Walla Walla Community College
NEOGOV Perform Supervisor Guide

June 2025

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Overview

This guide details how to navigate the system as a Supervisor/Manager, covering how to rate evaluations, and complete various tasks.

Who Should Use This Guide

This guide is intended for Supervisors/Managers.

Contacts for Questions

Please contact your HR office should you have any additional questions.

Navigating the Dashboard

The NEOGOV Dashboard is the central landing page, where system tasks and records can be accessed.

Navigating to the Dashboard

You can access NEOGOV/Perform through the College's signal sign-on website: sso.wwcc.edu

Click on the NEOGOV tile, and log in using your WWCC credentials.

Upon logging into NEOGOV/Perform, you arrive at your **Dashboard**.

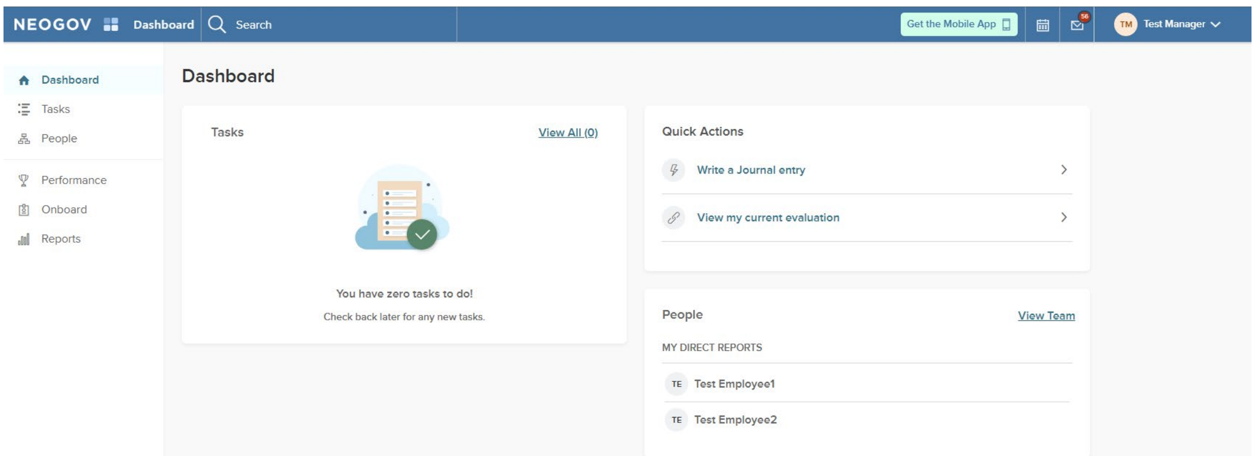

Figure 1: Dashboard

Dashboard Menu: You should see the following pages on the left-hand side menu:

1. **Dashboard:** Brings you to the Dashboard at any time
    a. From your dashboard, you will have a quick view of:
        i. Current Tasks, Overdue Tasks, and All Tasks
        ii. Quick Actions: Journal Entries, Current Evaluation
        iii. People: View your team/direct reports
2. **Tasks:** Lists all your overdue, due this week, due later and completed tasks
3. **People**: Within this page you will see:
    a. My Team: all of your direct reports
    b. My Pre-hires: any upcoming new hires
    c. My Team's Tasks: Perform tasks for your direct reports
    d. Org Chart
4. **Performance:** This is the Perform page. You should see the following:
    a. <u>Overview:</u> will list your current Perform tasks, status of your team's evaluations, and quick links to:

        i. Performance Evaluation List: Any current evaluations for your direct reports will appear here.
        ii. Goal List: All general goals will appear here.
        iii. Competency List: All competencies associated with active performance evaluations will appear here.
        iv. Development Plan List: Any direct reports who have a development plan will appear here.
    b. <u>My Evaluations:</u> Displays your three most recent performance evaluations (if applicable)
    c. <u>My Team's Evaluations:</u> Displays the current step for any in process evaluations for your direct reports
    d. <u>Journal Hub:</u> Contains all Journal Entries that you have created or that have been shared with you, as well as any pending entries and Drafts

5. **Onboard:** This page will take you to your Onboarding portal overview. From here you can access the following:
    a. <u>My Onboarding Portal:</u> this was your portal when you started your onboarding process. There's a lot of information here regarding benefits, ctcLink, Employee Assistance Program and other helpful links and resources.
    b. <u>Forms:</u> Any forms that HR still needs completed.
    c. <u>Downloads:</u> Any downloads from your onboarding process.
    d. <u>Notes & Attachments:</u> Any attachments from your onboarding process

6. **My Profile**: Access your profile by clicking on your name in the upper right-hand corner and select 'My Profile.'

My Tasks

Any current tasks that require your action appear in **My Tasks**. You can filter on each status by selecting a task type. The list below will then only show tasks of that type.

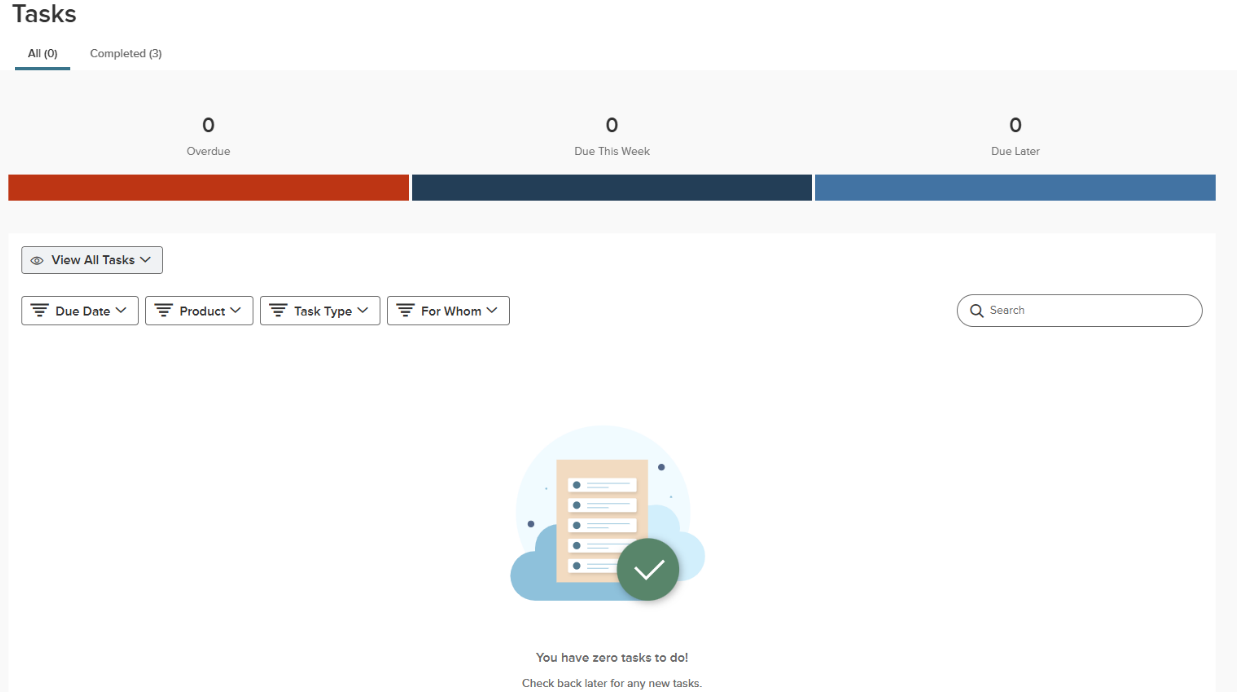

Figure 2: My Tasks

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

1. **Current:** Tasks currently requiring action
2. **Completed:** Tasks you've already acted on
3. **Canceled:** Tasks no longer required
4. **Pending:** Tasks pending another user's action, or tasks for Draft evaluations
5. **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

1. For more information, please refer to **Completing Tasks**

The task types are designated as follows:

- **Total:** All tasks currently requiring your action
- **Rating**: Any rating required on a self-evaluation, a Direct Report's evaluation, a peer rating task, recurring Journal Entry tasks, and Check-Ins (one-time or recurring)
- **Approve and Sign:** Task to approve and 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 (one-time or recurring) and Add/Edit Content tasks
- **Overdue**: Any task with a past due date

The following legend can be used to identify actions that can be taken from the Dashboard:

	= Rate an evaluation
	= Approve and sign
	= Sign
	= Approve an evaluation
	= Other or Manual tasks
	= Recurring Manual task
	= Check-In
	= Recurring Journal Entry

Figure 3: Task Icon Legend

Completing Tasks

As a Supervisor, you have tasks to complete for both yourself and your direct reports. This section covers how to complete various types of tasks.

Navigating to My Tasks

My Tasks is located on your Dashboard. Upon logging into NEOGOV, you land on your Dashboard. Here, you see any current or overdue tasks that require your action.

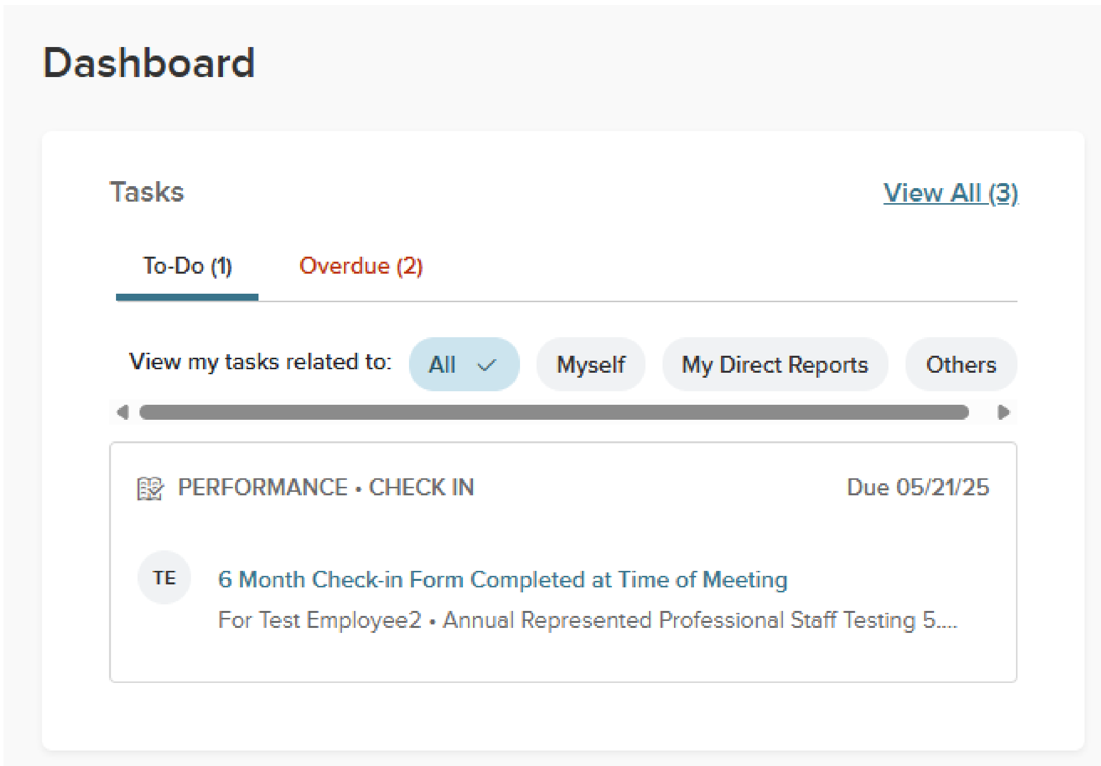

Figure 4: Task List

1. Click into the corresponding **Task Name** from the list
2. A flyout appears with the task details
   a. Enter any comments as necessary
3. When you have completed the task, select **Complete Task**
   a. You receive a green banner once the step has been completed

The next task will become current for the supervisor to complete.

Navigating Check-In Tasks

A reoccurring check-in task will be assigned every 6 months, in order to check-in with your direct report and review goals, accomplishments, objectives and/or areas of improvement in anticipation of the upcoming year's evaluation. Please see **The Evaluation Process** for more details.

To access the task from the **Dashboard**, click on the **Tasks** page, then select the Task.

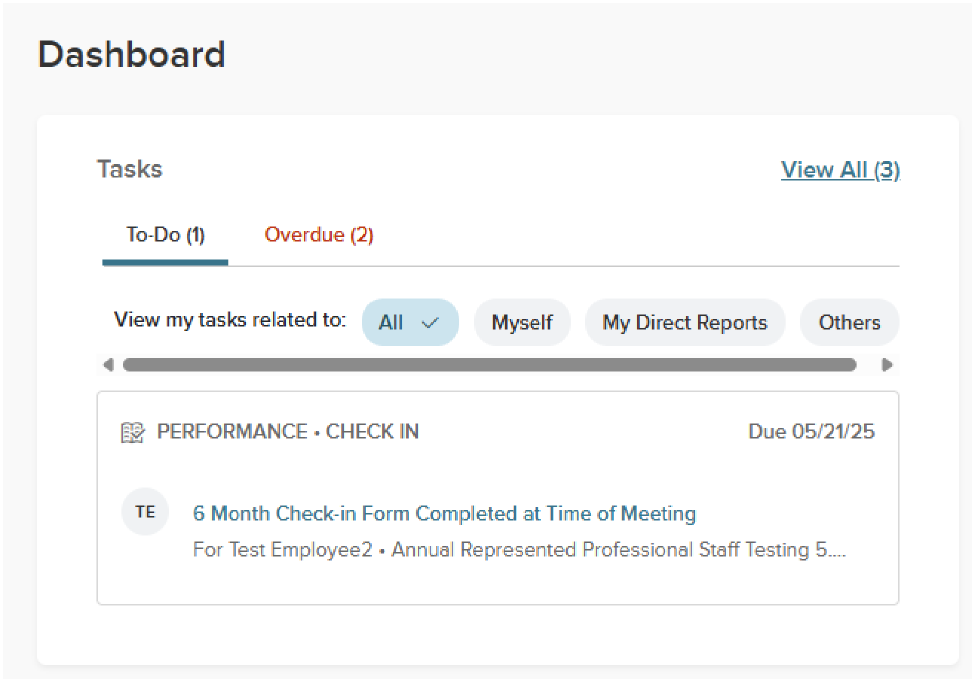

Figure 5: Check-in Task

1. A flyout appears with the Check-In questions
    a. Required questions are highlighted in red and denoted by a red asterisk
2. Journal Entries: Any Journal Entries you have created for the related employee, or any Journal Entries shared with you about the employee, appear in the **Journal Entries** list
    a. You can use the **Add to comment box** button to add any Journal Entry to a check-in question
3. **Previous Check-Ins:** If you have already completed the recurring check-in task at least once, you are able to see your previous entries in the Previous Check-Ins tab of the flyout
    a. This allows you to easily determine what progress has been made by reviewing your previous entries for the same check-in items. The previous check-ins show the date and time it was logged, as well as the check-in items and your responses to them
    b. If the Direct Manager changes during the evaluation period. The New Manager will have access to see all Check-Ins completed by the Previous Manager.

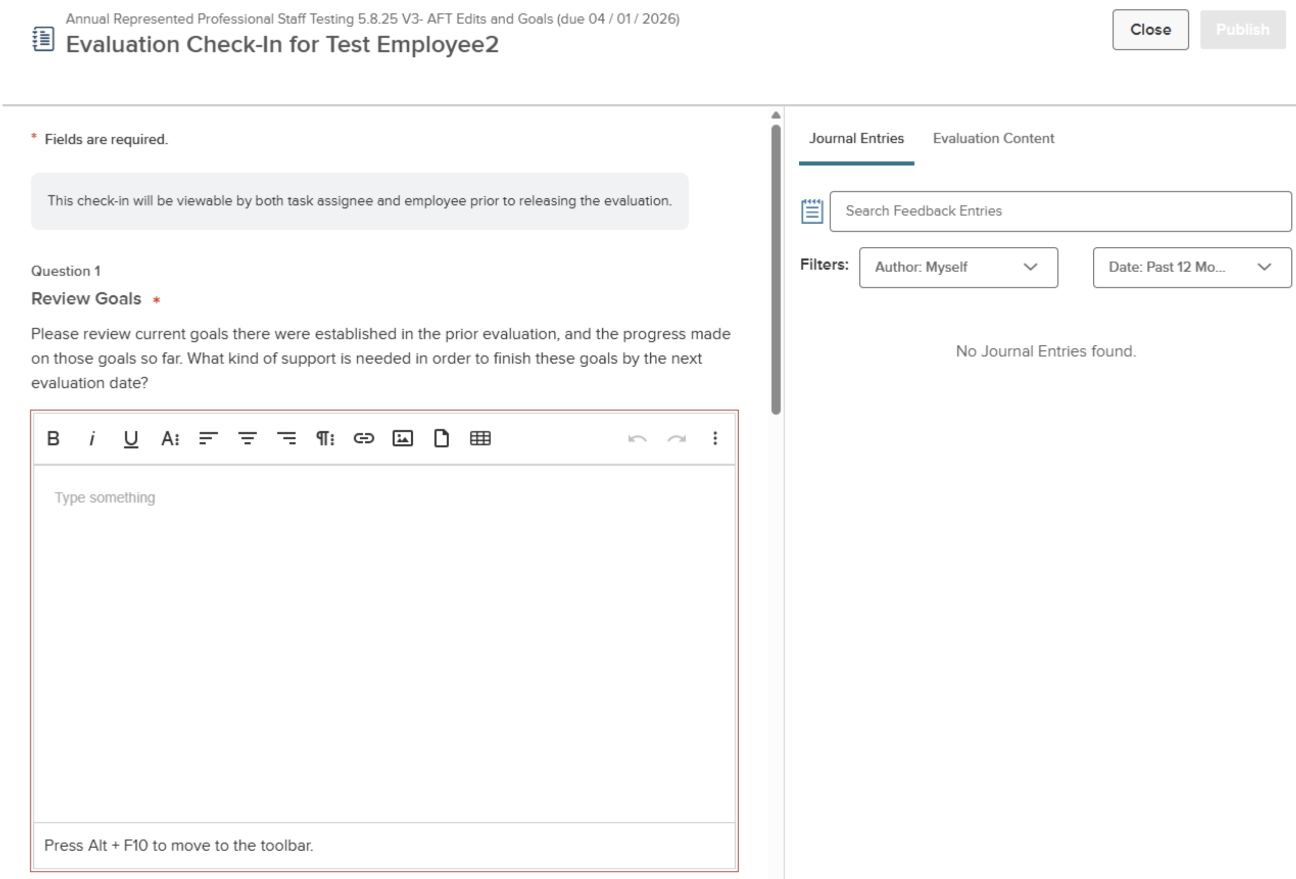

Figure 6: Check-in Form

NOTE: Attachments can be added while completing check-in tasks via the rich text editor. Responses to check-in questions show up in the Feedback Entries section of the evaluation form and any check-in attachments can be downloaded from there.

Once you have completed all required and optional questions, select **Save**. Once the next due date for the recurring task approaches, you will receive a reminder notice to complete the next Check-In form.

The completed task filters out of your dashboard task list. To view the completed task, select the **view all** button as mentioned in **My Tasks**.

My Direct Reports/ My Team

Within the **People** page is the following tabs:

1. **My Team**: A listing of your direct reports.
2. **My Pre-hires**: Any Pre-hires assigned to you.
3. **My Team's Tasks**: Any tasks assigned to the whole team.
4. **Org Chart**: A simplified organizational chart according to the information within NEOGOV.

My Direct Report's Profile

From the **People** page, under the **My Team** tab, click on the name of your direct report to be re-directed to their Profile page.

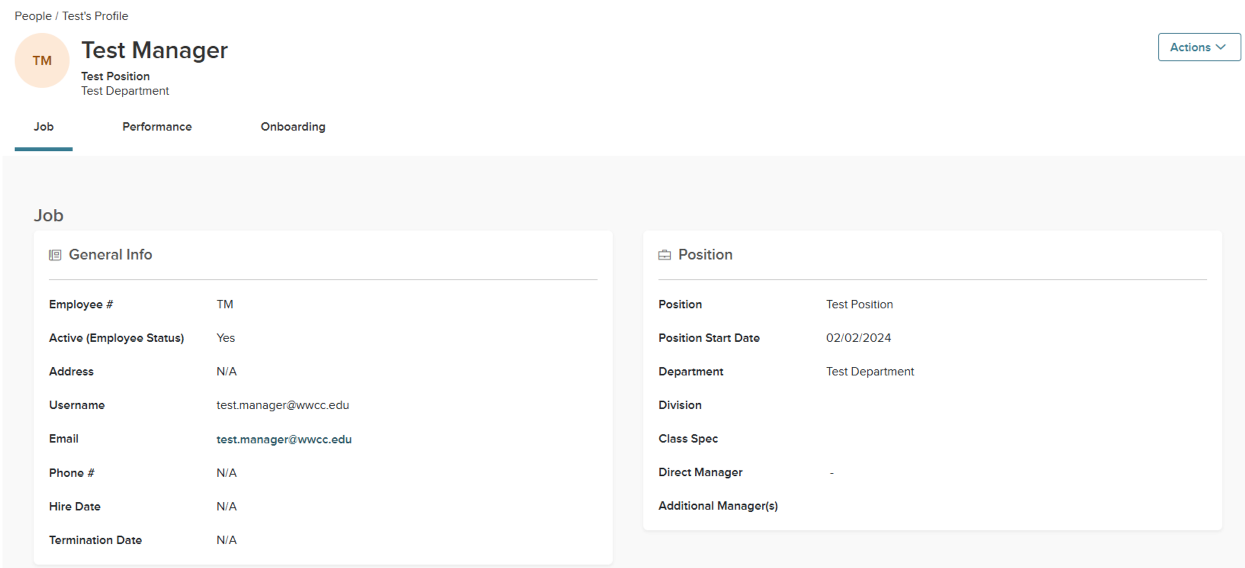

Figure 7: My Profile

From your direct report's profile, you will have the following tabs:

1. **Job:** General Info about the employee such as employee ID #, address, username, email, phone number; as well as Position information such as the position title, start date, department, and direct manager.
2. **Performance:** Will list any current, upcoming, or completed performance evaluations.
3. **Onboarding:** If there are any outstanding onboarding forms, they will be listed here.

<u>**NOTE:**</u> You cannot edit any of your Employee's Information, such as position, email address, etc. If you need to update that information, please contact HR.

Document Upload

Supervisors can upload documents to their Profile, as well as upload documents to any of their direct reports' profiles. This can be helpful if previous paper evaluations, or supporting documentation should be included on the profile page.

To upload documents, navigate to the **Profile** page of the direct report employee, click on the **Performance** tab and click the **Upload** button off to the right.

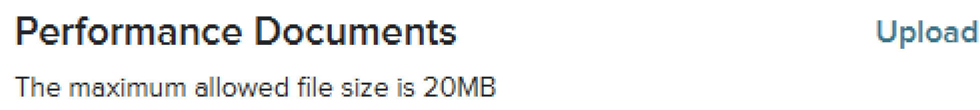

Figure 8: Upload

This opens the Upload Document Flyout. From here you can follow the same steps as you did when uploading a document to your own Profile.

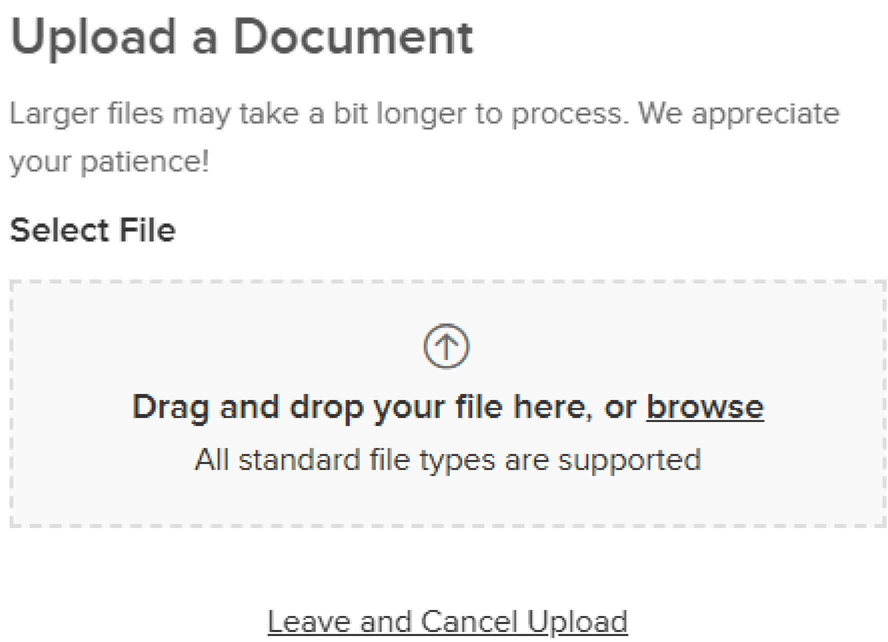

Figure 9: Document Upload Fly-out

Drag and drop, or browse your computer for the file. The maximum file size is 20MB. Once the upload is complete, a success message appears at the top of your screen.

Journal Entries

Journal Entries are an easy and effective way to take notes of accomplishments throughout the year for your direct reports.

Navigating to Journal Entries

There are several ways to log Journal Entries in Perform. They can be created from the Quick Actions from the **Dashboard,** from the employee **Profile,** and from the Journal Entry button or Journal Hub from the **Performance** page.

Adding Journal Entries via the Dashboard

From the Dashboard, click on Write a Journal Entry from the Quick Actions section.

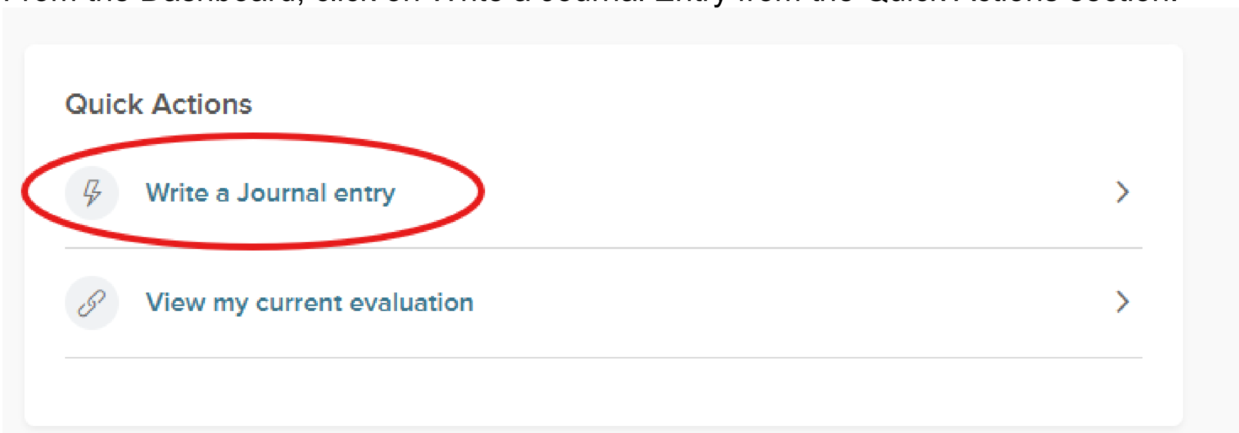

Figure 10: Journal Entry

This will directly navigate you to the **Performance** page with a **Write a Journal Entry** flyout.

1. **Who is this entry about?:** Search for any direct reports you would like to create a Journal Entry for, including yourself.
2.

Figure 11: Selecting Entry Name

Once you've selected a name, a text box will appear.

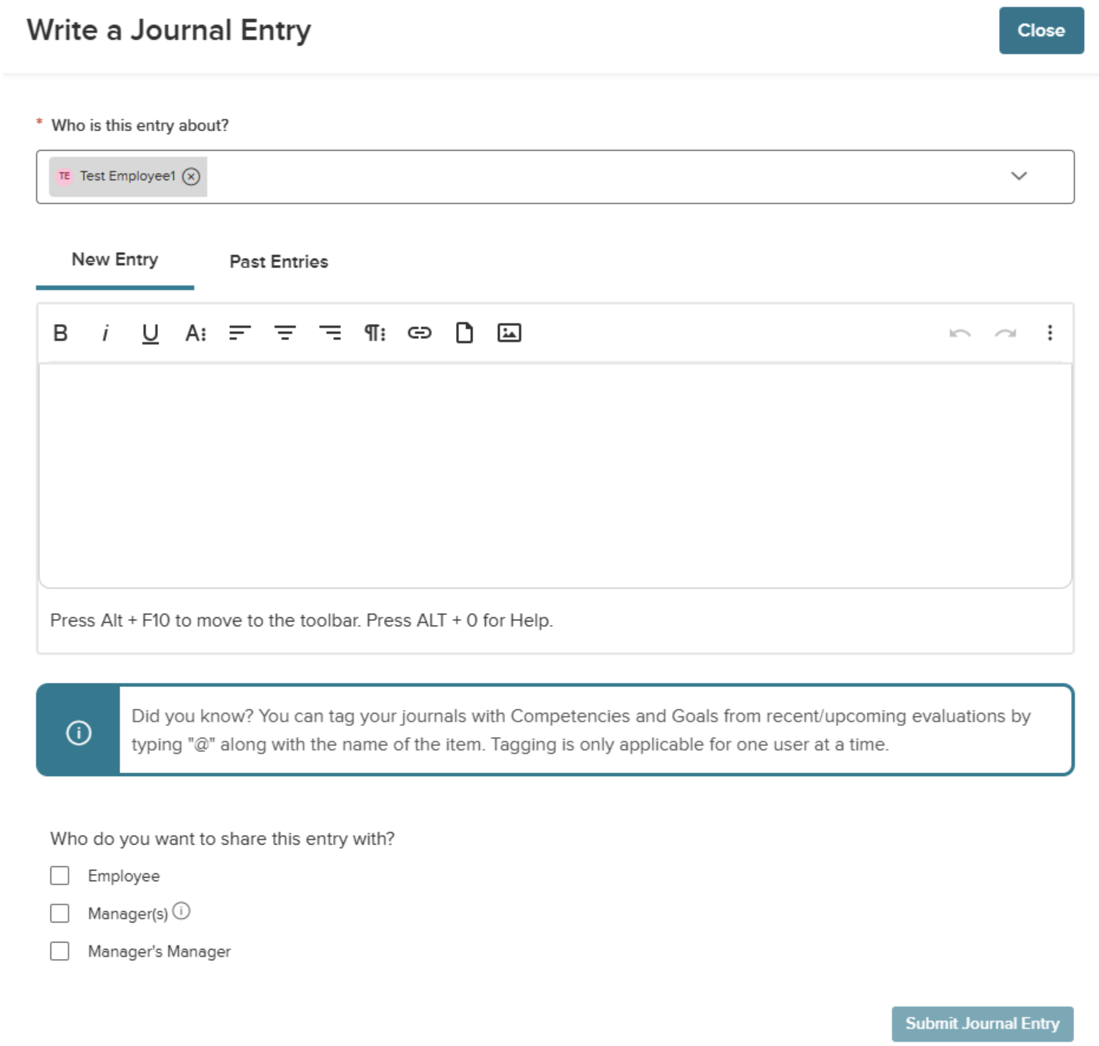

Figure 12: Write a Journal Entry

1. **New Entry:** In this box you will type your new journal entry.
    a. The rich text editor can be used for additional formatting and one (1) attachment can be included (5MB)
2. **Past Entries:** Under this tab will be all past entries that you saved and/or were shared with you.
    a. To **Archive** a Journal Entry, select **Past Entries** from the Write a Journal Entry flyout, and click the three dots to the left. Select Archive. Using this feature removes older journal entries from view, making it easier to search through current feedback entries
        i. Once archived, the entry moves from your current list to the archived list. The archived entry no longer appears for selection in the rating form.
    b. To **unarchive**, select the unarchived icon.
    c. To **delete** any entries you created, select the Trash Icon
    d. To **edit** your entry, select the Pencil icon.

3. **Who do you want to share this entry with?**: Select any combination of options to quickly share the entry upon submitting with the:
    a. Employee
    b. Manager(s)- NOTE: if there are any Additional Managers assigned to the Employee, the journal entry will be shared with them as well
    c. Manager's Manager: Supervisor's Manager
    d. Not selecting an option keeps the Journal private to the creator- NOTE: HR administration has access to view ALL journal entries, even private entries.
4. **Submit Journal Entry**: Select to post the Journal Entry

5. Perform continuously saves your work as a **Draft** while you type. You can select to **Keep it as Draft** and come back to it later, or **Discard Draft**.

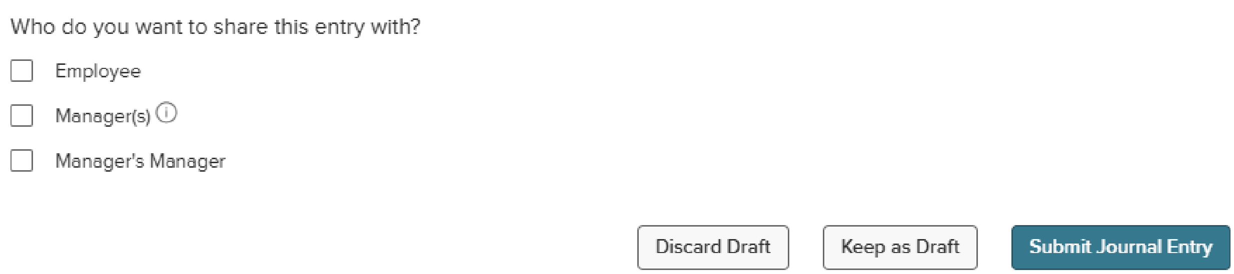

Figure 13: Share Journal Entry

Adding Journal Entries via the Employee Profile

Select the **People** page from the left-side menu. Select direct report from the My Team page, or type the name into the right-hand search bar.

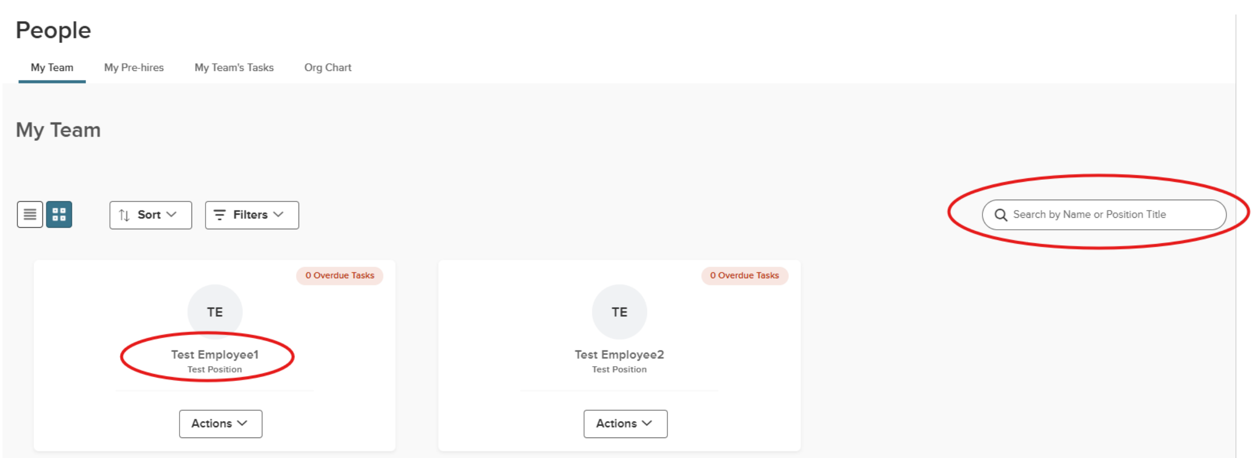

Figure 14: Adding Journal Entry

Click on the employee's name. It will take you to their Profile page. From the Actions menu on the far right, select **Write Journal Entry**.

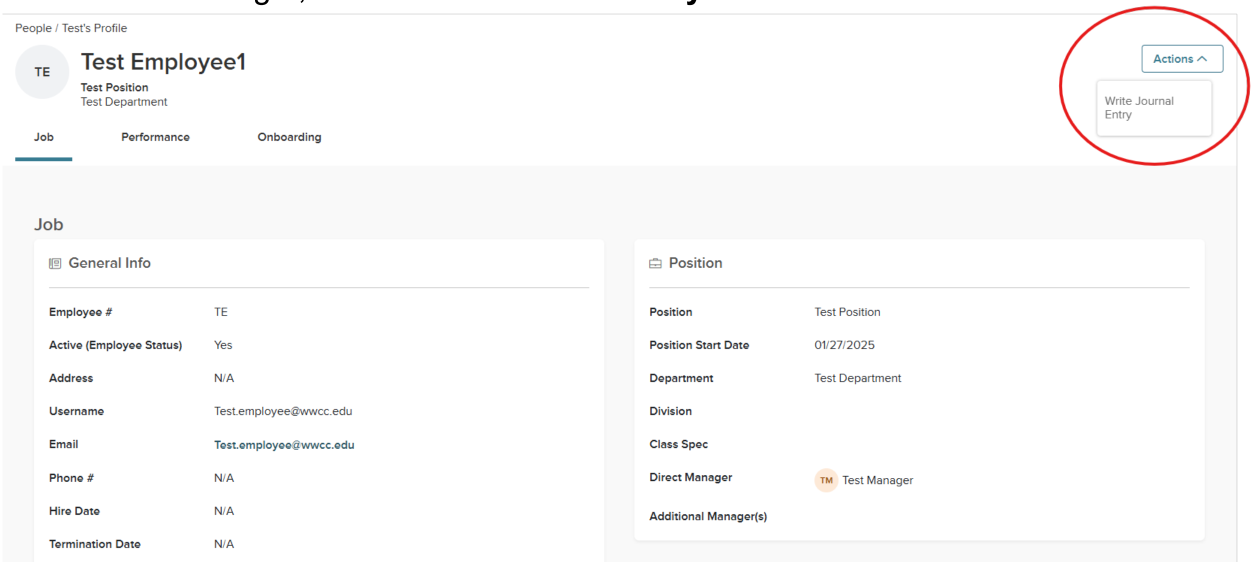

Figure 15: Write Journal Entry

Follow the remaining steps from the **How to Write a Journal Entry** section.

Adding Journal Entries via the Performance Page

Select the Performance page from the left menu, and click on the Journal Entry button in the upper right-hand corner of the page.

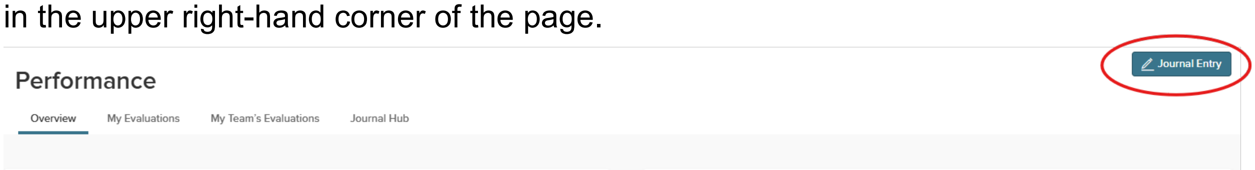

Figure 16: Adding Journal Entry

Follow the remaining steps from the **How to Write a Journal Entry** section.

Managing Journal Entry Drafts

Users with access to create Journal Entries can save any in-progress entry as a draft to be completed later. The system will auto save all entries as a draft upon typing in the Rich Text Editor until the finalized entry is submitted.

This prevents the accidental loss of entries should the user experience any technical difficulties or accidentally close out of the Journal feature prior to saving. To finalize any draft and submit as a Journal Entry select the **All Drafts** tab from the **Journal Hub** within the **Performance** page.

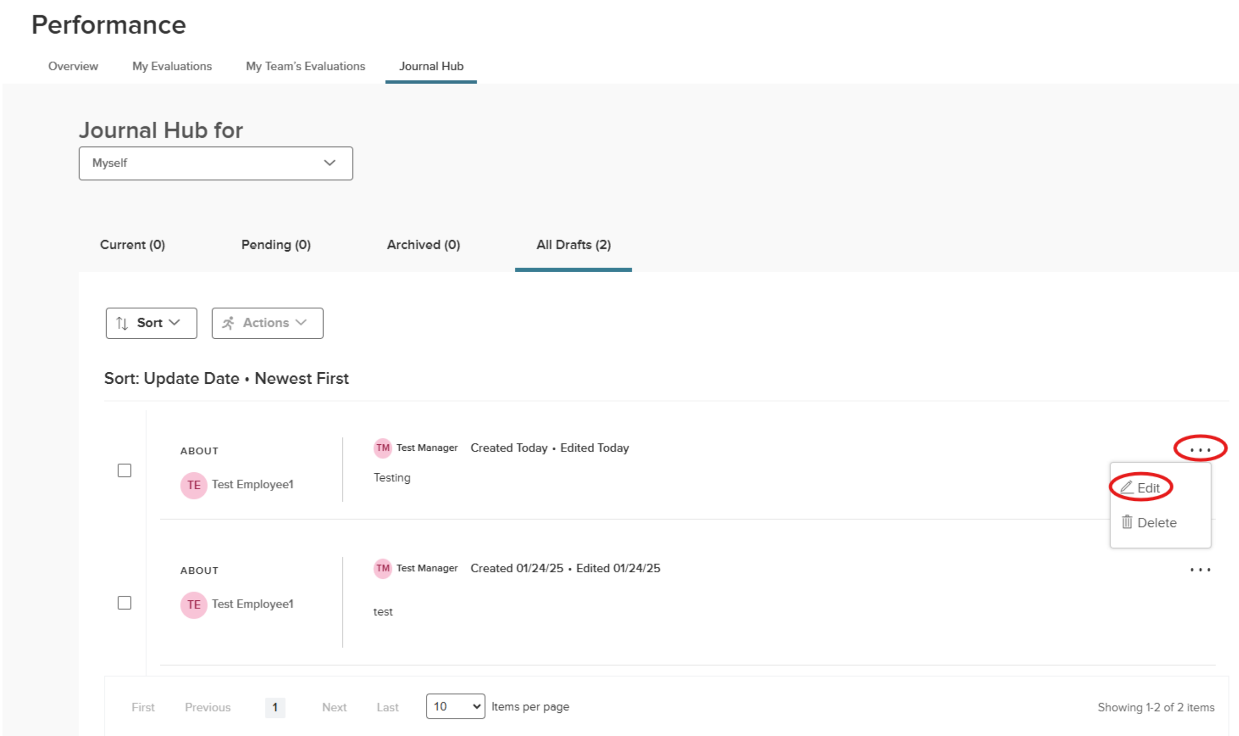

Figure 17: Managing Journal Entries

1. Select the three (3) dots off to the right-hand side and select Edit or Delete.
2. Entries can be deleted in bulk using the check boxes and Action button.

If existing Journal Entries are edited, the User can choose to keep the in-progress version as a draft. In this instance the original saved entry remains visible until the draft is submitted as a finalized entry. Click on **View Draft** to see the in-progress draft of the saved Journal Entry, finalize, and submit.

Once the Draft is submitted, the original entry is replaced, and the edited time stamp is updated.

The Evaluation Process

Human Resources will assign every existing or new employee to the corresponding evaluation program. Evaluations will be based on the employee's hire date.

6-month Check-in

Every 6 months, you and your direct reports will have a check-in meeting and complete the **6-Month Check-in Form**. During this meeting you will:

1. Review current goals
2. Reflect on accomplishments
3. Realign objectives
4. Discuss areas of improvement

The goal for this meeting and check-in form is to be in regular contact with your direct report about these areas as they will be rated on during their yearly evaluation.

During this same meeting, you as the Supervisor, should discuss goals that can be added to the upcoming evaluation. Please view the section **Goals**, for instructions on how to add these goals prior to the launch of the evaluation.

Supervisor and Employee Meeting to Discuss Evaluation Steps
Fifty (50) days before the evaluation due date, you will receive a task to schedule a meeting between yourself and your direct report to discuss the evaluation steps and to decide who you'd like to participate in the **Peer Feedback Survey**.

Issue Peer Feedback Survey
Forty (40) days before the evaluation due date, HR will issue the **Peer Feedback Survey.**

Employee's Self-Rating
Thirty (30) days before the evaluation due date, the employee's self-rating (or self-evaluation), will be available to the employee to complete.

Supervisor's Rating
Fifteen (15) days before the evaluation due date, or whenever the employee's self-rating is complete, the Supervisor will be able to complete the employee's evaluation.

HR's Approval and Signature
Once the Supervisor approves and signs the evaluation, it will be released to the HR Administration for approval and signature. Once complete, the evaluation will be released to the employee.

Supervisor and Employee Meeting to Discuss Evaluation
After HR Administration's approval and signature, the Supervisor will schedule a meeting with their direct report in order to review the evaluation's results.

Employee's Signature or Denial
Once the Supervisor and Employee's meeting is complete, the employee will sign or deny the evaluation.

Vice President's Review and Signature
Once the employee signs or denies to sign the evaluation, it will go to the area's Vice President for review and signature.

Evaluation is Complete
The evaluation is now complete, and available to view from the employee's Performance page and/or under the Performance tab from the employee's Profile.

Goals

Each year Supervisors will be able to add goals to their employee's upcoming evaluation.

How to Add Goals During 6-Month Check-in

Supervisors will have the option to add the goals discussed during their 6-month check-in, to the employee's upcoming evaluation.

Once the Check-in Form is completed, the Supervisor will receive a new task to add goals to the current evaluation.

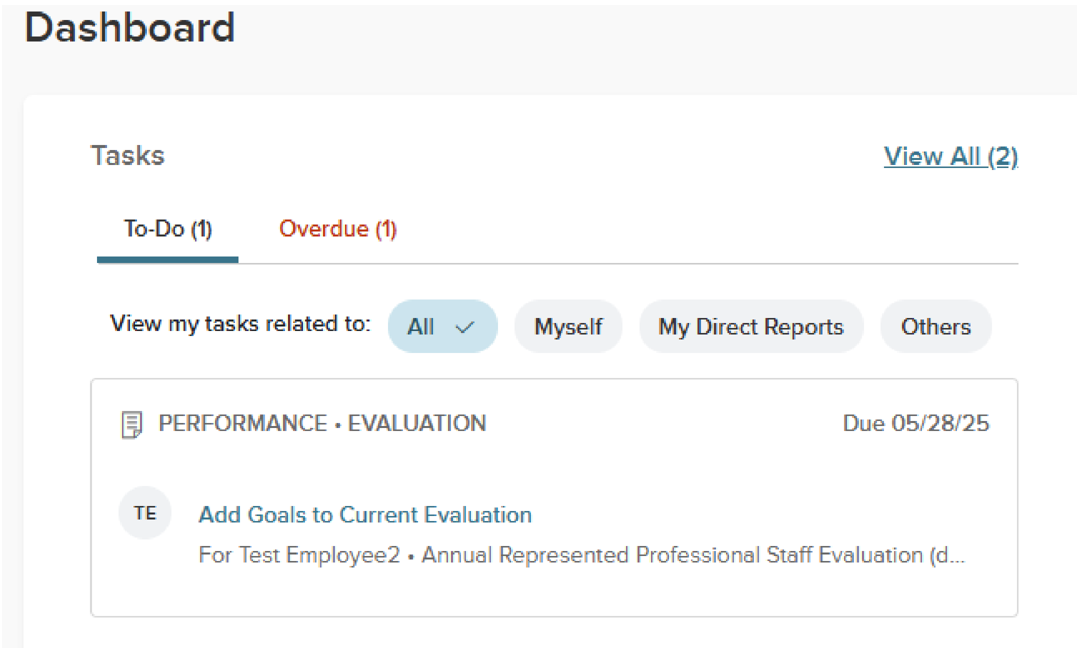

Figure 18: Dashboard

1. Click on the task, to take you to the **Add/Edit Content** page.
2. Click on +Add Goals button.

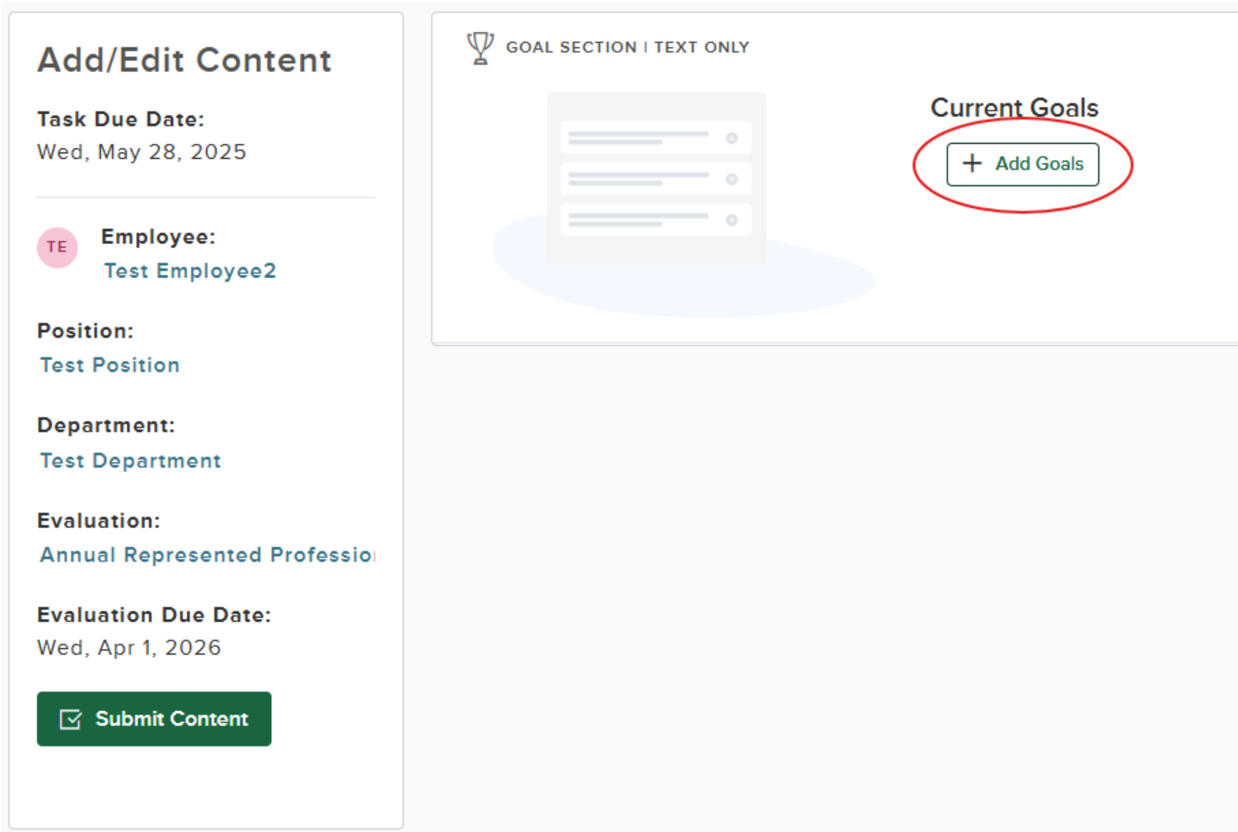

Figure 19: Adding Goals

3. From the drop-down menu you have the option to select one of the following:
    a. From Last Schedule Evaluation
    b. Roll Over Goals from Previous Evaluation
    c. New Goal
4. If choosing a **New Goal,** you will need to:
    a. Add a Goal Name
    b. Add a Goal Due Date (optional)
    c. Select a Category (or add a new Category)
    d. Add a description of the goal
    e. Under Additional Settings you can choose the priority level
    f. Under Reminder Settings you can choose when reminders go out
    g. Click Save

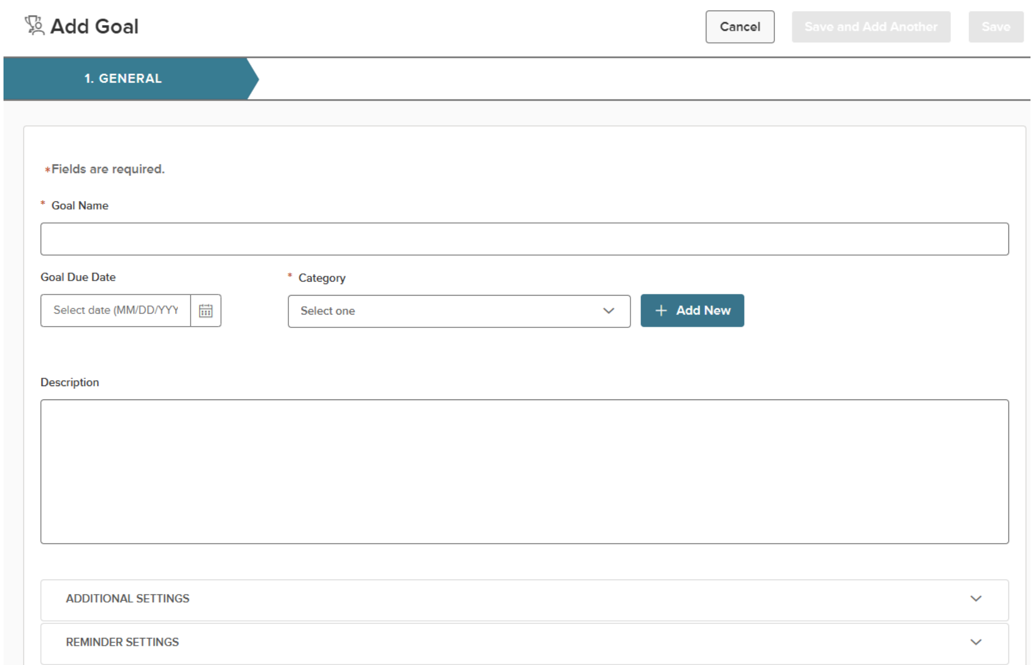

Figure 20: Add Goal Screen

5. Once you've finished adding the goals discussed with your direct report, click on the **Submit Content** button.

NOTE: Once you submit, you will not be able to go back and make changes without help from HR. Make sure you are definitely finished before submitting.

Adding Future Goals During Evaluation

Future goals can be added during the supervisor's rating of their direct report. Once in the Future Goal section, you can select +Add Item and the drop-down menu will display the following options:

1. From Library
2. Roll Over Goals from Current Evaluation
3. New Goal

If adding a New Goal, please refer to the **How to Add Goals During 6-Month Check-in** section for instructions.

Needing to Edit Goals

Once goals are submitted, only HR Administration can edit these goals.

Future Goals can be entered during the evaluation process, and will move to Current Goals once the next evaluation launches.

Rating Your Direct Report's Evaluation

As a supervisor, you will be required to complete a rating/evaluation for your direct reports. This section covers how to rate an evaluation and what tools are available to assist your rating process.

When it is time for your rating of your direct report, you will receive a task, which will show up on your Dashboard tasks.

NOTE: Shared Rating steps for Multiple Managers can only be accessed by 1 manager at a time. The following message appears if another Manager in your step is editing the Rating Form.

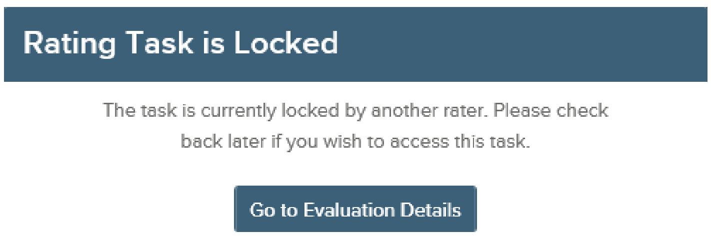

Figure 21: Rating Locked

If no other manager is editing the rating form, then you are then re-directed to the Rating Form.

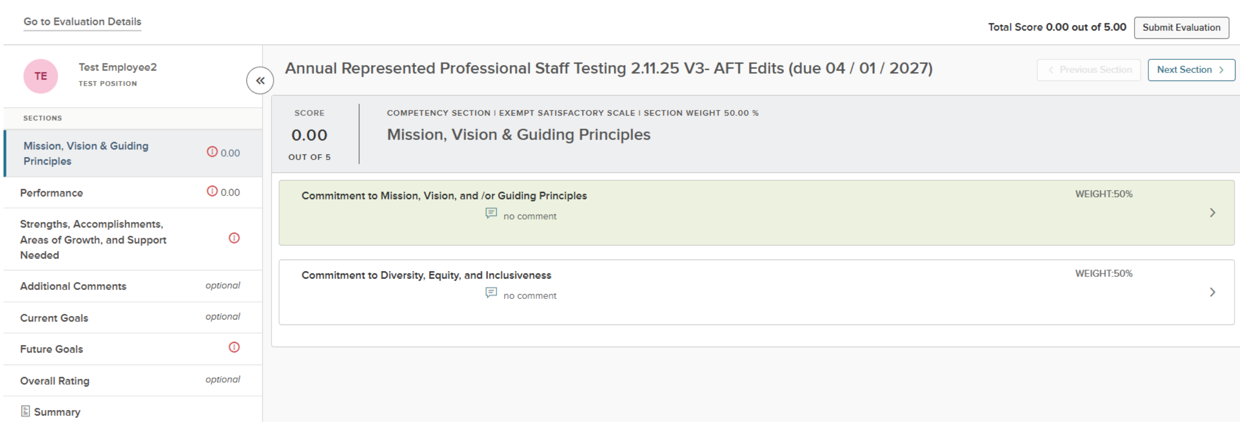

Figure 22: Evaluation Screen

1. To view and rate different items, click on the various sections
2. To rate an item, click an item name, within a section, and a flyout of the Rating Card appears (see below for further information)
3. To leave the rating card and return back to the evaluation detail page, select **back to evaluation detail page**

Upon selecting the item name, the rating card flyout appears.

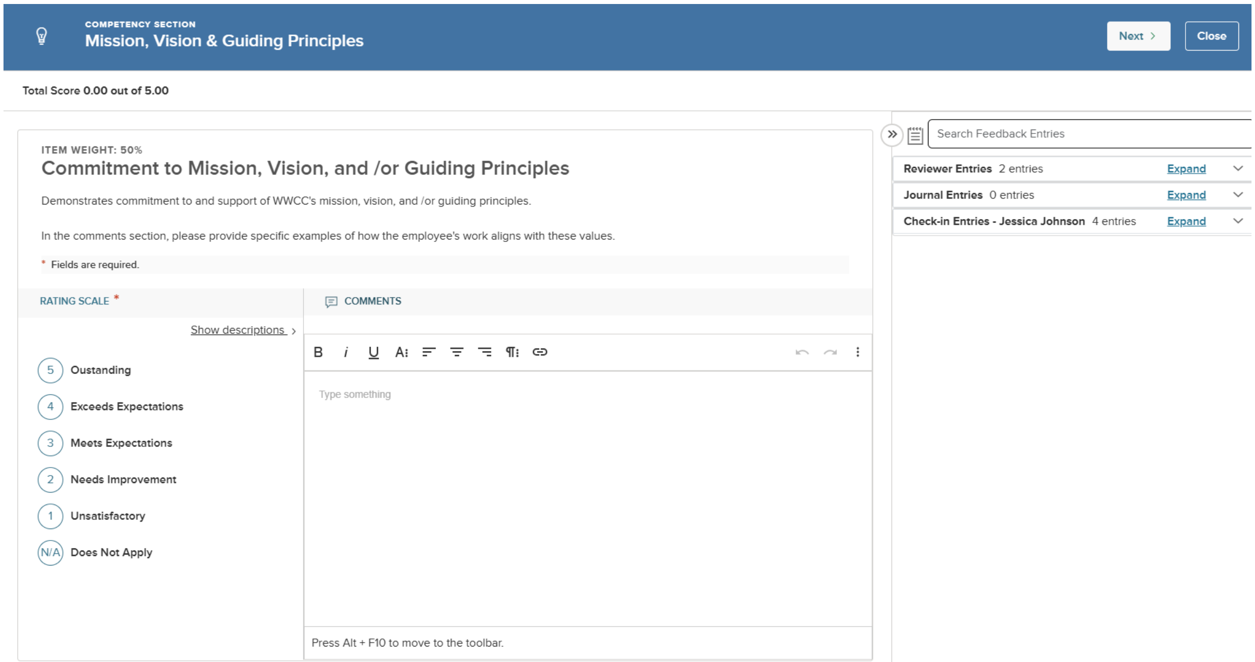

Figure 23: Evaluation Flyout

1. **Rating Scale**: To view a description of each rating scale value, select the Show descriptions button and a flyout appears with detailed information
2. **Comments box**: Edit text using the rich text editor provided
    a. Per HR configuration, if a comment is required the box is highlighted in red
    b. While rating, the system auto saves all progress made
    c. If needed, you may exit out of the rating card and resume rating at a later time
3. The **Feedback Entries** appear on the right side of the rating card. If available, you see **Journal Entries, Check-In Entries, Reviewer Entries**, and **Writing Assistant**. You can copy the feedback entries directly into the comment box by selecting **Add to Comment Box.** To filter for any specific key words, use the *Search Feedback Entries* bar
    a. Any Journal Entries created by you or shared by another employee appear here
    b. If Writing Assistants have been provided by HR, the writing assistant section also appears
    c. If any previous reviews have been made, they appear in the Reviewer Entries section
    d. If Check-Ins are a part of your process, then the check-in comments will appear
    e. To view Job Description, you will need to navigate to the employee's profile page by clicking on the name of the employee in the top left-hand corner, and selecting My Profile. Select the Performance tab and see the job description document under the Performance Documents section.
4. Click **Next** to move to the next step

The Summary Page shows you a high-level overview of all ratings, in a side-by-side comparison.

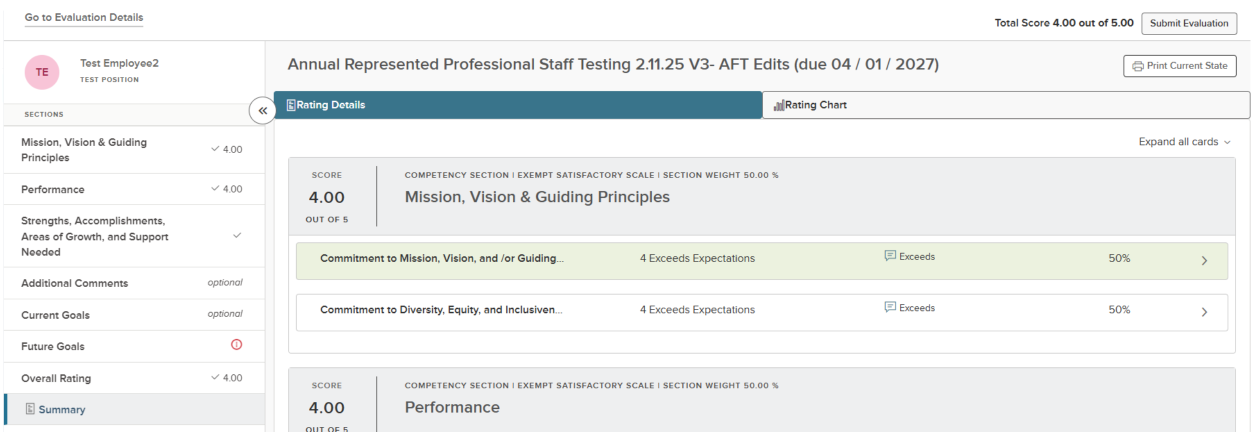

Figure 24: Evaluation Summary

1. Select the Summary section
2. Review the details of the evaluation including your ratings and comments in the Rating Details tab
3. To see a comparison of scores (if numeric scoring is used), view the Rating Chart tab
    a. Select any portion of the graph to see the ratings broken down into each item rated
4. To print the current state of the evaluation, select Print Current State
5. Once you have reviewed the evaluation, select Submit Evaluation

Once all required rating and/or comments are complete, select the Submit Evaluation button in the top right corner.

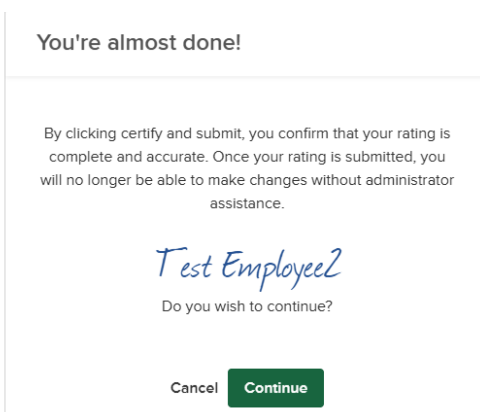

Figure 25: Evaluation Submit

You receive a confirmation message. Once the evaluation is submitted changes can no longer be made without the assistance of HR. If further changes are needed, click Cancel. Otherwise, select Continue.

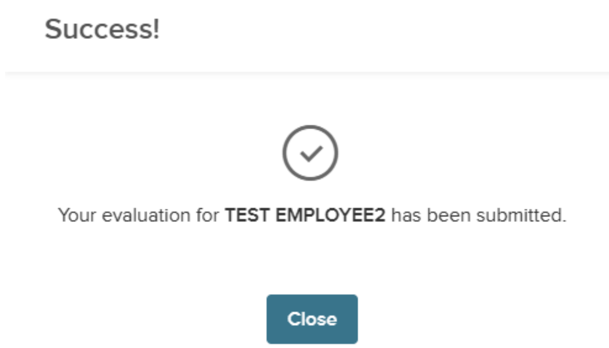

Figure 26: Success Screen

Once your evaluation has been successfully submitted, the next step in the process becomes current.

Approving and Signing an Evaluation

After all Raters have completed their rating, you may need to Approve and Sign the evaluation before it is released to the employee. If you are required approve and/or sign, you will receive an email notification and the task will appear on your dashboard.

When an evaluation is ready for your signature it will appear under your **Tasks**, from the **Dashboard**.

Upon selecting the approval task, the approval page displays.

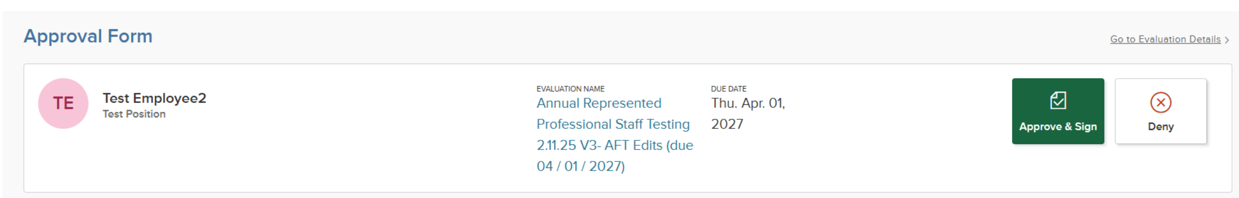

Figure 27: Approve or Deny

1. **Rating Summary**: Displays the overall score and all raters with their respective scores
2. Navigate through the various **Sections** by clicking on the name
   a. Scroll through each section to review the ratings and any comments provided
3. Toggle between the Rating Details or the Rating Chart
   a. The Rating Chart displays a bar graph of all raters
4. Once you have reviewed the evaluation, select **approve & sign**, or **deny**
   a. If deny is chosen, you must enter in a comment, and it will be routed to HR.

NOTE: To make 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, all approvals and signatures are re-trigged.

Once you have reviewed the evaluation and select the **approve & sign** button, a flyout appears.

Figure 28: Signature Screen

Enter in any comments, sign and submit. Once approved, a green success banner appears, and you are re- directed to the evaluation details page.

The evaluation has been successfully approved and signed. An email is generated to the next approver in the process.

Finalizing the Evaluation

Once the Manager and the Employee have both signed, or refused to sign the evaluation, the Vice President of the area will then review and sign the evaluation. Once signed the evaluation will not be visible to both the Employee and Manager under Completed Evaluations for that Employee. A paper copy of the evaluation will be filed in the Employee's personnel file with HR.