

NEOED Perform Management Evaluation Training Guide

TABLE OF CONTENTS

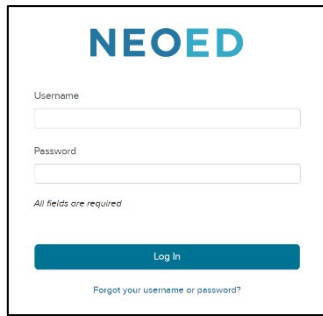
Contents

SECTION 1 - LOGIN.....	4
SECTION 2 – MANAGEMENT EVALUATION PROCESS	5
SECTION 3 - NAVIGATING THE DASHBOARD.....	6
Evaluation Dashboard	6
In-App Help.....	7
Using In-App Guidance	7
My Tasks.....	8
My Evaluations	9
My Direct Reports.....	9
Active Evaluations and Overdue Tasks	9
Journal Hub.....	11
My Profile	11
Performance Evaluations List	11
SECTION 4 – ADDING GOALS/OBJECTIVES	13
Add/Edit Content – Objective Status Report	13
SECTION 5 – RATING AN EVALUATION	15
Rating Form – Self-Evaluation (Direct Report)	15
Rating Form – Self-Evaluation (Manager)	16
Rating Form – Competencies.....	17
Rating Form – Overall Rating.....	17
Rating Form – Print Current State.....	18
Rating Form – Submit Evaluation	18
SECTION 6 – APPROVING & SIGNING AN EVALUATION	19
Navigating the Approval Page.....	19
SECTION 7 – MEET WITH DIRECT REPORT TO REVIEW EVALUATION	21
Final Signature	21
SECTION 8 – JOURNAL ENTRIES	22
Navigating to Journal Entries.....	22
Adding Journal Entries via the Journal Hub	22
SECTION 9 – REPORTS.....	23

Navigating to Reports	23
Schedule Reports.....	24
Exporting Reports	25
SECTION 10 – PRINTING EVALUATION FORMS	27
Print Your Evaluation	27
SECTION 11 – BEST PRACTICES.....	28
Before the Evaluation	28
New Employees	28
Current Employees	28
During the Evaluation	28
SECTION 12 – TIPS & TRICKS.....	29
Troubleshooting Browsers	29
Resetting Your Password	29

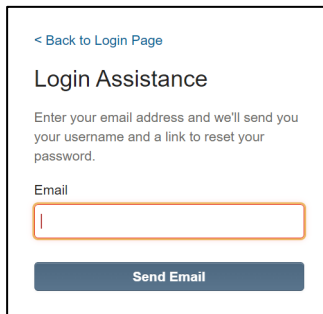
SECTION 1 - LOGIN

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



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

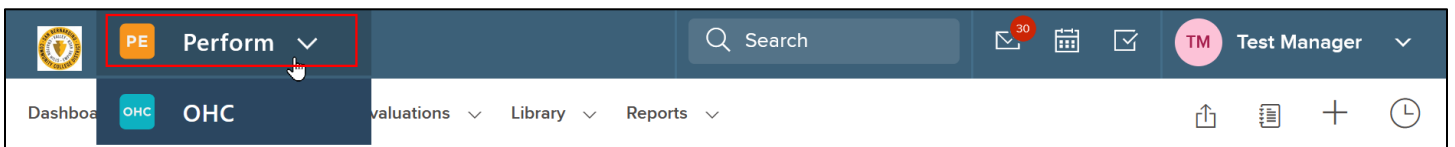
Your username should match your district assigned email but your password will be whatever you last set it as. Username format is <username>@sbccd.cc.ca.us (jdoe@sbccd.cc.ca.us)



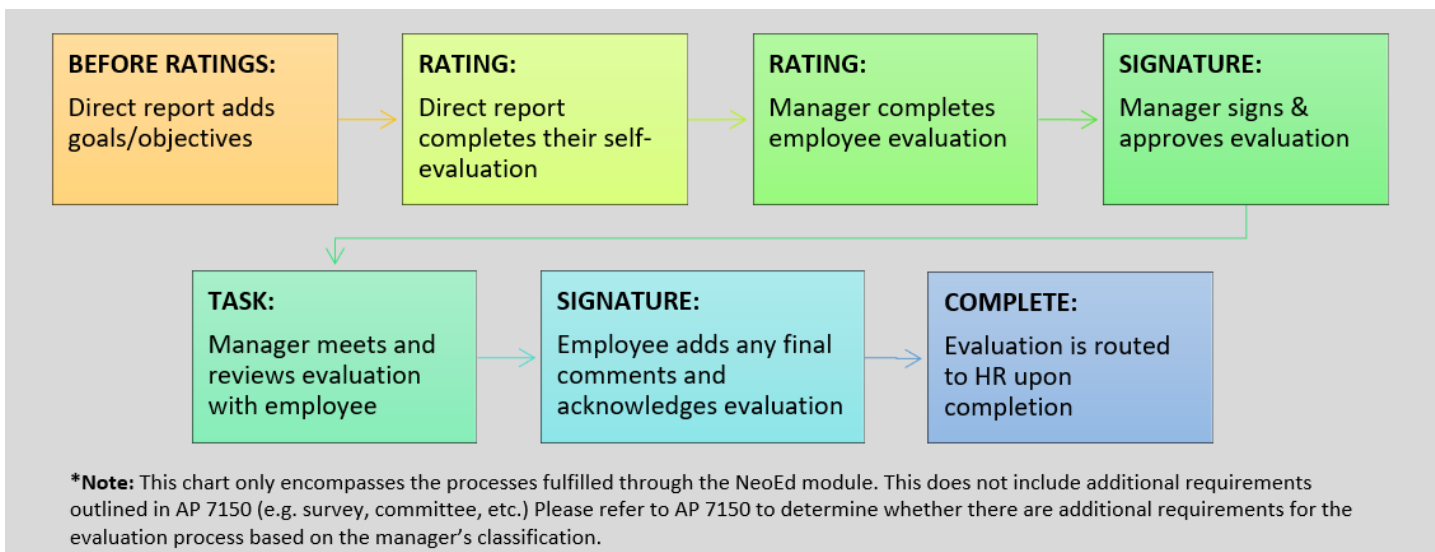
If you do not know or forget your username or password, click the “**Forgot your password?**” link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.

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





BEFORE RATINGS

-  Add goals/objectives to your evaluation
Employee


RATINGS

-  Self-Rating
Employee
-  Rating
Manager

AFTER RATINGS

-  Meet with employee to review evaluation
Manager
-  Approval & Signature
Manager

Release evaluation to employee

-  Signature
Employee

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

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

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.

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.

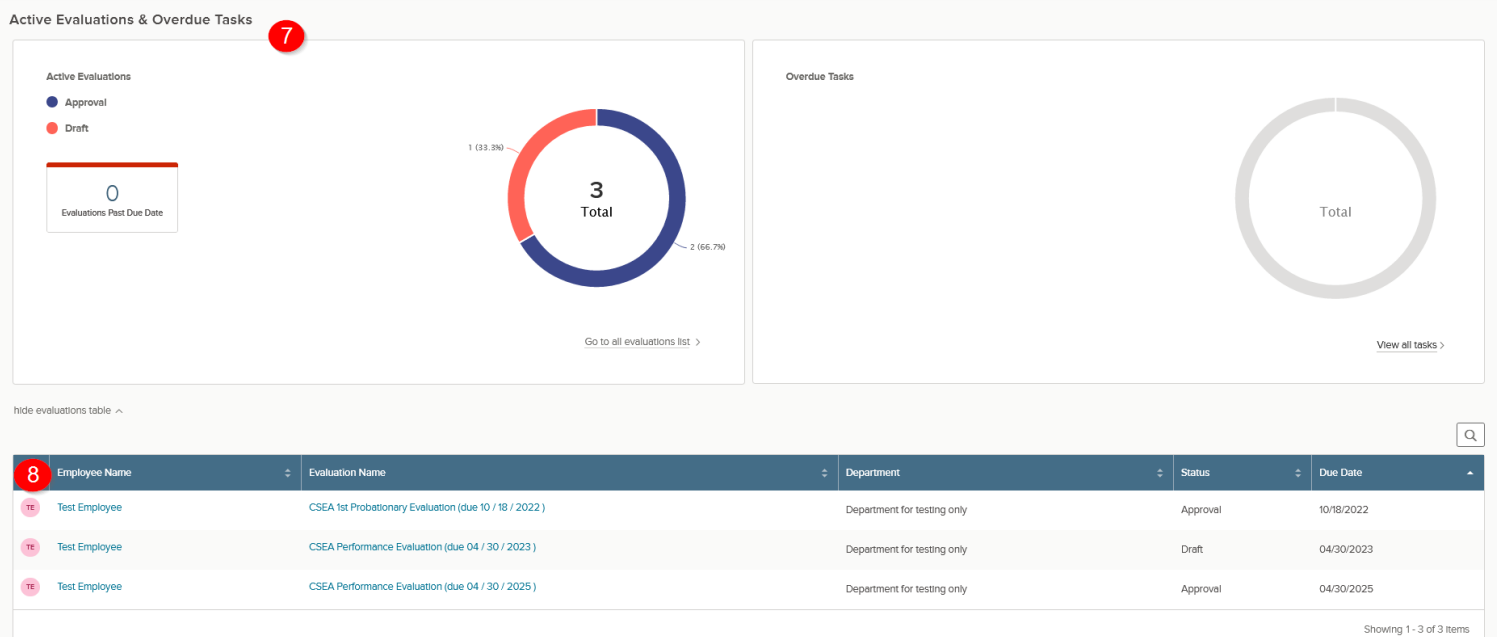
SECTION 3 - NAVIGATING THE DASHBOARD

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.

The screenshot shows the Perform dashboard interface. At the top, there is a navigation bar with tabs for Dashboard, Employees, Performance Evaluations, Library, and Reports (1). A search bar and user profile (6) are also visible. Below the navigation bar is the 'My Tasks' section (2), which features a horizontal bar with colored boxes representing different task categories: Total (4), Rating (1), Approve And Sign (1), Sign/Refuse to Sign (0), Approve (0), Other (2), and Overdue (2). Below this bar is a table of tasks with columns for Task, For Employee, Related To, and Due Date. The tasks listed include 'Rating For Test Manager's Biennial Evaluation', 'Add Content', 'Meet with employee to review evaluation', and 'Approve and Sign CSEA Performance Evaluation'. Below the table is the 'My Evaluations' section (3), which displays a card for a 'Biennial Evaluation' with details like due date and status. At the bottom is the 'My Direct Reports' section (4), showing cards for 'John Doe' and 'Test Employee', each with '0 Overdue' and 'Write Journal' buttons. A 'Journal Hub' icon (5) is located in the top right corner of the dashboard area.

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.

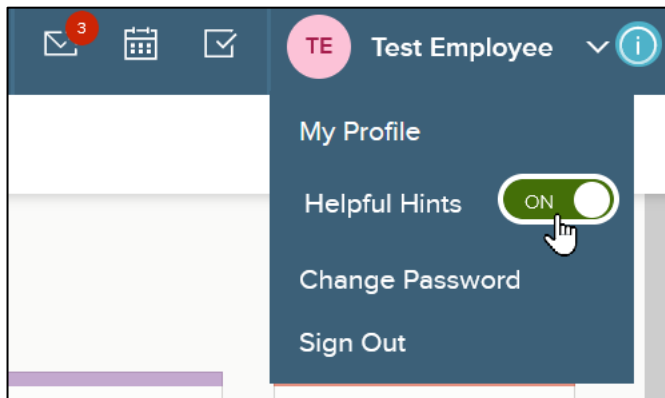


7. **Active Evaluations and Overdue Tasks:** Graphs that display all active and overdue evaluations and evaluation tasks for both your direct reports and yourself
8. **Active Evaluation and Overdue Tasks List:** Updates to reflect the corresponding information selected on the graphs above

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.

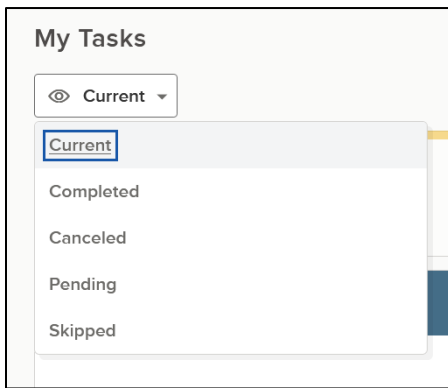
To turn off the Helpful Hints, toggle the switch back to **OFF**.

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.

Task	For Employee	Related To	Due Date
★ Rating For Libby Te's L. Te - Probation Review	Libby Te	L. Te - Probation Review	07/18/2017
☑ Check in with Ziggy	William Lee	N/A	11/14/2017
☑ Review, Add end/or Edit Goals	Jason Phung	Annual Evaluation Program (due 07 / 2018)	11/25/2017
☑ Answer check-in question	Jason Phung	Annual Evaluation Program (due 07 / 2018)	12/04/2017

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.

My Evaluations [view all of my evaluations >](#)

Biennial Confidential Evaluation (due 04 / 21...)
Due: **Sat, Apr 21, 2018**
Status: **Not Started**

Biennial Confidential Evaluation (due 04 / 21...)
Due: **Fri, Jul 28, 2017**
Status: **Completed**

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.

My Direct Reports

JD John Doe
Test Position
0 Overdue
Write Journal

TE Test Employee
Test Position
0 Overdue
Write Journal

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**:

Active Evaluations & Overdue Tasks

Active Evaluations

- Approval: 1 (12.5%)
- Rating: 1 (12.5%)
- Not Started: 2 (25.0%)
- Draft: 4 (50.0%)

3 Evaluations Past Due Date

8 TOTAL

Go to all evaluations list >

Overdue Tasks

- Sign: 1 (100.0%)

1 TOTAL

View all tasks >

hide evaluations table: ^

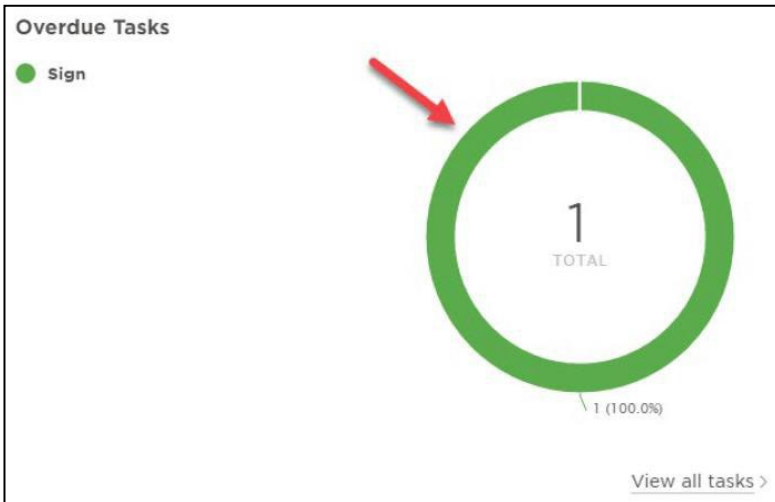
Employee Name	Evaluation Name	Department	Status	Due Date
Jasmine Cho	2016 Review	Customer Support	Draft	10/25/2016
Ryan Horne	2016 Performance Review	Sales	Not Started	10/25/2016
Mike Shin	2016 Performance Review	Sales	Approval	10/25/2016

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:

Overdue Sign Tasks for All Evaluations Done

Task Name	Task Assignee	Evaluation Name	Due Date
Sign Annual Performance Appraisal for Jeff Gold	Jeff Gold	Annual Performance Appra...	11/17/2016

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

[hide evaluations table ^](#)

Employee Name	Evaluation Name	Department	Status	Due Date
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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**:

Employee Information		
EMAIL	EMPLOYEE NUMBER	ONLINE ACCESS
test.employee@sbccd.cc.ca.us	TestEmployee	Activated
HIRE DATE	POSITION START DATE	
-	09/16/2019	
POSITION TITLE	DEPARTMENT	DIVISION
Test Position	Department for testing only	
CLASS SPEC	DIRECT MANAGER	ADDITIONAL MANAGER(S)
-	Test Manager	-
ADDRESS	PHONE NUMBER	ACTIVE
-	-	Yes

Hierarchy

- MG Melanie Gonzales HUMAN RESOURCES ANALY...
- TM Test Manager Test Position
- TE You Test Position

[View Company](#)

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:

The screenshot shows the 'Evaluation List' interface. At the top, there are buttons for 'Evaluation List' and 'Bulk Actions'. Below these, a status bar indicates '13 records are selected.' and a red box highlights the 'Select all 13 records' button. The main table has columns for Name, Employee, Employee, Department, Raters, Type, Due Date, Status, and Actions. The table contains 13 rows of evaluation records, each with a green checkmark in the first column.

Name	Employee	Employee	Department	Raters	Type	Due Date	Status	Actions
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Probation	10/25/2016	Draft	
2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Not Started	
2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Approval	
2016 Review	1003	Alex Jones	Finance	Alex Jones	Periodic	10/26/2016	Not Started	
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/15/2016	Completed	
Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/21/2016	Completed	
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Periodic	02/01/2017	Completed	
Annual Annual Performance Appraisal ...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Periodic	07/03/2017	Not Started	

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:

The screenshot shows the 'Bulk Actions' fly-out menu. The menu is titled 'Actions' and has a 'Done' button. It is divided into two sections: 'EXPORT ACTIONS' and 'EVALUATION BULK ACTIONS'. The 'EXPORT ACTIONS' section includes 'Export to PDF', 'Export to Excel', and 'Export to CSV'. The 'EVALUATION BULK ACTIONS' section includes 'Assign Goals' and 'Print'. A red box highlights the 'Print' option.

Section	Action	Icon
EXPORT ACTIONS	Export to PDF	PDF
	Export to Excel	XLS
	Export to CSV	CSV
EVALUATION BULK ACTIONS	Assign Goals	Trophy
	Print	Printer

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 screenshot shows the 'My Tasks' dashboard. At the top, there are several summary cards: Total (1), Rating (0), Approve And Si... (0), Sign/Refuse to ... (0), Approve (0), Other (1), and Overdue (0). Below these is a table with columns: Task, For Employee, Related To, and Due Date. The first row in the table is 'Add goals/objectives to your evaluation' for 'Test Employee' related to '1st Year Management Evaluation (due 01/31/...)' with a due date of '09/20/2022'. This task is highlighted with a red box.

The link redirects to the Objectives – Status Report form.

Add/Edit Content – Objective Status Report

The screenshot shows the 'Add/Edit Content' form for 'Objectives - Status Report'. The form is divided into two main sections. The left section contains metadata: Task Due Date (Tue, Sep 20, 2022), Employee (Test Employee), Position (Test Position), Department (Department for testing only), Evaluation (1st Year Management Evaluation ...), and Evaluation Due Date (Tue, Jan 31, 2023). At the bottom of this section is a 'Submit Content' button with a red circle containing the number 3. The right section is titled 'Objectives - Status Report' and features a '+ Add Goals' button. A dropdown menu is open below this button, listing options: From Goal Library, From Position, From Class Specification, From Development Plan, From Last Scheduled Evaluation, and New Goal (highlighted with a red circle containing the number 1).

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:

Task	For Employee	Related To	Due Date
★ Rating For Test Manager's Biennial Evaluation (due 01/31/2023)	Test Manager	Biennial Evaluation (due 01/31/2023)	⚠ 07/17/2022

The link re-directs to the Rating Form.

Rating Form – Self-Evaluation (Direct Report)

1st Year Management Evaluation (due 01/31/2023)

GOAL SECTION | TEXT ONLY

Objectives - Status Report

1st Sample Goal
no comment

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:

My Tasks [view all >](#)

4 Total	1 Rating	1 Approve And Sign	0 Sign/Refuse to Sign	0 Approve	2 Other	2 Overdue
------------	-------------	-----------------------	--------------------------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For Test Manager's Biennial Evaluation (due 01/31/2023)	Test Manager	Biennial Evaluation (due 01/31/2023)	⚠ 07/17/2022

The link re-directs to the Rating Form.

Dashboard Employees Performance Evaluations Library Reports Help

Go to Evaluation Details **3** [Submit Evaluation](#)

Test Employee
TEST POSITION

Management Evaluation (due 01/31/2022)

SECTIONS **1**

- Self-Evaluation Form **2**
- Evaluator's Assessment
- Recommendations

NARRATIVE SECTION | TEXT ONLY

Self-Evaluation Form

Objective #1

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.

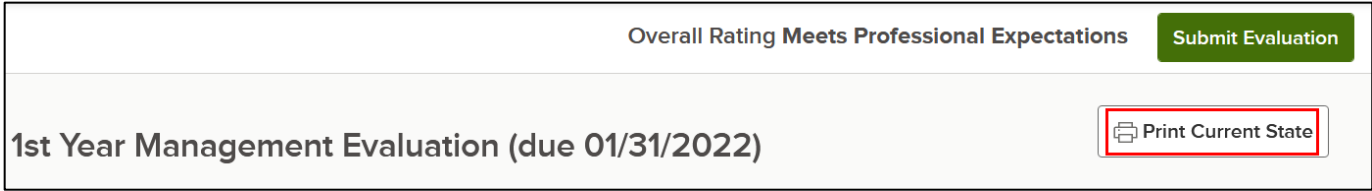
Rating Form – Overall Rating

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

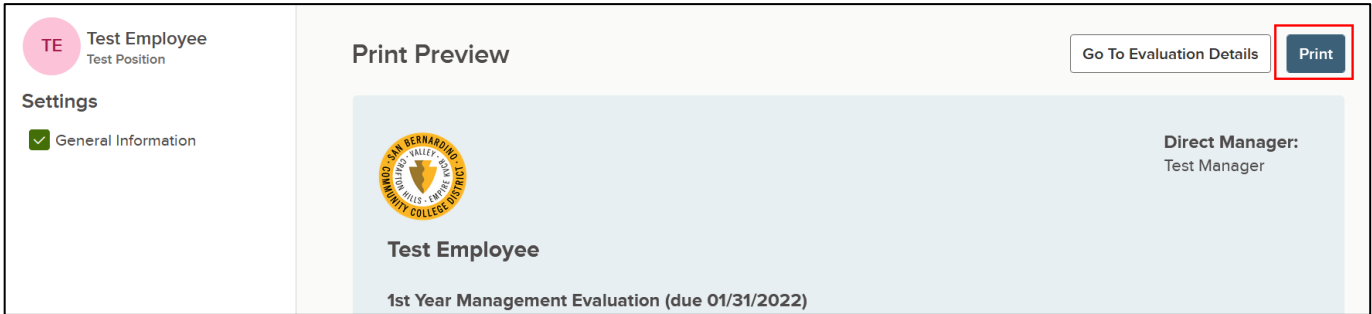
From the Summary section, select **Print Current State** for a printable version of the evaluation:



Overall Rating Meets Professional Expectations **Submit Evaluation**

1st Year Management Evaluation (due 01/31/2022) **Print Current State**

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



TE Test Employee
Test Position

Settings

General Information

Print Preview

Go To Evaluation Details **Print**

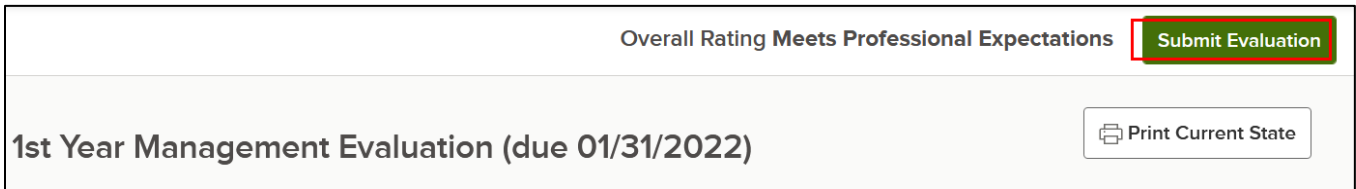
Direct Manager:
Test Manager

Test Employee

1st Year Management Evaluation (due 01/31/2022)

Rating Form – Submit Evaluation

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



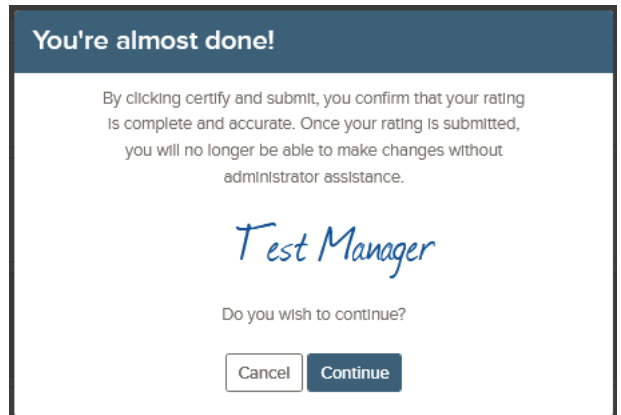
Overall Rating Meets Professional Expectations **Submit Evaluation**

1st Year Management Evaluation (due 01/31/2022) **Print Current State**

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**.



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 without administrator assistance.

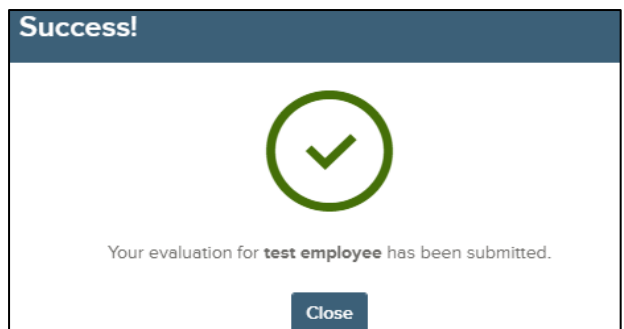
Test Manager

Do you wish to continue?


Cancel **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.



Success!



Your evaluation for **test employee** has been submitted.

Close

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.

The screenshot shows the 'My Tasks' dashboard. At the top, there are several summary cards: Total (4), Rating (1), Approve And Sign (1), Sign/Refuse to Sign (0), Approve (0), Other (2), and Overdue (2). Below these is a table with columns: Task, For Employee, Related To, and Due Date. A red box highlights the first row: 'Approve and Sign CSEA Performance Evaluation (due 04 / 30 / 2025) for Test Employee', 'Test Employee', 'CSEA Performance Evaluation (due 04 / 30 / 2025)', and '04/20/2025'.

Navigating the Approval Page

The screenshot shows the 'Approval Form' for a 'Test Employee' evaluation. The evaluation name is 'CSEA Performance Evaluation (due 04 / 30 / 2025)' and the due date is 'Wed. Apr. 30, 2025'. There are two buttons: 'Approve & Sign' (green) and 'Deny' (white with a red X). A red circle with the number '2' is next to the 'Approve & Sign' button, and a red circle with the number '3' is next to the 'Deny' button. Below the buttons is a 'Rating Summary' section for 'Test Manager' and a 'Measures of Performance' section with a 'Job Knowledge' competency.

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.

The screenshot displays the 'Perform' system interface. The top navigation bar includes 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', and 'Reports'. The 'My Tasks' section shows a summary bar with 4 Total, 1 Rating, 1 Approve And Sign, 0 Sign/Refuse to Sign, and 0 Approve. Below this is a table of tasks. The task 'Meet with employee to review evaluation' is highlighted and marked with a red '1'. The 'Task Detail' panel on the right shows the task title, related to 'CSEA 1st Probationary Evaluation (due 10 / 18 / 2022)', due date '10/18/2022', and a comments box containing 'Met with Test Employee on 10/15/22' marked with a red '2'. A 'Complete Task' button is marked with a red '3'.

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.

The screenshot displays the final signature interface. It shows a pink circle with 'TE' for 'Test Employee' and 'Test Position'. The evaluation name is 'CSEA Performance Evaluation (due 04 / 30 / 2025)' and the due date is 'Wed. Apr. 30, 2025'. There are two buttons: a green 'Sign' button and a white 'Refuse to Sign' button with a red 'X'.

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

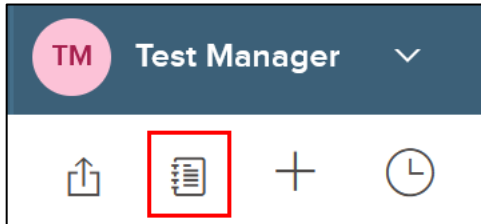
SECTION 8 – JOURNAL ENTRIES

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**.

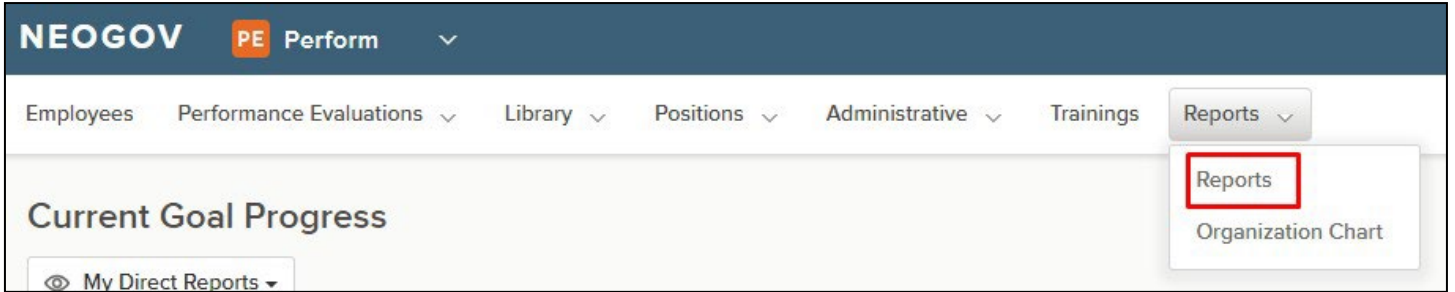
1. **Current:** Journal Entries successfully posted are found in the Current tab
2. **Pending:** Journal Entries unsuccessfully posted can be found and corrected in the Pending tab
 - Once corrected, the Journal Entry is posted to the Current tab
3. **Who is this entry about?:** Search for any employee 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:


Report	Description
Evaluation Status By Division Report	Aggregated status of all active evaluations summarized by Division
Evaluation Status Detail	Detailed status of all active evaluations
Performance Rating	Overall performance ratings for selected evaluations.
Goal Status	Status of Goals by Division.
Goal Status by Employee	Status of Goals by employee.
Item Ratings	Individual ratings, used to identify strengths and weaknesses.
Goal Cascade	Goal Cascade Report
Employee Goals	Individual Employee Goals with detailed information
Task Status	Summary of Tasks and their Status
Approval Status	Approval Status for all approvals

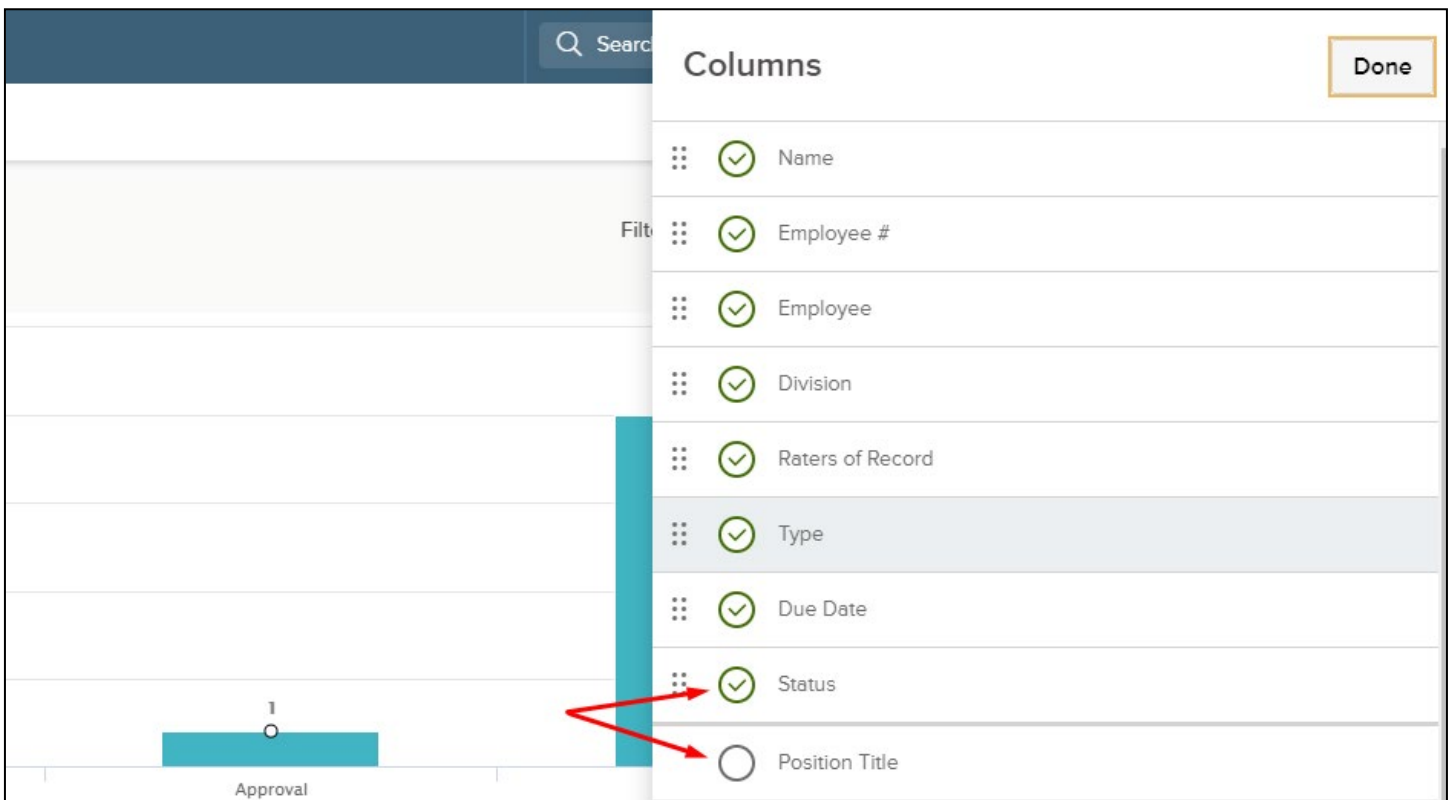
To run a report, click the report name. In this example, we use the **Evaluation Status Detail** report.



1. Upon selecting any part of the graph, the list directly below will filter to reflect the corresponding information.
2. Add **Columns** , **Filter** , 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 

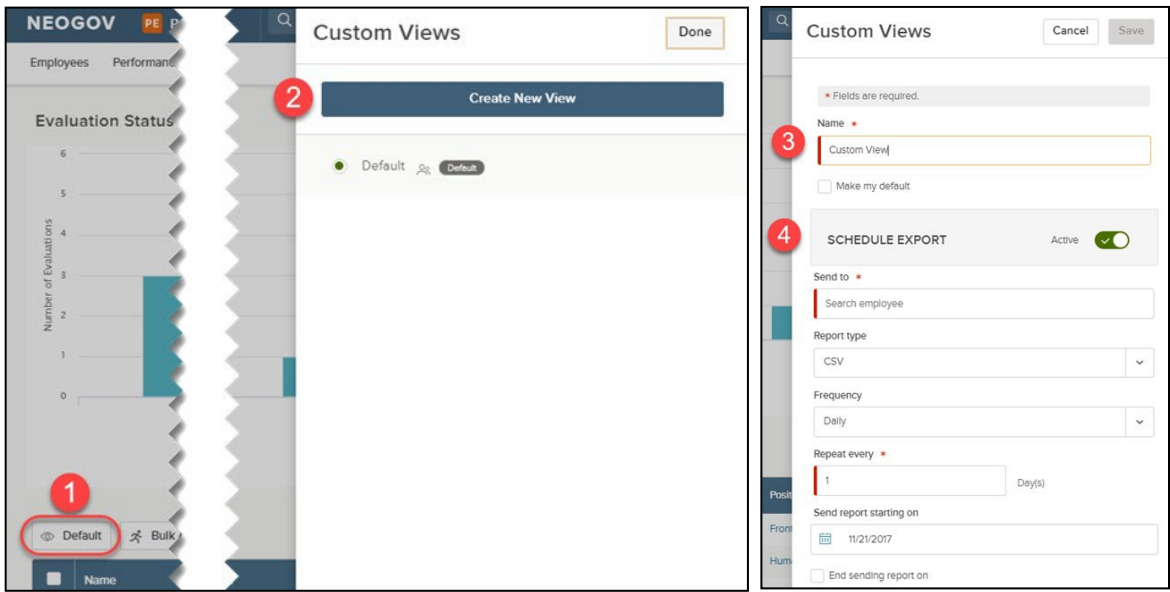
A fly-out will appear with all the fields that can be added to the report. Select the circle to add to the list, or select a checkmark to remove. Use the  icon to rearrange fields. Once you have configured your columns, select **done**.



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

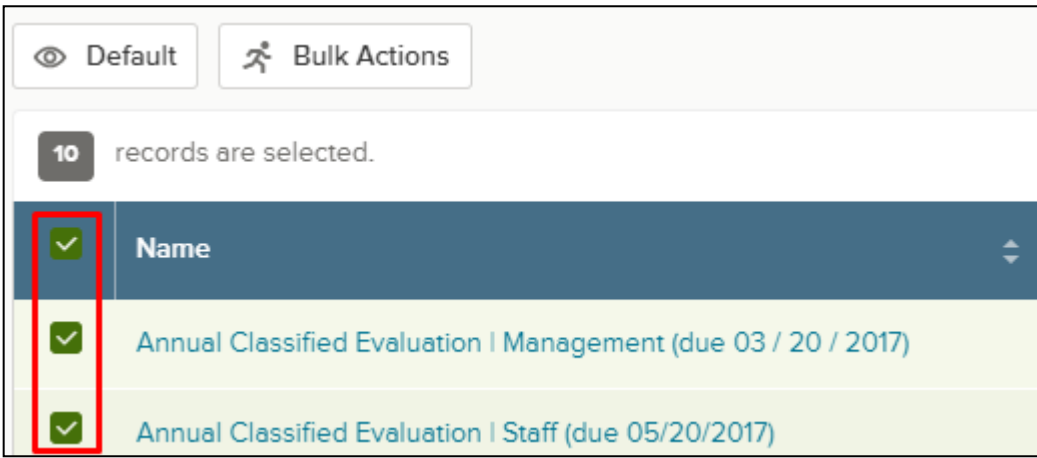
Select **Save** when all configuration is complete. The **default** title has now changed to your custom name.



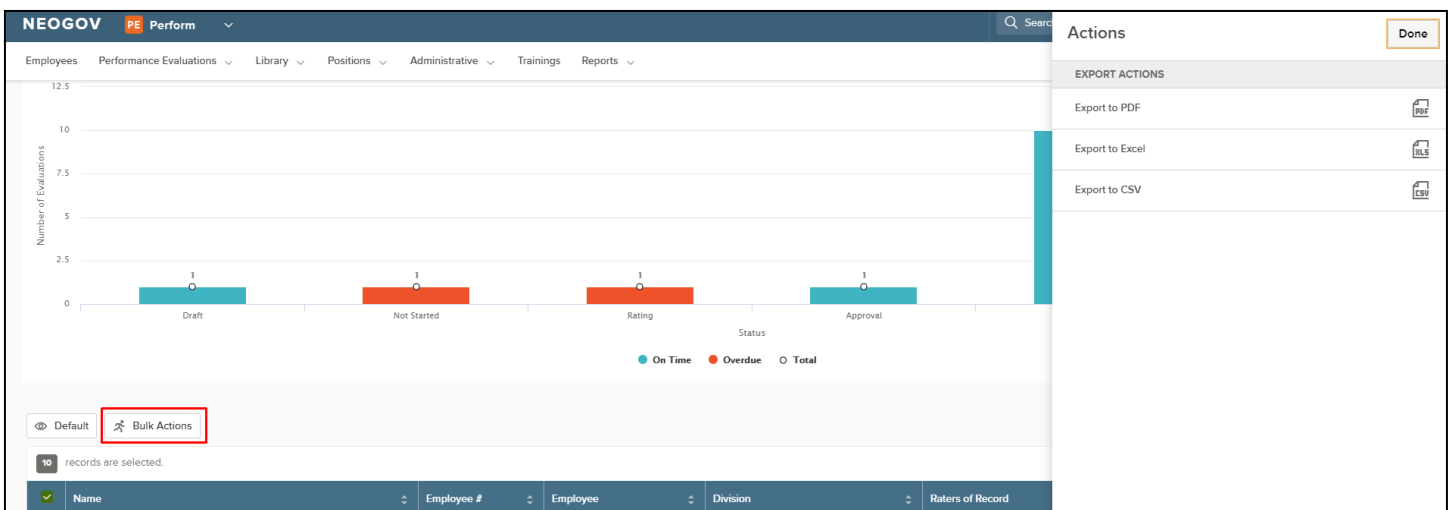
1. Select the custom view name predefined in the previous steps
2. Select **Default** and save

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**:



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.

My Evaluations [view all of my evaluations >](#)

Biennial Confidential Evaluation (due 04 / 21 / 2018)
Due: **Sat, Apr 21, 2018**
Status: **Not Started**

Biennial Confidential Evaluation (due 04 / 21 / 2016)
Due: **Fri, Jul 28, 2017**
Status: **Completed**

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

TE
TEST EMPLOYEE
Position: Test Position
Department: Department for testing only
[View Org Chart](#)

CSEA Performance Evaluation (due 04 / 30 / 2025)
Due Date: Wed, Apr 30, 2025

[Print](#) [Launch Survey](#)

Print Preview
Prints all completed ratings based on the current user's security settings

Print Blank Form
Prints a blank version of the evaluation based on the current user's security settings

Type: Periodic

EMPLOYEE DETAILS
Position: Test Position
Department: Department for testing only

Manager(s)

Content Process

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

TE Test Employee
Test Position

Settings

- General Information
- Raters
 - Test Manager
- Content
 - Measures of Performance
 - Employee Development
 - Overall Assessment
- Process

Print Preview [Go To Evaluation Details](#) [Print](#)

Direct Manager:
Test Manager

Test Employee
CSEA Performance Evaluation (due 04 / 30 / 2025)
Due Date: Wed, Apr 30, 2025

General Information

Position Test Position	Division Class Spec	Evaluation Type Periodic
Department Department for testing only		

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.