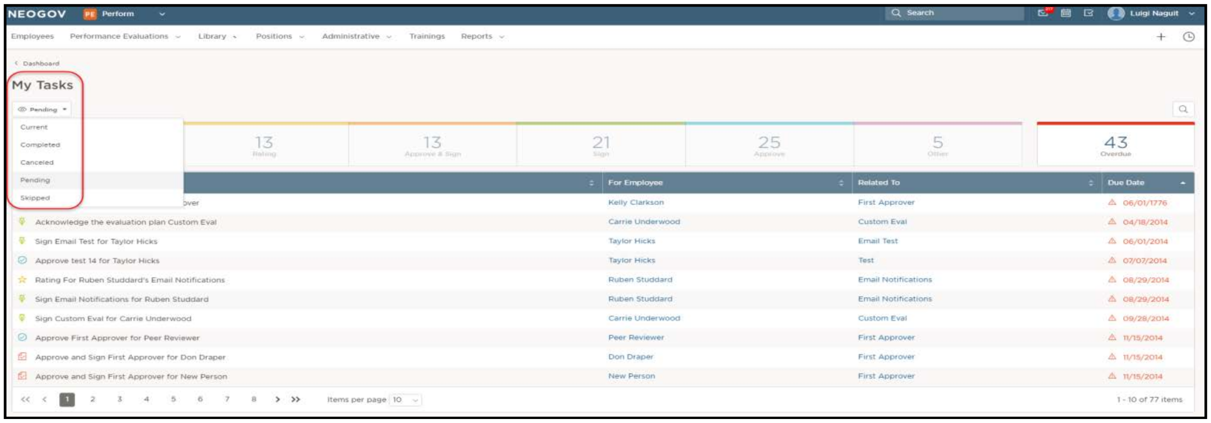
NEOGOV Perform Manager Training Guide

Topics include Goal Setting, Rating, Journal Entries and Approving, as related to the Manager roles in the evaluation process.

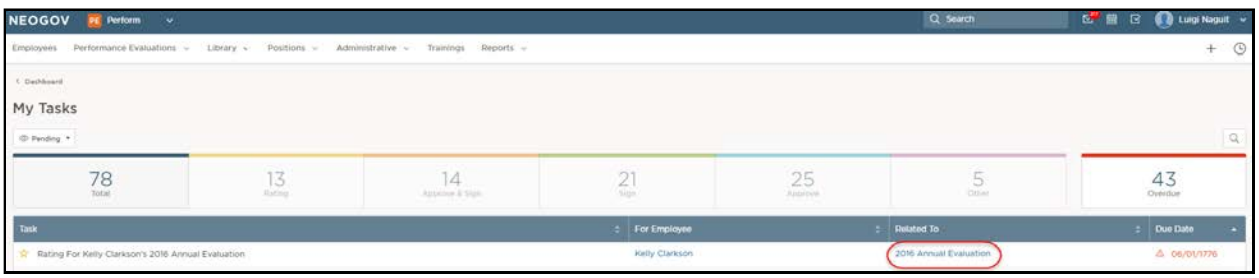
MODULE A – Adding Goals

If goal setting is conducted, Managers are able to enter goals on evaluations. In order to add goals to an evaluation, the evaluation must be in a *Draft* status.

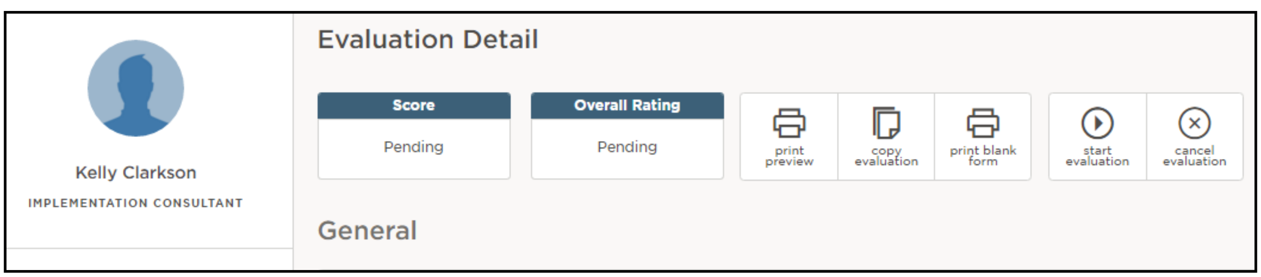
To add goals, from the **My Tasks** section of the **Dashboard**, select **View All** then filter on **Pending** tasks:



Then, find the evaluation you wish to add goals to, and click into the evaluation name under the **Related to** column:

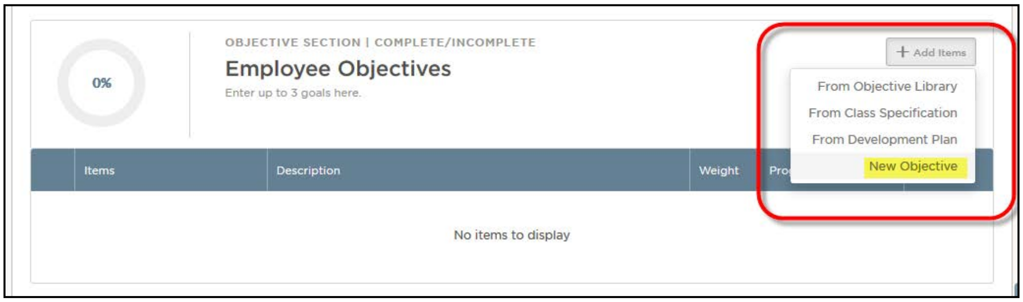


This will take you to the **Performance Evaluation Detail** page:



Scroll down to the Goals section. In this example, our Goals section is entitled **Employee Objectives**. Remember, a section for Goals will only exist if one has been added to the Evaluation Program!

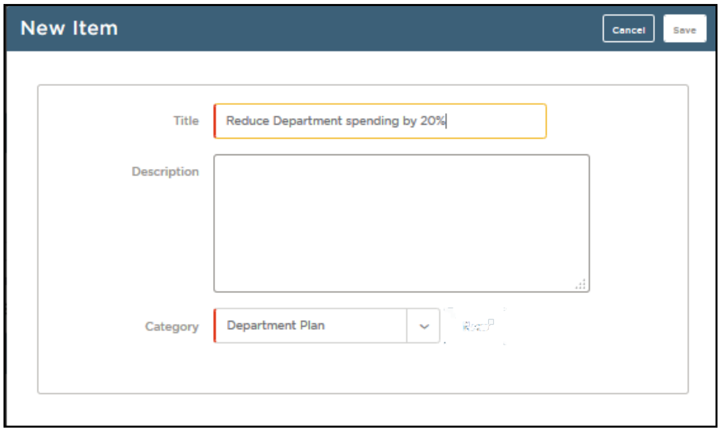
If security permissions have been configured to allow adding goals, the **+Add Items** button will show. Click **+Add Items**:



The following options will appear:

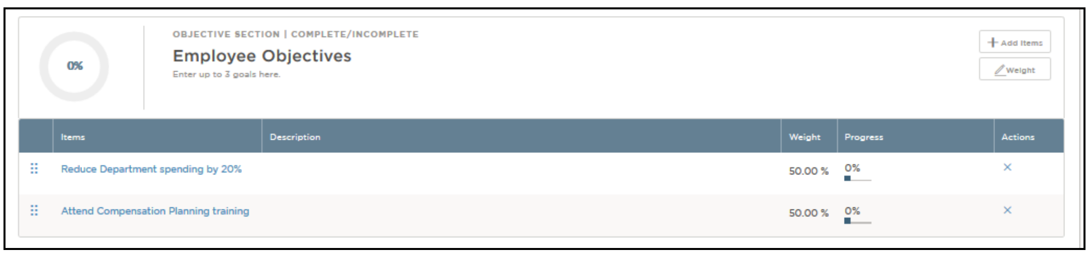
- **From Goal Library** – to select an existing goal from the Goal List. **<u>NOTE</u>**: in this example the option appears as From Objective Library because we renamed 'Goal' to 'Objective' in our Label settings.
- **From Class Spec** – to populate goals from Class Specs (if goal associations have already been configured by HR).
- **From Development Plan** – to populate goals from a current Development Plan, if any exist.
- **New Goal –** to create a brand new goal. **<u>NOTE</u>**: in this example the option appears as New Objective because we renamed 'Goal' to 'Objective' in our Label settings.

When creating a new goal, enter the goal **Title** (required), a longer **Description** of the goal (optional), and select a **Category** (required). **<u>NOTE</u>**: Categories are pre-defined by the HR Administrator.



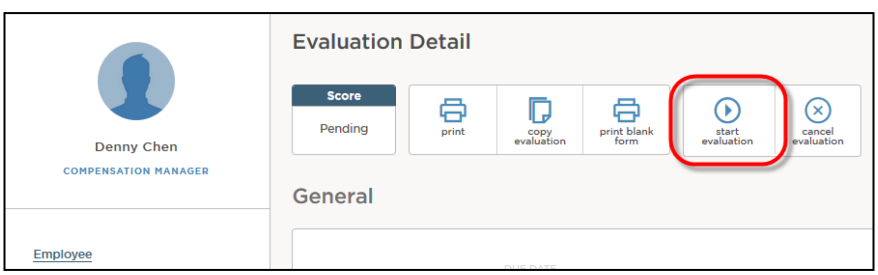
TIP! HR has the ability to configure security permissions to also allow individuals to add goals to the overall **Goal List**, when adding a new goal to an evaluation. If security permissions allow, the user would see the option to add the newly created goal to the library. **NOTE**: Any goals added to the library would then be visible to all users in the same Department.

Click **Save** to retain the goal, or **Cancel**.

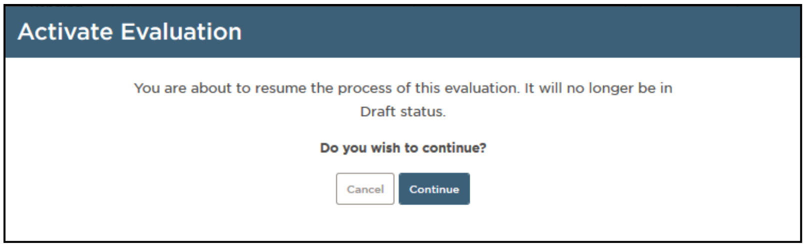


Once saved, the goal is immediately added to the evaluation. Repeat the process to add additional goals, as needed.

If no further goals will be added, the evaluation can then be activated. If security permissions allow, a manager can take this action. In this example, the manager has the required security permissions to **Start Evaluation**:

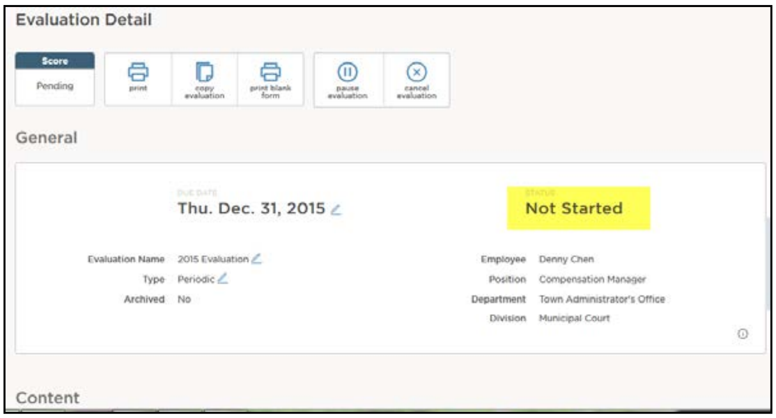


Once the **Start Evaluation** button is selected, a popup message will appear advising that the evaluation will no longer be in *Draft* mode:



Click **Continue** to **activate** the evaluation.

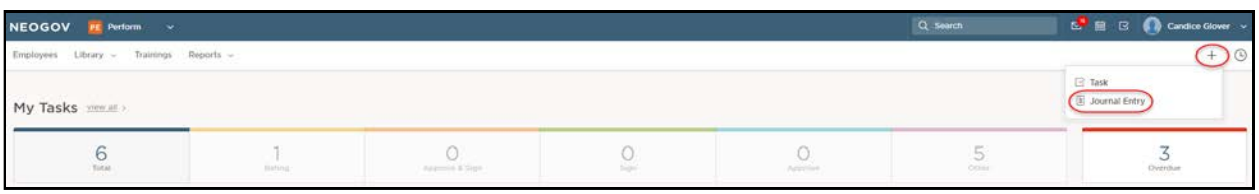
Note the status immediately changes to **Not Started**, and the evaluation (rating) process is ready to begin.



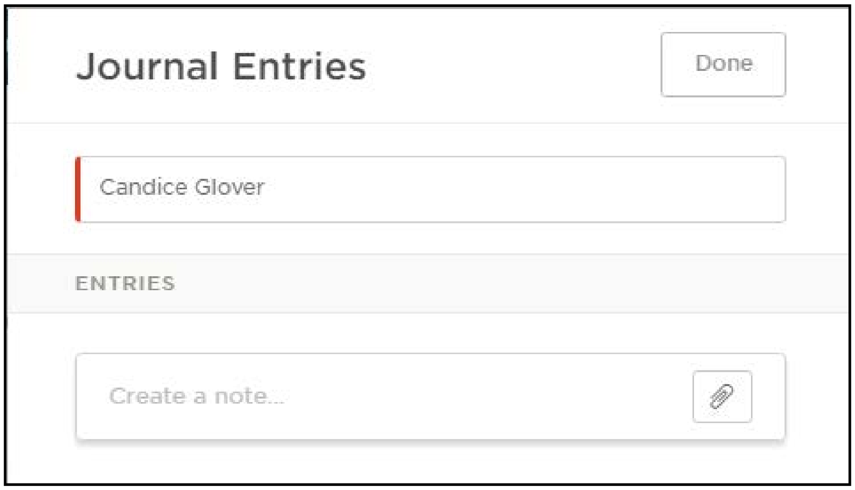
MODULE B – Journal Entries

Throughout the course of the year managers may want to keep note of important accomplishments, observations, work tasks and/or events that pertain to a particular employee. They can do this by logging Journal Entries.

To quickly create a Journal Entry, users can utilize the Quick Add menu by selecting the "+" icon in the top right of any page within Perform. After you select the "+" icon, be sure to select **Journal Entry**.



Next, select **Create a note…**



TIP! The user can also immediately select the paper clip icon in order to add an attachment to the journal entry. Or they can simply select **Create a note…** then add an attachment as seen in the screenshot below.

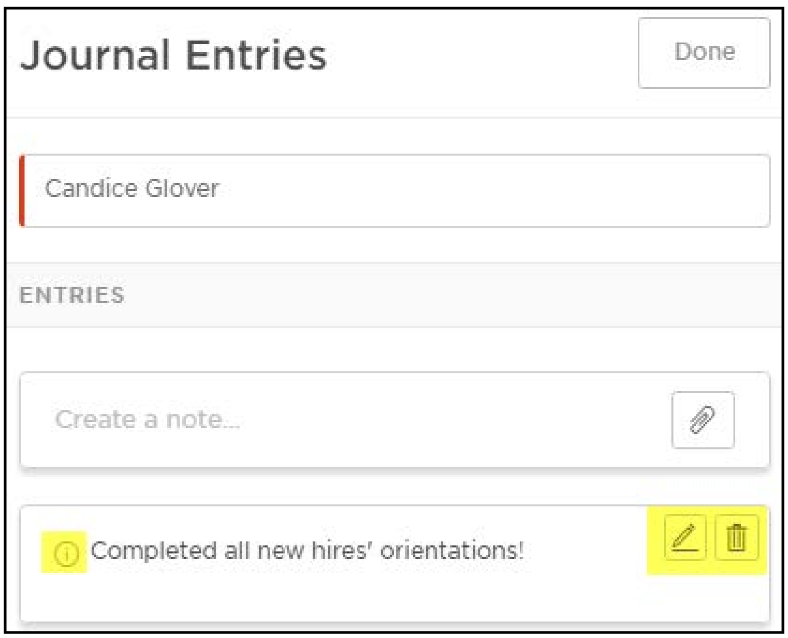
<u>NOTE</u>: A Manager would be able to search for any employee (in the required field above) within their hierarchy and log a journal entry for them.

Users have the ability to use the Rich Text Editor (RTE) while creating the journal entry. Once text or an attachment has been added to the journal entry, the system will auto-save it. Once complete, select **Done**.

The journal entry will reside on the Employee Details page of the employee for whom it was created (Candice Glover).

NOTE: By default, Journal entries are saved as private, so only the creator of the journal entry is able to view it on the target employee's Employee Details page. For example, if Candice's manager logged a journal entry for her, then Candice would not be able to see it on her Employee Details page; only her manager would be able to view it unless her manager "shared" it with her.

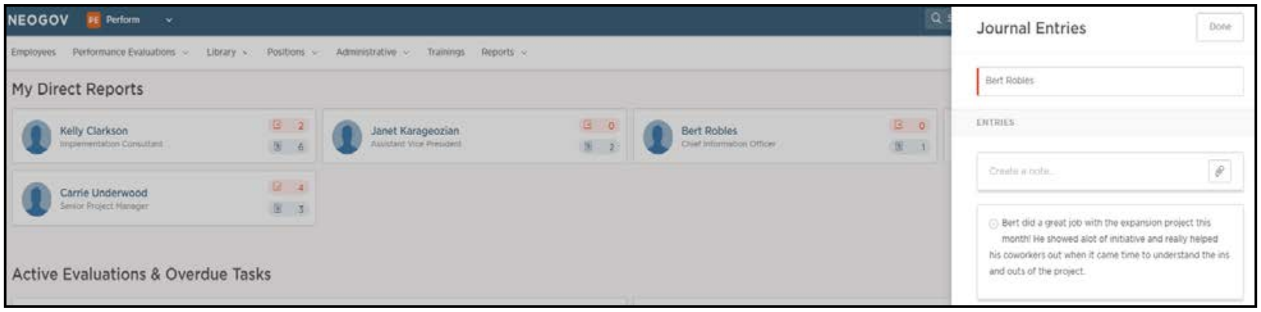
The creator of the journal entry is able to access the journal entry on the target employee's Employee Details page. Select the journal entry icon, as seen in the screenshot above, and the fly-out below will appear.



Managers may have the ability to edit or delete the journal entry, if security permissions allow. They may also hover over information icon in order to see when the journal entry was last updated, by whom it was created, and whether it is public or private.

Managers may also access and/or create journal entries for their direct reports from their own Dashboard.

From the **My Direct Reports** section, users can click on the blue journal entry icon and the fly-out below will appear. From here they would be able to see any journal entries that they have access to, as well as create a new journal entry for that employee (or any of their direct reports).



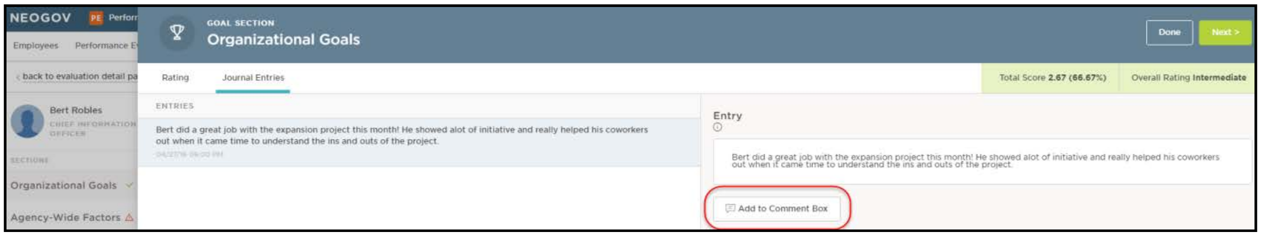
Journal Entries + Rating Evaluations

Journal entries will be available for the creator to reference when it is time to rate the target employee. For example, while rating an evaluation, instead of the manager having to remember a specific event that occurred months back, they would have logged it as a journal entry for that employee.

As seen below, when it is time to rate an evaluation, the rater will have a section on each rating card for **Journal Entries**. Journal entries are accessible for Goal, Competency, and Narrative sections.

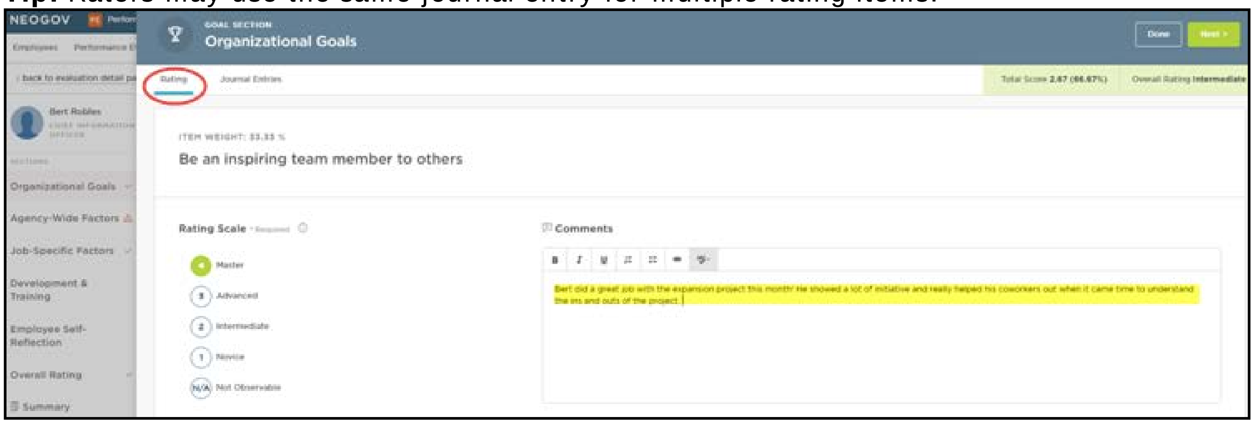
NOTE: If the rater has not logged any journal entries for the target employee then the **Journal Entries** tab will not appear on the rating cards.

When **Journal Entries** is selected, the rater will see the journal entries that they have logged for the target employee. If raters would like to add a journal entry to the comment box for the goal, competency or narrative item, they can select **Add to Comment Box**.



When raters toggle back to the **Rating** tab, they will see that the journal entry has been added to the comment box, as seen below.

Tip! Raters may use the same journal entry for multiple rating items.



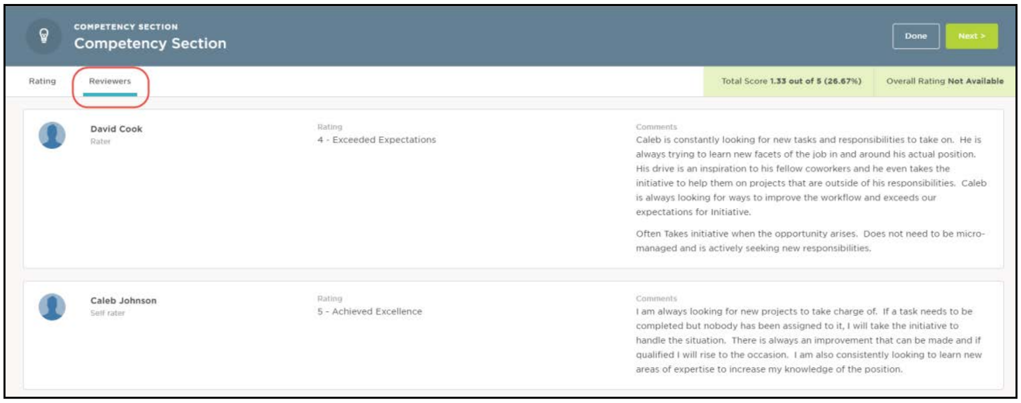
MODULE C – Rating a Performance Evaluation (RoR Role)

The process to rate an evaluation is essentially the same for all raters, i.e. for self-raters, peer reviewers, or Raters of Record. Each rater can access rating tasks requiring their action directly from **My Dashboard**, then click into each "item" in the evaluation rating form to enter their rating and/or comments.

The actual content in each evaluation rating form, however, may differ by rater as configured in the Evaluation Program or as additional raters have been added to the evaluation. Some sections may not appear to all raters, while other sections may require ratings from some raters but comments only from others.

The **visibility** for each rater can be configured in the Process section, to restrict or grant access to see what others have submitted in the evaluation rating form. Typically any Rater(s) of Record can see what all other raters have submitted. These comments and ratings from additional raters appear in the **Reviewers** section within each item on the rating form.

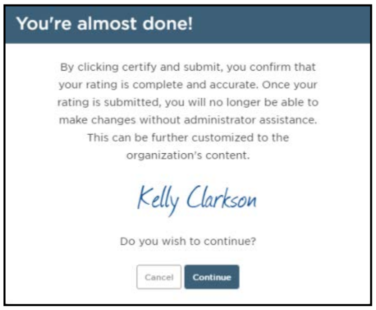
NOTE: if a rater's visibility has been configured to "See Only Own Ratings" the **Reviewers** section will not appear.



Click on **Rating Chart** in the Summary section to see a comparative view of all ratings submitted thus far.

NOTE: Ratings and comments will only appear for those who have actually submitted their reviews. Raters cannot see ratings that have been drafted, but not yet submitted by other raters.

When all required items have been completed, click **Submit**. Confirm that the rating is complete and accurate by selecting **Continue** once more. Otherwise, select **Cancel** to return to previous page.



Once successfully submitted, if an approval process is required, an email will be automatically triggered to the first approver.

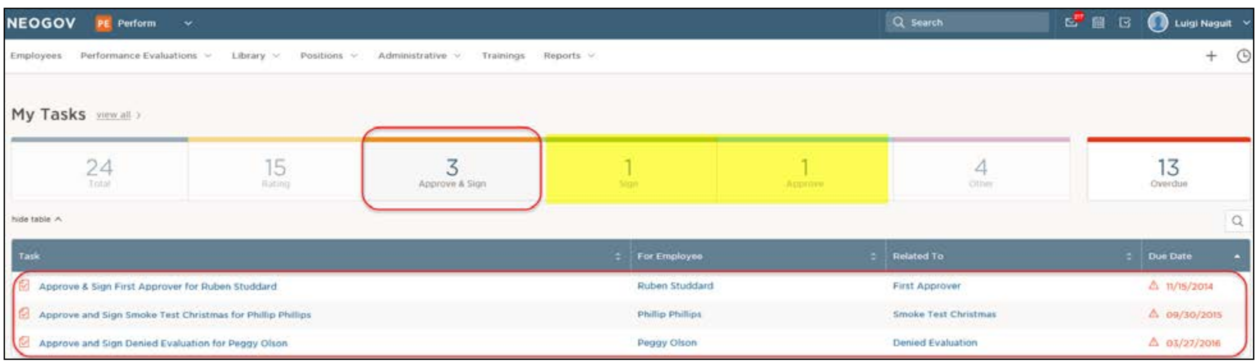
MODULE D – Approving & Signing an Evaluation

Evaluations may be subject to an approval process, as configured by HR in the **After Ratings** section of an Evaluation Program or an individual employee evaluation. Acknowledgment tasks can be in the form of an approval, a signature, or a combination of both.

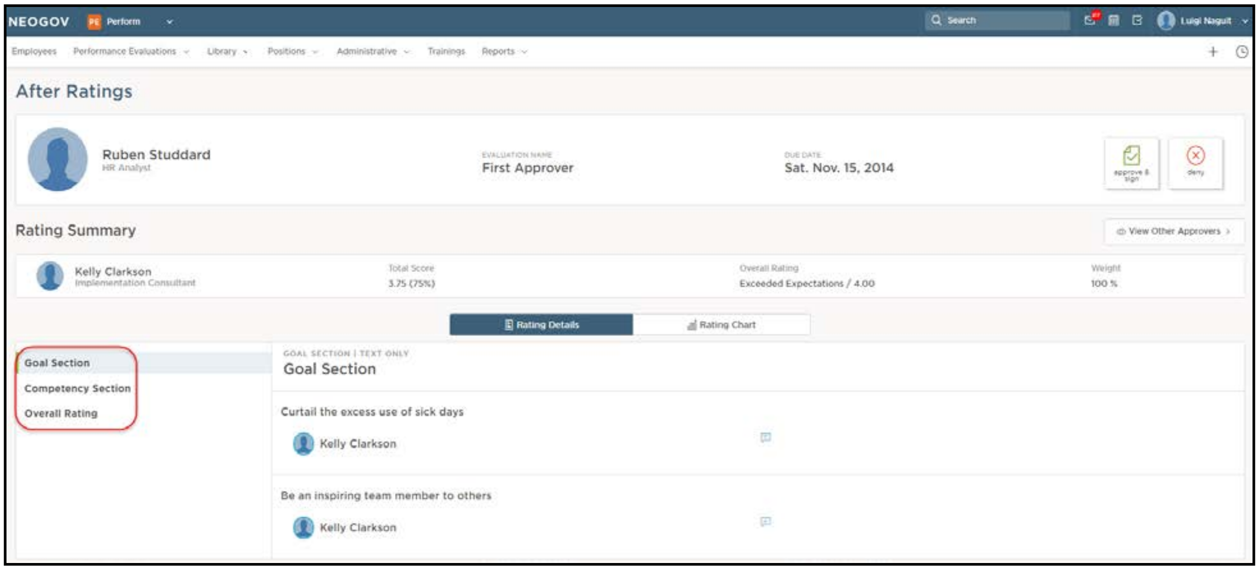
When the Rater of Record submits an evaluation, the approval process is officially kicked off, generating an email to the first person in the approval process. Once their action is recorded, an email is automatically triggered to the next person in the sequence.

When ready for action, the approval task becomes **Current** in the **My Tasks** section of **My Dashboard**. These tasks will reside in the Approve & Sign, Sign or Approve boxes on the Dashboard, as seen below.

To approve and/or sign, click on the icon or task title under the Task column:



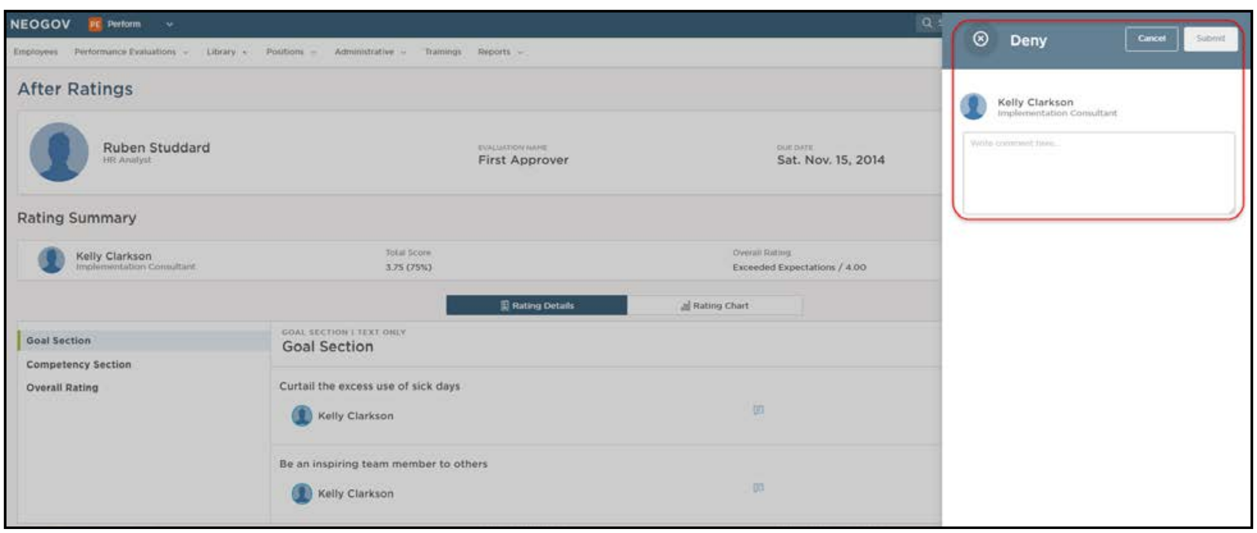
Once the **Evaluation Approval** page appears, click through each Content section to view full details of the evaluation before recording the approval or denial:



In this example, the 1st approver has both approval and signature rights. Hence, the approval icons and the signature line will appear once you select **Approve & Sign**.

Click the **Approve & Sign (or Approve)** icon and select **Submit**, if you agree with all ratings and comments.

If you disagree with anything, and would like to see changes made, select the **Deny** icon. Be sure to enter comments, and when ready click **Submit**. An email will be generated to any rater(s) the evaluation has been sent back to for changes.

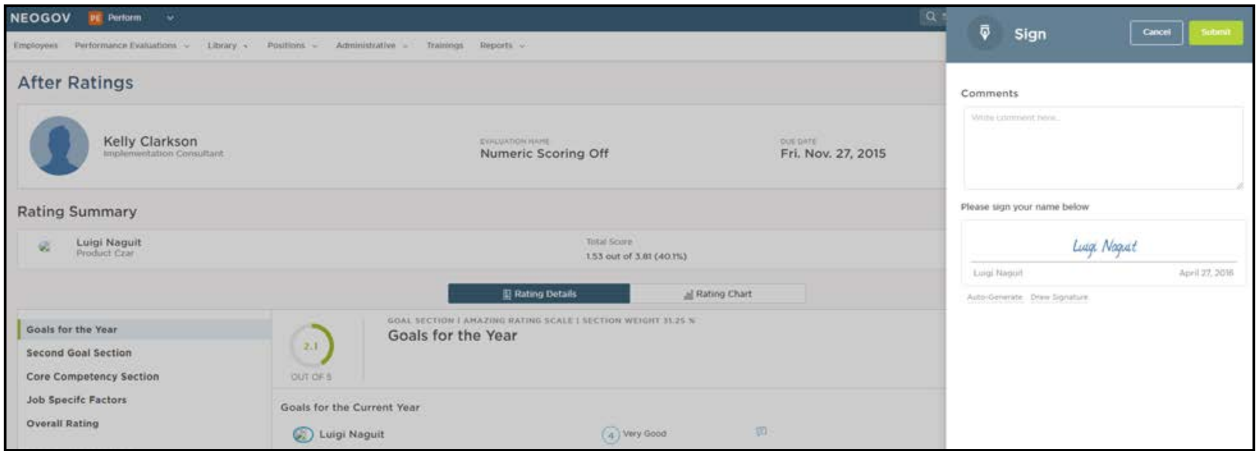


NOTE: When an evaluation is denied, and it is sent back to any weighted rater(s) for changes. Once the Rater(s) resubmit, the approval process is re-triggered again to the 1st Approver.

When an evaluation is approved, an email is immediately generated to the next approver in the sequence to record their approval and/or signature.

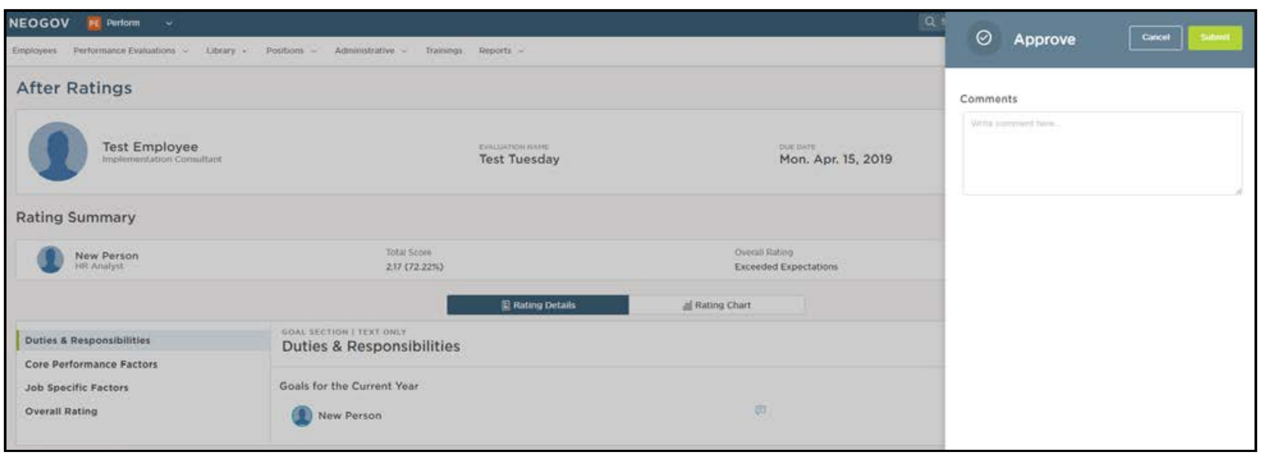
If only a signature is required, the option to approve/disapprove will not appear. Typically, employees are granted signature rights only.

Enter an electronic signature or draw in your own by clicking **Draw Signature**:

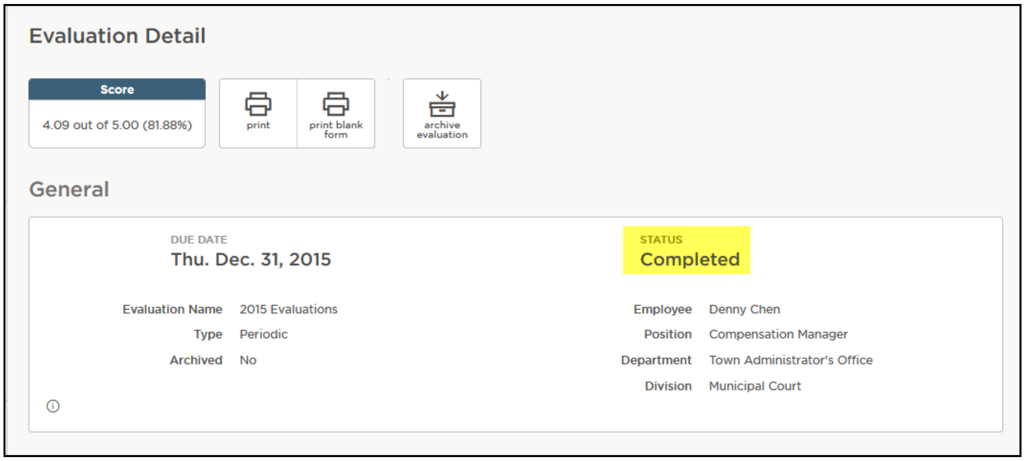


Enter any comments, and click **Submit**.

TIP! If an approver has not been granted signature rights, but they have been granted the approver role only, the signature line will not appear. If the signature line should be available, HR must edit the approver's **Acknowledgment Type** (to **Both**) in the Process section of the Evaluation Detail page.



Once all approvals and signatures have been recorded, if there are no further approvers in the **After Ratings** section, the evaluation is considered *Completed* and the status will update accordingly.



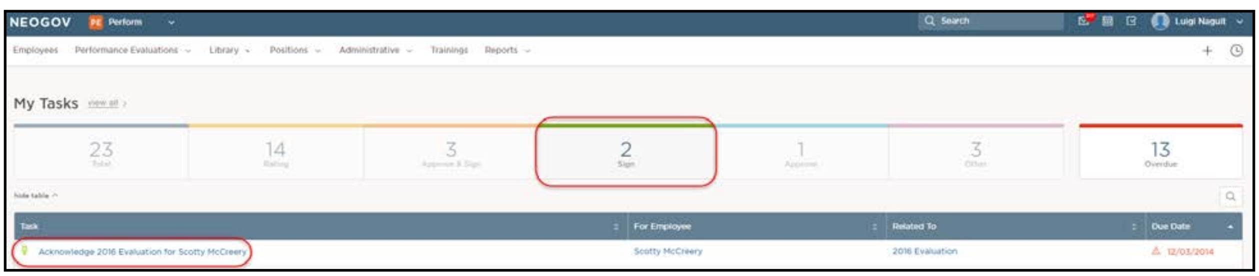
MODULE E – Other Tasks

In addition to Rating and Approval tasks, there are other tasks that can be created and assigned to an individual in the system.

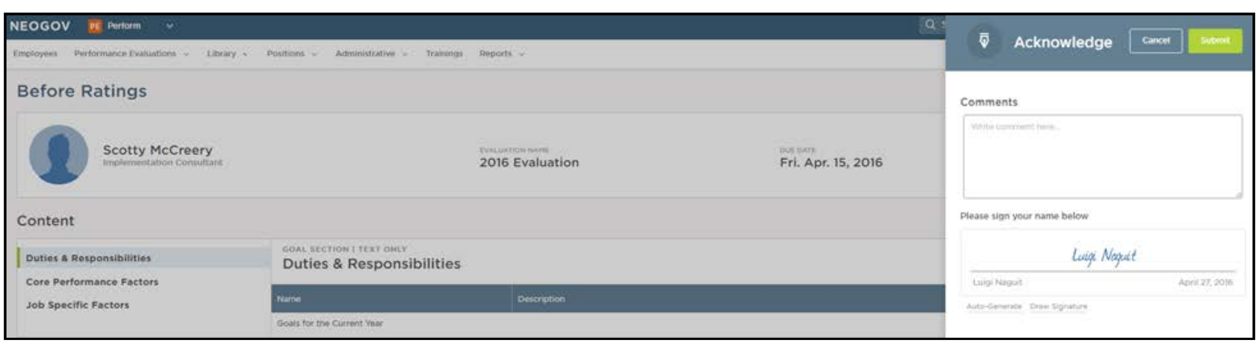
Before Ratings tasks can be in the form of acknowledgements. If before-ratings tasks are configured in a Program or individual evaluation, a user might be required to acknowledge the evaluation before rating can begin.

The task will appear in the **Dashboard** as **Current** as soon as the evaluation is **Activated**.

To complete the before-rating (acknowledgment) task, be sure to filter on the **Sign** box and select the icon or task title below the Task column:



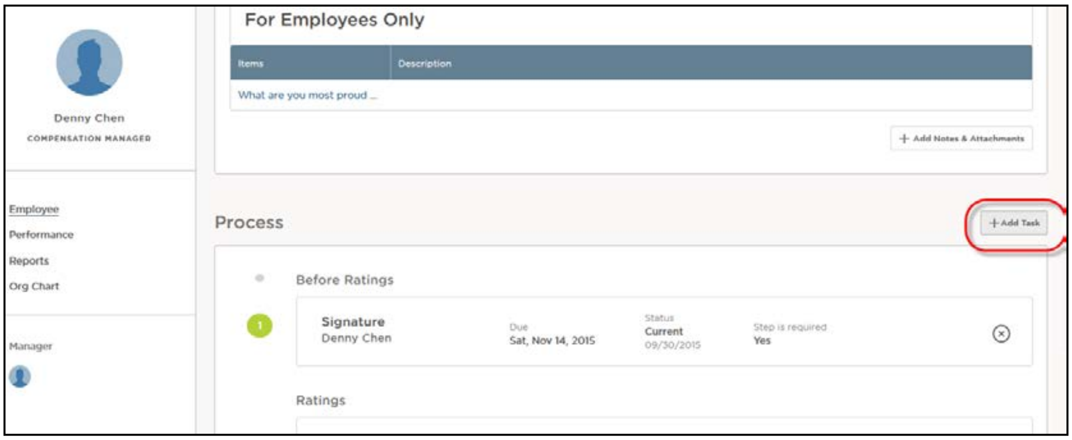
The individual can sign and enter any comments to acknowledge the evaluation.



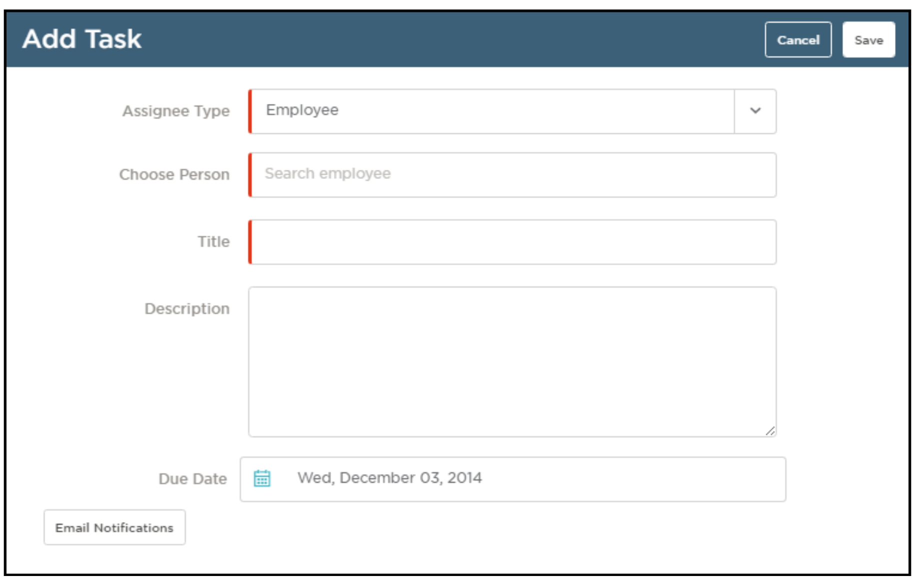
Once submitted the acknowledgment is recorded and the evaluation process continues. If no other before-ratings tasks are required, rating can begin.

If security permissions allow, users might be able to create additional tasks related to evaluations for themselves or other employees. Tasks can be created from within the **Evaluation Detail** page (as configured by security).

To create an additional evaluation task, access the respective evaluation by clicking into the **Evaluation name**, then scroll to the **Process** section. Click the **+Add Task** button:



Enter the name of the individual the task should be assigned to (**Assignee**), the name of the task (**Title**), some additional optional text in the **Description** field, and the task **Due Date**:



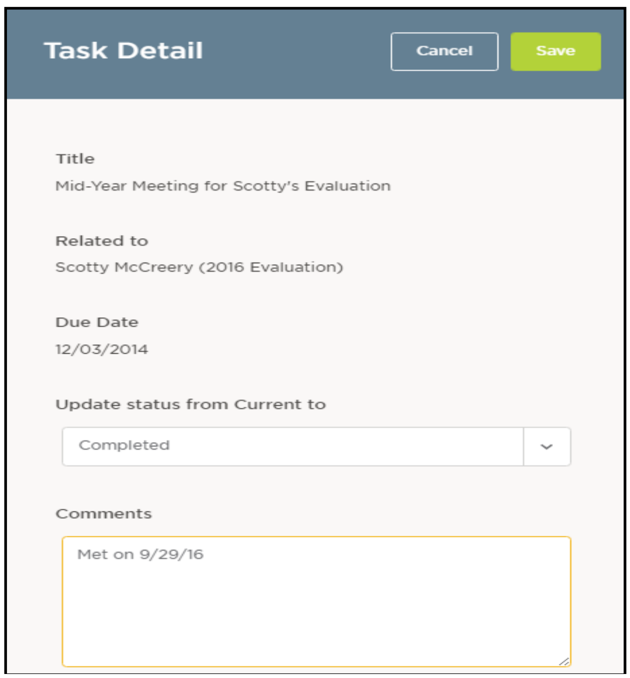
Click the **Email Notifications** button to send advance reminders and overdue emails, as desired. Click **Save** to add the task to the evaluation, or **Cancel**.

Once saved, the task is immediately added to the assignee’s dashboard.

<u>NOTE</u>: tasks can be added to evaluations while in any status (*Draft*, *Not Started*, *Rating*, *Approval*, etc.). However, the tasks will only appear as **Current** on the **Dashboard** once the evaluation is **activated**.

To complete the task, be sure to filter on the Other box and then select the icon or task title under the Task column:

Enter any comments and ensure the Task **Status** is set to *Completed*. Click **Save**.



The task is immediately moved from the **Dashboard** to *Completed* tasks. The evaluation process continues.

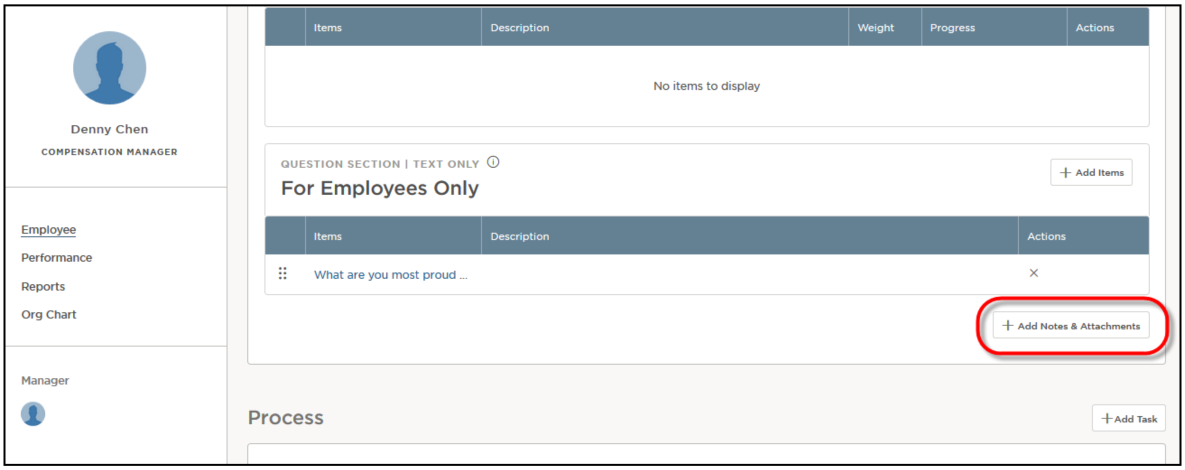
MODULE F – Notes & Attachments

Managers can add notes or attachments to an evaluation.

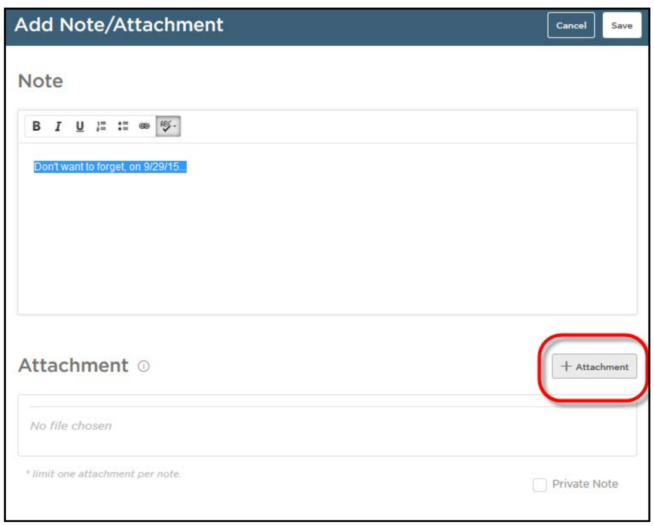
<u>NOTE</u>: Notes and attachments can be added to evaluations while in any status (*Draft*, *Not Started*, *Rating*, *Approval*, etc.).

Notes and attachments can be added to an evaluation from within the **Evaluation Detail** page (as configured by security).

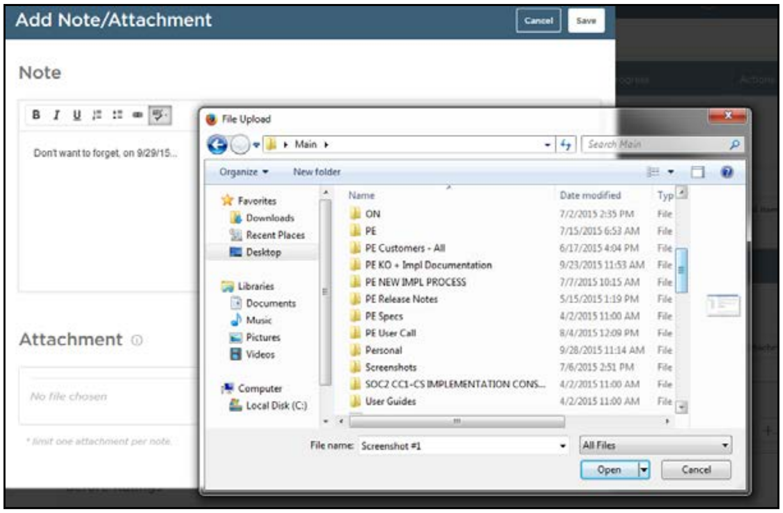
To add a note or attachment, access the respective evaluation by clicking into the **Evaluation name**, then scroll to the bottom of the **Content** section. Click the **+Add Notes & Attachments** button:



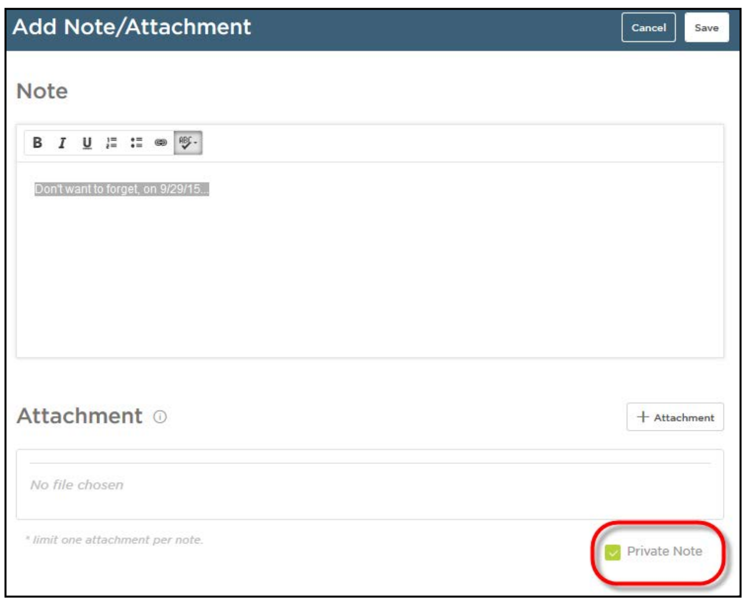
Type directly into the body of the **Note**, and use the **RTE** as needed to format any text.



Click the **+Attachment** button to add a file as an attachment, and browse to select the file:

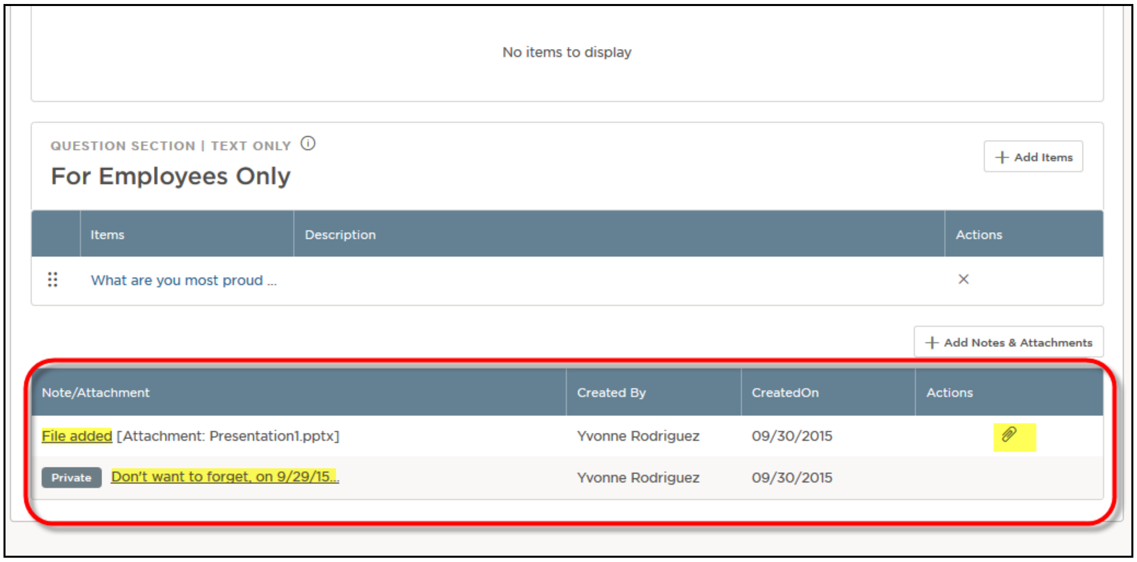


Select **Private Note** to hide the note from anyone else with access to the evaluation.



To launch a note or attachment for viewing, access the corresponding **Evaluation Detail** page, scroll down to the bottom of the **Content** section to see all notes and attachments then click into the respective note or attachment.

To read the note click into the text hyperlink; to launch the attachment click on the paperclip icon under the **Actions** column:



Repeat to add as many notes or attachments as necessary, throughout the evaluation process.