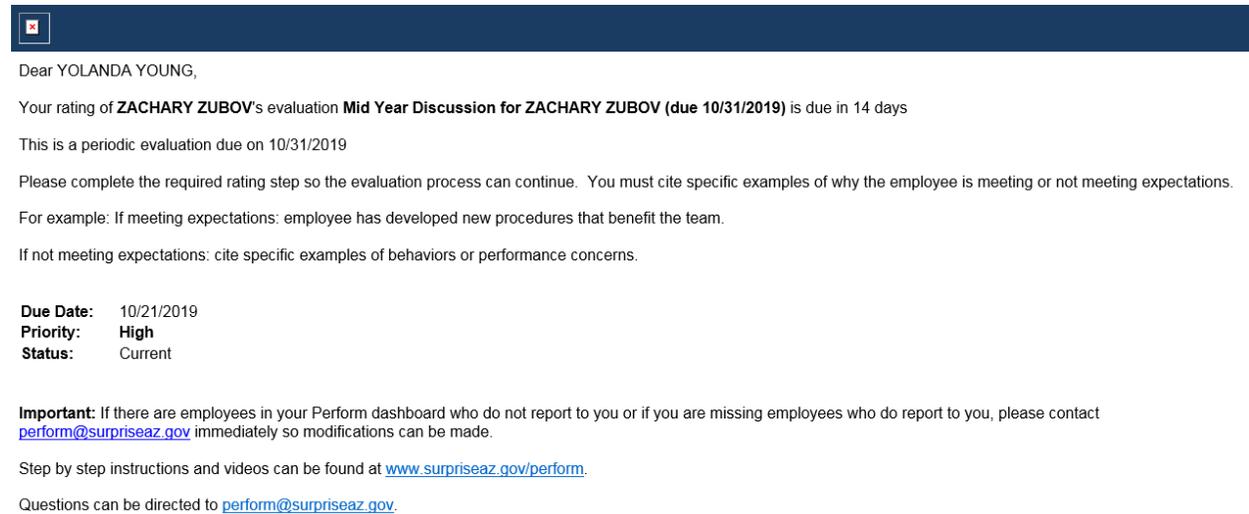


Update Goal Progress / Mid-Year Discussion Step Process

Pursuant to EPM 3.7 Performance Management, supervisors are required to meet to review goals and objectives, expectations, progress, and needed areas of improvement at a *minimum* of three times per year. More frequent discussions are encouraged.

During the month of October you will receive a system generated email advising you that the mid-year discussion for your direct reports is due by 10/31; see example below.



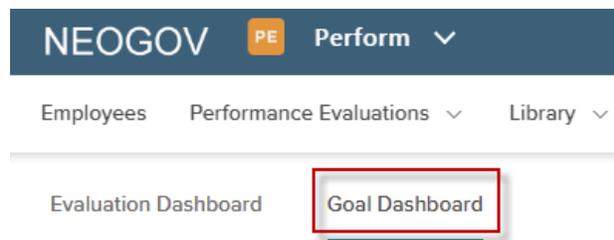
These instructions cover two actions: (1) Update Goal Progress and (2) Mid-year Discussion Steps

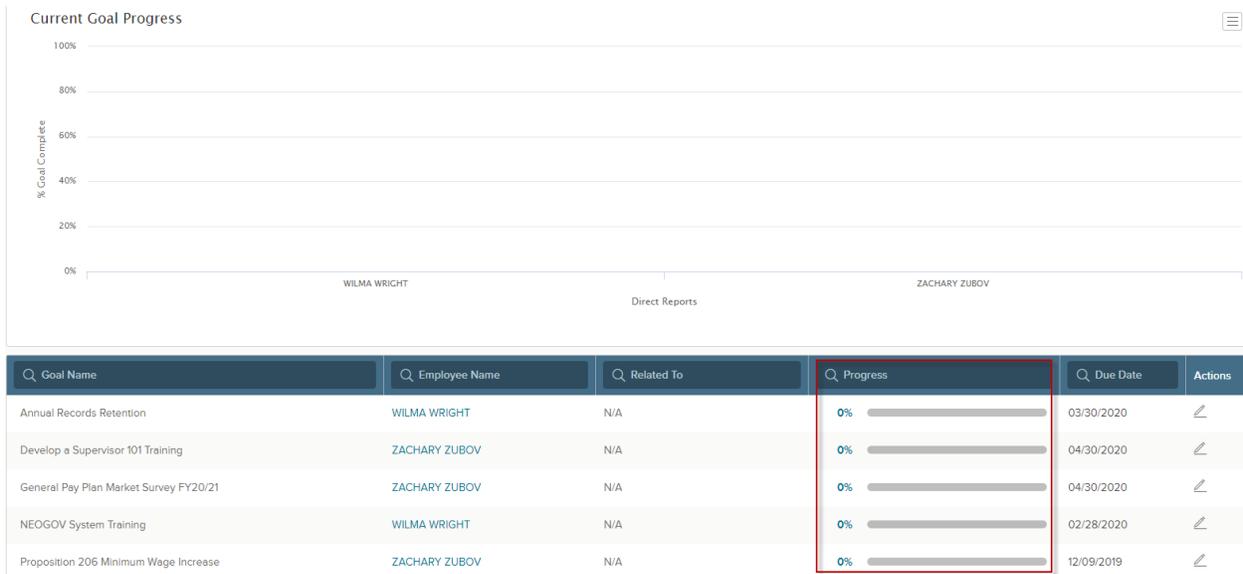
Update Goal Progress

During the mid-year discussion step you may also wish to update the goal progress for each of the assigned goals for your direct reports, though you may assign the updating of goals to your direct report.

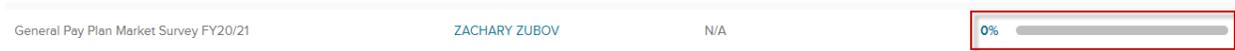
If you are not on the home page, click on **NEOGOV** on the top left of your screen.

Once on the home page, click on Goal Dashboard and scroll down to see each of the goals for your direct reports.





To update the goal progress and enter relevant comments, click into the progress bar area of a goal.



You will be re-directed into the goal content where you can then use the slider bar to indicate the progress percent complete.

- Conduct biennial General Pay Plan market survey for implementation in FY21.
- * Create survey of job titles, salary data, job summaries and minimum qualifications
 - * Send survey to benchmark organizations
 - * Create 'Consolidated data worksheet
 - * Analyze consolidated data, establish job rates and pay grades
 - * Develop summary presentation and present results to HR management
 - * Determine adjustments and prepare memos to impacted employees
 - * Complete post-survey work



Upon sliding the bar to the percentage complete, you will be required to add the relevant comments in support of the percent completed.

20

Comment * ⚠ Comment required when updating Goal progress

B **I** **U**

Comment *

B **I** **U**

Zachary successfully created the market survey template which included 60 job titles and sent the survey to the 11 benchmark organizations for job matches.

Once all comments have been entered click on **Submit Updates** to finalize your entry.

The employee assigned to the goal you updated will receive a system generated email with the comments entered and percent completed; see example below.

donotreply@neogov.com | Zachary Zubov
 Goal "General Pay Plan Market Survey FY20/21" assigned to you has been updated.
 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

*****The e-mail below is from an external source. Please do not open attachments or click links from an unknown or suspicious origin.*****

The following Goal assigned to you on Neogov PE system has been updated:

Goal: [General Pay Plan Market Survey FY20/21](#)
Due Date: 4/30/2020
Priority: Medium

	ACTION	TO	FROM
Goal changes:	Progress changed	20.0%	0.00%
	Comment added	Zachary successfully created the market survey template which included 60 job titles and sent the survey to the 11 benchmark organizations for job matches.	

If your direct report updates the goal progress themselves, you will receive a system generated email with the comments entered and percent completed by the employee; see example below.



The e-mail below is from an external source. Please do not open attachments or click links from an unknown or suspicious origin.

The following Goal assigned to ZACHARY ZUBOV on Neogov PE system has been updated:

Goal: [Proposition 206 Minimum Wage Increase](#)
Due Date: 12/9/2019
Priority: Medium

ACTION	TO	FROM
Progress changed	20.0%	0.00%
Comment added	Adjusted impacted pay plans in compliance with Proposition 206 Minimum Wage increase. Several options will be presented to impacted departments that address pay compression issue for consideration and impact on their respective budget.	

Goal changes:

[View Goal](#)

Complete the above steps for each goal.

Steps to Complete the Mid-Year Discussion

The following steps will guide you through the process of documenting in Perform that you *held* the mid-year discussion with your direct reports.

Access the Mid-Year Discussion task from your Dashboard.

NEOGOV Perform

Employees Performance Evaluations Library Reports Help

Evaluation Dashboard Goal Dashboard

My Tasks [view all](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	0 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table

Task	For Employee	Related To	Due Date
★ Rating For ZACHARY ZUBOV's Mid Year Discussion for ZACHARY ZUBOV (due 10/31/2019)	ZACHARY ZUBOV	Mid Year Discussion for ZACHARY ZUBOV (du...	10/21/2019

1 - 1 of 1 Items

Click on the hyperlink [Rating For ZACHARY ZUBOV's Mid Year Discussion for ZACHARY ZUBOV \(due 10/31/2019\)](#)

You will be re-directed to the Mid-Year Discussion form where you must document your assessment of the employee's performance and expectations to date. *The system will not prompt you to hold the face-to-face mid-year discussion, you must schedule a meeting with your direct report to personally review their performance to date.*

NEOGOV PE Perform

Employees Performance Evaluations Library Reports Help

Feedback +

back to evaluation detail page Submit Evaluation

ZACHARY ZUBOV HR SPECIALIST

Mid Year Discussion for ZACHARY ZUBOV (due 10/31/2019)

SECTIONS

Mid-Year Discussion Summary

COMPETENCY SECTION | TEXT ONLY

Mid-Year Discussion

Supervisor must assess and document performance and expectations to date and meet with employee to review. Please include progress on goals, competencies and needed areas of improvement. Update the goal dashboard to reflect progress before submitting.

Mid-Year Discussion no comment

To enter comments, click into the Mid-Year Discussion section of the evaluation as outlined in red above. Include comments regarding the employee's progress on goals, performance, and needed areas of improvement should there be any. Any journal entries you have logged relative to your direct reports throughout the evaluation period will be accessible, and can be added into the comment box by clicking on Add to Comment Box.

COMPETENCY SECTION Mid-Year Discussion Done

Mid-Year Discussion

Supervisor must assess and document performance and expectations to date and meet with employee to review.

Please include progress on goals, competencies and needed areas of improvement.

Update the goal dashboard to reflect progress before submitting.

COMMENTS Required

B I U [List of icons]

Journal Entries 9 entries

THU OCT 17, 2019 09:22 AM | YOLANDA YOUNG

Zachary attended one day of the Arizona SHRM State Conference to keep up to date on changing laws, trends, employee engagement, etc. that impact Human Resources. Zachary's attendance also helps him obtain needed recertification credits towards his SHRM-CP and PHR certifications.

Add to Comment Box

THU OCT 17, 2019 09:14 AM | YOLANDA YOUNG

Zachary has completed preliminary work of the Prop 206 minimum wage increases required by 01/01/2020. Several options will be provided to the affected department to assist in the determination of impact on the department budget.

Add to Comment Box

THU OCT 17, 2019 09:11 AM | YOLANDA YOUNG

Zachary successfully developed the benchmark survey that consisted of 60 job titles. The survey was distributed to the 11 benchmark organizations with a requested completion date of October 15, 2019. Two organizations replied that they would be unable to complete the survey; Zachary will need to complete the matches on be

show more

Add to Comment Box

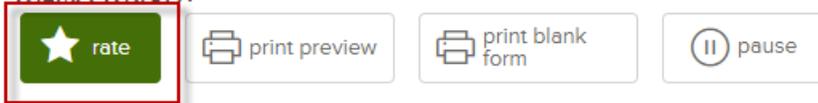
You may also access the Mid-Year Discussion form by clicking on the hyperlink under the Related To column.

Task	For Employee	Related To	Due Date
★ Rating For WILMA WRIGHT's Mid Year Discussion for WILMA WRIGHT (due 10/31/2019)	WILMA WRIGHT	Mid Year Discussion for WILMA WRIGHT (due 10/31/2019)	10/21/2019

Clicking on [Mid Year Discussion for WILMA WRIGHT \(due 10/31/2019\)](#) hyperlink takes you into the Mid-Year Discussion form where you will need to click on the green rate button.

Mid Year Discussion for WILMA WRIGHT (due 10/31/2019)

WILMA WRIGHT



Doing so will take you within the Mid-Year Discussion form where you must document your assessment of the employee's performance and expectations to date.

COMMENTS * Required

B *I* U

Zachary successfully developed the benchmark survey that consisted of 60 job titles. The survey was distributed to the 11 benchmark organizations with a requested completion date of October 15, 2019. Two organizations replied that they would be unable to complete the survey; Zachary will need to complete the matches on behalf of those organizations.

Zachary has completed preliminary work of the Prop 206 minimum wage increases required by 01/01/2020. Several options will be provided to the affected department to assist in the determination of impact on the department budget.

Zachary attended one day of the Arizona SHRM State Conference to keep up to date on changing laws, trends, employee engagement, etc. that impact Human Resources. Zachary's attendance also helps him obtain needed recertification credits towards his SHRM-CP and PHR certifications.

Zachary's role in the organization is that of an individual contributor (IC) which include the following role specific competencies: Job Knowledge, Accepting Direction and Responsibility, and Meeting Work Expectations. Zachary is also evaluated on the core competencies of Customer Focus, Results, and Teamwork. Zachary is meeting expectations on all competencies at this mid-year discussion. He is a solid contributor in the Human Resources Department as evidenced in his progress on this years goals.

Once you have added all the comments click **Done** at the top right of your screen.

Next click **Submit Evaluation**. You will then receive a message asking if you wish to continue. If you wish to make further comments, select cancel, otherwise select continue.

You're almost done!

By clicking certify and submit, you confirm that your rating is complete and accurate. Once your rating is submitted, you will no longer be able to make changes without administrator assistance.

YOLANDA YOUNG

Do you wish to continue?

Cancel

Continue

Upon selecting Continue, you will receive a message that the evaluation has been successfully submitted.

Success!



Your evaluation for **ZACHARY ZUBOV** has been submitted.

Close

As a final notice of your successful completion of the mid-year review, you will receive a system generated email; see example below.



Dear YOLANDA YOUNG,

The status of [Mid Year Discussion for ZACHARY ZUBOV \(due 10/31/2019\)](#) for ZACHARY ZUBOV is now Completed.

Employee: ZACHARY ZUBOV
Due Date: 10/31/2019