

Manager Perform User Guide

Table of Contents

Overview	3
Before You Use This Guide.....	3
Who Should Use This Guide.....	3
Contacts for Questions.....	3
Navigating the Dashboard	4
Who Should Use This Section.....	4
Navigating to the Dashboard.....	4
In-App Help.....	5
<i>Using In-App Guidance</i>	5
<i>Using Helpful Hints</i>	6
My Tasks.....	7
My Evaluations.....	8
My Direct Reports.....	9
Active Evaluations and Overdue Tasks.....	9
Journal Hub.....	10
My Profile (Talent Profile).....	10
Journal Entries	12
Who Should Use This Section.....	12
Navigating to Journal Entries.....	12
Adding Journal Entries via the Journal Hub.....	12
Adding Journal Entries via Email.....	14
Adding Journal Entries via the Dashboard.....	17
Adding Journal Entries via the Talent Profile.....	17
Creating and Activating Evaluations	18
Who Should Use This Section.....	18
Navigating to the Evaluation Section.....	18
Completing Tasks	21
Who Should Use This Section.....	21
Navigating to My Tasks.....	21
Adding Goals (Optional)	23
Who Should Use This Section.....	23
Navigating to My Tasks.....	23
Navigating to the Performance Evaluation List – Adding Goals in Bulk.....	25
Rating Your Direct Report’s Evaluation (Optional)	29
Who Should Use This Section.....	29
Navigating to My Tasks.....	29

Approving and Signing an Evaluation (Optional)	34
Who Should Use This Section.....	34
Navigating to My Tasks.....	34
Reports	37
Who Should Use This Section.....	37
Navigating to Reports.....	37
Tips and Tricks	41
Troubleshooting Browsers.....	41
FAQs.....	41

Overview

This guide details how to navigate the system as a Manager, covering how to rate evaluations, complete various tasks, and run reports, as well as 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 tasks assigned.

Who Should Use This Guide

This guide is intended for Managers.

Contacts for Questions

Please contact your HR Administrator should you have any additional questions.

Navigating the Dashboard

Who Should Use This Section

Managers should use this section to get familiar with the functionality of the dashboard.

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.

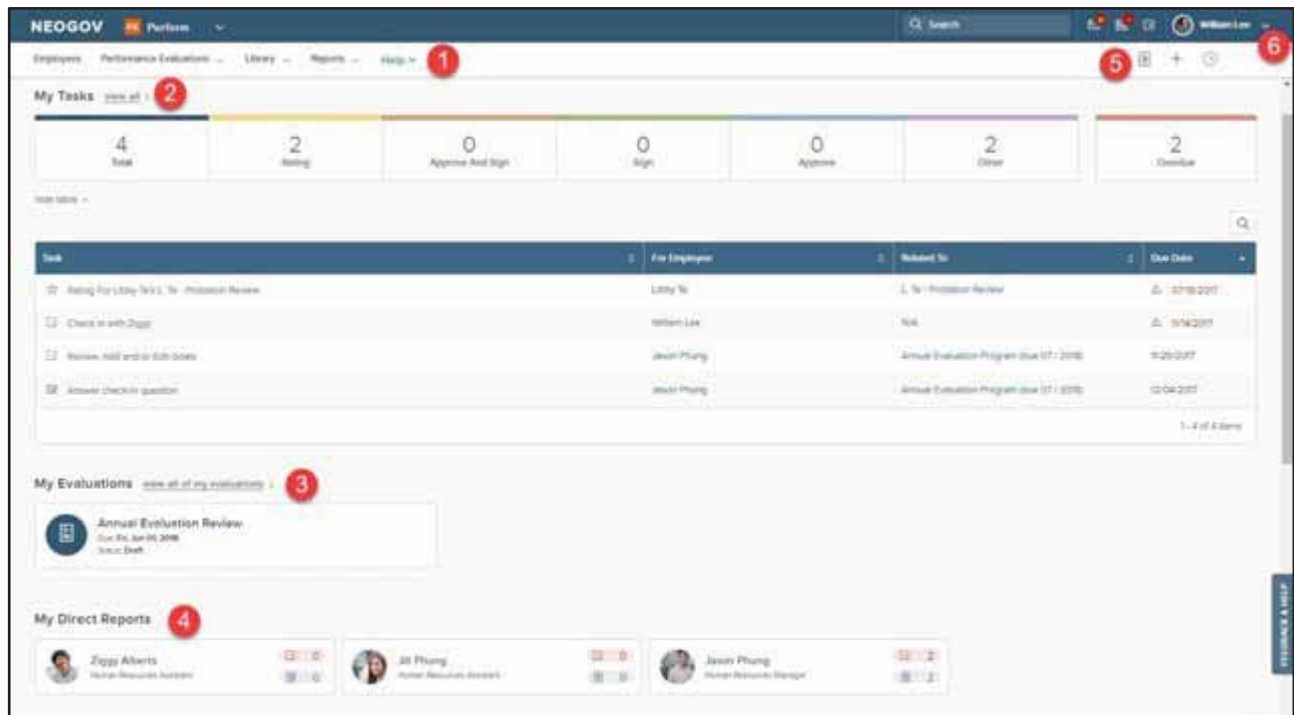


Figure 1: Dashboard

1. **Dashboard Menu:** Based on HR Configuration you see the following tabs:
 - a. The **Employees List**
 - b. The **Performance Evaluation List**
 - c. The **Library** (which houses the Goal and Competency Lists)
 - 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 three most recent performance evaluations (if applicable)
4. **My Direct Reports:** All of your Direct Reports
5. **Journal Hub:** Contains all Journal Entries that you have created, as well as any pending entries
6. **My Profile:** Access your Talent profile, update your password, and sign out of Perform

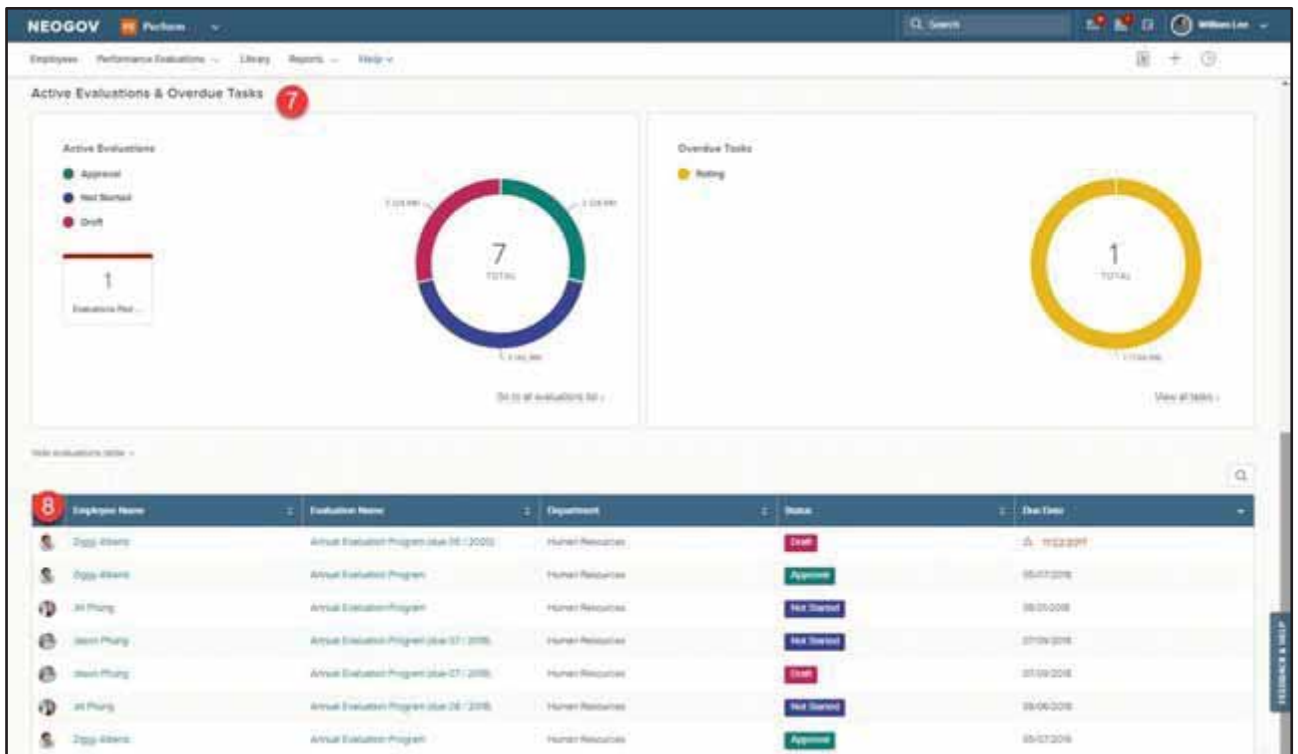


Figure 2: Dashboard Part 2

- Active Evaluations and Overdue Tasks:** Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and yourself (dependent on permissions configured by HR)
- Active Evaluation and Overdue Tasks List:** Updates to reflect the corresponding information selected on the graphs above

In-App Help

Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

Using In-App Guidance

There is a **Help** menu accessible to all users. Hover over the Help icon to view a list of common actions.



Figure 3: Help Menu

Users can click on an action, and the system guides them on the relevant steps to complete that action, as well as provides a helpful description for each step. When a corresponding tutorial exists, that displays as an option to view also. Select **Stop Guide** to stop the guided tour completely.



Figure 4: Stop Guide

When a tutorial begins to play, it is anchored in the bottom left of the screen. Change its placement by selecting the drop-down menu in the top left of the tutorial.

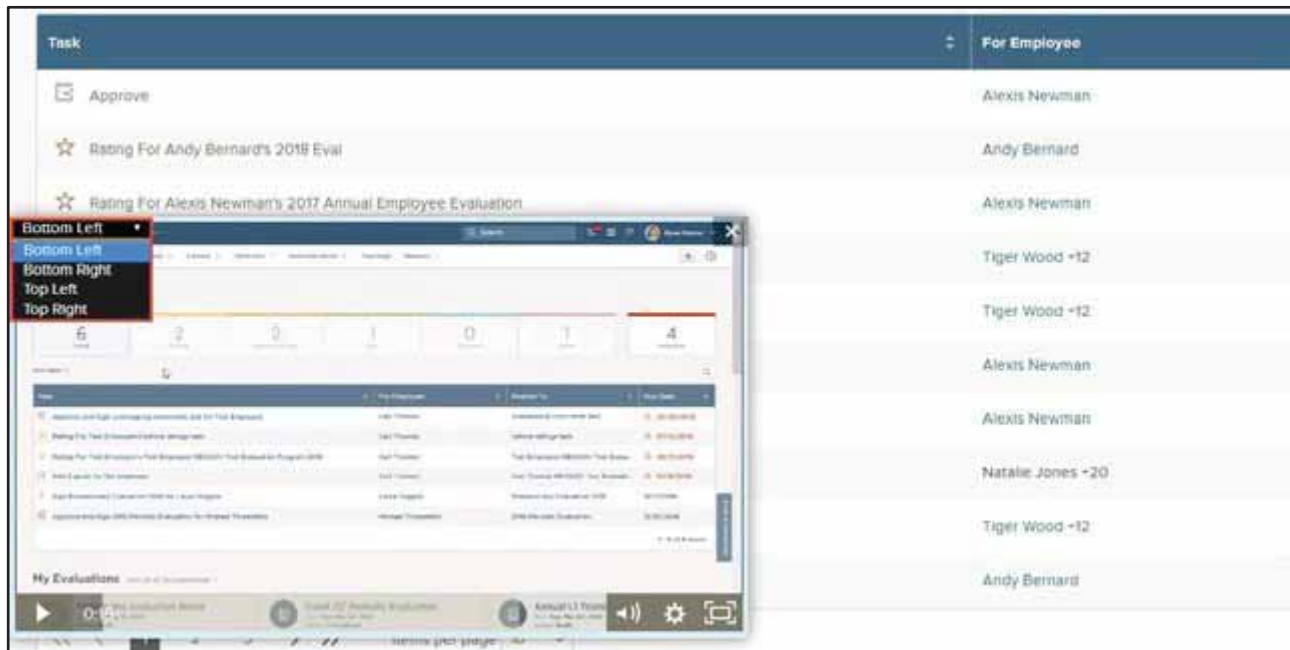


Figure 5: Tutorial Placement

NOTE: If you leave the page playing a tutorial, the tutorial closes and is not available on the next page.

Using Helpful Hints

Additionally, when you hover over the **Help** icon, there is a **Helpful Hints** toggle that can be enabled or disabled.

If Helpful Hints are enabled, blue Helpful Hint icons display throughout Perform in areas where users might need more assistance.

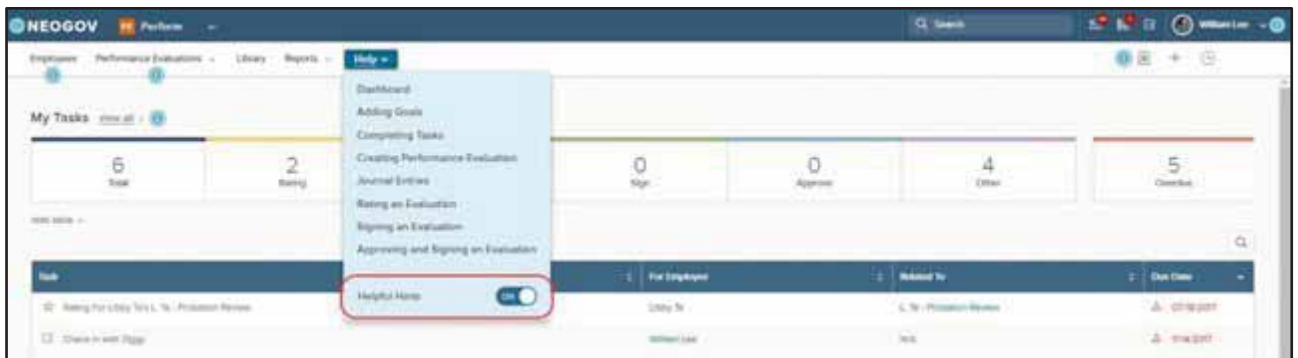


Figure 6: Helpful Hints

Click on a Helpful Hint to receive more information about that specific action. Depending on the Helpful Hint, the system may refer the user to other related hints, or it may offer a description and the corresponding tutorial (if applicable). View the tutorial by selecting **Watch Video** or close the Helpful Hint description by selecting **Close**.

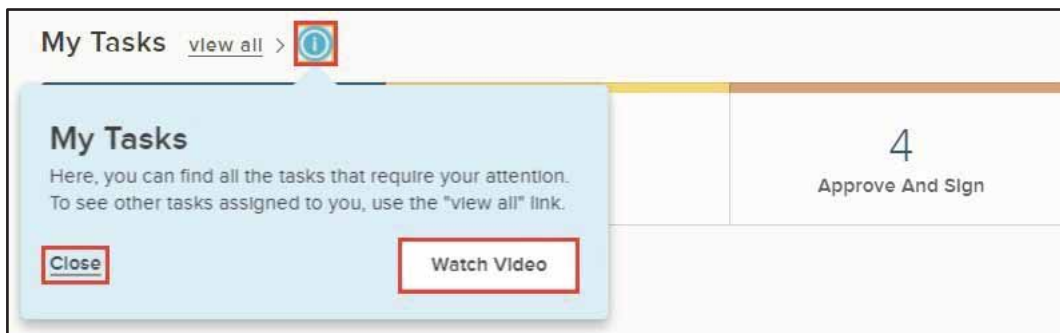


Figure 7: Watch Video

To turn off the Helpful Hints, hover over the Help icon and disable the Helpful Hints.

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.

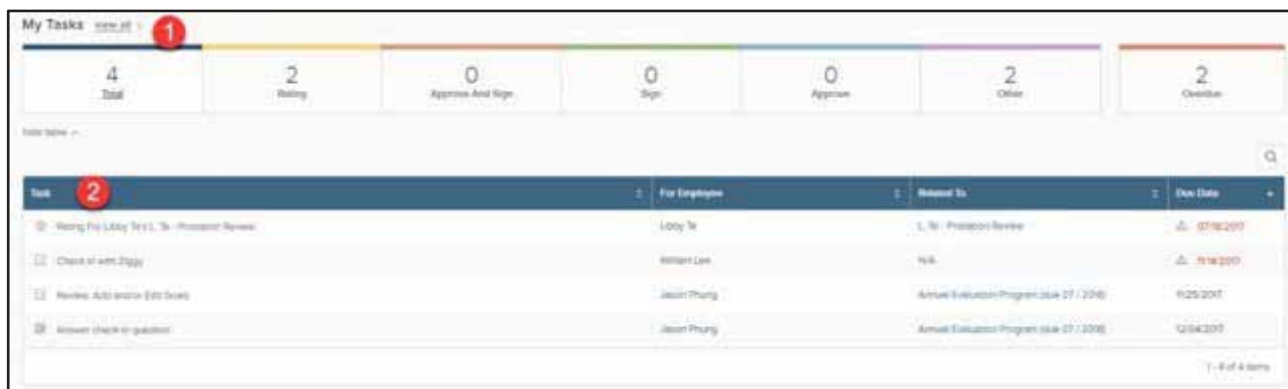


Figure 8: My Tasks

1. **View All:** Select this to view tasks that are Current, Completed, Canceled, Pending, and Skipped
 - a. **Current:** Tasks currently requiring action

- b. **Completed:** Tasks you've already acted on
 - c. **Canceled:** Tasks no longer required
 - d. **Pending:** Tasks pending another user's action, or tasks for *Draft* evaluations
 - e. **Skipped:** Tasks that had been assigned to you, but skipped by an HR Admin
2. To **complete a task**, select the name to be re-directed to the task
- a. For more information, please refer to page

12 The task types are designated as follows:

- a. **Total:** All tasks currently requiring your action
- b. **Rating:** Any rating required on a self-evaluation, a Direct Report's evaluation, a peer rating task, or any recurring tasks such as Journal Entries and Check-Ins
- c. **Approve and Sign:** Task to approve and sign the evaluation after it's been rated
- d. **Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated
- e. **Approve:** Task to approve the evaluation after it's been rated
- f. **Other:** Any manual task
- g. **Overdue:** Any task with a past due date

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 tasks
	= Recurring Manual task
	= Recurring Check-In
	= Recurring Journal Entry

Figure 9: Task Legend

My Evaluations

Underneath the tasks section of the Dashboard is the **My Evaluations** section. Here are your three most recent performance evaluations (if applicable). Select any one of the evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation.



Figure 10: My Evaluations

To view all historical evaluation, select **view all of my evaluations**. To view the evaluation detail page of a specific evaluation, select the title of the evaluation.

My Direct Reports

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



Figure 11: My Direct Reports

Click on the name of your direct report to be re-directed to their Talent Profile page. Additionally, you can click into their overdue tasks 0, or their Journal Entries 0, and a fly-out appears for the respective item.

Active Evaluations and Overdue Tasks

The next section is the **Active Evaluations and Overdue Tasks** (dependent on security permissions configured by HR).

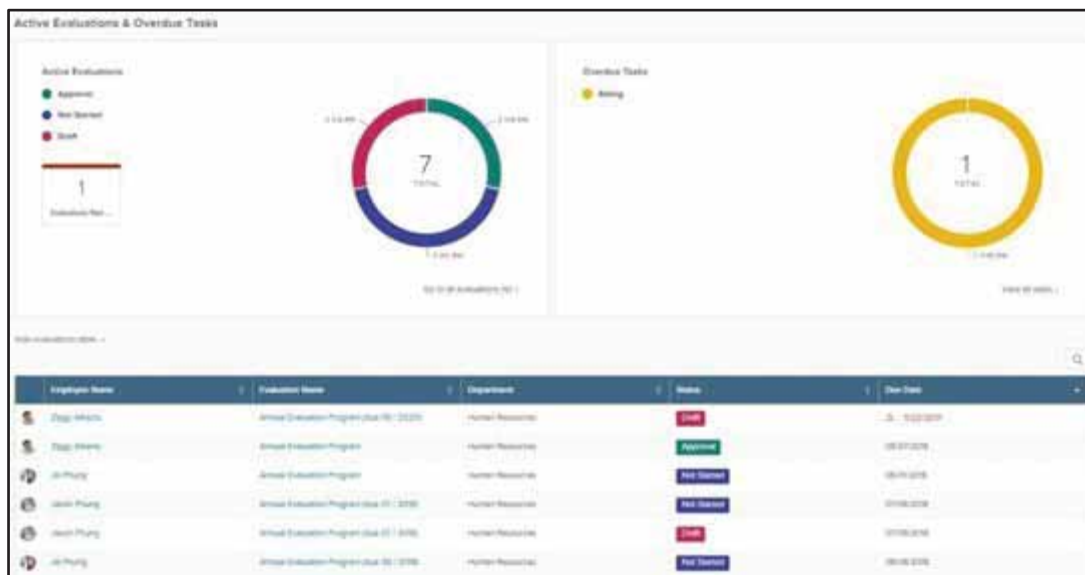


Figure 12: Active Evaluations and Overdue Tasks

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.

The **Overdue Tasks** graph displays the number of overdue evaluation tasks divided by the four statuses. Select the graph for a fly-out containing the list of all overdue tasks.

To hide the list, select the **hide evaluations table** button. Use the magnifying icon  to filter any column.

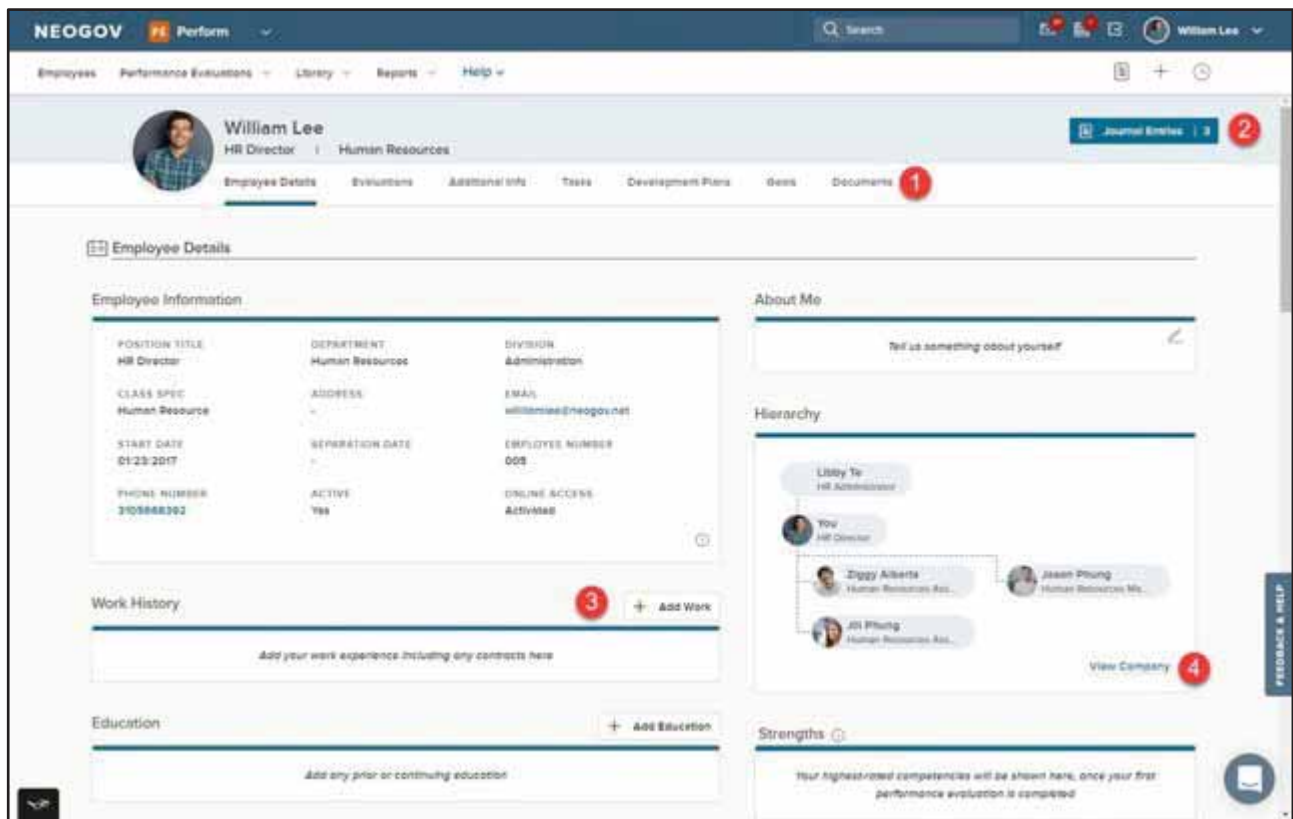
Journal Hub

All managers have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you).

For more information, please refer to page 12.

My Profile (Talent Profile)

To access your **Talent Profile** page, hover over your name in the top right corner. Select **My Profile**.



The screenshot displays the NEOGOV Talent Profile page for William Lee, HR Director. The page is divided into several sections:

- Employee Information:** A table with fields: POSITION TITLE (HR Director), DEPARTMENT (Human Resources), DIVISION (Administration), CLASS SPEC (Human Resource), ADDRESS, EMAIL (williamlee@neogov.net), START DATE (01/23/2017), SEPARATION DATE, EMPLOYEE NUMBER (005), PHONE NUMBER (3108663302), ACTIVE (Yes), and ONLINE ACCESS (Activated).
- About Me:** A text input field with the placeholder "Tell us something about yourself".
- Hierarchy:** An org chart showing William Lee as HR Director, reporting to Libby Te (HR Administrator). Other employees shown include Ziggy Alberta (Human Resources Asst.), Jason Phung (Human Resources Mgr.), and Jill Phung (Human Resources Asst.).
- Work History:** A section with an "Add Work" button and a red callout box 3.
- Education:** A section with an "Add Education" button.
- Strengths:** A section with a message: "Your highest-rated competencies will be shown here, once your first performance evaluation is completed".

Red callout boxes highlight specific features:

- 1. Header tabs: Employee Details, Evaluations, Additional Info, Tasks, Development Plans, Docs, Documents.
- 2. Journal Entries button.
- 3. Add Work button.
- 4. View Company button.

Figure 13: Talent Profile

1. Header tabs may include **Employee Details**, **Evaluations**, **Additional Info**, **Tasks**, **Development Plans**, and **Documents** that are associated to you
 - a. To navigate to each section, select the section title at the top, or scroll down the page
2. Add **Journal Entries** from this button
 - a. For information on adding Journal Entries, refer to 19
3. Add information to widgets
4. View your immediate **Hierarchy**
 - a. To view the entire agency org chart, select **View Company**



You cannot edit any of your Employee Information, such as position, email address, etc. If you need to update that information, please contact your HR Administrator

Based on HR configuration, you can add information to different informational widgets under the Employee Details section. For example, to add information to the Work History widget, select **+ Add Work**.

A fly-out appears. Any field highlighted in red is required; you must fill out those fields to save. Enter in all information, and save.

Figure 14: Add Work History

Once saved, the new information populates your employee details section. Continue to add information in the same fashion to any widget as desired.

Figure 15: Work History

Journal Entries

Who Should Use This Section

Any user logging and sharing their journals throughout the year. Journal Entries are an easy and effective way to take notes of accomplishments throughout the year for yourself, your direct reports, and potentially other employees (depending on HR configuration).

Navigating to Journal Entries

There are several ways to log Journal Entries in Perform. They can be created from the **Journal Hub**, from the **Dashboard**, and from the **Talent Profile**. They can even be **emailed** directly to Perform!

Adding Journal Entries via the Journal Hub

All managers have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you).

The Journal Hub icon is always accessible to the user, no matter what page they are viewing in Perform.

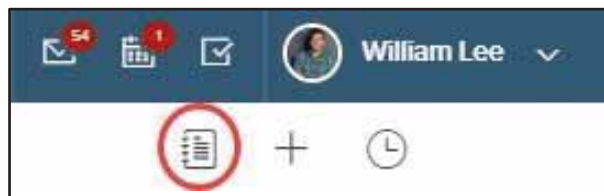


Figure 16: Journal Hub

Select the Journal Hub icon and a flyout displays the **Journal Entries Hub**.



Figure 17: Journal Entries Hub Fly-Out

1. **Current:** Journal Entries successfully posted are found in the Current tab
2. **Pending:** Journal Entries unsuccessfully posted can be found and corrected in the Pending tab
 - a. Once corrected, the Journal Entry is posted to the Current tab
3. **Who is this entry about?:** Search for any employee to create a Journal Entry for, including yourself

or any direct reports. Once someone is selected, any posted Journal Entries that you have access to displays at the bottom of the hub

4. **Body of Journal Entry:** Utilize the rich text editor when entering the text of your Journal Entry
 - a. *One attachment* can be included (5MB)
5. **Save:** Select Save to post the Journal Entry
6. **Close:** Select Close at any time to close the flyout and return to the previous page. Any unsaved Journal Entries are lost

Let's review what it looks like to log a Journal Entry from the Journal Hub.

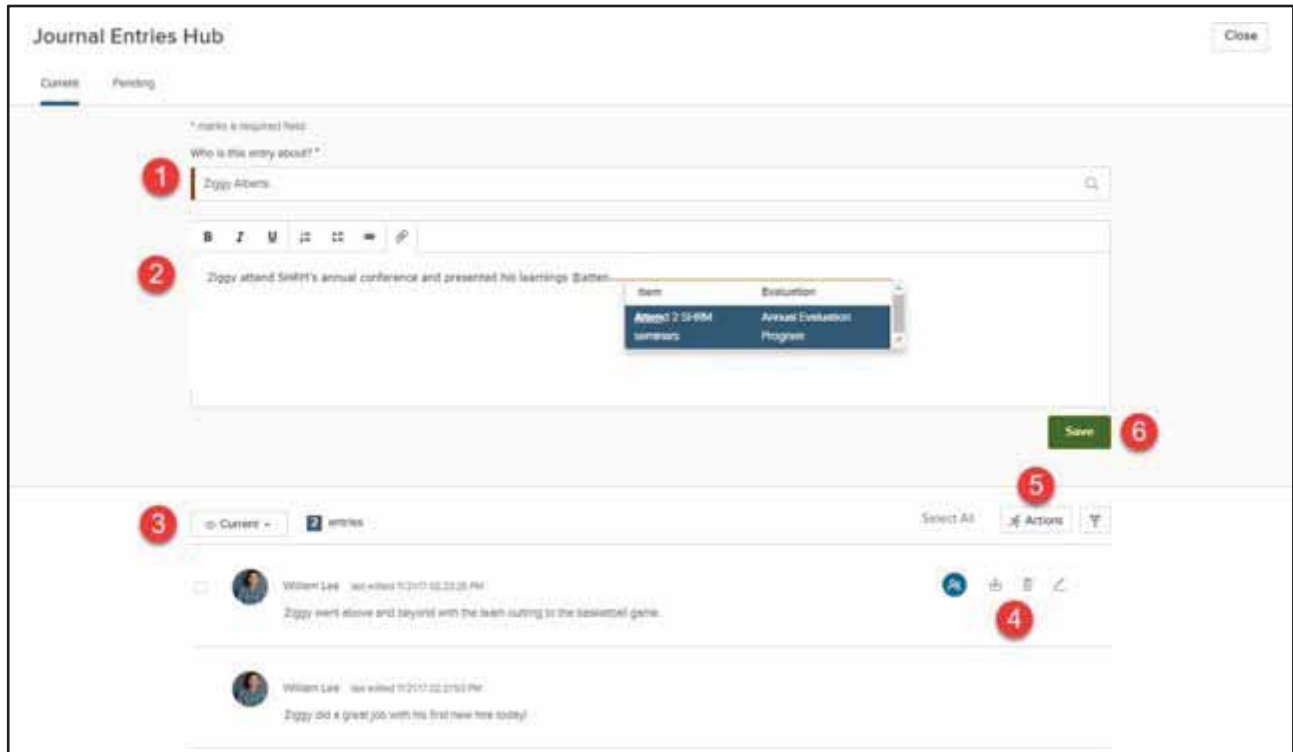







Figure 18: Creating a Journal Entry

1. Enter the **name** of the employee for whom to create a Journal Entry
 - a. Any Journal Entries you have access to for that employee displays below
2. Use the **Rich Text Editor** to enter the Journal Entry and style as necessary
 - a. You can add one (1) attachment to each Journal Entry
 - b. To tag a **Competency, Goal, or Narrative**, enter '@' and type the desired competency, goal or narrative. A list of matching items appears. Select the correct item. This assists in searching for this particular Journal Entry when rating
3. Use the menu to toggle between **Current** entries and **Archived** entries
4. You can **share, archive, delete** and **edit** your entries
 - a. To **share**, select the blue people icon 
 - i. Share Journal Entries created for your Direct Reports with that direct report or your manager
 - ii. You can share Journal Entries created for yourself with your Manager and your Manager's Manager
 - iii. The default setting allows sharing up to two levels in the organizational hierarchy. If HR has configured to allow Journal Entries to be shared with others, you may see

further sharing options available. For more information on Journal Entry Settings, please refer to Series C

- b. **Archive** a Journal Entry by selecting the archive icon  to de-clutter the system, making it easier to search through feedback entries
 - i. Once archived, the entry moves from your current list to the archived list. The archived entry no longer appears for selection in the rating form
 - ii. To unarchive, select the unarchive icon 
 - c. To **delete** any entries you created, select the trash icon 
 - d. To **edit** your entry, select the pencil icon 
5. Use the **Bulk Actions** menu to **Archive, Delete, Print with Attachments, and/or Print without Attachments**
 6. Once you have added all comments, attachments, and tagged evaluation items, select **Save**



Archived Journal Entries can be unarchived from the Archived tab

Adding Journal Entries via Email

Users with access to create Journal Entries can do so simply by sending an email. Instead of logging into Perform to create Journal Entries, users can send an email, and its contents automatically create as a Journal Entry within Perform.

This is very useful for managers and employees who work in the field and cannot log into Perform regularly, as they can easily create Journal Entries by sending emails from their smartphones.

Employees must send the email from the email address that is used for their Perform account.

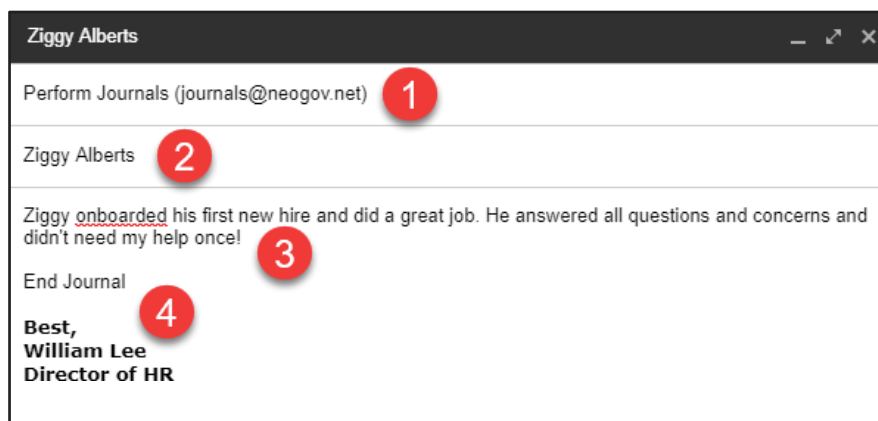


Figure 19: Emailing Journal Entry

1. The email must be sent to **journals@neogov.net**

2. The email's subject/title should only include the name of the employee for whom the Journal Entry is being created. The spelling of the employee's name must match the spelling of it in Perform
3. Whatever is written in the body of the email automatically creates as a Journal Entry once the email is sent
4. Enter the phrase "End Journal" after the last sentence in the email. This prevents any signature lines from being added to the Journal Entry once it is created
 - a. "End Journal" is not visible in the Journal Entry once it is created



There can only be one attachment in the email. The attachment becomes a part of the Journal Entry once it is created in the system

NOTE: You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

Currently, the tagging and sharing features are not supported while sending the email. However, once the Journal Entry is created, the tagging and sharing actions can be taken within Perform.

Once the email is sent, the Journal Entry is created in Perform and is accessible from the Journal Hub. Any Journal Entries that are error free when emailed automatically post and are available in the **Current** tab.

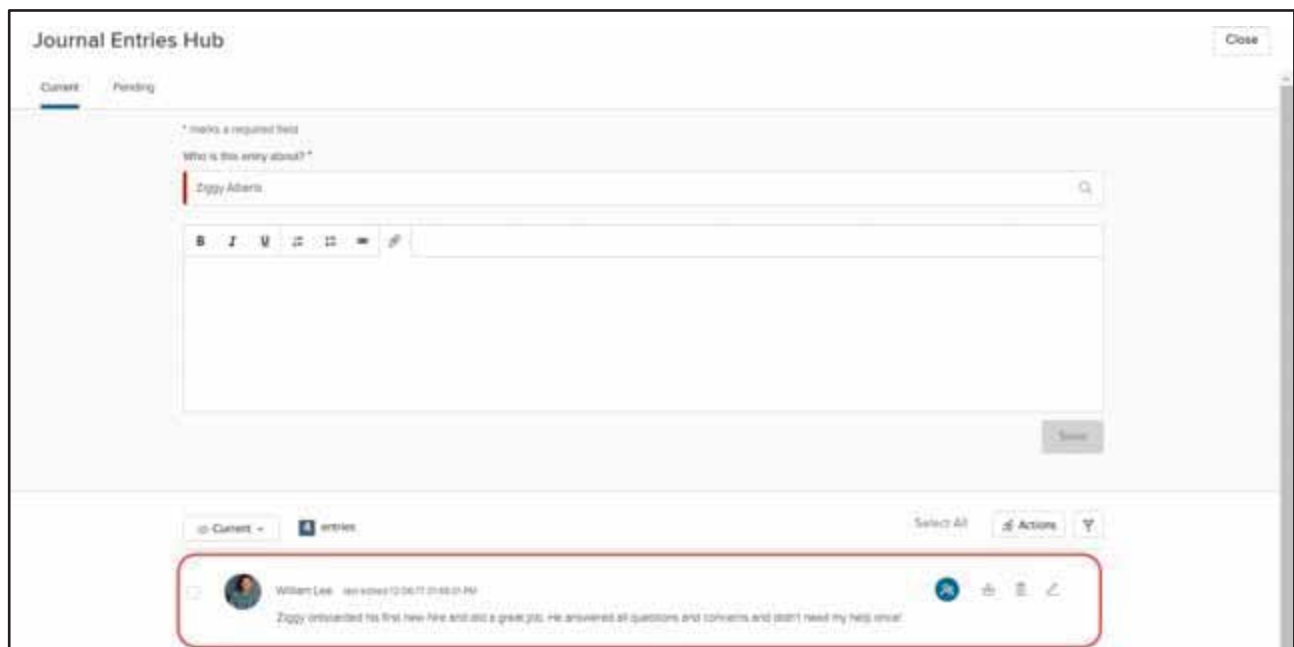


Figure 20: Current Tab – Journal Hub

Any Journal Entries that contained errors when emailed display in the **Pending** tab. Journal Entries within the Pending tab have not been successfully posted yet. Once the errors are corrected, the entry is successfully posted to the Current tab. The error is listed next to each Journal Entry with the ability to correct it.

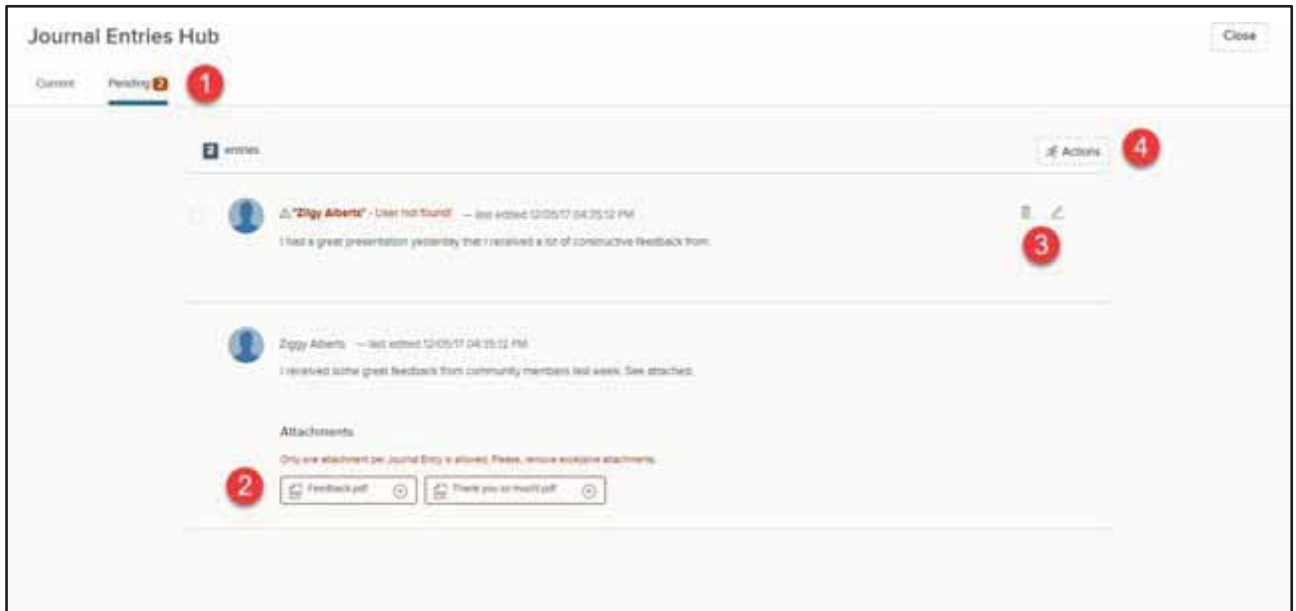


Figure 21: Pending Tab – Journal Hub

1. The **number of pending Journal Entries** display on the Journal Hub icon from the dashboard and the Pending tab
2. The **error message** for each pending Journal Entry appears
 - a. All possible errors are listed below
3. Select the pencil icon to edit or **correct** a pending Journal Entry. Select the trash can icon to delete a pending Journal Entry
4. Pending Journal Entries can be **deleted** in bulk using the Actions tab and checkboxes per entry

There are 6 different types of errors. Each error generates a bounce back email (with the exception of one), which lets the employee know what the error is and how to correct it. The bounce back email includes a link to the employee’s Journal Hub.

NOTE: Please do not reply to the bounce back emails.

The 6 types of errors are:

- *User not found* - when the name of the employee in the subject/title does not match an employee’s name in Perform
- *Unsupported attachment format* - when Perform does not support the format of the attachment submitted with the email
- *More than one attachment* - when multiple attachments are sent with the email, since only one attachment per Journal Entry is allowed
- *More than one employee having the same name* - when there are multiple employees in Perform with the same name as the employee in the email’s subject/title
- *Security restriction* - when the person who sent the email does not have access to create a Journal Entry for the employee in the email’s subject/title
- *Email address of the sender does not exist* – when the sender’s email does not exist in Perform the journal is not created. **No bounce back email** is sent to the invalid sender

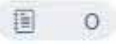
Once the pending Journal Entry is corrected, it posts and is made available within the Current tab.

Adding Journal Entries via the Dashboard

You can create Journal Entries for your direct reports via the **My Direct Reports** section on your dashboard.



Figure 22: My Direct Reports

Select the blue journal icon  for the direct report you would like to create a Journal Entry for. A fly-out appears with all Journal Entries you have created for that employee previously, and any that have been shared with you about them.

Adding Journal Entries via the Talent Profile

Navigate to the desired employee's **Talent Profile** page by selecting their name on the *Employee List*.

From your direct report's **Talent Profile**, select the **Journal Entries** button, in the top right corner.

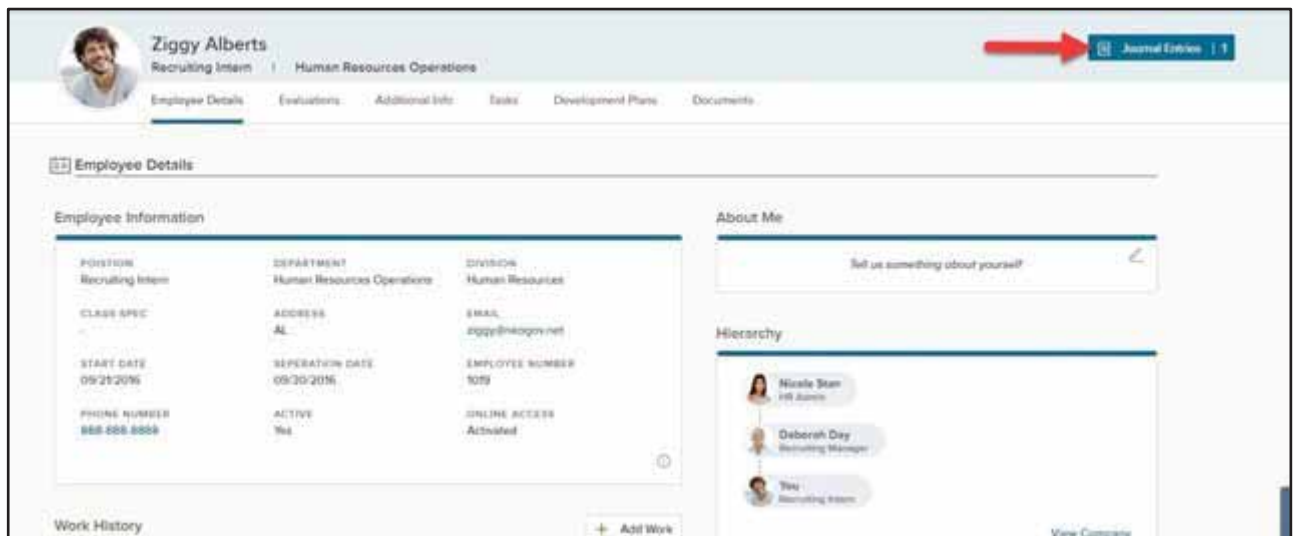


Figure 23: Talent Profile – Journal Entries

A fly-out appears with all Journal Entries you created for that employee previously.

Creating and Activating Evaluations

Who Should Use This Section

If enabled by HR, Managers have the ability to create an evaluation.

Navigating to the Evaluation Section

From the **Employee List**, search for the specific employee and select their name. You are then taken to their **Talent Profile**. To create an evaluation, navigate to their **Evaluation** section.

Under the Evaluations section, select **+ Add Evaluation**.

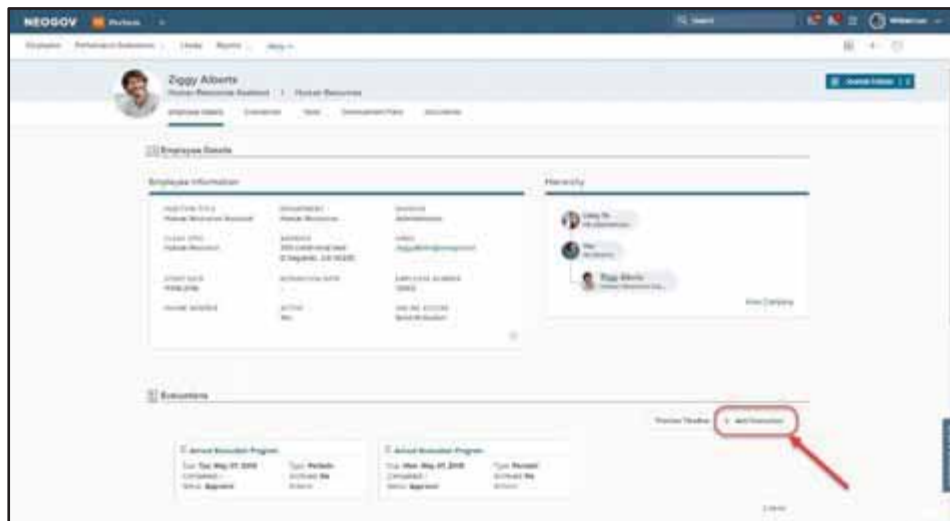


Figure 24: Add Evaluation

The **Evaluation Creator** page appears.

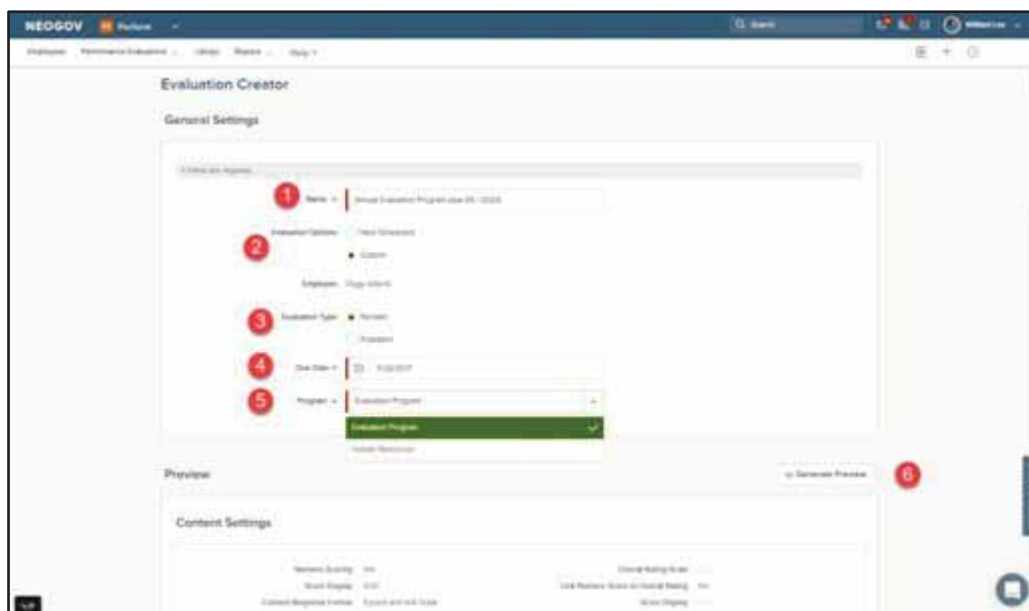


Figure 25: Evaluation Creator

1. Create a **Name** for the evaluation
2. Select if you would like to use the **Next Scheduled** evaluation, or create a **Custom** evaluation
 - a. If you choose **Next Scheduled**, the next scheduled evaluation automatically defaults
 - b. Per the above example, if you choose **Custom**, you can choose which evaluation to create for the employee as well as a specific *Due Date* and *Evaluation Program*
3. Select if this evaluation is a **Periodic** or **Probation** type evaluation
4. If custom evaluation was selected, enter in the **Due Date**
5. If custom evaluation was selected, select which **Program** to create the evaluation from
6. To see a preview of the evaluation select **Generate Preview**
 - a. The preview displays the Content and Process sections

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



For *future goals* to populate correctly on future evaluations, the next scheduled option must be used

Contingent on configuration settings defined by HR, the evaluation may remain in a *Draft* status, or may automatically update to *Not Started* status. If in draft, select **start evaluation** to begin the evaluation rating process.

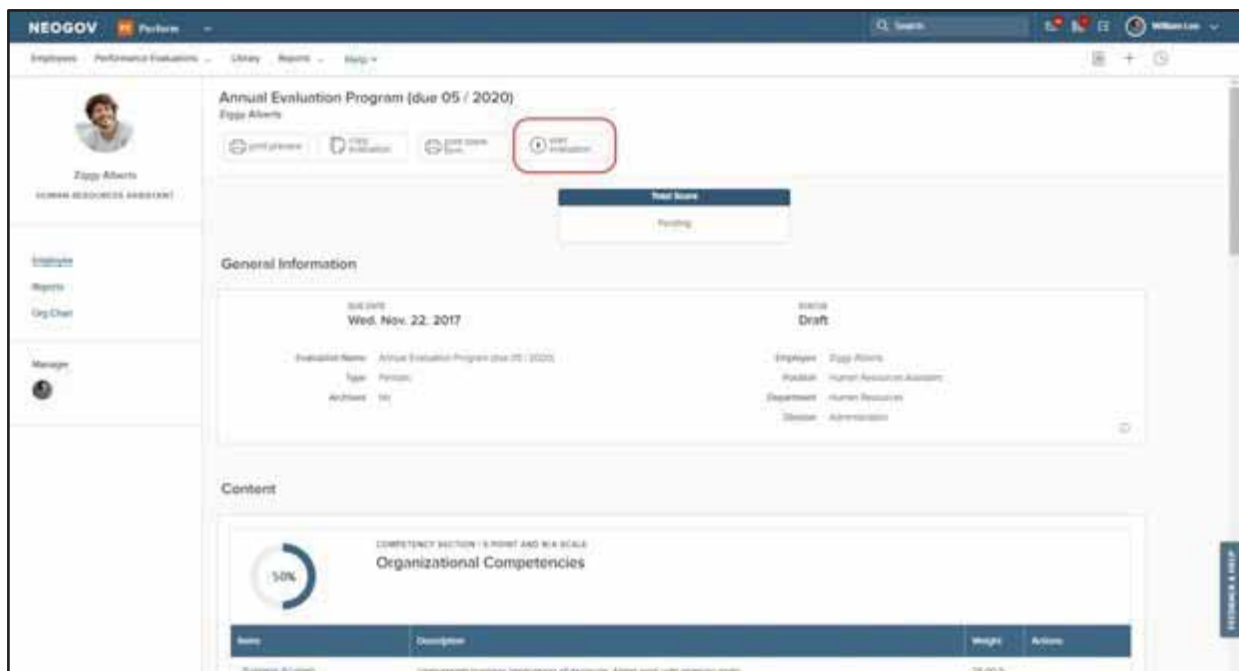


Figure 26: Starting an Evaluation

An **Activation Evaluation** pop-up message appears. Select **Continue**.



Figure 27: Confirmation Message

The evaluation is now activated and the first step in the process begins.

Completing Tasks

Who Should Use This Section

As a Manager, you have tasks to complete for yourself as well as your direct reports. This section covers how to complete various types of tasks.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see any current or overdue tasks that require your action.

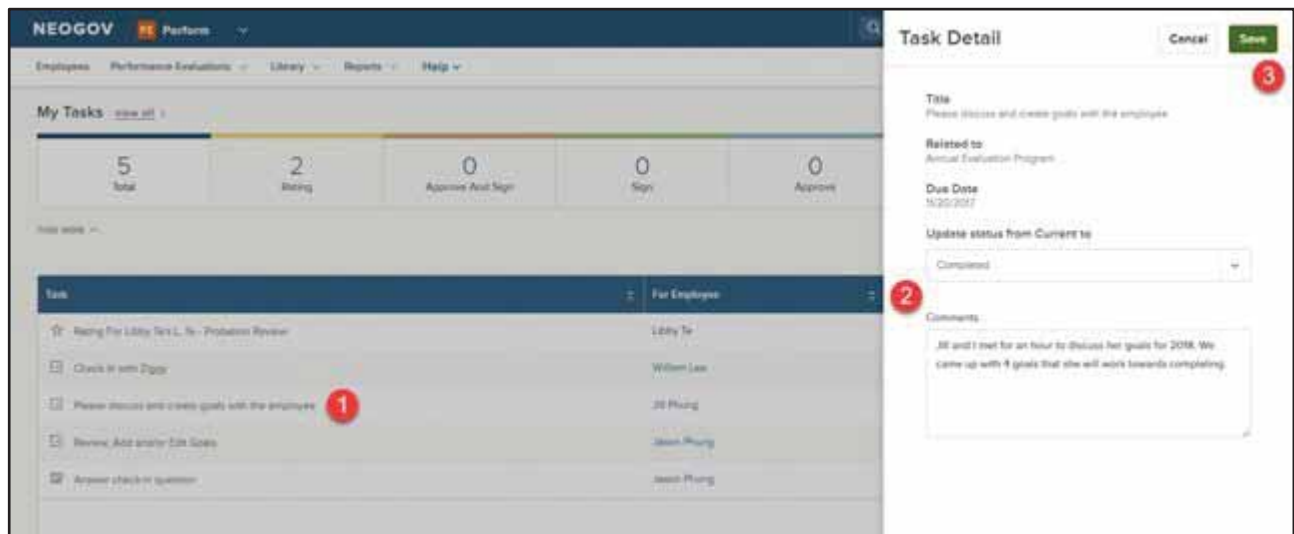


Figure 28: My Tasks – Completing a Task

1. Click into the corresponding **Task Name** from the list
 - a. In this example, Manager William Lee must complete a manual task. He must meet with his direct report to discuss and create goals
2. A fly-out appears with the task details
 - a. The status defaults to **completed**
 - b. Enter any **comments** as necessary
3. When you have completed the task, select **Save**
 - a. You receive a green banner once the step has been completed

The next task that has become current for the manager is a **Recurring Check-In** task.

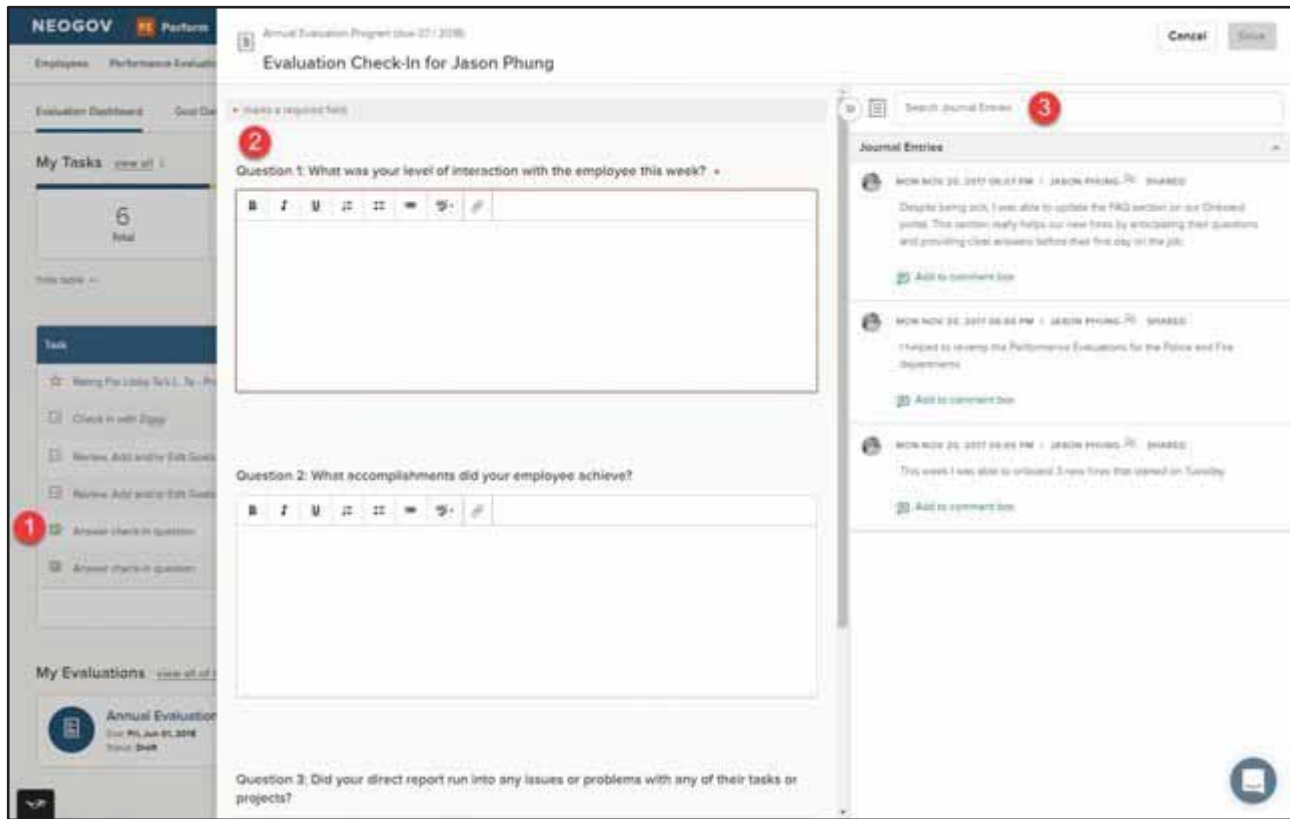


Figure 29: Recurring Check-In Task

1. Select the **Task Title**
2. A fly-out appears with the **Check-In** questions
 - a. Required questions are highlighted in red
3. Any Journal Entries you have created for the related employee, or any Journal Entries the employee has logged and shared with you, appear in the **Journal Entries** list
 - a. You can use the **Add to comment box** button to add any Journal Entry to a check-in question

NOTE: Attachments can be added while completing check-in tasks via the rich text editor. Responses to check-in questions show up in the Feedback Entries section of the rating form and any check-in attachments can be downloaded from there.

Once you have completed all required and optional questions, select **Save**. Because this is a recurring task, it stays on your dashboard. Once the next due date for the recurring task approaches, depending on HR configuration, you receive a reminder notice to complete the next Check-In form. Once rating has begun, the recurring task disappears.

The completed task filters out of your dashboard task list. To view the completed task, select the **view all** button as mentioned on page 7.

Additional tasks, such as adding goals, rating, and approving & signing evaluations are covered in detail in the following sections of this guide.

Adding Goals (Optional)

Who Should Use This Section

Some agencies use a Goal setting process, where Managers are required to add Goals to their Direct Report's evaluations. If this is the case, you can either add goals to the individual evaluation, or assign goals in bulk.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see the task to **Review, Add/or Edit Goals**.

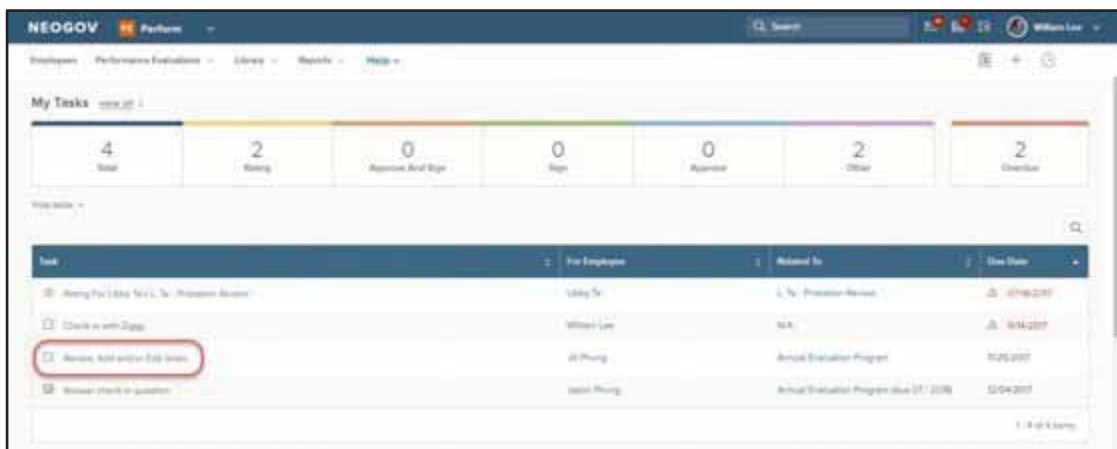


Figure 30: My Tasks – Goals

Select the Task's name, and you are re-directed to your Direct Report's Goals Section of the rating form.

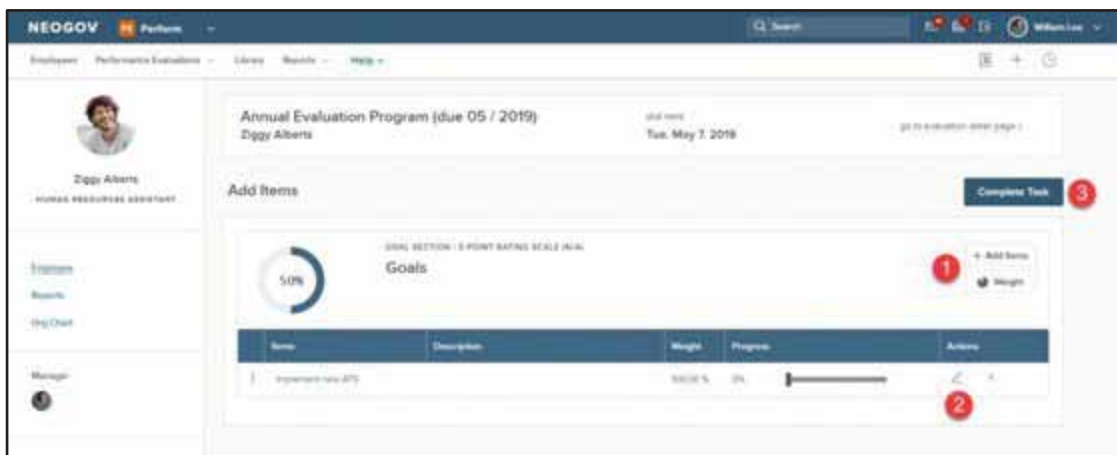


Figure 31: Adding Goals

1. Select **+ Add Items** to add goals to your evaluation or select **Weights** to edit each item weight. You can add goals:
 - a. **From Goal Library:** Select an existing goal from the Goal List (if applicable)
 - b. **From Position:** Auto-populate goals from Positions (if configured by HR)

- c. **From Class Specification:** Auto-populate from Class Specs (if configured by HR)
 - d. **From Development Plan:** Auto-populate from an existing, current Development Plan (if applicable)
 - e. **From Last Scheduled Evaluation:** Auto-populate goals that were entered in a Future Goals section on the last scheduled evaluation completed (if applicable)
 - f. **New Goal:** Create a brand-new goal
2. If there are existing goals on the evaluation, per HR configuration, you can **edit** the goal(s)
 - a. To do so, select the pencil icon and a fly-out of the goal detail page appears
 - b. Once you have made all edits, select save
 3. Once you have added all goals and/or updated existing goal(s), select **Complete Task**

If you choose to add a **New Goal**, a fly-out appears to enter the Goal Details:

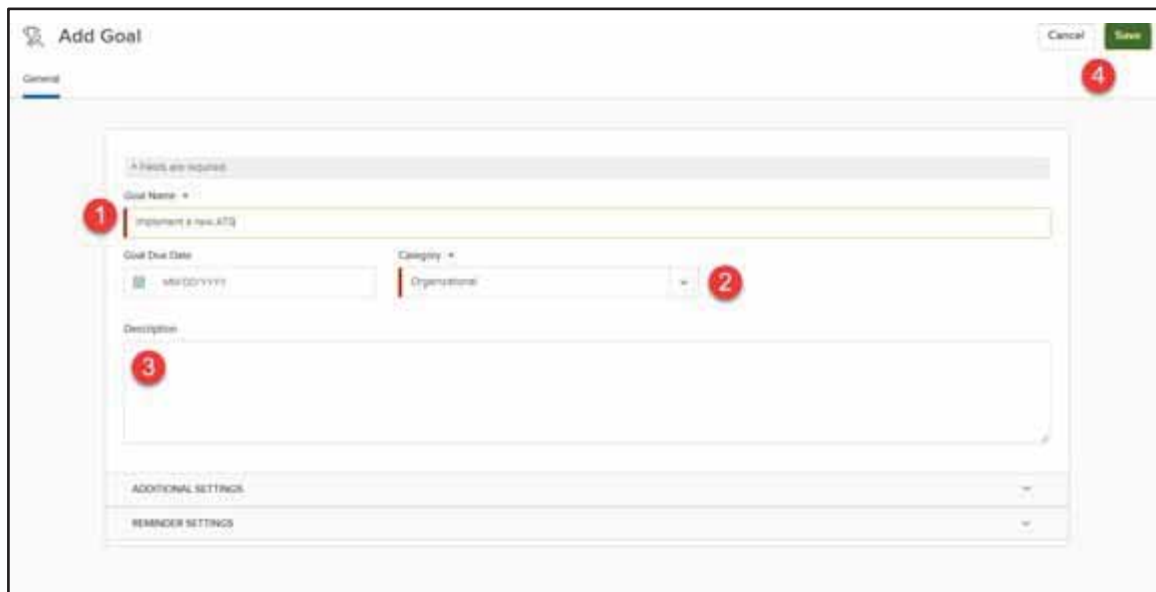
The image shows a screenshot of a web application interface titled "Add Goal". The interface is divided into sections: "General", "ADDITIONAL SETTINGS", and "REMINDER SETTINGS". The "General" section contains a "Goal Name" field with the text "Implement a new ATE", a "Goal Due Date" field with a calendar icon and the text "MM/DD/YYYY", and a "Category" dropdown menu with "Organizational" selected. A "Description" text area is also present. At the top right, there are "Cancel" and "Save" buttons. Red numbered callouts (1, 2, 3, 4) are placed over the form: 1 points to the Goal Name field, 2 points to the Category dropdown, 3 points to the Description text area, and 4 points to the Save button.

Figure 32: Adding a New Goal

1. Enter in the **Goal Name**
2. Select a due date (optional) and select a **Category** the goal falls under
3. Enter in a **Description** if desired
4. Once completed, select **Save** or **Cancel**

To edit the **Item Weights** select the Weights button. A fly-out appears:

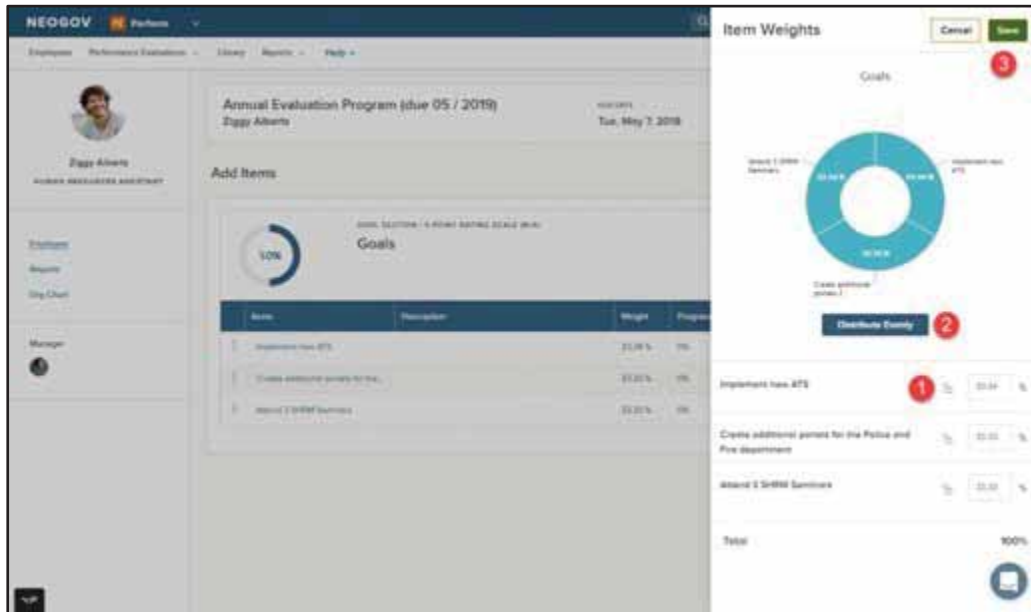


Figure 33: Item Weights

1. To edit an item, make sure the item is **unlocked**, then type in the desired percentage
 - a. Make sure the total amounts to 100%
2. To evenly weight all items, ensure all items are unlocked, then select **Distribute Evenly**
3. Once all updates have been made, select **Save**

Once all goals are added, click the **Complete Task** button. A fly-out appears of the Task Details. Add any comments, then select **Save**. Once saved, a green success banner appears at the top of the screen.

Employees can still add goals directly to an evaluation when in Draft status, even after the Add/Edit goals task is completed

Navigating to the Performance Evaluation List – Adding Goals in Bulk

Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGO**V in the top left corner. On the dashboard menu, select the drop-down menu, **Performance Evaluations**, and select **Performance Evaluation List**.

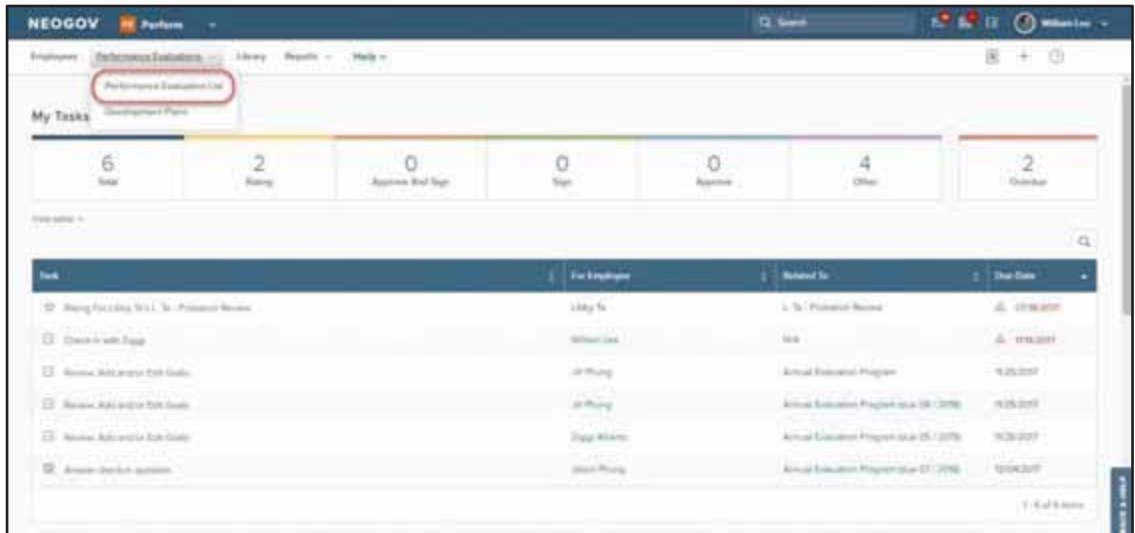


Figure 34: Performance Evaluation List

The Performance Evaluations List is a comprehensive list of your evaluations and your direct report's evaluations. From the list, you can bulk assign goals to different evaluations.

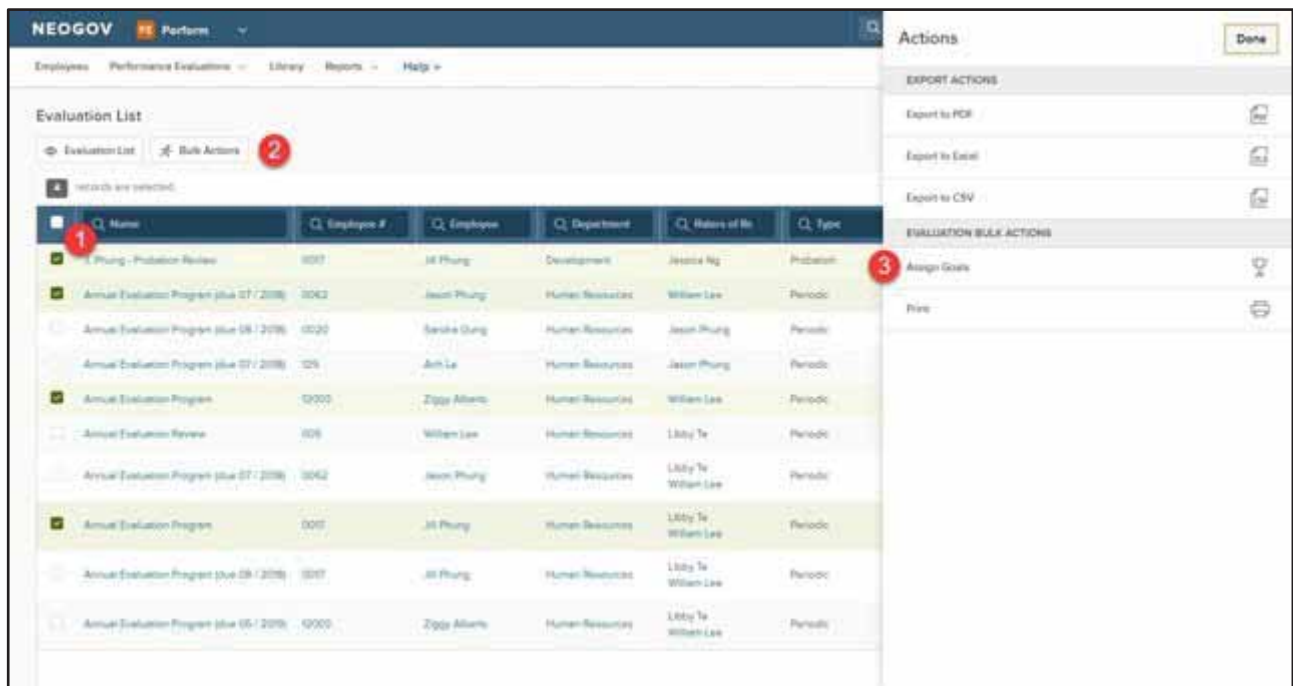


Figure 35: Bulk Actions

1. **Check the box** next to the name of the evaluation you would like to assign goals to
2. Select **Bulk Actions** once all appropriate evaluations have been selected
3. Select **Assign Goals** from the bulk actions fly-out

Once complete you are re-directed to Step 2 of 3: Goal Assignment.

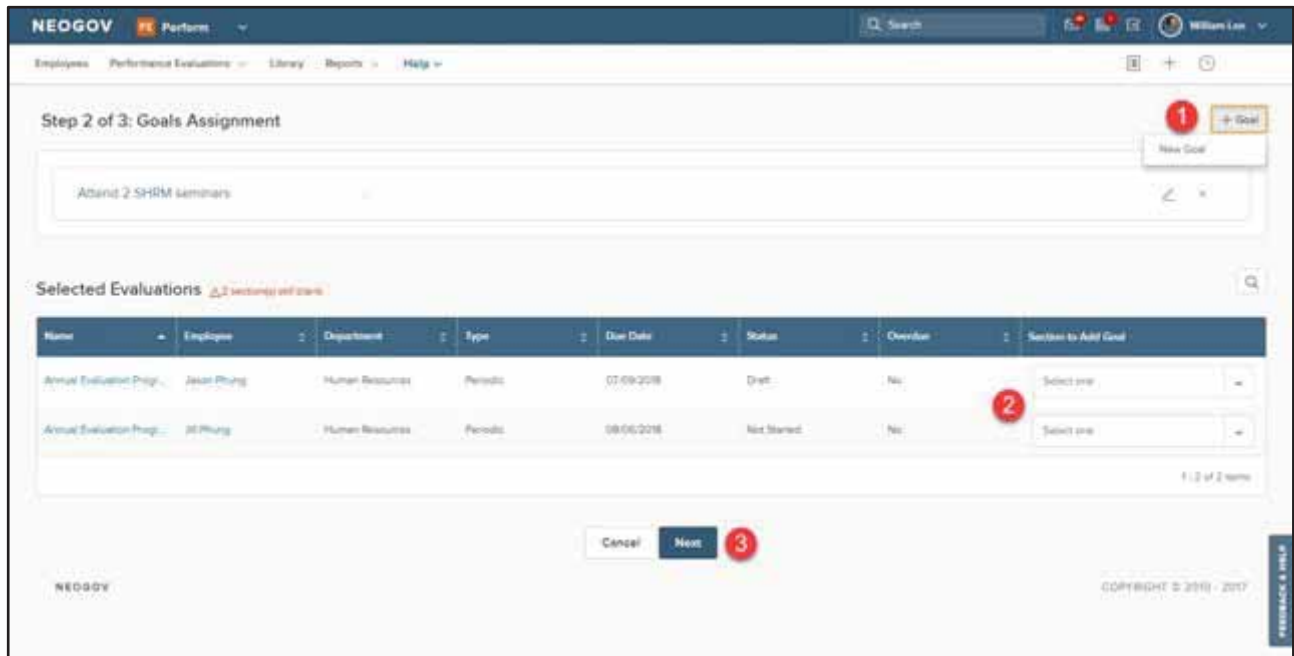


Figure 36: Bulk Assign Goals

1. Select **+ Goal** to add a new goal
2. Use the **Section to Add Goal** dropdown menu to choose where to add these goals
3. Once all goals have been added and the correct section selected, click **Next**

Only Evaluations that are in *Not Started, Draft, or Rating* are included in this process

Once all Goals are added you are re-directed to Step 2 of 3: Confirmation Page.

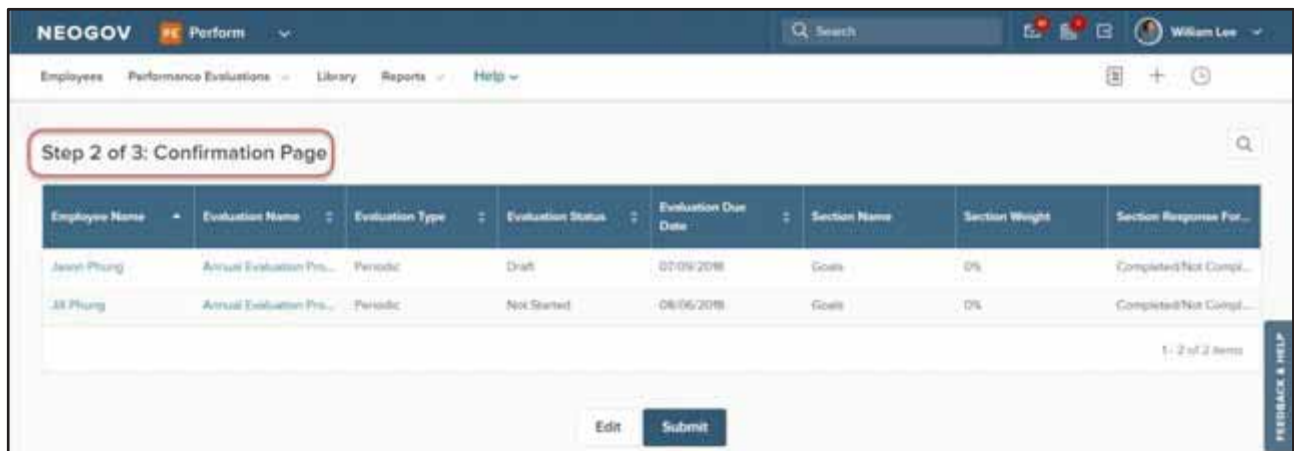


Figure 37: Confirmation Page

Review the information and select **Submit**.

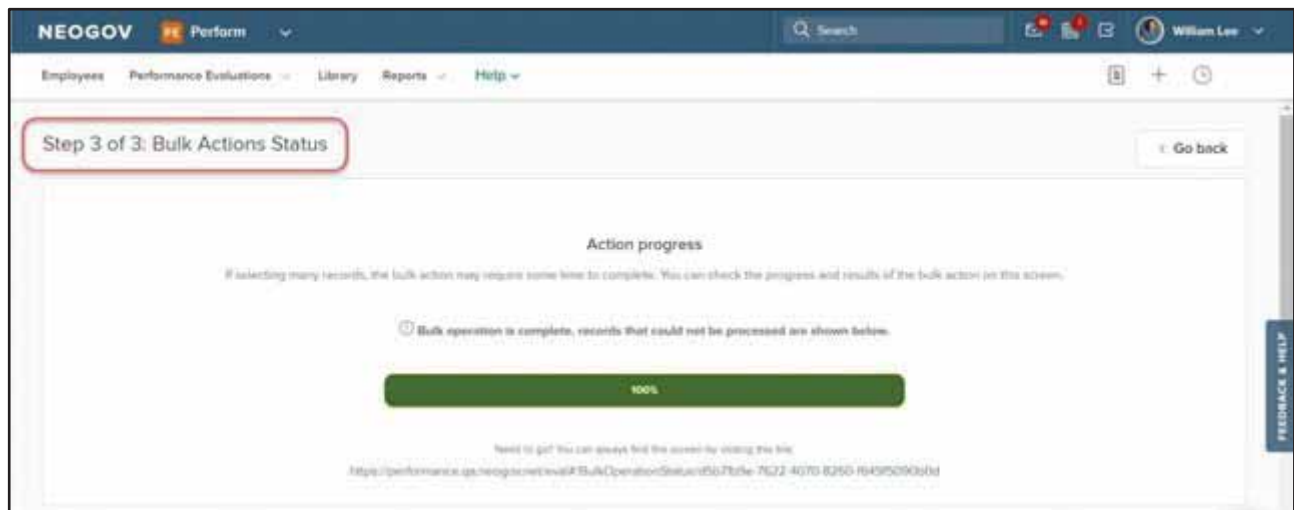


Figure 38: Bulk Action Status

When the action has processed, any failed records appear. All successful goals appear on the evaluation section denoted in step 2.

Rating Your Direct Report's Evaluation (Optional)

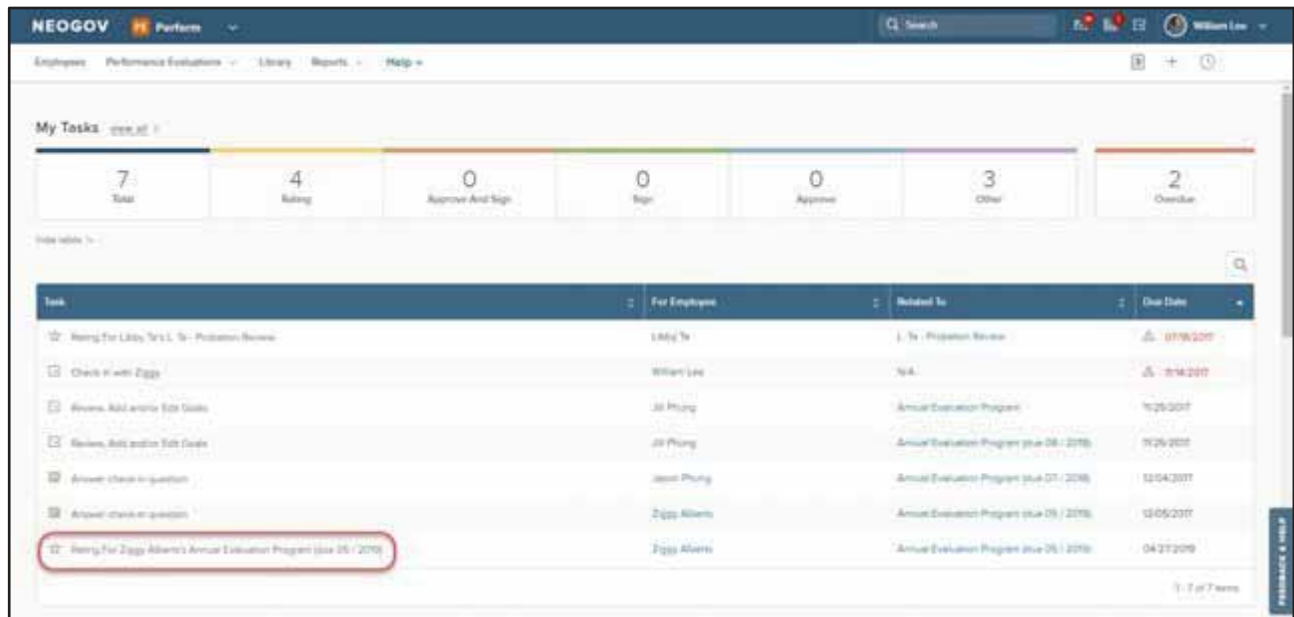
Who Should Use This Section

As a manager, you may be required to complete a rating for your direct reports. This section covers how to rate an evaluation and what useful tools you can use.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see a task to complete the **Rating**.

To complete a **Rating**, click the rating task name on the dashboard.



The screenshot displays the NEOGOV Perform dashboard. At the top, there is a navigation bar with the NEOGOV logo, a search bar, and user information for William Lee. Below the navigation bar, the 'My Tasks' section is visible, showing a progress bar with seven categories: Total (7), Rating (4), Approve And Sign (0), Sign (0), Approve (0), Other (3), and Overdue (2). Below the progress bar, there is a table of tasks. The task 'Rating For Zigg Adams's Annual Evaluation Program (due 05 / 2019)' is highlighted with a red box. The table has columns for Task, For Employee, Related To, and Due Date.

Task	For Employee	Related To	Due Date
Rating For Libby Terrell's - Promotion Review	Libby Ter	L. Ter - Promotion Review	01/06/2017
Check in with Zigg	William Lee	N/A	01/04/2017
Review, Add and/or Edit Goals	Jill Phung	Annual Evaluation Program	11/26/2017
Review, Add and/or Edit Goals	Jill Phung	Annual Evaluation Program (due 08 / 2018)	11/26/2017
Answer check-in question	Jessie Phung	Annual Evaluation Program (due 07 / 2018)	11/04/2017
Answer check-in question	Zigg Adams	Annual Evaluation Program (due 05 / 2019)	11/05/2017
Rating For Zigg Adams's Annual Evaluation Program (due 05 / 2019)	Zigg Adams	Annual Evaluation Program (due 05 / 2019)	04/27/2019

Figure 39: Rating Task

The link re-directs to the Rating Form.

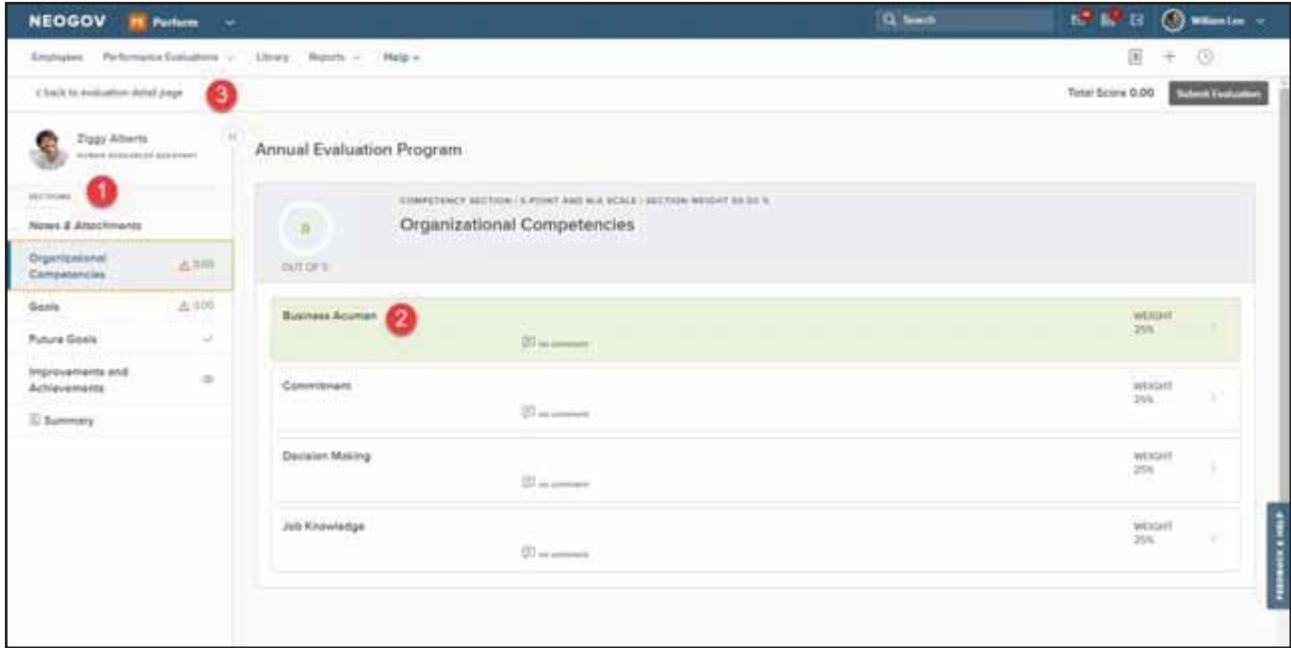


Figure 40: Rating Form

1. To **view and rate** different items, click the various sections
2. To rate an item, click an item name, e.g. *Business Acumen*, within a section, and a fly-out of the **Rating Card** appears (see below for further information)
3. To leave the rating card and return back to the evaluation detail page, select **back to evaluation detail page**

The following legend can be used to identify the different symbols in the evaluation sections:

	= Required section, action required
	= Read only
	= Section completed

Figure 41: Evaluation Symbols

Upon selecting the item name, the rating card fly-out appears.

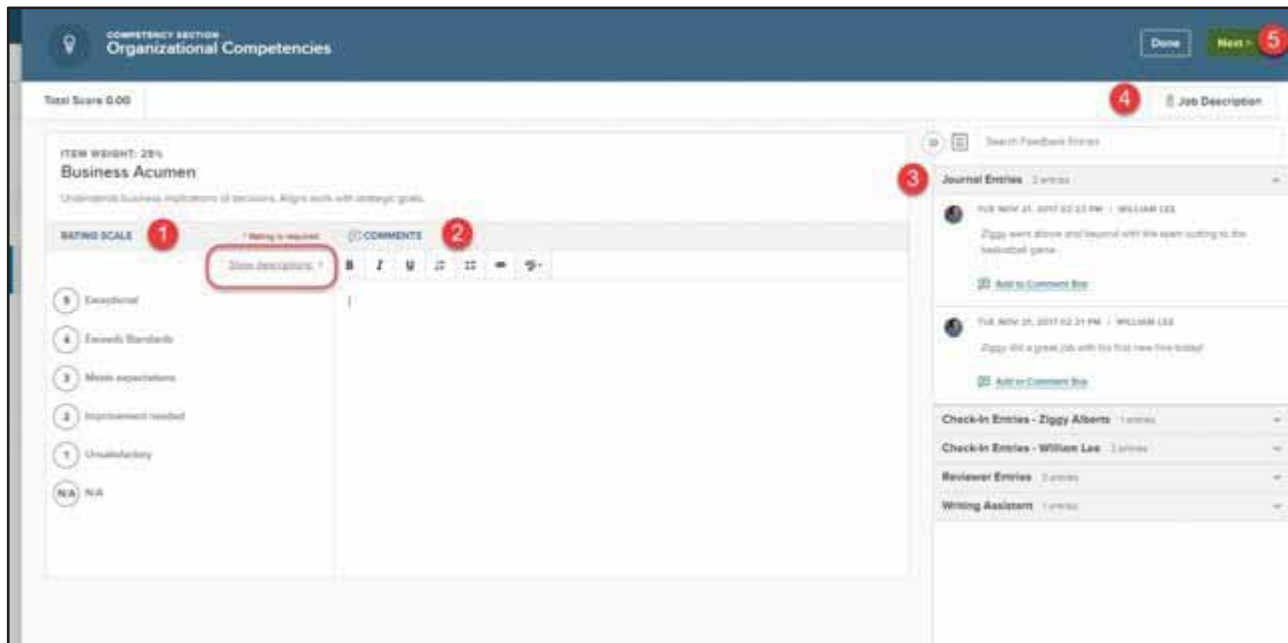


Figure 42: Rating Card

1. If provided by HR, 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
2. Type any text into the **Comments** box, as needed. Edit text using the rich text editor provided
 - a. Per HR configuration, if a comment is required the box is highlighted in red
 - b. While rating, the system auto saves all progress made
 - c. If needed, you may exit out of the rating card and resume rating at a later time
3. The **Feedback Entries** appear on the right side of the rating card. If available, you see **Journal Entries**, **Check-In Entries**, **Reviewer Entries**, and **Writing Assistant**. 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
 - a. Any **Journal Entries** created by you or shared by another employee appear here
 - b. If **Writing Assistants** have been provided by HR, the writing assistant section also appears
 - c. If any previous reviews have been made, they appear in the **Reviewer Entries** section
 - d. If **Check-Ins** are a part of your process, then the check-in comments appear
4. Per HR configuration, you can see detailed information about your position by selecting **Job Description**

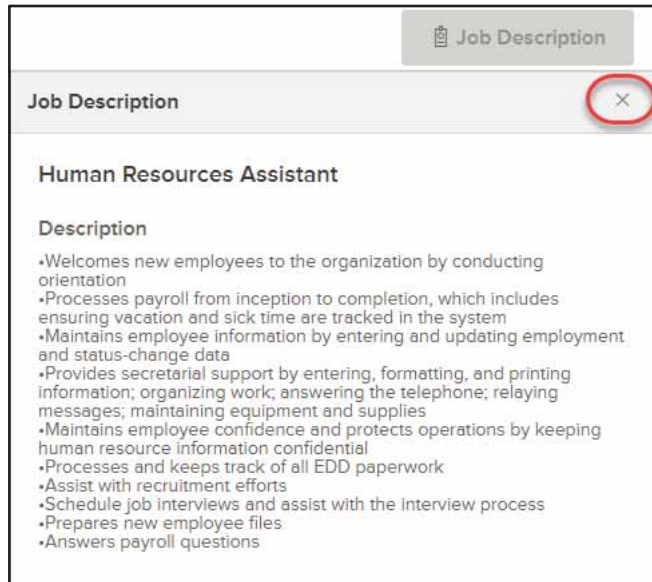


Figure 43: Job Description

To exit out of the Job Description, select the 'X' icon, which redirects you to the Feedback Entries view.

The Overall Rating is determined per your agency's evaluation process. You may be required to select an Overall Rating for the evaluation, or the Overall Rating defaults automatically without any ability to change. In other cases, there is no Overall Rating scale and only comments can be entered

View a Summary of all ratings, in a side-by-side comparison.

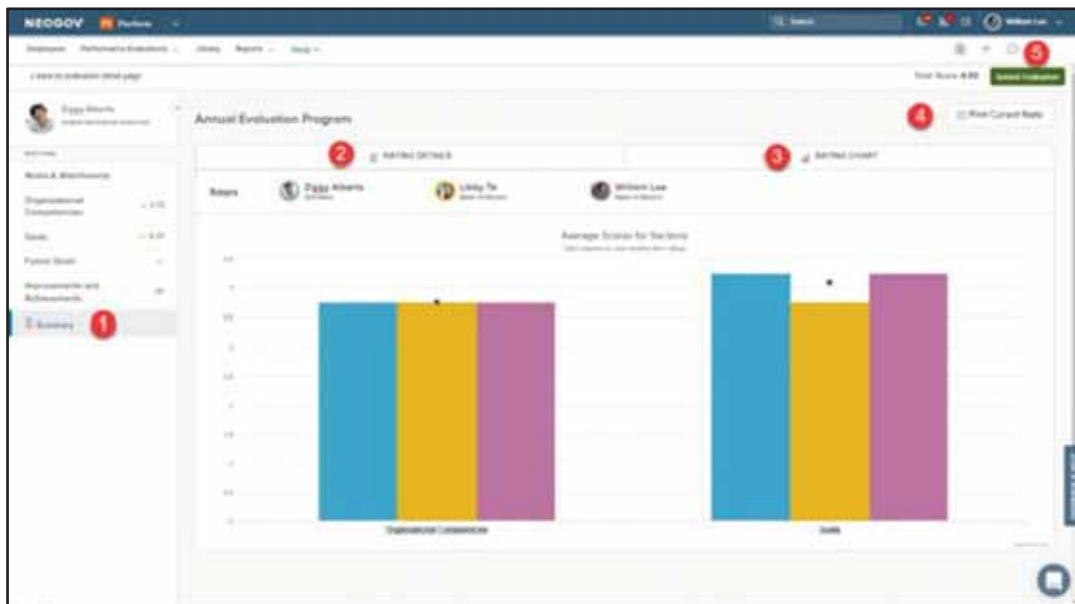


Figure 44: Evaluation Summary

1. Select the **Summary** section
2. Review the details of the evaluation including your ratings and comments in the **Rating Details** tab
3. To see a comparison of scores (if numeric scoring is used), view the **Rating Chart** tab
 - a. Select any portion of the graph to see the ratings broken down into each item rated
4. To print the current state of the evaluation, select **Print Current State**
5. Once you have reviewed the evaluation, select **Submit Evaluation**

Once all required rating and/or comments are complete, select the **Submit Evaluation** button in the top right corner.



Figure 45: Evaluation Submitted Message

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**.

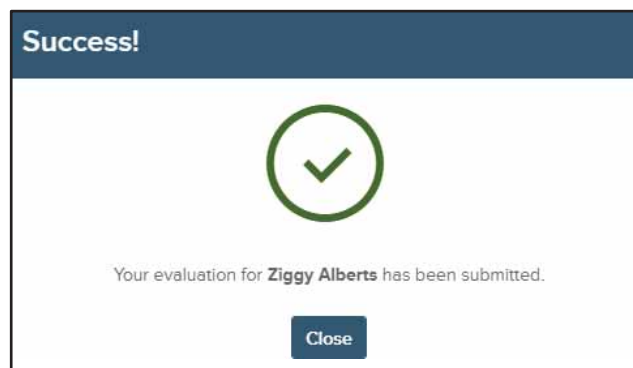


Figure 46: Evaluation Submitted Success Message

Once your evaluation has been successfully submitted, your Manager is notified.

To complete a self-evaluation rating, follow the steps in the same manner outlined above

Approving and Signing an Evaluation (Optional)

Who Should Use This Section

After all Raters have completed their rating, you may have to **Approve and Sign** the evaluation before it is released to the employee. If you are required approve and/or sign, you will receive an email notification and the task will appear on your dashboard.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see the task to **Approve and Sign** the completed evaluation.

Click the **Approve and Sign** task from the task list on your Dashboard. If there are multiple tasks requiring your action, you can use the **Approve & Sign** filter to limit the tasks displayed on your Dashboard.

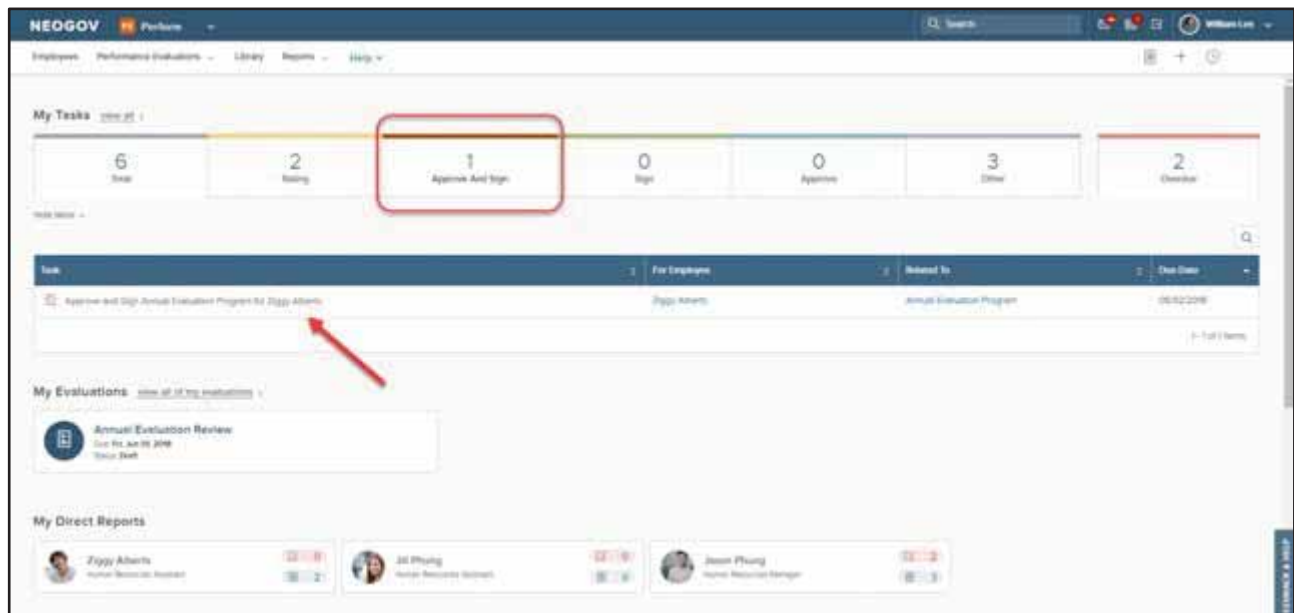


Figure 47: After Rating Signature Task

The approval page displays.

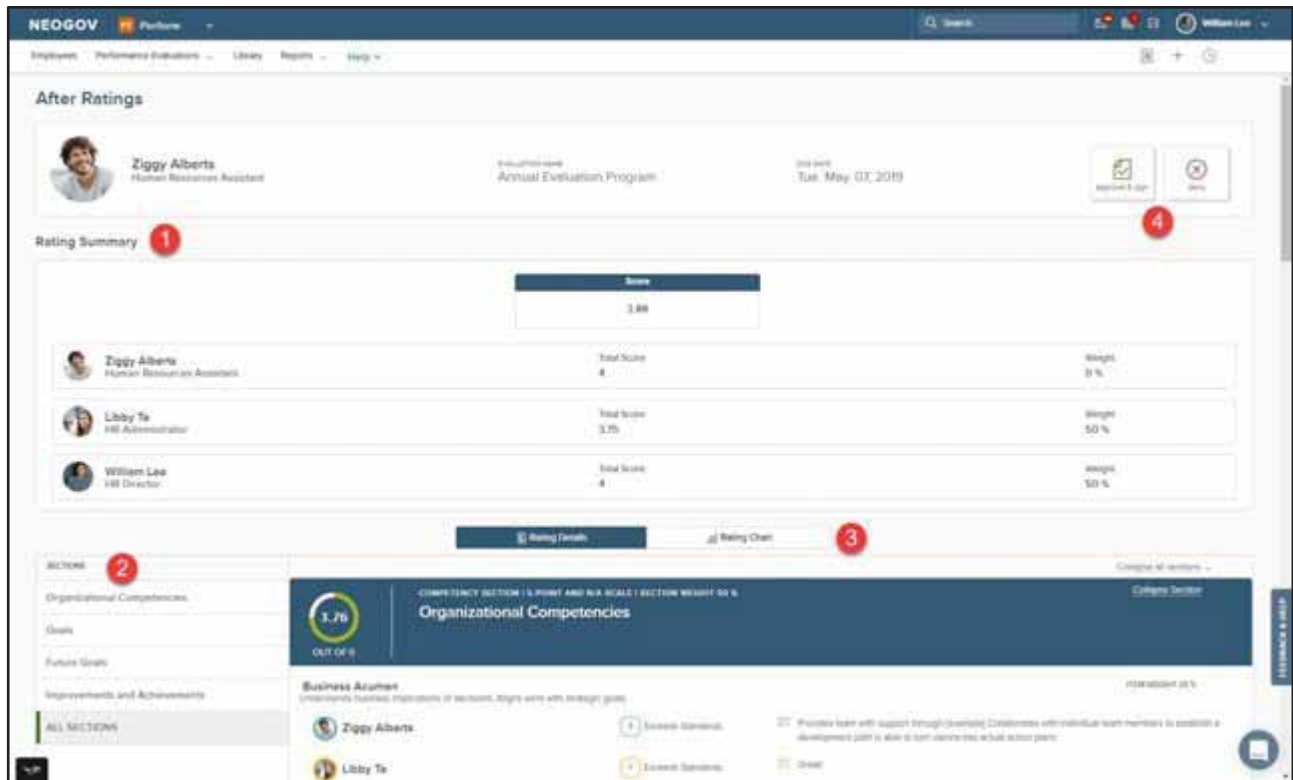


Figure 48: After Ratings Form – Signature Task

1. **Rating Summary:** Displays the overall score and all raters with their respective scores
2. Navigate through the various **Sections** by clicking on the name
 - a. Scroll through each section to review the ratings and any comments provided
3. Toggle between the **Rating Details** or the **Rating Chart**
 - a. The Rating Chart displays a bar graph of all raters
4. Once you have reviewed the evaluation, select **approve & sign**, or **deny**
 - a. If deny is chosen, based on HR configuration, you are required to select which rater to send the evaluation back to, and you must enter in a comment

To make changes to the evaluation you've submitted for your direct report, deny the evaluation to **HR** open the rating task. Once the evaluation is re-submitted, all approvals and signatures are re-triggered

Once you have reviewed the evaluation and select the **approve & sign** button, a fly-out appears.

The screenshot shows a modal window titled "Approve & Sign". At the top right, there are two buttons: "Cancel" and "Submit". Below the title is a section labeled "Comments" with a text area containing the placeholder "Write comment here...". Underneath is a section titled "Please sign your name below" which contains a signature box. The signature box displays a blue cursive signature "William Lee" above a horizontal line. Below the line, the text "William Lee" is on the left and "November 22, 2017" is on the right. At the bottom of the signature box, there are two links: "Auto-Generate" and "Draw Signature".

Figure 49: Approve and Sign

Enter in any comments, sign and submit. Once approved, a green success banner appears and you are re-directed to the evaluation page. The evaluation has been successfully approved and signed. An email is generated to the next approver in the process. If you are the last approver/signature in the process, the evaluation status changes to **Completed**.

Reports

Who Should Use This Section

Managers who wish to run reports on employees within their managerial hierarchy. All reports can be exported and printed.

Navigating to Reports

On your dashboard menu, you see the **Reports** header. Hover over the menu and select **Reports**.

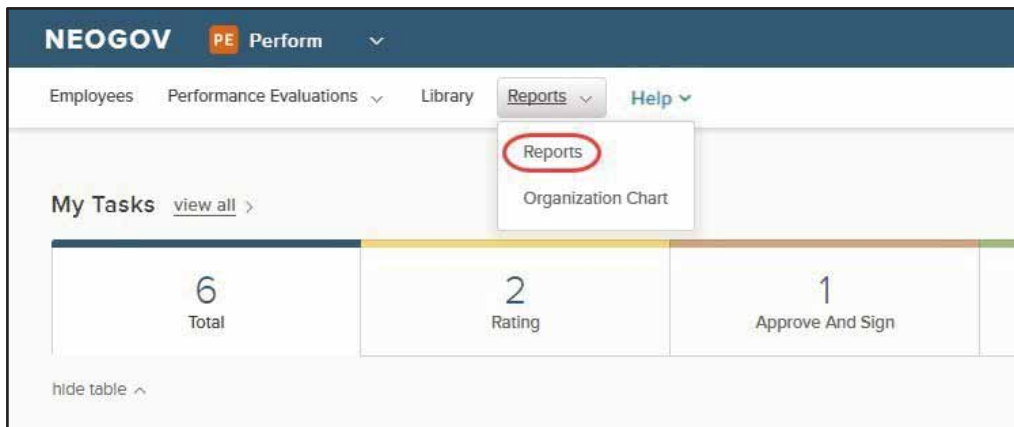


Figure 50: Reports Menu

You are now in the Reports page. A list of all pre-defined reports is displayed.

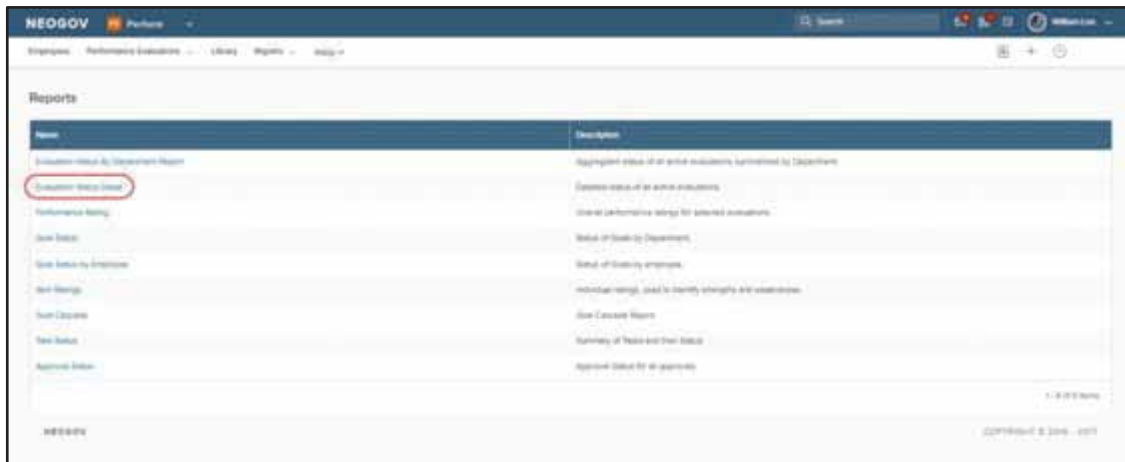


Figure 51: Reports

To run a report, click the report name. In this example, we use the **Evaluation Status Detail** report.

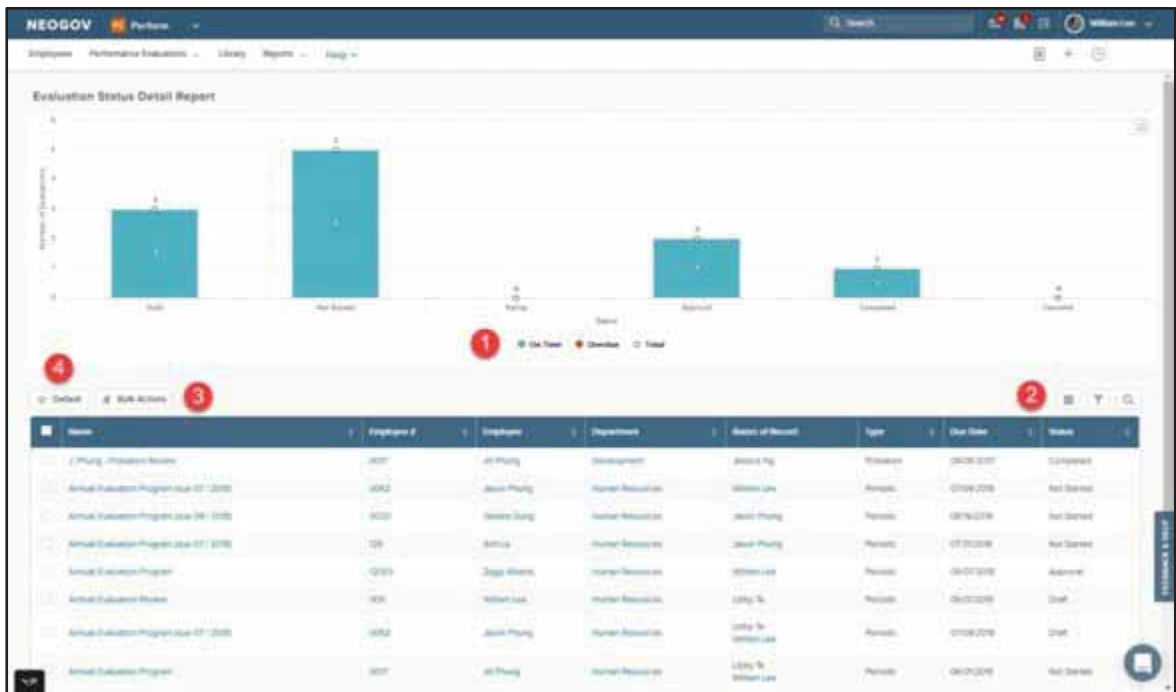





Figure 52: Evaluation Status Detail Report

1. Click any section on the **graph** to filter the list below
2. Add **Columns** , **Filter**  on any item, or **Search**  any column
3. To export the grid, select the desired records by checking the box and then select **Bulk Actions**
 - a. You can export the grid in a CSV, PDF, or Excel file
4. To save a customized view, select **Default**

To customize the report, start by selecting the Column icon  .

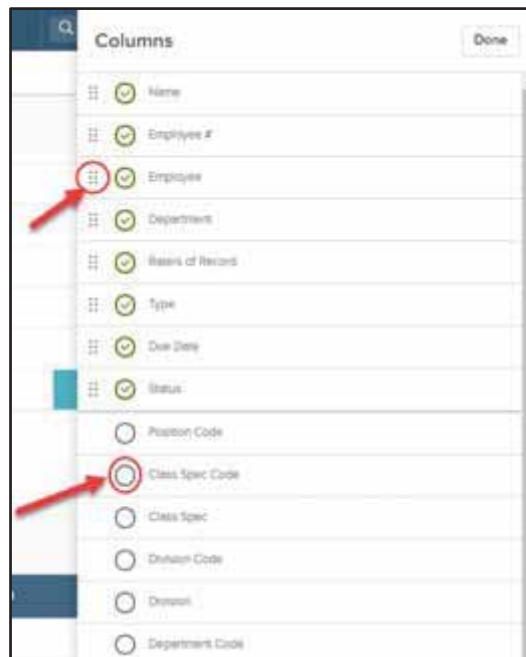



Figure 53: Columns

A fly-out appears with all the fields that can be added to the report. Select the circle to add to the list, or select a checkmark to remove. Use the  icon to rearrange fields. Once you have configured your columns, select **done**.

If you need to export this report often, you can use the **Schedule Export** feature. By using this feature, the system automatically exports the report and emails you per your configuration.

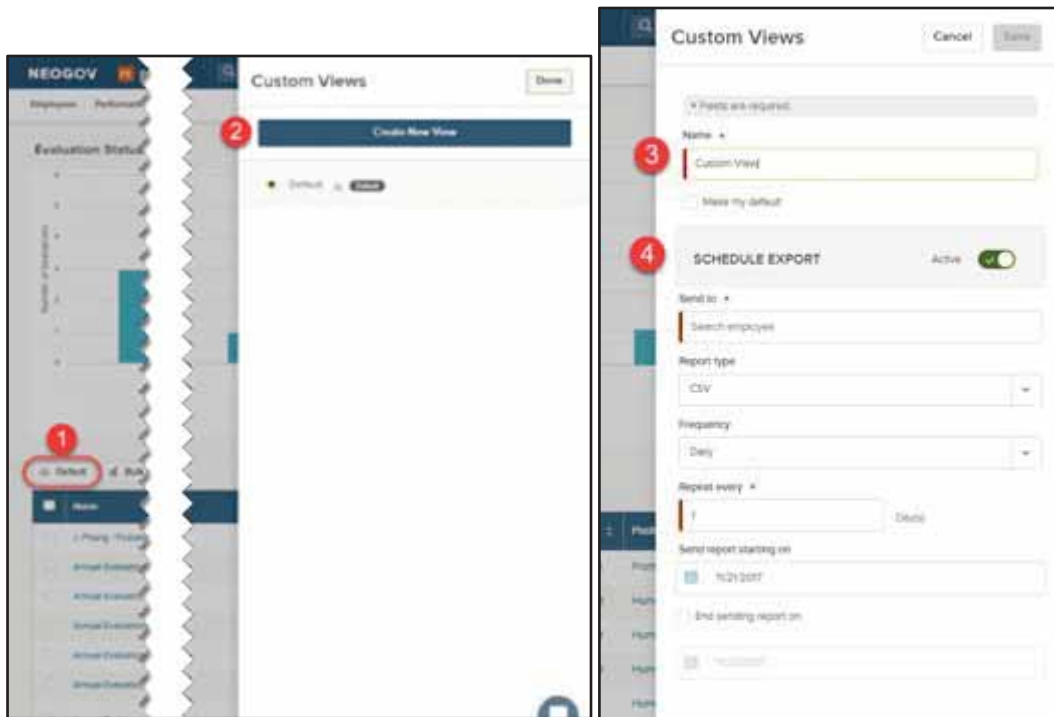


Figure 54: Custom Views

1. Once you have customized and configured your report to your liking, select **Default**
2. A fly-out appears. Select **Create New View**
3. Next, **Name** the custom view
4. Enable **Schedule Report** by selecting the toggle
 - a. Enter in all the appropriate and required information:
 - i. Which **employee** to send the report to
 - ii. The **report type** (CSV, Excel, PDF)
 - iii. The **frequency** for the system to generate the reports
 1. How often you would like it to **Repeat**
 - iv. Define the **start** and **ending** date of the report

The Schedule Export feature is available on the Evaluation Status Detail, Performance Rating, Tasks Status, Item Ratings, and the Evaluation Status by Department Report

Select **Save** when all configuration is complete. The **default** title has now changed to your custom name.



Figure 55: Switch Views

1. Select the custom view name predefined in the previous steps
2. Select **Default** and save

The most commonly used reports by Managers are the **Evaluation Status Detail** report, the **Performance Rating** report, and the **Task Status** report

Tips and Tricks

Any manager who is a new or avid user of the Perform system. This section covers best practices within the system.

Troubleshooting Browsers

All users are highly encouraged to use one of three supported browsers:

- **Google Chrome**
- **Internet Explorer 11 or higher**
- **Microsoft Edge**

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered are unlikely to be resolved.

If you encounter any issues, the first step in trying to resolve the issue would be to clear the browser's *cookies and cache*. To do so, select:

- **Ctrl + Shift + Delete**

This fix solves most user issues. If this still does not fix the issue, try using a different supported browser.

If you are still encountering the issue, please take any relevant screen shots of the issue, such as an error message, and send this to your HR Admin. Include as much information as possible.

If you forget your password or username and use the Forgot password or username links, please check your spam inbox as sometimes the emails get filtered into there. If the email is not in there, please report to your HR Admin.

FAQs

1. Where can I view my completed evaluation?

Once an evaluation has been released to you, you can view the evaluation from the Performance Evaluation Detail page. To view your score, all ratings, and comments from Raters and Approvers, click on the Print icon.

2. Where can I reset my password or username?

When logging in to NEOGOV, there is a Forget Password and Forget Username link. Select the correct link and follow the directions. If you want to change your password, you can click the drop-down list associated with your name in the upper right-hand corner > Account Settings and enter the new password. The original password must be input first before changing. Please note that your account must be activated in order to reset your password or username. If your account has not been activated, please contact your HR Admin.

3. How can I find out what browser I am using?

To find out what browser you are using, please go to <https://www.whatsmybrowser.org/>