

A network diagram with various sized purple and blue circles connected by thin white lines, set against a dark blue background.

NEOGOV Perform Online System Guide

A photograph of a city waterfront featuring a large Ferris wheel, modern buildings, and a body of water under a clear blue sky.

OHRM Office of Human
Resources Management

Introduction to this Guide

Who should use this guide?

- **Executive Branch general schedule employees** covered by **Administrative Procedure (AP) 217-A – Performance Management Program** (effective July 1, 2022)
- The AP 217-A policy can be accessed on the County Intranet [online here](#)

How do I use this guide?

- Start by **reviewing the [Contents page](#)** for a list of the steps in this guide on how to complete evaluations in the on-line system
- Each step section of this guide includes **step-by-step instructions and videos** on how to complete employee performance management tasks

Help! I'm trying to follow the steps in the guide but am having issues.

- Contact your **Agency Performance Manager** listed on the [Employee Performance Management website](#)
- For **additional support**, email EmployeePerformance@co.pg.md.us with **specific details** about the issue you are seeing, including a **screenshot of error messages**

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(1) hold down your **Ctrl** button on your keyboard and (2) **click the underlined section** below.

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For details on the overall employee performance management policy and process,
visit the [County Employee Performance Management website](#).

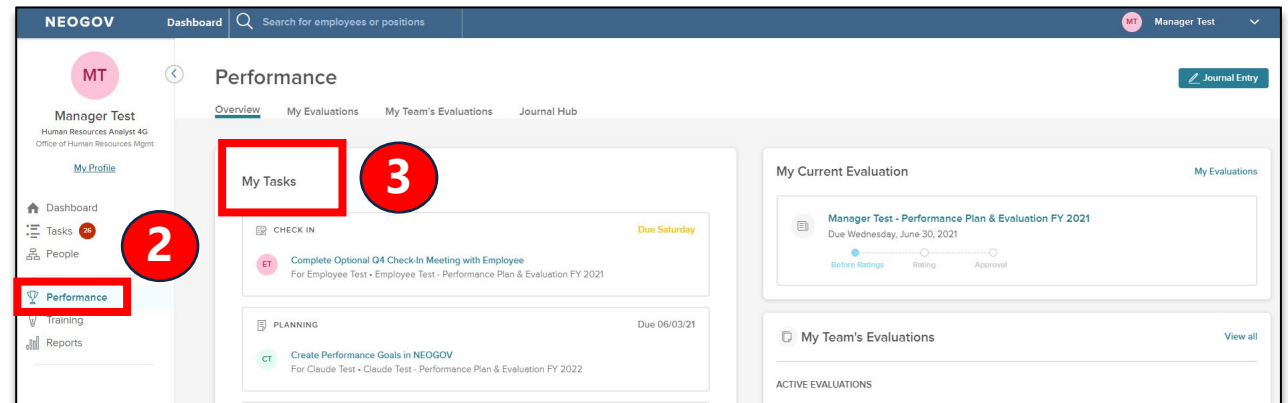
How to Access Employee Performance Management Tasks in NEOGOV

1) [Click this link to log into NEOGOV](#) with your County email address and password

1. Use the **same login information** you use to log into your County email account
2. Make sure you use the **Google Chrome** or **Microsoft Edge** browser to access NEOGOV.
3. **You must use the above link to access NEOGOV.** You will not be able to log into NEOGOV from the public NEOGOV website.

2) Click on **Performance** in the left-hand menu

3) View the list under the **My Tasks** section to see open tasks for performance evaluations for yourself or direct reports



Performance Planning - Before Ratings

Step 1: Create Fiscal Year

Performance Goals in NEOGOV

Step-by-step instructions and videos

Step 1: Create Fiscal Year Performance Goals in NEOGOV

Step 1b: Immediate Supervisor creates employee performance goals

1) Find and click the task for creating performance goals for the employee

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Add Goals* button

3) Select *New Goal* from the dropdown menu

The screenshot displays the NEOGOV web application. At the top, a 'My Tasks' modal window is open, showing a task titled 'Create Fiscal Year Performance Goals in NEOGOV' with a due date of 12/06/21. A red circle with the number '1' is placed over the task. Below this, the main interface is visible. On the left, the 'Add/Edit Content' section shows details for employee 'Claude Test', including their position 'Administrative Specialist 1G' and department 'Office of Human Resources Mgmt'. A 'Submit Content' button is at the bottom of this section. On the right, the 'Performance Goals' section is active, showing a '+ Add Goals' button highlighted with a red circle '2'. A dropdown menu is open below this button, with the 'New Goal' option highlighted by a red circle '3'.

Step 1: Create Goals

Step 1b: *Immediate Supervisor* creates employee performance goals (continued)

4) Complete the *Add Goal* form:

- **Goal Name**
- **Goal Due Date**
- **Category:** Select *Employee Goal*
- **Description**

5) If needed, use the **Additional Settings** to assign a priority level to the goal or the **Reminder Settings** to schedule reminders

6) Click **Save and Add Another** to save this goal and create a new goal **OR** click **Save** to save this goal and return to the main page

The screenshot shows the 'Add Goal' form interface. A red box highlights the main form fields: 'Goal Name' (containing 'SMART Performance Goal'), 'Goal Due Date' (06/30/2021), 'Category' (Employee Goal), and 'Description'. A red circle with the number '4' is placed to the left of this box. Another red circle with the number '5' is placed to the left of the 'ADDITIONAL SETTINGS' and 'REMINDER SETTINGS' sections. A third red circle with the number '6' is placed to the left of the 'Save and Add Another' and 'Save' buttons at the top right of the form.

Step 1: Create Goals

Step 1b: Immediate Supervisor creates employee performance goals (continued)

7) Review the new goals:

- To edit a goal, click the **pencil** icon
- To delete a goal, click the **X** icon

8) Click the **Submit**

Content button. If content is not submitted, the goal will not be seen by the employee.

9) In the pop-up window, **click the Yes, I'm Finished** button to submit the goals

NEO GOV PE Perform

Dashboard Employees Performance Evaluations Library Reports Help

GOAL SECTION | PGCG RATING SCALE

Performance Goals

These are the performance goals to be evaluated at the end of the fiscal year.

Items	Description	Actions
SMART Performance Goal		
SMART Performance Goal 2		

Employee: Claude Test
Position: Administrative Specialist 1G
Department: Office of Human Resources Mgmt
Evaluation: claudie
Evaluation Due Date: Wed, Jun 30, 2021

Submit Content

Submit Content

Are you sure you are finished with adding content for this evaluation ?

Performance Goals: Item(s) Added

Performance Planning – Before Ratings

Step 2: Discuss Fiscal Year

Performance Goals with Employee

Step-by-step instructions

Step 2: Discuss Fiscal Year Performance Goals with Employee

Immediate Supervisor discusses performance goals with employee

After meeting with the employee to discuss their performance goals:

1) Find and click the task for discussing performance goals with the employee

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) In the pop-up sidebar, add any comments as needed

3) Click the *Complete Task* button

1

Task	For Employee
Sign Employee Test - Performance Plan & Evaluation FY 2021 for Employee Test	Employee Test
<input checked="" type="checkbox"/> Discuss Performance Goals with Employee	Claude Test

2

3

Task Detail

Cancel **Complete Task**

Title
Discuss Performance Goals with Employee

Related to
Claude Test - Performance Plan & Evaluation FY 2021

Due Date
05/19/2021

Description
During this step, the supervisor should meet with the employee to discuss performance goals for the current fiscal year.

Comments
We met on July 25th to discuss the performance goals.

Performance Planning – Before Ratings

Step 3: Finalize Employee

Performance Goals for the Fiscal Year


Step-by-step instructions

Step 3: Finalize Employee Performance Goals for the Fiscal Year

Immediate Supervisor finalizes and signs the performance goals with any revisions as needed

1) Find and click the task for finalizing employee performance goals

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

Task	For Employee
 Sign Employee Test - Performance Plan & Evaluation FY 2021 for Employee Test	Employee Test
<input checked="" type="checkbox"/> Finalize Employee Performance Goals	Claude Test

2) Revise goals as needed and submit the goals by following the steps outlined in [Phase 1: Create Goals](#)

3) **NEOGOV Perform** will email the employee to let them know that they need to log into the system to review and sign their performance goals

Performance Planning

Step 4: Employee Sign - Acknowledgement Receipt & Discussion of Performance Goals

Step-by-step instructions

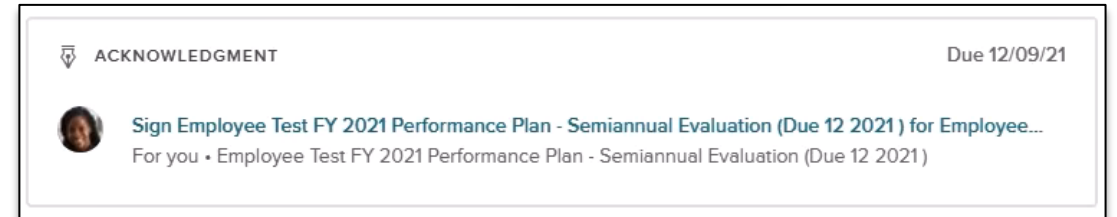
Phase 4: Acknowledge Receipt & Sign Goals

Employee signs performance goals

1) Find and click the task for signing employee performance plan goals

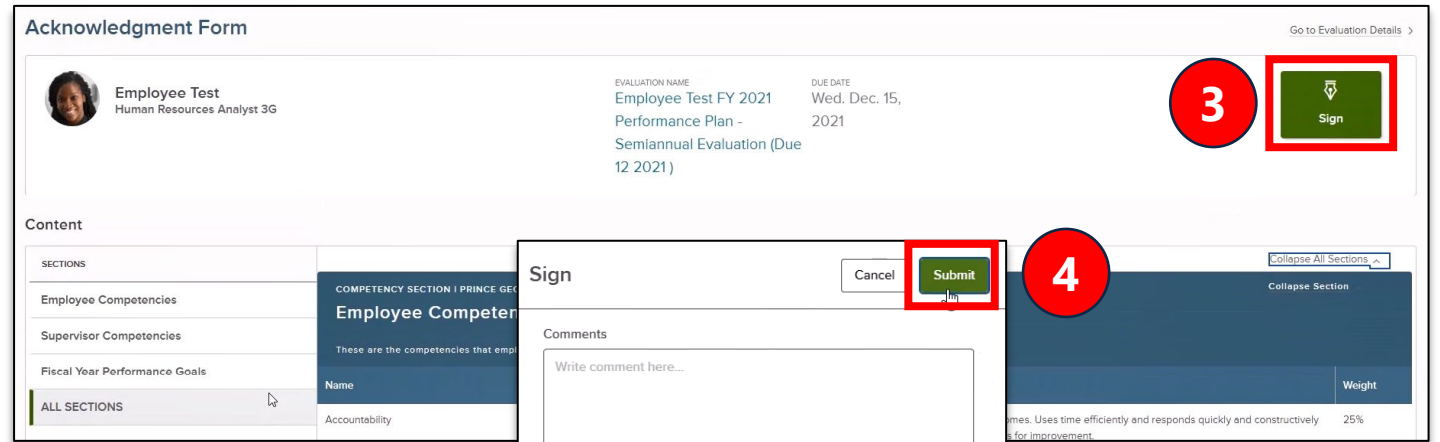
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

1



2) Employee to review the performance plan and goals

2



3) Click the *Sign* button

4) In the signature window, add any comments as needed and click the *Submit* button

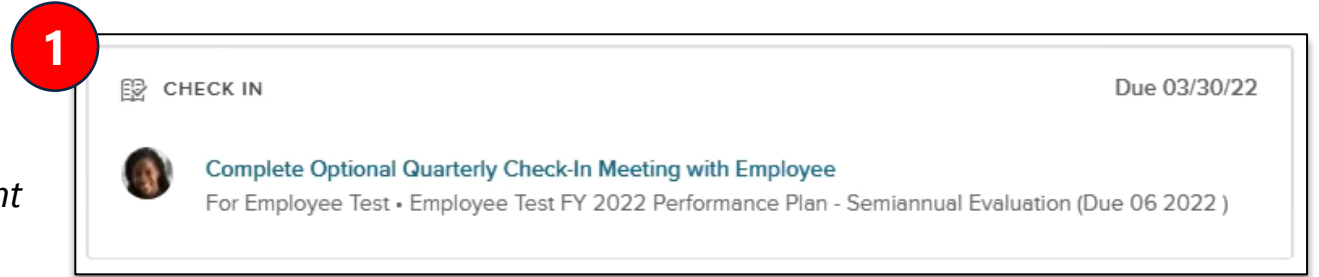
Performance Support

Step 4a: Complete Quarterly Midpoint Check-In Meeting with Employee

Step-by-step instructions


Midpoint Check-In | Access the check-in form

1) Find and click the task for completing the quarterly check-in form
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

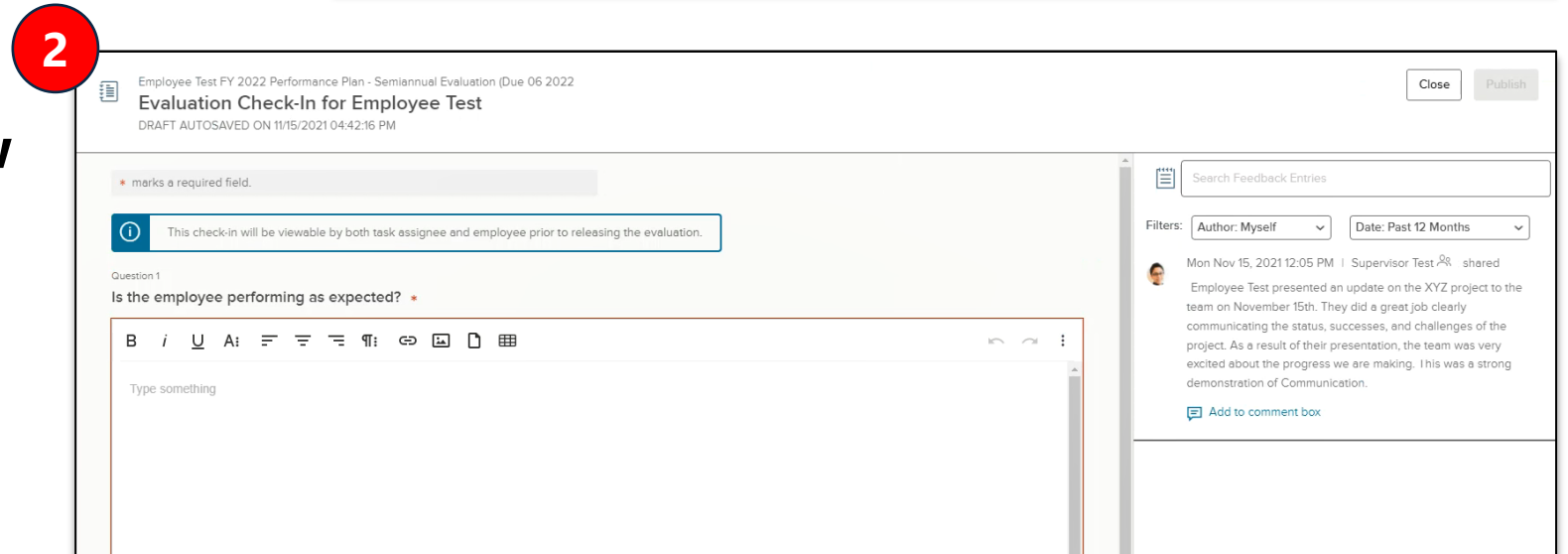


1

CHECK IN Due 03/30/22

 **Complete Optional Quarterly Check-In Meeting with Employee**
For Employee Test • Employee Test FY 2022 Performance Plan - Semiannual Evaluation (Due 06 2022)

2) The check-in form window will pop up on your screen.



2

Employee Test FY 2022 Performance Plan - Semiannual Evaluation (Due 06 2022)
Evaluation Check-In for Employee Test
DRAFT AUTOSAVED ON 11/15/2021 04:42:16 PM

marks a required field.

i This check-in will be viewable by both task assignee and employee prior to releasing the evaluation.

Question 1
Is the employee performing as expected? *

B *i* U **A:** **≡** **≡** **≡** **¶:** **☰** **📎** **📄** **📱**

Type something

Search Feedback Entries

Filters: Author: Myself | Date: Past 12 Months

Mon Nov 15, 2021 12:05 PM | Supervisor Test ^{PR} shared
Employee Test presented an update on the XYZ project to the team on November 15th. They did a great job clearly communicating the status, successes, and challenges of the project. As a result of their presentation, the team was very excited about the progress we are making. I this was a strong demonstration of Communication.

+ Add to comment box

Mid-Point Check-Ins | Complete the check-in form

Employee Test FY 2022 Performance Plan - Semiannual Evaluation (Due 06 2022)
Evaluation Check-In for Employee Test
DRAFT AUTOSAVED ON 11/15/2021 04:42:17 PM

* marks a required field.

1 This check-in will be viewable by both task assignee and employee prior to releasing the evaluation.

Question 1
Is the employee performing as expected? *

Type something

Press Alt - F10 to move to toolbar. Press ALT - 0 for Help.

Question 2
What resources or support are needed to support the employee's progress? *

Close Publish

Search Feedback Entries

Filters: Author: All Date: Past 12 Months

Mon Nov 15, 2021 12:05 PM | Supervisor Test shared

Employee Test presented an update on the XYZ project to the team on November 15th. They did a great job clearly communicating the status, successes, and challenges of the project. As a result of their presentation, the team was very excited about the progress we are making. I his was a strong demonstration of Communication.

Add to comment box

Add to comment box for...

Is the employee performing as expected?

What resources or support are needed to support the employee's progress?

A great example of Communication !

Add to comment box

1
Type in responses to the questions in the check-in form

2
As needed, add text from **previous journal entries** written about the employee

3
Click the **filters** to view journal entries from specific authors or time periods

4
To add a journal entry to the check-in form, click **Add to comment box** and select which question the text should go under

5
Click the **Publish** button to submit the form
(the button will be green and clickable when the form has been filled out)



Performance Evaluation

Step 5: Ratings – Complete Evaluation

Step-by-step instructions

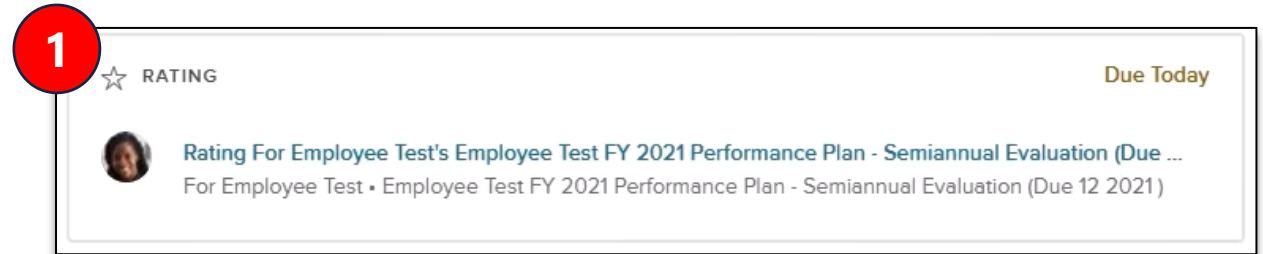
Step 5: Complete Evaluation | Rating

Step 5a: *Employee* completes *optional* self-evaluation

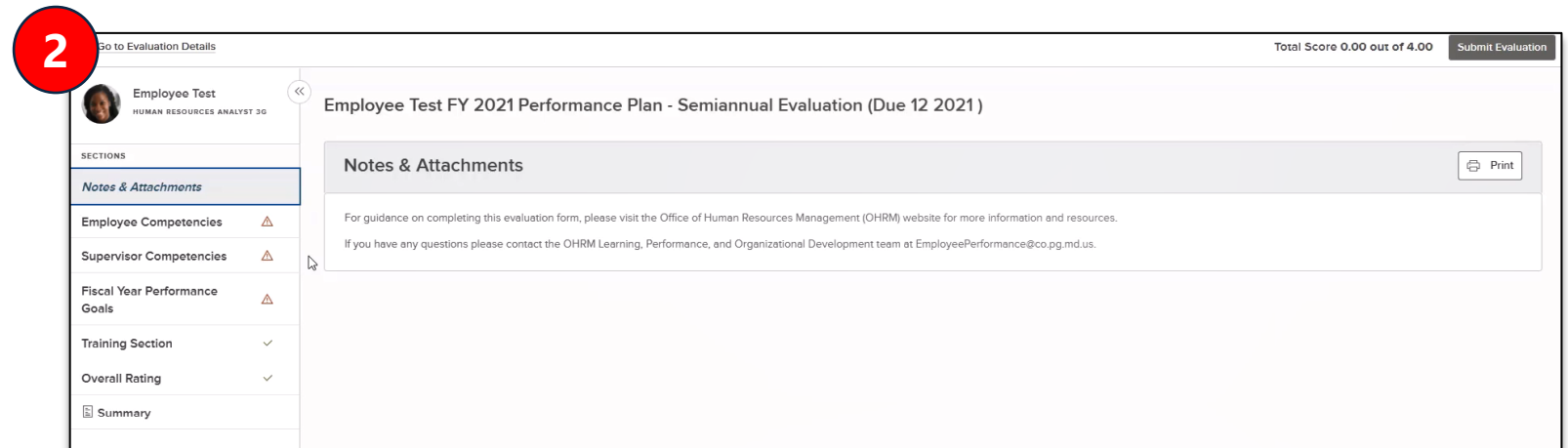
Step 5b: *Immediate Supervisor* completes employee evaluation

1) Find and click the task rating for employee to complete the evaluation

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))



2) Review the evaluation form, starting with the *Notes & Attachments* section with instructions



Step 5: Complete Evaluation | Access Competencies Section

Step 5a: *Employee* completes optional self-evaluation

Step 5b: *Immediate Supervisor* completes employee evaluation

1) On the main evaluation page, click on the *Employee Competencies* section

- If the evaluation is for an employee supervising direct reports, you will need to complete an additional ***Supervisor Competencies*** section
- The *Supervisor Competencies* section would be completed following the **same steps** as for completing the *Employee Competencies* section

The screenshot displays the 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)' page. The left sidebar contains a navigation menu with sections: 'Notes & Attachments', 'Employee Competencies', 'Supervisor Competencies', 'Fiscal Year Performance Goals', 'Training Section', 'Overall Rating', and 'Summary'. The 'Employee Competencies' section is highlighted with a red box and a red circle with the number 1. The main content area shows the 'Employee Competencies' section with a list of competencies: 'Accountability', 'Collaboration', 'Communication', and 'Integrity'. The 'Accountability' competency is highlighted with a red box and a red circle with the number 2. The 'Accountability' competency is listed with a weight of 25% and a 'no comment' button. The 'Supervisor Competencies' section is also highlighted with a red box and a red circle with the number 2.

2) Click the specific competency for which you are providing a rating and comment

Step 5: Complete Evaluation | Review Rating Form Resources

Step 5a: Employee completes optional self-evaluation

Step 5b: Immediate Supervisor completes employee evaluation

The screenshot displays the 'COMPETENCY SECTION Employee Competencies' interface. It features a 'RATING SCALE' on the left with four levels: 1 Does Not Meet Expectations, 2 Needs Development, 3 Meets Expectations, and 4 Exceeds Expectations. The main content area shows a competency titled 'Accountability' with a description and a 'Show descriptions >' button. On the right, there is a 'COMMENTS' section with a text input field and a toolbar. A list of feedback entries is visible, including 'Reviewer Entries', 'Journal Entries', 'Check-In Entries - Supervisor Test', and 'Writing Assistant'. At the top right, there are buttons for 'Job Description' and 'View Training Activity'. Eight numbered callouts provide instructions: 1. Review the competency description; 2. Click 'Show descriptions' to review descriptions for each rating scale level; 3. Click 'Job Description' to review the employee's job description; 4. Click 'Reviewer Entries' to review previously submitted evaluation ratings and comments; 5. Click 'Journal Entries' to review and add language into the Comments section of this form from journal entries into the Comments section of this form; 6. Click 'Check-In Entries' to review and add language into the Comments section of this form from check-in entries into the Comments section of this form; 7. Click 'Writing Assistant' to review and add language into the Comments section of this form from pre-written comments about how this competency is demonstrated at each rating level; 8. Click 'View Training Activity' to open a separate browser window with the employee's training history in the County Learning Management System.

Step 5: Complete Evaluation | Evaluate Competencies

Step 5a: *Employee* completes optional self-evaluation

Step 5b: *Immediate Supervisor* completes employee evaluation

COMPETENCY SECTION
Employee Competencies

Total Score 0.00 out of 4.00

ITEM WEIGHT: 25%
Accountability
Takes personal ownership and responsibility for the quality and timeliness of work outcomes. Uses time efficiently and responds quickly and constructively when confronted with challenges. Demonstrates openness to feedback and suggestions for improvement.

* Fields are required.

RATING SCALE * Rating is required
Show descriptions >

- 1 Does Not Meet Expectations
- 2 Needs Development
- 3 Meets Expectations
- 4 Exceeds Expectations

COMMENTS
Type something

Next > Done

Search Feedback Entries

Reviewer Entries 1 entries
Journal Entries 1 entries
Check-In Entries - Supervisor Test 4 entries
Writing Assistant 4 entries

1 Select a rating for the employee's performance with the competency

2 Type in comments about the employee's performance with the competency

3 Click the **Next** button to move to the next part of the rating form

OR
Click the **Done** button to close this section and return to the main evaluation form page

2 Type in comments about the employee's performance with the competency

Step 5: Complete Evaluation | Access Performance Goals Section

Step 5c: *Employee* completes optional self-evaluation

Step 5d: *Immediate Supervisor* completes employee evaluation

1) On the main evaluation page, **click on the *Fiscal Year Performance Goals* section**

2) **Click the specific performance goal** for which you are providing a rating and comment

The screenshot displays the 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)' page. The left sidebar shows a navigation menu with 'Fiscal Year Performance Goals' highlighted by a red box and a red circle with the number '1'. The main content area shows a table of performance goals. The first goal, 'Respond to Customer Support Requests', is highlighted by a red box and a red circle with the number '2'. The table includes columns for goal description, comment status, due date, and weight.

Goal Description	Comment Status	Due Date	Weight
Respond to Customer Support Requests	no comment	12/30/2022	33.34%
Deliver Community Education Events	no comment	03/30/2023	33.33%
Launch New Online System	no comment	06/28/2023	33.33%

Step 5: Complete Evaluation | Evaluate Performance Goals

Step 5e: *Employee* completes optional self-evaluation

Step 5f: *Immediate Supervisor* completes employee evaluation

Complete the rating form for each employee performance goal following the same process used to rate performance with competencies (see prior pages in this guide)

Note: The rating form for employee performance goals do not include the *Writing Assistant* resource

GOAL SECTION
Fiscal Year Performance Goals

Total Score 2.39 out of 4.00

ITEM WEIGHT: 33.34% | DUE DATE: 12/30/2022
Respond to Customer Support Requests
By December 31, respond to at least 80% of customer support requests within two business days to resolve or provide a status update on the request in support of the Agency and County's goals of Increasing County Government responsiveness to Prince Georgians

* Fields are required.

RATING SCALE * Rating is required **COMMENTS**

Show descriptions >

- 1 Does Not Meet Expectations
- 2 Needs Development
- 3 Meets Expectations
- 4 Exceeds Expectations

Type something

Press Alt - F10 to move to toolbar. Press ALT - 0 for Help.

Search Feedback Entries

Reviewer Entries 1 entries [Expand](#)

Journal Entries 1 entries [Expand](#)

Check-In Entries - Supervisor Test 4 entries [Expand](#)

Step 5: Complete Evaluation | Access Training Section

Step 5g: Immediate Supervisor completes employee evaluation

This *optional* section is only available in the employee evaluation completed by the supervisor

1) On the main evaluation page, **click on the *Training Section* link**

2) To assign trainings to the employee, **click the *Add Training* button**

The screenshot displays a web interface for an employee evaluation. On the left, a sidebar menu lists various sections: 'Notes & Attachments', 'Employee Competencies', 'Supervisor Competencies', 'Fiscal Year Performance Goals', 'Training Section', 'Overall Rating', and 'Summary'. The 'Training Section' is highlighted with a red box and a red circle containing the number '1'. The main content area shows the 'Training Section' header, a '+ Add Training' button (highlighted with a red box and a red circle containing the number '2'), and a message stating 'No training in this section' with a document icon.

Step 5: Complete Evaluation | Assign Trainings

Step 5h: Immediate Supervisor completes employee evaluation

This *optional* section is only available in the employee evaluation completed by the supervisor

- 1) In the pop-up window, **search for trainings** using the search bar at the top or by clicking the Categories menu on the left-hand side
- 2) **Click the Add Training button** to assign a specific training
 - If needed, continue to search for and select additional trainings without closing the window
- 3) **Click the Save button**

The screenshot shows the 'Assign Training' interface. A red circle with the number '1' points to the search bar and the 'All Courses' menu. A red circle with the number '2' points to the '+ Add Training' button. A red circle with the number '3' points to the 'Save' button. The search bar contains the text 'writing'. The results list two courses: 'Effective Writing for Business' (Course Code: BV78, Length: 0h 20m) and 'Effective Writing Skills' (Course Code: SVL_102833, Length: 2h 7m). The 'Effective Writing for Business' course has a 'Training Added' status, and the 'Effective Writing Skills' course has an '+ Add Training' button.

Step 5: Complete Evaluation | Unassign Trainings

Step 5i: Immediate Supervisor completes employee evaluation

This *optional* section is only available in the employee evaluation completed by the supervisor

1) In the main *Training Section*, **click the trash can icon** to unassign trainings that were assigned while completing this form, if needed

The screenshot displays the 'Employee Test' evaluation interface. At the top right, it shows 'Total Score 3.53 out of 4.00' and a 'Submit Evaluation' button. The main content area is titled 'Employee Test FY 2022 Performance Plan - Semiannual Evaluation (Due 06 2022)'. On the left, a sidebar lists sections: 'Notes & Attachments', 'Employee Competencies', 'Supervisor Competencies', 'Fiscal Year Performance Goals', 'Training Section' (highlighted), and 'Overall Rating' (4.00). The 'Training Section' is expanded, showing two training items: 'Effective Writing for Business' (Course Code: BV78, Length: 0h 20m) and 'Effective Writing Skills' (Course Code: SVL_102833, Length: 2h 7m). Each item has a trash can icon to its right, with the first icon highlighted by a red square. An '+ Add Training' button is located at the top right of the training list.

Step 5: Complete Evaluation | Access Overall Rating Section

Step 5j: *Employee* completes optional self-evaluation

Step 5k: *Immediate Supervisor* completes employee evaluation

1) On the main evaluation page, **click on the Overall Rating section**

2) **Click the Overall Rating item**

- The overall rating displayed is automatically calculated from ratings in the competencies and performance goals section

The screenshot displays the evaluation interface for 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)'. The interface includes a sidebar on the left with a list of sections: 'Notes & Attachments', 'Employee Competencies', 'Supervisor Competencies', 'Fiscal Year Performance Goals', 'Training Section', and 'Overall Rating'. The 'Overall Rating' section in the sidebar is highlighted with a red box and a red circle containing the number '1'. The main content area shows the 'Overall Rating' section, which is also highlighted with a red box and a red circle containing the number '2'. The overall rating is displayed as '4 Exceeds Expectations' with a 'no comment' button. The total score is shown as '3.61 out of 4.00' and a 'Submit Evaluation' button is visible in the top right corner.

Step 5: Complete Evaluation | Complete Overall Rating Form

Step 5l: Employee completes optional self-evaluation

Step 5m: Immediate Supervisor completes employee evaluation

1) Type in comments in the *Comments* section

Note: The overall rating form does not include the *Job Description* reference or the *Writing Assistant* resource

2) Click the *Done* button

The screenshot shows the 'Overall Rating' section of an evaluation form. The header includes 'EVALUATION OVERALL SECTION' and 'Overall Rating'. A 'Done' button is highlighted with a red box and a red circle containing the number '2'. The main content area shows 'Overall Rating' with a note: 'This overall rating is automatically calculated based on the other ratings in this evaluation form.' Below this is a 'COMMENTS' section, which is highlighted with a red box and a red circle containing the number '1'. The comments section has a rich text editor with a toolbar and a text area containing the placeholder text '|type something'. On the right side, there is a search bar for 'Feedback Entries' and a list of entry types: 'Reviewer Entries' (1 entry), 'Journal Entries' (1 entry), and 'Check-In Entries - Supervisor Test' (4 entries), each with an 'Expand' button. A 'View Training Activity' button is also visible in the top right corner.

Step 5: Complete Evaluation | Access Summary Section

Step 5n: *Employee* completes optional self-evaluation

Step 5o: *Immediate Supervisor* completes employee evaluation

1) On the main evaluation page, **click on the Summary section**

2) Review the **Rating Details tab** and **click Expand all cards** to see a complete view of all evaluation ratings and comments provided

3) Click the **Rating Chart tab** to view graphs comparing the average ratings provided on the optional employee self-evaluation (if available) and supervisor's employee evaluation for competencies and performance goals

The screenshot shows the 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)' page. The 'Summary' tab is highlighted with a red box and a red circle labeled '1'. The 'RATING DETAILS' tab is highlighted with a red box and a red circle labeled '2'. The 'RATING CHART' tab is highlighted with a red box and a red circle labeled '3'. A red arrow points from the 'Expand all cards' button to the 'RATING CHART' tab. The overall rating is 4.00. The page title is 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)'. The total score is 3.61 out of 4.00. The page includes a 'Submit Evaluation' button and a 'Print Current State' button.



Step 5: Complete Evaluation | Submit Evaluation Form

Step 5p: *Employee* completes optional self-evaluation

Step 5q: *Immediate Supervisor* completes employee evaluation

- 1) From any section of the evaluation form, **click the *Submit Evaluation* button**
If needed, click the *Print Current State* button to print and/or save a copy of the evaluation form before signing – the signed evaluation form can also be printed later
- 2) In the pop-up window, **click the *Continue* button** to confirm your submission
- 3) In the pop-up window, **click the *Close* button**

The screenshot displays the 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)' interface. The top right corner shows a 'Total Score 3.61 out of 4.00' and a 'Submit Evaluation' button (1). Below it is a 'Print Current State' button. The main content area is divided into 'RATING DETAILS' and 'RATING CHART'. A 'COMPETENCY SECTION' is visible, with a 'You're almost done!' pop-up window (2) overlaid. This window asks 'Do you wish to continue?' and has a 'Continue' button highlighted in red. A 'Success!' pop-up window (3) is also overlaid, stating 'Your evaluation for Employee Test has been submitted.' and has a 'Close' button highlighted in red. The sidebar on the left lists sections like 'Notes & Attachments', 'Employee Competencies', 'Supervisor Competencies', 'Fiscal Year Performance Goals', 'Training Section', and 'Overall Rating' (4.00).

Step 5: Complete Evaluation | Access and Sign Evaluation

Step 5r: Immediate Supervisor's Supervisor reviews and signs evaluation

1) Find and click the task for signing the performance evaluation

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Approve & Sign* button

- If the evaluation needs to be modified, follow the [steps for denying the evaluation](#)

3) In the pop-up window, type in comments as needed

4) Click the *Submit* button

The screenshot displays the NEOGOV system interface for approving and signing an evaluation. It is divided into several sections:

- Task List (Top):** A task card for 'APPROVAL' with a due date of 12/05/21. The task title is 'Approve and Sign Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021) ... For Employee Test - Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)'. A red circle '1' highlights this task.
- Approval Form (Middle):** The main form for the approval. It shows the employee 'Employee Test, Human Resources Analyst 3G' and the evaluation name 'Employee Test FY 2021 Performance Plan - 2021'. A red circle '2' highlights the 'Approve & Sign' button in the top right corner.
- Approve & Sign Pop-up (Center):** A modal window for signing. It has a 'Comments' section with a text area containing 'Write comment here...'. A red circle '3' highlights this text area. Below the comments is a signature field with the handwritten text 'Supervisor Test' and the date 'November 15, 2021'. A red circle '4' highlights the 'Submit' button in the top right of the pop-up.
- Rating Summary (Left):** A sidebar showing the evaluation's rating summary, including sections for 'Employee Competencies'.
- Approval Details (Right):** A sidebar showing the evaluation's details, including a table of ratings and expectations.

Performance Evaluation

Step 6: Approval & Signature

Step-by-step instructions

Step 6: Complete Evaluation | Approval & Signature

Step 6a: Manager's Manager reviews and signs evaluation

If the immediate manager needs to modify the performance evaluation:

- 1) Click the *Deny* button
- 2) In the pop-up window, type in comments as needed
- 3) Click the *Save* button
- 4) The immediate manager [follows the steps](#) for completing and submitting the performance evaluation for approval again by the immediate manager's manager.

The screenshot displays the 'Approval Form' interface. At the top, it shows the user 'Employee Test, Human Resources Analyst 3G' and the evaluation details: 'Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021)'. The due date is 'Wed. Dec. 15, 2021'. There are two buttons: 'Approve & Sign' and 'Deny'. The 'Deny' button is highlighted with a red box and a red arrow pointing to a pop-up window. The pop-up window is titled 'Deny' and has a 'Cancel' button and a 'Save' button. The 'Save' button is highlighted with a red box. Below the 'Deny' title, there is a message '* Fields are required.' and a section for 'Supervisor Test, Human Resources Analyst 4G'. A large text area labeled 'Comments *' is highlighted with a red box, containing the placeholder text 'Write comment here...'. A red circle with the number '1' is next to the 'Deny' title, a red circle with the number '2' is next to the 'Comments' field, and a red circle with the number '3' is next to the 'Save' button.

Performance Evaluation

Step 7: Discuss Performance Evaluation with Employee

Step-by-step instructions

Step 7: Discuss Performance Evaluation with Employee

Access Discussion Task

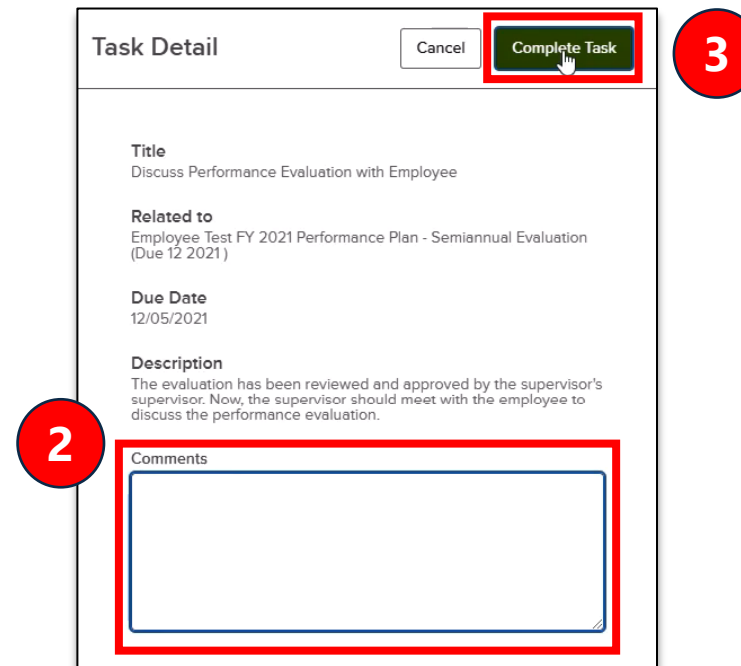
Step 7a: *Immediate Supervisor and Employee* meet to discuss evaluation

After meeting with the employee to discuss their performance evaluation:

1) Find and click the task for discussing the performance evaluation with the employee
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) In the pop-up sidebar, add any comments as needed

3) Click the *Complete Task* button



Phase 7: Discuss Performance Evaluation with Employee |

Approval & Signature

Step 7b: Immediate Manager signs evaluation

1) Find and click the task for signing the performance evaluation

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Approve & Sign* button

- If the manager needs to modify the evaluation, they will need to follow the [steps for denying the evaluation](#)

3) In the pop-up window, type in comments as needed

4) Click the *Submit* button

The screenshot illustrates the approval workflow in NEOGOV. It features a task card (1) for 'APPROVAL' due on 12/05/21, titled 'Approve and Sign Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021) ...'. The main 'Approval Form' (2) shows the employee 'Employee Test, Human Resources Analyst 3G' and the evaluation name 'Performance Plan - 2021'. It includes a 'Rating Summary' table and a 'Comments' text area (3) with a 'Write comment here...' placeholder. A signature field (4) contains the handwritten name 'Supervisor Test' and the date 'November 15, 2021'. The form also has 'Approve & Sign' and 'Deny' buttons, and a 'Submit' button in the pop-up window.

SECTION	Weight
Rating Expectations / 4.00	0 %
Rating Expectations / 4.00	100 %

WEIGHT 33.34 %

Step 7: Approval & Signature | Modify Evaluation (if needed)

Step 7c: Immediate Supervisor signs evaluation

If the supervisor needs to modify the performance evaluation:

- 1) Click the *Deny* button
- 2) In the pop-up window, type in comments as needed
- 3) Click the *Save* button
- 4) [Follow the steps](#) for completing the performance evaluation task, including previously completed approval and discussion steps

The screenshot displays the 'Approval Form' interface. At the top right, there are two buttons: 'Approve & Sign' (green) and 'Deny' (white with a red border). A red arrow points from the 'Deny' button to a pop-up window titled 'Deny'. In this pop-up window, there are 'Cancel' and 'Save' buttons. A red circle with the number '1' is around the 'Deny' button, a red circle with the number '2' is around the 'Save' button, and a red circle with the number '3' is around the 'Comments' text area. The 'Comments' area is a large text box with the placeholder text 'Write comment here...'. The background shows the 'Rating Summary' section with 'Employee Test' and 'Supervisor Test' entries.

Performance Evaluation

Step 8: Acknowledge & Sign Evaluation

Step-by-step instructions

Step 8: Acknowledge & Sign Evaluation | Access and Sign Evaluation

Step 8a: Employee signs evaluation

1) Find and click the task for signing the performance evaluation

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the Sign button

3) In the pop-up window, type in comments as needed

4) Click the Submit button

The screenshot displays the NEOGOV interface for signing an evaluation. It is divided into several sections:

- Task List:** A card labeled 'ACKNOWLEDGMENT' with a due date of 'Due 12/08/21'. The task title is 'Sign Employee Test FY 2021 Performance Plan - Semiannual Evaluation (Due 12 2021) for Employee...'. A red circle '1' highlights this task.
- Acknowledgment Form:** A form titled 'Acknowledgment Form' for 'Employee Test' (Human Resources Analyst 3G). It shows the evaluation date as 'Wed. Dec. 15, 2021'. A red circle '2' highlights the 'Sign' button in the top right corner.
- Sign Pop-up Window:** A modal window titled 'Sign' with 'Cancel' and 'Submit' buttons. A red circle '3' highlights the 'Comments' text area where the user can enter feedback. A red circle '4' highlights the 'Submit' button.
- Rating Summary:** A sidebar on the left showing the 'Rating Summary' for the employee and supervisor.
- Overall Rating:** A section on the right showing the overall rating and weight for the evaluation.

Step 8: Complete & Finalize Evaluation

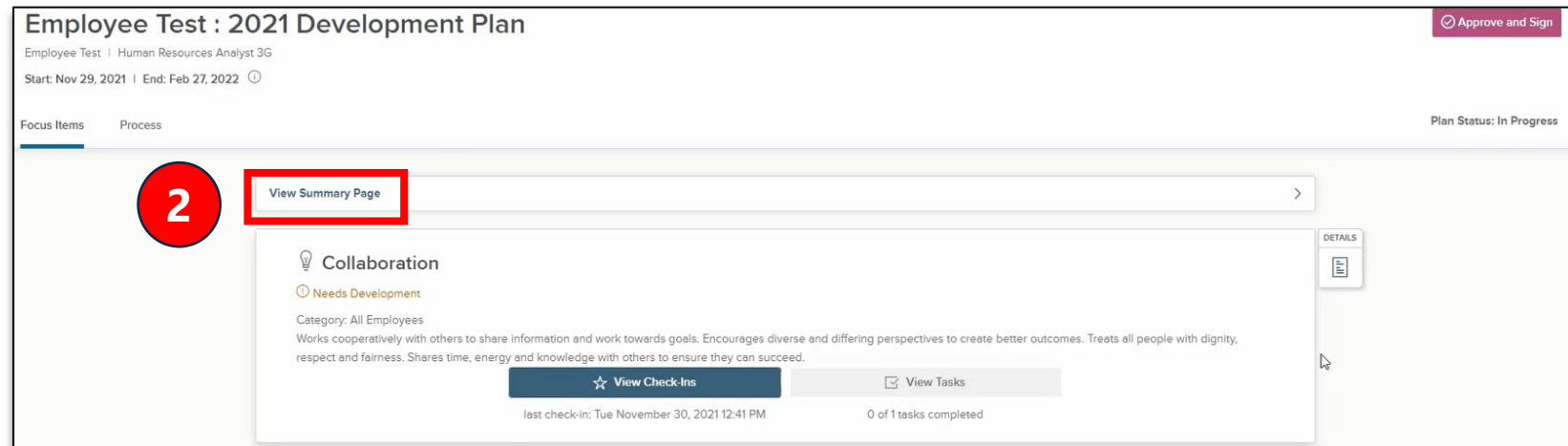
Step 8a: *Employee* signs evaluation

1) Find and click the task for signing the evaluation
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

1



2) Click **View Summary Page** above the development plan items



Step 8: Complete & Finalize Evaluation

Step 8b: *Employee* signs evaluation

3) Review the **Final Rating section** at the top

4) Review **task and check-in details** for each development plan item by clicking *show details* beside each section

5) Click the **Sign** button

6) In the pop-up window, enter any **comments** as needed

7) Click the **Submit Signature** button

The screenshot displays the 'Employee Test : 2021 Development Plan' interface. At the top right, a 'Sign' button is highlighted with a red box and a red circle containing the number 5. Below it, a 'Final Rating' section is highlighted with a red box and a red circle containing the number 3. In the main content area, two 'show details' buttons are highlighted with red boxes and a red circle containing the number 4. A signature pop-up window is open, showing a signature 'Employee Test' and a 'Submit Signature' button highlighted with a red box and a red circle containing the number 7. The 'Comment' section of the pop-up is highlighted with a red box and a red circle containing the number 6. The interface also shows a 'Back to Card View' button, a 'Print' button, and a 'Plan Status: In Progress' indicator.

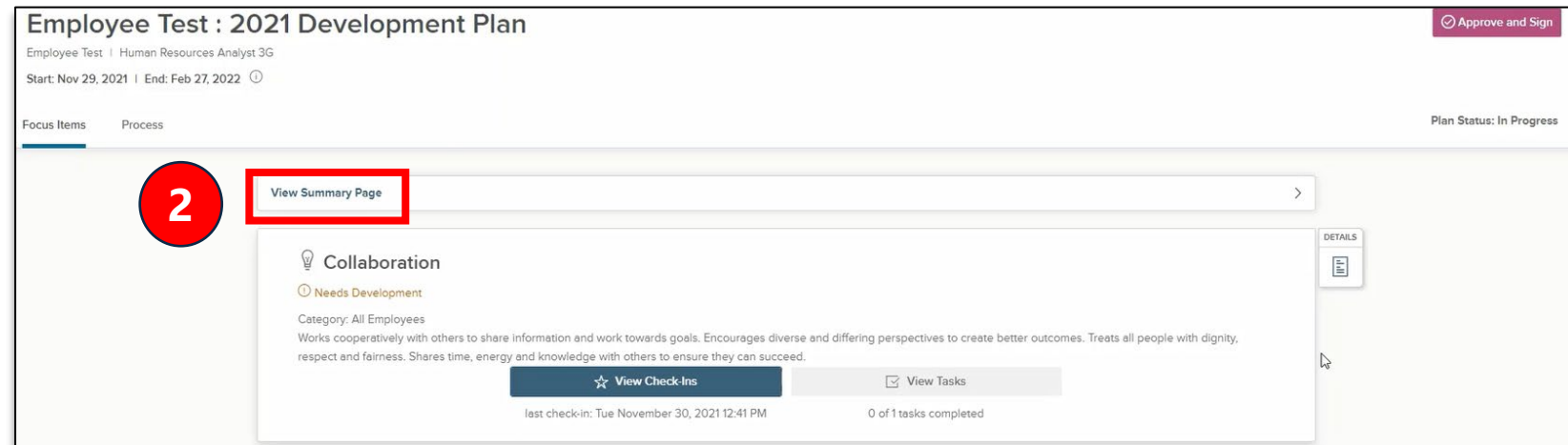
Step 8: Complete & Finalize Evaluation

Step 8c: *Agency Appointing Authority* reviews and signs evaluation

1) Find and click the task for signing the evaluation
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))



2) Click **View Summary Page** above the development plan items



Performance Evaluation

Step 9: Approval & Sign

Step-by-step instructions

Step 9: Approve & Sign

Step 9a: Agency Appointing Authority reviews and signs evaluation

1) Review the **Final Rating section** at the top

2) Review task and check-in details for each development plan item by clicking **show details** beside each section

3) Click the **Approve and Sign** button

4) In the pop-up window, click the **Approve** button to approve or the **Deny** button to send the plan back to the Immediate Supervisor for revision

- **Note:** If denying the plan, you must enter a comment

5) Click the **Submit** button

The screenshot displays the 'Employee Test : 2021 Development Plan' interface. At the top, it shows 'Employee Test | Human Resources Analyst 3G' and the dates 'Start: Nov 29, 2021 | End: Feb 27, 2022'. The main content area is divided into sections: 'Final Rating' (marked with a red circle 1), 'Collaboration' (marked with a red circle 2), and 'Check-In' (marked with a red circle 2). The 'Final Rating' section shows a 'SUPERVISOR TEST | TUE NOVEMBER 30, 2021 1:03 PM' with a 'Does Not Meet Expectations' status. The 'Collaboration' section is marked 'Needs Development' and includes a description: 'Works cooperatively with others to... respect and fairness. Shares time, energy...'. The 'Check-In' section shows '0 of 1 tasks completed'. A red arrow points from the 'Approve and Sign' button (marked with a red circle 3) to the 'Approve & Sign' pop-up window. In this window, the 'Approve' button is marked with a red circle 4, and the 'Submit' button is marked with a red circle 5. The pop-up window also includes a text area for comments, a signature line for the 'Appointing Authority', and options for 'Auto-generate' and 'Draw signature'.

Additional System Resources



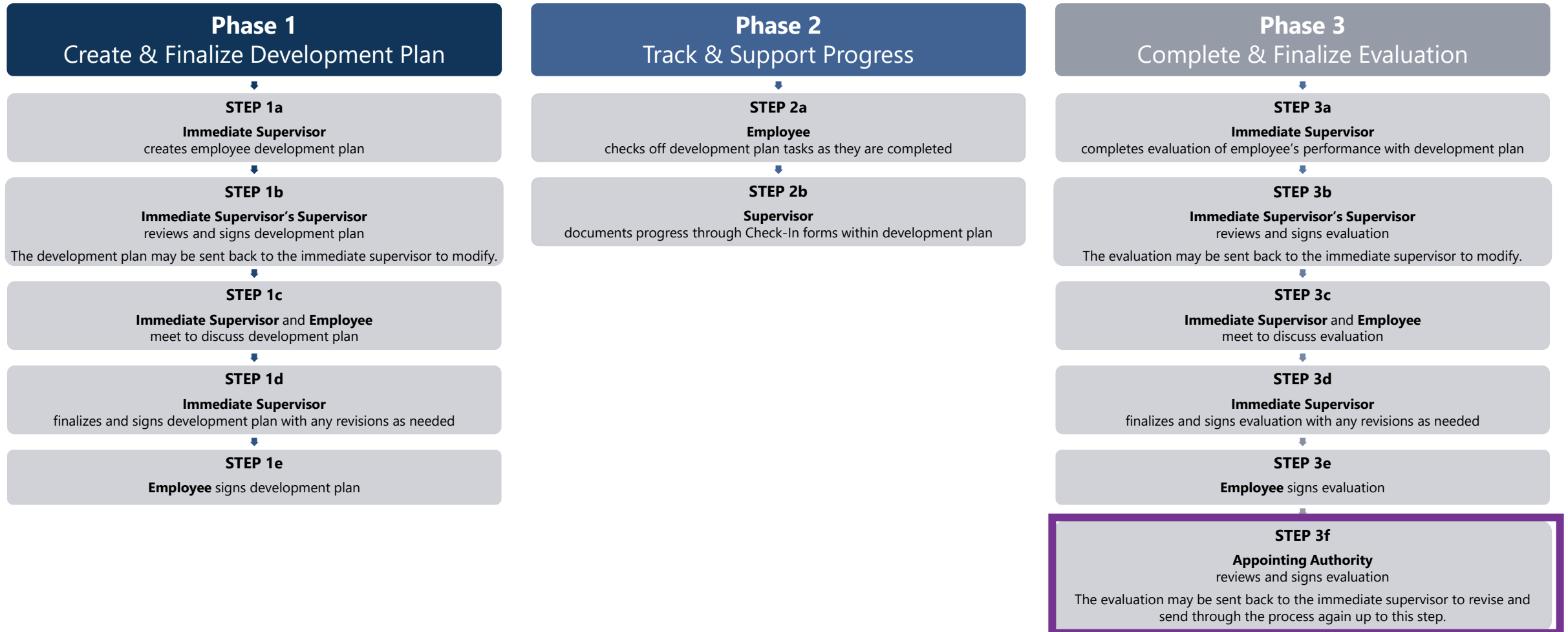
Development Plans





Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Development Plans

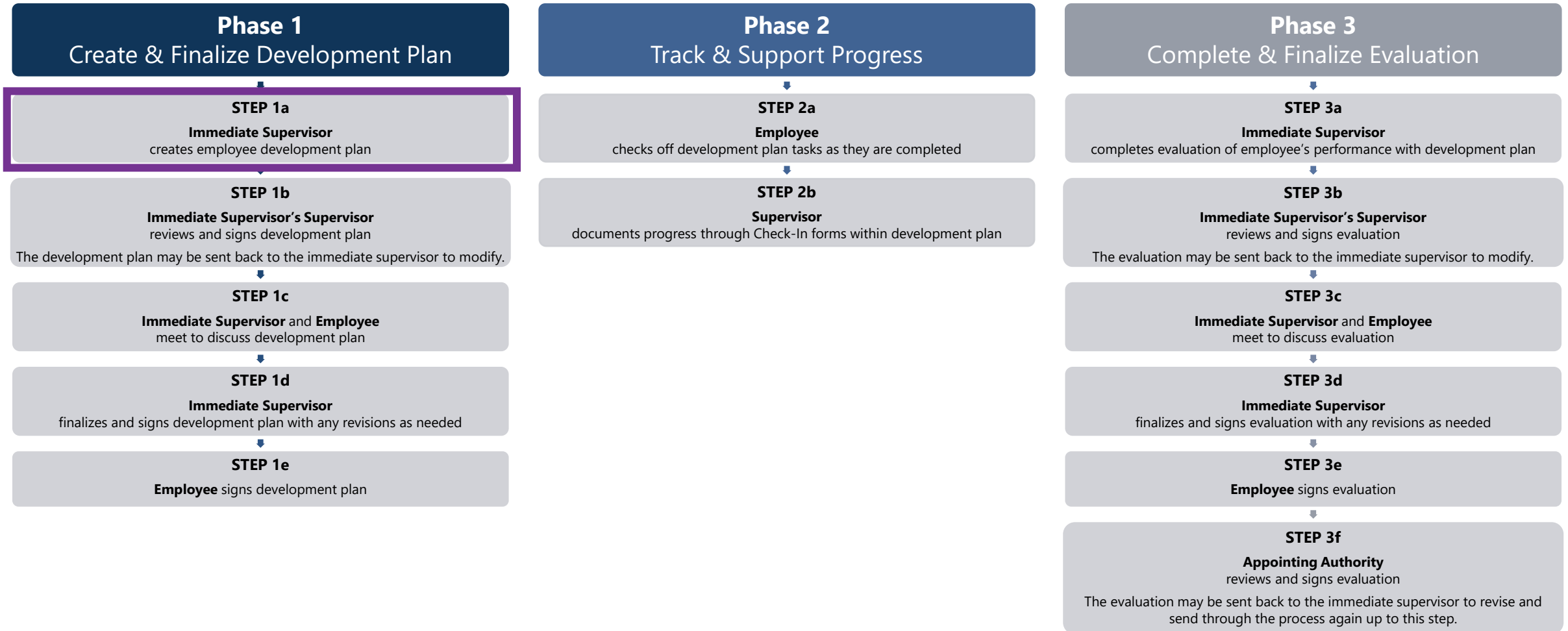
Phase 1: Create & Finalize Development Plan

Step-by-step instructions and videos



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 1: Create & Finalize Development Plan

Step 1a: Immediate Supervisor creates employee development plan

1) Find and click the task for creating the development plan
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Review the development plan

3) Click the *Add New Focus Item* button

4) Click *From Evaluation* from the dropdown menu



Phase 1: Create & Finalize Development Plan

Step 1a: Immediate Supervisor creates employee development plan

5) In the pop up window, **click the checkbox** beside each employee goal you want to add to the development plan

6) **Click *Competencies*** above the tab

7) **Click the checkbox** beside each competency you want to add to the development plan

8) **Click the *Save* button**

The screenshot shows a 'From Evaluation' pop-up window with two tabs: 'Goals' and 'Competencies'. The 'Goals' tab is active, showing a table of 'Employee Goals from Evaluation'. A red box highlights the 'Competencies' tab, and a red arrow points to it from a red circle labeled '6'. Another red box highlights the checkboxes in the 'Goals' table, with a red circle labeled '5' next to it. A red box highlights the 'Save' button in the top right corner, with a red circle labeled '8' next to it. The 'Competencies' tab is also visible, showing a table of 'Competencies from Evaluation'. A red box highlights the checkboxes in this table, with a red circle labeled '7' next to it. The 'Save' button in the 'Competencies' tab is also highlighted with a red box and a red circle labeled '8'.

Goal Name	Related to	Progress	Score	Rater
<input type="checkbox"/> Respond to Customer Support Requests	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	0%	4 Exceeds Expectations	Supervisor Test 100%
<input type="checkbox"/> Deliver Community Education Events				
<input type="checkbox"/> Launch New Online System				
<input checked="" type="checkbox"/> Respond to Customer Support Requests				
<input checked="" type="checkbox"/> Deliver Community Education Events				
<input checked="" type="checkbox"/> Launch New Online System				

Competency Name	Related to	Score	Rater
<input type="checkbox"/> Collaboration	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	4 Exceeds Expectations	Supervisor Test 100%
<input type="checkbox"/> Accountability	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	3 Meets Expectations	Supervisor Test 100%
<input type="checkbox"/> Integrity	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	3 Meets Expectations	Supervisor Test 100%
<input type="checkbox"/> Communication	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	4 Exceeds Expectations	Supervisor Test 100%
<input type="checkbox"/> Decision Making	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	3 Meets Expectations	Supervisor Test 100%
<input type="checkbox"/> Adaptability	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	4 Exceeds Expectations	Supervisor Test 100%
<input type="checkbox"/> Leadership & Coaching	Employee Test FY 2021 Performance Plan - Semiannual Evalu...	4 Exceeds Expectations	Supervisor Test 100%
<input checked="" type="checkbox"/> Collaboration	Employee Test FY 2022 Performance Plan - Semiannual Eval...	2 Needs Development	Supervisor Test 100%
<input checked="" type="checkbox"/> Accountability	Employee Test FY 2022 Performance Plan - Semiannual Eval...	2 Needs Development	Supervisor Test 100%
<input checked="" type="checkbox"/> Integrity	Employee Test FY 2022 Performance Plan - Semiannual Eval...	2 Needs Development	Supervisor Test 100%

Phase 1: Create & Finalize Development Plan

Step 1a: *Immediate Supervisor* creates employee development plan

9) On the development plan page, you can **reorder** the items by clicking the three dots on the left side of an item and dragging it up or down

10) To review an item's details, **click the *Details* icon** on the right side of the item

Employee Test : 2021 Development Plan

Employee Test | Human Resources Analyst 3G

Start: Nov 29, 2021 | End: Feb 27, 2022

Focus Items | Process

Plan Status: Draft

+ Add New Focus Item

View Summary Page

9 **10**

Collaboration

Category: All Employees

Works cooperatively with others to share information and work towards goals. Encourages diverse and differing perspectives to create better outcomes. Treats all people with dignity, respect and fairness. Shares time, energy and knowledge with others to ensure they can succeed.

View Check-Ins | View Tasks

no check-in | No tasks

Accountability

Category: All Employees

Takes personal ownership and responsibility for the quality and timeliness of work outcomes. Uses time efficiently and responds quickly and constructively when confronted with challenges. Demonstrates openness to feedback and suggestions for improvement.

View Check-Ins | View Tasks

no check-in | No tasks

Phase 1: Create & Finalize Development Plan

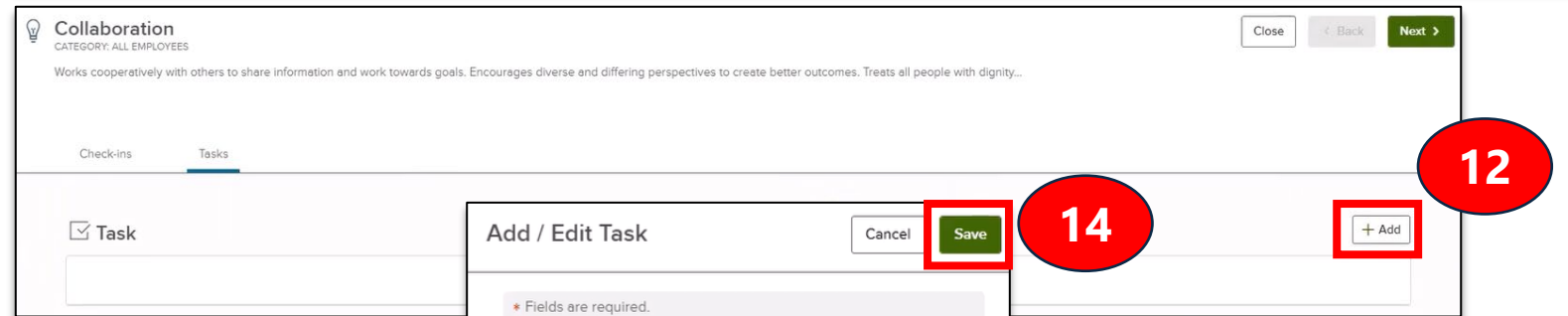
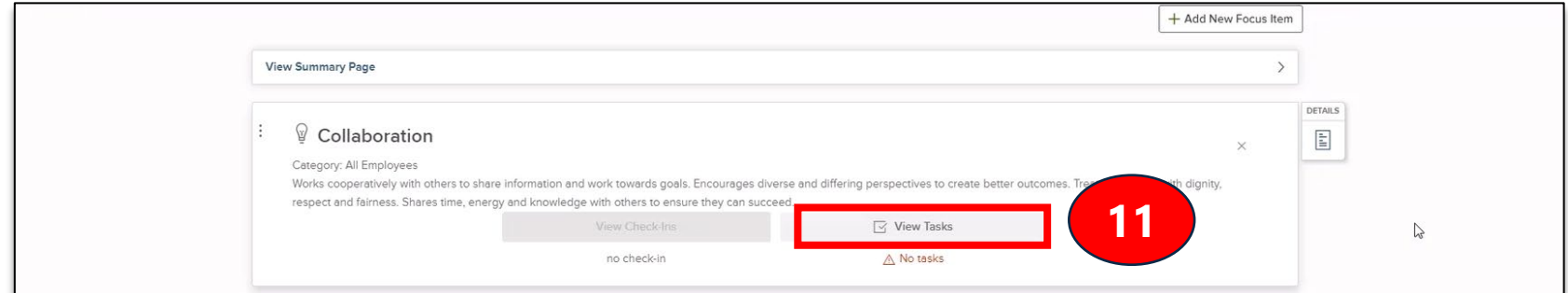
Step 1a: *Immediate Supervisor* creates employee development plan

11) Click the **View Tasks** button to add a task to an item

12) In the pop up window, click the **Add** button

13) In the pop up window, fill in the **Task Title**, **Task Description**, and **Due Date** fields

14) Click the **Save** button



A screenshot of the 'Add / Edit Task' form. The form has a title bar with 'Add / Edit Task' and buttons for 'Cancel' and 'Save' (highlighted with a red box). Below the title bar is a red asterisk and the text '* Fields are required.'. The form has three main sections: 'Task Title *' with a text input field containing 'Complete task on X Presentation last saved: Just now Division'; 'Task Description' with a text area containing 'Complete task and include input from partners in ABC Division by leading a brainstorming meeting and practicing active listening skills to capture different perspectives.'; and 'Due Date *' with a date input field containing '12/18/2021'. The entire form is highlighted with a red border.

Phase 1: Create & Finalize Development Plan

Step 1a: *Immediate Supervisor* creates employee development plan

15) To edit a task, click the pencil icon on the right side of the task

16) To delete a task, click the trash can icon on the right side of the task

17) To move to the next development plan item, click the *Next button*

18) To return to the development plan, click the *Close button*

The screenshot shows a web interface for a task management system. At the top, there is a header for 'Collaboration' with a category of 'ALL EMPLOYEES' and a description: 'Works cooperatively with others to share information and work towards goals. Encourages diverse and differing perspectives to create better outcomes. Treats all people with dignity...'. Below the header, there are two tabs: 'Check-ins' and 'Tasks'. The 'Tasks' tab is active. A task is listed with a checkbox, a title 'Complete task on X project in partnership with ABC Division', a description 'Complete task and include input from partners in ABC Division by leading a brainstorming meeting and practicing active listening skills to capture different perspectives.', and a due date 'Due in 19 Days'. To the right of the task, there are two icons: a pencil icon (labeled 15) and a trash can icon (labeled 16). Above the task list, there are three buttons: 'Close' (labeled 18), '< Back' (labeled 17), and 'Next >' (labeled 17).

Phase 1: Create & Finalize Development Plan

Step 1a: Immediate Supervisor creates employee development plan

19) To view a summary of the development plan, click *View Summary Page* above the development plan items

20) Click the **Start Plan** button to activate and send the development plan to the Immediate Supervisor's Supervisor for review

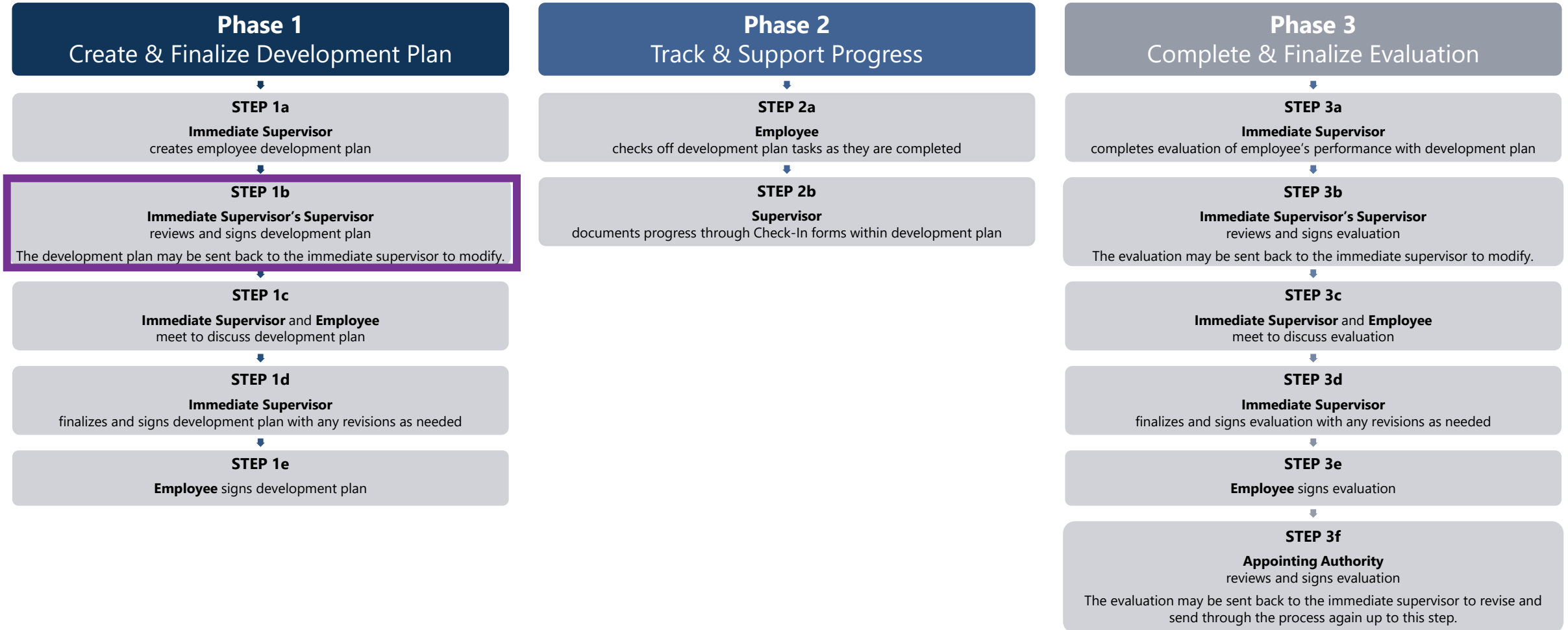
21) Click the **Continue** button in the pop up window

The screenshot displays the 'Employee Test : 2021 Development Plan' interface. At the top right, a 'Start Plan' button is highlighted with a red box and a red circle containing the number 20. Below this, a 'View Summary Page' button is highlighted with a red box and a red circle containing the number 19. A 'Development Plan' pop-up window is overlaid on the main interface, containing the text: 'You are about to start this development plan. After the plan has started, its contents can become visible to the target employee. Do you wish to continue?'. The 'Continue' button in this pop-up is highlighted with a red box and a red circle containing the number 21. A red arrow points from the 'Start Plan' button to the 'Continue' button.



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 1: Create & Finalize Development Plan

Step 1b: Immediate Supervisor's Supervisor reviews and signs employee development plan

1) Find and click the task for signing the development plan
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the **Approve & Sign** button

3) In the pop-up window, click the **Approve** button to approve or the **Deny** button to send the plan back to the Immediate Supervisor for revision

- **Note:** If denying the plan, you must enter a comment

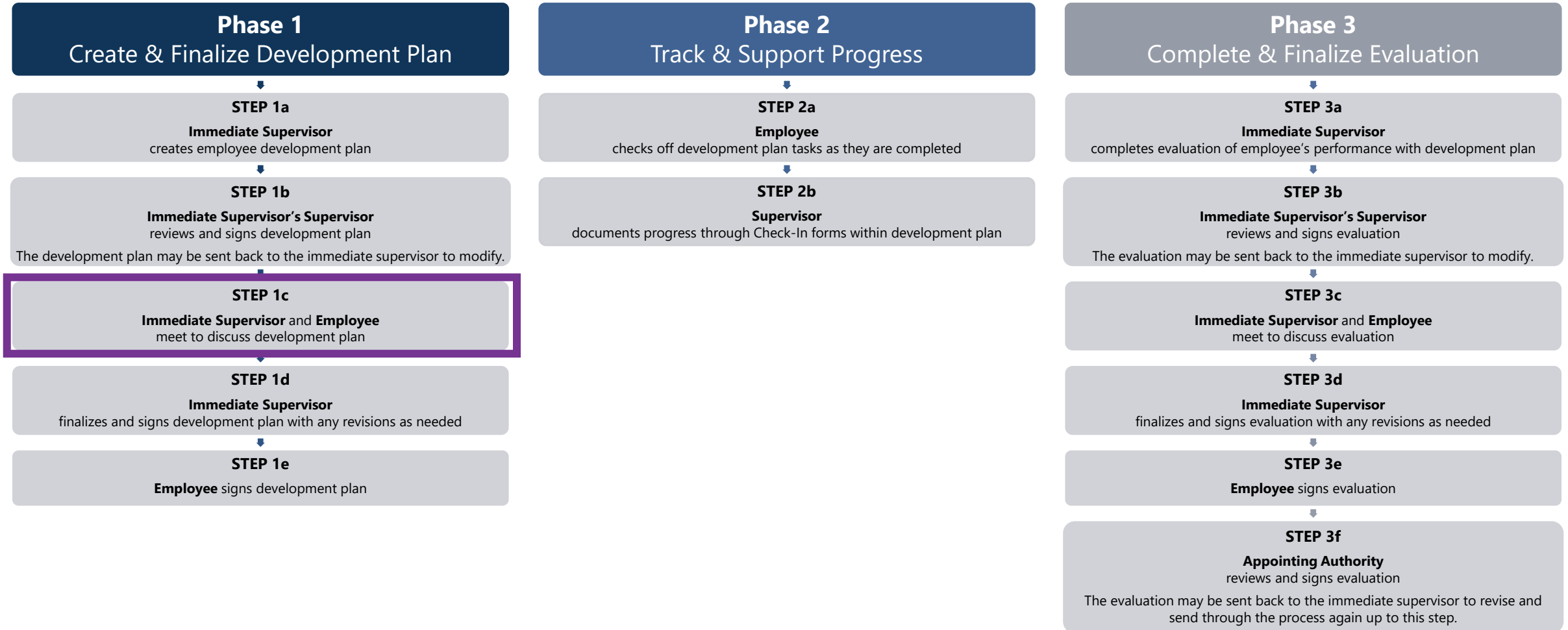
4) Click the **Submit** button

The screenshot illustrates the approval process in the NEOGOV system. At the top, a task card labeled '1' shows an 'APPROVAL' task due on 12/20/21. The task title is 'Approve Development Plan' for 'Employee Test • Employee Test : 2021 Development Plan'. A red box labeled '2' highlights the 'Approve & Sign' button on the task card. Below this, a pop-up window titled 'Approve & Sign' is shown. In this window, the 'Approve' button is labeled '3' and the 'Deny' button is also highlighted with a red box. The 'Submit' button at the top right of the pop-up is labeled '4'. The pop-up window includes a rich text editor with a toolbar and a signature line. The signature line shows a handwritten signature 'Supervisor's Supervisor Test' and the text 'Supervisor's Supervisor Test' and 'November 29, 2021'. At the bottom of the pop-up, there are options for 'Auto-generate' and 'Draw signature'.



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 1: Create & Finalize Development Plan

Step 1c: *Immediate Supervisor* discusses development plan with employee

After meeting with the employee to discuss their development plan:

1) Find and click the task for discussing the development plan with the employee

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) In the pop-up sidebar, click the circle beside *Mark task as complete*

3) Add any comments as needed

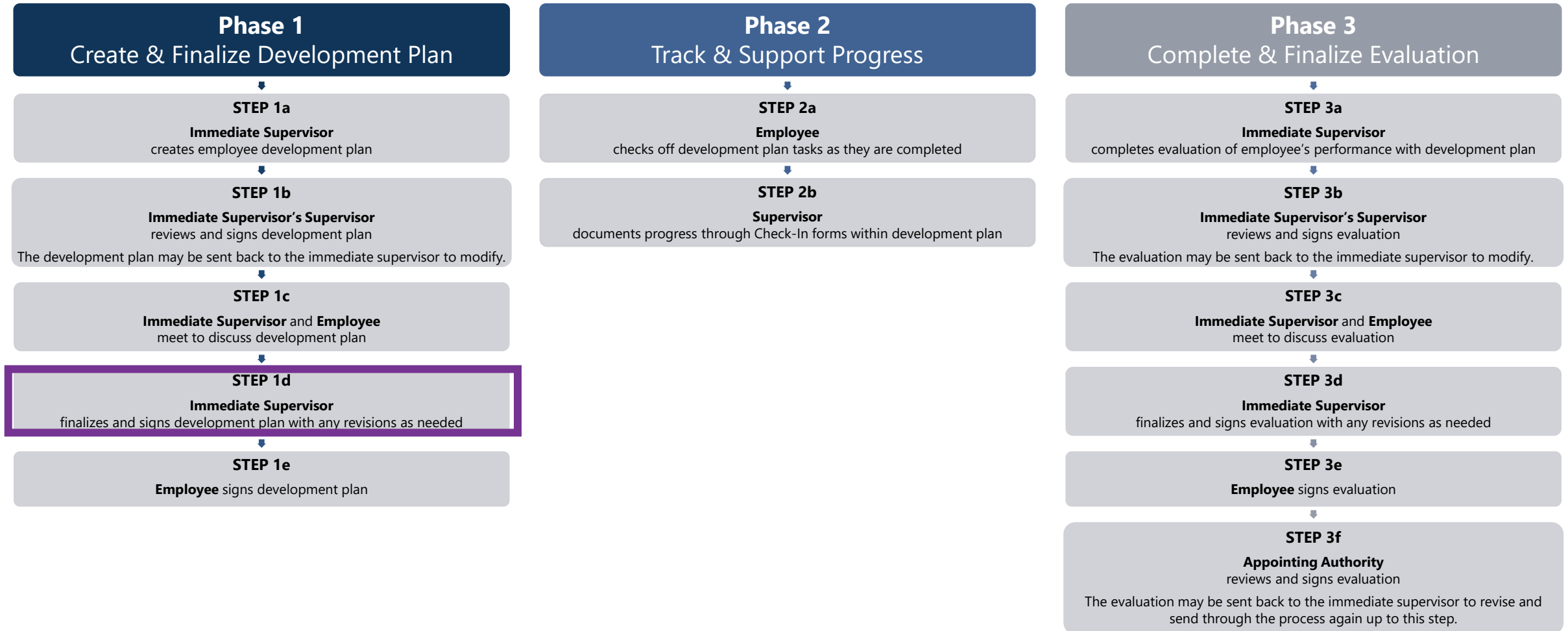
4) Click the *Save* button

The screenshot shows the NEOGOV Task Detail interface. A sidebar on the left contains a task card with a red circle '1' next to it. The task card has a 'GENERAL' tab, a profile picture, and the title 'Discuss Development Plan with Employee' with a subtitle 'For Employee Test • Employee Test : 2021 Development Plan'. A red circle '2' is next to the 'Mark task as complete' radio button in the main sidebar. A red circle '3' is next to the 'Comment' section, which includes a rich text editor with a toolbar and a text area containing 'Type something'. A red circle '4' is next to the 'Save' button in the top right corner of the sidebar. The sidebar also has a 'Cancel' button next to the 'Save' button.



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 1: Create & Finalize Development Plan

Step 1d: Immediate Supervisor finalizes and signs development plan

1) Find and click the task for signing the development plan
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the **Approve & Sign** button

3) In the pop-up window, click the **Approve** button to approve or the **Deny** button to send the plan back to beginning of the process and modify

- **Note:** If denying the plan, you must enter a comment

4) Click the **Submit** button

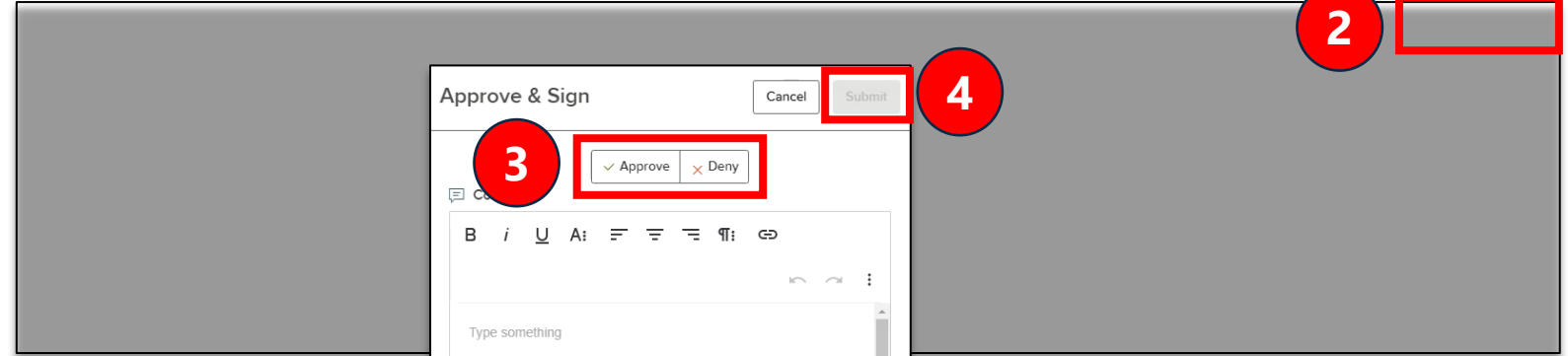
1



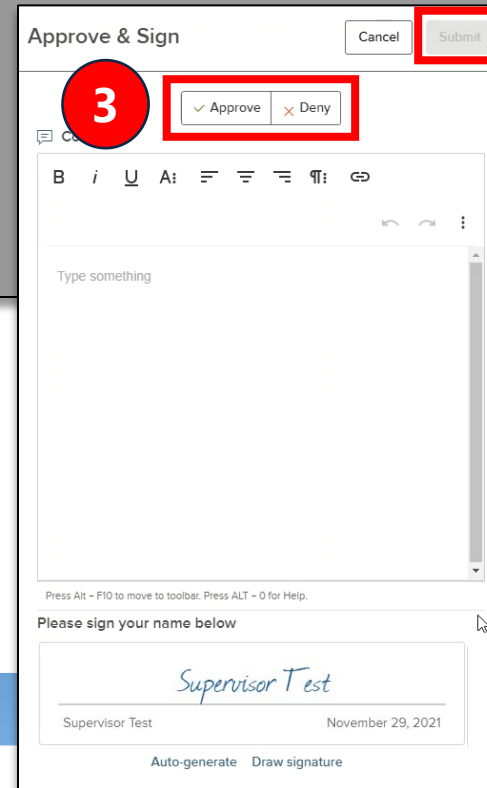
APPROVAL Due 12/27/21

Supervisor Signature
For Employee Test • Employee Test : 2021 Development Plan

2



4



Approve & Sign Cancel Submit

Approve Deny

Type something

Please sign your name below

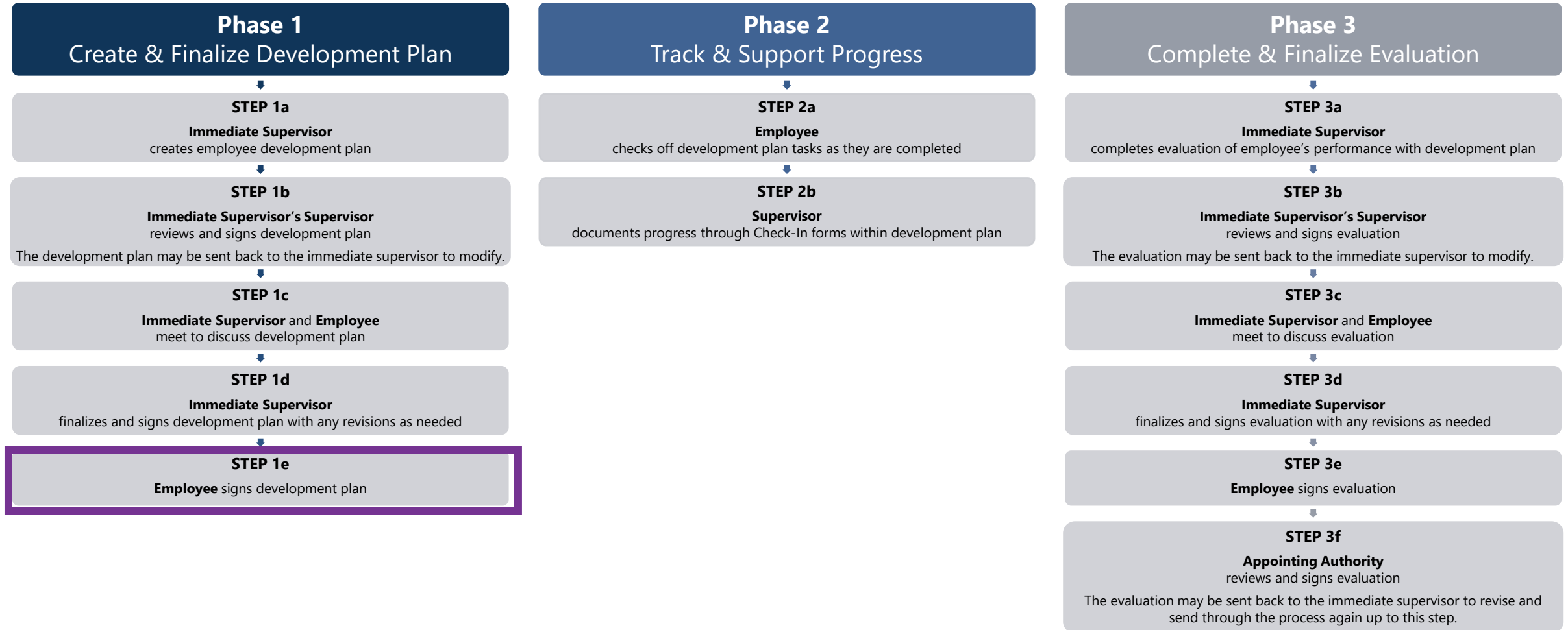
Supervisor Test
November 29, 2021

Auto-generate Draw signature



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 1: Create & Finalize Development Plan

Step 1e: Employee signs development plan

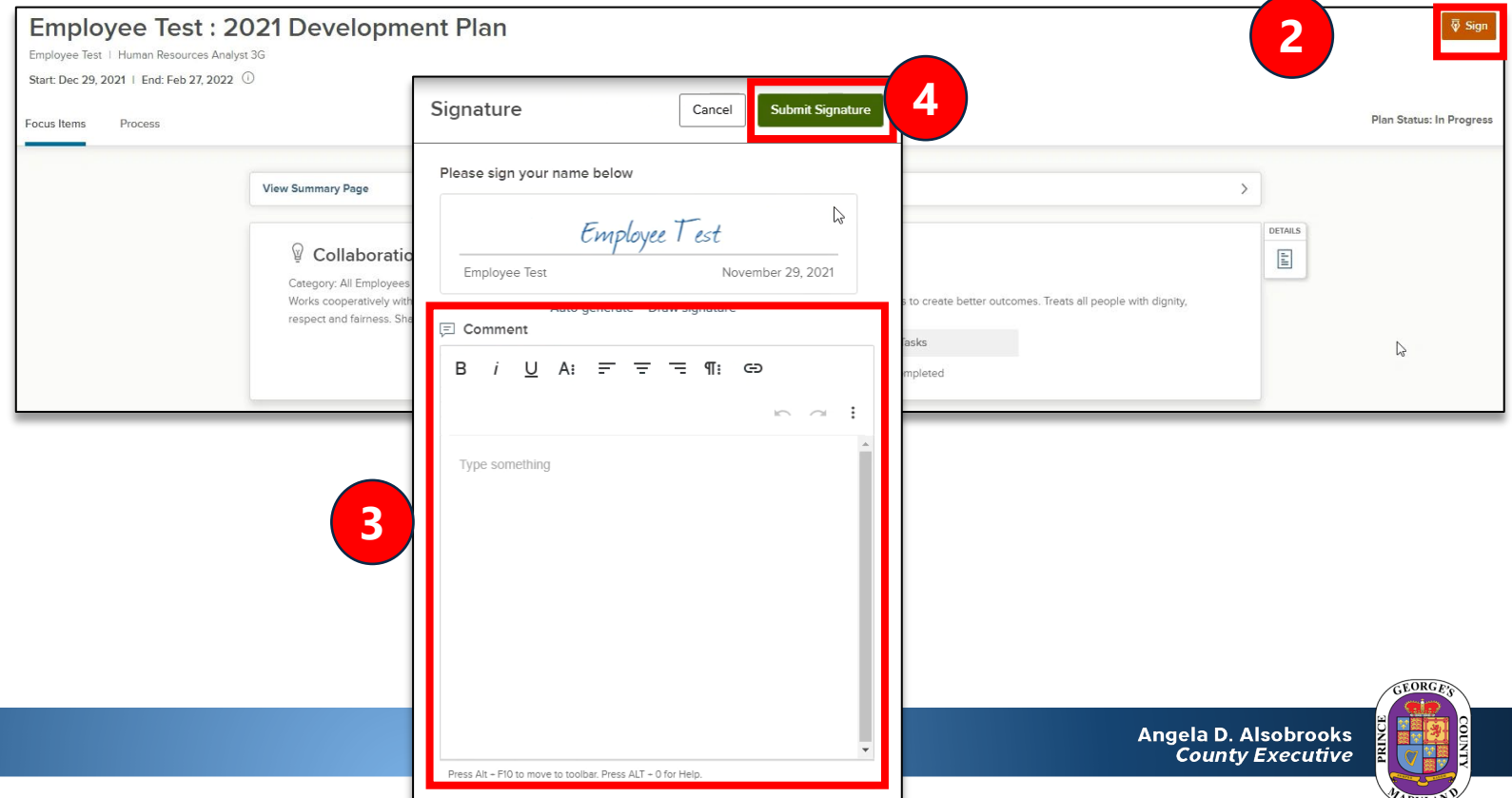
1) Find and click the task for signing the development plan

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Sign* button

3) In the pop-up window, enter any **comments as needed**

4) Click the *Submit Signature* button



Performance Planning

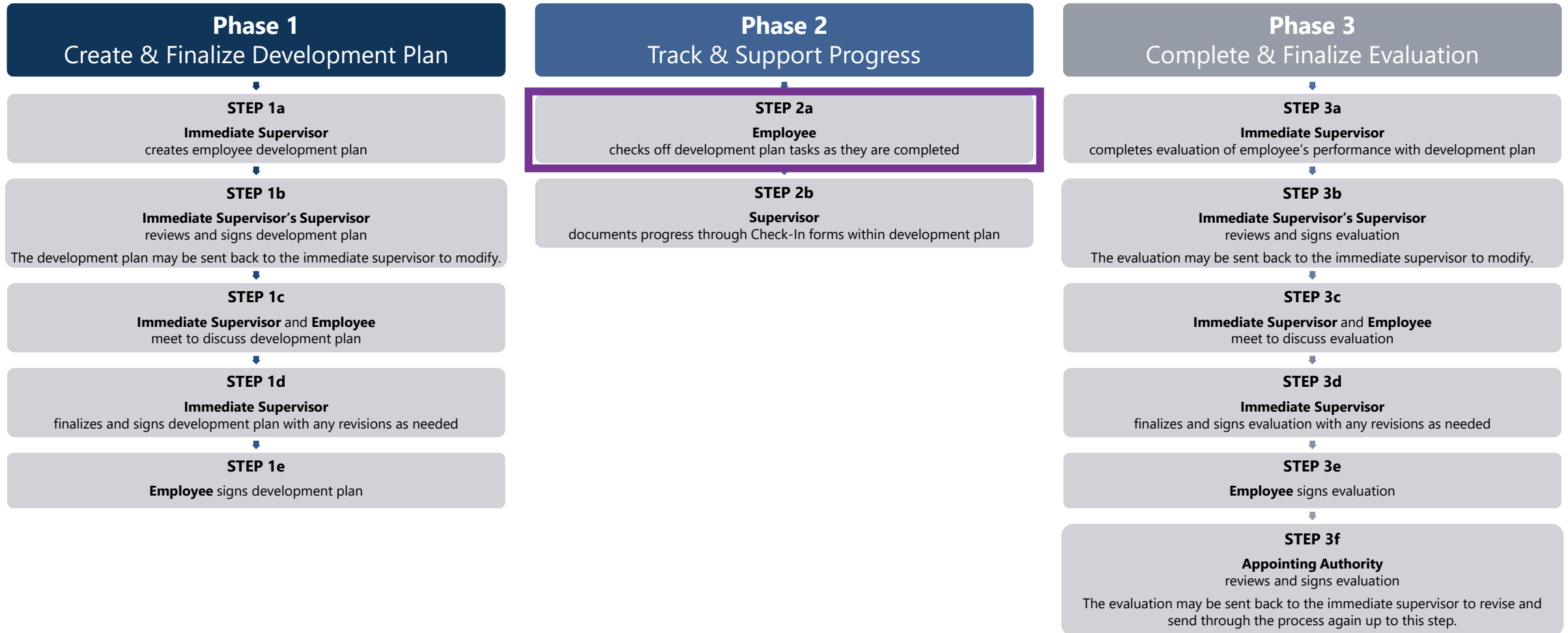
Phase 2: Track & Support Progress

Step-by-step instructions and videos



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 2: Track & Support Progress

Step 2a: *Employee* checks off development plan tasks when completed

1) Find and click the task for the specific development plan task you have completed

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) In the pop-up sidebar, click the circle beside the task

3) Add any comments as needed

4) Click the Save button

The screenshot illustrates the process of marking a task as complete in the NEOGOV system. It is divided into four numbered steps:

- 1**: A task card titled "Complete Weekly Work Update" is shown in a sidebar. The card includes a profile picture, the task name, and the context "For you • Employee Test : 2021 Development Plan". A red circle with the number "1" is placed over the task card.
- 2**: The task details view is shown. A green checkmark icon in the top left corner of the task details area is highlighted with a red circle with the number "2".
- 3**: A text input field for adding comments is highlighted with a red circle with the number "3". The field contains the placeholder text "Type something".
- 4**: The "Save" button at the bottom of the task details view is highlighted with a red circle with the number "4".



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 2: Track & Support Progress

Step 2b: Immediate Supervisor completes Check-In forms to document progress

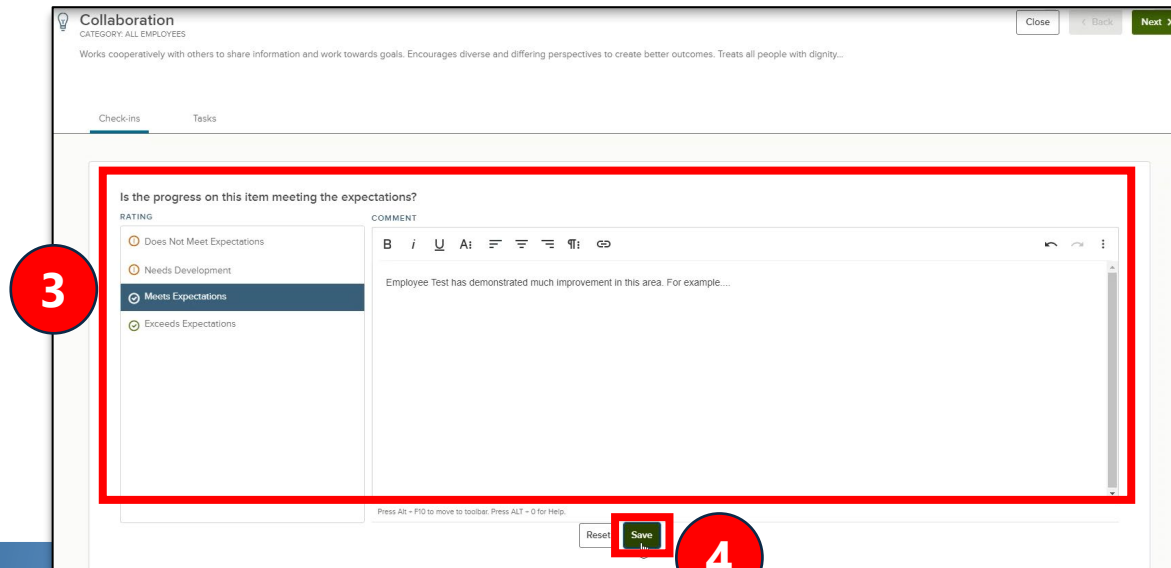
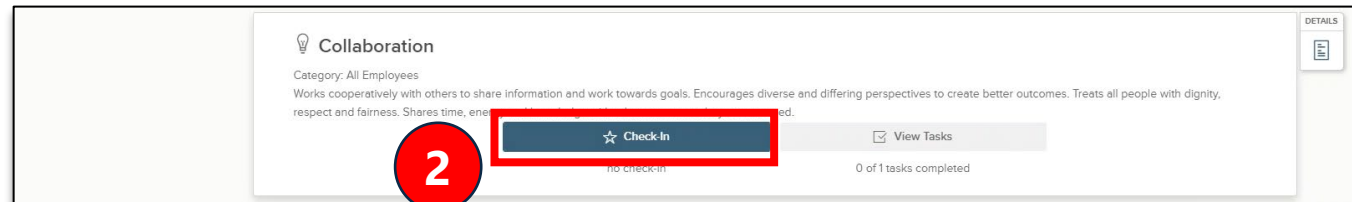
1) Find and click the task for completing a development plan check-in form

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Check In* button for the specific development plan item

3) In the pop up window, select a rating and add comments on the employee's progress with the development plan item

4) Click the *Save* button



Performance Planning

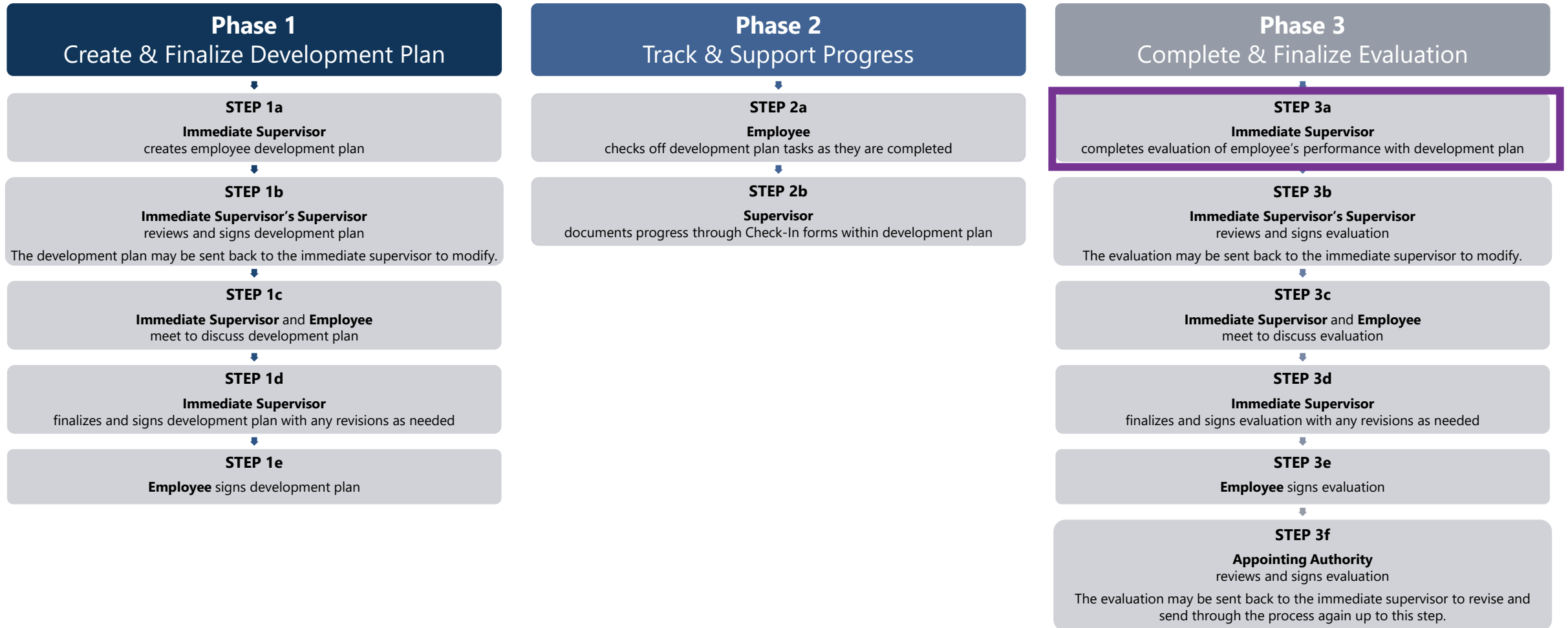
Phase 3: Complete & Finalize Evaluation

Step-by-step instructions and videos



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 3: Complete & Finalize Evaluation

Step 3a: *Immediate Supervisor* completes evaluation of employee's development plan performance

1) Find and click the task for completing the evaluation

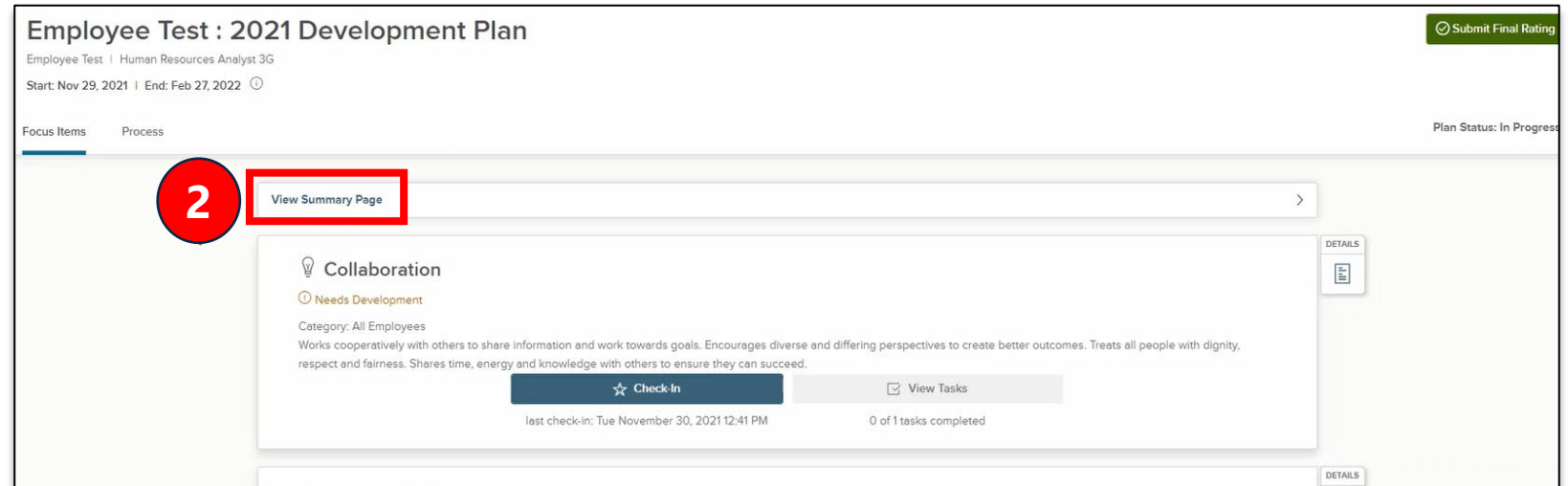
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

1



2) Click *View Summary Page* above the development plan items

2



Phase 3: Complete & Finalize Evaluation

Step 3a: Immediate Supervisor completes evaluation of employee's development plan performance

3) Review task and check-in details for each development plan item by clicking *show details* beside each section

4) Click the *Submit Final Rating* button

The screenshot displays the '2021 Development Plan' interface. At the top right, there is a red box with a white '4' and a green 'Submit Final Rating' button. Below this, the 'Plan Status: In Progress' is shown. The main content area includes a 'Collaboration' section with a 'Needs Development' status, a 'Check-In' section with three entries, and a 'Tasks' section with one task. A red box with a white '3' is positioned to the right of the 'Check-In' section. A 'show details' button is highlighted with a red box, and two red arrows point from it to 'hide details' buttons on the right side of the 'Check-In' entries. The 'Tasks' section also has a 'hide details' button highlighted with a red box. The interface includes navigation options like 'Back to Card View' and 'Print'.

Phase 3: Complete & Finalize Evaluation

Step 3a: Immediate Supervisor completes evaluation of employee's development plan performance

5) In the pop up window, **select a rating and add comments** on the employee's progress with the development plan item

6) **Click the Save button**

7) In the pop up window, **click the Submit Final Rating button**

Final Rating

Cancel Save

How do you evaluate the overall progress made on the development plan?

RATING COMMENT

Does Not Meet Expectations
 Needs Development
 Meets Expectations
 Exceeds Expectations

B / i / U / A: [Rich Text Editor]

Employee Test made efforts to complete this development plan's tasks, particularly with the Collaboration competency. However, throughout the process they have shown declining quality and timeliness in their work. For example...

Press Alt - F

You're almost done!

By clicking certify and submit, you confirm that your rating is complete and accurate. Once your rating is submitted, you will no longer be able to make changes.

Supervisor Test

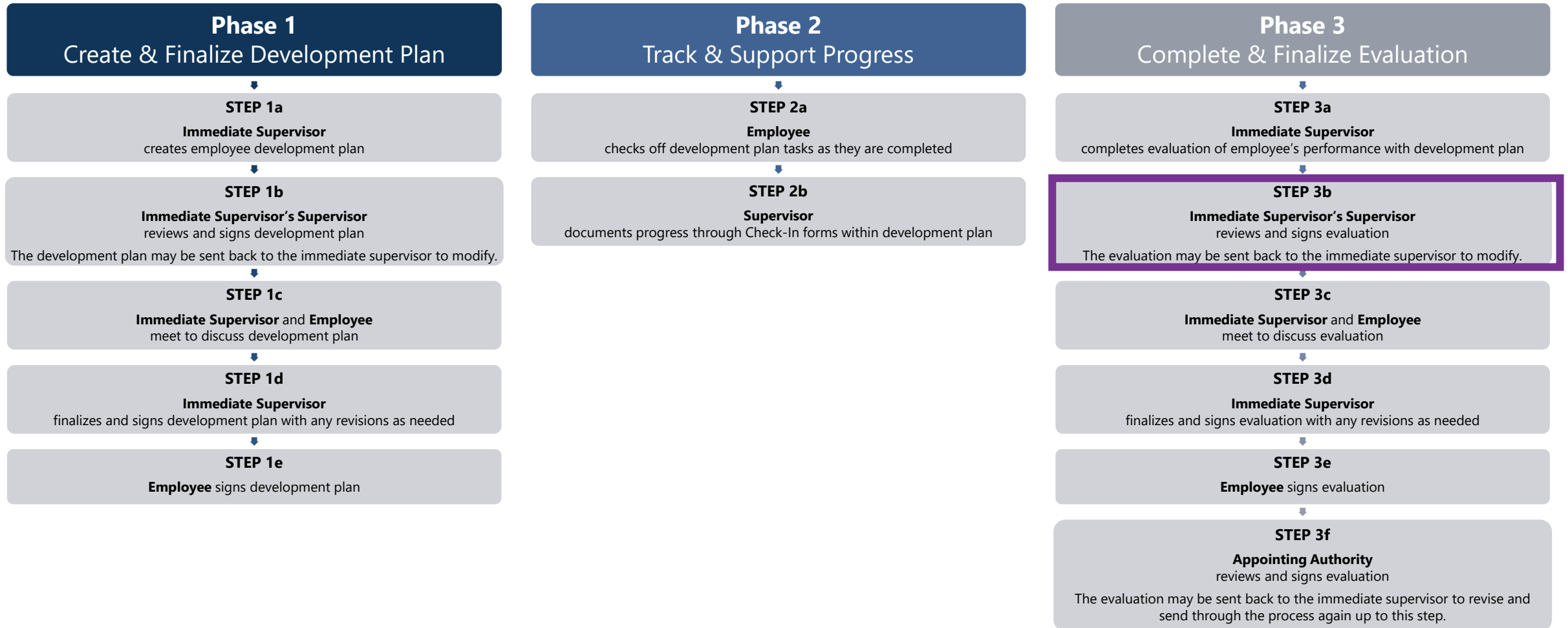
Do you wish to continue?

Cancel



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



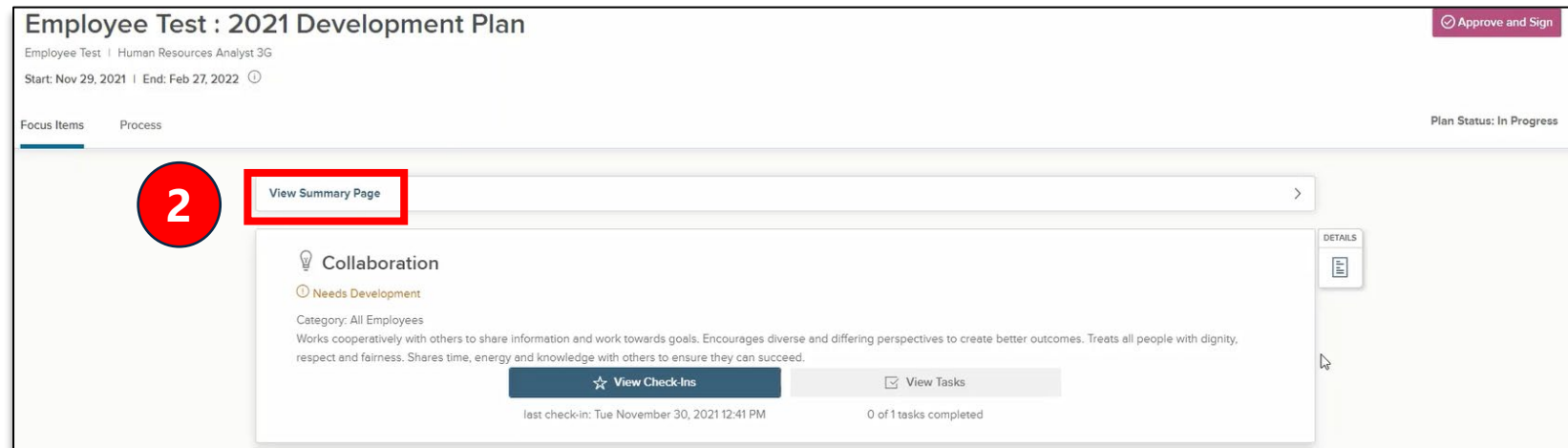
Phase 3: Complete & Finalize Evaluation

Step 3b: Immediate Supervisor's Supervisor reviews and signs evaluation

1) Find and click the task
for signing the evaluation
(For instructions on accessing employee
performance management tasks in
NEOGO, [click here](#))



**2) Click *View Summary*
*Page*** above the
development plan items



Phase 3: Complete & Finalize Evaluation

Step 3b: Immediate Supervisor's Supervisor reviews and signs evaluation

3) Review the **Final Rating section** at the top

4) Review **task and check-in details** for each development plan item by clicking *show details* beside each section

5) Click the **Approve and Sign** button

6) In the pop-up window, **click the Approve button to approve or the Deny button to send the plan back** to the Immediate Supervisor for revision

- **Note:** If denying the plan, you must enter a comment

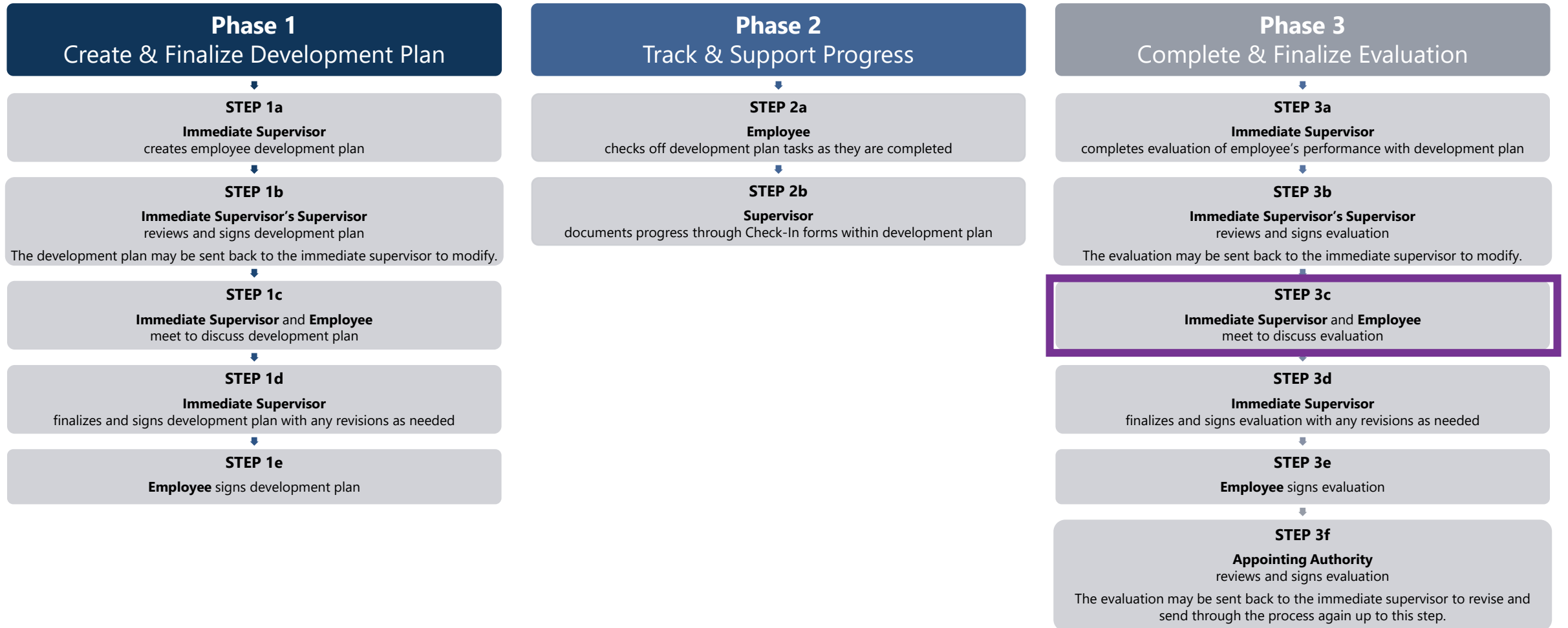
7) Click the **Submit** button

The screenshot displays the 'Employee Test : 2021 Development Plan' interface. At the top right, there is an 'Approve and Sign' button (5). Below it, a 'Final Rating' section (3) is highlighted, showing a 'Does Not Meet Expectations' status. To the right of the main content area, there are 'show details' buttons (4). A pop-up window titled 'Approve & Sign' (6) is open, showing 'Approve' and 'Deny' buttons. The 'Submit' button (7) is also visible in the pop-up. The pop-up window contains a signature field with the text 'Supervisor's Supervisor Test' and the date 'November 29, 2021'. A red arrow points from the 'Approve and Sign' button (5) to the 'Approve' button (6) in the pop-up window.



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 3: Complete & Finalize Evaluation

Step 3c: *Immediate Supervisor* discusses evaluation with employee

After meeting with the employee to discuss the evaluation:

1) Find and click the task for discussing the final rating evaluation with the employee

(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) In the pop-up sidebar, click the circle beside *Mark task as complete*

3) Add any comments as needed

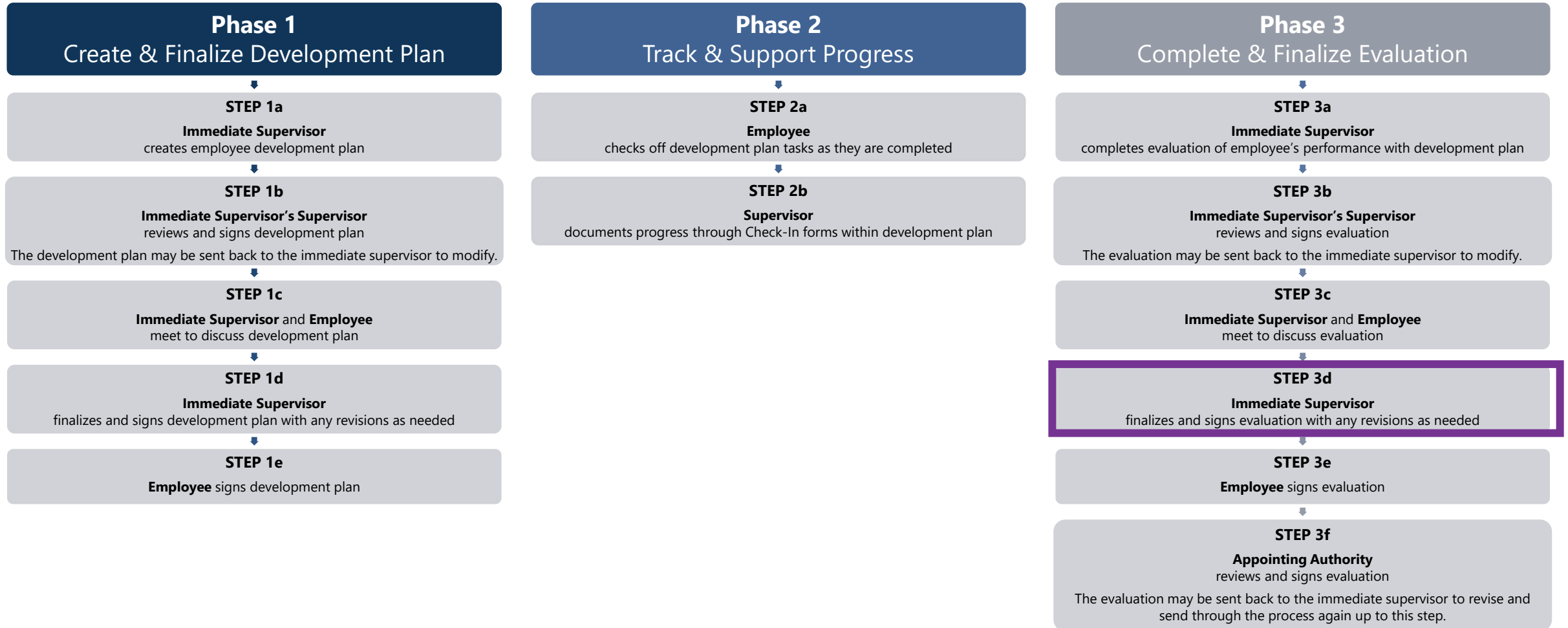
4) Click the *Save* button

The screenshot displays the 'Task Detail' interface in NEOGOV. A task card is shown with a red circle '1' next to it. The task card has a 'GENERAL' tab and a title 'Discuss Final Rating with Employee' for 'Employee Test : 2021 Development Plan'. A red circle '2' is next to the 'Mark task as complete' option in the sidebar. A red circle '3' is next to the comment box in the sidebar. A red circle '4' is next to the 'Save' button in the top right corner of the task detail panel.



Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Phase 3: Complete & Finalize Evaluation

Step 3d: Immediate Supervisor finalizes and signs evaluation

1) Find and click the task for approving and signing the final rating for development plan evaluation

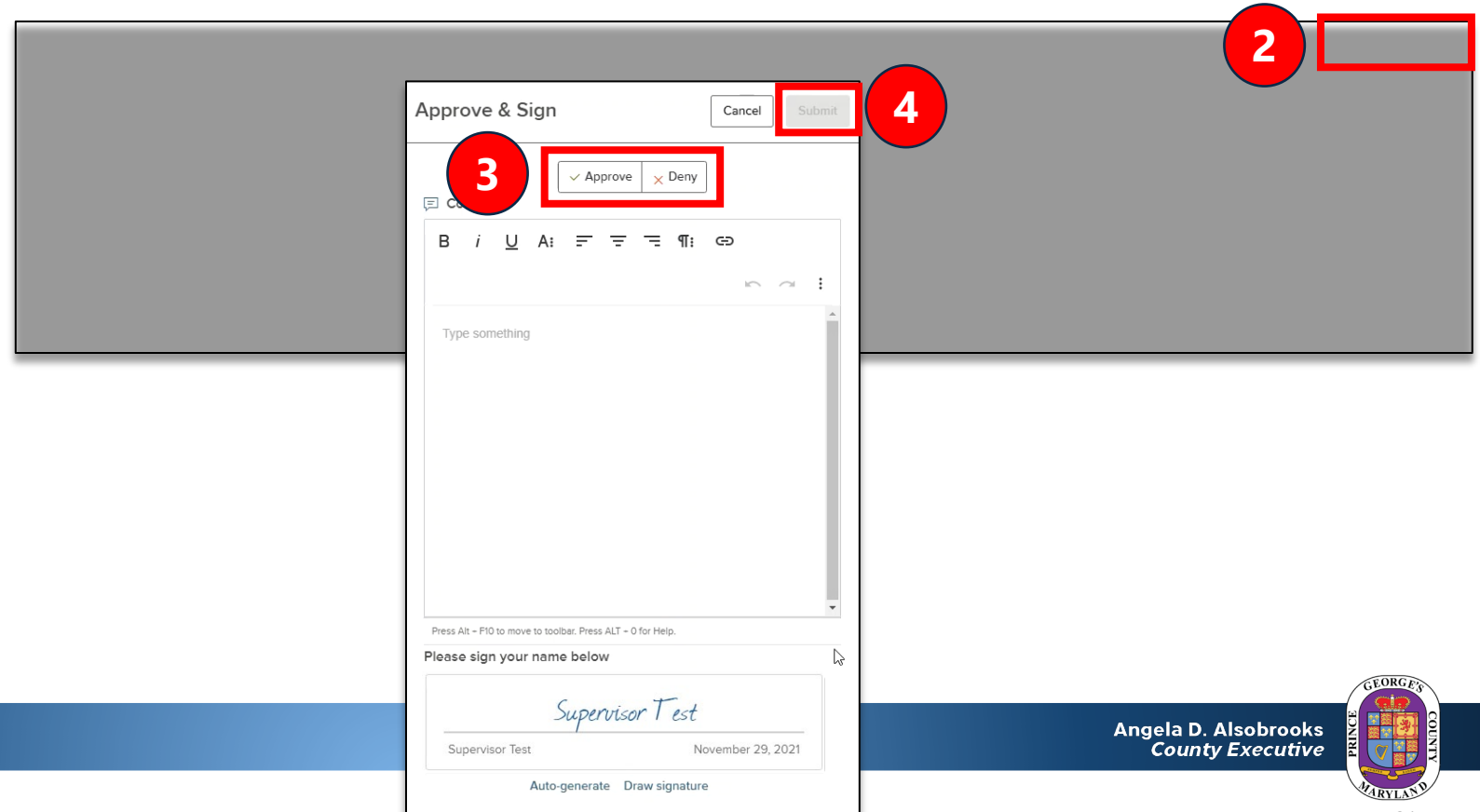
(For instructions on accessing employee performance management tasks in NEOGOV, [click here](#))

2) Click the *Approve & Sign* button

3) In the pop-up window, click the *Approve* button to approve or the *Deny* button to send the plan back to beginning of the process and modify

- **Note:** If denying the plan, you must enter a comment

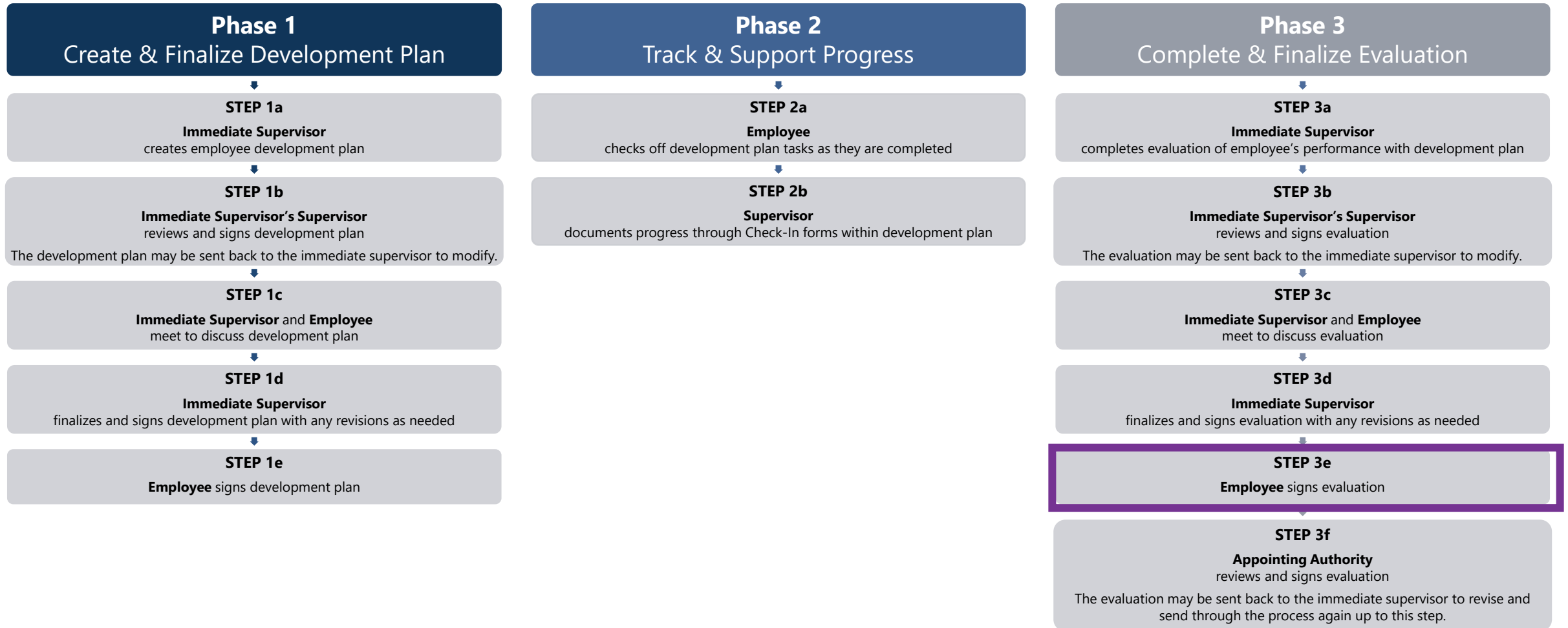
4) Click the *Submit* button





Development Plans | Process

All development plan steps take place in the online system, except for the meetings between the employee and immediate supervisor to discuss the development plan and evaluation.



Section 3: Performance Support





Phase 2: Performance Support | Online Tools

NEOGOV Perform offers the following **optional** tools to document performance and pre-write the evaluation throughout the year.



Journal Entries

- Supervisors and employees can complete and share journal entries with each other throughout the year.
- Journal entries can be pulled into both the employee optional self-evaluation and the supervisor's evaluation forms at the end of the year.



Quarterly Check-In Forms

- Supervisors can complete quarterly check-in forms as they meet with employees.
- Supervisors can add text from journal entries to check-in form responses
- Employees can view completed check-in forms.
- Check-In form responses can be pulled into the supervisor's performance evaluation form at the end of the year.

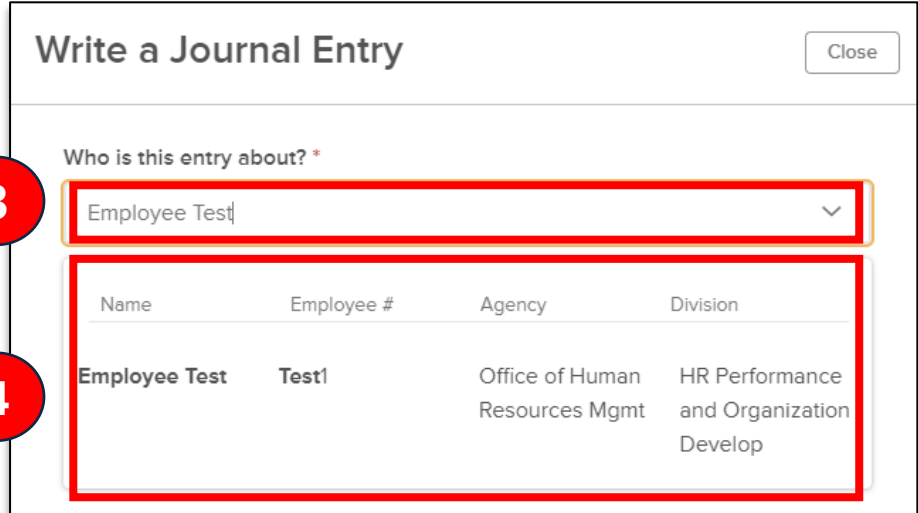
Write and Share Journal Entry in NEOGOV *(continued)*

3) In the pop-up window, **type in the name of the employee** you are writing a journal entry about

- **You can type in your own name** to write a journal entry about yourself

4) **Click to select the employee's name** from the dropdown list.

- For a journal entry about multiple employees, you can type in and select additional employee names, one at a time.



Write a Journal Entry Close

Who is this entry about? *

3 Employee Test

Name	Employee #	Agency	Division
Employee Test	Test1	Office of Human Resources Mgmt	HR Performance and Organization Develop

4

Write and Share Journal Entry in NEOGOV *(continued)*

5) Write the journal entry in the textbox. If needed, you can:

- attach one document (up to 5MB in size)
- type in the @ symbol and the name of a related competency or performance goal for the employee.

6) Select who you would like to share the journal entry with – the employee, their assigned manager(s), and/or their manager's manager

7) Click the **Submit Journal Entry** button to submit the journal entry.

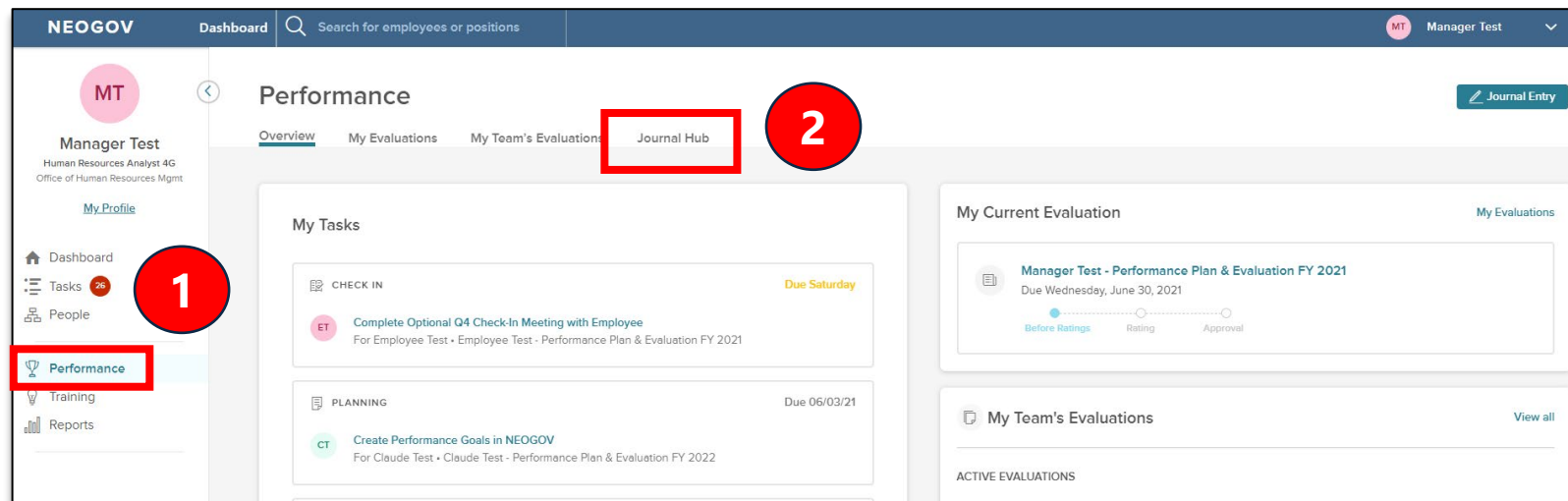
- To save a draft of the journal entry to work on later, click the *Keep as Draft* button

The screenshot shows the 'Write a Journal Entry' interface. At the top right is a 'Close' button. Below it is a dropdown menu labeled 'Who is this entry about? *' with 'ET: Employee Test' selected. A red line connects the first bullet point of step 5 to this dropdown. Below the dropdown are two buttons: 'Write a new journal entry' and 'View related entries'. A red arrow points from the second bullet point of step 5 to a document icon in the rich text editor toolbar. The main text area contains the entry: 'ET did a great job responding to a very difficult request from an important customer. They communicated with our team and the customer throughout the process while they worked to fix the issue. A great example of [Communication](#)!'. Below the text is a 'Draft Autosaved on 11/9/2021, 6:34:00 PM' message. A red circle with the number '5' is placed to the left of the text area. Below the text is a blue informational box with a question mark icon and text: 'Did you know? You can tag your journals with Competencies and Goals from recent/upcoming evaluations by typing "@\" along with the name of the item. Tagging is only applicable for one user at a time.' Below this is a 'Share With...' section with three options: 'Employee' (checked), 'Manager(s)' (checked), and 'Manager's Manager' (unchecked). A red box surrounds this section, with a red circle containing the number '6' to its left. At the bottom are three buttons: 'Discard Draft', 'Keep as Draft', and 'Submit Journal Entry'. A red box surrounds the 'Submit Journal Entry' button, with a red circle containing the number '7' to its right.

Review and Edit Journal Entries | Journal Hub Overview

1) From your NEOGOV Dashboard, **access the *Performance* section** in the left-hand menu

2) **Click to access the *Journal Hub* section**



Review and Edit Journal Entries | Journal Hub Overview

Supervisor Test
Human Resources Analyst 4G
Office of Human Resources Mgmt

My Profile

Dashboard

Tasks 21

People

Performance

Overview My Evaluations My Team's Evaluations Journal Hub

Journal Entry

Journal Hub for Employee Test

Current (3) Drafts (3)

Sort

Sort: Create Date • Newest First

ABOUT Employee Test Human Resources Anal...
I took the lead on helping a customer with a very challenging request for support. While working with the vendor and the customer, I kept everyone informed on the status, including when there were dela
...View More

ABOUT Employee Test Human Resources Anal...
Supervisor Test Created 11/15/21 • Edited 11/15/21
Employee Test presented an update on the XYZ project to the team on November 15th. They did a great job clearly communicating the status, successes, and challenges of the project. As a result of their presentation, the team was very excited about the progress we are making. This was a strong demonstration of Communication.
View Less

Shared

Shared

Any Journal Entries kept as drafts or not successfully posted can be found and completed in the **Drafts** tab

Any Journal Entries successfully posted can be found in the **Current** tab

Review and Edit Journal Entries | Journal Entry Overview

Below is an overview of parts of a journal entry:

Who the journal entry is **written about**

Who **wrote** the journal entry

A **blue people icon** means that this entry has been **shared** with others



ABOUT

Employee Test
Human Resources Anal...

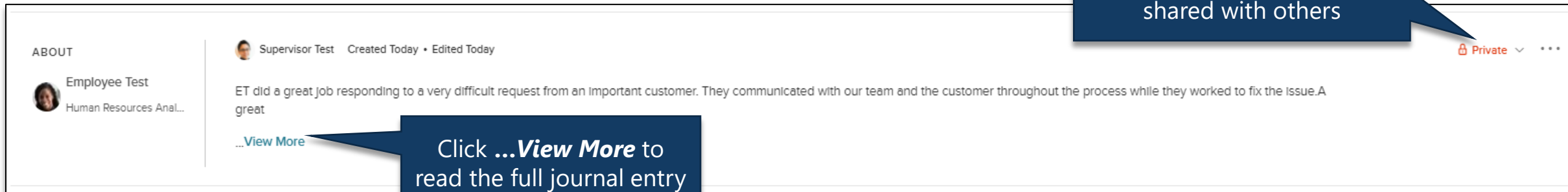
Supervisor Test Created 11/15/21 • Edited 11/15/21

Employee Test presented an update on the XYZ project to the team on November 15th. They did a great job clearly communicating the status, successes, and challenges of the project. As a result of their

[...View More](#)

Shared

A **red *Private* icon** means that this entry has **not** been shared with others



ABOUT

Employee Test
Human Resources Anal...

Supervisor Test Created Today • Edited Today

ET did a great job responding to a very difficult request from an important customer. They communicated with our team and the customer throughout the process while they worked to fix the issue. A great

[...View More](#)

Private

Click **...View More** to read the full journal entry

Review and Edit Journal Entries | Review Journal Entries

1) To review journal entries written about you, click the dropdown menu and select *Myself*

2) To review journal entries that (a) you have written about an employee or that (b) have been shared with you, search for and select the employee's name from the dropdown menu

The screenshot displays the 'Journal Hub' interface. At the top, there are tabs for 'Performance', 'My Evaluations', and 'Journal Hub'. Below this, a dropdown menu is set to 'Employee Test'. A red callout box labeled '1' highlights the 'Myself' dropdown menu, which is open to show options: 'Myself', 'Claude Test', 'Employee Test', and 'Supervisor Test'. A second red callout box labeled '2' highlights a search bar with the text 'Search'. Below the search bar, a 'Sort' dropdown is visible, and the text 'Sort: Create Date' is shown. The main content area lists three journal entries, each with an 'ABOUT' section, a profile picture, and a title. The first entry is 'Supervisor Test' with the text 'Great job, this is a test.' The second is 'Employee Test' with the text 'I took the lead on helping a customer with a very challenging request for support...' and a 'View More' link. The third is 'Supervisor Test' with the text 'Employee Test presented an update on the XYZ project to the team on November 15th...' and a 'View More' link. On the right side, there is a 'Journal Entry' button and a 'Shared' icon.

Review and Edit Journal Entries | Edit Journal Entries

1) To edit a journal entry you have written, click the three dots on the right side of the journal entry

Note: You can only edit journal entries you have written

2) Click **Edit** in the dropdown menu

3) Edit the journal entry as needed

4) To cancel editing the journal entry, click **Discard Draft**

- This action will **not** delete the original journal entry

5) To save a copy of the edited journal entry as a draft to work on later, click **Keep as Draft**

- This will save a copy of the edited journal entry in your Drafts tab
- The original journal entry will stay on the list of current journal entries

6) To submit the edited journal entry, click the **Submit Journal Entry** button

