

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

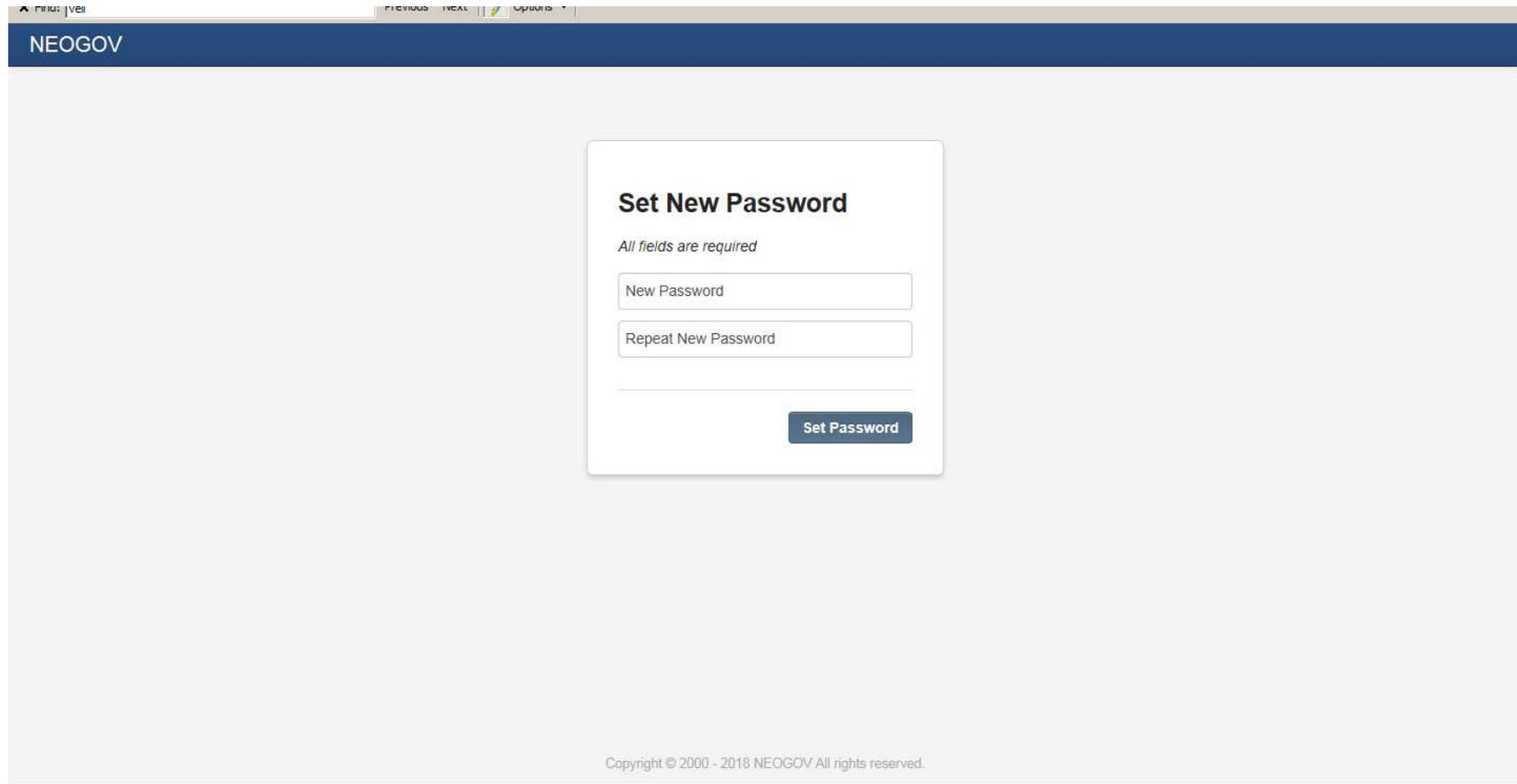
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NEGOV-PE Evaluator and Department Head Dashboard Instructions

Activation

You will receive an email with instructions to log into NEGOV to set a new password which must be completed within 24 hours of receipt. If you do not set up a password within 24 hours or you forget your username or password, please contact the HR department for a reset. (Donna Wolk – 515-993-9920)



The screenshot shows a web browser window with the NEGOV logo in the top left corner. The main content area features a white box with the title "Set New Password". Below the title, it states "All fields are required". There are two input fields: "New Password" and "Repeat New Password". A blue "Set Password" button is located at the bottom right of the form. At the bottom of the page, there is a copyright notice: "Copyright © 2000 - 2018 NEGOV All rights reserved."

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Logging in

Go to <https://login.neogov.com/> using either chrome or internet explorer.

The screenshot shows a web browser window with the URL <https://login.neogov.com/SignIn?siteCode=IN&>. The browser tabs include "Employee Testing, P...", "Worker's Comp Ass...", "NPELRA", "Worker's Comp UNI...", "NEOGOV", "Background Checks", "ITA | OSHA", "E-Verify: Login", and "Microsoft Word - 20...".

The main content area is split into two columns. The left column contains the login form:

- NEOGOV** logo
- Username field:
- Password field:
- Text: *All fields are required*
- Log In** button
- Links: [Login using Azure](#), [Forgot username?](#), [Forgot your password?](#)
- Copyright © 2000 - 2018 NEOGOV All rights reserved.

The right column features a large banner for the **2018 NEOGOV CONFERENCE** held from **OCTOBER 10 - 12** in **LAS VEGAS**. The banner includes a "REGISTER NOW" button. Below the banner is a section titled "Connect & Learn With the NEOGOV Community".

This section contains a testimonial from Karen Thomas, City of Olathe, who states: "NEOGOV staff not only explained how to do something but demonstrated it in the system. I learned so much and I'm ready to use it." A "LEARN MORE" button is provided below the quote.

To the right of the testimonial is a large graphic showing a **9/10** rating for the **2017 CONFERENCE RATING**.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Evaluation Dashboard (Landing Page)

If you have access to both modules of NEOGOV you will need to click on “OHC” (Online Hiring Center) then click on “PE” (Perform). Once into the PE module, you will be automatically directed to your dashboard view.

The screenshot shows the NEOGOV PE Perform dashboard. At the top, there is a navigation bar with the NEOGOV logo, a 'Perform' dropdown, and a link to switch from OHC to Perform. Below this is a search bar and user information for Erin Freeman. The main content area is titled 'My Tasks' and features a summary row with six task categories: Total (2), Rating (2), Approve And Sign (0), Sign (0), Approve (0), and Other (0). A 'Not Used' callout points to the 'Other' category. Below the summary row is a table with columns for Task, For Employee, Related To, and Due Date. Two tasks are listed: 'Rating For Donna Wolk's AnnualPerformance - General 2018(due06/2019)' and 'Rating For Leslie Cox's AnnualPerformance - General 2018(due06/2021)'. A 'Total number of tasks you have assigned' callout points to the 'Total' and 'Rating' counts. A 'DEPARTMENT HEAD ONLY' callout points to the 'Approve And Sign', 'Sign', and 'Approve' categories. An 'EVALUATOR ONLY' callout points to the 'Rating' category. At the bottom, there is a 'My Evaluations' section with a message: 'Looks like you don't have any evaluations'.

| Task | For Employee | Related To | Due Date |
|--|--------------|--|------------|
| ★ Rating For Donna Wolk's AnnualPerformance - General 2018(due06/2019) | Donna Wolk | AnnualPerformance - General 2018(due06/... | 04/01/2019 |
| ★ Rating For Leslie Cox's AnnualPerformance - General 2018(due06/2021) | Leslie Cox | AnnualPerformance - General 2018(due06/... | 04/01/2019 |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Goal Dashboard **New**

From the dashboard, you can create goals, approve goals, update progress on existing goals, or edit goals year round.

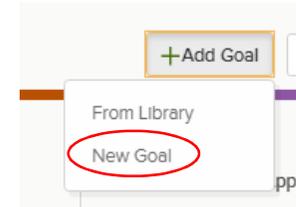
The screenshot displays the NEOGOV PE Goal Dashboard. The navigation bar includes 'NEOGOV PE Perform' and a search bar. The main navigation menu lists 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Reports', and 'Help'. The 'Goal Dashboard' tab is highlighted and circled in red. Below the navigation, the 'My Goal Tasks' section is visible, with a 'view all' link. The dashboard features six summary cards: '3 Total Goals', '2 Goals On Time', '0 Goals Overdue', '1 Goals Completed', '0 Pending My Approvals', and '0 Pending Others Approvals'. A '+Add Goal' button is located in the top right of the goal tasks section. Below the summary cards is a table with columns for 'Goal Name', 'Progress', 'Due Date', and 'Actions'. The table contains three rows of goal tasks. Red annotations include: 'Click here to add a new goal →' pointing to the '+Add Goal' button; 'Click here to edit goal →' pointing to the edit icon in the 'Actions' column of the first row; and '← Click here to open goal to update progress' pointing to the progress bar of the first row. The bottom right corner of the table shows '1 - 3 of 3 Items'.

| Goal Name | Progress | Due Date | Actions |
|--|----------|------------|--|
| Be receptive to changes that can improve services | 100% | 06/30/2018 | Click here to edit goal → |
| Commitment to continuous learning and staying abreast in our field | 0% | | ← Click here to open goal to update progress |
| Testing Goal | 0% | | |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Adding Goals

When adding a goal, always select new goal. Fill out goal name, goal due date (optional), category, and assign goal to appropriate employee. You can also add a description. Hit save if you are done. You can also add milestones prior to hitting save. See next page.



- * Once you add a goal, you cannot delete it, only manage it
- * Employees can only assign goals to themselves
- * Managers can assign goals to themselves and their employees

A screenshot of the 'Add Goal' form. At the top right, a red box contains the text: '* All required field have to be completed to be able to hit save'. Below this, the form has tabs for 'General', 'Milestones', and 'Alignment'. The 'General' tab is active. The form includes a message '* Fields are required.' and several input fields: 'Goal Name *' (text box), 'Goal Type *' (dropdown menu with 'Employee Goal' selected), 'Goal Due Date' (calendar icon and 'select date (MM/DD/YYYY)' text), 'Category *' (dropdown menu with 'Select one' selected), and 'Assignee *' (text box with 'Search employee' and a 'Myself' link). There is also a 'Description' text area and a checkbox for 'Add to Goal Library'. 'Cancel' and 'Save' buttons are at the top right.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Adding Milestones

You can add milestones if you'd like. Milestones are mini-goals that relate back to the main goal. These are helpful in tracking progress. Once you are done, hit save, or you can click on alignment. See page 9 for information on updating progress.

To add a new milestone, start by clicking Add New Milestone.

Edit Goal Cancel Save

General **Milestones** Alignment

Use weights ⓘ

| | |
|---|---|
| DUE: 12/15/2018 Creating testing environment |   |
| DUE: 12/31/2018 Create interview template. |   |
|  Add New Milestone | |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Adding Milestones Continued

After clicking “Add New Milestone” a new box will appear where you can enter the name of the milestone, the due date (optional) and whether to use overdue/reminder settings. Click save once complete.

Using weights is a simple way of updating overall goal progress. Each time a milestone is marked as complete, the goal progress is updated accordingly. This allows for more precise progress updates, but if weights are used, then the goal progress CANNOT be updated manually. This means that in order to update goal progress, you must mark milestones as complete.

Use weights ⓘ

DUE: 12/15/2018
Creating testing environment

DUE: 12/31/2018
Create interview template.

* Fields are required.

Name *

| Type milestone name here.

Due Date

select date (MM/DD/YYYY) Add due date (optional)

Use Overdue/Reminder Settings:

Yes No

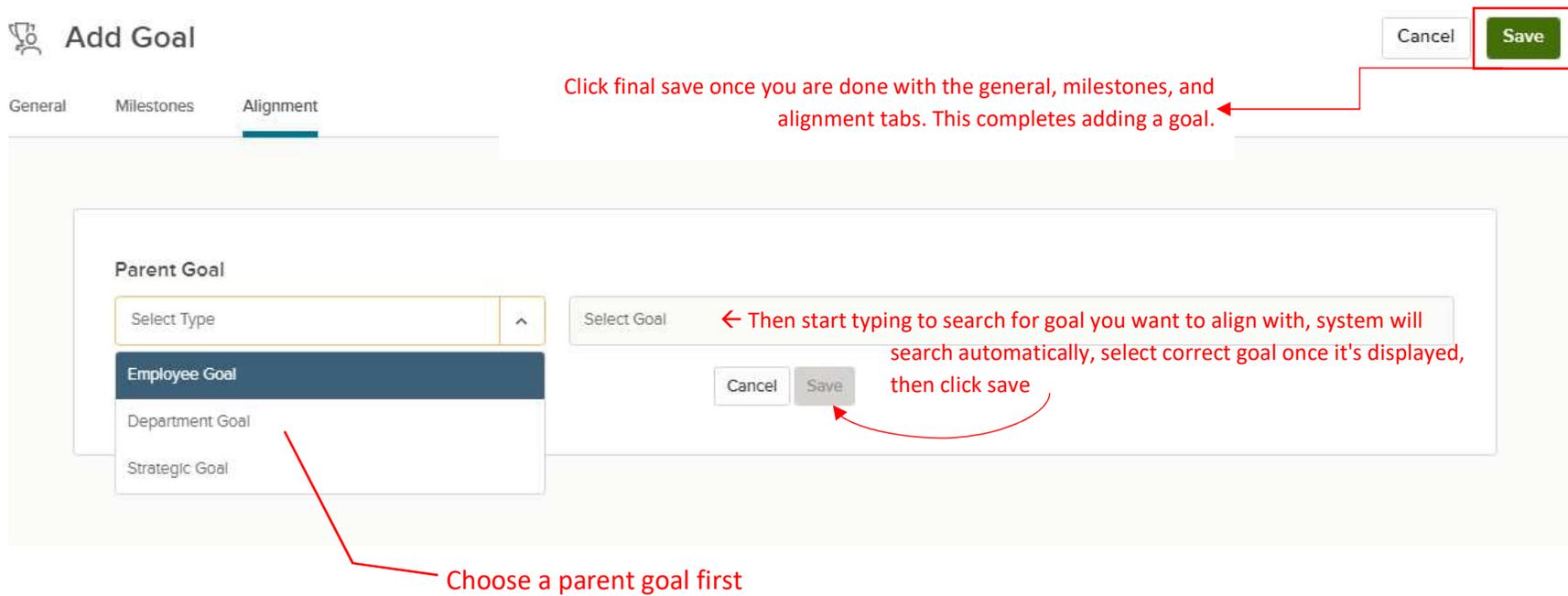
Cancel Save ← Hit save when done

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Adding Goal Alignment

Goal Alignment allows you to align the goal that you are creating with the 'big picture'. You can make the goal you are adding a child of an employee, department, or strategic goal.

* System only allows HR Admin to add department or strategic goals, so send these in early if you want to use them in the next evaluation



Add Goal

General Milestones **Alignment**

Parent Goal

Select Type
Employee Goal
Department Goal
Strategic Goal

Select Goal
Cancel Save

← Then start typing to search for goal you want to align with, system will search automatically, select correct goal once it's displayed, then click save

Choose a parent goal first

Click final save once you are done with the general, milestones, and alignment tabs. This completes adding a goal.

Cancel Save

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Updating Goal Progress

To update goal progress if not using milestones, click on the progress bar **84%**  This will open a fly-out that allows you to slide the progress bar left or right. You can also edit the percentage with the up and down errors. Add comments as needed, and hit submit updates. This is an optional process.



DONNA WOLKE | STRATEGIC PLAN

Be receptive to changes that can improve services

Due: Jun 30, 2018

Edit Goal

Cancel

Submit Updates

Goal Progress

Print



The screenshot shows a fly-out window for updating goal progress. At the top, there is a green progress bar with a slider handle. The current percentage is displayed as 87. Below the progress bar is a comment section with a rich text editor. The comment section includes a toolbar with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, and a dropdown menu. The text area contains the placeholder text "Comments.".

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Goal Approval

When an employee creates a goal, it will need approved by the employee's manager. When the manager opens the Goal Dashboard, there will be a number in the "Pending My Approval" box if there are any goals that need approved. Click on this number to open the approve or deny box.

The screenshot displays the NEOGOV PE Perform dashboard. The top navigation bar includes the NEOGOV logo, a 'PE Perform' dropdown, a search bar, and user information for Erin Freeman. Below the navigation bar, there are tabs for 'Evaluation Dashboard' and 'Goal Dashboard'. The main content area is titled 'My Goal Tasks' and features a row of six summary cards: 'Total Goals' (0), 'Goals On Time' (0), 'Goals Overdue' (0), 'Goals Completed' (0), 'Pending My Approvals' (1), and 'Pending Others Approvals' (0). A red arrow points to the '1' in the 'Pending My Approvals' card. Below the cards is a filter bar with search fields for 'Goal Name', 'Progress', and 'Due Date', along with an 'Actions' button.

| Category | Count |
|--------------------------|-------|
| Total Goals | 0 |
| Goals On Time | 0 |
| Goals Overdue | 0 |
| Goals Completed | 0 |
| Pending My Approvals | 1 |
| Pending Others Approvals | 0 |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Goal Approval Continued

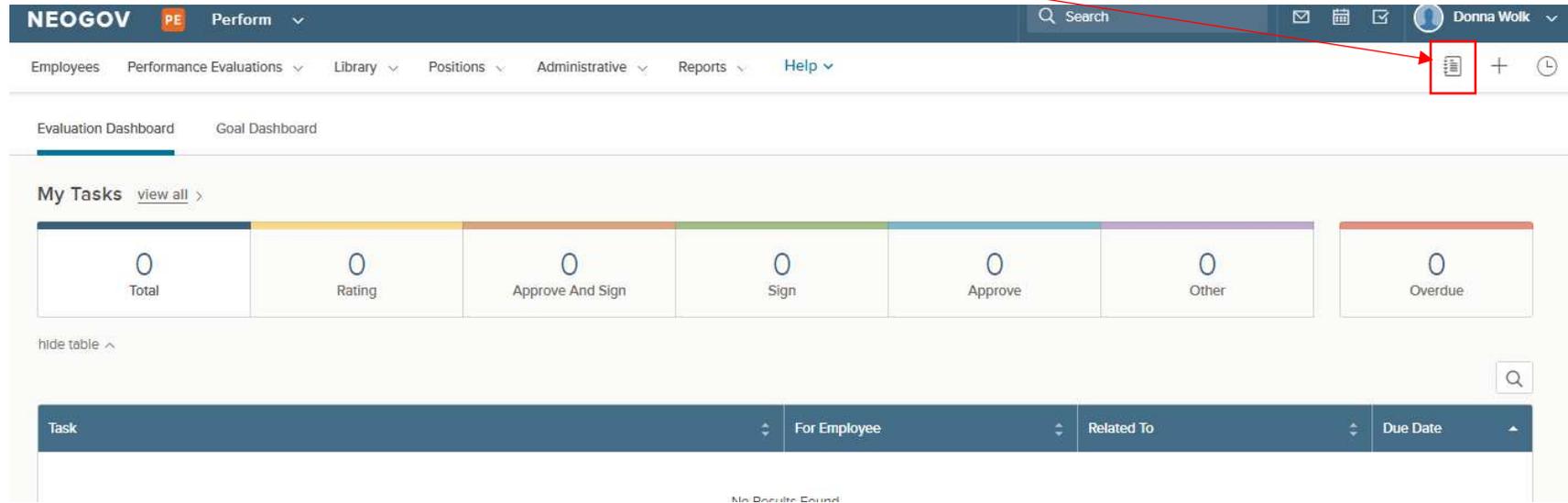
This fly-out will appear, allowing you to view the goal activity feed which shows all the actions taken on the goal, or approve or deny goal. You can add comments if you'd like. When you are done, hit submit updates.

The screenshot shows the NEOGOV-PE interface for a 'Testing Goal'. The header includes the NEOGOV logo and 'PE' indicator. The user is logged in as 'DONNA WOLK | TESTING ENVIRONMENT'. The main title is 'Testing Goal'. There are two tabs: 'Goal Approval' (active) and 'Goal Activity Feed'. A notification bar at the top states 'Goal IS PENDING APPROVAL FOR CREATION'. On the right, there are buttons for 'Approve Goal', 'Deny Goal', 'Cancel', and 'Submit Updates'. A comment box is visible with the text 'Approved.' and a toolbar with formatting options (B, I, U, list, link, etc.). The sidebar on the left shows 'My Goal Tasks' with a count of 0 Total Goals and a search bar for 'Goal Name'. Below that, there is a 'Testing Goal' entry and a 'Current Goal Prog' section with 'My Direct Reports'.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Journal Entries **New**

1. Click on journal entry button



NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Adding Journal Entries

2. After hitting the journal entry button, this fly-out will appear across your screen.

The screenshot shows the 'Journal Entries Hub' interface. At the top right is a 'Close' button. Below the title are tabs for 'Current' and 'Pending'. A red asterisk indicates a required field. The main form has a search box for 'Who is this entry about?' containing 'donna wj'. A dropdown menu shows 'Donna Work' selected. Below the search box is a rich text editor with a toolbar (bold, italic, underline, bulleted list, numbered list, link) and a paperclip icon. A text area contains '@intel'. A dropdown menu is open below '@intel', showing a table of items and evaluations. A red arrow points to the paperclip icon with the text 'You can attach supporting documents such as thank you letters'. Another red arrow points to the dropdown menu with the text 'Add any necessary comments. You can use the @ sign if you want to tag Competencies, Goals and Narratives. For example, to tag the word integrity, start typing @inte and you will see key words populate. Select the one you wish to use.' At the bottom right, there is a green 'Save' button and a red arrow pointing to it with the text 'Hit save once complete'.

Journal Entries Hub Close

Current Pending

* marks a required field

Who is this entry about? *

donna wj ← Start typing name, then select once highlighted

Donna Work

B I U [List Icons] [Link Icon] ← You can attach supporting documents such as thank you letters

@intel

| Item | Evaluation |
|-----------------------------|---|
| <u>Integrity</u> | AnnualPerformance - General 2018(due06/2019) |
| <u>Interpersonal Skills</u> | AnnualPerformance - General 2018(due06/2019) |

← Add any necessary comments. You can use the @ sign if you want to tag Competencies, Goals and Narratives. For example, to tag the word integrity, start typing @inte and you will see key words populate. Select the one you wish to use.

Hit save once complete → Save

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

After hitting save, the journal entry you just created will appear at the bottom of the fly-out

The screenshot displays a dashboard interface with the following elements:

- Top Bar:** A dropdown menu set to "Current" with "2 entries" next to it. A red circle highlights this area with the text "← You can toggle between archived and current". To the right are "Select All", "Actions", and a filter icon.
- Journal Entry 1:** A card for Donna Wolk, last edited 07/19/18 11:21:27 AM, titled "Example JE.". A red arrow points to the right with the text "Here you can share the JE with pertinent parties →".
- Journal Entry 2:** A card for Donna Wolk, last edited 06/25/18 10:22:53 AM, titled "Learning NEOGOV", with a "shared" status icon.
- Actions Menu:** A red circle highlights the "Actions" dropdown menu, which is open and shows the following options: "Archive" (highlighted with a yellow box), "Delete", "Print With Attachments", and "Print Without Attachments".

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Sharing Journal Entries

3. To share journal entry, click on the share button

The screenshot shows a dashboard interface for journal entries. At the top, there is a navigation bar with a 'Current' dropdown, a '2 entries' indicator, and buttons for 'Select All', 'Actions', and a filter icon. Below this, a journal entry is displayed with a checkbox, a profile picture of Donna Wolk, the name 'Donna Wolk', and the text 'Testing journal entries.' To the right of the entry are icons for share, trash, and edit. A red arrow points from the instruction 'click on the share button' to the share icon. A search dropdown menu is open, titled 'ENTRY SHARED WITH', with a search input field containing 'erin fr' and a search icon. Below the input field, the name 'Erin Freeman' is highlighted in a dark blue box. Red text with arrows points to the search input and the highlighted name.

Start typing name here →

And select once highlighted →

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Evaluator Process

Rating an Employee Evaluation



If you want to be able to pull goals from the dashboard into the evaluation, you must finish adding and updating them in the dashboard before you begin the evaluation

From the dashboard click on the evaluation you want to begin from the task section.

Since the employee has completed their self-eval, you will see the eval has now moved onto the evaluator's rating part of the workflow.

| Task | For Employee | Related To | Due Date |
|--|--------------|--|------------|
| ★ Rating For Donna Wolk's AnnualPerformance - General 2018(due06/2019) | Donna Wolk | AnnualPerformance - General 2018(due06/... | 04/01/2019 |
| ★ Rating For Leslie Cox's AnnualPerformance - General 2018(due06/2021) | Leslie Cox | AnnualPerformance - General 2018(due06/... | 04/01/2019 |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Current Goals

Once in the evaluation, you will need to pull current goals for your employee from the dashboard. Click “add items” to pull more goals in from the goal dashboard.

The screenshot displays the NEOGOV-PE Evaluator and Department Head Dashboard. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and user information for Donna Wolk. The main content area is titled 'AnnualPerformance - General 2018(due06/2019)' for Donna Wolk, with a due date of 'Sat, Jun 1, 2019'. Below this, there is an 'Add Items' section with a 'Complete Task' button. The 'Current Goals' section is highlighted with a red box, and a red arrow points to the '+ Add Items' button. The 'Current Goals' section contains a table with the following data:

| Items | Description | Progress | Actions |
|--------------|-------------|----------|---------|
| Testing Goal | | 0% | |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Selecting Goals

Click on “select from employee goals” to pick and choose which ones goals to pull over, then choose.

AnnualPerformance - General 2018(due06/2019) DUE DATE
Donna Wolk Sat, Jun 1, 2019 [go to evaluation detail page >](#)

Add Items Complete Task

GOAL SECTION | TEXT ONLY ⓘ
Current Goals

| Items | Description | Progress |
|----------------|-------------|----------|
| ⋮ Testing Goal | | |

+ Add Items

- Select From Employee Goals ★
- From Position
- From Class Specification
- From Development Plan
- From Last Scheduled Evaluation
- From Employee Goals
- New Goal

These options are not active in our system

FEEDBACK & HELP

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Completing Current Goals

Once you have pulled in all the goals you need, click Complete Task

Annual Performance - General 2018(due06/2019)
Donna Wolk

DUE DATE
Sat, Jun 1, 2019

[go to evaluation detail page >](#)

Add Items **Complete Task**

GOAL SECTION | TEXT ONLY ⓘ

[+ Add Items](#)

Current Goals

| Items | Description | Progress | Actions |
|-----------------------|-------------|---|-------------------------------------|
| ⋮ Testing Goal | | 0% <div style="width: 100%; height: 10px; background-color: #ccc;"></div> | ✎ |
| ⋮ Goal from Dashboard | | 0% <div style="width: 100%; height: 10px; background-color: #ccc;"></div> | ✎ ✕ |

& HELP

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

This is the fly-out that appears after you click Complete Task. You can add comments by typing them in or add journal entries. Click next to switch between goals or done once complete.

* Comments added to the goals here do not transfer to the Goal Dashboard, they are a part of this evaluation only

The screenshot displays the 'GOAL SECTION Current Goals' interface. At the top, there is a dark blue header with a trophy icon, the text 'GOAL SECTION Current Goals', and navigation buttons: 'Done', '< Prev', and 'To Overall >'. Below the header, the 'Total Score 3.50' is shown. The main content area is divided into two sections. On the left, under 'ITEM WEIGHT: 100%', is the 'Goal from Dashboard' section. It features a 'COMMENTS' header with a list icon, a rich text editor toolbar (with Bold, Italic, Underline, Bulleted List, Numbered List, Link, and ABC- icons), and a large text input area labeled 'Comments'. On the right is the 'Journal Entries' sidebar, which includes a search bar and a list of four entries. The first two entries are by ERIN FREEMAN on WED AUG 01, 2018. The third entry is by DONNA WOLK on THU JUL 19, 2018, with the text 'Testing journal entries.' and an 'Add to Comment Box' button. The fourth entry is by DONNA WOLK on MON JUN 25, 2018, with the text 'Learning NEOGOV'. A red box highlights the 'Add to Comment Box' button for the third entry, and a red arrow points from a text box below to this button. The text box contains the instruction: 'Click here to auto-populate journal entries into comment box'.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Agency Wide Competencies

The next task will be to rate the Agency Wide Competencies. Start by clicking on the first competency on the list.

The screenshot displays the NEOGOV-PE Evaluator and Department Head Dashboard. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and user information for Erin Freeman. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Reports', and 'Help'. The main content area is titled 'AnnualPerformance - General 2018(due06/2019)' and shows a 'Total Score 0.00' and a 'Submit Evaluation' button. On the left, a sidebar identifies the user as Donna Wolk, Human Resource Coordinator, and lists sections: 'Agency Wide Competencies', 'Current Goals', 'Future Goals', 'Overall Rating', and 'Summary'. The main content area displays a 'COMPETENCY SECTION | 5-POINT SCALE | SECTION WEIGHT 100.00 %' and lists several competencies: 'Interpersonal Skills', 'integrity', 'Initiative', 'Professionalism', and 'Dependability & Reliability'. Each competency has a 'no comment' icon and a 'WEIGHT' value. A red arrow points to the 'Interpersonal Skills' competency.

| Competency | Weight |
|-----------------------------|--------|
| Interpersonal Skills | 8.34% |
| integrity | 8.34% |
| Initiative | 8.34% |
| Professionalism | 8.34% |
| Dependability & Reliability | 8.33% |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Rating Competencies

Click on a number rating then enter comments. Substantive comments are required for any rating other than a three. Click “Next” to move to the next competency.

The screenshot displays the 'COMPETENCY SECTION Agency Wide Competencies' dashboard. At the top right, there are 'Done' and 'Next >' buttons. The main area shows 'Total Score 3.50' and 'ITEM WEIGHT: 8.34%' for the 'Interpersonal Skills' competency. On the left, a 'RATING SCALE' is shown with five options: 1 (Does not meet requirements), 2 (Partially Meets Requirements/ Needs Improvement), 3 (Meets Requirements), 4 (Exceeds Requirements), and 5 (Significantly Exceeds). The '3' option is selected. In the center, there is a 'COMMENTS' section with a rich text editor containing bold (B), italic (I), underline (U), bulleted list, numbered list, link, and ABC icons. On the right, a sidebar shows 'Journal Entries' (4 entries) and 'Reviewer Entries' (1 entry). The 'Reviewer Entries' section is expanded, showing a self-rating by 'Donna Wolk' with a rating of 4 (Exceeds Requirements) and a 'Comments' field. A red text box explains that clicking the down arrow for 'Journal Entries' expands it to allow for journal entries.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Viewing Rating Scale

Tip -> If you need a reminder of what each rating represents, click on “Show descriptions” and a fly-out will appear.

The screenshot displays the 'Agency Wide Competencies' section for 'Interpersonal Skills'. The total score is 0.00. The item weight is 8.34%. The rating scale is currently empty, with a red box around the text '* Rating is required'. The 'COMMENTS' section is also empty. A 'Show descriptions' link is visible. The rating scale options are:

- 5 Significantly Exceeds
- 4 Exceeds Requirements:
- 3 Meets Requirements:
- 2 Partially Meets Requirements/ Needs Improvement:
- 1 Does not meet requirements

The 'Rating Scale' fly-out on the right provides detailed descriptions for each rating level:

- 5 Significantly Exceeds**
Has performance that consistently exceeds expectations. Accomplishments are superior to the standards for the position and sustained over the review period. Acts as a role model by consciously and positively influencing others.
- 4 Exceeds Requirements:**
Exhibits excellence in several areas, while being fully successful. A very good employee who strives for excellence and has extremely rare breakdowns in performance. Contributes to department and company success beyond requirements.
- 3 Meets Requirements:**
Has solid performance which clearly meets all standards and expectations on a regular basis. Performance is effective in both achieving results and in demonstrating a competent skill level.
- 2 Partially Meets Requirements/ Needs Improvement:**
Has performance which meets standards and expectations in some areas, but does not in others. Continues to need development in key areas.
- 1 Does not meet requirements**
Has performance which needs improvement immediately. Performance consistently does not meet standards and expectations and would indicate that the employee does not have the ability to do the job.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Submitting Evaluation

Once the evaluations are completed, hit the “submit evaluation” button.

The screenshot displays the NEOGOV-PE Evaluator and Department Head Dashboard. The top navigation bar includes the NEOGOV logo, a 'PE Perform' dropdown, a search bar, and user information for Erin Freeman. Below the navigation bar, there are tabs for Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. A red arrow points from the text 'hit the “submit evaluation” button.' to a green 'Submit Evaluation' button located in the top right corner of the main content area. The main content area shows the evaluation details for Donna Wolk, Human Resource Coordinator, for the 'AnnualPerformance - General 2018(due06/2019)'. The total score is 3.50. The evaluation is divided into sections, with 'Agency Wide Competencies' selected. The 'Agency Wide Competencies' section includes 'Interpersonal Skills' and 'integrity', both with a weight of 8.34%. The 'Interpersonal Skills' section shows a score of 3, indicating it 'Meets Requirements', with a 'no comment' icon.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Click continue to sign and complete evaluation.

The screenshot displays the NEOGOV-PE Evaluator and Department Head Dashboard. The interface includes a top navigation bar with the NEOGOV logo, a search bar, and user information for Erin Freeman. Below the navigation bar, there are tabs for Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. The main content area shows a performance evaluation for Donna Wolk, Human Resource Coordinator, titled "AnnualPerformance - General 2018(due06/2019)". The evaluation is currently at the "Agency Wide Competencies" section. A confirmation dialog box is overlaid on the screen, titled "You're almost done!". The dialog box contains the following text: "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." Below the text is a signature of Erin Freeman. At the bottom of the dialog box are two buttons: "Cancel" and "Continue".

NEOGOV PE Perform

Search Erin Freeman

Employees Performance Evaluations Library Positions Administrative Reports Help

< back to evaluation detail page Total Score 3.50 Submit Evaluation

Donna Wolk
HUMAN RESOURCE COORDINATOR

AnnualPerformance - General 2018(due06/2019)

COMPETENCY SECTION | 5 POINT SCALE | SECTION WEIGHT 100.00 %

Agency Wide Competencies

Interpersonals
3 Meets Re WEIGHT 8.34%

Integrity
3 Meets Re WEIGHT 8.34%

Initiative WEIGHT

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.

Erin Freeman

Cancel Continue

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Department Head Process

The Approval and Signature Process

Follow the instructions on page 4 to log in. From the dashboard click on the evaluation you want to approve from the Task section.

The screenshot shows the NEOGOV PE Evaluator and Department Head Dashboard. The dashboard is titled "My Dashboard - Internet Explorer" and displays the URL "https://performance.neogov.com/dashboard". The user is logged in as Erin Freeman. The dashboard features a navigation menu with options like "Employees", "Performance Evaluations", "Library", "Positions", "Administrative", "Reports", and "Help". The "My Tasks" section is highlighted, showing a table of tasks. A red box highlights the "Approve And Sign" task, and a red arrow points to it from the text above. A red text box explains that the task is highlighted because the first level evaluator has completed their review.

| Task | For Employee | Related To | Due Date |
|---|--------------|------------------------------|------------|
| ★ Rating For Leslie Cox's 2018 Performance Evaluation | Leslie Cox | 2018 Performance Evaluation | 04/15/2018 |
| 📄 Approve and Sign Test- Performance Evaluation for Zach Miller | Donna Wolk | Test- Performance Evaluation | 04/15/2018 |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Self-Rater/Rater Comparison

You can now review a side-by-side comparison of the employee self-evaluation and the manager evaluation.

The screenshot displays the NEOGOV-PE Evaluator and Department Head Dashboard. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and user profile information for Erin Freeman. Below the navigation bar, there are several menu items: Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. The main content area is titled 'Rating Summary' and features a 'Score' box showing 3.5. Below this, a table compares the total scores and weights for Donna Wolk (Human Resource Coordinator) and Erin Freeman (Director Human Resources). The table shows Donna Wolk with a total score of 3.17 and a weight of 0%, while Erin Freeman has a total score of 3.5 and a weight of 100%. Below the table, there are two tabs: 'Rating Details' (selected) and 'Rating Chart'. The 'Rating Details' tab shows a sidebar with 'SECTIONS' including Agency Wide Competencies, Current Goals, and ALL SECTIONS. The main content area under 'Rating Details' is titled 'Agency Wide Competencies' and shows a comparison of ratings for 'Interpersonal Skills'. Donna Wolk has a rating of 4 (Exceeds Requirements) and Erin Freeman has a rating of 3 (Meets Requirements). The item weight for this section is 8.34%. There are also 'Comments' icons next to each rating.

| Employee | Total Score | Weight |
|--|-------------|--------|
| Donna Wolk Human Resource Coordinator | 3.17 | 0 % |
| Erin Freeman Director Human Resources | 3.5 | 100 % |

| Competency Section | 5 Point Scale | Section Weight |
|--------------------------|---------------|----------------|
| Agency Wide Competencies | 5 | 100 % |

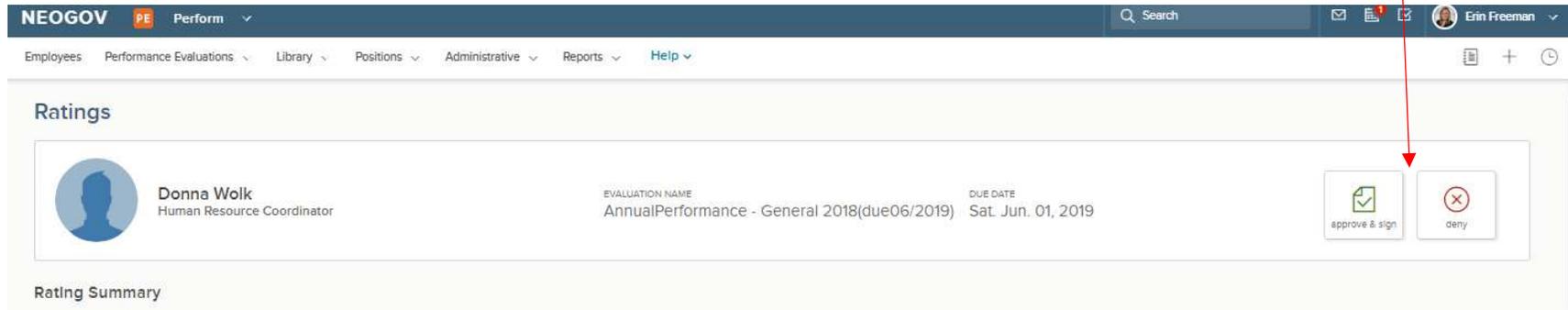
| Competency | Item Weight |
|----------------------|-------------|
| Interpersonal Skills | 8.34 % |

| Employee | Rating | Requirement Status |
|--------------|--------|----------------------|
| Donna Wolk | 4 | Exceeds Requirements |
| Erin Freeman | 3 | Meets Requirements |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

DH Approval

Once you have reviewed the employee's and evaluator's side by side comparison, click on either "Approve and Sign" or "Deny".



NEOGOV-PE Evaluator and Department Head Dashboard Instructions

A fly-out will appear where you can add your comments. Clicking on “Submit” will populate your electronic signature on the form and send it to the next step in the workflow process (HR Approval).

The screenshot displays the NEOGOV PE Evaluator and Department Head Dashboard. The main content area shows a ratings summary for Donna Wolk, Human Resource Coordinator. The evaluation name is 'AnnualPerformance - General 2018(due06/2019)' and the due date is 'Sat. Jun. 01, 2019'. The rating summary table shows a score of 3.58.

| Score |
|-------|
| 3.58 |

The 'Approve & Sign' fly-out is visible on the right side of the screen. It contains a 'Comments' section with a text area for writing a comment. Below the comments section is a signature area with the text 'Please sign your name below'. The signature area shows the name 'Erin Freeman' and the date 'July 30, 2018'. There are 'Auto-Generate' and 'Draw Signature' options at the bottom of the signature area. A red arrow points from the text in the first paragraph to the 'Submit' button in the fly-out.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Tips -> if you deny the evaluation, you will be able to enter comments before clicking "Save". At this point the evaluation is sent back to the original evaluator for them to edit and re-submit.

The screenshot displays the NEOGOV-PE interface. The main content area shows a 'Ratings' section for Donna Wolk, Human Resource Coordinator, with an evaluation name of 'AnnualPerformance - General 2018(due06/2019)' and a due date of 'Sat. Jun. 01, 2019'. Below this is a 'Rating Summary' table:

| | Score |
|--|---------------------|
| Donna Wolk Human Resource Coordinator | Total Score 3.5 |
| Erin Freeman Director Human Resources | Total Score 3.67 |

At the bottom of the main content area are buttons for 'Rating Details' and 'Rating Chart'. A 'Deny' modal is open on the right side, featuring a 'Cancel' button and a green 'Save' button. The modal contains a 'Comments' section with a text area where the word 'Deny' is entered. A red arrow points from the tip text to this text area.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Printing the Evaluation



Before you can print the evaluation in order to discuss it face-to-face with your employee, HR must first review the evaluation. Both the evaluator and department head will receive an email notification from NEOGOV-PE once HR has reviewed the evaluation - which should happen within 1-2 days from the time you submitted the evaluation.

From the evaluation dashboard click on Employees.

The screenshot displays the NEOGOV-PE dashboard interface. At the top, the navigation bar includes the NEOGOV logo, 'PE Perform', a search bar, and 'Human Resources'. Below this, the 'Employees' link in the 'Library' menu is highlighted with a red arrow. The main content area shows 'My Tasks' with a 'view all' link and seven task categories: Total, Rating, Approve And Sign, Sign, Approve, Other, and Overdue, each with a zero count. Below the categories is a table with columns for Task, For Employee, Related To, and Due Date. The table is empty, displaying 'No Results Found' and 'No items to display'. At the bottom, the 'My Evaluations' section shows a message: 'Looks like you don't have any evaluations'.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Click on the employee's last name.

The screenshot shows the NEOGOV Perform web application interface. The browser address bar displays the URL <https://performance.neogov.com/employeeList>. The page header includes the NEOGOV logo, a search bar, and the user profile for Erin Freeman. The main navigation menu contains links for Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. The 'Employee List' section features a table with columns for Photo, Employ, Last Name, First Name, Direct M, Position, Date, Status, and Yes. A red arrow points to the last name 'Walker' in the first row of the table. The footer of the page includes the NEOGOV logo and the copyright notice 'COPYRIGHT © 2010 - 2018'. A vertical 'FEEDBACK & HELP' button is located on the right side of the page.

| Photo | Employ | Last Name | First Name | Direct M | Position | Date | Status | Yes | Actions |
|-------|--------|-----------|------------|--------------|----------------------------|------------|-----------|-----|---------|
| | 1576 | Walker | Donna | Erin Freeman | Human Resource Coordinator | 04/23/2018 | Activated | Yes | |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Click on the evaluation you want to print from within the Evaluations section.

The screenshot displays the NEOGOV-PE system interface. At the top, the header includes the NEOGOV logo, a 'PE Perform' dropdown, a search bar, and user information for Erin Freeman. Below the header is a navigation menu with options like Employees, Performance Evaluations, Library, Positions, Administrative, Reports, and Help. The main content area is for Donna Wolk, Human Resource Coordinator, with tabs for Employee Details, Evaluations, Tasks, Development Plans, Goals, and Documents. The 'Employee Details' section is active, showing 'Employee Information' and 'Hierarchy'. The 'Employee Information' section contains a table with the following data:

| POSITION TITLE | DEPARTMENT | DIVISION |
|--------------------------------|-----------------|---------------|
| Human Resource Coordinator | Human Resources | |
| JOB DESCRIPTION | ACTIVE | ONLINE ACCESS |
| - | Yes | Activated |
| EMPLOYEE NUMBER | START DATE | |
| 1576 | 04/23/2018 | |
| EMAIL | PHONE NUMBER | ADDRESS |
| donna.wolk@dallascountyiowa... | - | - |

The 'Hierarchy' section shows a tree structure with 'You' (Director Human Resources) and 'Donna Wolk' (Human Resource Coord...). A 'View Company' link is also present.

The 'Evaluations' section is located below the employee details. It contains a table with one entry:

| AnnualPerformance - General 2018(due06/2019) | |
|--|-----------------------|
| Due: Sat. Jun 01, 2019 | Type: Periodic |
| Completed: - | Archived: No |
| Status: Rating | Actions: |

Buttons for 'Preview Timeline' and '+ Add Evaluation' are located to the right of the evaluations table. A vertical 'FEEDBACK & HELP' button is on the far right. A red arrow points from the instruction text to the evaluation entry in the table.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Click on Print Preview.

The screenshot shows the NEOGOV Performance Evaluation interface. The top navigation bar includes 'NEOGOV', 'Perform', a search bar, and user information for Erin Freeman. The main content area is titled 'AnnualPerformance - General 2018(due06/2019)' for Donna Wolk. A row of action buttons includes 'rate', 'print preview', 'copy evaluation', 'print blank form', 'pause evaluation', and 'Cancel Evaluation'. A 'Total Score' box shows 'Pending'. Below is a 'General Information' section with a table of evaluation details.

| DUE DATE | STATUS |
|--------------------|--------|
| Sat. Jun. 01, 2019 | Rating |

| | | | |
|-----------------|--|------------|----------------------------|
| Evaluation Name | AnnualPerformance - General 2018(due06/2019) | Employee | Donna Wolk |
| Type | Periodic | Position | Human Resource Coordinator |
| Archived | No | Department | Human Resources |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Click on Print.

The screenshot displays the NEOGOV Performance Evaluations interface. The top navigation bar includes 'NEOGOV', 'Perform', a search bar, and the user profile 'Erin Freeman'. The main menu contains 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Reports', and 'Help'. The left sidebar shows settings for 'Donna Wolk' with checkboxes for 'General Information', 'Raters', 'Content', 'Agency Wide Competencies', 'Current Goals', 'Rating Scales', and 'Process'. The 'Process' checkbox is highlighted with a red box. The main content area is titled 'Print Preview' and shows details for 'Donna Wolk' (Annual Performance - General 2018 due 06/2019) with a due date of 'Sat, Jun 1, 2019'. The 'General Information' section lists 'Position: Human Resource Coordinator', 'Division: Human Resources', and 'Evaluation Type: Periodic'. The 'Ratings Summary' section shows a 'Total Score' of 3.67, with a table of ratings from 'Donna Wolk' (Self Rater, 3.5) and 'Erin Freeman' (Rater, 3.67). The 'Content' section includes 'Agency Wide Competencies' (Section Weight 100%) and 'Interpersonal Skills' (Item Weight 8.34%). A red arrow points from the text 'Click on Print.' to the 'Print' button in the top right corner of the print preview window.

Do not change the default print settings.

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Meet with Employee

All tasks related to evaluations that you are required to do will be displayed on your landing page. Click on the task, not the evaluation, and you will be taken to that section of the evaluation to complete the task. Here you see the task “meet with employee” which was added to ensure this step is not skipped. Clicking on this task opens a fly-out where you acknowledge that you have met with the employee. This completes the evaluation process. **Please remember to send a signed copy of the evaluation to HR for the employee’s personnel record. Once all evaluations have been received, HR will prepare July 1st payroll change forms for your review.**

The screenshot shows the NEOGOV PE Perform dashboard. The top navigation bar includes 'NEOGOV', 'PE Perform', a search bar, and a user profile for Erin Freeman. Below the navigation bar are tabs for 'Evaluation Dashboard' and 'Goal Dashboard'. The 'My Tasks' section displays a summary of tasks: 1 Total, 0 Rating, 0 Approve And Sign, 0 Sign, 0 Approve, 1 Other, and 0 Overdue. Below this is a table with columns: Task, For Employee, Related To, and Due Date. The table contains one row: 'Meet with Employee' (circled in red), Donna Wolk, AnnualPerformance - General 2018(due06/2019), and 05/10/2019. The bottom of the dashboard shows 'My Evaluations'.

| Task | For Employee | Related To | Due Date |
|--------------------|--------------|--|------------|
| Meet with Employee | Donna Wolk | AnnualPerformance - General 2018(due06/2019) | 05/10/2019 |

NEOGOV-PE Evaluator and Department Head Dashboard Instructions

Workflow & Timeline



These are general guidelines in order to ensure no delay in processing the July 1st merit salary adjustments. If a step in the workflow process is finished early, you may move onto the next step before the date on the above timeline.

The NEOGOV-PE system is customizable so please contact the HR Director if you would like to add/remove/change steps or adjust the competencies to meet your departments' needs.

Questions?

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