

# Halogen eAppraisal





My Performance and My Employees

# Using System Features as an Employee

- Activity Tracker
- Goals
- Development Plans/Professional Development
- 1:1 Meetings
- Feedback
- Documents

# Navigating the System: My Performance


UCMERCED



Logout  










Home **My Performance**

Profile 1:1 Meeting **Goals** Development Plans Feedback Evaluations Documents

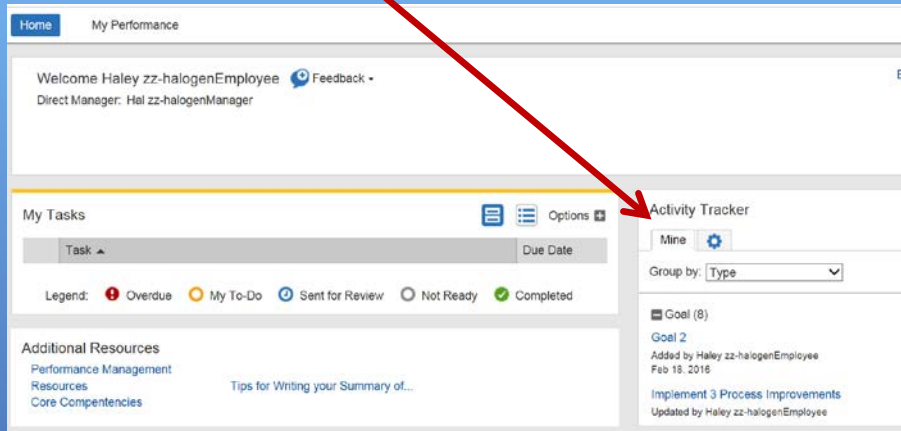
## My Performance

Goals Add Delete Options 

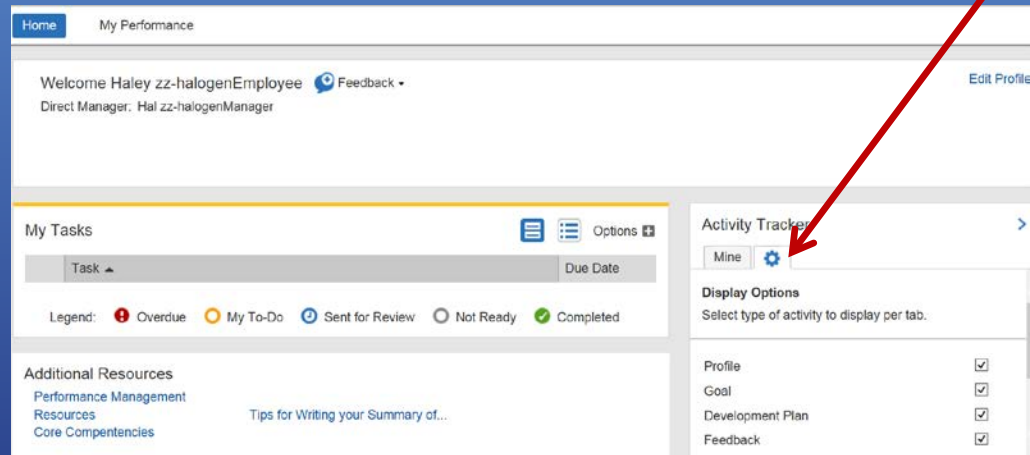
Page 1 of 1   Displaying 1 - 3 of 3

		Employee Goal ▲	% Co...	Weight	Enter...	Modif...	Due...
		Complete Supervisor Certificate Series	30% 	0	Hal zz- halogen	Feb 18, 2016	May 31, 2016
		 Goal 2	0% 	0	Haley zz- halogen	Feb 18, 2016	

# Home Page: Activity Tracker



- Displays Pending Activities
- Customizable Display Options



# Goals

Home **My Performance**



Profile 1:1 Meeting **Goals** Development Plans Feedback Evaluations Documents

## My Performance

### Goals

[Add](#) [Delete](#) [Options](#) **+**

Page 1 of 1 | [Print](#) [Export](#) | Displaying 1 - 3 of 3

<input type="checkbox"/>	<b>+</b>	Employee Goal ▲	% Co...	Weight	Enter...	Modif...	Due...
<input type="checkbox"/>	<b>+</b>	 Complete Supervisor Certificate Series	30% <div><div></div></div>	0	Hal zz- halogenf	Feb 18, 2016	May 31, 2016
<input type="checkbox"/>	<b>+</b>	 Goal 2	0% <div><div></div></div>	0	Haley zz- halogenf	Feb 18, 2016	

### Goal Details

Description: Satisfactory complete all modules of the series and receive certification.





Linked To: None Category: None

Start Date: Feb 1, 2016 Due Date: May 31, 2016 Completed Date: Apr 29, 2016

Status: **In Progress** ▼

Percent Complete: 30% ▼

Progress Flag

☒  On Track
 ☐  At Risk
 ☐  Not on Track
 ☐  No Flag Set

Last Modified: Feb 18, 2016 Created Date: Apr 15, 2015

Notes  
[Add a note](#)

Employee can:

- View goals from annual appraisal;
- Create own goals; viewable by manager;
- Delete own goals, but not those created by management; and
- Update start date; due date; and completion date; status; percent completed; and progress flag; add, edit, and delete notes.
- Employee **cannot** modify title or description unless manager grants access.

# Development Plans

Home My Performance

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Documents

### My Performance

Use this section to view and manage your personal development plans.

#### Development Plans

Add Delete Options +

Page 1 of 1

Development Plan	Competency	Status	Entered By	Due...	Comp...
Project Management		In Progress	Haley zz-halogenEmployee	Mar 12, 2016	

### Development Plan

Details Development Activities

Employee: Haley zz-halogenEmployee

\* Title: Project Management

Description: Participate in project management training.

Related Competency: N/A

Entered By: Haley zz-halogenEmployee

Created Date: Feb 18, 2016

Last Modified: Feb 18, 2016

Due Date: Mar 12, 2016

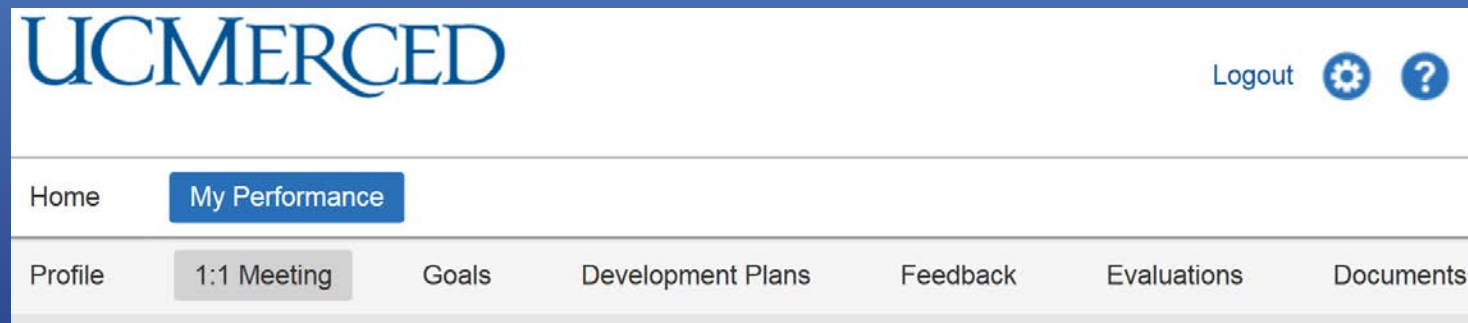
OK Cancel

Employee can:

- View annual development plans;
- Create own Development Plan; viewable by manager;
- Delete own Development Plan, but not those created by management; and
- Update start date; due date; and completion date; status; percent completed; and progress flag; add, edit, and delete notes.
- Employee **cannot** modify title or description unless manager grants access.

# 1:1 Meetings

- Tool intended to facilitate one on one meetings.
- Automatically sets an agenda.
  - When an employee's goals, development plans, or feedback are created or updated, an item is added to the agenda for the 1:1 meeting.
- Use this feature throughout the performance cycle to maintain ongoing dialogue, document progress, and make adjustments as necessary.



# 1:1 Meetings

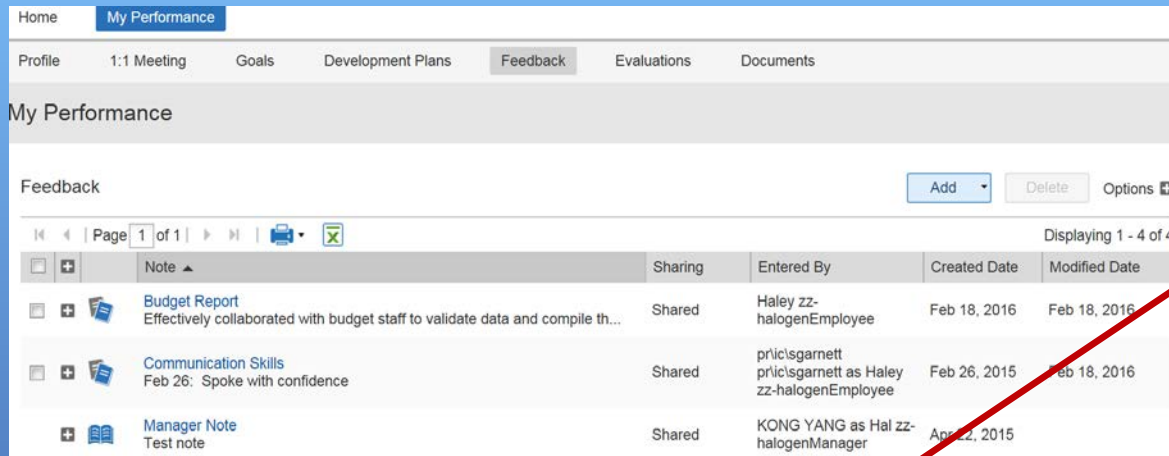
Employees can:

- View agenda Items
- Add feedback
- Add, edit, and delete own comments on agenda items
- Review the minutes of previous 1:1 meetings

The screenshot displays the 'My Performance' web application. At the top, there is a navigation bar with 'Home' and 'My Performance' (highlighted). Below this is a sub-navigation bar with 'Profile', '1:1 Meeting' (highlighted), 'Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The main content area is titled 'My Performance' and is divided into two columns. The left column has tabs for 'Agenda' (selected) and 'Past Meetings'. Under the 'Agenda' tab, there is a 'Sort by: Date' dropdown and a list of items: 'Communication Skills' (Added: Feb 18, 2016), 'Complete Supervisor Certificate Series' (Added: Feb 18, 2016), 'Goal 2' (Added: Feb 18, 2016), 'Implement 3 Process Improvements' (Added: Feb 18, 2016 • 1 new comments), and 'Manager Note' (Added: Feb 18, 2016). The right column shows details for the selected item, 'Project Management', entered by 'Haley zz-halogenEmployee'. It includes a description 'Participate in project management training.', a 'Competency' of 'None', a 'Status' of 'In Progress', a 'Due Date' of 'Mar 12, 2016', and a 'Completed Date' field. At the bottom, there is a 'Comments (1)' section with a link to 'Previous comments' and a text input field labeled 'Add a comment...'.



# Feedback

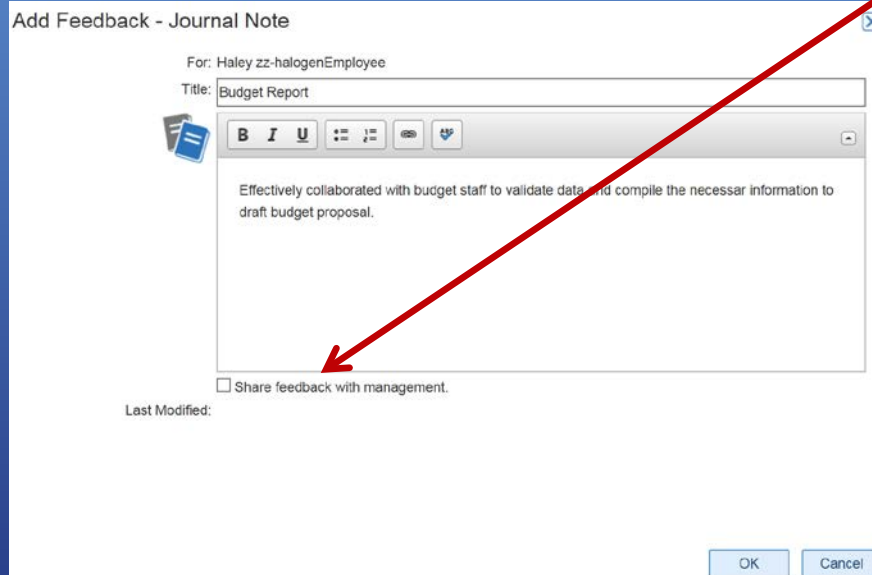


The screenshot shows the 'My Performance' page with a navigation bar including 'Home', 'My Performance', 'Profile', '1:1 Meeting', 'Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The 'Feedback' tab is active. Below the navigation bar, there's a 'Feedback' section with 'Add', 'Delete', and 'Options' buttons. A table displays feedback entries with columns for 'Note', 'Sharing', 'Entered By', 'Created Date', and 'Modified Date'. The table shows three entries: 'Budget Report', 'Communication Skills', and 'Manager Note'. A red arrow points from the 'Add' button in the table to the 'Add Feedback - Journal Note' dialog box below.

Note	Sharing	Entered By	Created Date	Modified Date
<b>Budget Report</b> Effectively collaborated with budget staff to validate data and compile th...	Shared	Haley zz-halogenEmployee	Feb 18, 2016	Feb 18, 2016
<b>Communication Skills</b> Feb 26: Spoke with confidence	Shared	pric'sgarnett pric'sgarnett as Haley zz-halogenEmployee	Feb 26, 2015	Feb 18, 2016
<b>Manager Note</b> Test note	Shared	KONG YANG as Hal zz-halogenManager	Apr 22, 2015	

Employees can:

- View, add, and delete feedback for themselves;
- Share feedback with managers by selecting the 'share feedback with management' box or leave it private;
- Feedback can highlight accomplishments, or areas of improvement during a performance cycle; and
- Make notes regarding their own performance throughout the performance cycle.



The screenshot shows the 'Add Feedback - Journal Note' dialog box. It has a title field with 'Budget Report' and a text area with the content 'Effectively collaborated with budget staff to validate data and compile the necessar information to draft budget proposal.' Below the text area is a checkbox labeled 'Share feedback with management.' which is currently unchecked. At the bottom are 'OK' and 'Cancel' buttons. A red arrow points from the 'Add' button in the table above to the 'Add Feedback - Journal Note' dialog box.

Add Feedback - Journal Note

For: Haley zz-halogenEmployee

Title: Budget Report

Effectively collaborated with budget staff to validate data and compile the necessar information to draft budget proposal.

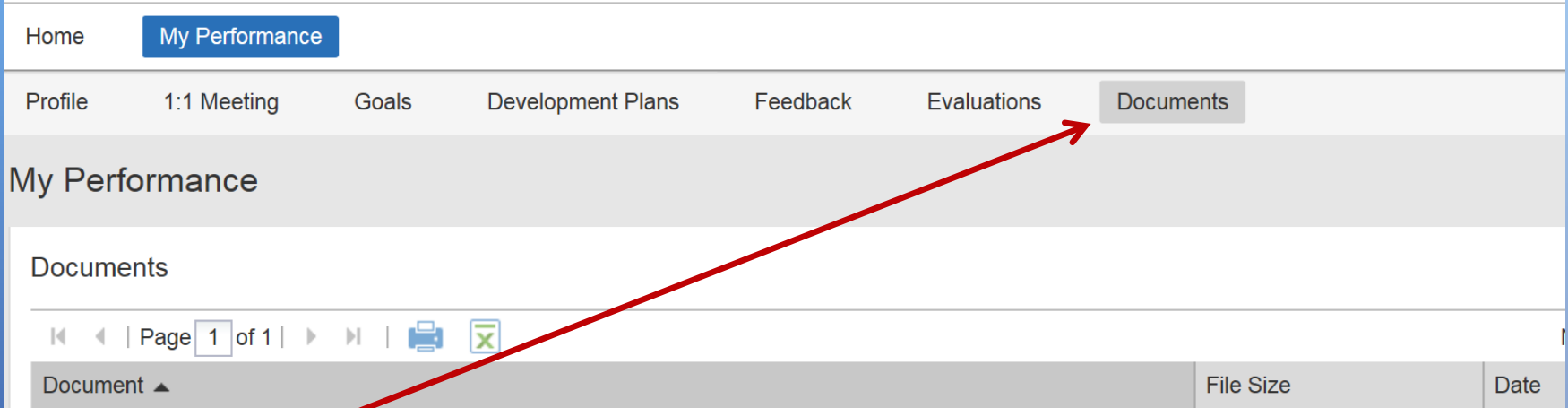
☐ Share feedback with management.

Last Modified:

OK Cancel

# Documents

UCMERCED



The screenshot shows the UCMERCED web interface. At the top, there is a navigation bar with links: Home, My Performance (highlighted in blue), Profile, 1:1 Meeting, Goals, Development Plans, Feedback, Evaluations, and Documents (highlighted in grey). Below this, the 'My Performance' section is visible. Underneath, there is a 'Documents' section with a pagination bar showing 'Page 1 of 1' and icons for printing and viewing. Below the pagination bar is a table with columns: Document, File Size, and Date. A red arrow points from the 'Documents' tab in the navigation bar to the 'Documents' section below.

Home My Performance

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Documents

My Performance

Documents

Page 1 of 1

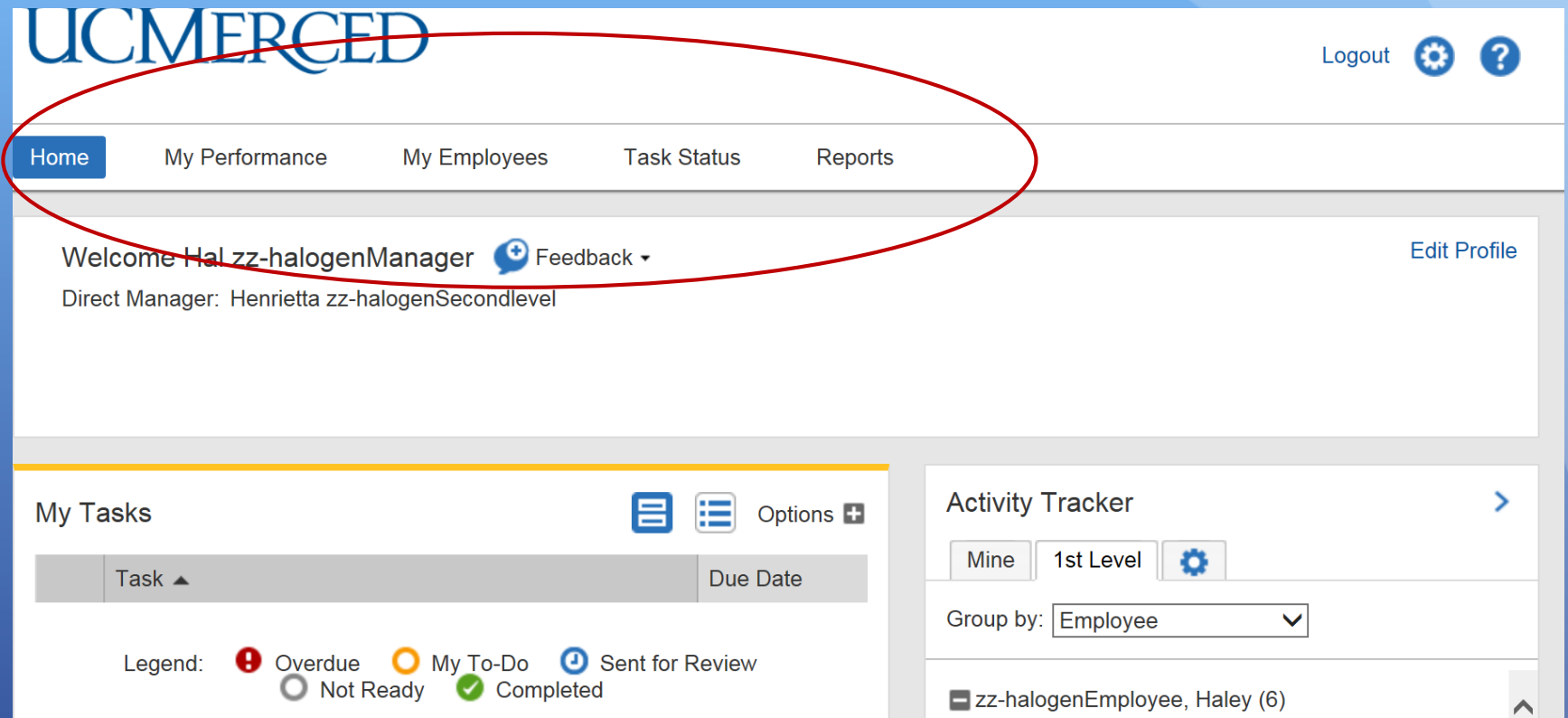
Document ▲	File Size	Date
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- Employees have access to view documents uploaded to their profile, but cannot add or delete.



# Using System Features as a Manager

- Activity Tracker
- Goals
- Development Plans/Professional Development
- 1:1 Meetings
- Feedback
- Recognition
- Documents


# Navigating Halogen



UCMERGED

Logout  




Home My Performance My Employees Task Status Reports

Welcome Hal zz-halogenManager  Feedback [Edit Profile](#)






Direct Manager: Henrietta zz-halogenSecondlevel

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### My Tasks

  Options 

Task ▲	Due Date
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Legend:  Overdue  My To-Do  Sent for Review  Not Ready  Completed

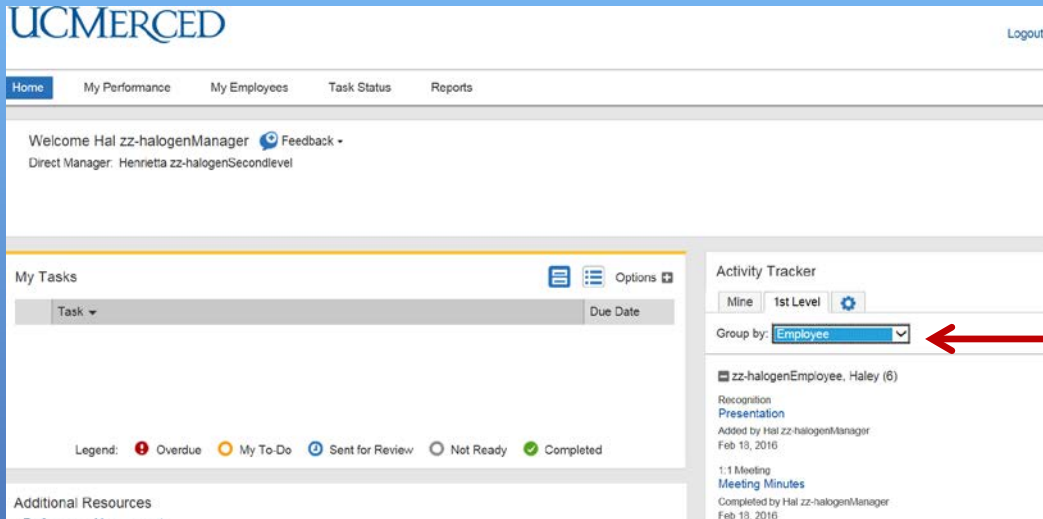
### Activity Tracker

Mine 1st Level 

Group by:

zz-halogenEmployee, Haley (6)

# Home Page: Activity Tracker



First Level Manager Can:

- View tasks for all direct reports
- Group data by date, type, and employee

Second Level Manager Can:

- View tasks for staff reporting to his/her direct reports
- Group by date, type, and employee

## Activity Tracker

Mine

1st Level

2nd Level



Group by: Employee



zz-halogenManager, Hal (4)

# My Employees


Home My Performance **My Employees** Task Status Reports



My Employees Feedback

Search First and/or Last Name Search Show All Advanced Search

Employees

Page 1 of 1 Displaying 1 - 2 of 2

First Na...	Last Name	Direct Manager	Relation...	Type	Prof...	1:1 Mee...	Go...	De...	Feedback	Ev...	Do...
Harriet	zz-halogenHR	Hanna zz-halogenVicePre		Direct report	View	View	0	0	0	0	0
Henrietta	zz-halogenSec	Hanna zz-halogenVicePre		Direct report	View	View	1	1	0	0	0

Legend:  Direct Reports  Secondary Managers

## 1st Level View

### Top-Down View:

- If your employees have direct reports, you can access that information by clicking on the organizational chart icon
- Can view employee profiles: goals, development plans, feedback, recognition, etc.





My Employees > Henrietta zz-halogenSecondlevel Viewing: Henr

Search First and/or Last Name Search Show All

Direct Reports

Page 1 of 1

First...	Last Name	Direct...	Relati...	Type	Profile...	1:1 M...	G...	D
Hal	zz-halogenManage	Henri... zz-halogenS		Direct report	View	View	1	

Legend:  Direct Reports

## 2nd Level View

# 1:1 Meeting

UCMERGED

Home My Performance **My Employees** Task Status Reports

Profile **1:1 Meeting** Goals Development Plans Feedback Evaluations Documents

My Employees > Haley zz-halogenEmployee

Agenda Past Meetings

Your meeting is currently in progress

**End Meeting**

Sort by: Date

**Conversation Starter**

**Budget Report**  
Added: Feb 18, 2016

**Communication Skills**  
Added: Feb 18, 2016

**Complete Supervisor Certificate Series**  
Added: Feb 18, 2016

**Goal 2**  
Added: Feb 18, 2016

**Implement 3 Process Improvements**  
Added: Feb 18, 2016 • 1 new comments

**Manager Note**  
Added: Feb 18, 2016

**Goal 2**  
Entered By Haley zz-halogenEmployee

**Recurring**

Testing goal 2

**Linked To**  
None

**Status**  
0% Complete

Due Date:  
Completed Date:

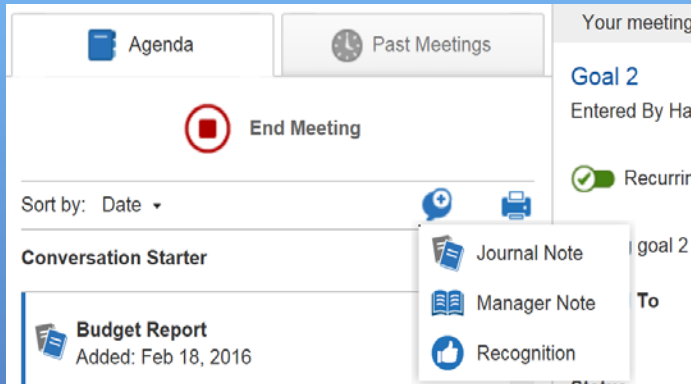
**Comments (1)**  
[Previous comments](#)

Add a comment...

Manager Can:

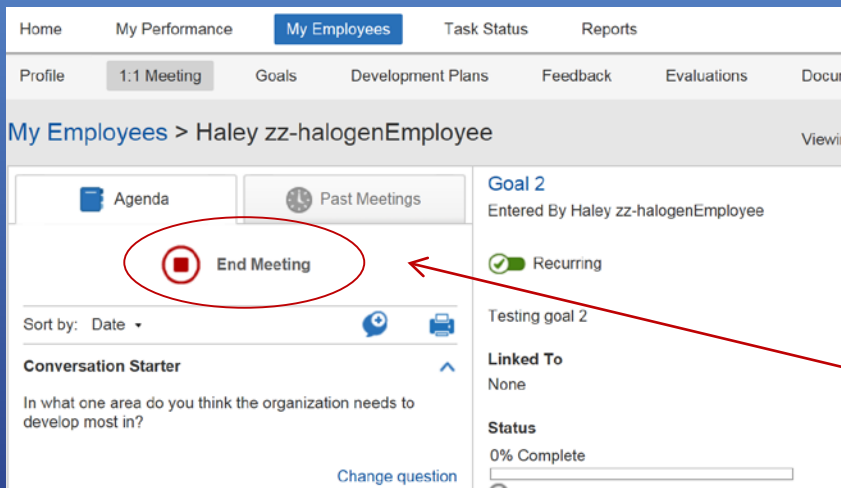
- Start and end 1:1 meetings;
- Turn 'recurring' agenda items on/off;
- Change or hide conversation starting questions - *Conversation starters are questions that help you start discussions with your employees.*
- Add comments to agenda items;

# 1:1 Meeting



## Manager Can Write:

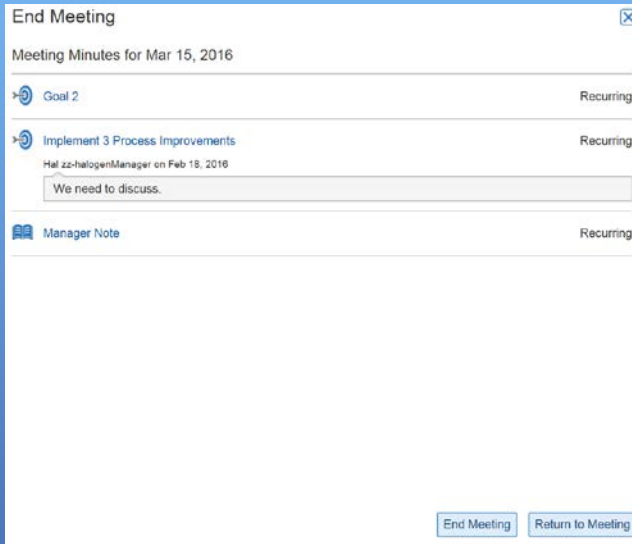
- Journal Notes - will populate in the manager's profile.
- Manager Notes - will populate in the 1:1 agenda notes.
- Recognition



End Meeting



# 1:1 Meeting



End Meeting

Meeting Minutes for Mar 15, 2016

Goal 2 Recurring

Implement 3 Process Improvements Recurring

Hal zz-halogenManager on Feb 18, 2016

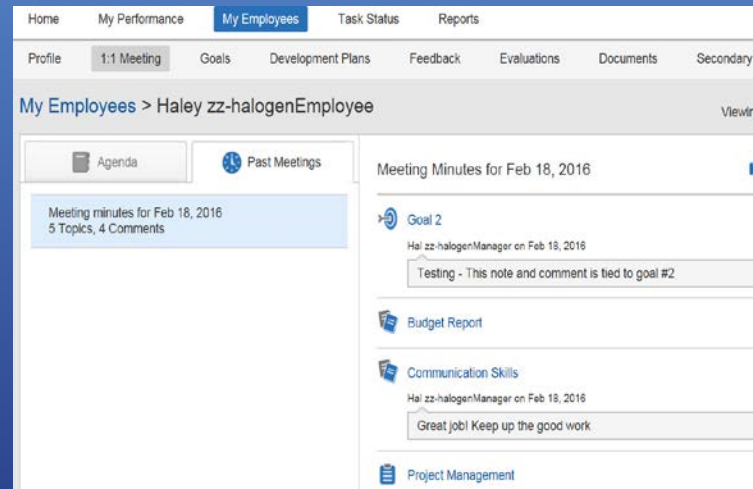
We need to discuss.

Manager Note Recurring

End Meeting Return to Meeting

- Recaps meeting activity

- Records Agenda Meetings



Home My Performance My Employees Task Status Reports

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Documents Secondary M

My Employees > Haley zz-halogenEmployee Viewing:

Agenda Past Meetings

Meeting minutes for Feb 18, 2016 5 Topics, 4 Comments

Meeting Minutes for Feb 18, 2016

Goal 2 Recurring

Hal zz-halogenManager on Feb 18, 2016

Testing - This note and comment is tied to goal #2.

Budget Report

Communication Skills

Hal zz-halogenManager on Feb 18, 2016

Great job! Keep up the good work

Project Management

# Feedback

The screenshot shows a web application interface with a top navigation bar containing 'Home', 'My Performance', 'My Employees' (selected), 'Task Status', and 'Reports'. Below this is a sub-navigation bar with 'Profile', '1:1 Meeting', 'Goals', 'Development Plans', 'Feedback' (selected), 'Evaluations', 'Documents', and 'Secondary Managers'. The main content area is titled 'My Employees > Haley zz-halogenEmployee' and includes a 'Viewing: Haley zz-halogenEmployee' dropdown. The 'Feedback' section has an 'Add' button and a table of feedback items. The table has columns for 'Note', 'Sharing', 'Entered By', 'Created Date', and 'Modified Date'. It displays four items: 'Budget Report', 'Communication Skills', 'Manager Note', and 'Presentation'. A red arrow points from the 'Presentation' item in this table to the 'Feedback Details - Recognition' dialog box shown below.

Note	Sharing	Entered By	Created Date	Modified Date
Budget Report Effectively collaborated with budget staff to validate data and compile th...	Shared	Haley zz-halogenEmployee	Feb 18, 2016	Feb 18, 2016
Communication Skills Feb 26: Spoke with confidence	Shared	pricisgarnett pricisgarnett as Haley zz-halogenEmployee	Feb 26, 2015	Feb 18, 2016
Manager Note Test note	Shared	KONG YANG as Hal zz-halogenManager	Apr 22, 2015	
Presentation Congratulations on a job well done! Keep up the great work.		Hal zz-halogenManager	Feb 18, 2016	

Managers can add the following type of feedback:

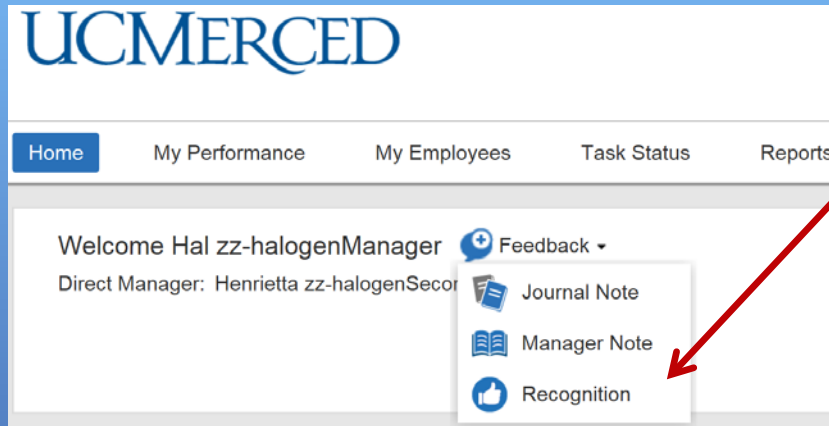
- **Manager Note**: A statement or comment about an employee written by my management; and
- **Recognition**: An Acknowledgment of an achievement or a positive acclaim of performance written by management.
- Managers can use this feature to document observations, provide coaching tips, etc.
- Management can add feedback for employee(s) and decide whether to share the note with the employee.

The dialog box is titled 'Feedback Details - Recognition'. It has a 'For:' field with 'Haley zz-halogenEmployee' and a 'Title:' field with 'Presentation'. Below the title is a text area with a thumbs-up icon and a rich text editor toolbar (B, I, U, bulleted list, numbered list, link, unlink). The text area contains the text 'Congratulations on a job well done! Keep up the great work.' At the bottom, there is a checkbox labeled 'Share feedback with employee' which is currently unchecked. Below the checkbox are 'Last Modified:' and 'Created Date: Feb 18, 2016' fields. At the very bottom are 'OK' and 'Cancel' buttons. A red arrow points from the 'Presentation' item in the table above to the 'Share feedback with employee' checkbox.

# Recognition

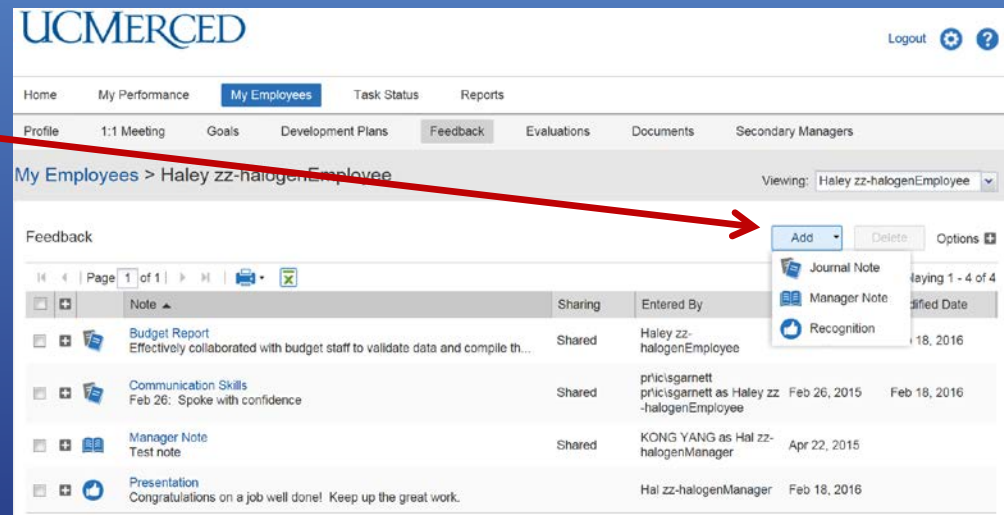
- The Recognition feature is intended to:
- Provide positive feedback to staff regarding their performance.
- Examples: when an employee goes above or beyond to complete a project, meet a deadline or when they have gone above or beyond to provide outstanding customer service, or when they complete a training or certificate program to further develop their knowledge or skills related to their position.

# Recognition



- Write a recognition note directly from home page. In addition to, journal and manager notes.

- Or, from the employees profile account.



# Documents

The screenshot displays the UCMERCED web application interface. At the top, the UCMERCED logo is on the left, and 'Logout' with settings and help icons is on the right. A navigation bar contains links: Home, My Performance, My Employees (active), Task Status, and Reports. Below this, a secondary navigation bar includes Profile, 1:1 Meeting, Goals, Development Plans, Feedback, Evaluations, Documents (active), and Secondary Managers. The main content area shows 'My Employees > Haley zz-halogenEmployee' with a 'Viewing:' dropdown set to 'Haley zz-halogenEmployee'. Below this is a 'Documents' section with 'Add', 'Delete', and 'Options' buttons. A pagination bar indicates 'Page 1 of 1' with navigation icons and a 'No records to display' message. A table header is visible with columns for 'Document', 'File Size', and 'Date'.

UCMERCED

Logout

Home My Performance My Employees Task Status Reports

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Documents Secondary Managers

My Employees > Haley zz-halogenEmployee Viewing: Haley zz-halogenEmployee

Documents Add Delete Options

Page 1 of 1 No records to display

Document	File Size	Date
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- Documents are files that are relevant to an employee's performance, e.g., certificate of accomplishment.
- Managers can add and delete employee documents.

# Reports

Search Title or Description

Search











































Show All

Advanced Search 

## Reports

Page 1 of 1

Displaying 1 - 12 of 12

	Title	Actions	Category	Author	Last Run 
 	<b>Score Report</b> Provides details related to the score for employees within one or multiple ...	   	Evaluations		Apr 17, 2015
 	<b>1:1 Status Report</b> Provides details related to the managers and employees 1:1 meetings.	   	Performance		
 	<b>Competency Rating</b> Provides individual competency appraisal scores for your employees.	  	Evaluations		
 	<b>Development Plan Report</b> Provides insight into the status of development plans.	   	Performance		
 	<b>Employee Development History</b> Provides historical competency score and training effectiveness data for ea...	  	Development		
 	<b>Feedback Report</b> Provides details on all feedback and recognition sent and received through ...	   	Evaluations		
 	<b>Goal Report</b> Provides insight into the status of individual goals.	   	Performance		