



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**.

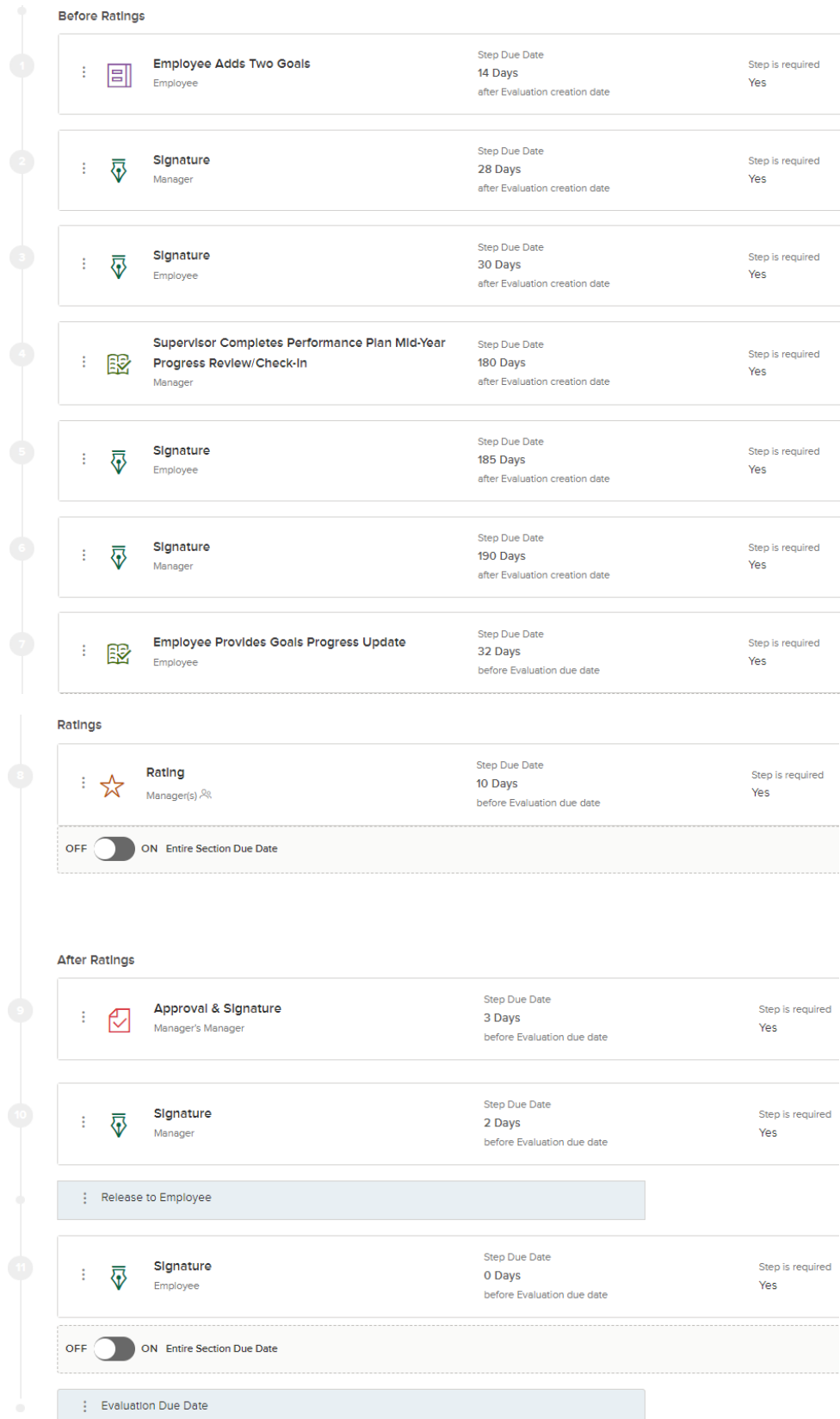
1. All APT Employees will be rated on several core competencies. (The Supervision/management competency will not apply to everyone.) Please note that the core competencies may be modified from year-to-year.

⋮	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 NEOED 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.

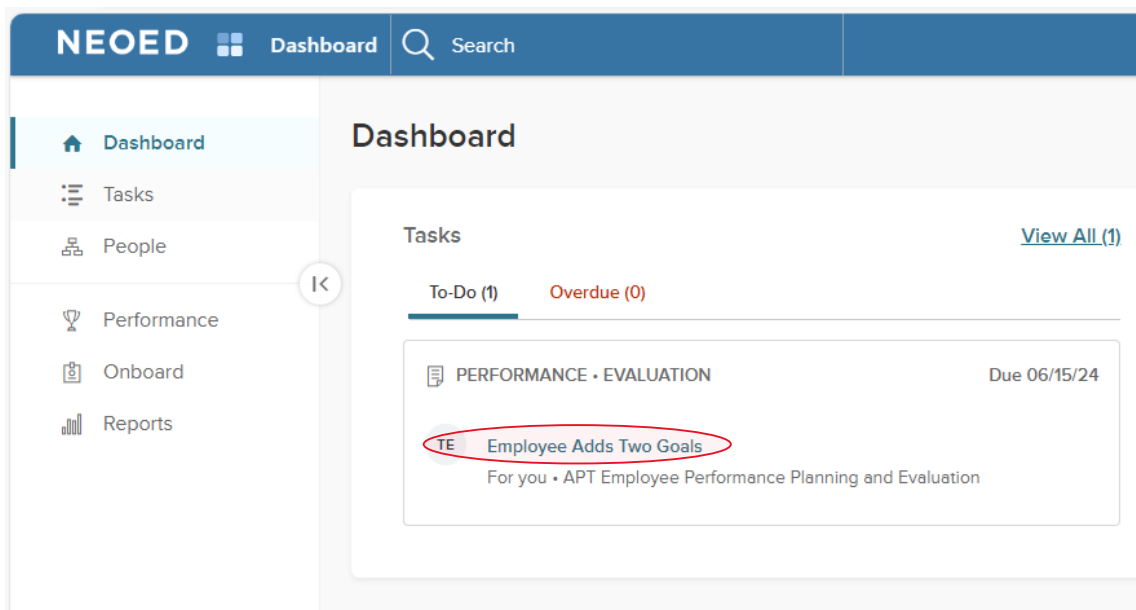


Account Activation/Access

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.

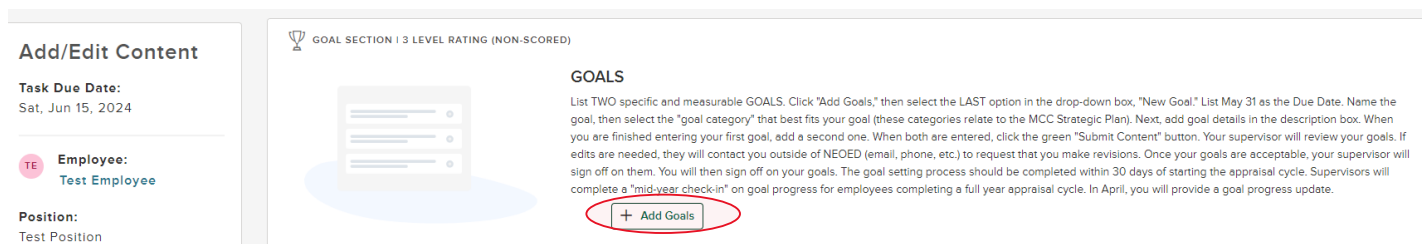
The NEOED Perform Dashboard

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."

GOALS

List TWO specific and measurable GOALS. Click "Add goal, then select the "goal category" that best fits you. you are finished entering your first goal, add a second edits are needed, they will contact you outside of NEC sign off on them. You will then sign off on your goals. com on goal progress for e

Add Goals

+ Add Goals

- Select From Employee Goals
- From Goal Library
- From Position
- Class Spec
- From Development Plan
- From Last Scheduled Evaluation
- From Employee Goals
- New Goal**

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

Add Goal Cancel Save and

1. GENERAL

*Fields are required.

* Goal Name

* Goal Type: Employee Goal

Goal Due Date: Select date (MM/DD/YY)

* Category: Select one

Assignee: Test Employee

Description

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.

*Fields are required.

* Goal Name
Goal #1 Sample

* Goal Type: Employee Goal
Goal Due Date: 05/31/2025
* Category: Select one (dropdown menu open showing: Student Access, Student Success, Teaching Excellence, Community Success, Operational Effectiveness)

Assignee
Test Employee

Description

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.”

Add Goal [Cancel] [Save and Add Another] [Save]

1. GENERAL

*Fields are required.

* Goal Name
Goal #1 Sample

* Goal Type: Employee Goal
Goal Due Date: 05/31/2025
* Category: Operational Effectiveness

Assignee
Test Employee

Description
This is where the goal is described in detail.

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.

Add Goal [Cancel] [Save and Add Another] [Save]

1. GENERAL

*Fields are required.

* Goal Name
Goal #2 Sample

* Goal Type: Employee Goal | Goal Due Date: 05/31/2025 | * Category: Student Success

Assignee: Test Employee

Description: This is where the goal is described in detail.

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.

Add/Edit Content | Task Due Date: Sat, Jun 15, 2024 | Employee: Test Employee | Position: Test Position | Department: Department for testing only | Evaluation: APT Employee Performance PI

GOALS SECTION | 3 LEVEL RATING (NON-SCORED) | + Add Goals

GOALS

List TWO specific and measurable GOALS. Click "Add Goals," then select the LAST option in the drop-down box, "New Goal." List May 31 as the Due Date. Name the goal, then select the "goal category" that best fits your goal (these categories relate to the MCC Strategic Plan). Next, add goal details in the description box. When you are finished entering your first goal, add a second one. When both are entered, click the green "Submit Content" button. Your supervisor will review your goals. If edits are needed, they will contact you outside of NEOED (email, phone, etc.) to request that you make revisions. Once your goals are acceptable, your supervisor will sign off on them. You will then sign off on your goals. The goal setting process should be completed within 30 days of starting the appraisal cycle. Supervisors will complete a "mid-year check-in" on goal progress for employees completing a full year appraisal cycle. In April, you will provide a goal progress update.

	Items	Description	Due Date	Actions
::	Goal #1 Sample	This is where the goal is described in detail.	05/31/2025	
::	Goal #2 Sample	This is where the goal is described in detail.	05/31/2025	

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

Edit Goal [Cancel] [Save]

1. GENERAL

*Fields are required.

* Goal Name
Goal #2 Sample

* Goal Type: Employee Goal | Goal Due Date: 05/31/2025 | * Category: Student Success

Assignee: Test Employee

Description: This is where the goal is described in detail. This added text is an edit!

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.

Add/Edit Content

Task Due Date:
Sat, Jun 15, 2024

Employee:
Test Employee

Position:
Test Position

Department:
Department for testing only

Evaluation:
APT Employee Performance PI

Evaluation Due Date:
Fri, May 31, 2024

Submit Content

GOAL SECTION 1 3 LEVEL RATING (NON-SCORED) + Add Goals

GOALS

List TWO specific and measurable GOALS. Click "Add Goals," then select the LAST option in the drop-down box, "New Goal." List May 31 as the Due Date. Name the goal, then select the "goal category" that best fits your goal (these categories relate to the MCC Strategic Plan). Next, add goal details in the description box. When you are finished entering your first goal, add a second one. When both are entered, click the green "Submit Content" button. Your supervisor will review your goals. If edits are needed, they will contact you outside of NEOED (email, phone, etc.) to request that you make revisions. Once your goals are acceptable, your supervisor will sign off on them. You will then sign off on your goals. The goal setting process should be completed within 30 days of starting the appraisal cycle. Supervisors will complete a "mid-year check-in" on goal progress for employees completing a full year appraisal cycle. In April, you will provide a goal progress update.

Items	Description	Due Date	Actions
Goal #1 Sample	This is where the goal is described in detail.	05/31/2025	✎
Goal #2 Sample	This is where the goal is described in detail. This added text is an edit.	05/31/2025	✎

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.

Submit Content

Are you sure you are finished with adding content for this evaluation?

GOALS: ✔ Item(s) Added

No, Let's Go Back
Yes, I'm Finished

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.

TEST EMPLOYEE

Position: Test Position

Department: Department for testing only

View Org Chart

Manager(s)

EVALUATION DETAILS
Current Status: Before Ratings
Type: Periodic

SCORES
OVERALL RATING
Pending

EMPLOYEE DETAILS
Position: Test Position
Department: Department for testing only

Content: Process + Add To

*Steps are required.

Evaluation Due Date: Fri, May 31, 2024


Before Ratings

Employee Adds Two Goals *	Due	Status
Test Employee	Sat, Jun 15, 2024	Completed on 05/14/2024
Signature *	Due	Status
Test Manager	Sat, Jun 29, 2024	Current
Signature *	Due	Status
Test Employee	Sun, Jun 30, 2024	Pending

8

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.**



TE

TEST EMPLOYEE

Position:
Test Position

Department:
Department for testing only


[View Org Chart](#)

Manager(s)

TM

APT Employee Performance Planning and Evaluation

Due Date: Fri. May. 31, 2024

 Print

EVALUATION DETAILS

Current Status: Before Ratings

Type: Periodic

SCORES

OVERALL RATING
Pending

EMPLOYEE DETAILS

Position: Test Position

Department: Department for testing only

Content

Process

COMPETENCY SECTION | 3 LEVEL RATING (N/A) - NON-SCORED

COMPETENCIES

If you are a supervisor, you will be rated on all six of the following competencies. Non-supervisors will not be rated on the "supervision/management" competency. For the competency relating to fulfilling your job duties, please reference your official job description, which should be attached to your NEOED Perform Employee profile. If it is not there, contact Human Resources and request that they add it to your profile or provide you with a copy. **DO NOT EDIT ANY OF THE COMPETENCIES IN THIS SECTION OR ADD ANYTHING FROM THE BUILT-IN COMPETENCY LIBRARY. SKIP TO THE NEXT SECTION TO ADD YOUR GOALS.**

Items	Description
Planning, Organizing, and Coordinating	To what extent does employee develop goals, objectives, plans, and procedures; set priorities, schedules and deadlines to avert crises; ma...
Interpersonal Relations and Communications	To what extent does employee maintain smooth working relations, support, and respect of others; demonstrate tact and diplomacy in negot...
Problem Analysis and Decision Making	To what extent does employee identify and define potential and real problems; obtain facts before making decisions; seek input from other...
Organizational Commitment and Adaptability/Professional Contributions and Acco...	To what extent does employee possess knowledge of established policies and procedures and apply them consistently; convey a positive ...
Supervision/management	To what extent does the employee effectively manage personnel and other resources to achieve quality outcomes; communicate expectati...
JOB DUTIES	To what extent does the employee demonstrate the necessary skills, knowledge, and competency to successfully perform the duties and re...

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).

GOAL SECTION | 3 LEVEL RATING (NON-SCORED)

GOALS

List TWO specific and measurable GOALS. Click "Add Goals," then select the LAST option in the drop-down box, "New Goal." List May 31 as the Due Date. Name the goal, then select the "goal category" that best fits your goal (these categories relate to the MCC Strategic Plan). Next, add goal details in the description box. When you are finished entering your first goal, add a second one. When both are entered, click the green "Submit Content" button. Your supervisor will review your goals. If edits are needed, they will contact you outside of NEOED (email, phone, etc.) to request that you make revisions. Once your goals are acceptable, your supervisor will sign off on them. You will then sign off on your goals. The goal setting process should be completed within 30 days of starting the appraisal cycle. Supervisors will complete a "mid-year check-in" on goal progress for employees completing a full year appraisal cycle. In April, you will provide a goal progress update.

Items	Description	Progress	Due Date
Goal #1 Sample	This is where the goal is described in detail.	0 % <div style="width: 100px; height: 10px; background-color: #ccc; border: 1px solid #000;"></div>	05/31/2025
Goal #2 Sample	This is where the goal is described in detail. This added text is an edit.	0 % <div style="width: 100px; height: 10px; background-color: #ccc; border: 1px solid #000;"></div>	05/31/2025

EVALUATION OVERALL SECTION | 3 LEVEL RATING (NON-SCORED)

Overall Rating

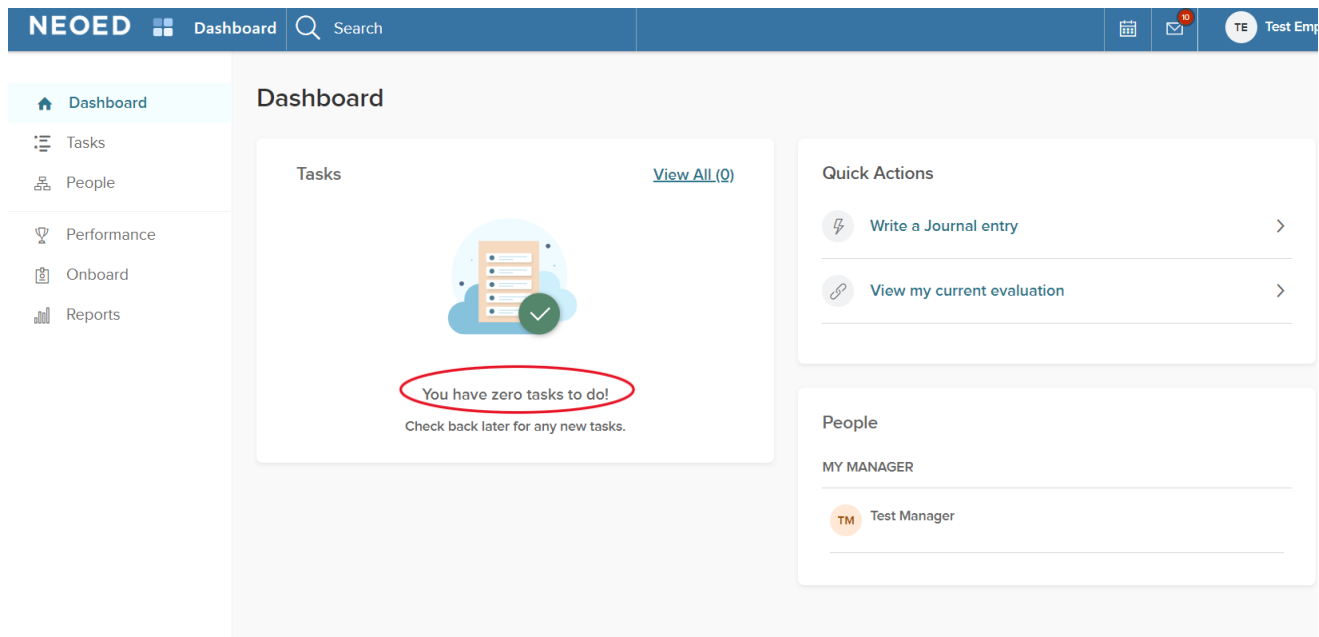
In April, you will be asked to submit a goal progress update to your supervisor describing how you achieved your goals. After this step is completed, your supervisor will rate you on your job performance. You will be rated on the level of excellence you achieved in meeting each of the core competencies assigned to all APT employees and the goals you set at the beginning of the appraisal cycle. You will then be assigned an overall rating. The three levels of ratings are Exemplary, Commendable, and Needs Improvement. Your supervisor will enter comments to elaborate on the ratings assigned. A "Needs Improvement" rating may require a Performance Improvement Plan.

Add Notes & Attachments

+ Add Notes & Attachments

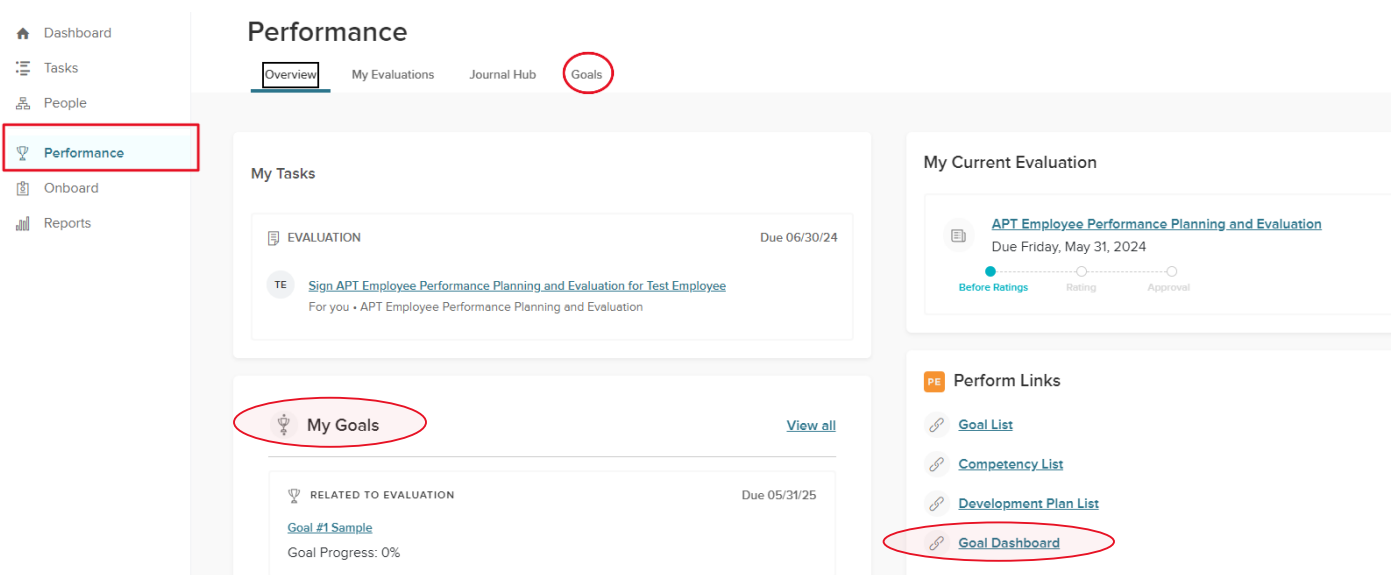
Goals Approval & Signatures

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.



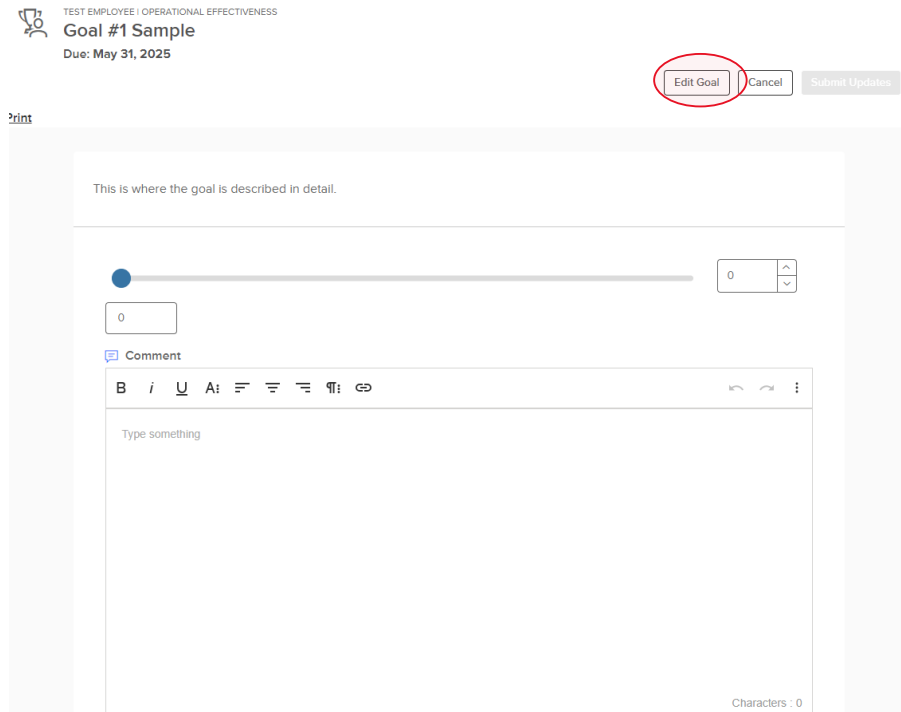
Editing Goals After Submitted

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.



TEST EMPLOYEE | OPERATIONAL EFFECTIVENESS
Goal #1 Sample
Due: May 31, 2025

Print

This is where the goal is described in detail.

0

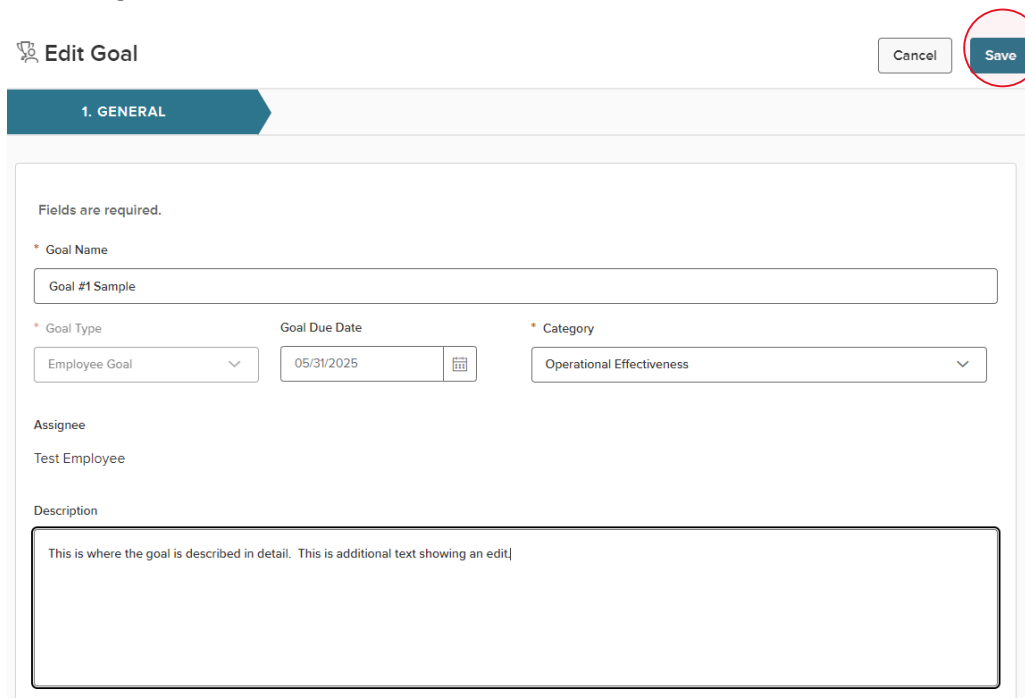
Comment

Type something

Characters : 0

Edit Goal Cancel Submit Updates

Make your edits to the goal and click the “Save” button.



Edit Goal Cancel Save

1. GENERAL

Fields are required.

* Goal Name
Goal #1 Sample

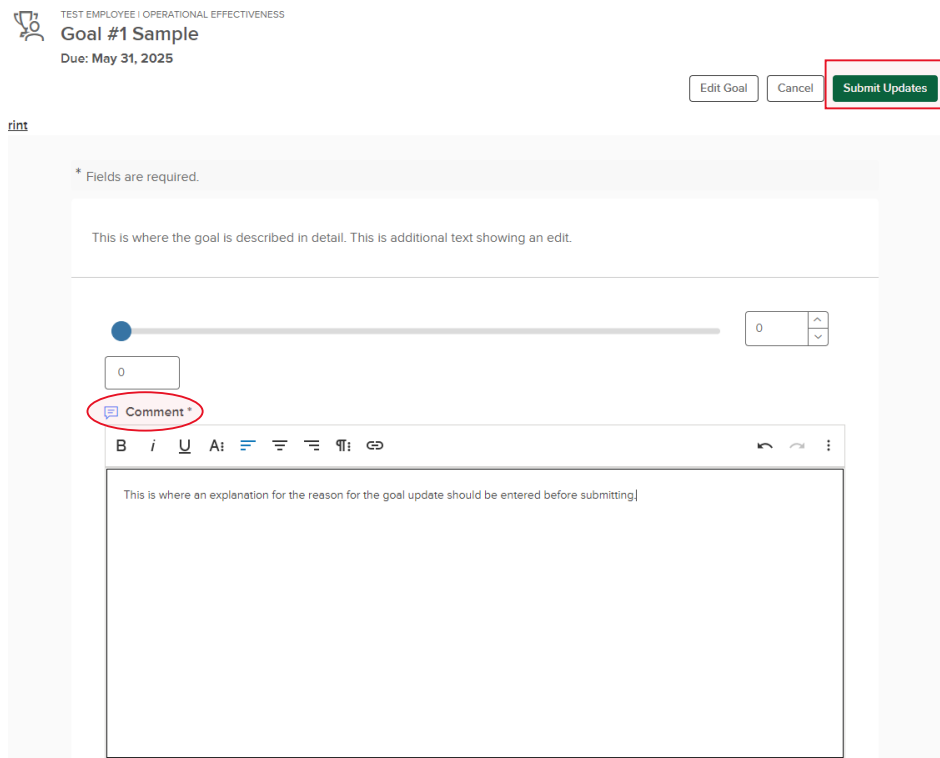
* Goal Type Employee Goal Goal Due Date 05/31/2025 * Category Operational Effectiveness

Assignee
Test Employee

Description
This is where the goal is described in detail. This is additional text showing an edit.

Editing Goals After Submitted, continued:

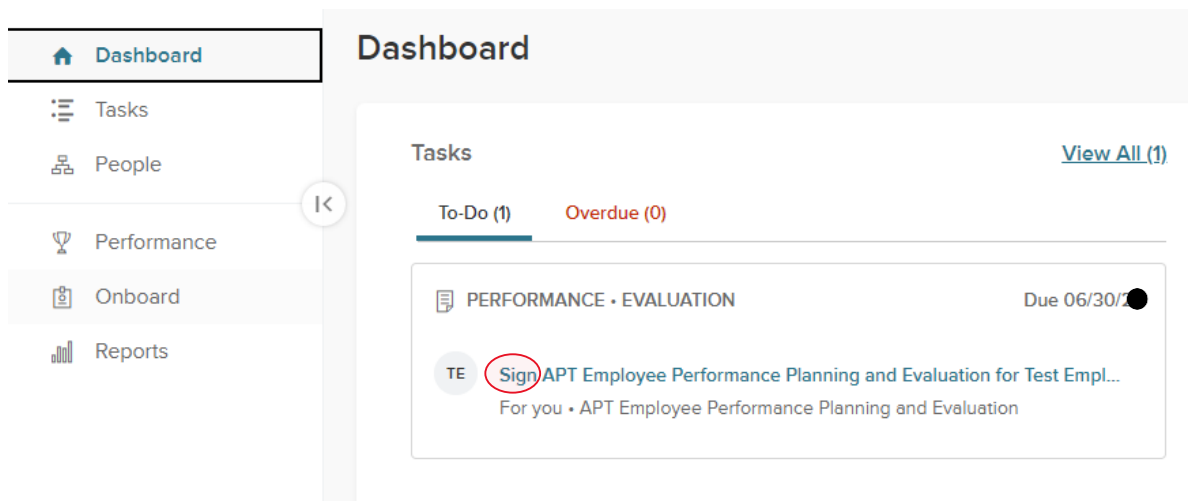
After you have made your requested edits and clicked on “Save,” you will see a screen with your updated goal. **You MUST add a comment in the box explaining why the update was made.** Once you have included a comment explaining the reason for the update, click the “**Submit Updates**” button in the upper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

TE Sign APT Employee Performance Planning and Evaluation for Test Empl...
For you • APT Employee Performance Planning and Evaluation

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.

Acknowledgment Form [Go to Evaluation Details >](#)

TE Test Employee
Test Position

EVALUATION NAME: APT Employee Performance Planning and Evaluation
DUE DATE: Fri. May. 31, 2024

[Sign](#)

Acknowledgers

TM Test Manager	Status	Status Date	Comment
	Acknowledged	Tue. May. 14, 2024 2:38:07 PM	Comments relating to the goals for the appraisal period.

Content

SECTIONS

COMPETENCIES

GOALS

ALL SECTIONS

COMPETENCIES

COMPETENCY SECTION | 3 LEVEL RATING (N/A) - NON-SCORED

If you are a supervisor, you will be rated on all six of the following competencies. Non-supervisors will not be rated on the "supervision/management" competency. For the competency relating to fulfilling your job duties, please reference your official job description, which should be attached to your NEOED Perform Employee profile. If it is not there, contact Human Resources and request that they add it to your profile or provide you with a copy. DO NOT EDIT ANY OF THE COMPETENCIES IN THIS SECTION OR ADD ANYTHING FROM THE BUILT-IN COMPETENCY LIBRARY. SKIP TO THE NEXT SECTION TO ADD YOUR GOALS.

[Collapse All Sections ^](#)
[Collapse Section ^](#)

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.

Content

SECTIONS

COMPETENCIES

GOALS

ALL SECTIONS

GOALS

GOAL SECTION | 3 LEVEL RATING (NON-SCORED)

List TWO specific and measurable GOALS. Click "Add Goals" then select the LAST option in the drop-down box, "New Goal." List May 31 as the Due Date. Name the goal, then select the "goal category" that best fits your goal (these categories relate to the MCC Strategic Plan). Next, add goal details in the description box. When you are finished entering your first goal, add a second one. When both are entered, click the green "Submit Content" button. Your supervisor will review your goals. If edits are needed, they will contact you outside of NEOED (email, phone, etc.) to request that you make revisions. Once your goals are acceptable, your supervisor will sign off on them. You will then sign off on your goals. The goal setting process should be completed within 30 days of starting the appraisal cycle. Supervisors will complete a "mid-year check-in" on goal progress for employees completing a full year appraisal cycle. In April, you will provide a goal progress update.

Name	Description	Due Date
Goal #1 Sample	This is where the goal is described in detail. This is additional text showing an edit.	05/31/2025
Goal #2 Sample	This is where the goal is described in detail. This added text is an edit.	05/31/2025

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.”

Sign Cancel **Submit**

Comments

Employee comments acknowledging that they have established their goals for the appraisal period and that their supervisor has approved them. |

Please sign your name below

Test Employee

Test Employee May 14, 2024

[Auto-generate](#) [Draw signature](#)

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).

APT Employee Performance Planning and Evaluation
Due Date: Fri. May. 31, 2024

Print

EVALUATION DETAILS

Current Status: Before Ratings
Type: Periodic

SCORES

OVERALL RATING
Pending

EMPLOYEE DETAILS

Position: Test Position
Department: Department for testing only

Content Process

💡 **COMPETENCY SECTION | 3 LEVEL RATING (N/A) - NON-SCORED**

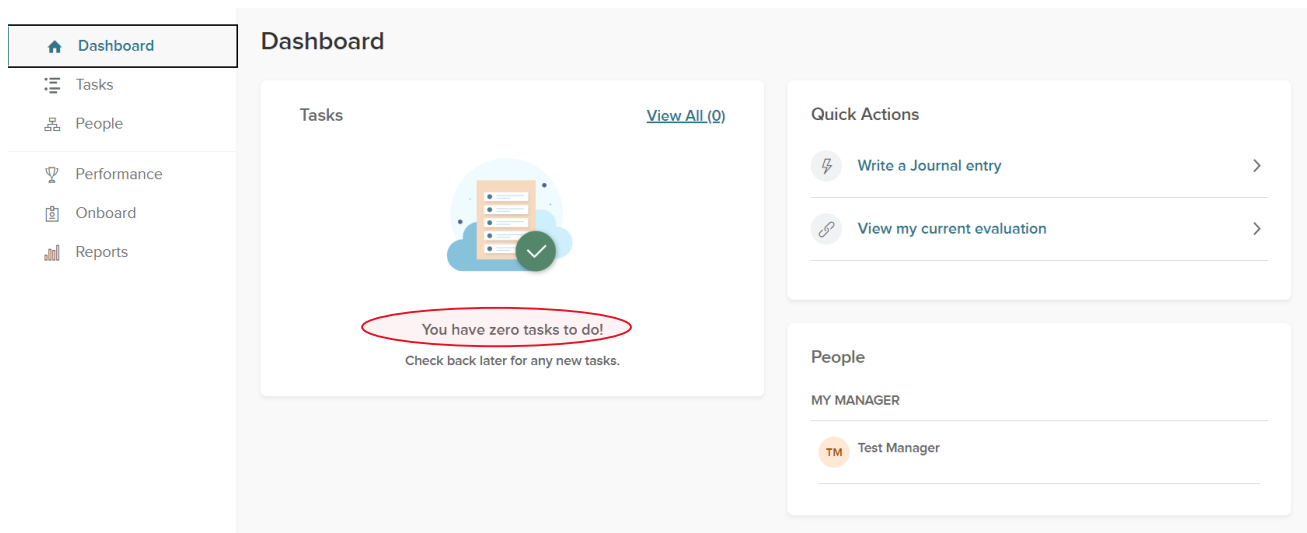
COMPETENCIES

If you are a supervisor, you will be rated on all six of the following competencies. Non-supervisors will not be rated on the "supervision/management" competency. For the competency relating to fulfilling your job duties, please reference your official job description, which should be attached to your NEOED Perform Employee profile. If it is not there, contact Human Resources and request that they add it to your profile or provide you with a copy. DO NOT EDIT ANY OF THE COMPETENCIES IN THIS SECTION OR ADD ANYTHING FROM THE BUILT-IN COMPETENCY LIBRARY. SKIP TO THE NEXT SECTION TO ADD YOUR GOALS.

Items	Description
Planning, Organizing, and Coordinating	To what extent does employee develop goals, objectives, plans, and procedures; set priorities, schedules and deadlines to avert crises; man...
Interpersonal Relations and Communications	To what extent does employee maintain smooth working relations, support, and respect of others; demonstrate tact and diplomacy in negot...
Problem Analysis and Decision Making	To what extent does employee identify and define potential and real problems; obtain facts before making decisions; seek input from other...

Signing Off on Your Goals, continued:

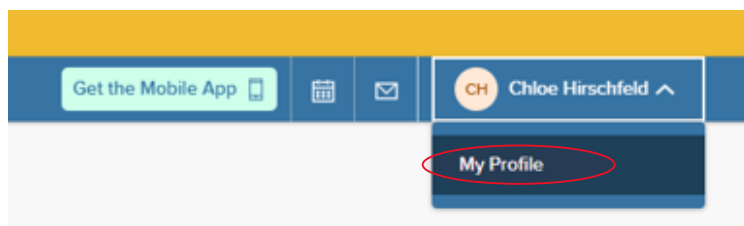
You will now see that zero tasks are due on your dashboard, meaning that you have completed the goal setting and approval process!



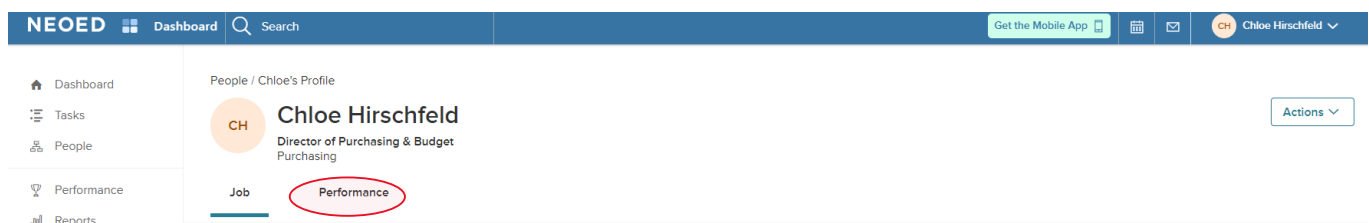
The next phase of the Performance Plan is for you to work on accomplishing your goals and fulfilling the expectations of the core competencies. **Remember, one of the competencies relates to performing your job duties as listed in your job description.** The next section explains how to access your job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

Dashboard
Tasks
People
Performance
Reports

People / Chloe's Profile

CH Chloe Hirschfeld
Director of Purchasing & Budget
Purchasing

Job **Performance**

Performance

Performance Evaluations

Current (1) Upcoming (0) Completed (0) Other (0) All (1)

Annual APT Performance Evaluation (Partial Year) (due 04 / 30 / 2024)
Due Tuesday, April 30, 2024 • Type: Periodic

Before Ratings Rating Approval

Current

Performance Documents Upload

The maximum allowed file size is 20MB

101210 - Director of Purchasing_ Revision 012324.docx

Uploaded on 03/12/2024

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.”

Dashboard

Tasks [View All \(0\)](#)

You have zero tasks to do!
Check back later for any new tasks.

Quick Actions

Write a Journal entry

View my current evaluation

People

MY MANAGER

TM Test Manager

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.”)

Write a Journal Entry Close

Who is this entry about?

Start typing here to find an employee

Journals can also be created by sending an email to journals@neoed.com. The email subject should be the employee's full name. One attachment can be included (5MB max and supported types: pdf, xls,xlsx, ppt, pptx, potx, doc, docx, txt, rtf, bmp, gif, jpe, jpeg, jpg, png, tif, tiff, wp, wpd, csv, zip.)

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.

Write a Journal Entry Close

New Entry Past Entries

B *i* U **A:**

This is a sample of adding a new journal entry. You can also click on "Past Entries," if applicable.

Draft Autosaved on 4/23/2024, 2:05:59 PM

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 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.

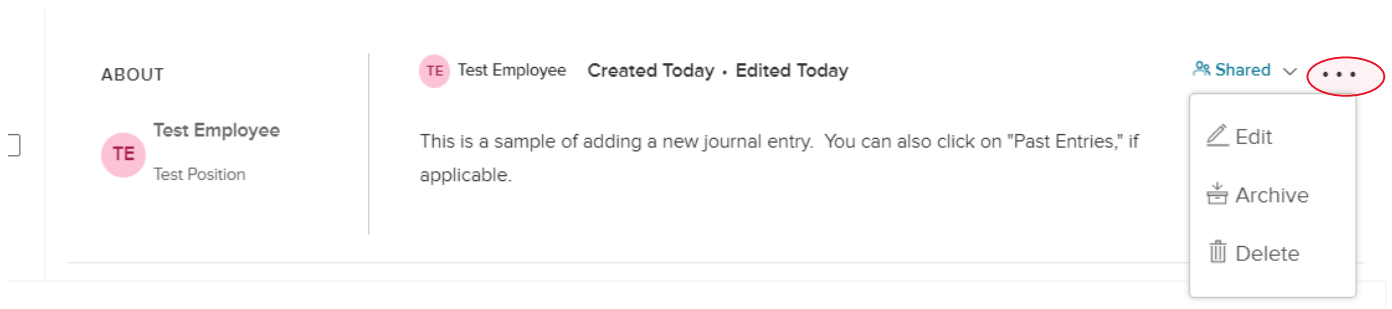
The screenshot shows the Performance Journal Hub interface. On the left is a navigation menu with items: Dashboard, Tasks, People, Performance (circled in red), Onboard, and Reports. The main content area is titled "Performance" and has sub-tabs: Overview, My Evaluations, Journal Hub (circled in red), and Goals. Below the sub-tabs is a "Journal Hub for" section with a dropdown menu set to "Myself". There are four filters: Current (1), Pending (0), Archived (0), and All Drafts (1). Below the filters are "Sort" and "Actions" buttons. A blue information box contains the text: "Journals can also be created by sending an email to journals@neoed.com. The email subject should be the employee's full name. One attachment can be included (5MB max and supported types: pdf, xls,xlsx, ppt, pptx, potx, doc, docx, txt, rtf, bmp, gif, jpe, jpeg, jpg, png, tif, tiff, wp, wpd, csv, zip.)". Below this is a "Sort: Update Date • Newest First" section. The main content area shows a list of journal entries. The first entry is titled "ABOUT" and is by "Test Employee" (TE) at "Test Position". It includes a checkbox, a profile picture, and the text: "This is a sample of adding a new journal entry. You can also click on 'Past Entries,' if applicable." To the right of the entry is a "Shared" status with a dropdown arrow (circled in red) and three dots.

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.

This screenshot shows the same Journal Hub interface as above, but with a sharing modal open. The modal is titled "Make Entry Private" and has a close button (X). Below the title is a "Share Entry" section with a search bar and a list of users. One user, "TM Test Manager" (with a red X icon), is listed. The "Shared" dropdown from the previous screenshot is circled in red. At the bottom of the page, there is a pagination control showing "First", "Previous", "1" (selected), "Next", "Last", and "10" items per page.

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.

Dashboard

Tasks

[View All \(1\)](#)

To-Do (1)

Overdue (0)



PERFORMANCE • EVALUATION

Due 12/03/24

TE

Sign Test Employee TestEmployee APT Employee Performan...

For you • Test Employee TestEmployee APT Employee Perform...

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.

Acknowledgment Form Go to Evaluation Details >

TE Test Employee
Test Position

EVALUATION NAME: Test Employee
TestEmployee APT
Employee Performance
Planning and Evaluation
(due// 2025)

DUE DATE: Sat. May. 31, 2025

Sign

Acknowledgers

Name	Status	Status Date	Comment
TM Test Manager	Acknowledged	Fri. Oct. 25, 2024 3:54:27 PM	Comments relating to the goals for the appraisal period.
TE Test Employee	Acknowledged	Fri. Oct. 25, 2024 4:16:35 PM	Employee comments acknowledging that they have established their goals for the appraisal period and that their supervisor has approved them.

Content

SECTIONS

COMPETENCIES

GOALS

Check-In Forms

ALL SECTIONS

COMPETENCY SECTION 1 3 LEVEL RATING (N/A) - NON-SCORED

COMPETENCIES

If you are a supervisor, you will be rated on all of the following competencies. Non-supervisors will not be rated on the "supervision/management" competency. For the competency relating to fulfilling your job duties, please reference your official job description, which should be attached to your NEOED Perform Employee profile. If it is not there, contact Human Resources and request that they add it to your profile or provide you with a copy. DO NOT EDIT OR ADD TO ANY OF THE COMPETENCIES IN THIS SECTION. SKIP TO THE NEXT SECTION TO ADD YOUR GOALS.

Name	Description
------	-------------

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.*

Content

SECTIONS

COMPETENCIES

GOALS

Check-In Forms

ALL SECTIONS

CHECK-IN SECTION 1 TEXT ONLY

Check-In Forms

By Test Manager

Test Manager

Please describe the employee's progress toward meeting the Performance Plan's core competencies and their goals.

This is a description of the employee's progress toward meeting the Performance Plan's core competencies and the goals set by the employee.

If applicable, list any changes to the employee's Performance Plan or goals.

This is where any changes to the Performance Plan would be described.

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.

Sign Cancel **Submit**

Comments

This is where the employee writes any comments regarding the mid-year progress check-in completed by their supervisor.

Please sign your name below

Test Employee

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.

Dashboard

Tasks [View All \(1\)](#)

To-Do (1) Overdue (0)

PERFORMANCE • CHECK INDue 04/29/25

TE

Employee Provides Goals Progress Update

For you • Test Employee TestEmployee APT Employee Performance Planning and Eval...

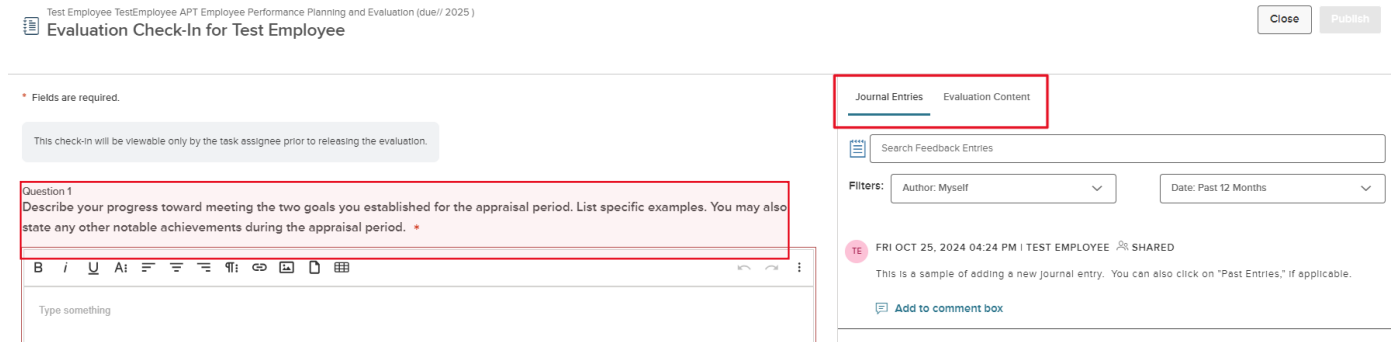
End-of-Evaluation-Cycle Goals Progress Update, continued:

Goals Progress Update Check-in Form:

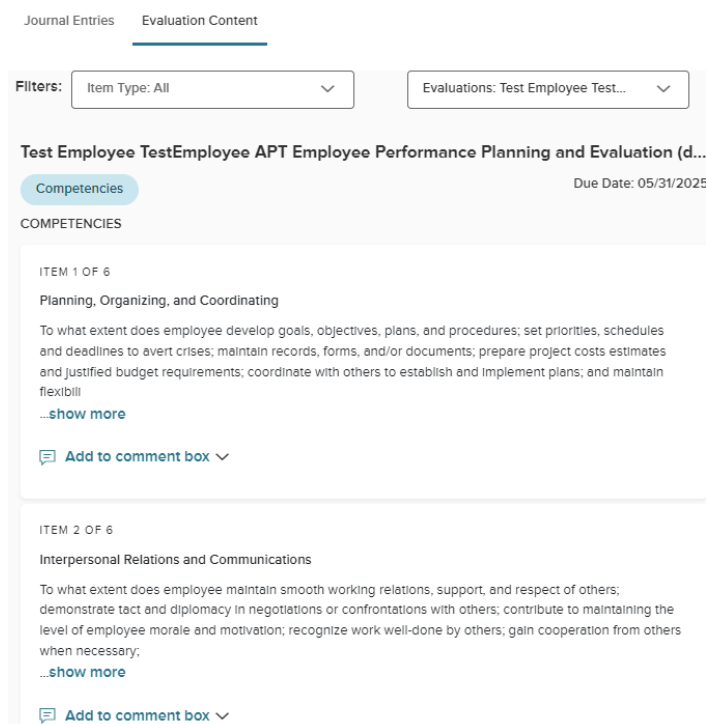
After clicking on the “Employee Provides Goals Progress Update” task, the Check-in form will open. You must answer the question, “Describe your progress toward meeting the two goals you established for the evaluation period. List specific examples. You may also state any other notable achievements during 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.”

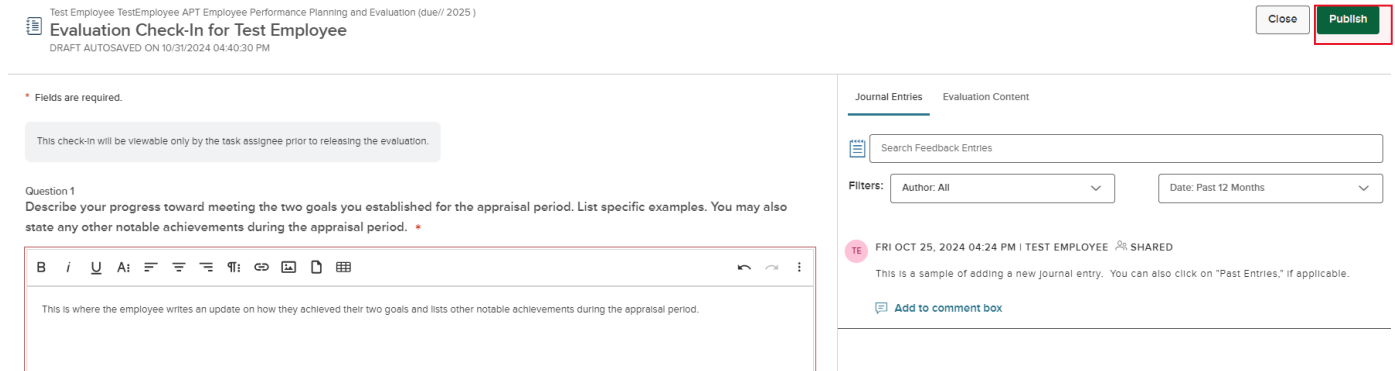


The Evaluation Content tab will list an overview of the core competencies you will be evaluated on, as well as the goals you set for the evaluation period (scroll down to see the goals section). You can click “Add to comment box” to add any of the Journal Entries or Evaluation Content to your Check-in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



End-of-Cycle Goals Progress Update, continued:

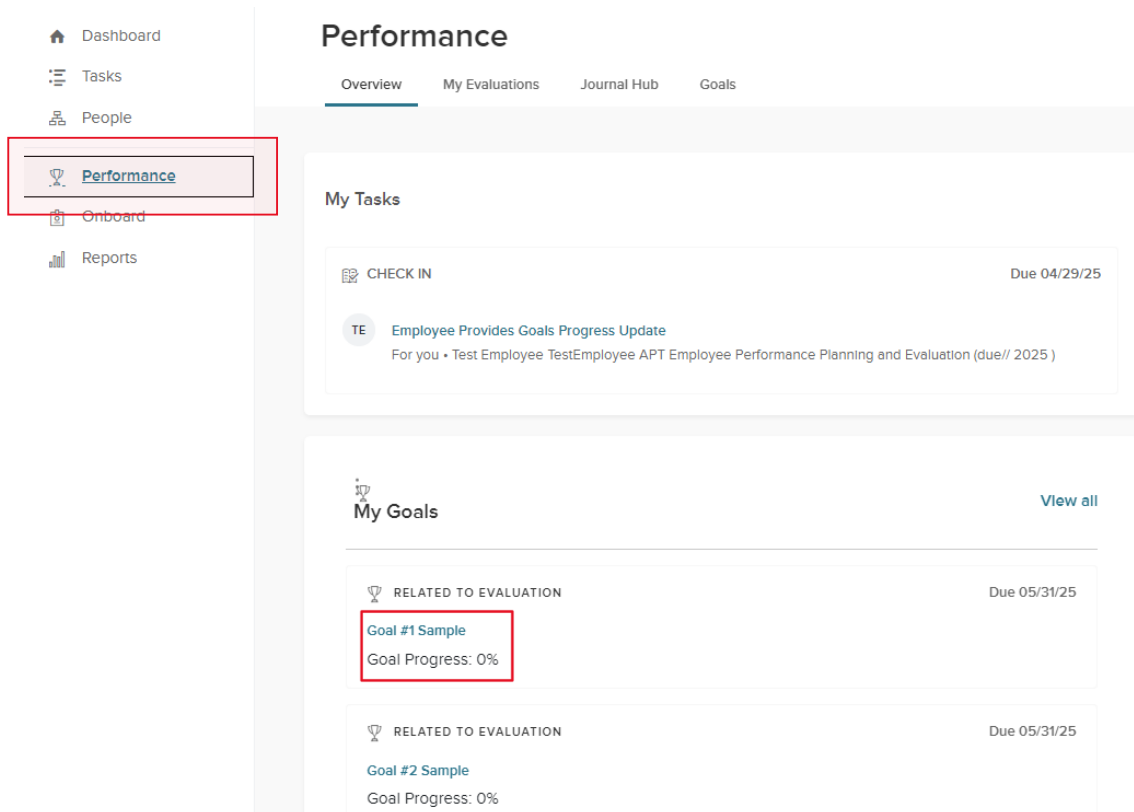
Once you type your answer in the text box, you will see the **“Publish”** button turn green. When you are ready to submit your Goals Progress Update, click **“Publish.”**



*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.***

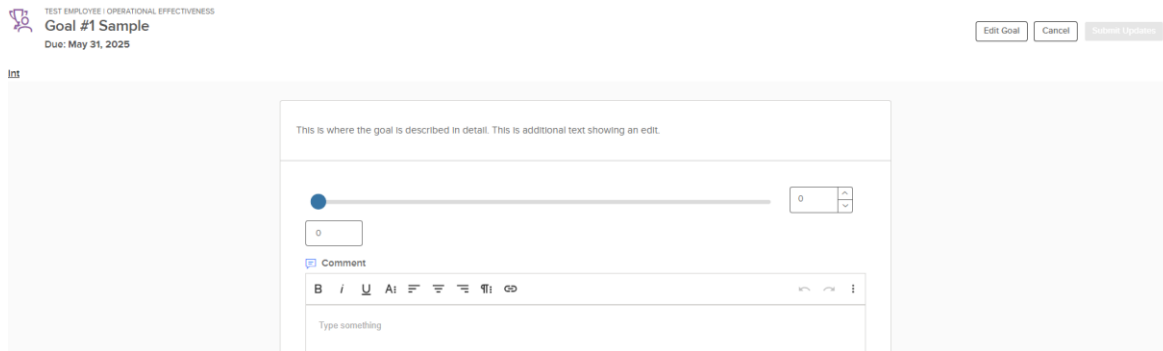
Optional Additional Goal Updates (prior to Check-in step)

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.

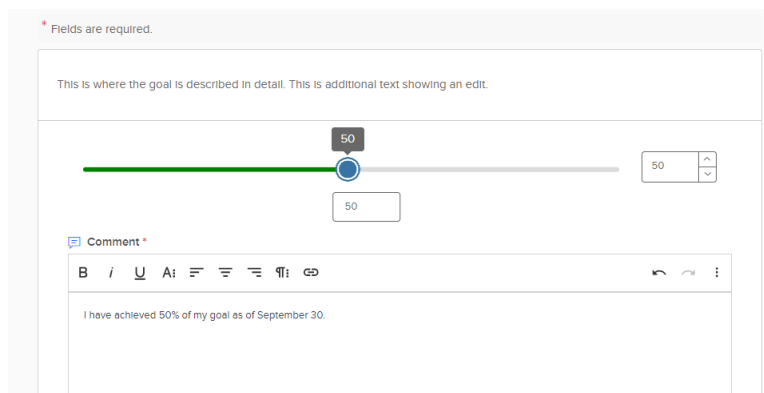


Optional Additional Goal Updates, continued:

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.

Tasks

[View All \(1\)](#)

To-Do (1) Overdue (0)

PERFORMANCE • EVALUATION Due 05/31/25

TE **Sign** Test Employee TestEmployee APT Employee Performance Planning and Evaluation (due// 2025) for Test Emp...
For you • Test Employee TestEmployee APT Employee Performance Planning and Evaluation (due// 2025)

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.

The screenshot shows the 'Acknowledgment Form' for 'Test Employee' (TE) at 'Test Position'. The evaluation name is 'Test Employee TestEmployee APT Employee Performance Planning and Evaluation (due// 2025)' and the due date is 'Set. May. 31. 2025'. A green 'Sign' button is in the top right. Below is the 'Ratings Summary' for 'Test Manager' (TM) at 'Test Position', showing an 'Overall Rating' of 'Commendable'. The main content area is divided into 'SECTIONS' (Overall Rating, Check-In Forms, ALL SECTIONS) and 'COMPETENCIES'. The 'COMPETENCIES' section is expanded to show 'Planning, Organizing, and Coordinating' with a 'Commendable' rating and a comment box containing the text 'This is where the supervisor describes why the rating was given for this competency.'.

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.

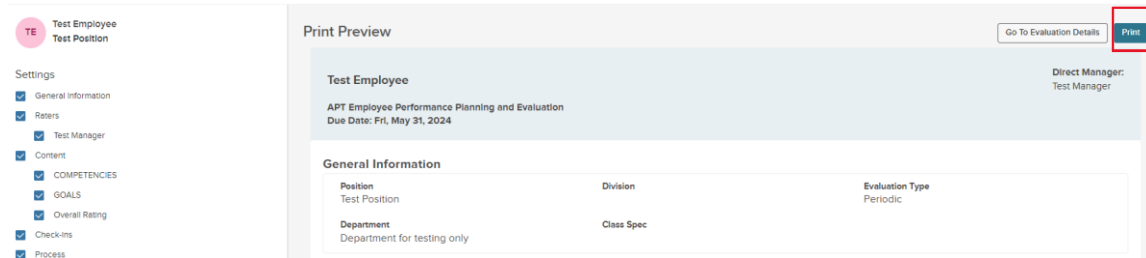
A close-up of the left sidebar navigation menu. The 'COMPETENCIES' option is highlighted with a red box, indicating it is the selected section.

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.”

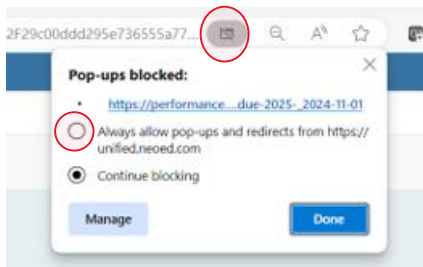
The screenshot shows the 'Sign' process. At the top, there are 'Cancel' and 'Submit' buttons. Below is a 'Comments' section with a text area for 'Write comment here...'. At the bottom, there is a signature line with the text 'Please sign your name below', a signature 'Test Employee', and the date 'May 16, 2024'. There are also links for 'Auto-generate' and 'Draw signature'.

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.

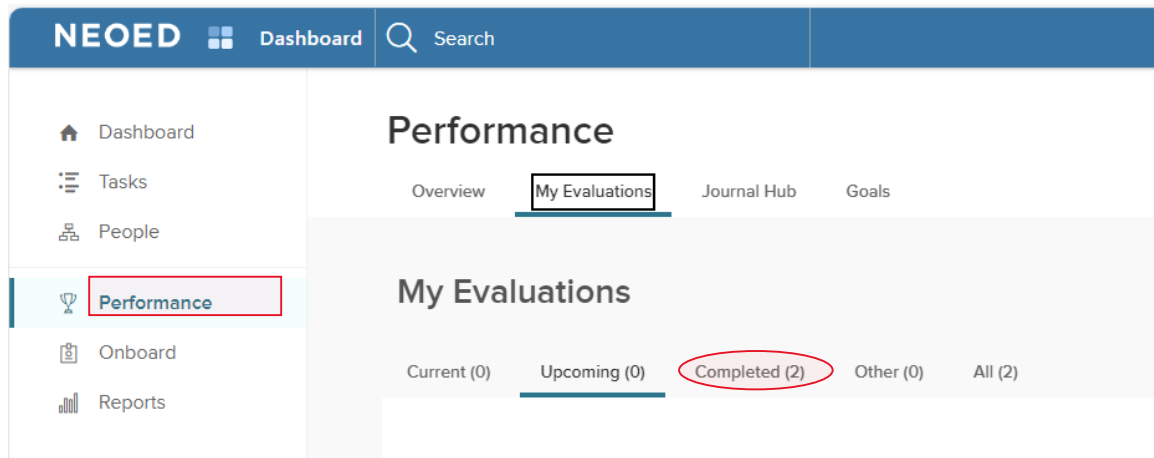


If you have trouble printing, it may mean that the pop up was blocked. Click on the icon in the page's address bar and click "Always Allow pop-ups . . ."



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!