

# NEOGOV PE: Basics for PYCs

## Login to NeoGov PE

1. Go to <http://login.neogov.com>
2. Your username will be your county email address (ex: [bblowfish@co.slo.ca.us](mailto:bblowfish@co.slo.ca.us))
3. Click on **Sign in** to begin

## Activating an Evaluation

1. Click the Performance Evaluations drop-down menu at the top of the page
2. Click  above the table to the right
3. Click **Enable Bulk Actions**
4. Click the box in the far left column next to the evaluation(s) you wish to activate
5. Click 
6. Click Start Review/Draft Status
7. This changes an evaluation from Draft to Not Started status; this action enables the evaluation process to begin

## Opening the Evaluation

1. Click on Employees at the left-hand side of the menu at the top of the page
2. Enter the last name of the employee who needs an evaluation in the Last Name search box
3. Click on the employee ID or name to open the Employee Detail page
4. Look at the second section down titled **Performance Evaluations**. You should see the specific evaluation in the list.

5. Click the link in the column titled “Evaluation Name.”

## Adding and Re-Ordering Approvers

1. Make sure your evaluation is in Draft mode (Pause Evaluation has been clicked)
2. Click



3. Click the Process link in the Evaluation Detail section



4. At the top-right side of the After Ratings section, click the **+Add Step** button
5. For Title, enter “Approval” or “Approval & Signature”
6. Complete the other settings and click **Save**
7. To re-order your approvers, click the 3 vertical dots to the left of the name and drag to desired location
8. Look at the list of Approvers and ask yourself: Are these all the right people?
  - a. To delete an approver, click the trash can to the right in the same line as his or her name
  - b. Make sure that the final two approvers are Manager as Signature type and Employee as Signature type



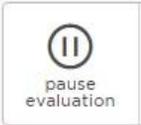
**Note:** If you see error messages at the due dates, you can re-order your approvers into chronological order or change the due dates to rectify this problem

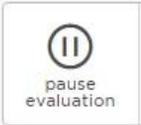
The Evaluation Cycle



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## Changing an Evaluation Due Date

1. Once an evaluation has started, you may need to edit it. Begin editing by clicking  in the top Evaluation Detail section.



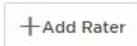
2. In many cases, you will only need to change a due date of an evaluation because of extended probation or leave without pay. To do this, open the evaluation from the Performance Evaluations drop-down menu. In the General section, click the pencil next to the Due Date to edit. Be sure to click the Save button after changing.

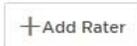
**Note:** You can still edit an evaluation even if someone has begun to rate it

## Adding a Self/Peer Rater

1. Click the Pause Evaluation button.
2. Make sure the Use Wizard Editor button has been clicked.



3. Click Process section, Ratings subsection and click the  button.



4. Type the name of the employee to be added in the Rater: Other box or select default (Manager's Manager).
5. Make other adjustments as desired and click the Save button.

**Note:** Email notifications are not set by default. If you would like to enable them, please click  and set as desired.



## Create & Set Up a Performance Evaluation

1. Locate the employee that needs to have a performance evaluation by clicking Employee and searching for them in the search fields.
2. Review the performance evaluations assigned to the employee and if one is not created, click on the + (plus sign) at the top of the Performance Evaluations section.
3. All evaluations must be named with the following format:

[Year][Type] Performance Evaluation

**Note:** [Type] includes: Probationary, Interim, Annual or Special

4. Click the blue **Custom** button in Evaluation Options
5. Select the correct Evaluation Program. Some departments, such as Sheriff and District Attorney, have their own evaluation styles. The first number refers to number of months in the probationary period. Entry step 1 or adv step refers to the step at which the employee started their current position.

**Note:** Please contact your department's HR analyst aid for assistance in picking the correct Program if needed

6. Click 

