

# NEOGOV: Performance Evaluation Basics (Rater of Record)

## When An Evaluation is Ready for Review

1. Access your county email account.
2. Locate the email from [donotreply@neogov.com](mailto:donotreply@neogov.com) that indicates an *Evaluation is Ready for Review*.
3. Open the email and click the link with the title of the evaluation.

[2014-2015 Annual Evaluation for Review Please log into Perform](#)

## Logging on to NeoGov

1. Login to NeoGov. Your username will be your county email address (ex: [bblowfish@co.slo.ca.us](mailto:bblowfish@co.slo.ca.us))
2. Click on Sign In to begin.

**Note:** If you haven't logged onto NeoGov before, you will need to activate your account. Contact your payroll coordinator to request an activation email. You must open the email and activate your account within 24 hours. If you don't, the link may expire, which would require you to make a new request.

3. After logging in, if you have not been taken directly to the employee's evaluation, click **My Profile** from the drop-down menu in the upper left-hand corner, and go to your Dashboard.
4. Find the employee under **My Direct Reports** and bring up their profile. The link to their evaluation is in the Performance Evaluations section.

## Starting the Performance Evaluation

1. On your dashboard, click the employee whose performance evaluation you would like to edit.
2. In the Performance Evaluations section, click the performance evaluation you would like to edit.

3. Click the **Start Evaluation** button
4. When the Activate Evaluation message pops up, click **Continue**.



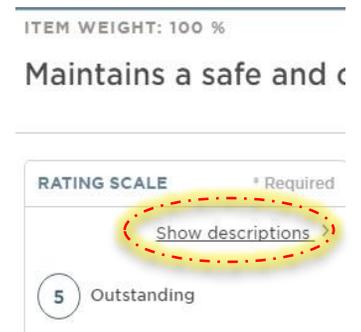
## Begin Your Performance Evaluation

1. Click the **Rate** button.
2. On the left-hand side of the screen, click on the name of the goal or competency to begin rating. Next, click on each subsection that's presented.
3. The evaluation will begin at the first goal or competency with a red exclamation point  next to it. This means that this item has not yet been rated. Green checks  means either that the item has been rated, or that there is no items that needs to be rated.



## Rating Goals

1. To rate an employee's goal, select a goal from the goal subsection.
2. Click **Show descriptions** to familiarize yourself with the rating scale.
3. Once you have chosen a rating for the goal, you can now write a comment.
4. Click the **Reviewers** tab to see who else has rated the evaluation, and any available information.
5. See the Journal Entries section for information on how to keep track of how the employee is meeting their goals throughout the year. This feature also allows you to import your journal entries directly into Comments (optional).
6. Click **Next** in the top right corner of the screen to rate the next goal or competency.



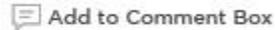
The Evaluation Cycle

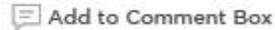


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## Rating Competencies

1. Click **Show descriptions** to familiarize yourself with the rating scale.
2. Click the **Writing Assistant** tab to view rating guidelines.
3. Click on a rating button to select a rating.

 Add to Comment Box

4. Click  to import Writing Assistant comments into your Comments (optional).
5. Click the **Reviewers** tab to see who else has rated the evaluation, and any available information.
6. In the comments box, incorporate specific examples that demonstrate how your employee achieved the competency. Read the Journal Entries section for an easy way to log examples in NEOGOV throughout the year then import into your evaluation.
7. A Satisfactory rating does not require a comment.
8. Your work will auto-save as you enter comments. If you leave your workstation or work on something else for a few minutes, log out of NEOGOV and log back in to ensure the system will continue to save your work.
9. Click  to check your spelling inside the comment area.
10. Complete remaining competencies. You can move to the

next competency by clicking  in the upper right-hand corner.

## View/Print Summary and Submit Evaluation

1. Once all the goals and competencies have been rated, you may have the option to recommend the employee for a step increase. Select a rating button.
2. You will see red triangles next to Competencies you still need to complete in the Sections pane on the left.
3. Click  in the upper right-hand corner to enter your overall rating.
4. Click **Done** in the upper right-hand corner to complete the evaluation. You are required to comment, even if the rating is satisfactory.
5. Click **Summary** in the Sections pane on the left to review the evaluation before you submit it.
6. To print a copy of your evaluation before you submit it, make sure you are on the Summary page and click this

 Print Current State

button:  in the upper right-hand corner of the screen.

7. Make sure you include all of your desired information before you click **Submit**. Once you click submit, the only way you can retrieve and edit the evaluation is to ask your Payroll Coordinator to request HR to unlock it.
8. Once you're satisfied with your evaluation, click **Submit Evaluation** and **Continue** to submit your evaluation. This will send a notification email to your first Approver.

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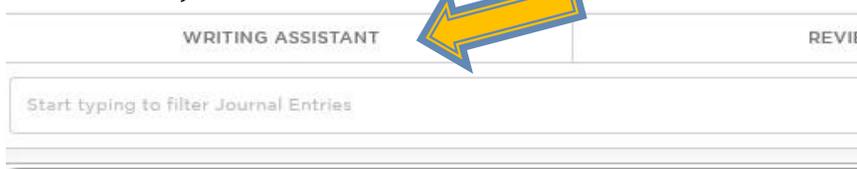
## Journal Entries

1. Throughout the evaluation period, its good practice to add journal entries to your employees' NEOGOV profile so you can track their progress alongside their goals or development plan.
2. From your dashboard, click on the journal button next to the employee you would like to write a journal entry for.
3. Click inside the entry box at the top of the screen to create your journal entry.
4. Be sure to use words in your entry that correspond to specific goals and/or competencies so you can find them easily when you complete an employee's rating.
5. Once you have completed an entry, click Save.
6. You may choose to share it with your supervisor.
7. Hover over the right side of the journal entry so that these



icons    show on the screen. These give you the options to share, delete, or edit your entry.

8. To share your entry, click the blue icon and type the name of the person you would like to share the entry with.
9. To incorporate the journal entry your rating, once you're in the goal or competency section of an evaluation, click on the **Journal Entry** tab in the lower half of the screen.
10. Enter search terms based on the competency or goal (if you used them)



11. Click **Add to Comment Box** to import the entry into your Comments (optional).

## Adding and Deleting Raters

1. Click the Pause Evaluation button, and click Continue.
2. Scroll down to the Process section, Ratings subsection and click the **+ Add Rater** button at the right.
3. In the Rater box, type the name of the person by selecting Other, or select default (Manager's Manager).
4. If the rater is a peer rater, make sure to check the radio box, so that their ratings will not be visible to the employee.
5. Email notifications are not set by default. To enable, click Reminder Settings on the lower half of the screen and enter your notification settings.
6. Enter any other settings as necessary and click **Save**.



## Questions?

1. Access online training at [http://www.slocounty.ca.gov/hr/NEOGOV\\_Training/Managers.htm](http://www.slocounty.ca.gov/hr/NEOGOV_Training/Managers.htm).
2. For further questions, e-mail **your payroll coordinator** or contact the IT Service Desk.