

NEOGOV Perform Employee Reference Guide

This reference guide explains setting up your NeoGov account, rating your Self-Evaluation, and approving your evaluation.

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A – Activating your NeoGov Account

For first time users, Human Resources will create your account. NeoGov will send the new user an automated email with the login information. New users will have 24 hours to activate their account.

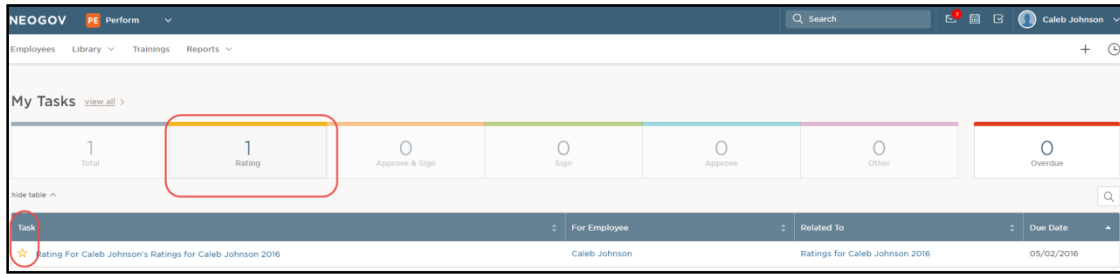
Returning users will use the same username/password combination as before. HR can assist in resetting your password if locked out.

B – Employee Self-Evaluation

Most departments that use NeoGov Perform for online performance evaluations offer the employee an opportunity to rate his/her own performance annually. Employees will be prompted via email notification when your self-evaluation is coming due (generally two to three weeks in advance of the deadline).

If an employee has been tasked to complete a self-evaluation, the rating task will appear in the **My Tasks** section of the **Dashboard**. The rating task should be found under the **Rating** box. If it does not appear, the evaluation has not yet been activated and is still in a *Draft* status, which means your supervisor is making changes to your individual evaluation to possibly add or edit goals/objectives.

To start rating the evaluation, select the **Rate** (star) icon from the **My Tasks** section of the **Dashboard**:

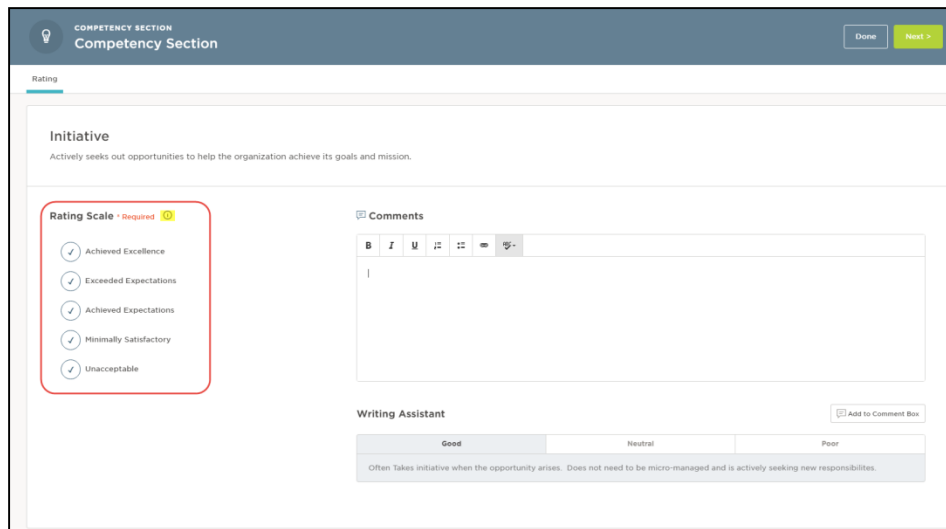


This will take you directly into the **Performance Evaluation Rating** form.



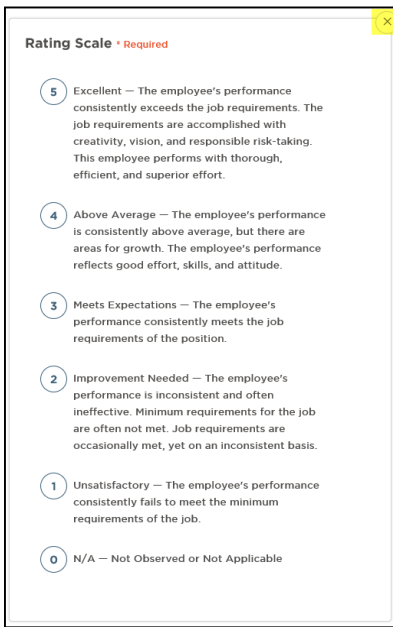
The evaluation Rating Form consists of a section navigation menu at the left hand side that displays all sections on your evaluation. Clicking on a section will display the section items that are to be rated in the center screen. Click on an item to open a fly-out page to begin rating.

Select a **Rating** from the rating scale provided. If there is no scale provided, enter comments only:



NOTE: Fond du Lac County uses numeric scoring, wherein numeric values of each rating scale level will be displayed. However, if numeric scoring is not used, the numeric values will be replaced by checkmarks.

To view a more detailed description of the rating scale levels provided by HR, click on information icon to the right of **Rating Scale**. The additional details can assist in understanding the definition of each rating level:

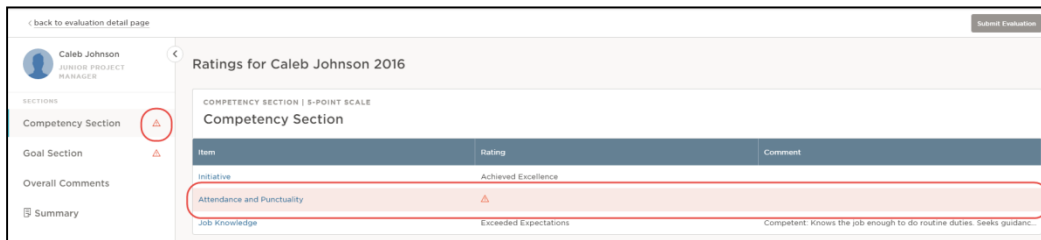


Click the **x** in the upper right to close the window and return to the rating form.

NOTE: Your self-evaluation is not weighted. Only the supervisor’s (and potentially any additional raters’) scores make up 100% of your overall evaluation score.

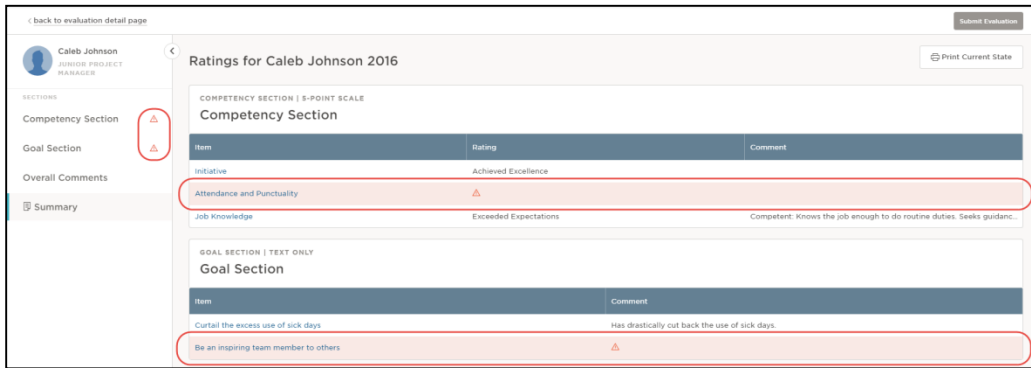
Move to the next rating item by clicking the **Next >** button in the upper right.

Repeat the process to rate each item in the rating form. If a goal or competency has been missed, a red triangle will appear next to the section name and the missed item will be highlighted in red within the Content Section.



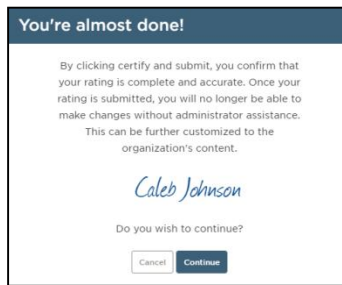
TIP! It is not necessary to click any save button as data entered in each rating card is automatically saved every few seconds. The auto-save displays when the data is **saving** or is **saved**.

For a complete overview of the evaluation thus far, click the **Summary** section at the left side menu. Details of any required items missed are flagged.

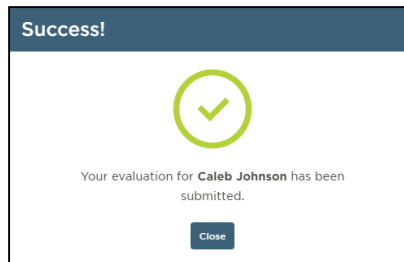


Click the **Print Current State** button for a printable copy of the in-progress ratings and any comments you've entered.

Once the evaluation is completed, click **Submit Evaluation**. Again, any missed required items will be highlighted. If all items have been completed and the evaluation is accurate, select **Continue** from the popup message. Otherwise, select **Cancel** to return to previous page.



Once confirmed, a **Success** message will appear.



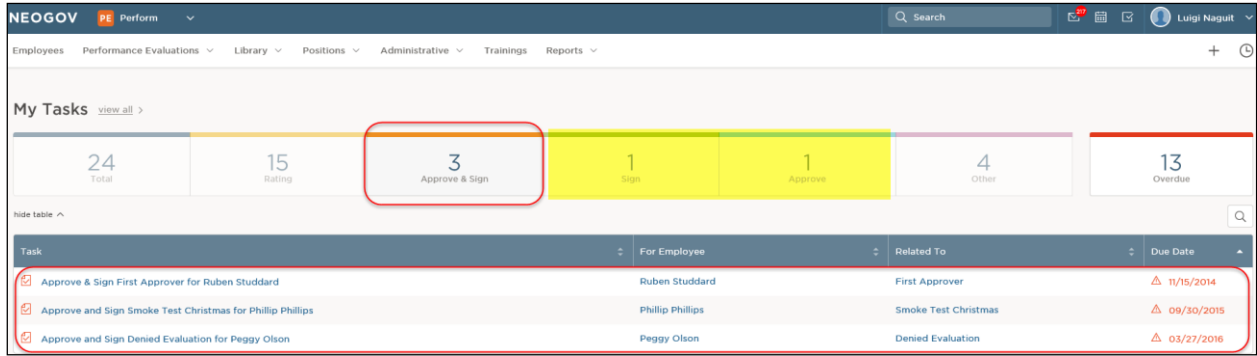
NOTE: Once your self-evaluation has been submitted, you can no longer make any changes or edits. Please do not submit until you are sure it is completed to your satisfaction.

C – Signing an Evaluation

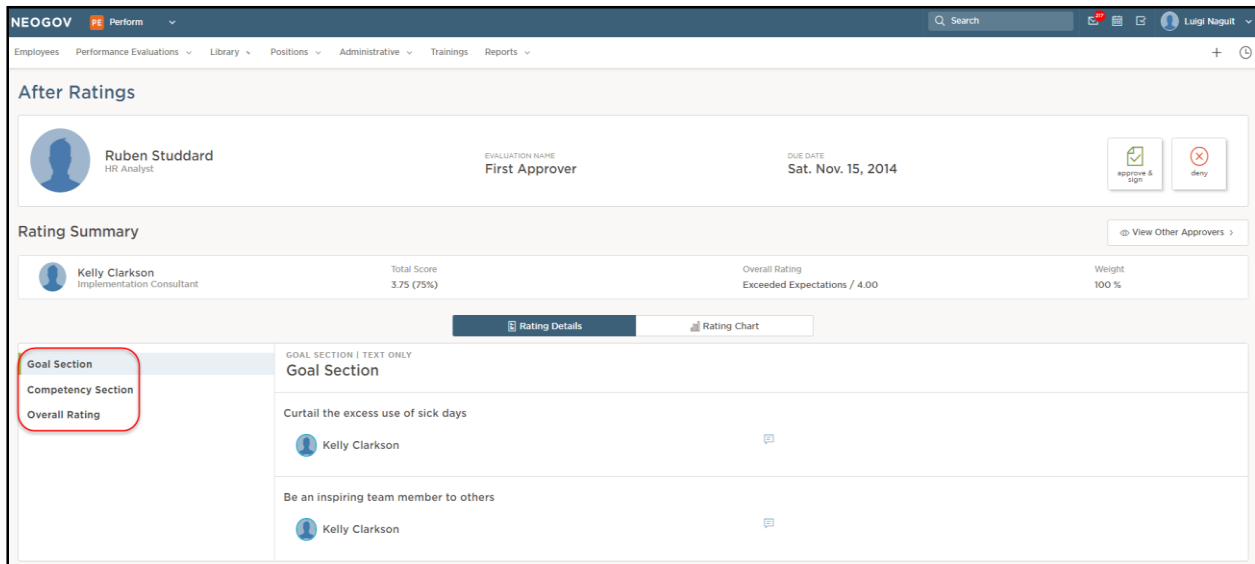
Once your supervisor has completed and approved your evaluation, you will receive an email notification prompting you to review and sign it. You will be allowed to make additional comments based on your supervisor's remarks, if desired. You will be asked to sign your official evaluation.

When ready for action, the signature task becomes **Current** in the **My Tasks** section of **My Dashboard**. This task resides in the Sign box on the Dashboard, as seen below.

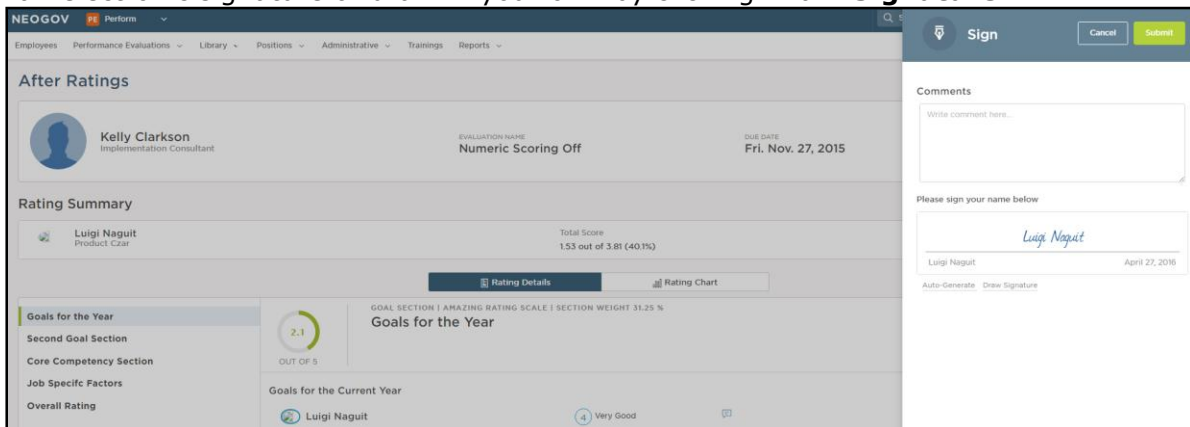
To sign, click on the icon or task title under the Task column:



Once the **Evaluation Signature** page appears, click through each Content section to view full details of the evaluation before signing:



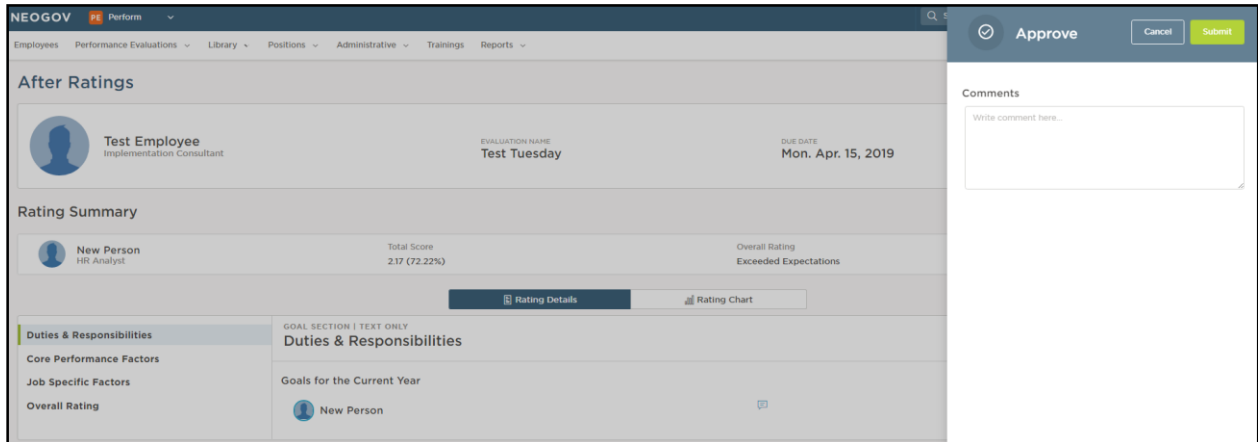
Enter an electronic signature or draw in your own by clicking **Draw Signature**:



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

NOTE: Before clicking submit, employees will be prompted with a disclaimer message indicating that the employee's signature does not necessarily mean he/she agrees with the contents of the

evaluation; it signifies that it has been reviewed and has had the opportunity to make additional comments and/or follow up directly with the supervisor.

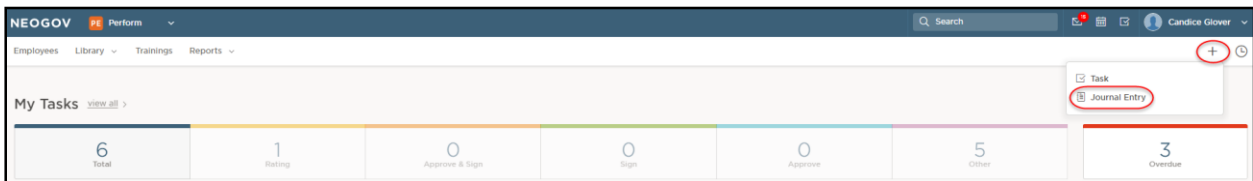


Once the signature has been recorded, the evaluation is considered *Completed* and the status will update accordingly.

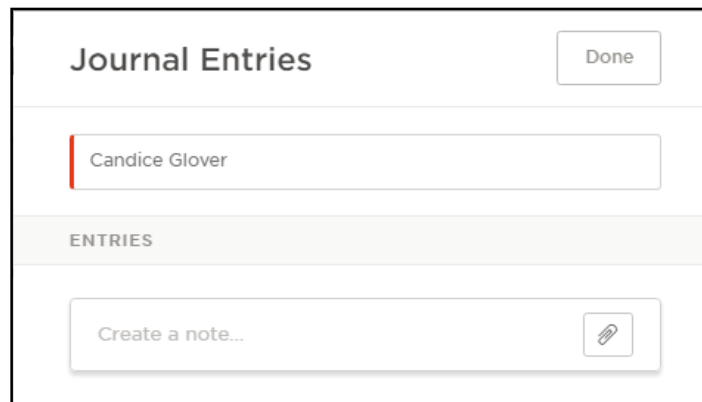
D – Journal Entries (optional)

Throughout the course of the year, employees may want to keep note of important accomplishments, work tasks and/or events that he/she would want to remember to include in the performance evaluation. They can do this by logging Journal Entries.

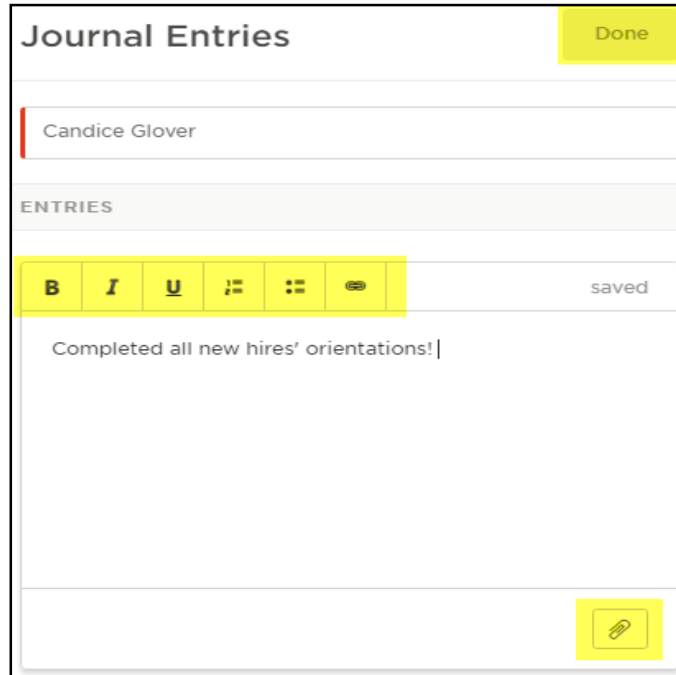
To quickly create a Journal Entry, users can utilize the Quick Add menu by selecting the “+” icon in the top right of any page within Perform. After you select the “+” icon, be sure to select **Journal Entry**.



Next, select **Create a note...**

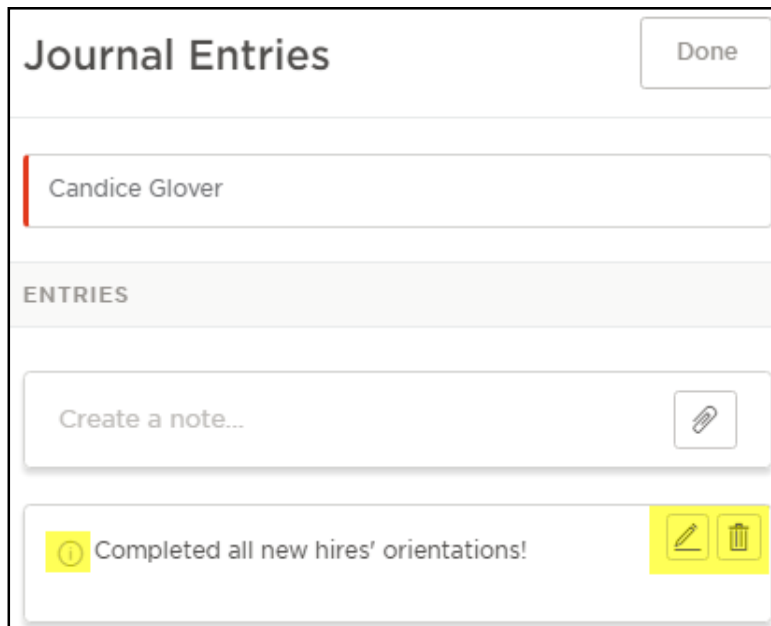


TIP! The user can also immediately select the paper clip icon in order to add an attachment to the journal entry. Or they can simply select **Create a note...** then add an attachment as seen in the screenshot below.



Once text or an attachment has been added to the journal entry, the system will auto-save it. Once complete, select **Done**.

NOTE: By default, Journal entries are saved as private, so only the creator of the journal entry is able to view it. For example, if Candice logged a journal entry, then Candice's supervisor would not be able to see it. However, HR can view all journal entries within the system.

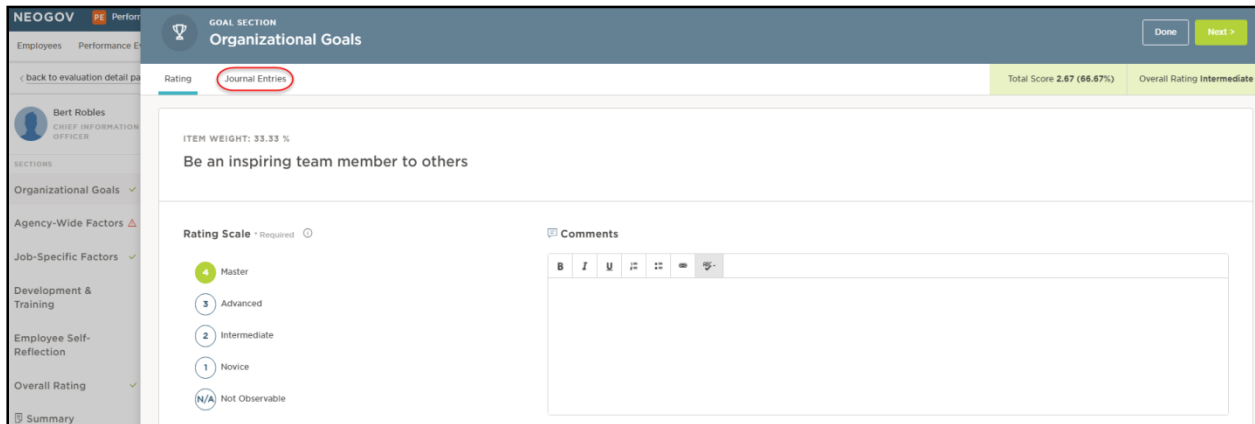


Employees may have the ability to edit or delete the journal entry, if security permissions allow.

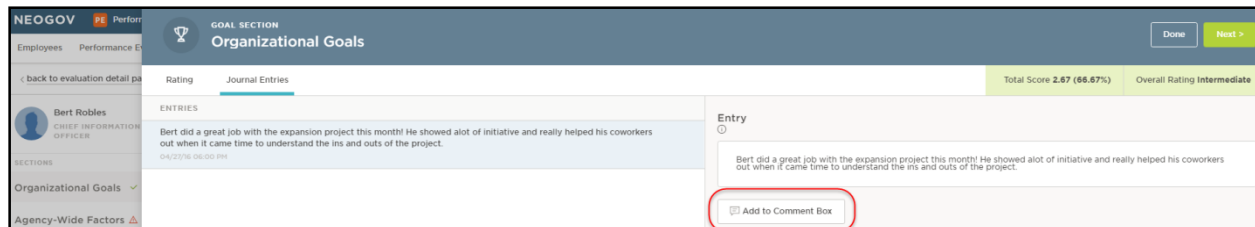
Journal Entries + Rating Self-Evaluations

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

As seen below, when it is time to rate an evaluation, the employee will have a section on each rating card for **Journal Entries**, as long as the employee has used this feature.



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



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

Tip! Employee's may use the same journal entry for multiple rating items.

