SAN BERNARDINO COMMUNITY COLLEGE DISTRICT

NEOED Perform

Management Evaluation Training Guide

2022

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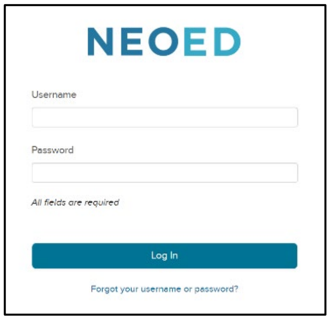
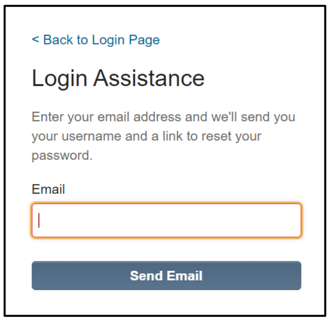
SECTION 1 - LOGIN

1. If using a device outside the district's network, go to the [NEOED website]().



Enter your username and password then click **Log In.**

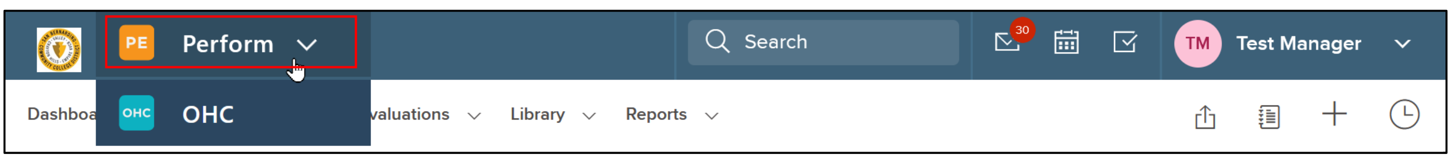
Your username should match your district assigned email but your password will be whatever you last set it as. Username format is <username>@sbccd.cc.ca.us (jdoe@sbccd.cc.ca.us)



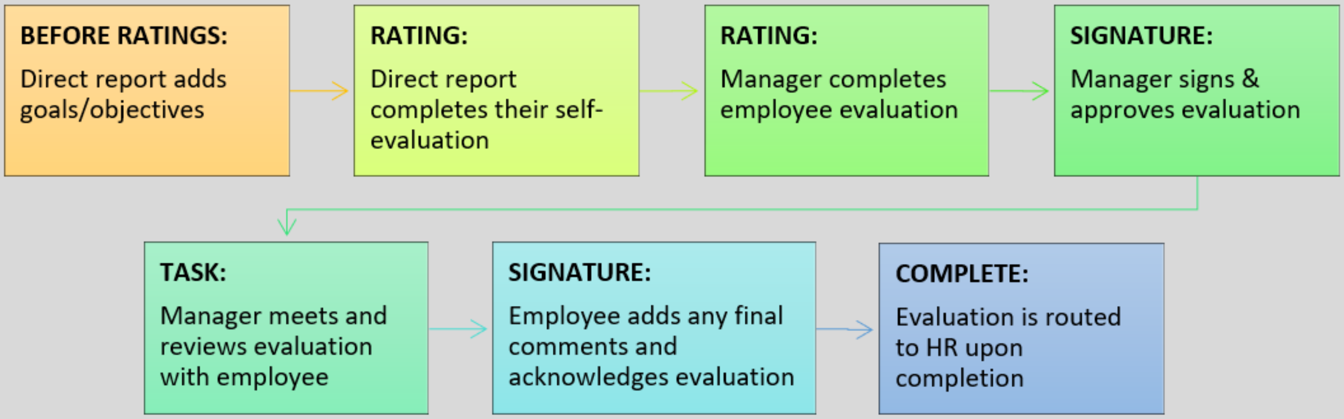
If you do not know or forget your username or password, click the "**Forgot your password?**" link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.

NOTE: Passwords must be a minimum of eight (8) characters and contain at least one number, one upper case letter, one lower case letter, and a special character.

Since we also use other modules in NEOED, once you log in you may need to use the App Menu in the top left to toggle over to Perform.



SECTION 2 – MANAGEMENT EVALUATION PROCESS



***Note:** This chart only encompasses the processes fulfilled through the NeoEd module. This does not include additional requirements outlined in AP 7150 (e.g. survey, committee, etc.) Please refer to AP 7150 to determine whether there are additional requirements for the evaluation process based on the manager's classification.

BEFORE RATINGS

Add goals/objectives to your evaluation
Employee

Direct report adds goals/objectives from prior evaluation period and/or establishes new goals for upcoming evaluation period.

RATINGS

Self-Rating
Employee

Rating
Manager

Includes sections for rating competencies, recording narratives, progress achieved, and setting future goals.

AFTER RATINGS

Meet with employee to review evaluation
Manager

Approval & Signature
Manager

Once all ratings have been entered, the manager must sign the evaluation. If there are any changes needed, manager can deny the evaluation to open the rating form again.

After signature, the manager will be tasked with scheduling and meeting with employee to deliver evaluation.

Release evaluation to employee

Signature
Employee

After signature, the employee must sign and acknowledge completion of their evaluation. At this point, they may submit their own comments.

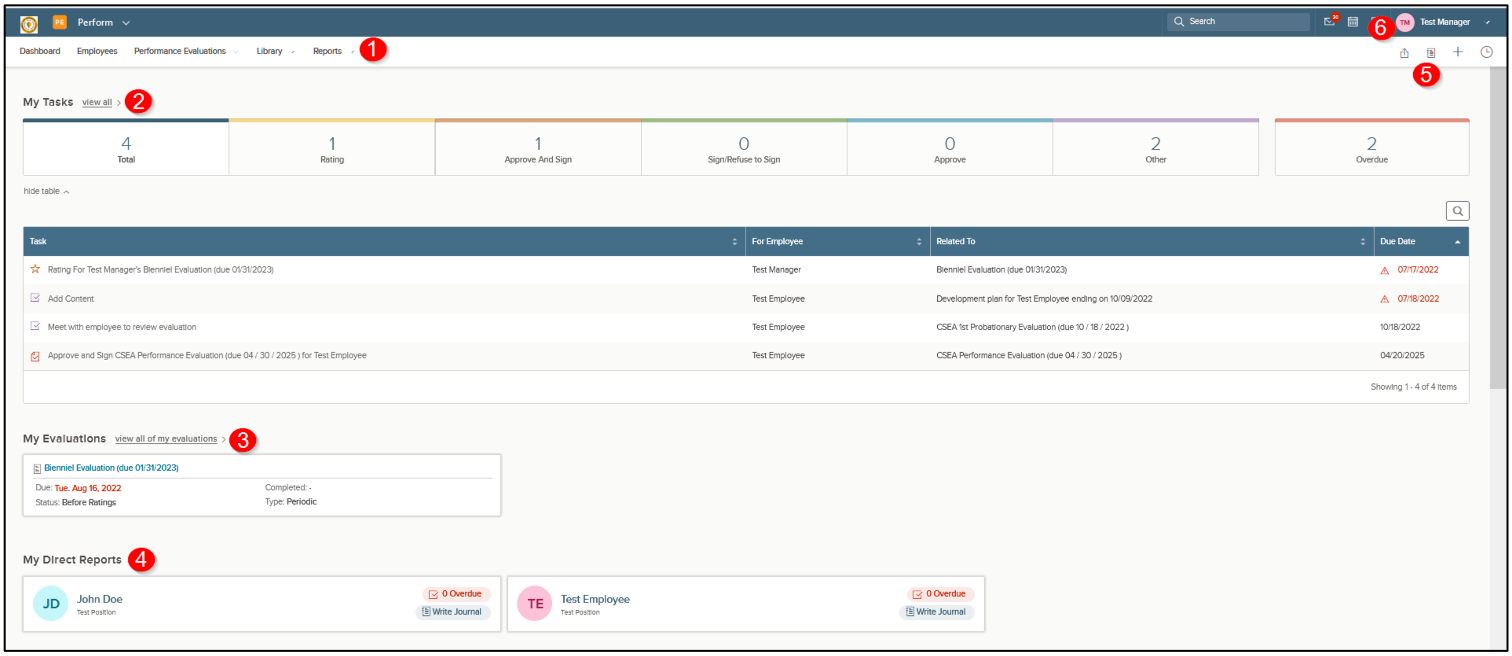
Although signature does not constitute agreement with the evaluation, employees will still be given the option to refuse signature.

Evaluations will populate in the month of September prior to the year due so that you may plan for upcoming evaluations. The form will not be available to start completing until October 1st. You will receive email notification when your action is required. Reminder and overdue notices will also be sent as needed.

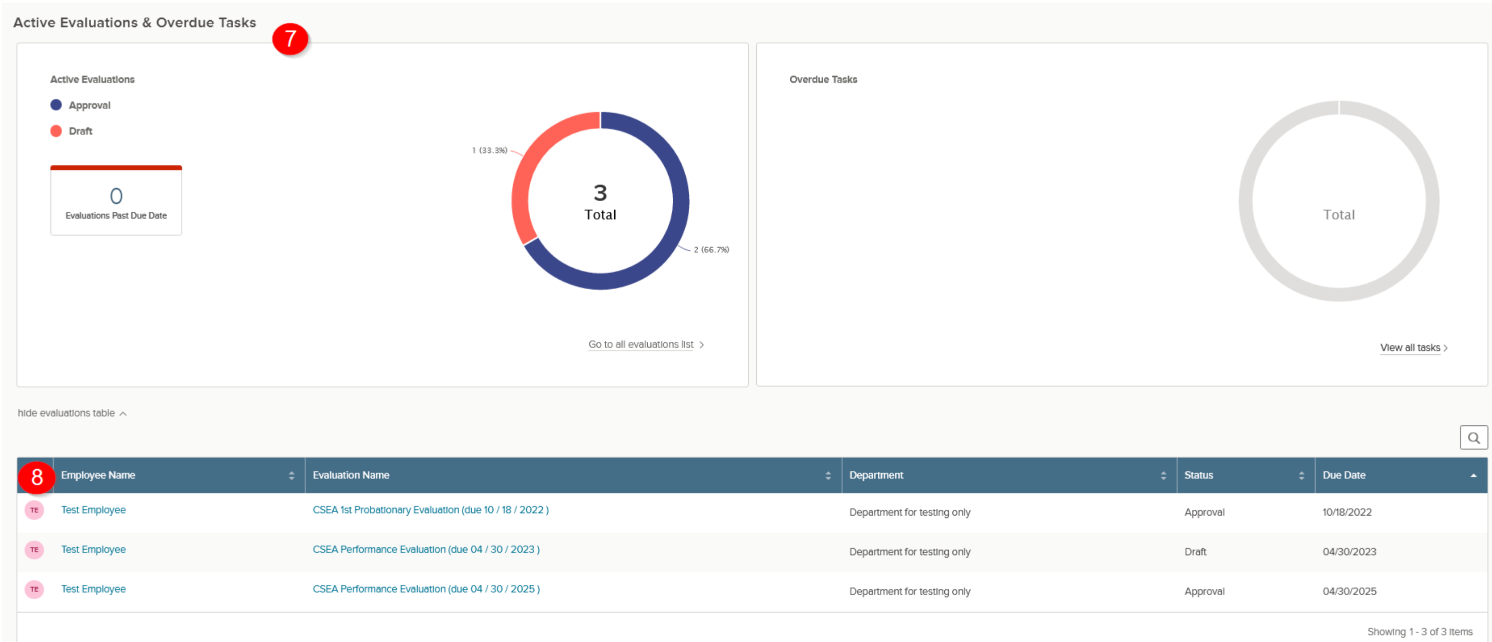
SECTION 3 - NAVIGATING THE DASHBOARD

Evaluation Dashboard

Upon logging into Perform, you will arrive at your **Dashboard.** The Dashboard is a central location from which all tasks can be completed in the system.



1. **Dashboard Menu:** Based on HR Configuration you see the following tabs:
   - The **Employees List**
   - The Performance Evaluation List
   - The **Library**
   - Reports
2. **My Tasks:** Contains all tasks currently requiring your action
   - Color-coded boxes located within this section can be used to filter the various task types
3. **My Evaluations:** Displays your three most recent performance evaluations (if applicable)
4. **My Direct Reports:** All of your Direct Reports
5. **Journal Hub:** Contains all Journal Entries that you have created, as well as any pending entries
6. **My Profile:** Access your Talent profile, update your password, and sign out of Perform.

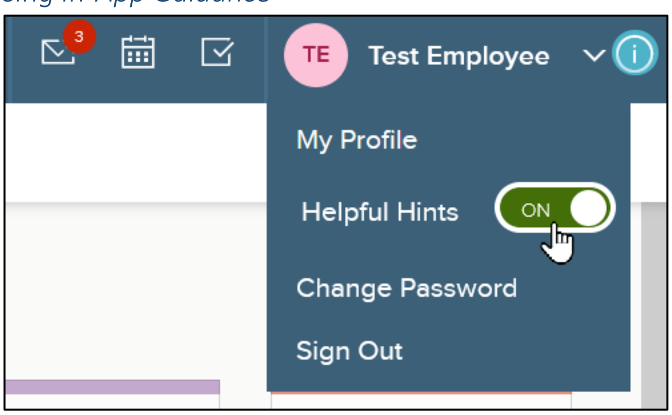


7. **Active Evaluations and Overdue Tasks**: Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and yourself
8. **Active Evaluation and Overdue Tasks List:** Updates to reflect the corresponding information selected on the graphs above

In-App Help

Both In-App Guidance and Helpful Hints allow users to receive guided assistance directly within Perform.

Using In-App Guidance



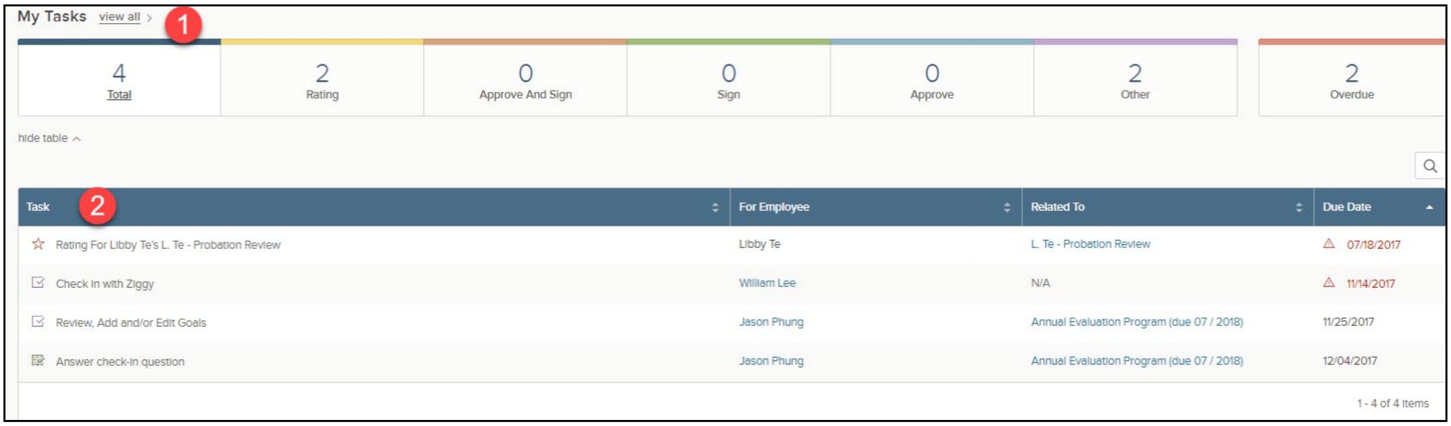
There are **Helpful Hints** that are accessible to all users. Hover over your name in the top right corner to display the menu. You can switch the toggle to **ON** to display helpful hints.

If Helpful Hints are enabled, blue icons display throughout Perform in areas where users might need more assistance.

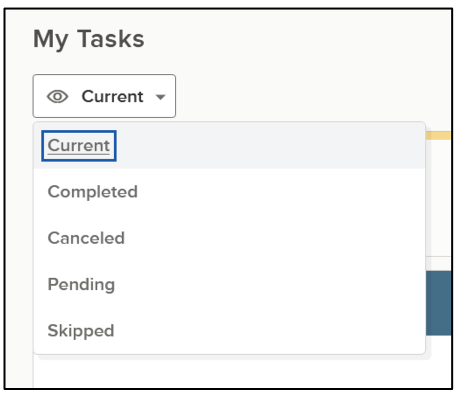
To turn off the Helpful Hints, toggle the switch back to **OFF**.

My Tasks

Any current tasks that require your action appear in **My Tasks**. You can filter on each status by selecting a task type and the list below filters appropriately.



1. **View All:** Select this to view tasks that are Current, Completed, Canceled, Pending, and Skipped



- **Current:** Tasks currently requiring action
- **Completed:** Tasks you've already acted on
- **Canceled:** Tasks no longer required
- **Pending:** Tasks pending another user's action, or tasks for *Draft* evaluations
- **Skipped:** Tasks that had been assigned to you, but skipped by an HR Admin

To **complete a task**, select the name to be re-directed to the task. More information about completing tasks is outlined in each specific section of this guide.

2. The task types are designated as follows:

- **Total:** All tasks currently requiring your action.
- **Rating:** Any rating required on a Direct Report's evaluation.
- **Approve and Sign:** Task to approve & sign the evaluation, after it's been rated.
- **Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated.
- **Approve:** Task to approve the evaluation, after it's been rated.
- **Other:** Any manual task such as having a meeting with your manager or adding goals to an evaluation.
- **Overdue:** Any task with a past due date.

	= Rate an evaluation
	= Approve and sign
	= Sign
	= Approve an evaluation
	= Other or Manual tasks

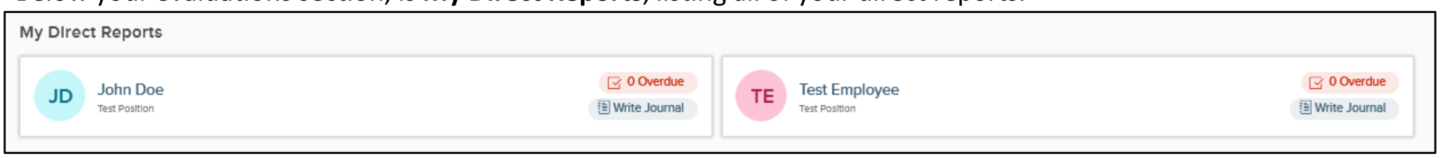
My Evaluations

Underneath the tasks section of the Dashboard is the **My Evaluations** section. Here is where employees will find their three most recent performance evaluations. Select any one of the three evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation.

To view all historical evaluations, select **view all of my evaluations**. To view the evaluation detail page of a specific evaluation, select the title of the evaluation.

My Direct Reports

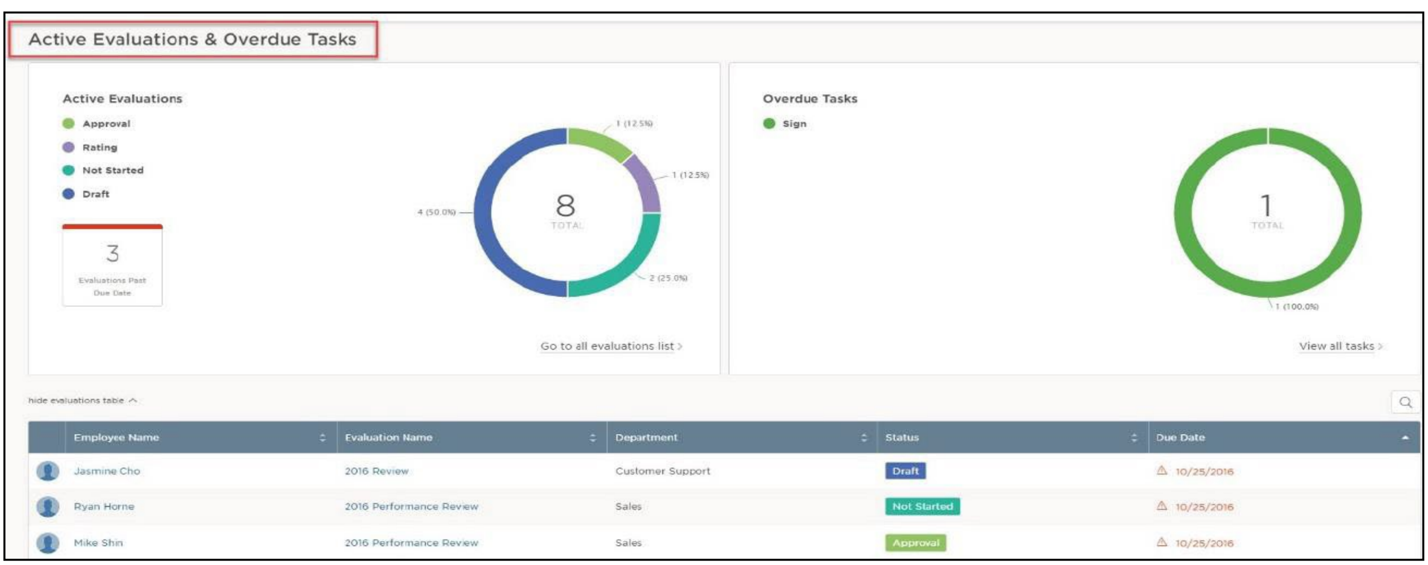
Below your evaluations section, is **My Direct Reports**, listing all of your direct reports.



By clicking on the name of your direct report, you will be re-directed to their My Profile. Additionally, you can click into their overdue tasks,  , or their journal entries,  , and a fly-out will appear for the respective item.

Active Evaluations and Overdue Tasks

The next section you will see is the **Active Evaluations and Overdue Tasks:**



The graph on the left displays all active evaluations, divided by the four different statuses: *Approval*, *Rating*, *Not Started*, and *Draft*. If you click on any respective part of the graph, the list below will filter to display the corresponding information. To revert to the total, select the center of the graph where it says **Total**.

Select the quick link **Go to all evaluations list** below the graph to be re-directed to the **Performance Evaluations List**:

To the right of the **Active Evaluations Graph** is the **Overdue Tasks Graph**:

Upon clicking on the **Overdue Tasks** graph, a fly-out will appear containing the list of overdue tasks:

To hide the evaluation table, select the **hide evaluation table** link:

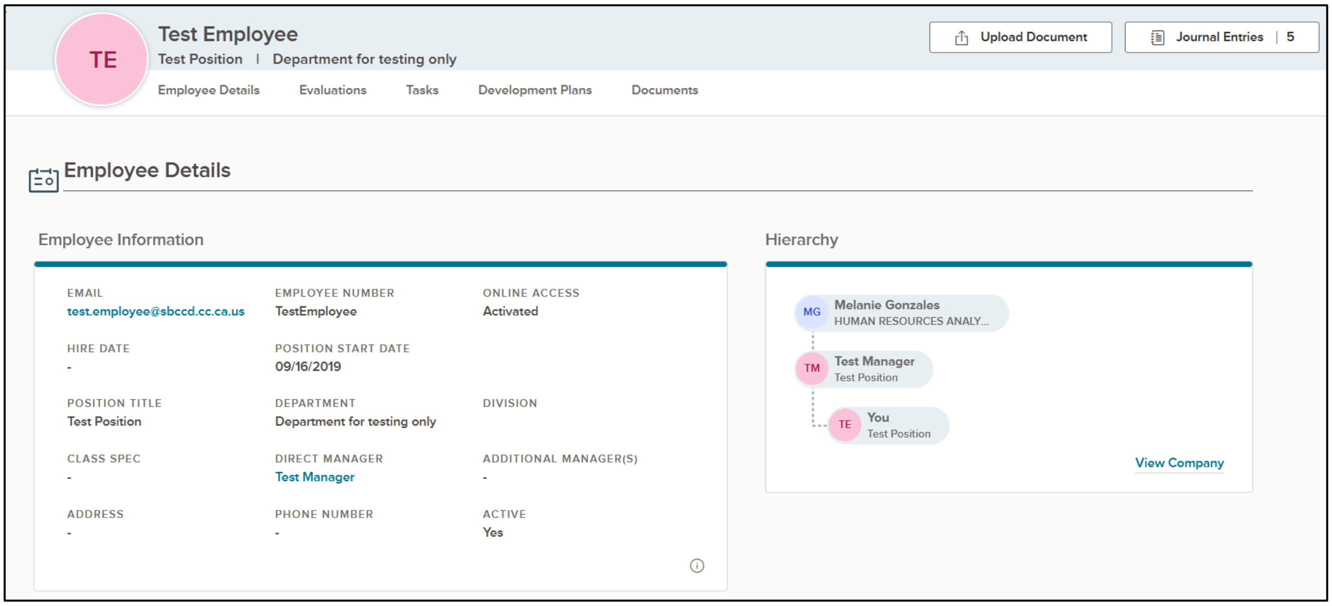
Journal Hub

All managers have access to their **Journal Hub.** The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you).

For more information, please refer to *Section 8*.

My Profile

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



From **My Profile**, you can see any Performance Evaluations, Development Plans, and all tasks that are associated to you. Note, you can also add journal entries from this page. For information on adding journal entries, refer to *Section 8*.

You may also view your immediate **Hierarchy**. To view the entire agency org chart, select **View Company**.

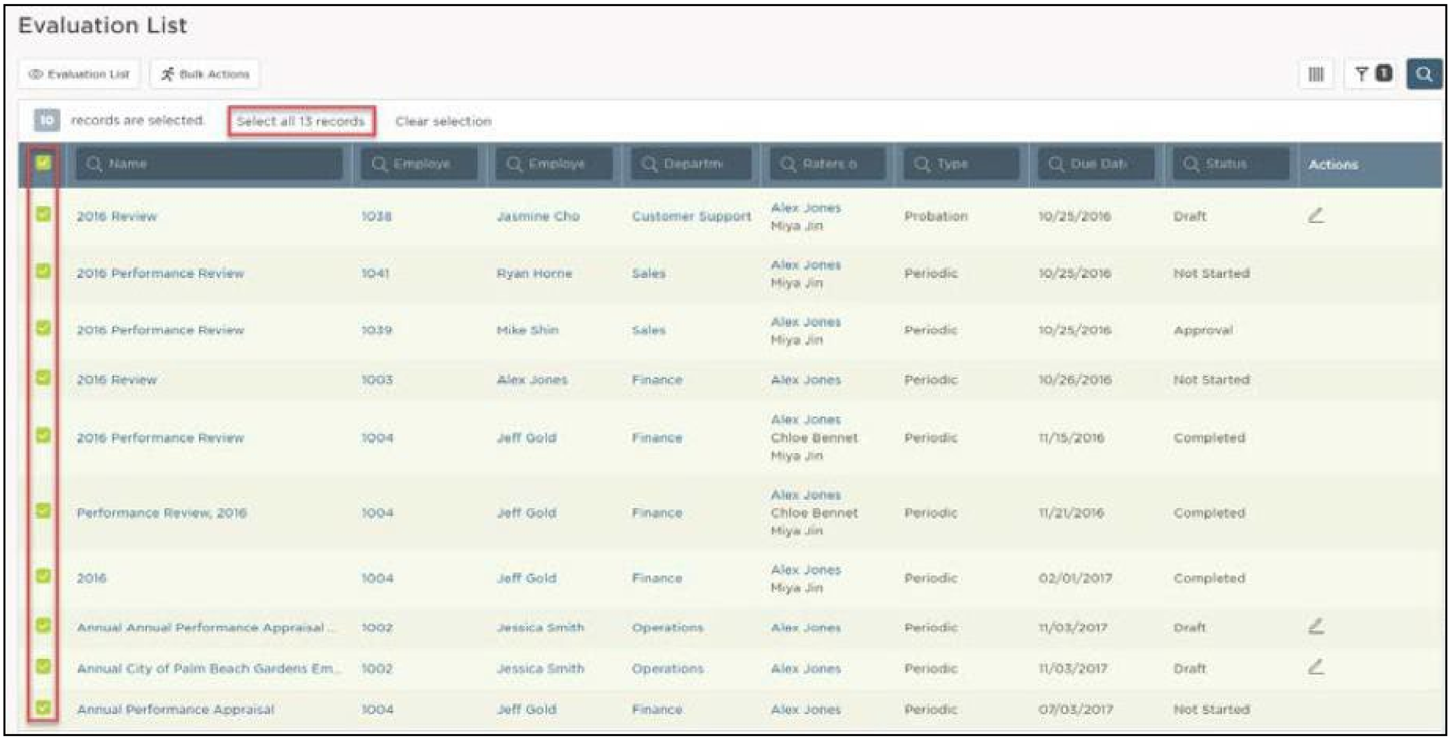
TIP! You cannot edit any of your Employee Information, such as position, email address, etc. If you need to update that information, please contact HR.

Performance Evaluations List

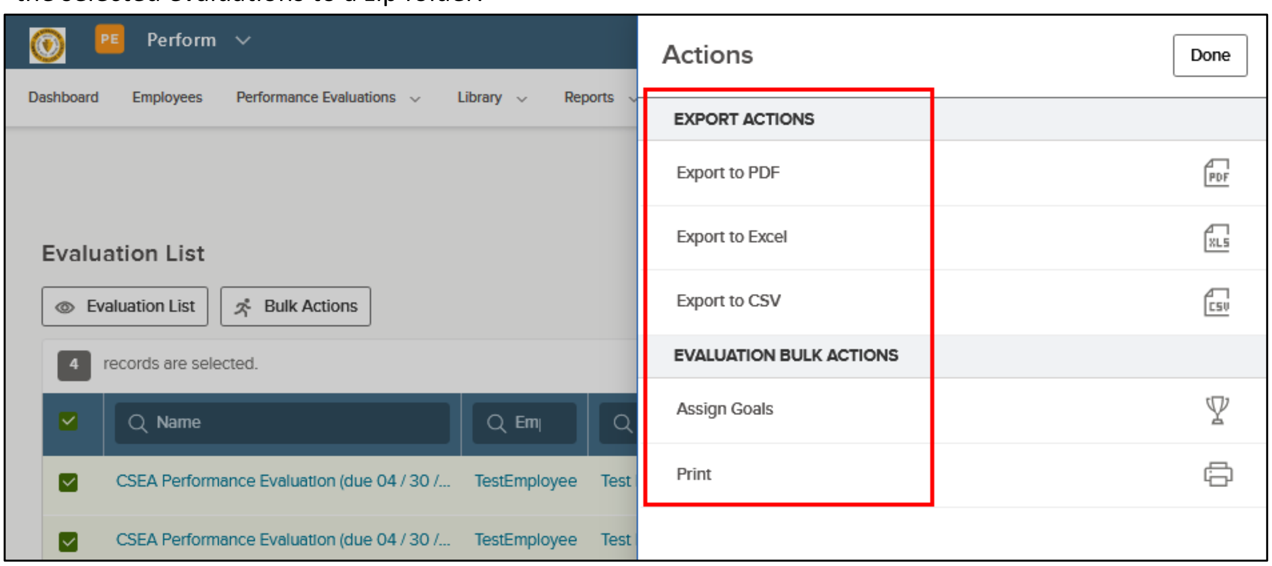
To navigate to the **Performance Evaluations List**, select the **Performance Evaluations** drop down menu from your dashboard.

The Performance Evaluations List is a comprehensive list of your evaluations and your direct report's evaluations.

You may bulk export or print the list. To do so, check the desired records or use the select all option:



When all records are selected, click on the **Bulk Actions** button and a fly-out will appear. Select the **Print** option to send the selected evaluations to a zip folder:



From the zip folder, the evaluations can be downloaded, saved or sent to print.

TIP! To export a list view of the evaluations, with all columns shown on the screen, use the **Export to PDF**, **Export to Excel** or **Export to CSV** options. Note that this is not the same as exporting the actual evaluations for printing, as seen above.

SECTION 4 – ADDING GOALS/OBJECTIVES

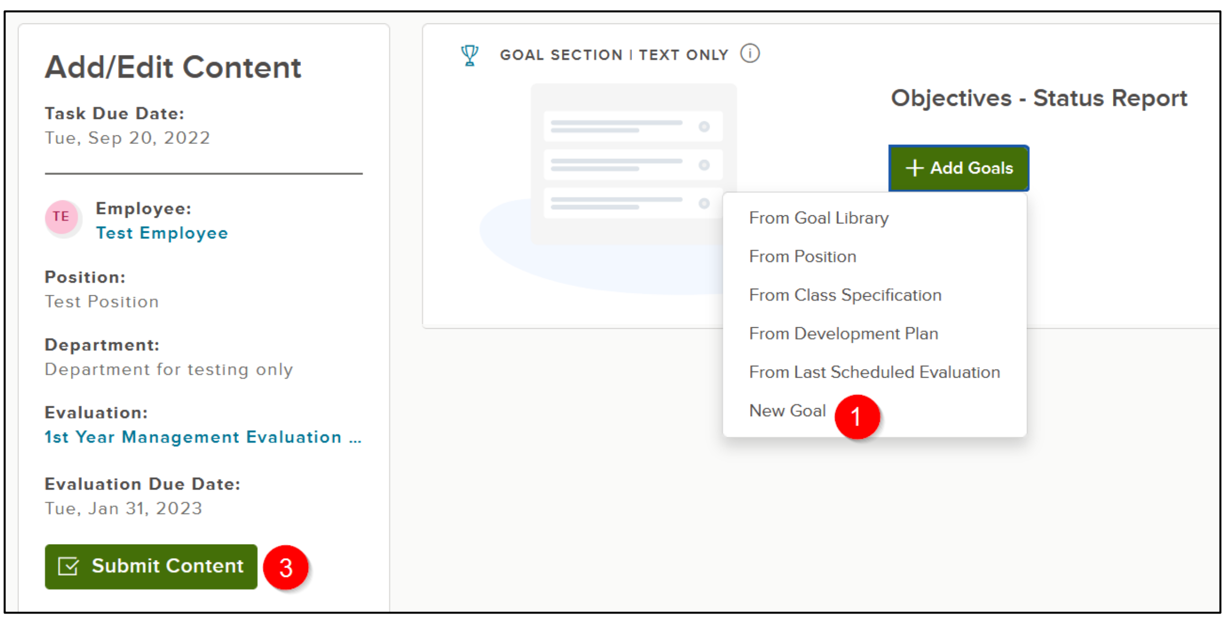
The first step of the management evaluation process is for the direct report (manager being evaluated) to add goals/objectives to their self-evaluation. To complete a task, navigate back to the **My Tasks** section of your Evaluation **Dashboard**. To navigate to your dashboard from any other page in Perform, select **the SBCCD logo** in the top left corner. Here, you see the task to **Add goals/objectives to your evaluation**.

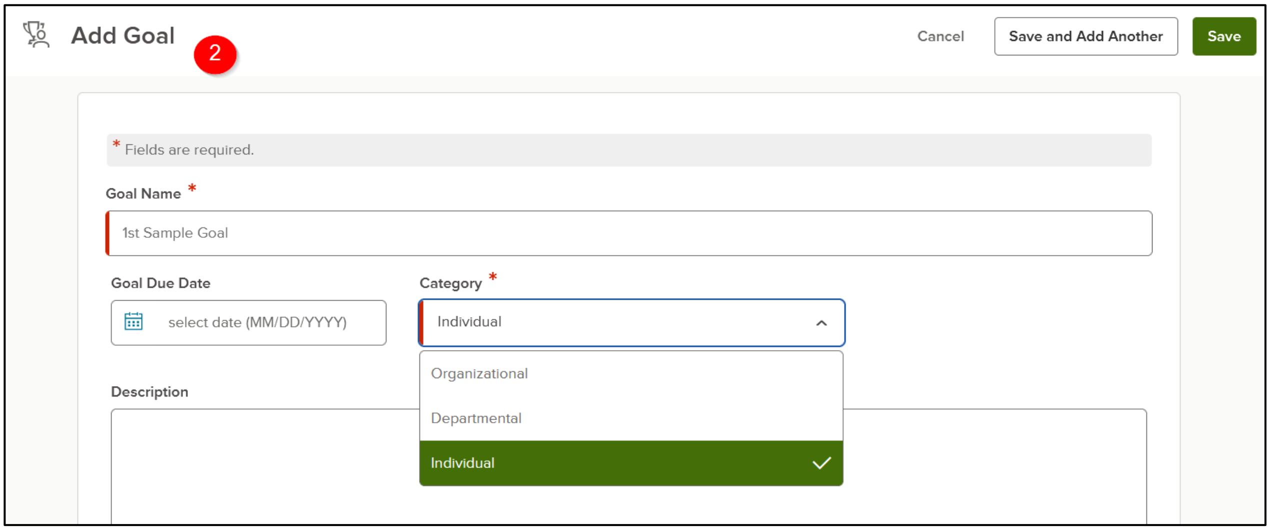
Click the **Add goals/objectives to your evaluation** task from the task list on your Dashboard.

> **TIP!** If there are many tasks requiring your action, you can use the **Other** filter box to limit the tasks displayed on your Dashboard.

The link redirects to the Objectives – Status Report form.

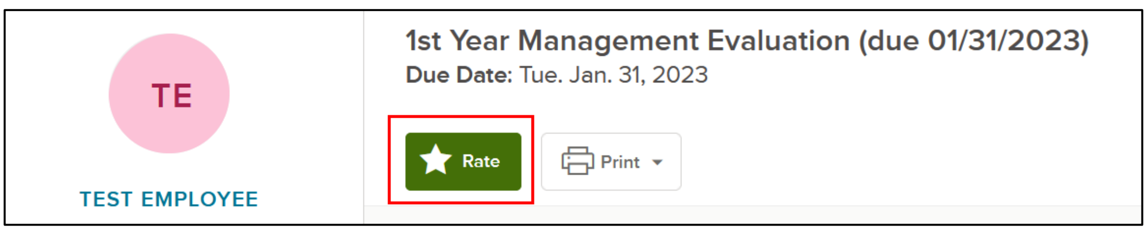
Add/Edit Content – Objective Status Report





1. To add new goals/objectives, click **Add Goals** and **New Goal.**
2. A fly-out of the Goal Form will appear**.** Here, the direct report will enter the following:
   - **Goal Name:** Enter the name of the goal.
   - **Goal Due Date:** If the goal has an expected completion date, it can be indicated here. Otherwise, leave blank.
   - **Category:** Identify whether this goal is an Organizational, Departmental, or Individual goal.
   - **Description:** Enter any comments to describe the goal/objectives.
     a. You can click **Save and Add Another** to add an additional goal/objective.
     b. You can click on **Save** to exit the form.
3. After all goals have been added, click on **Submit Content.** You will be asked to confirm submission by clicking **Yes, I'm Finished.**

You will be tasked to provide a rating for your Self-Evaluation form.



For steps on how to complete the Self-Evaluation Rating form, proceed to *Section 6: Rating Form – Self-Evaluation (Direct Report)*

SECTION 5 – RATING AN EVALUATION

The next step of the evaluation process is the ratings forms. Firstly, direct reports will be tasked with completing a self-evaluation. Upon submission, managers will be tasked with submitted their ratings. You will receive notification via email when a rating task is assigned to your dashboard.

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **the SBCCD logo** in the top left corner.

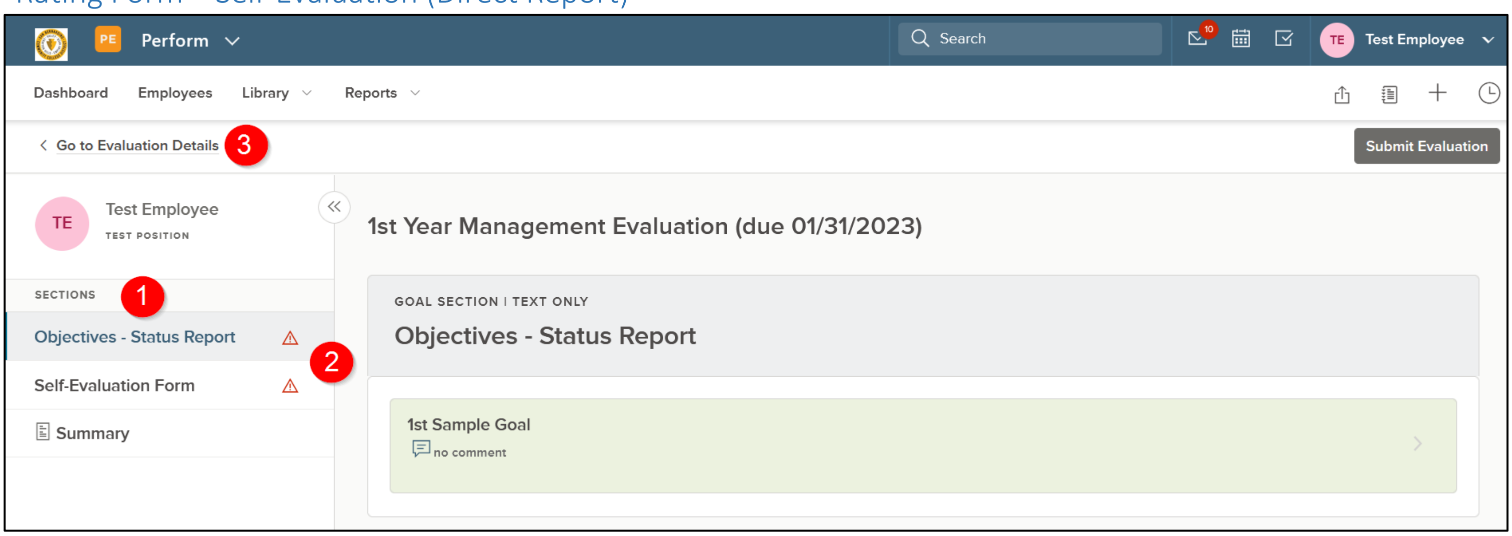
To complete a Rating, click the rating task name on the dashboard.

TIP! If there are many tasks requiring your action, you can use the **Rating** filter box to limit the tasks displayed on your Dashboard.

To begin rating, click into the task name:

The link re-directs to the Rating Form.

Rating Form – Self-Evaluation (Direct Report)



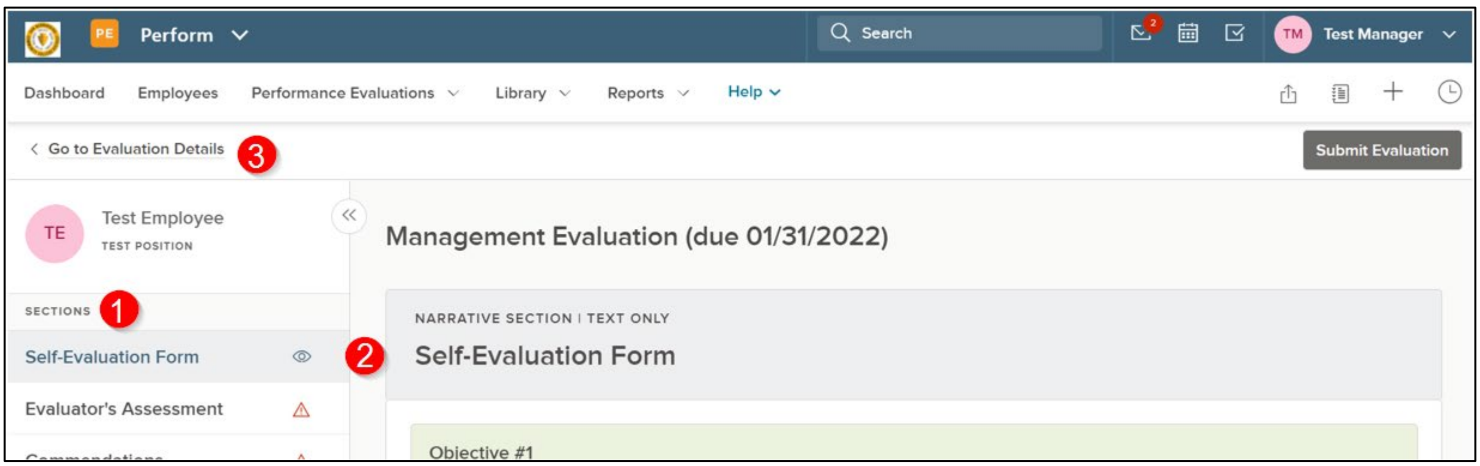
1. To **view** different items, click the various sections
2. There are two parts to complete:
   - **Objectives – Status Report:** Enter any comments/progress status you wish to report for the goals/objectives added to this evaluation.
   - **Self-Evaluation Form:** Enter all narratives for the sections of the form.
3. To leave the rating card and return back to the evaluation detail page, select back to evaluation detail page

Once the direct report has entered their self-ratings and clicked **Submit Evaluation**, the manager will be tasked with entering their ratings.

Rating Form – Self-Evaluation (Manager)

To begin rating, click into the task name:

The link re-directs to the Rating Form.



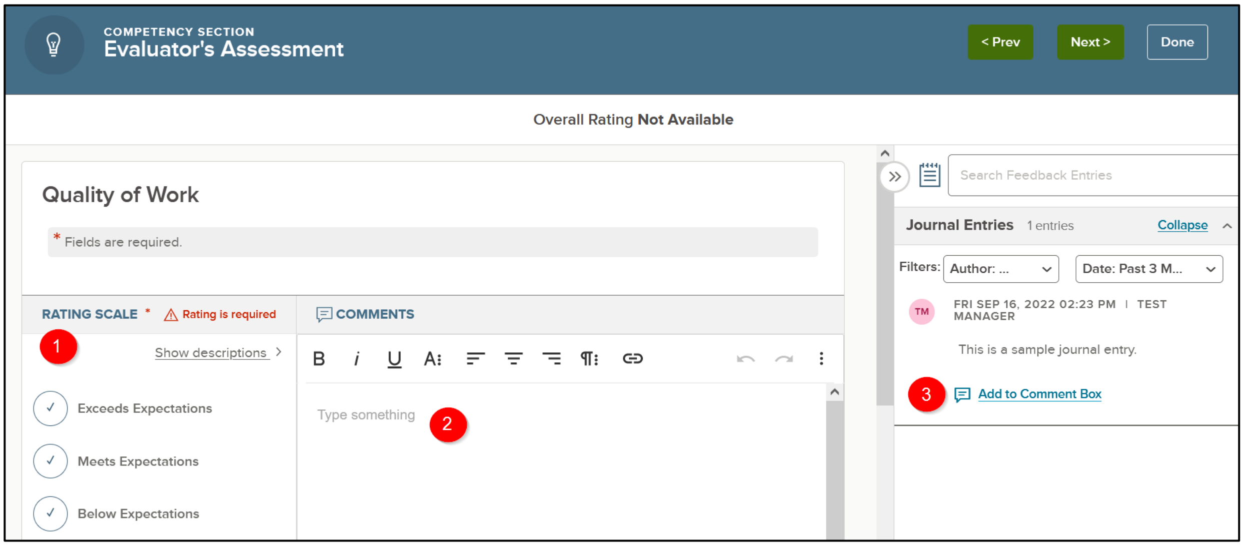
1. To **view** different items, click the various sections
2. The first part of the form is the self-evaluation completed by the direct report. This section is a read-only form for the manager to review.
3. To leave the rating card and return back to the evaluation detail page, select back to evaluation detail page

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

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

Rating Form – Competencies

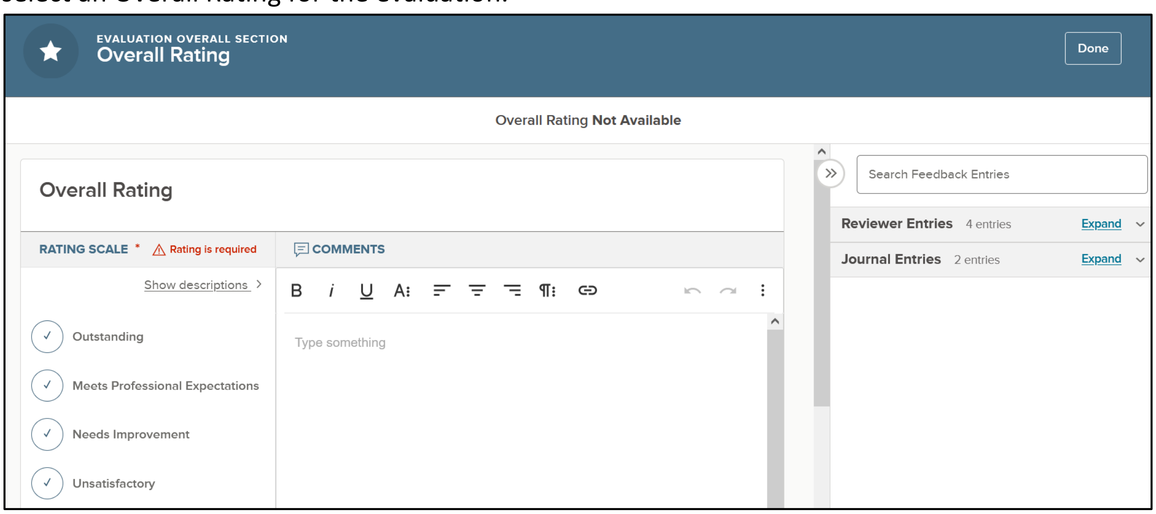
To rate an item, click an item name, e.g. Evaluator's Assessment, within a section, and a fly-out of the **Rating Card** appears (see below for further information)



1. If a rating scale is assigned, indicate the **Rating.** Otherwise, only a comments box will be visible.
2. Type any text into the **Comments** box.
    a. While rating, the system auto saves all progress made
    b. If needed, you may exit out of the rating card and resume rating at a later time. Your ratings/comments will be automatically saved.
3. The **Journal Entries** appear on the right side of the rating card. You can copy the journal entries directly into the comment box by selecting **Add to Comment Box**. Refer to *Section 8* for more information regarding journal entries.

Rating Form – Overall Rating

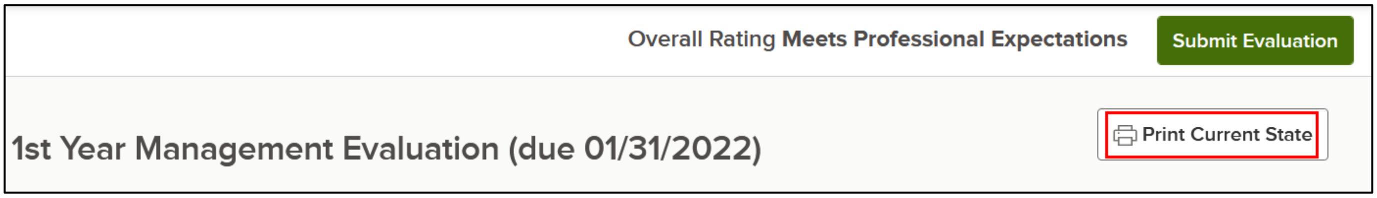
Once you have completed all required sections, go to the **Overall Rating** section. Enter any comments, as necessary and select an Overall Rating for the evaluation.



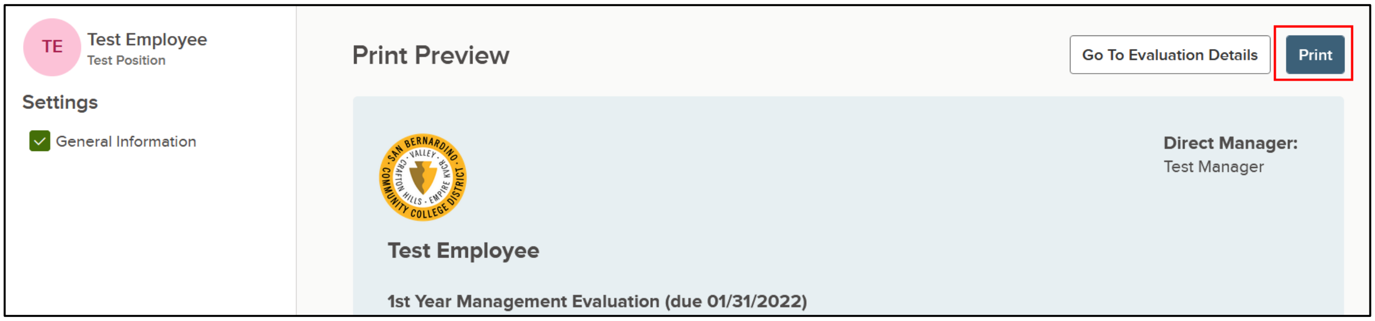
TIP! Development plans are required when employees are given a competency rating of "Below Expectations" or an overall rating of "Unsatisfactory" or "Needs Improvement" on their evaluation. Human Resources will contact you when a Development Plan is initiated based on the ratings submitted.

Rating Form – Print Current State

From the Summary section, select **Print Current State** for a printable version of the evaluation:

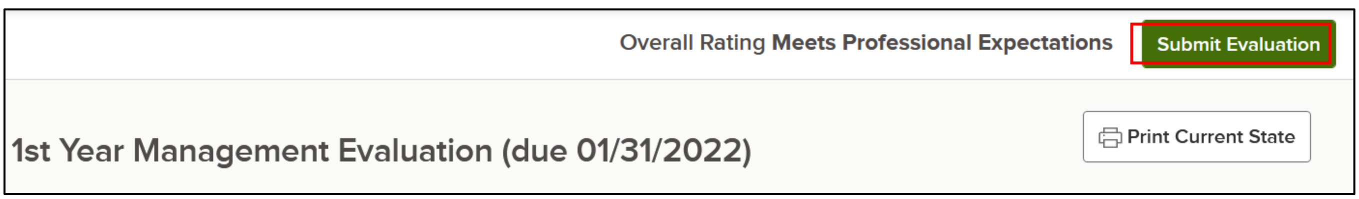


Scroll to view the entire evaluation, and select **Print**:



Rating Form – Submit Evaluation

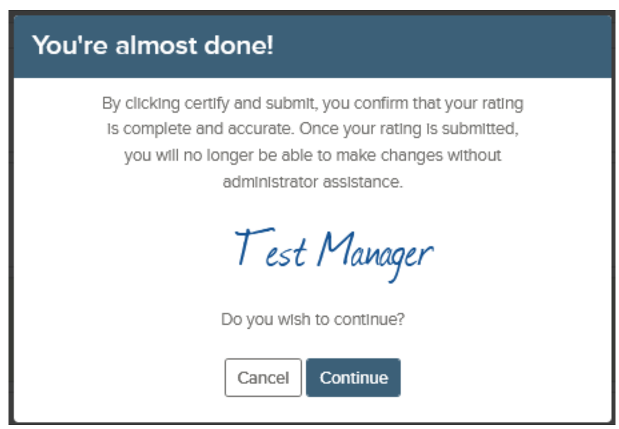
Once all sections are completed, select **Submit Evaluation** in the top-right corner:



A pop-up message will appear prompting you to continue.

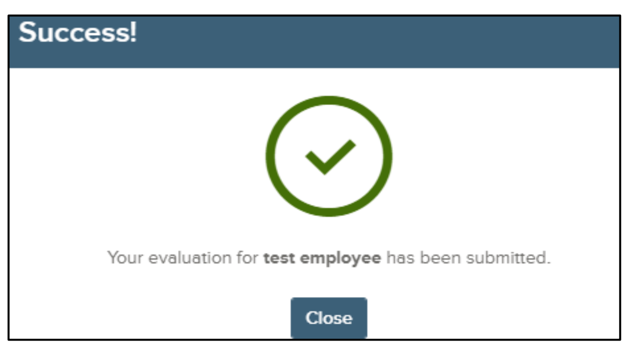
You receive a confirmation message. *Once the evaluation is submitted changes can no longer be made UNLESS the evaluation is denied during the approval process. If denied, it will revert back to the rating stage.*

If further changes are needed, click **Cancel**. Otherwise, select **Continue**.



The evaluation has been successfully submitted and ready to be delivered to the employee.

Once submitted, you will be assigned a task to **Approve & Sign** the evaluation.



SECTION 6 – APPROVING & SIGNING AN EVALUATION

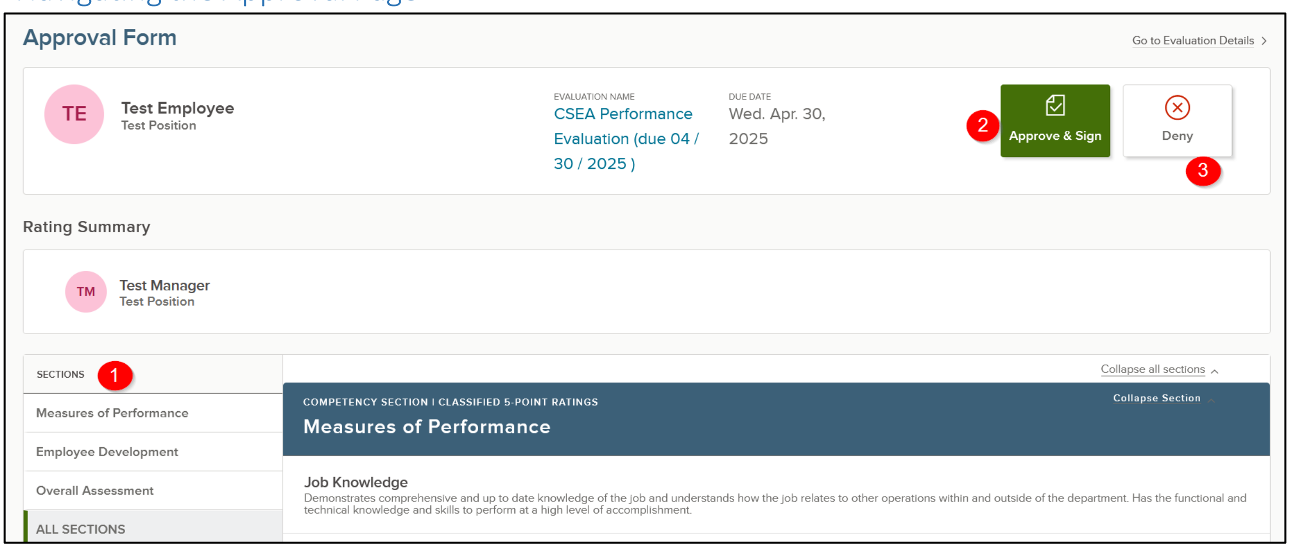
When you need to approve and/or sign, you will receive an email notification and see the task on your dashboard.

My Tasks is located on your Dashboard. Upon logging into Perform, you land on your Dashboard. To navigate to your dashboard from any other page in Perform, select **the SBCCD logo** in the top left corner. Here, you see the task to **Approve and Sign** the completed evaluation.

Click the **Approve and Sign** task from the task list on your Dashboard.

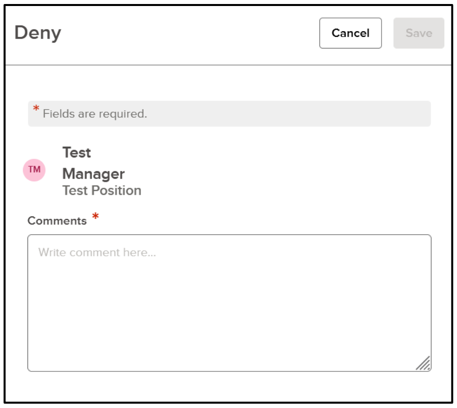
TIP! If there are many tasks requiring your action, you can use the **Approve & Sign** filter box to limit the tasks displayed on your Dashboard.

Navigating the Approval Page



1. Navigate through the various **Sections** by clicking on the name
   - Scroll through each section to review the ratings and any comments provided
2. Toggle between the **Rating Details** or the **Rating Chart**
   - The Rating Chart displays a bar graph of all raters
3. Once you have reviewed the evaluation, select **approve & sign**, or **deny**
   - If deny is chosen you must enter in a comment

NOTE: Any comments included with the approval will appear on the evaluation along with the electronic signature. These comments can be seen by anyone who has access to view the evaluation including the employee. If the evaluation is denied, the comments remain on the evaluation until approved. As a reminder, the employee will not have access to that information until the manager signs the evaluation.



TIP! If you need to make any changes to the evaluation you've submitted for your direct report, deny the evaluation to re-open the rating task. Once the evaluation is re-submitted with the added edits, all approvals and signatures will be re-triggered.

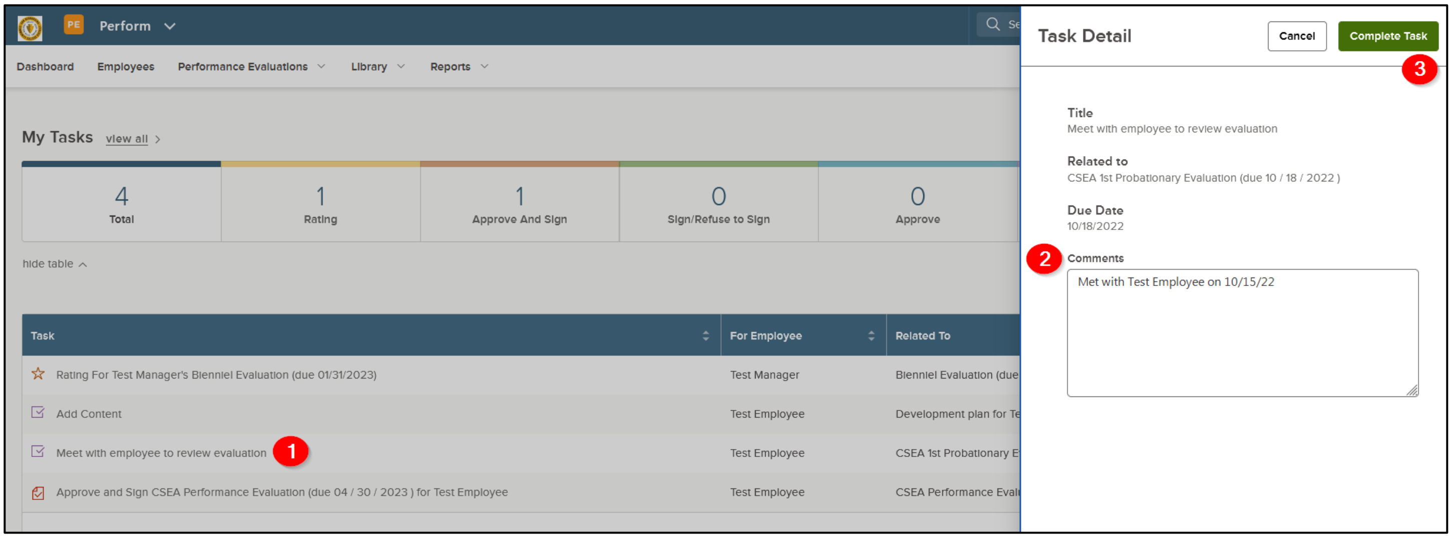
If you select **approve & sign**, a fly-out will appear. Enter any desired comments, sign, and submit.

Once submitted, a green success banner will appear and you will be re-directed to the evaluation page.

SECTION 7 – MEET WITH DIRECT REPORT TO REVIEW EVALUATION

After the manager has approved & signed off on the evaluation, the manager will receive a task to **Meet with employee to review evaluation.**

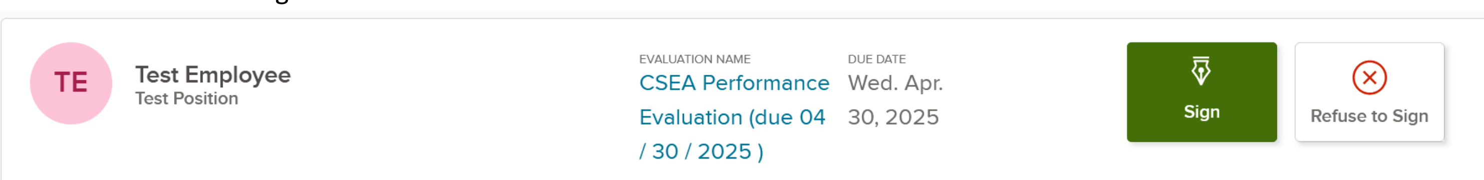
To complete a task, navigate back to the **My Tasks** section of your Evaluation Dashboard. To navigate to your dashboard from any other page in Perform, select **the SBCCD logo** in the top left corner. Here, you see any current or overdue tasks that require your action.



1. Click into the corresponding **Task Name** from the list
    - In this example, Test Manager must complete a manual task. They must meet with their direct report to discuss and review the employee's first probationary evaluation.
2. A fly-out appears with the task details
    - Enter any **comments** as necessary (i.e. Met with employee on xx/xx/xx date)
3. When you have completed the task, select **Complete Task**
    - You receive a green banner once the step has been completed

Final Signature

Once the evaluation has been delivered, a task is assigned to the direct report to sign the evaluation. The direct report will only have the option to sign the evaluation – they cannot deny it. However, they do have the opportunity to add comments or refuse signature at this time.



After this final signature, the evaluation form will automatically be routed to Human Resources to be filed in the personnel file.

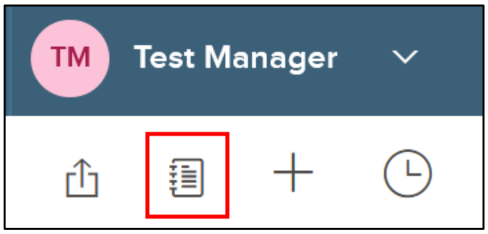
SECTION 8 – JOURNAL ENTRIES

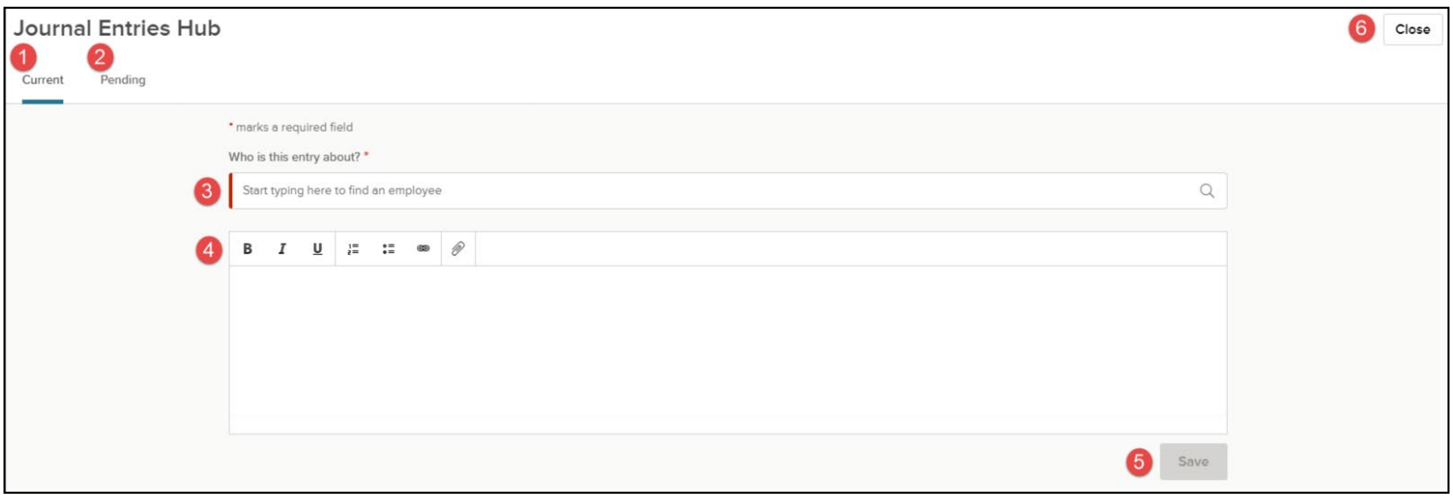
Navigating to Journal Entries

There are several ways to log Journal Entries in Perform. They can be created from the Journal Hub, from the Dashboard, and from the Talent Profile. They can even be emailed directly to Perform!

Adding Journal Entries via the Journal Hub

All managers have access to their **Journal Hub**. The Journal Hub is a central location where you can find all Journal Entries that you have created or have access to (those shared with you). The Journal Hub icon is always accessible to the user, no matter what page they are viewing in Perform.





Select the Journal Hub icon and a fly-out displays the **Journal Entries Hub**.

1. **Current:** Journal Entries successfully posted are found in the Current tab
2. **Pending:** Journal Entries unsuccessfully posted can be found and corrected in the Pending tab
   - Once corrected, the Journal Entry is posted to the Current tab
3. **Who is this entry about?:** Search for any employee to create a Journal Entry for, including yourself or any direct reports. Once someone is selected, any posted Journal Entries that you have access to displays at the bottom of the hub
4. **Body of Journal Entry:** Utilize the rich text editor when entering the text of your Journal Entry
   - *One attachment* can be included (5MB)
5. **Save:** Select Save to post the Journal Entry
6. **Close:** Select Close at any time to close the fly-out and return to the previous page. Any unsaved Journal Entries are lost

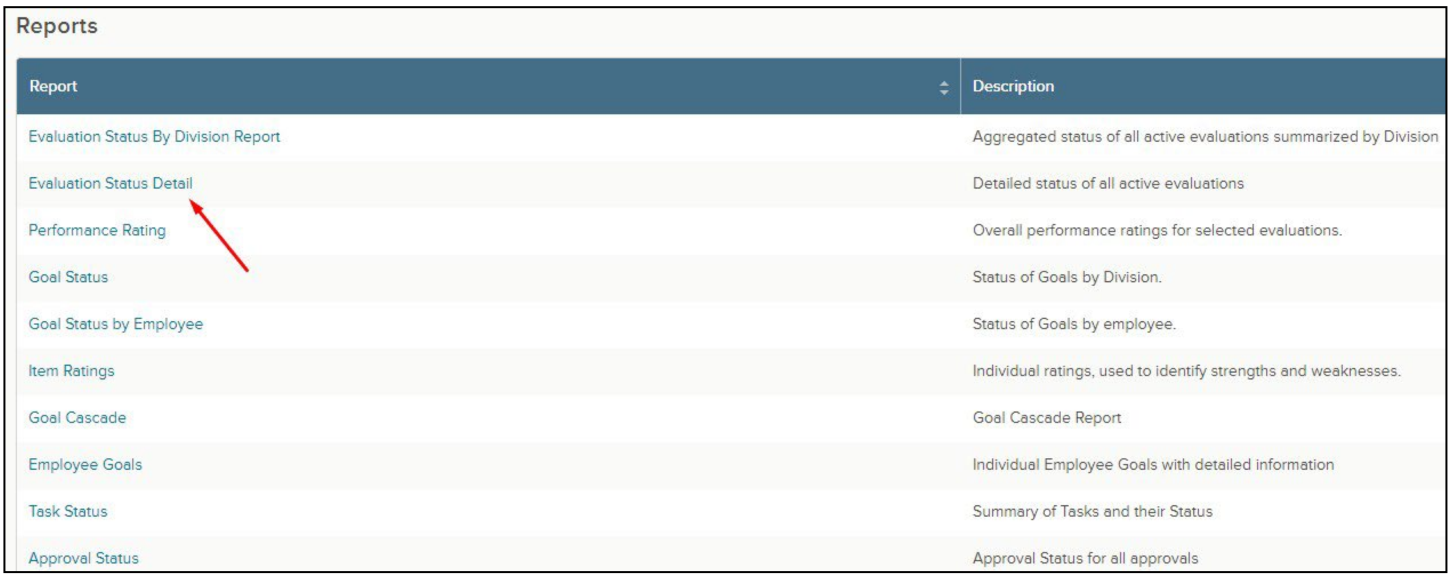
SECTION 9 – REPORTS

Managers have the ability to run reports on employees within their managerial hierarchy.

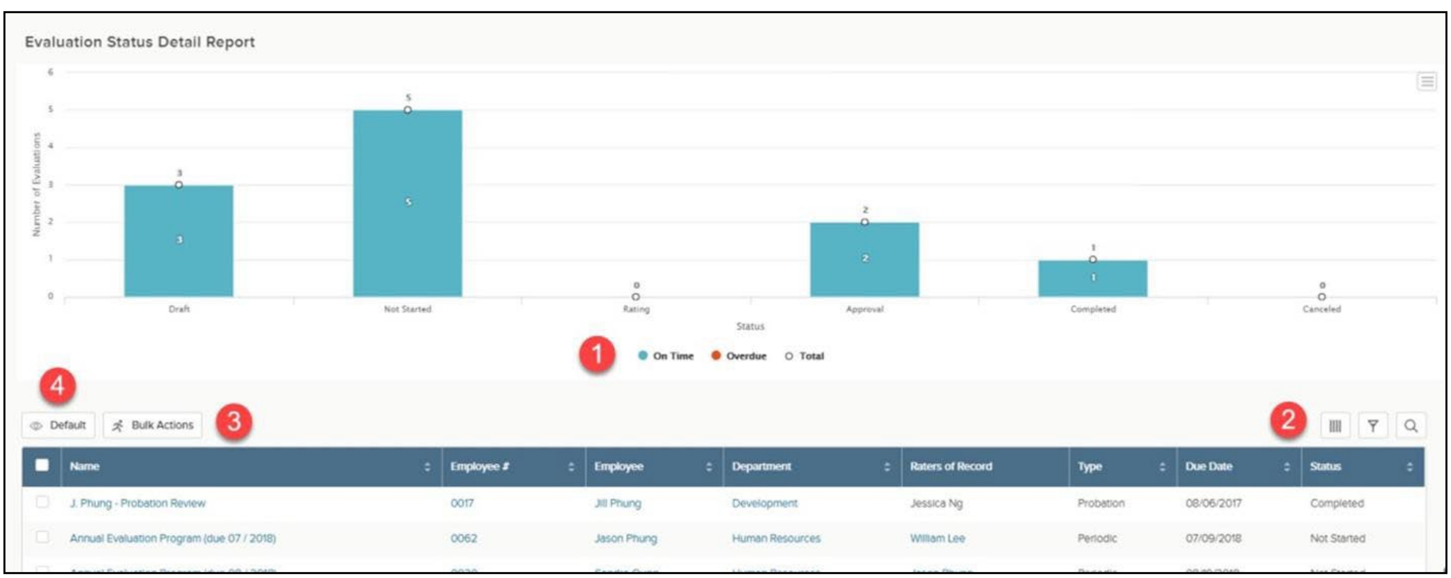
Navigating to Reports

On your dashboard menu, you see the **Reports** header. Hover over the menu and select **Reports**.

You are now in the Reports page. A list of all pre-defined reports will appear:



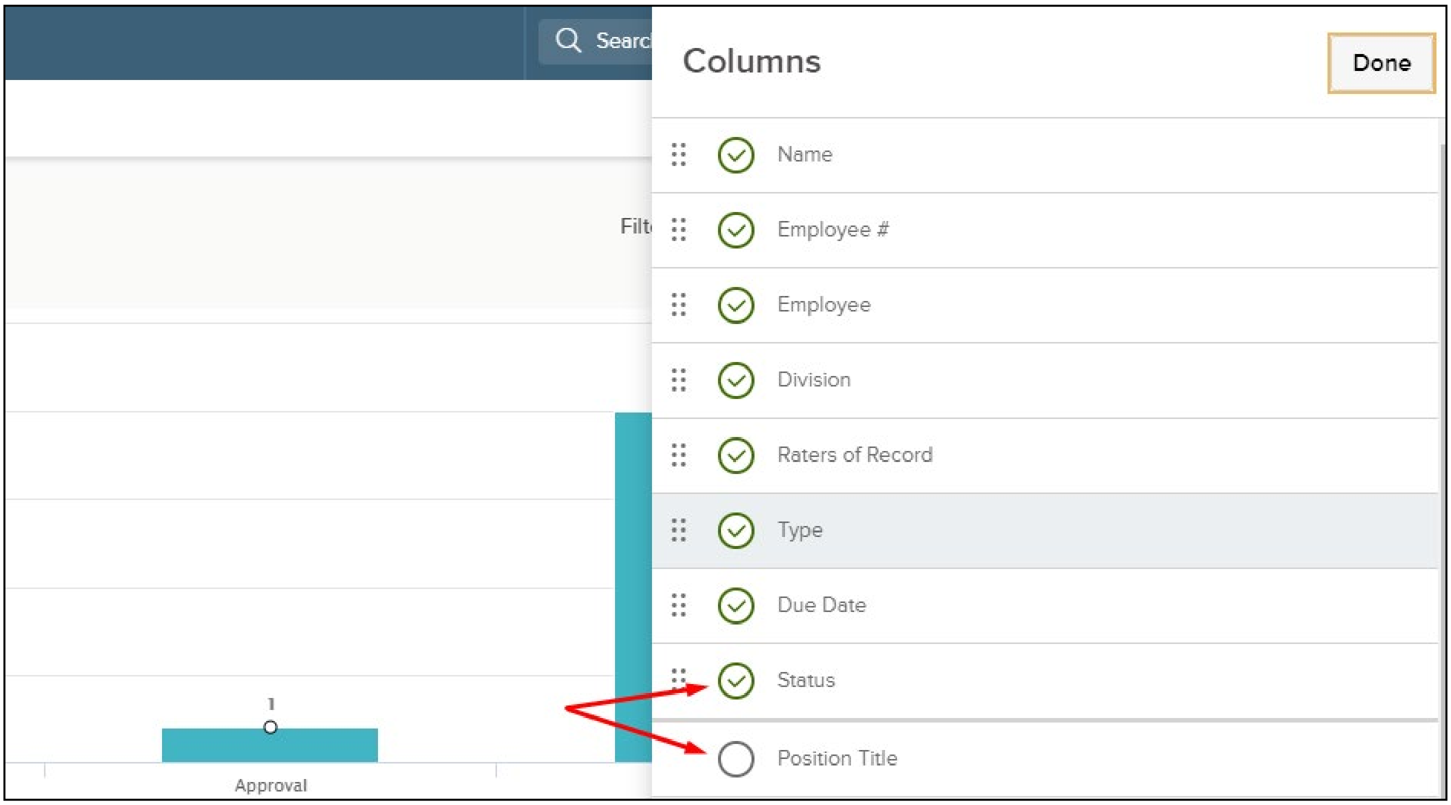
To run a report, click the report name. In this example, we use the **Evaluation Status Detail** report.



1. Upon selecting any part of the graph, the list directly below will filter to reflect the corresponding information.
2. Add **Columns** , **Filter** on any item, or **Search** any column
3. To export the grid, select the desired records by checking the box and then select **Bulk Actions**
   - You can export the grid in a CSV, PDF, or Excel file
4. To save a customized view, select **Default**

To customize the report, start by selecting the Column icon

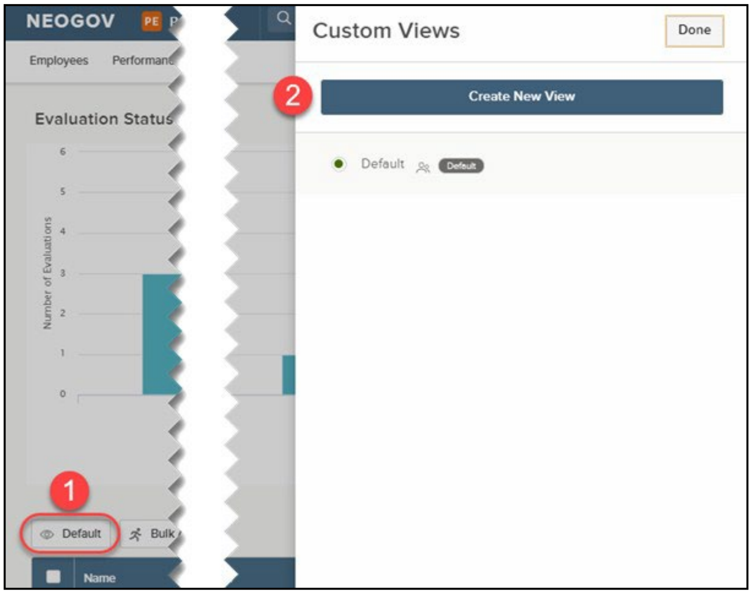
A fly-out will appear with all the fields that can be added to the report. Select the circle to add to the list, or select a checkmark to remove. Use the icon to rearrange fields. Once you have configured your columns, select **done.**

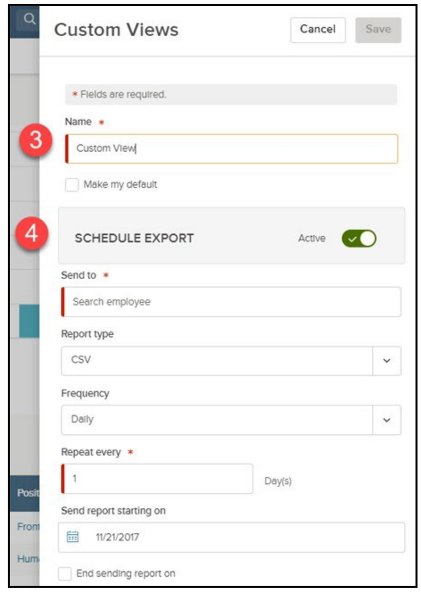


Schedule Reports

If you need to export this report often, you can use the **Schedule Export** feature. By using this feature, the system automatically exports the report and emails you per your configuration.

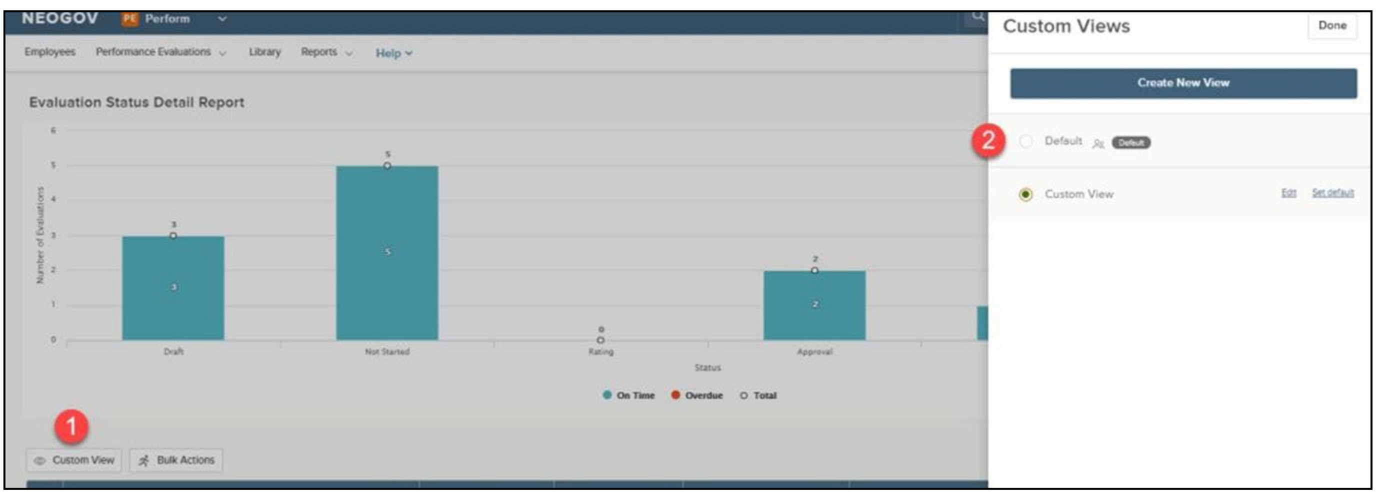
The Schedule Export feature is available on the Evaluation Status Detail, Performance Rating, Tasks Status, Item Ratings, and the Evaluation Status by Department Report





1. Once you have customized and configured your report to your liking, select **Default**
2. A fly-out appears. Select **Create New View**
3. Next, **Name** the custom view
4. Enable **Schedule Report** by selecting the toggle
5. Enter in all the appropriate and required information:
    - Which **employee** to send the report to
    - The **report type** (CSV, Excel, PDF)
    - The **frequency** for the system to generate the reports
        - How often you would like it to **Repeat**
    - Define the **start** and **ending** date of the report

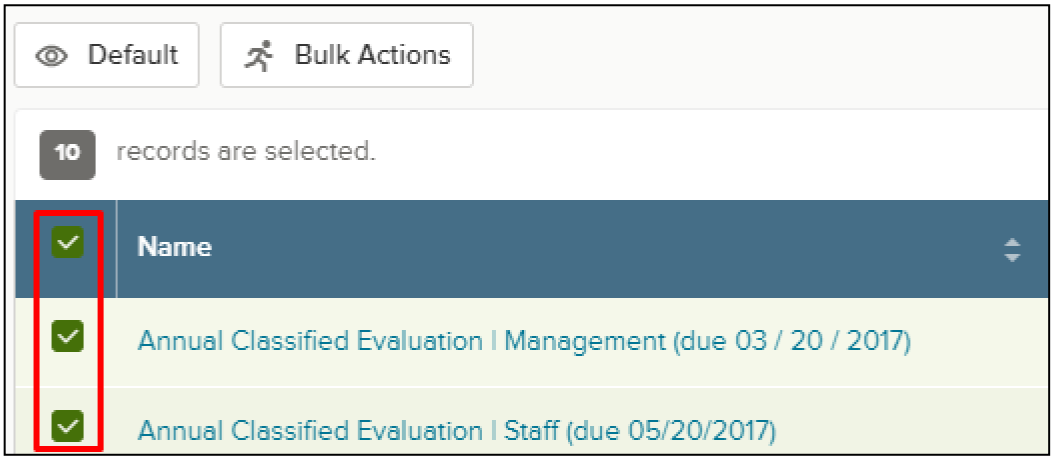
Select **Save** when all configuration is complete. The **default** title has now changed to your custom name.



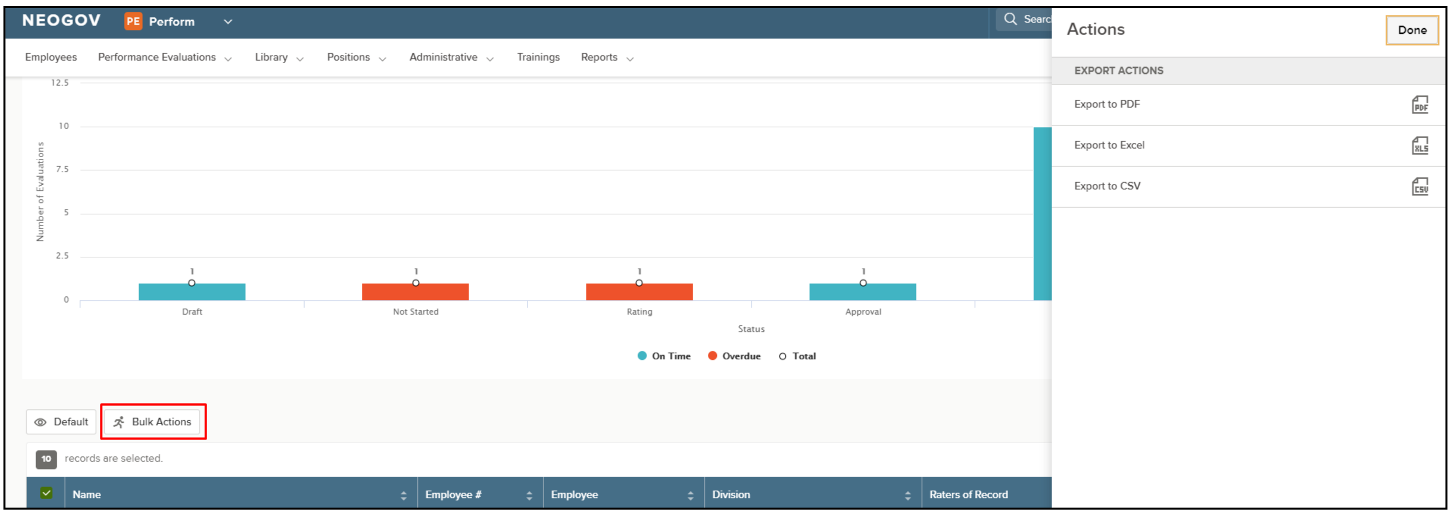
1. Select the custom view name predefined in the previous steps
2. Select **Default** and save

Exporting Reports

To export the details, check the individual records you wish to export, or select all records:



Select the **Bulk Actions** button and a fly-out will appear with the different exporting options, i.e. **Export to PDF**, **Export to Excel**, or **Export to CSV**:



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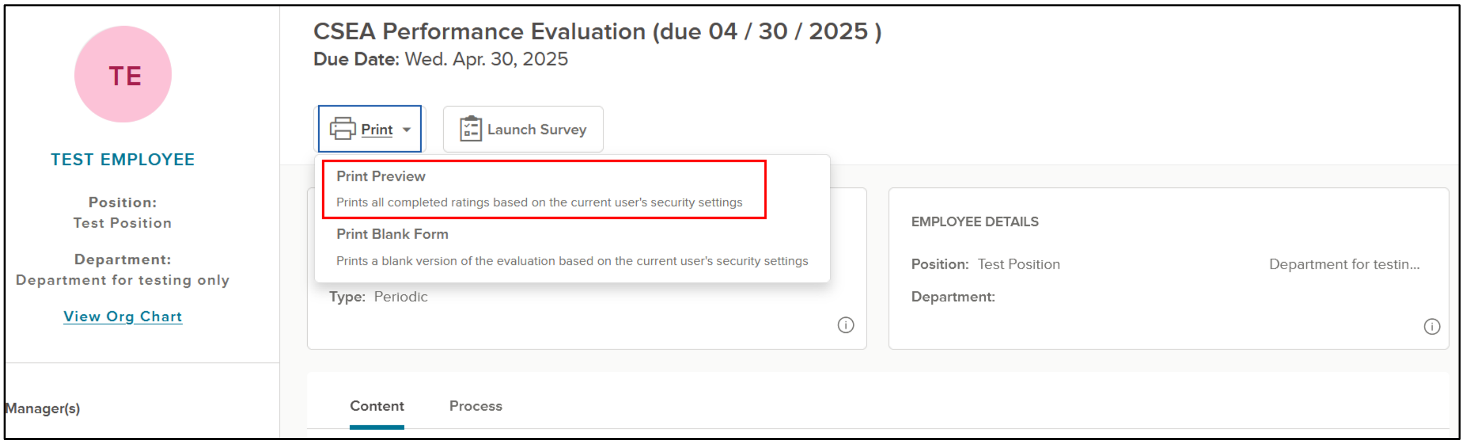
SECTION 10 – PRINTING EVALUATION FORMS

Print Your Evaluation

To print your own completed evaluations, find **My Evaluation** on your evaluation dashboard. Select one of the evaluations shown or select **view all of my evaluations** to see a complete list.

Select the title of the evaluation you'd like to print. From the evaluation details page, select **print preview**.



Select your preferred settings on the right and then select **print** in the top right.

SECTION 11 – BEST PRACTICES

Below are some useful tips to follow as managers complete evaluations in NEOED Perform.

Before the Evaluation

New Employees

- Verify that new employees can access Perform. All new hires should be assigned a login upon hire. If they cannot access the system for some reason, contact Melanie Gonzales in Human Resources for assistance.
- Use your Outlook calendar to schedule a 2-month and 4-month probationary evaluations prior to the due date.
- Show new employees how to use the journal entry feature. Reference the training manual provided.

Current Employees

- Verify that new employees can access Perform. Current employees may still need to activate their account. If they cannot access the system for some reason, contact Melanie Gonzales in Human Resources for assistance.
- Maintain journal entries and encourage employees to journal relevant information throughout the year.

During the Evaluation

- Enter as much detail as possible, including dates and occurrences of any events referenced.
- Review an evaluation prior to submission by printing from the rating form. Further instruction can be found in Section 5: Print Current State.
- Contact Human Resources if an evaluation needs to be modified after it has been approved.
- Once the ratings have been submitted, contact the employee to set up a review date. Once evaluation meeting has concluded, you must acknowledge the task "Meet with employee to review evaluation" in NEOED before the manager can sign off on the evaluation.
- The evaluation is considered complete when the employee submits their signature or refusal along with final comments, if any.

SECTION 12 – TIPS & TRICKS

Troubleshooting Browsers

All users are highly encouraged to use one of three supported browsers:

- Chrome
- Internet Explorer 11 or higher
- Microsoft Edge

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered will not likely be resolved.

If you encounter any issues, the first step in trying to resolve the issue would be to clear the browser's *cookies and cache.* To do so, select:

- Ctrl + Shift + Delete

This simple fix solves most user issues. If this does not fix the issue, try using a different supported browser.

If you are still encountering the issue, please take any relevant screen shots of the issue, such as an error message, and send this to Melanie Gonzales at mgonzales@sbccd.edu. Include as much information as possible.

Resetting Your Password

When logging in to NEOED, there is a Forget Password and Forget Username link. Select the correct link and follow the directions.

If you want to change your password, you can click the drop-down list associated with your name in the upper right-hand corner > Account Settings and enter the new password. The original password must be input first before changing.

Please note that your account must be activated in order to reset your password. If your account has not been activated, please contact Melanie Gonzales at mgonzales@sbccd.edu.