

Perform Resource Guide For

Employees

Maricopa County's

Online Performance Resource

Powered by NEOGOV



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Overview

This guide details how to navigate the Perform (PE) system as an Employee, covering how to complete various tasks, as well as some tips and tricks of the system. Also highlighted is how to receive assistance directly within Perform.

Before You Use This Guide

If not already activated through access to another NEOGOV product in use in Maricopa County (i.e. Onboard, Online Hiring Center), you must receive an activation link from a system administrator to activate your account by establishing a password. Once activated, you may log into your Perform account and complete any assigned tasks.

Who Should Use This Guide

This guide is intended for Employees.

Contacts for Questions

Please contact your Department HR Liaison should you have any additional questions.

Navigating the Dashboard

Who Should Use This Section

Employees should use this section to become familiar with the functionality of the dashboard.

Navigating to the Dashboard

Upon logging into Perform, you arrive at your **Dashboard**. The Dashboard is a central location from which all tasks can be completed in the system.

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Employees Library \lor Reports \lor	- Help - 1					4 🗈 + 🕓 🍤
My Tasks view all > 2						
1 Total	O Rating	O Approve And Sign	1 Sign	O Approve	O Other	Overdue
hide table \land						Q
Task			For Employee	:	Related To	Due Date
	on for Ziggy Alberts		Ziggy Alberts		Annual Performance Evaluation	11/13/2017
						1 - 1 of 1 items
My Evaluations view all of my e	· · · ·					
						d 194 9 X39403333

Figure 1: Dashboard

- 1. Dashboard Menu: Based on configuration you may see the following items on the menu bar:
 - a. The **Employees List**
 - b. The **Library**
 - c. Reports
 - d. Help
- 2. My Tasks: Contains all tasks requiring your action
 - a. Color-coded boxes located within this section can be used to filter the various task types.
- 3. **My Evaluations:** Displays your three most recent performance evaluations (if applicable).
- 4. Journal Hub: Contains all Journal Entries you have created, as well as any pending entries.
- 5. My Profile: Access your Profile, update your password, and sign out of Perform.

In-App Help

Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

Using In-App Guidance

There is a **Help** menu accessible to all users. Hover over the Help icon to view a list of common actions.

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mployees Library v Reports	✓ <u>Help</u> ✓					Ŧ	g + 🕒	
My Tasks view all >	Dashboard Adding Goals Completing Tasks							
1 Total	Journal Entries Rating an Evaluation Signing an Evaluation	O Approve And Sign	O Sign	O Approve	O Other		O Overdue	
nide table in the second se	Approving and Signing an Evaluation	J						Q
Task	Helpful Hints		For Employee	÷	Related To	¢	Due Date	-
🛠 Rating For Ziggy Alberts's Annual	Performance Evaluation	· · · · · · · · · · · · · · · · · · ·	Ziggy Alberts		Annual Performance Evaluation		03/01/2018	

Figure 2: Help

NOTE: The list of common actions depends on the user's security role.

Users can click on an action, and the system provides guidance on the relevant steps to complete that action, as well as provides a helpful description for each step. When a corresponding tutorial exists, an option to view it is also displayed. Select **Stop Guide** to stop the guided tour completely.



Figure 3: Stop Guide

When a tutorial begins to play, it is anchored in the bottom left of the screen. Change its placement by selecting the drop-down menu in the top left of the tutorial.

Employees Library ~ Report	s 🗸 Help 🗸		
Employees Library V Report	s v Help v		
My Tasks view all >			
wy lasks view an >			
1	1	0	0
Total	Rating	Approve And Sign	Sign
hide table A			
-			
Task			¢ For I
🔅 Rating For Ziggy Alberts's Ann	ual Performance Evaluation		Zigg
A riding for Eggy ridered rini			2.95
My Evaluations view allof	nv evaluations >		
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Annua Annual Ev	ny evaluations >	Annual I	Performance Evaluatio
Annu Annual Ev		Due: Tue, M	ay 01, 2018
Annur, Annual Ev	aluation (due 05 / 07 / 2018)	Annual I Due: Tue, M Status: Not	
ottom Left v ottom Kight po Left GOV	aluation (due 05 / 07 / 2018)	Due: Tue, Mi Status: Not S	ay 01, 2018
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Annu Annual Ev torm fait by Lift by Ban Tormet Tormet Tormet Tormet Tormet	aluation (due .05 / 07 / 2018)	Due Tae M Status Not S	ay 01, 2018

Figure 4: Tutorial Placement

NOTE: If you leave the page playing a tutorial, the tutorial closes and is not available on the next page.

Using Helpful Hints

Additionally, when you hover over the **Help** icon, there is a **Helpful Hints** toggle that can be enabled or disabled.

Employees Library v Reports v	Help ~					E.	a + 🕒	
My Tasks <u>view all</u> >	Dashboard Adding Goals Completing Tasks							
1 Total	Journal Entries Rating an Evaluation	O Approve And Sign	O Sign	O Approve	O Other		0 Overdue	
hide table A	Signing an Evaluation Approving and Signing an Evaluation							0
Task	Helpful Hints		For Employee	\$	Related To	¢	Due Date	•
🛠 Rating For Ziggy Alberts's Annual P	Performance Evaluation	6	Ziggy Alberts		Annual Performance Evaluation		03/01/2018	

Figure 5: Helpful Hints Toggle

If Helpful Hints are enabled, blue Helpful Hint icons display throughout Perform in areas where users might need more assistance.

NEOGOV Perform	~				Q, Search E	z 🛱 🗹 🧕 z	iggy Alberts 🗸 🕕
Employees Library v Reports	s 🗸 Help 🗸					0 🔁 +	Ŀ
My Tasks view all > 0							
1 Total	1 Rating	O Approve And Sign	O sign	O Approve	O Other	O Overdu	ie
hide table 🥎							

Figure 6: Helpful Hints

Click on a Helpful Hint to receive more information about that specific action. Depending on the Helpful Hint, the system may refer the user to other related hints, or it may offer a description and the corresponding tutorial (if applicable). View the tutorial by selecting **Watch Video** or close the Helpful Hint description by selecting **Close**.

My Tasks <u>view all</u> >	
My Tasks Here, you can find all the tasks that require your attention. To see other tasks assigned to you, use the "view all" link.	4 Approve And Sign
Close Watch Video	

Figure 7: Helpful Hint Details

To turn off the Helpful Hints, hover over the Help icon and disable the Helpful Hints.

My Tasks

Any current tasks that require your action appear in **My Tasks**. You can filter on each status by selecting a task type and the list below will filter accordingly.

My Tasks <u>view all</u> > 1							
1 Total	O Rating	O Approve And Sign	1 Sign	O Approve	O Other	0 Overdue	
ide table in the second s							C
Task			For Employee	\$	Related To	\$ Due Date	
	uation for Ziggy Alberts		Ziggy Alberts		Annual Performance Evaluation	11/13/2017	

Figure 8: My Tasks

- 1. View All: Select this to view tasks that are Current, Completed, Canceled, Pending, and Skipped
 - a. Current: Tasks currently requiring action.
 - b. **Completed:** Tasks you have already acted on.
 - c. Canceled: Tasks no longer required.
 - d. Pending: Tasks pending another user's action or tasks for Draft evaluations
 - e. **Skipped:** Tasks that had been assigned to you, but skipped by Department HR Liaison.
- 2. To complete a task, select the task to be redirected to the task for completion.

- a. The task types are designated as follows:
 - i. Total: All tasks currently requiring your action.
 - ii. Rating: Any task required on a self-evaluation or a peer-rating task, if configured.
 - iii. Approve and Sign: Task to approve and sign an evaluation after it has been rated.
 - iv. **Sign:** Task to acknowledge an evaluation plan before rating begins or to sign an evaluation after rating has been completed.
 - v. Approve: Task to approve an evaluation after it has been rated.
 - vi. Other: Any other manual task.
 - vii. **Overdue:** Any task with a past due date.



To filter the list of tasks, click on any of the color-coded boxes. For example, if **Sign** is selected, all signature related tasks display in the list.

The following legend is used to identify actions that can be taken from the Dashboard:

☆	= Rate an evaluation
Ø	= Approve and sign
₩	= Sign
\odot	= Approve an evaluation
Y	= Other or Manual tasks
$\langle \mathfrak{I} \rangle$	= Recurring Manual task
鼤	= Recurring Check-In
C.	= Recurring Journal Entry
Figure 9: Task L	egend

My Evaluations

Underneath the tasks section of the Dashboard is the **My Evaluations** section. Displayed are your three most recent performance evaluations (if applicable). Select any one of the evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation.



Figure 10: My Evaluations

To view all historical evaluations, select **view all of my evaluations**. To view the evaluation detail page of a specific evaluation, select the title of the evaluation.

Journal Hub

All Perform users have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you by others).

For more information on how to navigate the Journal Hub, refer to the Journal Entry section of this guide.

My Profile

To access your **Profile** page, hover over your name in the top right corner. Select **My Profile**.

NEOGOV	📴 Perform 🗸 🗸				Q Search		Ziggy Alberts 🗸 🗸
Employees Librar	y ∨ Reports ∨ Help ∨						i + ©
	Ziggy Alberts Recruiting Intern Employee Details	S I Human Resources Operation Evaluations Additional Info		nent Plans Doc	uments	Old Page 🗐 Jo	urnal Entries 0
	Employee Details						
	Employee Information				About Me		
	POISTION Recruiting Intern	DEPARTMENT Human Resources Operations	DIVISION Human Resources		Tell us something about yours	elf 🖉	
	CLASS SPEC	ADDRESS AL	EMAIL ziggy@neogov.net		Hierarchy		
	START DATE 09/21/2016 PHONE NUMBER 888-888-8888	seperation date 09/30/2016 active Yes	EMPLOYEE NUMBER 1019 ONLINE ACCESS Activated	0	Nicole Stan HR Admin Deborah Day Reculting Manager		
	Work History			+ Add Work	You Recruiting Intern	View Company	
	Add	your work experience including any co	ntracts here		Strengths ①		EL
	Education		+	Add Education	Your highest-rated competencies will be shown performance evaluation is comp		FEEDBACK & HELP
		Add any prior or continuing educa	tion				
					Skills	+ Add Skills	
چ ا					Showcase your skills and skill l	evel	Q

Figure 11: Talent Profile

Here you can see your **Employee Details**, **Evaluations**, **Additional Info**, **Tasks**, **Development Plans**, and **Documents** that are associated to you.

NOTE: you can also add Journal Entries from this page. For information on adding entries refer to the Journal Entry section of this guide.



You cannot edit any of your Employee Information, such as position, email address, etc. If you need to update your information, please contact your Department HR Liaison.

To navigate to each section of the Profile, select the section title at the top, or scroll down the page.



Figure 12: Talent Profile – Sections

Journal Entries

Who Should Use This Section

Any user logging and sharing their journals throughout the year. Journal Entries are an easy and effective way to take notes of accomplishments throughout the year for yourself.

Navigating to Journal Entries

There are several ways to log Journal Entries in Perform. Entries can be created from the **Journal Hub**, from the **Dashboard**, and from the **Profile**. Entries can even be **emailed** directly to Perform!

Adding Journal Entries via the Journal Hub

All Perform users have access to their **Journal Hub**. The Journal Hub is a central location where users can find all Journal Entries that you have created or have access to (those shared with you by others).

The Journal Hub icon is always accessible to the user, no matter what page is being viewed in Perform.

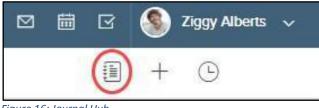


Figure 16: Journal Hub

Select the Journal Hub icon and a fly-out displays the Journal Entries Hub.

Journal Entries Hub Current Pending		6 Close
 marks a required field Who is this entry about? * 		
3 Start typing here to find an employee	٩	
4 B I <u>U</u> := := ∞ 𝒫		
	5 Save	
	Select an employee in the dropdown above to view their journal entries here.	

Figure 17: Journal Entries Hub Fly-Out

- 1. **Current**: Journal Entries successfully posted are found in the Current tab.
- 2. **Pending**: Journal Entries unsuccessfully posted can be found and corrected in the Pending tab.
 - a. Once corrected, the Journal Entry is posted to the Current tab.
- 3. Who is this entry about?: Employee will type in their name to submit their own Journal Entry.
- 4. **Body of Journal Entry**: Utilize the rich text editor when entering the text of your Journal Entry.
 - a. One attachment can be included (5MB max size).
- 5. Save: Select Save to post the Journal Entry.
- 6. **Close**: Select Close at any time to close the fly-out and return to the previous page. Any unsaved Journal Entries will be lost.

The following is what it looks like to log a Journal Entry from the Journal Hub.

Journa	al Entrie	s Hub	Close
Current	Pending		
		* marks a required field	
	1	Who is this entry about?*	
	2	I conducted the first check back meeting and survey and it went really well @ad Item Evaluation Adeptability Probationary 2017 PE Evaluation (due 07 / 24 I / 2018)	
	3	© Current - 3 entries Select All Actions Y	
		Ziggy Alberts lest edited 11/2017 09:4836 AM Series Literated a lot of new skills and tactics.	
		Ziggy Alberts last edited 11/2017 09:48:33 AM vI was able to implement new Check. Back processes for New Hires. Managers now have 30 day, 60 day, 90 day, 180 and 365 day check ins with their new hires to make sure that new hire is comfortable and making progress with their position.	
		Ziggy Alberts last edited 11/20/17 09:48:23 AM	Q

Figure 18: Creating a Journal Entry

- 1. Enter your name.
- 2. Use the Rich Text Editor to enter the Journal Entry and style as necessary.
 - a. You can add one (1) attachment to each Journal Entry (max 5MB).
 - b. To tag a **Competency or goal**, enter '@' and type the desired competency or goal. A list of matching items appears. Select the correct goal or competency. This assists in searching for this particular Journal Entry when rating.
- 3. Use the menu to toggle between **Current** entries and **Archived** entries.
- 4. You can share, archive, delete and edit your entries.
 - a. To share, select the blue people icon 🔕
 - b. You can share Journal Entries you create for yourself with your Manager and your Manager's Managers.
 - c. Archive a Journal Entry by selecting the archive icon 🖾 to de-clutter the system, making it easier to search through feedback entries
 - i. Once archived, the entry moves from your current list to the archived list. An archived entry is not available for selection by a rater during rating.

Ì

- ii. To unarchive, select the unarchive 👘 icon
- iii. To **delete** entries you created, select the trash icon 🕮
- d. To **edit** your entry, select the pencil icon
- 5. Use the Actions menu to Archive, Delete, Print with Attachments, and/or Print without Attachments.
- 6. Once you have added all comments, attachments, and tagged evaluation items, select Save.



Archived Journal Entries can be unarchived from the Archived tab

Adding Journal Entries via Email

Users can create Journal Entries simply by sending an email. Instead of logging into Perform to create Journal Entries, employees can send an email, and its contents automatically create a Journal Entry within Perform.

This is very useful for employees who work in the field and cannot log into Perform as regularly as those who might work from an office, as Journal Entries can be easily created by sending an email from a mobile device.

Employees must send the email from the email address that is used for their Perform account.



Figure 19: Emailing Journal Entry

To send an email to a Journal Entry follow these steps:

- 1. Address the email to journals@neogov.net
- 2. Enter <u>only</u> your name on the email's subject/title line. . The spelling of your name must match exactly the spelling of it in Perform.
- 3. Whatever is written in the body of the email automatically creates as a Journal Entry once the email is sent.
- 4. Enter the phrase <u>End Journal</u> after the last sentence in the email. This prevents any signature lines from being added to the Journal Entry once it is created.
 - a. End Journal is not visible in the Journal Entry once it is created.



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

Currently, tagging and sharing features are not supported when creating a Journal Entry via email. However, once the Journal Entry is created, the tagging and sharing actions can be added within Perform.

Once the email is sent, the Journal Entry is created in Perform and is accessible from the Journal Hub. Any Journal Entries that are error free will automatically post and are available in the **Current** tab.

Journa	Entries Hub	Close
Current	Pending 2	
	* marks a required field Who is this entry about? *	
	Ziggy Alberts Q	
	B I U H H I I I I I I I I I I I I I I I I	
	Save	
	Ocurrent ▼ 6 entries Select All X Actions Y	
	Image: Siggy Alberts last edited 12/01/7 12:50:14 PM Image: Siggy Alberts Image: Siggy Alberts <th></th>	

Figure 20: Current Tab – Journal Hub

Any Journal Entries that contain errors display in the **Pending** tab. Journal Entries within the **Pending** tab have not yet been successfully posted. The error is listed next to each Journal Entry with the ability to correct it. Once errors are corrected, the entry is successfully posted to the **Current** tab.

Journa	al Entries	Hub	Close
Current	Pending 2	1	
		2 entries	
		\[\begin{tabular}{lllllllllllllllllllllllllllllllllll	
		Ziggy Alberts — last edited 12/05/17 04:35:12 PM I received some great feedback from community members last week. See attached.	
		Attachments Only one attachment per Journal Entry is allowed. Please, remove excessive attachments.	

Figure 21: Pending Tab – Journal Hub

- 1. The **number of pending Journal Entries** display on the Journal Hub icon from the dashboard and the Pending tab.
- 2. The error message for each pending Journal Entry appears.
 - a. All possible errors are listed.
- 3. Select the pencil icon to edit and **correct** a pending Journal Entry or the trash can icon to delete it.
- 4. Pending Journal Entries can be **deleted** in bulk using the Actions tab and marking the checkbox next to each entry to be deleted.

There are six different types of errors. Each error generates a "bounce back" email (with the exception of one), which lets the employee know there is an error and how to correct it. The "bounce back" email includes a link to the employee's Journal Hub.

NOTE: Please do not reply to the "bounce back" emails.

The six types of errors are:

- User not found when the name of the employee in the subject/title does not exactly match an employee's name in Perform.
- *Unsupported attachment format* when Perform does not support the format of the attachment submitted with the email.
- *More than one attachment* when multiple attachments are sent with the email; only one attachment per Journal Entry is permitted.
- *More than one employee with the same name* when there are multiple employees in Perform with exactly the same name as the employee in the email's subject/title.
- Security restriction when the person who sent the email does not have access to create a Journal Entry for the employee in the email's subject/title.
- *Email address of the sender does not exist* when the sender's email does not exist in Perform the journal is not created. **No bounce back email** is sent to the invalid sender.

NOTE: Once the pending Journal Entry is corrected, it posts and is made available within the Current tab.

Adding Journal Entries via the Profile

Navigate to your **Profile** page by hovering over your name in the top right corner and select **My Profile**.

From your **Profile**, select the **Journal Entries** button, in the top right corner.

Employee De	tails Evaluations Additional Info	o Tasks Development Plar	ns Documents
Employee Details			
ployee Information			About Me
POISTION	DEPARTMENT	DIVISION	Tell us something about yourself
Recruiting Intern	Human Resources Operations	Human Resources	
CLASS SPEC	ADDRESS	EMAIL	
2	AL	ziggy@neogov.net	Hierarchy
START DATE	SEPERATION DATE	EMPLOYEE NUMBER	
09/21/2016	09/30/2016	1019	Nicole Stan
PHONE NUMBER	ACTIVE	ONLINE ACCESS	i ne some
888-888-8888	Yes	Activated	Deborah Day Recruiting Manager

Figure 22: Talent Profile – Journal Entries

A fly-out appears with all Journal Entries you created previously.

Completing Tasks

Who Should Use This Section

Any employee who has a task(s) to complete.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, click on the **NEOGOV logo** in the top left corner. **My Tasks** displays any current or overdue tasks that require your action.

In this example, the employee must complete a **Before Rating Step Acknowledgement Task by signing the** evaluation.

NOTE: Acknowledgement tasks re-trigger when changes are made to the evaluation.

nployees Library v Report	s v Help v					+ •
1 Total	O Rating	O Approve And Sign	1 Sign	O Approve	O Other	0 Overdue
le table 🥎			For Employee	¢ R	stated To	Due Date
Sign Annual Performance Eval	luation for Ziggy Alberts		Ziggy Alberts	A	nnual Performance Evaluation	11/14/2017
						1 - 1 of 1 item

Figure 23: My Tasks – Completing a Task

- 1. Click the corresponding Task Name from the list. One type of task is a Signature task
 - a. In this example, Employee Ziggy Alberts must acknowledge the evaluation by **Signing** the evaluation before rating begins.

NEOGOV 📴 Perform 🗸		Q. Search	🖾 🗐 🖾 🧕 Ziggy Alberts 🗸
Employees Library ~ Reports ~ Help ~			H + (5)
Before Ratings			
Ziggy Alberts Recruiting Intern	EXCLUSION NAME Annual Performance Evaluation	doe gave Thu, Mar. 08, 2018	2 Sign
Content			Collapse All Sections
Core Competency	ENCY SECTION I 2017 RATING SCALE I SECTION WEIGHT 33:34 %		Collapse Section
Strengths	Competency		
Organizational Wide Goals	Description		Weight
ALL SECTIONS	Adapts to handle unexpected challenges. Res	ponds positively to changes in direction and priorities; respons	ibilities or assignments. 33.34%
Attention to	Detail Is thorough and accurate in all assignments. D	iligently attends to details and maintains a high degree of qual	ity in one's work. 33.33%
Communic	ation Skills Possesses good verbal and written communic	ation skills. Articulates thoughts clearly and effectively.	33.33%
essay se Stren	CTION I TEXT ONLY gths		Collapse Section
Name	Description		
Accomplish	iments		
	TION 1 2017 BATING SCALE 1 SECTION WEIGHT 33 33 %		Collepse Section

Figure 24: Completing a Task – Signing an Evaluation

- 1. **Content**: Select any section to view the items
- 2. Once you have reviewed the evaluation, select the Sign icon

Sign	Cancel Submit
Comments	
Write comment here	
	li li
Please sign your name below	
Ziggy A	lberts
Ziggy Alberts	November 14, 2017
Auto-Generate Draw Signature	

Figure 25: Sign

A fly-out appears for any additional comments, and a space for you to **Sign or Auto-Generate** signature. Select **Submit** once complete.

Once submitted, a green success banner appears at the top of the screen. The evaluation is sent to the next user in the process.



In this example, the next task that has become current for the employee is a **Recurring Journal Entry** task. Navigate back to your dashboard via the **NEOGOV logo** in the upper left-hand corner.

NEOGOV 👖 Perfo	Journal Entries for Ziggy Alberts	Close
Employees Library		
My Tasks <u>view all</u> >	Fields are required.	
1 Total		
hide table 🔿		
Tank		
Log a Journal Entry	Cancel Seve	
My Evaluations view al	© Current ~ 0 entries Select All & Actions 7	
Annual Perfor Doe: Thu, Mar 08, 20 Status: Net Started	No Results Found	
NEOGOV		
~		

Figure 27: Recurring Journal Entry Task

- 1. Select the Task Title and a fly-out appears.
- 2. Add your comments and select Save.

Once saved, a green banner appears indicating the task has been successfully completed. Since in this example it is a recurring task, it stays on the dashboard. Once the next due date for the recurring task approaches, depending on HR configuration, you may receive a reminder notice to log your next Journal Entry. Once rating has begun, the recurring task disappears.

Signing an Evaluation

Who Should Use This Section

When an evaluation has been completed by all parties, including raters and approvers, employees are required to **sign** the evaluation acknowledging it was received and reviewed.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select the **NEOGOV logo** in the top left corner. **My Tasks** displays a task to **Sign** the completed evaluation.

Click the Sign task from the task list on your Dashboard.

NEOGOV	PE Perform	~			Q S	sarch		ප 🧕 Ziggy Alberts 🗸
Employees Library	Help ~							H + ©
My Tasks view	all >							
1 Total		O Rating	O Approve And Sign	1 Sign	O Approve	O Other		O Overdue
hide table 🔨								Q
Task				For Employee	:	Related To		Due Date
Sign Annual E	valuation Program	m for Ziggy Alberts		Ziggy Alberts		Annual Evaluation Program		05/05/2018
								1 - 1 of 1 items
My Evaluation	5 view all of m	ny evaluations >						
Annu	al Evaluation							
NEOGOV							COP	PYRIGHT © 2010 - 2017
- VP								0

Figure 40: After Rating Signature Task

NEOGOV 📴 Perform 🗸			Q. Scor	ch 🛃 🖬 🖸 🧕 Ziggy Alberts 🗸
Employees Library Help ~				E + ©
After Ratings				
Ziggy Alberts Human Resources Assistant	eveluation nave Annual Evaluati	on Program	Mon. May. 07, 2018	④
Rating Summary				View Other Approvers >
		Score 3.25		
Siggy Alberts Human Resources Assistant		Total Score 3		Weight 0 %
William Lee HR Director		Total Score 3.25		Weight 100 %
	臣 Rating De	tails all Rating Ch	art (2)	
SECTIONS 1				Collapse all sections A
Organizational Competencies	COMPETENCY SECTION 15-POINT AND N/A SCALE I SECTION WEIGHT 10 Organizational Competencies	05		Collapse Section
Future Goals	Business Acumen Understands business implications of decisions. Aligns work with strategic g	pais.		ITEM WEIGHT 25 %
Improvements and Achievements	S Ziggy Alberts	3 Meets expectations	Met with the HR team to revemp the various policies	all employees have to acknowledge yearly.
ALL SECTIONS	🔞 William Lee	Exceeds Standards	Completed all goals that align with the strategic goal	is of the agency.
	Commitment Committed to exceeding standard expectations in carrying out one's job func	tion. Expresses a desire to make a meaningful	difference.	ITEM-WEIGHT 25 %
je je	Siggy Alberts	3 Meets expectations		rrelated to my day to day activity because I am committed to

After clicking Sign task, the After Ratings Form is displayed.

Figure 41: After Ratings Form – Signature Task

- 1. Navigate through the various **Sections** by clicking on the name.
 - a. Scroll through each section to review the ratings and any comments provided.
- 2. Toggle between the **Rating Details** or the **Rating Chart**
 - a. The Rating Chart displays a bar graph of all raters.
- 3. To view other approvers and the status of their task, select **View Other Approvers.**
 - a. A fly-out appears with all other approver information.
- 4. Once you have reviewed the completed evaluation, select the **Approve & Sign** button to complete the evaluation.
 - a. A fly-out appears with the signature box and a comment section.

Once you have signed the evaluation, an **Evaluation Acknowledged** banner appears at the top of your screen. If there are no other approvers/signatures in the process, the evaluation status changes to **Completed**. If other approvers exist in the process, the next party receives a task to complete the process at which time the evaluation status changes to **Completed**.

IMPORTANT: By selecting Deny instead of Approve & Sign, you are requesting a higher review. You must provide on a separate document a detailed description of the specific items/areas (i.e., goal, competency, rating or comment) for which higher consideration is requested and attach it to the evaluation in the Notes/Attachments section. Only after you have attached documentation, select the Deny button. Your request will be routed to your Manager who is responsible for facilitating the higher review process according to the department's established business practices.

Additional Helpful Information

Any employee who is a new or avid user of the Perform system. This section covers best practices within the system.

Trouble Shooting Browsers

All users are highly encouraged to use one of three supported browsers:

- Google Chrome
- Internet Explorer 11 or higher
- Microsoft Edge

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered are unlikely to be resolved.

If you encounter any issues, the first step in trying to resolve the issue would be to clear the browser's *cookies and cache*. To do so, select:

• Ctrl + Shift + Delete

This simple fix solves most user issues. If this does not fix the issue, try using a different supported browser. If you are still encountering the issue, please take any relevant screen shots of the issue, such as an error message, and send this to your Department HR Liaison. Include as much information as possible.

If you forget your password or username and use the Forgot Password or Username links, please check your spam inbox as sometimes the emails get filtered into there. If the email is not in there, please report to your Department HR Liaison.

FAQs

1. Where can I view my completed evaluation?

Once an evaluation has been released to you, you can view the evaluation from the Performance Evaluation Detail page. To view your score, ratings, and comments from Raters and Approvers, click on the Print icon.

2. Where can I reset my password or username?

When logging in to NEOGOV, there is a Forget Password and Forget Username link. Select the appropriate link and follow the directions. If you want to change your password, you can click the drop-down list associated with your name in the upper right-hand corner > Account Settings and enter the new password. The original password must be input first before changing. Please note that your account must be activated in order to reset your password or username. If your account has not been activated, please contact your HR Admin.

3. Where can I find out what browser I am using?

To find out what browser you are using, go to https://www.whatsmybrowser.org/

4. How do I add a note or attachment to my evaluation?



When presented with the task to review Evaluation, if after reviewing the Employee wants to add a note or attachment (e.g., documentation to support a request for higher review), he/she should access the evaluation from the My Evaluations section. Accessing from the My Evaluations section rather than from the task item allows the Employee to add a note and/or upload an attachment.

5. How do I request higher review?

When presented with the task to review Evaluation, if after reviewing the Employee wants to request higher review, he/she should first access the evaluation from the My Evaluations section. Accessing from the My Evaluations section rather than from the task item allows the Employee to upload a document containing the required justification as an attachment with a note for the Manager. Thereafter, Employee selects the Approve and Sign option at which point they can choose Deny. Choosing Denial (with required comment "Requesting Higher Review" entered by the Employee in the comment box), will trigger the Evaluation to be routed back to the employee's Manager for processing of the higher review according to established department practices. The Manager will receive an email notification advising him/her of the denial.

The Manager is responsible for facilitating the request for higher review according to established department practices. After higher review determination is made, the Manager will record the outcome of higher review consideration by uploading documentation as a further Note/Attachment to the Evaluation. Thereafter the Manager releases the evaluation for the second time to the Employee. Employee then Signs & Approves. After Employee's signature, evaluation is routed back to Manager for final signature. At which time the Evaluation is considered complete.