



STATE CENTER  
COMMUNITY COLLEGE DISTRICT

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# **NEOGOV Perform**

## **Manager Training Guide**

*May 2018*

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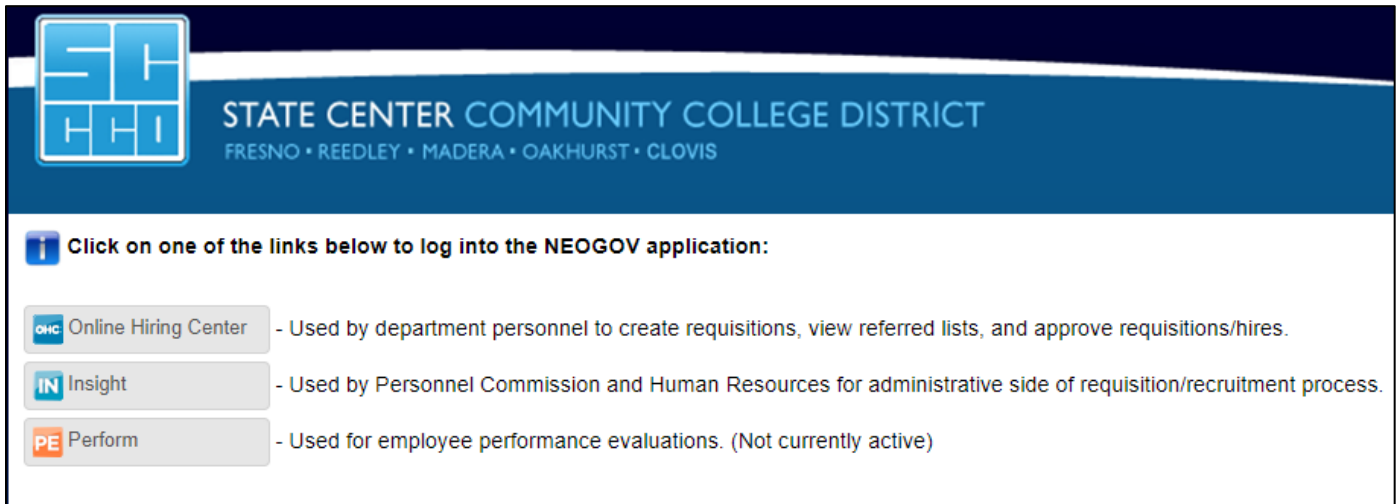
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## SECTION 1 - LOGIN

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



The screenshot shows the top navigation bar of the NEOGOV application. On the left is the district logo, a blue square with white letters 'SC' and 'CCCD'. To the right of the logo, the text reads 'STATE CENTER COMMUNITY COLLEGE DISTRICT' in white, with 'FRESNO • REEDLEY • MADERA • OAKHURST • CLOVIS' in smaller white text below it. Below the navigation bar is a white box with a blue header that says 'Click on one of the links below to log into the NEOGOV application:'. Underneath are three buttons: 'OHC Online Hiring Center' (with a blue icon), 'IN Insight' (with a blue icon), and 'PE Perform' (with an orange icon). Each button has a short description of its function.

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](#).

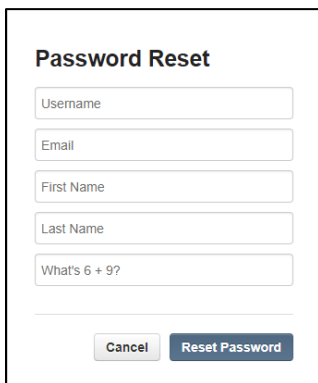


The screenshot shows the NEOGOV login page. At the top is the 'NEOGOV' logo. Below it are two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. At the bottom of the form, there are two links: 'Forgot username?' and 'Forgot your password?'.

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.

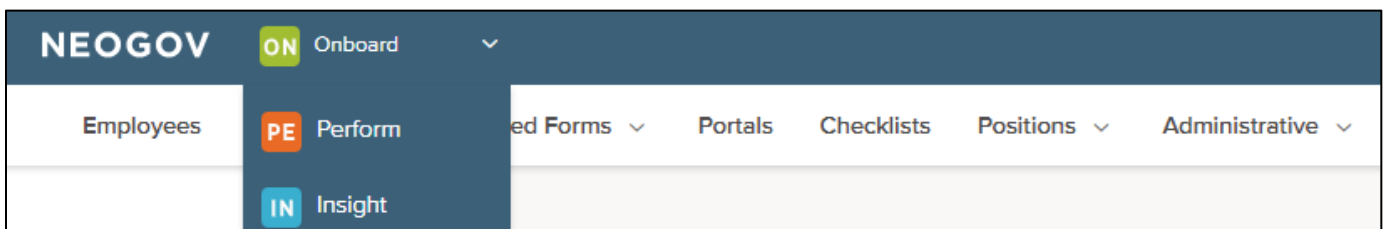
If you do not know or forget your password, click the “**Forgot your password?**” link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.



The screenshot shows the 'Password Reset' form. It has a title 'Password Reset' at the top. Below the title are five input fields: 'Username', 'Email', 'First Name', 'Last Name', and 'What's 6 + 9?'. At the bottom of the form are two buttons: 'Cancel' and 'Reset Password'.

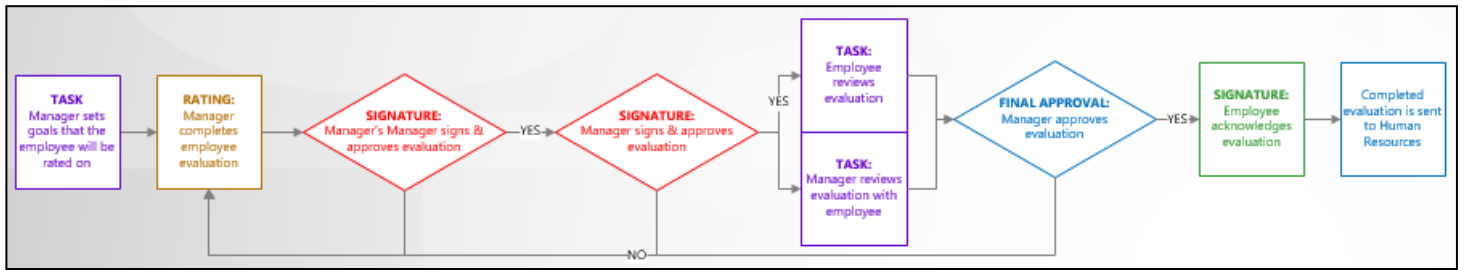
**NOTE:** Passwords must be a minimum of eight (8) characters and contain at least one number, one upper case letter, one lower case letter, and a special character.

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.



The screenshot shows the top navigation bar of the NEOGOV application. On the left is the 'NEOGOV' logo. To the right of the logo is a dropdown menu with 'ON Onboard' selected. Below the dropdown menu are several buttons: 'Employees', 'PE Perform', 'Insight', 'ed Forms', 'Portals', 'Checklists', 'Positions', and 'Administrative'. Each button has a small icon to its left.

## 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.*

*Currently, due dates for this task are the same as the day they are assigned. They do not reflect the evaluation due date.*

### RATING



**Rating**  
Manager

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

### AFTER RATINGS



**Approval & Signature**  
Manager's 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.*



**Approval & Signature**  
Manager

*Release evaluation to employee*



**Review Evaluation with Employee**  
Manager

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



**Review Evaluation Prior to Meeting with Manager**  
Employee

*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.*



**Approval**  
Manager

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



**Signature**  
Employee

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

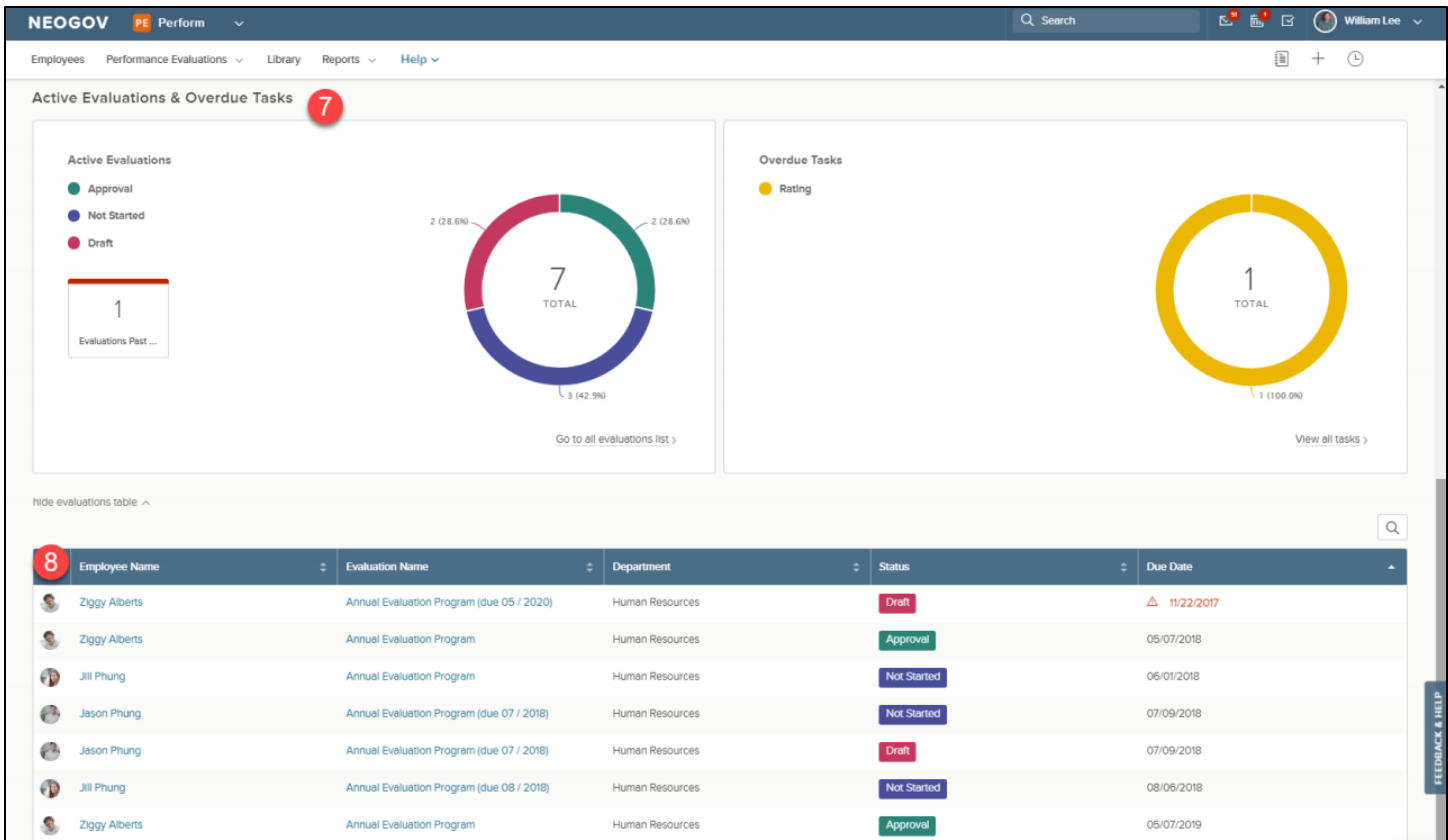
### Evaluation Dashboard

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.

The screenshot shows the NEOGOV Perform dashboard interface. At the top, there is a navigation menu with tabs for Employees, Performance Evaluations, Library, Reports, and Help (1). A search bar and user profile (William Lee) are on the right (5, 6). Below the menu is a 'My Tasks' section (2) with a summary bar showing counts for Total (4), Rating (2), Approve And Sign (0), Sign (0), Approve (0), Other (2), and Overdue (2). A table below lists tasks with columns for Task, For Employee, Related To, and Due Date. The 'My Evaluations' section (3) shows an 'Annual Evaluation Review' card. The 'My Direct Reports' section (4) displays cards for Ziggy Alberts, Jill Phung, and Jason Phung, each with counts for tasks and reports.

Task	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. **Dashboard Menu:** Based on HR Configuration you see the following tabs:
  - The **Employees List**
  - The **Performance Evaluation 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. **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.



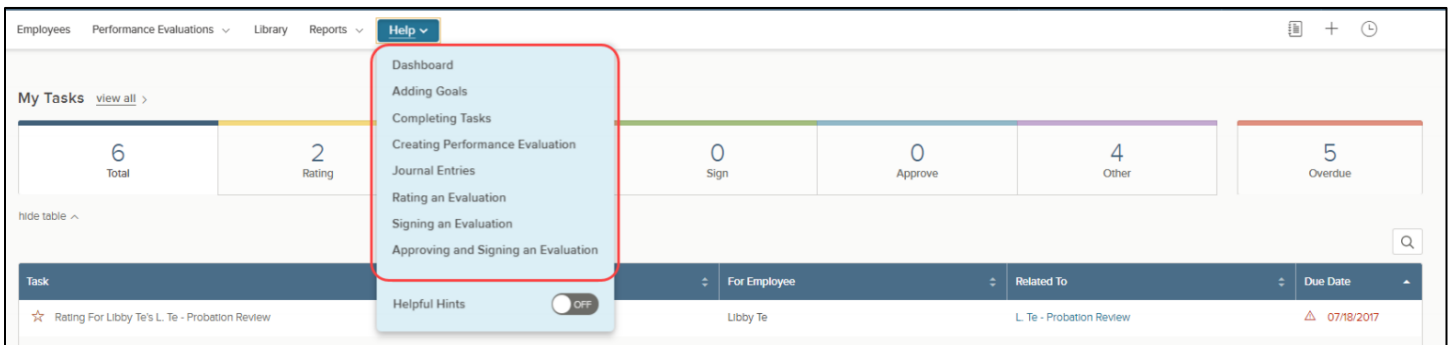
- Active Evaluations and Overdue Tasks:** Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and yourself (dependent on permissions configured by HR)
- Active Evaluation and Overdue Tasks List:** Updates to reflect the corresponding information selected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

## In-App Help

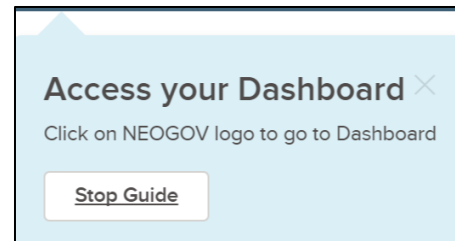
Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

### Using In-App Guidance

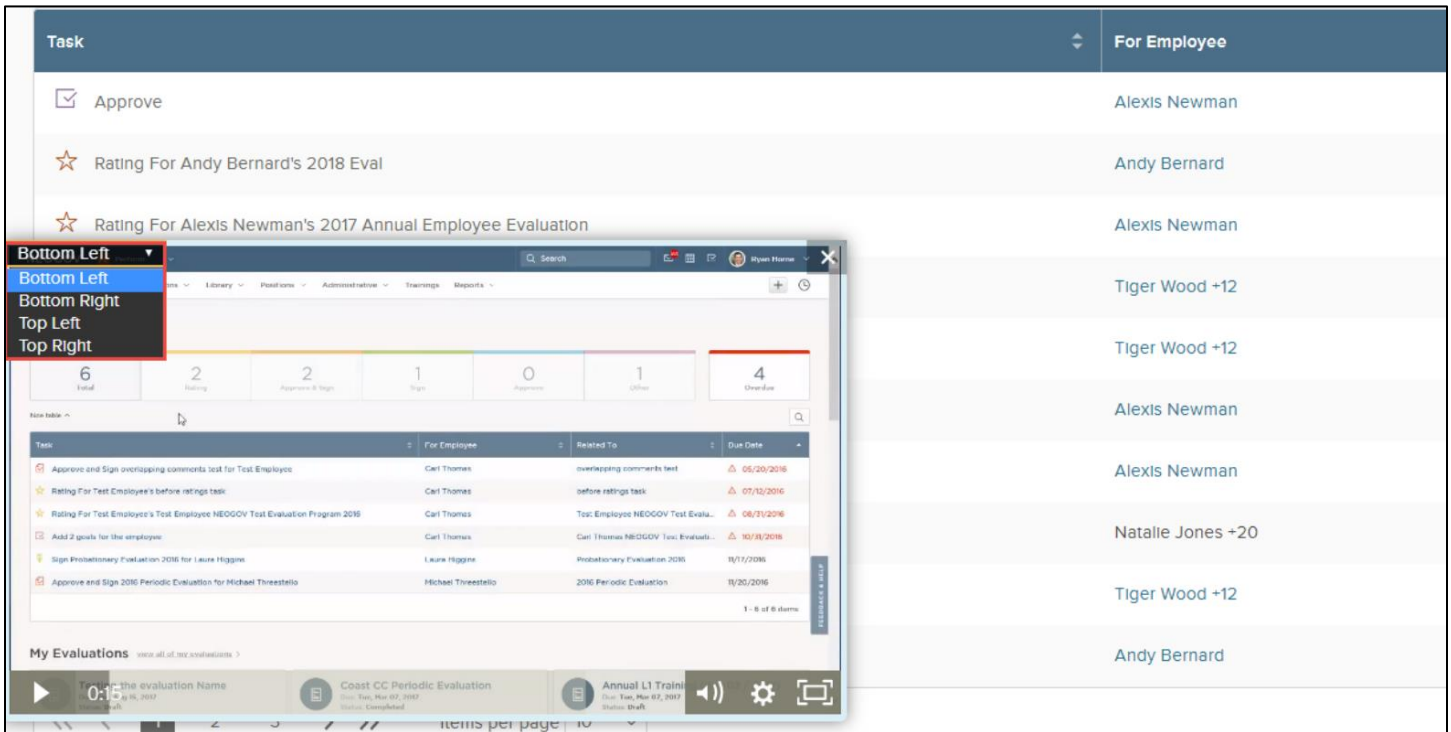
There is a **Help** menu accessible to all users. Hover over the Help icon to view a list of common actions.



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

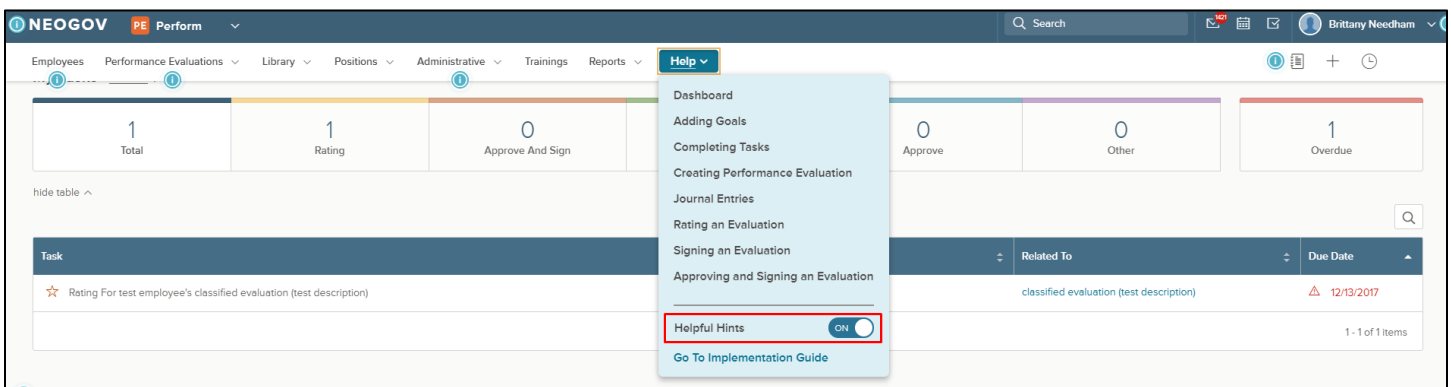


**NOTE:** If you leave the page playing a tutorial, the tutorial closes and is not available on the next page.

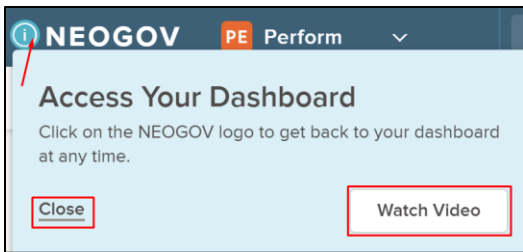
### Using Helpful Hints

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.







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**.

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 a Direct Report's 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.

**My Evaluations** [view all of my evaluations >](#)

**Biennial Confidential Evaluation (due 04 / 21...)**  
Due: **Sat, Apr 21, 2018**  
Status: **Not Started**

**Biennial Confidential Evaluation (due 04 / 21...)**  
Due: **Fri, Jul 28, 2017**  
Status: **Completed**

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.

## My Direct Reports

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

**My Direct Reports**

Jasmine Cho  
CS Department Manager  
0 Overdue Tasks  
0 Journal Entries

Jeff Gold  
Budget Analyst  
1 Overdue Task  
0 Journal Entries

Ryan Horne  
Lead Generation  
0 Overdue Tasks  
0 Journal Entries

Mike Shin  
Lead Generation  
0 Overdue Tasks  
0 Journal Entries

By clicking on the name of your direct report, you will be re-directed to their My Profile. Additionally, you can click into their overdue tasks, 0, or their journal entries, 0, and a fly-out will appear for the respective item.

## Active Evaluations and Overdue Tasks

The next section you will see is the **Active Evaluations and Overdue Tasks**:

**Active Evaluations & Overdue Tasks**

**Active Evaluations**

- Approval: 1 (12.5%)
- Rating: 1 (12.5%)
- Not Started: 2 (25.0%)
- Draft: 4 (50.0%)

8 TOTAL

Go to all evaluations list >

**Overdue Tasks**

- Sign: 1 (100.0%)

1 TOTAL

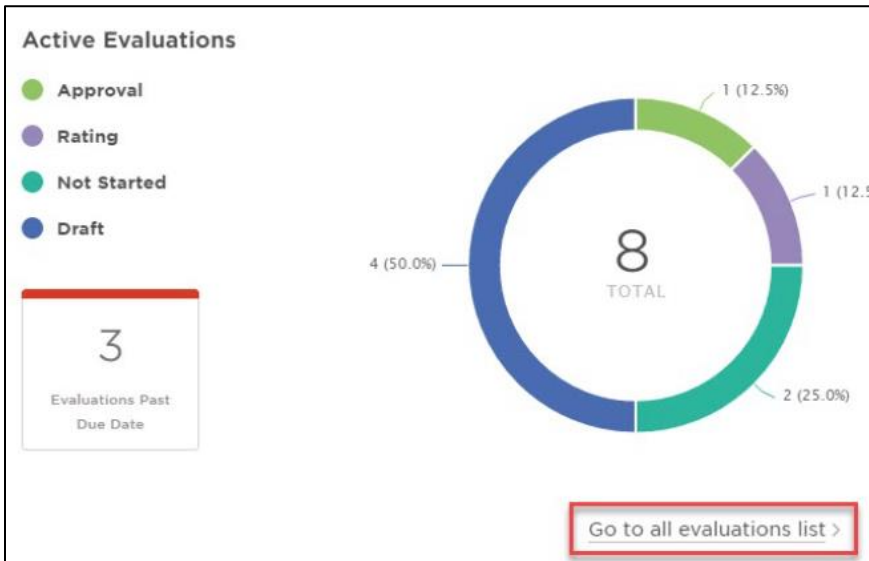
View all tasks >

hide evaluations table ^

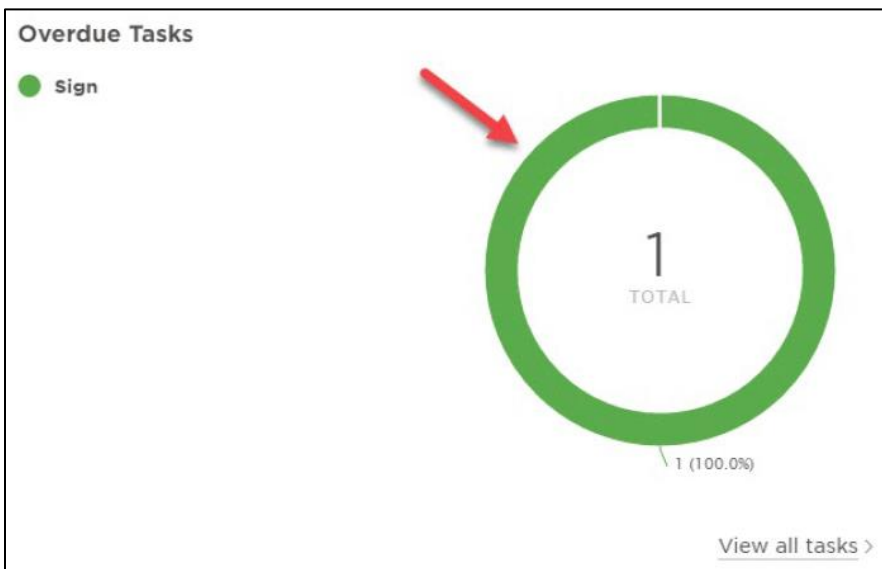
Employee Name	Evaluation Name	Department	Status	Due Date
Jasmine Cho	2016 Review	Customer Support	Draft	10/25/2016
Ryan Horne	2016 Performance Review	Sales	Not Started	10/25/2016
Mike Shin	2016 Performance Review	Sales	Approval	10/25/2016

The graph on the left displays all active evaluations, divided by the four different statuses: *Approval*, *Rating*, *Not Started*, and *Draft*. If you click on any respective part of the graph, the list below will filter to display the corresponding information. To revert to the total, select the center of the graph where it says **Total**.

Select the quick link **Go to all evaluations list** below the graph to be re-directed to the **Performance Evaluations List**:



To the right of the **Active Evaluations Graph** is the **Overdue Tasks Graph**:



Upon clicking on the **Overdue Tasks** graph, a fly-out will appear containing the list of overdue tasks:

**Overdue Sign Tasks**  
for All Evaluations

Done

Task Name	Task Assignee	Evaluation Name	Due Date
Sign Annual Performance Appraisal for Jeff Gold	Jeff Gold	Annual Performance Appra...	11/17/2016

To hide the evaluation table, select the **hide evaluation table** link:



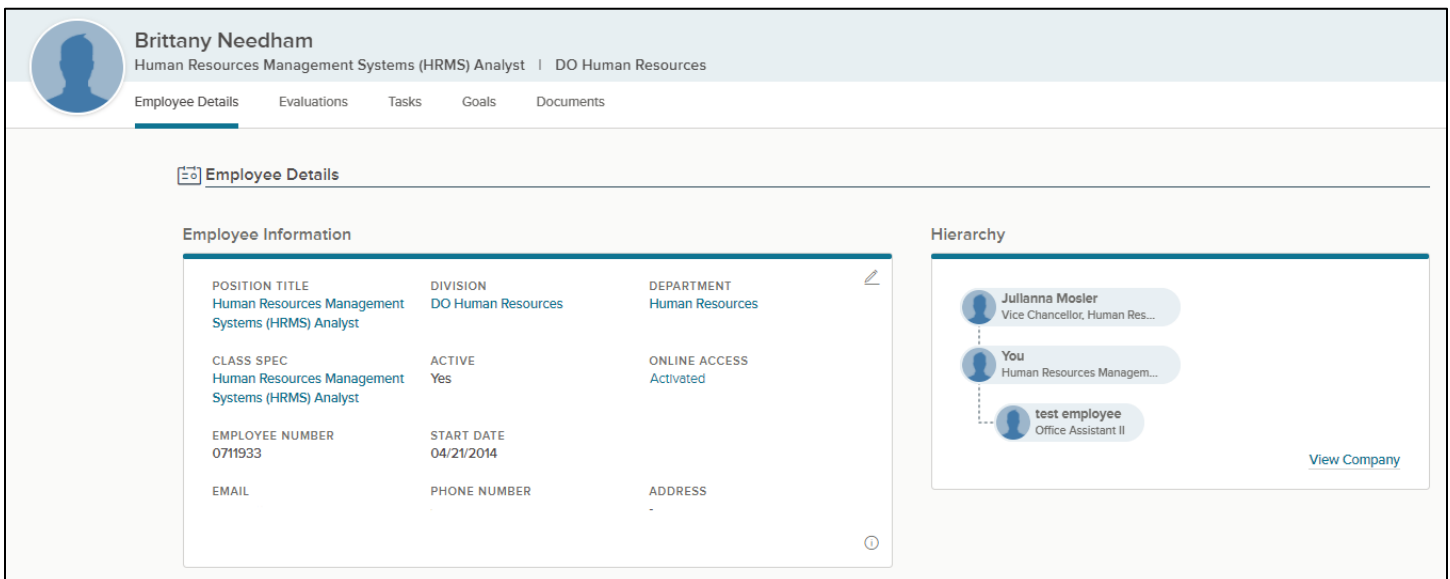
## Journal Hub

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 *Section 6*.

## My Profile

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



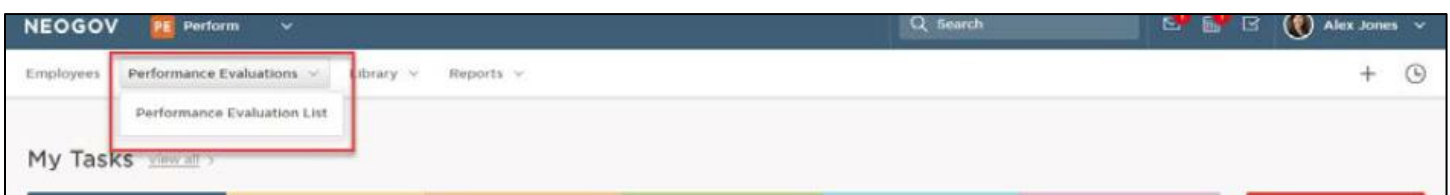
From **My Profile**, you can see any Performance Evaluations, Development Plans, and all tasks that are associated to you. Note, you can also add journal entries from this page. For information on adding journal entries, refer to *Section 6*.


You may also view your immediate **Hierarchy**. To view the entire agency org chart, select **View Company**.

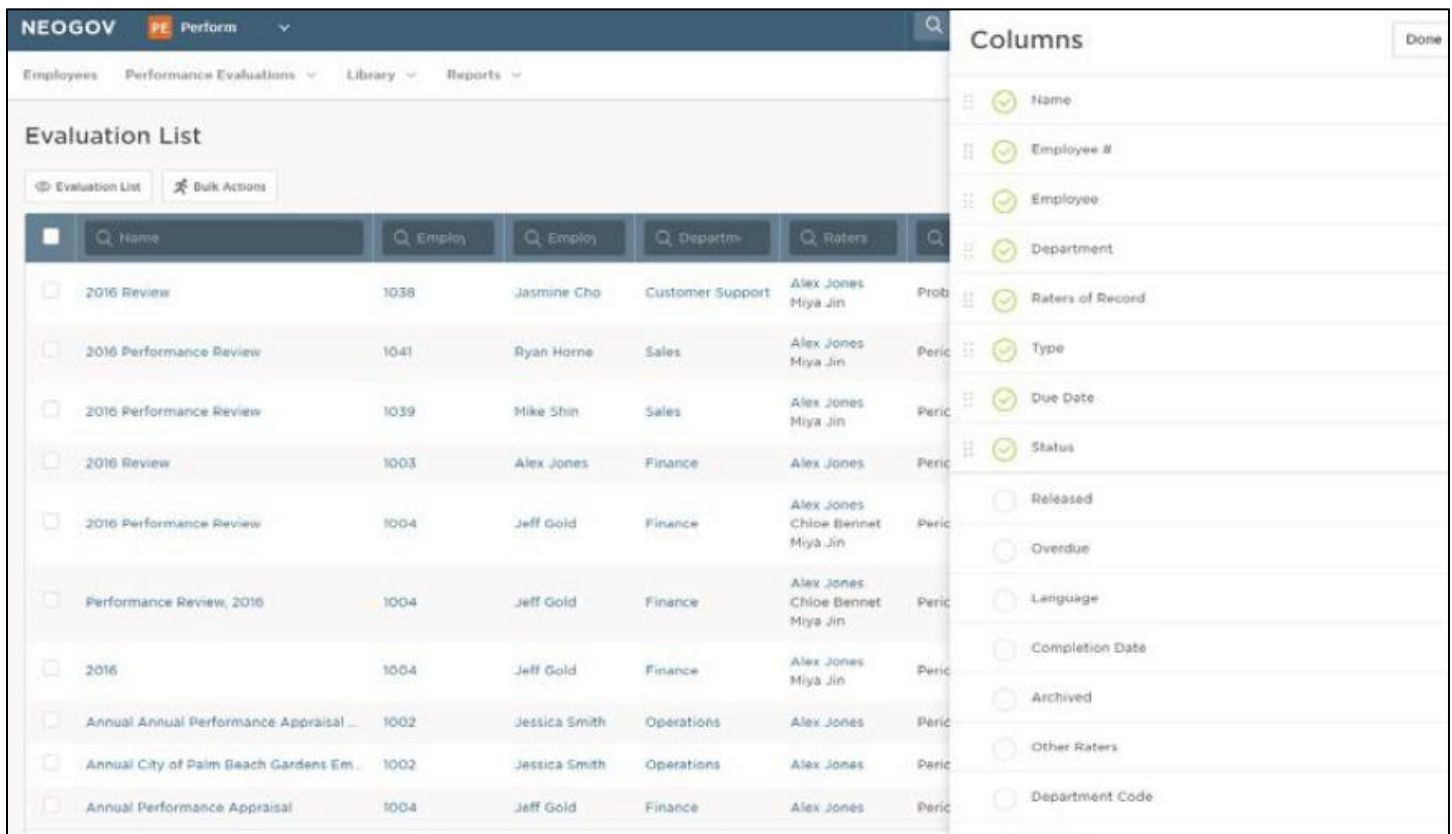
**TIP:** You cannot edit any of your Employee Information, such as position, email address, etc. If you need to update that information, please contact HR.

## Performance Evaluations List

To navigate to the **Performance Evaluations List**, select the **Performance Evaluations** drop down menu from your dashboard.



The Performance Evaluations List is a comprehensive list of your evaluations and your direct report's evaluations. You can add in additional fields to this list by selecting . A fly-out will appear with fields that can be added.



**NEOGOV** Perform

Employees Performance Evaluations Library Reports

### Evaluation List

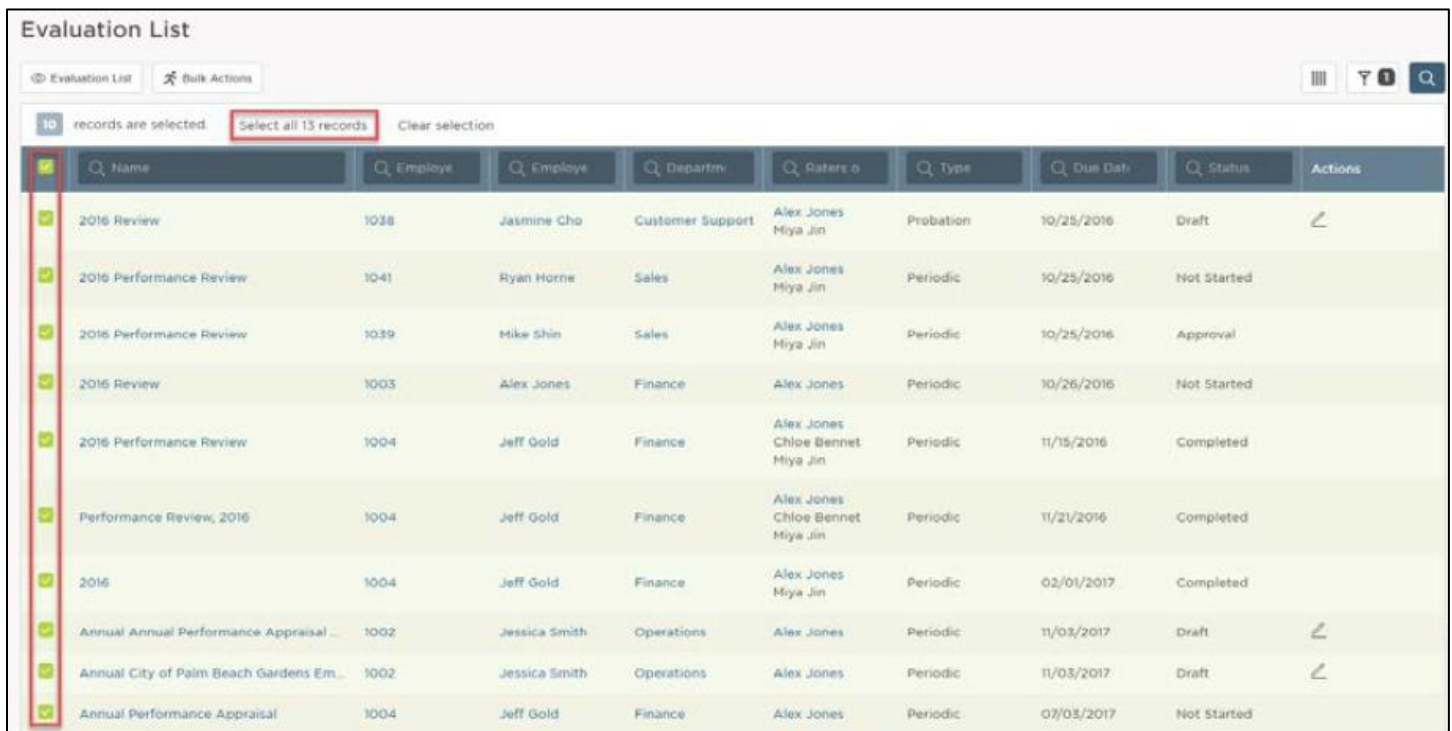
Evaluation List Bulk Actions

Name	Emplo	Emplo	Departm	Raters
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin
2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin
2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin
2016 Review	1003	Alex Jones	Finance	Alex Jones
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin
Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin
Annual Annual Performance Appraisal ...	1002	Jessica Smith	Operations	Alex Jones
Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones

**Columns** Done

- Name
- Employee #
- Employee
- Department
- Raters of Record
- Type
- Due Date
- Status
- Released
- Overdue
- Language
- Completion Date
- Archived
- Other Raters
- Department Code




Once all the desired fields are selected, you may bulk export or print the list. To do so, check the desired records or use the select all option:



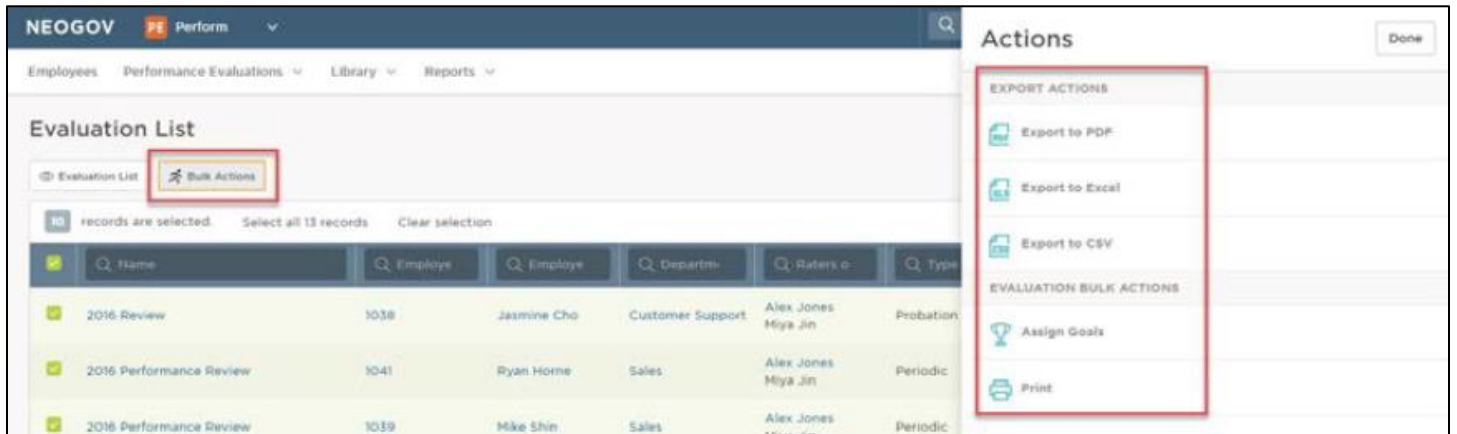
### Evaluation List

Evaluation List Bulk Actions

10 records are selected. **Select all 13 records** Clear selection

Name	Employee	Employee	Department	Raters	Type	Due Date	Status	Actions
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Probation	10/25/2016	Draft	
2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Not Started	
2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Approval	
2016 Review	1003	Alex Jones	Finance	Alex Jones	Periodic	10/26/2016	Not Started	
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/15/2016	Completed	
Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/21/2016	Completed	
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Periodic	02/01/2017	Completed	
Annual Annual Performance Appraisal ...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Periodic	07/03/2017	Not Started	

When all records are selected, click on the **Bulk Actions** button and a fly-out will appear. Select the **Print** option to send the selected evaluations to a zip folder:



From the zip folder, the evaluations can be downloaded, saved or sent to print.

**TIP!** To export a list view of the evaluations, with all columns shown on the screen, use the **Export to PDF**, **Export to Excel** or **Export to CSV** options. Note that this is not the same as exporting the actual evaluations for printing, as seen above.

## 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.

The screenshot displays the NEOGOV Perform interface. The top navigation bar includes 'NEOGOV', 'PE Perform', and a search icon. Below the navigation bar are menu items: 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main content area is titled 'My Tasks' and features a summary bar with five categories: Total (5), Rating (2), Approve And Sign (0), Sign (0), and Approve (0). Below the summary bar is a table with columns 'Task' and 'For Employee'. The table lists five tasks: 'Rating For Libby Te's L. Te - Probation Review' (Libby Te), 'Check in with Ziggy' (William Lee), 'Please discuss and create goals with the employee' (Jill Phung), 'Review, Add and/or Edit Goals' (Jason Phung), and 'Answer check-in question' (Jason Phung). The task 'Please discuss and create goals with the employee' is highlighted with a red circle '1'. A 'Task Detail' fly-out is open on the right, showing the task title, related program, due date, a status dropdown menu set to 'Completed' (with a red circle '2'), and a comments box containing the text: 'Jill and I met for an hour to discuss her goals for 2018. We came up with 4 goals that she will work towards completing.' A 'Save' button (with a red circle '3') is located in the top right corner of the fly-out.

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 – ADDING GOALS

### Setting Goals to Record Progress Achieved

The District currently uses a goal setting process before rating can begin. You will see the task to **Set Goals for PROGRESS ACHIEVED** on your task list. *These are goals the employee will be rated on during the evaluation process. There is a separate section to set future goals.*

Currently, due dates for this task are the same as the day they are assigned. They do not reflect the evaluation due date. To reference the evaluation due date, see the evaluation title or refer to evaluation due dates listed at the bottom of your dashboard.

When this task is assigned, it will appear on your dashboard under **My Tasks**. To navigate to your dashboard from any other page in Perform, select **NEOGOV** in the top left corner.

The screenshot shows the 'My Tasks' dashboard. At the top, there are five summary cards: 'Total' (1), 'Rating' (0), 'Approve And Sign' (0), 'Sign' (0), and 'Approve' (0). A sixth card, 'Other' (1), is highlighted with a red box. Below these cards is a table with columns for 'Task', 'For Employee', and 'Related To'. The first row shows a task named 'Set Goals' (checked), assigned to 'test employee', related to 'Annual Confidential Evaluation (due 07 / 01 / 2018)'. The 'Set Goals' task name is also highlighted with a red box.

Selected the task name and you will be re-directed to your Direct Report's **Progressed Achieved** section. This is a goal section on the employee's evaluation.

The screenshot shows the 'Progress Achieved' section of an evaluation. The header indicates 'Annual Classified Evaluation (due 01 / 01 / 2018)' for 'test employee' with a due date of 'Mon, Jan 1, 2018'. A 'Complete Task' button is visible. Below, there is a table with columns: 'Items', 'Description', 'Progress', and 'Actions'. The table contains two rows: 'test' with 100% progress and 'test goal' with 0% progress. A red box highlights the '+ Add Items' button, and another red box highlights the pencil icon in the 'Actions' column for the 'test goal' row.

1. Select **+ Add Items** to add goals to your evaluation or select **Weights** to edit each item weight. You can add goals:
  - **From Last Scheduled Evaluation:** Auto-populate goals that were entered in a Future Goals section on the last scheduled evaluation completed (if applicable)
  - **New Goal:** Create a brand-new goal
2. If there are existing goals on the evaluation you can **edit** the goal(s)
  - To do so, select the pencil icon and a fly-out of the goal detail page appears
  - 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 are completing an evaluation for a new employee or if goals were not assigned during the last evaluation, you can select **Complete Task** without adding any goals.

### Adding New Goals

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

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

### Goal Milestones

If you like, you can create **Milestones** for any goal. First, select Milestones from the Add Goal fly-out. Then click on the **+ Add New Milestone** button.

**Add Goal**

General **Milestones** Alignment ⓘ

Use weights ⓘ

+ Add New Milestone

Give the Milestone a name, enter a due date (optional), and select whether you'd like to use the reminder settings that were set on the original tab.

**Name \***

**Due Date** Use Overdue/Reminder Settings:

Yes  No

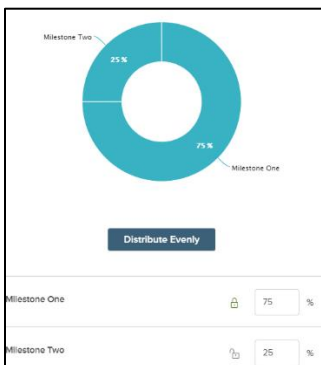
There is an option to use **weights** on Milestones. Enabling milestone weights prevents manual updates to goal progress. To set weights on established Milestones, click on the box **Use Weights** and then select **Edit Milestone Weights** to the right.

Milestones **Alignment**

Use weights ⓘ

⚙️ Edit Milestone Weights

A fly-out will appear to edit weights as needed. When you're done, hit save in the top right.



Once all the information is added for the Milestone, click save to return to the Add Goals fly-out.

Once all details have been added to the goal, select save or cancel.

Add as many additional goals as needed. Once saved, the Goal(s) are immediately added to the evaluation.

Once all goals are added, click on the **Complete Task** button.



As pictured in **Section 4**, a fly-out will appear of the Task Details. Add any comments if needed, then select **Save**.

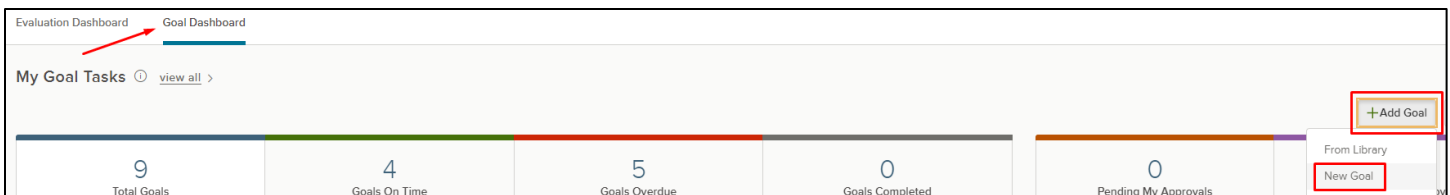
Once saved, a green success banner will appear at the top of the screen.

## Adding Goals Outside of the Evaluation

Goals can also be created without being tied to an actual evaluation. These goals can be included on future evaluations if necessary.

Managers can create goals for themselves and their direct reports and anyone below them in their hierarchy.

To create a goal, find the **+ Add Goal** button on the Goal Dashboard and then select **New Goal**. Further explanation of the Goal Dashboard can be found in **Section 10**.



Following the same instructions from above, once you choose **New Goal**, a fly-out appears to enter the Goal Details. Once all details have been added, select save or cancel.

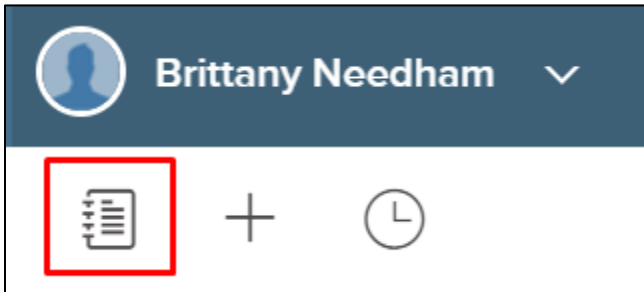
## SECTION 6 – JOURNAL ENTRIES

### 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 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
  - *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

**Journal Entries Hub** Close

Current Pending

\* marks a required field

Who is this entry about? \*

1 Ziggy Alberts

2 Ziggy attend SHRM's annual conference and presented his learnings @atten

Item	Evaluation
Attend 2 SHRM seminars	Annual Evaluation Program






Save 6

3 Current 2 entries Select All Actions 5

4

William Lee last edited 11/21/17 02:23:25 PM  
Ziggy went above and beyond with the team cutting to the basketball game.

William Lee last edited 11/21/17 02:21:50 PM  
Ziggy did a great job with his first new hire today!

1. Enter the **name** of the employee for whom to create a Journal Entry
  - 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
  - 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 
    - Share Journal Entries created for your Direct Reports with that direct report or your manager
    - 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**

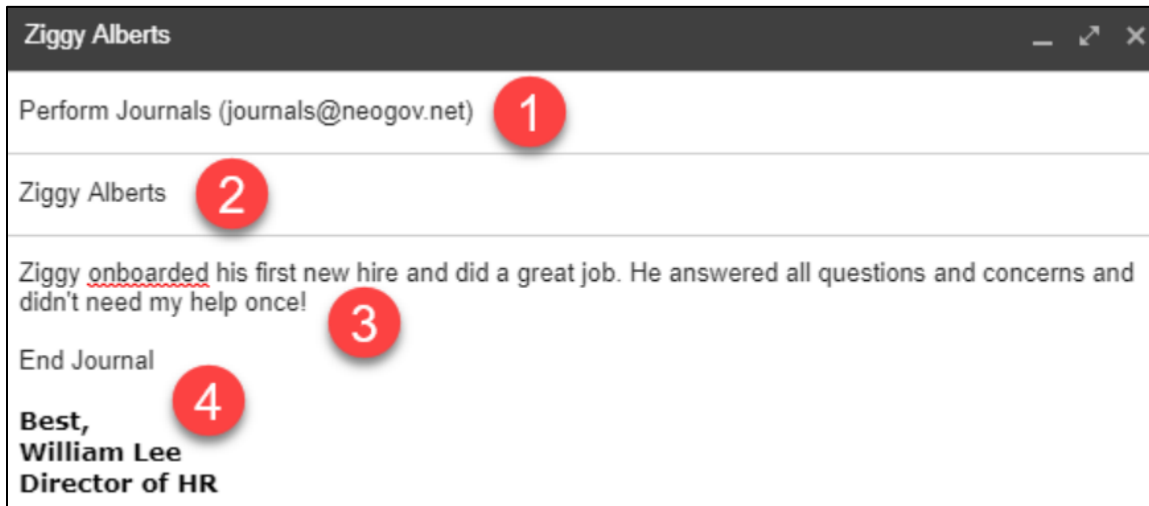
**TIP:** Archived Journal Entries can be unarchived from the Archived tab

## 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.



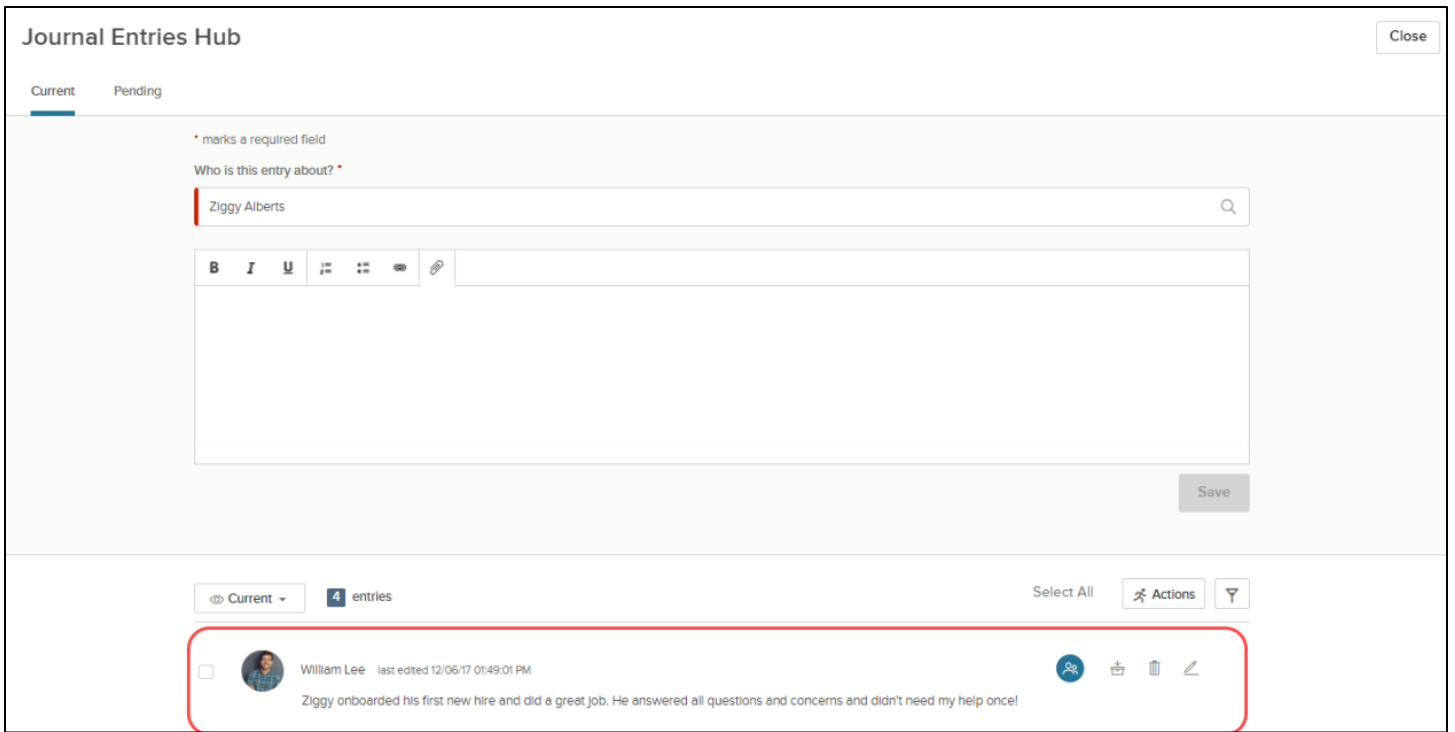
1. The email must be sent to **journals@neogov.net**
2. The email's subject/title should only include the name of the employee for whom the Journal Entry is being created. The spelling of the employee's name must match the spelling of it in Perform
3. Whatever is written in the body of the email automatically 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
  - "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

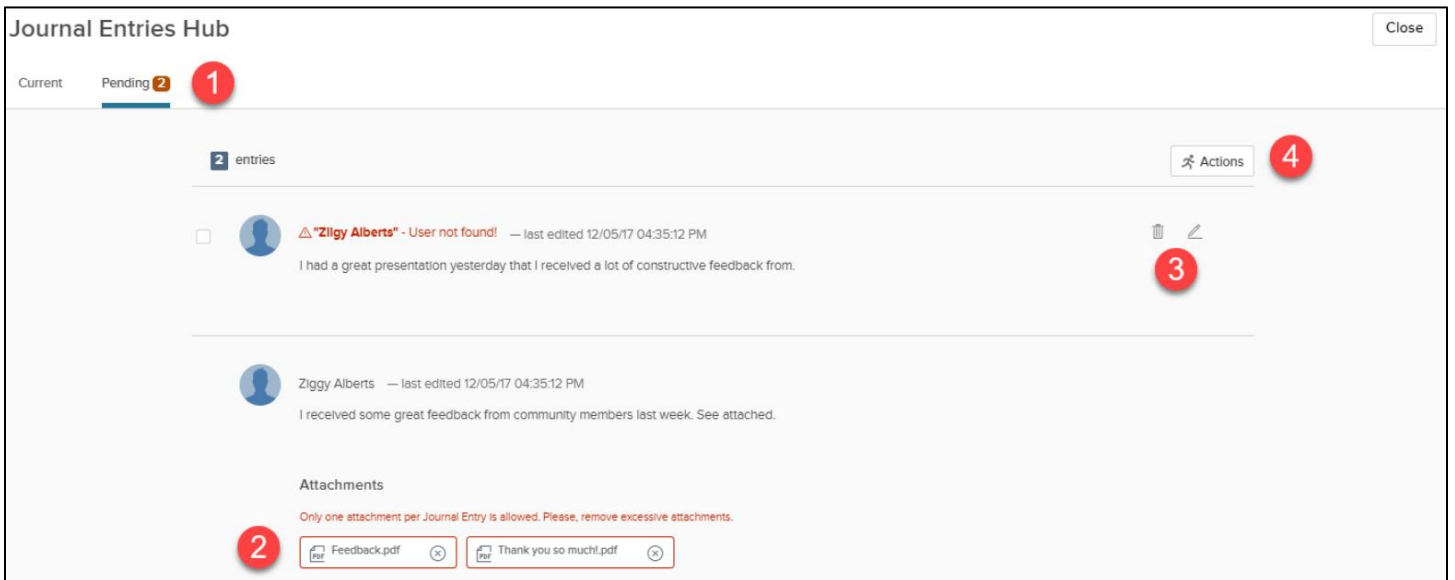
**NOTE:** You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

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.



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 Dashboard

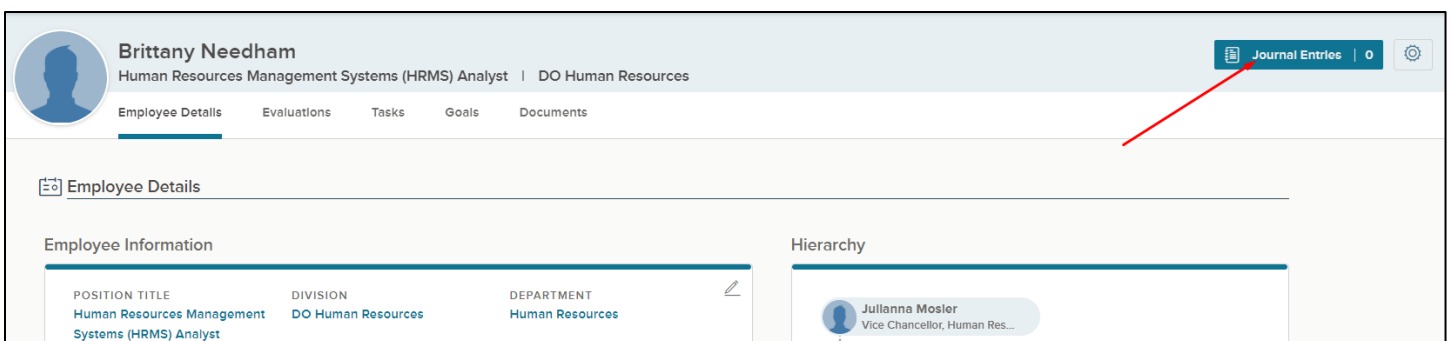
You can create Journal Entries for your direct reports via the My Direct Reports section on your dashboard.



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 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 – RATING AN EVALUATION

When you are required to rate your direct report's evaluation, you will receive notification via email and a rating task will be assigned to your dashboard.

**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.

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

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

To begin rating, click into the task name:

The screenshot shows a 'My Tasks' dashboard with a grid of task categories: Total (1), Rating (1), Approve And Sign (0), Sign (0), Approve (0), and Other (0). The 'Rating' category is highlighted with a red box. Below the grid, a table lists tasks. The first task, 'Rating For test employee's Annual Confidential Evaluation (due 07 / 01 / 2018)', is highlighted with a red box. The table also shows 'test employee' and 'Annual Confidential Evaluation (due 07 / 01 / 2018)'.




The link re-directs to the Rating Form.

### Rating Form - Competencies

The screenshot shows the 'Annual Classified Evaluation (Due 01 / 01 / 2018)' form. The 'Attendance' competency is highlighted with a red box. The form shows a 3-point rating scale for Core Competencies. The 'Attendance' competency has a rating of 2 and a 'no comment' button. The 'Compliance with Rules' competency has a rating of 0 and a 'no comment' button.

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

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

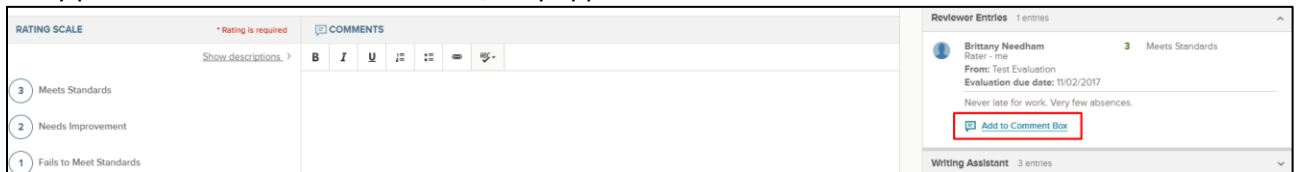
1. To view a description of each rating scale value, select the **Show descriptions** button and a fly-out appears with detailed information
2. Type any text into the **Comments** box, as needed. Edit text using the rich text editor provided
  - a. When a comment is required the box is highlighted in red
    - **NOTE:** Comments are required when *Exceeds Standards*, *Needs Improvement*, or *Fails to Meet Standards* is selected
  - 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** 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

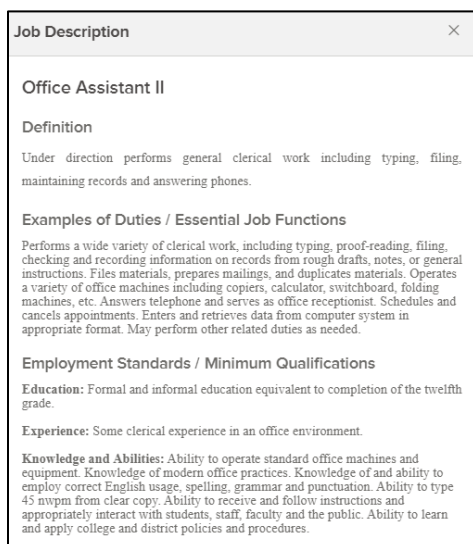


c. If any previous reviews have been made, they appear in the **Reviewer Entries** section



d. If **Check-Ins** are a part of your process, then the check-in comments appear

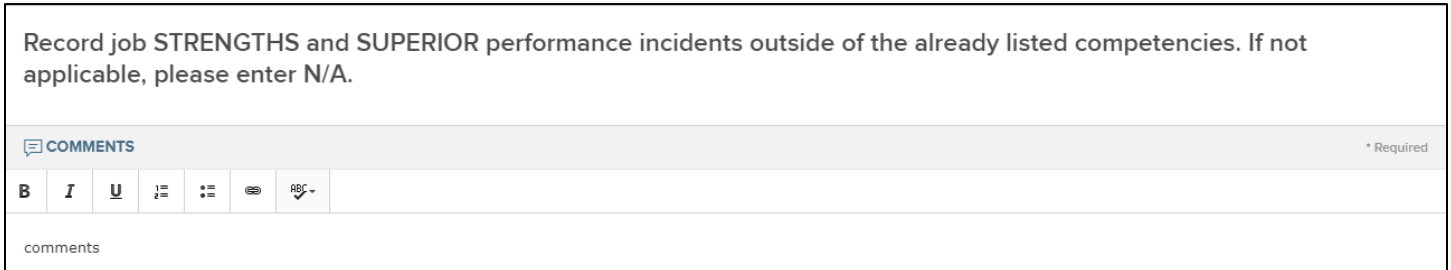
You can see detailed information about the position by selecting **Job Description**



To exit out of the Job Description, select the 'x' icon, which redirects you to the Feedback Entries view. Click *Next*, in the top right, to move to the next rating card.

## Rating Form - Narratives

**Narrative** sections include open ended questions with text boxes to answer. The narratives provided allow raters to include information outside of what's directly related to the listed competencies. Comments are required.



Record job STRENGTHS and SUPERIOR performance incidents outside of the already listed competencies. If not applicable, please enter N/A.

COMMENTS \* Required

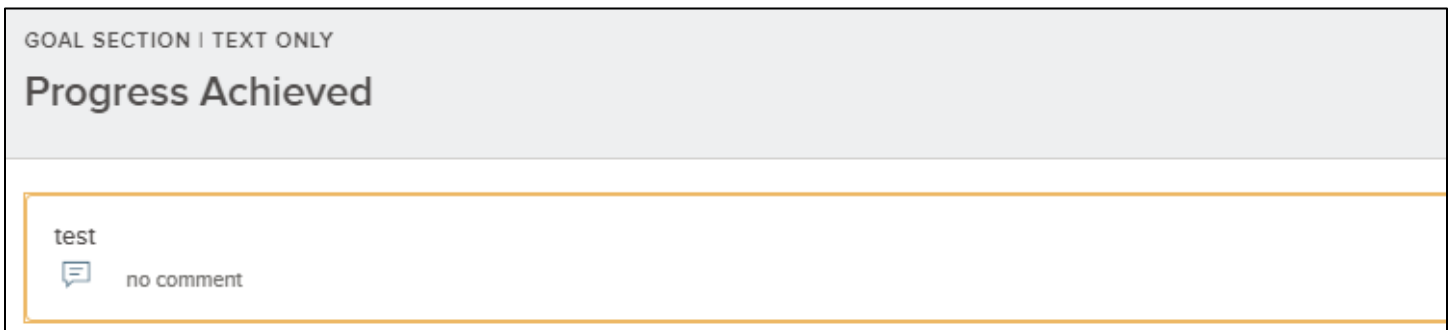
**B** *I* U

comments

There are two goal sections listed on the evaluation.

## Rating Form – Progress Achieved

The **Progress Achieved** section includes goals the manager added during the **Before Rating** task, as discussed in *Section 5*. *These are current or past goals to be discussed on the evaluation.*



GOAL SECTION | TEXT ONLY

### Progress Achieved

test

no comment

## Rating Form – Future Goals

The **Future Goals** section allows the manager to set upcoming goals for the employee. To create a new goal or select a current goal, select **+ Add Item**.



GOAL SECTION | FUTURE/LIST

### Future Goals

+ Add Item

From Library

Select From Employee Goals

New Goal

## Rating Form – Overall Rating

Once you have completed all required sections, go to the **Overall Rating** section. Enter any comments, as necessary and select an Overall Rating for the evaluation.

Total Score 3.78 out of 3.78		Overall Rating Exceeds Standards
<p><b>RATING SCALE</b>      * Rating is required</p> <p><a href="#">Show descriptions &gt;</a></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Exceeds Standards</li> <li><input type="radio"/> Meets Standards</li> <li><input type="radio"/> Needs Improvement</li> <li><input type="radio"/> Fails to Meet Standards</li> </ul>	<p><b>COMMENTS</b></p> <p><b>B</b>   <b>I</b>   <b>U</b>               </p>	

Rating Form – Print Current State

From the Summary section, select **Print Current State** for a printable version of the evaluation:

Total Score 3.78 out of 3.78	Overall Rating Exceeds Standards	<b>Submit Evaluation</b>

Scroll to view the entire evaluation, and select **Print**:

<p>test employee Student Aide</p> <p><b>Settings</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> General Information</li> <li><input checked="" type="checkbox"/> Rating Scales</li> <li><input checked="" type="checkbox"/> Notes &amp; Attachments</li> </ul>	<p>Print Preview</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>test employee</b> Annual Confidential Evaluation (due 07 / 01 / 2018)</p> <p style="text-align: right;">Due Date Sun, Jul 1, 2018 Direct Manager Brittany Needham</p> </div>	<p>Close <b>Print</b></p>
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Rating Form – Submit Evaluation

Once all sections are completed, select **Submit Evaluation** in the top-right corner:

3.78	Overall Rating Exceeds Standards	<b>Submit Evaluation</b>

A pop-up message will appear prompting you to continue.

**You're almost done!**

By clicking certify and submit, you confirm that your rating is complete and accurate. Once your rating is submitted, you will no longer be able to make changes without administrator assistance.


*Brittany Needham*

Do you wish to continue?

You receive a confirmation message. *Once the evaluation is submitted changes can no longer be made UNLESS the evaluation is denied during the approval process. If denied, it will revert back to the rating stage.*

If further changes are needed, click **Cancel**. Otherwise, select **Continue**.

**Success!**



Your evaluation for **test employee** has been submitted.

The evaluation has been successfully submitted and routed for approval & signature.

## SECTION 8 – APPROVING & SIGNING AN EVALUATION

When you need to approve and/or sign, you will receive an email notification and see the task on your dashboard.

**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 **NEGOV** 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.

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

The screenshot shows the 'My Tasks' dashboard. At the top, there are six summary cards: Total (1), Rating (0), Approve And Sign (1), Sign (0), Approve (0), and Other (0). The 'Approve And Sign' card is highlighted with a red box. Below the cards is a table with columns for Task, For Employee, and Related To. A single task is listed: 'Approve and Sign Annual Confidential Evaluation (due 07 / 01 / 2018) for test employee', with 'test employee' in the 'For Employee' column and 'Annual Confidential Evaluation (due 07 / 01 / 2018)' in the 'Related To' column. The task name is also highlighted with a red box.

The approval page displays.

### Navigating the Approval Page

The screenshot shows the 'After Ratings' page. At the top, there is a header with a profile picture, evaluation name 'Annual Classified Evaluation (due 12 / 01 / 2017)', and due date 'Fri. Dec. 01, 2017'. There are two buttons: 'approve & sign' and 'deny', with a red box around the 'approve & sign' button. Below this is a 'Rating Summary' section with a red box around the title. It shows a total score of 3.48 out of 3.78, an overall rating of 'Exceeds Standards', and a weight of 100%. There are two buttons: 'Rating Details' and 'Rating Chart', with a red box around the 'Rating Chart' button. Below this is a 'SECTIONS' section with a red box around the title, showing 'Core Competencies' and 'Classified Competencies'. There is a 'Collapse all sections' link and a 'Collapse Section' link.

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
  - Scroll through each section to review the ratings and any comments provided
3. Toggle between the **Rating Details** or the **Rating Chart**
  - The Rating Chart displays a bar graph of all raters
4. Once you have reviewed the evaluation, select **approve & sign**, or **deny**
  - If deny is chosen you must enter in a comment

**NOTE:** Any comments included with the approval will appear on the evaluation along with the electronic signature. These comments can be seen by anyone who has access to view the evaluation including the employee. If the evaluation is denied, the comments remain on the evaluation until approved. As a reminder, the employee will not have access to that information until the manager signs the evaluation.

**Tip!** If you need to make any changes to the evaluation you've submitted for your direct report, deny the evaluation to re-open the rating task. Once the evaluation is re-submitted with the added edits, all approvals and signatures will be re-triggered.

If you select **approve & sign**, a fly-out will appear. Enter any desired comments, sign, and submit.

Once submitted, a green success banner will appear and you will be re-directed to the evaluation page.

After the Manager's Manager Approves and Signs, the Manager will need to **Approve & Sign** the evaluation before it is released to the employee.



### Acknowledging Review Tasks

Once the manager(s) approve & sign the evaluation, the evaluation becomes visible to the employee and two manual tasks are assigned. One for the employee to **Review Evaluation Prior to Meeting with Manager** and another for the Manager to **Review Evaluation with Employee**.

Both of these tasks must be acknowledged before the employee can sign their evaluation. Refer to *Section 4* for help completing a task.

<b>Review Evaluation Prior to Meeting with Manager</b>
<b>Review Evaluation with Employee</b>

Once both tasks are completed, the employee can follow the process above to sign their evaluation. The employee will only have the option to sign the evaluation – they cannot deny it. However, employees do have the opportunity to add comments at this time.

 <b>test employee</b> Student Aide	<small>EVALUATION NAME</small> Annual Confidential Evaluation (due 07 / 01 / 2018)	<small>DUE DATE</small> Sun. Jul. 01, 2018	
--	--	---	---



## SECTION 9 – CREATING & ACTIVATING EVALUATIONS

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.

If needed, 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 **Profile**. To create an evaluation, navigate to their **Evaluation** section.

The screenshot shows the NEOGOV interface for an employee profile. The employee is Ziggy Alberts, a Human Resources Assistant. The page is divided into sections: Employee Information, Hierarchy, and Evaluations. The Employee Information section contains a table with fields like Position Title, Department, Division, Class Spec, Address, Email, Start Date, Separation Date, Employee Number, Phone Number, Active status, and Online Access. The Hierarchy section shows a tree structure with Libby Te as HR Administrator, You as HR Director, and Ziggy Alberts as Human Resources Assistant. The Evaluations section shows two 'Annual Evaluation Program' cards with due dates of May 07, 2019 and May 07, 2018. A red circle and arrow highlight the '+ Add Evaluation' button in the top right of the Evaluations section.

### Creating an Evaluation

You will be re-directed to the **Evaluation Creator** page.

The screenshot shows the Evaluation Creator form. The 'Name' field is filled with 'Biennial Confidential Evaluation (due 11 / 04 / 2018)'. The 'Evaluation Options' section has 'Next Scheduled' selected with a radio button and 'Custom' selected with a radio button. The 'Employee' field is filled with 'Paola Lopez'. The 'Evaluation Type' section has 'Periodic' selected with a radio button and 'Probation' selected with a radio button. The 'Due Date' field is filled with '11/02/2017'. The 'Program' field is a dropdown menu with 'Select one' selected.

Enter a **Name** for the Evaluation.

Select if you would like to use the **Next Scheduled** evaluation, or create a **Custom** evaluation

If you choose **Next Scheduled**, the next scheduled evaluation will automatically default.

If you choose **Custom**, you can choose which evaluation to create for the employee as well as a specific *due date* and *evaluation program*.

**IMPORTANT:** When using the Custom option to create an evaluation, the future goals assigned will not automatically populate in the next year evaluation. For *future goals* to populate correctly on future evaluations, the *next scheduled* option must be used.

To see a preview of the evaluation, select the **Generate Preview** button. The preview will display the evaluation Content and Process sections.

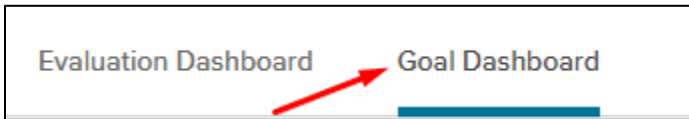
Scroll to the bottom of the preview and select **Create**, or **Cancel**.

6	<b>Approval</b> Paola Lopez	Due Mon, Jan 1, 2018	Status Pending 09/06/2017	Step is required Yes
●	Evaluation Due Date Mon, Jan 1, 2018			
<input type="button" value="Cancel"/> <input type="button" value="Create"/>				

Once created, you will be re-directed to the Evaluation Detail Page.

## SECTION 10 – GOAL MANAGEMENT

As discussed in **Section 5**, Managers can add goals during the employee’s evaluation process. Once the evaluation has been submitted, these goals are visible on the **Goals Dashboard** which can be accessed from the Evaluation Dashboard.

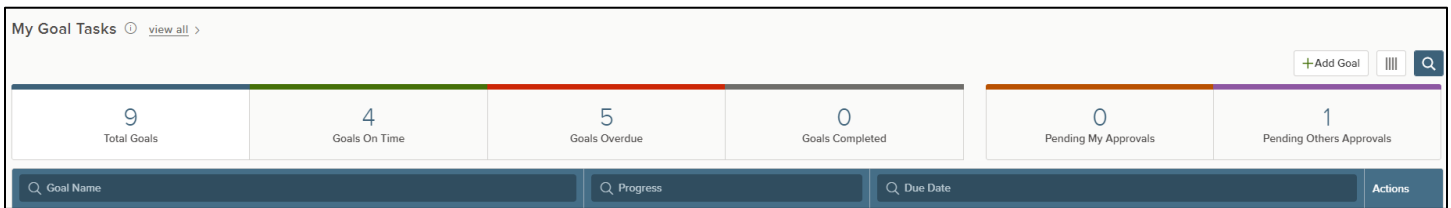


The Goal Dashboard includes two sections for Managers:

- 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:

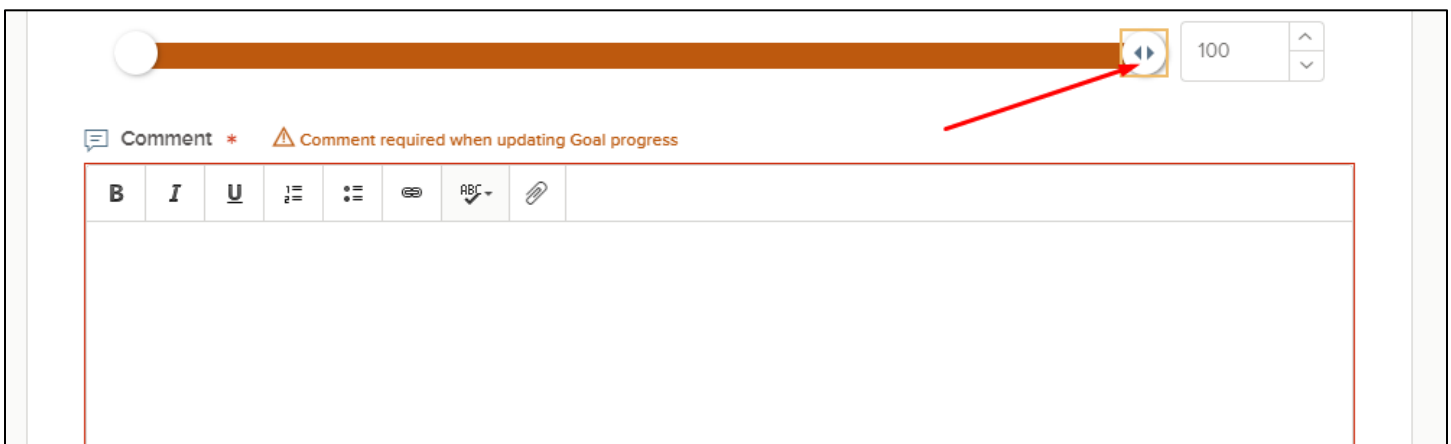
- Total Goals
- Goals On Time
- Goals Overdue
- Goals Completed
- Pending My Approvals (Manager Only)
- Pending Others Approval



To update any goal from your task section, select the name or the progress bar.

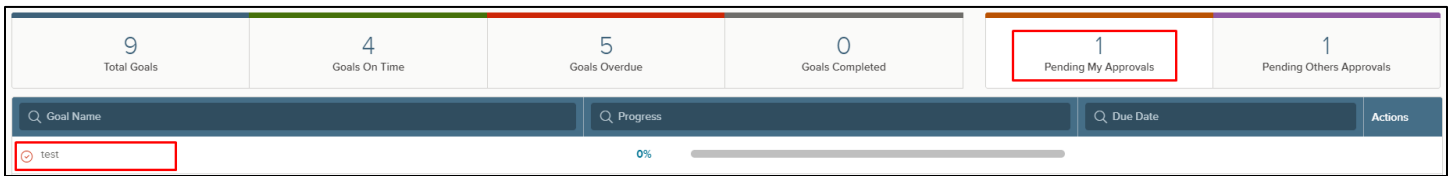


A fly-out will appear. From there, you can update the progress of your goal by moving the progress bar or updating the percentage complete. Comments are required.



To complete the update to your goal progress, click **Submit Updates**. A notification will be sent to your Manager for approval. Goal updates pending manager approval can be found in My Goal Tasks under the category **Pending Other Approval**.

My Goal Tasks will also include any goal update approvals from direct reports. To approve goal updates, Managers should find the goal task with the red check mark next to it. To look at just goal approval tasks, select the **Pending My Approvals** category.

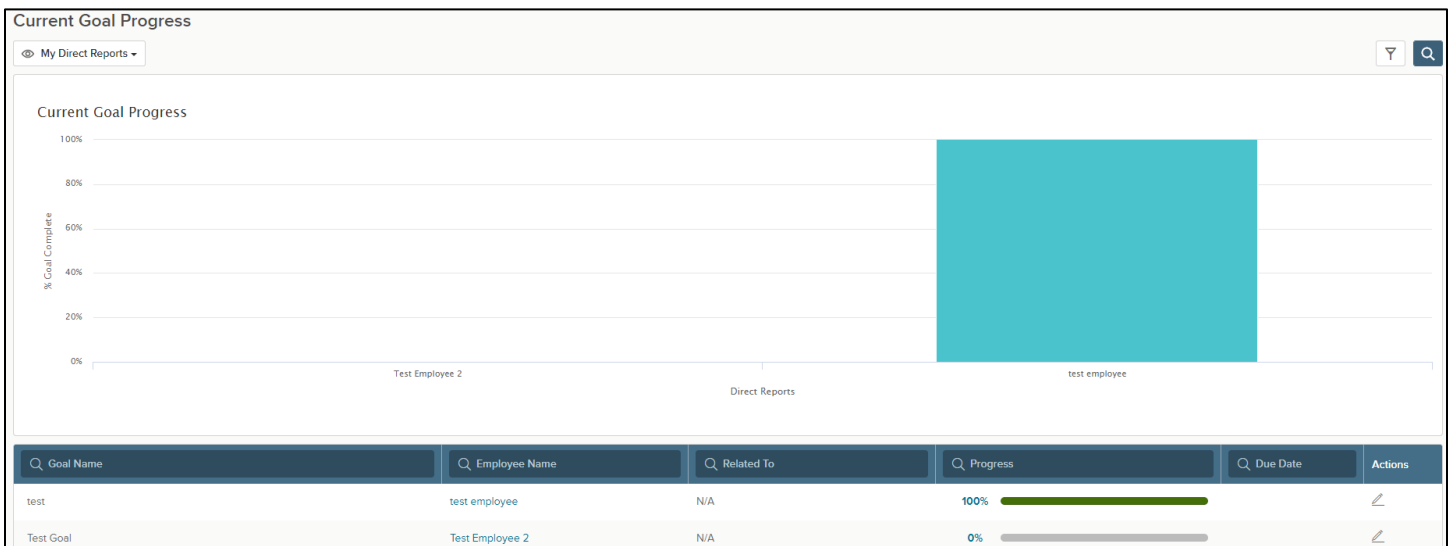


When you select the goal name or progress, a fly-out will appear. If the updates the employee submitted are accurate, select **Approve** and **Submit Updates** in the top right. If not accurate, select **Deny** – Managers can then make any changes and comments. The employee will be notified of any changes.



Direct Reports have the ability to create/edit/delete milestones, add goal comments, and update goal progress from the Goal Dashboard. The Manager will receive email notification with each change. All of these changes must be approved by the Manager before complete.

Managers can use the **Current Goal Progress** section to track the goal progress of their direct reports. If you click on the graph, the grid below will filter appropriately.



Additional filter options are available through the filter button on the right or simply type into the available search boxes.



**Filters** Done

**Add a Filter...**

Fields are required. Clear All ×

Employee Name ▼

Is... ▼ ×

Enter value

Q Goal Name

Q Progress Q Due Date

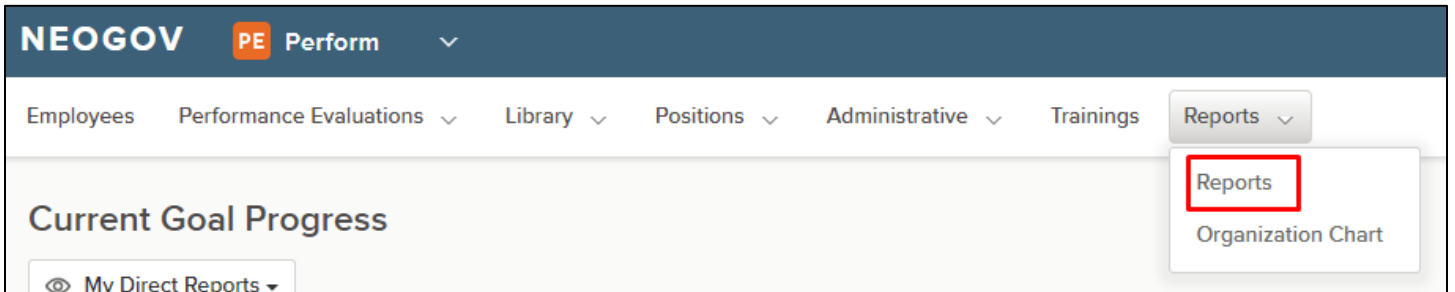
Q Employee Name Q Related To

## SECTION 11 – REPORTS

Managers have the ability to run reports on employees within their managerial hierarchy.

### Navigating to Reports

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







You are now in the Reports page. A list of all pre-defined reports will appear:


Report	Description
Evaluation Status By Division Report	Aggregated status of all active evaluations summarized by Division
Evaluation Status Detail	Detailed status of all active evaluations
Performance Rating	Overall performance ratings for selected evaluations.
Goal Status	Status of Goals by Division.
Goal Status by Employee	Status of Goals by employee.
Item Ratings	Individual ratings, used to identify strengths and weaknesses.
Goal Cascade	Goal Cascade Report
Employee Goals	Individual Employee Goals with detailed information
Task Status	Summary of Tasks and their Status
Approval Status	Approval Status for all approvals

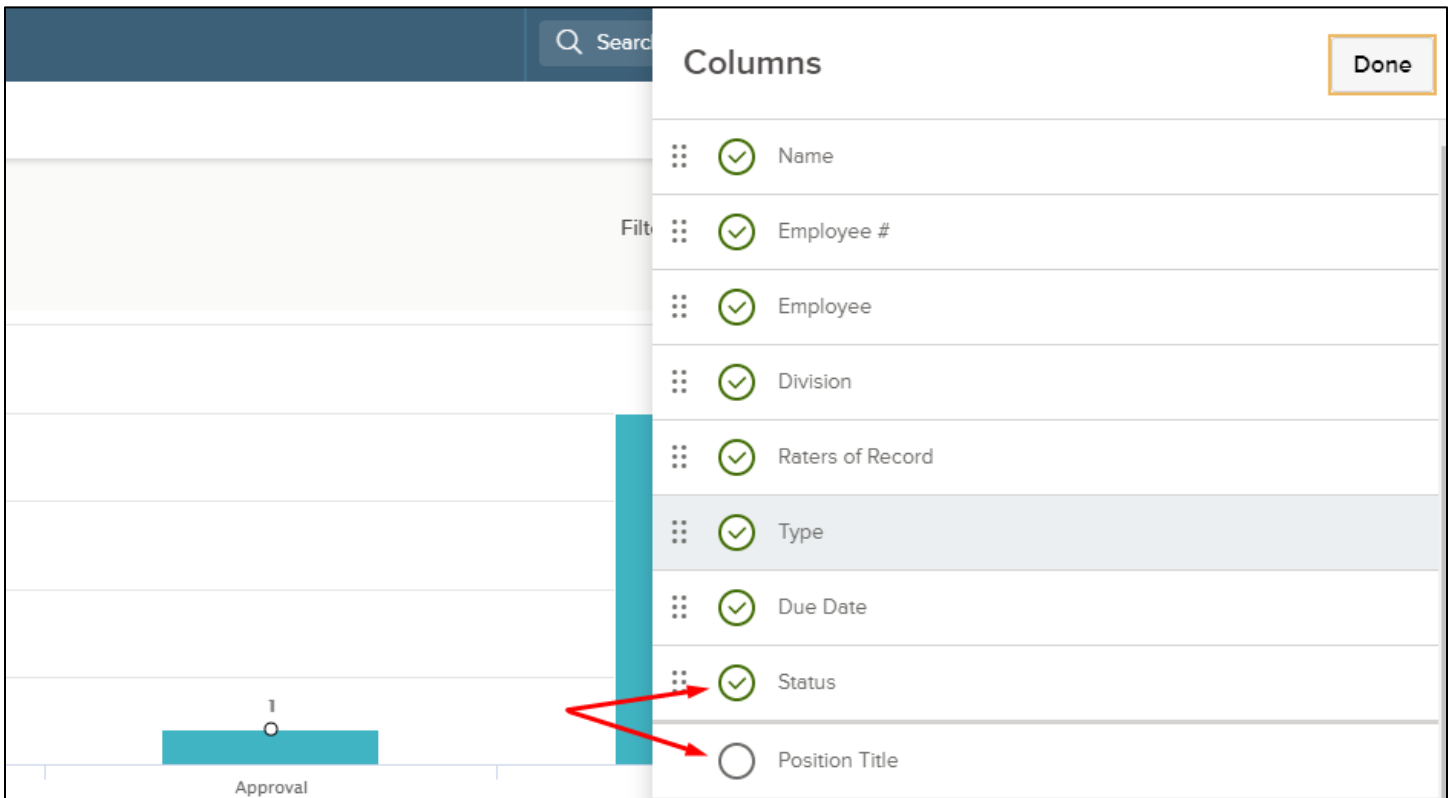
To run a report, click the report name. In this example, we use the **Evaluation Status Detail** report.



1. Upon selecting any part of the graph, the list directly below will filter to reflect the corresponding information.
2. Add **Columns** , **Filter** , or **Search**  any column
3. To export the grid, select the desired records by checking the box and then select **Bulk Actions**
  - 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 

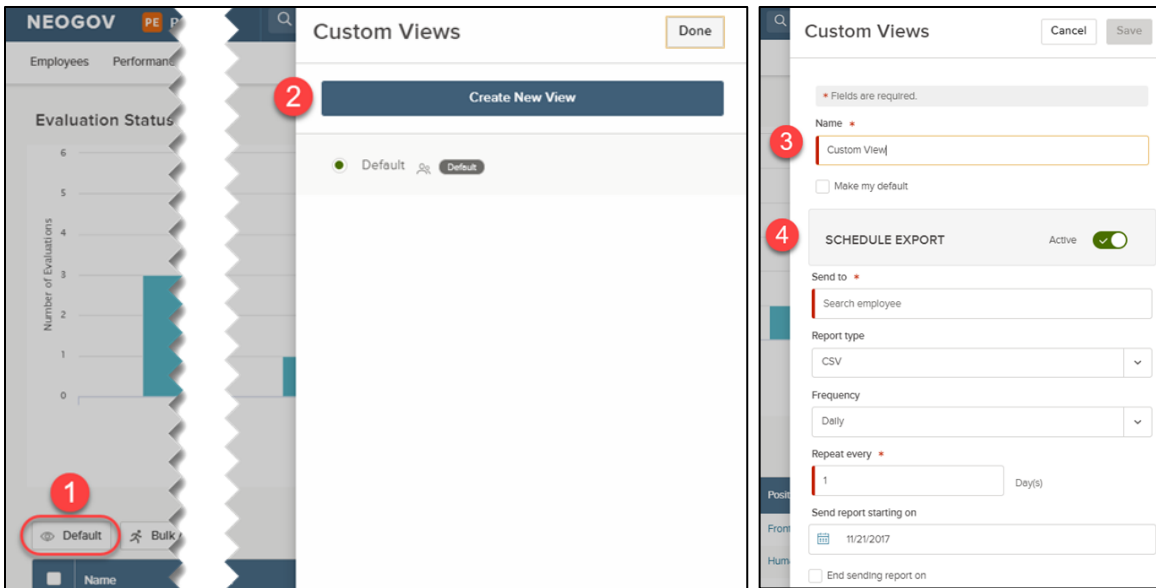
A fly-out will appear with all the fields that can be added to the report. Select the circle to add to the list, or select a checkmark to remove. Use the  icon to rearrange fields. Once you have configured your columns, select **done**.



## Schedule Reports

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.

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



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
5. Enter in all the appropriate and required information:
  - Which **employee** to send the report to
  - The **report type** (CSV, Excel, PDF)
  - The **frequency** for the system to generate the reports
    - How often you would like it to **Repeat**
  - Define the **start** and **ending** date of the report

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

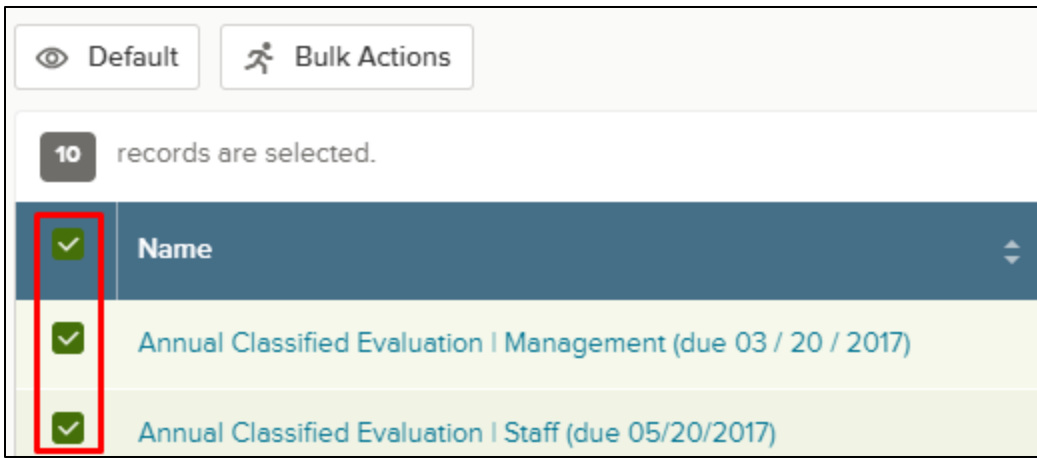


1. Select the custom view name predefined in the previous steps
2. Select **Default** and save

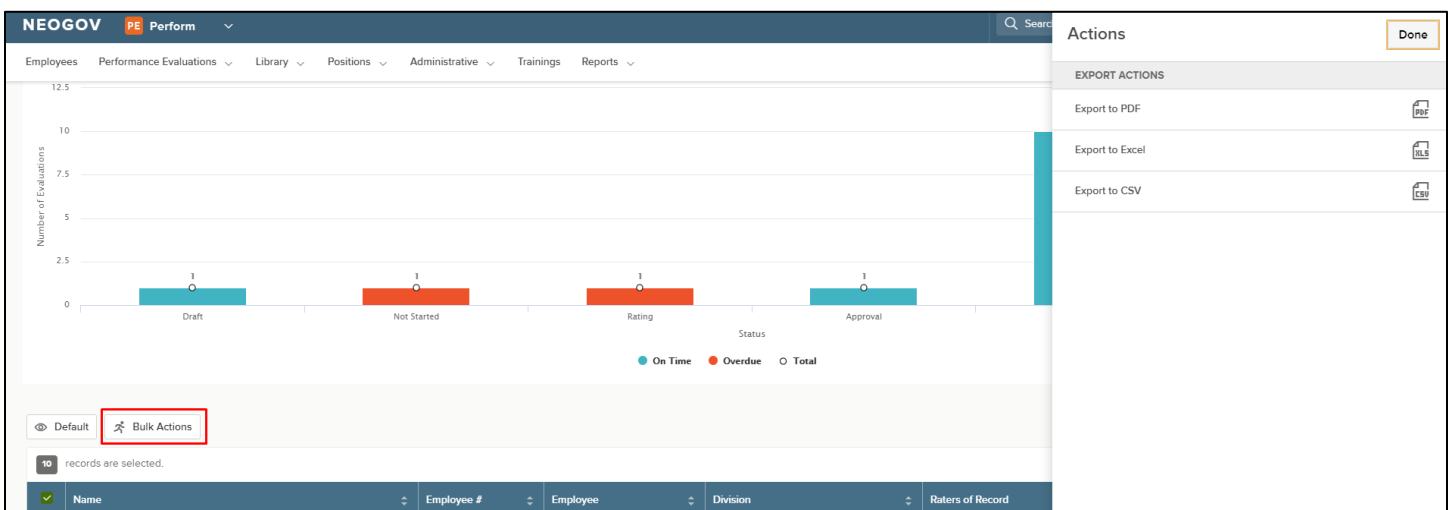
## Exporting Reports

To export the details, check the individual records you wish to export, or select all records:





Select the **Bulk Actions** button and a fly-out will appear with the different exporting options, i.e. **Export to PDF**, **Export to Excel**, or **Export to CSV**:



## SECTION 12 – PRINTING EVALUATION FORMS


### Print a Blank Evaluation Form

A blank evaluation form can now be printed from the evaluation detail screen.

From the very bottom of your evaluation dashboard, select the **evaluation name** to open the evaluation you'd like to print a blank form for.

	test	×	Q Evaluation Name	Q Department	Q Status
	test employee		Test Evaluation	DO Human Resources	Approval
	test employee		Another Test Evaluation	DO Human Resources	Not Started

This will open the evaluation details. Select **print blank form** on the top of the page to open the print preview.



test employee

### Another Test Evaluation

test employee

rate   print preview   copy evaluation   print blank form

Select your preferred print settings on the right and then select **print** in the top right.

test employee  
Student Aide

**Settings**

- General Information
- Rating Scales
- Notes & Attachments

### Print Preview

test employee  
Another Test Evaluation

Due Date: Fri, Nov 2, 2018  
Direct Manager: Brittany Needham

Rating Summary By: \_\_\_\_\_

**Content**

COMPETENCY SECTION | 3-POINT RATING SCALE      SECTION WEIGHT 22 %

**Core Competencies**



**Attendance**      ITEM WEIGHT 20 %

SCORE	NAME	COMMENT
3	Meets Standards	
2	Needs Improvement	
1	Fails to Meet Standards	


### Print Your Evaluation

To print your own completed evaluations, find **My Evaluation** on your evaluation dashboard. Select one of the evaluations shown or select **view all of my evaluations** to see a complete list.

My Evaluations [view all of my evaluations >](#)

 <b>Biennial Confidential Evaluation (due 04 / 21 / 2018 )</b> Due: <b>Sat, Apr 21, 2018</b> Status: <b>Not Started</b>	 <b>Biennial Confidential Evaluation (due 04 / 21 / 2016)</b> Due: <b>Fri, Jul 28, 2017</b> Status: <b>Completed</b>
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Select the title of the evaluation you'd like to print. From the evaluation details page, select **print preview**.

 <b>Brittany Needham</b>	<b>Biennial Confidential Evaluation (due 04 / 21 / 2018 )</b> <b>Brittany Needham</b> <a href="#">print preview</a> <a href="#">copy evaluation</a> <a href="#">print blank form</a>
--	--

Select your preferred settings on the right and then select **print** in the top right.

## SECTION 13 – Best Practices

Below are some useful tips to follow as managers complete evaluations in NEOGOV Perform.

### Before the Evaluation

#### *New Employees*

- Verify that new employees can access Perform. All new hires should be assigned a login upon hire. If they cannot access the system for some reason, contact Paola Lopez or Brittany Needham in Human Resources for assistance.
- Use your Outlook calendar to schedule 4-month probationary evaluations prior to the due date.
- Show new employees how to use the journal entry feature. Reference the training manual on the Intranet.

#### *Current Employees*

- Verify that new employees can access Perform. Current employees may still need to activate their account. If they cannot access the system for some reason, contact Paola Lopez or Brittany Needham in Human Resources for assistance.
- Set pending “Progress Achieved” goals for employee’s next evaluation.
- Maintain journal entries and encourage employees to journal relevant information throughout the year.

### During the Evaluation

- Enter as much detail as possible, including dates and occurrences of any events referenced.
- Review an evaluation prior to submission by printing from the rating form. Further instruction can be found in Section 7 under “Print Current State”.
- Ensure all future goals and progress achieved goals are accurately updated before submitting.
- Contact Human Resources if an evaluation needs to be modified after it has been approved.
- Once the evaluation is released to the employee (after the manager’s signature), contact the employee to set up a review date. Let the employee know that they must acknowledge the task “Review evaluation prior to meeting with manager” in NEOGOV before review date scheduled.
- Confirm the evaluation has been reviewed and approve the evaluation on the day of the meeting with the employee. The evaluation is considered complete when the final approval is completed.
- Allow time for the employee to sign the evaluation. This should be completed on the day the evaluation is reviewed, after the manager completes the final approval. Per the CSEA contract, bargaining unit members must sign the evaluation the day it is reviewed with their manager.

## SECTION 14 – 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@sccd.edu](mailto:brittany.needham@sccd.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@sccd.edu](mailto:brittany.needham@sccd.edu).