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

Before You Use This Guide
Your HR Admin 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:

```plaintext
admin@neogov.net
Password:
Forgot username?
Forgot your password?
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.

```plaintext
Password Reset
Username
Email
First name
Last name
What's 3 + 5?
Cancel
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.

```plaintext
Forgot Username
Email
First name
Last name
What's 4 x 2?
Cancel
Send Username
```

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

Navigating to 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 system.

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 evaluations
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 appropriately.

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 and Sign, Sign, Approve, 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:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌟</td>
<td>Rate an evaluation</td>
</tr>
<tr>
<td>📚</td>
<td>Approve and sign</td>
</tr>
<tr>
<td>😊</td>
<td>Sign</td>
</tr>
<tr>
<td>😊</td>
<td>Approve an evaluation</td>
</tr>
<tr>
<td>📩</td>
<td>Other or Manual task</td>
</tr>
<tr>
<td>🔄</td>
<td>Recurring Manual task</td>
</tr>
<tr>
<td>🔄</td>
<td>Recurring Check-In</td>
</tr>
</tbody>
</table>

Rating, Acknowledgement, and Approval tasks must be actioned 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 meeting allows the supervisor and employee to set expectations for the annual performance development period. Remember, the goals/objectives should be SMART: Specific, Measurable, Achievable, Relevant, and Time-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.

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

Acknowledging Your Goals
Once your supervisor has added your agreed-upon goals to your annual evaluation, you will be prompted to sign off on them.

1. To complete the Sign task from the Dashboard, click into Sign [Evaluation name] for [Your Name] from the My Tasks section. You could also filter on the Sign box to find the Acknowledgment task more easily, if numerous tasks appear on the Dashboard:

   ![Dashboard Screenshot]

   **TIP!**
   You can always return to your Dashboard by clicking on NEOGOV in the top left corner of the screen.
2. You should review the content of the evaluation 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 approve the goals, success factors, and professional development your supervisor has entered. NOTE: Any comments entered will appear on the final evaluation printout when saved.
COMPLETING YOUR INTERIM CHECK-IN

About halfway through the evaluation period, 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.

1. Navigate to your dashboard and select the Interim Check-In task from My Tasks.

   a) Select Interim Check-In from My Tasks
   b) A fly-out appears with the Check-In questions.

2. Once you have completed all questions, select Save.

Since this is a recurring task, it stays on the dashboard. You can use this task multiple times throughout the evaluation period if you determine more than one formal check-in is needed. Once final rating has begun, the check-in task disappears.

TIP!
Remember, you can always return to your Dashboard by clicking on NEOGOV in the top left corner of the screen.
COMPLETING YOUR ANNUAL SELF-EVALUATION

At the end of the evaluation period, 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. Here, you see the task to complete your Self-Rating. Click on the evaluation.

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

   a) To view and rate the different items, click the various sections
   b) To rate an item, click an item name, e.g. Goals, 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 back to evaluation detail page
4. Upon selecting the item name, the rating card fly-out appears:

![Rating Card Fly-out](image)

- **a)** You see a **Rating Scale**. To view a description of each rating scale value, select the **Show descriptions** button 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 from the evaluation year and what you’d like to focus on moving forward to the next evaluation year.

6. Once all required rating and/or comments are complete, select the **Submit Evaluation** button in the top right corner.
7. You receive a confirmation message. Once the evaluation 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 evaluation has been successfully submitted, your Manager is notified.

8. If you would like to print a copy of your ratings for your meeting with your manager, you can click print preview at the top of your evaluation page.
Signing Your Completed Evaluation

Once your manager has completed their rating and you have met to discuss the results, you will receive notification from NEOGOV to sign in and sign your finalized evaluation.

1. Navigate to your Dashboard and click the task to Sign [Evaluation Name] for [Your Name].

2. You are redirected to the After Ratings Form.

   a) Navigate through the various Sections by clicking on the name
      i. Scroll through each section to review the ratings and any comments provided

   b) To view other approvers and the status of their task, select View Other Approvers
      i. A fly-out appears with all other approver information

   c) Once you have reviewed the completed evaluation, select the Sign button
      i. A fly-out appears with the signature box and an optional comment section
3. Once you have signed the evaluation, an Evaluation was acknowledged! banner appears at the top of your screen. If there are no other approvers/signatures in the process, the evaluation status changes to Completed. NOTE: Signing the evaluation does not indicate that you agree with the contents, rather that you met with your supervisor and received and reviewed the evaluation. If you have any concerns about your evaluation contents, please contact the DOA Human Resources Performance Development Team at doa.performancedev@hr.ri.gov.