NEOED PERFORM:
Staff Evaluation Guide

The intent of this guide is to assist employees in the process of carrying out the evaluation.

As you carry out the evaluation, please visit the [Perform webpage](#) on the HR website for additional information and resources or contact employment@andrews.edu if you have any questions.
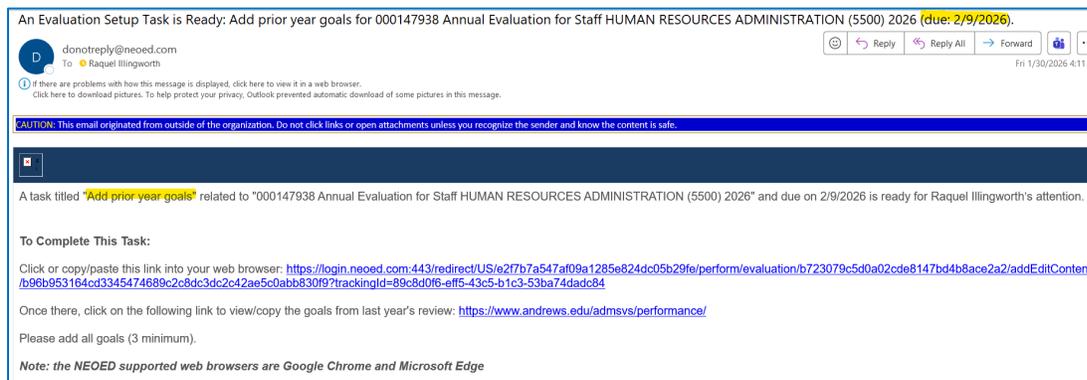
Due Dates

Annual Evaluation: March 31st

- 35 days before Evaluation Due Date: Employee & Direct Reports Evaluation
- 21 days before Evaluation Due Date: Supervisor (Manager) Evaluation
- 14 days before Evaluation Due Date: Next Level Supervisor (Manager's Manager) Approval & Signature
- 7 days before Evaluation Due Date: Supervisor (Manager) Approval & Signature
- Evaluation Due Date: Employee Signature

The exact dates can be viewed under the **Process** tab in the evaluation

Creation of the Evaluation

Once the system creates the evaluation, whether it is the initial review or the annual review, the supervisor will have received an email notifying them that your evaluation has been created. At the same time, you will have received an email notification from donotreply@neoed.com to complete your self-evaluation, specifying the evaluation due date. This will generally be the first task of the evaluation. However, this first year of implementation you will need to enter your previous year's goals first.

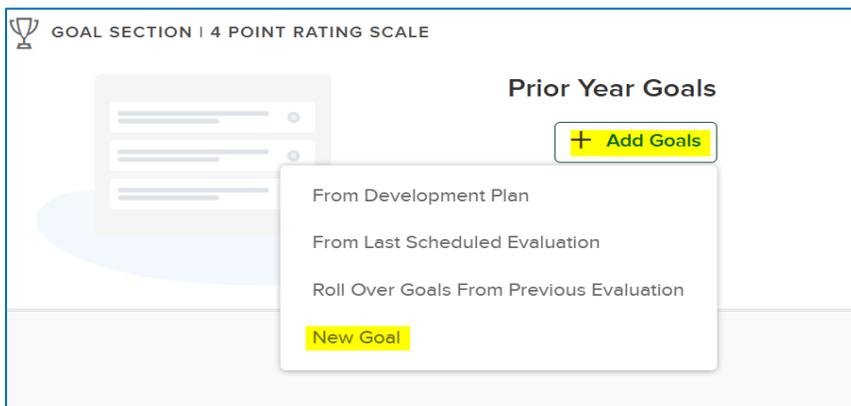Click on the first link to go to the evaluation
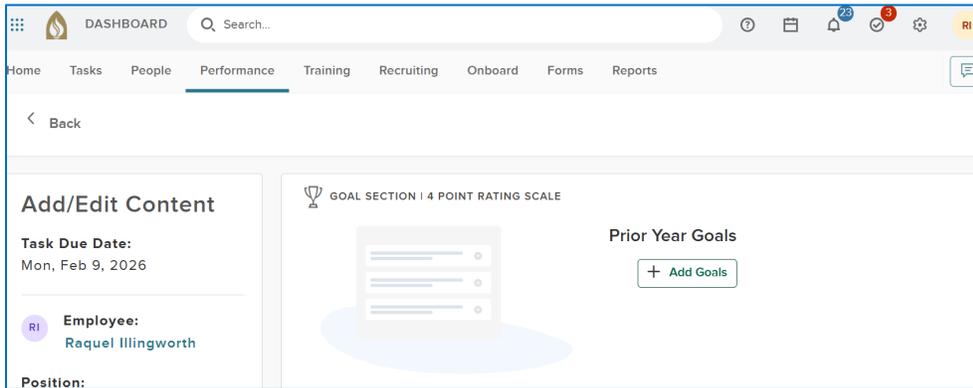
The second link will take you to the previous evaluation system. Look for the evaluation from last year and click on "view" to access the information.

Locate and copy the Future-Focused goals from here into the new one

Go to NEOED perform and click on **Add Goals** then select **New Goal**

Enter the goal name, copy the description from the old system, and paste it into the new system under the description. Select the category and click save and Add Another to add the next goal until all goals have been transferred. Click Save when you have transferred the last goal:

Your goals will be visible under the Prior Years' Goal section

Click on submit content to continue with your evaluation. This option will appear at the bottom of the left side of the evaluation:

You will receive a new email in your mailbox that will direct you to the evaluation system to complete your evaluation.
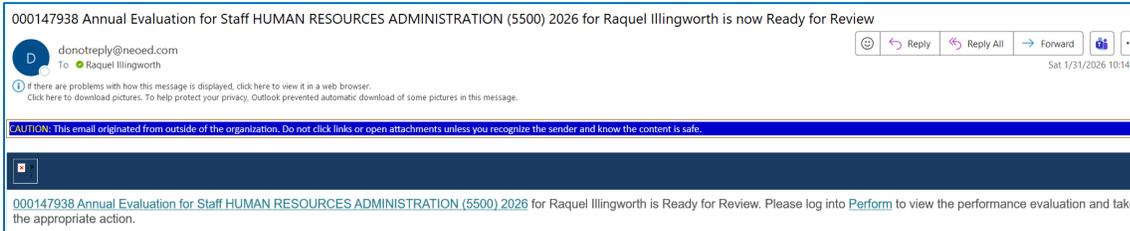
There are 2 links, the first one that contains your ID will direct you to the page where you can begin your self-rating.

The second link will direct you to the Perform Dashboard, where you can view your tasks and enter information for your journal entries. You will also find the link to start your current evaluation there:

Click on Rate to start rating yourself and add comments as necessary or use the writing assistance option available. Please note that there is a required comment if you select the options "Does Not Meet Expectations, Needs Improvement, and Exceeds Expectations".

Complete the 5 items under Competencies:

Once you have provided an answer for the 5 items, click on Next Section to continue

You can now see the previously entered Prior Years' Goals. Please enter a rating for each evaluation listed.
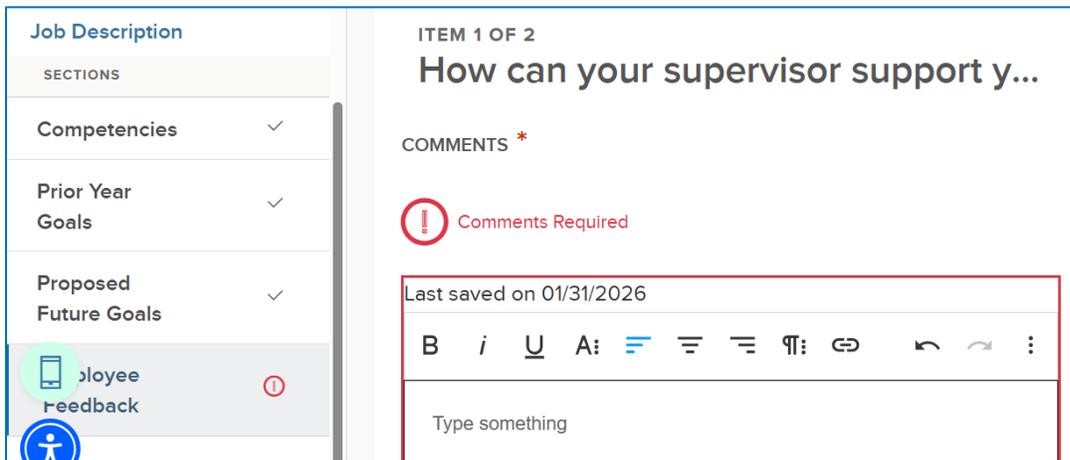
Click "Next Section" to enter the Proposed Future goals for review with your supervisor.
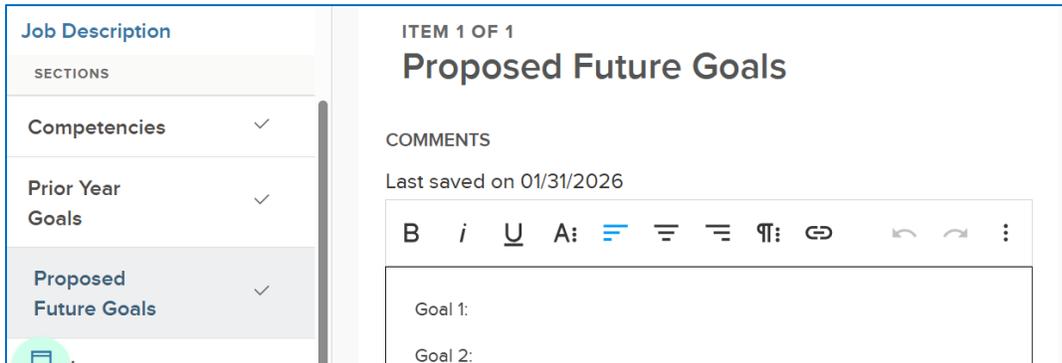

Click on Next Section to complete the Employee Feedback section. You will be required to enter a comment on the two items listed under this section. The system will not allow you to go to the next step until this section is completed:


You can also click on the Summary section to review the completed parts before submitting your evaluation.
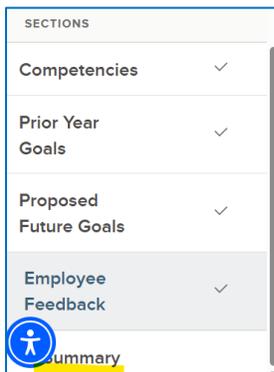
You will now see that all sections have a check mark, and the evaluation can be submitted.
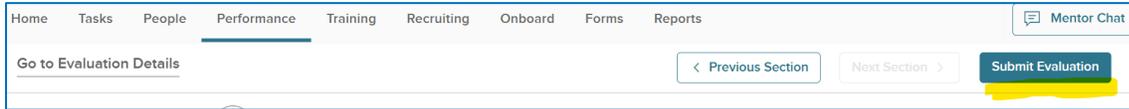
Click on "Submit evaluation" and then select "Continue" to finalize your evaluation rating. Once your rating is submitted, you cannot make any changes. Your supervisor will receive an email with instructions to continue with the process.
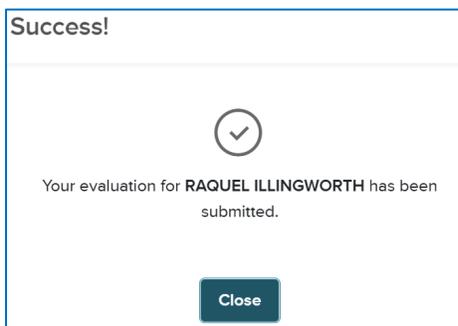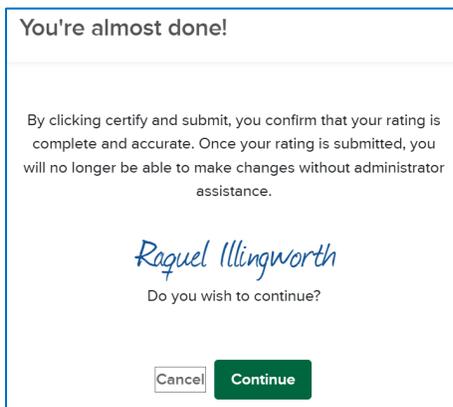
Your Next Level Supervisor (Manager's Manager) will be the first one prompted to approve and sign your evaluation. After they sign, your Supervisor (Manager) will need to approve and sign. Once both signatures are obtained, you will receive notification to sign your evaluation. At that time, you will be given the opportunity to provide one final feedback on your evaluation before signing.