

FY 16/17 Training Document for Management Employees

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# NEOGOV Performance Evaluations

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# PART 1

## Introduction and Process Flow

# Introduction

**NOTE:** An employee must have an active email account and access to a computer to use the online system. You can request a new account by completing a SAR form. Contact the Help Desk to reset your email account.

## For FY 16'17

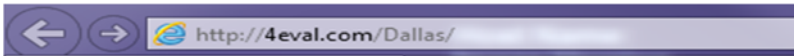
- Performance Plans will be created and tracked in NEOGOV for all employees except Operation and Field.
- For Operation and Field Employees, Performance Plans will be created and tracked using MS Word document. However, department directors can decide to use NEOGOV for Operations and Field employees if resources are available. The MS Word document is located on the Human Resources 4-Eval web site. Follow the instructions below to access the document or contact your HR Generalist for instructions on how to find the document.
- Follow the instructions in “PART 2” of this document to create performance plans for your employees.

## To access and use the NEOGOV process:

- Follow the steps below in **PART 2: How to Create a Performance Plan in NEOGOV**

## To access the MS Word document to use for Operation and Field Employees:

- In a browser search bar type <http://4eval.com/Dallas/>



- Click “Departments”
  6. [City of Dallas Process Flow](#)
    1. [Procedures](#) (including those required to be "documented")
    2. [Departments](#)

- In section “6.2 Departments” click “Human Resources”
  - [Human Resources](#)

- Click “Employee Relations” image



- Scroll to “HR-Employee Relations forms” [HR- Employee Relations Forms](#) and find and click [Performance Appraisal Operation & Field Employees \(560\)](#)

## Process Flow for FY 16/17

Initiate Performance Plan	
Event	Who
Add goals to your employees' evaluation plan	Appraiser
Activate your employees' evaluation plan	Appraiser
Review evaluation plan with employee	Management and Employee
Route for e-Signatures	Management
Track/Document/Communicate Progress	
Event	Who
Track and document progress and communicate progress as needed	Management and Employee
Provide Midyear Update	
Event	Who
Activate Midyear Review template for your employee(s)	Management
Add progress status and appropriate comments and review with appropriate level of management	Appraiser
Provide status update to employee	Appraiser
Route document for e-Signatures	Management and Employee
Continue to Track/Document/Communicate Progress	
Event	Who
Continue to track and document progress using the evaluation plan and communicate progress as needed	Management and Employee
Closeout with Year-end Review and Rating	
Event	Who
Closeout the evaluation plan at end of FY	HR, Management and Employees

## PART 2

# How to Create a Performance Plan in NEOGOV

## STEP 1: Log-in to NEOGOV

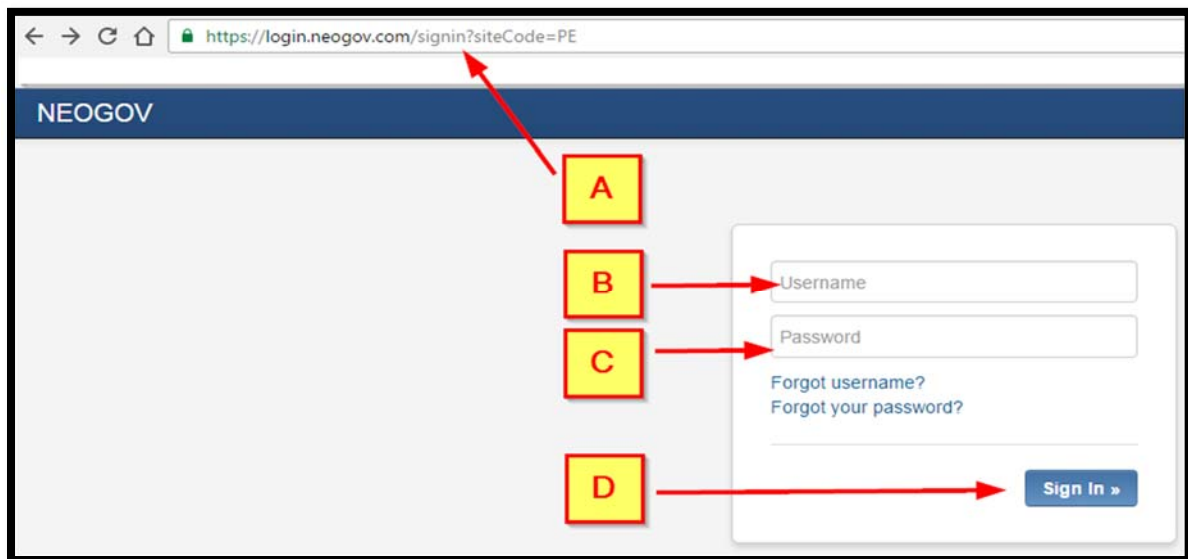
### User Account:

You should have received an email with your user account information. You must have an active email address to use the system. Send an email to [cityuniversity@dallascityhall.com](mailto:cityuniversity@dallascityhall.com) or contact your HR Generalist if you do not have a user account.

**NOTE:** Operation and Field employees will not have an active account if they don't have an email address and access to computer resources.

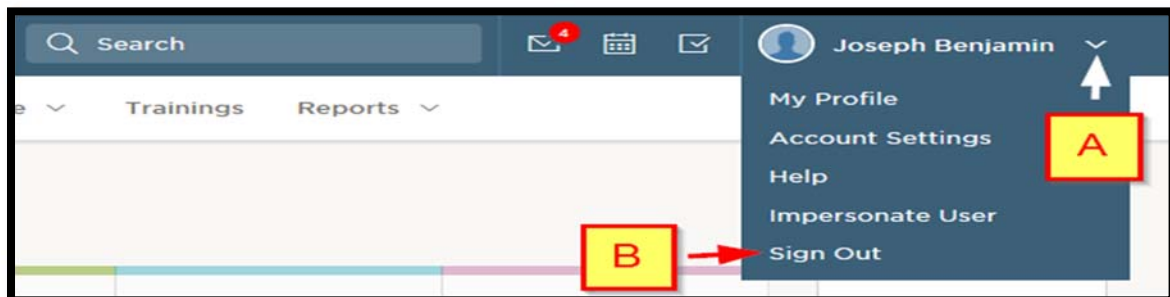
### How to log-in:

In a browser [A] type <https://performance.neogov.com> in the address bar, [B] enter your "Username", [C] enter your "Password" and [D] click "Sign in". SEE IMAGES BELOW.



### How to log-out:

On the menu bar [A] click down arrow next to your name and then [B] click "Sign Out". SEE THE IMAGE BELOW.



## STEP 2: Create and assign an Evaluation Plan

Evaluation Plans will be created and assigned to employees by Human Resources Department. Contact your HR Generalist if your employee(s) don't have an Evaluation Plan.

After an Evaluation Plan has been assigned to an employee, management will (1) add goals to each performance area, (2) activate the plan, (3) review the plan with the employee and (4) route the plan for e-Signatures.

Follow the instructions in this section "How to Create a Performance Plan in NEOGOV - STEPS 3 through 7" on the following pages.

STEP 03: Add goals to the Evaluation Plan

STEP 04: Activate the Evaluation Plan

STEP 05: Route for e-Signatures

STEP 06: Record and Track progress

STEP 07: Creating and Completing Tasks



## STEP 3: Add goals to individual employee at once

**NOTE: For goals to be added to an Evaluation Plan, the Evaluation Plan must be in Draft status. Contact your HR Generalist if the Evaluation Plan is not in Draft status.**

Management will add goals to Key Performance Areas for each employee. The chart shows Key Performance areas and applicable employee groups.

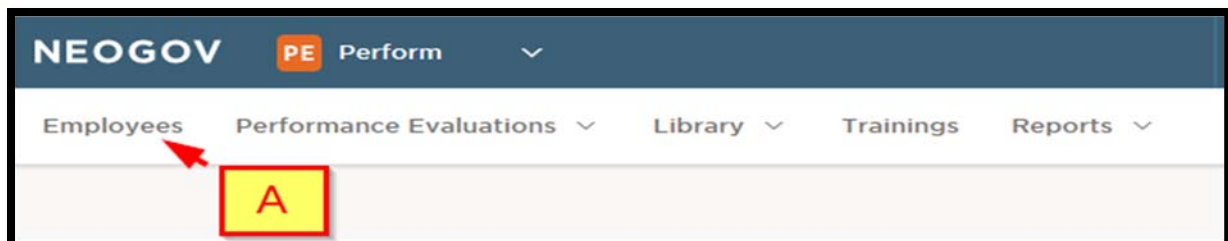
Key Performance Area	Applies to the follow employees
Customer Service	All employee groups
Integrity and Ethics	All employee groups
Accountability	All employee groups
Teamwork	All employees
Equipment Management / Maintenance	Operation/Field, Administrative
Job Skills and Knowledge	Operation/Field, Administrative, Professional/Technical
Learning / Continuous Improvement	Administrative, Professional/Technical, Supervisory/Managerial, Executive
Problem Solving / Conceptual Thinking	Professional/Technical, Supervisory/Managerial, Executive
Leadership and Strategic Planning	Professional/Technical, Supervisory/Managerial, Executive
People / Resource Management	Professional/Technical, Supervisory/Managerial, Executive
Other	All employee groups as needed

Goals can be added to an evaluation plan in one of two ways:

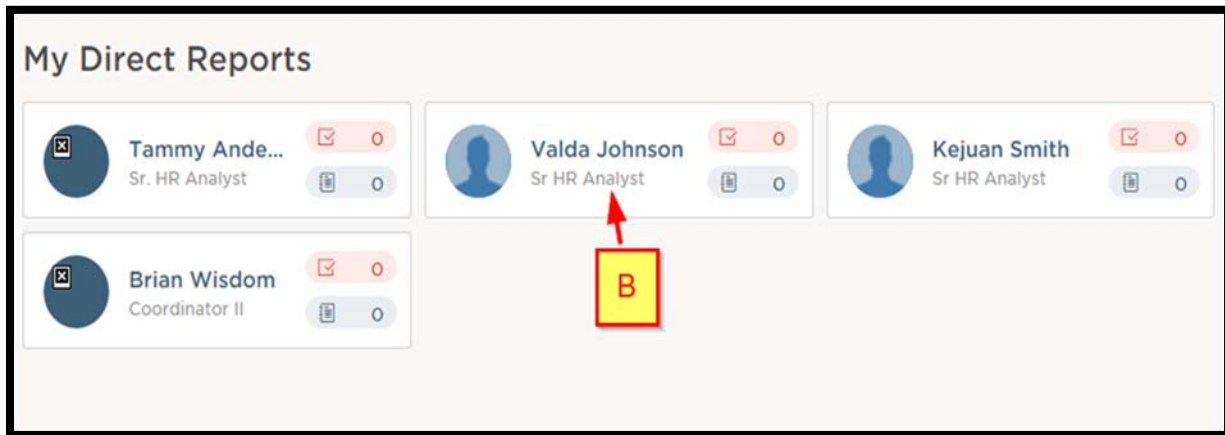
- Goals can be added to an individual employee at one time, or
- Goals can be added in bulk to multiple employees at one time.

### TO ADD GOALS TO AN INDIVIDUAL EMPLOYEE:

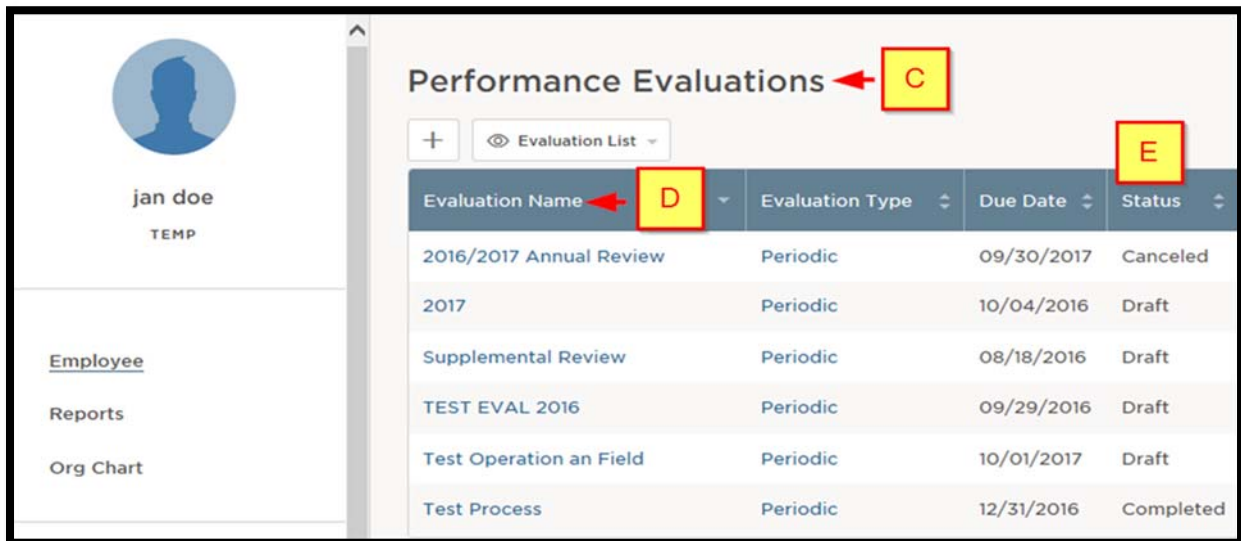
**STEP 1:** The first step is to select an employee one of two ways. You can **[A]** select an employee by clicking “Employees” on the menu bar then select an employee from the list on the list **[B]** or click on the employee’s name in “My Direct Reports” section. SEE THE IMAGE BELOW.



## STEP 3: Add goals to individual employee at once

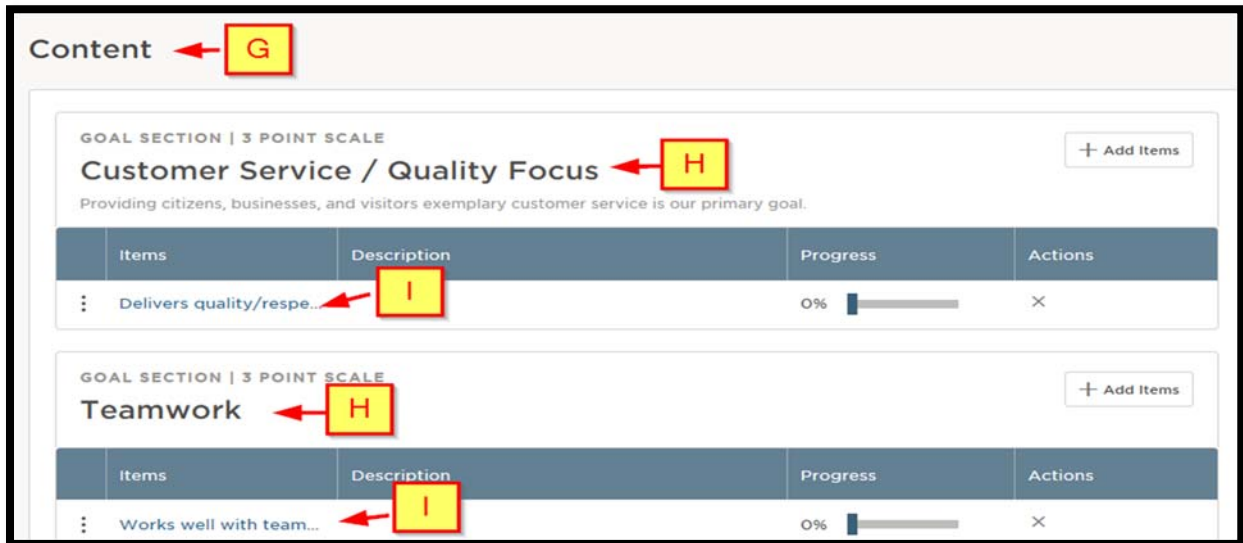


**STEP 2:** After you select an employee, [C] scroll to the Performance Evaluations section. You will [D] select the appropriate evaluation in the "Evaluation Name" column. (see image below). Note: [E] Check the Status column to see that the evaluation is in Draft status. If not in Draft status contact your HR Generalist. SEE IMAGE BELOW.

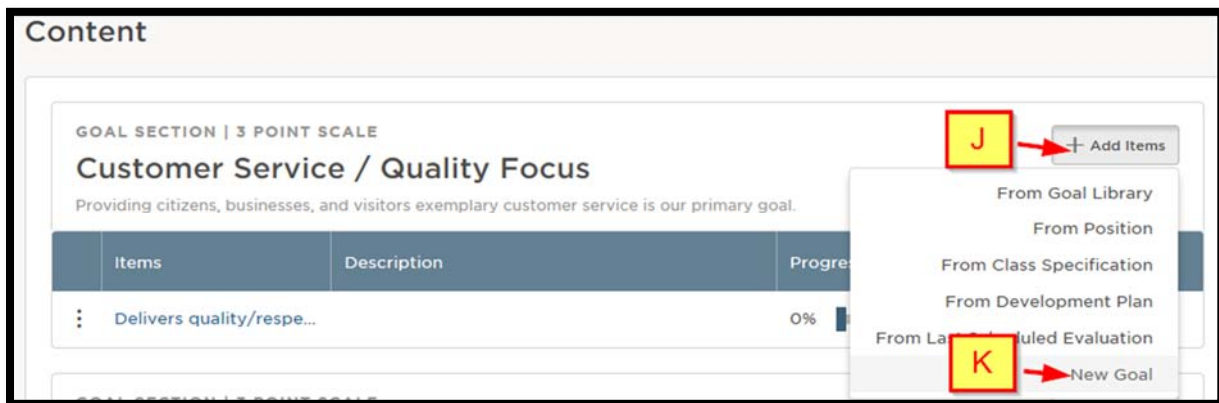


## STEP 3: Add goals to individual employee at once

**STEP 3:** After you open an evaluation from the "Evaluation Name" column (see image above), [F] a page will open where you can start adding goals (see images below). The name of the evaluation will be at top of the window. You will [G] scroll down to the "Content" section. You will [H] add goals to Key Performance Areas. Some of the [I] Key Performance Areas may have at least one pre-populated goal. **You will add department, division, and/or work-unit specific goals.** SEE IMAGES BELOW.

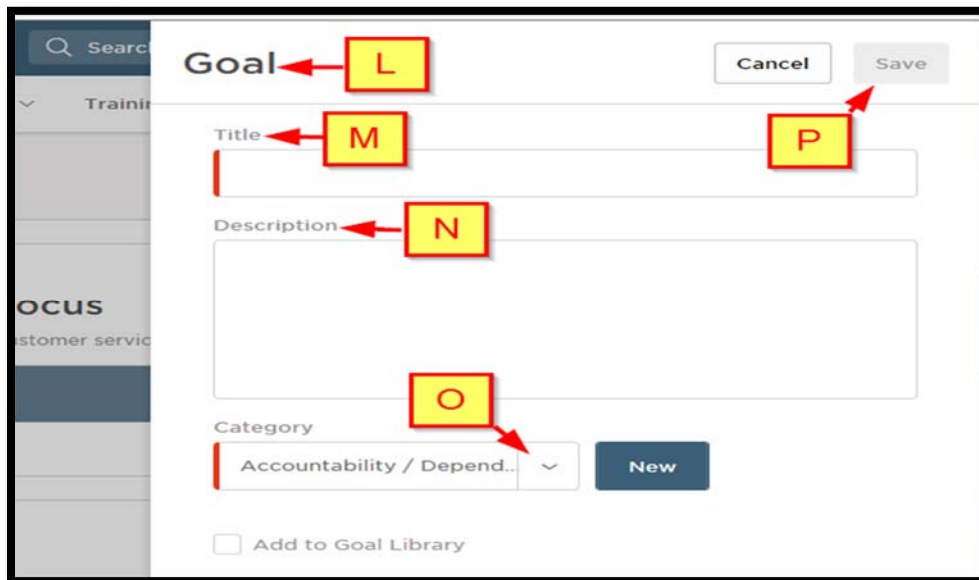


**STEP 4:** [J] In the "Content" section click the "Add items" button in the Key Performance Area you want to add goals to. You will [K] select "New Goal" from the drop-down menu. A pop-up will appear after you click "New Goal". SEE IMAGE BELOW.



## STEP 3: Add goals to individual employee at once

**STEP 5, Final step to add goals at once to individual employee:** After you click “New Goal” a pop-up will appear on the right. **[L]** On the “Goal” pop-up you will **[M]** add a title, **[N]** add a description (optional), **[O]** select the appropriate goal category that matches the Key Performance Area you are adding the goal to and **[P]** click save. **DO NOT ADD NEW CATEGORIES.** **[P]** After you click “Save” you will be taken back to the “Content” section where you will see the new goal. Repeat steps to add additional goals as needed to each Key Performance Area. SEE IMAGE BELOW.

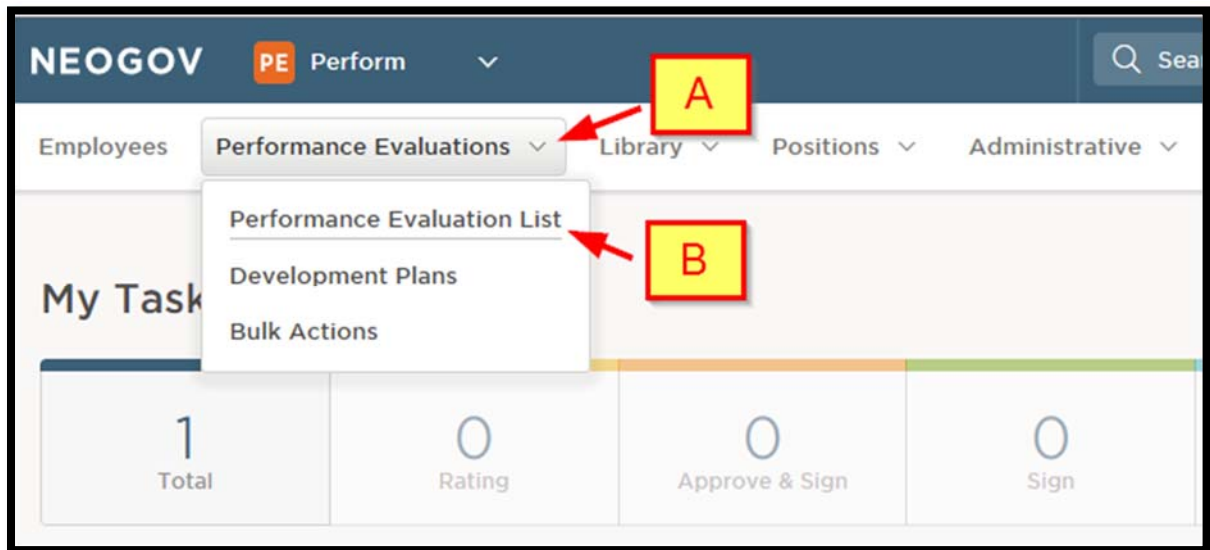


## STEP 3: Add goals to multiple employees at once

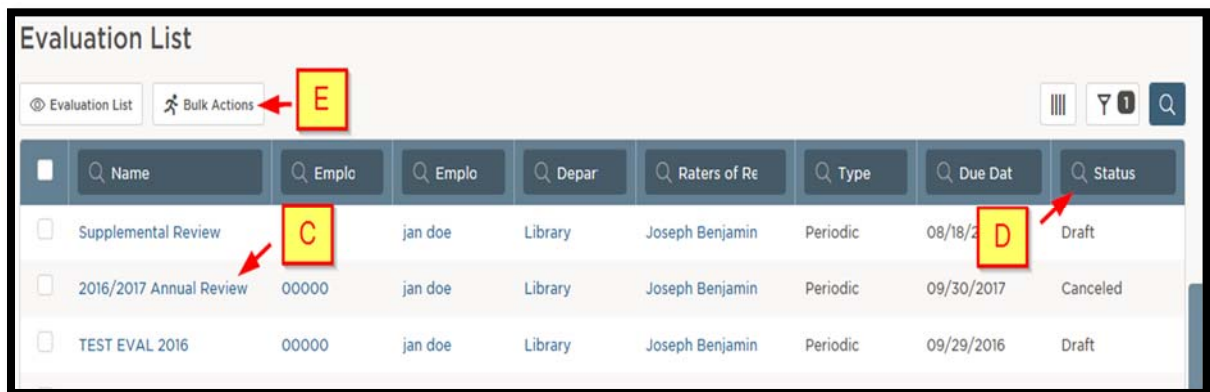
The second option is adding goals all at once to multiple employees.

### TO ADD GOALS ALL AT ONCE TO MULTIPLE EMPLOYEES:

**STEP 1:** On the menu bar **[A]** click “Performance Evaluations” then **[B]** click “Performance Evaluation List” on the drop-down menu. SEE IMAGE BELOW.

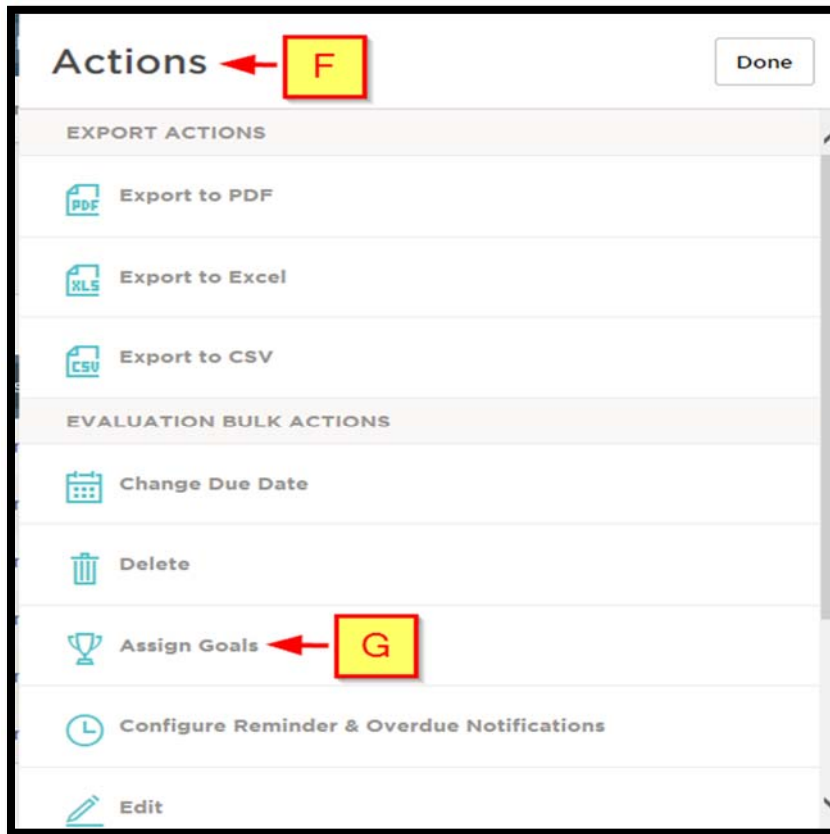


**STEP 2:** On the resulting page, **[C]** for each employee click the box (in left column) next to the Evaluation Plan Name you want to add bulk goals to. Make sure that the Evaluation Plan(s) have the same name and **[D]** check to see that status is Draft (in the Status column). You cannot add goals if the status is not Draft. You will **[E]** click the “Bulk Actions” icon. A menu will appear on the right side of the browser window. SEE IMAGE BELOW.

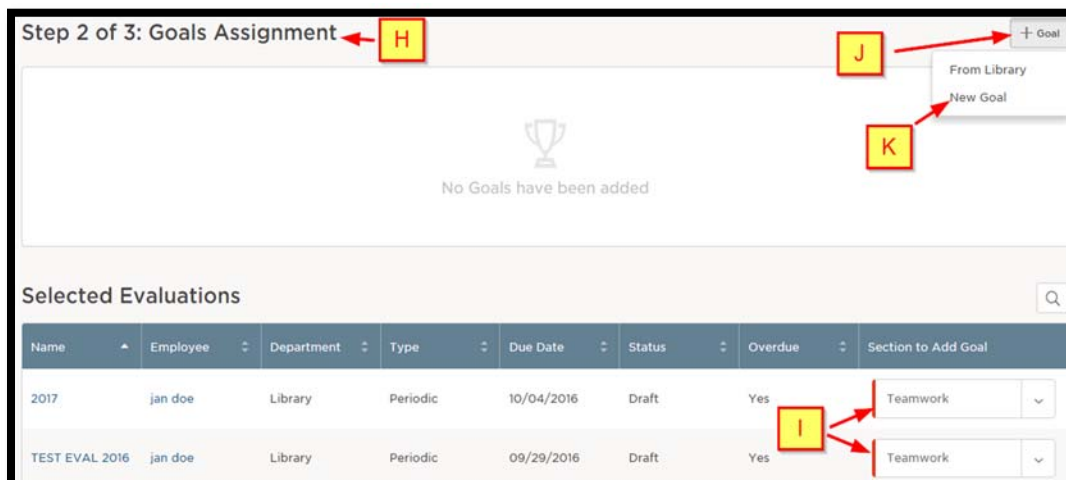


**STEP 3:** After you click the “Bulk Actions” button **[F]** an “Actions” list pop-up will appear on the right. **[G]** Click “Assign Goals” on the menu. SEE IMAGE BELOW.

## STEP 3: Add goals to multiple employees at once



**STEP 4:** After you click "Assign Goals" on the previous page, the "Step 2 of 3: Goals Assignment" page will display. [H] For each employee on "Step 2 of 3: Goals Assignment" page, [I] click the down-arrow in the "Section to Add Goal" column and select the appropriate Key Performance Area you want to add goals to (must be identical for each employee on the page), then [J] click "+Goal" [K] and select "New Goal" from the drop-down list.



## STEP 3: Add goals to multiple employees at once

**STEP 5:** After you click “New Goal” on the previous page [L] the “Add Goal” pop-up window will appear. [M] Type or paste the goal “Title” (the title must be specific to communicate what you want the employee to accomplish), then [N] type or paste the goal Description (optional but this is where you provide clarifying information about the goal title), then [O] select the goal Category, and [P] finally click “Add” to accept the new goal. **NOTE:** To avoid retyping the same goal, you can type all the goals, into a MS Word (or other text editor) document and then copy and paste them in the “Goal Title” field as needed.

The screenshot shows the 'Add Goal' pop-up window. It includes a title bar with the text 'Add Goal' and a yellow box 'L' pointing to it. On the right side of the title bar are 'Cancel' and 'Add' buttons, with a yellow box 'P' pointing to the 'Add' button. Below the title bar is a 'Title' text field with a yellow box 'M' pointing to it. Below the title field is a 'Description' text area with a yellow box 'N' pointing to it. Below the description is a 'Category' dropdown menu with 'Accountability / Depend...' selected and a yellow box 'O' pointing to it. To the right of the dropdown is a 'New' button. At the bottom left is a checkbox labeled 'Add to Goal Library'.

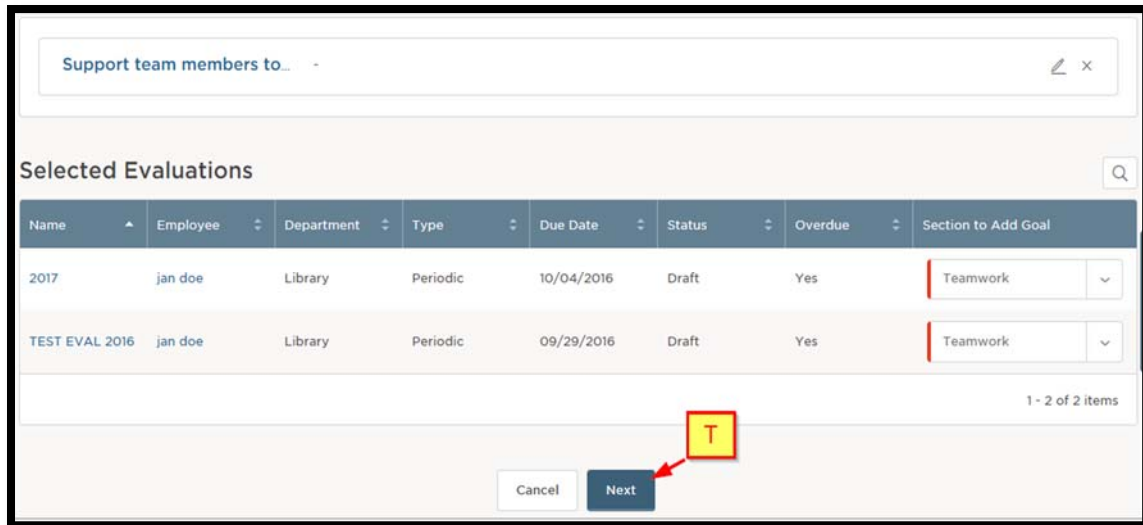
**STEP 6:** After you click “Add” on the previous page, you will be taken to “Step 2 of 3: Goals Assignment” page. [Q] On the “Step 2 of 3: Goals Assignment” page you will see the added goal in this section (see image below). [R] DO NOT CHANGE THE GOAL CATEGORY if you have additional goals to add to the same category. [S] To add more goals to the same category repeat Step 5 again. SEE IMAGE BELOW.

The screenshot shows the 'Step 2 of 3: Goals Assignment' page. At the top right is a '+ Goal' button with a yellow box 'S' pointing to it. Below it is a search bar with the text 'Support team members to...' and a yellow box 'Q' pointing to it. Below the search bar is a section titled 'Selected Evaluations' with a search icon. Below this is a table with columns: Name, Employee, Department, Type, Due Date, Status, Overdue, and Section to Add Goal. The table has two rows. The first row has '2017', 'jan doe', 'Library', 'Periodic', '10/04/2016', 'Draft', 'Yes', and 'Teamwork'. The second row has 'TEST EVAL 2016', 'jan doe', 'Library', 'Periodic', '09/29/2016', 'Draft', 'Yes', and 'Teamwork'. A yellow box 'R' is pointing to the 'Teamwork' dropdown in the second row. At the bottom right is '1 - 2 of 2 items'.

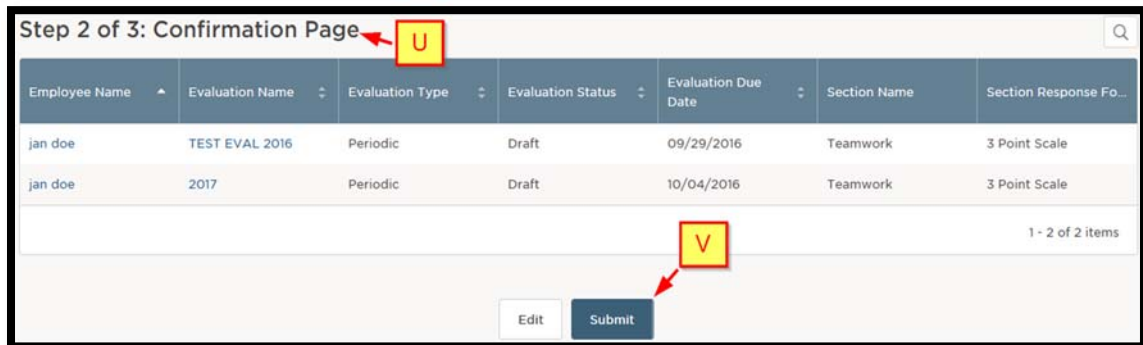
Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
2017	jan doe	Library	Periodic	10/04/2016	Draft	Yes	Teamwork
TEST EVAL 2016	jan doe	Library	Periodic	09/29/2016	Draft	Yes	Teamwork

## STEP 3: Add goals to multiple employees at once

**STEP 7:** After adding goals to the same category, **[T]** scroll to bottom of page and click "Next". SEE IMAGE BELOW.



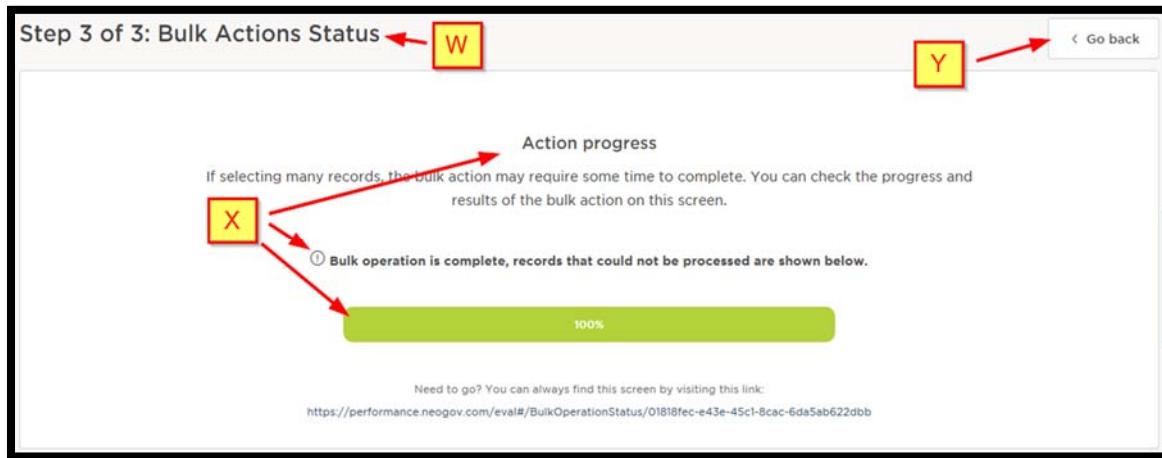
**STEP 8:** After you click "Next" on previous page, **[U]** "Step 2 of 3: Confirmation Page" will appear. **[V]** Click the "Submit" button. SEE IMAGE BELOW



**STEP 9, FINAL STEP TO ADD GOALS AT ONCE TO MULTIPLE EMPLOYEES:** After you click "Submit" button on previous page, **[W]** "Step 3 of 3: Bulk actions Status page" will appear where **[X]** you will see Action progress, status and completion percent. **[Y]** Click "Go back" to return to the "Evaluation List" page where you can start the process again. SEE IMAGE BELOW

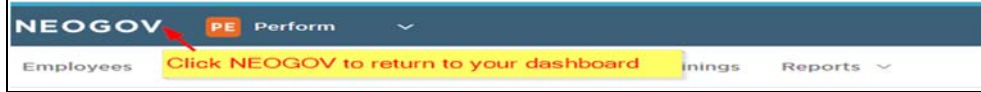


## STEP 3: Add goals to multiple employees at once



## STEP 4: Activate Evaluation Plan

**NOTE:** To return to your Dashboard click "NEOGOV" at upper left of browser window.



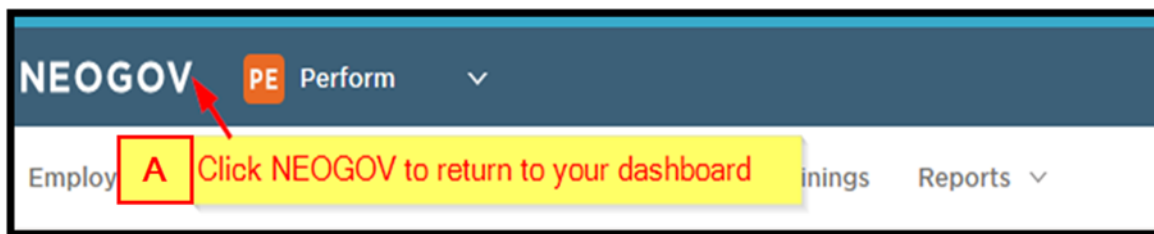
Now that SMART goals have been set, it is time to activate the evaluation plan. Activating the evaluation plan is the final step before routing the plan for e-Signatures.

### Evaluation Plans must be activated individually.

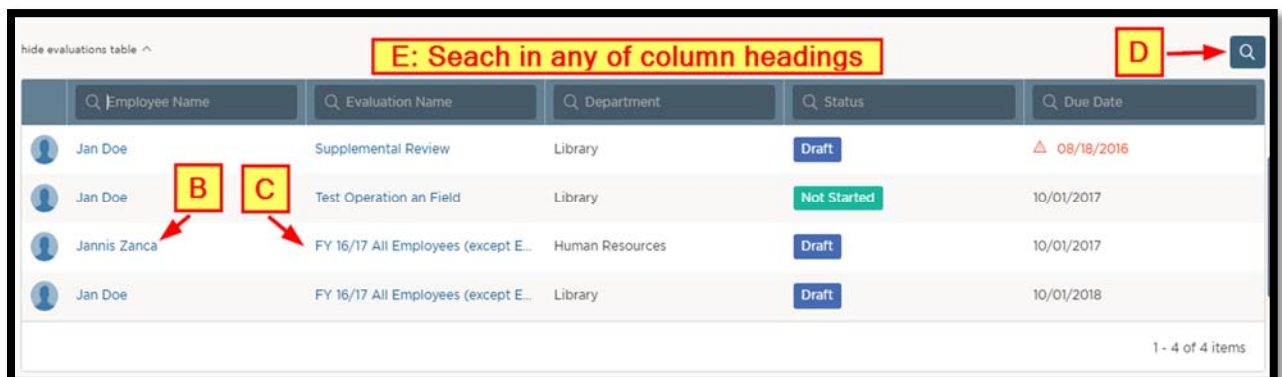
At this time NEOGOV does not support bulk activation of evaluation plans. You have to activate them once at a time individually.

**To activate an employee's evaluation plan**, start from the Dashboard view. Click "NEOGOV" on the menu bar to return to your Dashboard.

**STEP 1: [A]** On the menu bar click "NEOGOV" to return to your Dashboard (see image below).



**STEP 2:** Scroll to the bottom. **[B]** Locate the employee's name in the "Employee Name" column and **[C]** in the "Evaluation Name" column click the name of the evaluation you want to open for the identified employee. **[D]** You can also search for an employee by clicking the search icon **[E]** then enter search criteria in any of the column headings. (see image below).

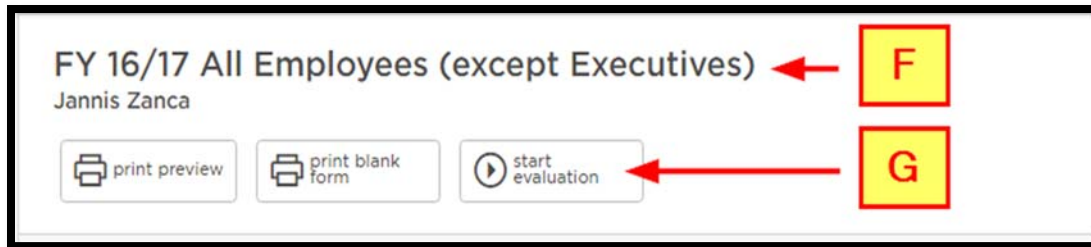


Employee Name	Evaluation Name	Department	Status	Due Date
Jan Doe	Supplemental Review	Library	Draft	08/18/2016
Jan Doe	Test Operation an Field	Library	Not Started	10/01/2017
Jannis Zanca	FY 16/17 All Employees (except E...	Human Resources	Draft	10/01/2017
Jan Doe	FY 16/17 All Employees (except E...	Library	Draft	10/01/2018

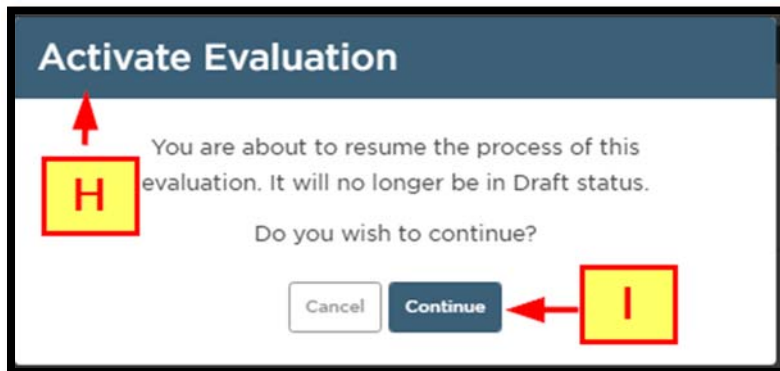
The screenshot shows a table titled 'hide evaluations table'. The table has five columns: Employee Name, Evaluation Name, Department, Status, and Due Date. There are four rows of data. Callout 'B' points to 'Jan Doe' in the first column, and callout 'C' points to 'Test Operation an Field' in the second column. Callout 'D' points to a search icon in the top right corner. Callout 'E' points to a yellow box containing the text 'Search in any of column headings' above the table headers.

## STEP 4: Activate Evaluation Plan

**STEP 3:** After you click the evaluation name you will be taken to the “Evaluation Details” page. **[F]** The evaluation name will be at the top-center pane of the page (see image below). **[G]** Click “start evaluation” button. SEE IMAGE BELOW.



**STEP 4:** After you click “start evaluation”, **[H]** an “Activate Evaluation” pop-up will appear prompting you to confirm that you want to activate the evaluation. **[I]** Click “Continue”. SEE IMAGE BELOW.



**STEP 5, Final step in activating evaluation plan for individual employee:** After you click “continue” the pop-up will close. **[J]** In the “General Information” section status will now show “Not Started”. This enables the evaluation to begin and start routing for e-Signatures. SEE IMAGE BELOW.

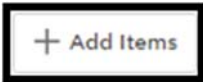



## STEP 4: Activate Evaluation Plan


After activation, you will receive an email with an action to “Add goals”. Follow the link in the email or return to your task pane to access the task. After you click the task a page to “Add Items” will open on the right.

You should have already added goals in “STEP 3: Add goals. . .”

If goals have already been added click , then enter notes in the comments box and click save.

If you need to add goals, click  (for each Key Performance Area)

then click , enter a “Title”, enter a “Description” (optional to provide details to further describe the goal), select the “Category” to match the Key

Performance Area you are entering the goal into, and finally click .

**See STEP 5 on the next page. for the process to complete all task related to** (1) getting departmental approval (level above the manager/supervisor) and (2) reviewing the plan with the employee (3) before it is finally signed by the employee.

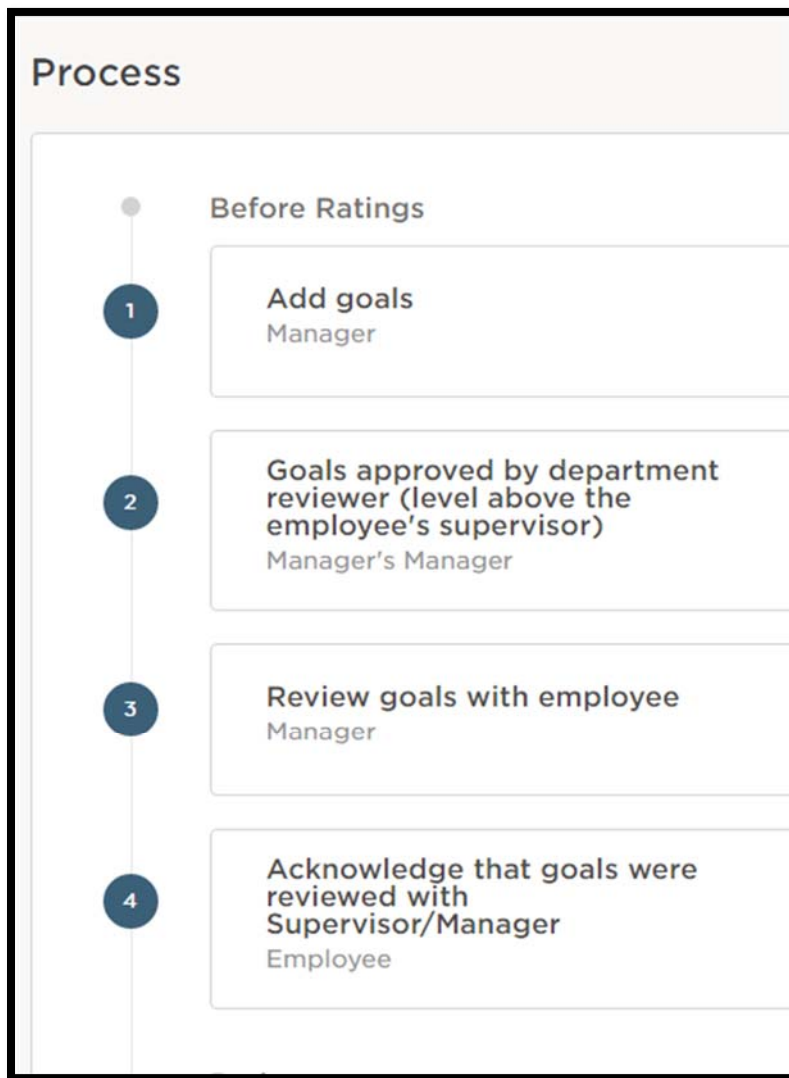
## STEP 5: Review and route for e-Signatures

**NOTE:** See “PART3: Basic Navigation” for help on how to navigate the menu bar and Dashboard.

Before you review the Evaluation Plan and route for e-Signatures you must (1) add goals to the plan and (2) activate the plan. If you have not added goals and activated the plan, see the process above before attempting the actions below.

**These are the process steps to (1) review the plan with your employee(s) and (2) route for e-Signatures** (after goals have been added and activating the evaluation plan).

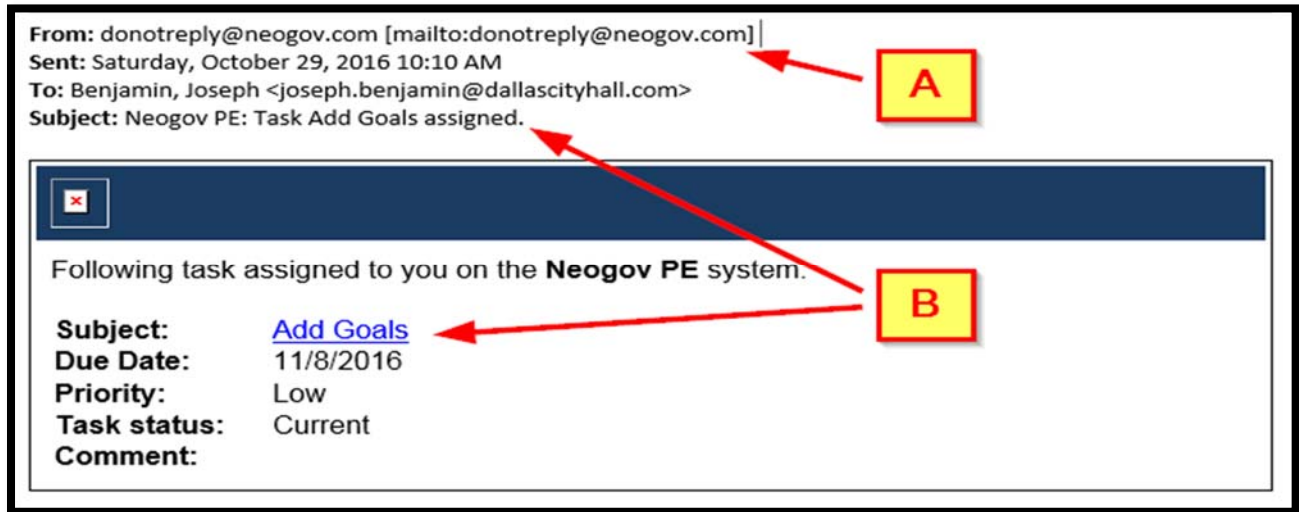
**NOTE:** Printing for signatures is not required. All signatures will be captured in NEOGOV.



## STEP 5: Review and route for e-Signatures

After the Evaluation Plan has been activated (see the image below, **[A]** the supervisor will receive messages (action items) from "donotreply@neogove.com" (see image below). **[B]** The name of the task will be in the "Subject" field of the email header and body. SEE IMAGE BELOW.

This is an example of an email you will receive:

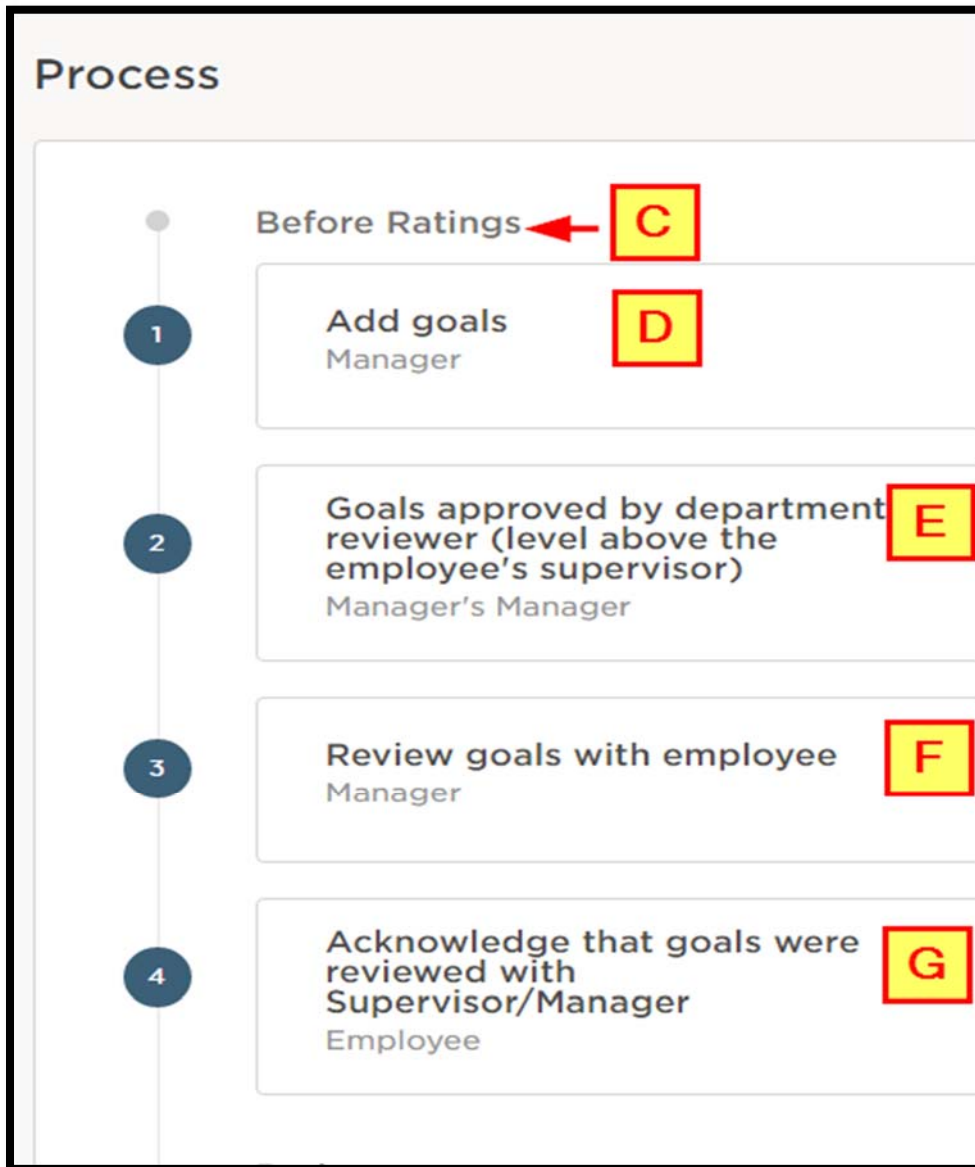


The image (and steps) below shows the process flow and messages that will be received by the manager/supervisor and employee related to (1) reviewing and approving the evaluation plan and (2) e-Signatures.

- **[C]** "Before Ratings" (see image below) are actions/activities that will be done before the employee and supervisor can start tracking progress and adding comments to each Key Performance Area.
- **[D]** The first **1** message (see image below) will be received by the manager/supervisor after the Evaluation Plan has been activated. NOTE: This process should have already been completed. After this task is approved the reviewer (level above the employee's supervisor/manager) will receive the next action item (see image below).
- **[E]** The second **2** message (see image below) will be sent to the departmental reviewer (level above the employee's supervisor/manager) for approval. After this task is approved the supervisor will receive the next action item (see image below).
- **[F]** The third **3** message (see image below) will be sent to the manager/supervisor. The manager/supervisor will meet with the employee to review the evaluation plan (online). After this task is approved the employee will receive the next action item (see image below).

## STEP 5: Review and route for e-Signatures

- **[G]** The fourth **4** message (see image below) will be sent to the employee. The employee will approve the task. **[G]** After **4** is approved, the employee and manager can start tracking progress and adding comments to Key Performance Areas as defined in "STEP 6 How to Document Progress" on the pages below.




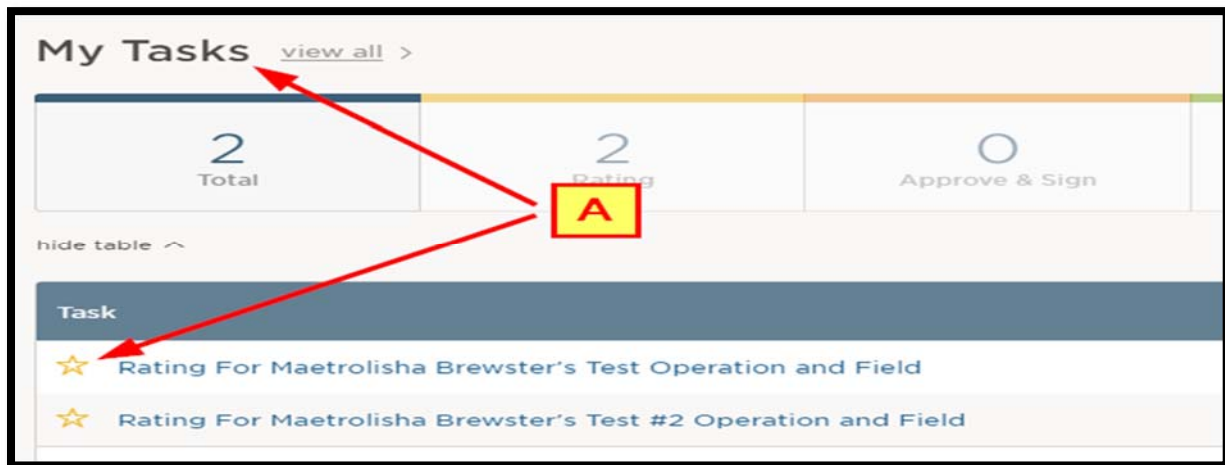
## STEP 6: How to document progress


4

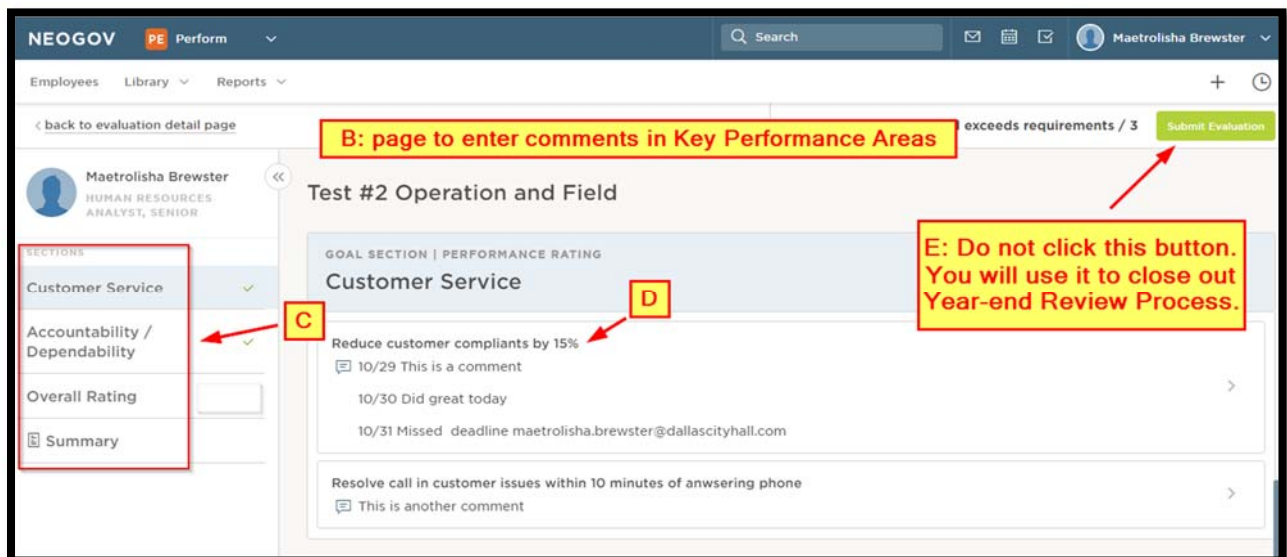
After the employee approves the last (item 4 in the above process flow) action item in the “Before Actions” process flow, the (1) employee and (2) manager/supervisor can start tracking progress and adding comments to Key Performance Areas.



**STEP 1:** After the “Before Actions” action items are closed, [A] an  action item will appear on the employee’s and manager’s/supervisor’s Task List (on the Dashboard).



**STEP 2:** To start entering comments, [B] click a  task [see image above] to open the page where you can enter comments (see image below). [C] In the left column (below you name) is where you will find the Key Performance Areas. [C] Click a goal under a Key Performance Area to see the goals display in the right pane. [E] **Do not complete the “Submit Evaluation” action until “Year-end Review”.** This option will lock your evaluation plan.





## STEP 6: How to document progress

**STEP 3:** After you click a goal in the center section **[E]** a “GOAL SECTION” page will open where **[F]** you can enter comments for each goal. Revisit the goal to add additional comments. **NOTE:** Enter a date at beginning of each comment to keep track of timeline inputs. **[G]** Click “Next” button to advance to the next Goal/Key Performance Area to input additional goals **[H]** or click “Done” to end the process. **NOTE:** Comments will auto save after you click Done or Next.

Repeat the steps as needed to enter additional goals.

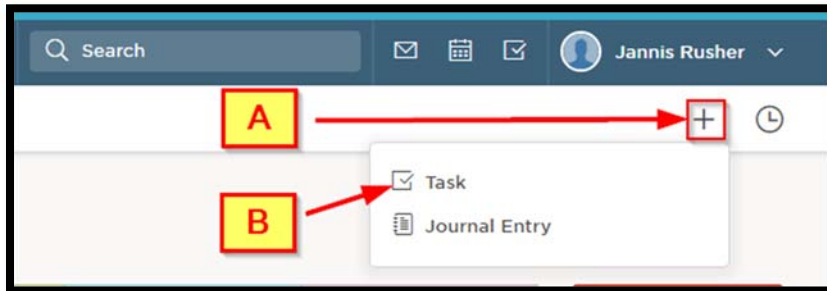


## STEP 7: Creating and closing tasks


### HOW TO CREATE A TASK AND ASSIGN TO YOURSELF

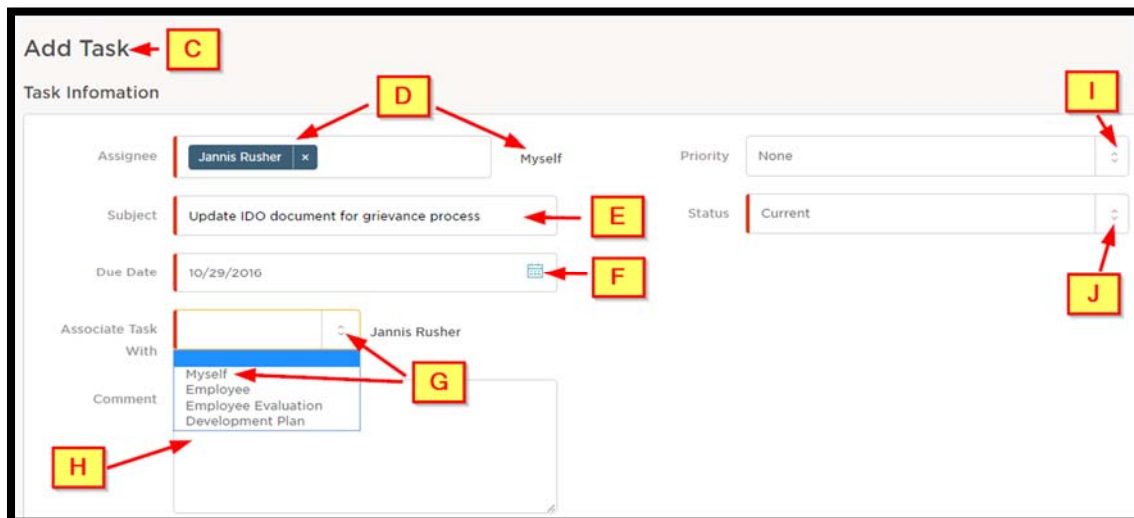
**STEP 1:** Click NEOGOV on the menu bar to return to your Dashboard.

**STEP 2:** [A] Under your name, click the " + " sign, [B] then click "Task". SEE IMAGE BELOW.

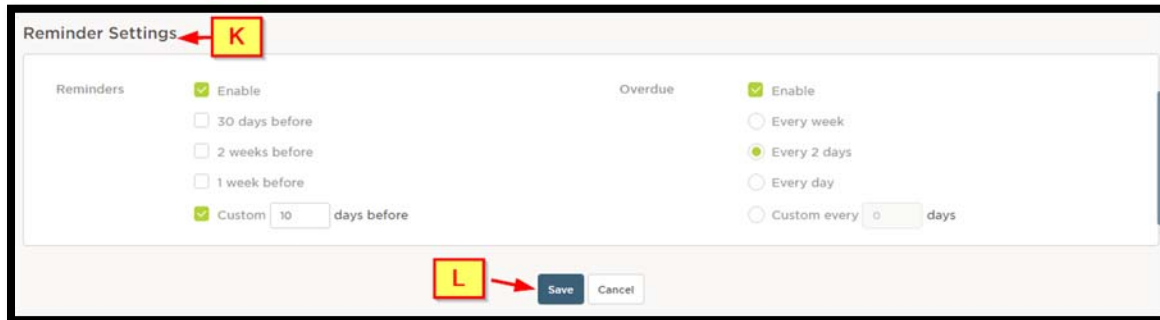


**STEP 3:** After you click "Task" from the previous step, [C] the "Add Task" page will display.

- [D] Click "Myself" and your name will populate the "Assignee" field.
- [E] Enter a "Subject".
- [F] Select a "Due Date" after clicking the calendar icon .
- [G] Click in the "Associate Task With" field then select "Myself" from the menu list.
- [H] Comments field.
- [I] Click in the "Priority" field then select an option from the list.
- [J] Click in the "Status" field then select an appropriate option from the list.
- [K] Scroll to "Reminder Settings" and choose appropriate settings for your task.
- [L] Click "Save".



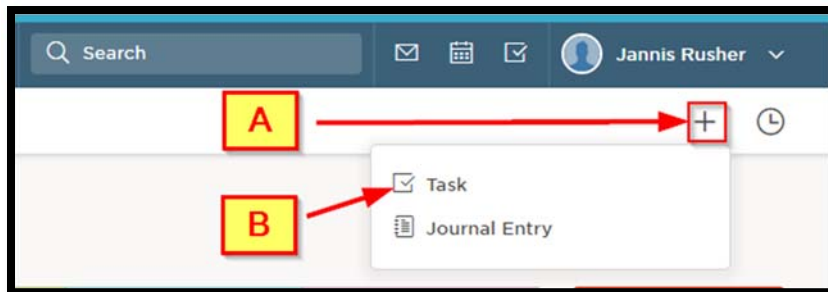
## STEP 7: Creating and closing tasks




### HOW TO CREATE A TASK AND ASSIGN TO OTHERS

**STEP 1:** Click NEOGOV on the menu bar to return to your Dashboard.

**STEP 2:** [A] Under your name, click the " + " sign, [B] then click "Task". SEE IMAGE BELOW.



**STEP 3:** After you click "Task" from the previous step, [C] the "Add Task" page will display.

- [D] Click in the "Assignee" field and type the name or employee number of employee and then select the employee's name. Repeat to add multiple employees.
- [E] Enter a "Subject".
- [F] Select a "Due Date" after clicking the calendar icon .
- [G] Click in the "Associate Task With" field then select an option from the menu list. If you select "Employee", type employee's name in the field then select it (can add multiple employees).
- [H] Comments field.
- [I] Click in the "Priority" field then select an option from the list.
- [J] Click in the "Status" field then select an appropriate option from the list.
- [K] Scroll to "Reminder Settings" and choose appropriate settings for your task.
- [L] Click "Save".

## STEP 7: Creating and closing tasks

**Add Task** ← **C**

**Task Information**

Assignee: Jannis Rusher **D** Myself **I**

Priority: None **J**

Subject: Update IDO document for grievance process ← **E**

Status: Current **J**

Due Date: 10/29/2016 ← **F**

Associate Task With: Jannis Rusher **G**

Comment: Employee Evaluation Development Plan **H**

**Reminder Settings** ← **K**

Reminders  Enable

30 days before

2 weeks before

1 week before

Custom 10 days before

Overdue  Enable

Every week

Every 2 days

Every day

Custom every 0 days

**L** → Save Cancel

### HOW TO UPDATE TASK STATUS

**STEP 1:** Click NEOGOV on the menu bar to return to your Dashboard.

**STEP 2:** **[A]** The “My Task” section will appear at the top of the Dashboard. **[B]** Click a “task category” in the “My Tasks” section. **[C]** A task list will appear below the task bar. **[D]** Click on a task title and a window will appear right side of screen. SEE IMAGE BELOW.

**NEO GOV** PE Perform Search jan doe

Employees Library Trainings

**My Tasks** view all **A** **B: Task Categories**

2 Total 0 Rating 0 Approve & Sign 0 Sign 0 Approve 2 Other 0 Overdue

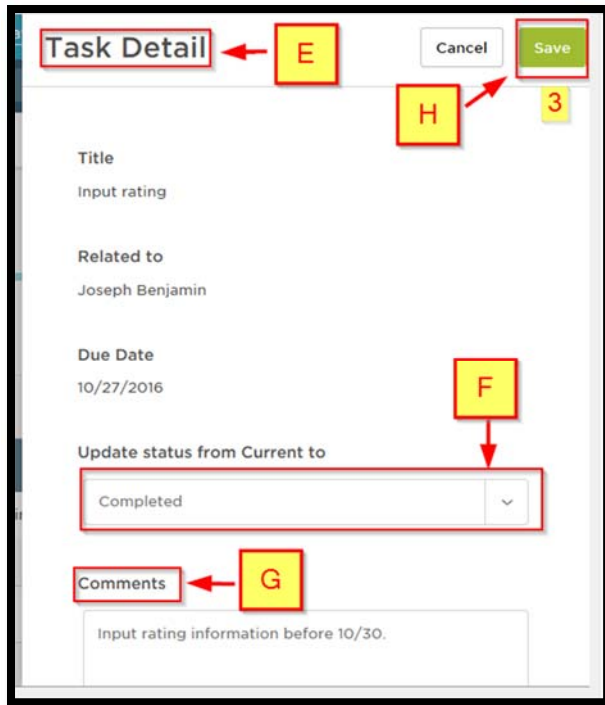
hide table **C: Task list from category**

Task	For Employee	Related To	Due Date
Input rating ← <b>D</b>	Joseph Benjamin	N/A	10/27/2016
Update ISO process flow for disciplinary actions	jan doe	N/A	11/09/2016

1 - 2 of 2 items

## STEP 7: Creating and closing tasks

**STEP 3, Final step to update task status:** [E] A "Task Detail" window will open on the right side of the screen. [F] You can update the status, [G] then add appropriate comments and [H] click save. SEE IMAGE BELOW.

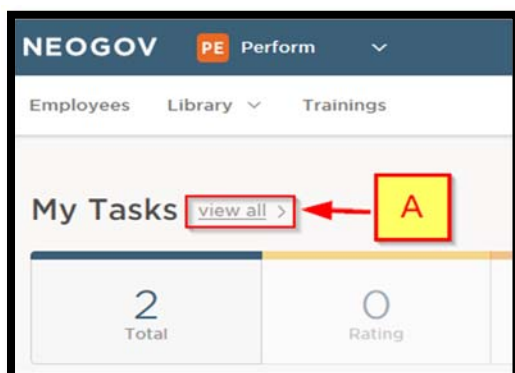


### HOW TO FILTER TASKS (TWO OPTIONS)

#### OPTION 1: Filtering by selecting "view all"

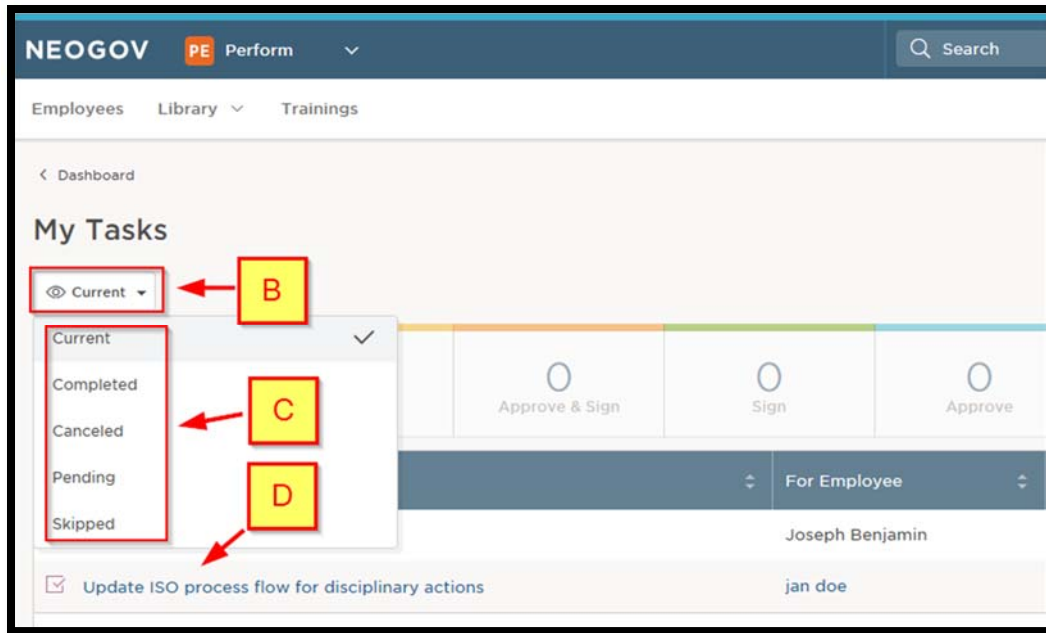
**STEP 1:** Click NEOGOV on the menu bar to return to your Dashboard.

**STEP 2:** [A] To start filtering "all tasks" click "view-all". SEE IMAGE BELOW.



## STEP 7: Creating and closing tasks

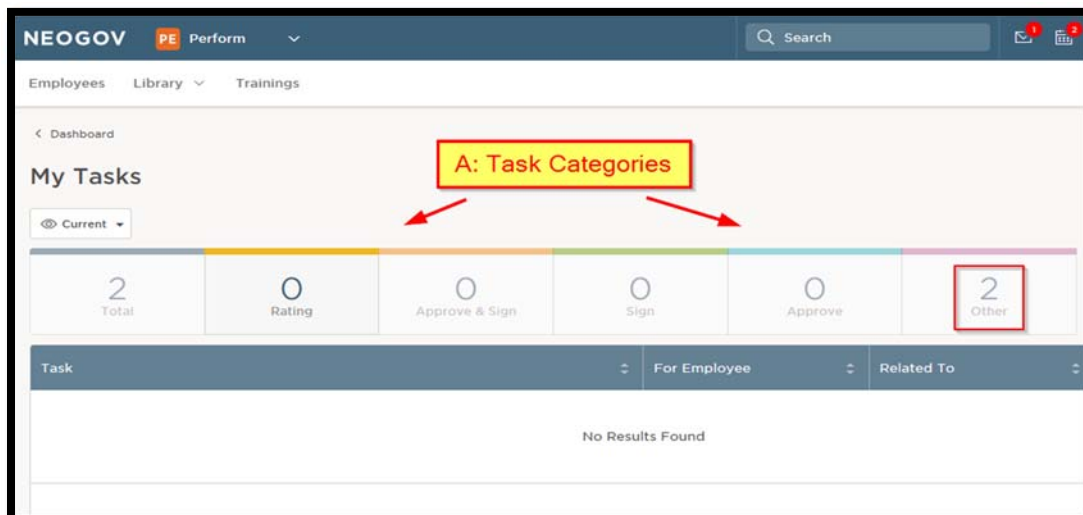
**STEP 3:** After you click “**view-all**”, **[B]** click the down arrow next to “**Current**” to see the list of available options. **[C]** Click an option from the menu and **[D]** the list will display in task list. Follow the instructions on **HOW TO UPDATE TASK STATUS**.



### OPTION 2: Filtering by clicking into a category

**STEP 1:** Click NEOGOV on the menu bar to return to your Dashboard.

**STEP 2:** **[A]** To start filtering a category click the category you want to view. SEE IMAGE BELOW.



## STEP 7: Creating and closing tasks

**STEP 3:** After you click into a category, **[B]** tasks will display in the task pane. Follow the instructions on **HOW TO UPDATE TASK STATUS**.

The screenshot shows the 'My Tasks' interface. At the top, there is a dropdown menu set to 'Current'. Below this is a summary bar with six colored segments: Total (2), Rating (0), Approve & Sign (0), Sign (0), Approve (0), and Other (2). Below the summary bar is a table with columns: Task, For Employee, and Related To. The table contains two rows of tasks. The first row is 'Input rating' for 'Joseph Benjamin' with 'N/A' related to. The second row is 'Update ISO process flow for disciplinary actions' for 'jan doe' with 'N/A' related to. A red box highlights the task 'Update ISO process flow for disciplinary actions', and a yellow box with the letter 'B' points to it.

Task	For Employee	Related To
<input checked="" type="checkbox"/> Input rating	Joseph Benjamin	N/A
<input checked="" type="checkbox"/> Update ISO process flow for disciplinary actions	jan doe	N/A

# PART 3




## Navigation



## Navigating the Menu Bar

The Menu Bar will be at the top of every page you visit. You can perform various actions from the menu bar.

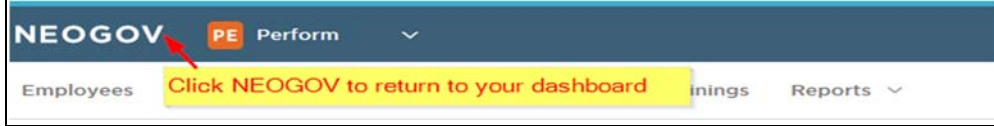
### BRIEF DESCRIPTION OF ITEMS ON THE MENU BAR

- [A] Click **EMPLOYEES** to view a list of your direct reports
- [B] Click **NEOGOV** to return to your Dashboard
- [C] Click **LIBRARY** to view goals in library
- [D] Click **REPORTS** to run reports
- [E] Click  to view your messages
- [F] Click  to view your calendar events
- [G] Click  to view your task pane
- [H] Click to Sign-out, view your profile, access Help menu
- [I] Click to add a task or journal entry
- [J] Click to view recent page view events



# Dashboard Sections

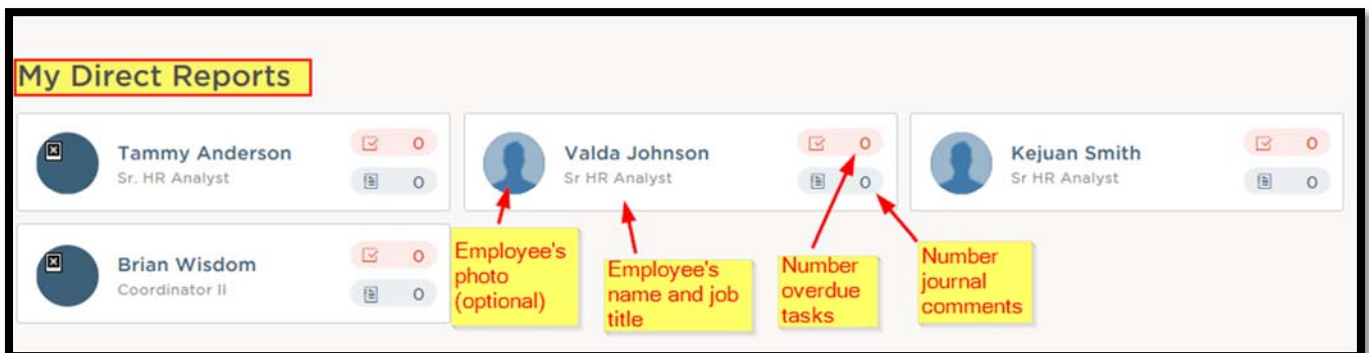
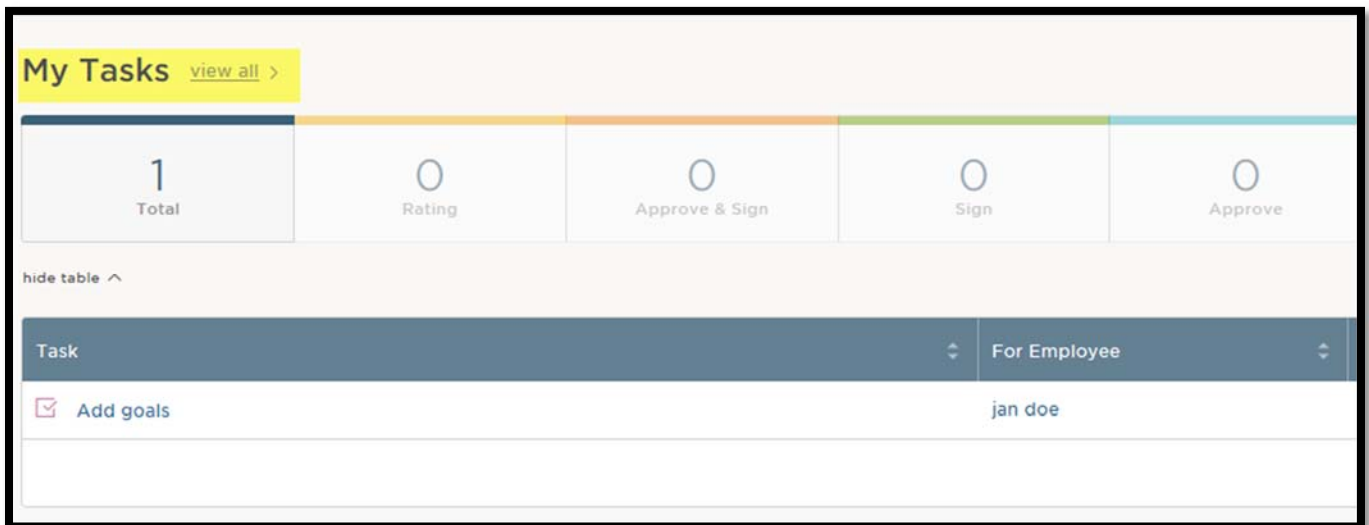
**NOTE:** To return to your Dashboard click "NEOGOV" at upper left of browser window.



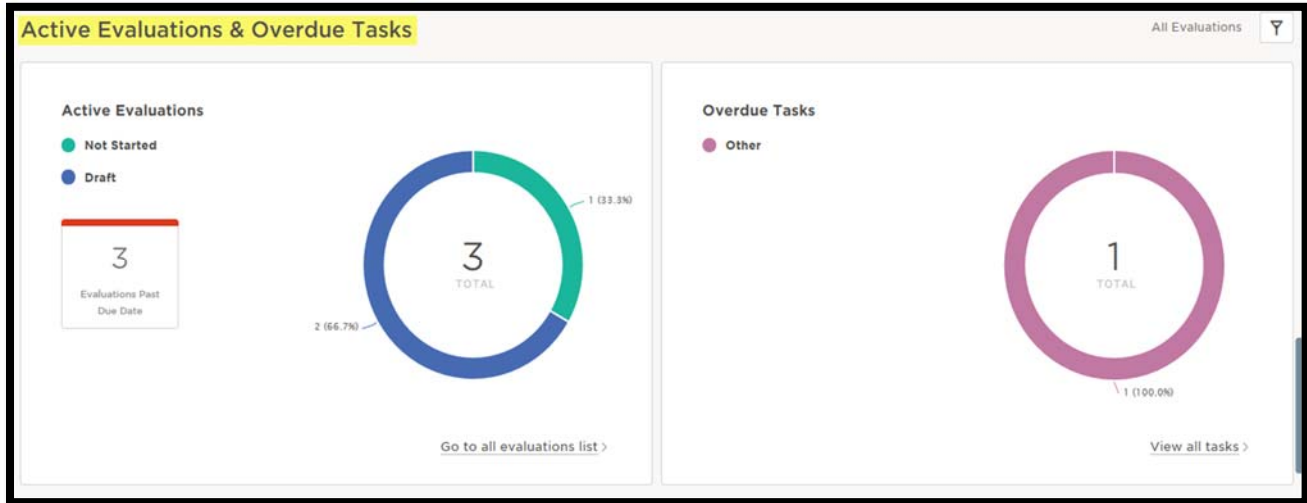
The Dashboard has sections that you can use to navigate to multiple items that support managing performance plans, view employee information and reporting.

**The main sections are:** My Tasks, My Evaluations, My Direct Reports, and Active Evaluations & Overdue Tasks.

You can find all assigned tasks in this section. SEE IMAGE BELOW



# Dashboard Sections



The image below is the resulting page after selecting an employee from “Employees” list or “My Direct Reports” section on the Dashboard.

**Employee Details**

**Jannis Zanca**  
OFFICE ASSISTANT II

Employee #: 00001  
Email: jannis.user@nivri.com  
Position: Office Assistant II  
Address:  
Phone:  
Active: Yes

Class Spec: Office Assistant II  
Department: Human Resources  
\* Org (REQUIRED): PER-Administration  
Online Access: Activated  
Start Date: 10/07/2015  
Separation Date:

**Performance Evaluations**

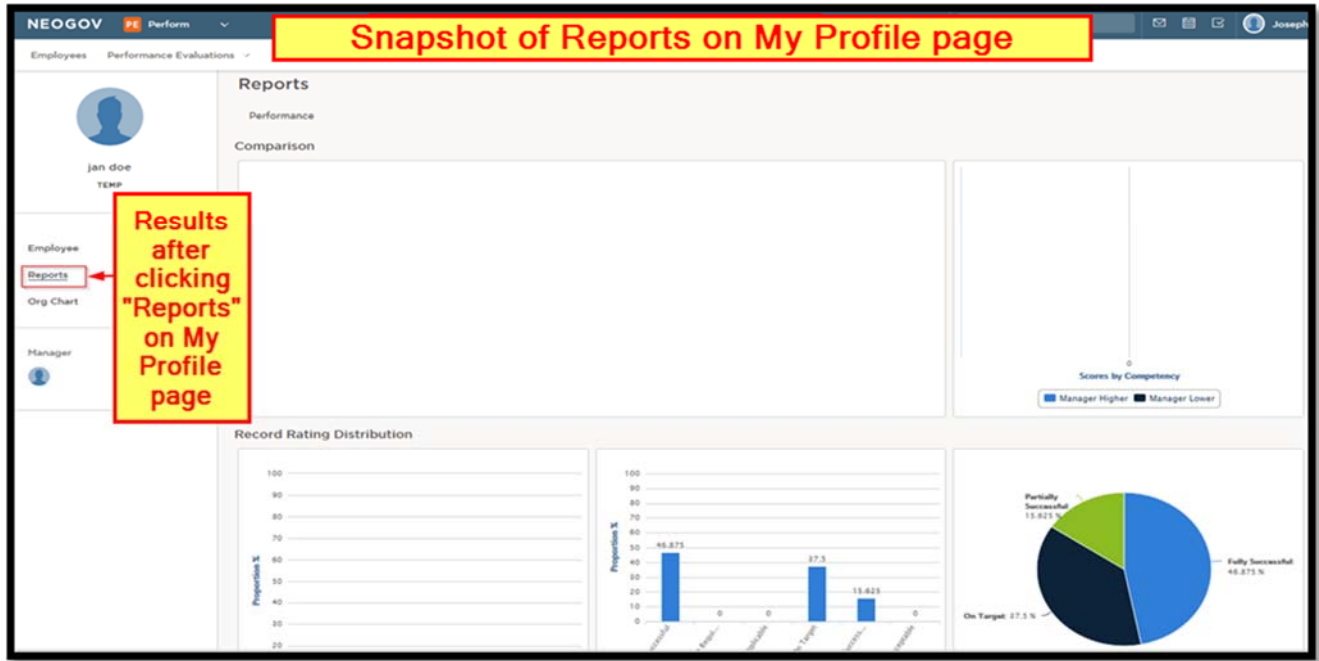
Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Archived	Actions
FY 16/17 All Employees (except Executives)	Periodic	10/01/2017	Draft		No	

**Development Plans**

Development Plan Name	Begin Date	End Date	Actions
No matching records			

# Dashboard Sections

The image below is the resulting page after clicking Reports on employee's "My Profile" page after selecting an employee from "Employees" list or "My Direct Reports" section.



## OTHER TOOLS

Development Plans  
Special Assignments Tracking  
Project Tracking

## Development Plan

Contact your HR Generalist to have a development plan added to your employees' profile.

## Special Accomplishment/Project Plan

Contact your HR Generalist to have a special accomplishment/project plan added to your employees' profile.

