

## Performance Process in Detail with Resources

| Timeline             | Supervisor Actions                                                                                                                                                                                                                                                                                                                                                    | Employee Actions                                                                                                                                                                                                                                                                                                                                                                               | Resources<br>(not required but useful) - Can be found in NeoEd or <a href="#">Here</a>                                                                                                                                    |
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| August/September     | <p>Host collaborative conversation with employee addressing goal setting and clarifying expectations.</p> <p>*Recommended- prior to conversation assign employee SMART Goal Setting Worksheet and Clarity &amp; Initial Priorities Check-In resource.</p> <p>After employee enters goals in NeoEd, approve goals and add any additional notes in a Journal Entry.</p> | <p>Complete Clarity &amp; Initial Check-in and SMART Goal Setting Worksheets prior to initial check-in with supervisor.</p> <p>Attend collaborative conversation with supervisor addressing goal setting. Ask questions, learn expectations, and share any potential barriers.</p> <p>Click on "Add Content" to enter goals in NeoEd. Once entered, review goals and hit "Submit Content".</p> | <p><a href="#">Clarity &amp; Initial Priorities Check-In</a></p> <p><a href="#">SMART Goal Setting Worksheet</a></p> <p><a href="#">How to Document Employee Goals</a></p> <p><a href="#">How to Affirm Set Goals</a></p> |
| September - December | <p>Schedule and conduct regular informal check-ins (weekly, bi-weekly, monthly, etc.) with employee focusing on progress towards goals, roadblocks, learning, recognition, or course correction.</p> <p>Document notes in NeoEd using Journal Entry/Check-in. Use</p>                                                                                                 | <p>Attend regular scheduled informal check-ins with supervisor. Ask for feedback on goal progression, course correction, or learning. Share roadblocks and achievements.</p> <p>Can view supervisor Journal entries by looking at your Journal</p>                                                                                                                                             | <p><a href="#">Check-In Questions</a></p> <p><a href="#">How to Ask for Feedback</a></p> <p><a href="#">How to Document Check-In</a></p> <p>How to Enter Journal Entries &amp; Share (optional)</p>                       |

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|                | right-hand navigation to view employee Journal Entries and Eval Content to review set goals. Can be used as reference during documentation.                                                                                                                                                                                                                                                                       | Hub in Performance in NeoEd.<br>Review check-in notes and comments from supervisor by going to Performance, click on active evaluation, then Eval Process, click the three dots (...) on the check-in you want to view, and click View. You can also view check-in comments by clicking print preview for evaluation. | additional documentation)<br><ul style="list-style-type: none"> <li>- <a href="#">Employee</a></li> <li>- <a href="#">Supervisor</a></li> </ul> <a href="#">How to View Journal Entries</a><br><br><a href="#">How to View Check-in Notes from Supervisor</a>                                                                                                             |
| January        | <p>Schedule and conduct mid-year review for employee. Meeting should focus on reviewing employee goals, recalibrating if needed, celebrating their progress, and identify areas for improvement.</p> <p>Document notes in NeoEd using Journal Entry/Check-in. Use right-hand navigation to view employee Journal Entries and Eval Content to review set goals. Can be used as reference during documentation.</p> | <p>Attend mid-year review meeting. Self-reflect on progression towards goals prior to meeting. Ask for feedback.</p> <p>Can view supervisor Journal entries by looking at your Journal Hub in Performance in NeoEd. Can also review check-in comments/notes from supervisor.</p>                                      | <a href="#">Check-in Questions</a><br><br><a href="#">Self-Reflection Prompts</a><br><br><p>How to Enter Journal Entries &amp; Share</p> <ul style="list-style-type: none"> <li>- <a href="#">Employee</a></li> <li>- <a href="#">Supervisor</a></li> </ul> <a href="#">How to View Journal Entries</a><br><br><a href="#">How to View Check-in Notes from Supervisor</a> |
| February – May | Schedule and conduct regular informal check-ins (weekly, bi-weekly, or monthly) with employee focusing on progress towards goals, roadblocks, learning, recognition, or course correction.                                                                                                                                                                                                                        | Attend regular scheduled informal check-ins with supervisor. Ask for feedback on goal progression, course correction, or learning. Share roadblocks and achievements.                                                                                                                                                 | <a href="#">Check-in Questions</a><br><br><a href="#">How to Ask for Feedback</a><br><br><p>How to Enter Journal Entries &amp; Share</p>                                                                                                                                                                                                                                  |

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|          | Document notes in NeoEd using Journal Entry/Check-in. Use right-hand navigation to view employee Journal Entries and Eval Content to review set goals. Can be used as reference during documentation.                                                                                                                                                                                                                                                                                                                                                                                                                                            | Can view supervisor Journal entries by looking at your Journal Hub in Performance in NeoEd. Can also review check-in comments/notes from supervisor.                                                                                                                                                                                                                                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>- <a href="#">Employee</a></li> <li>- <a href="#">Supervisor</a></li> </ul> <a href="#">How to View Journal Entries</a><br><br><a href="#">How to View Check-in Notes from Supervisor</a>                                                                                                                                                                                                                                                                                                              |
| May/June | <p>Schedule and conduct formal End of Year Reflection Check-In for employee. Document notes in NeoEd using End of Year Check-in.</p> <p>Review and discuss employee's self-reflection/assessment on goal outcomes, personal and professional growth, and future aspirations.</p> <p>Complete Performance process by providing end of year feedback and category for goals.</p> <ul style="list-style-type: none"> <li>- Use right-hand side tool during ratings to view employee self-rating (Reviewer Rating) for each goal along with any comments. Can also utilize any journal entries made by you or employee for justification.</li> </ul> | <p>Attend formal end of year reflection with supervisor. Share reflections on goal outcomes, personal and professional growth, and future aspirations.</p> <p>Conduct self-reflection and self-assessment in NeoEd. Use right-hand navigation to view self-authored journal entries and any entries from supervisor. Can be utilized in self-assessment as additional comments and justification on self-reflection.</p> <p>Electronically sign in NeoEd to affirm supervisor categories chosen for each goal to complete the performance process.</p> | <a href="#">Self-Reflection Prompts</a><br><br><a href="#">Feedback Reflection Tool – Goal Categories</a><br><br><a href="#">End of Year Reflection Facilitation Guide</a><br><br><a href="#">How to Document End of Year Reflection Check-In</a><br><br><a href="#">How to Complete Self-Rating</a><br><br><a href="#">How to Complete Rating for Employee</a><br><br><p>How to Review &amp; Sign to Complete Process</p> <ul style="list-style-type: none"> <li>- <a href="#">Employee</a></li> <li>- <a href="#">Supervisor</a></li> </ul> |

**Additional Resources –**

- [Clarification of Expectations Plan & Progress Template](#) – To be utilized when there is a gap in understanding of responsibilities and expectations for role or to establish new responsibilities within a role. This resource should be used as a communication tool between employee and supervisor and provide clarity of expectations.