Performance Process in Detail with Resources

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

	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. 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) - Employee - Supervisor How to View Check-in Notes from Supervisor
January	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. 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.	Attend mid-year review meeting. Self-reflect on progression towards goals prior to meeting. Ask for feedback. Can view supervisor Journal entries by looking at your Journal Hub in Performance in NeoEd. Can also review check-in comments/notes from supervisor.	Check-in Questions Self-Reflection Prompts How to Enter Journal Entries & Share - Employee - Supervisor How to View Check-in Notes from Supervisor
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.	Check-in Questions How to Ask for Feedback How to Enter Journal Entries & Share

	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.	- Employee - Supervisor How to View Check-in Notes from Supervisor
May/June	Schedule and conduct formal End of Year Reflection Check-In for employee. Document notes in NeoEd using the Rating section. Review and discuss employee's self-reflection/assessment on goal outcomes, personal and professional growth, and future aspirations. Complete Performance process by providing end of year feedback and category for goals. During rating, on the right hand side select the Resources tab to view and utilize any journal entries made by you or employee for justification.	Attend formal end of year reflection with supervisor. Share reflections on goal outcomes, personal and professional growth, and future aspirations. Under the Rating section conduct self-reflection and self-assessment in NeoEd. Use right-hand navigation under Resources 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.	Self-Reflection Prompts Feedback Reflection Tool – Goal Categories End of Year Reflection Facilitation Guide How to Complete Rating for Employee How to Complete Self-Rating

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.