



## Human Resources

### PERFORM Implementation – Goals

#### Overview

---

This job aid provides the steps for supervisors to add goals in the online performance evaluation product, PERFORM, from NEOGOV. Action steps are indicated by bold text. Example: Click on **Submit Task** when finished.

#### Employee Goals

There are multiple actions that may be needed within the Goals component of an employee evaluation.

- Individually assign tailored goals to each employee;
- Bulk assign the same goal to multiple employees; or
- Pause an evaluation. This action would be taken if you selected Complete Task prior to assigning all goals or editing an assigned goal.

#### Please Note

- Do not select the **Submit Task** button until goals for each of your direct reports are entered and accurate.
- If you select the **Submit Task** button prematurely, you will be required to individually pause each evaluation to make edits.
- It is recommended you have well scripted/defined goals before you begin
- Only the creator of a goal can edit the goal. **Submit Task** will be the final step in the goal process. Instructions for Submit Task are provided at the end of this document.

#### Start Here

To access NEOGOV PERFORM to assign employee goals:

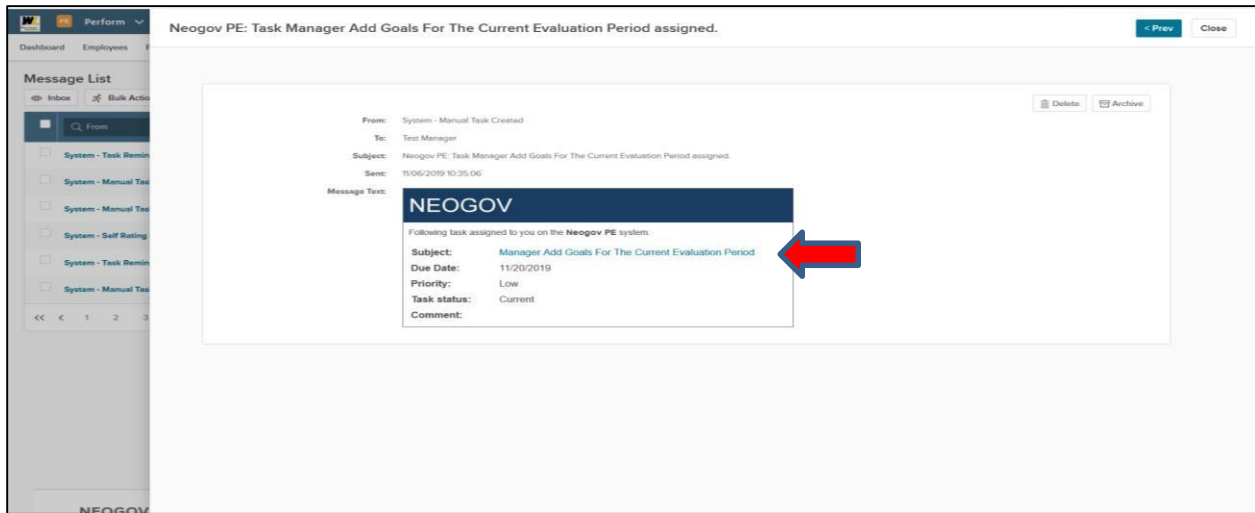
- Click on the hyperlink, **Manager Add Goals For The Current Evaluation Period**, within the email you received from NEOGOV PERFORM then login into NEOGOV or
- Access [NEGOV](https://login.neogov.com/) at <https://login.neogov.com/>. Click on the task **Add Employee Goals** from My Tasks on your Dashboard
- Login credentials will be sent via email by Human Resources

#### Adding Goals Individually from Email Notice (screenshots below)

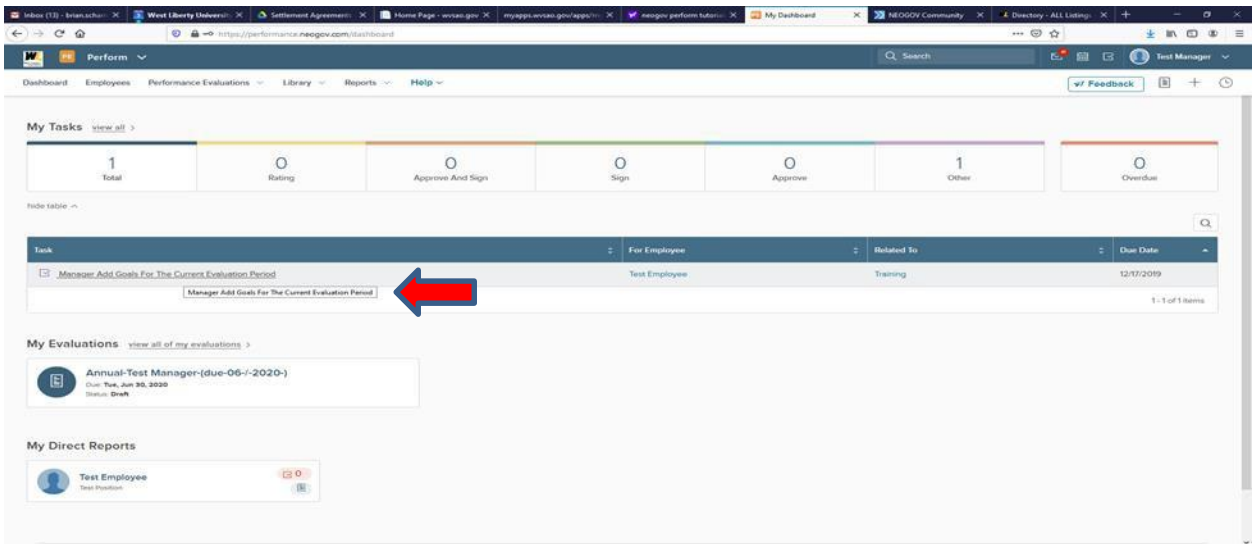
1. Upon receiving a task email from NEOGOV PERFORM (both in your WLU email and within NEOGOV) click on the hyperlink **Manager Add Goals for the Current Evaluation Period**.
2. Upon successfully logging into PERFORM you will see your Dashboard where you will click

- on **Manager Add Goals for the Current Evaluation Period** under Task.
- 3. Within Current Employee Goals click **+ Add Item** on the right.
- 4. Add the Goal Name, select a Category, add the goal description and the due date. You may also add reminder settings. Click **Save**. "Goal created for employee successfully" will appear in a green box.

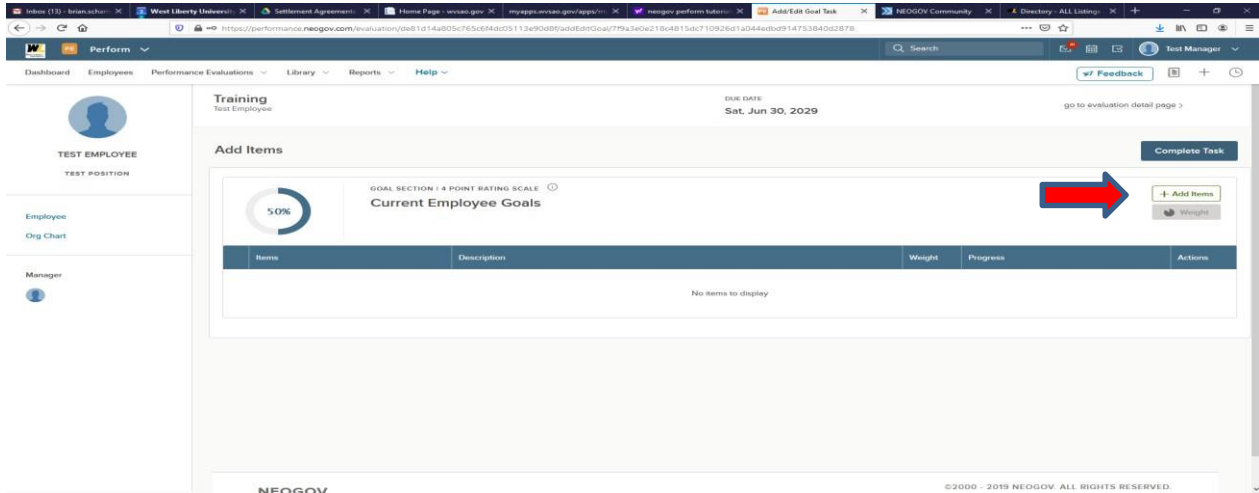
Step 1. Email notification within NEOGOV- click on Manager Add Goals for the Current Evaluation Period in the subject line.



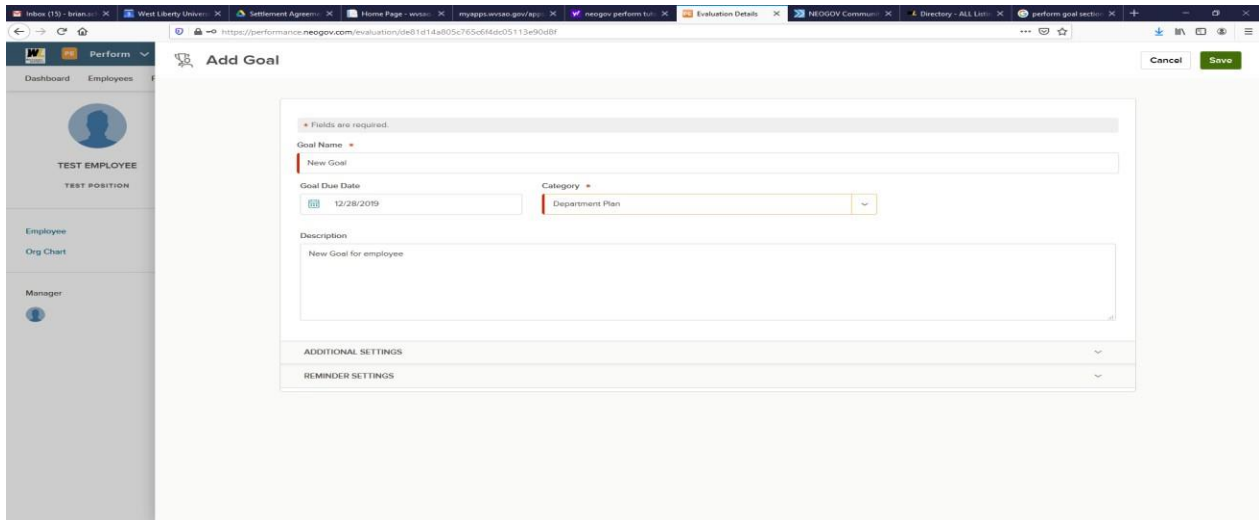
Step 2. NEOGOV PERFORM Dashboard- click on Manager Add Goals for the Current Evaluation Period under Task



Step 3. Within Current Employee Goals click + Add Item on the right.



Step 4. Add the Goal Name, select a Category, add the goal description and the due date. You may also add reminder settings. Click Save. "Goal created for employee successfully" will appear in a green box.



## To Edit a Goal (screenshots below)

1. Within the current employee goals page, click the **pencil icon** under Actions and a window of the goal detail page will appear
2. Make any necessary changes and click **Save**

Step 1. Current Employee Goals page- Click the pencil icon across from the goal you wish to edit

The screenshot shows the 'Current Employee Goals' page. At the top, there's a navigation bar with 'Perform' and a search bar. Below that, there's a sidebar with 'TEST EMPLOYEE' and 'TEST POSITION'. The main content area has a '50%' progress indicator and a table of goals. The table has columns: Items, Description, Weight, Progress, Due Date, and Actions. A red arrow points to the pencil icon in the Actions column for the goal 'Goal 3 - Manager Present 3 professional d...'. Below the table, there's a section for 'Future Employee Goals' with a table containing one goal: 'Develop 500 new courses.' with a due date of 05/15/2021 and a pencil icon in the Actions column.

Step 2. Edit Goal page- Make any necessary changes and click Save.

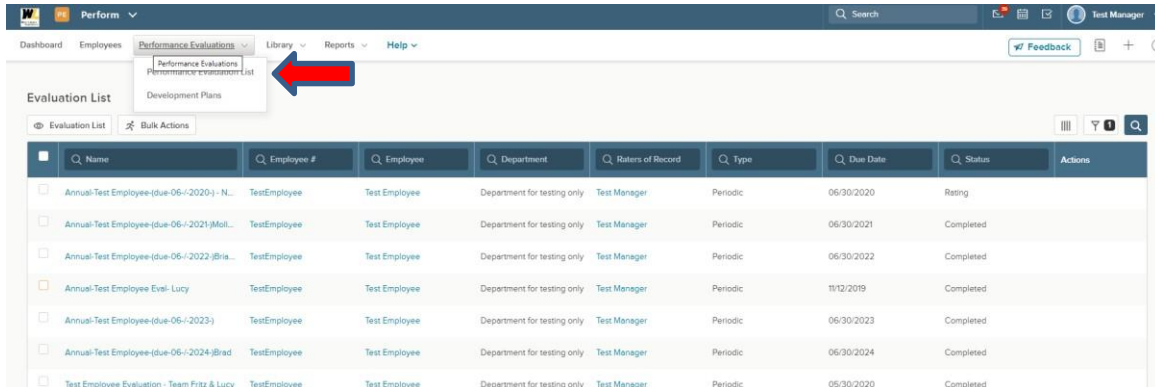
The screenshot shows the 'Edit Goal' page. The goal name is 'Goal 3 - Manager Present 3 professional development workshops'. The goal due date is 05/15/2020 and the category is Department Plan. The description is 'Editing this goal'. The priority level is Medium. The reminder settings are: Reminder Notices: On, 2 Weeks Before, 1 Week Before; Overdue Notices: On, Every 2 Days. A red arrow points to the Save button.

## Adding Goals via Bulk Actions (screenshots below)

If employees share the same goals, supervisors have the ability to bulk assign the same goal. The Performance Evaluations List is a comprehensive list of your evaluations and your direct reports' evaluations. From the list, you can bulk assign goals to multiple evaluations.

1. On the dashboard menu, hover over **Performance Evaluations** and select **Performance Evaluation List**.
2. **Check the box** next to the name of the employee evaluation(s) to whom you want to assign goal.
3. Select **Bulk Actions** from above the list once all appropriate evaluations have been selected
4. Select **Assign Goals** from the bulk actions fly-out.
5. You are then re-directed to Step 2 of 3: Goals Assignment. Click **+ Goal** on the right side to add new goals as needed for the employees selected. Click **Save**, then **Next**.
6. On the Step 2 of 3 Confirmation page, review the information and click **Submit**.
7. On the Step 3 of 3 Bulk Actions Status page, you will see the action process. 100% is success. Failed records will appear in the Failed Records section. Repeat steps for other bulk actions.

Step 1. PERFORM Dashboard- Hover over Performance Evaluations and select Performance Evaluation List.



The screenshot shows the PERFORM Dashboard interface. At the top, there is a navigation bar with 'Perform' and a search bar. Below the navigation bar, there are tabs for 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The 'Performance Evaluations' tab is active, and a dropdown menu is open, showing 'Performance Evaluations', 'Performance Evaluation List', and 'Development Plans'. A red arrow points to the 'Performance Evaluation List' option. Below the navigation bar, there is a section titled 'Evaluation List' with a 'Bulk Actions' button. The main content area displays a table with the following columns: Name, Employee #, Employee, Department, Raters of Record, Type, Due Date, Status, and Actions. The table contains several rows of evaluation records.

Name	Employee #	Employee	Department	Raters of Record	Type	Due Date	Status	Actions
Annual-Test Employee-(due-06-/2020)- N...	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	06/30/2020	Rating	
Annual-Test Employee-(due-06-/2021)(Moi...	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	06/30/2021	Completed	
Annual-Test Employee-(due-06-/2022)(Bria...	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	06/30/2022	Completed	
Annual-Test Employee Eval- Lucy	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	11/12/2019	Completed	
Annual-Test Employee-(due-06-/2023)	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	06/30/2023	Completed	
Annual-Test Employee-(due-06-/2024)(Brad	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	06/30/2024	Completed	
Test Employee Evaluation - Team Fritz & Lucy	TestEmployee	Test Employee	Department for testing only	Test Manager	Periodic	05/30/2020	Completed	

Steps 2 and 3. Check the box next to the evaluations to which you want to assign the same goal then click on Bulk Actions.

The screenshot shows the 'Evaluation List' page. At the top, there are navigation tabs: 'Evaluation List' and 'Bulk Actions'. A red arrow points to the 'Bulk Actions' tab. Below the tabs is a table with columns: Name, Employee #, Employee, Department, Raters of Record, Type, Due Date, Status, and Actions. The first row is selected, indicated by a green checkmark in the 'Name' column and a red arrow pointing to its checkbox. The table contains several rows of evaluation records.

Step 4. Select Assign Goals from the Bulk Actions fly-out.

The screenshot shows the 'Evaluation List' page with the 'Bulk Actions' fly-out menu open. The menu is titled 'Actions' and has a 'Done' button. It contains two sections: 'EXPORT ACTIONS' and 'EVALUATION BULK ACTIONS'. The 'EVALUATION BULK ACTIONS' section is highlighted, and a red arrow points to the 'Assign Goals' option. The table below the menu shows the same evaluation records as in the previous screenshot.

Step 5. Goals Assignment- Click + Goal on the right side to add new goals as needed for the employees selected. Click Save, then Next.

The screenshot shows the 'Step 2 of 3: Goals Assignment' interface. At the top, there is a message: "No Goals have been added". Below this is a table titled "Selected Evaluations" with the following data:

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
Annual Test Employee-Blue	Test Employee	Department for testing only	Periodic	05/30/2020	Rating	No	Current Employee Goals
Team Fritz & Lucy 2	Test Employee	Department for testing only	Periodic	05/30/2020	Before Ratings	No	Current Employee Goals

At the bottom of the page, there are two buttons: "Cancel" and "Next". A red arrow points to the "Next" button.

Step 6. Confirmation Page- Review the information and click Submit

The screenshot shows the "Step 2 of 3: Confirmation Page" interface. It displays a summary table of evaluations with the following data:

Employee Name	Evaluation Name	Evaluation Type	Evaluation Status	Evaluation Due Date	Section Name	Section Weight	Section Response Format
Test Employee	Annual Test Employee-Blue-05...	Periodic	Rating	05/30/2020	Current Employee Goals	50%	4 Point Rating Scale
Test Employee	Team Fritz & Lucy 2	Periodic	Before Ratings	05/30/2020	Current Employee Goals	50%	4 Point Rating Scale

At the bottom of the page, there are two buttons: "Edit" and "Submit". A red arrow points to the "Submit" button.

Step 7. Bulk Actions Status- Review and click Submit. 100% is success. Failed records will appear in the Failed Records section.

Step 3 of 3: Bulk Actions Status

Go back

Action progress

If selecting many records, the bulk action may require some time to complete. You can check the progress and results of the bulk action on this screen.

Bulk operation is complete, records that could not be processed are shown below.

100%

Need to go? You can always find this screen by visiting this link:  
<https://performance.neogov.com/evaluation/BulkOperationStatus/ectb1a227-4b39-45d2-b444-8819d333cc5/>

Failed Records

Name	Employee	Type	Due Date	Status	Released	Overdue	Language	Archived	Status Message
No Results Found									
No items to display									

## Submit Task

This is the final step in the Add Employee Goals process. Once you have added all goals and/or updated existing goal(s), you must complete the task of Add Employee Goals.

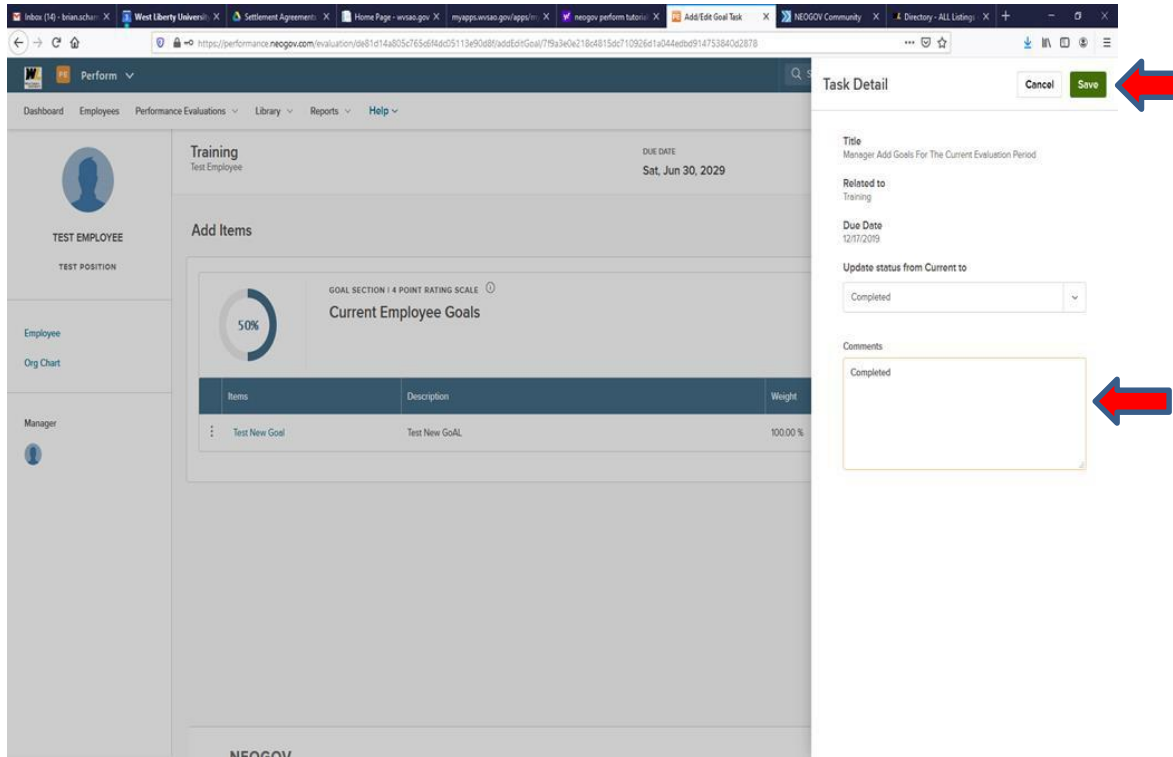
1. Go directly to the **Submit Task** button
2. Click the **Submit Task** button. You will notice a Task Detail screen appear appears. Enter comments relative to the goals then click save. You will receive the confirmation, "Step is completed!"

The Submit Task step removes the Add Employee Goals task from your dashboard and triggers an email to your direct report to acknowledge the goals. If you do not click on the Submit Task button the task will remain on your dashboard and the employee WILL NOT receive notification to acknowledge goals assigned.

Step 1. Click on Submit Task

The screenshot shows a web application interface for performance evaluations. The page title is "Cabinet Bulk EE 2". Below the title, it says "EMPLOYEE: TEST EMPLOYEE" and "DUE DATE: MON, JUN 30, 2031". There is a "Go to evaluation detail page >" link. The main content area is titled "Add Content to Evaluation". It features a circular progress indicator showing "33.33%". Below this is a section for "GOAL SECTION 1 4 POINT RATING SCALE" with the heading "Current Employee Goals". There are two buttons: "+ Add Items" and "Weight". Below this is a table with columns "Items", "Description", "Weight", and "Actions". The table is currently empty, with the text "No items to display" in the center. A red arrow points to a green "Submit Task" button in the bottom right corner of the main content area. The footer of the page says "©2000 - 2019 NEOGOV. ALL RIGHTS RESERVED." and the system tray shows the time as 7:40 AM on 12/11/2019.

Step 2. Task Detail screen -Enter comments and click Save. You will see the confirmation message.

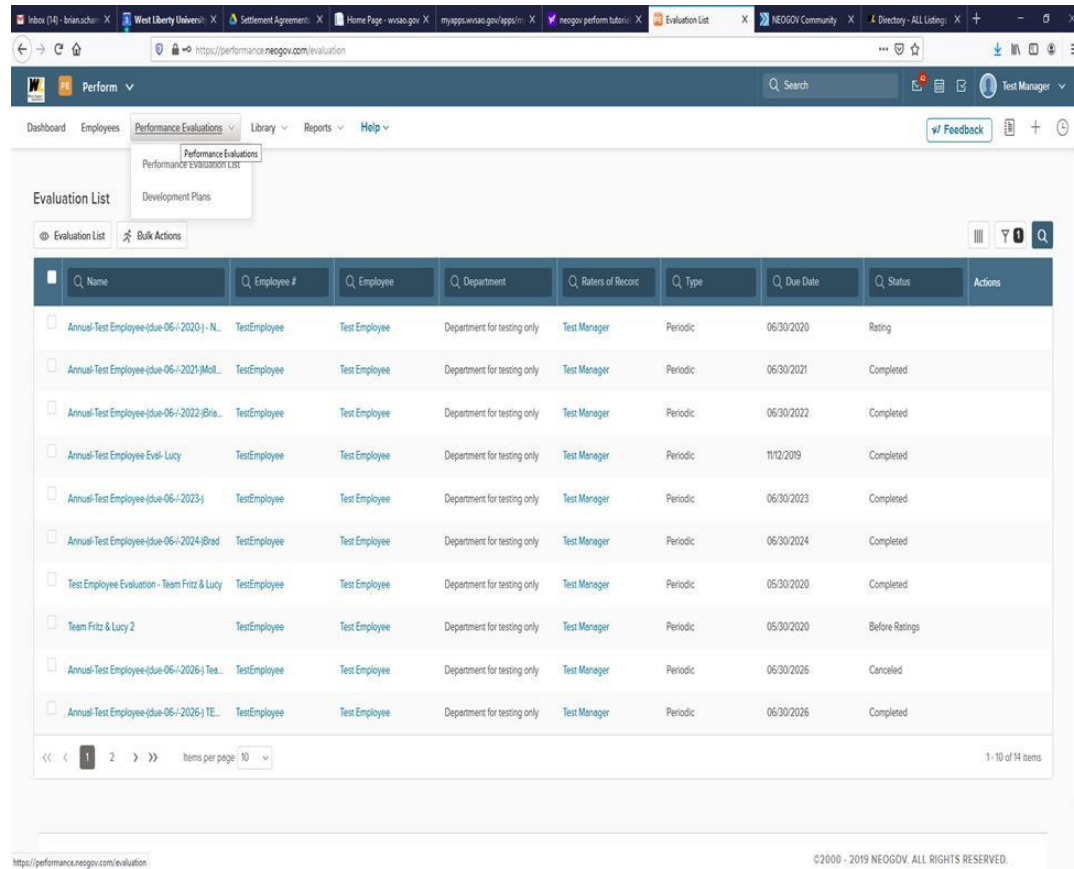


If you have a need to edit goals after the complete task button has been selected and the task is removed from your dashboard, you can only do so by Pausing the evaluation.

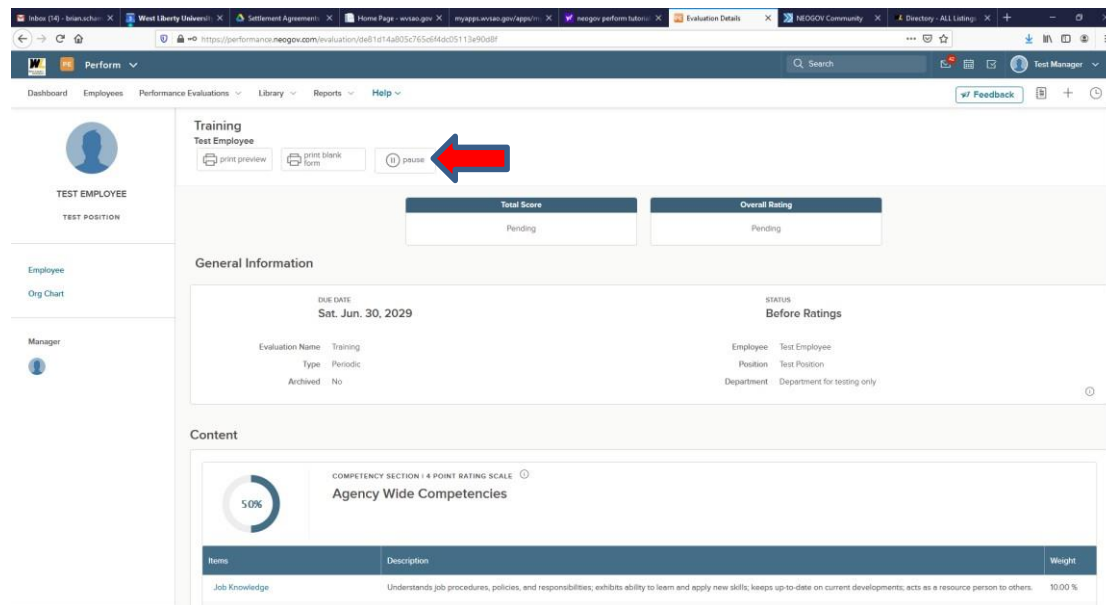
### Pausing an evaluation (Screenshots below)

1. To pause an evaluation to edit a goal that has been assigned to an employee, go to the evaluation details page. You can get to the evaluation details by clicking **Performance Evaluation** and selecting **Performance Evaluation List** from the menu. Click the evaluation name of the evaluation you want to pause.
2. Click the **Pause** button.
3. You will receive a message asking if you wish to continue. Click **Continue**.
4. The evaluation is now in Draft status and available for you to add additional goals and/or edit goals.
5. Follow the appropriate steps to add and/or edit goals previously documented. Once all goals have been added/edited you **must start the evaluation**
6. Click the **Continue** button to resume the evaluation process

Step 1. Evaluation Details page- Click Performance Evaluation and select Performance Evaluation List from the menu. Click on the name of the evaluation you want to pause.



Step 2. Click Pause.



Step 3. Pause Evaluation screen- Click Continue.



Step 4. The evaluation is in Draft status and available for you to add additional goals and/or edit goals.

The screenshot shows the Performance Evaluation system interface. The top navigation bar includes "Dashboard", "Employees", "Performance Evaluations", "Library", "Reports", and "Help". The main content area is divided into sections:

- TEST EMPLOYEE**: A sidebar on the left with a profile icon and "TEST POSITION".
- Performance Metrics**: A list of criteria with descriptions and percentages. For example, "Communicates well with others" is at 100.00%.
- Current Employee Goals**: A section with a 50% progress indicator and a table of goals. A red arrow points to the "+ Add Items" button.
- Future Employee Goals**: A section with a "+ Add Items" button.
- Employee Narratives**: A section for text input.

Items	Description	Weight	Progress	Due Date	Actions
Test New Goal	Test New GOAL	100.00 %	0%	12/28/2019	✎ ✕

Step 5. Follow the appropriate steps to add and/or edit goals previously documented. Once all goals have been added/edited you must restart the evaluation

The screenshot shows the 'Perform' application interface for a 'Training' evaluation. The top navigation bar includes 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Reports', and 'Help'. The main content area is divided into several sections:

- Training Section:** Contains 'Test Employee', 'print preview', 'print blank form', and a 'start' button with a play icon, which is highlighted by a red arrow.
- Summary Cards:** Two cards showing 'Total Score' and 'Overall Rating', both with a 'Pending' status.
- General Information:** A table with fields for 'DUE DATE' (Sat. Jun. 30, 2029), 'STATUS' (Draft), 'Evaluation Name' (Training), 'Type' (Periodic), 'Archived' (No), 'Employee' (Test Employee), 'Position' (Test Position), and 'Department' (Department for testing only).
- Content Section:** Features a 'COMPETENCY SECTION | 4 POINT RATING SCALE' for 'Agency Wide Competencies' with a 50% progress indicator. Below is a table with columns for 'Items', 'Description', 'Weight', and 'Actions'. One item is listed: 'Job Knowledge' with a weight of 10.00 %.

Step 6. Activate Evaluation - Click Continue.

This screenshot shows the same 'Perform' application interface as in Step 5, but with an 'Activate Evaluation' dialog box overlaid in the center. The dialog box contains the following text:

**Activate Evaluation**

You are about to resume the process of this evaluation. It will no longer be in Draft status.

Do you wish to continue?

Buttons:   (The 'Continue' button is highlighted with a red arrow.)

The background interface is dimmed, showing the same 'Training' evaluation details as in Step 5.