City of Flagstaff
NEOGOV – PERFORM
Employee User Guide
November 2020

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PERFORM: OVERVIEW

Perform is a cloud-based application through NEOGOV which the City will use for all employees' evaluations. This training guide is to help you navigate the system while completing assigned evaluations and tasks. There are also some tips and tricks of the system shown in this guide. You will also learn how to receive assistance
directly within Perform.

City of Flagstaff employees will complete evaluations electronically in **Perform**. New hire non-exempt (hourly) employees will receive their first performance evaluation no later than their six-month anniversary date. Additionally, all employees will complete an annual review 30 days after their anniversary date. All evaluations will be automatically assigned based on the employee's hire date. If an employee has a change to their classification date, the employee's next evaluation will be automatically generated based on the new classification date.

HOW TO LOG ON TO NEOGOV

1. Type the NEOGOV web address into a web browser. NEOGOV Login https://login.neogov.com/signin?siteCode=PE
2. Enter your City email address as the Username.
3. Click **Login**.

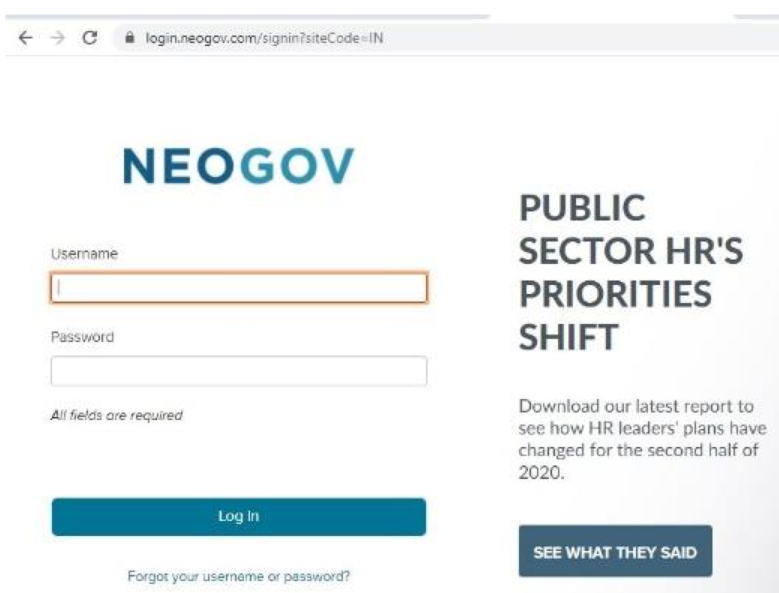

Figure 1: NEOGOV login page

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.

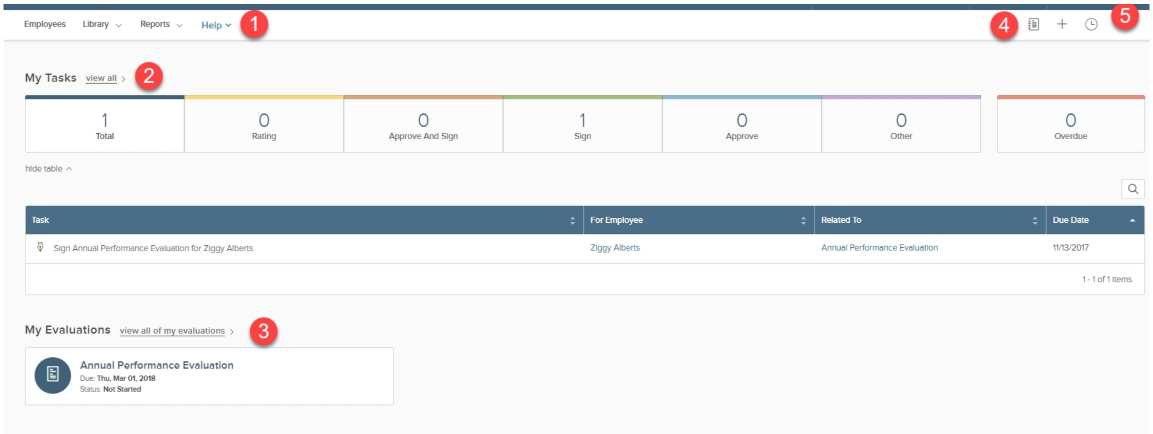

Figure 2: This is an example of the Dashboard in Perform:

1. **Dashboard Menu:** Based on your NEOGOV permissions you may see the following tabs:
    a. The **Employee List** – you will only see this list if you are a supervisor
    b. The **Library** (which houses the Goal and Competency Lists)
    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 Talent profile, update your password, and sign out of Perform

PERFORMANCE REVIEW PROCESS

The employee's annual Performance Evaluation will begin 30 days prior to the employee's anniversary date with a due date 30 days after the anniversary date. This allows for documentation throughout the year. Once the evaluation has been created, employees will see the evaluation listed under **My Evaluations** on their **Dashboard**.

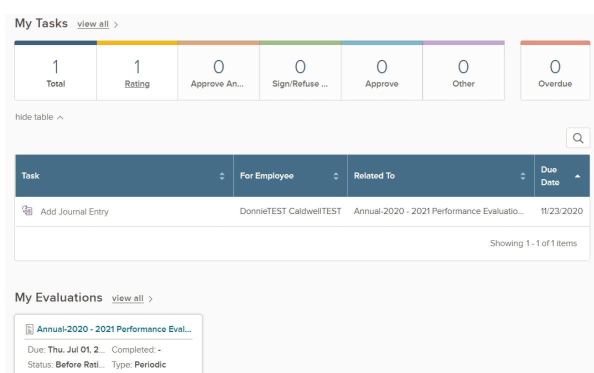

Figure 3: Task to be completed on the Dashboard

PERFORM: NAVIGATION

HELPFUL HINTS

Helpful hints will provide additional guidance on **Perform** features to include helpful descriptions and quick training videos.

To turn on/off *Helpful Hints*:

1. Click the **Help** drop-down.
2. Click the toggle button to turn on or off.
3. Notice when the helpful hint is clicked the description and video appear for that button in **Perform**.

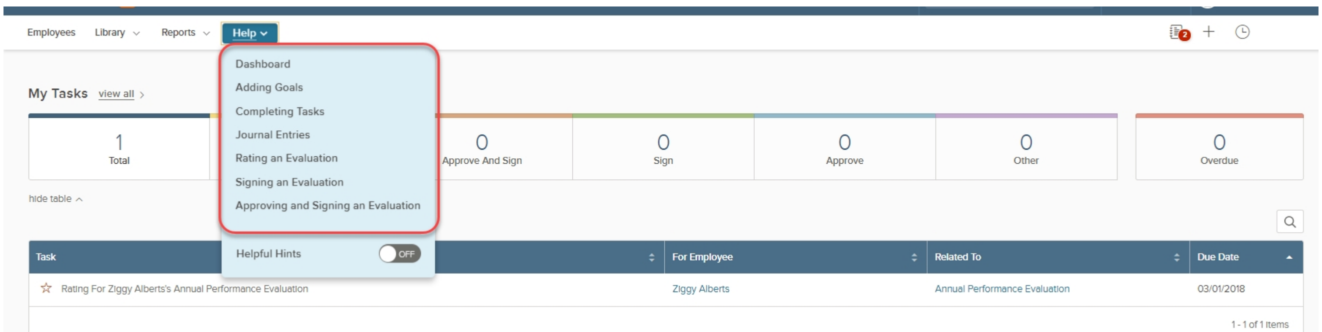

Figure 4: Helpful Hints

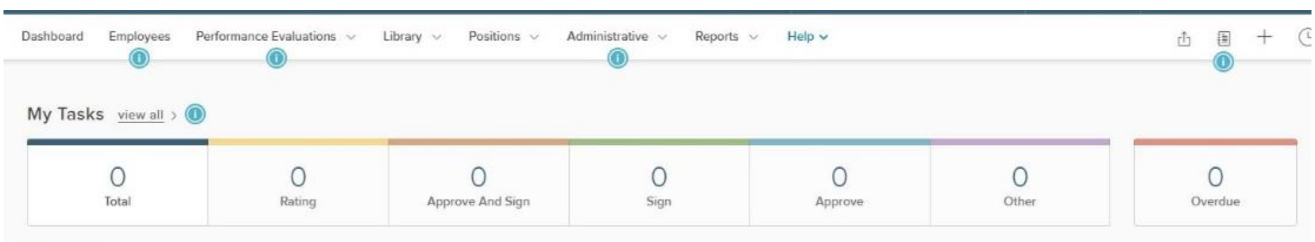

Figure 5: Dashboard with Helpful Hints On

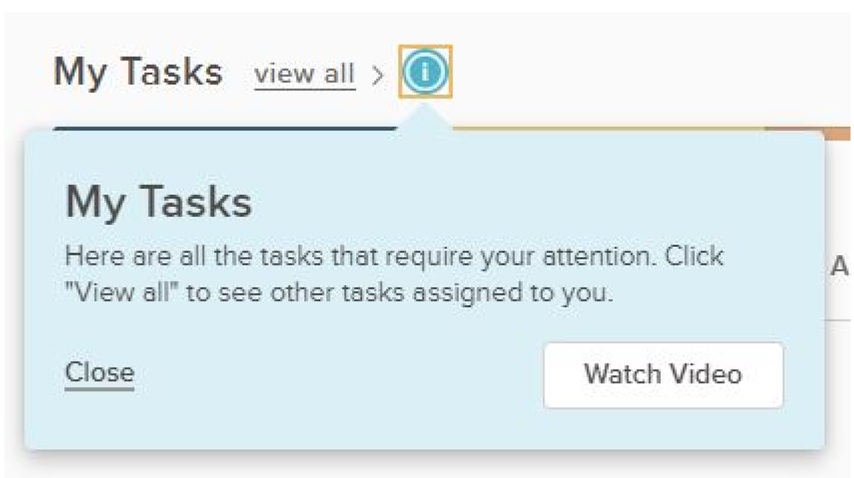

Figure 6: Helpful Hints Information displayed

DASHBOARD

The Dashboard will display tasks and reminders to complete throughout the evaluation period. In the example below, an evaluation is assigned to the employee however, no tasks need to be completed. A task will be generated when it is the employee’s turn to add details in their evaluation. (See Figure 3 above)

MESSAGES

System generated messages/reminders will be held in the **Message List** on the employee’s Dashboard. Messages will include new tasks assigned, reminders on overdue tasks, and when managers/approvers have taken an action on items related to the employee’s tasks. Messages typically include links to the task for ease of navigation. The same messages will also be delivered to the employee’s city email through Outlook.

TASKS

Tasks are reminders to be created by employees or supervisors in Perform. Each month employees will receive a task to add their monthly accomplishments, Journal Entry. Entering completed *“Tasks”* through Journal Entry will promote writing information for evaluations all year instead of all at once. Employees and supervisor can create additional tasks to complete. Once tasks are created, they will display as reminders on the employee’s Dashboard as an *“Other”* task.

To create a new task:

1. Click the **+** (Add New) sign under your name in Perform.
2. Click **Task.**
3. Complete fields:
    - *a. Assignee Type - Employee*
    - *b. Priority – Select None, Low, Medium, or High priority*
    - *c. Employees – Select Myself or assign to desired employee*
    - *d. Status- Current should be selected to start the task*
    - *e. Subject – Add details, i.e. Complete x certification*
    - *f. Due Date – Select Date to complete task by*
    - *g. Associate Task with – Myself will default when assigned to yourself. Select employee when creating for another employee.*
    - *h. Description – Provide task requirements and details.*
    - *i. Reminder Settings – Set reminders and overdue notices to be sent.*
4. *Click **Save**.*
5. *Task will now display on employee’s Dashboard.*

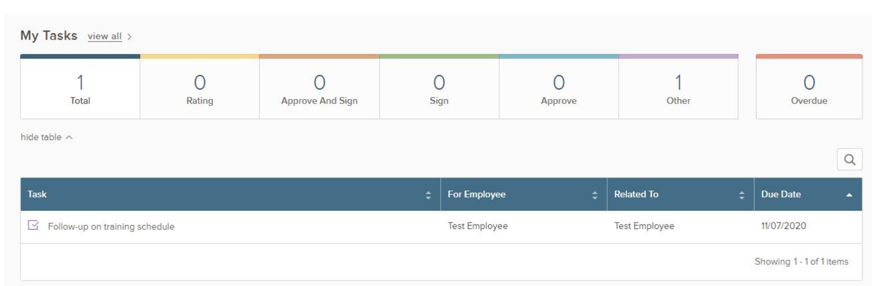

Figure 7: Dashboard with task showing

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.

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

Figure 8: Task Legend

JOURNAL ENTRIES

Journal entries allow users to save notes throughout the year. Employee can document accomplishments as journal entries which can be added to their self-appraisal during the evaluation process. Any employee may create and share a journal entry for another City employee. This allows any employee to share a thank you and/or a shout-out with another employee. It is also recommended to include the competency or competencies in the text of the journal entry. This will allow you to filter the Journal Entrie when you are completing your self-evaluation. By default, the journal entry will be shared with the two manager levels above the employee who receives the journal entry for evaluation purposes. Journal entries may be edited by the original author or HR Admin.

TO SEND A JOURNAL ENTRY FROM EMAIL:

1. Email: journals@neogov.net
    a. ***Subject line***: Type the employee's name as appears in NEOGOV. ***This has to be an exact match.***
    b. Type **"end journal"** when the journal entry should end. If **"end journal"** is not listed all details in the email to include the signature will also be included in the journal entry.
    c. Attachments – Only include one attachment per email.

If any of the details are not in the correct format, the journal entry will stay in a pending status until the errors are corrected.

REPLYING FROM OUTLOOK/TASK

Employees may have a journal entry task to complete throughout the year. An email will be delivered to remind the employee to add a journal entry. Employees have the option to add a journal entry by replying to the journal entry reminder. This will eliminate the step to log on to NEOGOV.

1. From Outlook, click **Reply** to the journal entry task reminder email.
2. Enter journal entry comments such as I have completed my weekly tasks….
3. Type *"end journal"* where the message should end.
4. Click **Send**.

JOURNAL ENTRY FROM AN EMPLOYEE PROFILE

All journal entries will be visible for the employee under their profile which includes the number of entries that have been created. You can only create a **Journal Entry** for yourself here.

1. Navigate to your name in the upper right – click **My Profile**.
2. Click **Journal Entries** – Note the number of entries displays to the right.
3. Complete the entry:
    1. Share with – The person who is tagged will receive an email alert.
    2. Add details
        1. Add monthly accomplishments
        2. Add attachments
        3. Discard Draft- to delete and start over
        4. Keep as Draft – allows you to come back and add more later
        5. Save – Publish Journal Entry.
            *The author of the journal entry can edit their journal entry.
        4. Click **Save**.

JOURNAL ENTRY FROM THE DASHBOARD

From the **Dashboard** employees may add a **Journal Entry** or create a new **Task**.
To create a new Journal Entry:

1. Click the **+** sign in the upper right-hand corner.
2. Click **Journal Entry**.
3. **Share with** – Leave blank - By default the journal entry will be shared with the two manager levels above that employee for review.
4. **Who is this entry about** – search for your name. *For employees, only their name should appear unless they also have direct reports then those employees will also appear.*
5. Enter journal entry details in the text box.
6. Click **Save**.

Tip - There can only be one attachment in the email. The attachment becomes a part of the Journal Entry once it is created in the system. You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

CALENDAR

The employee's calendar will display tasks due on the correlating calendar date. To access the Calendar, click the calendar symbol in the upper right. To view full details, click the blue box in the calendar as this is a hyperlink.

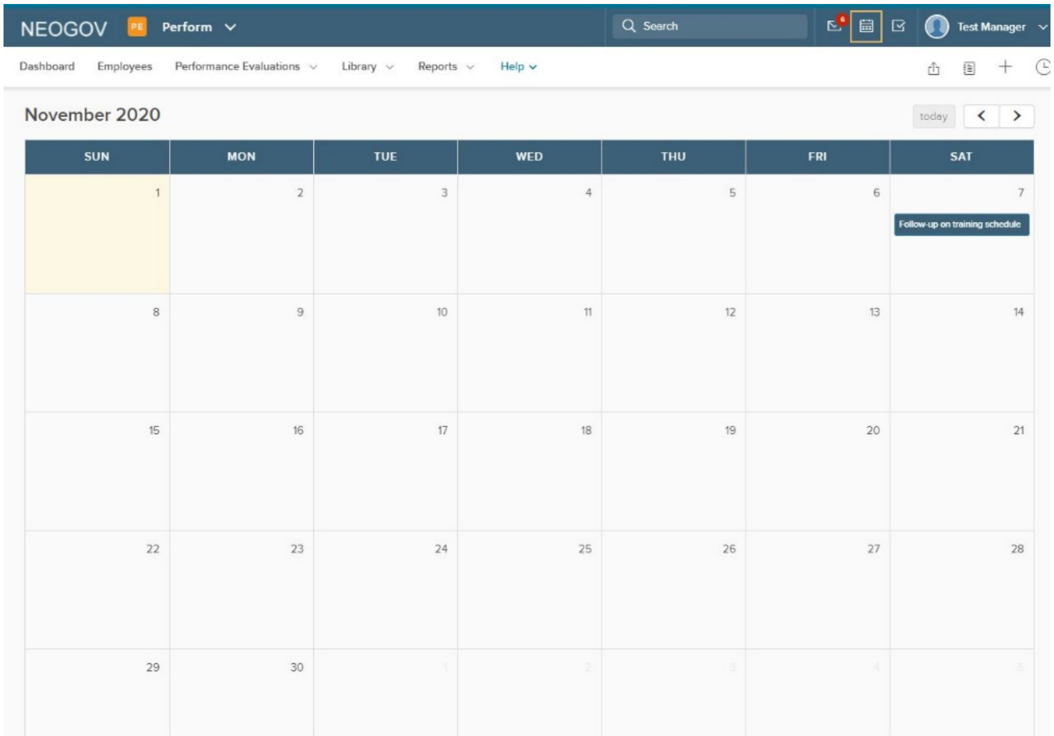

Figure 9: Calendar

COMPLETING SELF-EVALUATION

Employees will need to complete two steps in NEOGOV for their Performance Evaluation. The first step is to complete their self-evaluation. The second step will be to sign their evaluation.

Below are some Do's and Don'ts to assist with content in the self-appraisal appraisal process.

Do's	**Don'ts**
Include work-related examples	Include medical information
Highlight projects completed along with results	Discuss leave taken
Document performance ratings, accomplishments, etc.	Talk about attendance; evaluations are based on performance not absenteeism
Highlight strengths	Document anything personal; stick to job related facts

TO COMPLETE THE SELF-EVALUATION:

1. Click the *Job Description* button to view job summary, essential job functions, and other job details.
2. Journal Entries will be displayed on the right.
    a. Click *Add to Comment Box*, to add journal entry to any of the self-appraisal questions. *(Journal entries will only be visible when a journal entry has been created by the employee or when receiving a journal entry from another employee.)*
3. Reviewer Entries will be visible if a prior evaluation has been completed in NEOGOV.
    a. These previous comments can be added to your evaluation, click add comment.
4. Click **Next** to complete the remaining self-appraisal questions.
5. Click **To Overall** once all competencies have been completed to add final comments.
6. Click **Done** to save comments and return to summary screen.
7. Once all required areas have been completed, the green action button will appear.
    a. **Click Submit Evaluation** in the upper right once all questions have been answered.
    b. Submitted responses will now be visible to the employee's direct manager.
8. A pop-up box displays
    a. Click **Continue** to sign & submit responses to supervisor.
    No changes can be made once the employee submits their self-appraisal to their manager.
9. A Success! Message will display confirming the submission saved properly.
10. Click **close**.

The employee's manager will now complete the employee's rating. Once the manager has completed their rating, the manager should schedule a 1:1 to review the evaluation and establish the next year's goals. Employees will see their score and comments when they are tasked with signing their evaluation.

ATTACHING DOCUMENTS TO YOUR PERFORMANCE EVALUATION

Employees can add attachments to their evaluations such as recognition letters, internal resumes, supporting documents and/or prior year's goals/evaluation.
To attach a document to the current evaluation:

1. From the Dashboard, scroll down to **My Evaluations**. Click on the title of the evaluation that the attached document should be assigned to.
2. Click **Content**.
3. Scroll down to the bottom of the page, **Notes & Attachments.**
4. Click **+ Add Notes & Attachments**.
5. Click **+Attachment**.
6. Select file, click **Open**. The file will now appear under the A*ttachment* section.
7. Click **Save**. The file now appears under the *Notes & Attachments* content box.

⚠	= Required section, action required
👁	= Read only
✓	= Section completed

Figure 10: Evaluation Legend

SIGNING THE PERFORMANCE EVALUATION

Once the manager has completed the employee's rating, the evaluation will be reviewed and approved by all management levels above them to include the manager's manager, department head and Human Resources before being released to the employee. The employee will now see their rating and goals and need to sign their evaluation. The Performance Evaluation will be complete once the employee completes the signature step.

To sign the evaluation:

1. Navigate to **NEOGOV** → **Perform** → **Dashboard**→ **My Tasks**.
2. Click the task, *Sign Annual-All Employees…*
3. A summary of the employees Performance Evaluation details displays.
4. Click **View Other Approvers**. This will display comments made by any of the approvers, i.e. your direct supervisor, manager's manager, department head, and/or the Assistant County Administrator.
5. Click **Close** once all comments have been reviewed.
6. Review evaluation details before signing.
    a. Employee self-rating displays as a 0 (as expected) in the total score. This means there is no impact to the overall rating because the Weight is set to 0%.
    b. The manager rating displays in the score, 4 and beside the manager's name with a weight of 100%.
7. Click **Sign**.
8. If desired, add final **Comments**.
9. Click S**ubmit**.

Note: The employee's **Total Score** will now display. This is the employee's rating for their evaluation.

SAVING AND PRINTING EVALUATION

1. Navigate to **NEOGOV** → **Perform** → **Dashboard**→ **My Evaluations**
2. Click on completed evaluation.
3. Click **Print Preview**.
4. Review and Update Settings as desired. *Please note the Process step displays comments made by any of the approvers.*
5. Click **Print**. *Be sure to allow pop-up blockers from your internet settings. If you do not the print functionality will not work.*
6. Click the download arrow to save the PDF. *This is the preferred method of printing your evaluation. You can email the evaluation to yourself for your personal records.*
7. Click the printer icon to print the evaluation.
8. Set printer options, click **Print.**