PERFORMANCE EVALUATION GUIDE FOR NEOED

Staff and Management

Table of Contents

Overview

Perform is a component of NeoEd that contains and manages all the performance evaluations and development plans (performance improvement plans) for district employees. You may use your LancerPoint credentials to access your NeoEd profile https://pasadena.edu/hr/neoed.php.

Except for adjunct (part-time) faculty and unclassified hourlies, all evaluations will be created automatically. The below table provides more information about the creation of evaluations.

Evaluation Program	Timeline	Probationary	Annual
CFT & Confidentials	Create Date	30 days before due date	June 1
	First Task	15 days before due date	
	Due Date	60 & 150 days after position start date	August 1
CSEA & POA	Create Date	30 days before due date	June 1
	First Task	15 days before due date	
	Due Date	90 & 180 days after position start date	August 1
Management (requiring colleague feedback)	Create Date	N/A	July 1
	First Task	September 10th – launch colleague feedback survey	
	Due Date	N/A	December 1
Management (no colleague feedback)	Create Date	N/A	July 1
	First Task	August 1st – self-evaluation due	
	Due Date	N/A	December 1

Evaluations are created in advance of the due date so that supervisors can begin the process of completing the evaluation. The system allows for starting and stopping while automatically saving the progress completed thus far.

You may also create ad-hoc evaluations as needed. (Reference: CFT Article 16.5, CSEA Article 7.2)

Completing An Evaluation

- Once the system has created an evaluation you'll be able to access it via the **Performance** link on the left side of your Dashboard once you login into NeoEd.
- From here you can click the **Performance Evaluation List** in the Perform Links menu.
- Click on the name of the evaluation located in the farthest left column for the employee you wish to evaluate.
- Click on the green **Rate** button this screen to begin the evaluation (rating) of the employee you selected. As stated previously, the system will automatically save progress if you need to start and stop the evaluation.
- On the left side of the screen will be the sections of the evaluation. You may move around the sections and complete them in any order.

- Begin the evaluation by rating each of the performance factors. Not applicable may only be used for criteria indicated as "if applicable".
  - Required Comments. If the rating is any of the below, comments are required in the comment box. The system will not allow submission of the evaluation until comments have been entered.
    - Needs Improvement or Unsatisfactory (CFT & Confidentials)
    - Exceeds Expectations or Needs Improvement (CSEA)
    - Needs Improvement or Outstanding (POA)
- At any time, you may click on the **Print Current State** button (turn off your browser pop-up blocker) at the top right of the Summary section to print out a preview of the evaluation. To return back to the evaluation click on **Go To Evaluation Details**.
- After you have met with the employee click on the green **Go to Task** button in the evaluation screen and indicate the date you met with the employee. Once this step is done the completed evaluation will be visible in their NeoEd account.
- Signing the evaluation. After completing the previous task the button will change to **Approve and Sign.** From here you can either click **Approve & Sign** or **Deny**. If you need to make changes, click **Deny**. It will allow you to go back into the evaluation to make edits.
- Employee Signature. After your signature the employee will have a task to sign or refuse to sign. In both instances they can enter comments.

Revisions

Managers may revise their ratings, comments, and additional rater remarks. To do so, the manager would click on "Approve & Sign" and then click "Deny" on the next screen (a comment is required). Once this step occurs, the green "Rate" button appears again and the evaluation can be revised. Alternatively, Human Resources can unlock the step so that the manager can make revisions.

Journal Entries

- Journal entries are notes you may record about any employee reporting to you or in your hierarchy.
- Can be added to the employee's profile using the following methods:
  - From your Dashboard, using the 'Write a Journal entry' link in Quick Actions
  - Navigating to your Journal Hub in Performance and adding it
  - From the employee's profile adding it by clicking the 'Journal Entries' button
  - By emailing 'journals@neoed.com', listing, in the subject line, the exact spelling of the employee's name (First and Last only) in NeoEd and typing the journal entry in the body of the email. Add "end journal" to the end of the email and before your signature line to exclude your signature block from the journal entry. If the name is not spelled correctly in the subject line of the email, the journal entry will appear in the Pending section of your Journal Hub where you can make corrections to the name, edit it, or delete it.
- All journal entries associated with the employee will appear while you're completing the performance evaluation.
- One attachment may be added to a journal entry.
- Can edit and delete your journal entries.

- Can select whom to share the journal entry with. If you share a journal entry the system will automatically send them an email with a direct link to the journal entry.
- While completing an evaluation you can add the journal entry or entries to the comment box by clicking the **Add to Comment Box** hyperlink in the journal entry.

Reviewer Entries

Reviewer entries are past evaluation ratings and comments that were completed within NeoEd. While completing the performance evaluation the past ratings for each criteria will appear on the right side of the screen. It will indicate who the rater was, the evaluation date, the rating, and any comments made for that criteria. These will appear after the first evaluation has been completed within the NeoEd platform.

Self-Evaluation

If an employee is completing a self-evaluation, the supervisor will be able to view the submitted self-evaluation narrative in the reviewer entry panel.

Job Description

For non-faculty evaluations only, there will be a link near the top right in the ratings screen which will open the employee's job description inside the ratings screen. While completing the evaluation you may refer to the employee's job description.

Development Plans (Performance Improvement Plans)

Development Plans, commonly referred to as Performance Improvement Plans, will automatically be created when any CFT or Confidential competency or overall rating is rated as a "Needs Improvement" or "Unsatisfactory" and when any CSEA or POA competency or overall rating is rated as "Needs Improvement".

The supervisor will receive notification and task assignments to build the development plan based on the deficient competency and/or overall rating. Once built, the plan shall be reviewed with the employee who will be assigned tasks to complete in order to improve performance in the areas noted on the Development Plan.

Evaluation Steps

CFT
1. Manager's Ratings and Remarks
2. Meet with Employee
3. Release Evaluation to Employee
4. Manager's Signature
5. Employee's Signature

CSEA
1. Manager's Ratings and Remarks
2. Meet with Employee
3. Manager's Signature
4. Manager's Manager Signature
5. Release Evaluation to Employee

6. Employee's Signature

POA

1. Manager's Ratings and Remarks
2. Manager Task – Indicate length of supervision of employee
3. Manager's Signature
4. Manager's Manager Signature
5. Meet with Employee
6. Release Evaluation to Employee
7. Employee's Signature

Management (requiring colleague feedback)

1. Employee and Manager finalize list of persons for colleague feedback (10 for classified and 20 for academic)
2. Manager launches survey with names from previous step
3. Employee completes self-rating
4. Manager's Ratings and Remarks
5. Manager's manager reviews and signs the evaluation
6. Meet with Employee
7. Release Evaluation to Employee
8. Manager's Signature
9. Employee's Signature

Management (no colleague feedback)

1. Employee completes self-rating
2. Manager's Ratings and Remarks
3. Manager's manager reviews and signs the evaluation
4. Meet with Employee
5. Release Evaluation to Employee
6. Manager's Signature
7. Employee's Signature

Notifications

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

Tasks: When you are logged into your Dashboard, the system will notify you of any tasks requiring your attention. These will appear in the My Tasks section. You may also access Tasks via the Tasks menu item located on the left side of the Dashboard screen.

Viewing Evaluations

Managers can access all the evaluations of everyone within their hierarchy.

Navigate to the employee's profile by clicking on the **Performance** link from your Dashboard and then click the **Performance Evaluation List** hyperlink. Click on the **Employees** link in the menu, select the employee's profile you'd like to access and click **Evaluations**. '
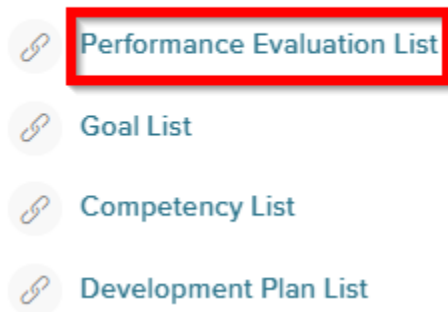
Step-By-Step Guide

1. From your Dashboard click on **Performance**
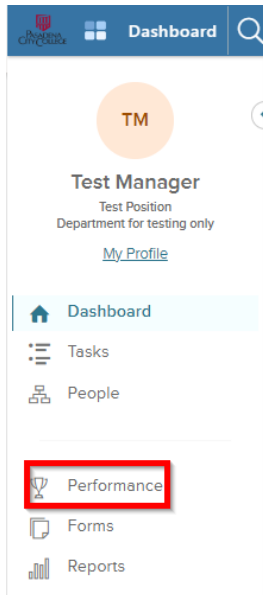
2. From your Performance screen click **Performance Evaluation List**

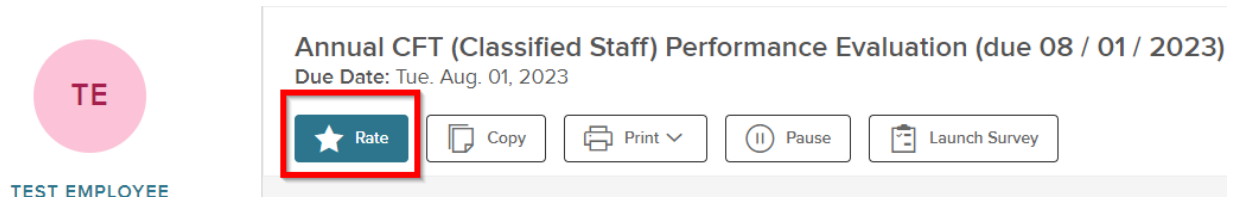3. If using the Performance Evaluation List link click on the evaluation from the list you would like to access

4. Click the green **Rate** button.
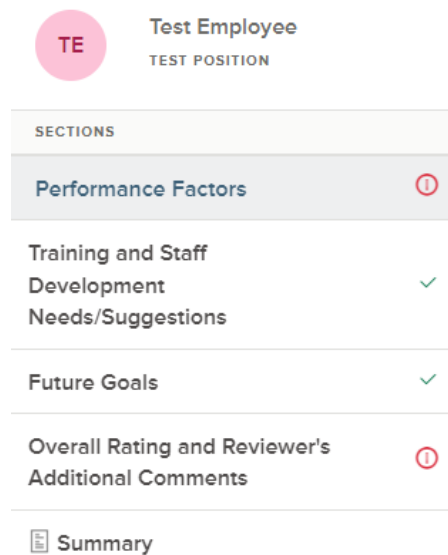

5. Begin completing the evaluation by clicking on the sections you would like to start with. By default, the performance factors section will appear on the screen first.

6. Click on **Print Current State** (turn off your browser pop-up blocker) to print the evaluation at any point through the evaluation process.
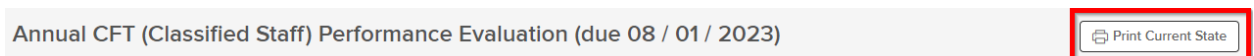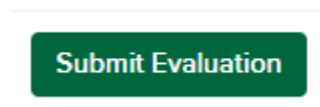

Figure 1 Print Current State

7. Click the green Submit Evaluation button to complete the evaluation.

8. After you have had the evaluation meeting with your employee, click on the green **Go to Task** button and indicate the date you met with the employee and click submit. This will release the evaluation to the employee's NeoEd profile.

Annual CFT (Classified Staff) Performance Evaluation (due 08 / 01 / 2023)
Due Date: Tue. Aug. 01, 2023

| ☑ Go to Task | 🗐 Copy | 🖨 Print ∨ | ⏸ Pause | 🗒 Launch Survey |

9. You're now ready to sign the evaluation. Click the green **Approve & Sign** button.

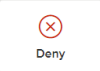## Annual CFT (Classified Staff) Performance Evaluation (due 08 / 01 / 2023)
Due Date: Tue. Aug. 01, 2023

| ☑ Approve & Sign | 🗐 Copy | 🖨 Print ∨ | ⏸ Pause | 🗒 Launch Survey |

10. You may click **Approve & Sign** or **Deny**. If you click Deny you may go back into the evaluation to make edits and submit it again at which point you may Approve & Sign. The evaluation will be sent to the employee for their signature.

Approval Form   Go to Evaluation Details ⟩

| TE | **Test Employee**
Test Position | EVALUATION NAME
Annual CFT (Classified Staff) Performance Evaluation (due 08 / 01 / 2023) | DUE DATE
Tue. Aug. 01, 2023 | ☑ Approve & Sign | ⊗ Deny |