

NeoGov PERFORM: Bulk Performance Planning Walkthrough

Click on “Bulk Actions” and then “Assign Goal Planning.”

The screenshot displays the NeoGov PERFORM interface. At the top, the navigation bar includes the logo, a dropdown menu for 'Perform', and a search bar. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Reports', and 'Help'. The main content area is titled 'Evaluation List' and contains two tabs: 'Evaluation List' and 'Bulk Actions'. A message indicates that 2 records are selected. Below this, a table lists performance evaluations with columns for Name, Employee #, Employee, Department, Name (with a search filter 'oprah'), Type, and Date. The table contains three rows, with the last two rows selected. On the right side, an 'Actions' menu is open, showing options for 'EXPORT ACTIONS' (Export to PDF, Excel, CSV) and 'EVALUATION BULK ACTIONS' (Change Due Date, Delete, Assign Goal Planning, Configure Reminder & Overdue Notifications, Edit, Print, Start Review / Draft Status). The 'Assign Goal Planning' option is highlighted with a blue circle and a trophy icon. A 'Done' button is located at the top right of the Actions menu. A chat icon is visible in the bottom right corner of the interface.

	Name	Employee #	Employee	Department	oprah	Type	Date
<input type="checkbox"/>	2018 PERFORMANCE PLANNING AND EVA...	00000000	Sandra Bullock	Civil Service Department	Oprah Winfrey	Periodic	04/0
<input checked="" type="checkbox"/>	2019 PERFORMANCE PLANNING AND EVA...	00000000	Sandra Bullock	Civil Service Department	Oprah Winfrey	Periodic	04/0
<input checked="" type="checkbox"/>	2019 PERFORMANCE PLANNING AND EVA...	27	Morgan Freeman	Civil Service Department	Oprah Winfrey	Periodic	04/0

On this screen, fill out the "Section to Add Goal Planning."

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Search

67

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Step 2 of 3: Goal Planning Assignment

+ Goal Planning

No Goal Planning have been added

Selected Evaluations △ 2 evaluation(s) have multiple Goal Planning sections, please select one manually.

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	Select one
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	Select one

1 - 2 of 2 Items

Cancel Next

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Based on the section you are filling out, you will pick the relevant section from the dropdown menu.

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Step 2 of 3: Goal Planning Assignment

+ Goal Planning

No Goal Planning have been added

Selected Evaluations

2 evaluation(s) have multiple Goal Planning sections, please select one manually.

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	Select one
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 1: DEPARTMENTAL MISSION, VISION, & OBJECTIVES PART 2: GOAL PLANNING: PART 3: WORK TASKS (BEHAVIOR EXPECTATIONS) PART 4: COMPETENCIES, KNOWLEDGE,

Cancel Next

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The process hereon is generally similar to how you will fill out an actual PM form.

The screenshot shows the NEOGOV 'Perform' interface. At the top, there is a navigation bar with 'NEO GOV', 'PE Perform', a search bar, and user information for 'Hugh Jackman'. Below this is a secondary navigation bar with 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Reports', and 'Help'. The main content area is titled 'Step 2 of 3: Goal Planning Assignment'. A large empty box contains a trophy icon and the text 'No Goal Planning have been added'. To the right of this box is a '+ Goal Planning' button with a dropdown menu containing 'From Library' and 'New Goal Planning'. Below this is a 'Selected Evaluations' section with a search icon and a table. The table has columns for Name, Employee, Department, Type, Due Date, Status, Overdue, and Section to Add Goal Planning. It contains two rows of data for '2019 PERFORMANCE PLAN...' for Sandra Bullock and Morgan Freeman. At the bottom of the table, it says '1 - 2 of 2 items'. Below the table are 'Cancel' and 'Next' buttons. The footer includes 'NEO GOV' on the left and 'COPYRIGHT © 2010 - 20' on the right, along with a 'FEEDBACK & HELP' button.

Step 2 of 3: Goal Planning Assignment

No Goal Planning have been added

Selected Evaluations

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 1: DEPARTMENTAL MISSION, VISION... <input type="button" value="v"/>
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 1: DEPARTMENTAL MISSION, VISION... <input type="button" value="v"/>

1 - 2 of 2 items

Cancel Next

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NEOGOV PE P

Add Goal Planning from Library

Cancel Save

Employees Performance Ev

Step 2 of 3: Goal

1 records are selected. [Clear selection](#)


<input checked="" type="checkbox"/>	Q Name	Q mission	Q Description
<input checked="" type="checkbox"/>	Civil Service	Vision/Mission/Objectives	Mission: Partner with City Departments to make the City of New Orleans an empl...

1 - 1 of 1 items

Selected Evaluatic

Name
2019 PERFORMANCE PLAN
2019 PERFORMANCE PLAN

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After adding the relevant section to the bulk action, click “Next.”

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Step 2 of 3: Goal Planning Assignment

+ Goal Planning

Civil Service

Mission: Partner with City Departments to make the City of New Orleans an employer-of-choice and a leader in the management of human resources. To develop and administer a compre...

Selected Evaluations

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 1: DEPARTMENTAL MISSION, VISION... <input type="checkbox"/>
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 1: DEPARTMENTAL MISSION, VISION... <input type="checkbox"/>

1 - 2 of 2 items

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Click "Submit" to confirm your bulk action.

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Step 2 of 3: Confirmation Page

Employee Name	Evaluation Name	Evaluation Type	Evaluation Status	Evaluation Due Date	Section Name	Section Response Format
Morgan Freeman	2019 PERFORMANCE PLANNING AN...	Periodic	Draft	04/01/2020	PART 1: DEPARTMENTAL MISSION, V...	Text Only
Sandra Bullock	2019 PERFORMANCE PLANNING AN...	Periodic	Draft	04/01/2020	PART 1: DEPARTMENTAL MISSION, V...	Text Only

1 - 2 of 2 items

Edit Submit

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When you have a large number of employees to fill this form for, this page generally helps us to know how far the bulk action has progressed.

The screenshot shows the NEOGOV Performance Evaluations interface. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and user information for Hugh Jackman. The main content area is titled 'Step 3 of 3: Bulk Actions Status' and features a 'Go back' button. The central section, 'Action progress', contains a green progress bar at 100% and a message stating 'Bulk operation is complete, records that could not be processed are shown below.' Below this is a URL: <https://performance.neogov.com/evaluation/BulkOperationStatus/1224582a-9591-47c6-b223-377d3dc39524>. The 'Failed Records' section contains a table with the following columns: Name, Employee, Type, Due Date, Status, Released, Overdue, Language, Archived, and Status Message. The table is currently empty, displaying 'No Results Found'. A 'FEEDBACK & HELP' sidebar is visible on the right side of the page.

Note. You will follow the same process to fill the next section of the form until you have filled all 4 of them (i.e., Vision/Mission, Goal Planning, Work Tasks/Behavior Expectations, and Competencies/KSAs).

The following pages show how you/managers can add the goals manually to employees' PM forms in bulk. Unlike the vision/mission section (which uses the "From Library" menu), you can choose "New Goal Planning" if the goals are not already saved in the library.

The same process can be followed to add the work tasks/behavioral expectations.

The screenshot shows the 'Step 2 of 3: Goal Planning Assignment' screen in the NEOGOV system. The top navigation bar includes 'NEO GOV', 'PE Perform', a search bar, and user information for 'Hugh Jackman'. The main menu has 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Reports', and 'Help'. A 'Feedback' button is also visible.

The central area is titled 'Step 2 of 3: Goal Planning Assignment' and contains a large empty box with a trophy icon and the text 'No Goal Planning have been added'. A '+ Goal Planning' button is highlighted, and its dropdown menu is open, showing 'From Library' and 'New Goal Planning' options.

Below this is the 'Selected Evaluations' section, which contains a table with the following data:

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 2: GOAL PLANNING: [dropdown]
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 2: GOAL PLANNING: [dropdown]

At the bottom of the table, it says '1 - 2 of 2 items'. Below the table are 'Cancel' and 'Next' buttons. The footer includes 'NEO GOV' on the left and 'COPYRIGHT © 2010 - 20' on the right, along with a 'FEEDBACK & HELP' button.

Make sure you have filled out the required section on this form.

NEO GOV PE P Add Goal Planning Cancel Save

*** Fields are required.**

Goal Planning Name *
Goal 1:

Goal Planning Due Date **Category ***
select date (MM/DD/YYYY) Goal Planning

Description

Add to Goal Planning Library

ADDITIONAL SETTINGS

REMINDER SETTINGS

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Note. The category section needs to tag the statement to its accurate category.

Click "Next" and then follow the same steps.

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Step 2 of 3: Goal Planning Assignment

+ Goal Planning

Goal 1: goal statement - [edit] [x]

Goal 2: goal statement - [edit] [x]

Goal 3: goal statement - [edit] [x]

Selected Evaluations

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal Planning
2019 PERFORMANCE PLAN...	Sandra Bullock	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 2: GOAL PLANNING: [dropdown]
2019 PERFORMANCE PLAN...	Morgan Freeman	Civil Service Department	Periodic	04/01/2020	Draft	No	PART 2: GOAL PLANNING: [dropdown]

1 - 2 of 2 items

Cancel Next

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