



NEOED Performance Evaluation

Human Resources
4-3-2026

Please note that this process does not apply to Executive Cabinet members, Senior Cabinet members, and Academic Associate Dean level staff, who in keeping with past practice will be evaluated in a separate senior staff process.

The competencies and rating scales are unchanged.

Table of Contents

Table of Contents	3
Rating Scale	4
Performance Factors	4
Notifications	5
Logging into NEOED.....	5
Evaluation Process Steps.....	5
Manager Enters Employee Prior Year Goals	6
Employee Self-Rating	7
Manager Ratings (can be completed in conjunction with Employee Ratings).....	9
Meeting with employee to discuss evaluation	11

Rating Scale

Outstanding Performance

Performance Requirements were consistently achieved above expectations. Significant accomplishments were made in unexpected areas. A rating at this level requires that several specific examples of outstanding performance be provided.

Exceeds Expectations

Performance Requirements were achieved and sometimes were achieved above expectations and established standards. A rating at this level requires that specific examples be provided.

Successful Performance

Performance Requirements were successfully achieved.

Needs Improvement

Performance reflects a need for improvement. A rating at this level may require action in the form of coaching, skill development and feedback to support development. This category may apply to new employees, newly promoted or transferred employees, or employees who have assumed new responsibilities. *Performance Notes* are appropriate for documenting improvement needed and positive performance.

Unsatisfactory

Established Performance Requirements were not achieved and some Performance was below established standards. A rating at this level requires the completion of a Performance Development Plan.

Performance Factors

Job Knowledge

Commitment and Accountability

Communication

Motivation

Collaboration

Service Orientation

Adaptability

Inclusion

Self-Development

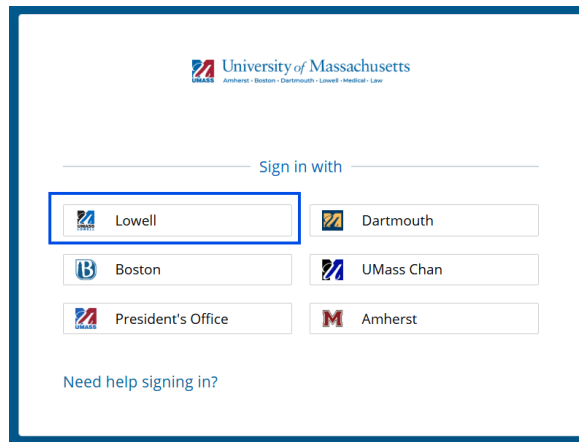
Notifications

An email will be sent to complete a task.

Click on the link in the email to be directed to the task.

Logging into NEOED

- Click the Hyperlink in the email you receive or use the following link [NeoEd Dashboard](#)
- You may be prompted to use single sign on (SSO) to sign in. Select “Lowell” when signing in.



Evaluation Process Steps

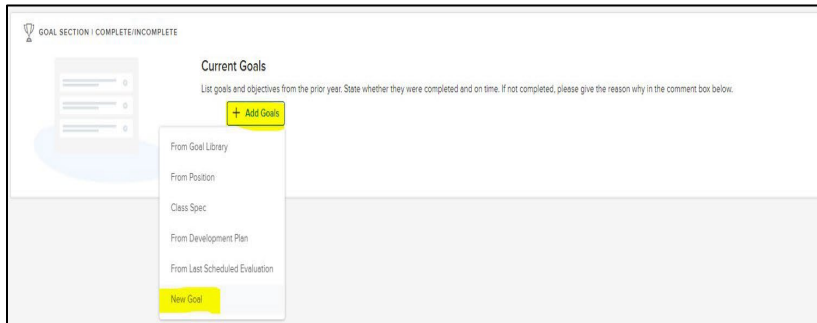
1. Manager enters previous year goals.
 2. Happens simultaneously:
 - a. Employee enters ratings to previous year goals, and enters self evaluation. (optional)
 - b. Manager enters ratings for employee.
 3. Manager approves and signs evaluation.
 4. Managers manager approves and signs evaluation.
 5. Manager and employee meet to discuss evaluation and manager releases the completed evaluation to the employee.
 6. Employee signs completed evaluation.
-

Manager Enters Employee Prior Year Goals

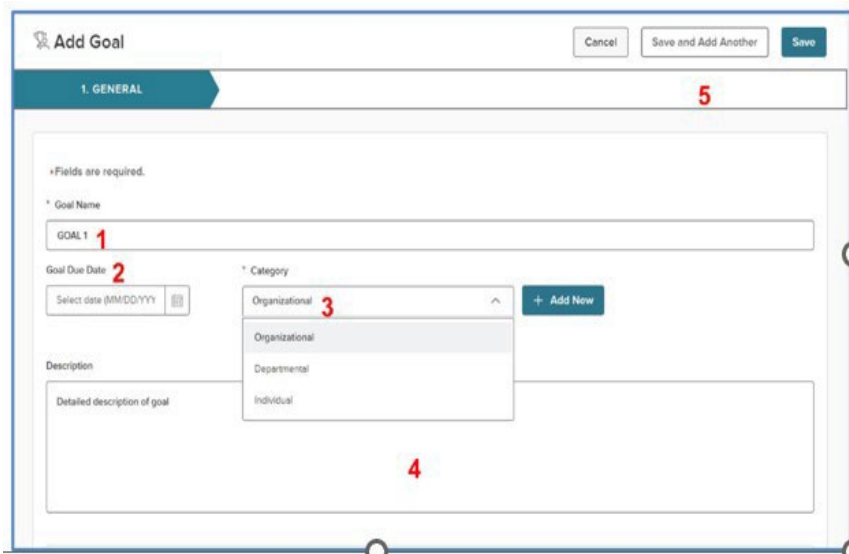
Managers should enter goals for performance period **April 1, 2025-March 31, 2026**. This section should be marked as not applicable if the employee has been with us less than a year and/or no goals were provided previously.

Entering goals for employee

Click **Add Goals** and choose **New Goal** from the dropdown.



This opens the Add Goal page.



- Enter the goal name (required)
- Select a due date (optional)
- Select a category (required)
- Enter the description (optional)

- Click **Save and Add Another** for additional goals
- When complete, click **Save**
- Once all content items have been added, click on the **Submit Content** button on the left side of your screen.

Add/Edit Content ✓ GOAL SECTION | NON-UNIT

Task Due Date:
Wed, Jul 17, 2024

UT: ~~Employee~~
UMD Test UMO Test

Position:
Test Position

Business Unit:
Department for testing only

Evaluation:
TEST ~~Evaluation~~ 7/17/24

Evaluation Due Date:
Wed, Jul 17, 2024

Submit Content

- To make changes, select **No Let's Go Back**
- Click **Yes, I'm Finished** if complete.

Submit Content

Are you sure you are finished with adding content for this evaluation?

Feedback from Previous Year's Goals: 0 Item(s) Added

No, Let's Go Back Yes, I'm Finished

The employee will receive an email that they may now do their self-evaluation.

Employee Self-Rating

The employee will receive an email that the goals have been entered; click on the link to access the goals. The employee will be able to provide feedback on the goals entered by the manager. Select a goal from the list. **This is optional.**

Lowell - Performance Planning & Evaluation Program April 1st - March 31st
Total Score **0.00 out of 0.00**

SECTIONS

Notes & Attachments

Prior Year's Goals

Self-Evaluation

Summary

Prior Year's Goals

GOAL SECTION | LOWELL RATING SCALE
Use this section to add previous year goals into the evaluation. Goals should be Specific, Measurable, Achievable, Relevant, and Time-bound.

* Fields are required.

ITEM 1 OF 3
DUE DATE: 06/29/2026
ITEM WEIGHT: 33.34%

Continue Learning SLATE for Transfer events and Trave

SLATE is the central program where the department tracks applications, communication and applicant interactions. Transfer admissions staff members continue to learn additional skills while using SLATE daily.

RATING SCALE *

- Unsatisfactory
- Need Improvement
- Successful
- Exceeds Expectations
- Outstanding Performance

COMMENTS

Employee Self-Rating on Goals

- Select a **Rating Scale**.
- Type any feedback into the **Comments** box, as needed.
- Note: The system auto saves all progress made so you may exit and resume at a later time.
- Click **Next** in the top right corner to move to the next item for rating.

Employee self-Evaluation

The employee will also have the ability to complete a self-evaluation. These are optional.

Lowell - Performance Planning & Evaluation Program April 1st - March 31st
Total Score **0.00 out of 0.00**

SECTIONS

Notes & Attachments

Prior Year's Goals

Self-Evaluation

Summary

Manager Ratings (can be completed in conjunction with Employee Ratings)

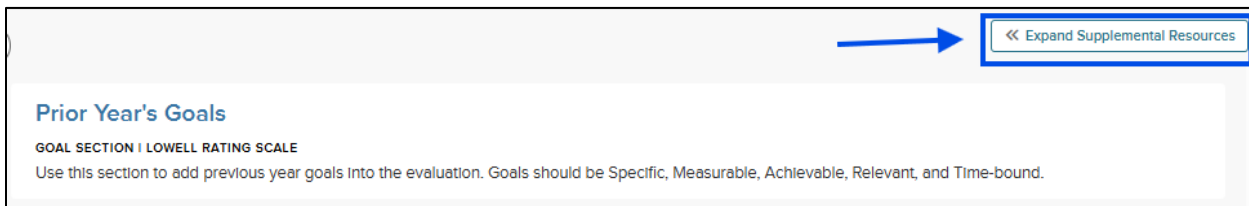
Work down the list on the left within the evaluation to complete the rating tasks. You will need to complete the following:

- Prior Year Goal Ratings (if applicable)
- Major Responsibilities
- Performance Factors
- Goal Setting
- Overall Rating

Tips and Tricks:

Prior Year Goals

If your employee has prior year goals and has documented to their prior year goals, you can see their feedback by **“Expanding Supplemental Resources”**.



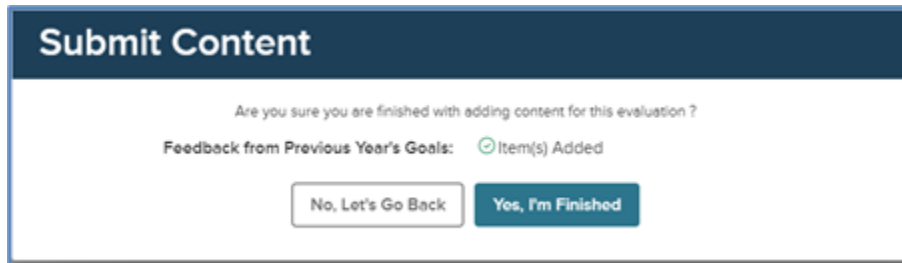
Goal Setting

List goals for the coming year that are consistent with the job description, are supportive of area objectives, and will enhance job performance. Using the following criteria (“SMART” goals) in setting effective goals is advised:

- **Specific:** Specific goals help the employee to better understand what is expected.
- **Measurable:** Measurable goals help the employee and supervisor to understand when the expected outcome is achieved.
- **Achievable:** Goals should be realistic.
- **Results-Oriented:** Goals should focus on desired results.
- **Time-Specific:** Goals should have deadlines, where applicable.

Once complete, click Submit Evaluation.

A message appears asking if you are finished adding content to the evaluation. If finished, click on **Yes, I'm Finished** or **No, Let's Go back** to add additional goals.



If you need to make edits, you should do so by clicking **No, Let's Go Back**.

When you click **Yes, I'm Finished**, the employee will be sent an email and will now be able to view what you have entered.

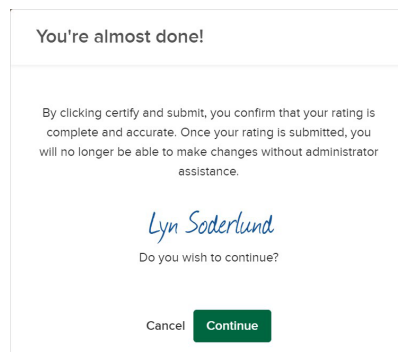
Manager's Signature

The manager will receive an email to sign the evaluation. If changes are to be made to what was previously entered, this is the opportunity to do so.



Use **Deny** to edit the evaluation. If **Deny** is chosen, the manager must enter in a comment. Choose **Deny** to make changes.

If the evaluation is complete, select **Approve & Sign**.



Manager's Manager Signature

The manager's manager will receive an email to sign the evaluation. If changes are to be made to what was previously entered, this is the opportunity to do so.

 UMD Test UMD Test Test Position	EVALUATION NAME TEST Evaluation 7/17/24	DUE DATE Wed. Jul. 17, 2024		
--	--	-----------------------------------	---	---

Use **Deny** to edit the evaluation. If **Deny** is chosen, the manager must enter in a comment. Choose **Deny** to make changes.

If the evaluation is complete, select **Approve & Sign**.

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.

Lyn Soderlund


Do you wish to continue?

Cancel

Meeting with employee to discuss evaluation

Click **Complete Task** to confirm this meeting has taken place.

Once the meeting is confirmed in the system, the manager's evaluation is released to the employee.



Task Detail Cancel Complete Task

Title
Meet with employee to discuss evaluation

Related to
TEST Evaluation 7/17/24

Due Date
07/12/2024

Description
Meet with the employee to discuss the final evaluation feedback. Add any relevant comments regarding the meeting (employee questions, comments, etc.) to the accompanying comment box for this task. Note that comments are public and will be visible to the employee and admin. Mark the task as complete once the meeting has concluded.

Comments

WARNING: Once SUBMIT is selected, no changes can be made. If the manager needs to edit, click Cancel to make edits.

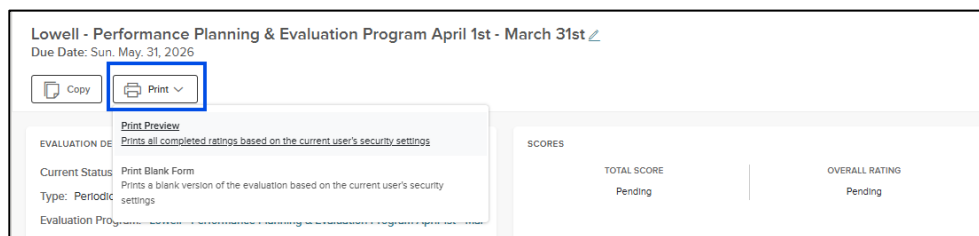
An administrator will NOT be able to make changes, contrary to this message.

Once the manager clicks **Submit**, no changes can be made, and the evaluation will route to the employee for signature. **Cancel** is the manager's last opportunity to make changes.

Viewing and printing an evaluation

It is recommended to use Chrome for this step if you are not already in Chrome.

To see what content was entered, select Print Preview.



Lowell - Performance Planning & Evaluation Program April 1st - March 31st [↗](#)
Due Date: Sun, May, 31, 2026

Copy Print Print Preview

Print Preview
Prints all completed ratings based on the current user's security settings

Print Blank Form
Prints a blank version of the evaluation based on the current user's security settings

Current Status
Type: Periodic

Evaluation Pro...

SCORES

TOTAL SCORE	OVERALL RATING
Pending	Pending

That will open a page. You may need to accept pop up blockers within your browser for the PDF to appear.

You can also click Print in the top right corner to have another window open with the content.

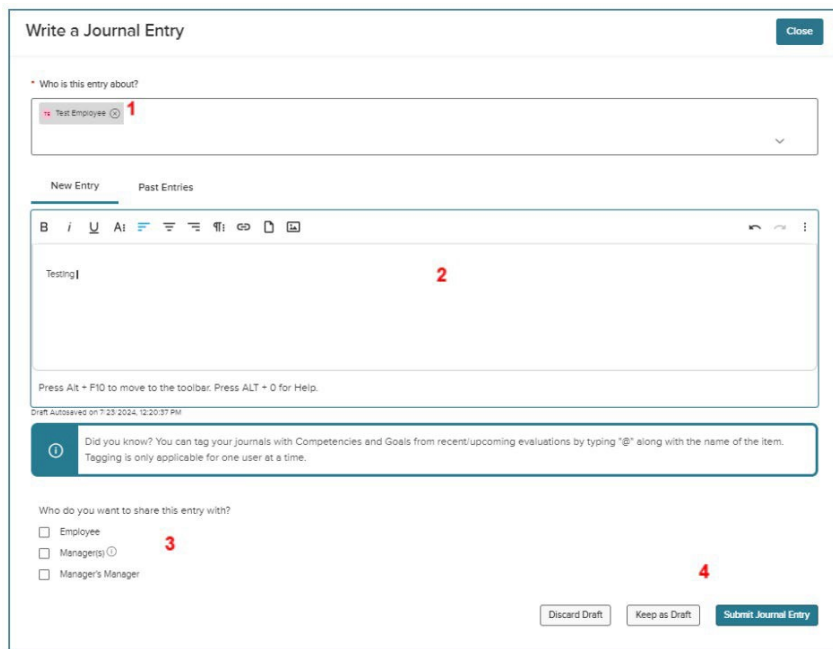
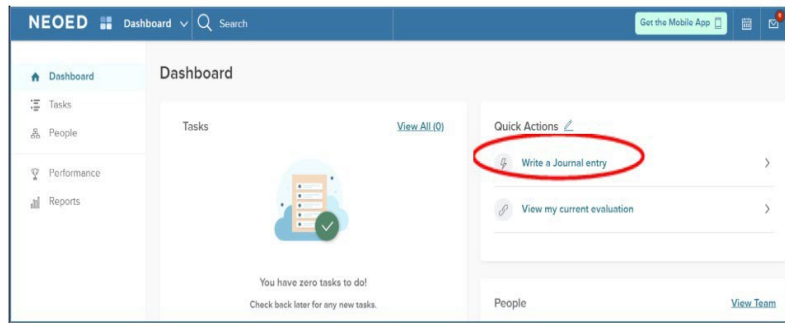


Journal entries

Journal Entries are an easy and effective way to take notes of accomplishments throughout the year for yourself and your direct reports.

There are several ways to log Journal Entries in Perform. They can be created from the **Dashboard** or from the **Journal Hub**.

You can create Journal Entries for your direct reports via the Quick Actions section on your **Dashboard**.



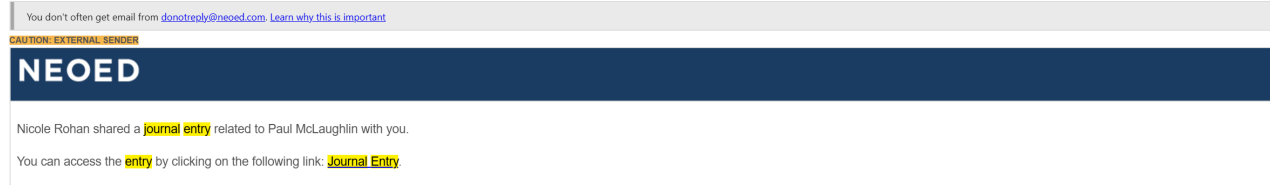
1. Enter the name(s) of the employee(s) for whom you would like to create a Journal Entry.
2. Add content. You can add one (1) attachment to each Journal Entry. To tag a Competency, Goal, or Narrative, enter '@' and type the desired competency, goal, or narrative. A list of matching items appears. Select the correct item. This assists in searching for this particular Journal Entry when rating. ePerform/NEOED continuously saves your work as a Draft while you type.
3. Select if you would like to share the entry with the Employee, their Manager(s), or their Direct Manager's Manager. Not selecting an option keeps the Journal private to the creator.
4. Choose whether to **Discard Draft**, **Keep as Draft**, or **Submit** your entry. To wipe all selections and text from your in-progress entry and start fresh, select **Discard Draft**. To keep your progress and finalize later, select **Keep as Draft**. Access any drafts from the Journal Hub to finalize. Once you

have added all comments, attachments, and tagged evaluation items, select **Submit Journal Entry**.

Viewing Journal Entries

You will receive an email for a journal entry shared with you. Click on the hyperlink to view the entry.

From: donotreply@neeed.com <donotreply@neeed.com>
Sent: Friday, January 24, 2025 1:21 PM
To: Paul F McLaughlin <Paul.McLaughlin@umb.edu>
Subject: Nicole Rohan shared a **journal entry** related to Paul McLaughlin with you



Another option to view is from the Dashboard. Click on Performance on the left side of your Dashboard, then choose the Journal Hub tab.

Dashboard

The Dashboard is the central landing page, where system tasks and records can be accessed.

1. **My Tasks:** Contains all tasks currently requiring your action.
2. **My Evaluations:** Displays your current performance evaluation.
3. **My Manager:** Displays your manager.
4. **My Direct Reports:** All of your Direct Report(s).

