NEOGOV PERFORM: SUPERVISOR USER GUIDE

STATE OF RHODE ISLAND
DEPARTMENT OF ADMINISTRATION

Division of Human Resources
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Table of Contents

GETTING STARTED

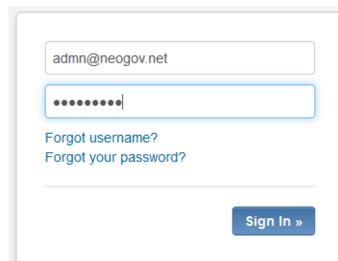
This guide details how to navigate the NEOGOV Perform system as a supervisor. Participants will learn how to complete various tasks and gain tips and tricks of the system.

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 (*IF YOU COMPLETED YOUR 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)*. Once activated, you may log into your Perform account and complete any assigned tasks.

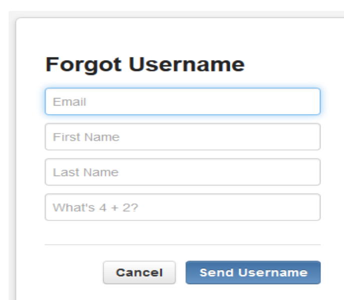
Login

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

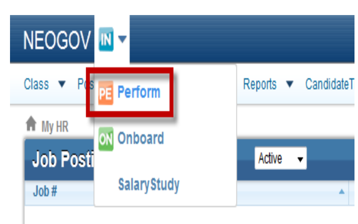
Enter your username and password then click **Sign In**:



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.

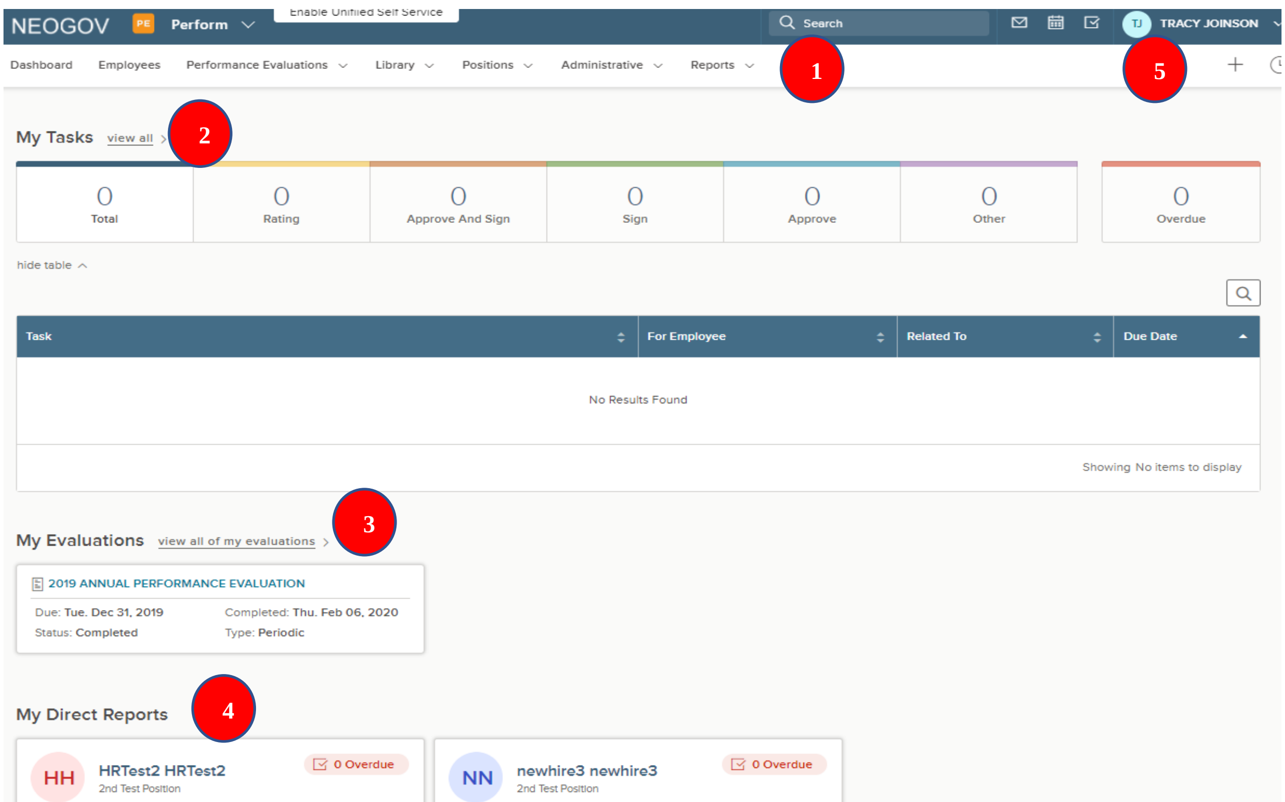


Employees with access to other NEOGOV products, such as Onboard, may also use the module menu to toggle to Perform as the username / password combination is consistent across modules.

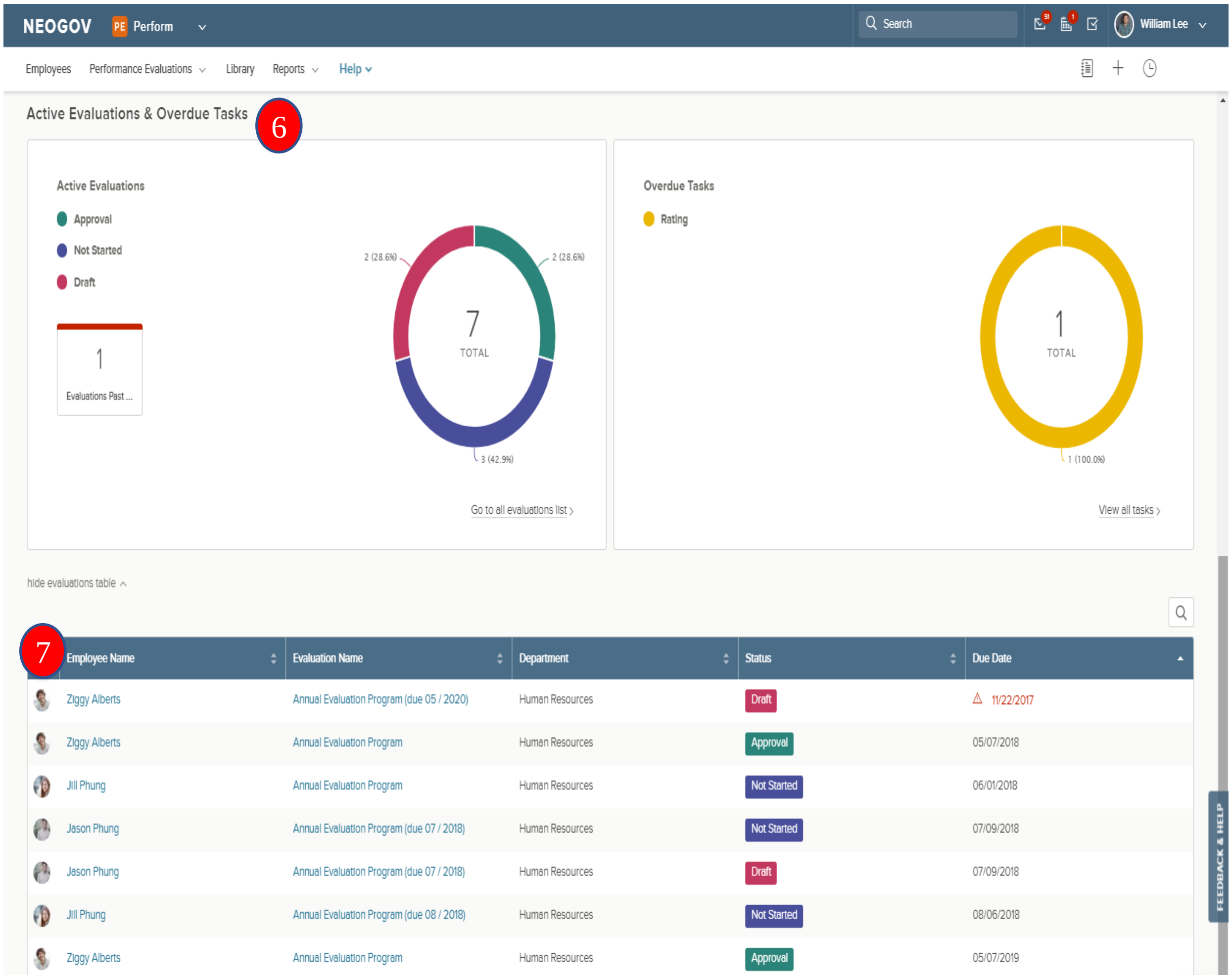
NEOGOV OVERVIEW

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. **You can always navigate to your dashboard by clicking on NEOGOV in the top left corner of your screen.**



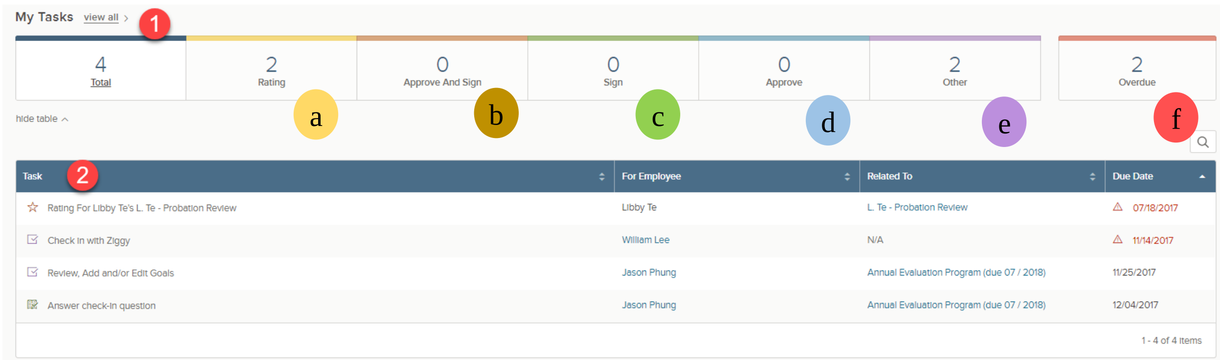
1. **Dashboard Menu:** You see the following tabs:
   a) The **Employees List**
   b) The **Performance Evaluation List**
   c) The **Library** (which houses the Success Factor List)
   d) Reports
   e) Help
2. **My Tasks:** Contains all tasks currently requiring your action
   a) Color-coded boxes located within this section can be used to filter the various task types
3. **My Evaluations:** Displays *your own* three most recent performance development plans (if applicable)
4. **My Direct Reports**: All of your direct reports
5. **My Profile:** Access your talent profile, update your password, and sign out of NEOGOV



6. **Active Evaluations and Overdue Tasks:** Interactive graphs that display all active and overdue performance development plans and related tasks for both your direct reports and yourself
7. **Active Evaluation and Overdue Tasks List**: Updates to reflect the corresponding information selected on the graphs above

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 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

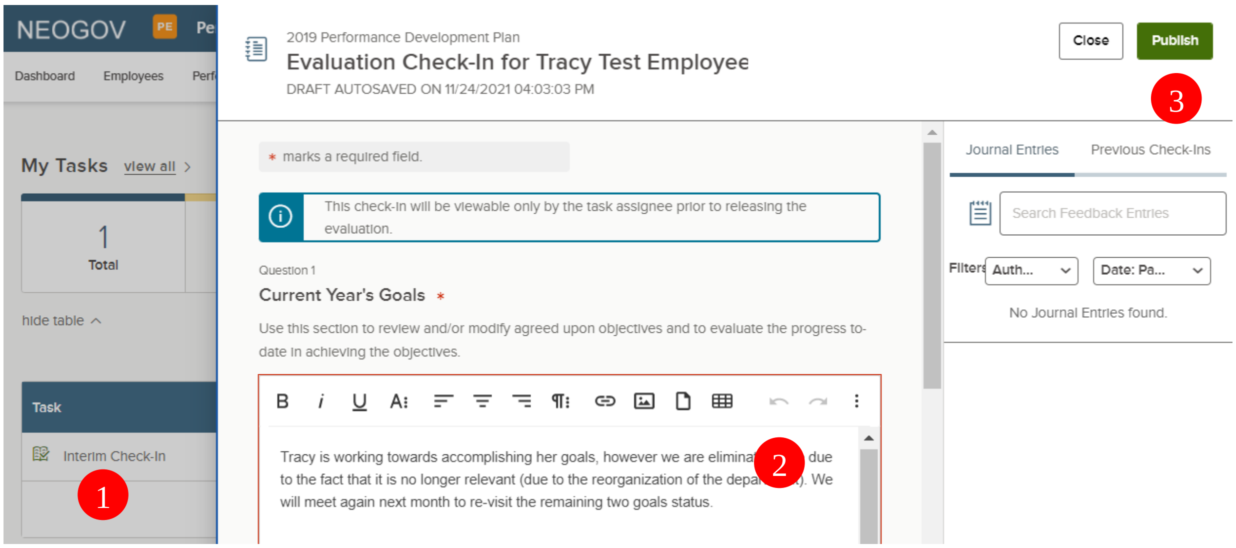
The following legend can be used to identify actions that can be taken from the Dashboard:

a	Rate – at the end of the annual cycle as part of the final review
b	Approve and sign – at the end of the annual cycle
c	Sign – generally used as an acknowledgment
d	Approve a performance development plan
e	Other task such as a required meeting or interim check-in
f	Overdue tasks

"Rating", "Acknowledgement", and "Approval" tasks must be attended to 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*.

Completing Tasks

My Tasks is located on your dashboard. Here, you see any current or overdue tasks that require your action.

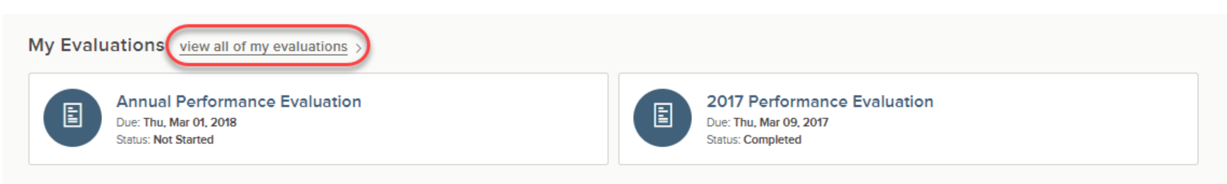


1. Click into the corresponding **Task Name** from the list
2. A fly-out appears with the task details
    a) Enter any comments or perform the required action as necessary
3. When you have completed the task, select **Publish/Save/Complete Task**

The completed task disappears from your dashboard task list. To view the completed task, select the "**View al"l** button. *NOTE: Acknowledgment tasks re-trigger any time there are changes made to the performance development plan.*

My Evaluations

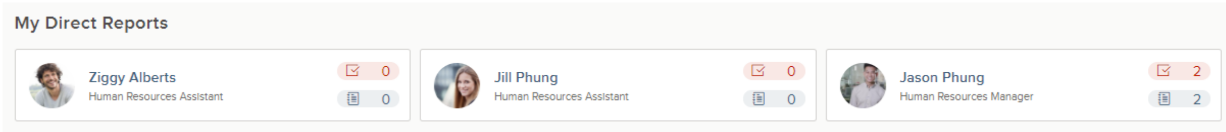
Underneath the tasks section of the dashboard is the **My Evaluations** section. Here are your own three most recent performance development plans (if applicable). Select any one of them to be redirected to the Evaluation Detail page for the corresponding performance development plan.



To view all historical performance development plans, select "**view all of my evaluations"**. To view the detail page of a specific performance development plan, select the title.

My Direct Reports

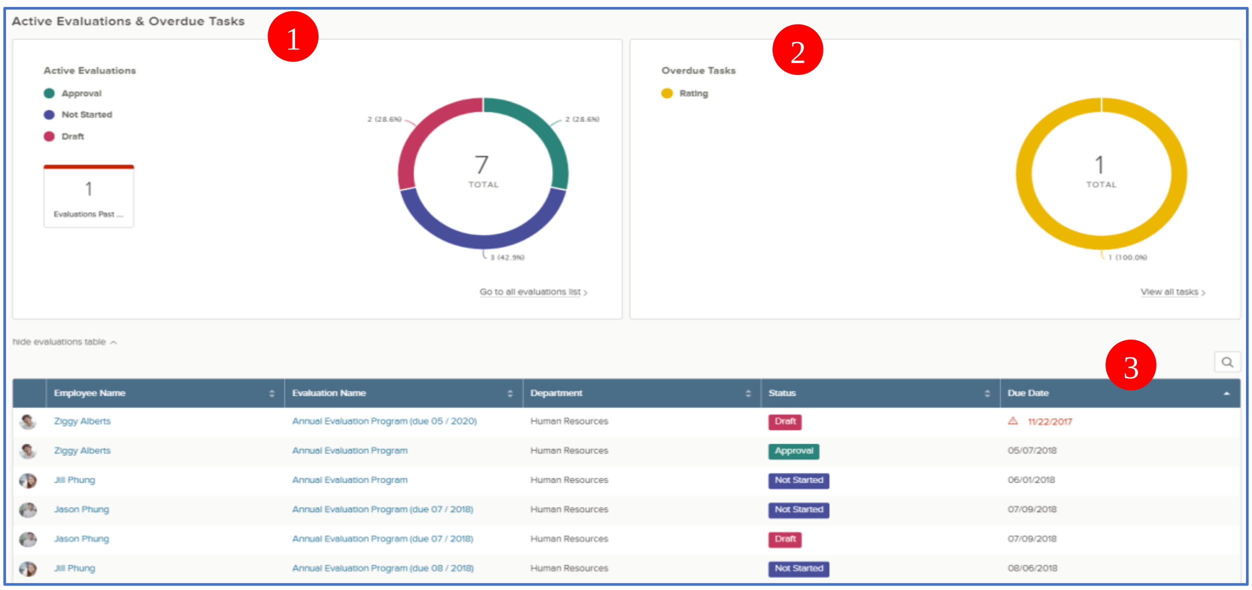
Below your evaluations section is “**My Direct Reports”**, listing all of your direct reports.



Click on the name of your direct report to be redirected to his/her Talent Profile page. Additionally, you can click into their overdue tasks (red icon), and a fly-out appears for the respective item.

Active Evaluations and Overdue Tasks

The next section is the “**Active Evaluations and Overdue Tasks”**.



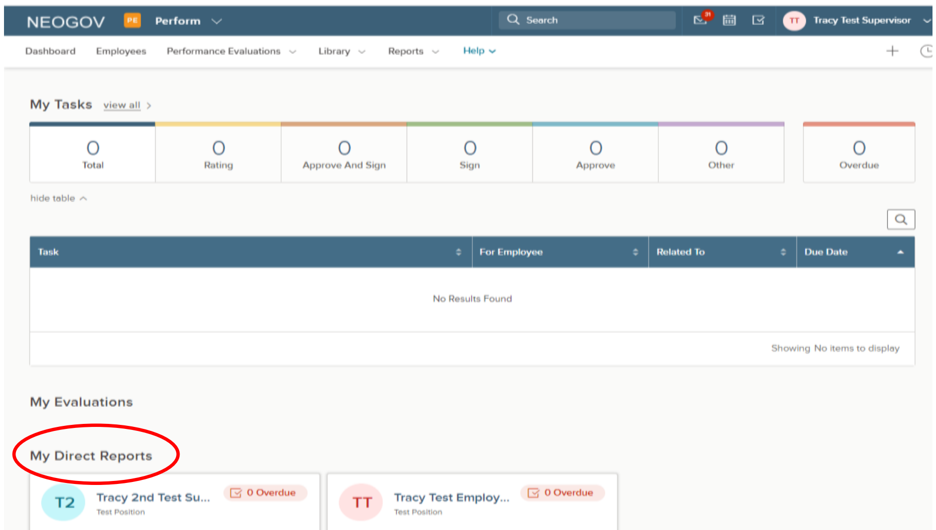
1. The “**Active Evaluation Graph”** is divided by four statuses: *Approval*, *Rating*, *Not Started*, and *Draft*. Click on any respective part of the graph to filter the list below.
2. The “**Overdue Tasks”** graph displays the number of overdue tasks divided by the four statuses. Select the graph for a fly-out containing the list of all overdue tasks.
3. To hide the list, select the “**hide evaluations table”** button. Use the magnifying icon to filter any column.

ANNUAL GOAL SETTING

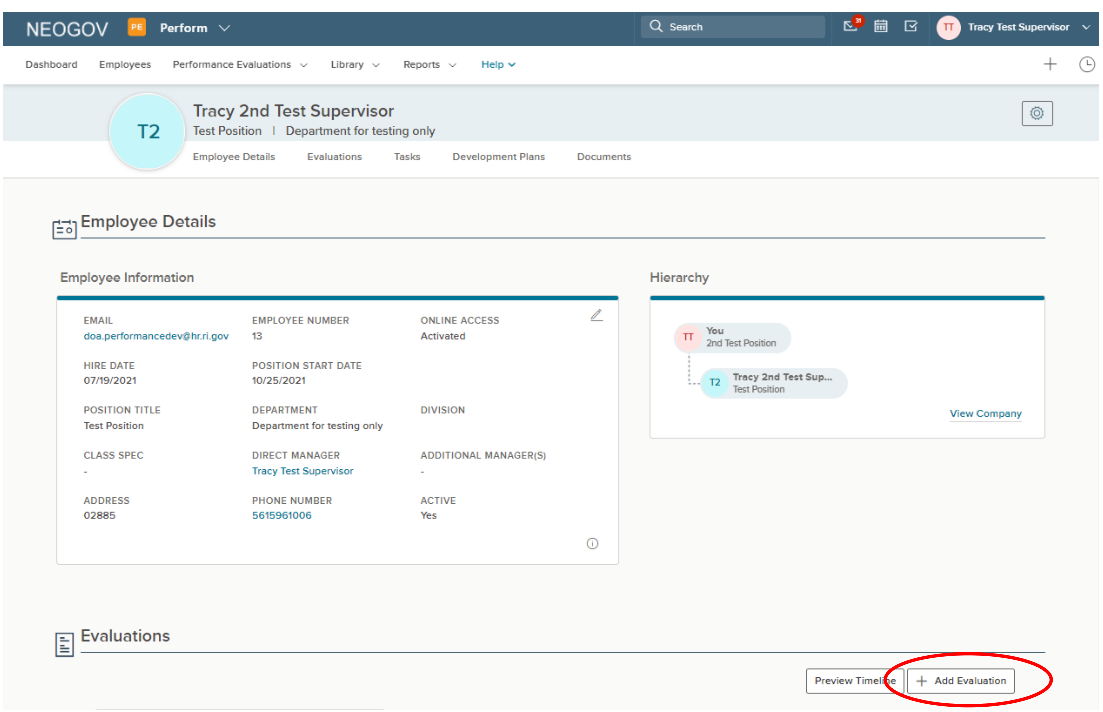
At the beginning of the performance development cycle, you will log into NEOGOV and activate your employees' performance development plan(s).

Creating and Activating Performance Development Plans

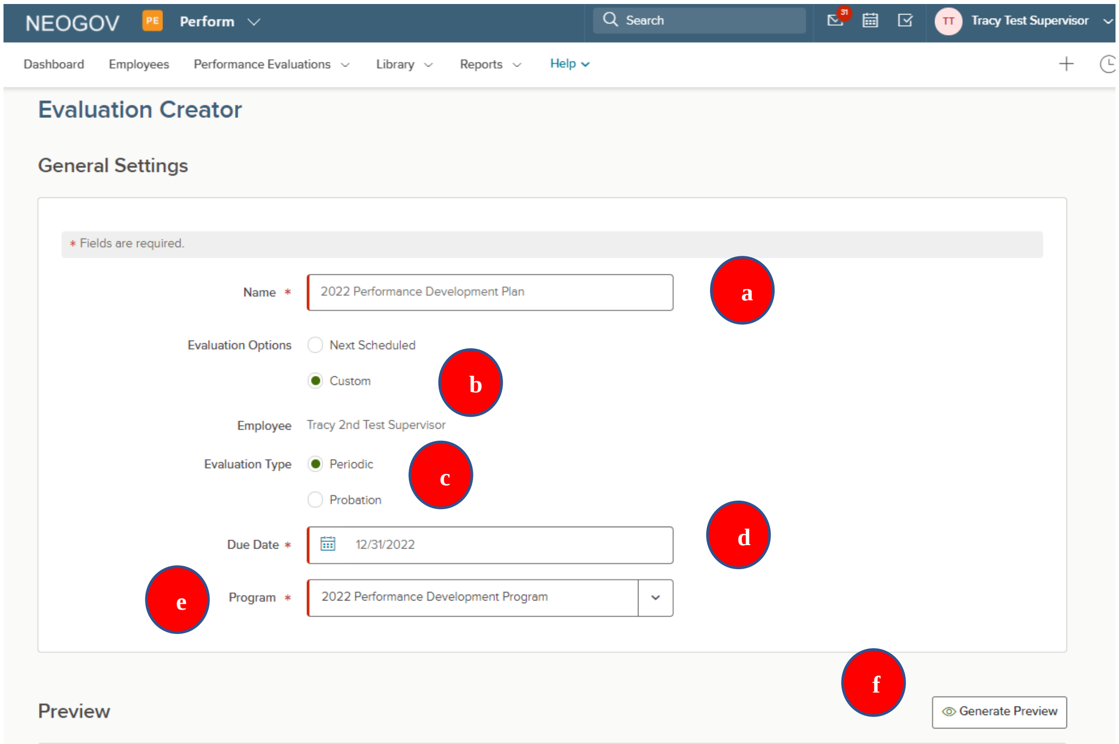
1. Login in to NEOGOV Perform and navigate to your dashboard. From the "**My Direct Reports"** section, search for the specific employee and select his/her name.



2. You are then taken to the employee's **Talent Profile**. To create a performance development plan, navigate to his/her "**Evaluation"** section. Under the Evaluations section, select "**+Add Evaluation".**



The Evaluation Creator page appears.



a) Enter *[Evaluation Year] Performance Development Plan* as the **Name** for the evaluation
b) Create a **Custom** evaluation
c) Evaluation Type is pre-filled to **Periodic**
d) Enter in the **Due Date (December 31st of the current year)**
e) Select which **Program** to create the performance development plan from
f) To see a preview of the performance development plan select "**Generate Preview"**

3. Once all options have been configured, scroll to the bottom and select "**Create"**. Once created, you are re-directed to the "Evaluation Detail" page.

The performance development plan is now activated and the first step in the process begins.

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

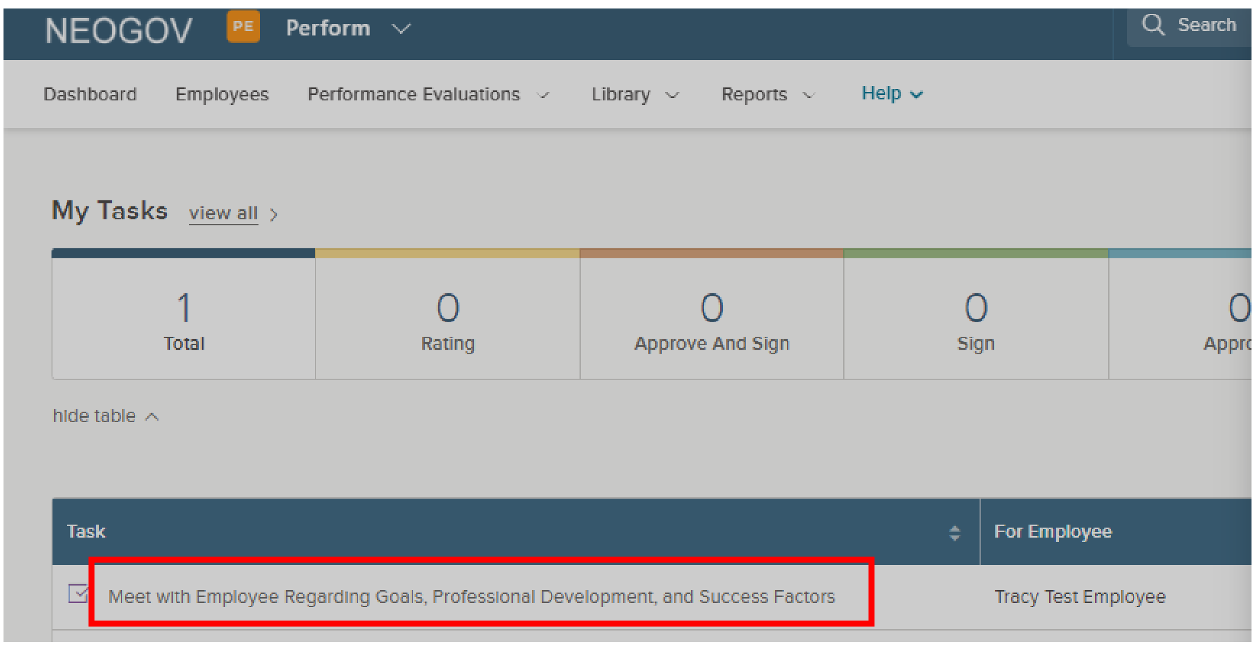
Initial Goal Setting Meeting

Once you have activated your employees' performance development plan(s), you will need to schedule an initial goal setting meeting with each employee. 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 goals and success factors to focus on throughout the cycle, as well as any professional development opportunities that could help the employee achieve his/her peak performance. 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.*

After you have met with your direct report and finalized his/her goals for the upcoming review year, you will need to log into Perform to acknowledge the meeting and add the agreed upon goals/professional development activities/success factors to the employee's performance development plan.

1. To do this, navigate to your dashboard and view your **Tasks** (you may do so by clicking on NEOGOV in the top right corner of the screen) or use the link provided in the NEOGOV auto-generated email.

2. To mark a task as completed, click into the **Task** name from the "**My Tasks"** section of the dashboard:

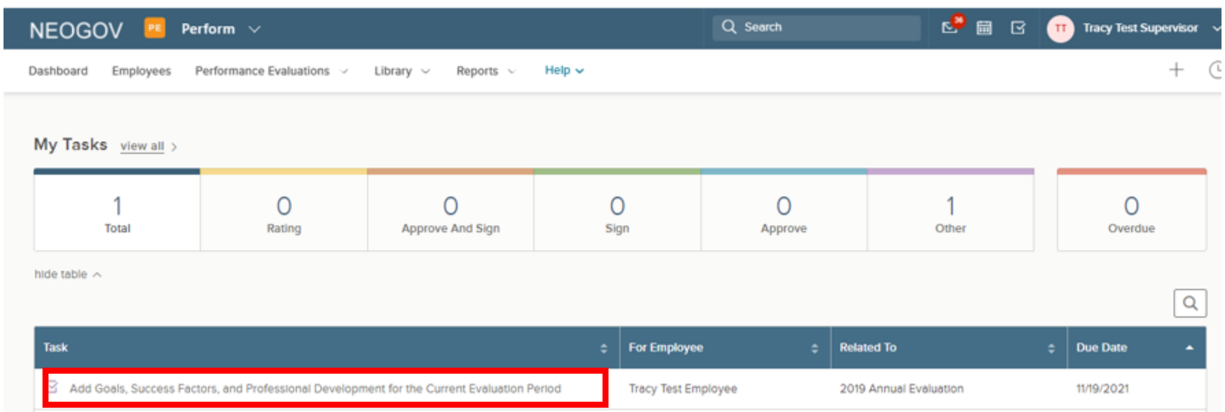


3. Click on "**Meet with employee regarding goals, professional development, and success factors"** from the list. A fly-out will appear; enter any comments you would like to note and then click, "**Complete Task**".

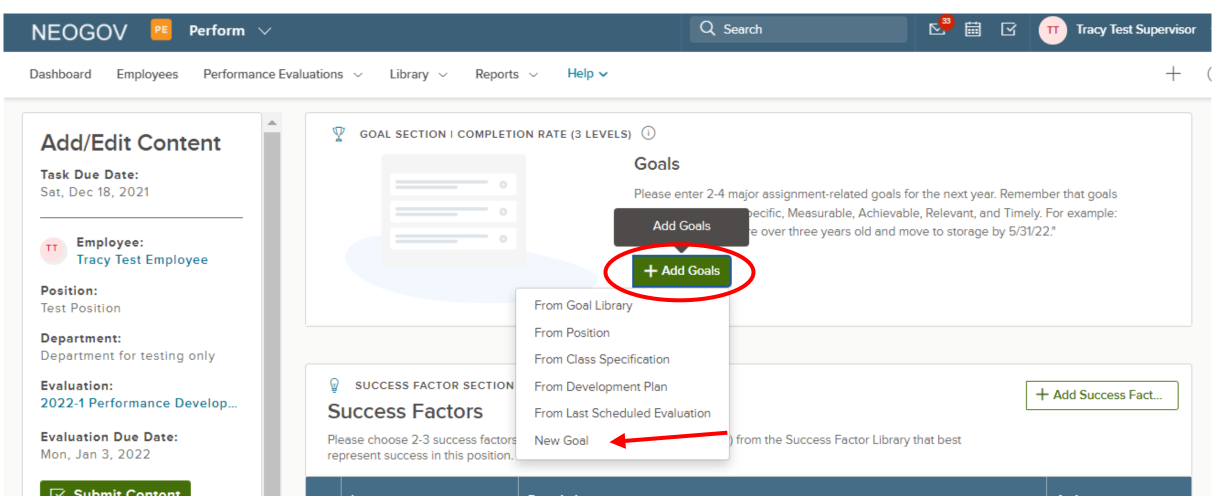
Once this is done, the task is removed from the "**Current"** task section of the dashboard and replaced with the next task which is to add your direct report's finalized goals, success factors and professional development activities to his/her performance development plan.

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

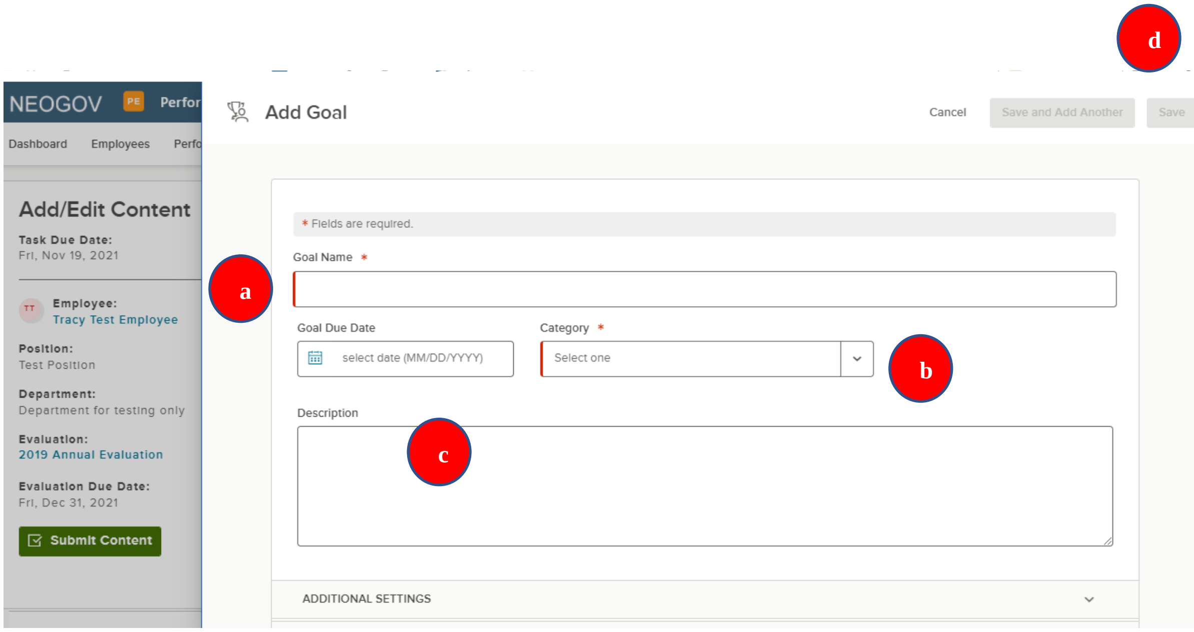
1. Navigate to your dashboard (click on NEOGOV in the upper left corner of the screen). Here, click on the task to "**Add Goals, Professional Development Goals, and Success Factors for The Current Evaluation Period"**. (Alternatively, you can click on the link provided in the auto-generated email set by NEOGOV related to this task to automatically be brought to the task, bypassing your dashboard).



2. You are re-directed to the employee's content entry page. Select "**+Add Goals", then "New Goal"** from the dropdown menu to create a new goal.

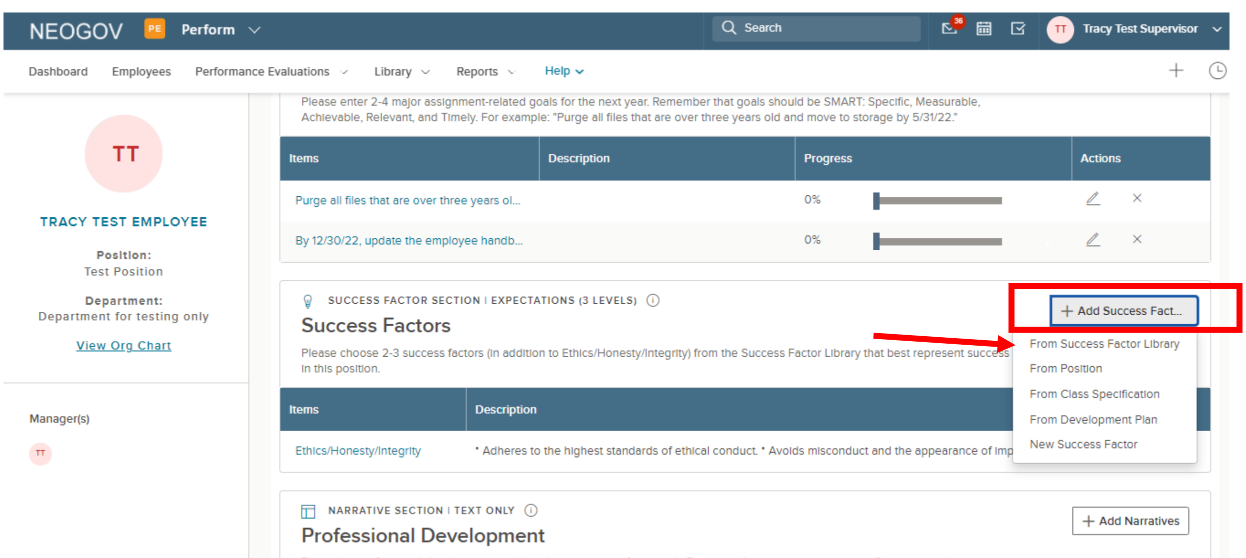


3. A fly-out appears to enter the goal details:

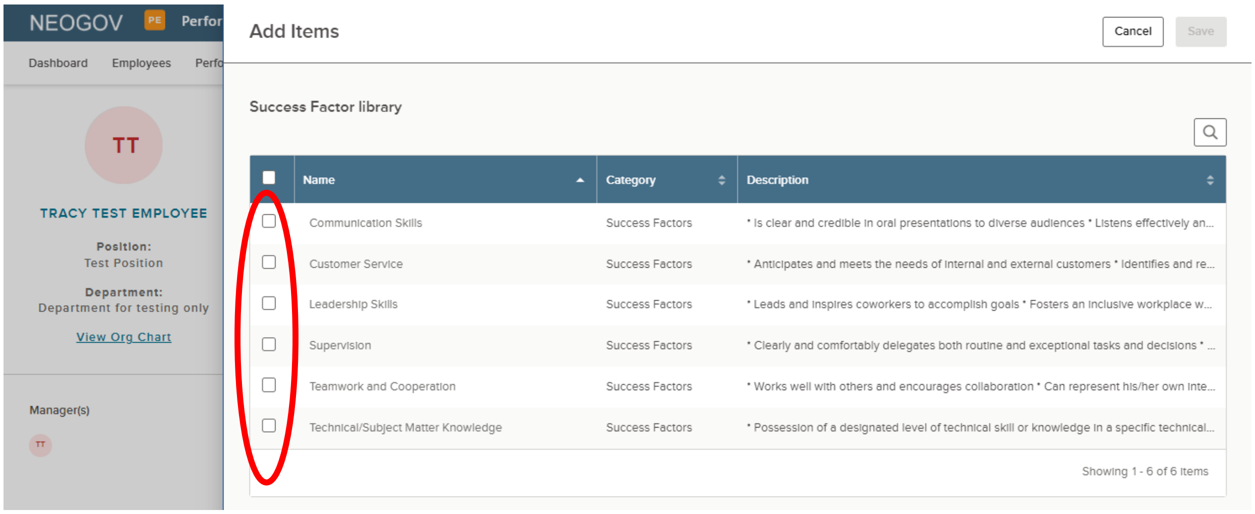


a) Enter in the **Goal Name**
b) Select **Employee Goal** for the category
c) Enter in a **Description**
d) Click, “**Save and Add Another”** until you have created the last goal. (Remember that every employee should have 2-4 SMART goals). Upon creating the last goal, instead select “**Save”**

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

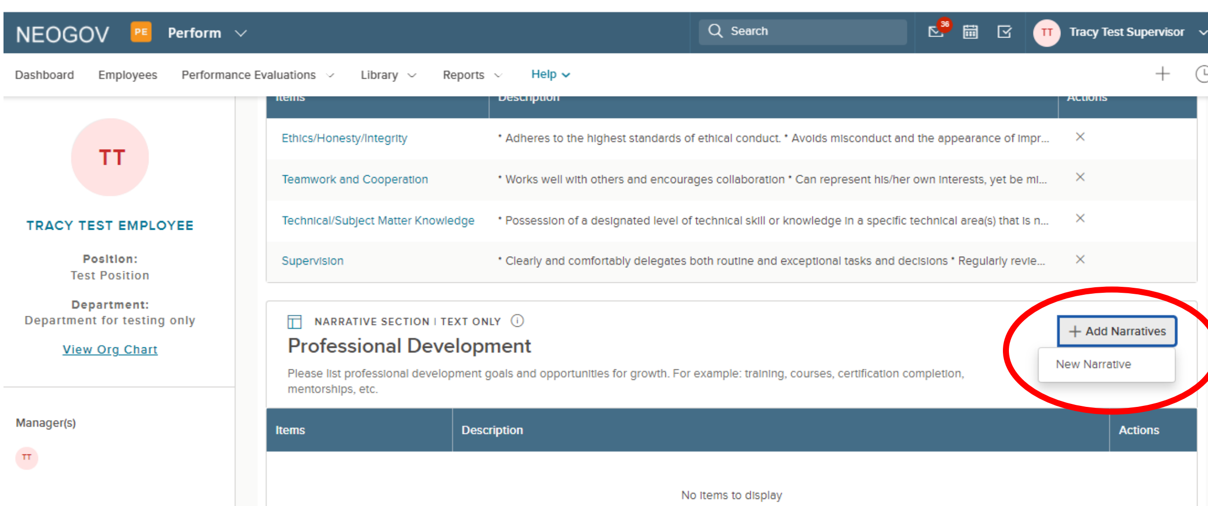


5. You will be brought to the **Success Factor Library**.

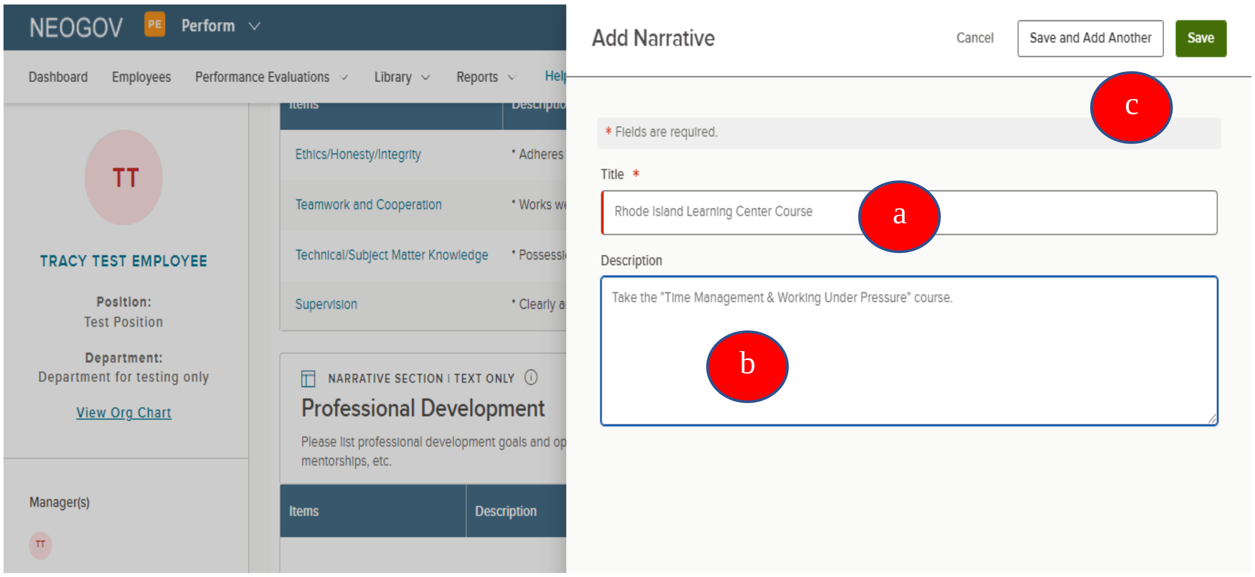


6. Select the 2-3 Success Factors you agreed upon with the employee during the initial goal setting meeting. Select "**Save"** when complete, which will return you to the employee's main performance development plan page.
   NOTE: All employees will have "Ethics/Integrity/Honesty" pre-filled in their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

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

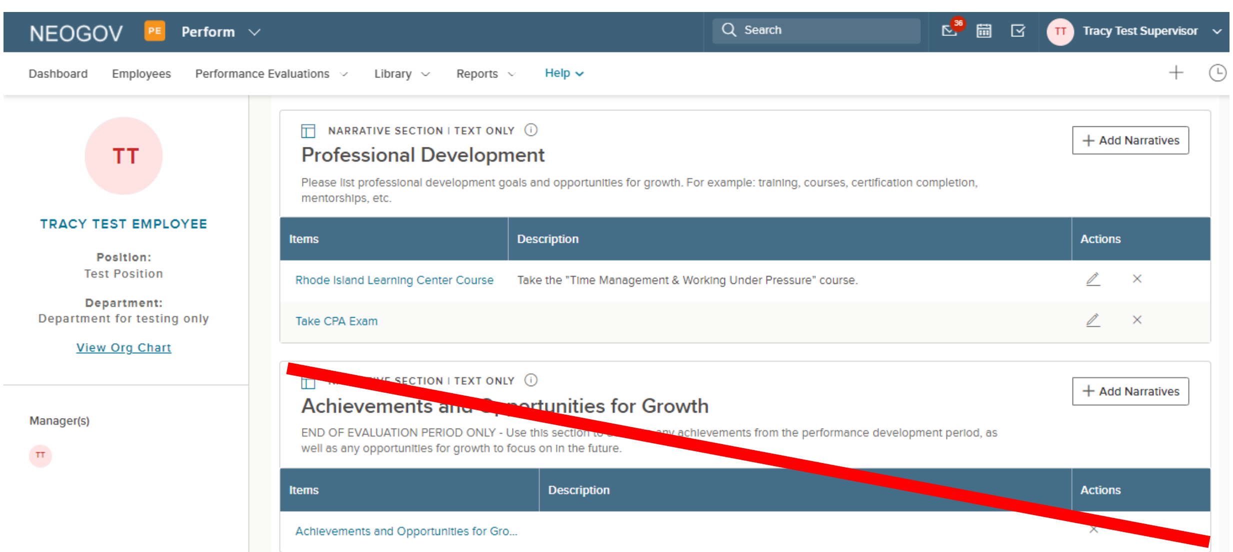


8. A fly-out will appear.
    a. Enter a **Title**
    b. Enter a **Description,** if desired
    c. Select “**Save and Add Another” until you have entered the final professional development activity.** After you have entered the final activity, select “**Save”**, which will again bring you back to the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

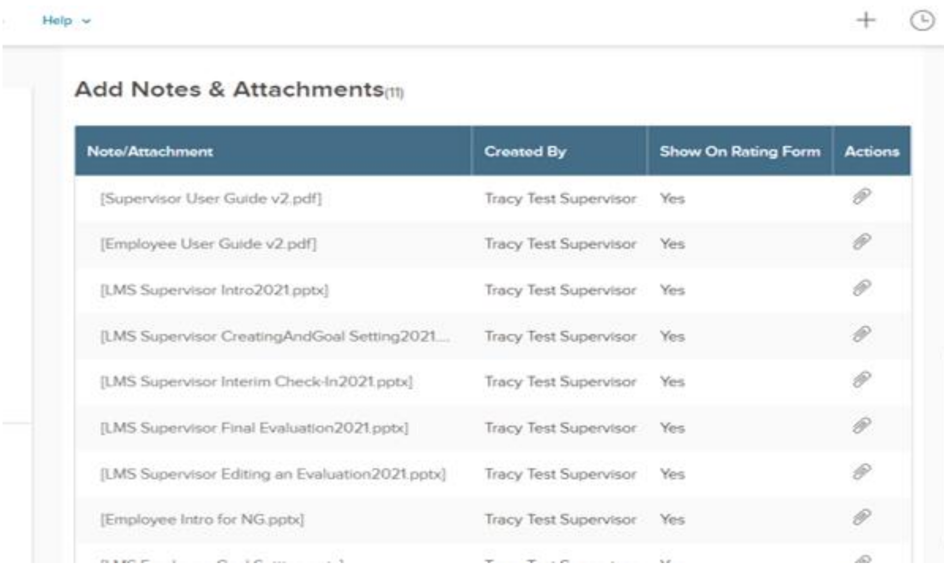


Important – Please Note:

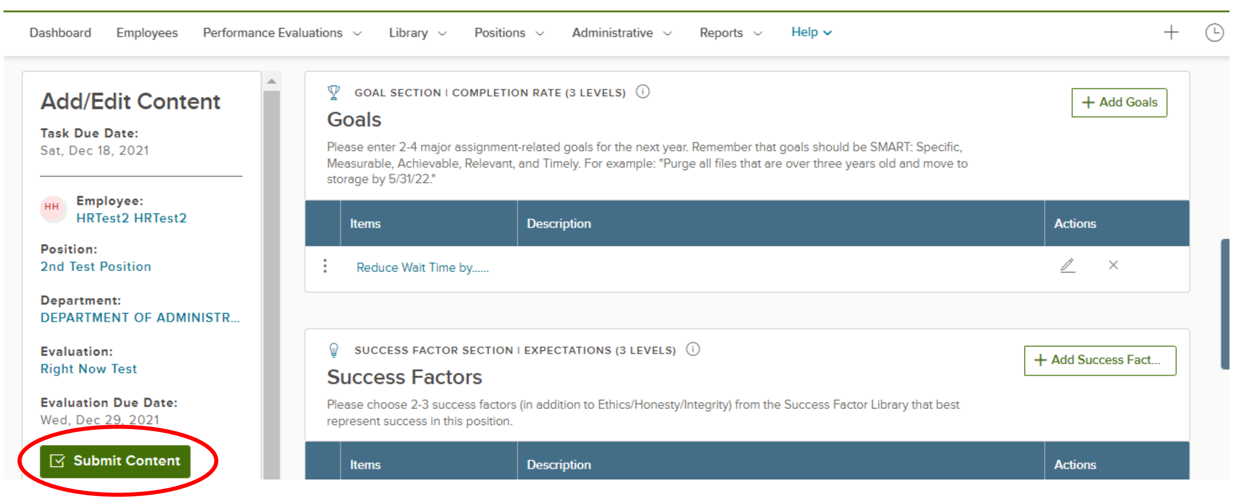
- First, you will not enter anything for the “Achievements and Opportunity for Growth” section at this time. This section will be completed during the final review phase.



- 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* (a PDF instructional guide with screenshots and step by step instructions) and narrated video tutorials for each step of the way.



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

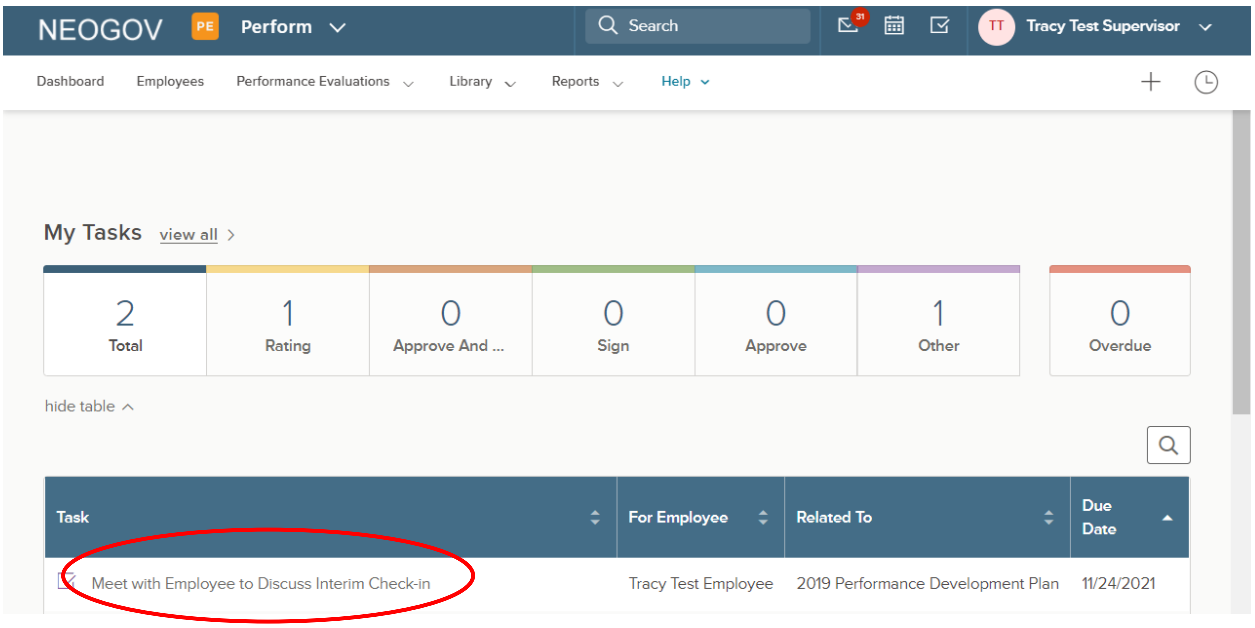


Once completed, an alert will be sent to the employee requesting acknowledgement and signature.

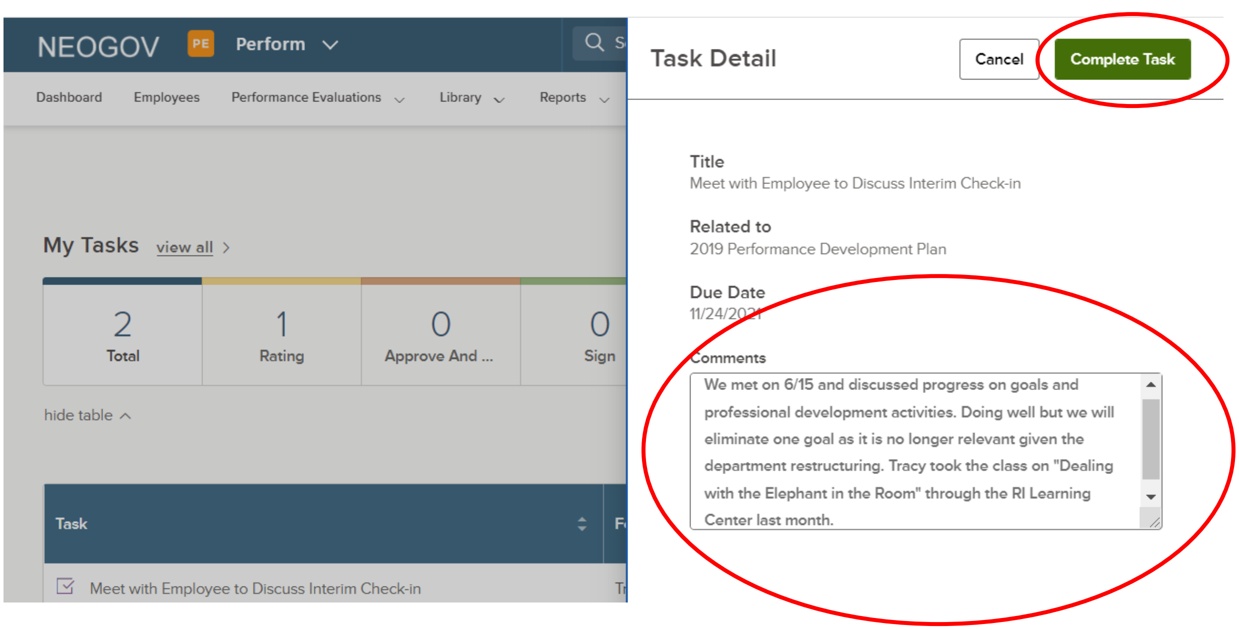
COMPLETING AN INTERIM CHECK-IN FOR YOUR DIRECT REPORTS

About halfway through the performance development cycle, you will contact your direct report to schedule a check-in meeting to discuss the progress made toward the employee's goals, success factors, and professional development. Once you have met to discuss the status of his/her goals, success factors, and professional development plan, you will need to (1) acknowledge the **meeting** in NEOGOV which is then followed by (2) completing the check-in form.

1. To mark the meeting task as completed, select "**Meet with Employee to Discuss Interim Check-in**" from the "**My Tasks"** section of the dashboard:

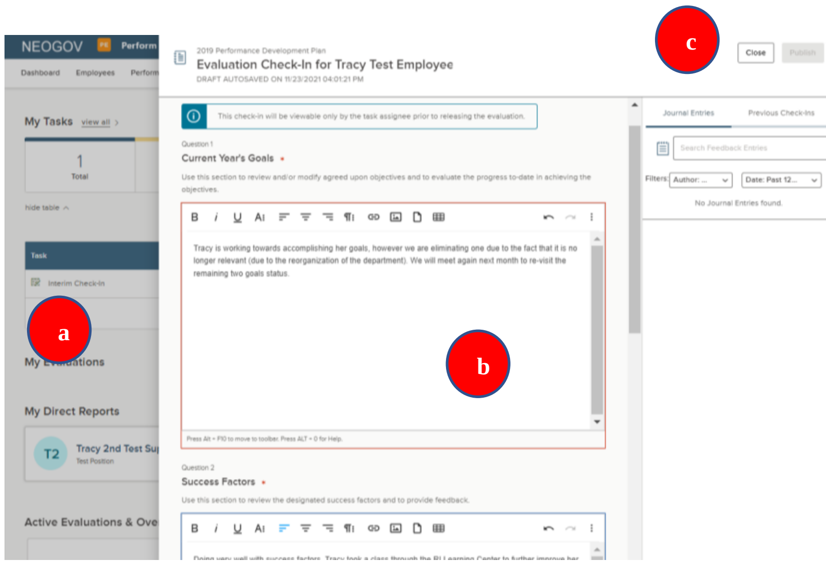


2. A fly-out will appear. Add any comments as needed and select "**Complete Task**".



After this meeting, you and the employee must complete the Interim Check-In Review Task

3. To do so, navigate to your dashboard via **NEOGOV** in the upper left-hand corner**.**
   a) Select "**Interim Check-In"** from "My Tasks"
   b) A fly-out appears with the **Check-In** questions
   c) Once you have completed all questions, select "**Publish"** in the upper right corner.

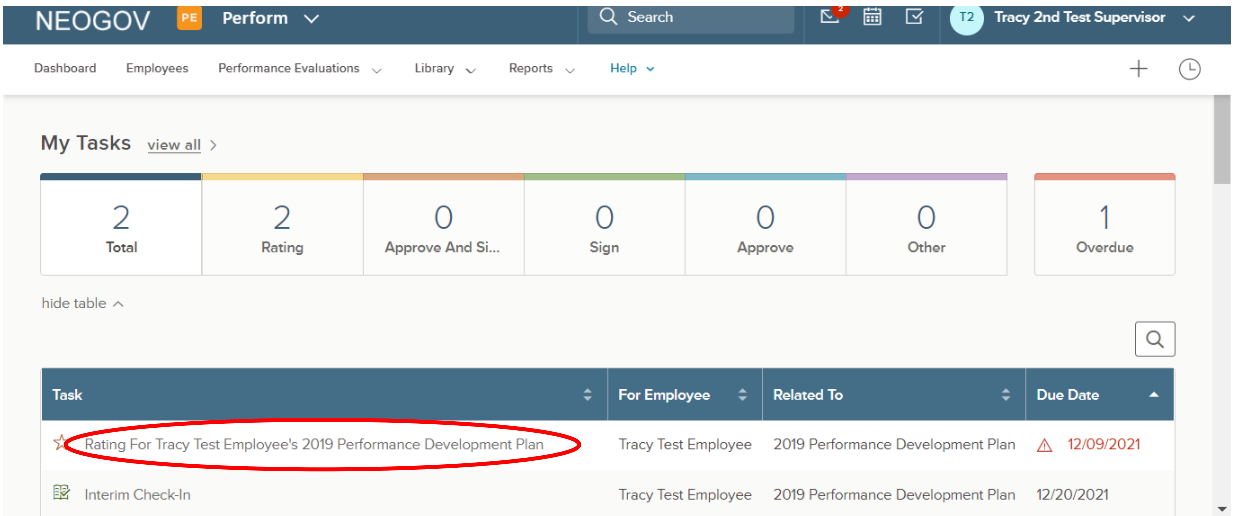


Since this is what is considered a "recurring task" (meaning it *can* happen more than once in the cycle- if you choose to do so), it stays on your dashboard. You can use this task multiple times throughout the performance development cycle if you determine more than one formal check-in is needed for the employee. Once the final rating step has begun at the end of the cycle, the check-in task disappears from your dashboard tasks.

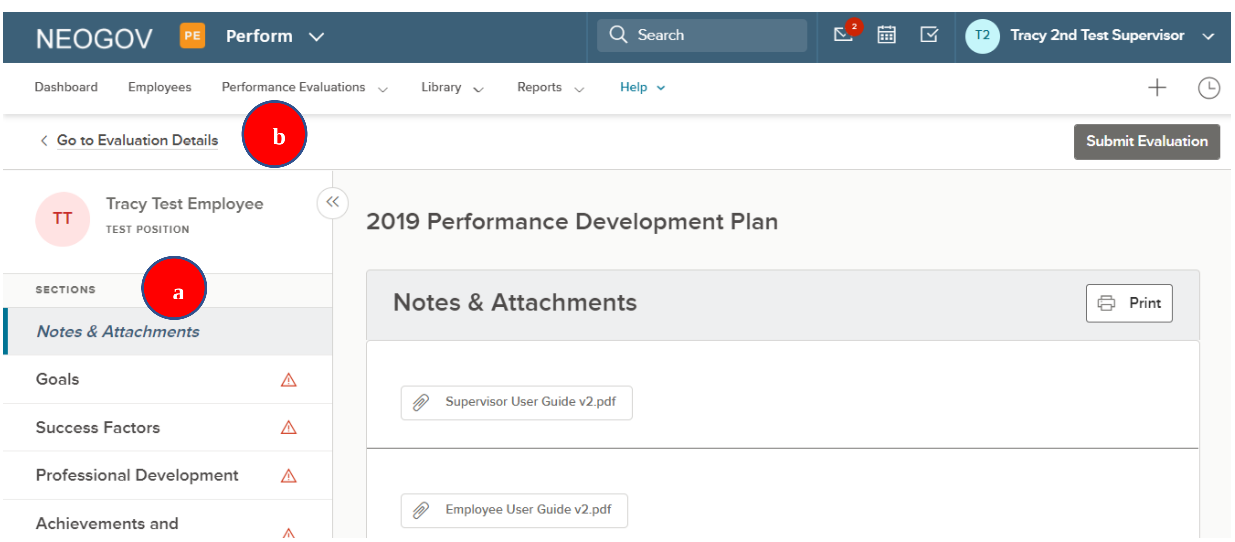
FINAL REVIEW AND FUTURE GOAL SETTING

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, you will receive notification from NEOGOV that it is time for your final review.

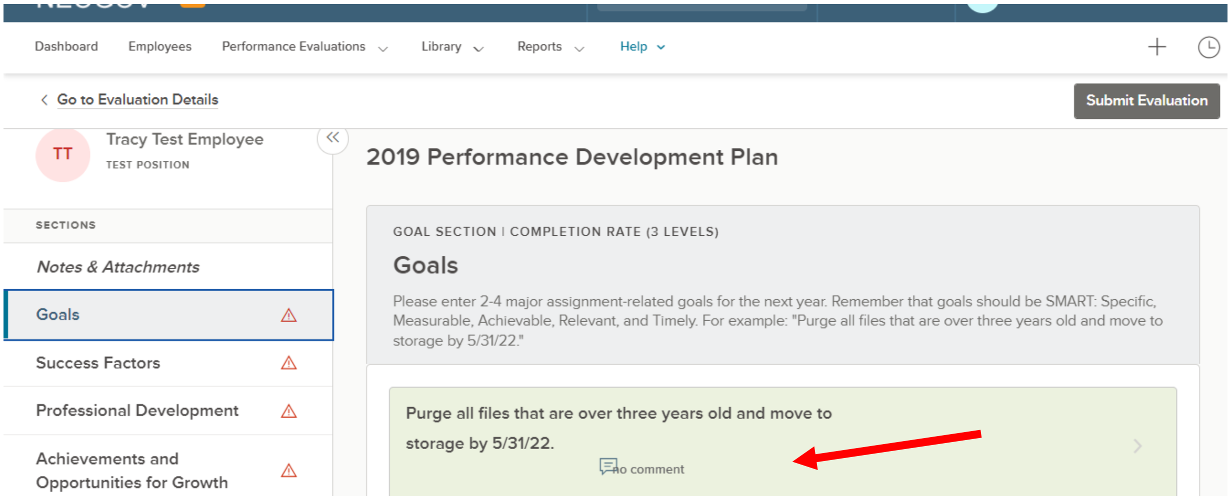
1. Navigate to your Perform dashboard or use the link provided in the notification email and click on the rating task. (Notice "Interim Check-in" is still on your dashboard; it will disappear once you complete the final rating).



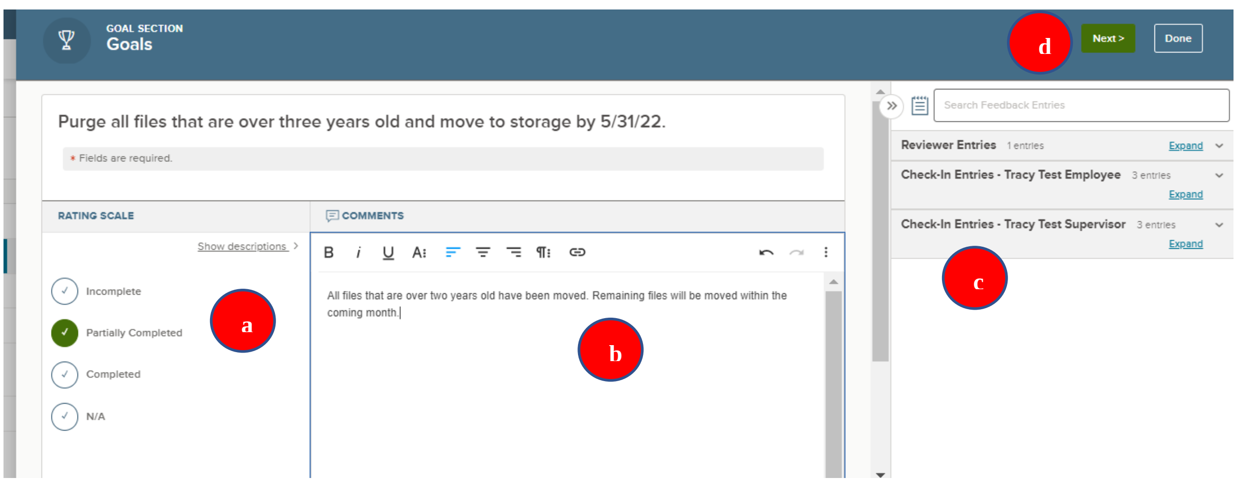
2. The link redirects to the Rating Form.
   a. To **view the contents of various sections, click the specific section name to the left**
   b. To leave the rating card and return to the" evaluation detail" page, select "**Go to Evaluation Details"**



3. To rate an item, click an item *within* a section

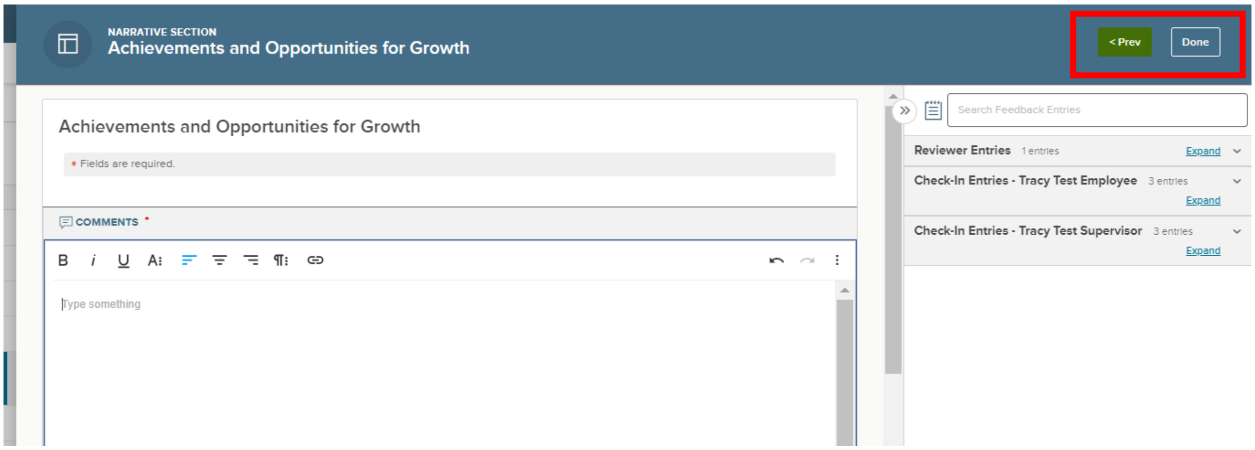


4. Upon selecting the item name to be rated, the rating card fly-out appears.

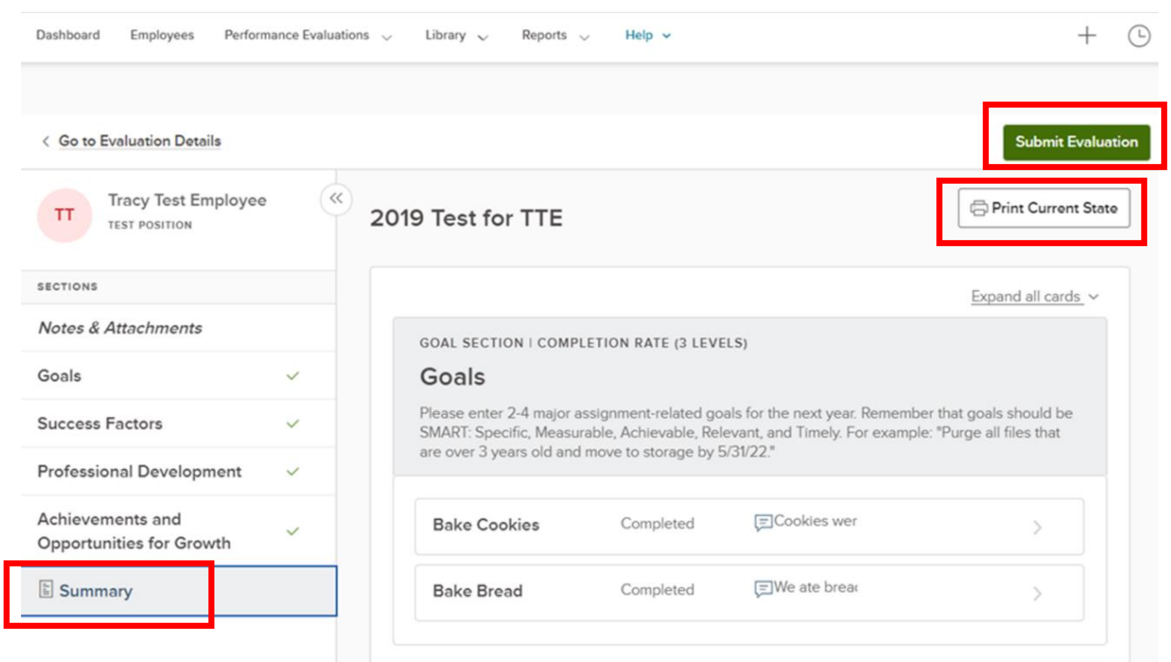


a) You see a **Rating Scale.** To view a description of each rating scale value, select the "**Show descriptions"** button and an informational flyout appears with detailed information
b) Type any text into the **Comments** box, as needed. If a comment is required, the box is highlighted in red. While 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.
c) The "**Feedback Entries"** appear on the right side of the rating card. If available, you see **Check-In Entries,** and **Reviewer Entries (direct report's self-rating)**.
d) To move to the next rating item, click "**Next"** in the top right corner.

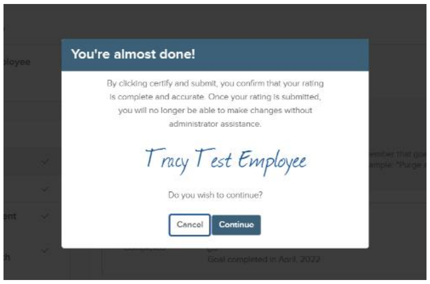
5. The final section, “**Achievements and Opportunities for Growth”**, is where you can list any achievements from the current cycle and what growth opportunities you’d like the employee to focus on moving forward to the next year.
6. Select “**Done**” when finished, or if you need to review an earlier section, select “**Previous**”

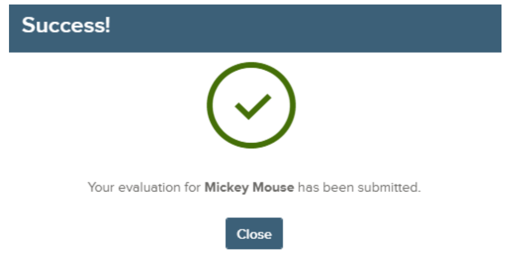


7. To print the current state of the review for your upcoming meeting with your direct report, select the “**Summary**” section, and then select “**Print Current State”.**
8. Once all required ratings and/or comments are complete, select the “**Submit Evaluation”** button in the top right corner.



9. 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”**.





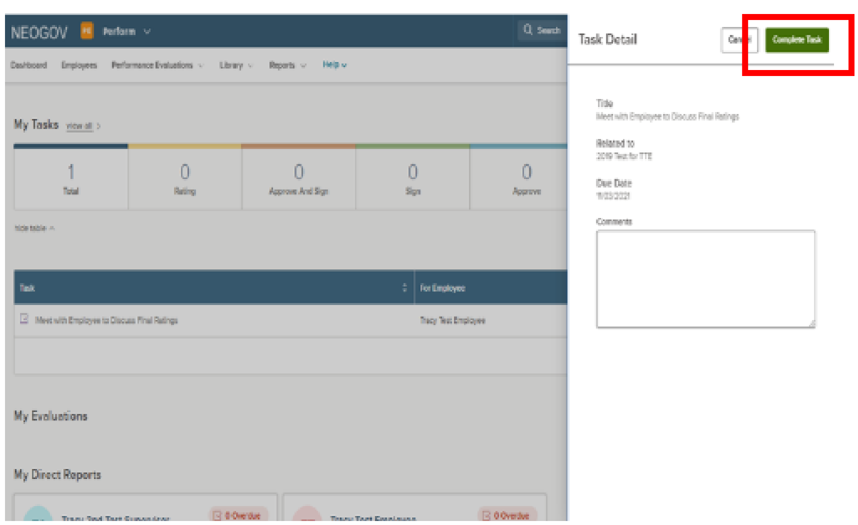
<u>Once the review has been successfully submitted, your direct report is notified. At this point, you will reach out to your direct report to schedule a review meeting.</u>

Final Review and Future Goal Setting Meeting

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

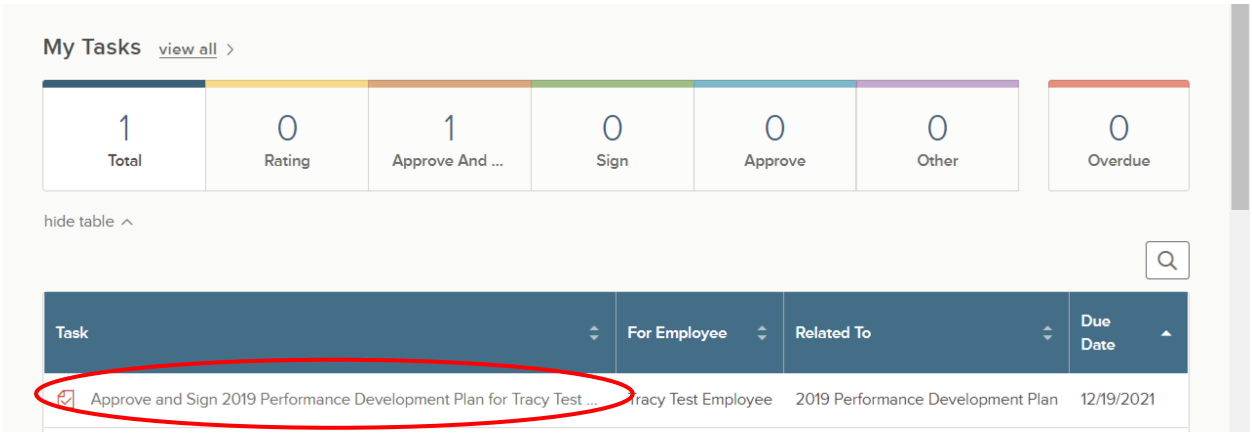
After you have met with your direct report, you will need to log into Perform to acknowledge the meeting.

1. To do this, navigate to your dashboard and view your **Tasks**.
2. Click on “**Meet with Employee to Discuss Final Ratings”** from the list.
3. A fly-out will appear. Add any comments as needed. (Notice that the “Interim Check-in is no longer on your dashboard).
4. Click “**Complete Task”**

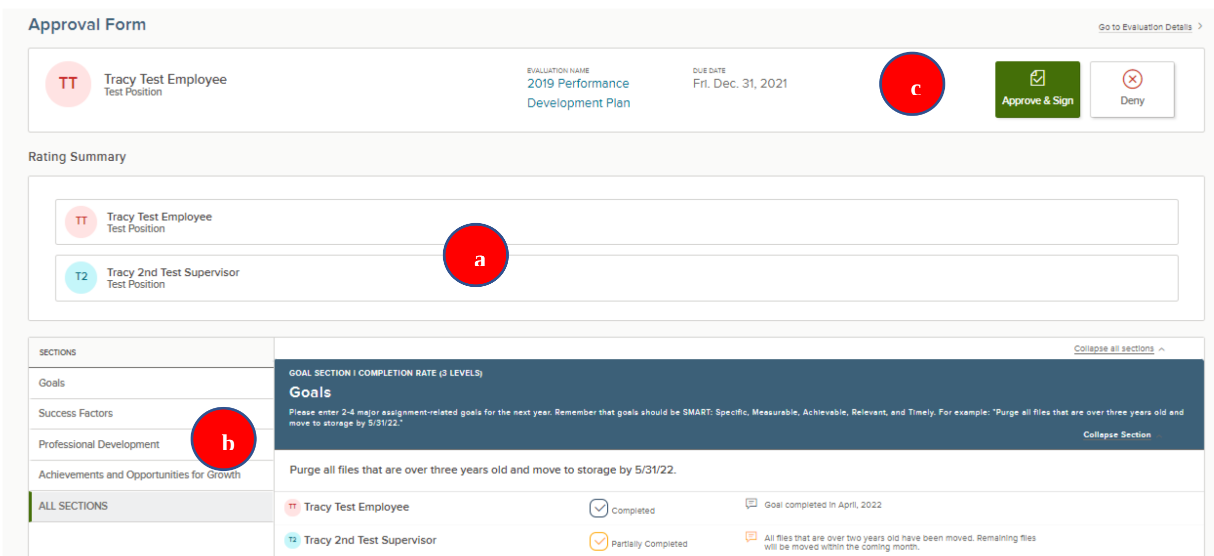


Approving and Signing – The Final Step

1. Navigate to your Dashboard. Click the **Sign** task from the task list.



2. The approval page displays.



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

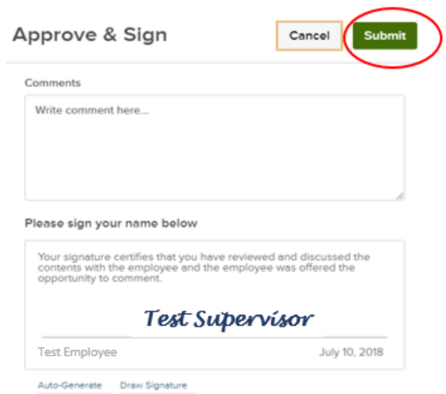
b) You can navigate through the various **Sections** by clicking on the specific section name. Otherwise, scroll through to the bottom to review the ratings and any comments that were entered during the annual cycle.

c) To make changes, select **"Deny"** to re-open the rating task. *Once denied and re-submitted, all approvals and signatures are re-triggered*. Otherwise, select "**Approve & Sign".**

TIP!

To make changes to the performance development plan you've submitted for your direct report, select "**Deny**" in the top right corner to re-open the rating task. Once it is resubmitted, all approvals and signatures are re-triggered

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



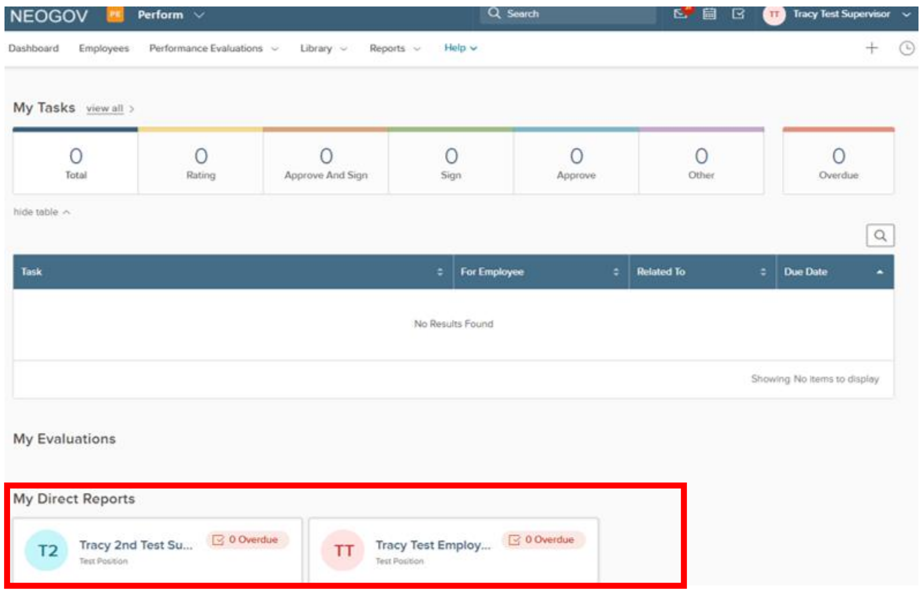
4. Enter in any comments, sign and submit. The system will create an electronic signature for you, but if you'd prefer to create your own signature with your mouse, click "Draw Signature" underneath the signature line.

Congratulations! You have now completed the very last step in the current performance development cycle and the performance development plan is archived in the NEOGOV system. 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 Perform dashboard.

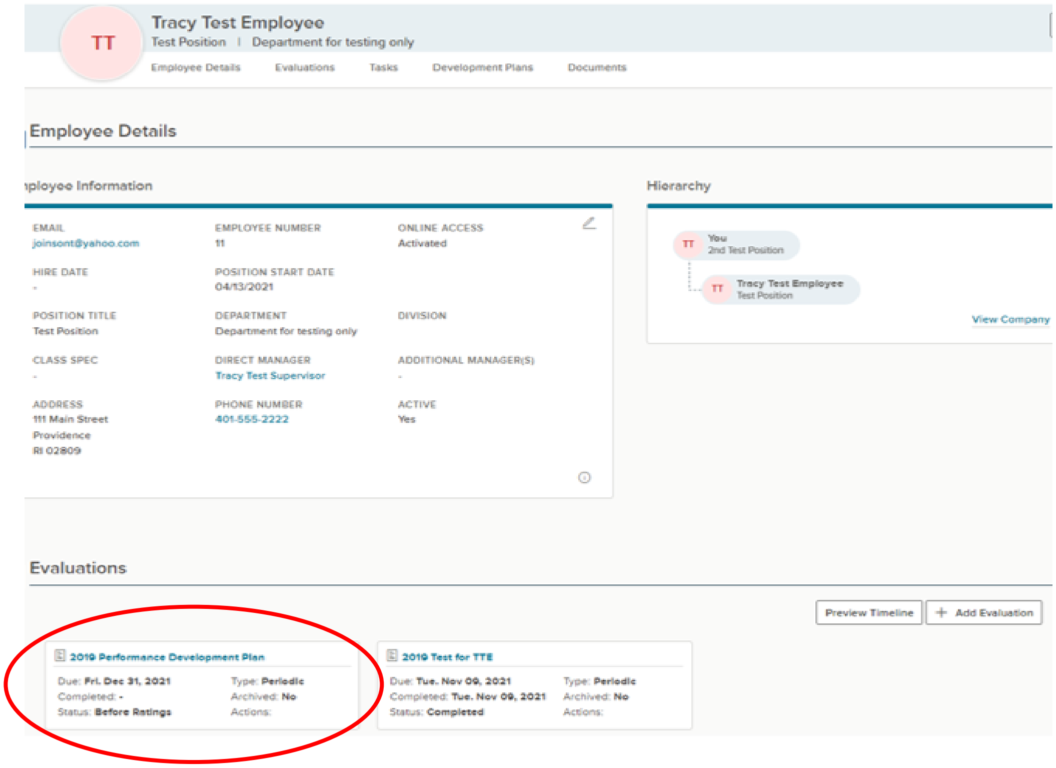
EDITING A PERFORANCE DEVELOPMENT PLAN

Occasionally, and employee's goals, success factors, and/or professional development 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.

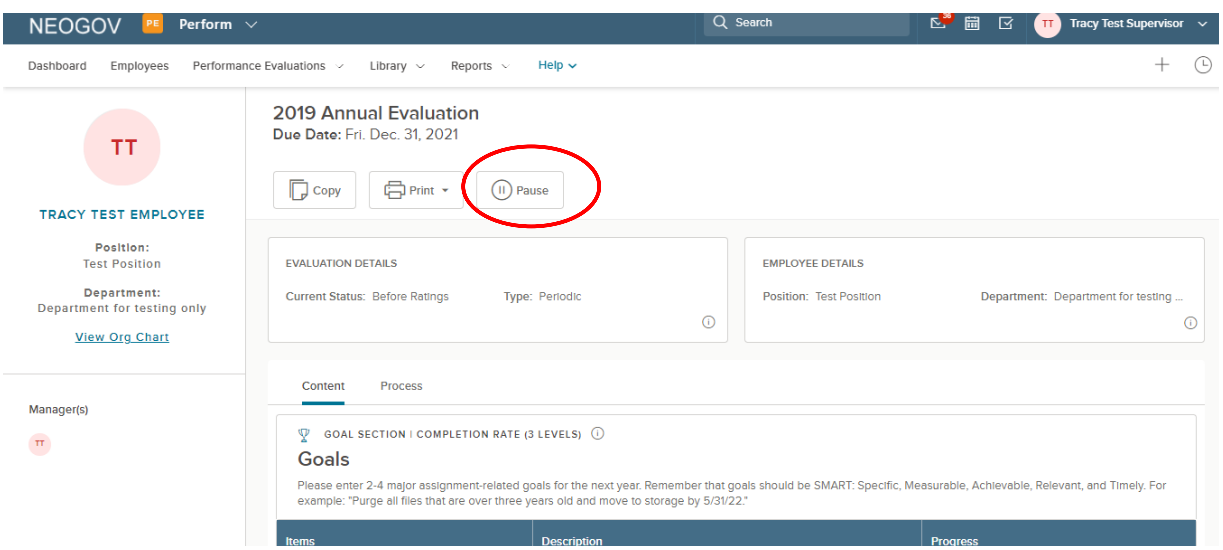
1. To do so, navigate to your Perform dashboard and click on the employee's name under "**My Direct Reports**".



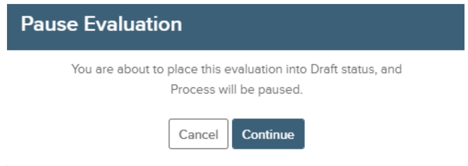
2. Click on the current performance development plan under “**Evaluations”** in the employee’s profile.



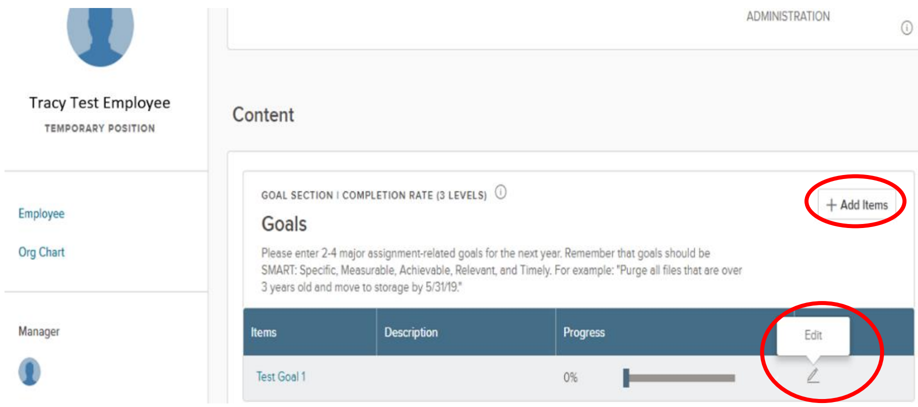
3. To edit the performance development plan, you will need to put it into a **Draft** status. To do so, click “**Pause”**.



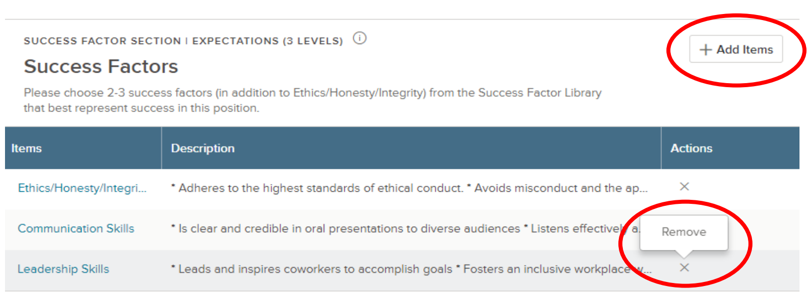
4. Click “**Continue”** on the pop-up screen:



5. To add goals, you can follow the original “Adding Goals” process.
   To edit *existing* goals, click on the pencil icon to the right of the goal, edit the content, and click “**Save”**.

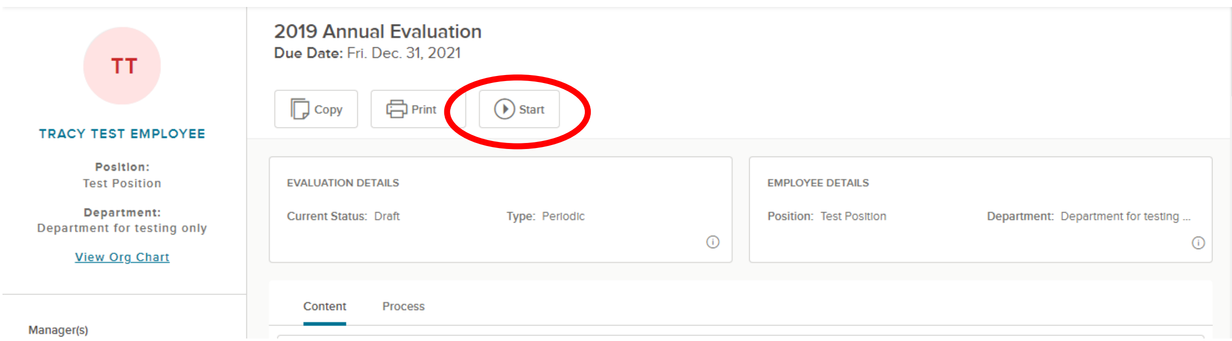


6. To add Success Factors, follow the steps listed above. To remove, click on the “X” to the right of the success factor. ***NOTE***: *Ethics/Honesty/Integrity is required for all employees. You may not remove that success factor from any employee’s evaluation.*



IMPORTANT

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



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