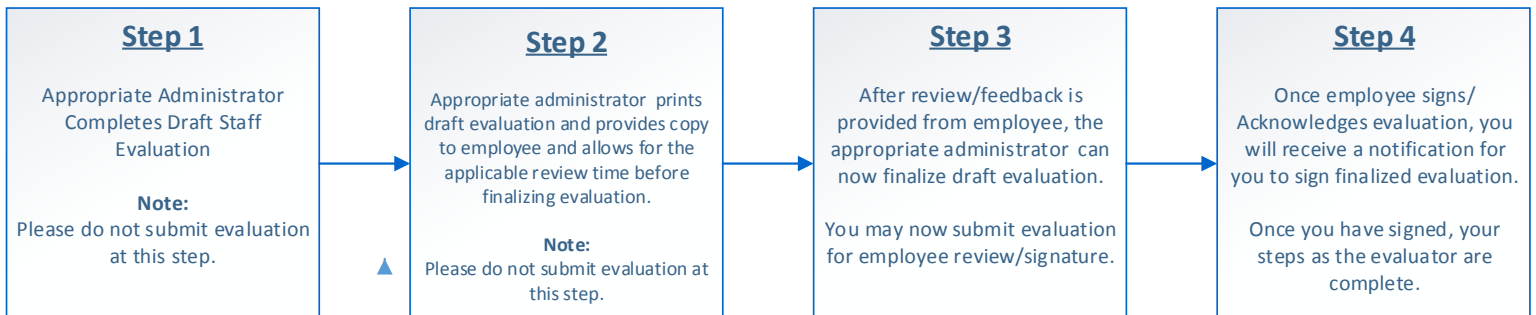


NEOGOV

Perform Training Guide for Evaluators

Evaluation Timeline



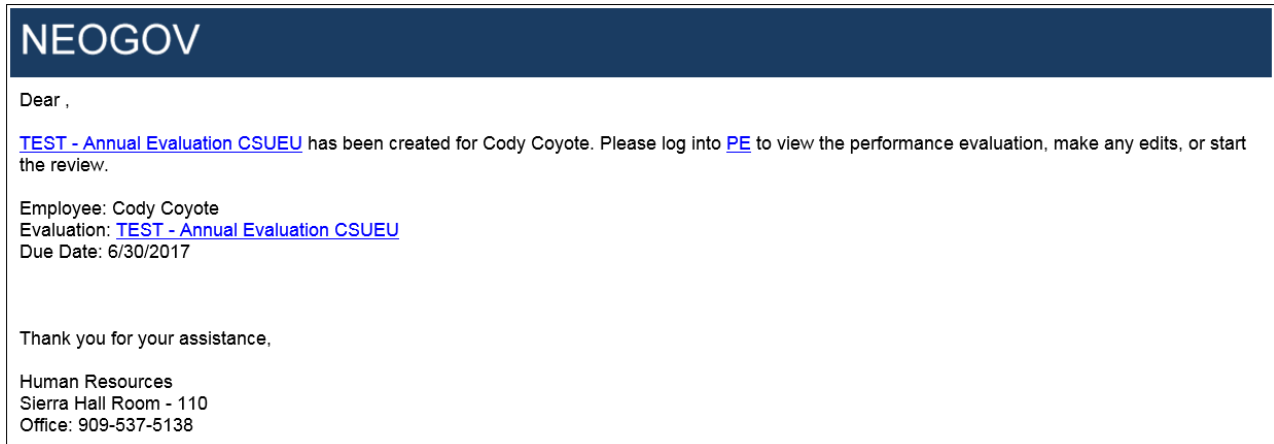
The Evaluation Process for Managers & Employees

Topics in this section include Objective Setting, Rating, and Approving, as related to the Employee and Manager roles in the evaluation process.

A.	Starting Evaluation(s)	pg. 3
B.	Rating a Performance Evaluation	pg. 4
C.	Approving & Signing an Evaluation(s)	pg. 7
D.	Notes & Attachments.....	pg. 10

Starting Evaluation(s)

Step 1: You will receive an email from NeoGov informing you that an evaluation is ready for you to draft.



You can select the link from the email and it will take you directly to the NeoGov login page. Remember, your log in credentials are different from your MyCoyote credentials. **Your username will be your CSUSB Email.** If you need you password reset link, please contact HR.

Once you log into NeoGov, the evaluation can be activated by selecting "**Rate**".

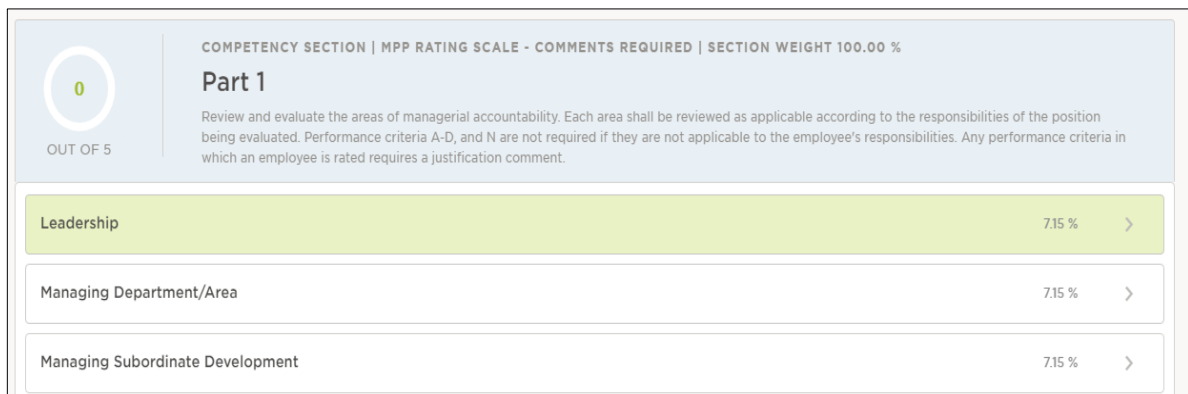
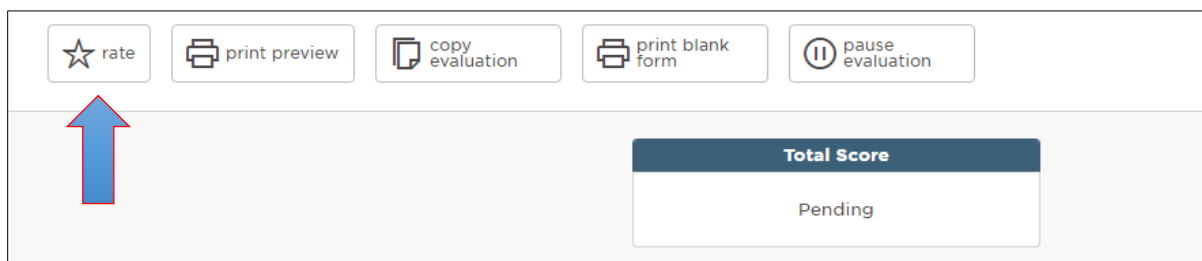
Rating a Performance Evaluation

Raters/Evaluators can access rating tasks requiring their action directly from **My Dashboard**, then click into each "item" in the evaluation rating form to enter their rating and/or comments.

The actual content in each evaluation rating form may differ by employee group; however, the process will be similar for all.

Step 1: Rate Employee

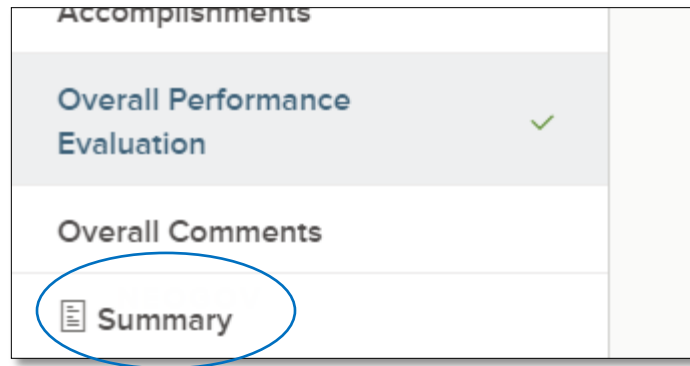
To begin the rating process of adding your ratings, please select the "Rate" button (Has picture of Star)



Note: The comments and ratings you record will automatically save throughout the process and will not be visible to the employee until you print a draft evaluation to provide to your employee.

Step 4: Print Draft Evaluation and provide to employee for review

When you are done drafting an evaluation, go to the "sections" checklist and select "summary" (At the very bottom of checklist)



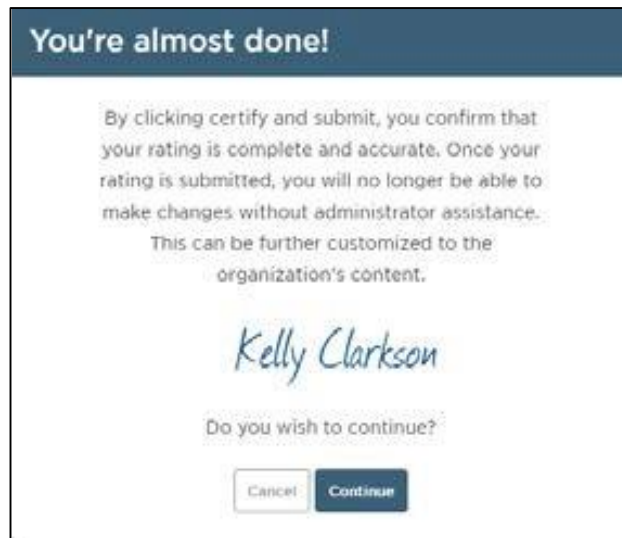
Next you will select "Print Current State" and a popup will open your employee's draft evaluation. Please provide this a copy to your employee to allow for the applicable review and comment time.

Note: Please do not "submit" evaluation at this step, only print draft evaluation. You need to provide your employee with the applicable review time and allow for feedback.

Once review time has elapsed, please move to step 5.

Step 5: Submit finalized Evaluation to Employee.

When all required items have been completed, click **Submit**. Confirm that the rating is complete and accurate by selecting **Continue** once more. Otherwise, select **Cancel** to return to previous page.



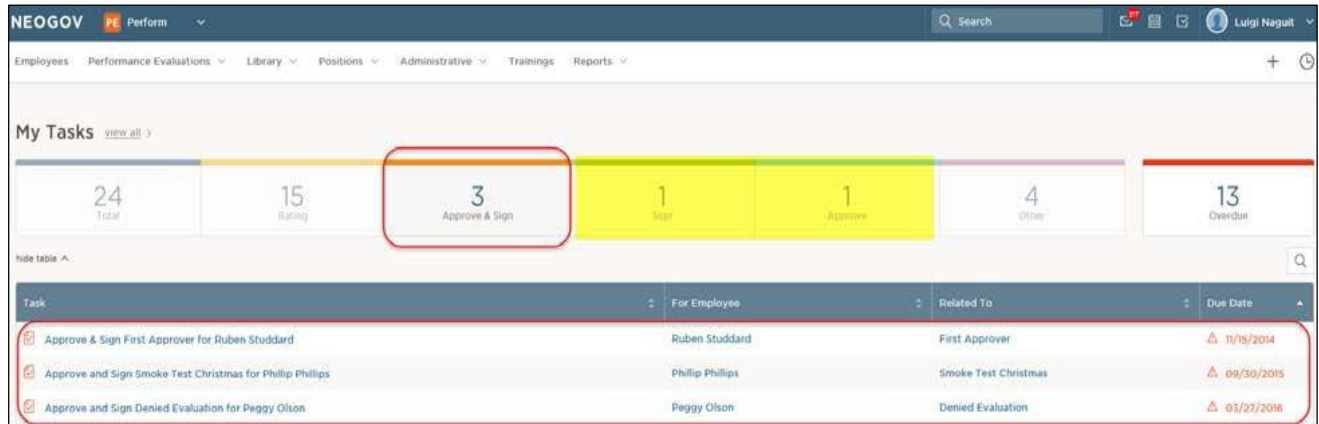
Once successfully submitted, if an approval process is required, an email will be automatically be sent to the employee to sign/acknowledge receipt of evaluation.

Proceed to Step 6.

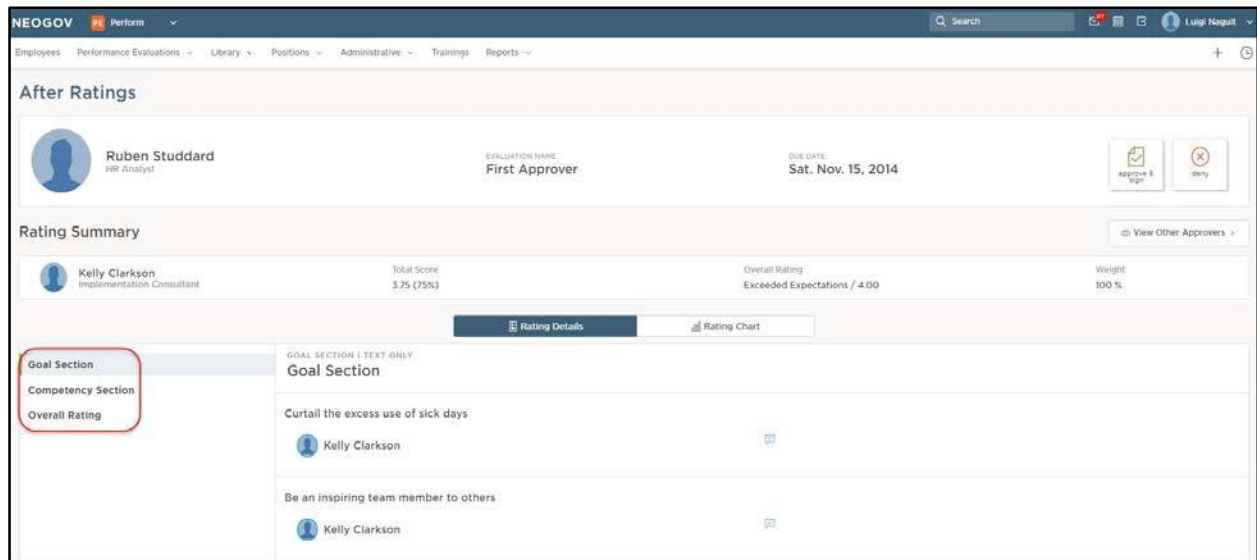
Approving & Signing an Evaluation

Step 6: Sign Evaluation for second time.

Once the employee has signed/acknowledged their annual evaluation, you will receive an email notification. To approve and/or sign, you may click on the icon or task title under the Task column (See below).



Once the **Evaluation Approval** page appears, click through each Content section to view full details of the evaluation before recording the approval or denial:

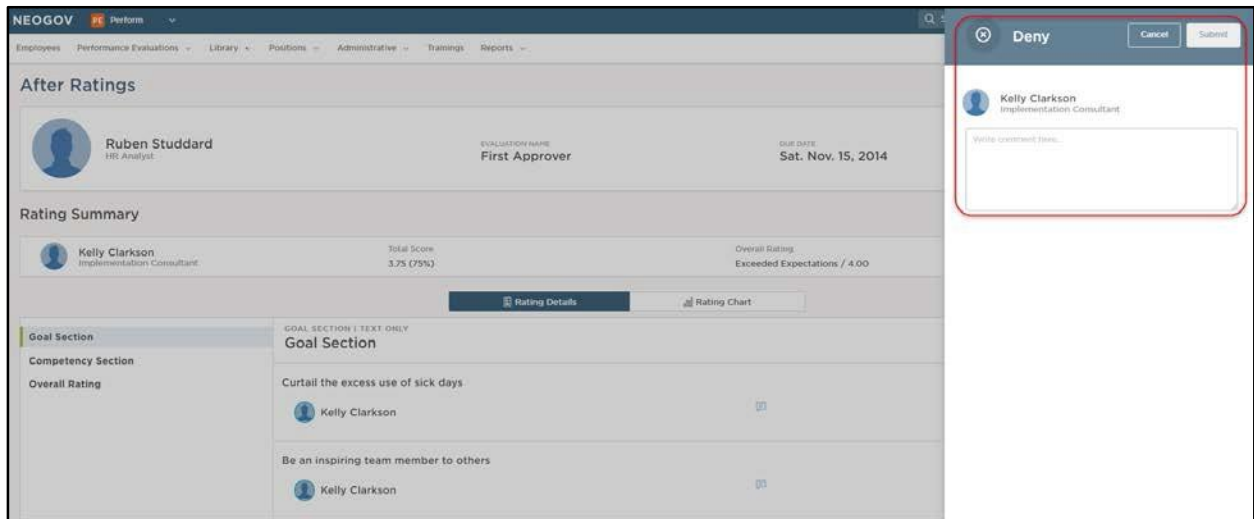


In this example, the 1st approver has both approval and signature rights. Hence, the approval icons and the signature line will appear once you select **Approve & Sign**.

Click the **Approve & Sign (or Approve)** icon and select **Submit**, if you agree with all ratings and comments.

If you disagree with anything, and would like to see changes made, select the **Deny** icon. Be sure to enter comments, and when ready click **Submit**. An email will be generated to any rater(s) the evaluation has been sent back to for changes.

Note: If you feel an evaluation needs denial, please contact HR before doing so.

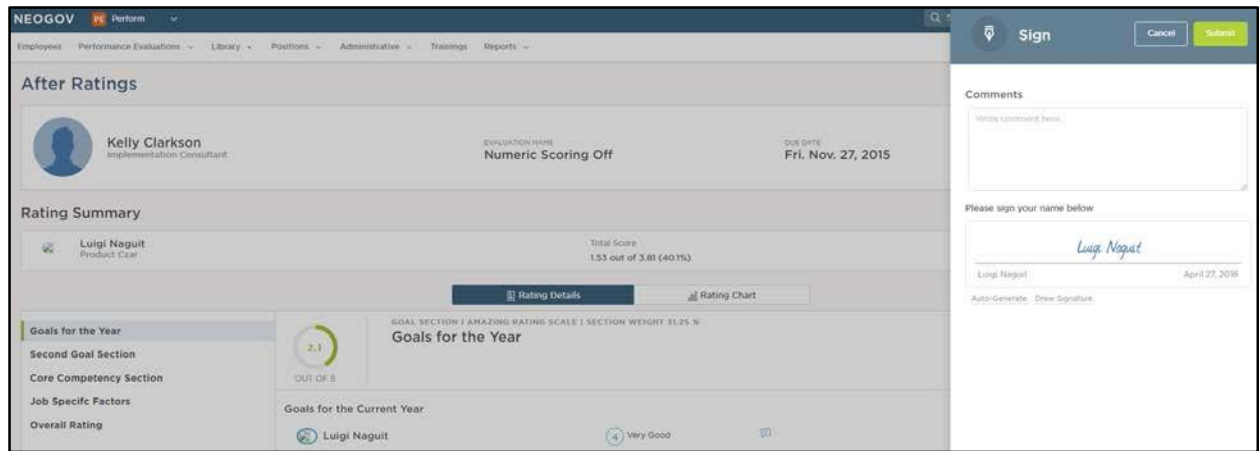


NOTE: When an evaluation is denied, and it is sent back to any weighted rater(s) for changes. Once the Rater(s) resubmit, the approval process is re-triggered again to the 1st Approver.

When an evaluation is approved, an email is immediately generated to the next approver in the sequence to record their approval and/or signature.

If only a signature is required, the option to approve/disapprove will not appear. Typically, employees are granted signature rights only.

Enter an electronic signature or draw in your own by clicking **Draw Signature**:



Enter any comments, and click **Submit**.

Once all approvals and signatures have been recorded, if there are no further approvers in the **After Ratings** section, the evaluation is considered *Completed* and the status will update accordingly.

Evaluation Detail

Score

4.09 out of 5.00 (81.88%)

print

print blank form

archive evaluation

General

DUE DATE Thu. Dec. 31, 2015		STATUS Completed	
Evaluation Name	2015 Evaluations	Employee	Denny Chen
Type	Periodic	Position	Compensation Manager
Archived	No	Department	Town Administrator's Office
		Division	Municipal Court

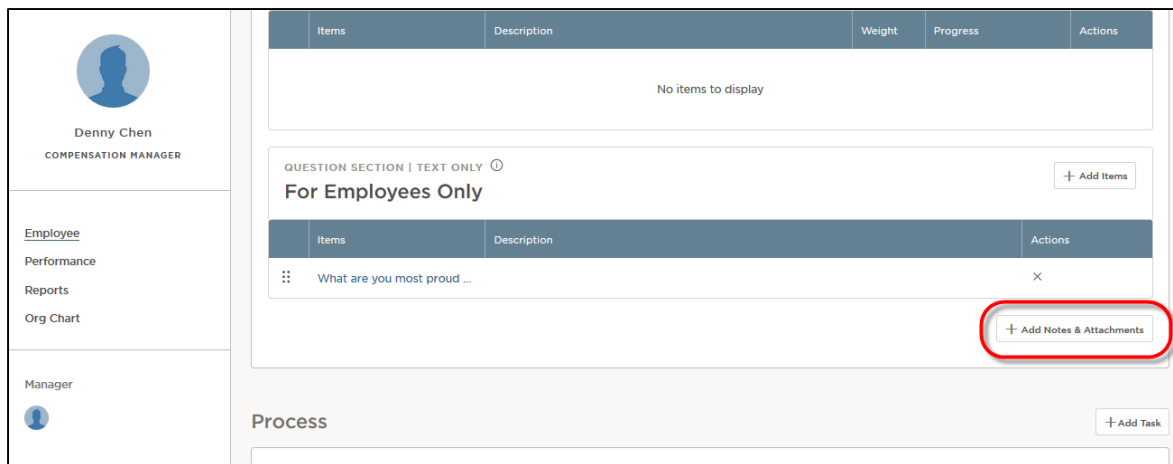
Notes & Attachments (optional)

When recording job strengths and/or deficiencies please use attachments as needed. (emails, letter, memo, etc.)

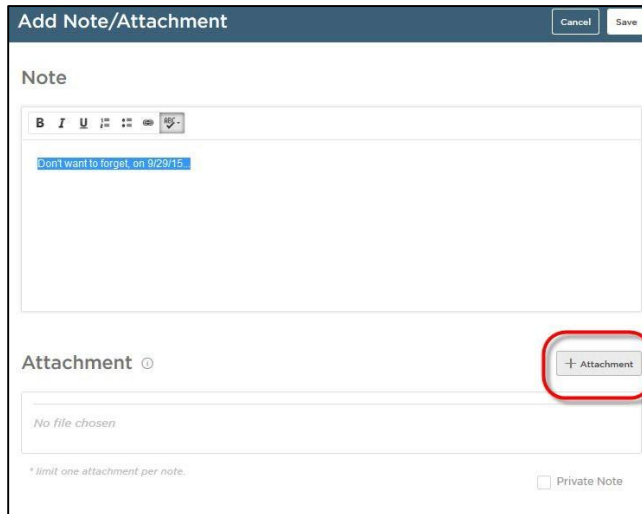
NOTE: Notes and attachments can be added to evaluations while in any status (*Draft, Not Started, Rating, Approval, etc.*).

Notes and attachments can be added to an evaluation from within the **Evaluation Detail** page (as configured by security).

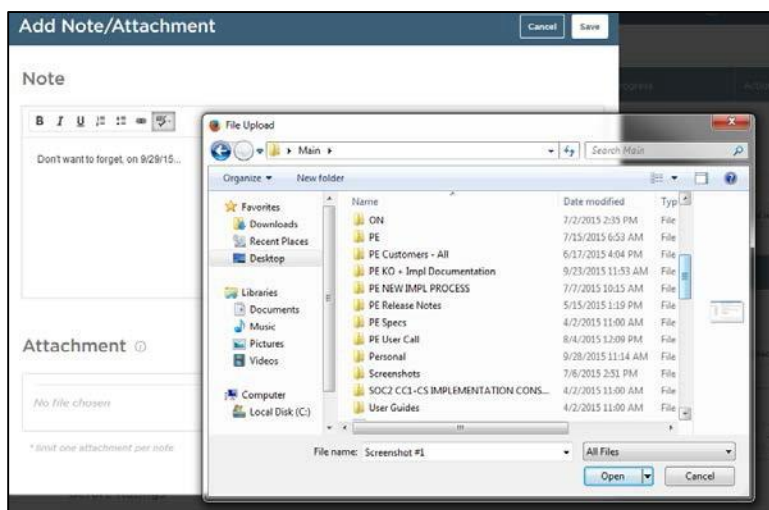
To add a note or attachment, access the respective evaluation by clicking into the **Evaluation name**, then scroll to the bottom of the **Content** section. Click the **+Add Notes & Attachments** button:



Type directly into the body of the **Note**, and use the **RTE** as needed to format any text.



Click the **+Attachment** button to add a file as an attachment, and browse to select the file:



Select **Private Note** to hide the note from anyone else with access to the evaluation.

Add Note/Attachment Cancel Save

Note

B I U [List Icon] [Link Icon] [Image Icon]

Don't want to forget, on 9/29/15...

Attachment + Attachment

No file chosen

Private Note

* limit one attachment per note.

To launch a note or attachment for viewing, access the corresponding **Evaluation Detail** page, scroll down to the bottom of the **Content** section to see all notes and attachments then click into the respective note or attachment.

To read the note click into the text hyperlink; to launch the attachment click on the paperclip icon under the **Actions** column:

No items to display

QUESTION SECTION | TEXT ONLY ⓘ

For Employees Only + Add Items

Items	Description	Actions
⋮	What are you most proud ...	×

+ Add Notes & Attachments

Note/Attachment	Created By	Created On	Actions
File added [Attachment: Presentation1.pptx]	Yvonne Rodriguez	09/30/2015	
Private Don't want to forget, on 9/29/15...	Yvonne Rodriguez	09/30/2015	

Repeat to add as many notes or attachments as necessary, throughout the evaluation process. If you have trouble with adding attachments, please work with HR and we will the attachments to the employee's evaluation.