City of Flagstaff
NEOGOV – PERFORM
Supervisor’s User Guide
November 2020

TABLE OF CONTENTS

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 supervisors will complete evaluations electronically in **Perform**. Any newly hired non-exempt (hourly) employee should receive their first performance evaluation no later than their six-month anniversary date. Additionally, all employees will complete an annual review with a due date of 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**.

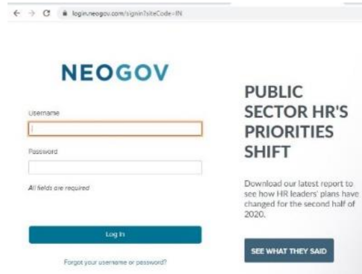

Figure 1: NEOGOV login page

Upon logging into Perform, you arrive at your Dashboard**.** The Dashboard is the central landing page of Perform. This is where all system tasks and records can be accessed.

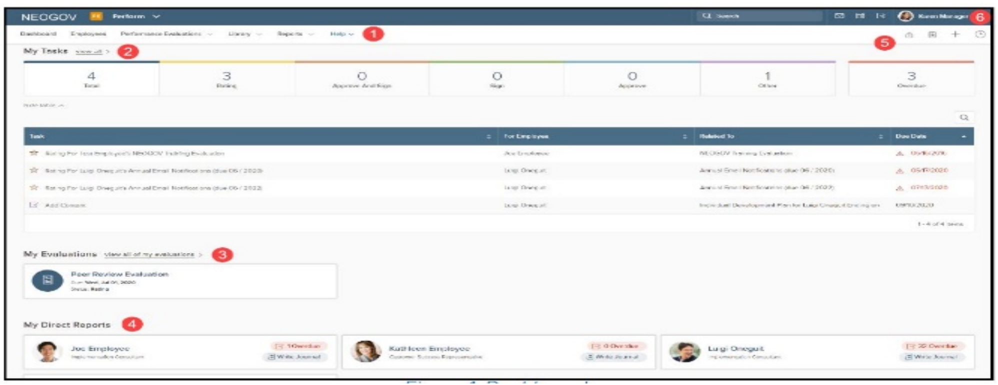

Figure 2: This is an example of the Dashboard in Perform:

DASHBOARD MENU

1. **Dashboard:** Brings you to the Dashboard at any time
    a. The Employees List
    b. The Performance Evaluations List
    c. The Library houses the Goal and Competency Lists (based off security permissions)
    d. Reports
    e. Help
2. **My Tasks:** Contains all tasks currently requiring your action
    a. Color-coded boxes located within this section can be used to filter the various task types
3. **My Direct Reports**:
    a. Shows you all of your direct reports
4. **Quick Navigate Menu** (the four icons in the upper right corner):
    a. *Upload Icon:* Upload a document to your Talent Profile (security permissions apply)
    b. *Journal Hub:* Contains all Journal Entries that you have created or that have been shared with you, as well as any pending entries and Drafts
    c. *Quick Add:* Actions vary depending on security permissions
    d. *Recent:* Quick links to recently viewed areas

5. **Active Evaluations and Overdue Tasks:**
    a. Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and you.

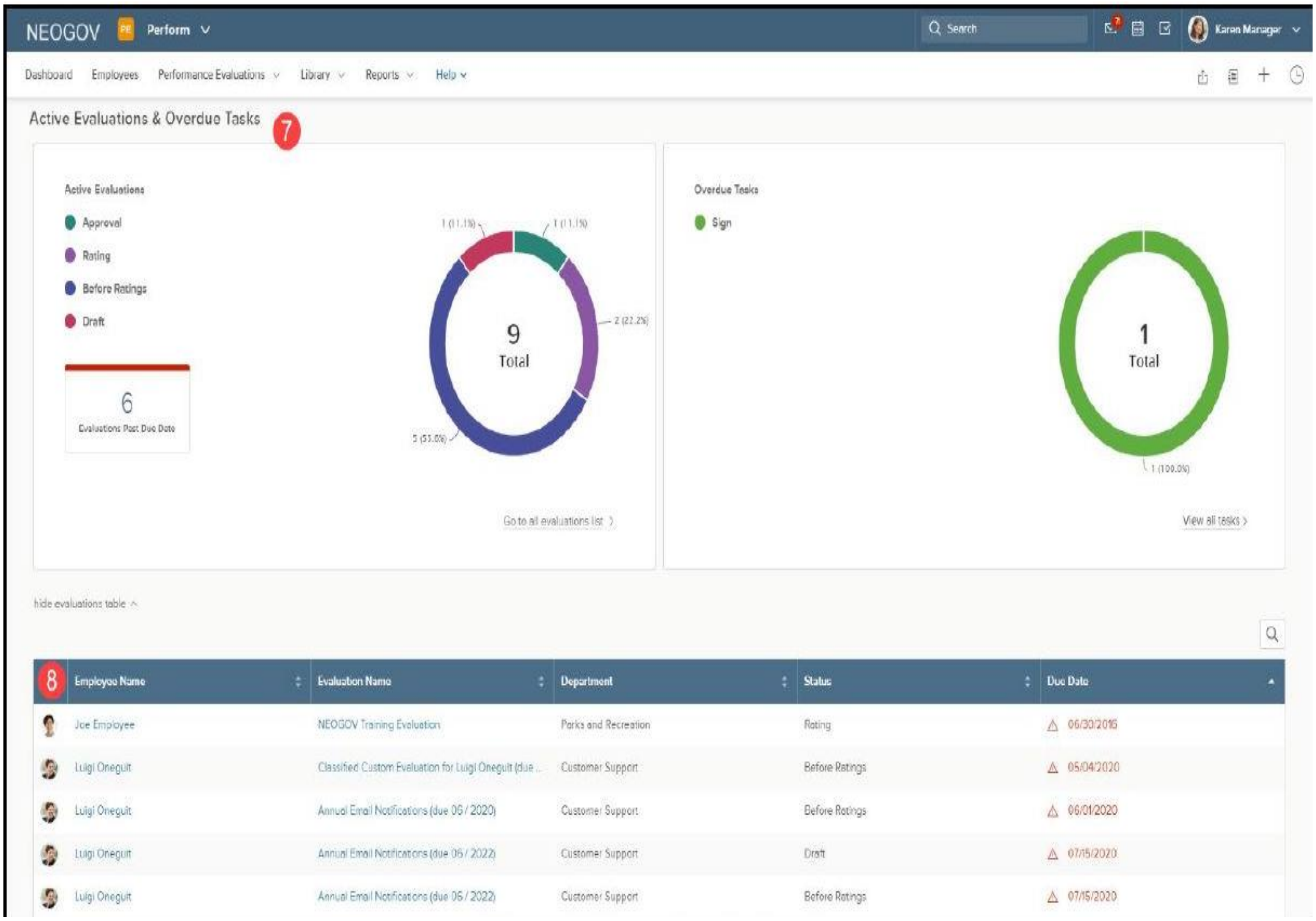

Figure 3: Active Evaluations & Overdue Tasks

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

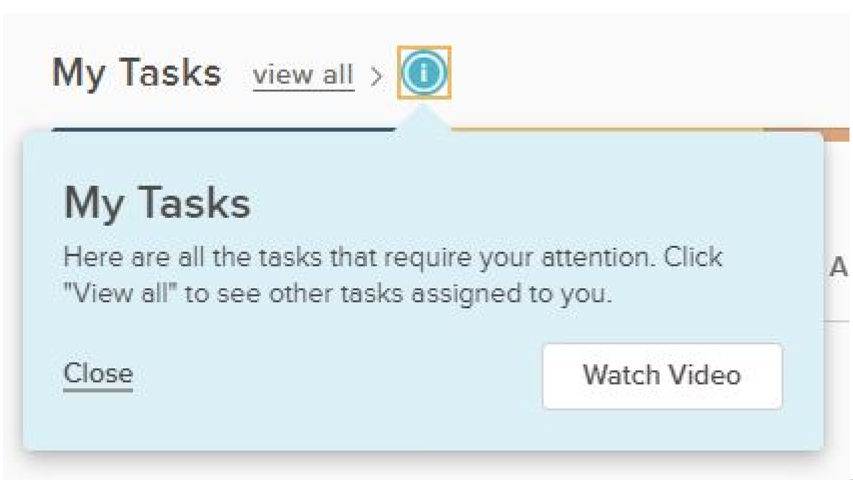

Figure 6: Helpful Hints Information displayed

DASHBOARD

The Dashboard will display tasks and reminders to complete throughout the evaluation period. A task will be generated when it is the employee's turn to add details in their evaluation.

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.

MY TASKS

Any current tasks that require your action appear in **My Tasks**. Select *View All* to view tasks that are Current, completed, Canceled, Pending and Skipped.

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.

You can also create a task for any of your direct reports. 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.*

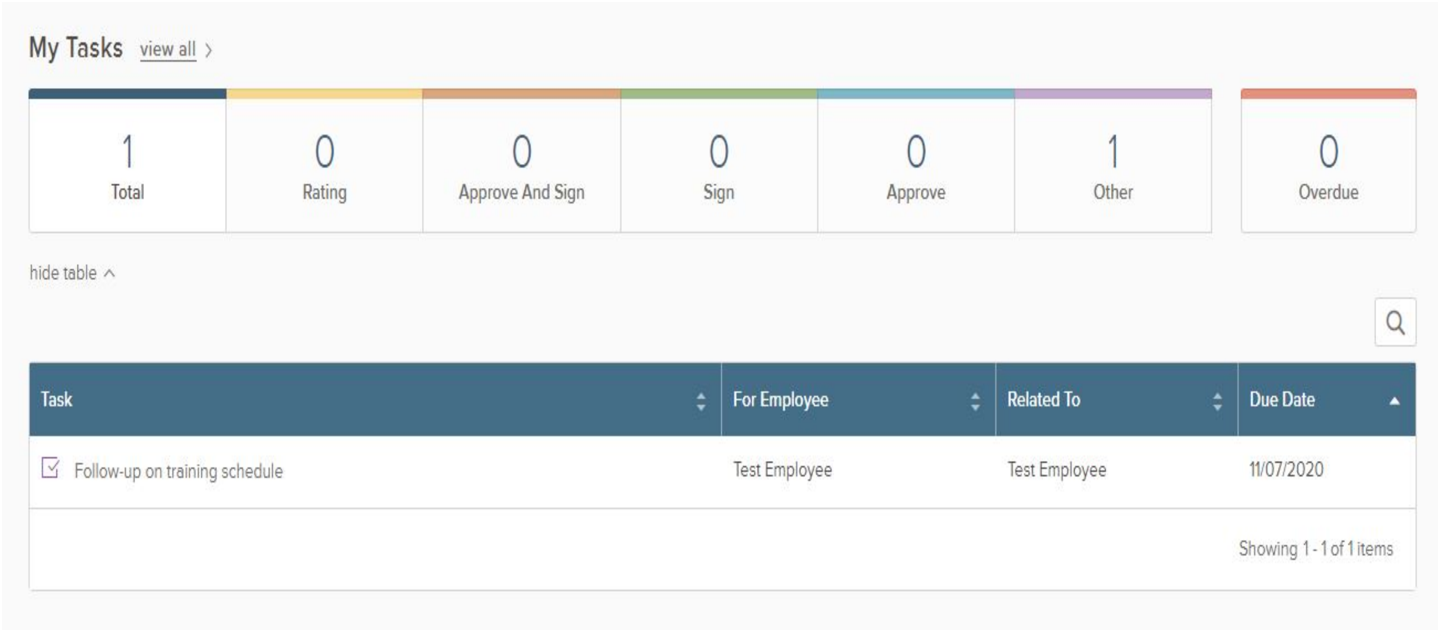

Figure 7: Dashboard with task showing

	= 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 are an easy and effective way to take notes of accomplishments throughout the year for yourself and your direct reports. There are several ways to log Journal Entries in Perform. They can be created from the **Journal Hub,** from the **Dashboard**, and from the **Talent Profile.** They can even be **emailed** directly to Perform.

ADDING JOURNAL ENTRIES VIA THE JO URNAL HUB

All managers 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).

The Journal Hub icon is always accessible to the user, no matter what page they are viewing in Perform.

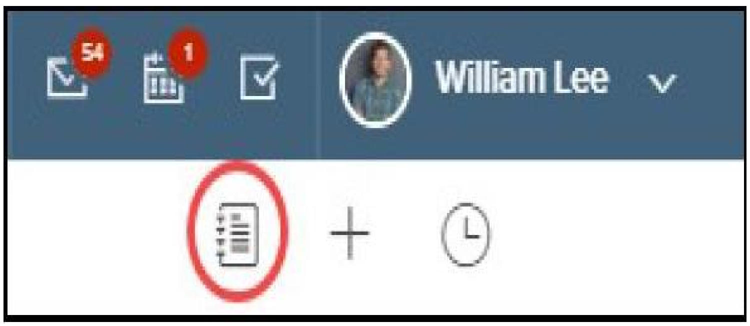

Figure 9: Journal Hub Icon

Select the Journal Hub icon and a flyout displays the **Journal Entries Hub.**

Figure 10: Journal Entries Hub Flyout

1. **Current:** Any Journal Entries successfully posted can be found in the Current tab
2. **Pending:** Any emailed Journal Entries that have not been successfully posted can be found and corrected in the Pending tab
    a. Once corrected, the Journal Entry is posted to the Current tab
3. **All Drafts:** Any Journal Entries kept as drafts or not successfully posted can be found and finalized in the All Drafts tab
4. **Who is this entry about?** Search for any employees you would like to create a Journal

Entry for, including yourself or any direct reports

a. Once one or more employees are selected, any posted Journal Entries you have access to display at the bottom of the hub

5. **Share with…:** Select any combination of options to quickly share the entry upon saving with the:

a. Target Employee

b. Manager(s) – NOTE: if there are any Additional Managers assigned to the Employee, the journal will be shared with them as well

c. Direct Manager's Manager

6. **Body of Journal Entry:** Enter the text of your Journal Entry here

a. The rich text editor can be used for additional formatting and one (1) attachment can be included (5MB)

7. **Save:** Select Save to post the Journal Entry

8. **Close:** Select Close at any time to close the flyout and return to the previous page

a. Any unsaved Journal Entries are lost

TO SEND A JOURNAL ENTRY FROM EMAIL:

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

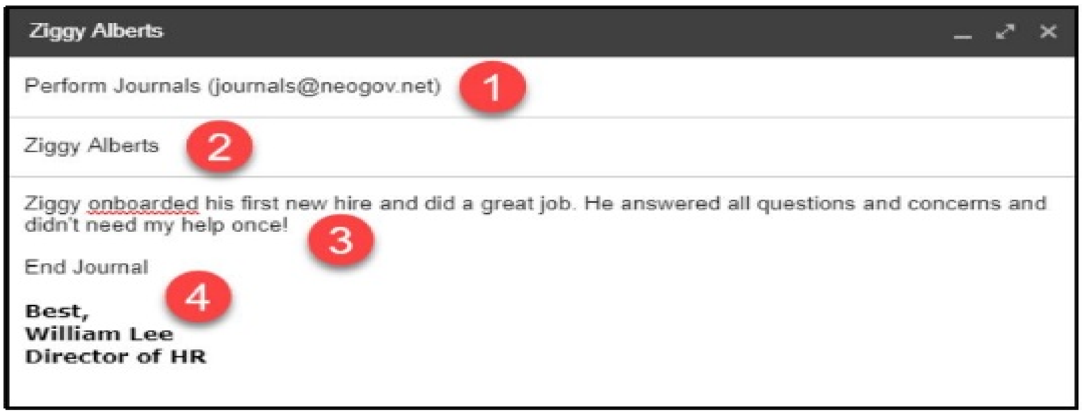

Figure 12: Emailing Journal Entry

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.

Tip – There can only be one (1) attachment in the email, which becomes a part of the Journal Entry once created in the system

NOTE: You cannot enter multiple employee names in the subject/title of the email. Only one employee name can be added per email.

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

There are six different types of errors. Each error generates a bounce back email (with the exception of one), which lets the employee know what the error is 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 6 types of errors are:

1. **User Not Found** - when the name of the employee in the subject/title does not match an employee's name in Perform
2. **Unsupported Attachment Format** - when Perform does not support the format of the attachment submitted with the email
3. **More Than One Attachment** - when multiple attachments are sent with the email, since only one attachment per Journal Entry is allowed
4. **More Than One Employee Having the Same Name** - when there are multiple employees in Perform with the same name as the employee in the email's subject/title
5. **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
6. **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

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

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.

PERFORMANCE REVIEW PROCESS

The Annual Performance Evaluation process will be automatically started when the employee's evaluation is created through PERFORM. The employee's evaluation will be due 30 days after their annual anniversary date. This allows for documentation throughout the year. Once the evaluation has been created, Supervisors will see the evaluation listed under **My Tasks - Rating** on their Dashboard.

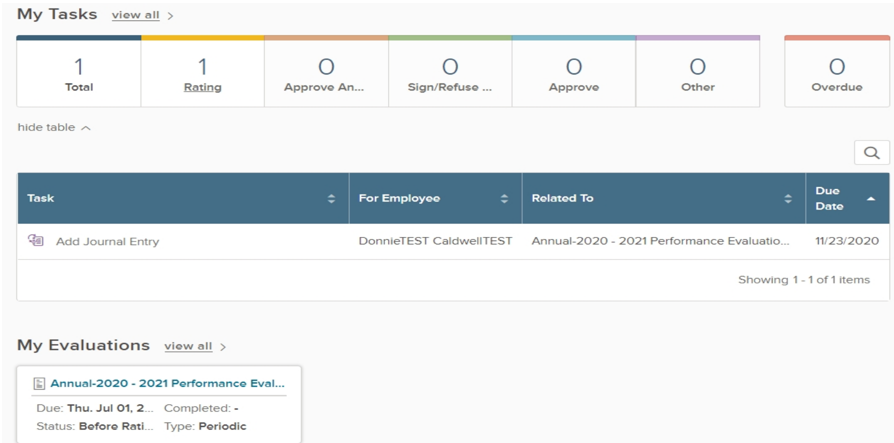

Figure 13: Task to be completed on the Dashboard

EVALUATION PROGRAM SECTIONS

There are seven sections to the evaluation program for each employee with four of the sections being weighted scoring and three sections not being scored. The sections with their percentage of the overall scoring are:

1. **Organizational Competencies – 25% of overall score**
   a. There are five different competencies in this section. They are the organizational values. Each competency has two definitions: one is for non-supervising employees and the other is for supervising employees.
      i. **Accountability**
         1. **Non-Supervising definition**: The employee has demonstrated knowledge, skills, abilities, and expertise for their position. Employee is resourceful, actively practices on-the-job safety, meets reasonable deadlines, and always takes ownership for his or her actions and willingly remedies issues. Willingly makes and fulfills commitments. Punctual, well prepared and ready to contribute. Demonstrates consistent support of and adherence to City policies, goals and objectives.
         2. **Supervising definition:** Demonstrates an appropriate level of knowledge, skills and abilities, and expertise. Takes responsibility for his or her actions and proactively remedies issues. Demonstrates excellence in the pursuit of expertise in their field. Ensures that employees are provided clear direction regarding their level of responsibility, safety practices, expectations of their positions, and the City's mission, vision, values, goals and objectives. Assists and supports direct reports while holding them consistently accountable, exhibiting administrative courage. Exercises effective delegation. Is resourceful and takes responsibility for productivity and results for the team. Proactively addresses performance issues, effectively manages crucial conversations. Implements policies and practices that foster a safe work environment for the team's physical and mental health.

ii. **Communication Skills**

1. **Non-Supervising definition:** All verbal and written communication reflects professional judgment as to what to communicate, to whom, and when, to lead to successful results. Conveys an impression which reflects favorably on the public relations of the City. Communicates in a clear and concise manner, selecting the appropriate tone for the situation and audience. Actively listens to others and seeks to learn; considers their opinion before reaching conclusions. Employee is open and inclusive in their communication.
2. **Supervising definition:** All verbal and written communication reflects professional judgment as to what to communicate, to whom, and when, to lead to successful results. Conveys an impression which reflects favorably on the public relations of the City. Communicates in a clear and concise manner, selecting the appropriate tone for the situation and audience. Actively listens to others and seeks to learn; considers their opinion before reaching conclusions. Fosters a work environment that encourages others to communicate in an open and inclusive manner. Engages in one-one conversations throughout the year. Able to listen respectfully and consider alternate positions while being receptive to feedback. Effectively manages constructive conflict.

iii. **Leadership**

1. **Non-Supervising definition:** Employee exhibits self-confidence, facing circumstances with confidence and assurance, appropriately takes charge of situations yet takes direction when provided. Employee exhibits an excellent work ethic taking the initiative to contribute ideas and solutions, actively contributing to section, division and organizational goals. Encourages and influences others to strive for excellence. Earns the respect of their colleagues through loyalty, dedication and collaboration.
2. **Supervising definition:** Communicates a vision that inspires others to follow. Models behaviors expected of others and inspires and empowers others to undertake challenging tasks and projects. Values employees and their contributions to the team, tasks, and projects. Effectively develops, coaches and leads employees to be successful. Encourages employees to take initiative, problem solve, and build collaborative relationships. Fosters a culture that supports a positive team focus. Demonstrates tenacity in the pursuit of organizational and team objectives. Consistently assesses and recommends creative solutions for improvement. Takes ownership to ensure team achievement of organizational goals.

iv. **Quality**

1. **Non-Supervising definition:** The employee has established a record of producing work that is timely (meets deadlines), thorough, competent and highly accurate. Demonstrates attention to detail and their quality of work displays pride in representing the City's mission and values. Demonstrates personal commitment to the City's high level of excellence and professionalism; and encourages others to have similar standards. Demonstrates a high level of responsiveness to customer needs and expectations.
2. **Supervising definition:** Creates a work environment that fosters creativity and accuracy. Demonstrates a personal commitment to the City's high level of

excellence and professionalism; inspires team members to take pride in their work and exhibit similar standards. Conveys that customers (internal and external) are the highest priority and the importance of understanding their expectations. Publicly recognizes those who provide a high level of quality and deliver excellent customer service. Demonstrates attention to detail and their quality of work displays pride in representing the City's mission and values.

v. **Teamwork**

1. **Non-Supervising definition**: The employee is an effective team player adding complimentary skills and contributing valuable ideas to the team. Employee demonstrates integrity by providing honest information, opinions and feedback. Employee appropriately shares information and can be counted upon to fulfill commitments made to others on the team. Demonstrates awareness of other team members' needs. Is supportive of other team members, gets and gives help when needed to meet the goals of the entire team.
2. **Supervising definition:** Appropriately shares information; contributes valuable ideas and demonstrates integrity by providing honest opinions, and feedback. Fulfills commitments to the team, the organization and the community. Establishes and encourages a team environment. Contributes to project successes which leads to overall City excellence. Provides clear expectations, articulates common goals, communicates how individual roles contribute to team success, provides both clear direction and sufficient resources while removing or reducing obstacles to team success. Seeks input from the team before making larger decisions. Listens to team members' ideas for improvement and helps to implement.

2. **Core Behavioral Competencies** – 25 % of overall score
   a. There are eight Core Behavioral Competencies. These definitions are the same for all employees
      i. **Adaptability** – Adapts to handle unexpected challenges. Responds positively to changes in direction, priorities, responsibilities or assignments
      ii. **Conflict Resolution** – Embraces conflict positively and treats others with respect and dignity. Proactively seeks creative and constructive solutions to conflict
      iii. **Creative Effort** – Approaches problem-solving with rigor, discipline and analytical thinking. Generates suggestions for improving work, offering innovative approaches to ideas. Thinks outside the box as needed.
      iv. **Customer Focus** – Demonstrates ability and concern for delivering exceptional service to internal and external customers. Establishes and maintains effective relationships.
      v. **Integrity and Trust** – Complies with rules, regulations and policies. Treats others with respect, maintains confidentiality and inspires the trust of others.
      vi. **Planning and Time Management** – Accurately scopes out length and difficulty of assignments. Utilizes time effectively and efficiently; prioritizes work effectively
      vii. **Professionalism** – Conducts oneself in a business-like manner and performs responsibilities to the highest standards. Displays proper attitude, work attire and interaction with others.
3. **Job Specific Competencies** – 45% of overall score
   a. There should be no more than 8 – 10 different job specific competencies in this section of the evaluation.
4. **Previous Goals** – 5% of overall score

5. **New Goals** – not scored
6. **Job Description Acknowledgement** – not scored
7. **Overall Comments** – not scored

COMPLETING A DIRECT REPORTS EVALUATION

1. To complete a **Rating,** click the rating task name on the dashboard
2. To view and rate the various sections, click on each section
    a. If Notes & Attachments are provided, select print to download the notes
    b. To download the attachment, select the attachment name
3. To rate an item, click an item name, e.g. Accountability, within the Organization Competencies section, and a flyout of the Rating Card appears. This is a 5-point rating scale.
    a. 5 = Consistently Exceeds Expectations – for this competency the employee is viewed as a role model and informal leader throughout all levels of interactions
    b. 4 = Occasionally Exceeds Expectations – for this competency the employee is considered a valued and trusted team member by colleagues
    c. 3 = Meets Expectations – For this competency the employee is a solid team player, consistent in exhibiting this behavior
    d. 2 = Needs Improvement – for this competency the employee demonstrates occasional lapses in demonstrating the desired behavior
    e. 1 = Consistently Below Expectations – for this competency the employee repeatedly demonstrates lapses in demonstrating expected behavior
4. To leave the rating card and return to the evaluation detail page, select back to evaluation detail page
5. Use the Evaluation Symbols legend to identify the different symbols in the evaluation section

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

Figure 14: Evaluation Legend

RATING CARD/SCALE

1. You will see a Rating Scale. To view a description of each rating scale value, select the Show descriptions button and a flyout appears with detailed information
2. Type any text into the Comments box, as needed. Edit text using the rich text editor provided
    a. If a comment is required the box is highlighted in red
    b. While rating, the system auto saves all progress made
    c. If needed, you may exit out of the rating card and resume rating at a later time
3. The Feedback Entries appear on the right side of the rating card. If available, you see Journal Entries, Check-In Entries, Reviewer Entries, and Writing Assistant. You can copy the feedback entries directly into the comment box by selecting Add to Comment Box. To filter for any specific key words, use the Search Feedback Entries bar
    a. Any Journal Entries created by you or shared by another employee appear here
    b. If Writing Assistants have been provided by HR, the writing assistant section also appears
    c. If any previous reviews have been made, they appear in the Reviewer Entries section
    d. If Check-Ins are a part of your process, then the check-in comments appear
5. Click Next to move to the next step – continue this process until all sections have been completed

Tip – The Overall Rating defaults automatically without any ability to change. At other times there are no Overall Rating scale and only comments can be entered.

Once all required ratings and/or comments are complete, select the **Submit Evaluation** button in the top right corner. A pop-up box will appear (see below), click **Continue** to submit rating to your manager.

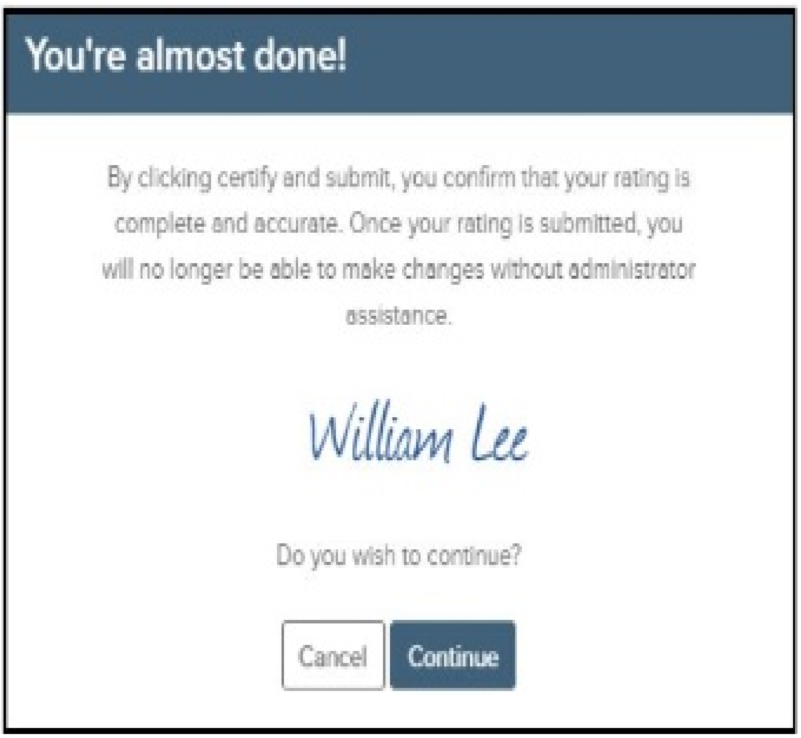

Figure 15: Evaluation Submitted Message

A success message appears confirming the evaluation has been completed. Click **Close.**

Figure 15: Evaluation rating is complete

The completion of this step releases the evaluation to the next level manager for review. It also notifies Human Resources and the Division Director if the evaluation needs to be reviewed by them. A score of 1 or 5 requires HR's and the Division Director's review.

TIP -To complete a self-evaluation rating, follow the steps in the same manner outlined above

COMPLETING THE EMPLOYEE EVALUATION (MANAGER SIGNATURE AND RELEASE TO EMPLOYEE)

Once all required parties have approved the evaluation, the manager will be tasked to sign the employee's evaluation. This evaluation will not be released to the employee until the manager has signed off. We recommend having the employee meeting at this step to review rating, feedback and to discuss established goals.

1. The Approve and Sign task will display on your Dashboard. Click on the task to complete.

Figure 16: Approve and Sign Task

2. Click **View Other Approvers** to view overall comments made by all approvers. All approvers in the process have the ability to document notes for the supervisor to review before signing the evaluation.

Figure 17: View Other Approvers

3. A red Icon alert by each competency will appear if a note was made. Click **view note** to read the details.
4. Read notes under the *Review Notes* section on the right side of the screen.
    a. Add your response in the Add a note here box and/or update comments/rating for the employee

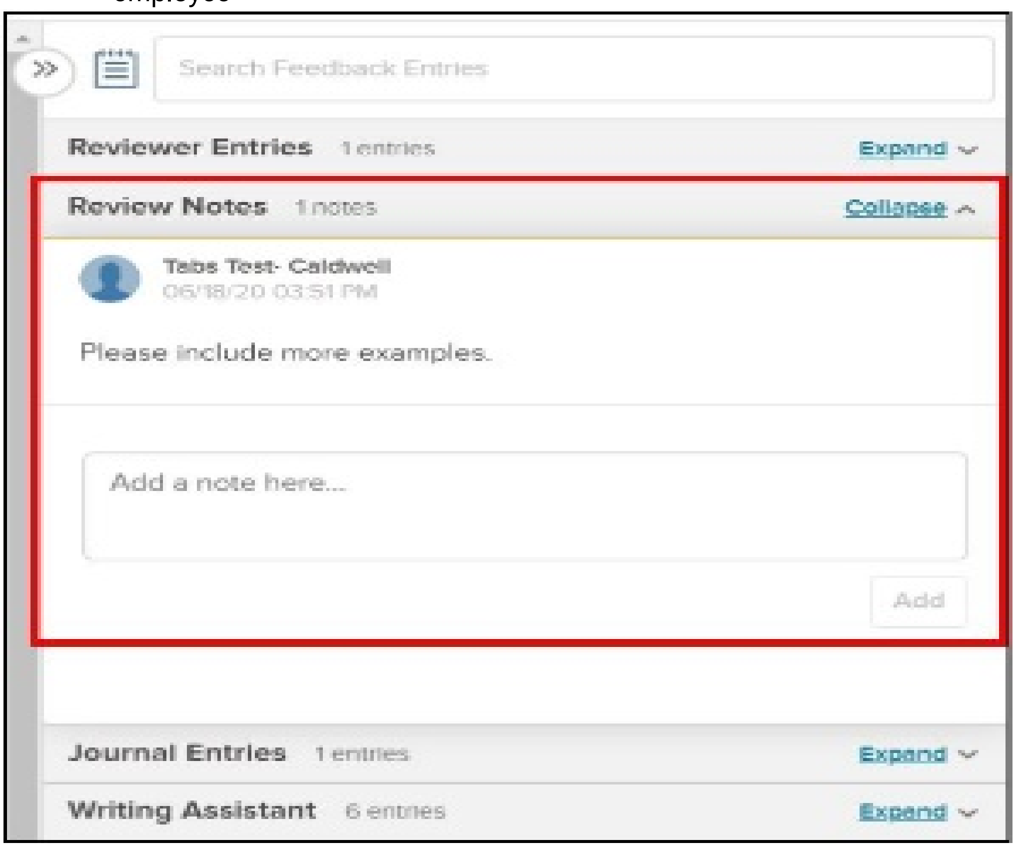

Figure 18: Additional Notes

5. Determine if evaluation is ready to be released to the employee or further edits are needed based on the reviewer notes:
    a. Click **Deny** – to make edits to the employee's competency section.
        i. The rating supervisor will receive a new task to complete the employee rating step again. This will allow the supervisor to make updates to the competency details.

b. Click **Approve & Sign** to send evaluation to the employee. No further edits can be made after approving.

6. Once this step has been completed, the employee will be able to view their evaluation and complete the signature task.

Tip – To make changes to the evaluation you've submitted for your direct report, deny the evaluation to re-open the rating task. Once the evaluation is re-submitted, all approvals and signatures are required again.

ATTACHING DOCUMENTS TO THE 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.
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 the evaluation. You can email the evaluation to the employee and also place it in your electronic supervisor file.
7. Click the printer icon to print the evaluation.
8. Set printer options, click **Print.**

SMART Goals

- Statements of the important results you are working to accomplish
- Designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful professional development

SMART Criteria

S Specific What will be accomplished? What actions will you take?

M Measurable What data will measure the goal? (How much? How well?)

A Achievable Is the goal doable? Do you have the necessary skills and resources?

R Relevant How does the goal align with broader goals? Why is the result important?

T Time-Bound What is the time frame for accomplishing the goal?

SMART goals are meant to address all your major job responsibilities. Remember, goals are intended to focus attention and resources on what is most important so that you can be successful in achieving your priorities. SMART Goals are goals for your day-to-day job.

Common types of SMART goals are to:

O Increase something

O Make something

O Improve something

O Reduce something

O Save something

O Develop someone(yourself!)

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

Do's	**Don'ts**
Judge an employee's performance against the defined competencies and expectations	Document anything personal such as how you feel. Provide facts and examples
When improvement is needed, explain how failure to improve impacts the work unit and overall goals	Provide few comments and lack detail. Evaluations should show you are invested in the employee's success within the organization.
Document performance ratings, accomplishments, etc.	Talk about attendance, leave taken, or medical information; evaluations are based on performance not absenteeism
Highlight strengths and provide how the employee is contributing their strengths to the overall team	Dwell on the employee's personality and perceptions about how outside factors might be influencing the employee's performance
Provide a fair, accurate and calibrated rating to all employees	Give the employee a high rating as motivation to improve performance and/or all employees the same rating
Document performance throughout the year	Save up issues for the final annual evaluation rather than confronting them when they occur. There should be no surprises at evaluation time.