

NEOGOV: PERFORM TRAINING

DIVISION OF ADMINISTRATIVE
SERVICES



AGENDA

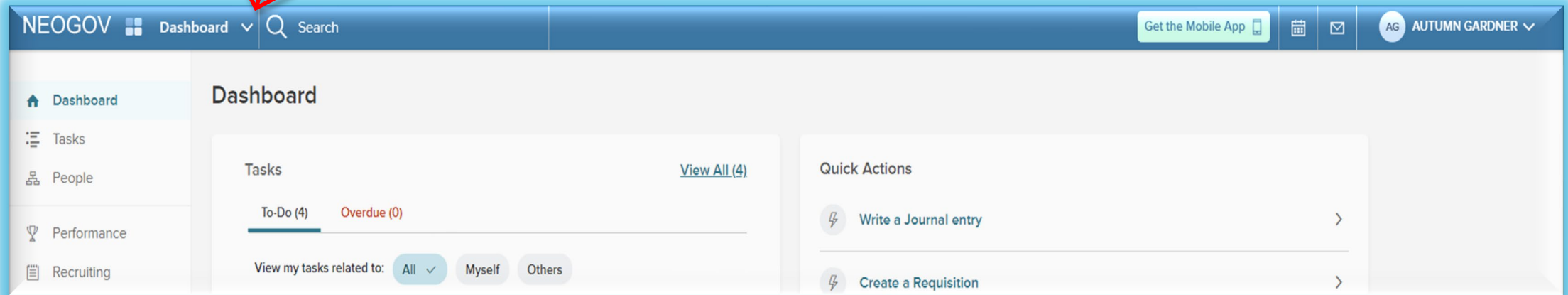
- **Entering New Employee Information**
- **Changing Position Numbers**
- **Terminating Employees**
- **Terminating Supervisors**
- **Accessing EPA Reports**
- **Types of Evaluations**
- **Making Changes to Employee's EPA**
- **EPA – Legal Holds**
- **References**
- **Contact Info**
- **Questions**

**ENTERING NEW
EMPLOYEE INFORMATION
IN PERFORM**

4

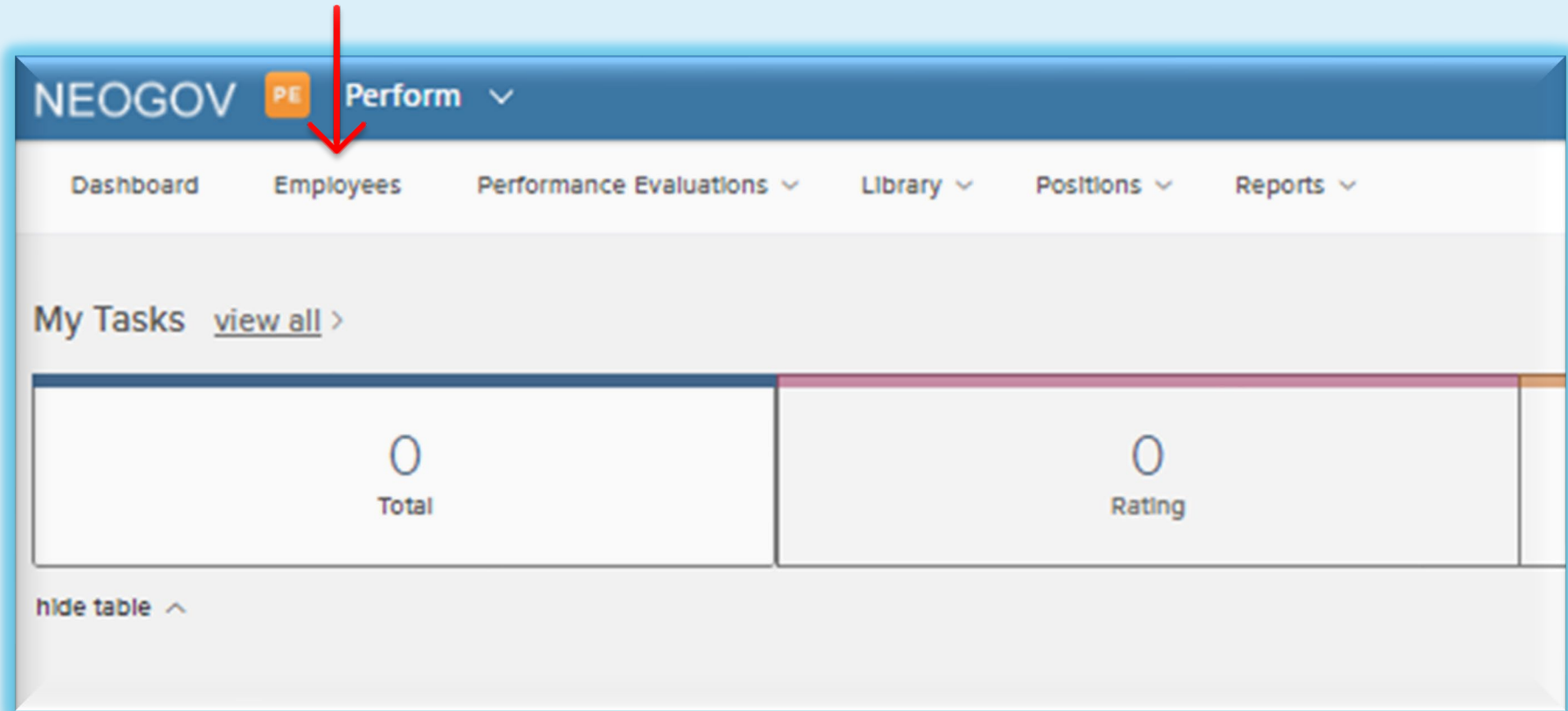
Navigate in your web browser to <https://www.neogov.com/> and sign in.

To access employee's profile, navigate to the **Perform** section.

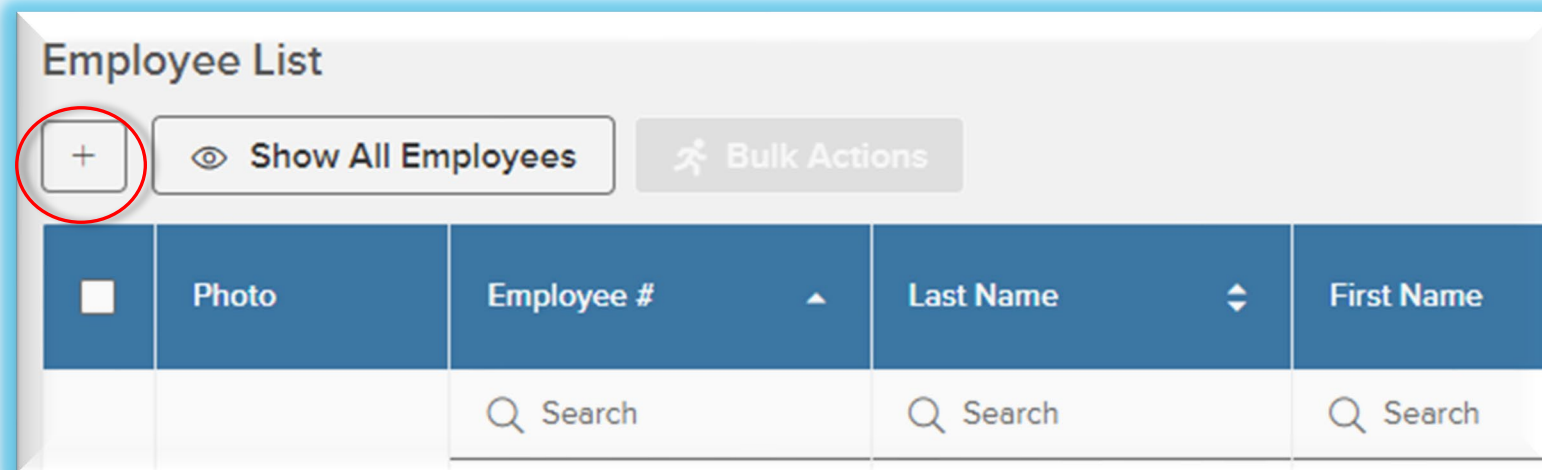


5

In Perform, select Employees



- 6 Begin adding a new employee manually by selecting the “+” button in the upper left of the table.



Temporary employees should never be entered into NeoGov.

This screen will appear

7

Fill out all fields that have an asterisk (*)

The screenshot shows a web form for entering employee information. At the top left, there is a profile picture placeholder and an "Upload photo" button. The form is organized into several sections:

- Employee Info:** Contains fields for First Name, Middle Name, Last Name, Employee Number, and Position. The Position field has a "Choose Position" button and a link to "Add new".
- Direct Manager:** A dropdown menu with "Select" as the current option.
- Additional Manager(s):** A dropdown menu with "Select" as the current option and a link to "Add up to 5 additional managers".
- Hire Info:** Contains fields for Hire Date, Separation Date, Position Start Date, and FTE (Full-Time Equivalent). The FTE field has "1.00" entered.
- Contact Info:** Contains fields for Country, Address 1, Address 2, City, State/Province, Zip/Postal, Phone, and Email.

Asterisks (*) are placed next to the following fields: First Name, Middle Name, Last Name, Employee Number, Position, Direct Manager, Additional Manager(s), Hire Date, Separation Date, Position Start Date, FTE, and Email.

Always enter information in all CAPS

8

Enter
Employee
Number
including
all zeros

The screenshot shows a web form titled "Employee Information". It contains several input fields and a button. A callout box at the top center says "Enter employee's First Name then Last Name". Red arrows point from this box to the "First Name" and "Last Name" input fields. Another red arrow points from the left text to the "Employee Number" input field. A third red arrow points from the bottom text to the "Choose Position" button. The form includes a "Fields are required." warning, a "Middle Name" field, and a "Position" dropdown menu with a "Choose Position" button and an "Add new" link.

Enter employee's
First Name then
Last Name

Select **Choose Position**

9

Position information will auto-populate once position has been selected.

Search position number by **Position Code**

	Position Code	Position Title	Department C...	Department
	<input type="text" value="0623p000"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
<input type="checkbox"/>	0623P00008	ADMINISTRATIV...	0623	DHS - Division of...
<input type="checkbox"/>	0623P00009	ADMINISTRATIV...	0623	DHS - Division of...
<input type="checkbox"/>	0623P00018	ACCOUNTING T...	0623	DHS - Division of...

First Previous **1** Next Last Items per page

10

Select Position

Select Save

← Back to Employee Information

Choose Position

1 record(s) are selected.

	Position Co... ▲	Position Title ▼	Departmen... ▼	Department ▼	Division Co... ▼
	Q 0623P00 X	Q Search	Q Search	Q Search	Q Search
<input checked="" type="checkbox"/>	0623P00702	PROCUREME...	0623	DHS - Division...	

First Previous 1 Next Last 10 ▼ Items per page



Never select "Add new," contact DAS if position is not listed

11

Search and select the employee's **Direct Manager**

The screenshot shows a web form with the following fields and callouts:

- Direct Manager:** A dropdown menu with "Select" and a downward arrow. A red arrow points to it from the callout box above.
- Hire Info:** A section header.
- Hire Date:** A date selection field with "Select Date" and a calendar icon. A red arrow points to it from the callout box to its right.
- Position Start Date:** A date selection field with "Select Date" and a calendar icon. A red arrow points to it from the callout box to its right.
- FTE:** A text input field containing "1.00". A red arrow points to it from the callout box to its right.
- Separation Date:** A date selection field with "Select Date" and a calendar icon.
- Additional Managers:** A second dropdown menu with "Select" and a downward arrow, with the text "Add up to 5 additional managers" below it.

Add Hire Date

Add Position Start Date

FTE should always be 1.00

Never list additional managers, only 1 manager should be listed.

12

Do not enter employee's address – leave blank

Contact Info

Country ~~X~~

Address 1 ~~X~~

Address 2 ~~X~~

City ~~X~~ State/Province Zip/Postal ~~X~~

13

Enter employee's State assigned email address

Phone

• Email

john.a.doe@wv.gov

Online Access User Account

Send Account Activation Email

Cancel Save

Online Access User Account, **Send Account Activation Email** should be selected

Select Save

14

Where can the new hire's NeoGov activation link be found?

The activation link is sent to the new hire's email.
(Activation link may go to Spam folder)



ENTERING NEW
EMPLOYEE
INFORMATION IN
PERFORM

TRUE OR
FALSE

16

Employee's name should be entered in all CAPS.

True

False

17

**The employee's name should be in
entered in all CAPS.**



18

Use an asterisk (*) when entering an employee number.

True

False

19

Do not use an asterisk (*) when entering an employee number. Always input all 10 digits (including zeros).

0000012345

20

Employee's information should be entered during the first month of employment.

True

False

21

Employee's information should be entered into NeoGov during orientation.



22

Temps should never be entered in
NeoGov.

True

False

23

**Only full-time/permanent employees
should be entered into NeoGov.**



24

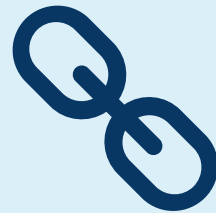
Activation link should be used within 72 hours of entering employee information in NeoGov.

True

False

25

Activation link will expire after 24 hours of entering the employee information.



CHANGING POSITION NUMBERS IN PERFORM

27

When does an employee change position numbers?

Every time they move into a new position.

With the exception of moving through the CO1-CO3 or CC1-CC2 series.

28

Search for employee, either by **Employee #** or **Employee Name**

The screenshot shows the NEOGOV PE Perform interface. At the top, there is a navigation bar with 'NEOGO' and 'PE Perform'. Below this is a menu with 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Positions', and 'Reports'. The main content area is titled 'Employee List' and contains a table with columns: Photo, Employee #, Last Name, First Name, Direct Manager, and Position. The table has search filters for each column. Red arrows point to the 'Employee #' and 'Last Name' columns, indicating search capabilities. The table shows one employee: 0000164531, GARDNER, AUTUMN, SHARON HAYES, HUMAN RESOURCES GENERALIST 1. The footer shows pagination controls: First, Previous, 1, Next, Last, and a dropdown for '10 Items per page'.

Photo	Employee #	Last Name	First Name	Direct Manager	Position
	0000164531	GARDNER	AUTUMN	SHARON HAYES	HUMAN RESOURCES GENERALIST 1

AG **AUTUMN GARDNER**
HUMAN RESOURCES GENERALIST 1 | DHS - Division of Administrative Services

Employee Details | Evaluations | Tasks | Development Plans | Documents

Employee Details

Employee Information

EMAIL AUTUMN.R.GARDNER@WV.GOV	EMPLOYEE NUMBER 0000164531	ONLINE ACCESS Activated
HIRE DATE 06/18/2022	POSITION START DATE 11/18/2023	
POSITION TITLE HUMAN RESOURCES GENERALIST 1	DEPARTMENT DHS - Division of Administrative Ser...	DIVISION
CLASS SPEC Human Resources Generalist 1	DIRECT MANAGER SHARON HAYES	ADDITIONAL MANAGER(S) -
ADDRESS -	PHONE NUMBER -	ACTIVE Yes

Hierarchy

- AG
- SH SHARON HAYES
ADMINISTRATIVE SERVIC...
- AG You
HUMAN RESOURCES GE...

[View Company](#)

Select Edit, (pencil) under Employee Information box

30

Select Change Position



A screenshot of a web interface. At the top, there is a dark blue button labeled 'Change Position' and a link labeled 'Add new'. A red arrow points to the 'Change Position' button. Below this is a table with the following data:

POSITION INFO	
Position	(0623PD1571) HUMAN RESOURCES GENERALIST 1
Department	(0623) DHS - Division of Administrative Services
Division	--
Class Spec	(7984) Human Resources Generalist 1
Position Type	(Full-Time Permanent) Full-Time Permanent
Bargaining Unit	--

31

Select Position Number

Save

← Back to Employee Information

Choose Position

1 record(s) are selected.

	Position Code	Position Title	Department C...	Department
	623pc0026	Search	Search	Search
<input checked="" type="checkbox"/>	0623PC0026	Director, Office o...	0623	DHS - Division of...

First Previous 1 Next Last 10 Items per page

Save Cancel

Enter employee's new Position Number

Never select "Add new," contact DAS if position is not listed

FACTS

**CHANGING
POSITION
NUMBERS IN
PERFORM**

33

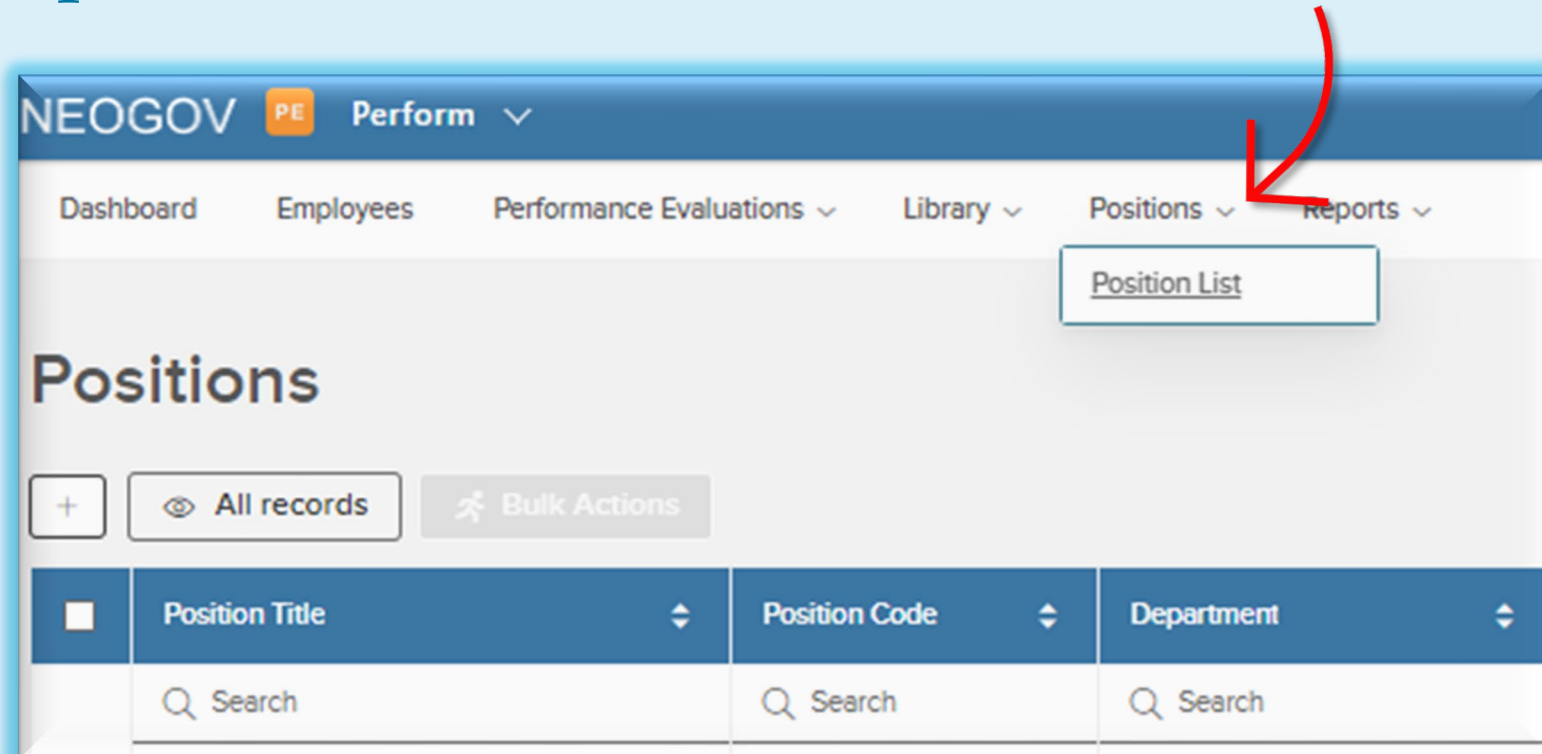
When changing the Position Number, always remember to change the **Direct Manager**

The screenshot shows a web form with a 'POSITION INFO' section containing the following details:

Position	(0623PD1571) HUMAN RESOURCES GENERALIST 1
Department	(0623) DHS - Division of Administrative Services
Division	--
Class Spec	(7984) Human Resources Generalist 1
Position Type	(Full-Time Permanent) Full-Time Permanent
Bargaining Unit	--

Below this section is a 'Direct Manager' dropdown menu. A red arrow points to the selected name 'SHARON HAYES' in the dropdown. The dropdown also includes a close button (X) and a downward arrow (v).

34 Position titles for Correctional Officer's (1-3) and Correctional Counselor's (1-2) are interchangeable and can be updated in Perform under the **Positions** tab.



TRUE OR
FALSE

CHANGING
POSITION
NUMBERS IN
PERFORM

36

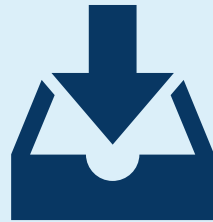
If a position number cannot be found in NeoGov, you can create a new one in Perform.

True

False

37

Never enter a new position number; if a position number cannot be located, contact DAS.



38

A position number can be assigned to multiple employees.

True

False

39

A position number can only be assigned to one employee at a time.



40

The facility will make the necessary changes in NeoGov when an employee is reallocated or promoted.

True

False

41

The facility HR is responsible for updating position changes.



TERMINATING EMPLOYEES IN PERFORM

43

Search for employee, either by **Employee #** or **Employee Name**

The screenshot shows the NEOGOV PE Perform interface. At the top, there is a navigation bar with 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Positions', and 'Reports'. Below this is the 'Employee List' section. It features a search bar with a plus icon, a 'Show All Employees' button, and a 'Bulk Actions' button. The table below has columns for Photo, Employee #, Last Name, First Name, Direct Manager, and Position. The first row shows a search filter for 'gardner' in the Last Name column and 'autumn' in the First Name column. The second row shows a search filter for '0000164531' in the Employee # column. The third row shows a search filter for 'SHARON HAYES' in the Direct Manager column. The fourth row shows a search filter for 'HUMAN RESOURCES GENERALIST 1' in the Position column. The table is currently displaying one record: Employee # 0000164531, Last Name GARDNER, First Name AUTUMN, Direct Manager SHARON HAYES, and Position HUMAN RESOURCES GENERALIST 1. At the bottom, there is a pagination control showing '1' of 1 items per page.

Photo	Employee #	Last Name	First Name	Direct Manager	Position
	Q Search	Q gardner X	Q autumn X	Q Search	Q Search
<input type="checkbox"/>	AG 0000164531	GARDNER	AUTUMN	SHARON HAYES	HUMAN RESOURCES GENERALIST 1

AG **AUTUMN GARDNER**
HUMAN RESOURCES GENERALIST 1 | DHS - Division of Administrative Services

Employee Details | Evaluations | Tasks | Development Plans | Documents

Employee Details

Employee Information

EMAIL AUTUMN.R.GARDNER@WV.GOV	EMPLOYEE NUMBER 0000164531	ONLINE ACCESS Activated
HIRE DATE 06/18/2022	POSITION START DATE 11/18/2023	
POSITION TITLE HUMAN RESOURCES GENERALIST 1	DEPARTMENT DHS - Division of Administrative Ser...	DIVISION
CLASS SPEC Human Resources Generalist 1	DIRECT MANAGER SHARON HAYES	ADDITIONAL MANAGER(S) -
ADDRESS -	PHONE NUMBER -	ACTIVE Yes

Select Edit (pencil) under Employee Information box

SHARON HAYES ADMINISTRATIVE SERVIC...
AG You HUMAN RESOURCES GE...
View Company

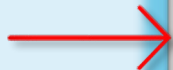
45

Scroll down and remove the **Direct Manager** from the Employee's Profile

POSITION INFO	
Position	(0623PD1571) HUMAN RESOURCES GENERALIST 1
Department	(0623) DHS - Division of Administrative Services
Division	--
Class Spec	(7984) Human Resources Generalist 1
Position Type	(Full-Time Permanent) Full-Time Permanent
Bargaining Unit	--

Direct Manager

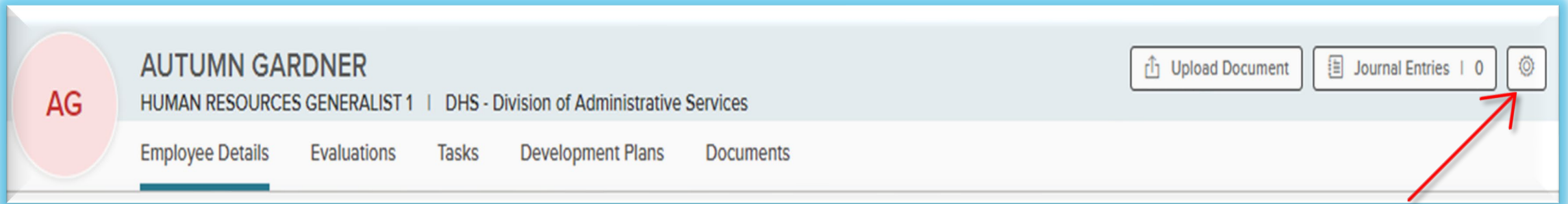
SHARON HAYES ×



Remember to
select **Save**



47



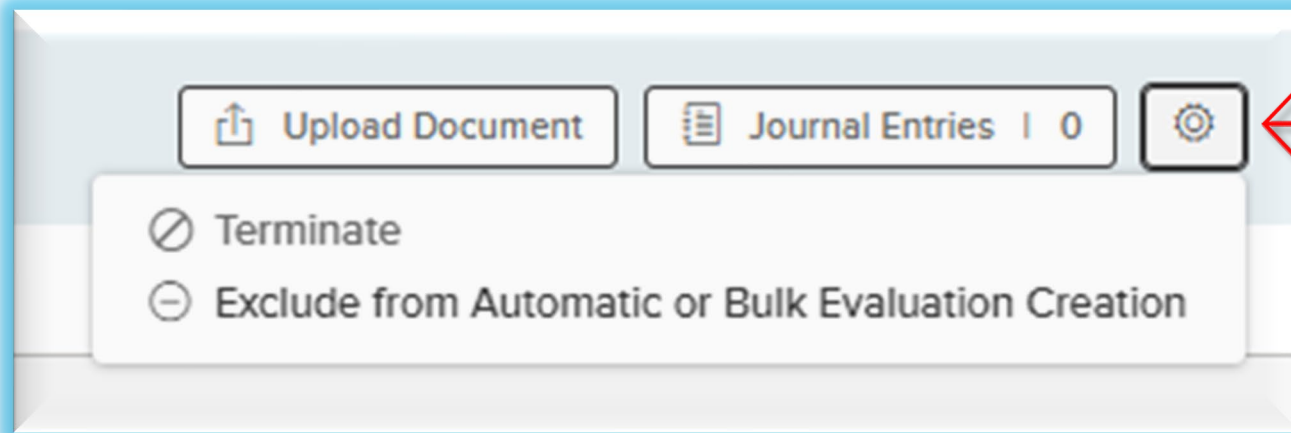
AG
AUTUMN GARDNER
HUMAN RESOURCES GENERALIST 1 | DHS - Division of Administrative Services

Upload Document | Journal Entries | 0 | Settings

Employee Details | Evaluations | Tasks | Development Plans | Documents

A red arrow points to the settings gear icon in the top right corner of the header.

Select the settings wheel



Upload Document | Journal Entries | 0 | Settings

- ⊘ Terminate
- ⊖ Exclude from Automatic or Bulk Evaluation Creation

A red arrow points to the settings gear icon, which has opened a dropdown menu.

Select **Terminate**

The screenshot shows a 'Termination Details' form for an employee named Autumn Gardner. The form includes a profile picture, name, and department. A red arrow points to the 'Termination Date' field, which contains '04/01/2024'. Another red arrow points to a checkbox labeled 'Cancel all evaluations and tasks related to evaluations for this employee at the end of their termination date', which is checked. A third red arrow points to the 'Terminate' button at the bottom right. The form also contains a 'Notes about Termination' section with instructions on what happens to tasks and forms upon termination.

Enter Termination Date

Check the box to "Cancel all evaluations and tasks..."

Select Terminate

Notes about Termination

Immediately upon submitting the termination action for the employee:

- All of their current Onboard tasks will be canceled.
- All Onboard forms for which the Archive setting is enabled will be saved as read-only PDFs.

At the end of the employee's termination date:

- All of their current eForms tasks are canceled and eForms related forms are saved as read-only PDFs.
- All non completed Learn courses are dropped, and they will not be considered in course enrollment counts.
- They are unregistered from all Learning plans and removed from

TERMINATING SUPERVISORS IN PERFORM

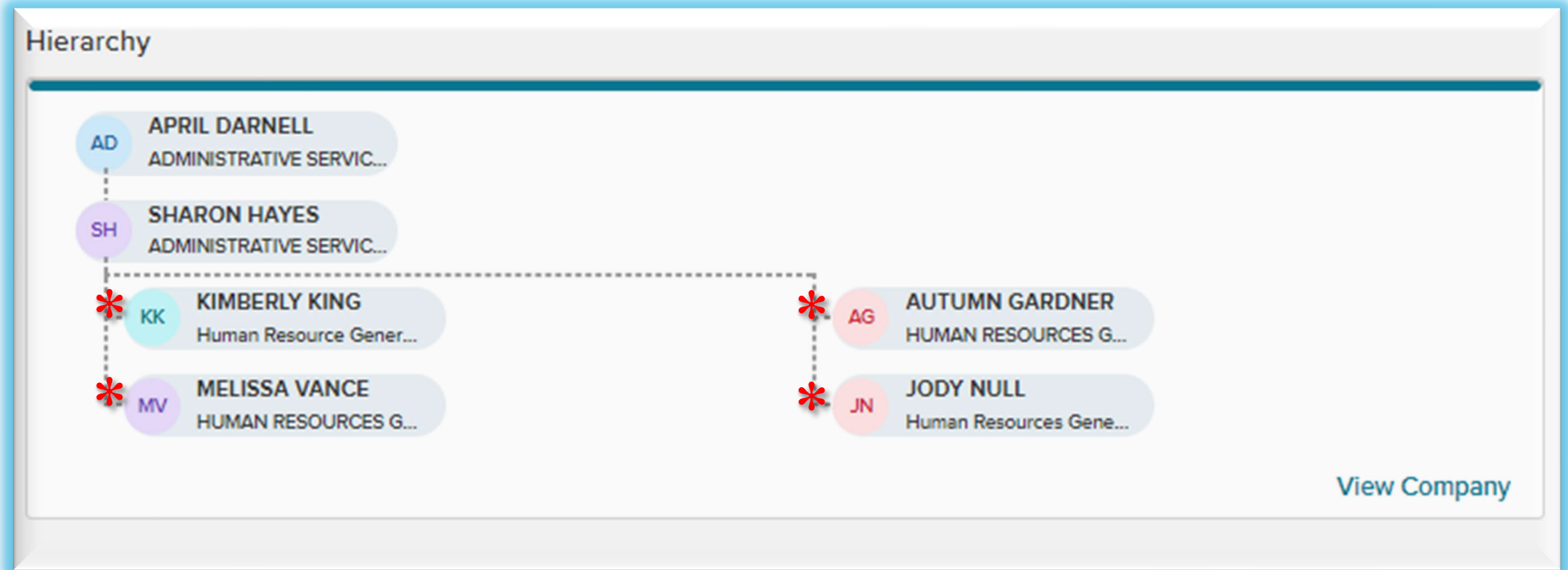
50

Search for employee, either by **Employee #** or **Employee Name**

The screenshot displays the NEOGOV PE Perform web application interface. At the top, there is a navigation bar with the logo and a dropdown menu. Below this is a secondary navigation bar with links to Dashboard, Employees, Performance Evaluations, Library, Positions, and Reports. The main content area is titled "Employee List" and features a search bar with a plus icon, a "Show All Employees" button, and a "Bulk Actions" button. Below the search bar is a table with columns for Photo, Employee #, Last Name, First Name, Direct Manager, and Position. The first row of the table is highlighted in blue and contains the following data: a checkbox, a photo placeholder with "AG", the employee number "0000164531", the last name "GARDNER", the first name "AUTUMN", the direct manager "SHARON HAYES", and the position "HUMAN RESOURCES GENERALIST 1". At the bottom of the table, there is a pagination control showing "1" of 1 items per page.

	Photo	Employee #	Last Name	First Name	Direct Manager	Position
<input type="checkbox"/>		Q Search	Q gardner X	Q autumn X	Q Search	Q Search
<input type="checkbox"/>	AG	0000164531	GARDNER	AUTUMN	SHARON HAYES	HUMAN RESOURCES GENERALIST 1

First Previous 1 Next Last 10 Items per page



Each direct report must be reassigned to a new manager.

Select Edit (pencil) under Employee Information box

AG AUTUMN GARDNER
HUMAN RESOURCES GENERALIST 1 | DHS - Division of Administrative Services

Employee Details Evaluations Tasks Development Plans Documents

Employee Details

Employee Information

EMAIL AUTUMN.R.GARDNER@WV.GOV	EMPLOYEE NUMBER 0000164531	ONLINE ACCESS Activated
HIRE DATE 06/18/2022	POSITION START DATE 11/18/2023	
POSITION TITLE HUMAN RESOURCES GENERALIST 1	DEPARTMENT DHS - Division of Administrative Ser...	DIVISION
CLASS SPEC Human Resources Generalist 1	DIRECT MANAGER SHARON HAYES	ADDITIONAL MANAGER(S) -
ADDRESS -	PHONE NUMBER -	ACTIVE Yes

Hierarchy

- AD APRIL DARNELL ADMINISTRATIVE SERVIC...
- SH SHARON HAYES ADMINISTRATIVE SERVIC...
- AG You HUMAN RESOURCES GE...

View Company

53

Delete and reassign a **Direct Manager** to each employee assigned to departing manager.

POSITION INFO	
Position	(0623PD1571) HUMAN RESOURCES GENERALIST 1
Department	(0623) DHS - Division of Administrative Services
Division	--
Class Spec	(7984) Human Resources Generalist 1
Position Type	(Full-Time Permanent) Full-Time Permanent
Bargaining Unit	--

Direct Manager

SHARON HAYES x

Once the employees have been assigned a new manager, you can now go in and terminate the departing manager.

55

SHARON HAYES
ADMINISTRATIVE SERVICES MANAGER 1 | DHS - Division of Administrative Services

Employee Details Evaluations Tasks Development Plans Documents

Upload Document Journal Entries | 0 [Settings]

Select the settings wheel

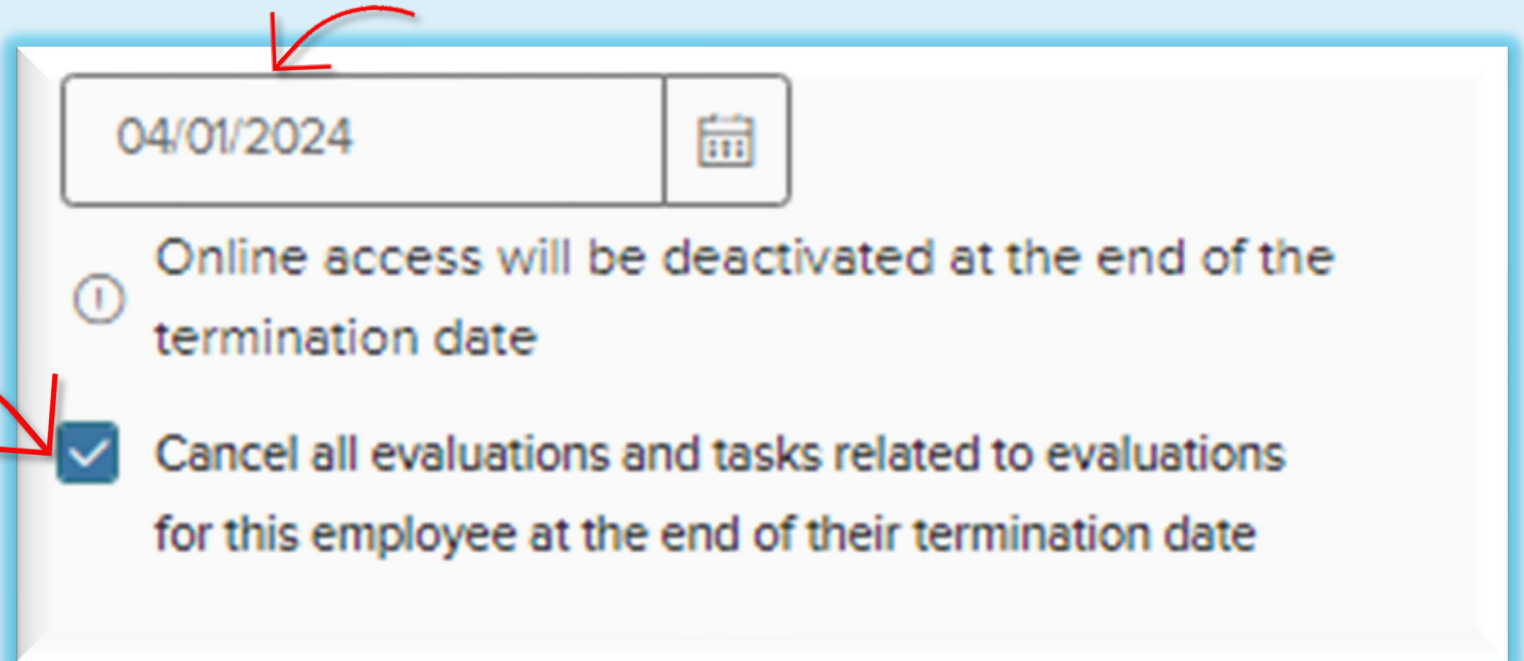
Upload Document Journal Entries | 0 [Settings]

- ⊘ Terminate
- ⊖ Exclude from Automatic or Bulk Evaluation Creation

Select
Terminate

Enter Termination Date

Check box to
“Cancel all
evaluations and
tasks...”



A screenshot of a web form for entering a termination date. At the top, a date field contains '04/01/2024' and a calendar icon. Below this is an information icon (i) followed by the text 'Online access will be deactivated at the end of the termination date'. Underneath is a checked checkbox (✓) followed by the text 'Cancel all evaluations and tasks related to evaluations for this employee at the end of their termination date'. Two red arrows point to the date field and the checked checkbox.


04/01/2024





Online access will be deactivated at the end of the termination date


Cancel all evaluations and tasks related to evaluations for this employee at the end of their termination date

Termination Details


4 Direct Reports


 SHARON HAYES
ADMINISTRATIVE SERVIC...

 This employee is a manager. Consider assigning a new manager and reassigning the manager's tasks.

- Fields are required.
- Termination Date

04/01/2024 

 Online access will be deactivated at the end of the termination date

Cancel all evaluations and tasks related to evaluations for this employee at the end of their termination date

If direct reports have not been reassigned, NeoGov will remind you in the termination screen.

ACCESSING EPA REPORTS

59

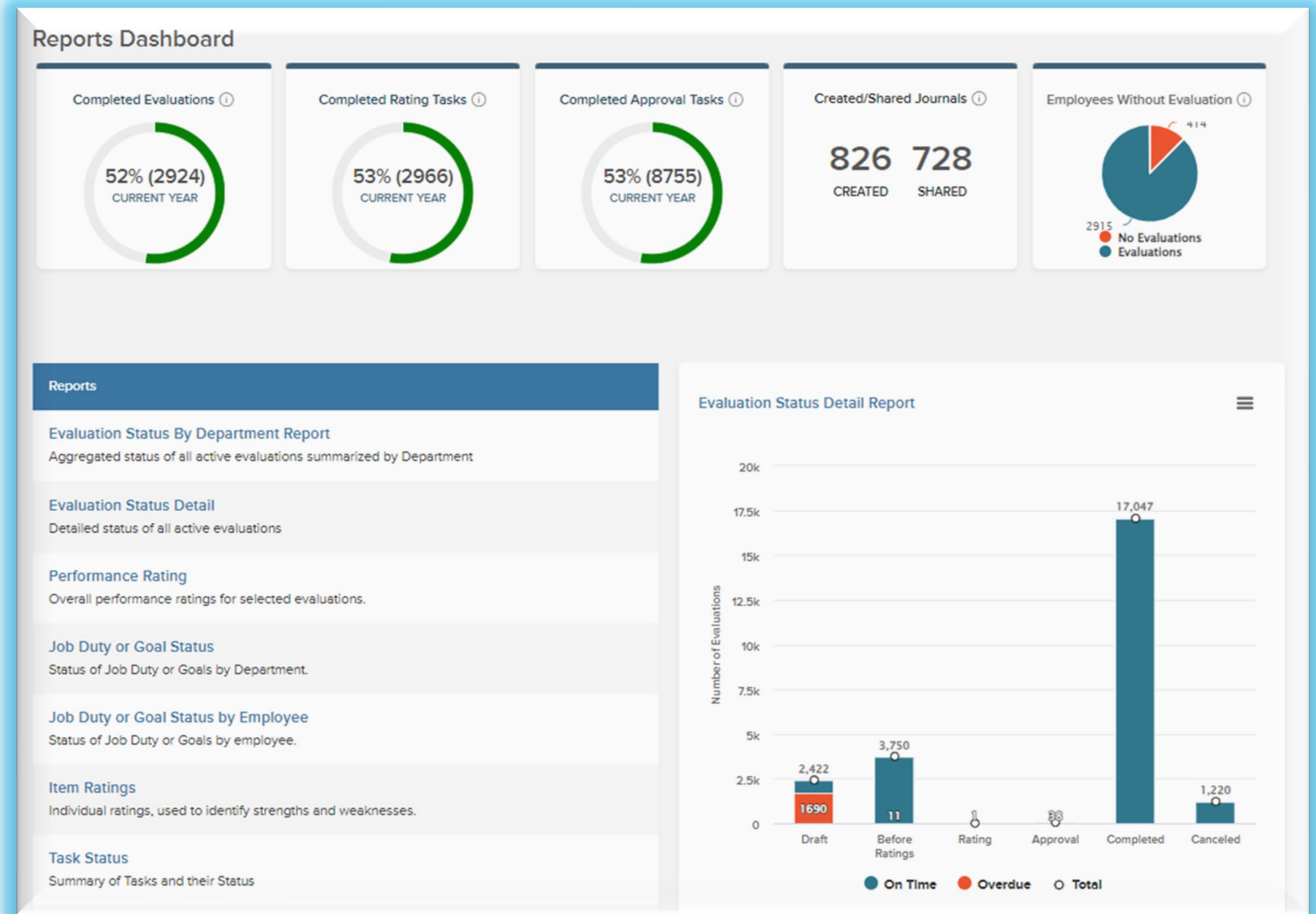
In Perform,

select the **Reports** tab

The screenshot shows the NEOGOV interface. At the top left, it says 'NEOGOVS' with a 'PE' icon. The main header is 'Perform' with a dropdown arrow. Below this, there are navigation tabs: 'Dashboard', 'Employees', 'Performance Evaluations', 'Library', 'Positions', and 'Reports'. The 'Reports' tab is selected, and its dropdown menu is open, showing 'Reports' and 'Organization Chart'. Below the navigation, there is a 'My Tasks' section with a 'view all >' link. At the bottom, there is a row of four colored boxes (white, purple, orange, green) each containing the number '0'. A red arrow points from the text 'In Perform,' to the 'Perform' header, and another red arrow points from the text 'select the Reports tab' to the 'Reports' dropdown menu.

60

The “Reports Dashboard” screen will appear



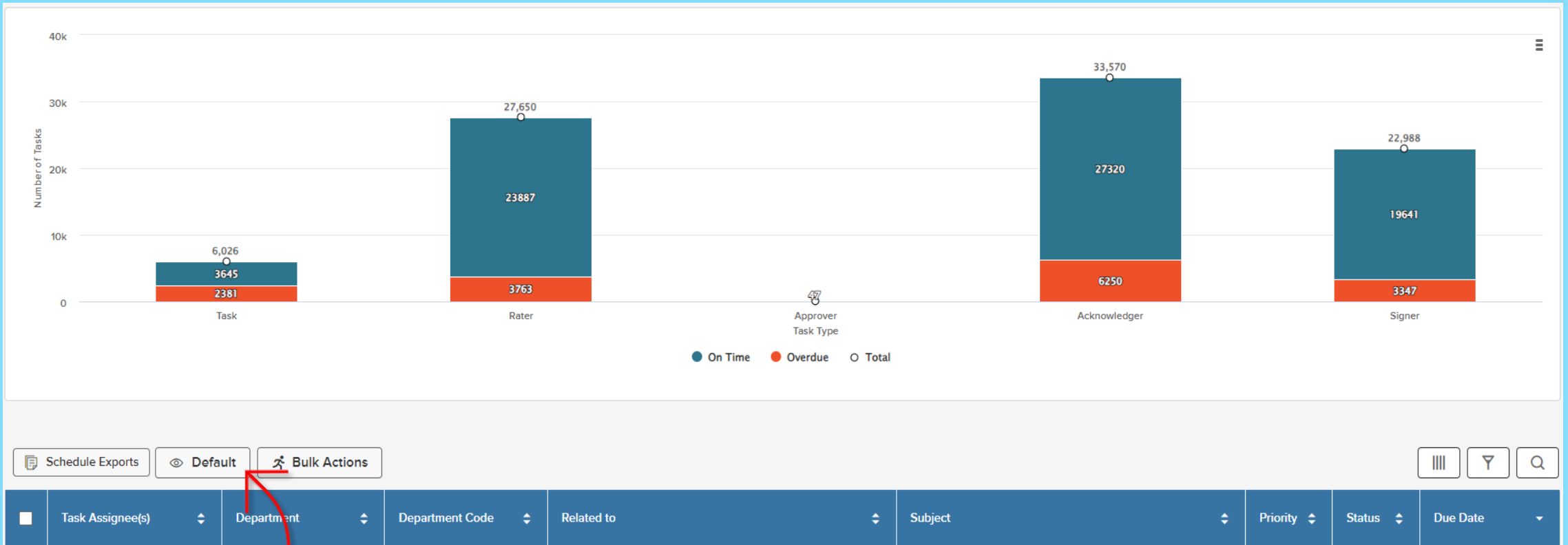
Select Task Status

Reports	
Evaluation Status By Department Report	Aggregated status of all active evaluations summarized by Department
Evaluation Status Detail	Detailed status of all active evaluations
Performance Rating	Overall performance ratings for selected evaluations.
Job Duty or Goal Status	Status of Job Duty or Goals by Department.
Job Duty or Goal Status by Employee	Status of Job Duty or Goals by employee.
Item Ratings	Individual ratings, used to identify strengths and weaknesses.
Task Status	Summary of Tasks and their Status
Approval Status	Approval Status for all approvals
Current vs. Historical Overall Performance	Compare Overall Performance Ratings from the Current Year with Previous Years



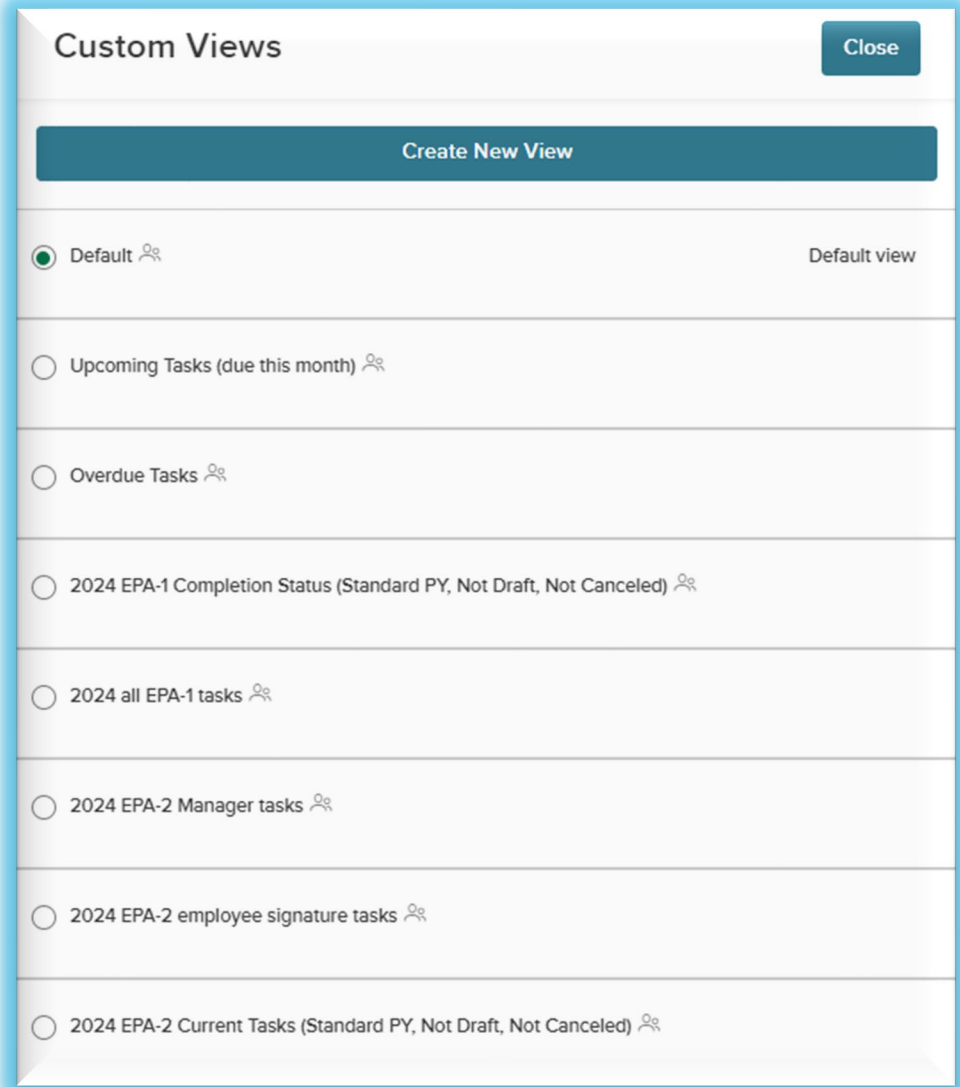
62

↓ Scroll down ↓



Select Default

This side panel will appear and display several filter options.



Select
**Upcoming Tasks
(due this month)**
to view your current
month's EPAs that
are due.



Custom Views Close

Create New View

- Default 🔗 Default view
- Upcoming Tasks (due this month) 🔗 Set Default
- Overdue Tasks 🔗
- 2024 EPA-1 Completion Status (Standard PY, Not Draft, Not Canceled) 🔗
- 2024 all EPA-1 tasks 🔗
- 2024 EPA-2 Manager tasks 🔗
- 2024 EPA-2 employee signature tasks 🔗
- 2024 EPA-2 Current Tasks (Standard PY, Not Draft, Not Canceled) 🔗

65

Select
**2024 EPA-2 Completions
(Standard PY, Not Draft,
Not Canceled)**
to view outstanding EPAs
in the current cycle.

Custom Views Close

Create New View

- Default Default view
- Upcoming Tasks (due this month)
- Overdue Tasks
- 2024 EPA-1 Completion Status (Standard PY, Not Draft, Not Canceled)
- 2024 all EPA-1 tasks
- 2024 EPA-2 Manager tasks
- 2024 EPA-2 employee signature tasks
- 2024 EPA-2 Current Tasks (Standard PY, Not Draft, Not Canceled) Set Default

You can also run a report to view ONLY Manager's tasks due, OR to view ONLY employee signature tasks due.

Custom Views Close

Create New View

- Default Default view
- Upcoming Tasks (due this month)
- Overdue Tasks
- 2024 EPA-1 Completion Status (Standard PY, Not Draft, Not Canceled)
- 2024 all EPA-1 tasks
- 2024 EPA-2 Manager tasks
- 2024 EPA-2 employee signature tasks
- 2024 EPA-2 Current Tasks (Standard PY, Not Draft, Not Canceled)

67

Task Assignee(s):
the person responsible for
the next step in the EPA
process.


Status: Completed or
Current (still pending)

Task Assignee(s)	Department	Department Code	Related to	Subject	Priority	Status	Due Date
Sharon Hayes	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	EPA-2: Mid-Year Check -In	Low	Completed	3/1/2024
Autumn Gardner	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	Sign Autumn Gardner: Performance Evaluation (PY2024) for AUTUMN GARDNER	Low	Current	3/1/2024

Subject: EPA level

68

“Mid-Year Check-In” if status is **current**, this means the EPA is at the supervisor’s level.



Task Assignee(s)	Department	Department Code	Related to	Subject	Priority	Status	Due Date
Sharon Hayes	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	EPA-2: Mid-Year Check-In	Low	Current	3/1/2024
Autumn Gardner	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	Sign Autumn Gardner: Performance Evaluation (PY2024) for AUTUMN GARDNER	Low	Completed	3/1/2024

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“Sign (*Employee Name*): Performance Evaluation (PY2024) for (*Employee Name*)”

If status is **current**, this means EPA is at the employee’s level to sign.

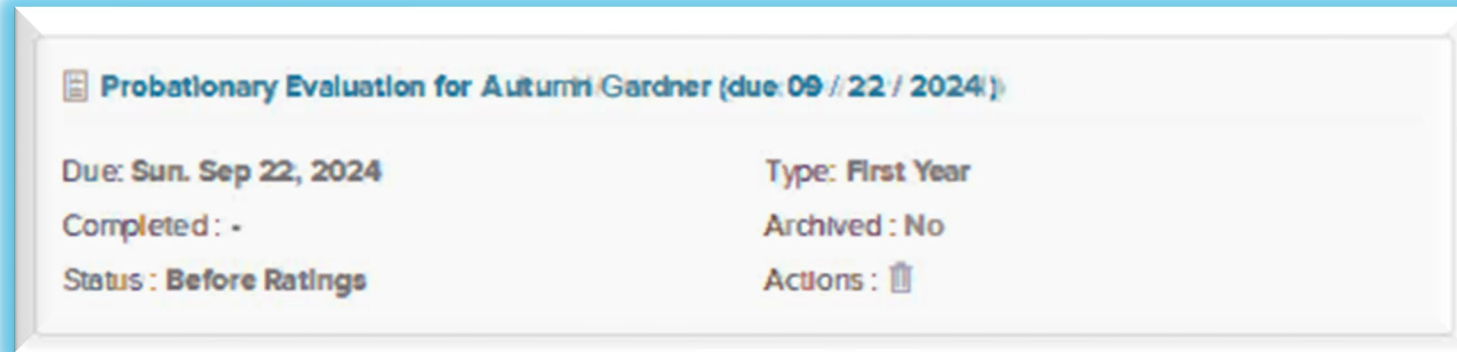
Task Assignee(s)	Department	Department Code	Related to	Subject	Priority	Status	Due Date
Sharon Hayes	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	EPA-2 Mid-Year Check-In	Low	Completed	3/1/2024
Autumn Gardner	DHS - Division of Administrative Services	0623	AUTUMN GARDNER: Performance Evaluation (PY2024)	Sign Autumn Gardner: Performance Evaluation (PY2024) for AUTUMN GARDNER	Low	Current	3/1/2024

TYPES OF EVALUATIONS



71

Probationary Evaluation



☰ Probationary Evaluation for Autumn Gardner (due: 09 / 22 / 2024)

Due: Sun. Sep 22, 2024	Type: First Year
Completed: -	Archived: No
Status: Before Ratings	Actions: 🗑️

Probationary Performance Appraisal – A formal performance rating completed 30 days *prior* to the end of a 6-months or 12-months probationary period.

72 Probationary Evaluation Timeline

EPA 1 : Setting goals and performance expectations.

EPA 2 : Mid-year check-in; gives feedback on how the employee is doing and how they can improve.

EPA 3 : Final review and formal rating of employee performance over the entire 12-month performance rating period.


73


Probationary EPA must be completed 4 weeks or 30 days before the end of a new hire's probationary period.

Non-uniform probationary period = 6 months
Uniform probationary period = 12 months

74

First Year Evaluation

 Autumn Gardner First Year Evaluation (PY2024-2025)

Due: Sat. Jun 21, 2025 Type: First Year
Completed :- Archived : No
Status : Before Ratings Actions : 

First-Year Performance Rating Period – A 12-month performance rating period established by the position start date.

75

First Year Evaluation Timeline

EPA 1 : will be completed within 30 days of the new hire's start date.

EPA 2 : will be completed within 6 months of the new hire's start date.

EPA 3 : will be completed within 12 months of the new hire's start date.

76

Annual Performance Evaluation

 **MELISSA VANCE: Performance Evaluation (PY2024)**

Due: Sat. Mar 01, 2025	Type: Periodic
Completed : -	Archived : No
Status : Before Ratings	Actions : 

Annual Performance Evaluation – The regularly scheduled annual performance rating period beginning January 1st of every year.

77 Annual Performance Evaluation Timeline

EPA 1 : will be completed between January 1st and March 1st.

EPA 2 : will be completed between July 1st and August 30th.

EPA 3 : will be completed between December 1st and March 2nd.

MAKING
CHANGES TO
EMPLOYEE'S EPA

79 When an employee is assigned a new supervisor, changes must be made under the **Process** tab.

MELISSA VANCE: Performance Evaluation (PY2024) [↗](#)
Due Date: Sat. Mar. 01, 2025 [↗](#)

Print [↕](#) Pause [⏸](#)

EVALUATION DETAILS
Current Status: Before Ratings
Type: Periodic [↗](#)

SCORES
TOTAL SCORE: Pending | OVERALL RATING: Pending

EMPLOYEE DETAILS
Position: HUMAN RESOURCES GENERALIST 1
Department: DHS - Division of Administrative Services

Content | **Process**

50% **COMPETENCY SECTION | FIVE POINT RATING SCALE_ACTIVE**
Universal Competencies
As government employees, how you do your work is as important as what you do. You are expected to be good stewards of the public trust and conduct yourself in ways that show good will, trust, and care for the people we serve. Because of these you will be evaluated on universal competencies geared toward exhibiting the values, goals, and expectations of government service.

Items	Description	Weight
Change Readiness and Adaptability	-Demonstrates ability to continuously learn and adapt to a changing environment. -Shows ability to change mindset, behavior, and work focus in response to ne...	20.00 %
Dependability	-Attendance supports the timely completion of the employee's own work. -Attendance supports the timely completion of the team's work. -Meets deadlines and...	20.00 %
Teamwork and Collaboration	-Openness to feedback. -Accountable for their own work. -Willing to help others. -Shares information on problems and issues with management and coworkers...	20.00 %
Customer Service	-Proactive in dealing with customer problems. -Courteous to internal and external customers and constituents. -Solves problems and assists in improving Intern...	20.00 %
Professionalism and Ethics	-Adheres to the law, rule, and policy on ethics and professional behavior under which their agency operates. -Adheres to any standards of professionalism provi...	20.00 %

80

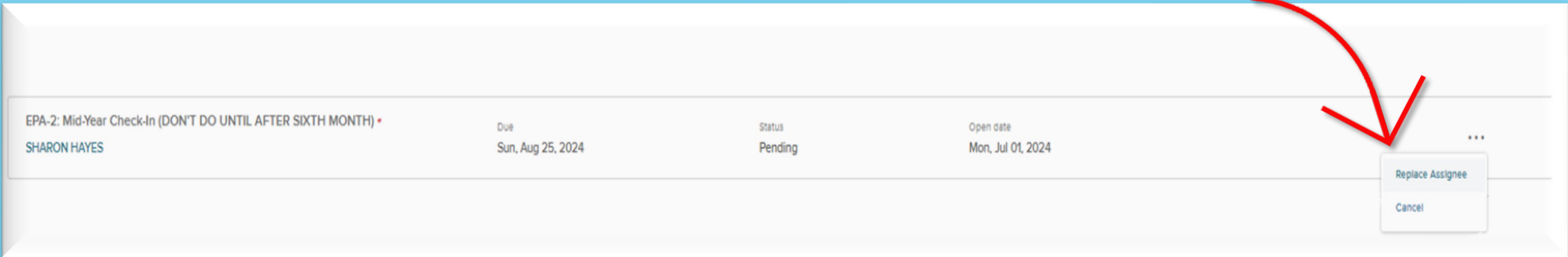
Click on the three dots (•••) next to the supervisor's steps

The screenshot shows a task management interface with a 'Process' tab. A vertical timeline on the left indicates the sequence of steps. The main area displays a list of tasks with columns for description, due date, status, and open date. The task 'EPA-2: Mid Year Check-In (DON'T DO UNTIL AFTER SIXTH MO...)' by SHARON HAYES is circled in red. A red arrow points to the three dots menu icon next to the 'Signature' task by MELISSA VANCE.

Step	Description	Due	Status	Open date
1	EPA-1: Setting Goals and Expectations • SHARON HAYES	Fri, Mar 01, 2024	Completed on 01/11/2024	
2	Signature • MELISSA VANCE	Fri, Mar 01, 2024	Completed on 01/11/2024	
3	EPA-2: Mid Year Check-In (DON'T DO UNTIL AFTER SIXTH MO... • SHARON HAYES	Sun, Aug 25, 2024	Pending	Mon, Jul 01, 2024
4	Signature • MELISSA VANCE	Fri, Aug 30, 2024	Pending	

Open Date: Sun, Dec 01, 2024 ⓘ

Select Replace Assignee



The screenshot shows a task list with the following details:

Task Name	Due	Status	Open date	Actions
EPA-2: Mid-Year Check-In (DON'T DO UNTIL AFTER SIXTH MONTH) • SHARON HAYES	Sun, Aug 25, 2024	Pending	Mon, Jul 01, 2024	⋮ Replace Assignee Cancel

A red arrow points from the top right towards the 'Replace Assignee' option in the dropdown menu.

Replace Task Assignee

* Fields are required.

Replacing an assignee will result in a transfer of all previous data for that task to the new assignee.

TITLE	DUE	STATUS
EPA-2: Mid-Year Check-In ...	Sun, August 25, 2024	Pending

Former Assignee: SHARON HAYES

REPLACE WITH: →

New Assignee: April Darnell

Cancel Save

Replace **Former Assignee** with **New Assignee**
and select **Save**

83

Make sure all supervisor's have been updated throughout the remainder of the EPA cycle.

The screenshot displays a workflow for an EPA cycle, organized into sections: 'Before Ratings', 'Ratings', and 'After Ratings'. A central callout box contains the text: 'Make sure all supervisor's have been updated throughout the remainder of the EPA cycle.' Red arrows on the left point to steps 3, 5, 6, and 7. The interface includes a vertical timeline on the left with step indicators (1-8) and a progress bar at the bottom.

Before Ratings

- Step 1: EPA-1: Setting Goals and Expectations * (SHARON HAYES)
- Step 2: Signature * (MELISSA VANCE)
- Step 3: EPA-2: Mid-Year Check-In (DON'T DO UNTIL A...) (SHARON HAYES)
- Step 4: Signature * (MELISSA VANCE)

Ratings

Open Date: Sun, Dec 01, 2024

Rating *	Due	Status	Weight	...
SHARON HAYES	Fri, Feb 14, 2025	Pending	100 %	...

After Ratings

Approval & Signature *	Due	Status	...
APRIL DARNELL	Wed, Feb 19, 2025	Pending	...
SHARON HAYES	Mon, Feb 24, 2025	Pending	...

Release to Employee

Signature *	Due	Status	...
MELISSA VANCE	Sat, Mar 01, 2025	Pending	...

Evaluation Due Date: Sat, Mar 01, 2025

84

If an employee is changing position numbers, their current EPA will need to be cancelled.

MELISSA VANCE: Performance Evaluation (PY2024) [↗](#)
Due Date: Sat. Mar. 01, 2025 [↗](#)

[Print](#) [Pause](#)

EVALUATION DETAILS
Current Status: Before Ratings
Type: Periodic [↗](#)

SCORES

Metric	Value
TOTAL SCORE	Pending
OVERALL RATING	Pending

EMPLOYEE DETAILS
Position: HUMAN RESOURCES GENERALIST 1
Department: DHS - Division of Administrative Services

[+ Add Task](#)

*Steps are required.

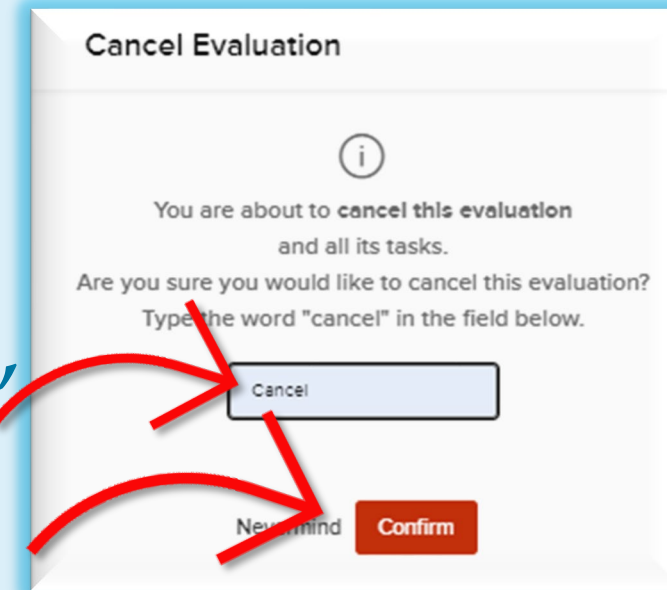
Before Ratings

Task	Due	Status
EPA-1: Setting Goals and Expectations • SHARON HAYES	Fri. Mar. 01, 2024	Completed on

A red arrow points to the 'Cancel' button in the top right corner of the interface.

85

Type “Cancel”
when prompted,
then select
Confirm



The screenshot shows a dialog box titled "Cancel Evaluation". It contains an information icon (i) and the following text: "You are about to **cancel this evaluation** and all its tasks. Are you sure you would like to cancel this evaluation? Type the word "cancel" in the field below." Below the text is a text input field containing the word "Cancel". At the bottom of the dialog, there are two buttons: "New Mind" and "Confirm". Two red arrows point from the text on the left to the "Cancel" input field and the "Confirm" button.

This will create a new EPA cycle to support the new position requirements.

EPA – LEGAL HOLDS



87

All legal holds must be submitted by the Division of Administrative Services.

DAS must be able to verify that the appropriate documentation has been received to support the legal hold.

Task Assignee(s)	Department	Department Code	Related to	Subject	Priority	Status	Due Date
Sharon Hayes	DHS - Division of Administrative Services	0623	HOLD AUTUMN GARDNER: Performance Evaluation (PY2024)	HOLD EPA-2: Mid-Year Check –In	Low	Current	3/1/2024
Autumn Gardner	DHS - Division of Administrative Services	0623	HOLD AUTUMN GARDNER: Performance Evaluation (PY2024)	Sign HOLD Autumn Gardner: Performance Evaluation (PY2024) for AUTUMN GARDNER	Low	Current	3/1/2024

88 A legal hold can be for a:

Medical Leave of Absence

FMLA

Military Leave

Workers' Compensation

Parental Leave

Personal Leave of Absence

Suspension Pending Investigation

Unauthorized Leave

The Division of Personnel will place all approved EPAs on hold status.

89 Steps to request a legal hold:

Step 1: Send the request through the DAS HR Request Form (2024)

Step 2: Attach the back-up documentation.

Step 3: DAS will submit the request to DOP on your behalf.

Step 4: DAS will forward the email from DOP when the request is approved.

Step 5: DAS will inform you if DOP rejects the request.

<https://forms.gle/D5V1P2Gujsm6ps496>





REFERENCES

Performance Improvement Plan (PIP) : it is strongly recommended that supervisors develop a written PIP for an employee whose evaluation overall rating is less than 3.00 (Meets Expectations) or in any situation in which the employee's performance is not meeting expectations throughout the performance year.

“Non-compliance with any section of this policy shall result in the employee becoming ineligible for discretionary pay increases for which an EPA is required.”

The NEOGOV Perform App

Don't have access to a computer on a regular basis? Don't worry. Here is another way to access and sign your EPAs, create Journal entries, and view other information in Perform: The NEOGOV Perform App.

Download the app by scanning this QR Code or searching NEOGOV in the App store and log in with your username and password.



95 CONTACT US

Please reach out via chat or
email to

Melissa.D.Vance@wv.gov

or

Autumn.R.Gardner@wv.gov



QUESTIONS OR
COMMENTS?