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



In Perform, select **Employees**

NEOGOV 💴	Perform 🗸		
Dashboard Emp	loyees Performance Evaluations	Library V Positions V	Reports 🗸
My Tasks view all	>		
	O Total	ORating	
hide table 🔨			

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.

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This screen will appear

Fill out all fields that have an asterisk (*)

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Uplosd photo		
Employee Info	le Name	* Last New•
Direct Manager Select	~	Additional Manager(s) Select v 2dd up to 5 edditional managers
Hire Info Mre Date Select Date	l	* Peakion Start Date
Separation Date Select Date Image: Content Date	I	• FTE
Contact Info Ceurity Search or browse]	
Address 1	Province	Address 2
Phone	er ravoat	• Email

Always enter information in all CAPS DIVISION OF ADMINISTRATIVE SERVICES

8	Employee Int Employee Int Emplo	
Enter Employee Number including all zeros	Fields are required. First Name Middle Name Employee Number Position Or Add new	

Select Choose Position

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

	Search position number by Position Code						
	Position Code	Position Title 💲	Department C 🛊	Department 🛟			
	\bigcirc 0623p000 \times	Q Search	Q Search	Q Search			
	0623P00008	ADMINISTRATIV	0623	DHS - Division of			
	0623P00009	ADMINISTRATIV	0623	DHS - Division of			
	0623P00018	ACCOUNTING T	0623	DHS - Division of			
Fir	st Previous	1 Next Last	10 V Items	per page			

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

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

Select V
Add up to 5 additional managers
Add Position
Position Start Date
Select Date
FIE Should
always be 1.00

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

Do not enter employee's address – leave blank

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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

Employee's name should be entered in all CAPS.

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

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

Do not use an asterisk (*) when entering an employee number. Always input all 10 digits (including zeros). 0000012345

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

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

Temps should never be entered in NeoGov.

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

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

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

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.

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

NEO	GOV	PE Perform 🗸					
Dashb	board	Employees Perfo	rmance Evaluations ~	Library V P	ositions \vee Reports \vee		
Emplo	Employee List + Show All Employees A Bulk Actions						
•	Photo	Employee #	Last Name 🗘	First Name 💲	Direct Manager 🗘	Position \$	
		Q Search	Q gardner \times	Q autumn X	Q Search	Q Search	
	AG 0000164531 GARDNER AUTUMN SHARON HAYES HUMAN RESOURCES GENERALIST 1						
Firs	First Previous 1 Next Last 10 🗸 Items per page						

AG AUTU HUMAN Employ	UMN GARDNER RESOURCES GENERALIST 1 DHS - ee Details Evaluations Tasks	Division of Administrative Services Development Plans Docu	s ments	Select Edit, (pencil))
Employee Details			Hiera	under Employee Information box	
EMAIL AUTUMN.R.GARDNER@WV.GOV HIRE DATE 06/18/2022	EMPLOYEE NUMBER 0000164531 POSITION START DATE 11/18/2023	ONLINE ACCESS Activated		SHARON HAYES ADMINISTRATIVE SERVIC	Τ
POSITION TITLE HUMAN RESOURCES GENERALIST 1 CLASS SPEC Human Resources Generalist 1 ADDRESS	DEPARTMENT DHS - Division of Administrative Ser DIRECT MANAGER SHARON HAYES PHONE NUMBER	DIVISION ADDITIONAL MANAGER(S) - ACTIVE		HUMAN RESOURCES GE View Company	
-	-	Yes	0		

Select Change Position

Change Position	or Add new
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	

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

FACTS

CHANGING POSITION NUMBERS IN PERFORM

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

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	

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.

NEOGOV	PE Perform	~				
Dashboard	Employees	Performance Evalu	ations ~ Lib	rary ~	Positions ~ Re	ports ~
Positio	Position List + All records					
Position	n Title	¢	Position Code	¢	Department	¢
Q Sea	irch		Q Search		Q Search	

TRUE OR FALSE

CHANGING POSITION NUMBERS IN PERFORM

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

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



A position number can be assigned to multiple employees.



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



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

False

True

The facility HR is responsible for updating position changes.



TERMINATING EMPLOYEES IN PERFORM

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



AG HUMAN	N RESOURCES GENERALIST 1 DHS -	Division of Administrative Service	es	Coloct Edit (10010 cil)	
Employ	ee Details Evaluations Tasks	Development Plans Doc	cuments	Jelect East (pench))
Employee Details				under Employee	
oloyee Information			Hi		
EMAIL	EMPLOYEE NUMBER	ONLINE ACCESS	2	Information box	
AUTUMN.R.GARDNER@WV.GOV	0000164531 POSITION START DATE	Activated		SH ADMINISTRATIVE SERVIC	
06/18/2022 POSITION TITLE	11/18/2023 DEPARTMENT	DIVISION		AG You HUMAN RESOURCES GE	
HUMAN RESOURCES GENERALIST 1	DHS - Division of Administrative Ser			View Company	
CLASS SPEC Human Resources Generalist 1	DIRECT MANAGER SHARON HAYES	ADDITIONAL MANAGER(S)			_
ADDRESS	PHONE NUMBER	ACTIVE Yes			
			0		

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

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	

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Remember to select **Save**







TERMINATING SUPERVISORS IN PERFORM

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





Each direct report must be reassigned to a new manager.

AG AG AG AG HUMAN RESOURCES GENERALIST 1 DHS Employee Details Evaluations Tasks Employee Details	Division of Administrative Services Development Plans Documents	Select Edit (pencil) under Employee Information box
Employee Information EMAIL EMPLOYEE NUMBER AUTUMN.R.GARDNER@WV.GOV 0000164531 HIRE DATE POSITION START DATE 06/18/2022 11/18/2023	ONLINE ACCESS Activated	APRIL DARNELL ADMINISTRATIVE SERVIC SH SHARON HAYES ADMINISTRATIVE SERVIC
POSITION TITLE DEPARTMENT HUMAN RESOURCES GENERALIST 1 DHS - Division of Administrative Ser CLASS SPEC DIRECT MANAGER Human Resources Generalist 1 SHARON HAYES ADDRESS PHONE NUMBER - -	DIVISION ADDITIONAL MANAGER(S) - ACTIVE Yes	View Company
	0	

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

Position (0) RE 1	623PD1571) HUMAN ESOURCES GENERALIST
Department (0) Ad	623) DHS - Division of dministrative Services
Division	
Class Spec (79 Ge	984) Human Resources eneralist 1
Position Type (Fit	ull-Time Permanent) Full- me Permanent
Bargaining Unit	

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



Select the settings wheel







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



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59	In I	Perform,			
	(S	select	the I	Reports tab
NEOGO	V PE Perfo	orm 🗸			
Dashboard	Employees	Performance Evaluations \checkmark	Library 🗸	Positions \lor	Reports ~
					<u>Reports</u>
My Tasks	<u>view all</u> >				Organization Chart
	0	0	0		0

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

Scroll down



This side panel will appear and display several filter options.

Custom Views	Close
Create New View	
● Default ² %	Default view
O 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) 🔗	

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) ²	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) 🔗	

Select 2025 EPA-1 Completion Status (Standard PY, Not Draft, Not Canceled) to view outstanding EPAs in 2025 EPA-1 cycle.

Custom Views	Close						
Create New View							
O Default 🖄	Default view						
O 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) 🖄							
● 2025 EPA-1 Completion Status (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 ^Q	Default view		
	◯ Upcoming Tasks (due this month) 😤			
⊖ Overdue Tasks [⊗]				
	🔿 2024 EPA-1 Completion Status (Standard PY, Not Draft, Not Canceled) 🔗			
	O 2024 all EPA-1 tasks ^A			
	◯ 2024 EPA-2 Manager tasks 😤			
	○ 2024 EPA-2 employee signature tasks ²			
	🔿 2024 EPA-2 Current Tasks (Standard PY, Not Draft, Not Canceled) 🔗			

process.

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Task Assignee(s):

the person responsible for the next step in the EPA

Status: Completed or Current (still pending)

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

Subject: EPA level

"Mid-Year Check-In" if status is **current**, this means the EPA is at the <u>supervisor's</u> 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

"Sign (*Employee Name*): Performance Evaluation (PY2024) for (*Employee Name*)"

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

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

TYPES OF EVALUATIONS





Probationary Evaluation

Probationary Evaluation for Autum	n 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.
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



First Year Evaluation

Autumn Gardner First Year Evaluat	Ion (PY 2024-2025)	
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.



First Year Evaluation Timeline

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

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

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

Annual Performance Evaluation

MELISSA VANCE: Performance Evaluation (PY2024)				
Due: Sat. Mar 01, 2025	Type: Periodic			
Completed : -	Archived : No			
Status : Before Ratings	Actions : 🛍			

<u>Annual Performance Evaluation</u> – 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.



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

MV MELISSA VANCE	MELISSA VANCE: Performance Evaluation (PY2024) ∠ Due Date: Sat. Mar. 01, 2025 ∠		Cancel			
Position: HUMAN RESOURCES GENERALIST 2 Department: DHS - Division of Administrative	EVALUATION DETAILS SC Current Status: Before Ratings Type: Periodic 2 ①	ORES EMPLOYEE DETAILS TOTAL SCORE OVERALL RATING Pending Pending Pending Pending Department: DHS - Division of Administrative Services	o			
View Org Chart Manager(s)	Content Process 50% Content Process Some competency section I 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 environmentShows 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 workAttendance supports the timely completion of the team's workMeets deadlines and 20.00 %				
	Teamwork and Collaboration	-Openness to feedbackAccountable for their own workWilling to help othersShares information on problems and issues with management and coworkers				
	Customer Service	-Proactive in dealing with customer problemsCourteous to Internal and external customers and constituentsSolves 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 operatesAdheres to any standards of professionalism provi 20.00 %				
	C		•			

⁸⁰ Click on the three dots (•••) next to the supervisor's steps

Con	ent Process				+ Add Task
•Steps	are required.				
•	Before Ratings				
•	EPA-1: Setting Goals and Expectations • SHARON HAYES	Due Fri, Mar 01, 2024	Status Completed on 01/11/2024		
•	Signature * MELISSA VANCE	Due Fri, Mar 01, 2024	Status Completed on 01/11/2024		
3	EPA-2. Mid Year Check-In (DON'T DO UNTIL AFTER SIXTH MO • SHARON HAYES	Due Sun, Aug 25, 2024	Status Pending	Open date Mon, Jul 01, 2024	~~
4	Signature * MELISSA VANCE	Due Fri, Aug 30, 2024	Status Pending		

Open Date: Sun, Dec 01, 2024 (i)

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Select Replace Assignee

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

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Replace Task Assignee			×
• Fialds are regulized			
Replacing an assignee will	result in a transfer of all previous d	ata for that task to the new assignee.	
EPA-2: MId-Year Check-In	DUE Sun, August 25, 2024	Pending	
Former Assignee		New Assignee	
SHARON HAYES		April Darnell	
		1	
	Cancel Save		
		/	

Replace Former Assignee with New Assignee and select Save



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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				Cancel
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	O
Content Process *Steps are required. Before Ratings EPA-1: Setting Goals and Expectations * SHAPON HAYES	Due Eri Mar 01 2024	Status Completed on		+ Add Task



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

EPA – LEGAL HOLDS





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	Related to	Subject	Priority	Status	Due Date
		Code					
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)	SignHOLDAutumn 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

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

Unauthorized Leave

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





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<u>Performance Improvement Plan (PIP)</u> : 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.



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Please reach out via chat or email to

Melissa.D.Vance@wv.gov

or

Autumn.R.Gardner@wv.gov



