

NEOED/NEOGOV Performance Module User Guide for Employees & Supervisors – Performance Evaluations

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Overview

Perform is a component of NEOED that manages performance evaluations for full-time employees. The module automates the evaluation process by sending notifications and reminders, providing easy access to evaluation forms, displaying all steps associated with the process and tracking progress made toward completion. In addition, the journal entries, reviewer entries and writing assistants serve as tools to conveniently recall and include performance-related items that has been documented throughout the year.

Performance Evaluation Programs

Lee College assigns an “evaluation program” to every full-time employee. Full-time instructors are assigned the Teaching Faculty program evaluation. Everyone else is assigned to the Non-Teaching Employee program evaluation, this includes employees classified as non-teaching faculty (e.g., librarians, counselors, lab coordinators, etc.).

Performance Evaluation Steps

1. Employee completes a self-evaluation form.
2. Supervisor completes a supervisor evaluation form.
3. Supervisor meets with employee to discuss the employee’s performance during the evaluation period.
4. Electronic signatures are obtained - supervisors in the chain of command and the employee.

Getting Started: Log In to NEOED

To access Perform, log into NEOED. Employees who have been assigned network access through IT (i.e., have a Lee College username and password for logging into devices) will log in using the College’s [Single Sign On \(SSO\) website \(https://leecollege.onelogin.com/launch/1566527\)](https://leecollege.onelogin.com/launch/1566527). When logging in to the SSO site, use the username and password IT created for you. If you need assistance logging into SSO, contact the Help Desk at helpdesk@lee.edu or (281) 425-6952.



Username

Remember my username

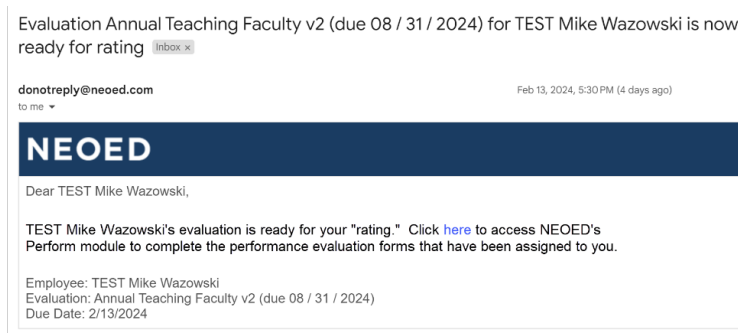
Continue

[Forgot Password](#)

Employee Perspective

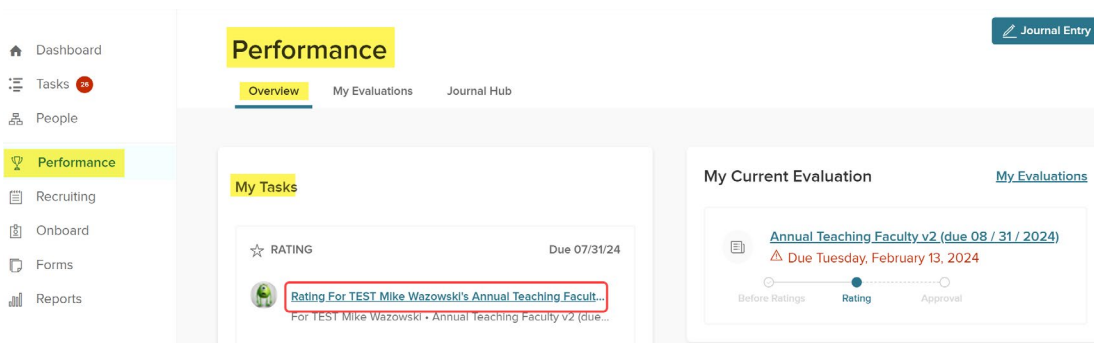
Completing Your Self-Evaluation

1. The system will send you an automated email making you aware that a task has been assigned to you (i.e., “Your evaluation is ready for your “rating.”) This means your self-evaluation form is available and ready to be completed. Click the link embedded in the email to log into NEOED to access your self-evaluation form.

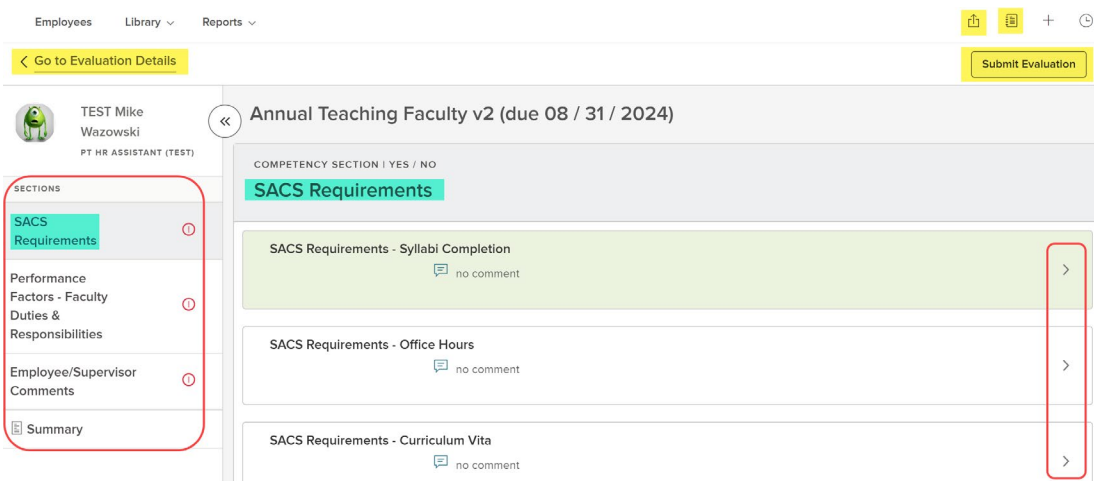




If you do not receive an email, you can access the Perform module anytime by logging into NEOED using the directions provided in the Getting Started: Log In to NEOED section.

2. From the Dashboard, select the Performance link on the left. Under the Overview tab, in the My Tasks box, click the appropriate evaluation link.

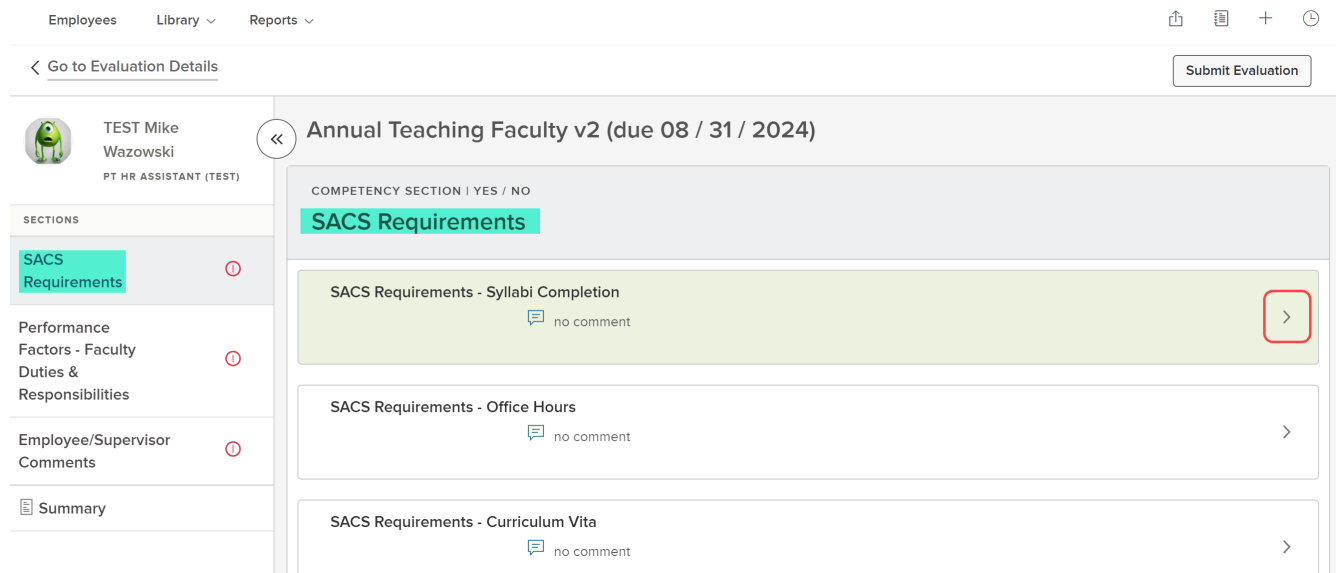


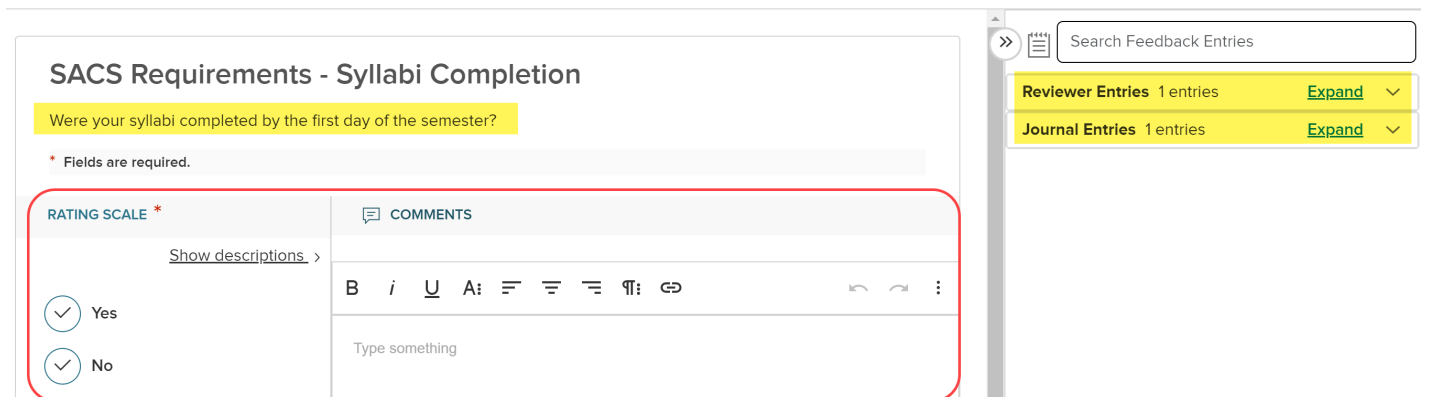
3. The Self-Evaluation Form will appear. The different sections of the evaluation will populate on the left. If you click on a section, it will open and display in the main part of the page. In the example below, the SACS Requirement section (on the Teaching Faculty Evaluation Form) was selected and is displayed. You may move between the sections and complete them in any order.

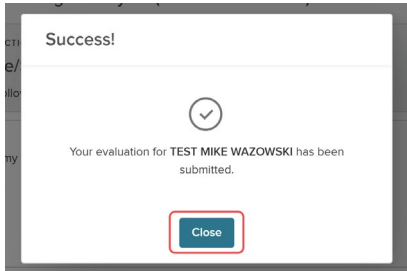
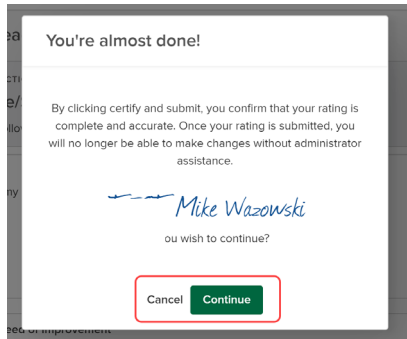


- Click the > on the right to view a specific question and type a response.
-  Click the journal icon on the right to access the Journal Hub.
-  Click the upload icon on the right to add documents to your profile.
- Click the Go to Evaluation Details on the left to view the steps, assignments and deadlines associated with your performance evaluation.
- Click Submit Evaluation on the right when you are finished filling out the self-evaluation and ready to submit it electronically to your supervisor.

4. To fill out your self-evaluation form, click the > to the right of each question. The question and a comment box will appear.
- Select the Next > link on the right to proceed to the next question or < Prev to return to the previous question/response.
 - Select Done to return to the self-evaluation's home page.
 - If available, the Reviewer Entries, Journal Entries and/or Writing Assistant tabs will populate on the right. They are resources to help you develop content for your evaluation. Learn more about the options in the appropriate sections below.







7. The evaluation summary page will display.
- Click Print to print a copy of your self-evaluation form.
 - Under the Process tab, you can view the steps, assignments, associated deadlines and current status for the performance process.
 - Under the Content tab, you can view the sections of the self-evaluation form and click Add Notes and Attachments if applicable.

*Steps are required.

Evaluation Due Date Tue, Feb 13, 2024

Ratings

✓	Rating * TEST Mike Wazowski	Due Sun, Mar 31, 2024	Status Completed on 02/17/2024	Weight 0 %
1	Rating * Amanda Summers	Due Wed, Jul 31, 2024	Status Current	Weight 100 %

After Ratings

2	Meet with Employee to D... * Amanda Summers	Due Wed, Jul 31, 2024	Status Pending	.
Release to Employee				
3	Signature * TEST Mike Wazowski	Due Thu, Aug 15, 2024	Status Pending	

COMPETENCY SECTION | YES / NO ⓘ

SACS Requirements

Items	Description
SACS Requirements - Syllabi Completion	Were your syllabi completed by the first day of the semester?
SACS Requirements - Office Hours	Have you posted your office hours?
SACS Requirements - Curriculum Vita	Is your curriculum vita up to date?

COMPETENCY SECTION | TEXT ONLY ⓘ

Performance Factors - Faculty Duties & Responsibilities

Employee Self-Evaluation: In the text box for each performance factor, provide details on your success and challenges relating to the factor. Supervisor Evaluation of the Target Employee: In the text box for each performance factor, provide a comment relating to the employee's performance.

Items	Description
Learner Success	Enable success among all learners. • Directs and evaluates the learning experience ...
Employee Success	Model persistence, completion, and excellence in learning. • Meets classes on time ...
Community / College Enrichment	Faculty is expected to participate in some kind of Community / College Enrichment ...
Institutional Effectiveness	Foster a culture of adaptability and continuous improvement. • Provides for the care...

NARRATIVE SECTION | TEXT ONLY ⓘ

Employee/Supervisor Comments

Answer the following questions.

Items	Description
Strengths	What are your strengths? List any job accomplishments.
Areas in Need of Improvement	What areas of your job performance need improvement? List ideas to help you improve.
Supervisor Assistance	How can your supervisor assist you in your performance?
Overall Job Performance	How would you assess your overall job performance during the evaluation period?

Add Notes & Attachments

+ Add Notes & Attachments

Check the Status/Progress of Your Evaluation

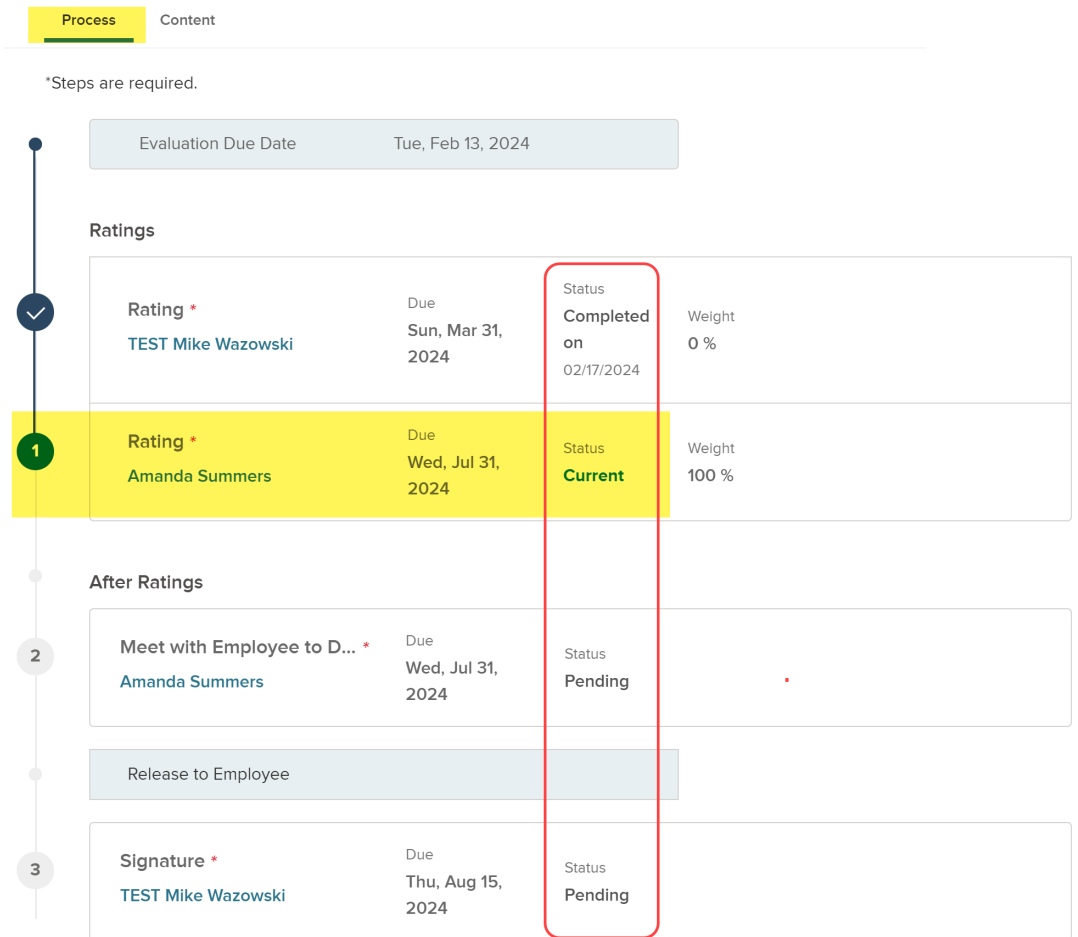
Follow these steps to check the status of your performance evaluation:

1. Log into NEOED.
2. Select the Performance link on the left, under the Overview tab, in the My Current Evaluation box, click the link to open your evaluation.

The screenshot shows the 'Performance' section of the NEOED interface. On the left is a navigation menu with options: Dashboard, Tasks, People, Performance (highlighted), Onboard, Forms, and Reports. The main content area is titled 'Performance' and has tabs for 'Overview', 'My Evaluations', and 'Journal Hub'. Under 'My Tasks', there is a message: 'You have zero tasks to do! Check back later for any new tasks.' To the right, under 'My Current Evaluation', there is a progress bar for 'Annual Teaching Faculty v2 (due 08 / 31 / 2024)'. The progress bar shows three stages: 'Before Ratings', 'Rating' (which is currently active and highlighted), and 'Approval'.

3. Your evaluation summary will be displayed. The next step in your evaluation process and the status of completion is available under the Process tab. In the example below, the employee completed his self-evaluation. The next step is for his manager to complete the supervisor's evaluation form and meet with him to discuss his performance.

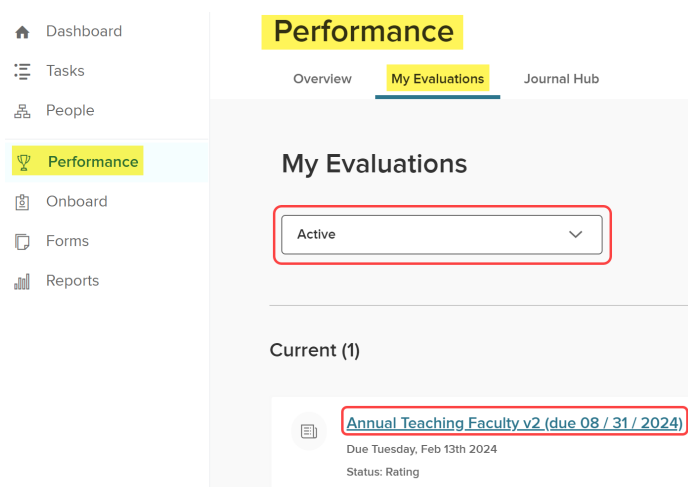
The screenshot shows the 'Annual Teaching Faculty v2 (due 08 / 31 / 2024)' evaluation summary page. The top navigation bar includes 'Dashboard', a search bar, and the user profile 'TEST Mike Wazowski'. Below the navigation bar, there are tabs for 'Employees', 'Library', and 'Reports'. The main content area features a profile card for 'TEST MIKE WAZOWSKI' with a cartoon character icon, his position 'PT HR Assistant (TEST)', and his division 'President's Office'. To the right of the profile card, there are two summary boxes: 'EVALUATION DETAILS' showing 'Current Status: Rating' and 'Type: Periodic', and 'EMPLOYEE DETAILS' showing 'Position: PT HR Assistant (TEST)', 'Division: President's Office', and 'Department: Human Resources'. Below these boxes, there is a 'Process' tab and a 'Content' tab. The 'Process' tab is active, showing a progress bar with a single step: 'Evaluation Due Date Tue, Feb 13, 2024'. A message '*Steps are required.' is displayed above the progress bar. There is also an '+ Add Task' button and a 'Ratings' section at the bottom.



Locate Your Completed Evaluation(s)

Follow these steps to locate and view your evaluation(s).

1. Log into NEOED.
2. Select the Performance link, My Evaluations tab. A link to your active evaluations will automatically display. To search past evaluations, select the evaluation status you want to search from the drop-down menu (i.e., Current (Active), Completed, Other (Archived) or All). Click the link for the evaluation you want to open/view.



- The completed evaluation form will be displayed. Scroll down the screen to view the entire document.
 - The check box options under Settings on the left allow you to select the sections of the form that you would like to view/include.
 - Click Print to print the document.
 - Click Go to Evaluation Details to view the evaluation summary page.

Print Preview

TEST Mike Wazowski
PT HR Assistant (TEST)

Direct Manager:
Amanda Summers

Lee COLLEGE

TEST Mike Wazowski
Teaching Faculty Test Eval
Due Date: Thu, Aug 31, 2023

General Information

Position PT HR Assistant (TEST)	Department Human Resources	Evaluation Type Periodic
Division President's Office	Job Description	

Ratings Summary :

Rater	Type
-------	------

Go To Evaluation Details Print

Activate Windows
Go to Settings to activate Windows.

- From the evaluation summary page:
 - Click Print to print a copy of your evaluation form.
 - Under the Process tab, you can view the steps, assignments, assigned deadlines and completion dates.

TEST MIKE WAZOWSKI

Position:
PT HR Assistant (TEST)

Division:
President's Office

View Org Chart

Manager(s)

Teaching Faculty Test Eval
Due Date: Thu, Aug, 31, 2023
Archived: Yes

Print

EVALUATION DETAILS

Current Status: Completed
Type: Periodic

EMPLOYEE DETAILS

Position: PT HR Assistant (TEST)
Division: President's Office
Department: Human Resources

Process Content + Add Task

*Steps are required.

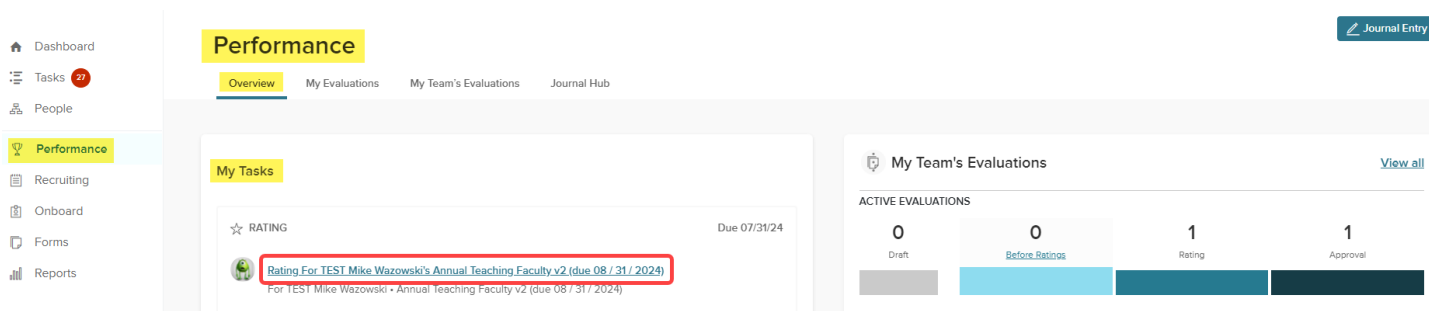
Evaluation Due Date	Thu, Aug 31, 2023
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Activate Windows
Go to Settings to activate Windows.

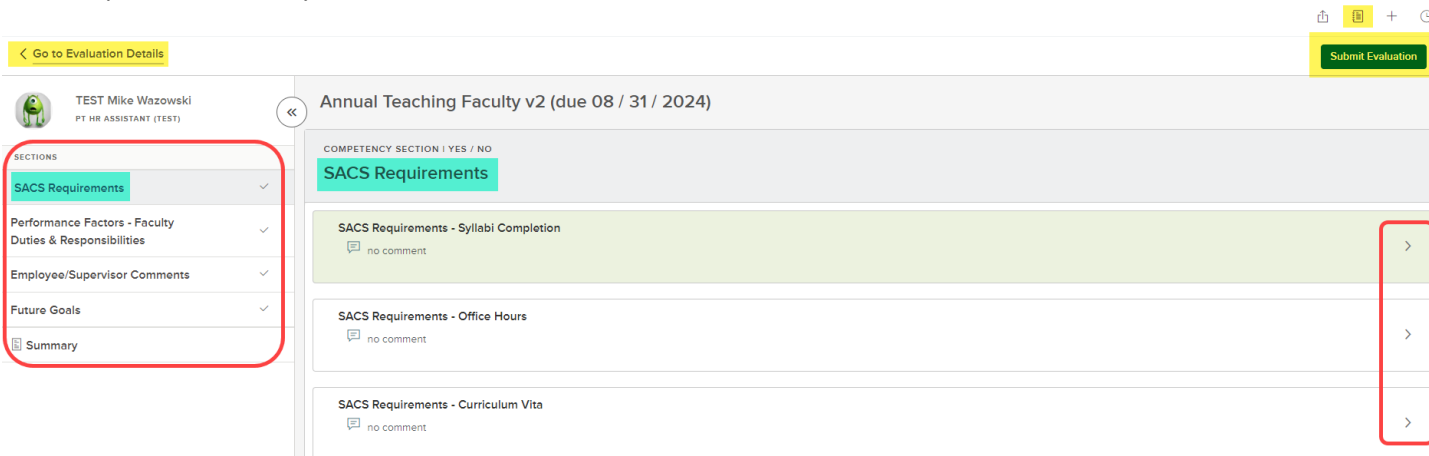
Manager's Perspective

Completing the Supervisor Evaluation Form

1. There are two ways to log into NEOED to access the Supervisor Evaluation Form:
 - a. The system will send you an automated email making you aware that a task has been assigned to you. Click the link embedded in the email to log into NEOED to access the form.
 - b. If you do not receive an email, you can access the Perform module anytime by logging into NEOED using the directions provided in the Getting Started: Log In to NEOED section provided above.
2. From the Dashboard, select the Performance link on the left. Under the Overview tab, in the My Tasks box, click the appropriate evaluation link.

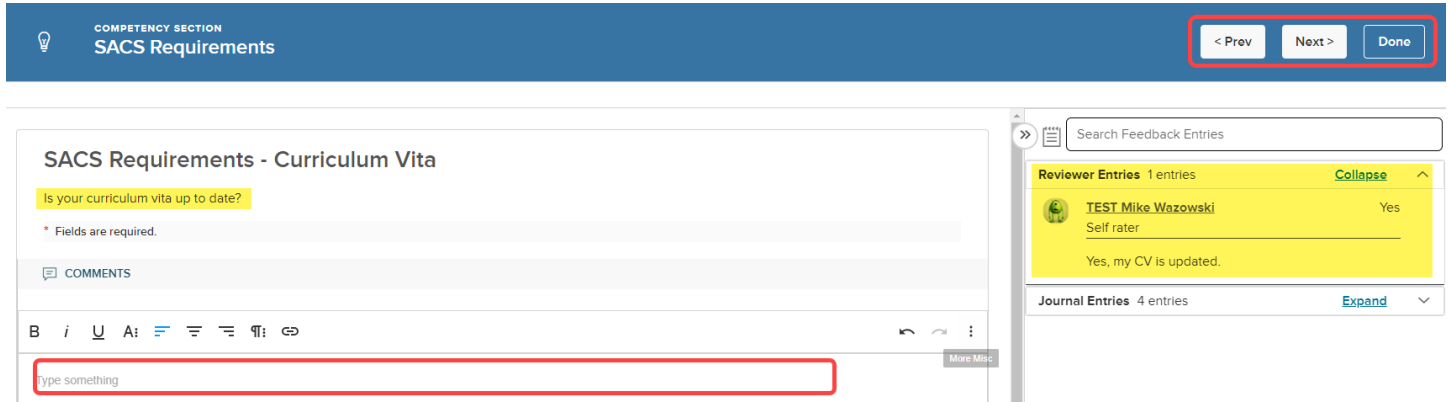


3. The Supervisor Evaluation Form will appear. The different sections of the evaluation will populate on the left. If you click on a section, it will open and display in the main part of the page. In the example below, the SACS Requirement section (on the Teaching Faculty Evaluation Form) was selected and is displayed. You may move around the sections and complete them in any order.

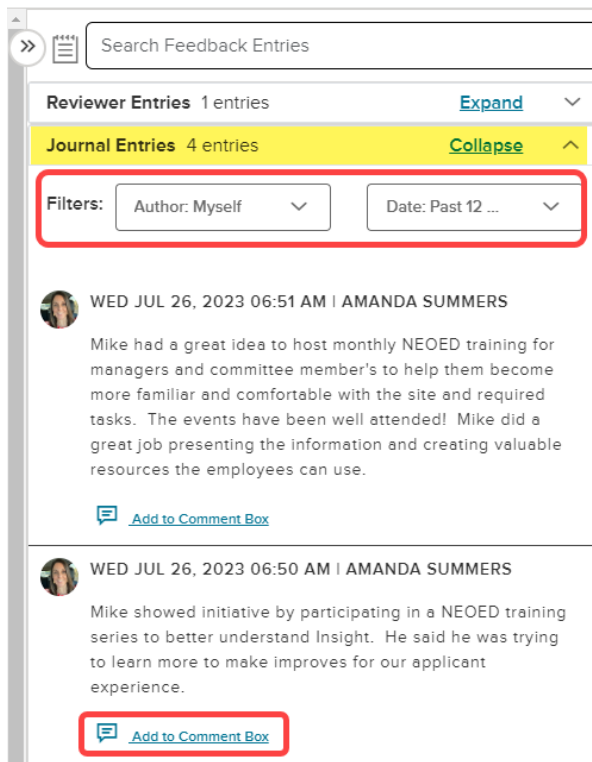


- Click the > on the right to view a question and make a comment.
- Click the journal icon in the upper right to access the Journal Hub.
- Click the Go to Evaluation Details on the left to view the steps, assignments and deadlines associated with this performance evaluation.
- Click Submit Evaluation when you are finished and ready to forward the evaluation to the next step.

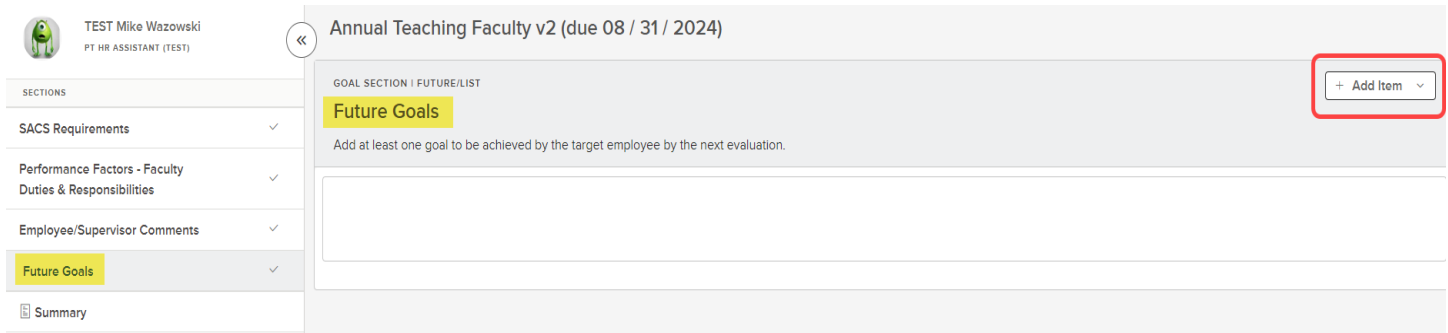
- To fill out your Supervisor Evaluation Form, click the > to the right of each question. The question and a comment box will appear. Answer the question.



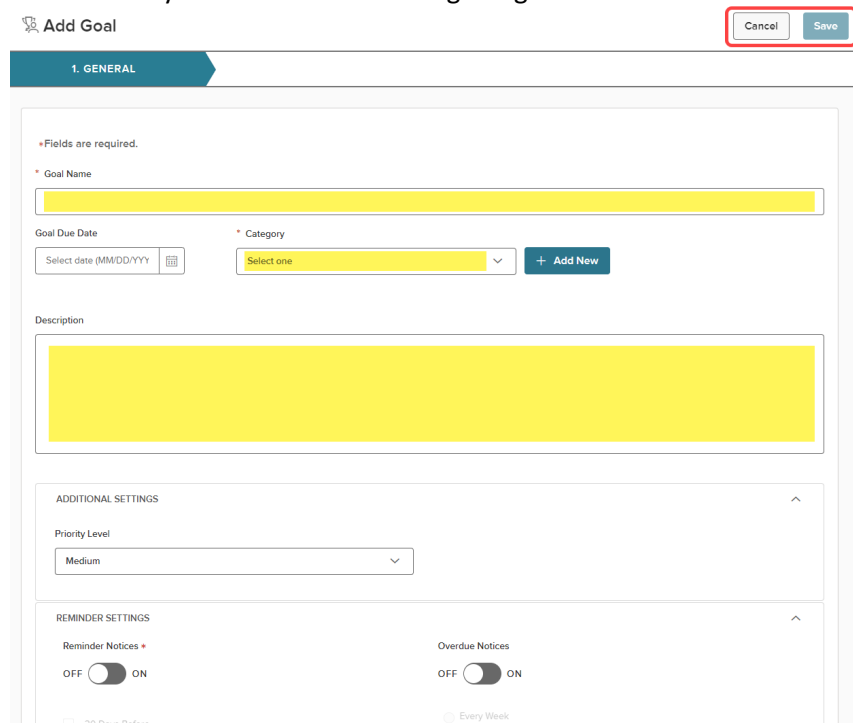
- Select the Next > link on the right to proceed to the next question or < Prev to return to the previous question/response.
- Select Done to return to the home page for the Supervisor Evaluation Form.
- If available, the Reviewer Entries, Journal Entries and/or Writing Assistant tabs will populate on the right. They are resources to help you develop content for your evaluation.
 - Reviewer Entries – Displays how the employee responded to this question on his/her Self-Evaluation Form.
 - Writing Assistant – Displays text to help you draft your response to the question. Click the Add to Comment Box to copy the entry into your response to the question. Once copied, be sure to edit the comment to ensure it is applicable and reads appropriately.
 - Journal Entries – Displays journal entries pertaining to this employee that you made or that were shared with you. Use the filters to search for entries by author or date. Click Add to Comment Box to copy the entry into your response to the question. Once copied, be sure to edit the comment to ensure it is applicable and reads appropriately.





- In the Goals from Previous Performance Evaluation section, add comments/feedback pertaining to the goals that were established for the employee last year. If goals are not available (e.g., the employee is new and was not issued goals last year or the employee's previous evaluation was not completed causing goals to be unavailable), skip this section by clicking Next Section > in the upper right corner.
- In the Future Goals section, click + Add Item, then select New Goal to add a goal for the employee to work on next year. The Add Goal flyout page will appear on the right.

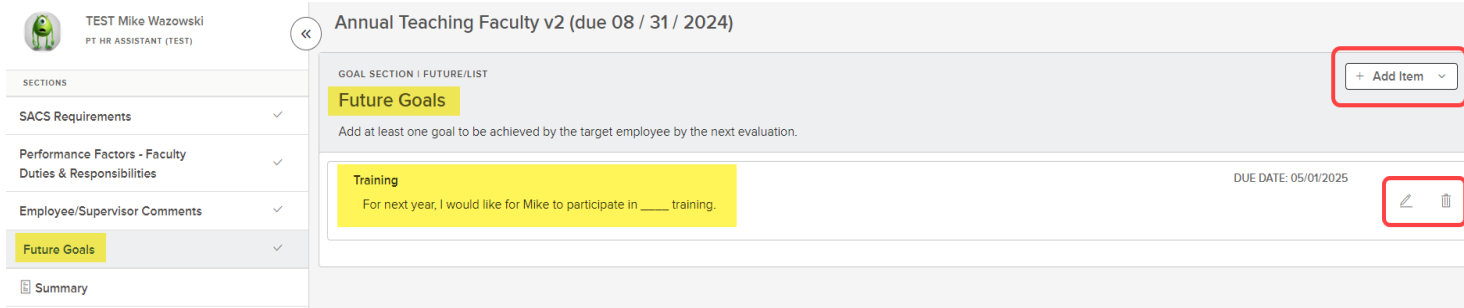


Type a name for the goal. Select a category for the goal (i.e., Organizational, Departmental or Individual). Type the goal in the Description field. It is not required, but you have the option to assign a due date, priority level and reminder notices. Click Save when you are finished entering the goal.

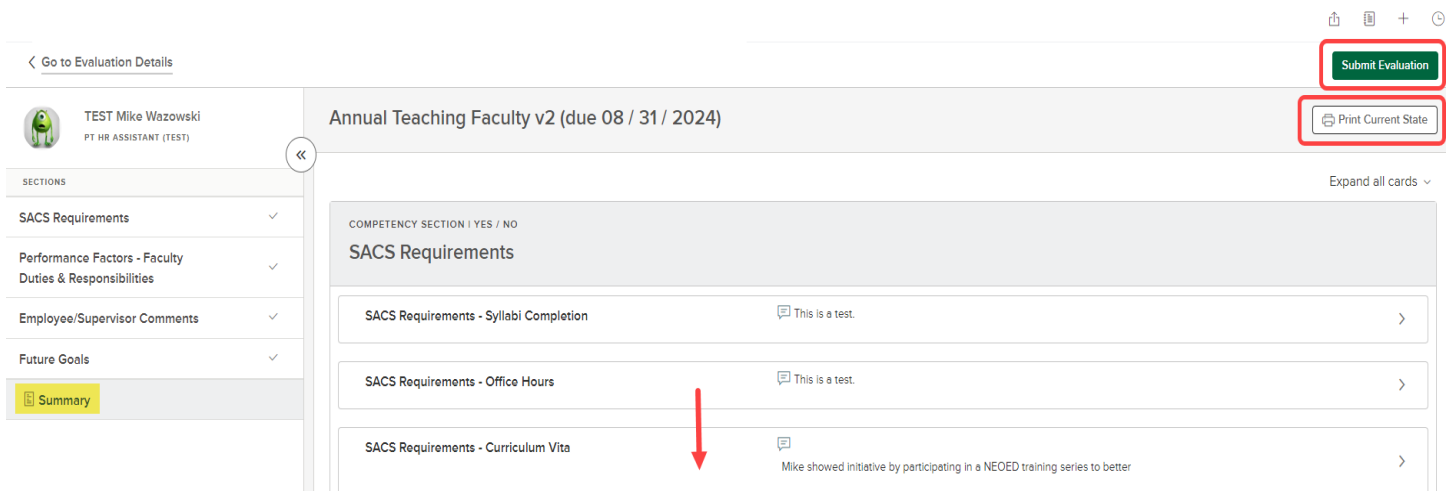


The goal(s) will appear in the Future Goals section.

- Click  to edit a goal.
- Click  to delete a goal.
- Click + Add Item, New Goal to add a goal.



7. Select the Summary section on the left to review your comments before submitting the Supervisor Evaluation Form.
 - Click Print Current State to print a draft of the document.
 - Click Submit Evaluation to forward the Supervisor Evaluation to the next step in the evaluation process.



8. You will be asked to confirm that you want to submit your Supervisor Evaluation Form.
 - If yes, click Continue to submit your form. You will receive a message letting you know that your document was successfully forwarded to the next level supervisor. Once you submit the form, you cannot make changes.
 - Click Cancel to go back and make changes.
9. The evaluation summary page will display. **The next step in the evaluation process is to meet with the employee to discuss his/her performance (see screenshot below).** During the meeting, you will discuss the comments made on the employee's Self-Evaluation Form, your Supervisor Evaluation Form and if applicable, whether changes need to be made to the employee's job description.
 - After the meeting, click Go to Task, then Complete Task to document the date and time you met with the employee. You have the option to add comments about the meeting in the Comments field.

Task Detail

Cancel **Complete Task**

Title

Meet with Employee to Discuss Evaluation

Related to

Annual Teaching Faculty v2 (due 08 / 31 / 2024)

Due Date

07/31/2024

Description

Schedule a meeting to discuss the evaluation with the target employee. Mark this task as complete once the meeting has concluded (add comments to the task completion comment box as needed to describe how the meeting went, if the employee had questions or concerns, etc.)

Comments

[Redacted comment box]

- Click Print to print a copy of the combined evaluation forms.
- Under the Process tab, you can view the steps, assignments, associated deadlines and current status for the performance process.
- Under the Content tab, you can view the sections of the self-evaluation form and add notes and attachments if applicable.



TEST MIKE WAZOWSKI

Position:

PT HR Assistant (TEST)

Division:

President's Office

[View Org Chart](#)

Annual Teaching Faculty v2 (due 08 / 31 / 2024)

Due Date: Tue, Feb. 13, 2024

Cancel

Go to Task

Print

EVALUATION DETAILS

Current Status: Approval

Type: Periodic

Evaluation Program: Teaching Faculty v2

EMPLOYEE DETAILS

Position: PT HR Assistant (TEST)

Division: President's Office

Department: Human Resources

Process Content

*Steps are required.

Evaluation Due Date Tue, Feb 13, 2024

Ratings

Rating	Due	Status	Weight	
TEST Mike Wazowski	Sun, Mar 31, 2024	Completed on 02/17/2024	0 %	...
Amanda Summers	Wed, Jul 31, 2024	Completed on 02/19/2024	100 %	...

After Ratings

2 Meet with Employee to Discuss Evaluation - Amanda Summers	Due Wed, Jul 31, 2024	Status Current	Go to Task	...
Release to Employee				
3 Signature - TEST Mike Wazowski	Due Thu, Aug 15, 2024	Status Pending		...

10. For the last step, the system will ask for your signature.

Track the Status of Your Employees' Evaluations

1. From the Dashboard, select the Performance link, Overview tab. The My Team's Evaluations box on the right displays a brief overview of the various evaluation statuses and overdue tasks.
 - Click View All on the right to open the My Team's Evaluation tab or click one of the colored boxes to see the evaluations currently in each state (e.g., Draft, Before Ratings, Rating and Approval).

The screenshot shows the Performance Overview page. On the left is a navigation sidebar with 'Performance' selected. The main content area has a 'My Tasks' section with a message: 'You have zero tasks to do! Check back later for any new tasks.' On the right is a 'My Team's Evaluations' summary box, outlined in red. It shows 'ACTIVE EVALUATIONS' with counts: Draft (0), Before Ratings (0), Rating (0), and Approval (2). Below this is an 'OVERDUE TASKS' section with a circular gauge showing 1 overdue task. A 'Sign (1)' button is present. At the bottom, there is a list of 'ALL OVERDUE TASKS (1)' with one entry: 'Sign TEST Annual Non-Teaching Employee (due 08 / 31 / 2023) f...' with a due date of 08/15/23.

2. From the My Team's Evaluation tab, you can also search for an evaluation by an employee's name, sort the results via date, or filter by employee name.


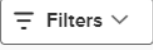

The screenshot shows the Performance 'My Team's Evaluations' page. The 'My Team's Evaluations (2)' summary box is at the top, showing counts for Draft (0), Before Ratings (0), Rating (0), and Approval (2). Below the summary are 'Sort' and 'Filters' buttons, both outlined in red. To the right is a search bar with the placeholder text 'Search by Employee or Evaluation name', also outlined in red. Below these are 'All Evaluations' listed in a table:

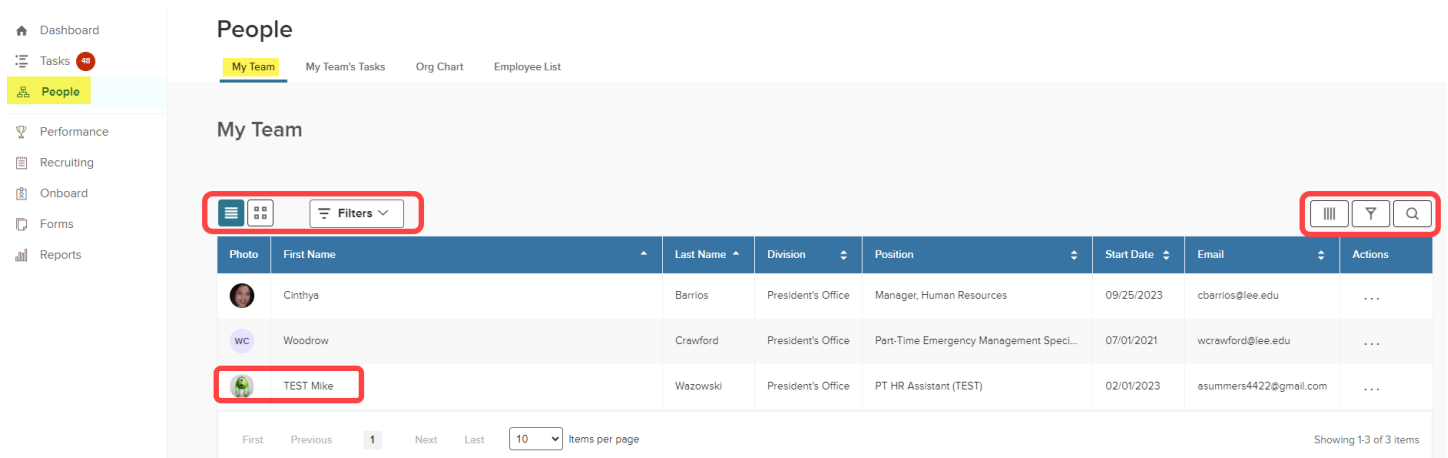
Task	Employee	Status
TEST Annual Non-Teaching Employee (due 08 / 31 / 2023) Due Thursday, August 31, 2023	Abbey Mourer	Before Ratings
Annual Teaching Faculty v2 (due 08 / 31 / 2024) Due Tuesday, February 13, 2024	Test Mike Wazowski	Approval

View Completed Evaluations for Your Employees




Managers can access all the evaluations of everyone within their hierarchy by navigating to the employee's profile.

1. Select the People link on the left. Under the My Team tab, click the name of the employee you want to view.

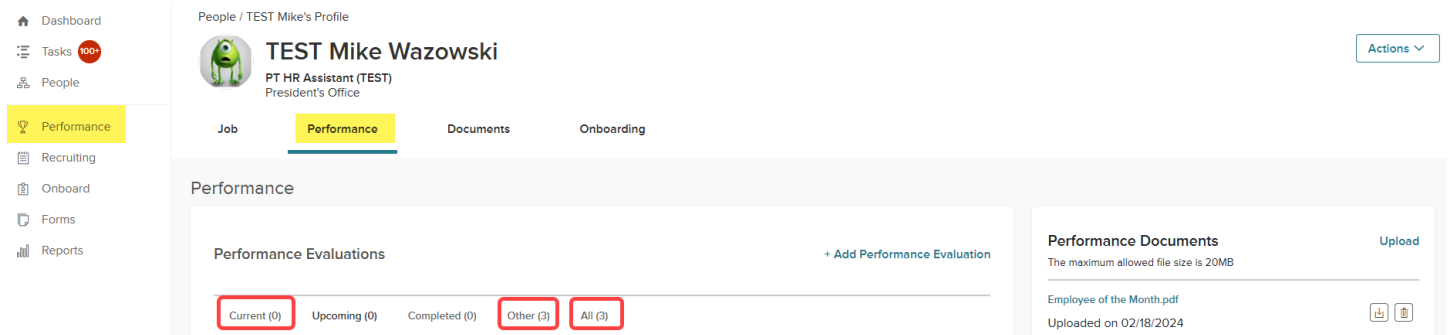
- Click  to change how you view employee names (i.e., list/grid view (as shown in the screenshot below) or card/box view).
- Click  to filter employees by Direct Reports Only or Entire Hierarchy.
- Click  to add columns to the data populating on your screen, apply an advanced filter if applicable or open search fields under each column header.



The screenshot shows the 'People' page with the 'My Team' tab selected. The table displays the following data:

Photo	First Name	Last Name	Division	Position	Start Date	Email	Actions
	Cinthya	Barrios	President's Office	Manager, Human Resources	09/25/2023	cbarrios@lee.edu	...
	Woodrow	Crawford	President's Office	Part-Time Emergency Management Speci...	07/01/2021	wcrawford@lee.edu	...
	TEST Mike	Wazowski	President's Office	PT HR Assistant (TEST)	02/01/2023	asummers4422@gmail.com	...

2. After selecting the name of the appropriate employee, click the Performance tab. Evaluations saved in NEOED will populate here. Click the appropriate status in the Performance Evaluations drop down menu to view Current, Completed, Other (Archived) or All evaluations for this employee.



The screenshot shows the 'Performance' page for 'TEST Mike Wazowski'. The 'Performance' tab is selected. The page displays the following information:

- Performance Evaluations:** A dropdown menu is set to 'Current (0)'. Other options include 'Upcoming (0)', 'Completed (0)', 'Other (3)', and 'All (3)'.
- Performance Documents:** A document titled 'Employee of the Month.pdf' is listed, uploaded on 02/18/2024.

3. Select the evaluation title or download links to view the documents.

The screenshot shows the 'People / TEST Mike's Profile' page in the Perform HR system. The 'Performance' tab is selected, and the 'Performance Evaluations' section is active. The evaluation 'TEST EVALUATION 1' is highlighted with a red box. A download icon for this evaluation is also highlighted with a red box.

Additional Information

Revisions to Self-Evaluation and Supervisor Evaluation Forms

Once an employee submits the Self-Evaluation Form, he/she cannot make revisions. However, if the employee makes his/her supervisor aware, the direct supervisor may be able to add a note documenting the employee's change request on the Supervisor Evaluation Form. Likewise, a manager cannot make a revision to the Supervisor Evaluation Form once it is submitted.

Journal Entries

Journal Entries are notes that employees and supervisors can enter in Perform to document and recall performance-related items that occur throughout the year. The entries are intended to be a tool to foster and encourage communication between supervisors and direct reports and can be used to develop content to include on the evaluation forms.

- Journal entries are private unless made viewable using the share with feature.
 - As an employee, Journal Entries can be private or shared with your supervisor(s) and are available for review when completing your evaluation.
 - As a supervisor, Journal Entries that you enter for your employees can be private or shared with the employee and are also available for review when completing the employee's end-of-year evaluation.
- Journal entries can be edited, printed, deleted or archived by the creator only.

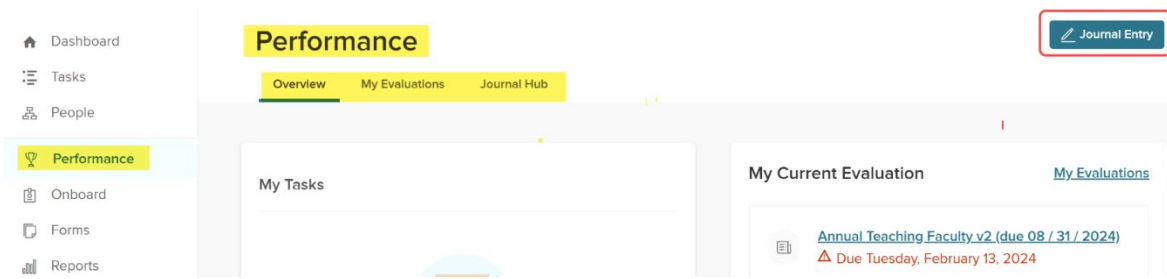
Submit a Journal Entry

There are multiple places to access/submit a Journal Entry:

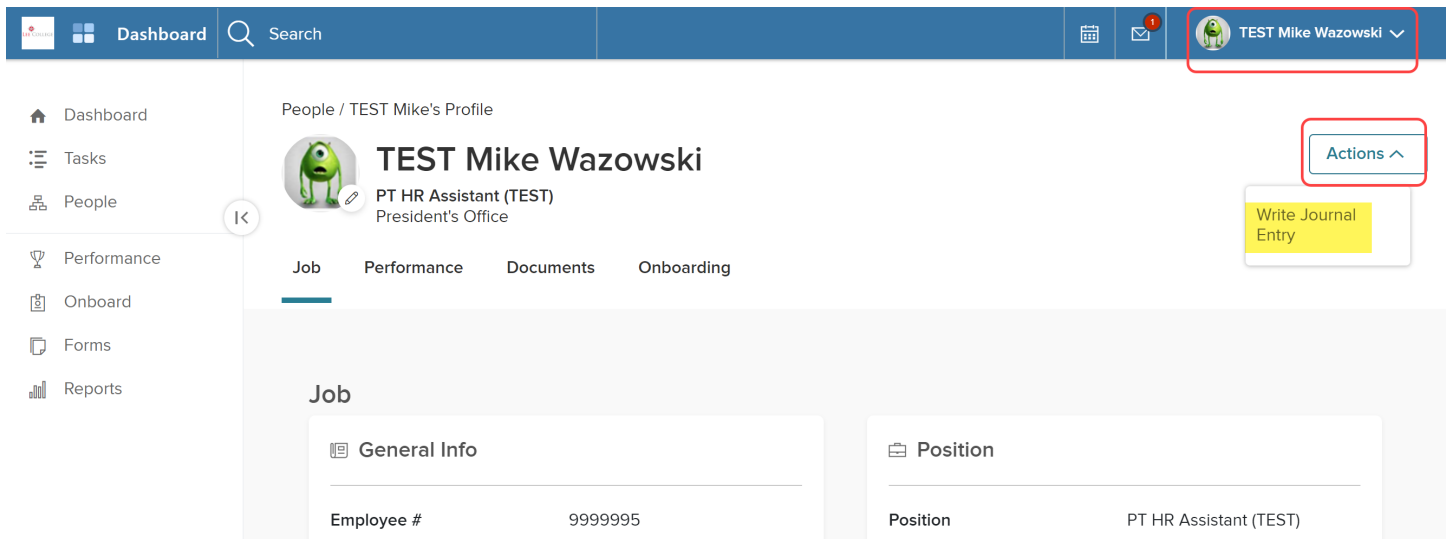
1. From the **Dashboard link**, in the Quick Actions box click Write a Journal Entry.


The screenshot shows the 'Dashboard' page in the Perform HR system. The 'Quick Actions' box is visible, and the 'Write a Journal entry' button is highlighted in yellow.

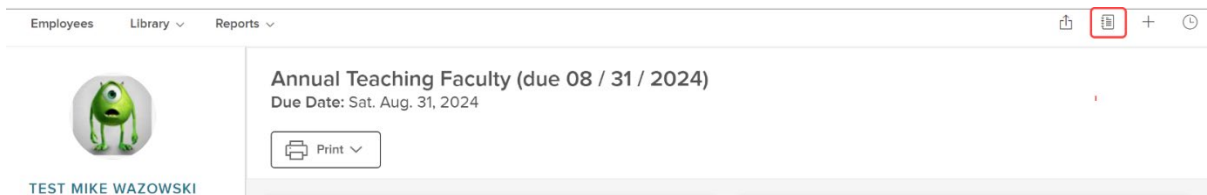
- From the **Performance** link, under any of the tabs (i.e., Overview, My Evaluations or Journal Hub), click the Journal Entry link in the upper right corner.



- From **My Profile** – Click your name in the upper right corner, My Profile, Actions, Write a Journal Entry.

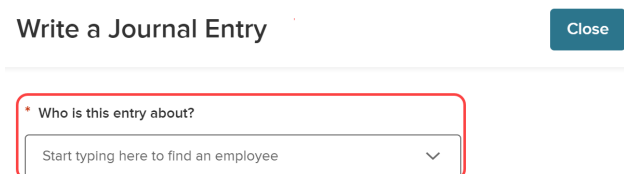


- From your **evaluation details page or evaluation forms**, click the  journal icon in the upper right to access the Journal Hub.



Follow these steps to submit a journal entry:

- A fly out window opens on the right. Select the name of the person the entry is about. Supervisors have the option to submit a note for themselves or an employee within their hierarchy.



2. Type your note in the New Entry box.

- As an employee, check the box for Manager(s) to share the note with your direct supervisor or Manager's Manager to share the note with the supervisors in your chain of command. As a supervisor, you have the same options, but you can also elect to share the note with an employee.
- If appropriate, select Discard Draft or Keep as Draft.
- Click Submit Journal Entry, then Close when you are finished.

Write a Journal Entry Close

* Who is this entry about?

TEST Mike Wazowski

New Entry Past Entries

B *i U A: = = ¶: ↻ ↺ ↻*

Did you know? You can tag your journals with Competencies and Goals from recent/upcoming evaluations by typing "@" along with the name of the item. Tagging is only applicable for one user at a time.

Who do you want to share this entry with?

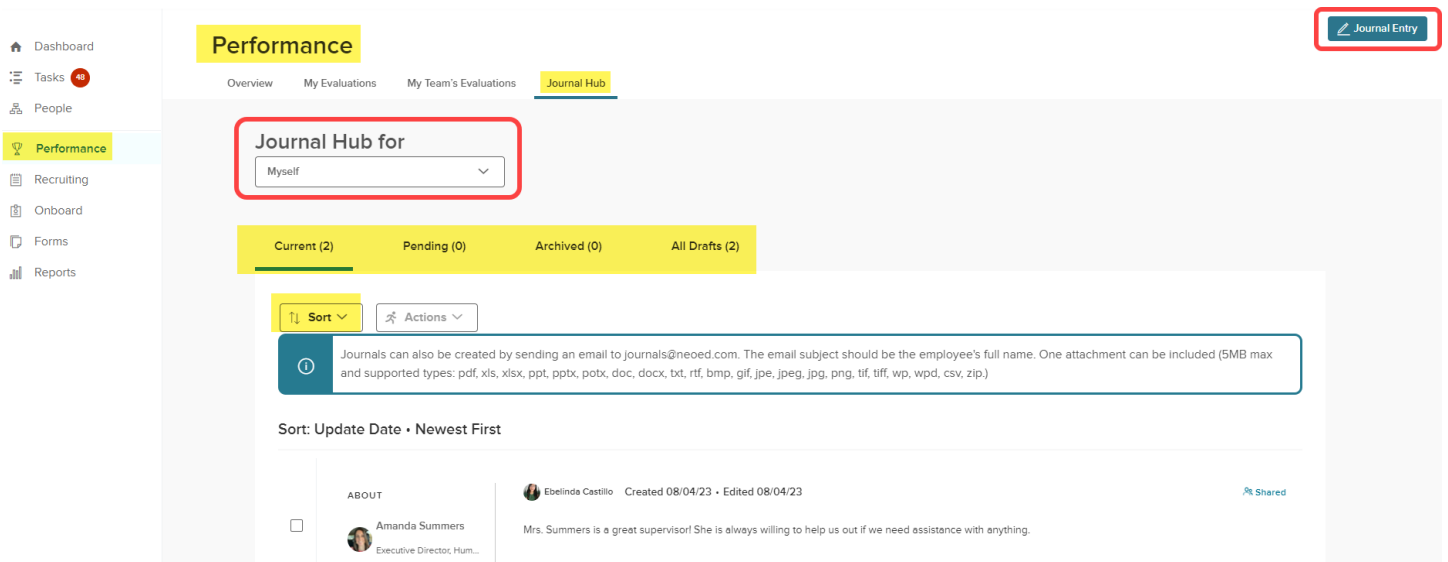
Employee
 Manager(s) ⌵
 Manager's Manager

Discard Draft Keep as Draft Submit Journal Entry

Journal Hub

The Journal Hub displays your Current, Pending, and Draft journal entries. To access the hub, select the Performance link on the left and click the Journal Hub tab.

- From the Journal Hub for drop down menu, select who you want to view entries for (i.e., yourself or one of your employees).
- Select the Current, Pending, Archived or All Drafts tab to view entries in each category.
- Click Sort to organize the entries by creation or update dates.
- Click the blue Journal Entry button in the upper right corner of the screen to submit a new journal entry.



Reviewer Entries

Reviewer entries are past evaluation ratings and comments that were completed within NEOED. While completing the performance evaluations, the past ratings for each criterion will appear on the right side of the screen. It will indicate who the rater was, the evaluation date, the rating and any comments made for that criterion. Reviewer entries will not appear until after the first evaluation has been completed within the NEOED platform.

Notifications

NEOED will notify you, via email, when there is a task that requires your action. Within the email will be a hyperlink to the task.

Questions/Assistance

If you have questions or need assistance, contact the Human Resources Office at hr@lee.edu or (281) 425-6875.