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# PERFORM: Manager Training

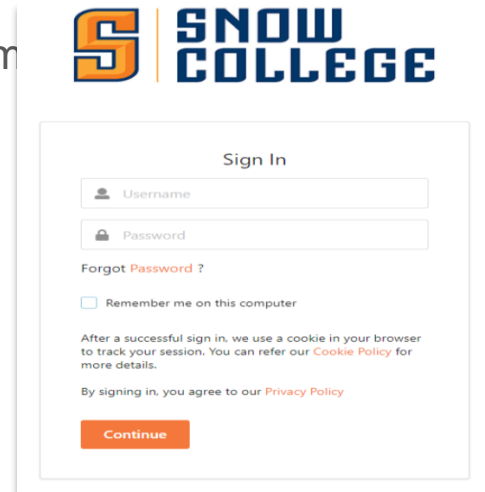


# Agenda

1. Introduction to Perform
2. Manager Permissions
3. Employee Permissions
4. Journal Entries
5. Setting Goals
6. “My Dashboard”
7. Helpful Hints
8. Evaluation Process Overview
9. Evaluation Process Demonstration
10. Questions

# NEGOV Perform

- Designed to **automate** performance review process, all related tasks, & reminder emails
- Track performance and development of employees
- Key contributor to building stronger relationships between managers and employees and the overall success of an organization
- 100% Internet-based: IE 11, Edge & Chrome
- Login



The screenshot shows the Snow College login interface. At the top left is the Snow College logo, featuring a large orange 'S' followed by the text 'SNOW COLLEGE' in blue. Below the logo is a white box titled 'Sign In'. Inside this box, there are two input fields: 'Username' with a person icon and 'Password' with a lock icon. Below the password field is a link for 'Forgot Password?'. There is a checkbox labeled 'Remember me on this computer'. A paragraph of text explains that a cookie is used for session tracking and provides a link to the 'Cookie Policy'. Below that, another line of text states 'By signing in, you agree to our Privacy Policy' with a link to the 'Privacy Policy'. At the bottom of the sign-in box is an orange 'Continue' button.

# Manager Security Permissions

## What will Managers Have Access to?

- **View** any employees within their managerial hierarchy (Direct & Indirect Reports), and their respective Performance Evaluations
- **Create & Share** Journal entries on an ongoing basis (all year) for employees within hierarchy
- **Rate, Approve, & Sign** Performance Evaluations
- **Complete** Check-ins with Direct Reports
- **Create** Future Goals for Direct Reports
- **View** Reports (analytics) for employees within managerial hierarchy

# Employee Security

## Permissions

### What will Employees Have Access to?

- **View** their own Employee Talent Profile
- **Create** own Journal Entries
- **Add & Acknowledge** Goals on self-evaluations
- **Complete** self-evaluations
- **Complete** 360 feedback for their Direct Managers
- **Sign** self-evaluations

# Journal Entries

## What are Journal Entries?

- **Reflective Notes and/or attachments** associated to an employee's profile
- Provide **continuous feedback** throughout the year

## Who can view Journal Entries?

- By default, entries are **private** but can be **shared** (3 levels: employee, manager, manager's manager)
- HR Admins can view **all** Journal Entries in system
- Try to refrain from derogatory language

## How are Journals used in Evaluations?

- Can **view** all historical journal entries in evaluation rating form
- Can select to import directly into **Comments**
- Can also **email** entries to: [Journals@neogov.net](mailto:Journals@neogov.net)

- **Subject line:** must include Employee's full name (as saved in Perform)

# Setting Goals

## When are Goals created?

- Managers can **add Future Employee Goals** (for the next year) directly in the evaluation rating form
- Future Goals will automatically default as **Current Employee Goals** in the following year's evaluation

## Can Goals be changed?

- Managers will be able to edit, add, or delete goals in the **Current Employee Goals** section, before Rating begins
- Employees will also be able to add goals into the **Current Goals** section, before Rating begins
- Employees will electronically **acknowledge** current goals, before Rating begins

## How will the Goals be added for this first evaluation cycle?

- Since Current Employee Goals will not automatically default in this year, both **Employees & Managers** will be able to add goals into the Current Employee Goals section, before Rating begins

**NOTE: Goals will not factor in Overall evaluation score this year, but will weigh into Overall score on future evaluations**

# Dashboard

## What will you see on “My Dashboard”

- **Current or Overdue Tasks** requiring your action, for yourself or other employees
- Any **Evaluations** created for you (as an employee) in Perform.
  - **NOTE:** *Archived* Evaluations will always be accessible from the Employee Profile page.
- All **Direct Reports**
- A **Reports** section, including a graphical representation of evaluation data for your Direct Reports



Evaluation

My Tasks view all



Task	For Employee	Related To	Due Date
Quarterly check-in	Penny Lane	6 Month Probationary Review for Penny Lane [due 09/02/2020]	10/28/2020
Rating For Manager Neogov's TEST 2020	Manager Neogov	TEST 2020	11/04/2020
Rating For Sally Smith's 2020 Review Cycle	Sally Smith	2020 Review Cycle	11/26/2020
Rating For Tiana Moore's Annual Evaluation 2021	Tiana Moore	Annual Evaluation 2021	12/15/2020
Rating For Tiana Moore's Check-in	Tiana Moore	Check-in	02/13/2021
Check-in	Tiana Moore	Annual Evaluation 2021	02/28/2021
Rating For Ari Diaz's Test Eval 2020	Ari Diaz	Test Eval 2020	04/16/2021
Rating For Max Fisher's 2021 Annual Evaluation	Max Fisher	2021 Annual Evaluation	01/17/2022

My Evaluations view all

<p><b>Custom TEST PROGRAM (due 02 / 15 / 2023)</b></p> <p>Due: <b>Wed. Feb 15, 2023</b>      Completed: -          Status: <b>Before Ratings</b>      Type: <b>Periodic</b></p>	<p><b>Custom TEST PROGRAM (due 02 / 15 / 2021)</b></p> <p>Due: <b>Mon. Feb 15, 2021</b>      Completed: -          Status: <b>Approval</b>      Type: <b>Periodic</b></p>	<p><b>2020 Review Cycle</b></p> <p>Due: <b>Thu. Jul 02, 2020</b>      Completed: <b>Fri. Jan 29, 2021</b>          Status: <b>Completed</b>      Type: <b>Periodic</b></p>
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My Direct Reports

<p><b>Ari Diaz</b> HR Generalist</p> <p>0 Overdue Write Journal</p>	<p><b>Max Fisher</b> Agronomist</p> <p>0 Overdue Write Journal</p>	<p><b>Jason Goodwin</b> Customer Support Rep</p> <p>2 Overdue Write Journal</p>
<p><b>Eric Hoss</b> Budget Analyst</p> <p>1 Overdue Write Journal</p>	<p><b>Sara Lake</b> L2 Implementation Consultant</p> <p>0 Overdue Write Journal</p>	<p><b>Penny Lane</b> Analyst</p> <p>0 Overdue Write Journal</p>
<p><b>Bruce LeRoy</b> Budget Analyst 1</p> <p>1 Overdue Write Journal</p>	<p><b>Edith McDowell</b> Arborist</p> <p>2 Overdue Write Journal</p>	<p><b>[Avatar]</b> Customer Support Rep</p> <p>1 Overdue Write Journal</p>
<p><b>Linsley Oaks</b> Benefits Administrator</p> <p>0 Overdue Write Journal</p>	<p><b>Amy Pacifica</b> Benefits Administrator</p> <p>0 Overdue Write Journal</p>	<p>+7 view all Direct Reports</p>

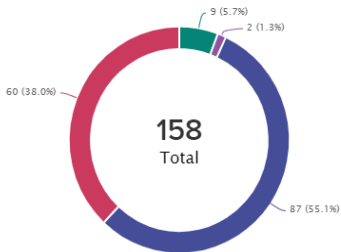
Journal Entries

Overdue Tasks

Active Evaluations & Overdue Tasks

Active Evaluations

- Approval
- Rating
- Before Ratings
- Draft

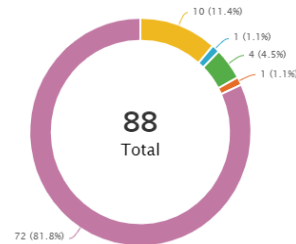


114 Evaluations Past Due Date

Go to all evaluations list >

Overdue Tasks

- Rating
- Approve and Sign
- Sign
- Approve
- Other



View all tasks >

Employee Name	Evaluation Name	Department	Status	Due Date
Danny Allen	Annual Review for Danny Allen [due 01 / 24 / 2020]	Operations	Draft	⚠ 01/24/2020
Danny Allen	Annual Review for Danny Allen [due 01 / 26 / 2020]	Operations	Draft	⚠ 01/26/2020
Hanna Kathryn	Annual Review for Hanna Kathryn [due 01 / 30 / 2020]	Human Resources	Draft	⚠ 01/30/2020
Hanna Kathryn	Annual Review for Hanna Kathryn [due 01 / 31 / 2020]	Human Resources	Draft	⚠ 01/31/2020

# Helpful Hints

NEOGOV PE Perform

Dashboard Employees Performance Evaluations Library Positions Administrative Reports Help

Yvonne Rodriguez

Help

- Dashboard
- Adding Goals
- Completing Tasks
- Creating Performance Evaluation
- Journal Entries
- Rating an Evaluation
- Signing an Evaluation
- Approving and Signing an Evaluation

My Tasks [view all](#)

29 Total	8 Rating	2 Approve And Sign	0 Sign/Refuse	17 Other	21 Overdue
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hide table

Task	Helpful Hints	Due Date
<input checked="" type="checkbox"/> Approve Content	<input checked="" type="checkbox"/> <a href="#">Go To Implementation Guide</a>	<span>⚠</span> 05/25/2020
<input checked="" type="checkbox"/> Add Content		<span>⚠</span> 06/24/2020
<input checked="" type="checkbox"/> Add Content		<span>⚠</span> 07/22/2020
<input checked="" type="checkbox"/> Meet with employee		<span>⚠</span> 07/29/2020



**Ongoing**  
:  
*(throughout the year)*

Managers & Employees add **Journal Entries** in system

**In April:**

Evaluations generated by HR, due May 31<sup>st</sup>

**Before Rating begins:**

Manager meets with employee to discuss Goals

Employee adds Goals for current review period

Manager adds Goals for current review period

Employee signs off on Goals for current review period

**Rating process:**

Employee submits self-review  
(45 days before eval due-date)

Direct Reports provide 360 feedback  
(45 days before eval due-date)

Manager submits review  
(30 days before eval due-date)

**Evaluation released electronically to employee**



**Approval process:**

Calibration meeting w/ Manager, HR & VP

HR Approves evaluation

Manager's Manager approves & signs

Manager meets w/employee to discuss review

Manager approves & signs

Employee signs



**Ongoing**  
:  
*(throughout the year)*

Managers & Employees add **Journal Entries** in system

**In June:**

Evaluations generated by HR, due March 30<sup>th</sup>

**Before Rating begins:**

Manager meets with employee to discuss Goals

Employee adds Goals for current review period

Manager adds Goals for current review period

Employee signs off on Goals for current review period

Manager conducts check-in with employee

**Rating process:**

Employee submits self-review  
(45 days before eval due-date)

Direct Reports provide 360 feedback  
(45 days before eval due-date)

Manager submits review  
(30 days before eval due-date)

**Evaluation released electronically to employee**



**Approval process:**

Calibration meeting w/ Manager, HR & VP

HR Approves evaluation

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Manager meets w/employee to discuss review

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Employee signs

# LIVE Demonstration

# Questions

