

NEOGOV PERFORM: SUPERVISOR USER GUIDE



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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.

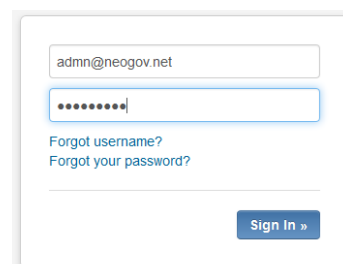
Before You Use This Guide

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**:



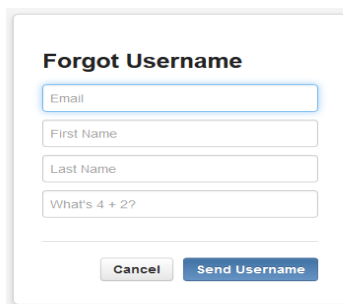
The login form contains two input fields: the first for the username (pre-filled with 'admin@neogov.net') and the second for the password (masked with dots). Below the password field are two links: 'Forgot username?' and 'Forgot your password?'. At the bottom right is a blue button labeled 'Sign In »'.

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.



The 'Password Reset' form has 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.



The 'Forgot Username' form has 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 products, such as Onboard, may also use the module menu to toggle to Perform as the username / password combination is consistent across modules.



The module menu shows the 'NEOGOV' logo at the top. Below it, there's a 'Class' dropdown and a 'Perform' button highlighted with a red box. Other visible buttons include 'Onboard', 'SalaryStudy', 'Reports', and 'CandidateT'. There's also a 'My HR' section with 'Job Post' and 'Job #' links, and an 'Active' dropdown.

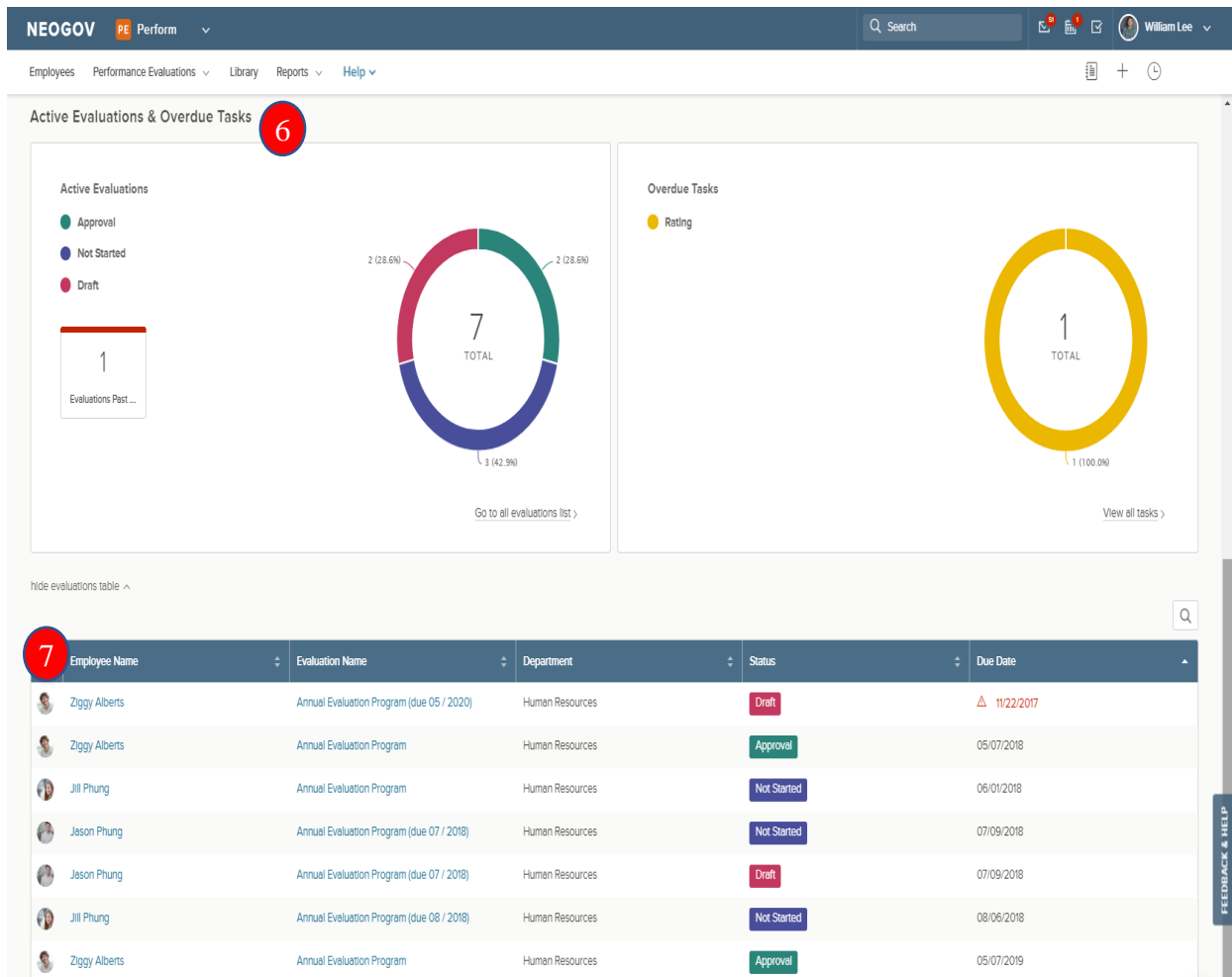
NEOGOV OVERVIEW

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.**

The screenshot shows the NEOGOV Perform dashboard interface. At the top is a dark blue header bar with the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and user information for Tracy Joinson. Below the header is a navigation menu with tabs: Dashboard, Employees, Performance Evaluations, Library, Positions, Administrative, and Reports. The main content area is divided into several sections. The 'My Tasks' section features a row of seven color-coded boxes representing different task types: Total, Rating, Approve And Sign, Sign, Approve, Other, and Overdue. Below this is a table with columns for Task, For Employee, Related To, and Due Date, which currently shows 'No Results Found'. The 'My Evaluations' section displays a card for the '2019 ANNUAL PERFORMANCE EVALUATION' with due and completion dates. The 'My Direct Reports' section shows two cards for direct reports: 'HRTes2 HRTes2' and 'newhire3 newhire3', both with '0 Overdue' status. Red circles with numbers 1 through 5 are overlaid on the image to highlight specific features: 1 points to the Reports tab, 2 points to the 'view all' link in My Tasks, 3 points to the 'view all of my evaluations' link, 4 points to the My Direct Reports section, and 5 points to the user profile icon in the top right.

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



- 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
- 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.

My Tasks [view all](#) 1

4 **Total** 2 **Rating** 0 **Approve And Sign** 0 **Sign** 0 **Approve** 2 **Other** 2 **Overdue**

hide table [~](#) a b c d e f [Q](#)

Task 2	For Employee	Related To	Due Date
★ Rating For Libby Te's L. Te - Probation Review	Libby Te	L. Te - Probation Review	⚠ 07/18/2017
☑ Check in with Ziggy	William Lee	N/A	⚠ 11/14/2017
☑ Review, Add and/or Edit Goals	Jason Phung	Annual Evaluation Program (due 07 / 2018)	11/25/2017
🔍 Answer check-in question	Jason Phung	Annual Evaluation Program (due 07 / 2018)	12/04/2017

1 - 4 of 4 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 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.

The screenshot shows the NEOGOV dashboard with the 'My Tasks' section highlighted. A task titled 'Evaluation Check-In for Tracy Test Employee' is selected. The task details include a 'Current Year's Goals' section with a text editor. A red circle '1' is placed over the 'Interim Check-In' task in the 'My Tasks' list. A red circle '2' is placed over the text editor area. A red circle '3' is placed over the 'Publish' button in the top right corner.

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 all”** 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.


The screenshot shows the 'My Evaluations' section with a 'view all of my evaluations' link circled in red. Below the link are two evaluation cards: 'Annual Performance Evaluation' (Due: Thu, Mar 01, 2018, Status: Not Started) and '2017 Performance Evaluation' (Due: Thu, Mar 09, 2017, Status: Completed).

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.

My Direct Reports






Ziggy Alberts
Human Resources Assistant

 0
 0





Jill Phung
Human Resources Assistant

 0
 0



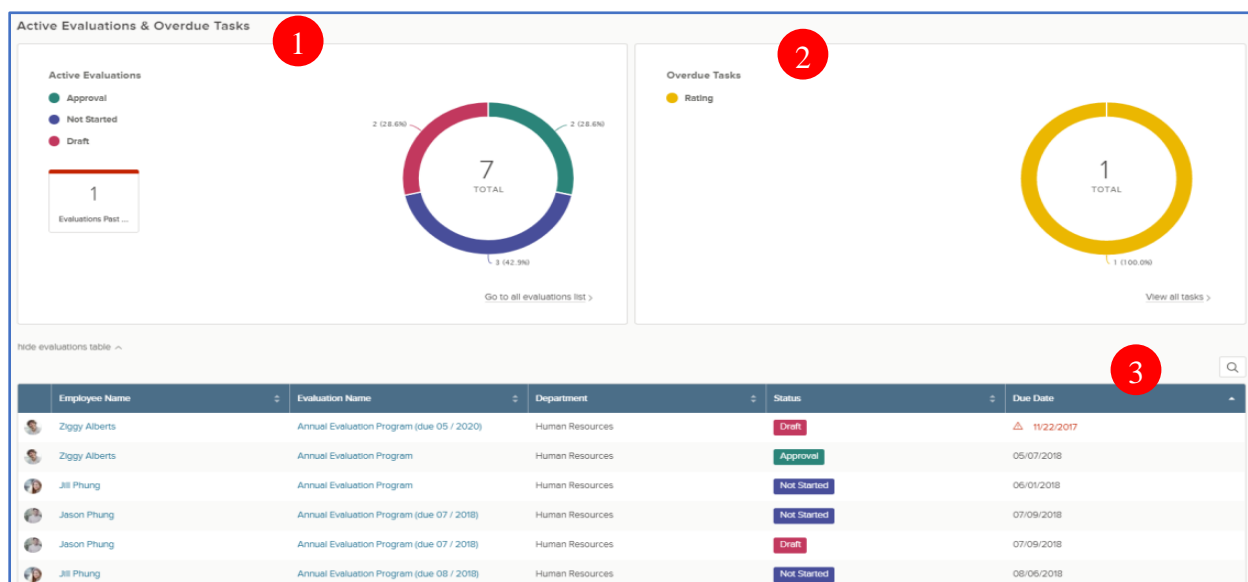
Jason Phung
Human Resources Manager

 2
 2

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**”.



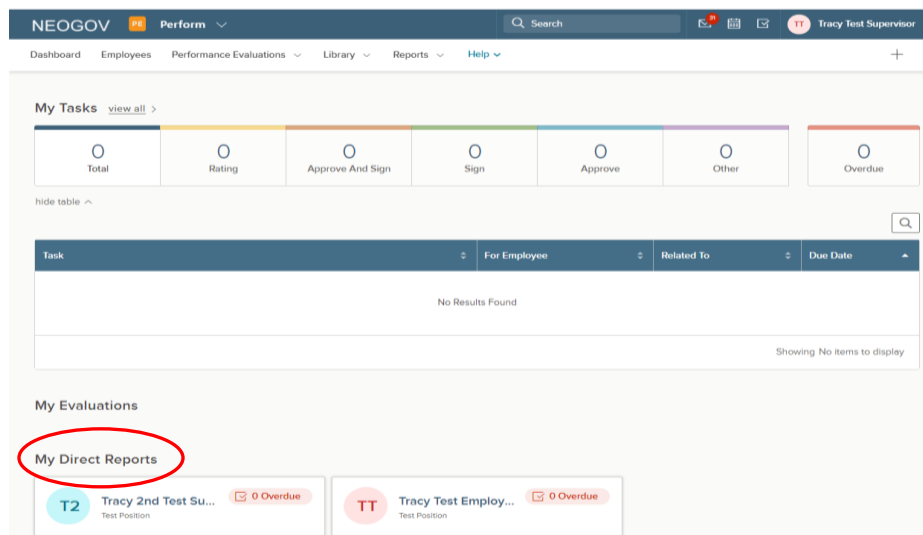
1. The “**Active Evaluation Graph**” is divided by four statuses: *Approval*, *Rating*, *Not Started*, and *Draft*. Click on any respective part of the graph to filter the list below.
2. The “**Overdue Tasks**” graph displays the number of overdue tasks divided by the four statuses. Select the graph 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

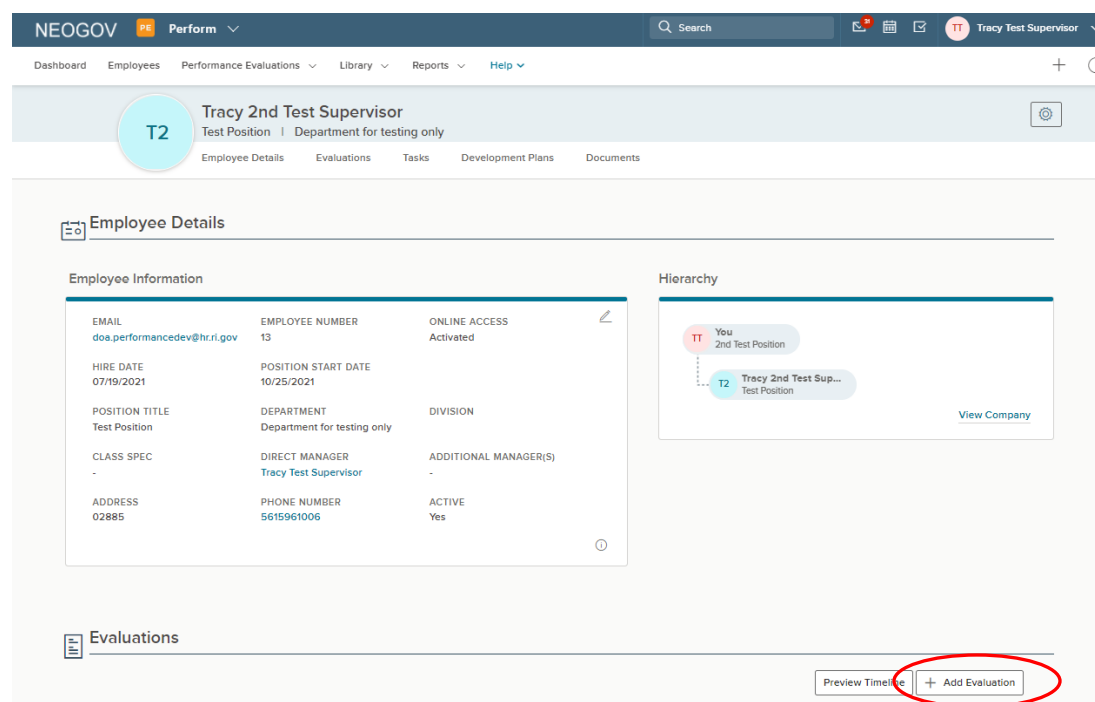
At the beginning of the performance development cycle, you will log into NEOGOV and activate your employees' performance development plan(s).

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**”.



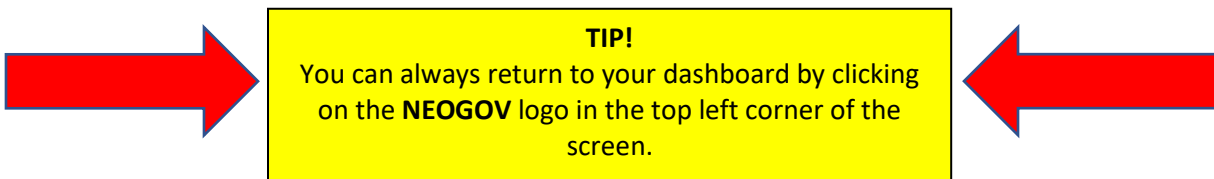
The Evaluation Creator page appears.

The screenshot shows the 'Evaluation Creator' page in the NEOGOV system. The top navigation bar includes 'NEOGOV', 'PE', 'Perform', a search bar, and user information 'Tracy Test Supervisor'. The main content area is titled 'Evaluation Creator' and 'General Settings'. A message at the top states '* Fields are required.' The form includes the following fields and options:

- Name ***: A text input field containing '2022 Performance Development Plan' (labeled 'a').
- Evaluation Options**: Radio buttons for 'Next Scheduled' and 'Custom' (labeled 'b').
- Employee**: A text input field containing 'Tracy 2nd Test Supervisor'.
- Evaluation Type**: Radio buttons for 'Periodic' (labeled 'c') and 'Probation'.
- Due Date ***: A date picker field showing '12/31/2022' (labeled 'd').
- Program ***: A dropdown menu showing '2022 Performance Development Program' (labeled 'e').
- Generate Preview**: A button at the bottom right (labeled 'f').

- 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.



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:

NEOGOV PE Perform

Dashboard Employees Performance Evaluations Library Reports Help

My Tasks [view all](#)

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

hide table

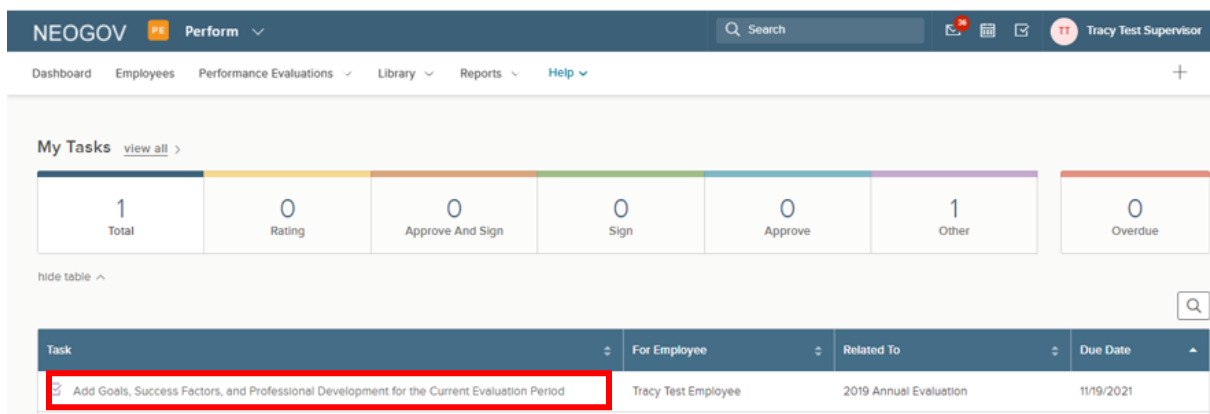
Task	For Employee
<input checked="" type="checkbox"/> Meet with Employee Regarding Goals, Professional Development, and Success Factors	Tracy Test Employee

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**”.

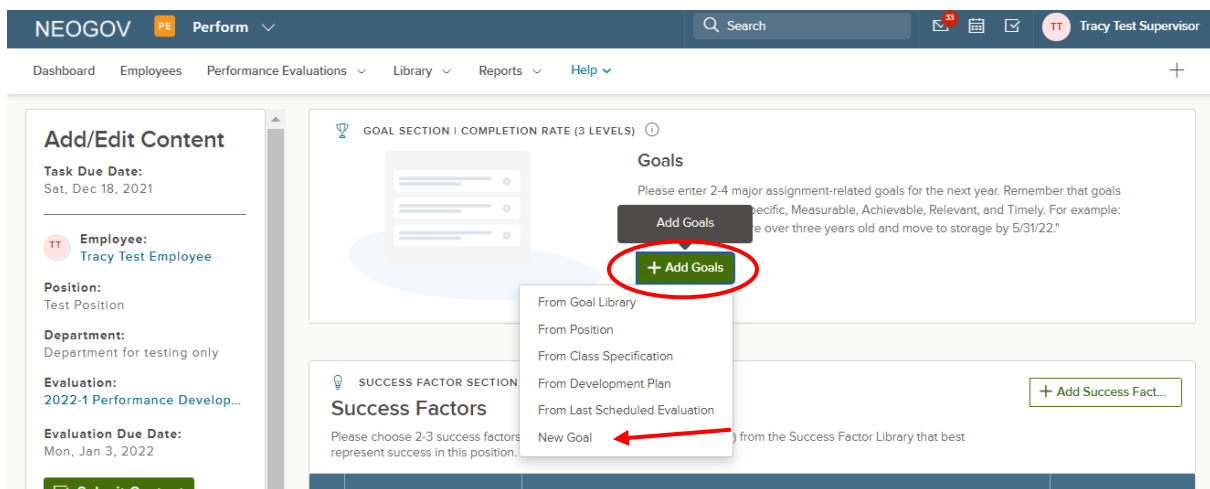
Once this is done, the task is removed from the “**Current**” task section of the dashboard and replaced with the next task which is to add your direct report’s finalized goals, success factors and professional development activities to his/her performance development plan.

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**.

NEO GOV PE Perform

Dashboard Employees Performance Evaluations Library Reports Help

TT

TRACY TEST EMPLOYEE

Position: Test Position

Department: Department for testing only

[View Org Chart](#)

Manager(s)

TT

Add Items

Cancel Save

Success Factor library

	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...

Showing 1 - 6 of 6 items

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”**.

NEO GOV PE Perform

Dashboard Employees Performance Evaluations Library Reports Help

TT

TRACY TEST EMPLOYEE

Position: Test Position

Department: Department for testing only

[View Org Chart](#)

Manager(s)

TT

Items

Items	Description	Actions
Ethics/Honesty/Integrity	* Adheres to the highest standards of ethical conduct. * Avoids misconduct and the appearance of Impr...	X
Teamwork and Cooperation	* Works well with others and encourages collaboration * Can represent his/her own interests, yet be mi...	X
Technical/Subject Matter Knowledge	* Possession of a designated level of technical skill or knowledge in a specific technical area(s) that is n...	X
Supervision	* Clearly and comfortably delegates both routine and exceptional tasks and decisions * Regularly revie...	X

NARRATIVE SECTION | TEXT ONLY ⓘ

Professional Development

Please list professional development goals and opportunities for growth. For example: training, courses, certification completion, mentorships, etc.

+ Add Narratives

New Narrative

No items to display

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.

NEO GOV PE Perform

Dashboard Employees Performance Evaluations Library Reports Help

TT

TRACY TEST EMPLOYEE

Position: Test Position

Department: Department for testing only

[View Org Chart](#)

Manager(s)

TT

Items Description

Ethics/Honesty/Integrity * Adheres

Teamwork and Cooperation * Works w

Technical/Subject Matter Knowledge * Possessi

Supervision * Clearly e

NARRATIVE SECTION | TEXT ONLY

Professional Development

Please list professional development goals and opportunities for growth, etc.

Items Description

Add Narrative

Cancel Save and Add Another Save

* Fields are required.

Title *

Rhode Island Learning Center Course

Description

Take the "Time Management & Working Under Pressure" course.

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.

NEO GOV PE Perform

Search

Tracy Test Supervisor

Dashboard Employees Performance Evaluations Library Reports Help

TT

TRACY TEST EMPLOYEE

Position: Test Position

Department: Department for testing only

[View Org Chart](#)

Manager(s)

TT

NARRATIVE SECTION | TEXT ONLY

Professional Development

Please list professional development goals and opportunities for growth. For example: training, courses, certification completion, mentorships, etc.

+ Add Narratives

Items	Description	Actions
Rhode Island Learning Center Course	Take the "Time Management & Working Under Pressure" course.	Edit Delete
Take CPA Exam		Edit Delete

NARRATIVE SECTION | TEXT ONLY

Achievements and Opportunities for Growth

END OF EVALUATION PERIOD ONLY - Use this section to list any achievements from the performance development period, as well as any opportunities for growth to focus on in the future.

+ Add Narratives

Achievements and Opportunities for Gro...

- 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.

Help ▾

+

🕒

Add Notes & Attachments⁽¹¹⁾

Note/Attachment	Created By	Show On Rating Form	Actions
[Supervisor User Guide v2.pdf]	Tracy Test Supervisor	Yes	
[Employee User Guide v2.pdf]	Tracy Test Supervisor	Yes	
[LMS Supervisor Intro2021.pptx]	Tracy Test Supervisor	Yes	
[LMS Supervisor CreatingAndGoal Setting2021...	Tracy Test Supervisor	Yes	
[LMS Supervisor Interim Check-In2021.pptx]	Tracy Test Supervisor	Yes	
[LMS Supervisor Final Evaluation2021.pptx]	Tracy Test Supervisor	Yes	
[LMS Supervisor Editing an Evaluation2021.pptx]	Tracy Test Supervisor	Yes	
[Employee Intro for NG.pptx]	Tracy Test Supervisor	Yes	

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.

Dashboard Employees Performance Evaluations ▾ Library ▾ Positions ▾ Administrative ▾ Reports ▾ Help ▾

+

🕒

Add/Edit Content

Task Due Date:
Sat, Dec 18, 2021

Employee:
HRTes2 HRTes2

Position:
2nd Test Position

Department:
DEPARTMENT OF ADMINISTR...

Evaluation:
Right Now Test

Evaluation Due Date:
Wed, Dec 29, 2021

☒ **Submit Content**

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."

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

[+ Add Goals](#)

SUCCESS FACTOR SECTION | EXPECTATIONS (3 LEVELS) ⓘ

Success Factors

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
-------	-------------	---------

[+ Add Success Fact...](#)

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:

The screenshot shows the NEOGOV dashboard for a user named Tracy Test Supervisor. The 'My Tasks' section displays a summary of tasks: 2 Total, 1 Rating, 0 Approve And ..., 0 Sign, 0 Approve, 1 Other, and 0 Overdue. Below this is a table of tasks. The first task, 'Meet with Employee to Discuss Interim Check-in', is circled in red. It is assigned to Tracy Test Employee, related to the 2019 Performance Development Plan, and has a due date of 11/24/2021.

Task	For Employee	Related To	Due Date
Meet with Employee to Discuss Interim Check-in	Tracy Test Employee	2019 Performance Development Plan	11/24/2021

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

The screenshot shows the 'Task Detail' fly-out for the task 'Meet with Employee to Discuss Interim Check-in'. The 'Complete Task' button is circled in red. The 'Comments' section is also circled in red and contains the following text: 'We met on 6/15 and discussed progress on goals and professional development activities. Doing well but we will eliminate one goal as it is no longer relevant given the department restructuring. Tracy took the class on "Dealing with the Elephant in the Room" through the RI Learning Center last month.'

Task Detail

Title
Meet with Employee to Discuss Interim Check-in

Related to
2019 Performance Development Plan

Due Date
11/24/2021

Comments
We met on 6/15 and discussed progress on goals and professional development activities. Doing well but we will eliminate one goal as it is no longer relevant given the department restructuring. Tracy took the class on "Dealing with the Elephant in the Room" through the RI Learning Center last month.

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.

The screenshot displays the NEOGOV Performance Development Plan interface. On the left sidebar, under 'My Tasks', the 'Interim Check-In' task is highlighted with a red circle labeled 'a'. The main content area shows the 'Evaluation Check-In for Tracy Test Employee' form, which is a draft autosaved on 11/23/2021 at 04:01:21 PM. The form includes a 'Current Year's Goals' section with a text area for feedback, where the text 'Tracy is working towards accomplishing her goals, however we are eliminating one due to the fact that it is no longer relevant (due to the reorganization of the department). We will meet again next month to re-visit the remaining two goals status.' is entered. This text area is highlighted with a red circle labeled 'b'. The form also includes a 'Success Factors' section. On the right side of the form, there is a 'Publish' button highlighted with a red circle labeled 'c'. The interface also shows a 'Journal Entries' section on the right with a search bar and filters.

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).

The screenshot shows the NEOGOV Perform dashboard. The top navigation bar includes 'NEOGOV', 'PE', 'Perform', a search bar, and user information 'T2 Tracy 2nd Test Supervisor'. Below the navigation bar, there are tabs for 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main content area is titled 'My Tasks' and features a summary of tasks: 2 Total, 2 Rating, 0 Approve And Si..., 0 Sign, 0 Approve, 0 Other, and 1 Overdue. Below this, a table lists tasks with columns: Task, For Employee, Related To, and Due Date. The first task, 'Rating For Tracy Test Employee's 2019 Performance Development Plan', is circled in red. The second task is 'Interim Check-In'.

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	12/20/2021

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”

The screenshot shows the '2019 Performance Development Plan' page. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there is a 'Go to Evaluation Details' link (labeled 'b') and a 'Submit Evaluation' button. The main content area is titled '2019 Performance Development Plan' and features a 'Notes & Attachments' section. On the left, there is a sidebar with 'SECTIONS' and a list of sections: 'Notes & Attachments' (labeled 'a'), 'Goals', 'Success Factors', 'Professional Development', and 'Achievements and'. The 'Notes & Attachments' section contains two attachments: 'Supervisor User Guide v2.pdf' and 'Employee User Guide v2.pdf'. A 'Print' button is also visible.

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

Dashboard Employees Performance Evaluations Library Reports Help

< Go to Evaluation Details Submit Evaluation

TT Tracy Test Employee
TEST POSITION

SECTIONS

Notes & Attachments

Goals

Success Factors

Professional Development

Achievements and Opportunities for Growth

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

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

GOAL SECTION Goals

Purge all files that are over three years old and move to storage by 5/31/22.

Fields are required.

RATING SCALE

Show descriptions >

Incomplete

Partially Completed

Completed

N/A

COMMENTS

All files that are over two years old have been moved. Remaining files will be moved within the coming month.

Feedback Entries

Reviewer Entries 1 entries Expand

Check-In Entries - Tracy Test Employee 3 entries Expand

Check-In Entries - Tracy Test Supervisor 3 entries Expand

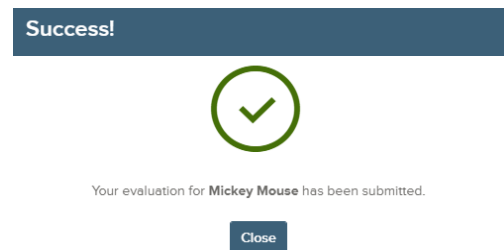
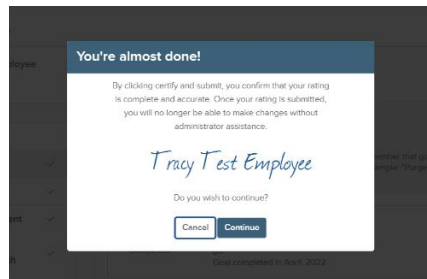
Next > Done

- 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
- 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.
- 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)**.
- 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”**.



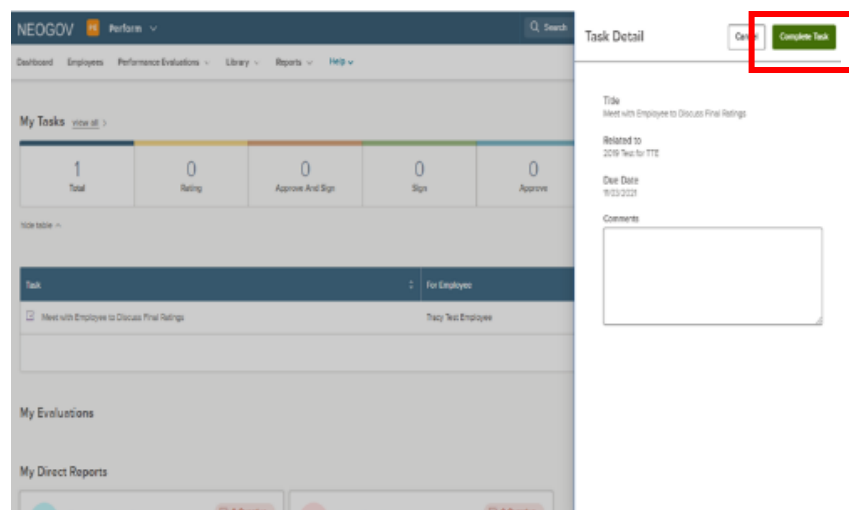
Once the review has been successfully submitted, your direct report is notified. At this point, you will reach out to your direct report to schedule a review meeting.

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.

My Tasks [view all](#) >


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

hide table ^

Task	For Employee	Related To	Due Date
 Approve and Sign 2019 Performance Development Plan for Tracy Test ...	Tracy Test Employee	2019 Performance Development Plan	12/19/2021



2. The approval page displays.

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


 Tracy Test Employee
Test Position


EVALUATION NAME
2019 Performance Development Plan

DUE DATE
Fri. Dec. 31, 2021

Rating Summary

 Tracy Test Employee
Test Position

 Tracy 2nd Test Supervisor
Test Position

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."

Purge all files that are over three years old and move to storage by 5/31/22.

Tracy Test Employee  Completed Goal completed in April, 2022

Tracy 2nd Test Supervisor  Partially Completed All files that are over two years old have been moved. Remaining files will be moved within the coming month.

- 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.

The screenshot shows a web form titled "Approve & Sign". At the top right, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red circle. Below the buttons is a "Comments" section with a text area labeled "Write comment here...". Underneath the comments section is a "Please sign your name below" section. This section contains a text box with a signature that reads "Test Supervisor" and a date field showing "July 10, 2018". Below the signature and date, there is a line for "Test Employee" and a date field showing "July 10, 2018". At the bottom of the form, there are two buttons: "Auto-Generate" and "Draw Signature".

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 PERFORMANCE 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"**.

The screenshot displays the NEOGOV Perform dashboard. At the top, there is a navigation bar with the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and a user profile for 'Tracy Test Supervisor'. Below the navigation bar, there are tabs for 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main content area is titled 'My Tasks' with a 'view all' link. It features a row of seven task cards: 'Total', 'Rating', 'Approve And Sign', 'Sign', 'Approve', 'Other', and 'Overdue', each with a circular icon and a zero count. Below this is a table with columns 'Task', 'For Employee', 'Related To', and 'Due Date'. The table is currently empty, showing 'No Results Found' and 'Showing No items to display'. At the bottom, there is a section titled 'My Evaluations' and a section titled 'My Direct Reports' which is highlighted with a red rectangular box. The 'My Direct Reports' section contains two cards: one for 'T2 Tracy 2nd Test Su...' and another for 'TT Tracy Test Employo...', both showing '0 Overdue'.

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

The screenshot shows the profile of Tracy Test Employee. The 'Evaluations' section is highlighted with a red circle. It contains two performance development plans:

2019 Performance Development Plan	2019 Test for TTE
Due: Fri, Dec 31, 2021	Due: Tue, Nov 09, 2021
Type: Periodic	Type: Periodic
Completed: -	Completed: Tue, Nov 09, 2021
Archived: No	Archived: No
Status: Before Ratings	Status: Completed
Actions:	Actions:

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

The screenshot shows the '2019 Annual Evaluation' details for Tracy Test Employee. The 'Pause' button is highlighted with a red circle. The evaluation details are as follows:

2019 Annual Evaluation	
Due Date: Fri, Dec. 31, 2021	
Copy	Print
Pause	
EVALUATION DETAILS	
Current Status: Before Ratings	Type: Periodic
EMPLOYEE DETAILS	
Position: Test Position	Department: Department for testing ...

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

Pause Evaluation

You are about to place this evaluation into Draft status, and Process will be paused.

CancelContinue

- 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”**.

Tracy Test Employee
TEMPORARY POSITION

Employee
Org Chart
Manager

ADMINISTRATION

Content

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 5/31/19."

Items	Description	Progress	Edit
Test Goal 1		0%	

- 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.***

SUCCESS FACTOR SECTION | EXPECTATIONS (3 LEVELS)

Success Factors

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
Ethics/Honesty/Integri...	* Adheres to the highest standards of ethical conduct. * Avoids misconduct and the ap...	
Communication Skills	* Is clear and credible in oral presentations to diverse audiences * Listens effectively a	
Leadership Skills	* Leads and inspires coworkers to accomplish goals * Fosters an inclusive workplace...	

IMPORTANT

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

The screenshot shows the '2019 Annual Evaluation' interface for 'TRACY TEST EMPLOYEE'. The 'Due Date' is 'Fri. Dec. 31, 2021'. Below the title are three buttons: 'Copy', 'Print', and 'Start'. The 'Start' button is circled in red. Below the buttons are two panels: 'EVALUATION DETAILS' and 'EMPLOYEE DETAILS'. The 'EVALUATION DETAILS' panel shows 'Current Status: Draft' and 'Type: Periodic'. The 'EMPLOYEE DETAILS' panel shows 'Position: Test Position' and 'Department: Department for testing ...'. At the bottom, there are tabs for 'Content' and 'Process'.

7. Click “Continue” on the pop-up screen.

The screenshot shows a pop-up window titled 'Activate Evaluation'. The text inside reads: 'You are about to resume the process of this evaluation. It will no longer be in Draft status.' Below the text are two buttons: 'Cancel' and 'Continue'.