



# ePerformance User Guide for Non-Unit Staff

January 2026

*This guide is intended to assist in the completion of the non-unit staff evaluation process. Please note that this process does not apply to Vice Chancellor and Dean level employees, who in keeping with past practice will be evaluated in a separate senior staff process.*

*The competencies and rating scales are unchanged.*

## Rating scale

- **Exceeds Expectations (EE)** Performance frequently exceeds the normal standards for a person qualified to fully perform the duties of this position in a professional and competent manner.
- **Meets Expectations (ME)** Performance is completely satisfactory. The performance consistently and completely meets the normal standards for a person qualified to fully perform the duties of this position in a professional and competent manner.
- **Needs Improvement (NI)** Performance does not fully meet the normal expectations or is inconsistent for a person qualified to perform in the position. While this performance may not yet be a significant problem, immediate corrective action is necessary.
- **Not applicable NA** Does not apply

# Competencies

For all:

- Job Knowledge
- Quantity/Quality of work
- Professionalism/Integrity
- Initiative/Motivation
- Dependability
- Teamwork
- Customer Service
- Interpersonal/Communication Skills
- Analytical Ability

For those who manage other staff members:

- Leadership Skills
- Performance Management

## Notifications

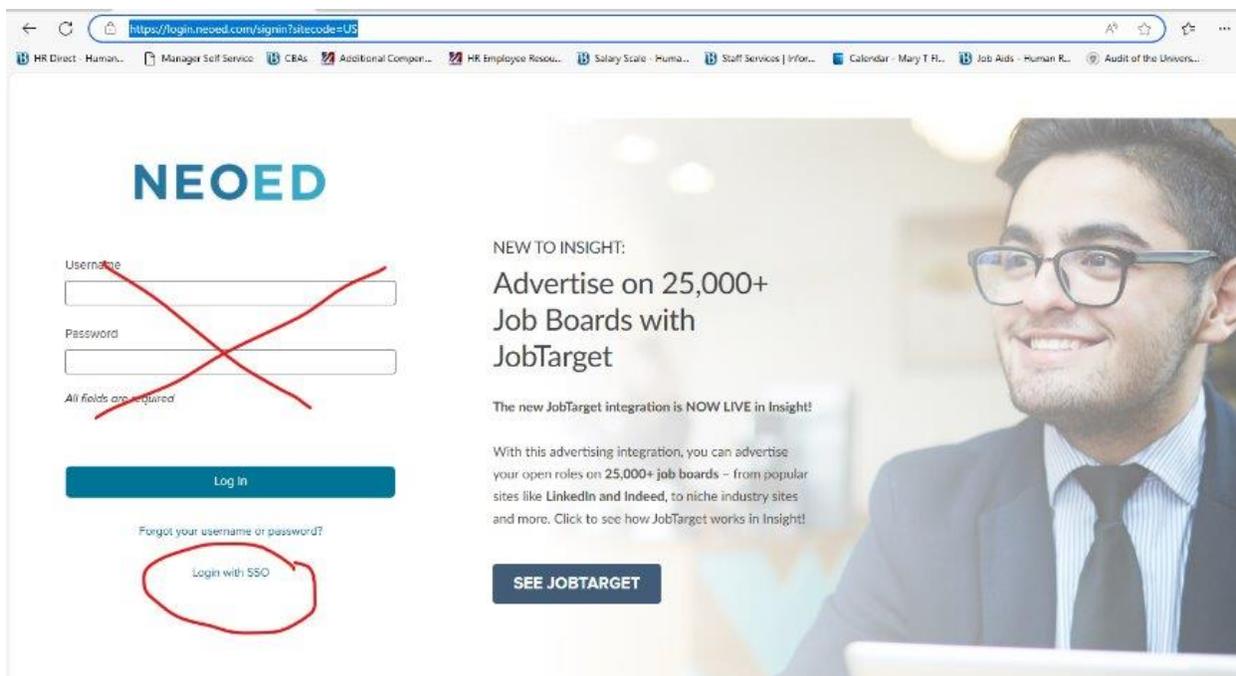
An email will be sent to complete a task.

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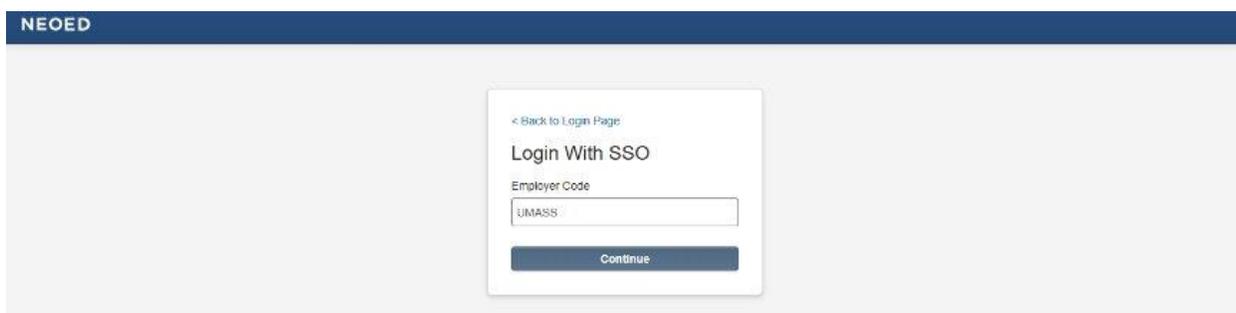
Click on the link in the email to be directed to the task.

# Logging into to NEOED

<https://login.neoed.com/signin?sitecode=US>



Single sign on (SSO) for this platform so you do not need to sign in. If you get the above, input UMASS for Employer Code.



## **Evaluation process steps**

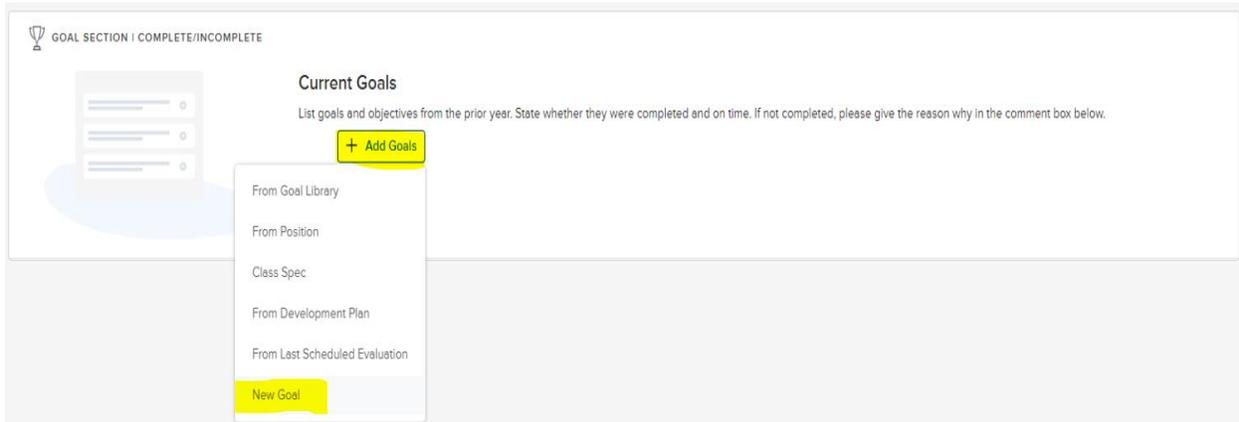
- Manager may need to enter employee goals for last cycle if the employee is a new employee for the past year, or if no goals were entered for last review
- Employee self-rating on goals and competencies
- Manager rating on employee goals and competencies for last cycle
- Manager adds future goals for next evaluation period
- Manager and employee meet to discuss
- Evaluation sent to employee
- Manager signs the evaluation
- Employee signs the evaluation

## Manager enters employee goals for 2025

This section should be marked as not applicable if the employee has been with UMass Boston less than a year and/or no goals were provided previously. Later in the process, managers will add 2025 ratings and 2026 goals.

## Entering goals for employee

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



This opens the Add Goal page.

The screenshot shows the 'Add Goal' form with the following elements and callouts:

- 1**: Text input field for 'Goal Name' containing 'GOAL 1'.
- 2**: Date picker for 'Goal Due Date'.
- 3**: Dropdown menu for 'Category' with 'Organizational' selected.
- 4**: Text area for 'Description' containing 'Detailed description of goal'.
- 5**: 'Save and Add Another' button in the top right corner.

Other visible elements include the 'Add Goal' title, 'Cancel', 'Save', and '+ Add New' buttons.

- 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**

Click **Save and Add Another** in the upper right for additional goals. When all goals have been entered, click **Save** in upper right.

Once all content items have been added, click on the Submit Content button on the left side of your screen.

**Add/Edit Content** V GOAL SECTION / NON-UNIT

Task Duo Date:  
Wed, Jul 17, 2024

Items

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**

GOAL1

GOAL2

GOAL3

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:  Item(s) Added

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

Dear Paul McLaughlin,

A self-evaluation is now ready for your rating.

Click [here](#) to rate.

Employee: Paul McLaughlin

Evaluation: Test 2 Annual Boston Non Unit (due 03 / 31 / 2026)

Due Date: 3/31/2026

## Employee self-rating

The employee will receive an email that the goals have been entered; click on the link to access the 2025 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*.

Total Score 0.00 out of 0.00 (0.00%) | Overall Rating **Not Available** | [Submit Evaluation](#)

TEST Evaluation 7/17/24 | [Previous Section](#) | [Next Section](#)

GOAL SECTION | DARTMOUTH NON-UNIT SALARIED

### Feedback from Previous Year's Goals

GOAL 1	 no comment	<a href="#">&gt;</a>
GOAL 2	 no comment	<a href="#">&gt;</a>
GOAL 3	 no comment	<a href="#">&gt;</a>

## Employee self-rating on goals

The screenshot displays a web interface for 'Previous Year's Goals'. At the top, there is a blue header with a trophy icon, the text 'GOAL SECTION Previous Year's Goals', and navigation buttons: '< Previous', 'Next >', and 'Close'. The main content area is titled 'GOAL 1' and includes a note '\* Fields are required.' Below this, there are two main sections: 'RATING SCALE' and 'COMMENTS'. The 'RATING SCALE' section has a 'Show descriptions >' link and four radio button options: 'Exceeds Expectations (EE)', 'Meets Expectations (ME)', 'Needs Improvement (NI)', and 'Not applicable NA'. The 'Meets Expectations (ME)' option is selected. The 'COMMENTS' section features a rich text editor with a toolbar containing icons for bold (B), italic (i), underline (U), text color (A), background color, bulleted list, numbered list, link, and unlink. The text 'Job well done.' is entered in the comment box. A character count 'Characters : 14' is visible at the bottom right of the comment box. To the right of the main form, there is a sidebar with a search bar 'Search Feedback Entries', a 'Journal Entries' section showing '0 entries' and a 'Collapse' button, and filter dropdowns for 'Author: My...' and 'Date: Past ...'. Below the filters, it states 'No Journal Entries found.'

For 2025 goals and competencies:

- 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-rating on competencies

The employee will also have the ability to do a self-evaluation of the competencies. These are optional. The steps for rating are the same as the manager.

The screenshot shows a web interface for a competency section titled "Supervision and Leadership". The main content area is for "Leadership Skills - non-unit", which includes a description: "Provides appropriate leadership and support within the work environment. Successfully achieves results by planning, directing, influencing, motivating and informing others. Is a positive role model. Exemplifies University's principles, values and ethics for professional conduct." Below the description is a "RATING SCALE" section with four options: "Exceeds Expectations (EE)", "Meets Expectations (ME)", "Needs Improvement (NI)", and "Not applicable NA". The "Meets Expectations (ME)" option is selected, indicated by a green checkmark. To the right of the rating scale is a "COMMENTS" section with a text area containing the text "Job well done." and a character count of "Characters : 14". The interface also features a search bar for "Feedback Entries" and a "Journal Entries" section showing "0 entries" and "No Journal Entries found.".

When the employee completes and submits the self-rating, the manager will be able to view what the employee entered. If an employee does not complete, the evaluation will flow to the manager to complete the ratings. The manager will receive an email saying that this task needs to be completed.

The manager will not be able to change what the employee entered nor can an employee change what the manager entered.

The employee can do a self-evaluation as long as the manager has not signed and finalized the evaluation.

## Manager rating and feedback on goals and competencies

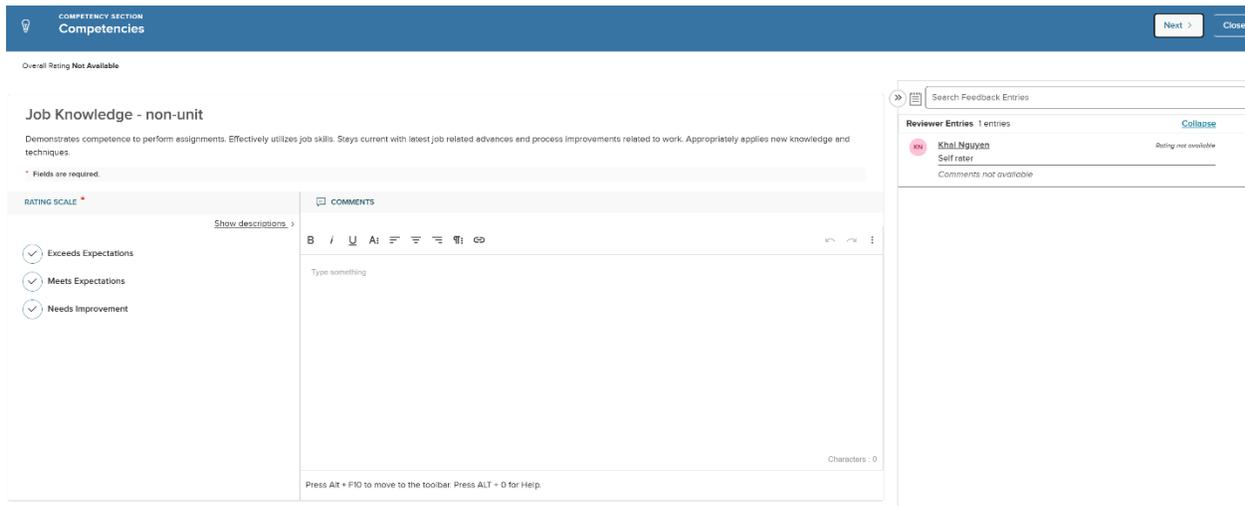
The screenshot displays a performance evaluation interface. At the top right, it shows 'Total Score 0.00 out of 0.00 (0.00%)', 'Overall Rating Not Available', and a 'Submit Evaluation' button. Below this, the section is titled 'TEST Evaluation 7/17/24' with navigation buttons for 'Previous Section' and 'Next Section'. The main content area is labeled 'GOAL SECTION | DARTMOUTH NON-UNIT SALARIED' and 'Feedback from Previous Year's Goals'. It contains three goal entries: 'GOAL 1', 'GOAL 2', and 'GOAL 3'. Each goal entry has a 'no comment' status and a right-pointing arrow.

For 2025 goals and competencies:

- 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.

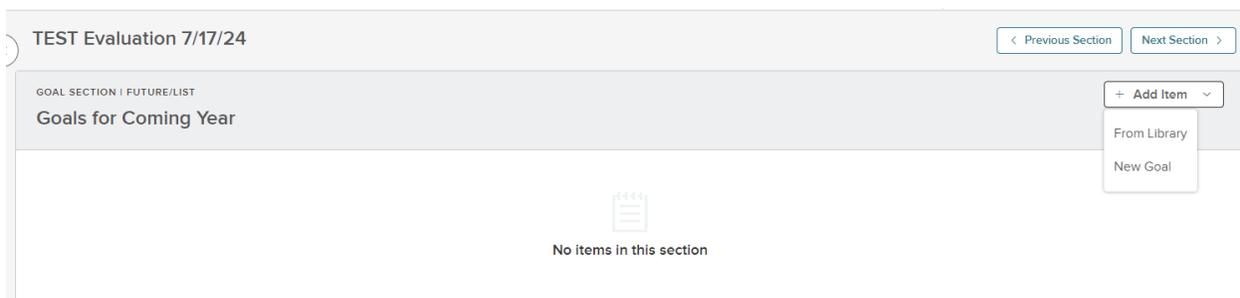
The ratings in this section should be marked as not applicable if the employee has been with us less than a year and/or no goals were provided previously.

The next step is for the manager to rate competencies.



**The manager must rate the competencies.** The manager can add comments to the competencies.

**Manager will add goals for the coming year, following the same procedure as above:**



Add at least 3 goals, the maximum is 8 goals.

Once all content items have been added, click on the **Submit Content** button on the left side of your screen.

### Add/Edit Content

**Task Due Date:**  
Wed, Jul 17, 2024

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**Employee:**  
UT UMD Test UMD 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**

GOAL SECTION | DARTMOUTH NON-UNIT SALARIED

### Feedback from Previous Year's Goals

	Items
⋮	GOAL 1
⋮	GOAL 2
⋮	GOAL 3

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.

**Submit Content**

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

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

No, Let's Go Back

Yes, I'm Finished

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

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

## Meeting with employee to discuss evaluation

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

**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 admins. Mark the task as complete once the meeting has concluded.

**Comments**

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

## Manager 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.

**UT** UMD Test UMD Test  
Test Position

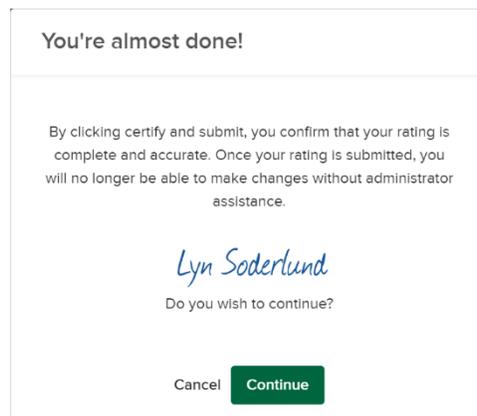
EVALUATION NAME  
TEST Evaluation 7/17/24

DUE DATE  
Wed, Jul. 17,  
2024

Approve & Sign Deny

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

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



The screenshot shows a confirmation dialog box with the following content:

- Title: You're almost done!
- Text: 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.
- Signature: *Lyn Soderlund*
- Text: Do you wish to continue?
- Buttons: Cancel and Continue (highlighted in green)

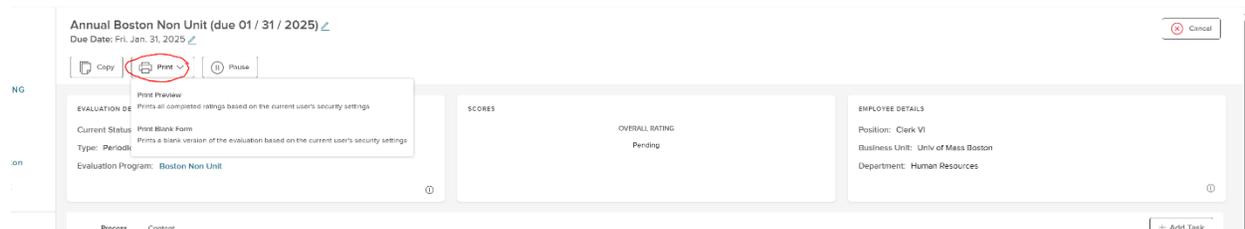
**PLEASE NOTE :** Once **SUBMIT** is selected, no changes can be made. If the manager needs to edit, click **Cancel** to make edits.

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

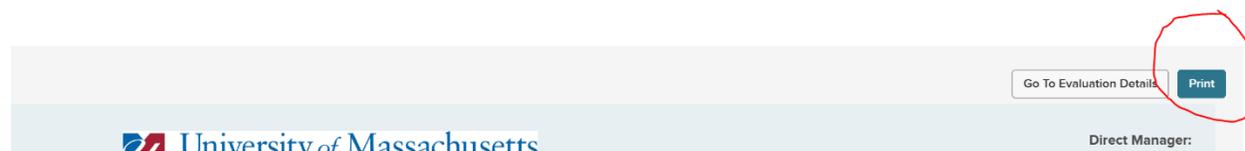
Once the manager clicks **Submit**, no changes can be made, and the evaluation will route to the employee for signature. **Cancel** is the manager's last opportunity to make changes.

## Viewing and printing an evaluation

To see what content was entered, select Print Preview.



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

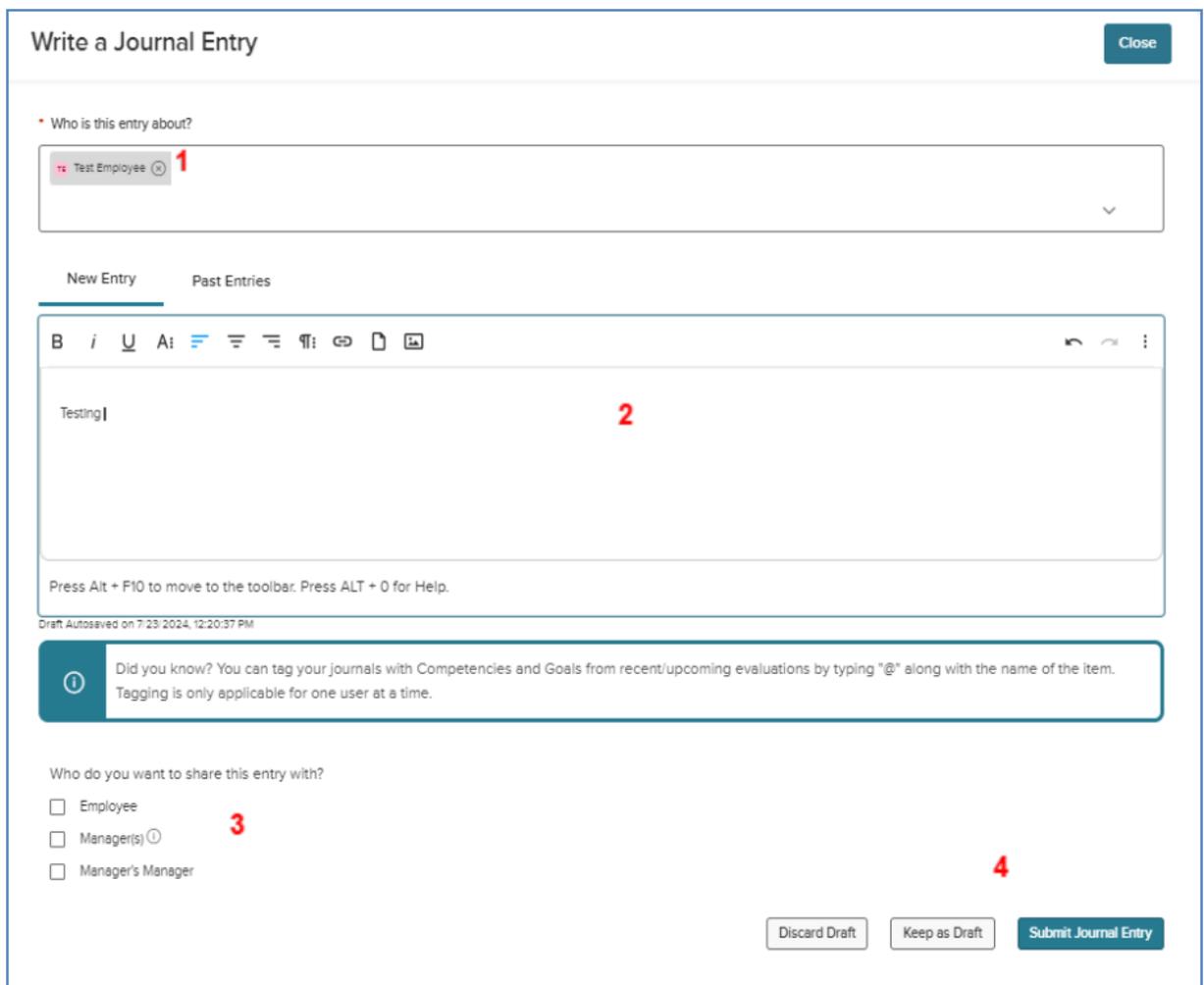
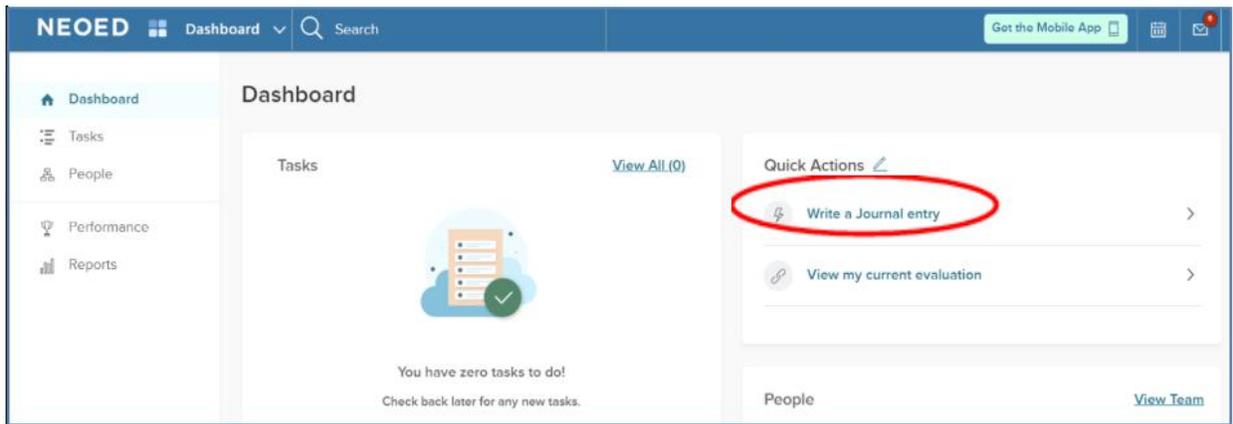


## Journal entries

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**.

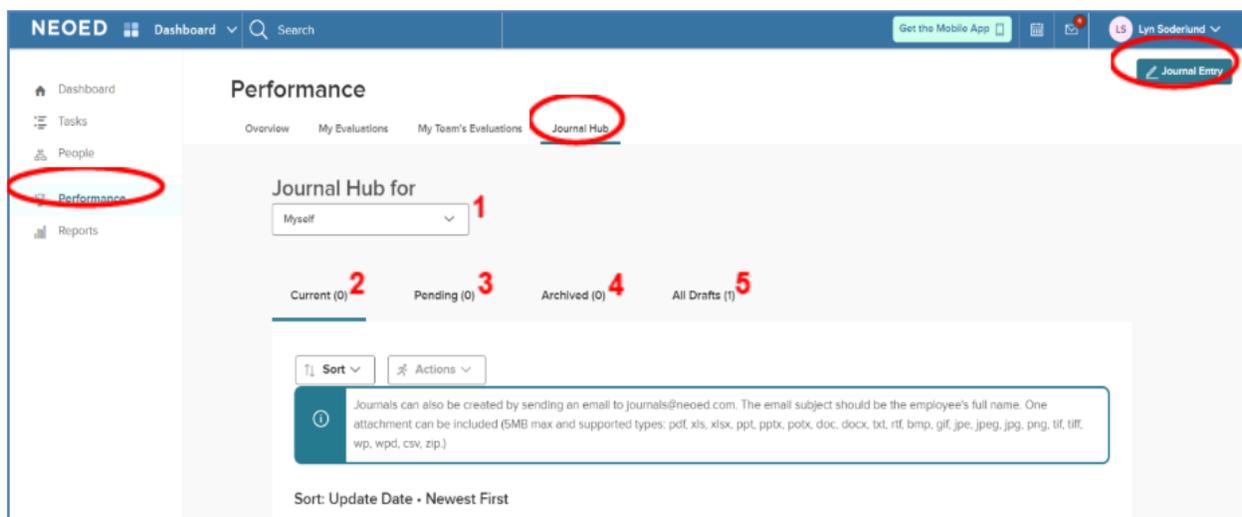
# Viewing Journal Entries

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

From: donotreply@neoed.com <donotreply@neoed.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.



1. Choose whose Journal entries you would like to review from the dropdown menu. You can review any entries you have created or that have been shared with you.

2. **Current:** Any Journal Entries successfully posted can be found in the Current tab.

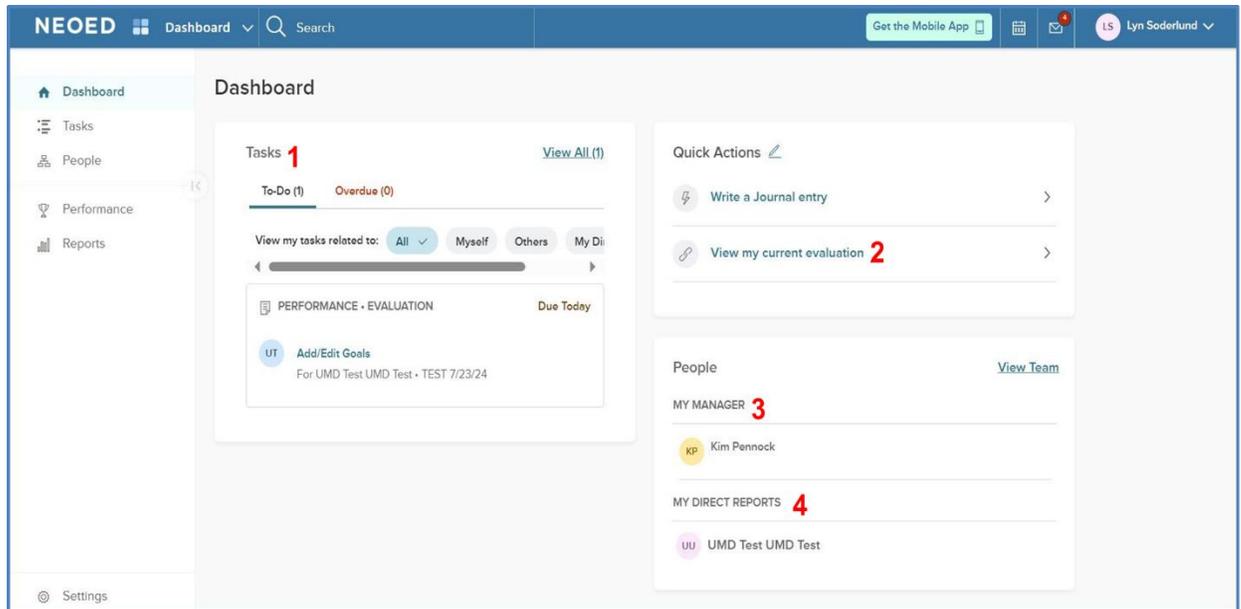
3. **Pending:** Any Journal Entries that have not been successfully posted. Once completed, the Journal Entry is posted to the Current tab.

4. **Archived:** Any Journal Entries that have been Archived can be found in the Archived tab. Entries can be unarchived from this tab.

5. **All Drafts:** Any Journal Entries kept as drafts or not successfully posted can be found and finalized.

## **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).

**Questions?** Email [eperformance@umb.edu](mailto:eperformance@umb.edu)

## **Tips**

**All users are highly encouraged to use one of three supported browsers:**

**Google Chrome**

**Internet Explorer 11 or higher**

**Microsoft Edge**

You may use Firefox or Safari, but as these are not supported browsers, any issues encountered are unlikely to be resolved. If you encounter any issues, the first step in trying to resolve the issue would be to clear the browser's cookies and cache. To do so, select: Ctrl + Shift + Delete.

This fix solves most user issues. If this still does not fix the issue, try using a different supported browser. If you are still encountering the issue, please take any relevant screen shots of the issue, such as an error message, and send this to your HR Admin. Include as much information as possible.

NEOED videos for employees and managers  
on how to complete various parts of the evaluation process:

- Adding Content (Goals) to an Evaluation (Managers) - <https://neogov-2.wistia.com/medias/9b2f5nmdl2>
- Rating a Self-Evaluation (Employees) - <https://neogov-2.wistia.com/medias/pp930kba5y>
- Rating an Employee's Evaluation (Managers) - <https://neogov-2.wistia.com/medias/u9muswktp1>
- Signing and Approving an Evaluation (Managers) - <https://neogov-2.wistia.com/medias/7gl3kh7rhw>
- Signing an Evaluation (Employees) - <https://neogov-2.wistia.com/medias/rq5x4uzi87>
- Refusing to Sign an Evaluation (Employees) - <https://neogov-2.wistia.com/medias/rfpfz3k792>