MCC Administrative-Professional/Technical (APT) Staff

EMPLOYEE USER GUIDE – NEOED PERFORM

(Revised November 2024)

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Introduction

The following is a customized, step-by-step guide to walk you through the NEOED Perform evaluation process for MCC APT Employees. **To avoid pitfalls and corrections later, we strongly encourage you to follow this user guide.** Please contact MCC's NEOED Perform Administrator if you need assistance.

Disclaimer: Please note that the screenshots included in this guide are for illustrative purposes only. The content and due dates may be different than what you see in NEOED Perform.

The NEOED Perform Process

As of June 2024, the APT Employee Performance Plan cycle runs from **June 1 – May 31**.

1. All APT Employees will be rated on several core competencies. (The Supervision/management competency will not apply to everyone.) Please note that the core competencies may be modified from year-to-year.

   - Planning, Organizing, and Coordinating
   - Interpersonal Relations and Communications
   - Problem Analysis and Decision Making
   - Organizational Commitment and Adaptability/Professional Contributions and Accomplishments
   - Supervision/management
   - JOB DUTIES

2. The "Job Duties" competency relates to how well you fulfill your job duties *as described in your official job description. You will not need to enter job duties*, because your job description will be electronically available to you and your Supervisor in Perform.
3. You will enter two goals, which must be approved by your Supervisor. The goal setting and approval process should be completed within 30 days of the beginning of the evaluation cycle (or of the start date of a new Employee).
4. In late November, your Supervisor will complete a "Mid-Year Progress Review Check-in" to document your progress toward meeting your goals and the expectations of the core competencies included in your Performance Plan (this step may not apply to new hires, depending on when they start).
5. In April, you will be asked to provide a "Goal Progress Update Check-in" to your Supervisor.
6. After you have submitted your Goal Progress Update Check-in, your Supervisor will complete your end-of-evaluation-cycle ratings.
7. After your *Second-level* Supervisor has reviewed and approved your evaluation, your Supervisor will sign off on it and it will be released to you for viewing. Your Supervisor should meet with you to discuss your evaluation.

The NEOD Perform Process, continued:

A summary of the steps and timeline of the NEOED Perform process follows. The remainder of this Guide will go into detail about how to complete each step.

Before Ratings

#	Step	Step Due Date	Step is required
1	Employee Adds Two Goals Employee	14 Days after Evaluation creation date	Yes
2	Signature Manager	28 Days after Evaluation creation date	Yes
3	Signature Employee	30 Days after Evaluation creation date	Yes
4	Supervisor Completes Performance Plan Mid-Year Progress Review/Check-In Manager	180 Days after Evaluation creation date	Yes
5	Signature Employee	185 Days after Evaluation creation date	Yes
6	Signature Manager	190 Days after Evaluation creation date	Yes
7	Employee Provides Goals Progress Update Employee	32 Days before Evaluation due date	Yes

Ratings

#	Step	Step Due Date	Step is required
8	Rating Manager(s)	10 Days before Evaluation due date	Yes

OFF ON Entire Section Due Date

After Ratings

#	Step	Step Due Date	Step is required
9	Approval & Signature Manager's Manager	3 Days before Evaluation due date	Yes
10	Signature Manager	2 Days before Evaluation due date	Yes
	Release to Employee		
11	Signature Employee	0 Days before Evaluation due date	Yes

OFF ON Entire Section Due Date

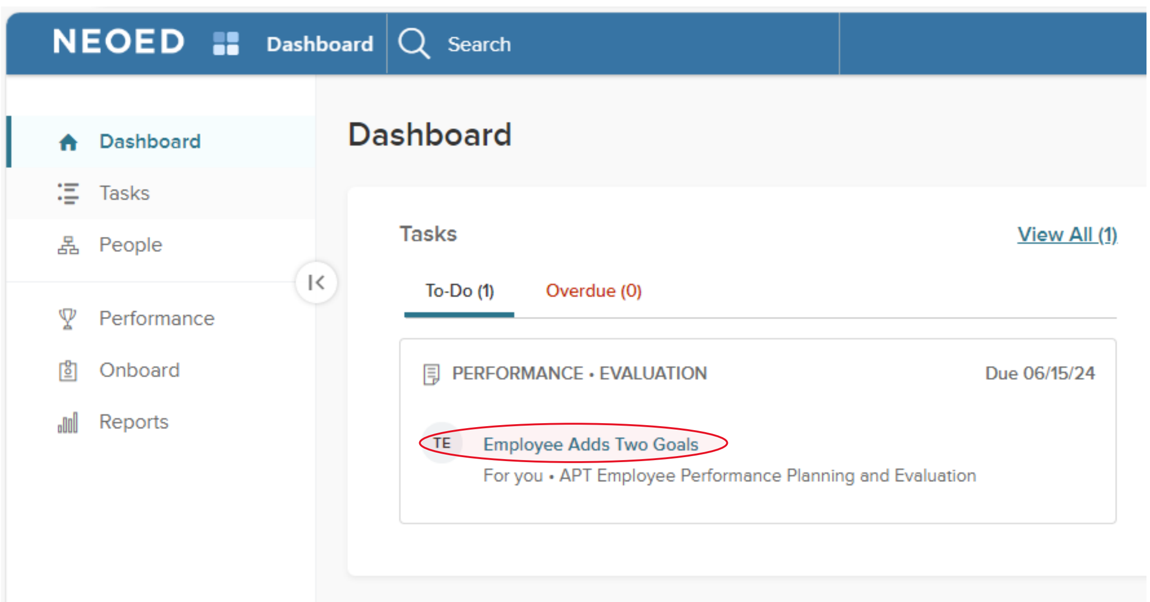
Evaluation Due Date

Account Activation/Access

If you are new to NEOED Perform, you will be sent an email *from NEOED* to activate your account. A username will be provided in the email, but you will need to set your password. Your username will either be your MCC email address, or your firstname.lastname. Note that activation links are good for five days. If your activation link has expired or you need a password reset, contact the MCC NEOED Perform Administrator. **After your account is activated**, go to www.neoed.com for future logins.

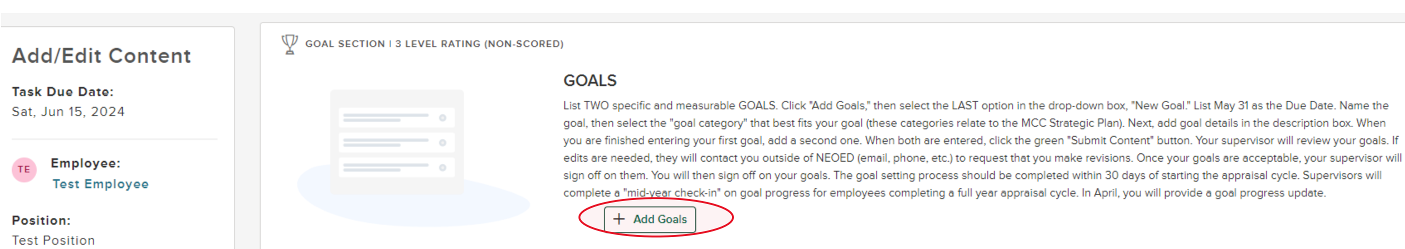
The NEOED Perform Dashboard

Once you log in to NEOED, you will see your Perform dashboard. The main page of the dashboard will give you an overview of any tasks due or overdue, give you quick access to write a journal entry (described later), or view your current evaluation. It will also list your Supervisor/Manager and direct reports (if applicable). Once your current evaluation is active, you will receive an email notifying you that it is time for you to enter your evaluation goals. You will also see the task appear on your dashboard (see example below).



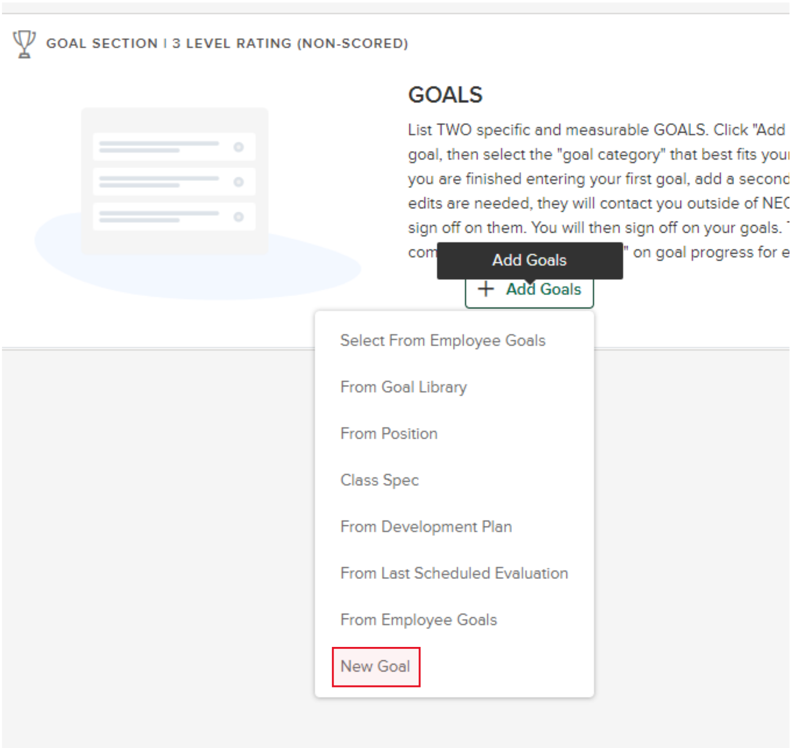
Adding Goals

Click the task link that says "Employee Adds Two Goals." Read the instructions listed in the Goals section on the screen, then click the +Add Goals button.

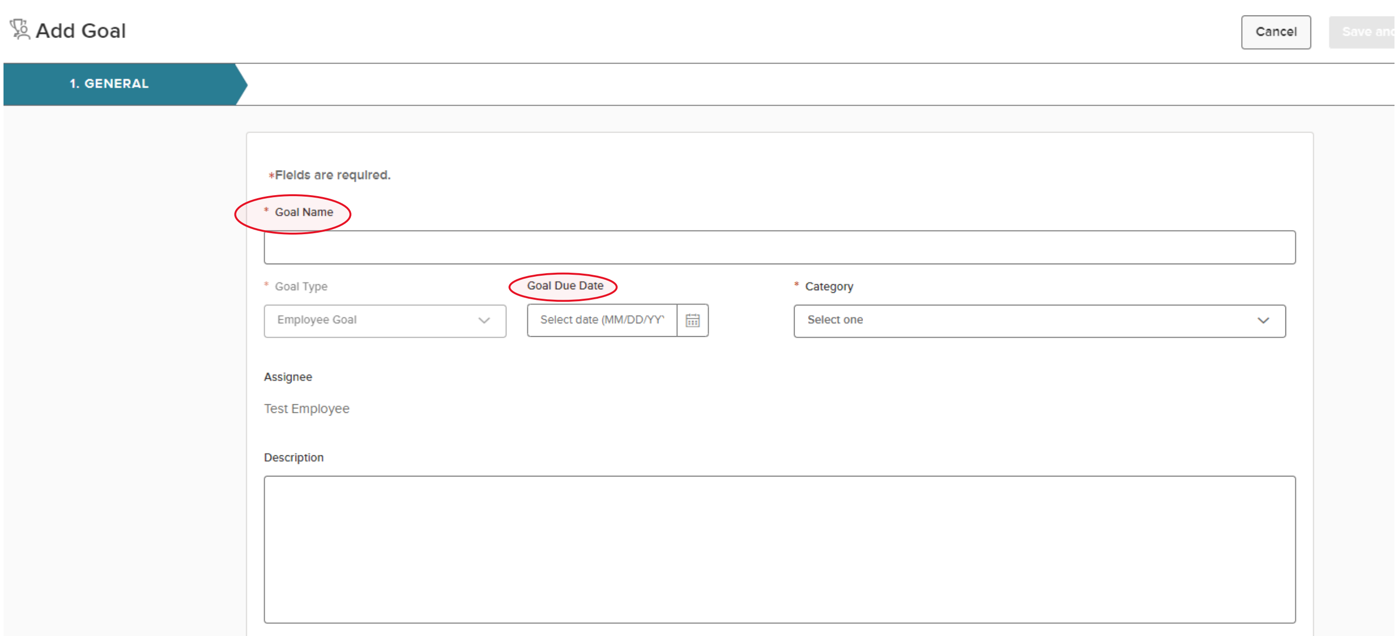


Adding Goals, continued:

A drop-down box will give you several options. Click the LAST option, "New Goal."

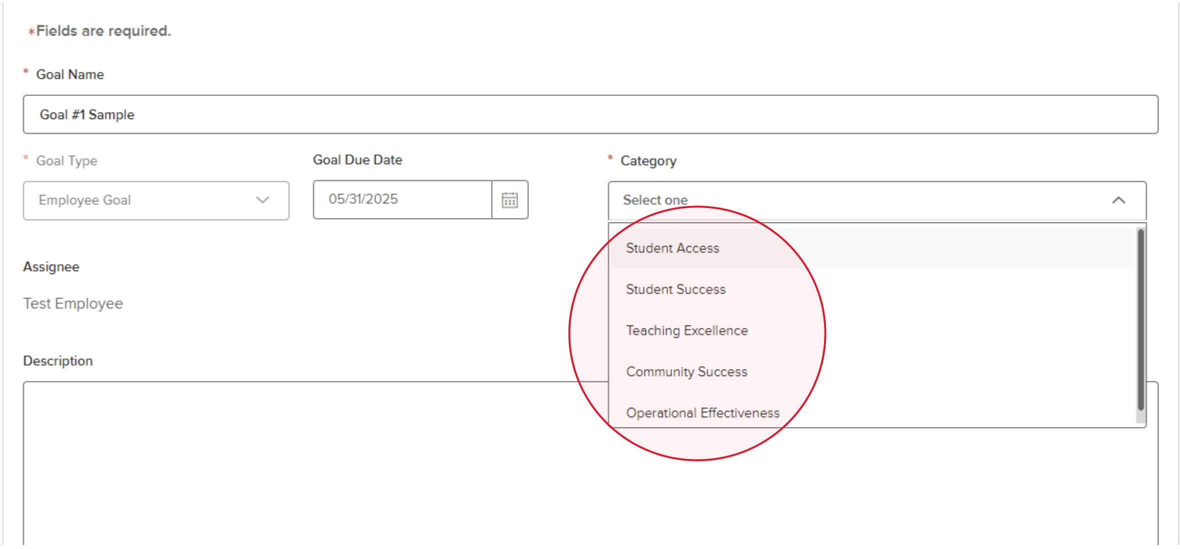


Enter a goal name. Enter May 31 as the Goal Due Date.

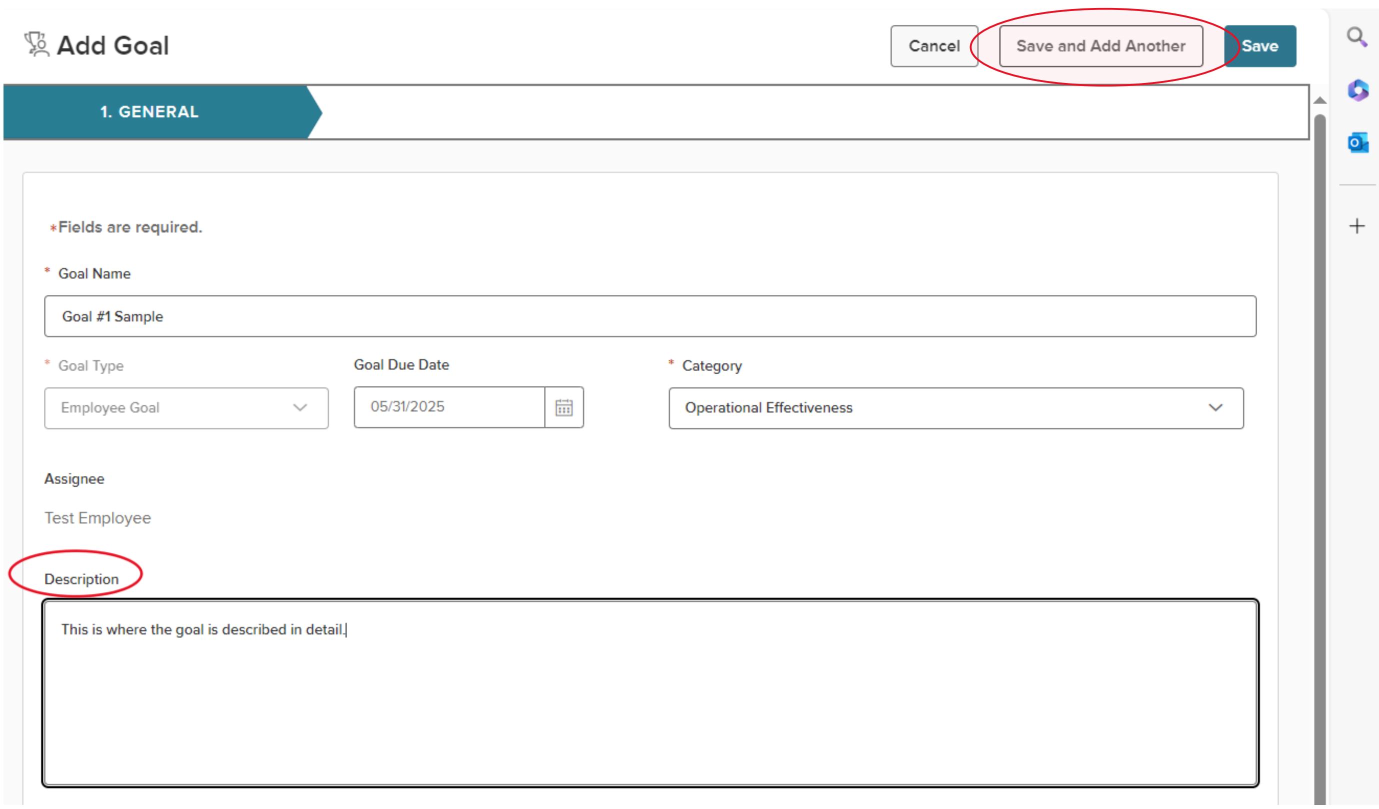


Adding Goals, continued:

Under "Category," select which goal category best fits your goal. Note: These categories are the major objectives of MCC's Strategic Plan.



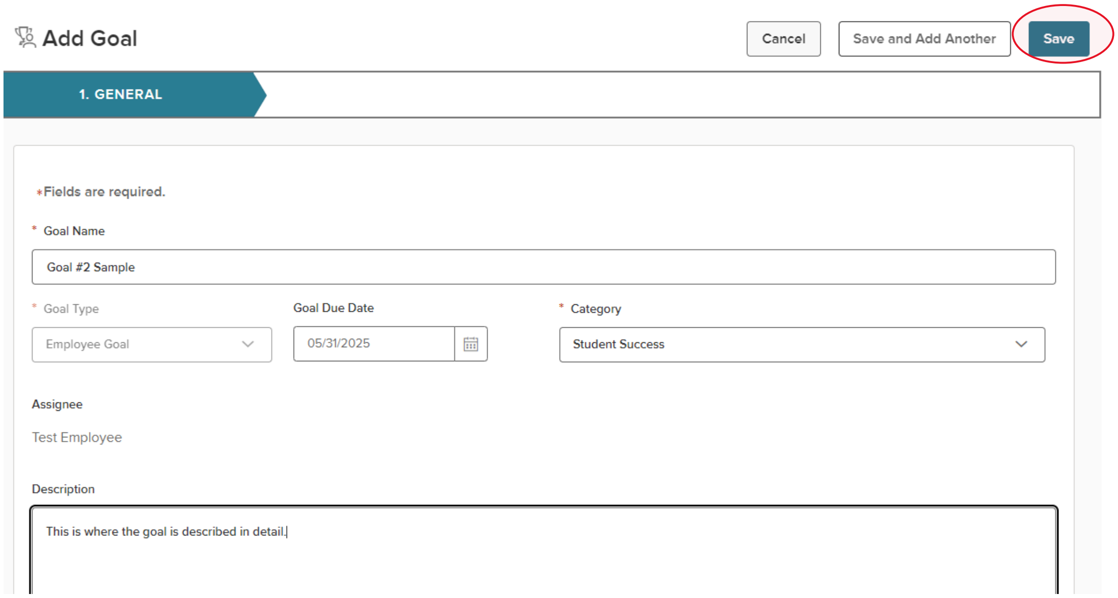
In the "Description Box," describe your goal in more detail. Be sure your goal is measurable and specific. You can also describe how it relates to the Strategic Plan category you selected. When you are done, click the button in the upper right that says, "**SAVE AND ADD ANOTHER**."



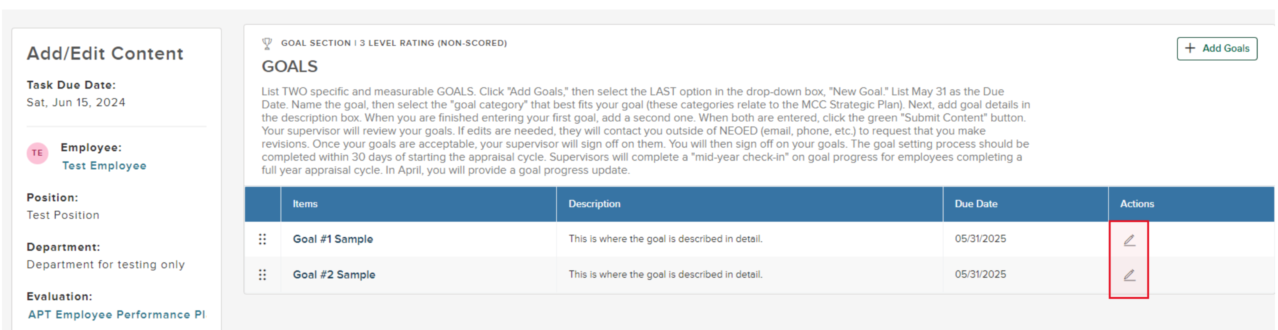
You will see a new "Add Goal" box. Add your second goal.

Adding Goals, continued:

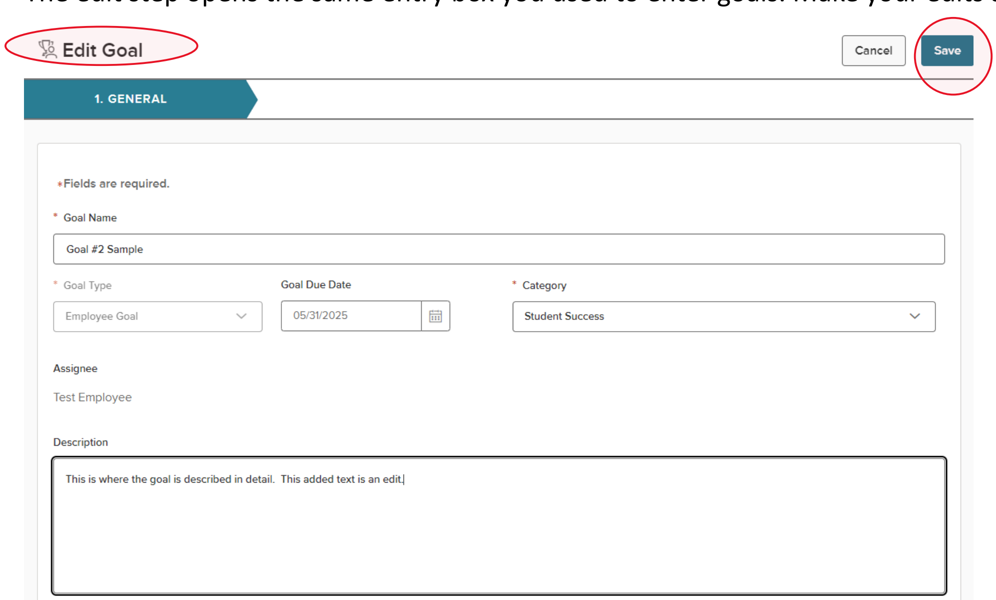
Once you have entered your second goal, click the **SAVE button** in the upper right corner.



After you have saved your second goal, you will be able to view both of your goals. If you wish to make further edits, click on the pencil icon next to the applicable goal.

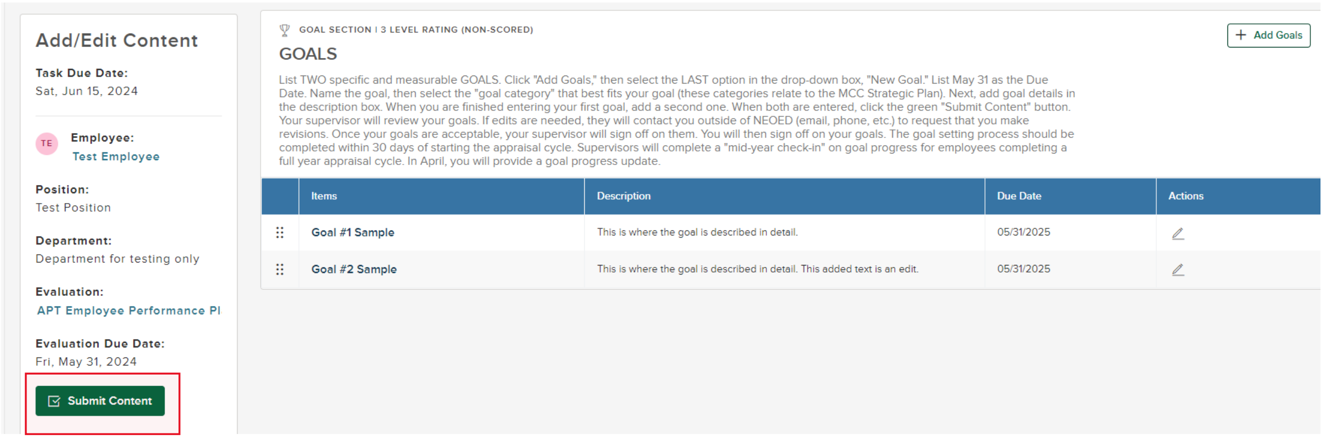


The edit step opens the same entry box you used to enter goals. Make your edits and click the SAVE button.

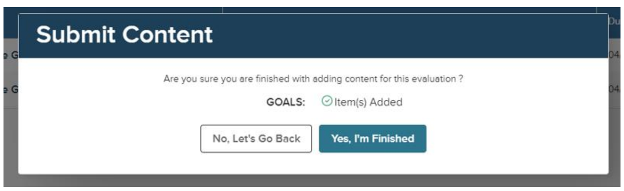


Adding Goals, continued:

After saving an edit to a goal, you will return to the Goals Section overview. When you are ready to submit your goals to your Supervisor for approval, click on the **SUBMIT CONTENT** button on the lower left.

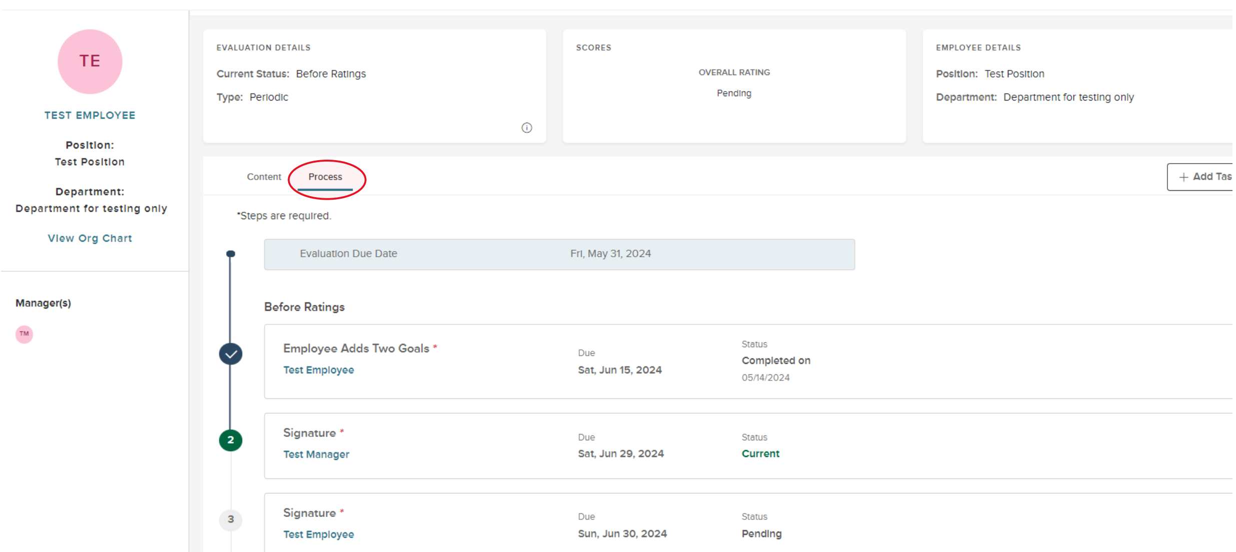


You will be asked to verify that you are ready to submit your goals. If you are not, click the "No, Let's Go Back" button to edit them further. If you are finished, click the **"Yes, I'm Finished"** button.



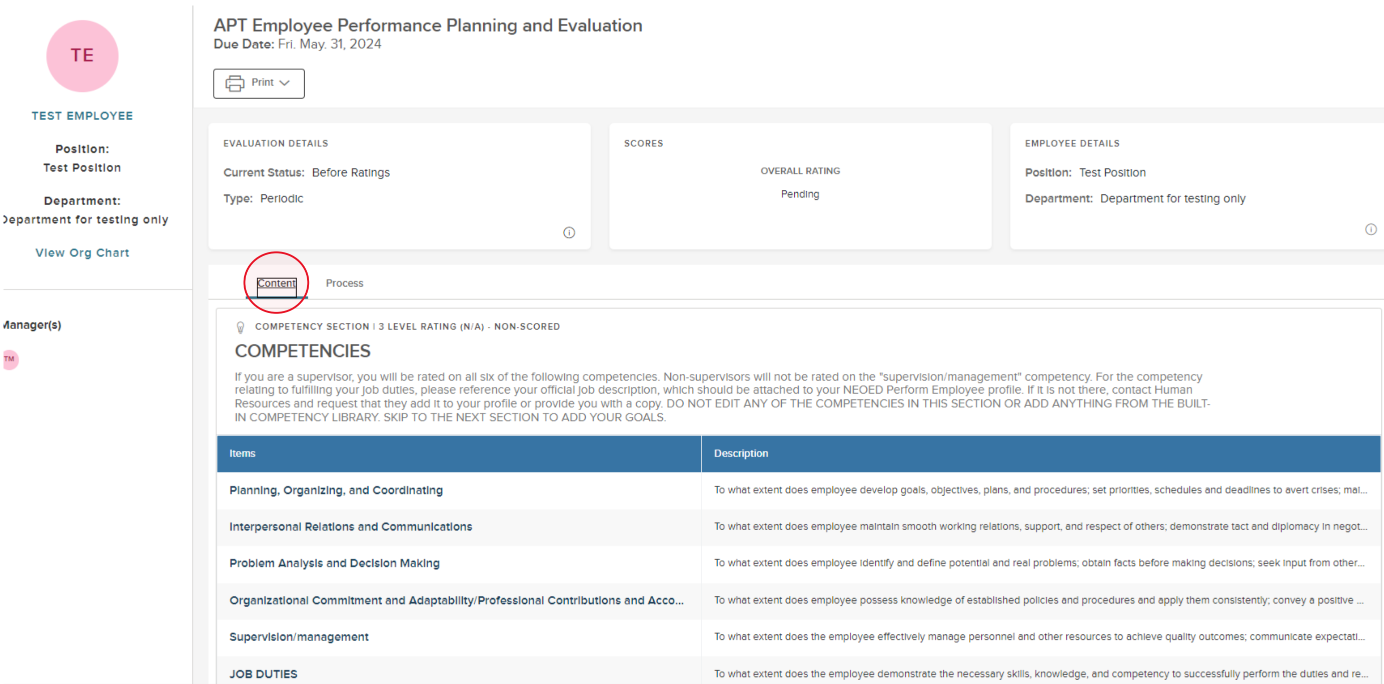
Evaluation Process and Content

When you are finished submitting your goals, you will see an overview page of the Performance Plan process. The **PROCESS TAB** will show you each step of the evaluation process, who is responsible for each step, when it is due, and the status of completion. The following is an example of the goal setting and goal approval steps. You can see that the Employee has completed adding two goals, and the current step is for the "Test Manager" (Supervisor) to sign off on the goals. After the Supervisor signs, then the Employee will sign, which concludes the end of the goal setting process.

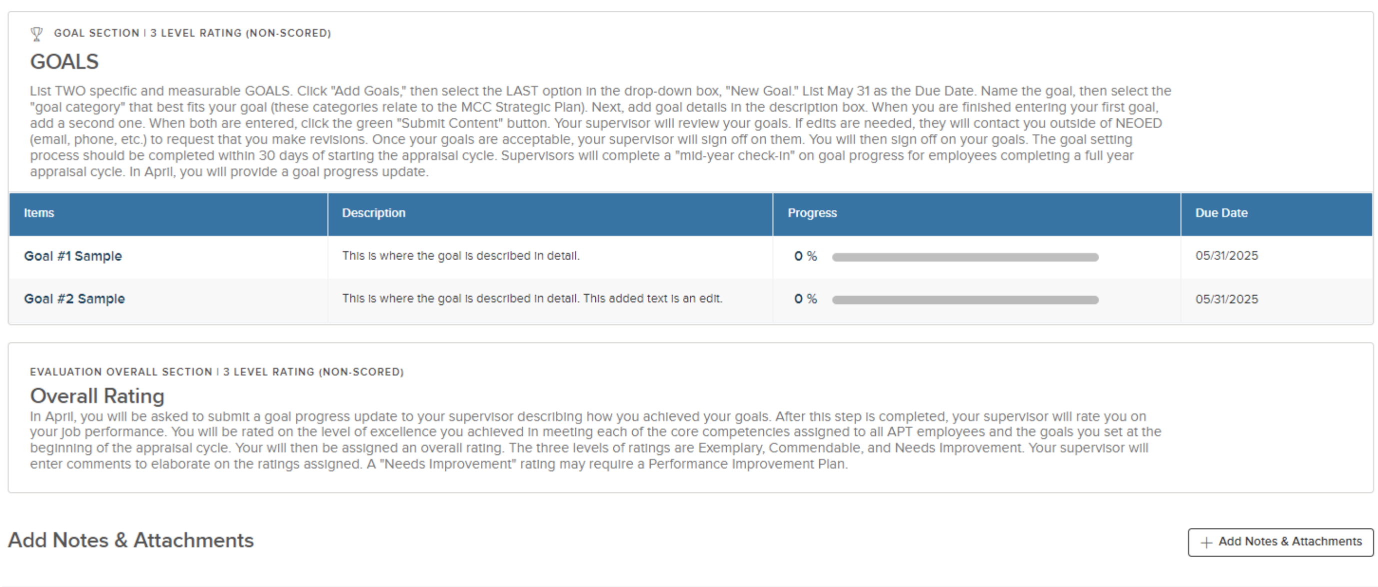


Evaluation Process and Content, continued:

The CONTENT TAB (to the left of the Process Tab) will list the competencies you will be rated on and the two goals you set. (Note that the Supervision/Management competency will not apply to all APT Employees.) DO NOT EDIT OR ADD TO THE COMPETENCY SECTION.

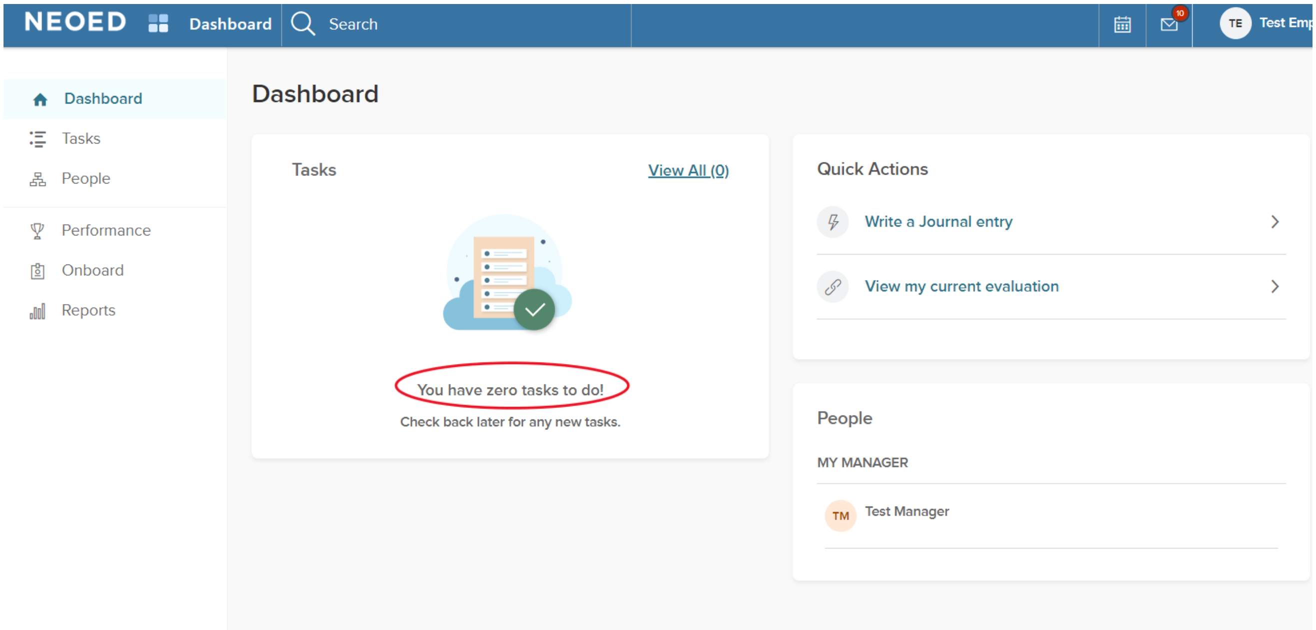


The Goal Section is located directly below the Competencies Section. You will also see that an Overall Rating section is viewable. This Overall Ratings section of the process will be completed by your Supervisor in May. There is also a place to add notes and attachments to your evaluation. However, if you wish to keep track of your achievements during the evaluation cycle, the **"Journal Entry"** feature is the preferred option (described later).



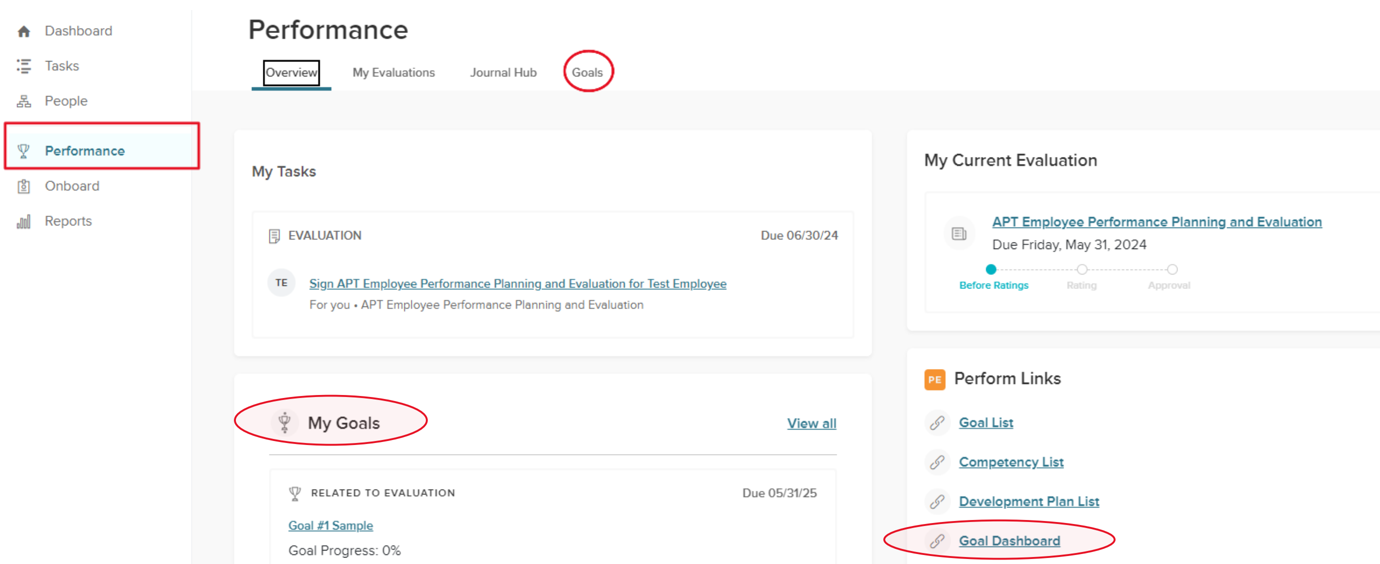
Goals Approval & Signatures

Now that you have submitted your goals, your main dashboard will show that you have zero tasks to complete. The next step is for your Supervisor to review your goals. If your Supervisor feels that edits are needed to your goals, they will contact you ***outside of NEOED Perform*** (i.e., by email, phone, or in-person). If contacted, you will **not** see a "Task Due" on your dashboard, but you will need to update your goal(s) per your Supervisor's request.



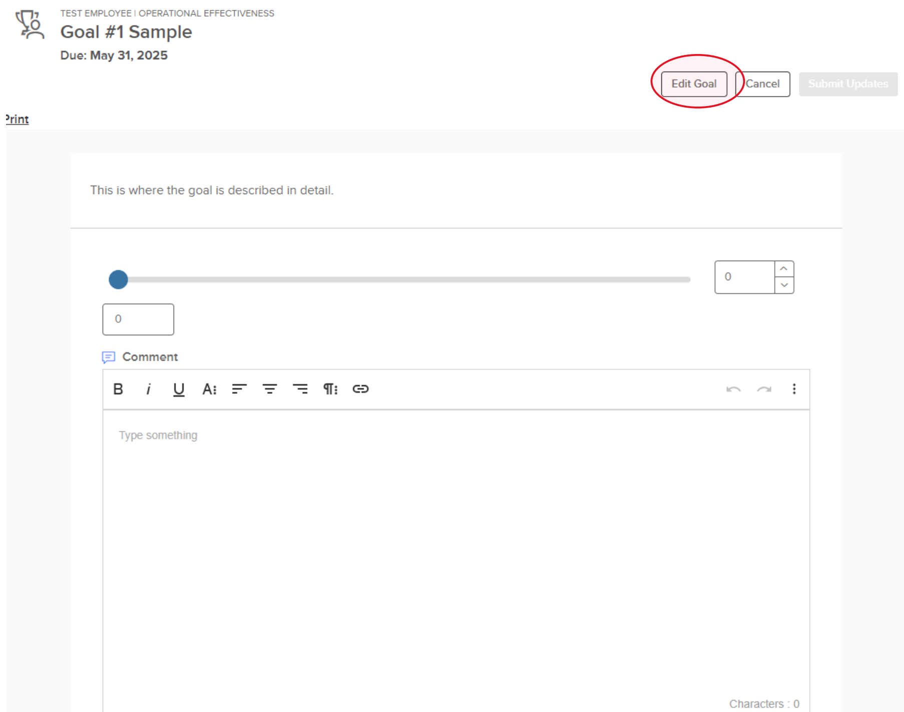
Editing Goals After Submitted

If your Supervisor requests that you edit your goals, there are several ways you can access them. From your dashboard, click on the Performance tab on the left side of the page. In the Performance section, you can click on the applicable goal listed under "My Goals." You can also access your goals by clicking on the "Goals" tab at the top of the page, or by clicking the "Goal Dashboard" link under the "Perform Links" section.

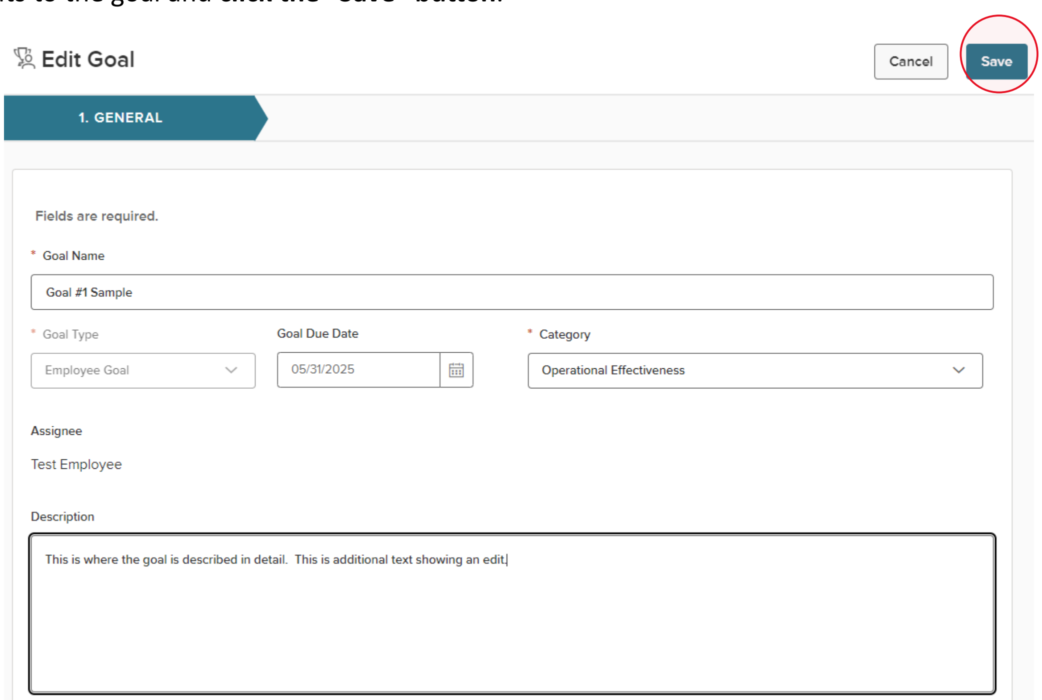


Editing Goals After Submitted, continued:

In this example, the "Goal #1 Sample" link under "My Goals," has been clicked. The goal can be edited by clicking on the "Edit Goal" button in the upper right corner.

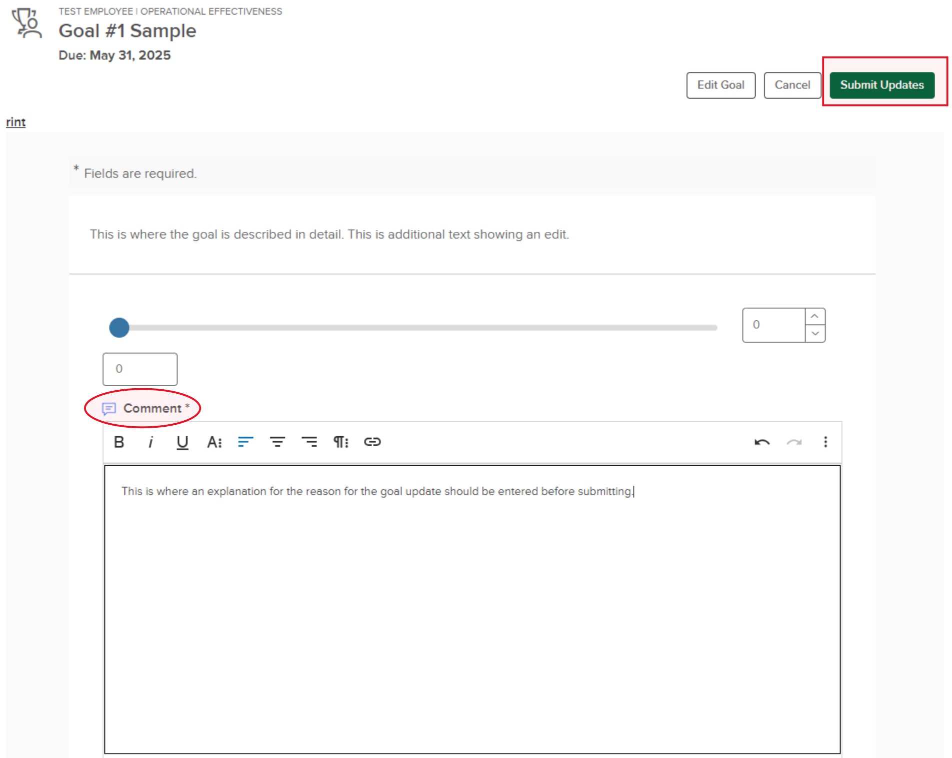


Make your edits to the goal and **click the "Save" button**.



Editing Goals After Submitted, continued:

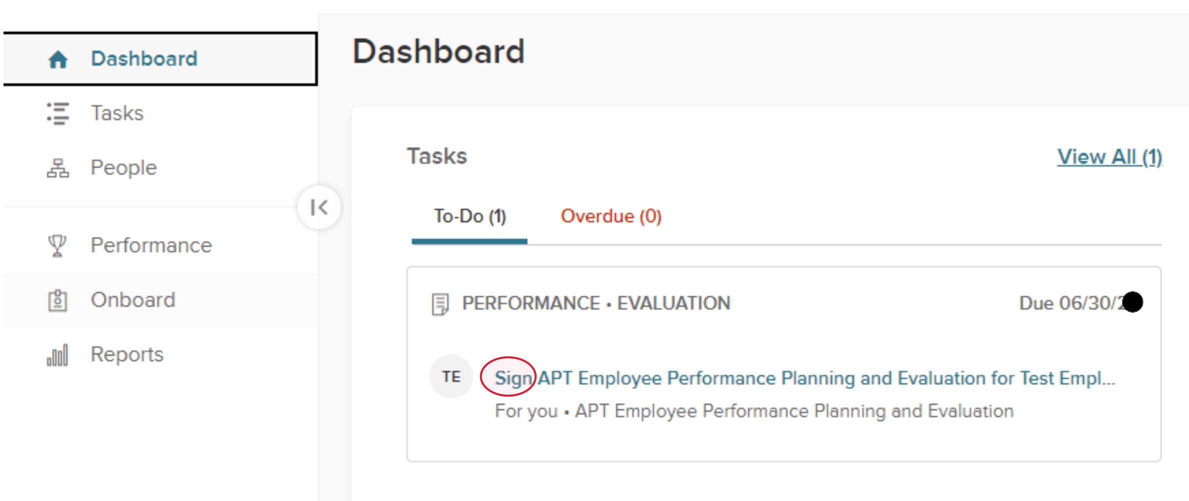
After you have made your requested edits and clicked on "Save," you will see a screen with your updated goal. **You MUST add a comment in the box explaining why the update was made.** Once you have included a comment explaining the reason for the update, click the **"Submit Updates" button** in the upper right corner.



Your Supervisor will receive an email from NEOED notifying them that you have updated your goals. You can also notify your Supervisor outside of NEOED to let them know. If your goals are now acceptable, your Supervisor will sign off on them. If your goals need further revision, your Supervisor will again contact you ***outside of NEOED*** to discuss additional changes. Follow the same process just described to continue editing your goals until your Supervisor approves them.

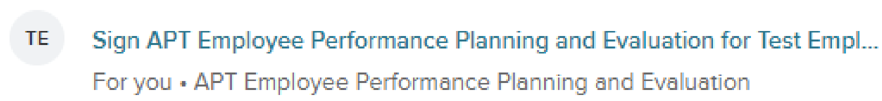
Signing Off on Your Goals

Once your Supervisor approves your goals, you will see that a task is due for you to sign off on your goals:

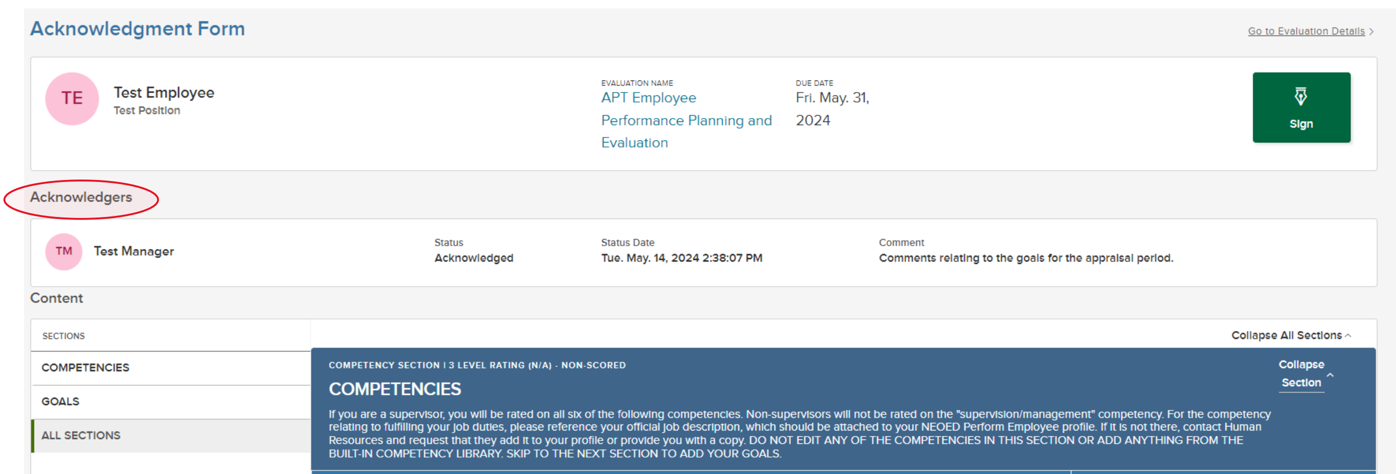


Signing Off on Your Goals, continued:

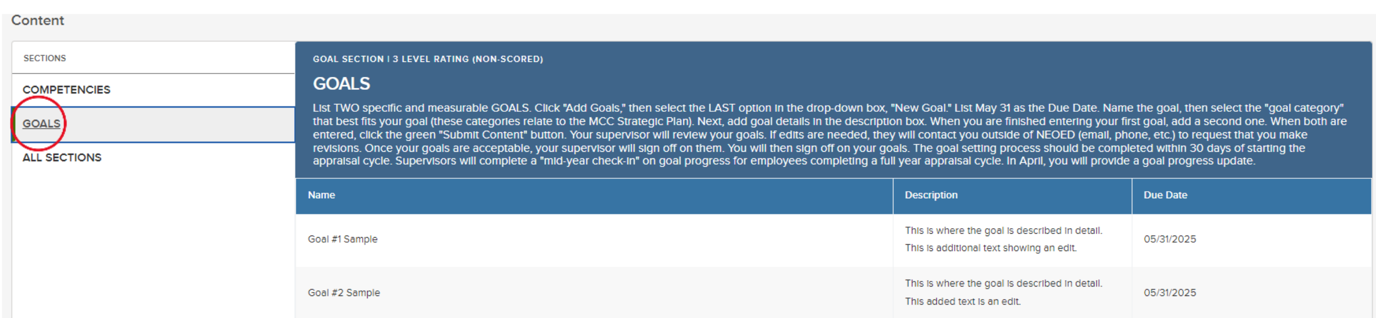
Note that all signature steps are worded similarly, asking you to sign something related to your current evaluation plan. ***It WILL NOT identify what the signature is for****.*



Click on the "Sign" task link. This will take you to an Acknowledgement Form page. The first component you will see is the list of "Acknowledgers." This is a record of who has signed off/approved elements of the performance plan. In this example, the Test Manager has signed off on the Employee's goals. The next section shows the *content* of the performance plan. The view defaults to "All Sections," so the competencies that all APT Employees will be evaluated on are shown first.



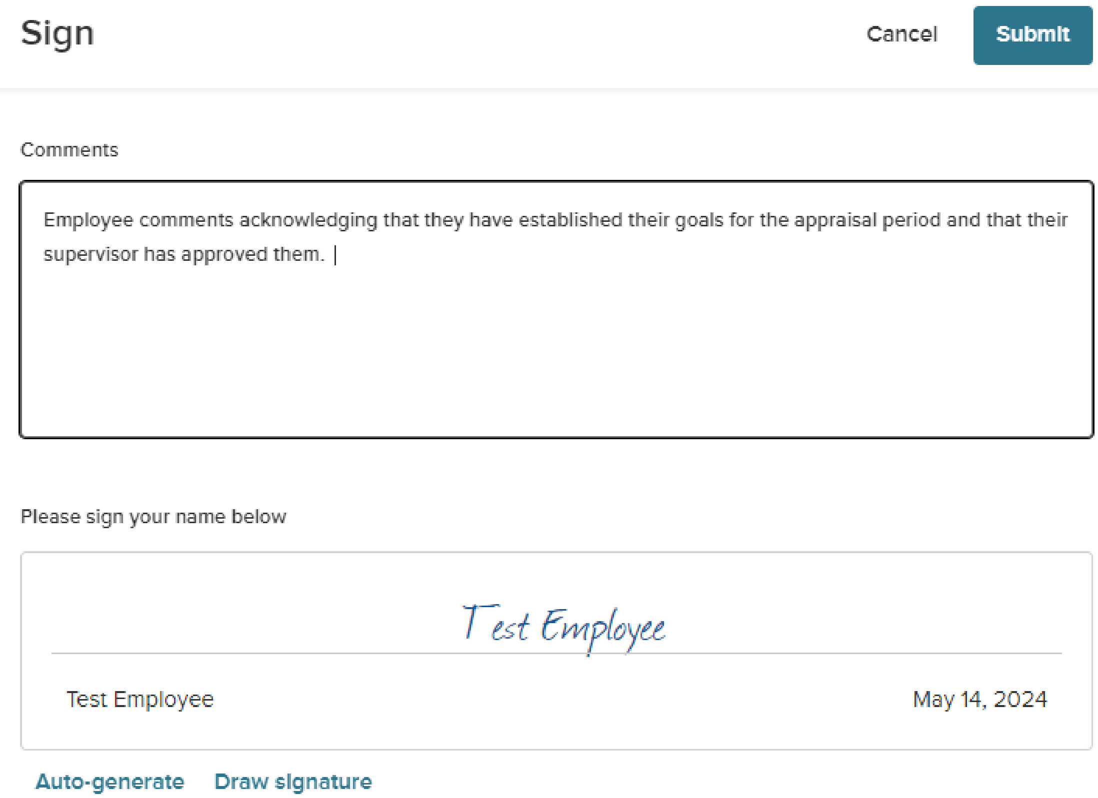
Click on the "Goals" section tab on the left to jump to the goals section or scroll down the page to review your goals a final time before signing.



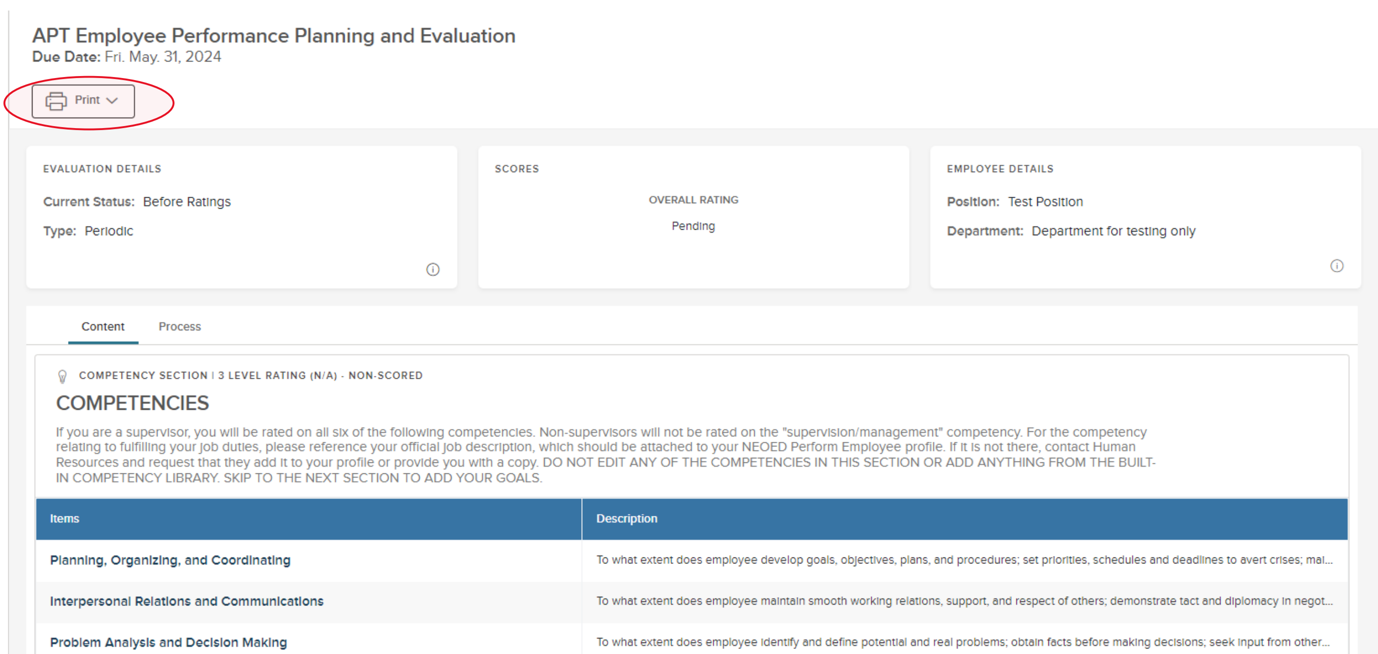
If you agree with your evaluation goals as approved by your Supervisor, click the **"Sign"** button in the upper right of the screen. If you feel additional changes are needed to your goals, talk with your Supervisor before making edits.

Signing Off on Your Goals, continued:

Once you click the **"Sign"** button, you will see a screen where you can enter a comment before clicking "Submit."

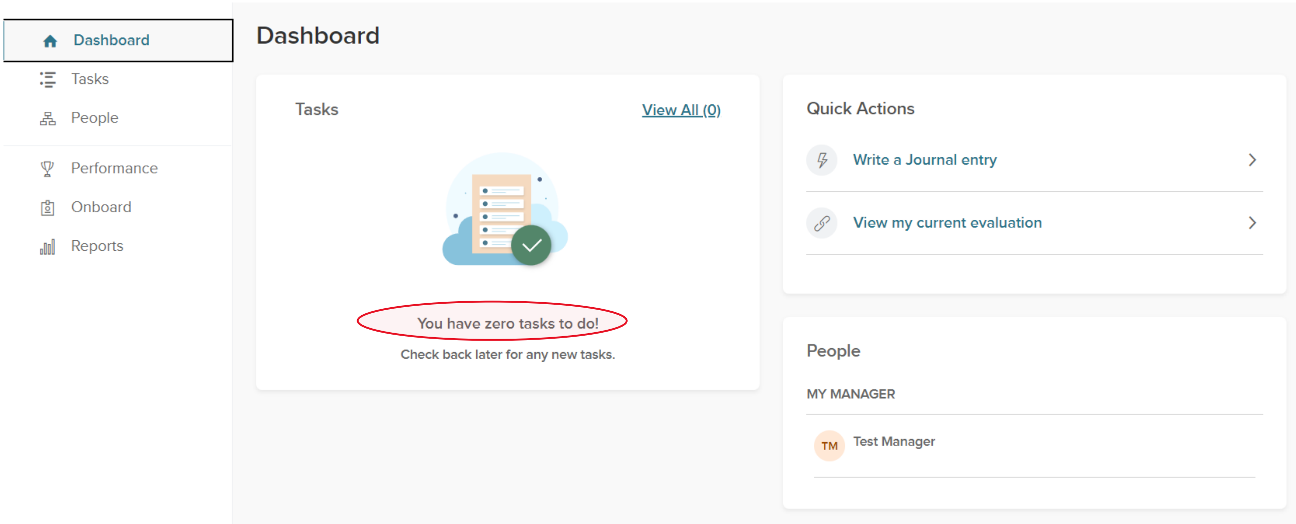


After you click "Submit," you will be returned to an overview of your performance plan, where you can print a copy, if desired. Note: You may need to allow pop-ups in order to print (see instructions on page 26).



Signing Off on Your Goals, continued:

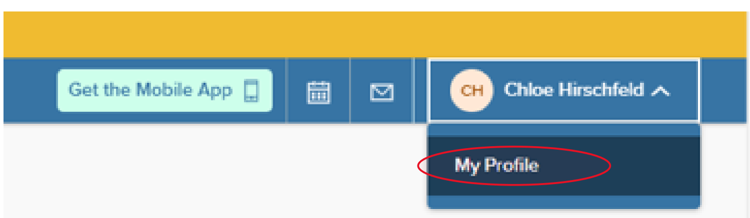
You will now see that zero tasks are due on your dashboard, meaning that you have completed the goal setting and approval process!



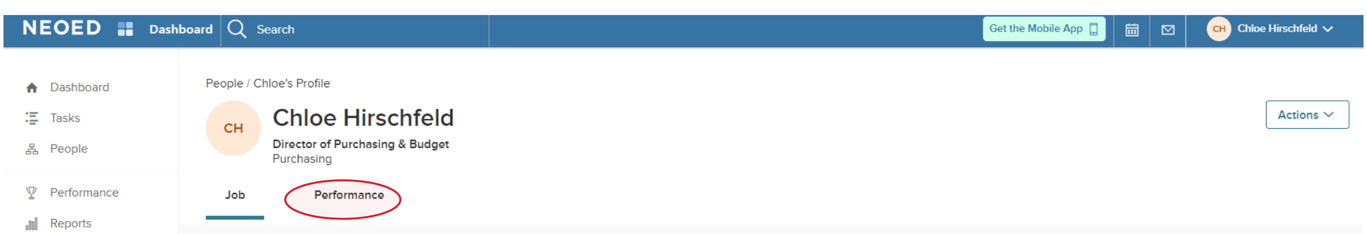
The next phase of the Performance Plan is for you to work on accomplishing your goals and fulfilling the expectations of the core competencies. **Remember, one of the competencies relates to performing your job duties as listed in your job description.** The next section explains how to access your job description so that you are aware of the expectations.

Accessing Your Job Description

If you do not already have a copy of your latest job description, there should be one attached to your NEOED profile. To access your profile from your main dashboard, click the down arrow by your name in the upper right corner. A "My Profile" drop-down box will appear.

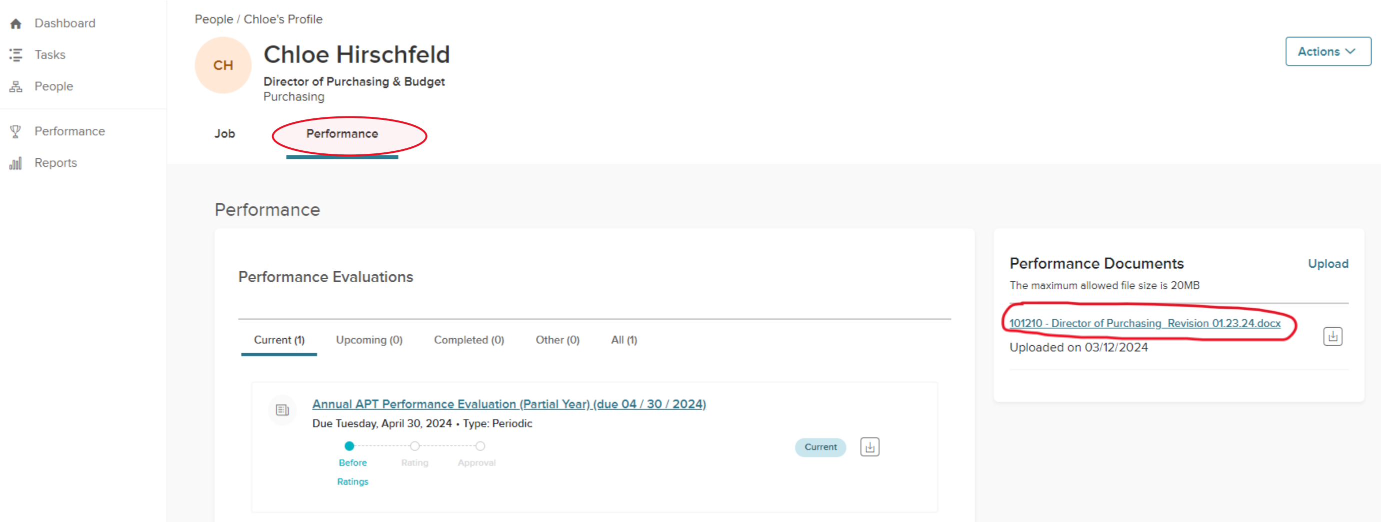


Click on "My Profile." The Profile page will default to the "Job" tab. Click on the "Performance" tab just to the right of the Job Tab.



Accessing Your Job Description, continued:

In the Performance Tab section, you will see a segment titled "Performance Documents." This is where you should find a link to your job description. You can click on the link and download it for viewing, printing, and/or saving.

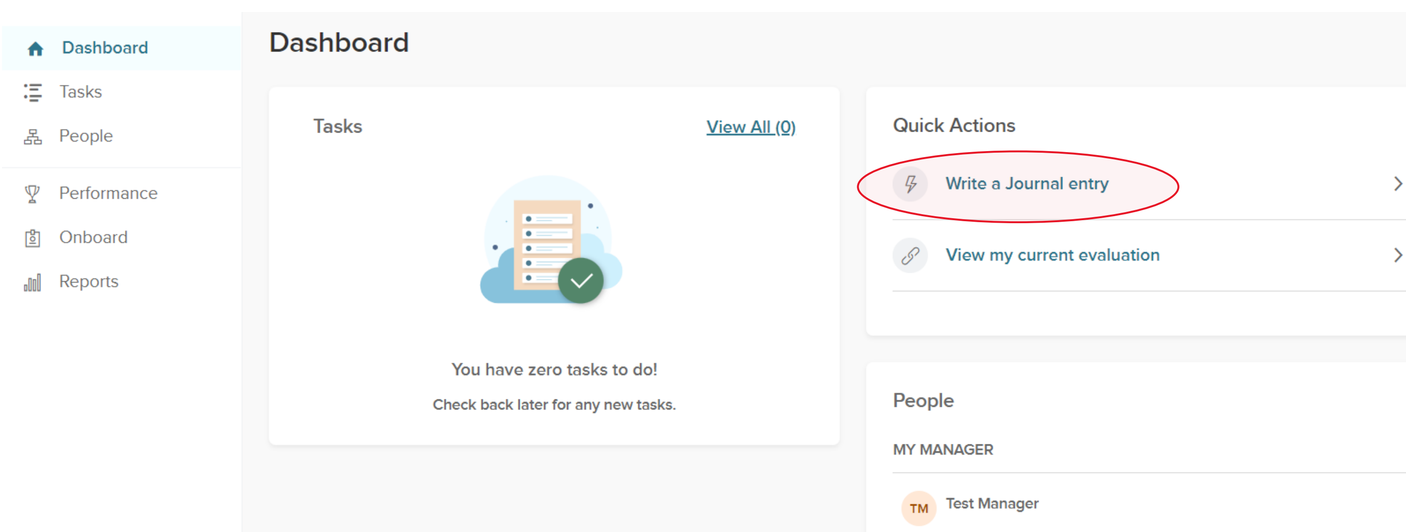


If you do not see your job description attached to your profile, contact the Human Resources Department to obtain an electronic or hard copy. Request that your job description be added to your NEOED Perform profile. If you notice that your job description needs updating, please collaborate with your Supervisor and the HR Department to create an updated version.

Journal Entries

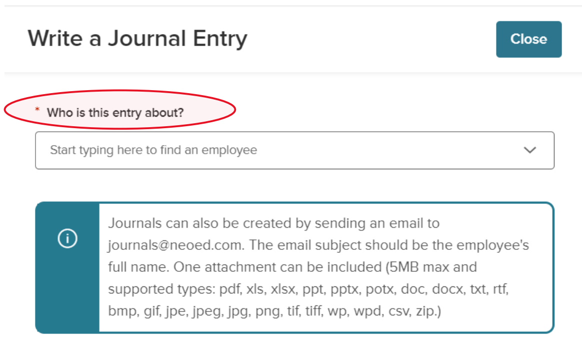
As you progress toward accomplishing the goals you submitted, you are encouraged to keep a record of your achievements by utilizing the **"Journal Entry**" feature.

Go to the "Quick Actions" section of your dashboard and click on "Write a Journal entry."



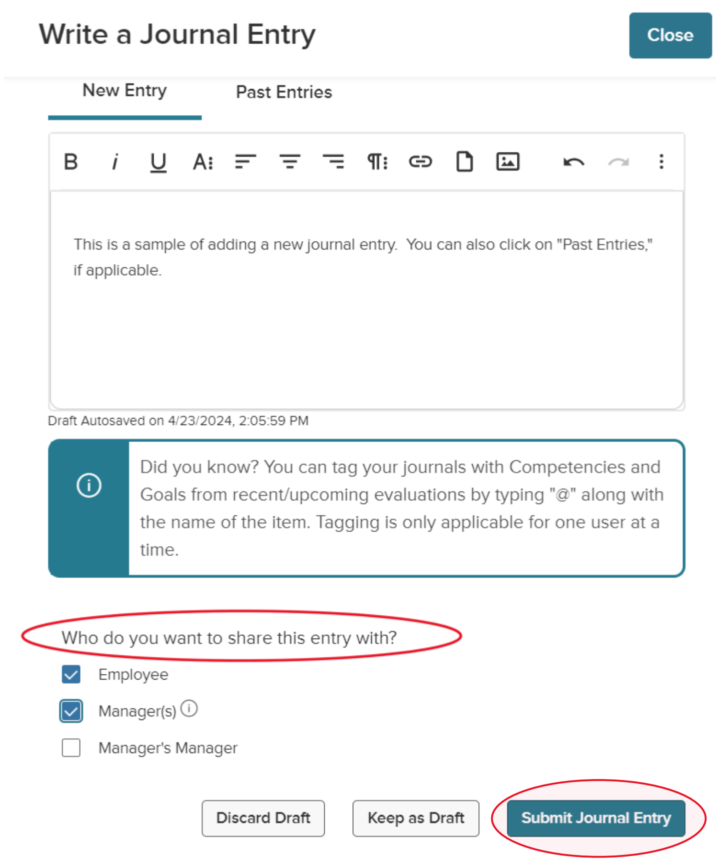
Journal Entries, continued:

After clicking on "Write a Journal Entry," you will see the following. Under "Who is this entry about?" select yourself. (In this example, it will be "Test Employee.")



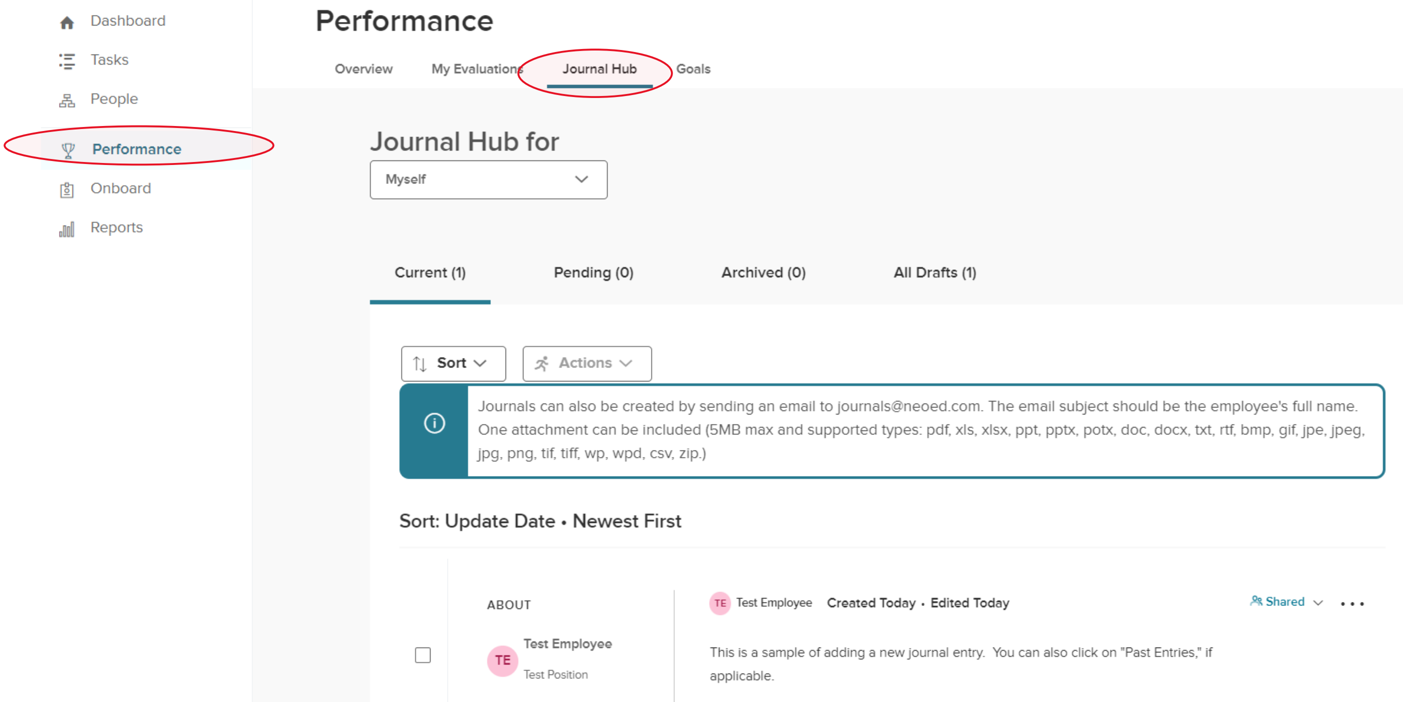
A text box will appear where you can write your journal entry. If you wish to "tag" the entry to correspond with a particular goal or competency, type "@" and the name of the goal or competency in the textbox, as well.

After you write your journal entry, **select whom you want to be able to view it: Employee (yourself), your Manager, or your Manager's Manager.** You can select one, two or all three options. In the sample below, "Employee" and "Manager(s)" are selected. When you are finished, click the **"Submit Journal Entry"** button.

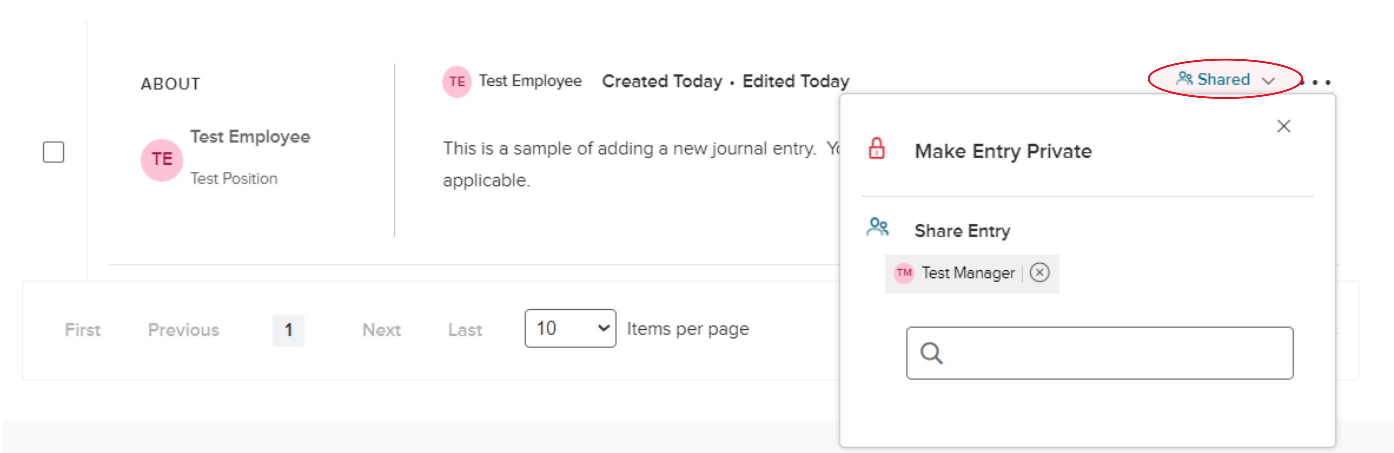


Journal Entries, continued:

To view journal entries, go to your main dashboard. Click on the "Performance" tab on the left, then select "Journal Hub" to review your entries.

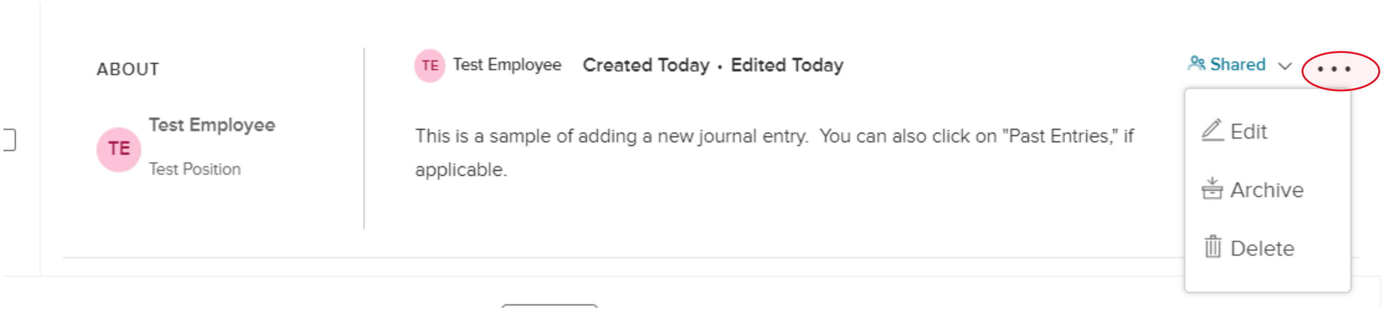


To the right of the journal entry, you can see whether you have shared it. If it says "Shared," you can click on the down arrow to see whom you have granted viewing permission. In this example, the entry has been shared with the Employee's Manager. You can delete the sharing privilege, add others, or make the entry private.



Journal Entries, continued:

If you click on the three dots next to the journal entry, you can edit, archive, or delete it.

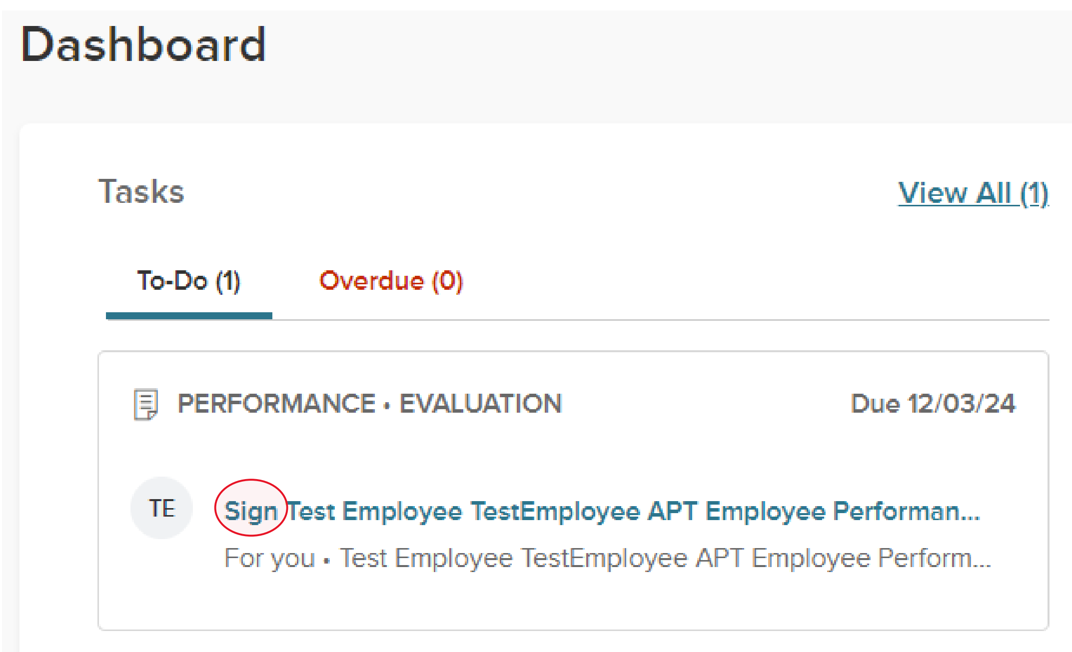


Mid-year Progress Review/Check-in (by Supervisor)

If you started your performance plan early in the annual cycle, the next step will be for your Supervisor to conduct a **Mid-year Progress Review Check-in** in late November/early December. The purpose of this "Check-in" is to assess and document your progress toward meeting your goals and fulfilling the other expectations of your Performance Plan. Your Supervisor may also describe revisions needed to your plan (e.g., goals) to reflect any relevant changes in your workload or other circumstances.

NOTE: *If you are a new Employee who began employment later in the evaluation cycle, a Mid-Year Progress Review may not be included in your Performance Plan. However, your Performance Plan will still have the same due date as other APT Employees: May 31.* **All Employees are encouraged to connect with their Supervisors at any time in the evaluation cycle outside of NEOED to discuss their performance progress.**

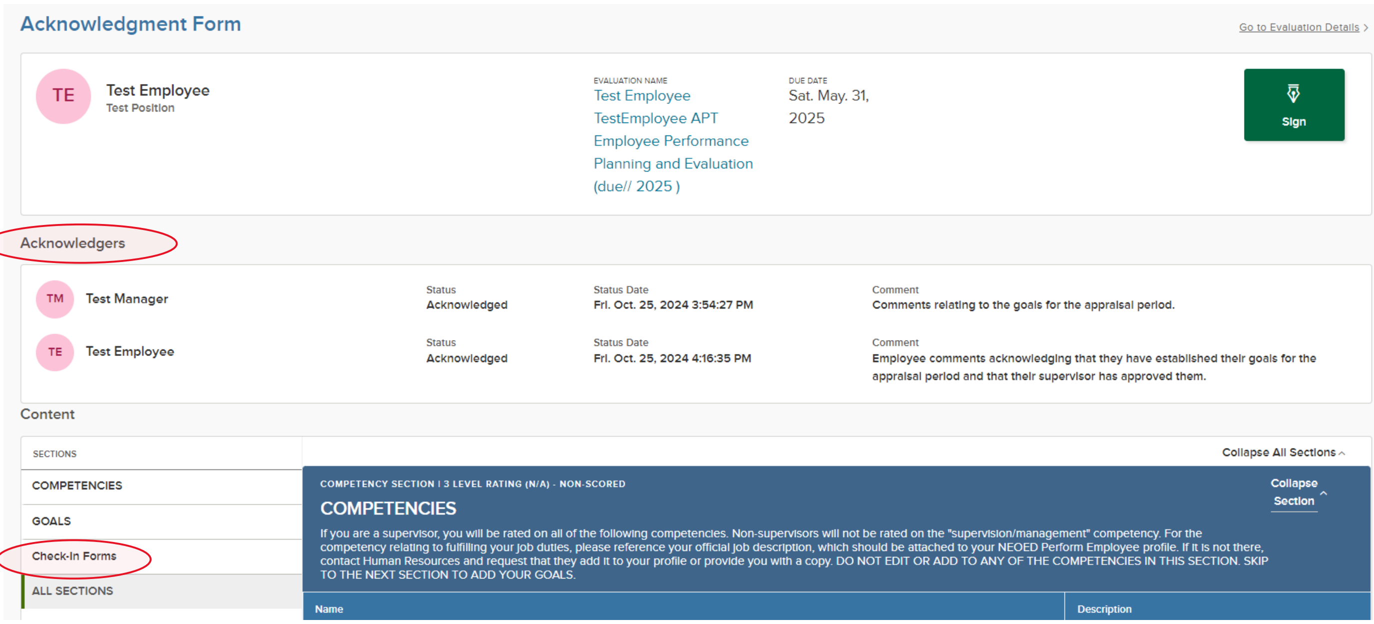
Once your Supervisor has completed your Mid-Year Progress Review Check-in in NEOED (if applicable), you will receive notification to complete a signature acknowledging receipt of the Review.



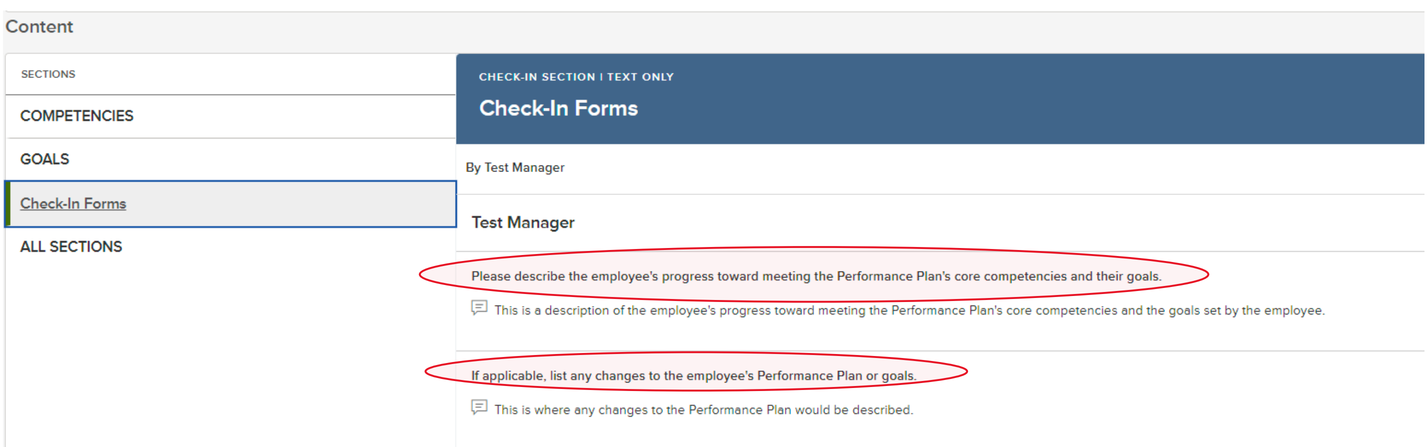
Mid-Year Progress Review, continued:

After clicking on the “sign” task link, an Acknowledgement Form will appear. As you scroll down, you will see a record of previous signatures (“Acknowledgers”) where you and your Supervisor signed off on your goals. You will also see the Competencies and Goals sections of your Performance Plan.

To review the Mid-year Progress Review/Check-in, click on “Check-in Forms” on the left, or scroll down to the very bottom of the page to the “Check-In Forms” section.



Review your Supervisor’s answers to the two mid-year check-in questions: “Please list the Employee’s progress toward meeting the Performance Plan’s core competencies and their goals,” and “If applicable, list any changes to the Employee’s Performance Plan or goals.” Then scroll back to the top of the page and click the **“Sign”** button in the upper right. *Note: Signing does not indicate your agreement or disagreement with the Mid-year Progress Review Check-in; it simply acknowledges that you have read it.*



Mid-Year Progress Review, continued:

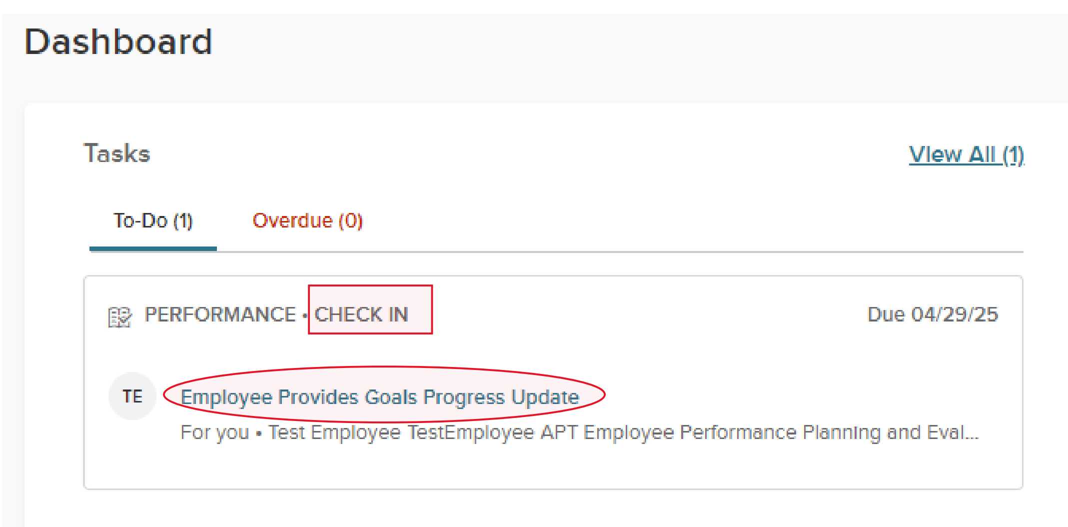
After you have clicked "Sign," a comment box and signature line will appear. Add comments, if desired. When done, click the **"Submit"** button.

Your Supervisor should schedule a time to meet with you to discuss your Mid-year Progress Review Check-in. If your Supervisor states that revisions are needed to your goals mid-cycle, clarify whether you are to make the edits in NEOED, or whether your Supervisor will do so. If they ask you to make the changes, follow the process described in this User Guide under "Editing Goals After Submission."

After the Mid-Year Check-in is completed, continue to work towards meeting your goals and the competencies listed in your Performance Plan. Continue to make Journal Entries, if desired.

End-of-Evaluation-Cycle Goals Progress Update Check-in (By Employee)

In April, you will receive notification to complete a **Goals Progress Update Check-in** for your Supervisor.

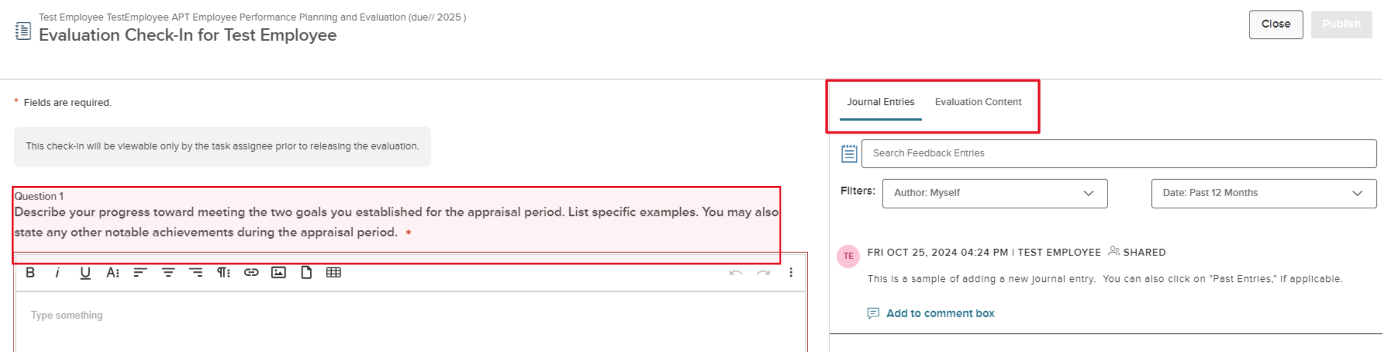


End-of-Evaluation-Cycle Goals Progress Update, continued:

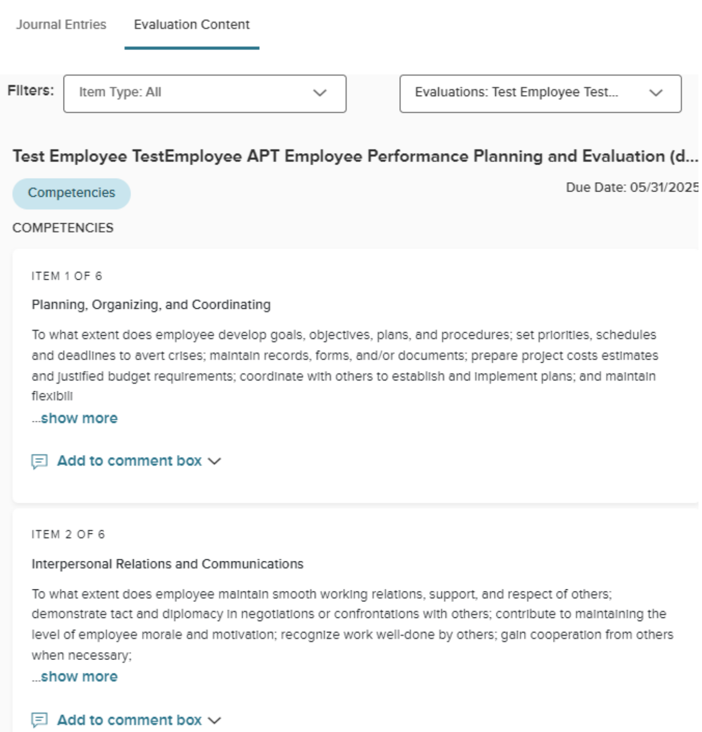
Goals Progress Update Check-in Form:

After clicking on the "Employee Provides Goals Progress Update" task, the Check-in form will open. You must answer the question, *"Describe your progress toward meeting the two goals you established for the evaluation period. List specific examples. You may also state any other notable achievements during the appraisal period."* **NOTE: Describe your progress on *both* goals in the same box.** There are not separate boxes for each goal.

To help answer this Check-in question, you can access two resources on the right side of the Check-in page: Journal Entries and Evaluation Content. The Journal Entry tab will list any journal entries you wrote, as well as any entries that your Supervisor shared with you if you use the filter "Author: All."

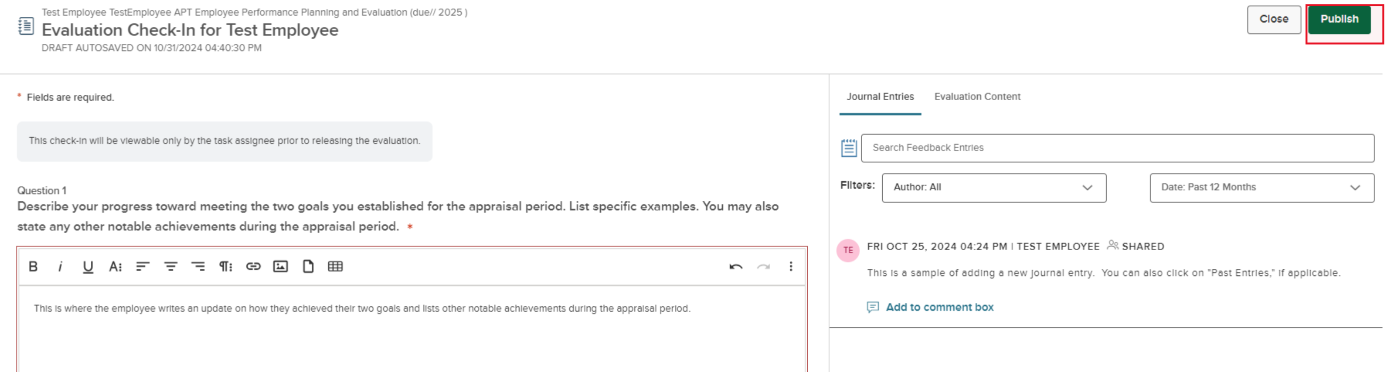


The Evaluation Content tab will list an overview of the core competencies you will be evaluated on, as well as the goals you set for the evaluation period (scroll down to see the goals section). You can click "Add to comment box" to add any of the Journal Entries or Evaluation Content to your Check-in answer.



End-of-Cycle Goals Progress Update, continued:

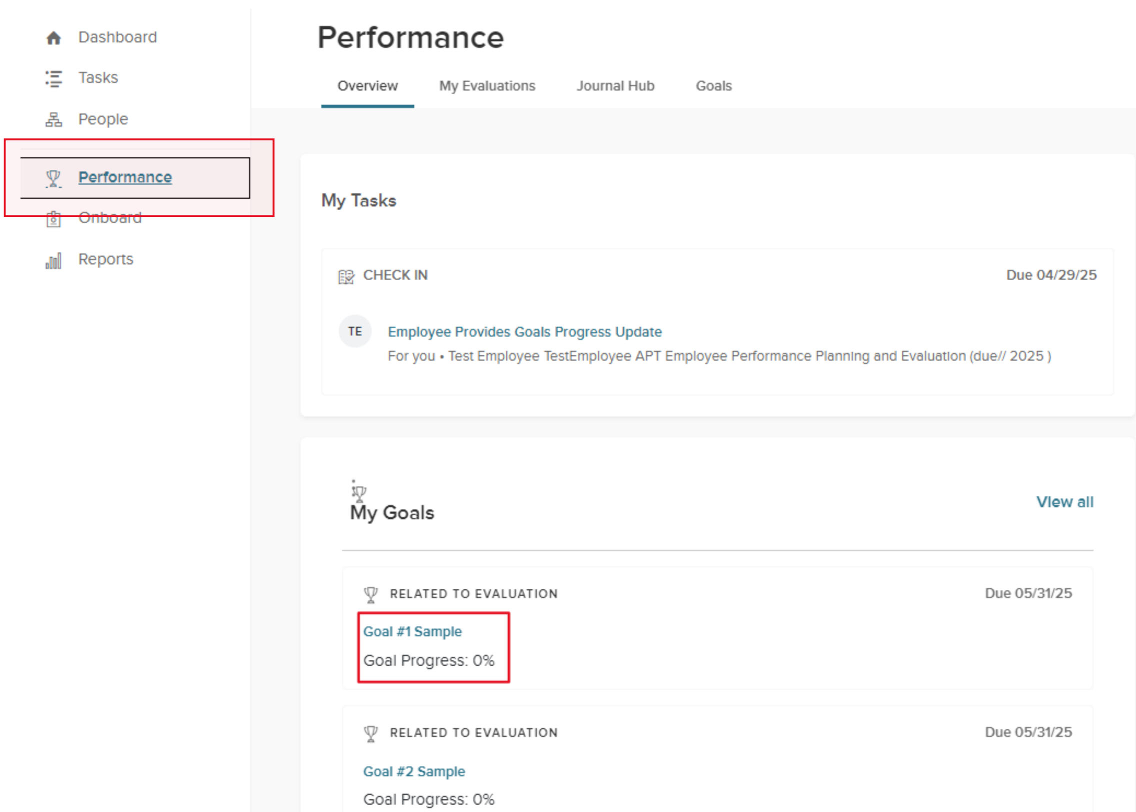
Once you type your answer in the text box, you will see the "**Publish" button turn green**. When you are ready to submit your Goals Progress Update, click "**Publish**."



Note: Once you have finished the Goals Progress Update Check-in Step, your Supervisor will be notified to complete your evaluation ratings. ***Your Supervisor cannot start on your ratings until you have submitted your Check-in Step***.

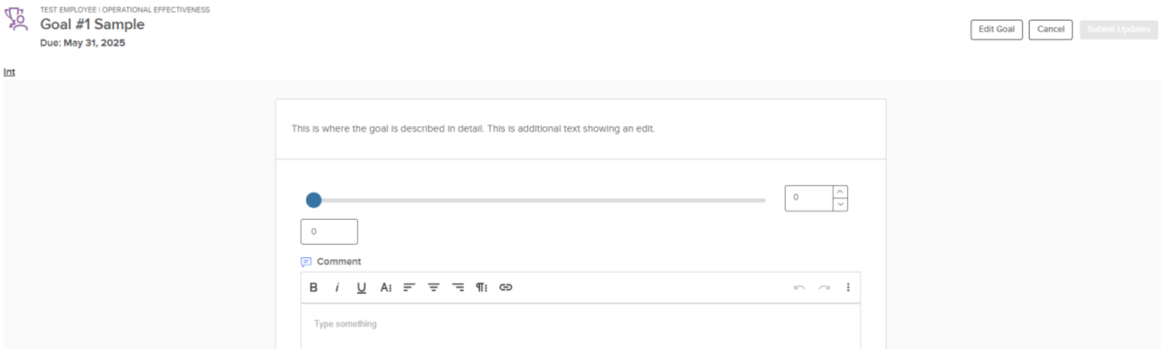
Optional Additional Goal Updates (prior to Check-in step)

Between the time after your goals are approved at the beginning of the Performance Plan cycle and when you complete your Goals Progress Update Check-in Step, you are welcome to provide additional **OPTIONAL** goal progress updates. To do so, go to your main dashboard and click on the Performance Tab. Under "My Goals," click on the goal for which you wish to provide an update.

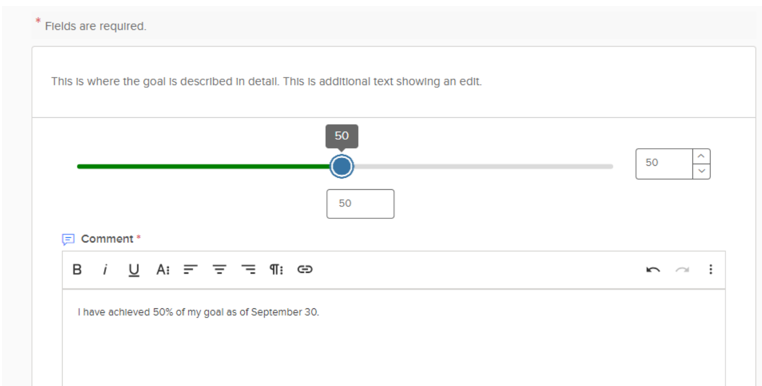


Optional Additional Goal Updates, continued:

In this example, Goal #1 was clicked. Do NOT click the "Edit Goal" button. Simply begin typing in the comment box.



You can also slide the progress button to indicate what percentage of the goal has been completed.

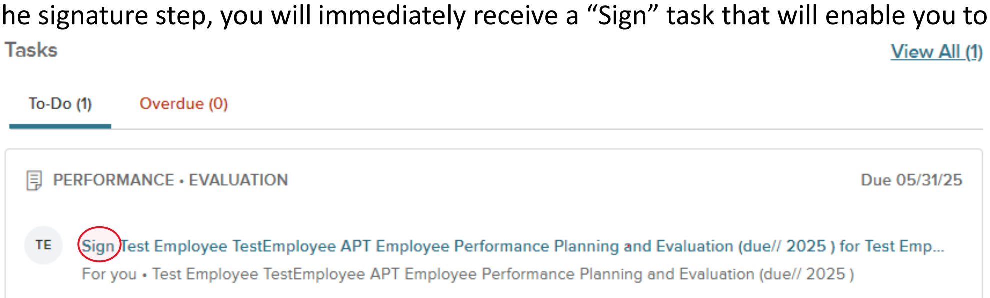


IMPORTANT: If you choose to provide optional goal updates through this method, you must still complete the required "Employee Provides Goals Progress Update Check-in Task." As a best practice, it is recommended that you move your progress bar on your goals to indicate their level of completion BEFORE completing the required Goals Progress Update Check-in Task. Otherwise, they will show as "0%" completion in your final ratings form. However, this is not required, and it will not impact your ratings. Your Supervisor will be informed about your goal progress achievements via your required Goal Progress Update Check-in Task.

End-of-Evaluation-Cycle Ratings

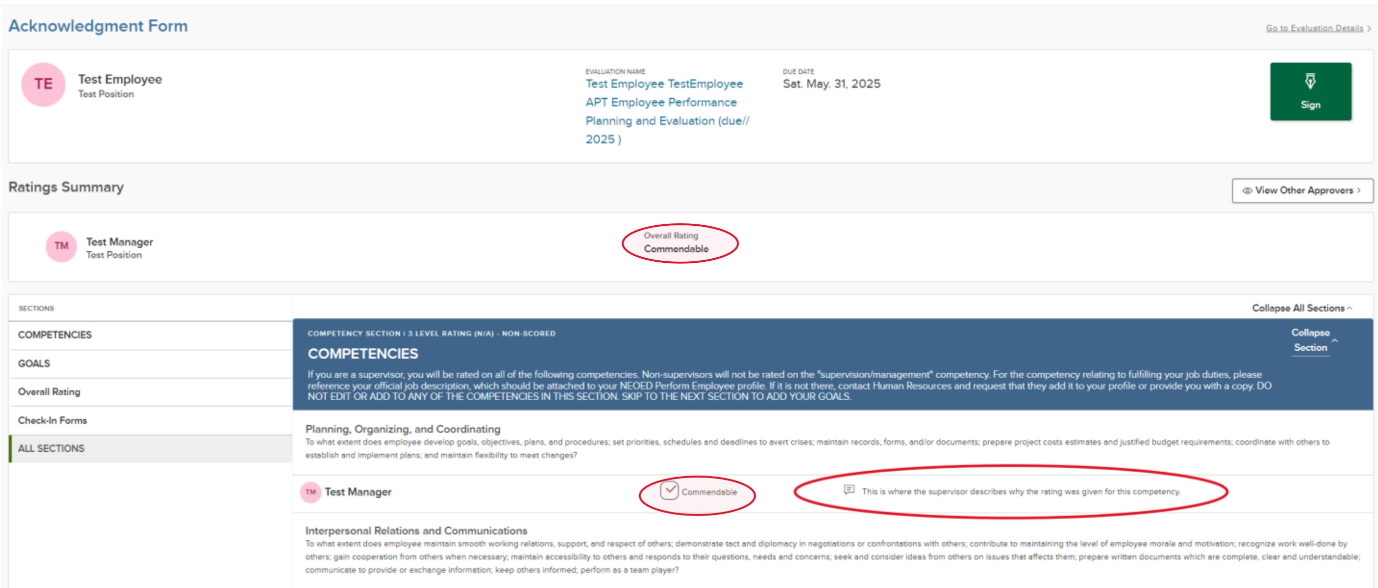
Final Signature Steps

After your Supervisor completes your evaluation ratings, it will go to their Supervisor (your Second-level Supervisor) for review. Once your Second-level Supervisor signs approving your evaluation, your Supervisor will have one final signature step to acknowledge that the evaluation is ready to be released to you. Once your Supervisor completes the signature step, you will immediately receive a "Sign" task that will enable you to view your evaluation.

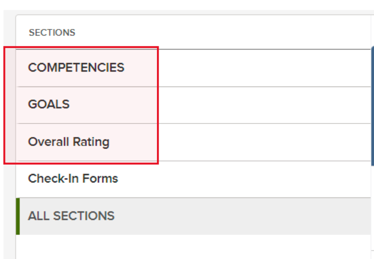


End-of-Evaluation-Cycle Ratings/Final Signature Steps, continued:

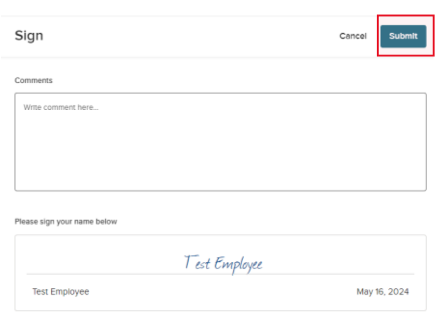
After clicking on your "Sign" task, you will be able to see your Overall Rating and can scroll down to view individual ratings for each Core Competency and Goal. Each Competency and Goal has been assigned a rating of "Exemplary," "Commendable" or "Needs Improvement." Supporting comments written by your Supervisor are provided for each rating.



You can also quickly jump to the section you wish to review by clicking on the appropriate selection on the left side of the page (Competencies, Goals, or Overall Rating). Your Supervisor should schedule a meeting to review your evaluation in person.

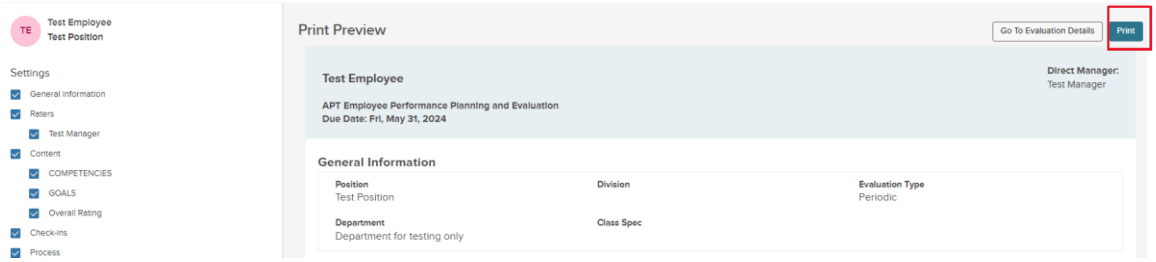


IMPORTANT: Please sign the evaluation by clicking the **"Sign" button** at the upper right corner of the page to complete the process. ***Signing simply acknowledges that you have received and read the evaluation and does not indicate whether you agree or disagree with the ratings or comments.*** After you click the sign button, a comment box will appear. If you disagree with your evaluation, you can explain why in the comments box. **Click "Submit**."

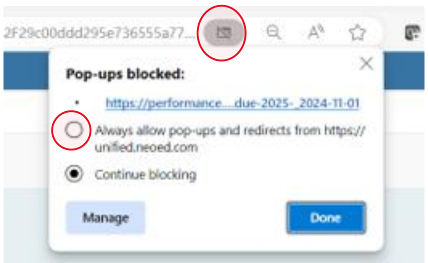


Printing Your Evaluation

After you sign and acknowledge receipt of the evaluation, you will see an overview of your evaluation that you can print (and save), if desired. You can click on the boxes on the left to view specific sections of the evaluation.

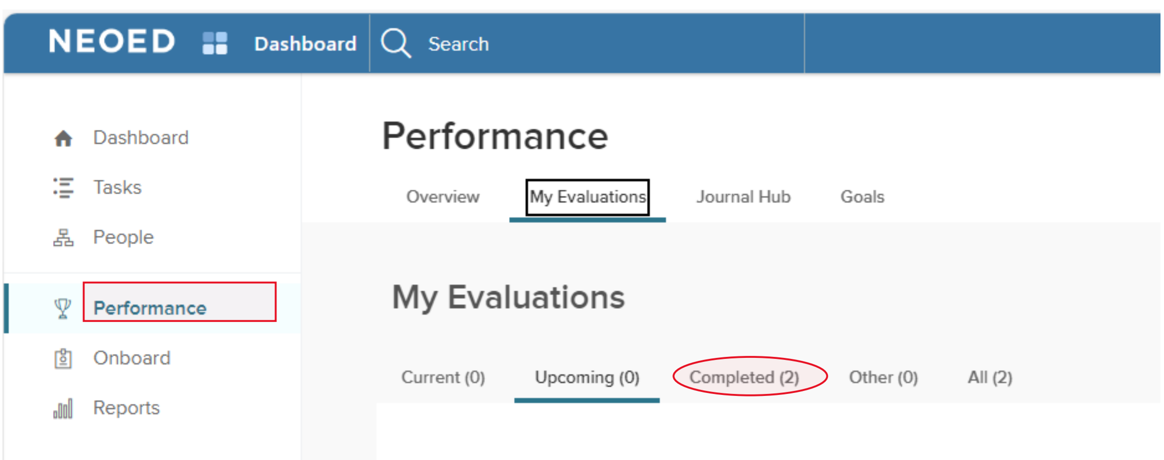


If you have trouble printing, it may mean that the pop up was blocked. Click on the icon in the page's address bar and click "Always Allow pop-ups . . ."



Reviewing Current or Completed Evaluations

If you wish to review active or completed evaluations, go to your dashboard, and click the Performance Tab on the left. Then click on "My Evaluations." To view a past evaluation, click on "Completed." Click on the link to the evaluation you wish to review.



Congratulations, you have completed the NEOED Perform online evaluation process!