



Alcorn
State University

**NEOED-Performance Module
A User Guide for Supervisors and
Employees-
Performance Evaluations**

Contact:
hrm@alcorn.edu

This Training Guide focuses on navigating NEOED Perform (PE) and how to complete the routine employee and manager tasks that may arise during a performance evaluation (plan) year.

Pre-Requisite Requirements:

- The University is actively using NEOED Perform for performance management.
- Evaluations (Plans) have been assigned.

Helpful Tips:

- Performance plans can also be called evaluation plans.
- Clicking on the Dashboard icon in the upper left-hand corner always returns a user to their dashboard.
- Clicking on a task from the Unified Dashboard directs the user to the product to complete the task.

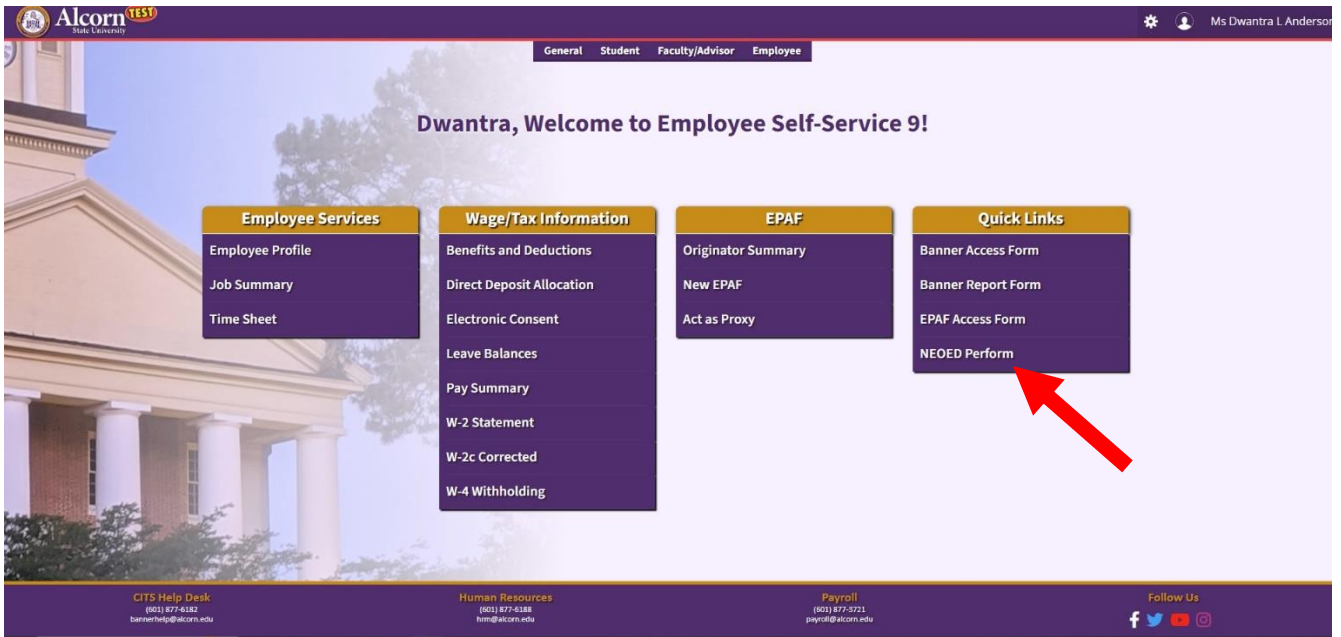
INDEX: Selecting a hyperlink below will take you to the section of interest.

1. [Login](#)
2. Overview of NEOED Perform
 - a. [Dashboard](#)
 - b. [Journal Entries](#)
 - c. [Check-Ins](#)
3. [Performance Evaluation \(Plan\) Overview](#)
4. [Add Content to Performance Evaluation \(Plan\)](#)
 - a. [Notes and Attachments within the Evaluation](#)
 - b. [Tasks](#)
 - c. [Start Evaluation](#)
5. [Acknowledgement of Evaluation \(Plan\)](#) (Employee)
6. [Ratings](#)
7. [Acknowledgement of Rating](#) (Employee)
8. [Reports](#)

LOGIN

NEOED can be accessed by navigating to the following website: <https://login.neoad.com>

NEOED can also be accessed via Online Banner Services.



The browser that works best with NEOED is Google Chrome.



1. Account Activation

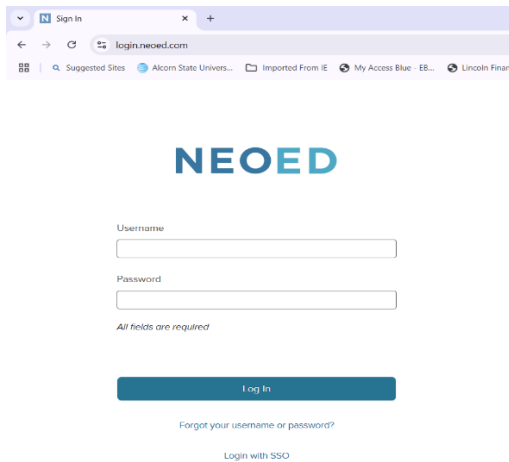
- A. You should have received an **Activate Your NEOED User Account** email with a link to create your account **Password** using your email address as your **Username**. This activation will expire after 24 hours. If you require a new activation, please contact HRM.

NOTE: Current NEOED users will use their existing username and password.

- B. Click on the **Log In >>** button.

2. Forgot Password

- A. To reset your password, click the **Forgot your username or password** link below the login button.



- B. Enter your **email address** and click on **Send Email**. A message will be sent containing your username and a link to reset your password.

[< Back to Login Page](#)

Login Assistance

Enter your email address and we'll send you your username and a link to reset your password.

Email

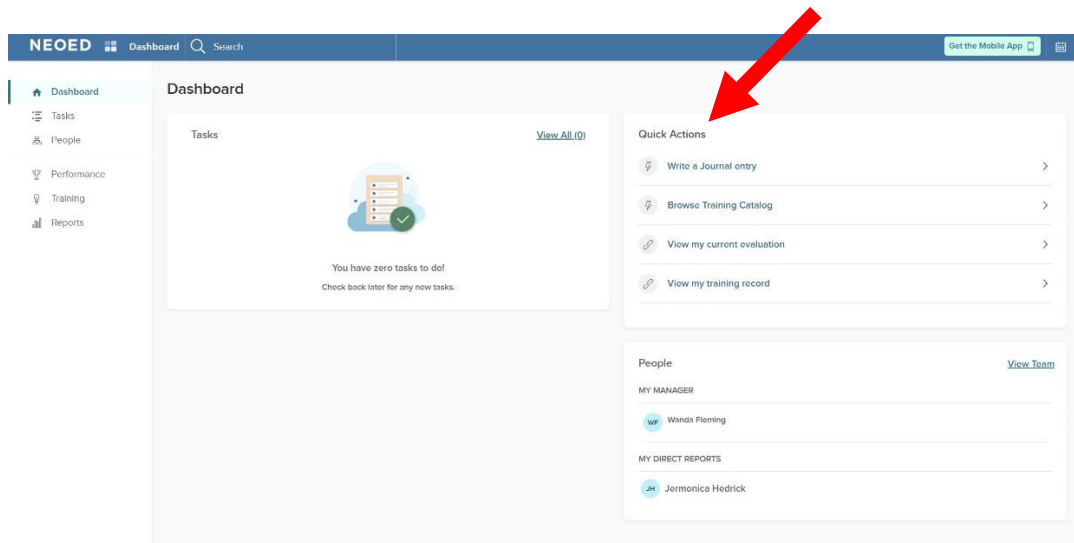
Send Email

Dashboard

Upon logging into Perform, you arrive at your **Dashboard**. The Unified Dashboard serves as your personal homepage in NEOED. It contains a section for assigned tasks and icons/links to employee performance evaluations. It contains the below sections:

1. **A left navigation section** for the NEOED product areas.
2. **My Tasks**-May display up to 5 tasks spanning all NEOED products based on due date, with the earliest displaying first.
3. **People**-Displays your manager and any direct reports (if applicable). Security is hierarchy-driven so you can only see other employees below you in the organizational structure.
4. **Quick Actions**-Displays quick links to common actions across the different product lines.

A. **Journal Entries** can be created from the Quick Actions section.



Regardless of where you are in NEOED, you can always return to your Unified Dashboard by clicking on **Dashboard** in the upper left corner of your screen.

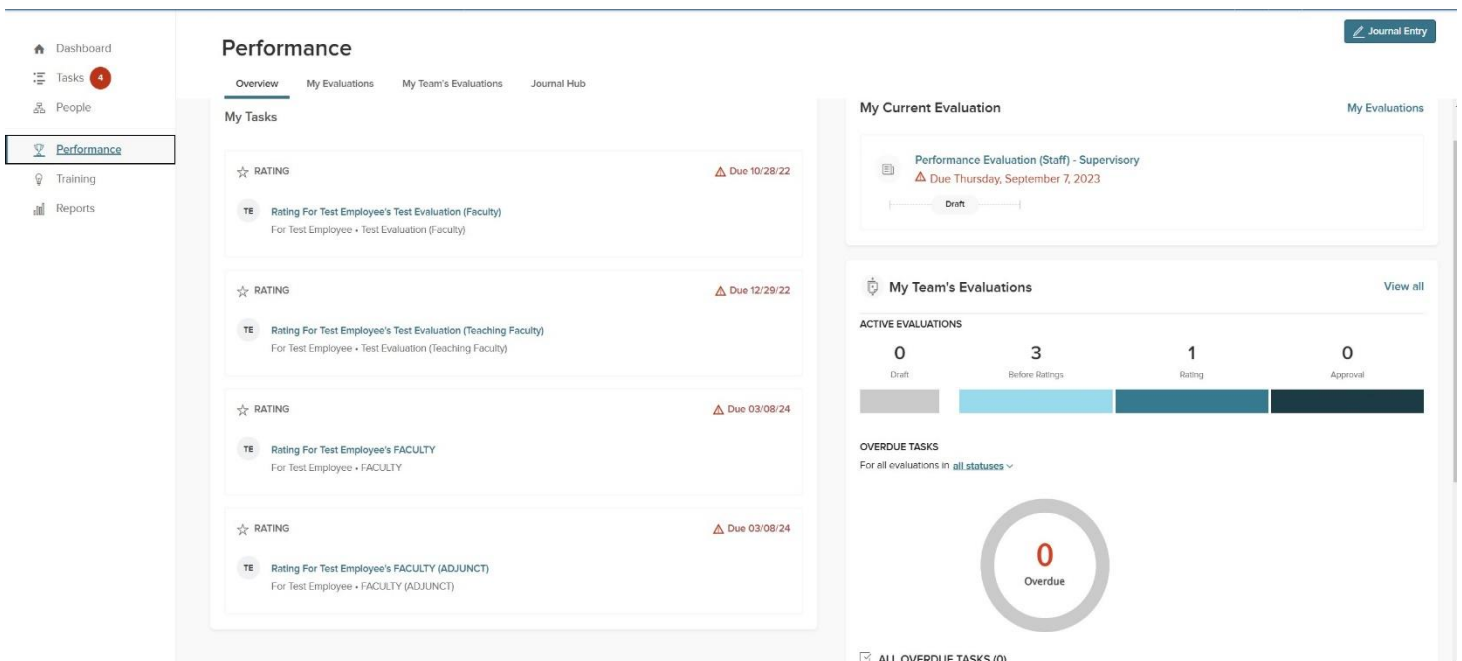


The **Left Navigation** of the Unified Dashboard contains a **Performance Tab**.

1. The **Overview** tab displays **My Tasks** (specific to NEOED Perform), **My Current Evaluation**, and **My Team's Evaluations** (for managers only).

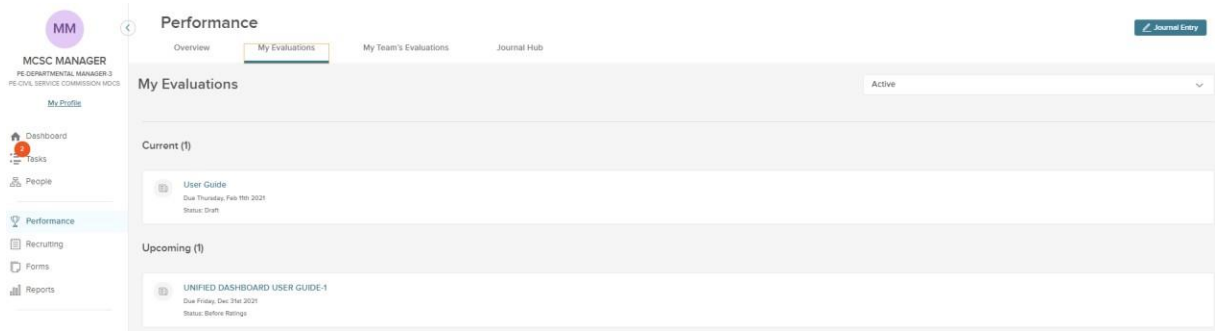
NOTE: Clicking on a **Task** will take you into **NEOED Perform** to complete the task.

NOTE: **Journal Entries** can be created from any of the Performance tabs using the **Journal Entry** button in the upper right corner.



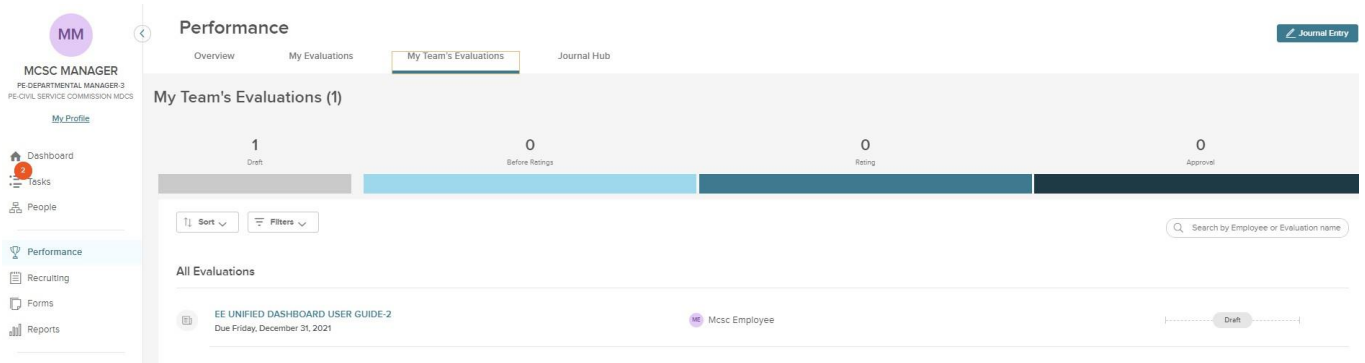
2. **My Evaluations**-Displays evaluations assigned to you. You can filter on **Active**, **Completed**, **Archived**, and **Canceled** evaluations.

NOTE: Clicking on an **Evaluation** name will take you to the specific evaluation in **NEOED Perform** to view it and/or complete any associated tasks.



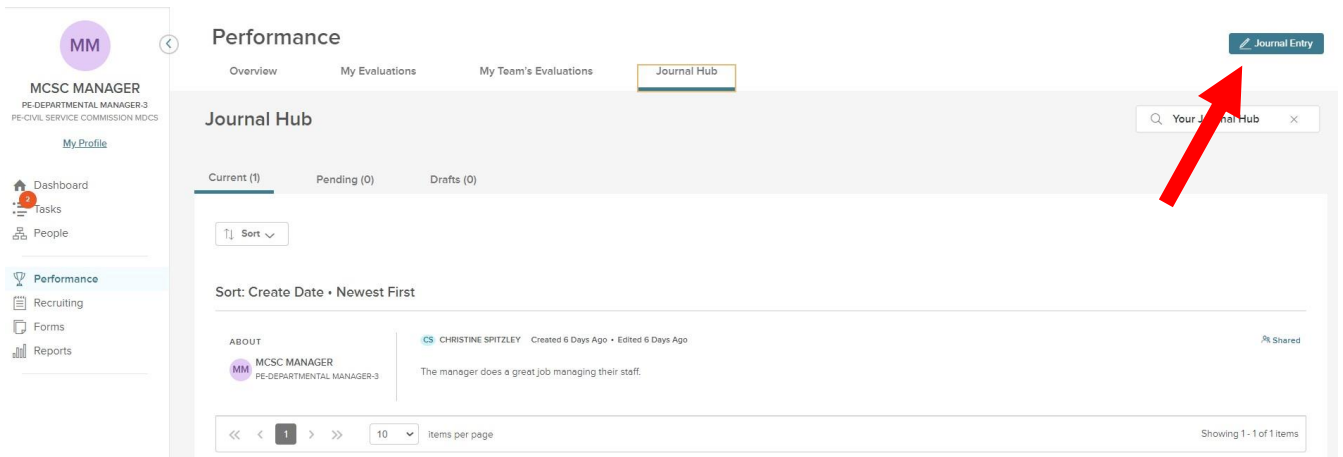
- 3. **My Team's Evaluations** (Managers only)-Displays the evaluations for employees in your hierarchy. This includes **Draft**, **Before Ratings**, **Rating**, and **Approval** statuses and can be filtered by employee.

NOTE: Clicking on an **Evaluation** name will take you to the specific evaluation in **NEOED Perform** to view it and/or complete any associated tasks.



- 4. **Journal Hub**-Displays your **Current**, **Pending**, and **Draft** journal entries. These can be sorted by **Create Date Newest First**, **Create Date Oldest First**, **Update Date Newest First**, and **Update Date Oldest First**.

Reminder: To create a new Journal Entry, click on the blue Journal Entry button in the upper right-hand corner of the screen.



Journal Entries

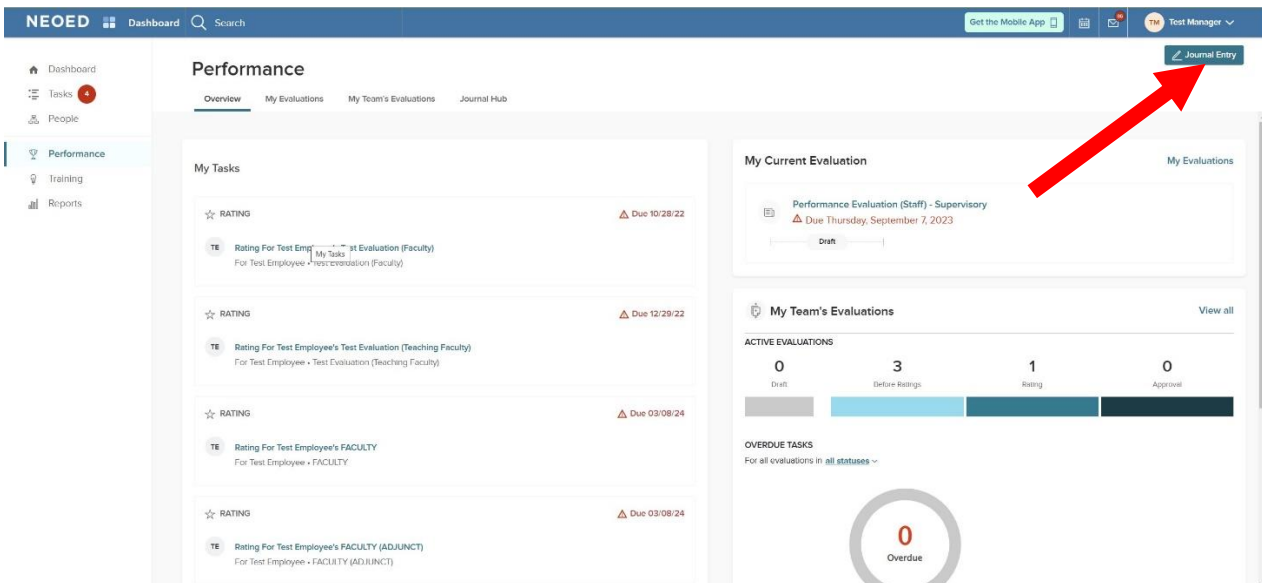
Journal entries are a helpful tool to foster and encourage communication between managers and direct reports in NEOED Perform. From the **Unified Dashboard**, journal entries can be entered from the **Dashboard tab, Performance tab, or from My Profile** and are available to the rater(s) during a performance evaluation (plan) rating.

- Only the original owner of a journal entry can edit or delete it.
- Journal entries are private unless made viewable using the share with feature.
- Objectives and competencies can be tagged in the text of a journal entry which allows for filtering within the rating card.
- Journal entries can be edited, printed, deleted, or archived by the creator only.

1. After logging in, you will be at your **Dashboard**.
2. As an **employee**, to enter a journal entry for **yourself** you have three options:

Option 1: From the **Dashboard** tab, under **Quick Actions**, click on **Write a Journal entry**. This option requires the user to enter who the journal entry is about.

Option 2: From the **Dashboard**, click on the **Performance** tab. Click on the **Journal Entry** button in the upper right-hand corner. This option requires the user to enter who the journal entry is about.



1. A slide-out window opens. **Enter who the journal entry is about, the text of the journal entry, and tag whomever the entry should be shared with.**
2. **Tagging Objectives/Competencies:** Objectives/Competencies located in existing evaluations can be tagged by typing the “@” symbol and the beginning of the objective/competency. For example, @adapt would result in adaptability being available for selection within the journal entry text.
3. Click on **Submit Journal Entry** to save it. Options to **Discard the Draft** or **Keep as Draft** are also available.

NOTE: Clicking on **Past entries** displays previously entered journal entries for the selected employee.

Write a Journal Entry
Close

* Who is this entry about?

TM Test Manager

New Entry Past Entries

B i U A: ≡ ≡ ≡ ¶ 🔗 📄 🖼️

Press Alt + F10 to move to the toolbar. Press ALT + O for Help.

Did you know? You can tag your Journals with Competencies and Goals from recent/upcoming evaluations by typing “@” along with the name of the item. Tagging is only applicable for one user at a time.

Who do you want to share this entry with?

Employee

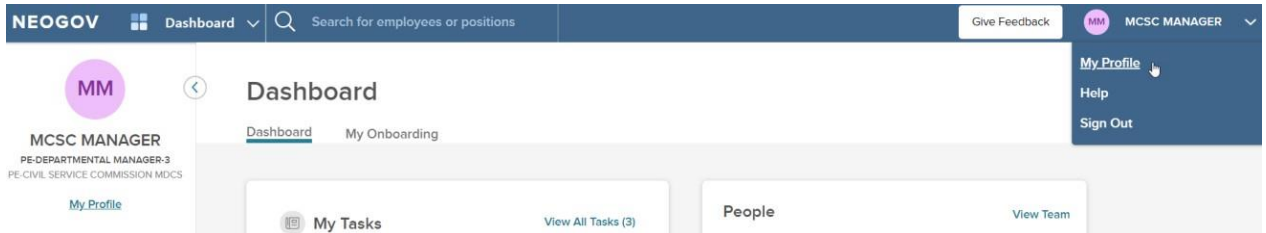
Manager(s) 👤

Manager's Manager

Submit Journal Entry

- The system will remain on the **Journal Entry** page to allow for additional Journal Entries for the employee. When finish entering Journal Entries, click on the **Close** button to return to the previous page.

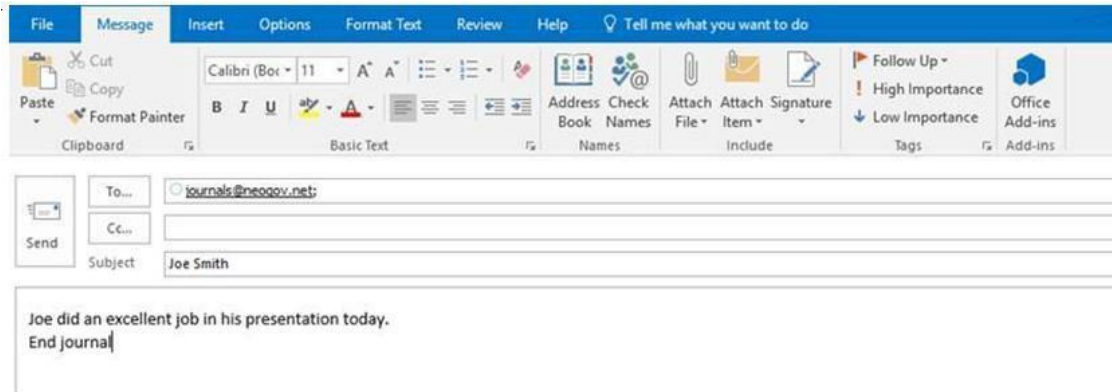
Option 3: Use the **drop-down arrow next to your name and click My Profile** (upper right-hand corner) or click on **My Profile** in the **Left Navigation**.



- Under the **Actions** button, click on **Write Journal Entry**. This option automatically **populates your name** for who the journal entry is about.
- A slide-out window opens. **Enter the text of the journal entry, and tag whomever the entry should be shared with.**
- Tagging Objectives/Competencies: **Objectives/Competencies** located in existing evaluations can be tagged by typing the “@” symbol and the beginning of the objective/competency. For example, **@adapt would result in adaptability** being available for selection within the journal entry text.
- Click on **Submit Journal Entry** to save it. Options to **Discard the Draft** or **Keep as Draft** are also available.
- Clicking on **Past entries** displays previously entered journal entries for the selected employee.

 A screenshot of the 'Write a Journal Entry' form. At the top right is a 'Close' button. Below it is a field labeled '* Who is this entry about?' with a dropdown menu showing 'Test Manager'. Below this are two tabs: 'New Entry' (selected) and 'Past Entries'. The 'New Entry' tab contains a rich text editor with a toolbar (Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Link, Unlink, Image) and a text area. Below the text area is a note: 'Press Alt + F10 to move to the toolbar. Press ALT + 0 for Help.' At the bottom, there is a blue information box with a question mark icon: 'Did you know? You can tag your journals with Competencies and Goals from recent/upcoming evaluations by typing "@" along with the name of the item. Tagging is only applicable for one user at a time.' Below this is a section 'Who do you want to share this entry with?' with three checkboxes: 'Employee', 'Manager(s)', and 'Manager's Manager'. At the bottom right is a 'Submit Journal Entry' button.

6. The system will remain on the **Journal Entry** page to allow for additional Journal Entries for the employee. When finish entering Journal Entries, click on the **Close** button to return to the previous page.
3. **Journal entries** can also be added directly from **Outlook**. To send an email from Outlook to NEOED Perform:
 - a. Enter the email address journals@neod.com into the “**To**” section.
 - b. In the “**Subject**”, enter the **employee’s name** (only) for whom the journal entry is for. The employee’s name must be spelled correctly and match the employee information in Perform.
 - c. Content entered in the email will be loaded as the journal entry. After entering the journal entry content, type **End journal** so that the system can exclude signatures and other miscellaneous text from being included in the journal entry.



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

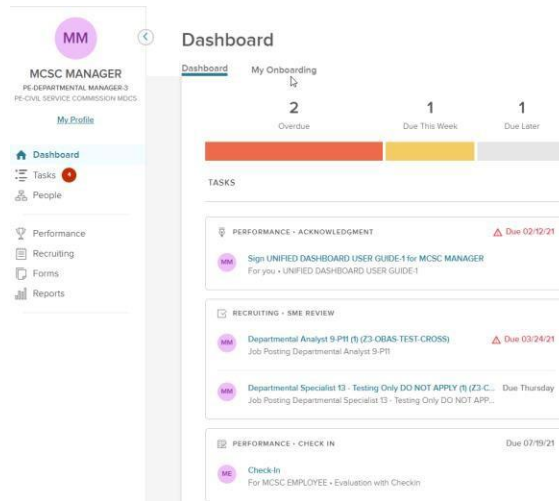
Note: You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

Check-Ins

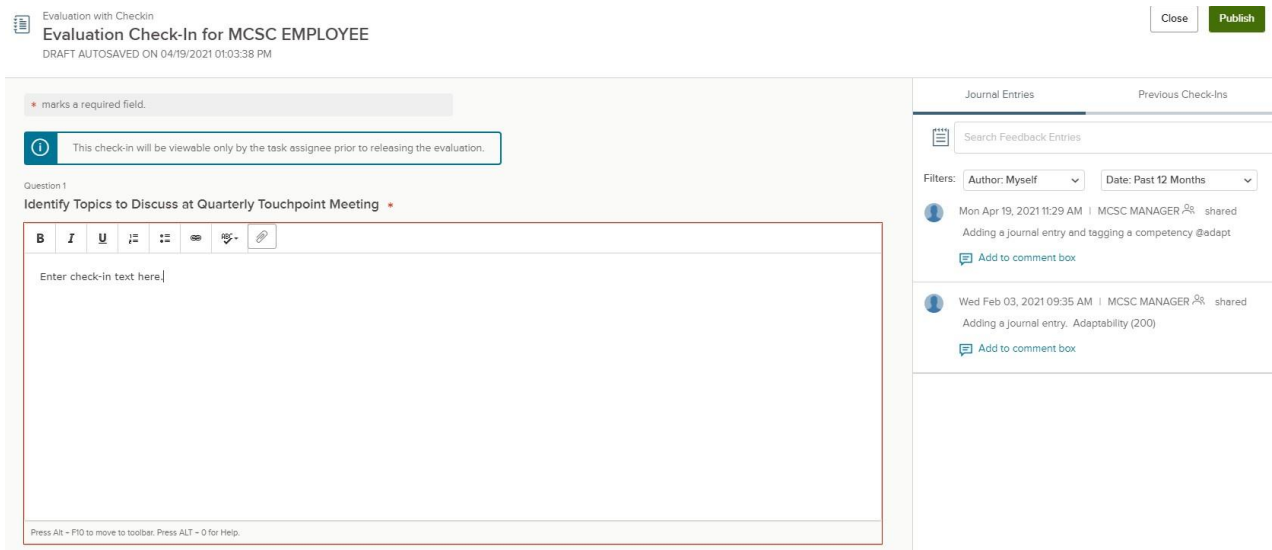
1. If a check-in task is assigned to you, when the evaluation is at that step in the process, you will receive an email regarding the task. It will also show up in the **Tasks** section of your dashboard.
 - a. Wait until the task **Due Date** before completing the Check-In Task.
 - b. If the Check-In is part of a **sequence** of tasks, as soon as the current Check-In is completed, the next Check-In task in the sequence will populate on your dashboard. It is important to verify the task Due Date before completing it. Once completed, the task **cannot be unlocked** or moved back in the process.
2. On the **Dashboard** click on the **Check-In** Task to be completed.

NOTE the following:

- The **Task Name** is Check-In
- The **Employee** associated to the Check-In Task
- The **Evaluation** that the Check-In Task is located
- The **Due Date** of the Check-In Task



- Click on the **Task** name, **Check-In**, to go to NEOED Perform and complete the task. In the **Check-In Window** answer the **required question**. Journal Entries and previously entered Check-Ins are available to add to the comments box. Click on **Publish**.



- After clicking on **Publish**, you will be taken back to your Dashboard. The completed Check-In task will no longer appear in the Task section; however, the next Check-In sequence will be available (if applicable) with a **future due date**. **Do not complete the next Check-In until it is due**.

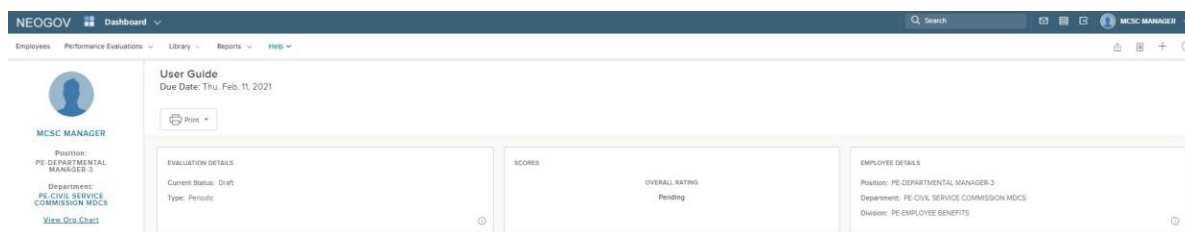
Performance Evaluation (Plan) Overview

Employee performance evaluations (plans) will be established for all employees. These evaluations will include tasks to acknowledge the evaluation (plan) and ratings. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the “current” view of the **My Tasks** section on the dashboard.

NOTE: The **acknowledgement task** will not populate in the **tasks section** of the dashboard for the employee until the performance evaluation (plan) has been started by the manager/supervisor. How to acknowledge a performance evaluation (plan) and rating is covered in the **Acknowledgement of Evaluation (Plan) and Acknowledgement of Rating sections** of this document.

Evaluation Details Page:

1. The top of the **Evaluation Details** page lists information specific to the performance evaluation (plan) including name, due date, current status, type (periodic or probation), position, and department.
2. The performance evaluation (plan) will be in **Draft Status** upon receipt and will remain in that status until it is started by the manager. Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started the evaluation.
3. Alcorn State have established performance evaluation (plan) dates. The dates you receive will reflect the established dates for your department or organizational unit including the **Due Date**.
4. The **Overall Rating** will display as Pending until the performance evaluation (plan) rating has been completed by the manager/supervisor.
5. If your unit is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.
 - a. The Print button does not populate the content of the evaluation, such as rating comments for the employee, until the rating has been completed and submitted by the rater (manager/supervisor).



6. The **Evaluation Details** page will default to displaying the **Evaluation Content**.
 - a. **Objectives** are the individual actions the manager/supervisor and employee agree will be rated in this performance evaluation (plan) for the rating period. Objectives should be SMART (Specific, Measurable, Attainable, Relevant, and Time-Based).
 - i. **Add/edit/delete Objectives:** Employees/Managers can add, edit, and delete objectives until the performance evaluation (plan) is started.
 1. To edit objectives after the evaluation (plan) is started, use the pause button and make the changes. Once the changes have been made, the **manager** needs to click on the **Start button** to regenerate the acknowledgement task for the employee.

NOTE: Only the user entering the objective can edit or delete it.
 - b. **Competencies** are assigned to the performance evaluation (plan).
 - i. **Add/edit/delete Competencies:** Employees/Managers can add, edit, and delete competencies until the performance evaluation (plan) is started.
 1. To edit competencies after the evaluation (plan) is started, use the pause button and make the changes. Once the changes have been made, the **manager** needs to click on the **Start button** to regenerate the acknowledgement task for the employee.
 - c. Some Managers/Supervisors may solicit employee assistance in the addition of

competencies. Other Managers/Supervisors may complete all the evaluation (plan) updates in Perform.

User Guide
Due Date: Thu, Feb. 11, 2021

Print

EVALUATION DETAILS		SCORES	EMPLOYEE DETAILS
Current Status:	Draft	OVERALL RATING	Position: PE DEPARTMENTAL MANAGER-3
Type:	Periodic	Pending	Department: PE CIVIL SERVICE COMMISSION MDCS
			Division: PE EMPLOYEE BENEFITS

Content Process

Objective Section | STANDARD 3 POINT SCALE

Items	Description	Progress
Assign an Objective Here	Add objective text.	0%

Competency Section | STANDARD 3 POINT SCALE

Items	Description
Valuing Diversity and Inclusion (20%)	Actively appreciating and including the diverse capabilities, insights, and ideas of others and working effectively and respectfully with individuals of diverse backgrounds, styles, abilities, and motivations.
Delegating Responsibility (20%)	Allocating decision-making authority and/or task responsibility to appropriate others to maximize the organization's and individual's effectiveness.

7. Notes/Attachments can be added within the evaluation with items specific to the rating period.

NOTE: This section cannot be modified once entered. Please contact HR for assistance in editing/removing content from this section.

Notes & Attachments

+ Add Notes & Attachments

8. The Process Timeline portion of the performance evaluation (plan) includes the following:

- a. The **Before Ratings Signature** for the employee (**Evaluation (Plan) Acknowledgement**) is defaulted via the performance evaluation (plan) program. The acknowledgement is used to have an employee certify that they have seen and reviewed the objectives and competencies assigned in the performance evaluation (plan) that will be used for the current rating period.

NOTE: The evaluation (plan) acknowledgement task is not available to an employee until the performance evaluation is **started by the manager**. How to acknowledge a performance evaluation (plan) is covered in the **Acknowledgement of Evaluation (Plan)** section of this document.

USER GUIDE EVAL
Due Date: Fri, Dec. 31, 2021

Copy Print Pause

EVALUATION DETAILS		SCORES	EMPLOYEE DETAILS
Current Status:	Before Ratings	OVERALL RATING	Position: PE DEPARTMENTAL ANALYST-A
Type:	Periodic	Pending	Department: PE CIVIL SERVICE COMMISSION MDCS
Evaluation Program:	1901 CSC STANDARD		Division: PE BAS SECURITY

Content Process

* indicates a required step

1. **Before Ratings**

Signature *	Due	Status
MCSC EMPLOYEE	Mon, Apr 26, 2021	Current
2. **Ratings**

Rating *	Due	Status	Weight
MCSC MANAGER	Fri, Dec 31, 2021	Pending	100%
3. **After Ratings**

Signature *	Due	Status
MCSC EMPLOYEE	Fri, Dec 31, 2021	Pending

- b. The **Rating of Record (supervisor/manager rating)** is assigned on the performance evaluation (plan) program.

NOTE: The manager/supervisor is required to rate the employee before the performance evaluation (plan) due date. The manager/supervisor rating due date in the example above is Dec 31, 2021. The manager/supervisor serves as the **Rater of Record**.
 - c. The **After Ratings Signature** for the employee (**Rating Acknowledgement**) is defaulted via the performance evaluation (plan) program. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance evaluation (plan) rating for the current rating period. How to acknowledge a performance rating is covered in the **Acknowledgement of Ratings section** of this document.
 - d. Tasks can be added to the performance evaluation (plan) and will be covered in the **Notes/Attachments/Tasks** section of this document.
9. When the performance evaluation (plan) is ready for employee acknowledgement, the Manager/Supervisor will **start** the evaluation (plan). Once the evaluation (plan) is started, changes cannot be made to the evaluation (plan) unless it is reverted to draft status by using the **Pause Evaluation** button at the top of the evaluation. This will be covered in more detail in the **Edit/Start Performance (Evaluation) Plan** section of this document.
 10. After the performance evaluation (plan) is started, an email is sent to the employee asking them to acknowledge the evaluation (plan). After the acknowledgment of the evaluation (plan), if additional acknowledgements or employee self-ratings are not required, a **Rate** task and button appears for the manager indicating the evaluation (plan) is ready for rating. (A rate task/button will only populate for the employee if a self-rating is assigned to the evaluation).
 11. Once ready for acknowledgement/review, the **Status** of the performance evaluation (plan) changes from **Draft** to **Before Ratings**.
 12. The performance evaluation (plan) content, such as objectives/competencies, can now be printed using the **Print** feature.

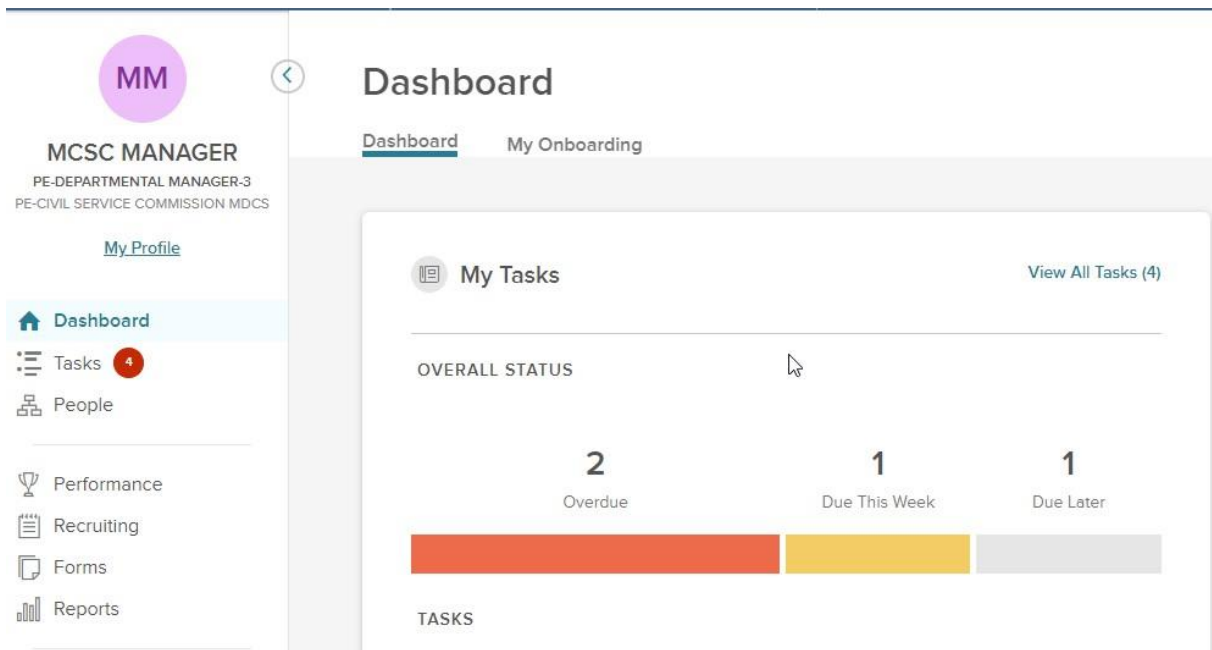
The screenshot displays the NEOGOV system interface. At the top, there is a navigation bar with 'NEO GOV' and 'Dashboard' menus, along with a search bar. Below this is a secondary navigation bar with links for 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main content area is divided into several sections:

- User Profile:** A circular profile picture placeholder, the name 'MCSM MANAGER', and job details: Position: PE-DEPARTMENTAL MANAGER-3, Department: PE-CIVIL SERVICE COMMISSION MDCS, and a link to 'View Org Chart'.
- Document Header:** 'UNIFIED DASHBOARD USER GUIDE-1' with a 'Due Date: Fri, Dec 31, 2021'. Below this are 'Sign' and 'Print' buttons.
- EVALUATION DETAILS:** A panel showing 'Current Status: Before Ratings' and 'Type: Periodic'.
- SCORES:** A panel showing 'OVERALL RATING: Pending'.
- EMPLOYEE DETAILS:** A panel showing 'Position: PE-DEPARTMENTAL MANAGER-3', 'Department: PE-CIVIL SERVICE COMMISSION MDCS', and 'Division: PE-EMPLOYEE BENEFITS'.

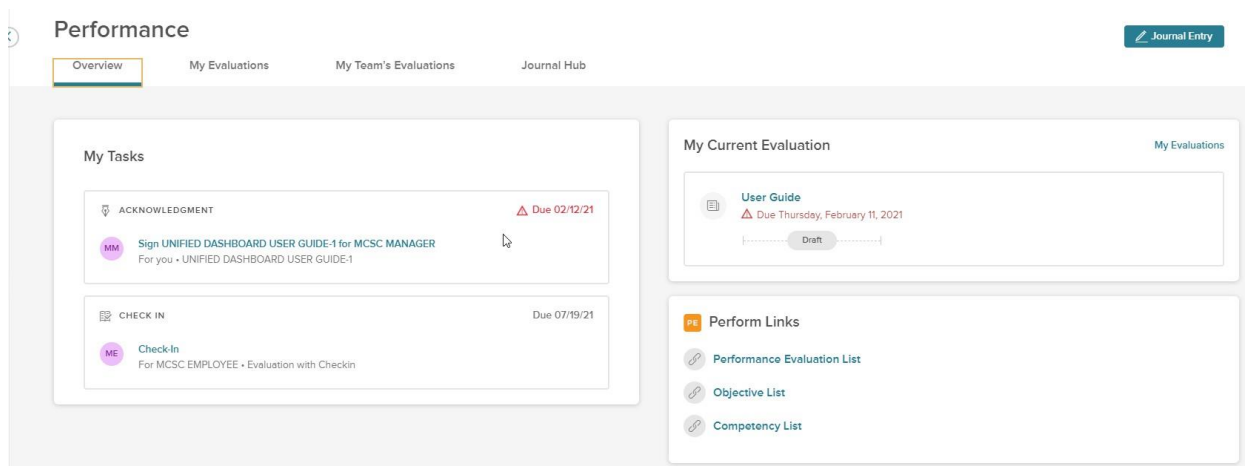
Add Content to Performance Evaluation (Plan)

After logging in, from the **Dashboard**, one of the following will apply:

1. **Employee**—Click on the **Performance tab** from the left navigation menu.



- a. The **Performance** tab will open to the **Overview** menu option. On the **Overview** page, you can see your **current evaluation in the My Current Evaluation section**. This section provides the name of the evaluation, the due date, and its current status. To access the content of the evaluation, **click on the Evaluation Title**.



- b. The **My Evaluations** link in the My Current Evaluation section of the Overview tab, and the **My Evaluations menu** tab both take you to the page that displays all your evaluations. To access the content of an evaluation, **click on the Evaluation Title**.

Performance

Overview

My Evaluations

My Team's Evaluations

Journal Hub

My Evaluations

Current (1)



User Guide

Due Thursday, Feb 11th 2021

Status: Draft

Upcoming (1)



UNIFIED DASHBOARD USER GUIDE-1

Due Friday, Dec 31st 2021

Status: Before Ratings

2. **Manager**-there are **Two** ways to access the evaluations of your direct reports.

Option 1: From your **Dashboard**, in the **People** section, click on the name of the direct report whose performance evaluation (plan) you wish to view/edit/start.

Dashboard

Dashboard My Onboarding

The screenshot shows a dashboard with two main sections. The 'My Tasks' section on the left has a title 'My Tasks' and a link 'View All Tasks (4)'. Below it, under 'OVERALL STATUS', there are three bars representing task counts: 'Overdue' with a count of 2 (orange bar), 'Due This Week' with a count of 1 (yellow bar), and 'Due Later' with a count of 1 (grey bar). The 'People' section on the right has a title 'People' and a link 'View Team'. It lists 'MY MANAGER' as 'MCSC 2ND LINE MANAGER' and 'MY DIRECT REPORTS' as 'MCSC EMPLOYEE - Onboarding'.

1. You will be taken to your direct report's **People/Employee Profile** (Employee Details page).
 - a) Click on the **Performance** tab to see all the employees' evaluations.

ME **MCSC EMPLOYEE**
PE-DEPARTMENTAL ANALYST-A
PE-CIVIL SERVICE COMMISSION MDCS

Job & Pay **Performance** Documents Onboarding

Performance

Performance Evaluations Active

Current

Testing Conditional Step
⚠ Due Wednesday, March 31, 2021 • Type: Periodic

Before Ratings Rating Approval

- b) Select the **Performance Evaluation** (Plan). The system will redirect you to the NEOED Performance product, **Evaluation Details** page. Enter the **content** (Objectives/Competencies) and then “start” it by clicking on the **Start** button.

Option 2: From your **Dashboard**, click on the **Performance** tab in the **Left Navigation** menu.

MM
MCSC MANAGER
PE-DEPARTMENTAL MANAGER-3
PE-CIVIL SERVICE COMMISSION MDCS

[My Profile](#)

- Dashboard**
- Tasks **4**
- People
- Performance
- Recruiting
- Forms
- Reports

Dashboard

Dashboard My Onboarding

My Tasks

OVERALL STATUS

2
Overdue

TASKS

2. From the **Performance** page, click on the **My Team's Evaluations** tab.

NOTE: This page can be filtered by employees.

3. Select the **Performance Evaluation (Plan)** for the employee. The system will redirect you to the NEOED Performance product, **Evaluation Details** page. Enter the **content** (Objectives/Competencies) and then “start” it by clicking on the **Start** button.

The screenshot shows the 'Performance' page with the 'My Team's Evaluations' tab selected. The progress bar indicates 0 Draft, 2 Before Ratings, 0 Rating, and 2 Approval. Below the progress bar, there are 'Sort' and 'Filters' buttons, and a search bar labeled 'Search by Employee or Evaluation name'. The 'All Evaluations' section lists two evaluations: 'Evaluation with Checkin' due Monday, January 31, 2022, and 'USER GUIDE EVAL' due Friday, December 31, 2021. Both evaluations are for 'Mscs Employee' and show a progress indicator with 'Before Ratings', 'Rating', and 'Approval' stages.

Notes & Attachments

1. **Notes & Attachments** can be added to the performance evaluation (plan) using the **Add Notes & Attachments** button.

The screenshot shows the performance evaluation details page for an 'MCSG EMPLOYEE'. The page is divided into sections: 'Objective Section', 'Competency Section', and 'Evaluation Overall Section'. The 'Notes & Attachments' section is highlighted, showing a text input area and a '+ Add Notes & Attachments' button. The 'Objective Section' and 'Competency Section' each have a table with columns for 'Items', 'Description', 'Progress', and 'Actions'. The 'Objective Section' table has one row with 'Add Objective Name Here' and 'Add the description in this box.' The 'Competency Section' table has four rows with items like 'Adaptability (200)', 'Building Strategic Working Relationships (...)', 'Adaptability (100)', and 'Applied Learning (100)'. The 'Evaluation Overall Section' has an 'Overall Rating' field. The 'Notes & Attachments' section is at the bottom of the page.

a. Notes can be typed directly. Some formatting including a spell-checking function is available. Attachments can be added by using the **+Attachment** button. If the **Private Note** is checked, only the person entering the note can see it. Click **Save**.

Note

B **I** U

Press Alt + F10 to move to toolbar. Press Alt + 0 for Help.

Attachment

+ Attachment

Nothing selected

*Add one attachment per note.

Private Note

Tasks

1. The **Process Timeline Tasks** for the employee's evaluation (plan) acknowledgement, rating acknowledgement, and the manager/supervisor review will be defaulted into the evaluation (plan) from the performance evaluation (plan) program. These tasks will appear on the associated employee's (and manager/supervisor's) Dashboard. Reminder and overdue notices are sent based on the evaluation (plan) program configuration.

Start Evaluation

1. When the performance evaluation (plan) is ready for employee acknowledgment (certification), it can be **started** by clicking on the **Start** button. Once the evaluation (plan) is started, changes cannot be made to the evaluation (plan) unless reverted to **draft** status by clicking on the **Pause Evaluation** button.

The screenshot displays a user interface for an evaluation. On the left, there is a profile card for an 'MCSC EMPLOYEE' with a blue silhouette icon. The employee's position is 'PE-DEPARTMENTAL ANALYST-A' and their department is 'PE-CIVIL SERVICE COMMISSION'. A link to 'View Org Chart' is provided. On the right, the evaluation title is 'USER GUIDE EVAL' with a due date of 'Fri. Dec. 31, 2021'. Below this are 'Print' and 'Start' buttons. A section titled 'EVALUATION DETAILS' shows the 'Current Status' as 'Draft' and the 'Type' as 'Periodic'. An information icon is located in the bottom right corner of the details section.

2. After the performance evaluation (plan) is started, an email is sent to the employee notifying them to acknowledge the evaluation (plan). Acknowledgment of the evaluation (plan) is the first step in the evaluation process.
3. The performance evaluation (plan) can be paused/reverted to draft status if changes need to be made to any part of it via the **pause button**. If changes are made to the Objectives and/or Competencies sections, once the evaluation (plan) is **started** again, the **Acknowledgement email** for the employee will be retrIGGERED asking for their signature (certification).

USER GUIDE EVAL
Due Date: Fri. Dec. 31, 2021

Print Pause

EVALUATION DETAILS

Current Status: Before Ratings
Type: Periodic

- Once started, the **Status** of the performance evaluation (plan) changes from **Draft** to **Before Ratings**.

Acknowledgement of Evaluation (Plan)

- When an employee and manager agree on the performance evaluation (plan) established for the review period, including objectives and competencies, the manager will start the evaluation, locking it to additional changes. The employee will receive an **email** instructing them to login to NEOED Perform to acknowledge the performance evaluation (plan). The email will look like the one below.

NEOGOVS PE-Task Sign User Guide-1 for Due 10/28/2019 Is Assigned to You

donotreply@neogov.com
Tue 6/9/2020 3:12 PM
To: You

NEOGOVS

Dear **Employee Name**,

You are receiving this email because you have a task assigned to you in NEOGOVS Perform:

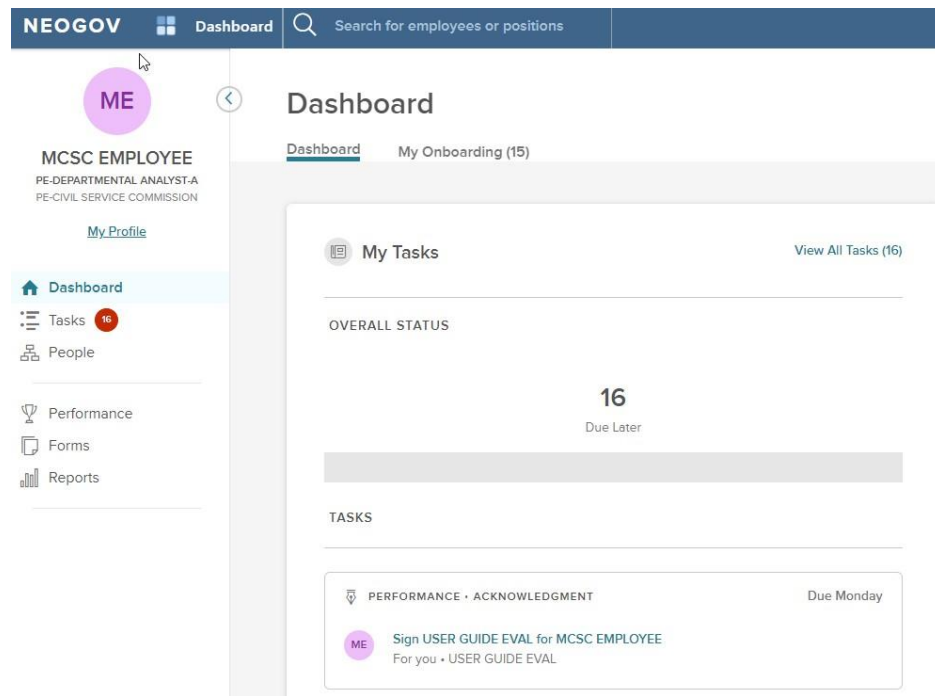
- The **acknowledgement of your evaluation plan** task is assigned once your manager/supervisor starts your evaluation plan.
- Other tasks, such as touchpoint meetings and/or check-ins, may be assigned as acknowledgement tasks throughout the evaluation period.
- The **rating** task is assigned once the acknowledgement of evaluation plan task, and any other pre-rating acknowledgement tasks are complete.
- The **acknowledgement of rating task** is assigned once your manager/supervisor rates your evaluation plan.
- All tasks may include a reminder notice and overdue notice emails.

Please use the link below to login, view, and confirm the task(s) and their associated due date(s).

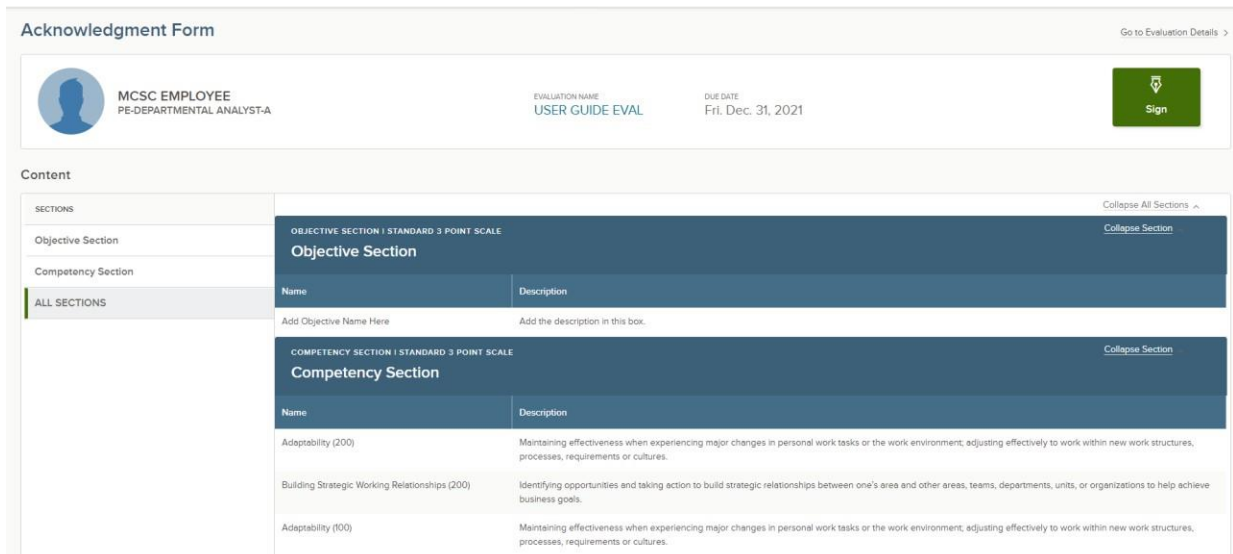
Note: You can also access tasks from your dashboard in NEOGOVS Perform.

Subject: [Sign User Guide-1](#)
Due Date: 10/28/2019
Priority: Low
Task status: Current
Comment:

- On the **Dashboard** screen, the employee will see an Acknowledgement task listed in the **My Tasks** section. Click on the subject, **Sign...** that will take you to the Performance product, Acknowledgement window.



3. In the **Evaluation Acknowledgement (Before Ratings)** window, review the assigned performance evaluation content. To see only objectives or only competencies click on the specific section.
 - a. If questions or concerns need to be addressed before completing the acknowledgement task, return to your dashboard by clicking on **NEOED** or **Dashboard**. The task will remain active in your Tasks section of the dashboard. If you do not acknowledge your evaluation (plan), please follow up with your manager.



4. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge the evaluation (plan) by clicking on **Submit**. The evaluation will now be available to the manager for rating.

NOTE: Clicking on the **Cancel** button will return you to your dashboard without acknowledging the evaluation (plan). If you do not acknowledge your evaluation (plan), please follow up with your manager.

The screenshot displays the 'Acknowledgment Form' in the NEOGOV system. At the top, it identifies the employee as 'MCS C EMPLOYEE, PE-DEPARTMENTAL ANALYST-A' and the evaluation as 'USER GUIDE EVAL' with a due date of 'Fri. Dec. 31, 2021'. The form is divided into 'Objective Section' and 'Competency Section', each with a table for 'Name' and 'Description'. A signature area on the right shows a handwritten signature 'MCS C EMPLOYEE' and the date 'April 23, 2021'. A 'Sign' panel at the top right contains a 'Skip to Content' button, a 'Cancel' button, and a green 'Submit' button.

5. The **Acknowledgement** will no longer appear on the **Dashboard** screen.

NOTE: If a performance evaluation (plan) is reverted to Draft Status, and a change is made to Objectives and/or Competencies, a new email will be triggered asking for acknowledgement of the updated evaluation (plan). Follow the steps above to re-acknowledge the modified performance evaluation (plan).

Rating (Rater of Record-Manager/Supervisor)

1. There are two options to get to the Rate screen:

Option 1: From the **Unified Dashboard, Tasks** section, click on the **Title** of the evaluation in the **Performance * Rating** section.

MM
MCSC MANAGER
 PE-DEPARTMENTAL MANAGER-3
 PE-CIVIL SERVICE COMMISSION

[My Profile](#)

- Dashboard
- Tasks **4**
- People
- Performance
- Recruiting
- Forms
- Reports

Dashboard

Dashboard | My Onboarding

TASKS

PERFORMANCE • ACKNOWLEDGMENT ⚠ Due 02/12/21

MM Sign UNIFIED DASHBOARD USER GUIDE-1 for MCSC MANAGER
 For you • UNIFIED DASHBOARD USER GUIDE-1

RECRUITING • SME REVIEW

MM Departmental Analyst 9-P11 (1) (Z3-OBAS-TEST-CROSS) ⚠ Due 03/24/21
 Job Posting Departmental Analyst 9-P11

MM Departmental Specialist 13 - Testing Only DO NOT APPLY (1) ... ⚠ Due 5 Days Ago
 Job Posting Departmental Specialist 13 - Testing Only DO NO...

PERFORMANCE • RATING Due 12/31/21

ME Rating For MCSC EMPLOYEE's USER GUIDE EVAL
 For MCSC EMPLOYEE • USER GUIDE EVAL

Option 2: From the **Unified Dashboard, Performance Tab**, click on the **Rating** task in the **My Tasks** section.

MM
MCSC MANAGER
 PE-DEPARTMENTAL MANAGER-3
 PE-CIVIL SERVICE COMMISSION

[My Profile](#)

- Dashboard
- Tasks **4**
- People
- Performance**
- Recruiting
- Forms
- Reports

Performance

Overview | My Evaluations | My Team's Evaluations | Journal Hub

My Tasks

ACKNOWLEDGMENT ⚠ Due 02/12/21

MM Sign UNIFIED DASHBOARD USER GUIDE-1 for MCSC MANAGER
 For you • UNIFIED DASHBOARD USER GUIDE-1

RATING Due 12/31/21

ME Rating For MCSC EMPLOYEE's USER GUIDE EVAL
 For MCSC EMPLOYEE • USER GUIDE EVAL

- On the **Performance Evaluation Rating Form** screen, complete the **Objective and Competency Sections** by clicking on each Objective/Competency title to open the associated rating window.

NOTE: You can also navigate through the objectives and competencies by clicking **Next**, **Prev**, or **Done** as you complete the rating.

- Click on the **check mark** next to the appropriate rating (note: the selection turns a green color. To deselect a rating click on it again). Comments can be entered and formatted. Click on **Next**.

NOTE: The system **automatically saves** content as it is entered. If the need arises to logout mid-rating, the rating content that was entered will still be available the next time the rating form is accessed using the steps above.

4. **Writing Assistants** are available for **competencies** only. Writing Assistants contain the Behaviorally-Anchored Rating Scales (BARS) for the competency and provide examples of behaviors that can be used to determine the appropriate rating.

The screenshot shows the 'Competency Section' interface for 'Adaptability (200)'. The overall rating is 'Not Available'. The rating scale has three options: 'Needs Improvement', 'Meets Expectations', and 'High Performing', all currently unselected. The 'COMMENTS' section is empty. On the right, the 'Writing Assistant' is expanded, showing 'NEEDS IMPROVEMENT' and 'MEETS EXPECTATIONS' categories with detailed behavioral descriptions. A 'Click to collapse section' tooltip is visible over the 'Journal Entries' section.

5. Once the BARS statements have been entered into the rating, they can be edited and formatted.
6. Previously entered **Journal Entries** and/or **Check-In Entries** are also available within the rating card to use in the comments section of objectives and competencies.
7. An **Overall** rating is required for the evaluation (plan). To complete the **Overall Rating**, click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click it again). Comments can be entered and formatted. Click on **Done** when finished.

The screenshot shows the 'Evaluation Overall Section' interface for 'Overall Rating'. The overall rating is 'Meets Expectations'. The rating scale has three options: 'Needs Improvement', 'Meets Expectations' (selected with a green checkmark), and 'High Performing'. The 'COMMENTS' section contains the text: 'Adding a journal entry and tagging a competency. Overall rating text goes here!'. On the right, the 'Journal Entries' section is expanded, showing a list of entries with dates and authors, and an 'Add to Comment Box' button for each entry.

8. As previously mentioned, the system automatically saves the work.
9. Review the Summary page. Click **Submit Evaluation** when done with the rating. Click **Print Current State** if you would like to maintain a hard copy.

NOTE: Once the Submit Evaluation is selected, and certifications are done, the rating is considered to be complete, and the evaluation moves to the next step in the evaluation process. It may be beneficial to discuss a rating with the employee prior to submitting the rating so that changes can be made if necessary.

10. If **Submit Evaluation** is selected, the system will provide a certification statement for review. If changes are necessary, click **Cancel**. If changes are not necessary, click **Continue**.

11. After selecting **Continue**, a confirmation will appear indicating the rating has been submitted. The review/rating is now complete.

12. Please note that the system has a language checker in it, and if you try and submit a rating that contains inappropriate language, the system will alert you and provide you with an opportunity to make changes before certifying and submitting.

COMPETENCY SECTION
COMPETENCIES

Overall Rating Meets Expectations

Adaptability (200)
Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements or cultures.

RATING SCALE

- Needs Improvement
- Meets Expectations**
- High Performing

COMMENTS

Showing that the language checker works.

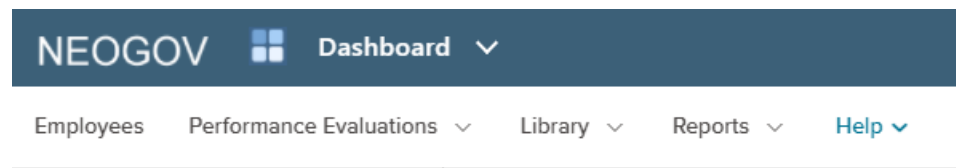
Press Alt + F10 to move to toolbar. Press ALT + 0 for Help.

Comment contains some inappropriate words.

Reviewer Entries: 2 entries
Journal Entries: 0 entries
Writing Assistant: 3 entries

13. **For Managers**, once finished with a rating there are two options to rate another employee:

Option 1: Click on **Dashboard** to return to your dashboard and follow the steps above.



Option 2: Click on **Employees** and search/select the employee to be rated, which takes you to their **Employee Details** screen.

NEOGO V Dashboard

Employees Performance Evaluations Library Reports Help

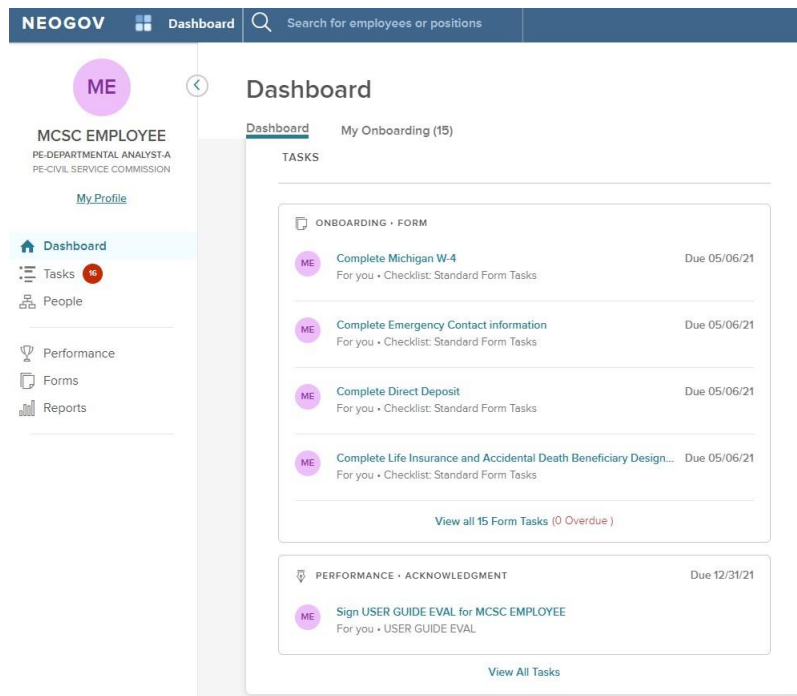
Employee List

Show All Employees Bulk Actions

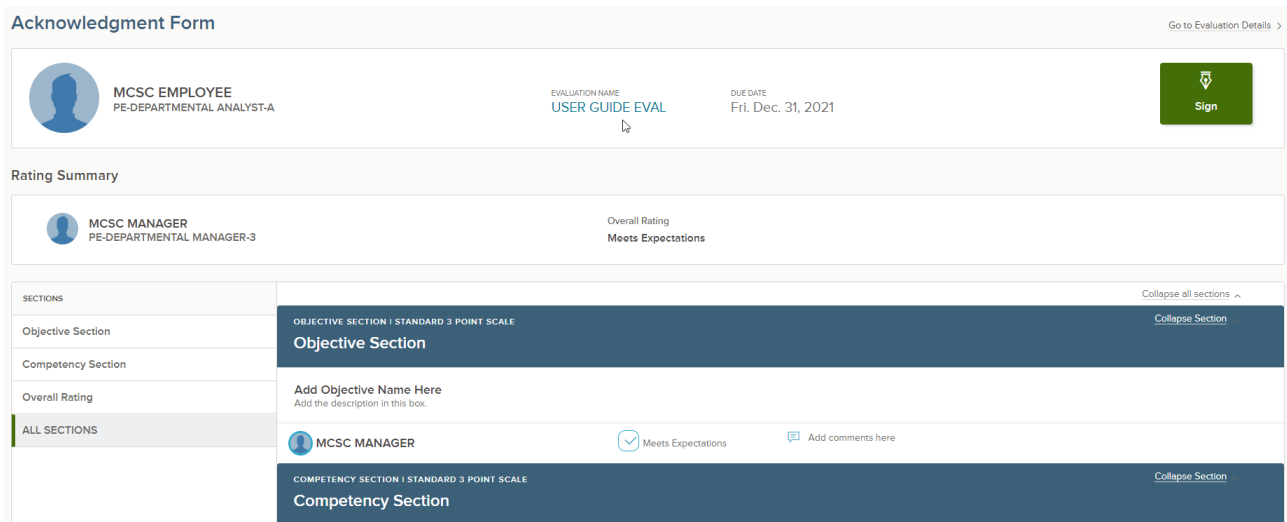
Photo	Employee #	Last Name	First Name	Direct Manager	Position	Position Start Dt	Online Access	Active	Actions
	11111112	EMPLOYEE	MCSC	MCSC MANAGER	PE-DEPARTMENTAL ANALYST-A	05/02/2021	Activated	Yes	
	11111113	MANAGER	MCSC	MCSC 2ND LINE MANAGER	PE-DEPARTMENTAL MANAGER-3	06/24/2004	Activated	Yes	

Acknowledgement of Rating

- When you log in, you will arrive at your **Dashboard**. Because you have a rating that is ready for signature you will see a signature task listed in the **Tasks** section. Click on the subject, **Sign** which will take you to the **Signature** window.



2. In the **Acknowledgment Form (After Ratings)** window, review the ratings assigned to each objective and competency in the performance evaluation (plan).
 - a. If questions or concerns need to be addressed before completing the acknowledgement task, return to your dashboard by clicking on NEOED or Dashboard. The task will remain active and in your Tasks section of the dashboard. If you do not acknowledge your evaluation (plan) rating, please follow up with your manager.
3. Click on the **Sign** button to open the signature pane.



- Enter any MSC comments and acknowledge the rating by clicking on **Submit**.

NOTE: Clicking on **Cancel** will return you to your dashboard without acknowledging the performance evaluation (plan) rating. If you do not acknowledge your performance evaluation (plan) rating, please follow up with your manager.

- The **Request for Signature** will no longer appear on your **Dashboard**.

Reports

The **Reports Dashboard** is available to the **Manager**. The reports provide the opportunity to monitor employees and evaluate specific items throughout the rating period.

- Log in and from the **Dashboard**, **Left Navigation menu**, select the **Reports** menu option.

NOTE: All the reports listed have the same general configuration and field choices; however, they are specific to the title listed. For the purposes of this document, I will select the **Task Status Report** to go over the fields and their functions.

- In the **Performance** box, select your report and then Scroll down to the section where you can select and arrange the fields you would like displayed on your custom report.
- Select the icon with four (column) lines on it to choose the columns to display.

<input type="checkbox"/>	Task Assignee(s)	Department	Department Code	Related to	Subject	Priority	Status	Due Date
<input type="checkbox"/>	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation: MDOT TRAINING	Rating For MCSC EMPLOYEE's MDOT TRAINING	Low	Completed	04/14/2022
<input type="checkbox"/>	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation: MDOT TRAINING	Sign MDOT TRAINING for MCSC EMPLOYEE	Low	Completed	04/14/2022
<input type="checkbox"/>	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation with Checkin	Rating For MCSC EMPLOYEE's Evaluation with Checkin	Low	Pending	01/31/2022
<input type="checkbox"/>	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation with Checkin	Sign Evaluation with Checkin for MCSC EMPLOYEE	Low	Pending	01/31/2022

- In the **Columns** fly out window, **select** the columns to display by clicking on the **name**. When a **green check mark** appears next to the column name, the column will display in the report. To **deselect** a column, click on the name. Use the **6 dots icon** to **drag and drop** the columns to the desired order/placement. When finished, click on **Done**.

- Use the **Filter** icon (next to the columns icon) to add any applicable filters to the report.

6. On the **Filters** screen, click on **Add a Filter**.

The screenshot shows the NEOGOV dashboard with a table of task assignments. The table has columns for Task Assignee(s), Department, Department Code, Related to, and Subject. The 'Filters' sidebar is open on the right, showing a list of filterable fields including Task Assignee(s), Department, Department Code, Related to, Subject, Priority, Status, Due Date, Bargaining Unit, and Class Spec. The 'Add a Filter...' button is highlighted at the top of the sidebar.

7. Select the item to **Filter** on. Then add the **Operation** to take place and any **Specific Criteria**. Click on **Apply Filter**. If additional filters are desired, repeat the steps. When all filters are in place, click on **Done**.

The screenshot shows the 'Filters' dialog box. It has a 'Done' button at the top right. Below it is an 'Add a Filter...' button. A message '* Fields are required.' is displayed. Below the message is a 'Clear All' button with an 'x' icon. The filter configuration shows 'Due Date' selected in a dropdown, followed by 'is...' in another dropdown, and '12/31/2021' in a text input field. An 'Apply Filter' button is highlighted in green at the bottom.

8. The search icon can also be used to filter by typing the criteria into the search box.

The screenshot shows the NEOGOV dashboard with a table of task assignments. The table has columns for Task Assignee(s), Department, Department Code, Related to, Subject, Priority, Status, and Due Date. A search icon is visible in the top right corner of the dashboard.

9. When the report criteria are set you can **export** your report to PDF, Excel, or CSV format by selecting the records you'd like to export and clicking on **Bulk Actions**. Choose the **Export** option and click on **Done**.

The screenshot shows the NEOGOV dashboard with a report view. The report table contains the following data:

Task Assignee(s)	Department	Department Code	Related to	Subject	Priority
MCSM MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation	MDOT TRAINING	Rating For MCSM EMPLOYEE's MDOT TRAIL... Low
MCSM EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation	MDOT TRAINING	Sign MDOT TRAINING for MCSM EMPLOYEE Low
MCSM MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation	Evaluation with Checkin	Rating For MCSM EMPLOYEE's Evaluation wi... Low

The 'Actions' sidebar on the right includes a 'Skip to Content' button and a 'Done' button. Under 'EXPORT ACTIONS', there are three options: 'Export to PDF', 'Export to Excel', and 'Export to CSV', each with a corresponding icon.

10. The ability to create a **custom view** within the report is available to users. To create a custom view, click on **Default**. In the Custom Views slide out window, click on **Create New View**.

The screenshot shows the NEOGOV dashboard with the 'Custom Views' sidebar open. The sidebar has a 'Skip to Content' button and a 'Done' button. Below these is a 'Create New View' button. At the bottom, there are two view options: 'Default' (selected) and 'Default' (unselected).

11. Enter a **Name** for the view. The report can be made your default view by checking the associated **Make my default** checkbox. The ability to schedule an **auto-export** of the report is available by selecting **Schedule Export** and completing the required fields.

Custom Views
Cancel Save

* Fields are required.

Name *

Make my default

SCHEDULE EXPORT

Send to *

MCSM EMPLOYEE

Report type

Frequency

Repeat every *
 Day(s)

Send report starting on

End sending report on

12. Click on **Save**.

13. To return to your **Dashboard** click on **Dashboard**.