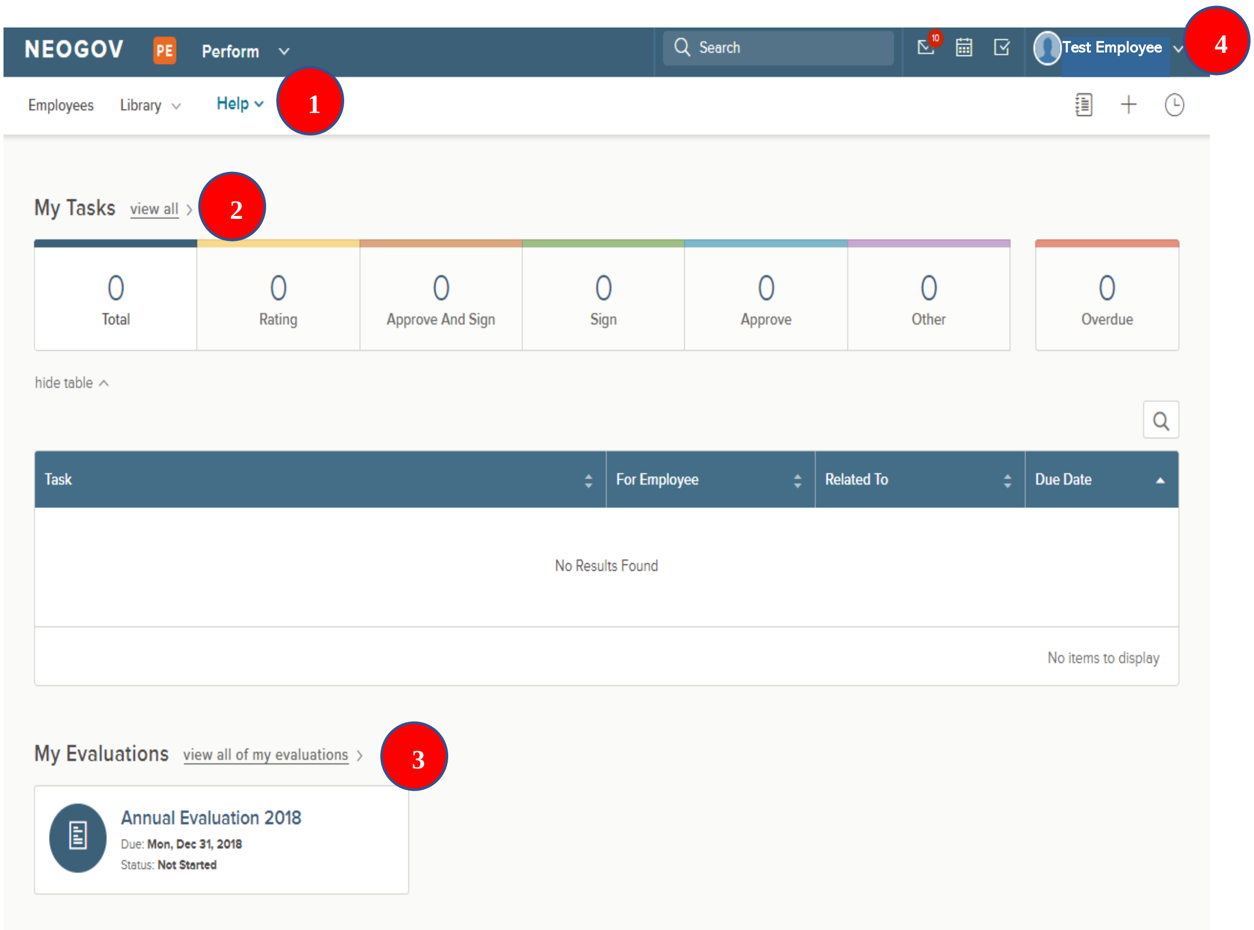
Employees with access to other NEOGOV modules, such as Onboard, may also use the App Menu to toggle over to Perform as the username / password combination is consistent across modules.



NEOGOV OVERVIEW

Navigating the Dashboard

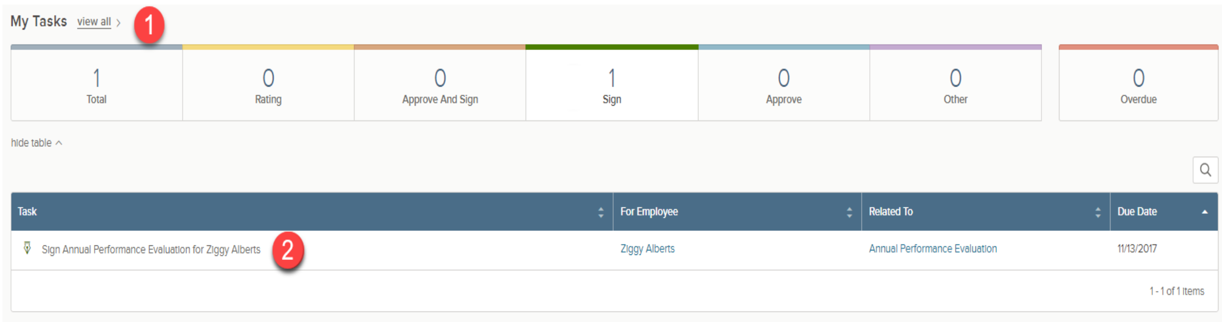
Upon logging into Perform, you arrive at your **Dashboard.** The dashboard is a central location from which all tasks can be completed in the module.



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.



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

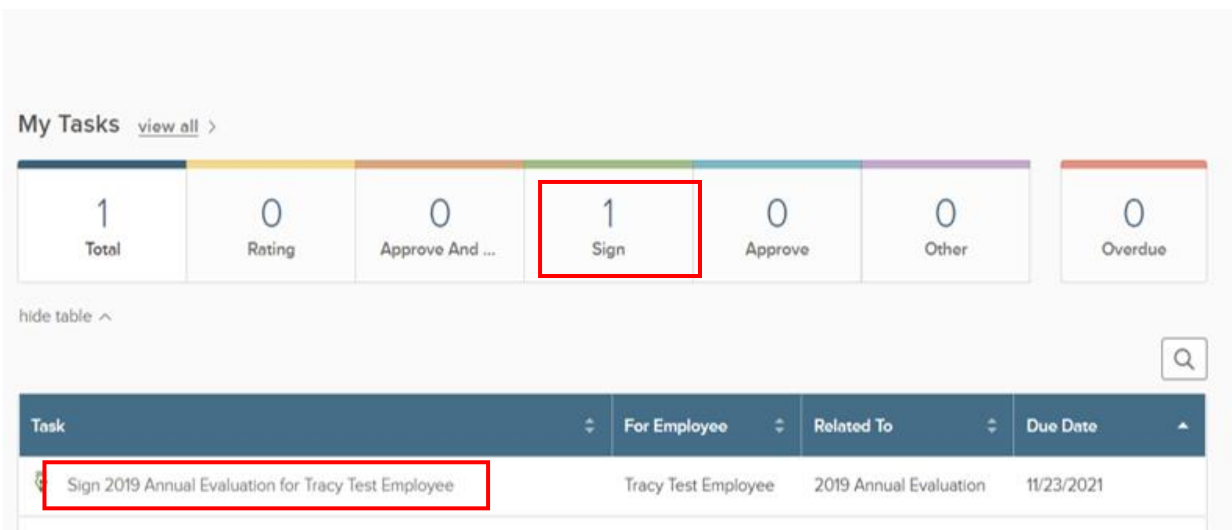
Initial Goal Setting Meeting

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

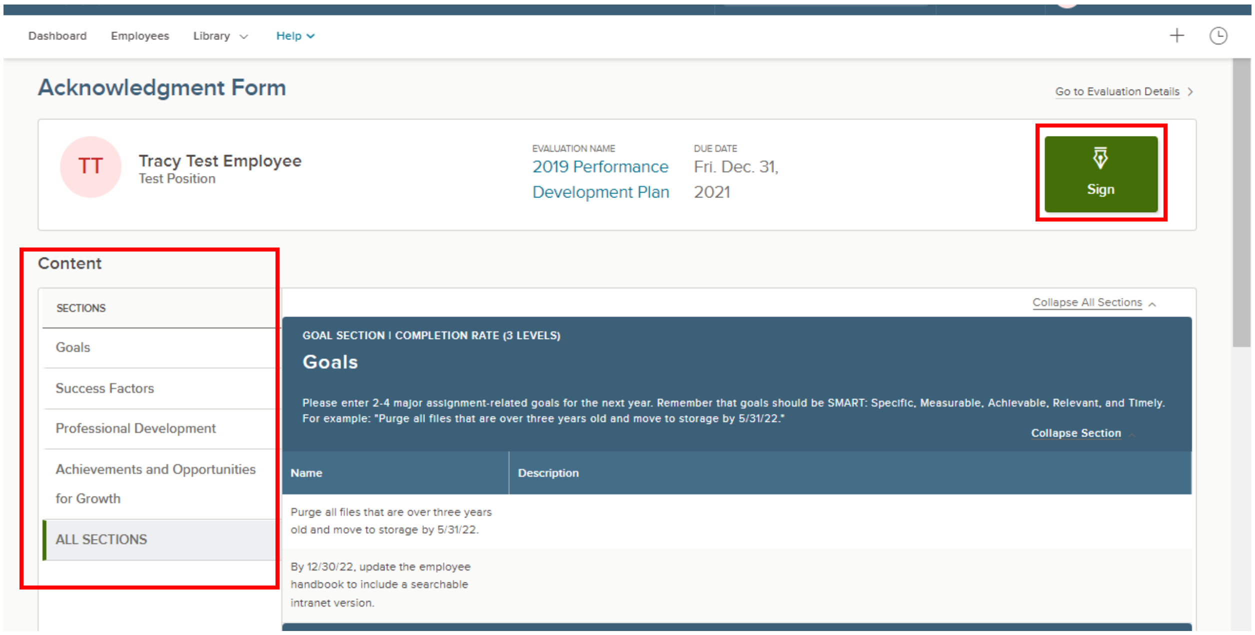
After you have met with your supervisor and discussed your goals, professional development, and success factors for the upcoming year, your supervisor will enter them into your Performance Development Plan. Once this is completed, you will receive a notification from NEOGOV to go into Perform to acknowledge 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:

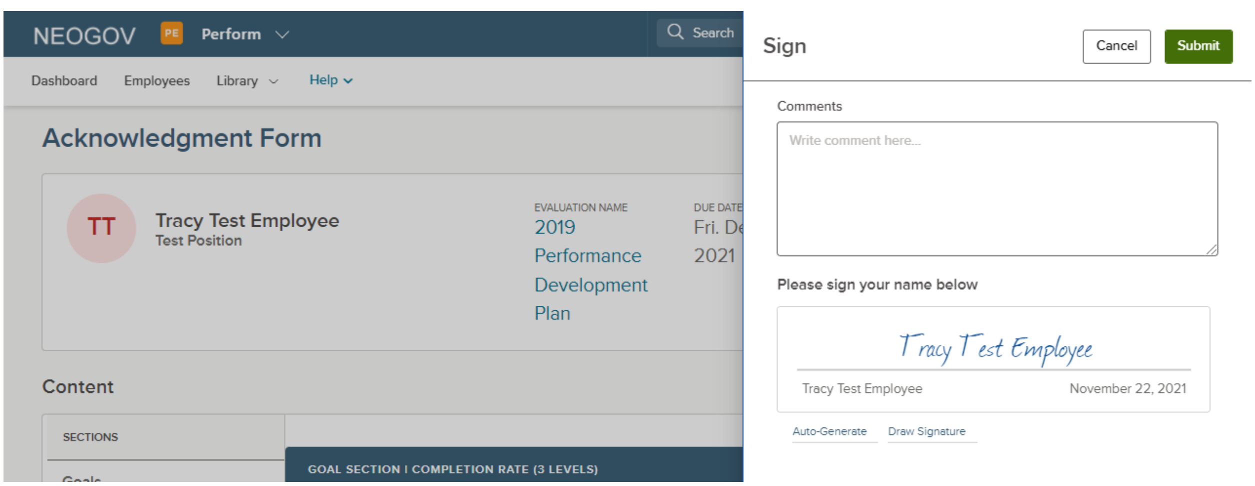


TIP!
You can always return to your dashboard by clicking on the **NEOGOV** logo in the top left corner of the screen.

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:



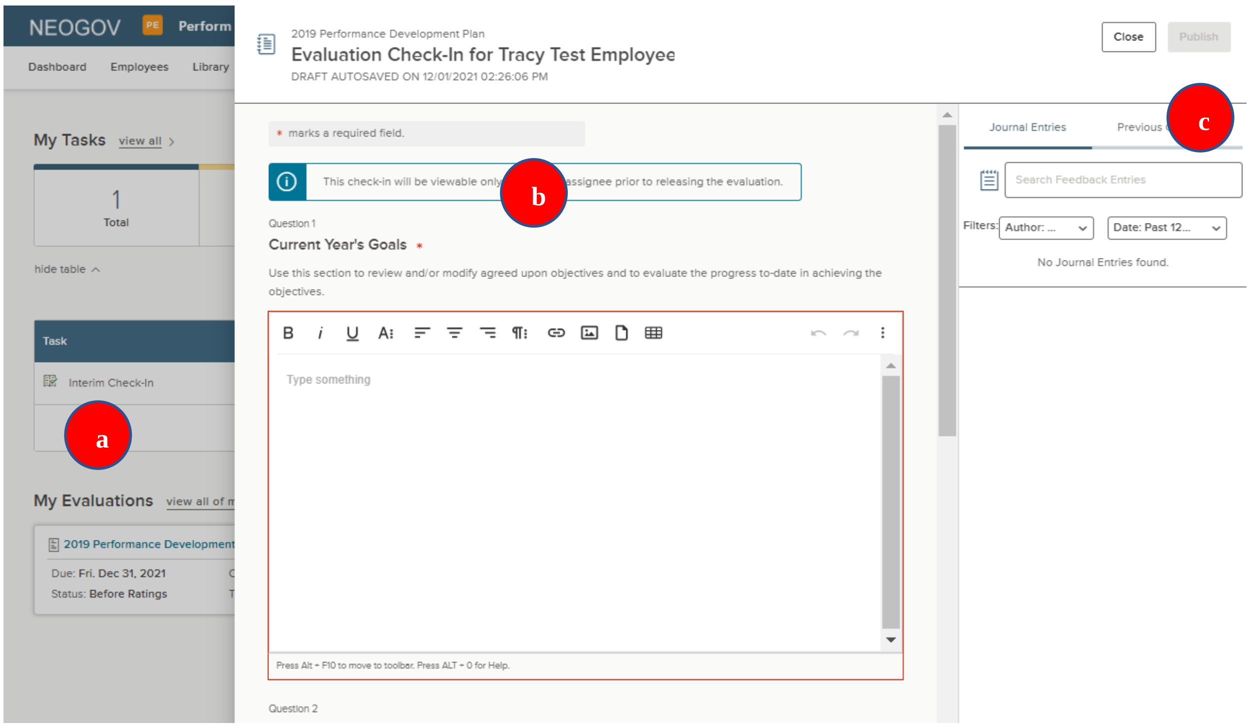
3. A fly-out will appear:



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). <u>Once you and your supervisor have had your interim check-in meeting, you will receive notification from NEOGOV to complete the check-in questions.</u>



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

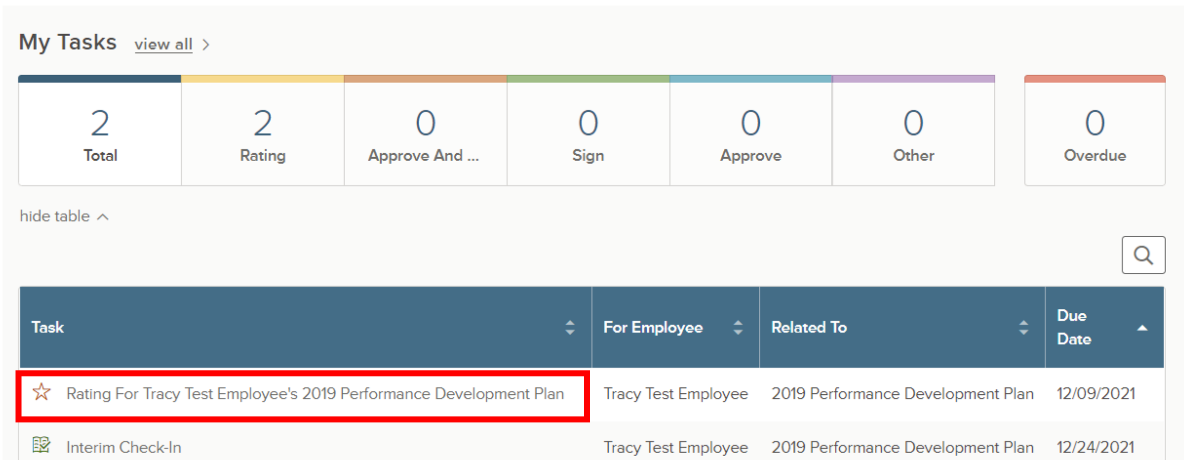
Since this is a recurring task (meaning it *can* happen more than once in the cycle), it stays on the dashboard even though you are signing off on the task with this meeting. This task can be done multiple times throughout the annual cycle if you and your supervisor determine more than one documented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

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

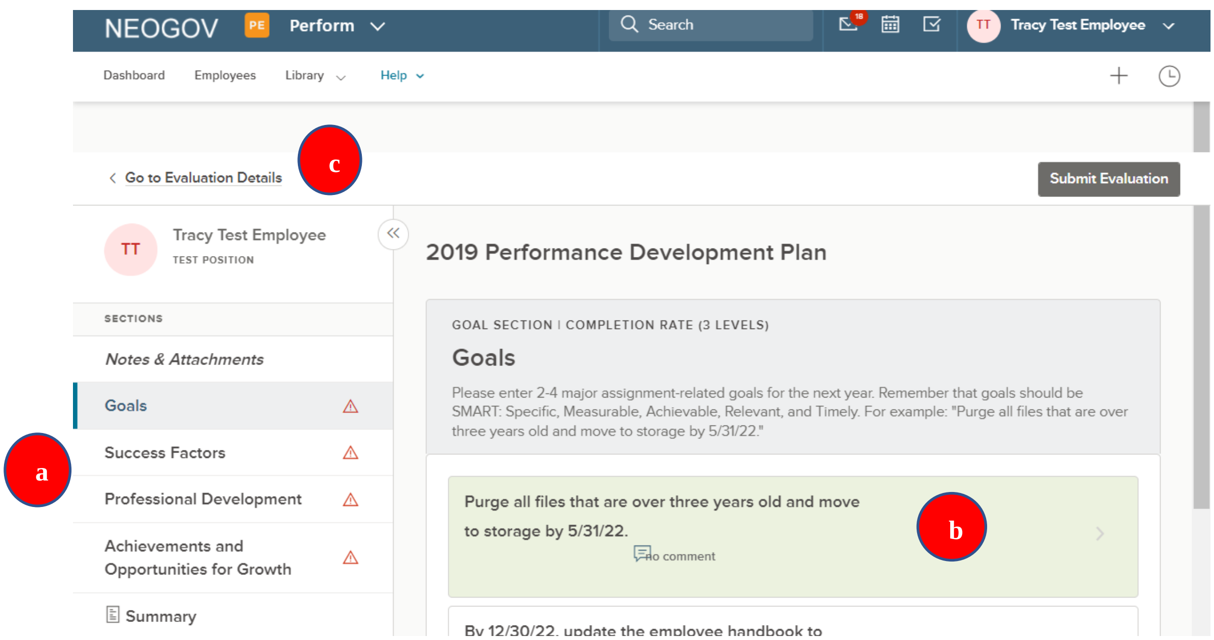
COMPLETING YOUR ANNUAL SELF-RATING

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**.

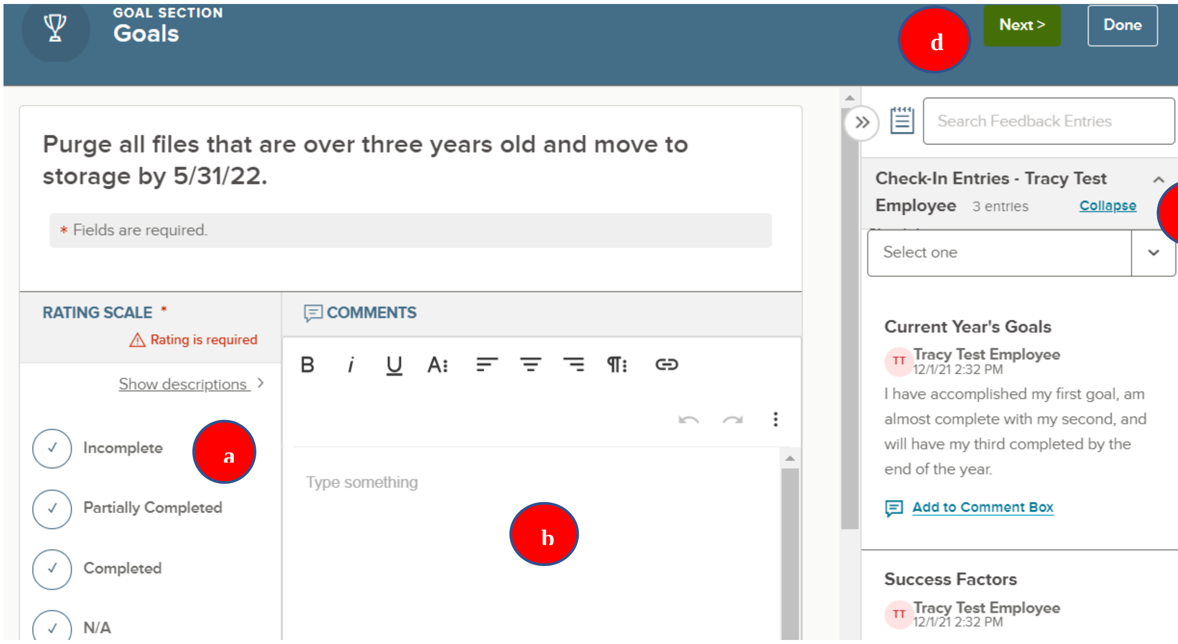


3. You are then re-directed to the Rating Form.



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:



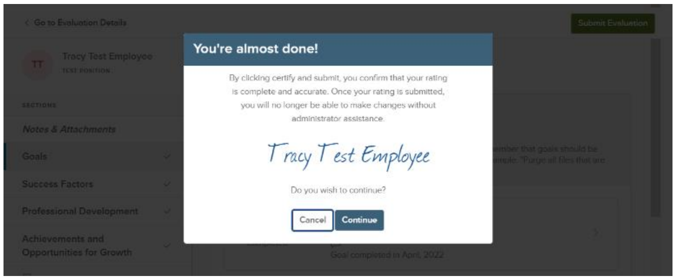
a) You see a **Rating Scale.** To view a description of each rating scale value, select the "**Show descriptions"** text and a flyout appears with detailed information.

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

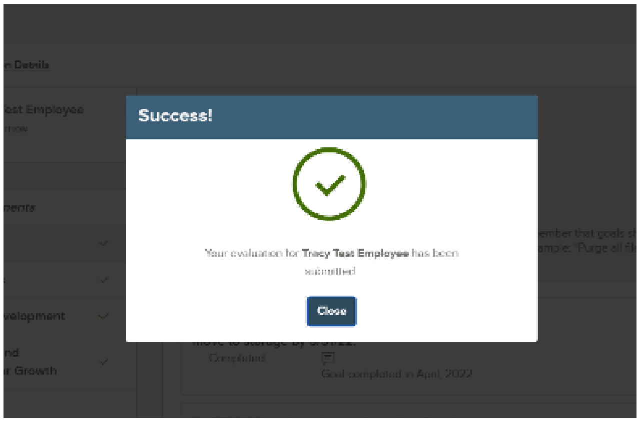
c) You will see "**Check-In Entries"** on the right side of the card. You can copy the feedback entries directly into the comment box by selecting "**Add to Comment Box"**. To filter for any specific key words, use the "*Search Feedback Entries"* bar.

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

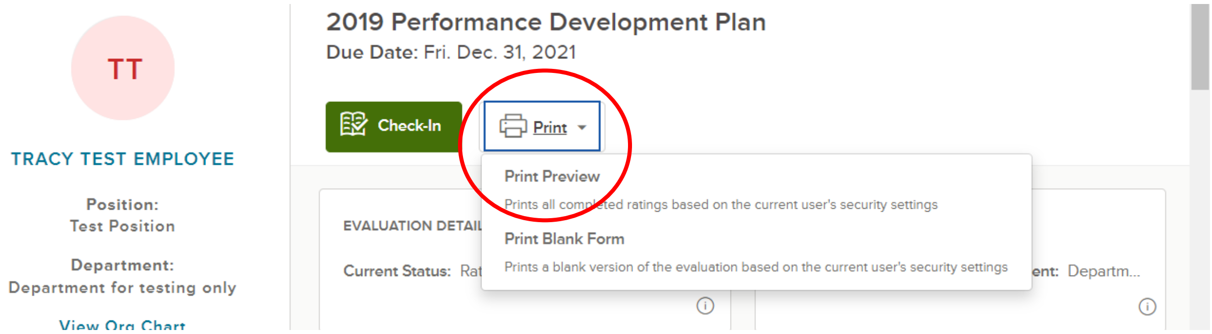


8. You receive a confirmation message. Once it is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click "**Cancel**". Otherwise, select "**Continue**".



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

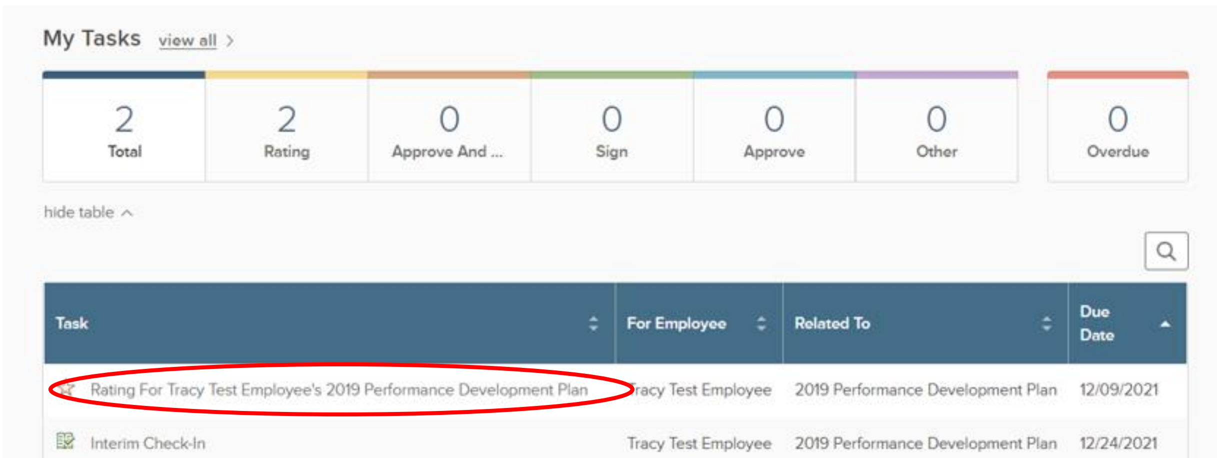
9. If you would like to print a copy of your ratings for your meeting with your supervisor, which is the next step in the process, you can select "**Print Preview**" (under the "Print" menu)



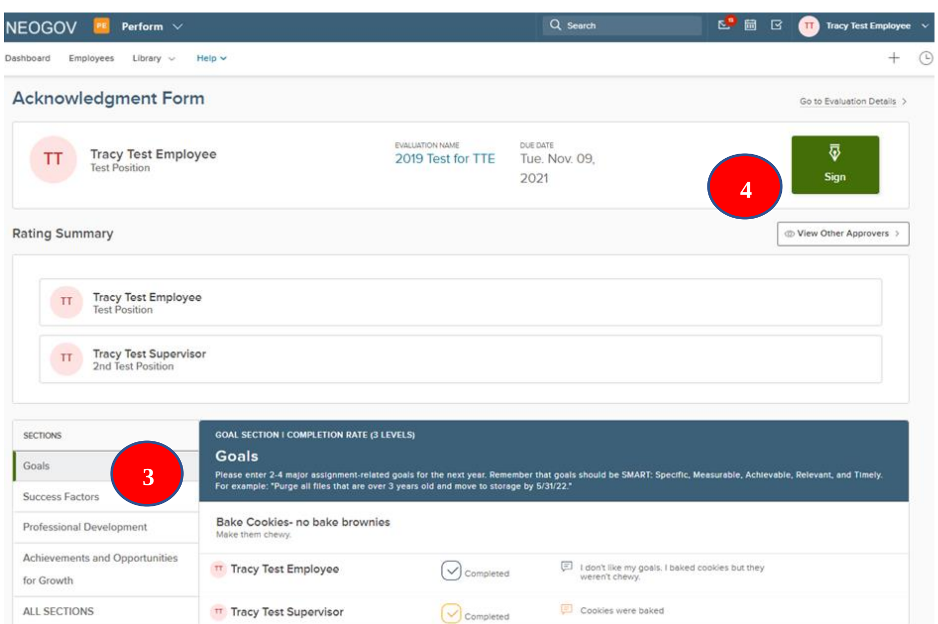
Signing Your Completed Performance Development Plan

<u>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.</u>

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.

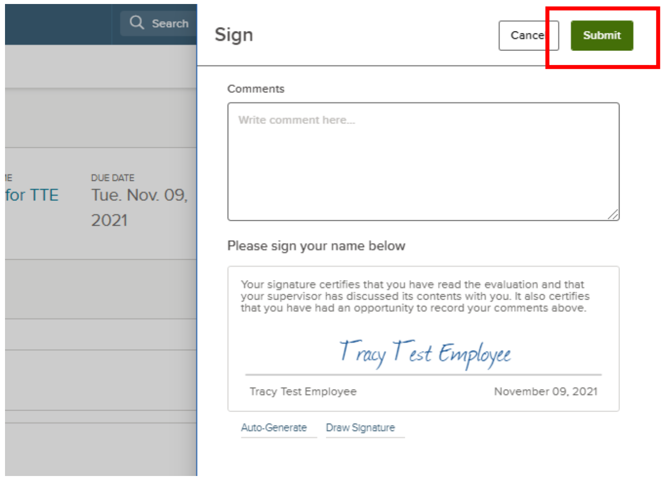


2. You are redirected to the Acknowledgment Form.



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

4. 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.



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 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.