Perform Resource Guide

For

Employees

Maricopa County's

Online Performance Resource

Powered by NEOGOV

Table of Contents

NEOGOV

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.

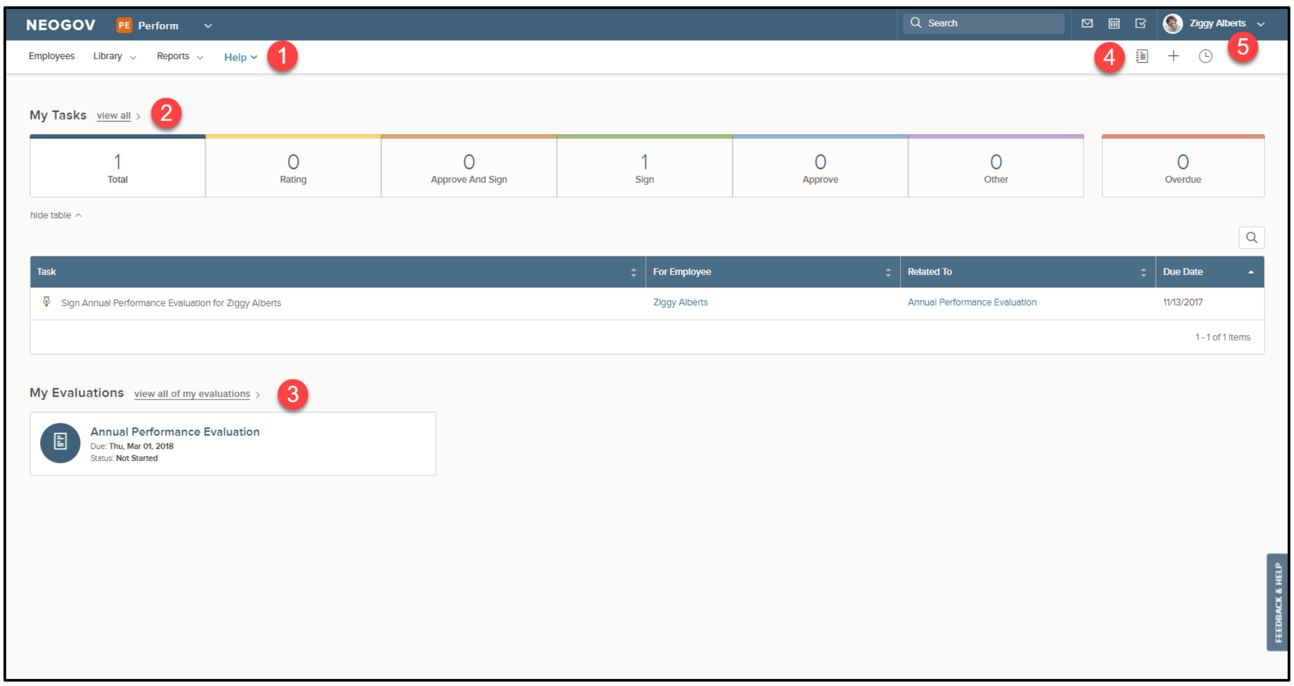

Figure 1: Dashboard

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.

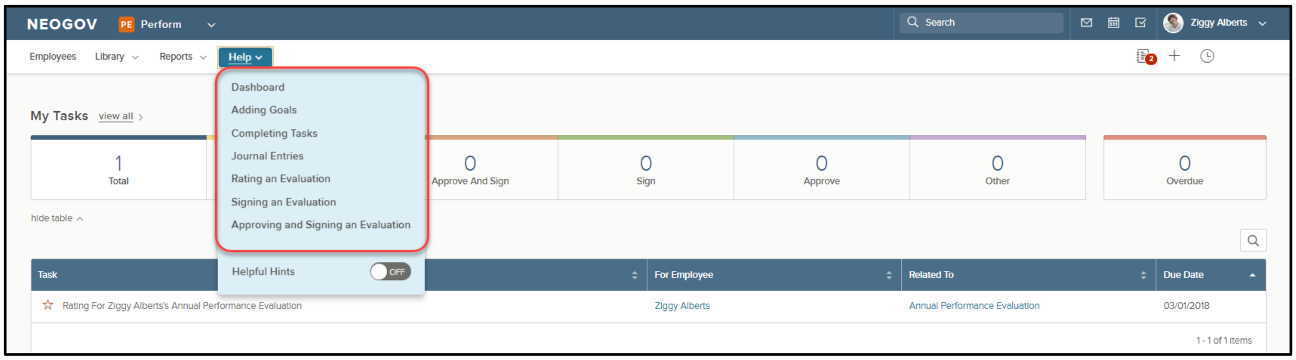

Figure 2: Help

<u>NOTE:</u> 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.

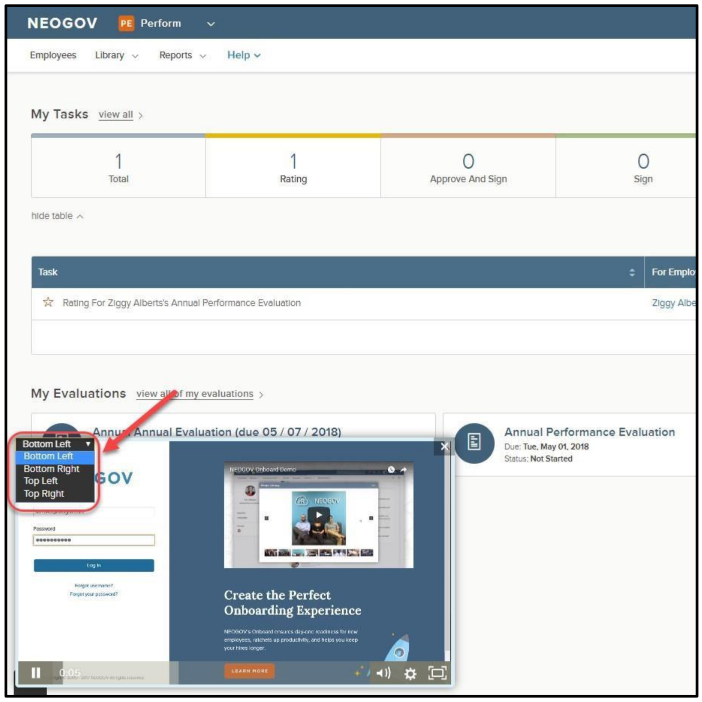

Figure 4: Tutorial Placement

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.

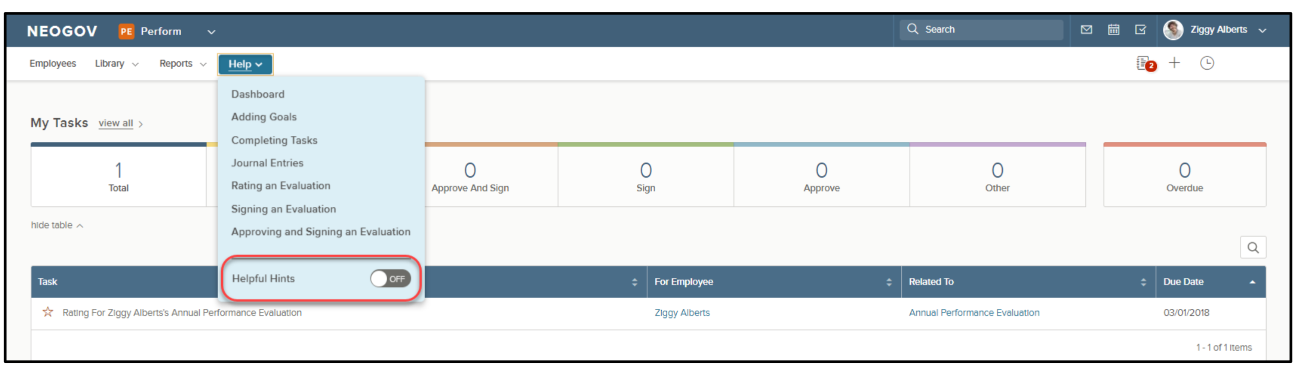

Figure 5: Helpful Hints Toggle

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

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**.

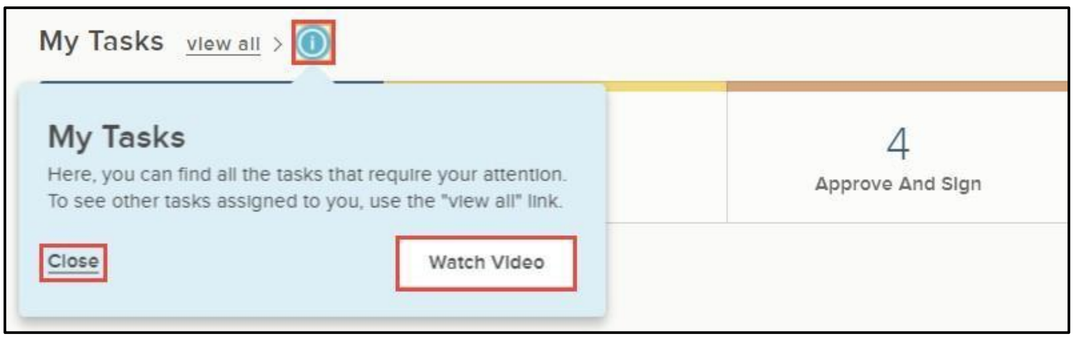

Figure 7: Helpful Hint Details

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.

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.

TIP!

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
	= Approve and sign
	= Sign
	= Approve an evaluation
	= Other or Manual tasks
	= Recurring Manual task
	= Recurring Check-In
	= Recurring Journal Entry

Figure 9: Task Legend

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**.

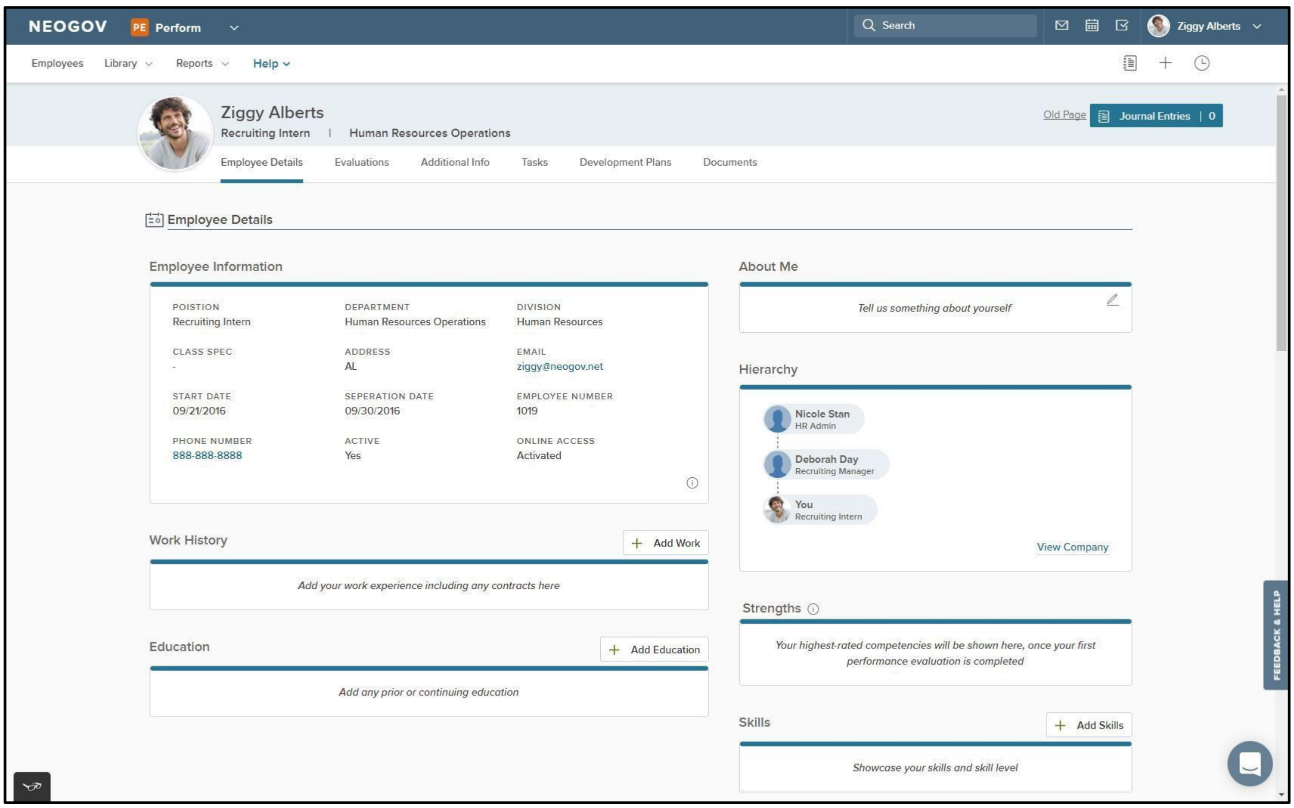

Figure 11: Talent Profile

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.

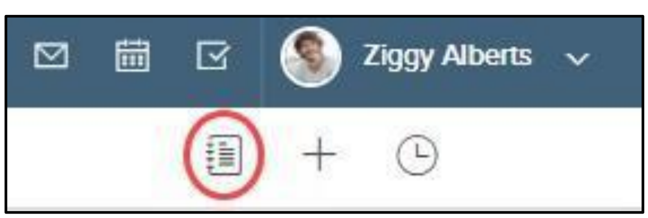

Figure 16: Journal Hub

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

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.

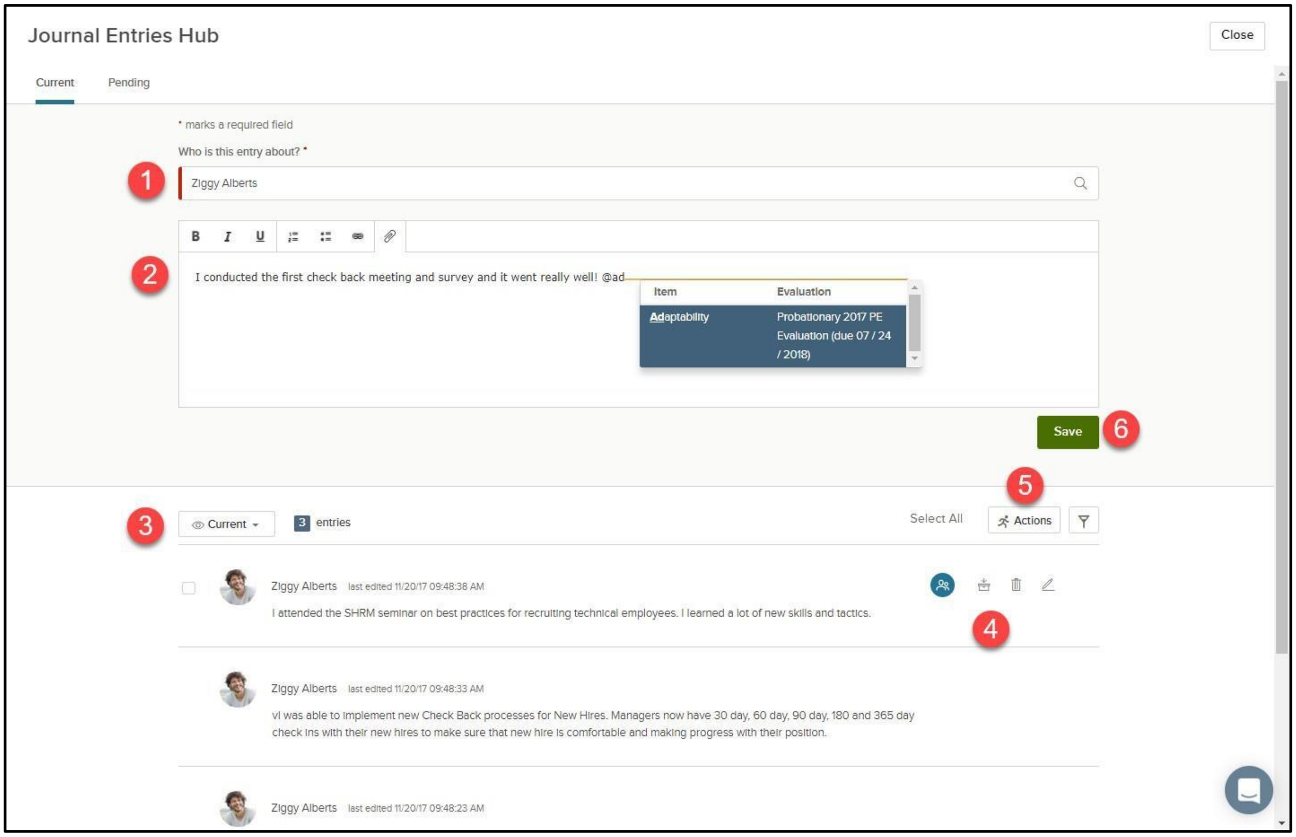

Figure 18: Creating a Journal Entry

1. Enter your n**ame.**
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.
      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.**

TIP!

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.

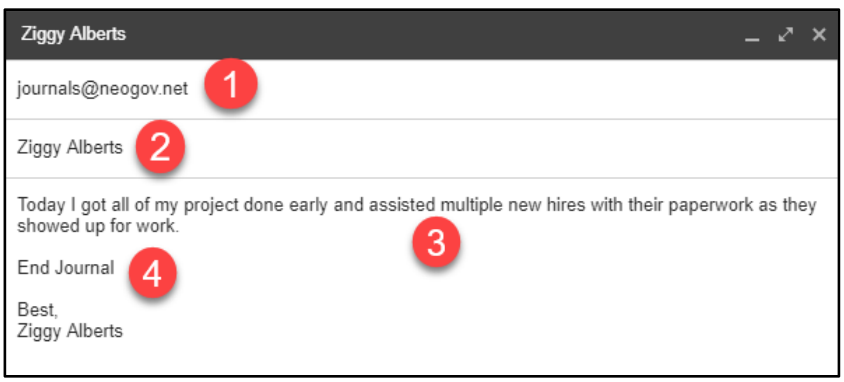

Figure 19: Emailing Journal Entry

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

1. Address the email to **journals@neogov.net**
2. Enter only 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 End Journal 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.

TIP!

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.

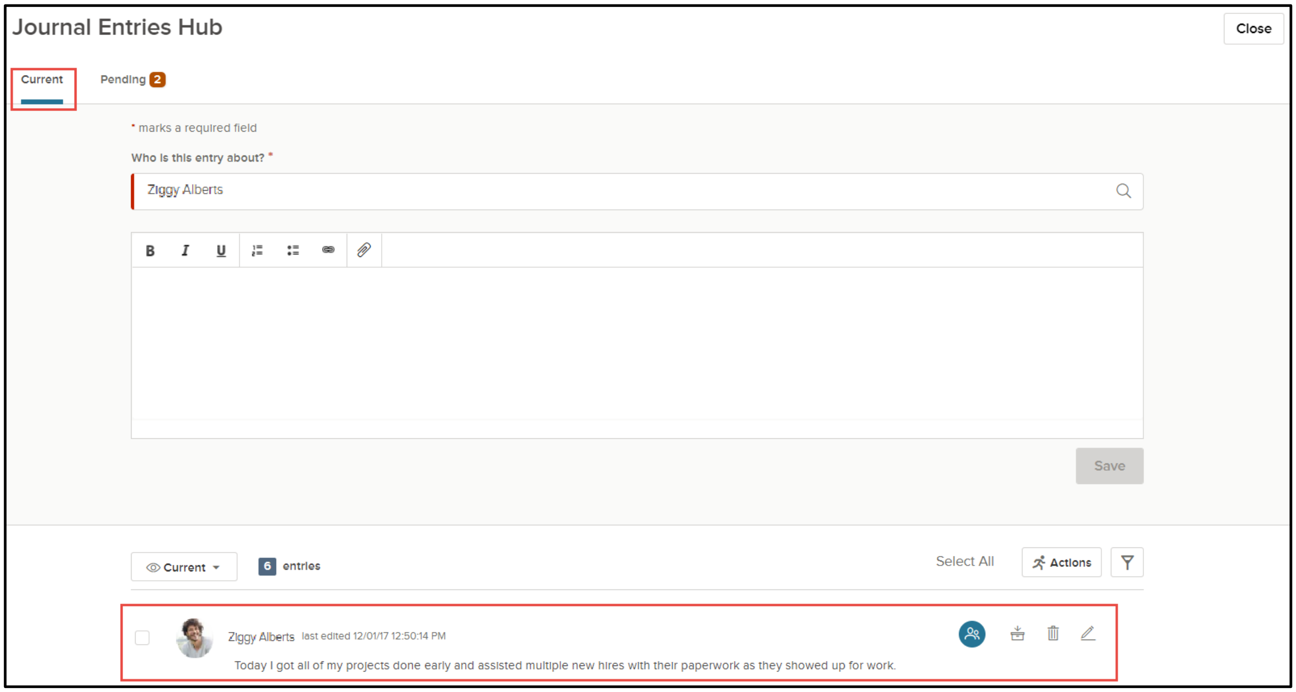

Figure 20: Current Tab – Journal Hub

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.

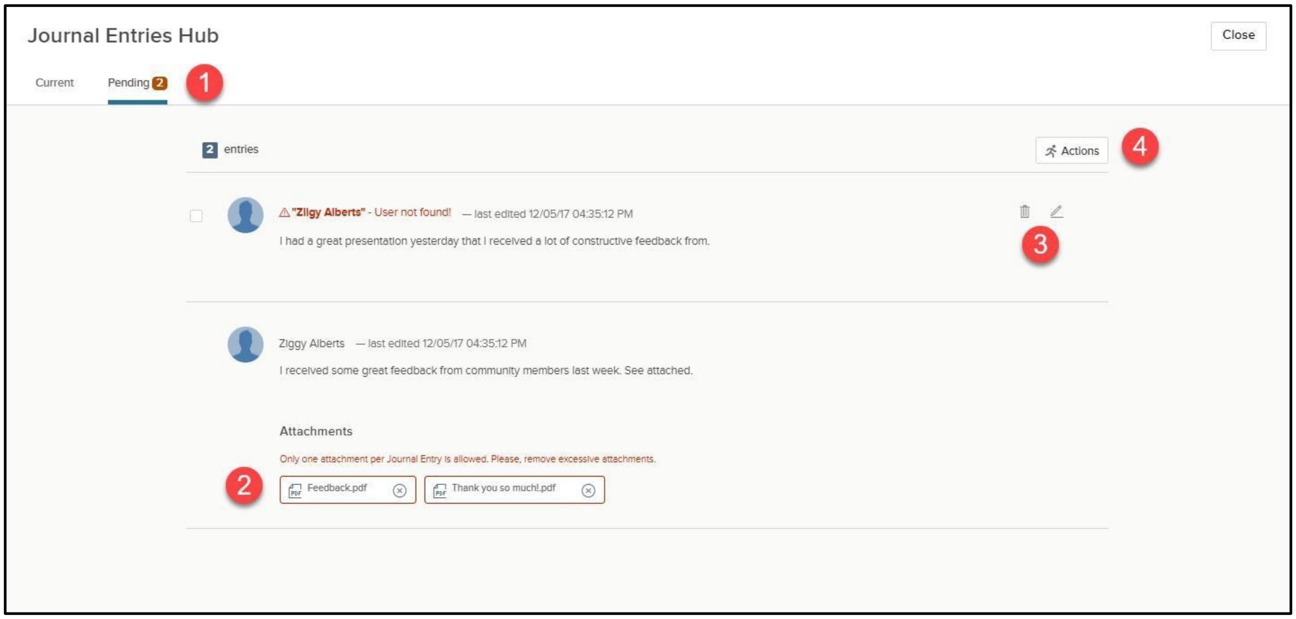

Figure 21: Pending Tab – Journal Hub

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.

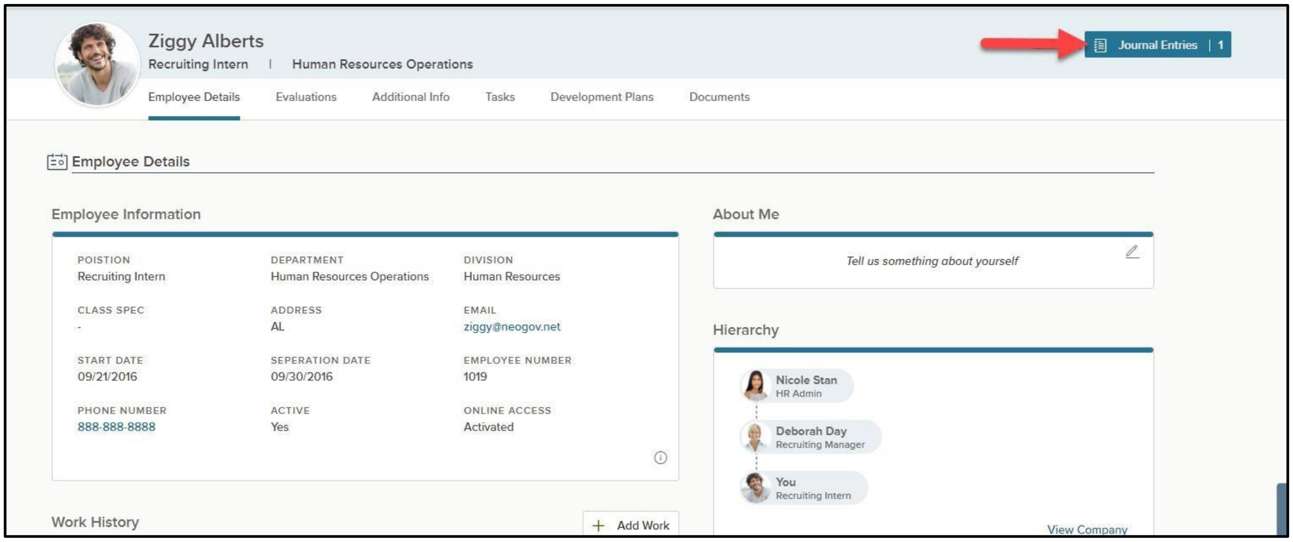

Figure 22: Talent Profile – Journal Entries

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.

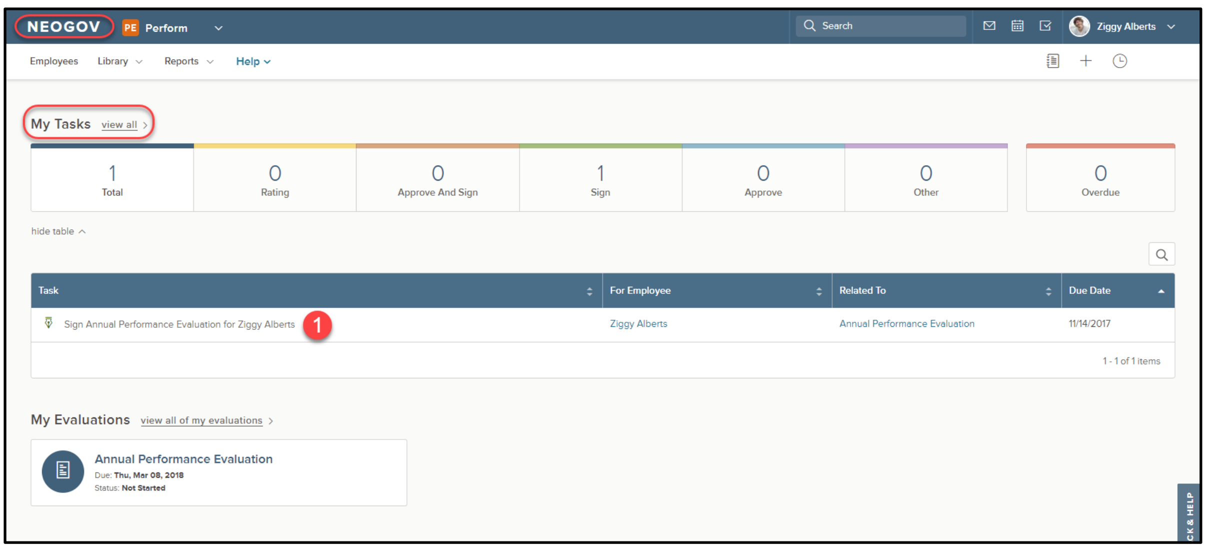

Figure 23: My Tasks – Completing a Task

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.

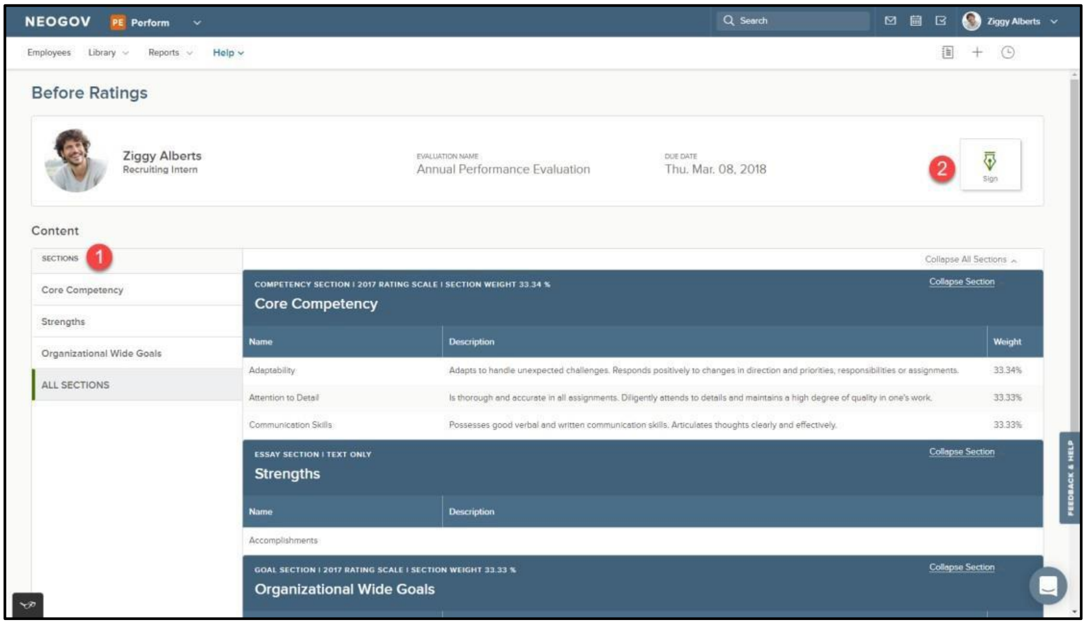

Figure 24: Completing a Task – Signing an Evaluation

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

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.

Figure 26: Green Success Banner

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.

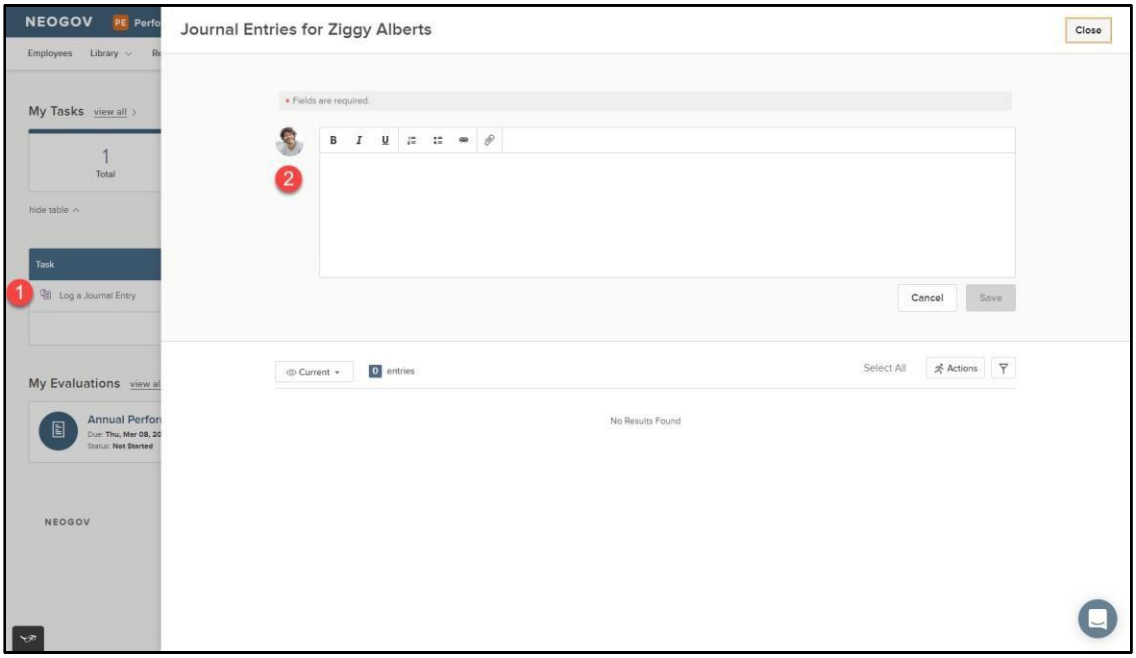

Figure 27: Recurring Journal Entry Task

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.

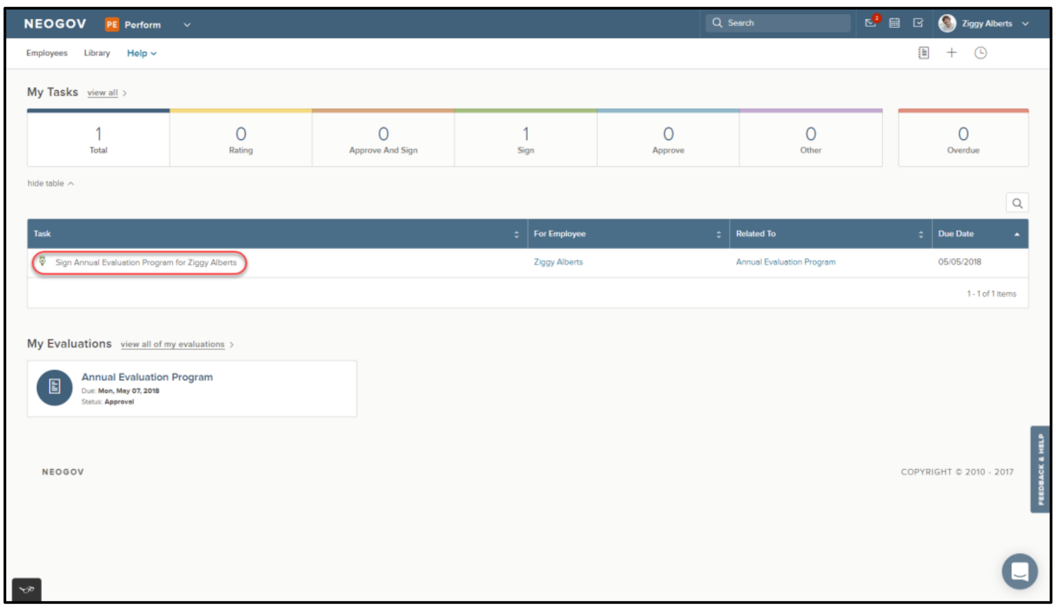

Figure 40: After Rating Signature Task

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

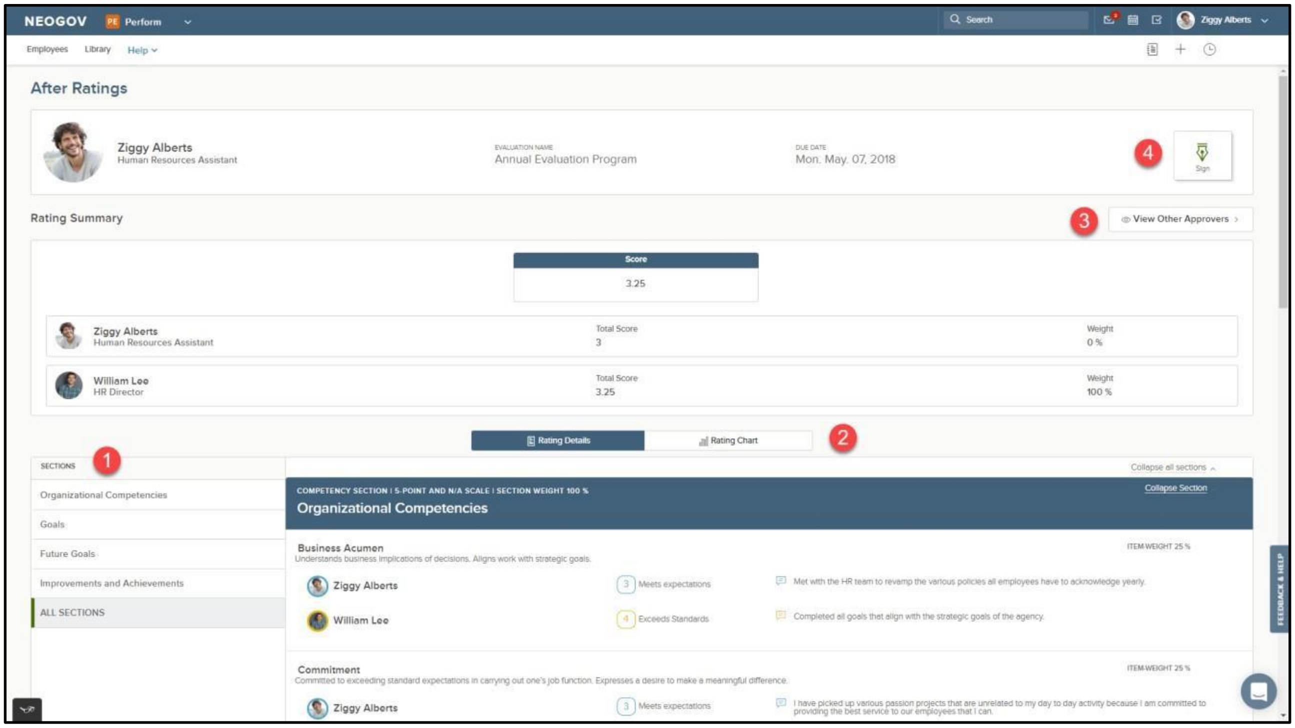

Figure 41: After Ratings Form – Signature Task

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.