

Employee Perform User Guide

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Overview

This guide details how to navigate the system as an employee, covering how to rate evaluations and complete various tasks, as well as some tips and tricks of the system. Also, learn how to receive assistance directly within Perform.

Before You Use This Guide

Your HR Admin must send you an activation link to activate your account. 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 HR Administrator should you have any additional questions.

Navigating the Dashboard

Who Should Use This Section

Employees should use this section to improve familiarity 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.

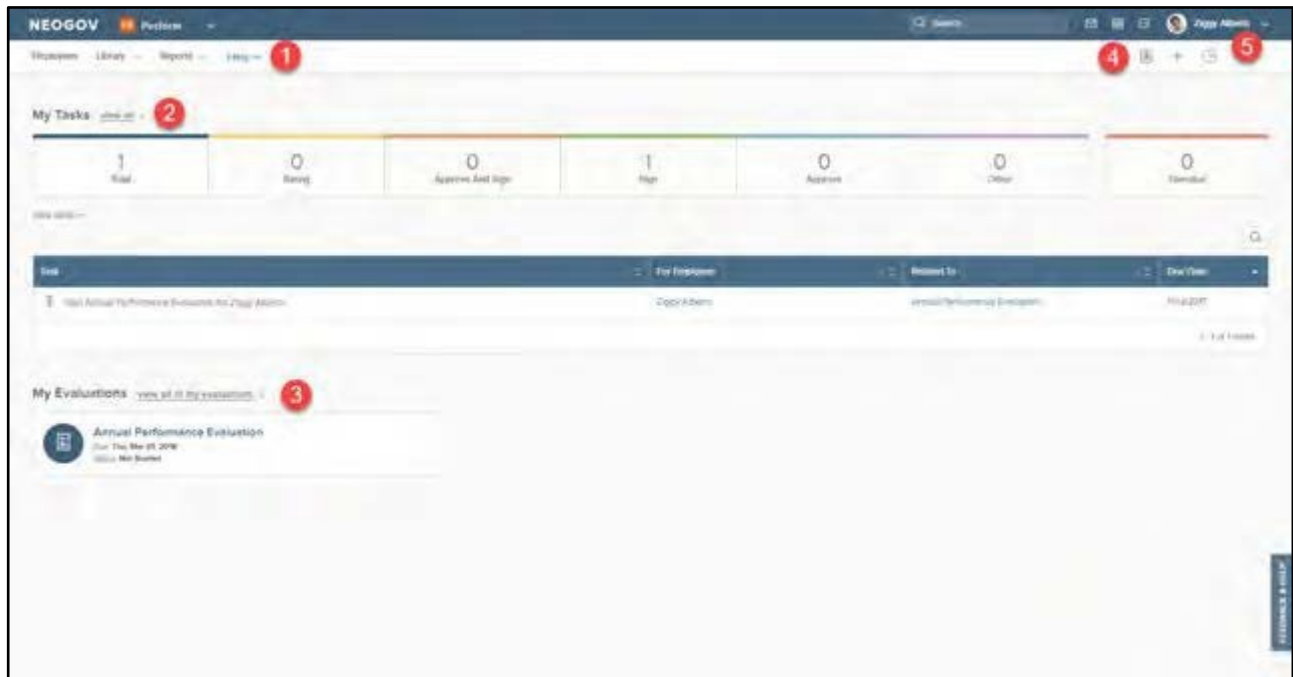


Figure 1: Dashboard

1. **Dashboard Menu:** Based on HR Configuration you may see the following tabs:
 - a. The **Employee List**
 - 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

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

NOTE: The list of common actions depends on the user's security role. For example, HR Admins see a different set of common actions than Employees.

Users can click on an action, and the system guides them on the relevant steps to complete that action, as well as provides a helpful description for each step. When a corresponding tutorial exists, that displays as an option to view also. 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**.

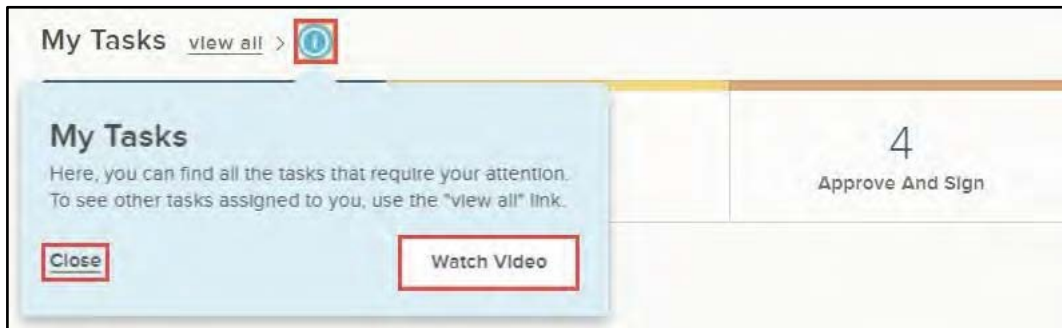


Figure 7: Helpful Hint Details

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 filters appropriately.



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've 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 an HR Admin
2. To **complete a task**, select the name to be re-directed to the task
 - a. For more information, please refer to page 10

The task types are designated as follows:

- a. **Total:** All tasks currently requiring your action
- b. **Rating:** Any rating required on a self-evaluation or a peer rating task
- c. **Approve and Sign:** Task to approve and sign the evaluation after it's been rated
- d. **Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated
- e. **Approve:** Task to approve the evaluation after it's been rated
- f. **Other:** Any manual or recurring tasks such as Journal Entries or Check-Ins
- g. **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 can be 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. Here 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.

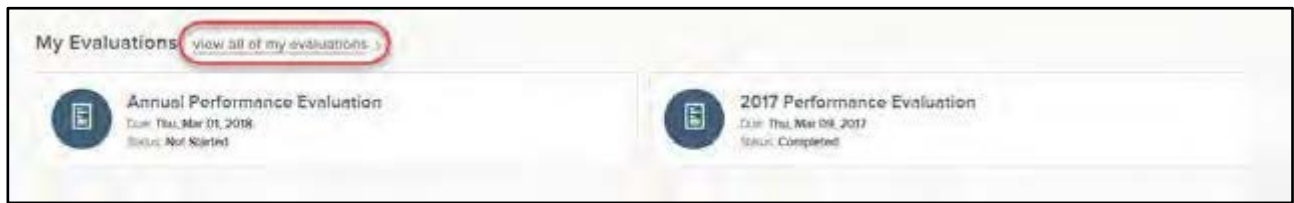


Figure 10: My Evaluations

To view all historical evaluation, 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).

For more information on how to navigate the Journal Hub, please refer to page 11.

My Profile (Talent Profile)

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

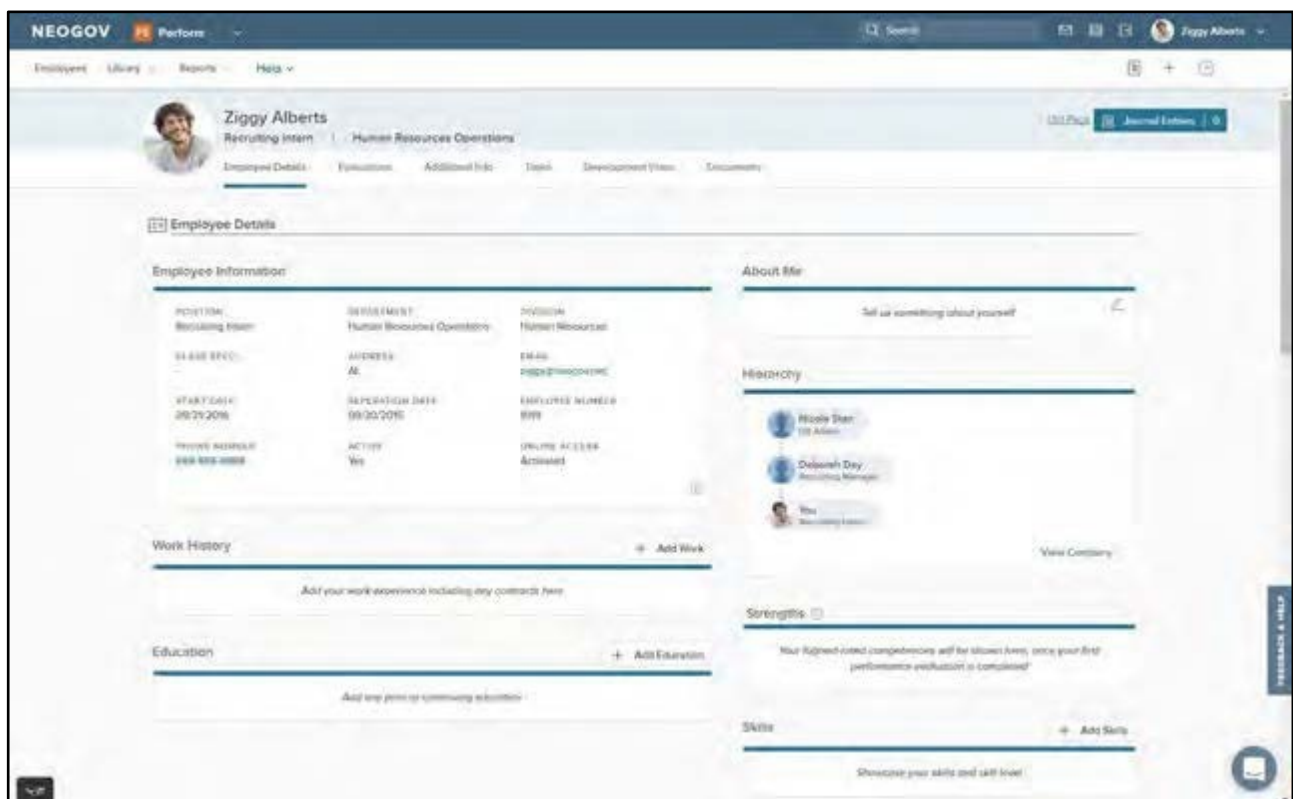


Figure 11: Talent Profile

Here you can see **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 Journal Entries, refer to page 16.



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

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



Figure 12: Talent Profile – Sections

Based on HR configuration, you can add information to different widgets under the Employee Details section. For example, to add information to the Work History widget, select **+ Add Work**.

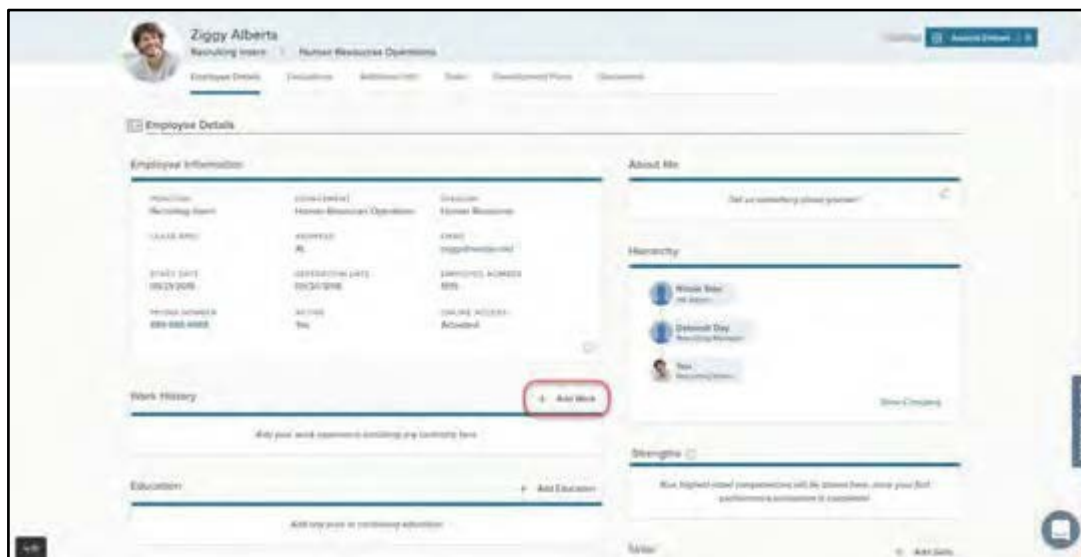


Figure 13: Talent Profile – Add Work

A fly-out appears. Any field highlighted in red is required; you must fill out those fields to save. Enter in all information, and save.

Figure 14: Add Work History

Once saved, the new information populates your employee details section. Continue to add information in the same fashion to any widget as desired.

POSITION	OFFICE (FACILITY)	COMPANY
Recruiting Officer	Human Resources (Baltimore)	Managers Resources

CLASS SPEC	ADDRESS	EMAIL
	31	ziggy@neo.gov

START DATE	TERMINATION DATE	EMPLOYEE STATUS
09/21/2018	09/09/2019	1001

PHONE (WORK)	ACTIVE	WORKER CLASS
410-582-2888	Yes	Active

Work History	+	Add Work
<p>Customer Support Associate 4/2019 - 1/2019 (R H)</p> <p>NEOGOVT-SEPACOR</p> <p>Customer Support Associate that provides client support, assist with and coordinate with...</p> <p>Completed documentation for re-employment.</p> <p>View more details Read More</p>		

Figure 15: Work History

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 and potentially other employees (depending on HR configuration).

Navigating to Journal Entries

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 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).

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

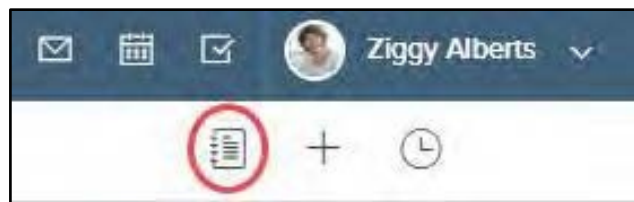


Figure 16: Journal Hub

Select the Journal Hub icon and a flyout 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?:** Search for any employee to create a Journal Entry for, including yourself

or any direct reports. Once someone is selected, any posted Journal Entries that you have access to displays at the bottom of the hub

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)
5. **Save:** Select Save to post the Journal Entry
6. **Close:** Select Close at any time to close the flyout and return to the previous page. Any unsaved Journal Entries are lost

Let's review what it looks like to log a Journal Entry from the Journal Hub.

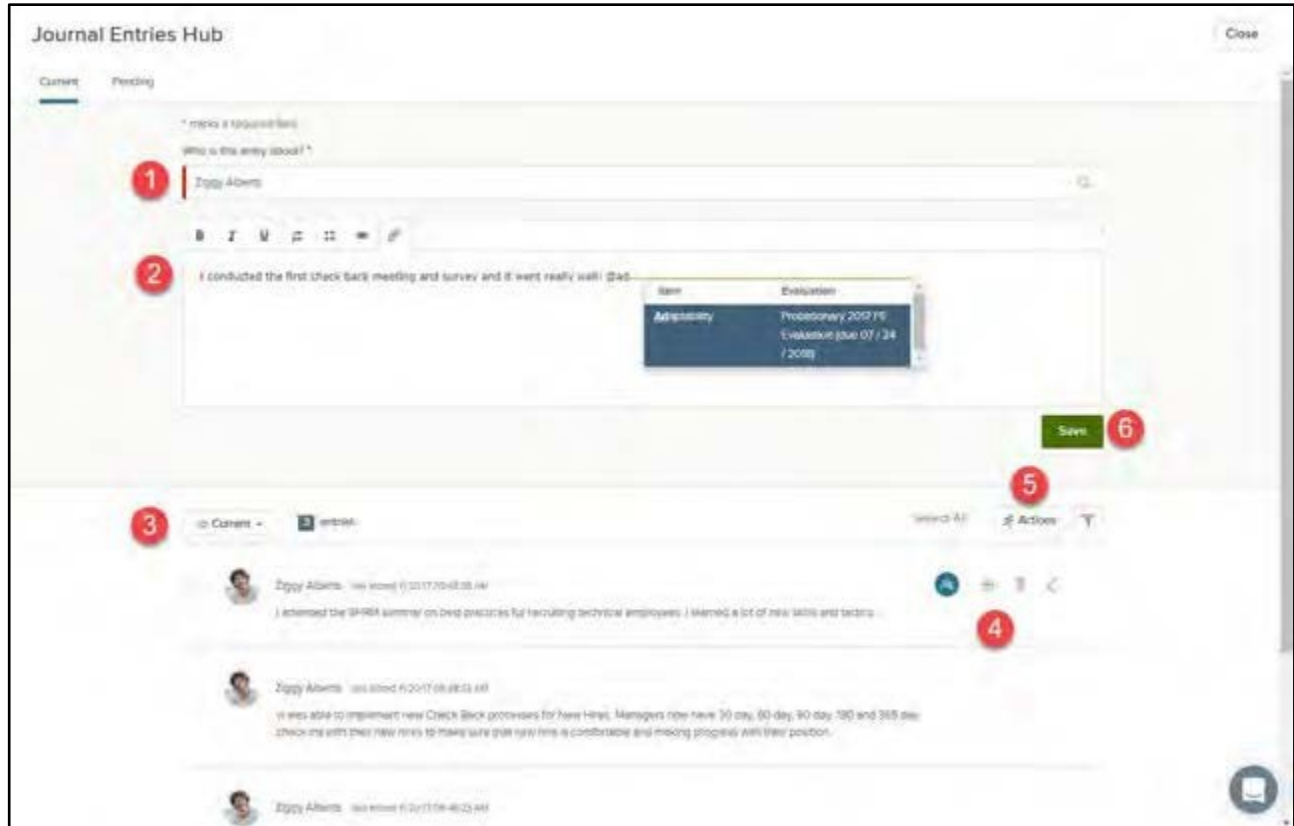







Figure 18: Creating a Journal Entry

1. Enter your **name**, or the name of the individual for whom to create a Journal Entry
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
 - b. To tag a **Competency, Goal, or Narrative**, enter '@' and type the desired competency, goal or narrative. A list of matching items appears. Select the correct item. 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 
 - i. You can share Journal Entries created for yourself with your Manager and your Manager's Manager
 - ii. The default setting allows sharing up to two levels in the organizational hierarchy. If HR has configured to allow Journal Entries to be shared with others, you may see

further sharing options available.

- b. **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. The archived entry no longer appears for selection in the rating form
 - ii. To unarchive, select the unarchive icon 
 - c. To **delete** any entries you created, select the trash icon 
 - d. To **edit** your entry, select the pencil icon 
5. Use the **Bulk 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 as a Journal Entry within Perform.

This is very useful for employees who work in the field and cannot log into Perform regularly, as they can easily create Journal Entries by sending emails from their smartphones.

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

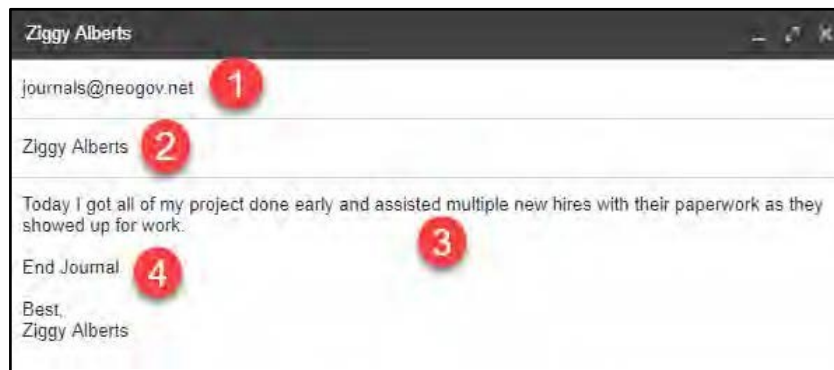


Figure 19: Emailing Journal Entry

1. The email must be sent to **journals@neogov.net**
2. The email's subject/title should only include your name. The spelling of your name must match 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



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

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

Currently, the tagging and sharing features are not supported while sending the email. However, once the Journal Entry is created, the tagging and sharing actions can be taken 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 when emailed automatically post and are available in the **Current** tab.



Figure 20: Current Tab – Journal Hub

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.

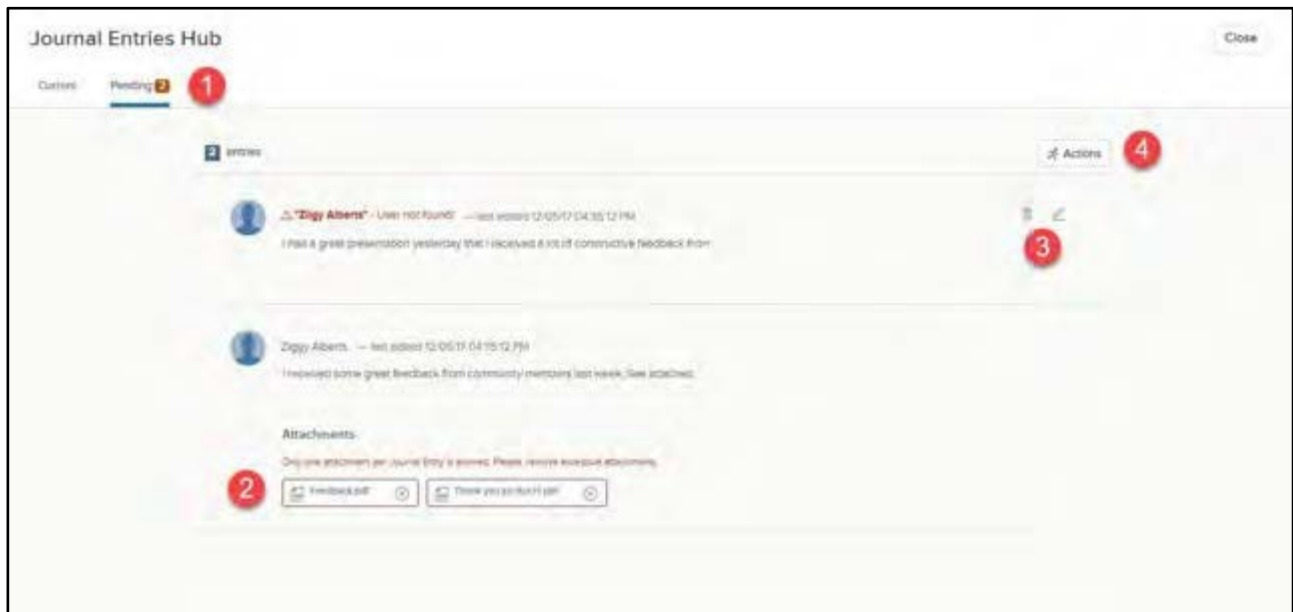


Figure 21: Pending Tab – Journal Hub

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 below
3. Select the pencil icon to edit or **correct** a pending Journal Entry. Select the trash can icon to delete a pending Journal Entry
4. Pending Journal Entries can be **deleted** in bulk using the Actions tab and checkboxes per entry

There are 6 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:

- *User not found* - when the name of the employee in the subject/title does not 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, since only one attachment per Journal Entry is allowed
- *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
- *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

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

Adding Journal Entries via the Talent Profile

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

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

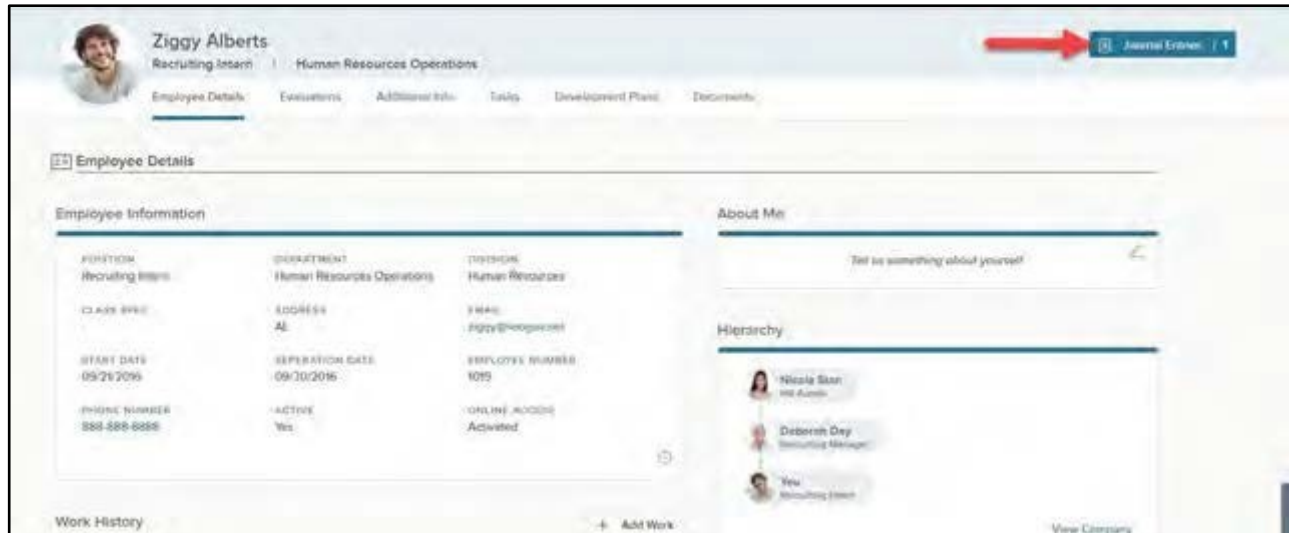


Figure 22: Talent Profile – Journal Entries

A fly-out appears with all Journal Entries you created previously. To create a Journal Entry, please refer back to page 15.

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, select **NEOGOV** in the top left corner. Here, you see 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: Acknowledgment tasks re-trigger any time there are changes made to the evaluation.

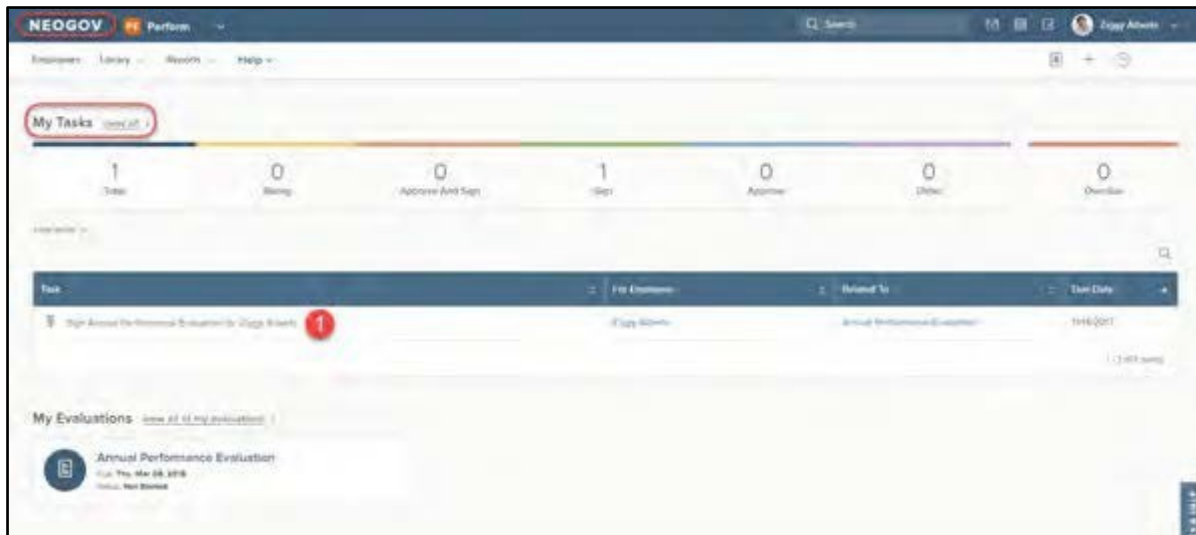


Figure 23: My Tasks – Completing a Task

1. Click the corresponding **Task Name** from the list. One type of task you see, is a **Signature** task
 - a. In this example, Employee Ziggy Alberts must acknowledge their Evaluation by **Signing** the evaluation before it gets rated

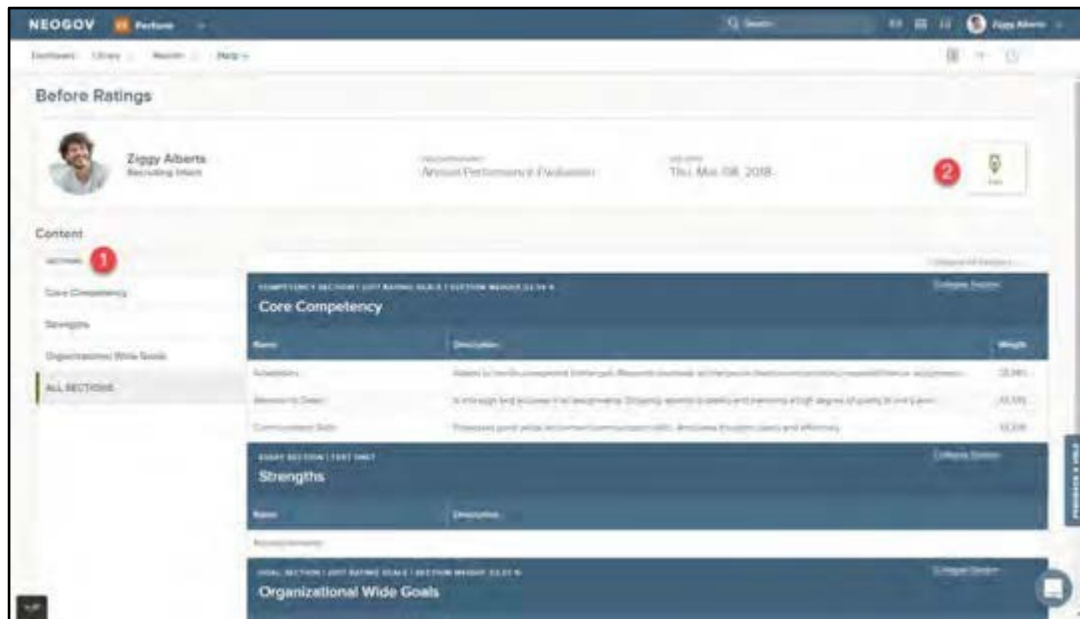


Figure 24: Completing a Task – Signing an Evaluation

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**. 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, **NEOGOV** in the upper left-hand corner.

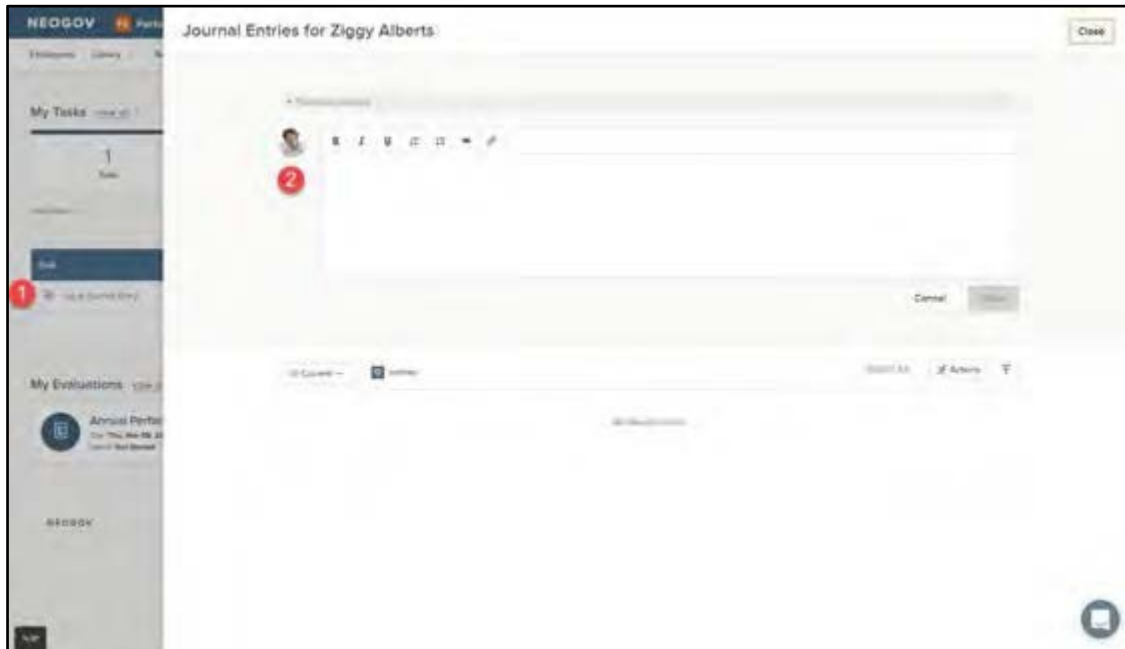


Figure 27: Recurring Journal Entry Task

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 this is a recurring task it stays on your 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.

Adding Goals (Optional)

Who Should Use This Section

Some agencies may use a Goal setting process before rating can begin. For those agencies, employees may need to add their own goals to their evaluations. This section covers how to add goals.

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 **NEGOV** in the top left corner. Here, you see the task to **Add Goals**.

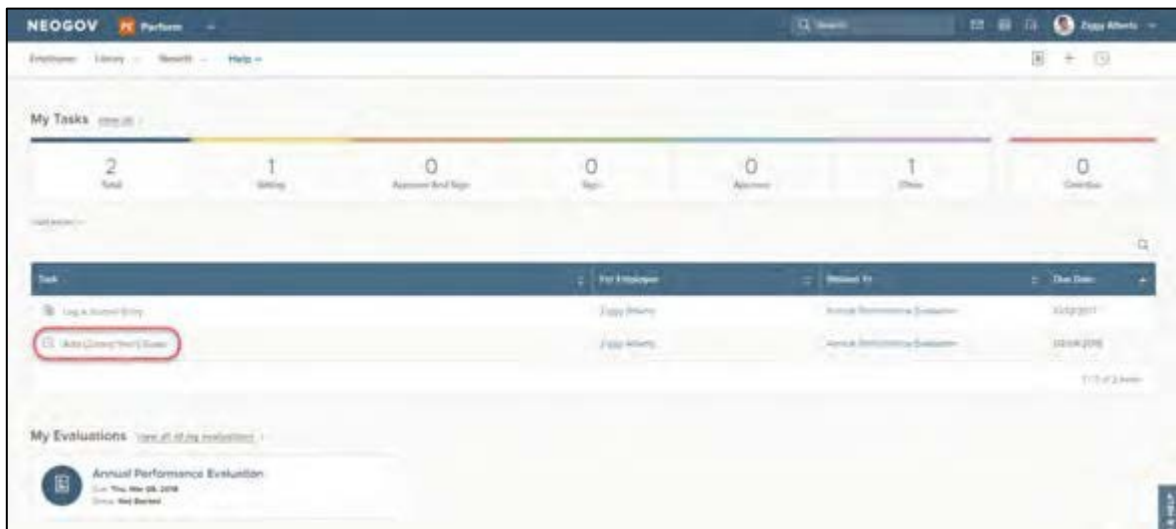


Figure 28: My Tasks – Goals

Select the Task's name, and you are re-directed to the Goals Section of the rating form.

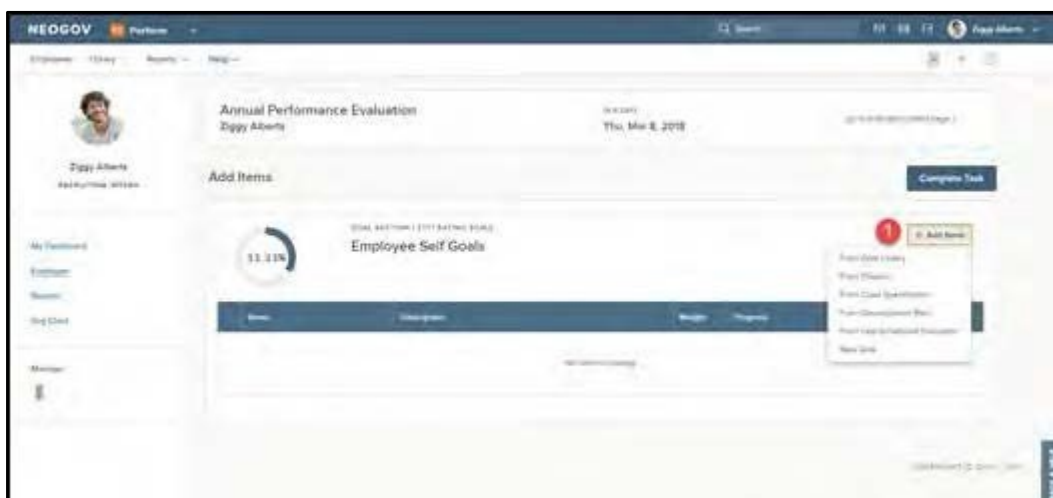


Figure 29: Adding Goals

1. Select **+ Add Items** to add goals to your evaluation. Depending on HR configuration, select:
 - a. **From Goal Library**: Select an existing goal from the Goal List (if applicable)

- b. **From Position:** Auto-populate goals from Positions (if configured by HR)
- c. **From Class Specification:** Auto-populate from Class Specs (if configured by HR)
- d. **From Development Plan:** Auto-populate from an existing, current Development Plan (if applicable)
- e. **From Last Scheduled Evaluation:** Auto-populate goals that were entered in a Future Goals section on the last scheduled evaluation completed (if applicable)
- f. **New Goal:** Create a brand-new goal

If you choose to add a **New Goal**, a fly-out appears to enter the Goal Details:

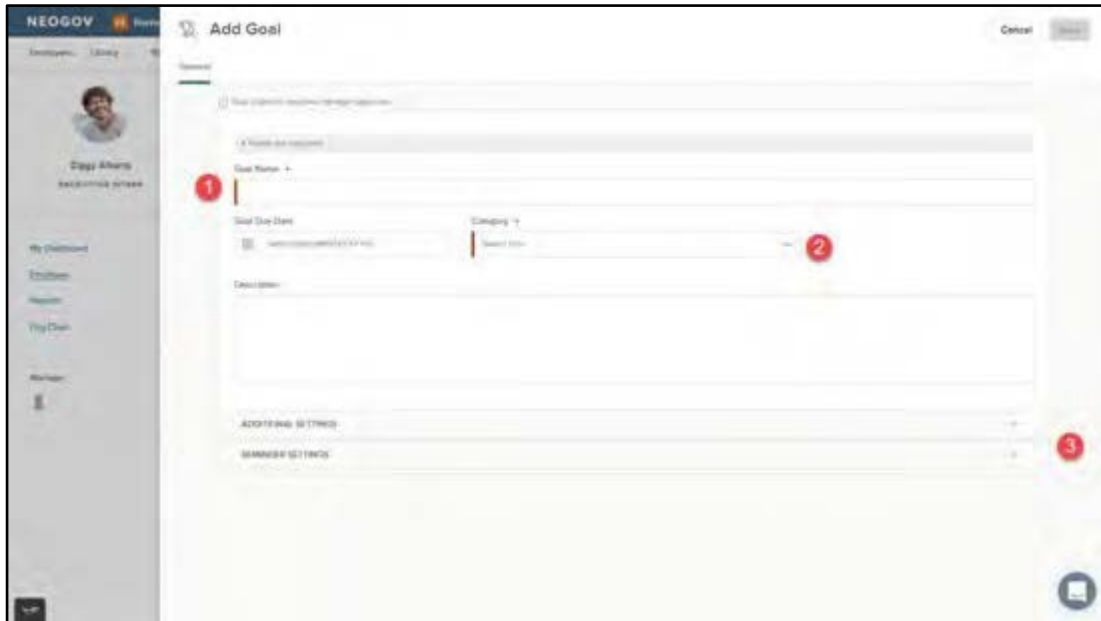


Figure 30: Adding a New Goal

1. Enter in the **Goal Name**
2. Select a due date (optional) and a **Category** the goal falls under
3. You can enable **Additional Settings** such as priority, as well as configure **Reminder Settings**

Once you have entered all the information, select **Save**. Once saved, the Goal(s) are immediately added to the evaluation.

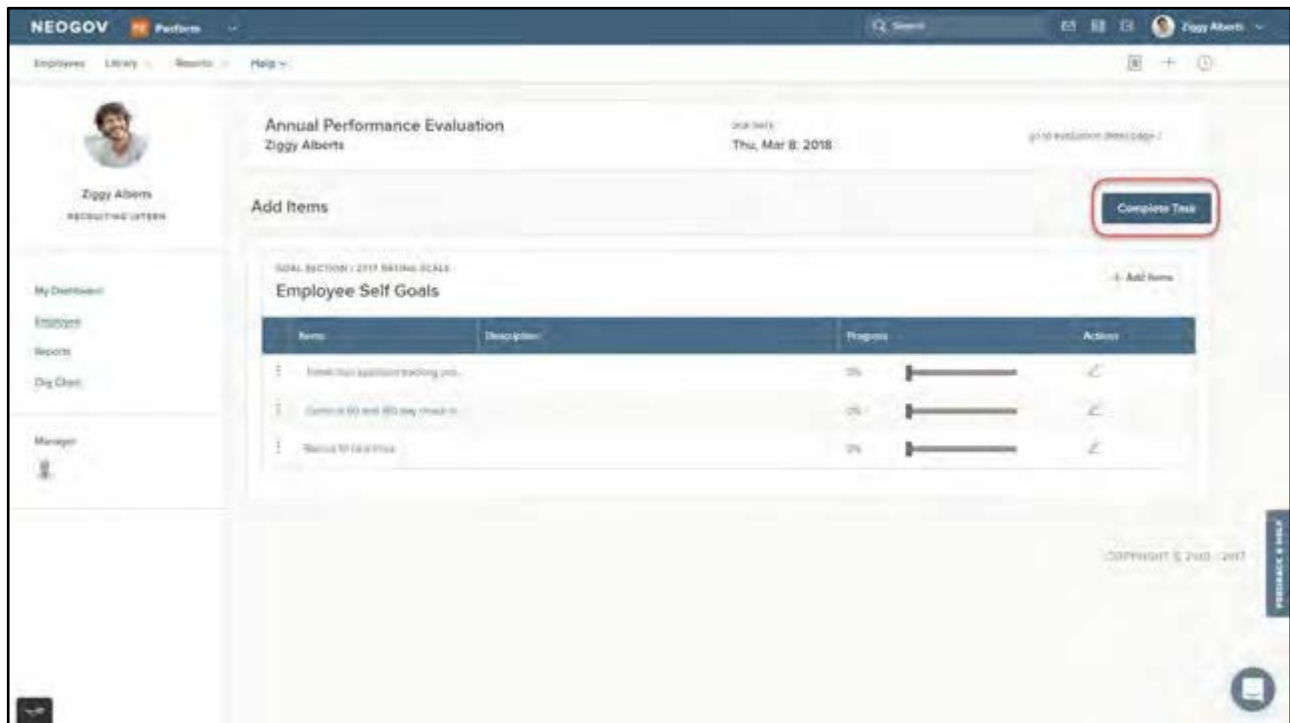


Figure 31: Completing Adding Goals

Once all goals are added, click on the **Complete Task** button. A fly-out appears of the Task Details. Add any comments, then select **Save**. Once saved, a green success banner appears at the top of the screen.

Employees can still add goals directly to an evaluation when in Draft status, even **TIP!** for the Add/Edit goals task is completed

Rating a Self-Evaluation (Optional)

Who Should Use This Section

As an employee you may be required, or have the option, to complete a self-evaluation. This section covers how to rate an evaluation and what tools you can use.

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 **NEOGOV** in the top left corner. Here, you see the task to complete your **Self-Rating**.

To complete a **Self-Rating**, click into the rating task name on the dashboard.

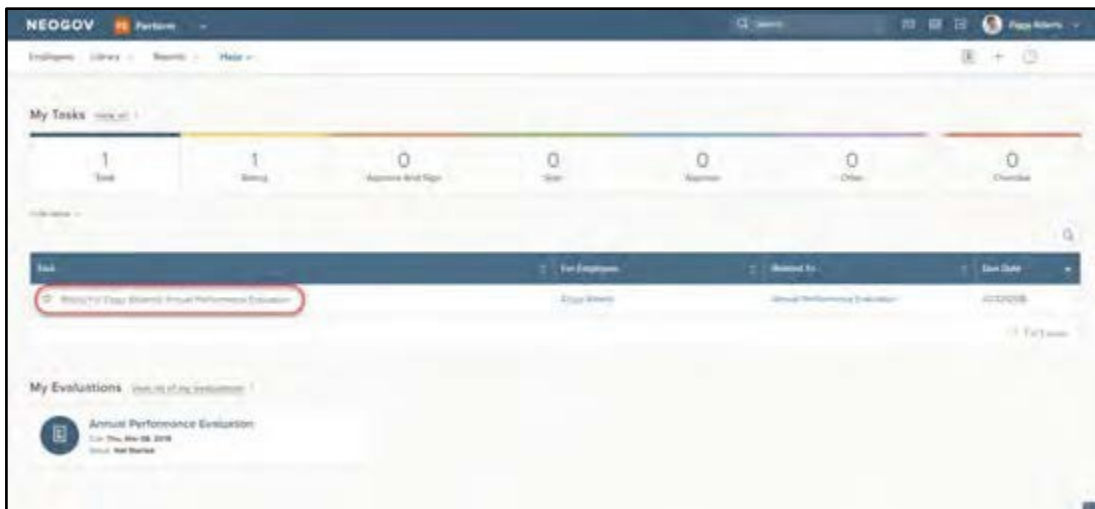


Figure 32: Self Rating Task

You are then re-directed to the Rating Form.

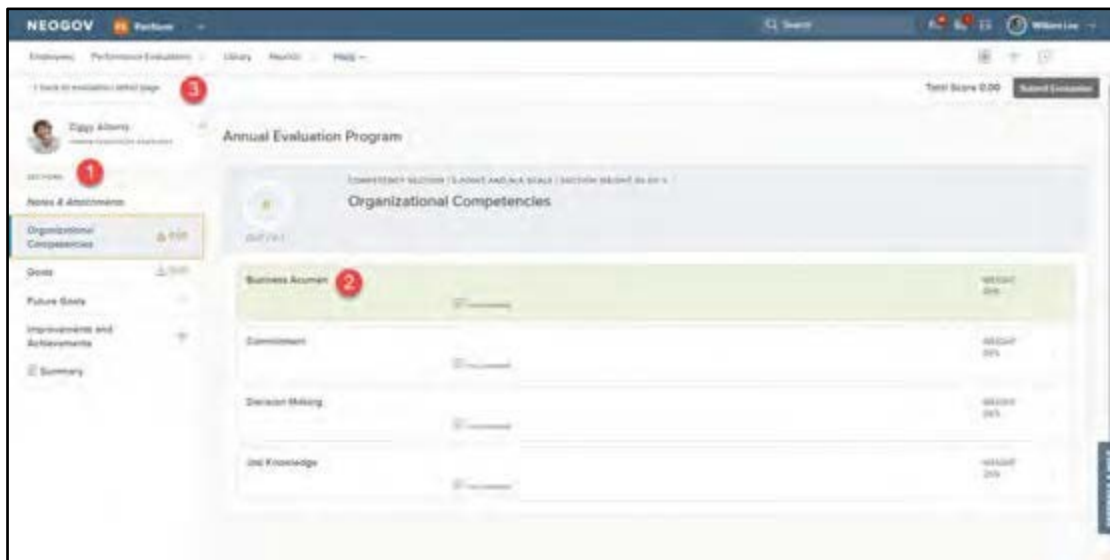


Figure 33: Rating Form

1. To **view and rate** the different items, click the various sections
 - a. If **Notes & Attachments** are provided, select print to download the notes
 - b. To download the attachment, select the attachment name



Figure 34: Notes and Attachments

2. To rate an item, click an item name, e.g. *Business Acumen*, within a section, and a fly-out of the **Rating Card** appears (see below for further information)
3. To leave the rating card and return to the evaluation detail page, select **back to evaluation detail page**

The following legend can be used to identify the different symbols in the evaluation sections:

	= Required section, action required
	= Read only
	= Section completed

Figure 35: Evaluation Symbols

Upon selecting the item name, the rating card fly-out appears:

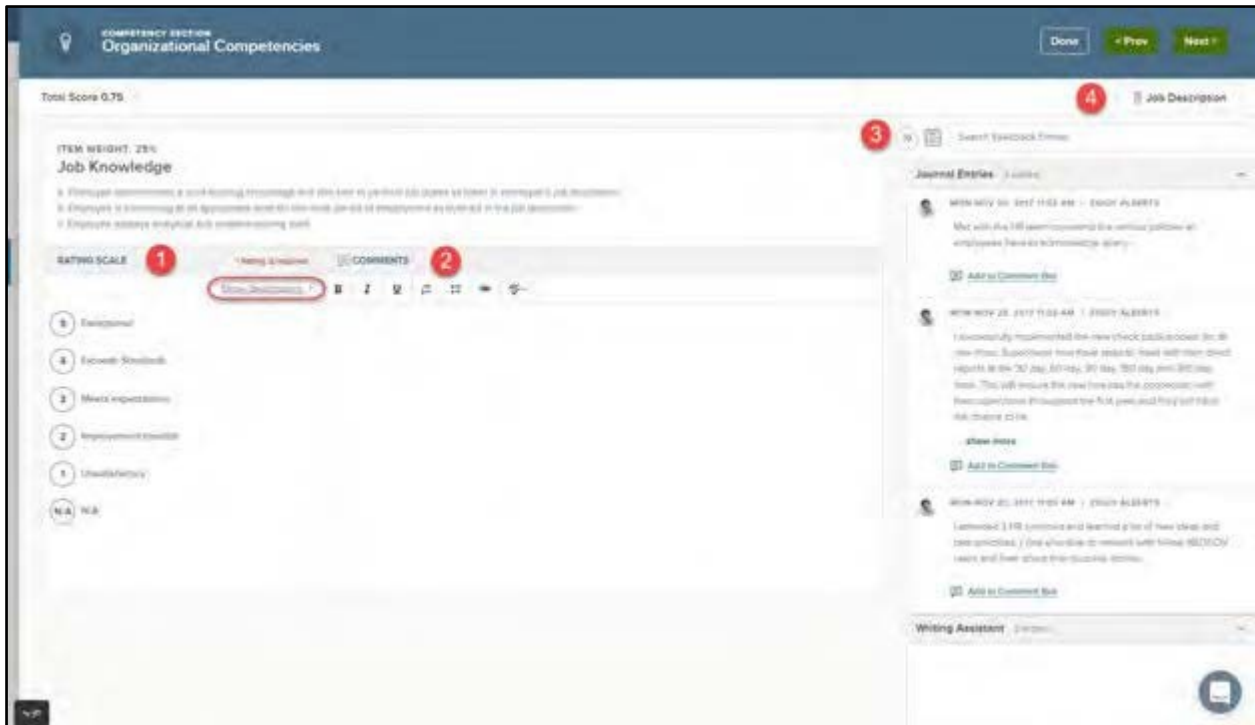


Figure 36: Rating Card

1. If provided by HR, you 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. Per HR configuration, required comments are 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**, **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
4. Per HR configuration, you are able to see detailed information about your position by selecting **Job Description**

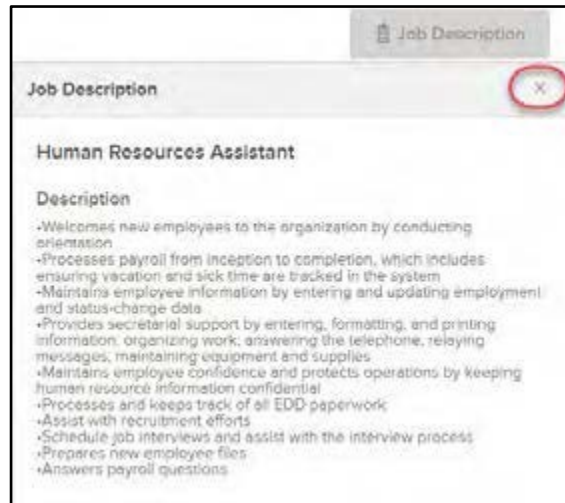


Figure 37: Job Description

To exit the Job Description, select the 'X' icon. You are then brought back to the Feedback Entries view.

The Overall Rating is determined per your agency's evaluation process. You may be required to select an Overall Rating for **TIP!** evaluation, or the Overall Rating defaults automatically without any ability to change. In other cases, there may be no rating scale and only comments can be entered, or an overall section may not appear at all,

Once all required rating and/or comments are complete, select the **Submit Evaluation** button in the top right corner.

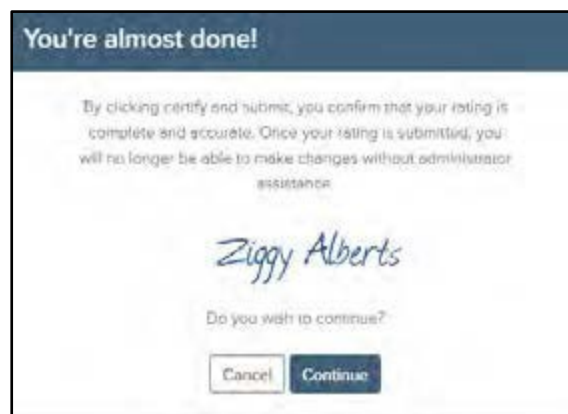


Figure 38: Evaluation Submitted Message

You receive a confirmation message. Once the evaluation is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click **Cancel**. Otherwise, select **Continue**.

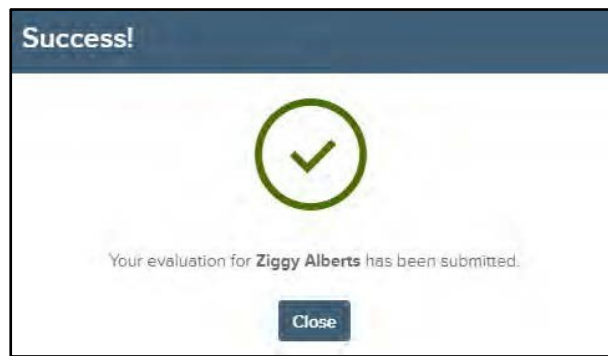


Figure 39: Evaluation Submitted Success Message

Once your evaluation has been successfully submitted, your Manager is notified.

Signing an Evaluation (Optional)

Who Should Use This Section

When the evaluation has been completed by all parties, including raters and approvers, you may be required to **sign** the evaluation acknowledging that you have received and reviewed the content.

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 **NEGOV** in the top left corner. Here, you see the task to **Sign** the completed evaluation.

Click the signature task from the task list on your Dashboard

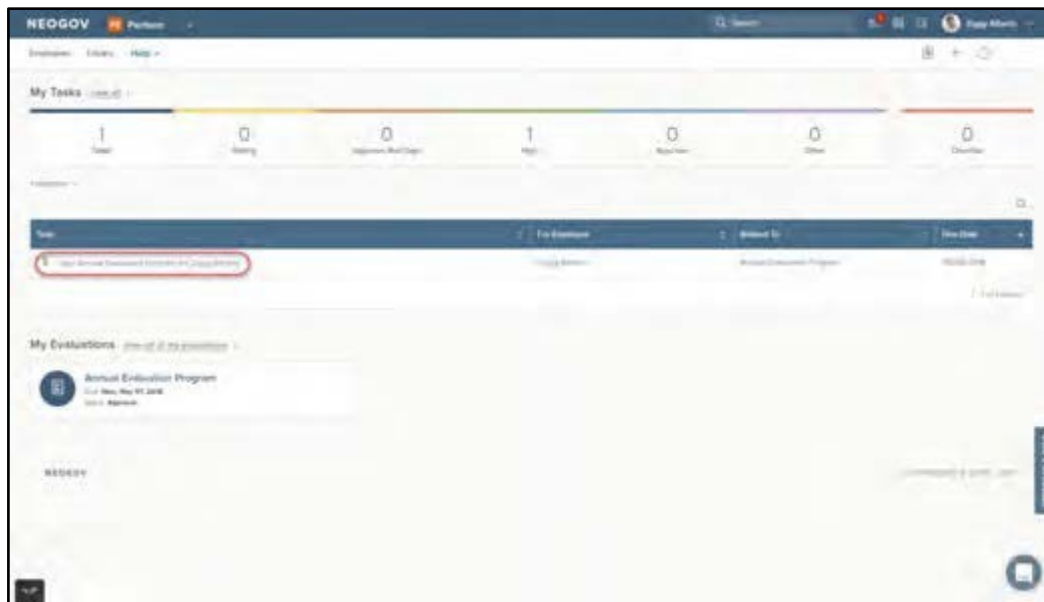


Figure 40: After Rating Signature Task

You are redirected to the After Ratings Form.

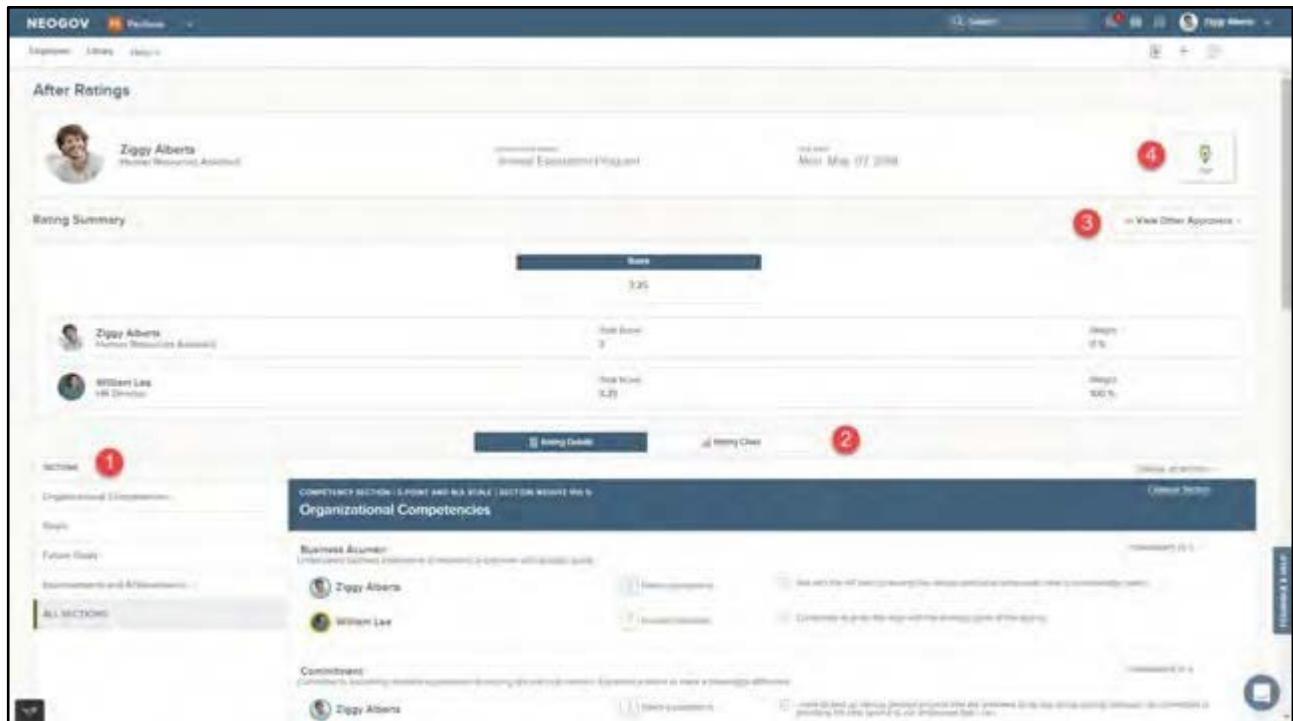


Figure 41: After Ratings Form – Signature Task

1. Navigate through the various **Sections** by clicking on the name
 - Scroll through each section to review the ratings and any comments provided
2. Toggle between the **Rating Details** or the **Rating Chart**
 - 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 fly-out appears with all other approver information
4. Once you have reviewed the completed evaluation, select the **Sign** button
 - A fly-out appears with the signature box and an optional 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**.

Tips and Tricks

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 HR Admin. 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 HR Admin.

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/>