STATE CENTER
COMMUNITY COLLEGE DISTRICT

NEOGOV Perform

Employee Training Guide

January 2018

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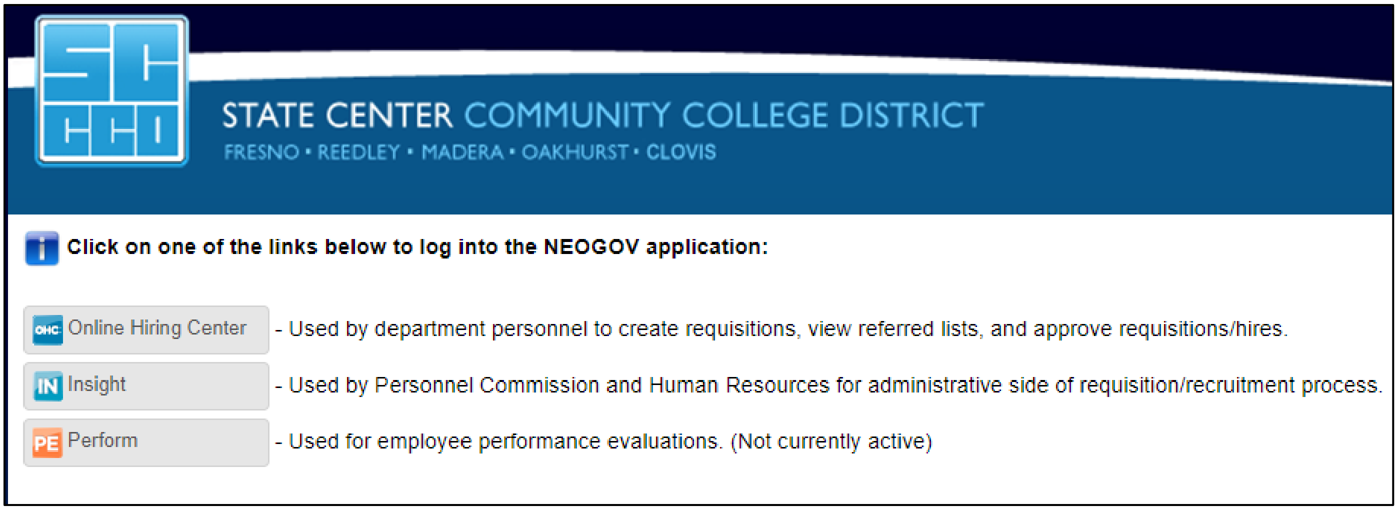
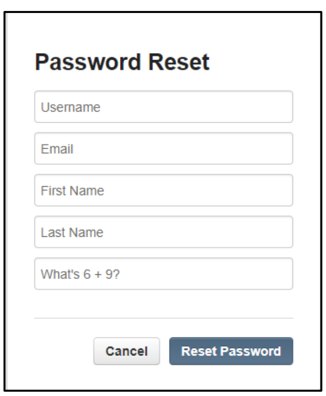
SECTION 1 - LOGIN

1. If using a device on the district's network, go to the district's [NEOGOV single sign-on page].



Click on the button that says **Perform** to access your evaluation dashboard**.**

2. If using a device outside the district's network, go to the [NEOGOV website].



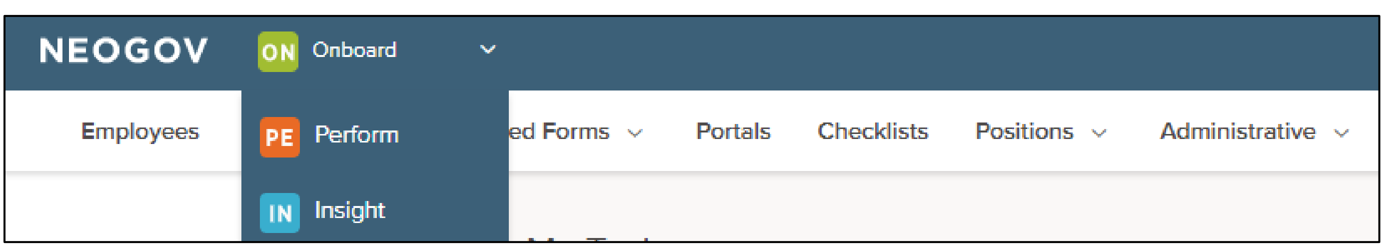
Enter your username and password then click **Log In.**

Your username should match your computer login (eg. FL001) but your password will be whatever you last set it as.

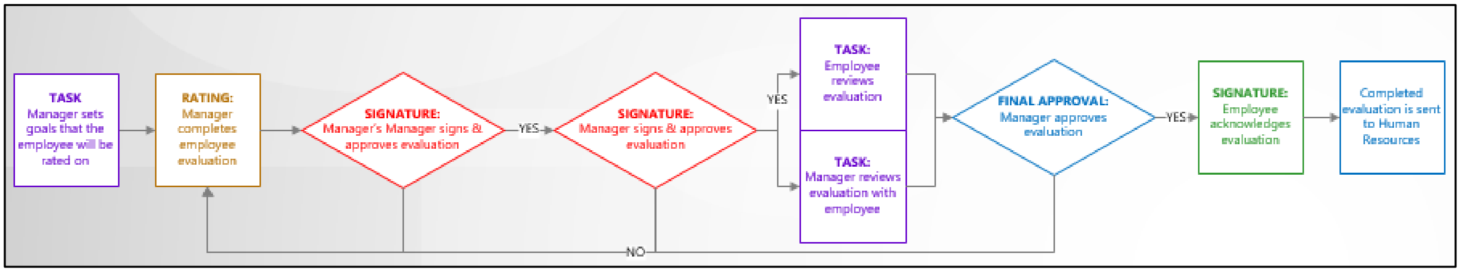
If you do not know or forget your password, click the "**Forgot your password?**" link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.

NOTE: Passwords must be a minimum of eight (8) characters and contain at least one number, one upper case letter, one lower case letter, and a special character.

Since we also use the Onboard module, once you log in you may need to use the App Menu in the top left to toggle over to Perform.



SECTION 2 – EVALUATION PROCESS



BEFORE RATING

Set Goals to record PROGRESS ACHIEVED
Manager

These are previous goals the employee will be rated on during the evaluation. There is a separate section to set future goals.

RATINGS

Rating
Manager

Includes sections for rating competencies, recording narratives, progress achieved, and setting future goals.

AFTER RATINGS

Approval & Signature
Manager's Manager

Approval & Signature
Manager

Before the evaluation becomes visible to the employee, both the manager and the manager's manager must approve and sign the evaluation. If the evaluation is denied at either point, it returns to the manager's rating.

Release evaluation to employee

Review Evaluation with Employee
Manager

Review Evaluation Prior to Meeting with Manager
Employee

These tasks are assigned at the same time and both must be completed before moving on to the next step in the approval process.

Approval
Manager

After meeting with the employee, changes may need to be made to the evaluation. This final approval allows managers to deny the evaluation and send back to rating stage if necessary. When denied, the evaluation will go through all approvals again.

Signature
Employee

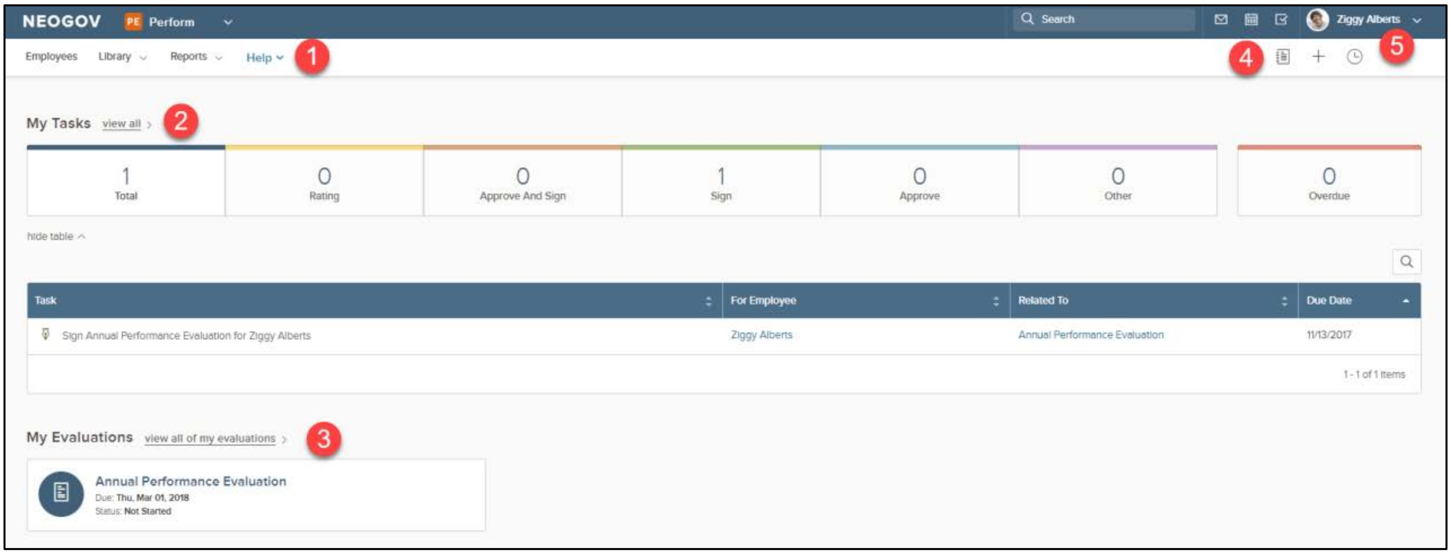
The employee must sign and acknowledge completion of their evaluation. At this point, they may submit their own comments.

Annual/Biennial evaluations will populate 365 days prior to the due date so that you may easily track evaluations throughout the year. You will not be able to start the actual rating until 3-months prior to the evaluation due date. All probationary evaluations will populate upon the employee's hire. You will receive email notification when your action is required. Reminder and overdue notices will also be sent as needed. Step Progression Hold evaluations will be populated by HR as needed.

SECTION 3 - NAVIGATING THE DASHBOARD

Evaluation Dashboard

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



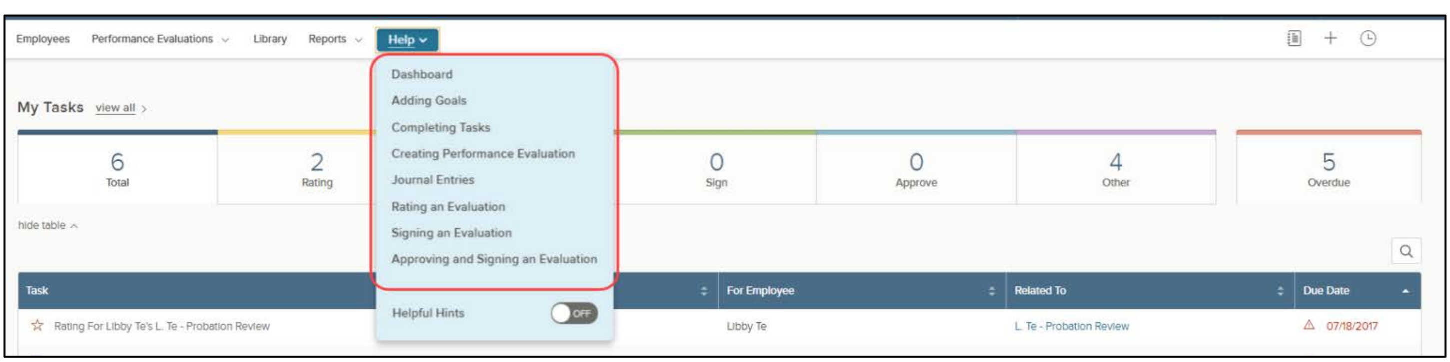
1. **Dashboard Menu:** Based on HR Configuration you see the following tabs:
   - The **Employees List**
   - The **Library**
   - **Reports**
   - **Help**
2. **My Tasks:** Contains all tasks currently requiring your action
   - Color-coded boxes located within this section can be used to filter the various task types
3. **My Evaluations:** Displays your three most recent performance evaluations (if applicable)
4. **Journal Hub:** Contains all Journal Entries that you have created, as well as any pending entries
5. **My Profile:** Access your Talent profile, update your password, and sign out of Perform.

In-App Help

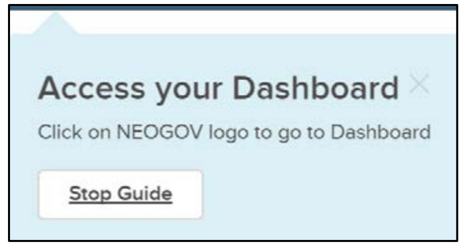
Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

Using In-App Guidance

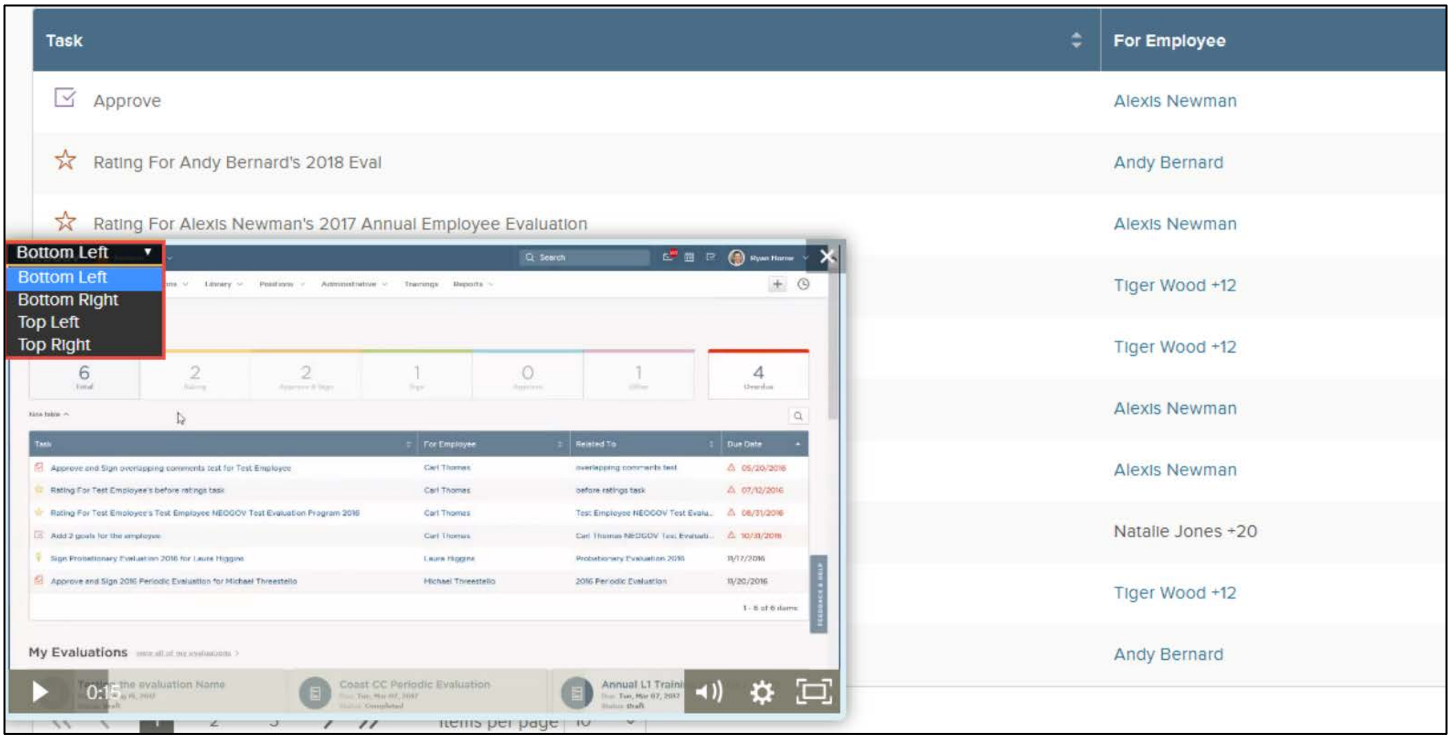
There is a **Help** menu accessible to all users. Hover over the Help icon to view a list of common actions.



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.



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

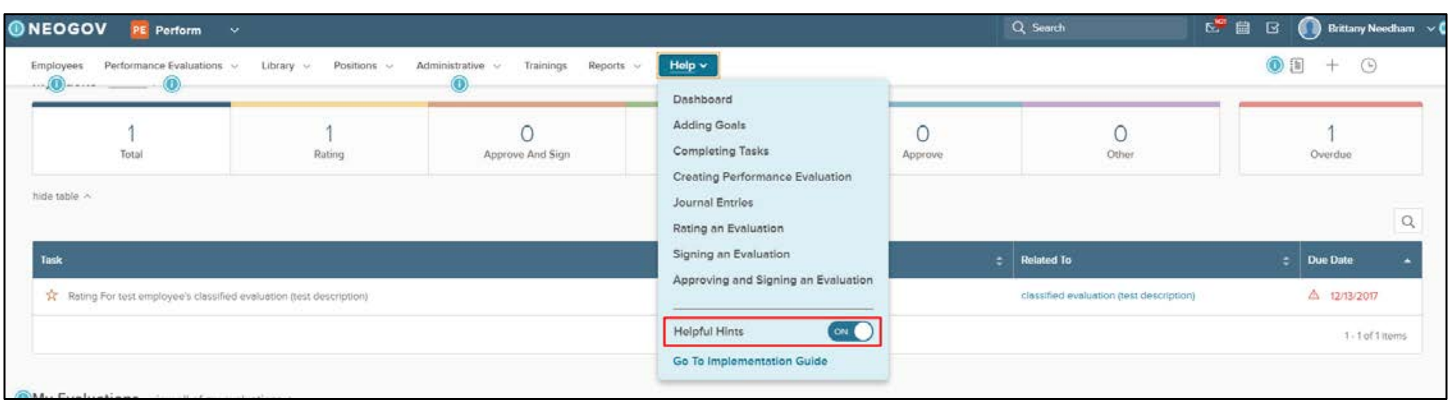


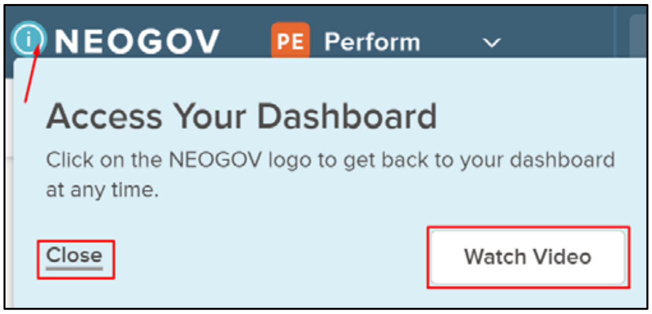
NOTE: If you leave the page playing a tutorial, the tutorial closes and is not available on the next page.

Using Helpful Hints

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 icons display throughout Perform in areas where users might need more assistance.





Click on a Helpful Hint icon 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**

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.

1. **View All:** Select this to view tasks that are Current, Completed, Canceled, Pending, and Skipped
    - **Current:** Tasks currently requiring action
    - **Completed:** Tasks you've already acted on
    - **Canceled:** Tasks no longer required
    - **Pending:** Tasks pending another user's action, or tasks for *Draft* evaluations
    - **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
    - For more information, please refer to *Section 4*

The task types are designated as follows:

- **Total:** All tasks currently requiring your action.
- **Rating:** Any rating required on an evaluation.
- **Approve and Sign:** Task to approve & sign the evaluation, after it's been rated.
- **Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated.
- **Approve:** Task to approve the evaluation, after it's been rated.
- **Other:** Any manual task such as having a meeting with your manager or adding goals to an evaluation.
- **Overdue:** Any task with a past due date.

	= Rate an evaluation
	= Approve and sign
	= Sign
	= Approve an evaluation
	= Other or Manual tasks

My Evaluations

Underneath the tasks section of the Dashboard is the **My Evaluations** section. Here classified employees will find their three most recent performance evaluations. Select any one of the three evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation.

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

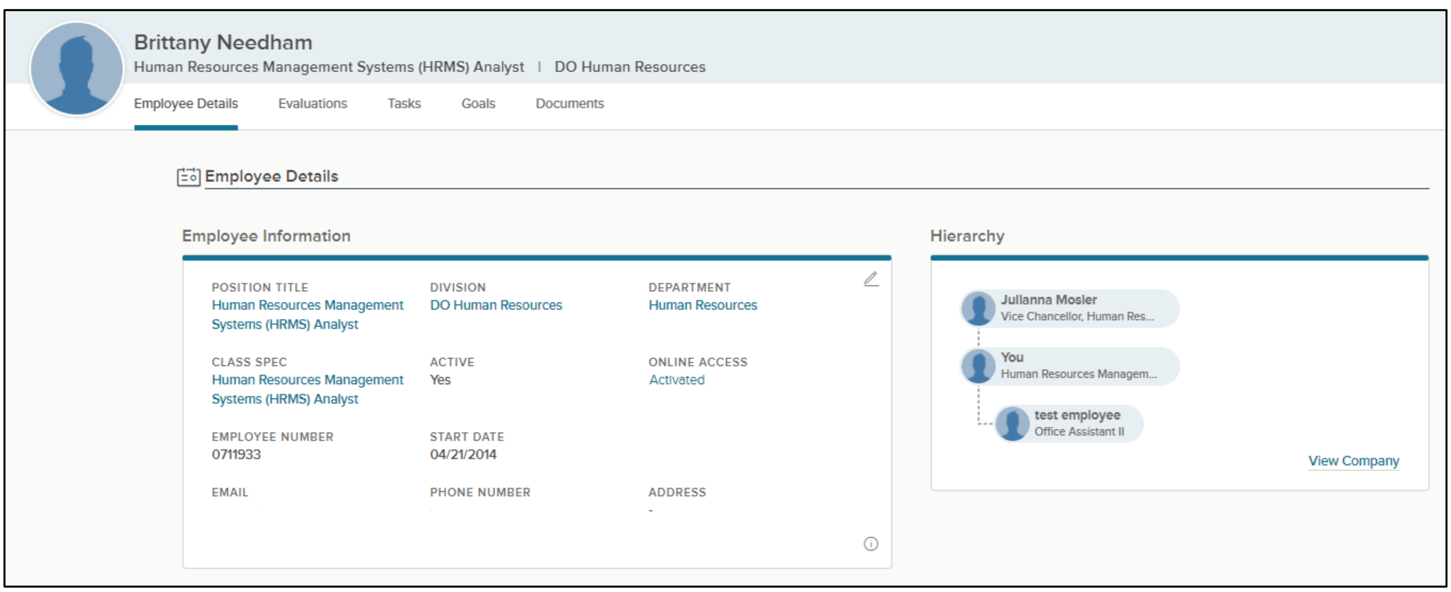
Journal Hub

All users have access to their **Journal Hub.** The Journal Hub is a central location where you can find all Journal Entries that you have created.

For more information, please refer to *Section 6*.

My Profile

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

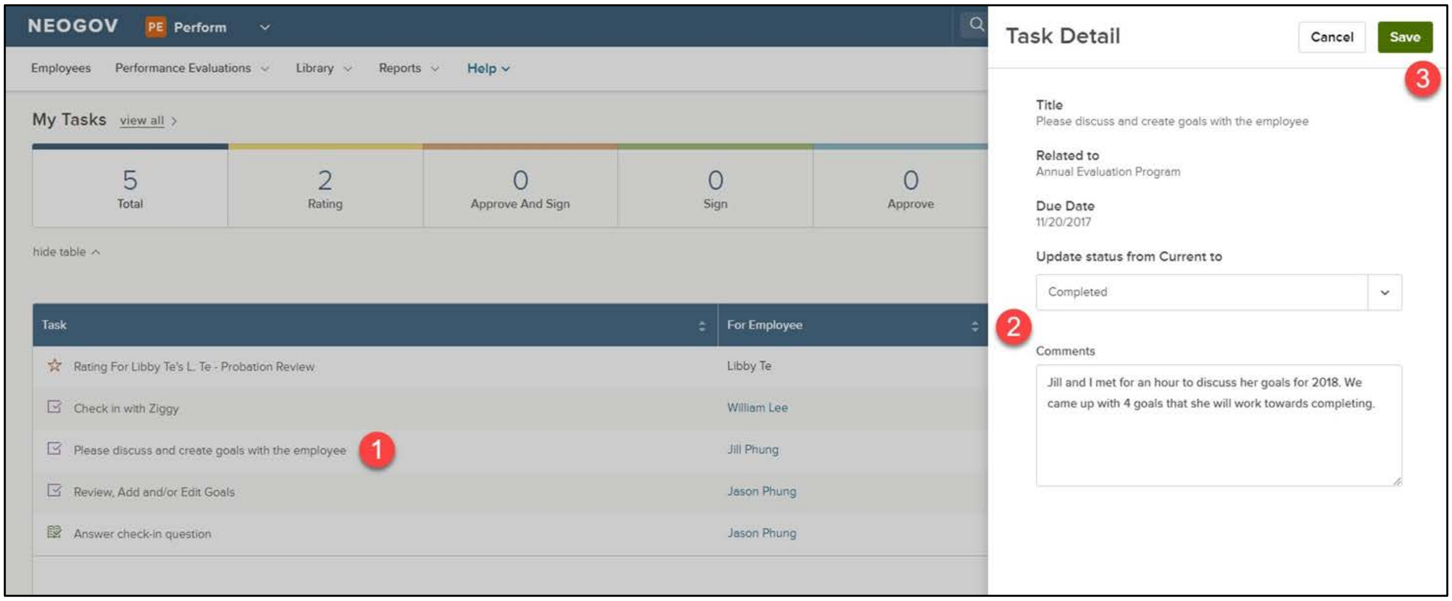


From **My Profile**, you can see any Performance Evaluations, goals, and all tasks that are associated to you. Note, you can also add journal entries from this page. For information on adding journal entries, refer to *Section 6.*

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

SECTION 4 – COMPLETING A TASK

To complete a task, navigate back to the **My Tasks** section of your Evaluation 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.



1. Click into the corresponding **Task Name** from the list
   - 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
   - The status defaults to **completed**
   - Enter any **comments** as necessary
3. When you have completed the task, select **Save**
   - You receive a green banner once the step has been completed

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

SECTION 5 –SIGNING AN EVALUATION

When the evaluation has been completed by all parties, including raters and approvers, you will be asked to sign the evaluation acknowledging that you have received and reviewed the content.

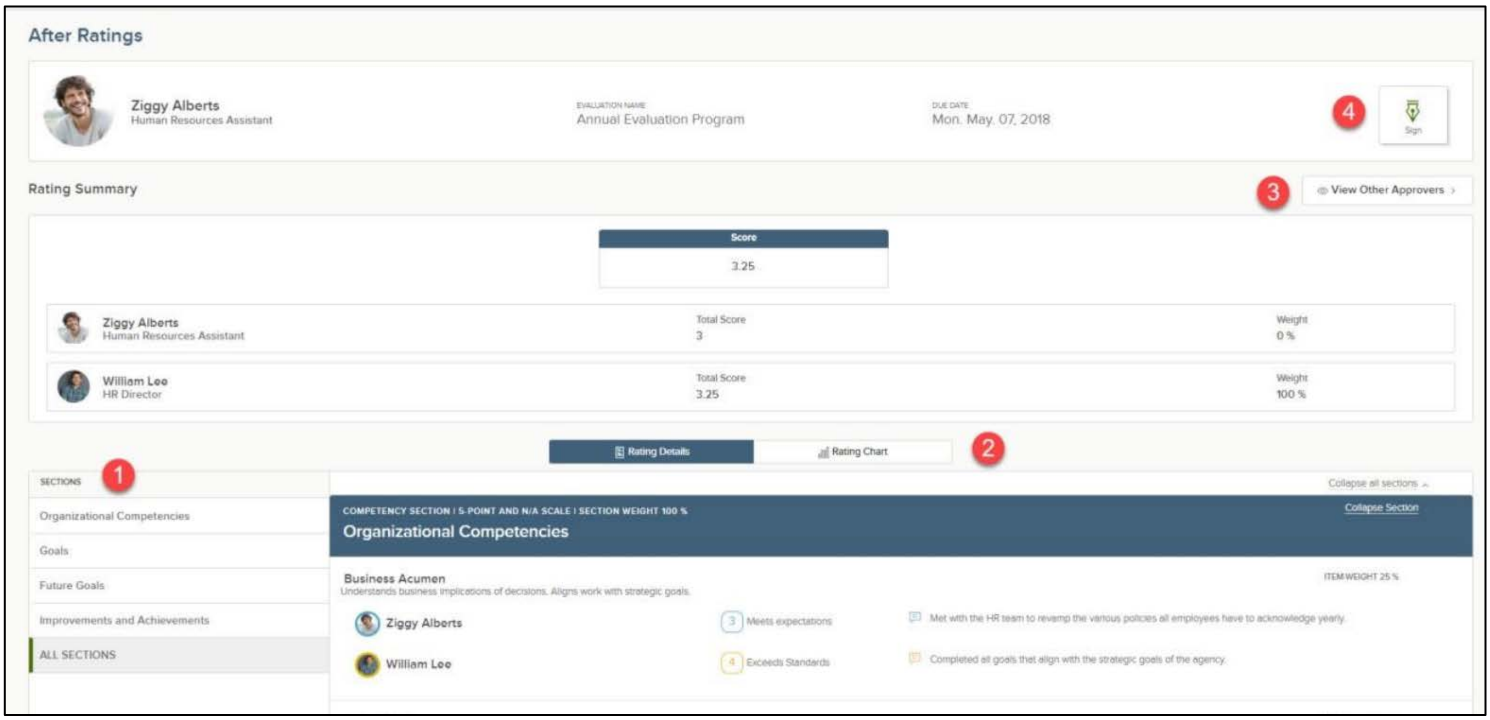
My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner. Here, you see the task to **Sign** the completed evaluation.

Click the **Sign** task from the task list on your Dashboard.

TIP! If there are many tasks requiring your action, you can use the **Sign** filter box to limit the tasks displayed on your Dashboard.

Navigating the Signature page

You are redirected to the After Ratings Form.



1. Navigate through the various **Sections** by clicking on the name
   - Scroll through each section to review the ratings and any comments provided
2. Toggle between the **Rating Details** or the **Rating Chart**
   - The Rating Chart displays a bar graph of all raters
3. To view other approvers and the status of their task, select **View Other Approvers**
   - A fly-out appears with all other approver information
4. Once you have reviewed the completed evaluation, select the **Sign** button
   - A fly-out appears with the signature box and an optional comment section

Once you have signed the evaluation, an Evaluation Acknowledged banner appears at the top of your screen..

SECTION 6 – JOURNAL ENTRIES

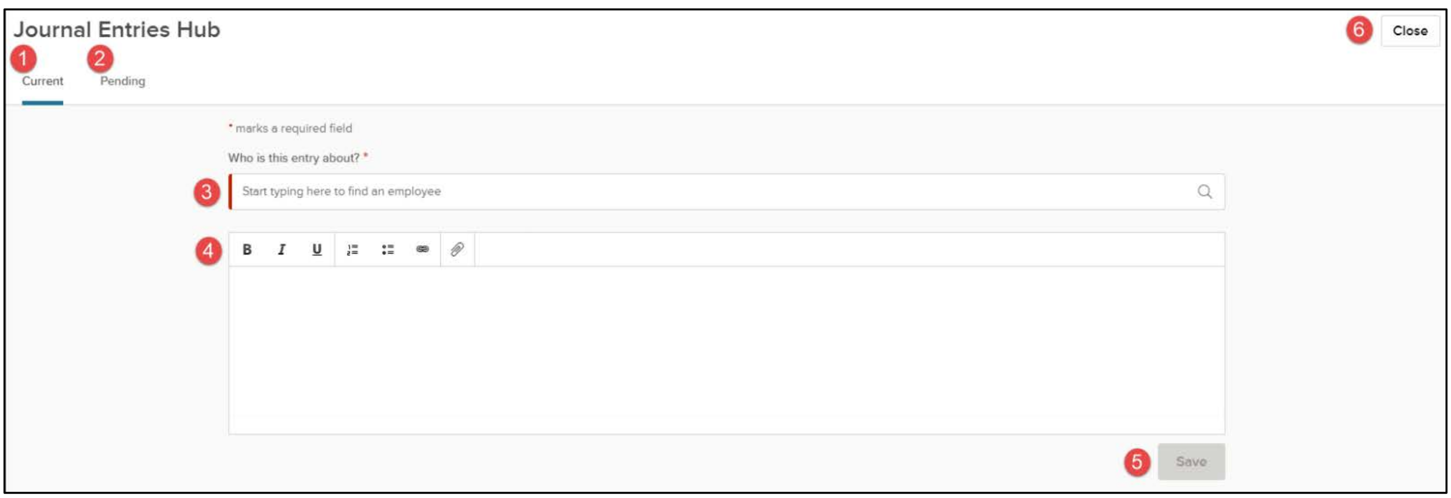
Navigating to Journal Entries

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!

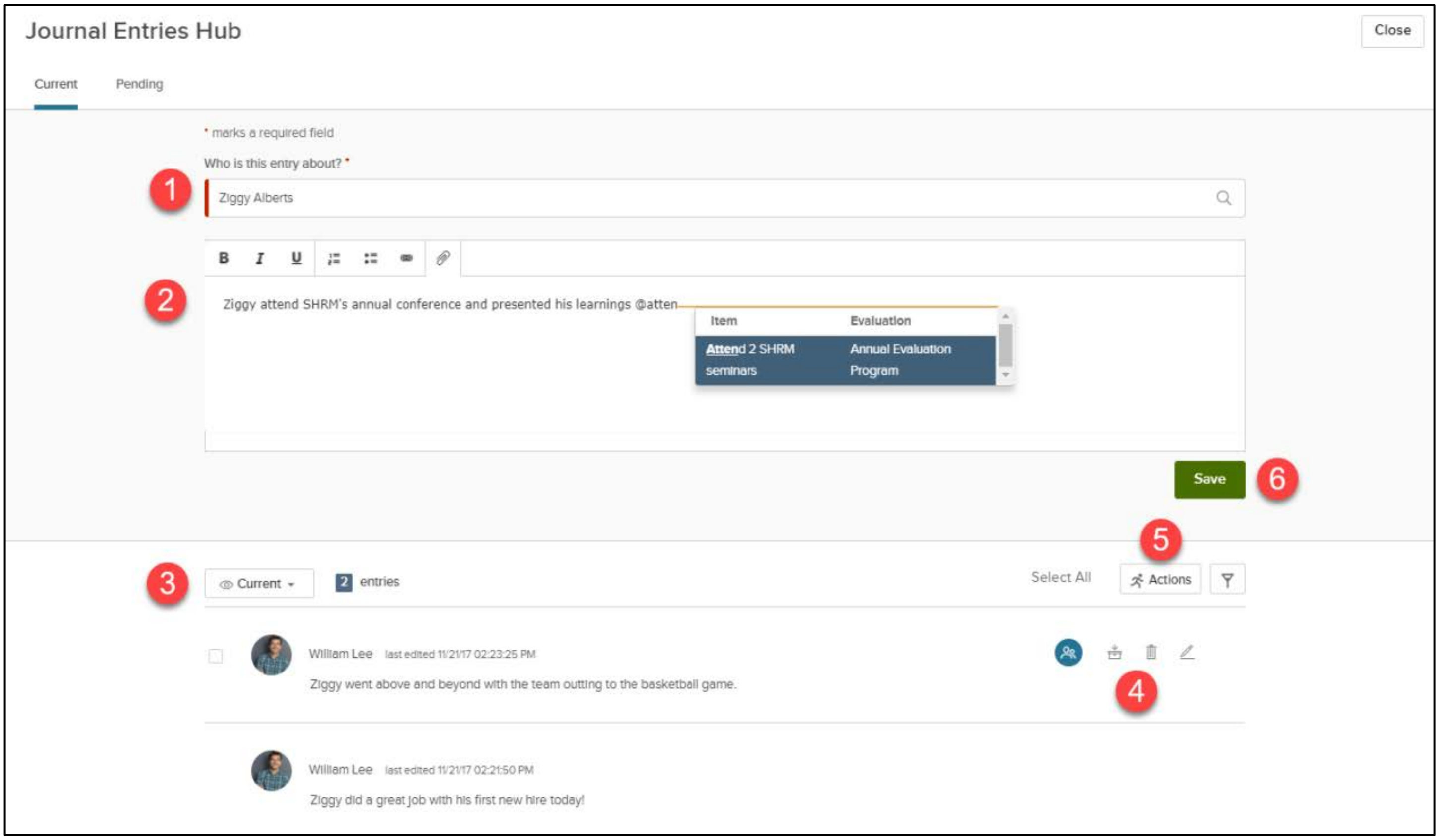
Adding Journal Entries via the Journal Hub

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.

Select the Journal Hub icon and a fly-out displays the **Journal Entries Hub**.



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
    - Once corrected, the Journal Entry is posted to the Current tab
3. **Who is this entry about?:** Search for yourself. Once 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
    - *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 fly-out and return to the previous page. Any unsaved Journal Entries are lost



1. Enter your **name**
2. Use the **Rich Text Editor** to enter the Journal Entry and style as necessary
   - You can add one (1) attachment to each Journal Entry
   - 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
   - To **share**, select the blue people icon
     - You can share Journal Entries created for yourself with your Manager and your Manager's Manager
   - **Archive** a Journal Entry by selecting the archive icon to de-clutter the system, making it easier to search through feedback entries
     - 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
     - To unarchive, select the unarchive icon
   - To **delete** any entries you created, select the trash icon
   - 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**

TIP: 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.

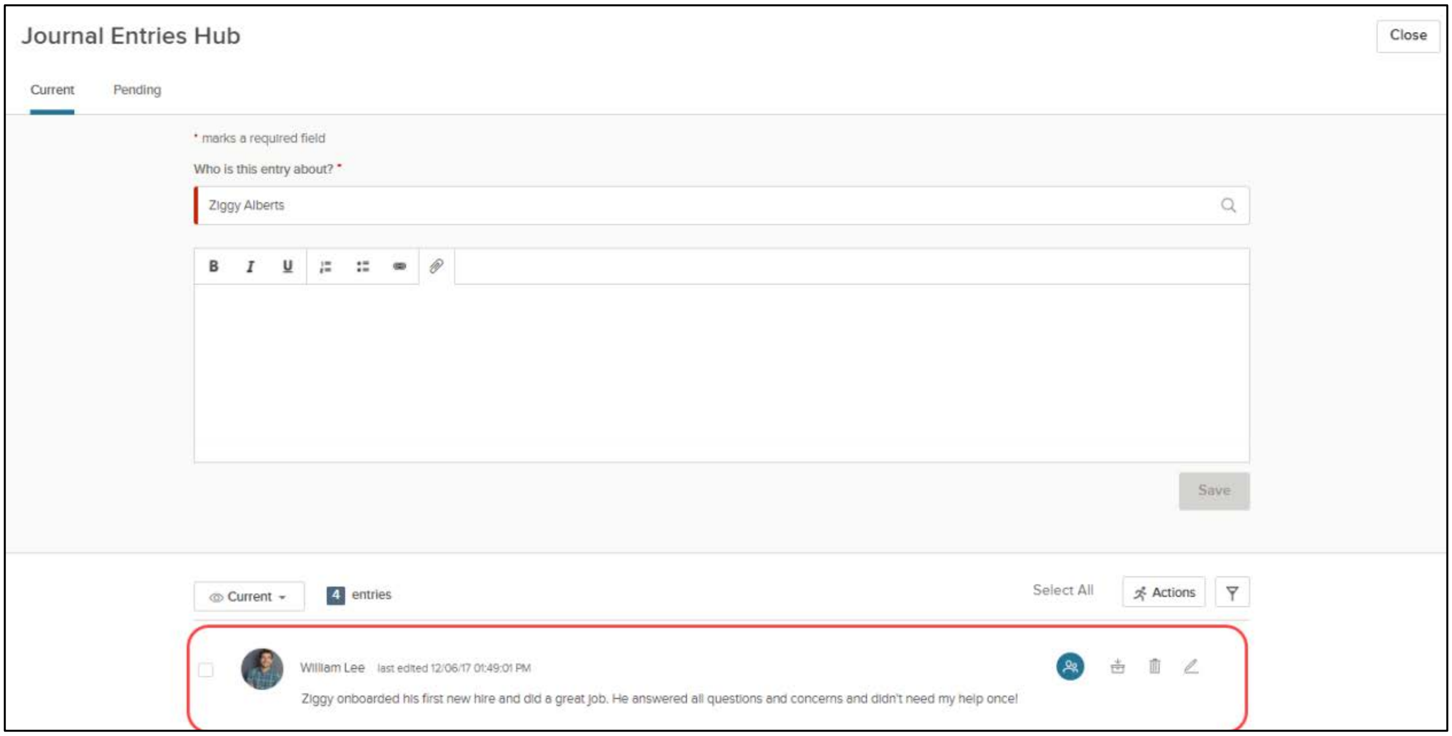
Employees must send the email from the email address that is used for their Perform account.

1. The email must be sent to **journals@neogov.net**
   - This can be found in Outlooks Global Address List as *NEOGOV Perform Journals*
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. You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.
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
   - "End Journal" is not visible in the Journal Entry once it is created

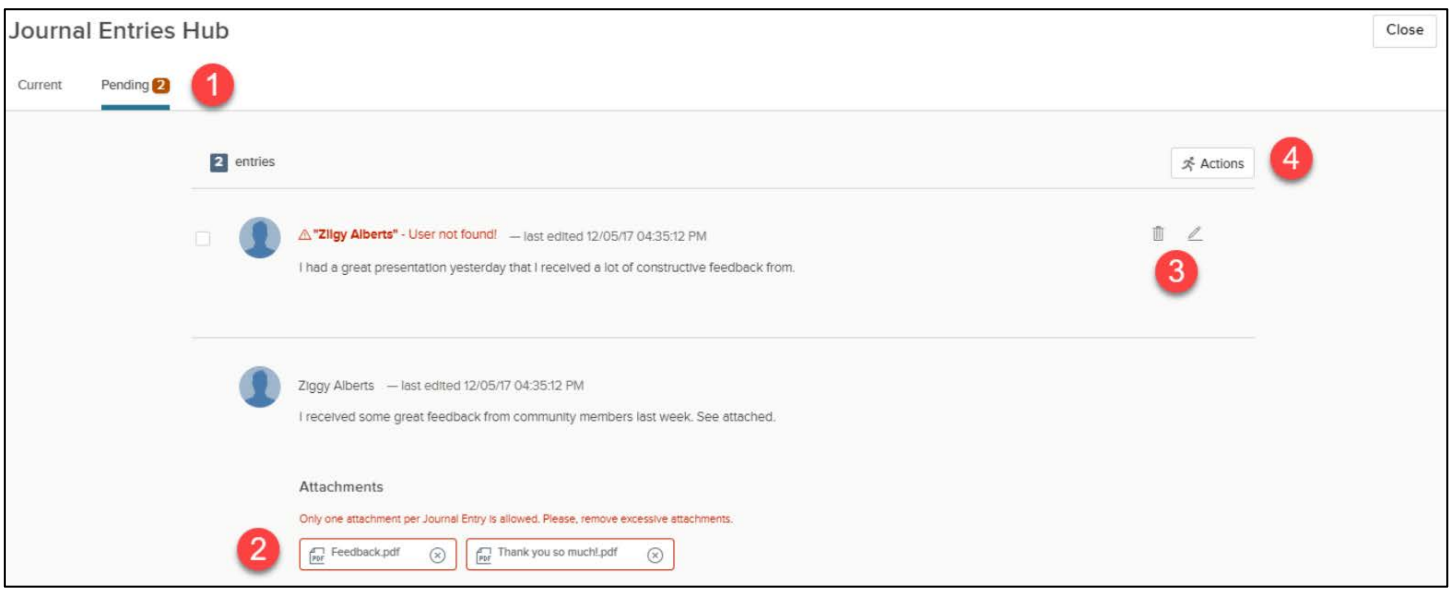
TIP: There can only be one attachment in the email. The attachment becomes a part of the Journal Entry once it is created in the system

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.



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.



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
    - 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.

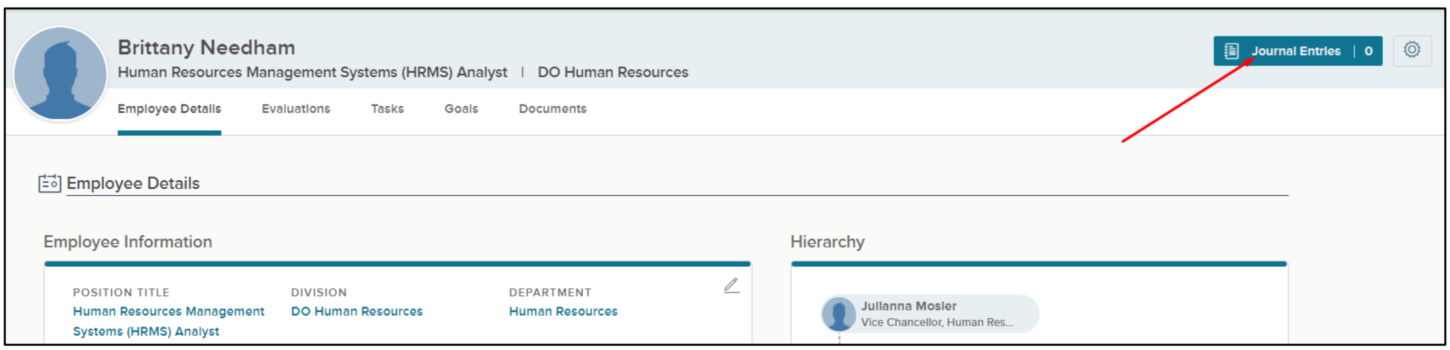
The 6 types of errors are:

- *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 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.



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

SECTION 7 – GOAL MANAGEMENT

Your manager can assign goals during your evaluation and throughout the year as needed. These goals will be visible on the **Goals Dashboard** which can be accessed from the Evaluation Dashboard.

The Goal Dashboard includes two sections for Managers:

- My Goal Tasks
- Current Goal Progress

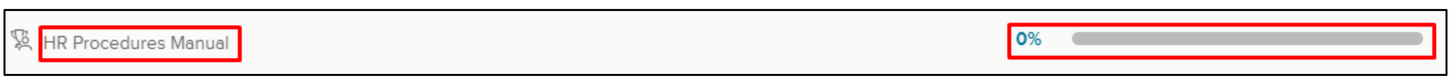
My Goal Tasks will show total goals assigned to you. These include any current or overdue goals that have not been completed. By clicking on the appropriate categories listed below, the goals can be filtered:

- Total Goals
- Goals On Time
- Goals Overdue
- Goals Completed
- Pending My Approvals (Manager Only)
- Pending Others Approval

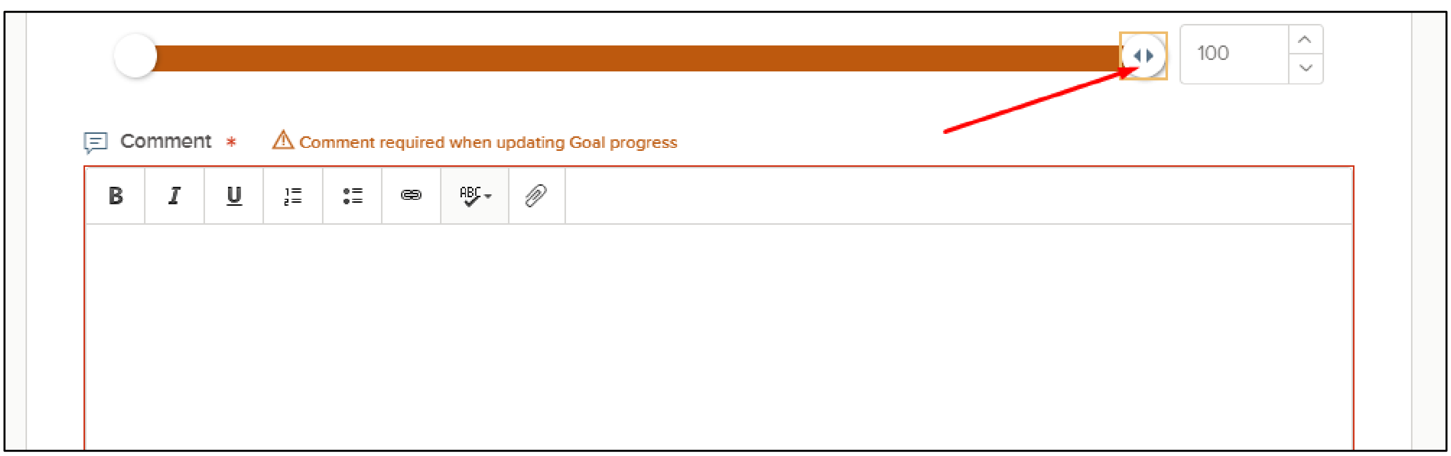
Through the Goals Dashboard, you can edit goals and milestones, add goal comments, and update goal progress from the Goal Dashboard. *All of these changes must be approved by your manger before complete.* Once the manger has approved, you will be notified through email.

NOTE: Goal updates pending manager approval can be found in My Goal Tasks under the category **Pending Others Approval**.

To **update goal** progress, select the name or the progress bar under My Goals Tasks.



A fly-out will appear. From there, you can update the progress of your goal by moving the progress bar or updating the percentage complete. Comments are required.



Once you've entered the required comment, click **Submit Updates.** A notification will be sent to the manager for approval.

When your manager approves your goal progress, you should receive an email notification and the changes should be reflected on your Goal Dashboard. If your manager denies an update to your goal progress, they'll need to provide correction and comments which you will then be notified about.

SECTION 8 – TIPS & TRICKS

Troubleshooting Browsers

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

- Chrome
- Internet Explorer 11 or higher
- Microsoft Edge

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered will not likely 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 simple fix solves most user issues. If this 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 Brittany Needham at brittany.needham@scccd.edu. Include as much information as possible.

TIP! To find out what browser you are using, go to whatsmybrowser.

Resetting Your Password

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. If your account has not been activated, please contact Brittany Needham at brittany.needham@scccd.edu.