UNIVERSITY OF CALIFORNIA MERCED

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

Home Page: Activity Tracker

- Displays Pending Activities

- Customizable Display Options
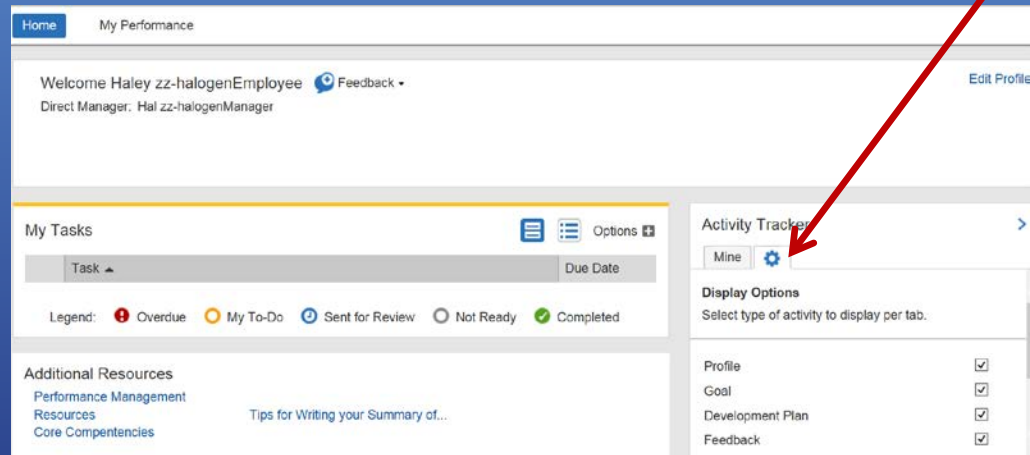
Goals

Home	My Performance						
Profile	1:1 Meeting	Goals	Development Plans	Feedback	Evaluations	Documents	

My Performance

Goals

Add — Delete — Options

| | Page 1 of 1 | | | | Displaying 1 - 3 of 3 |

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

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.
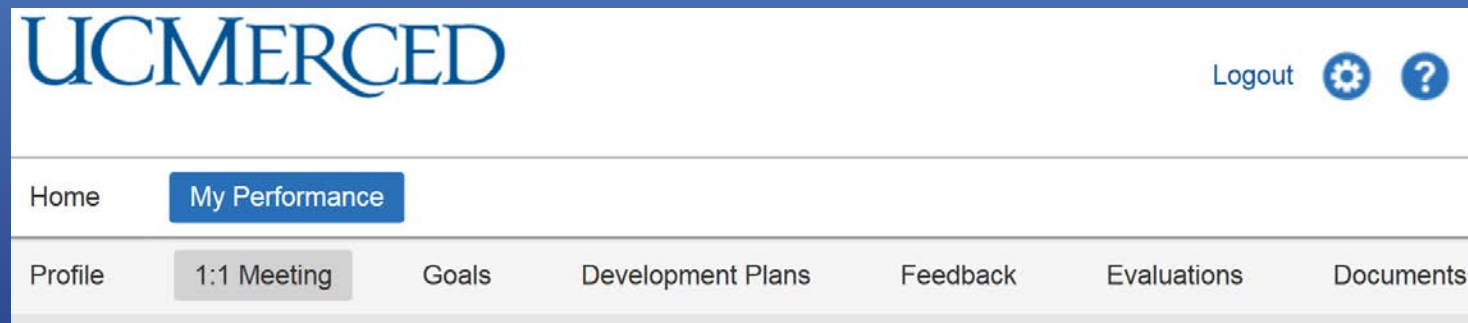
1:1 Meetings
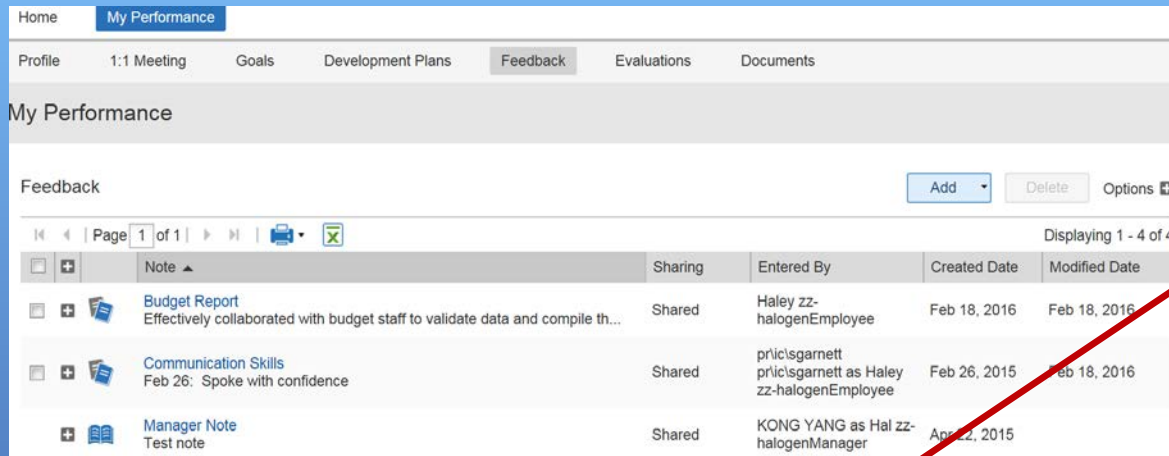
Employees can:

- View agenda Items

- Add feedback

- Add, edit, and delete own comments on agenda items

- Review the minutes of previous 1:1 meetings

Feedback

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.

Documents

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Home	My Performance

Profile	1:1 Meeting	Goals	Development Plans	Feedback	Evaluations	Documents

My Performance

Documents

|◁ ◁ | Page 1 of 1 | ▷ ▷| |
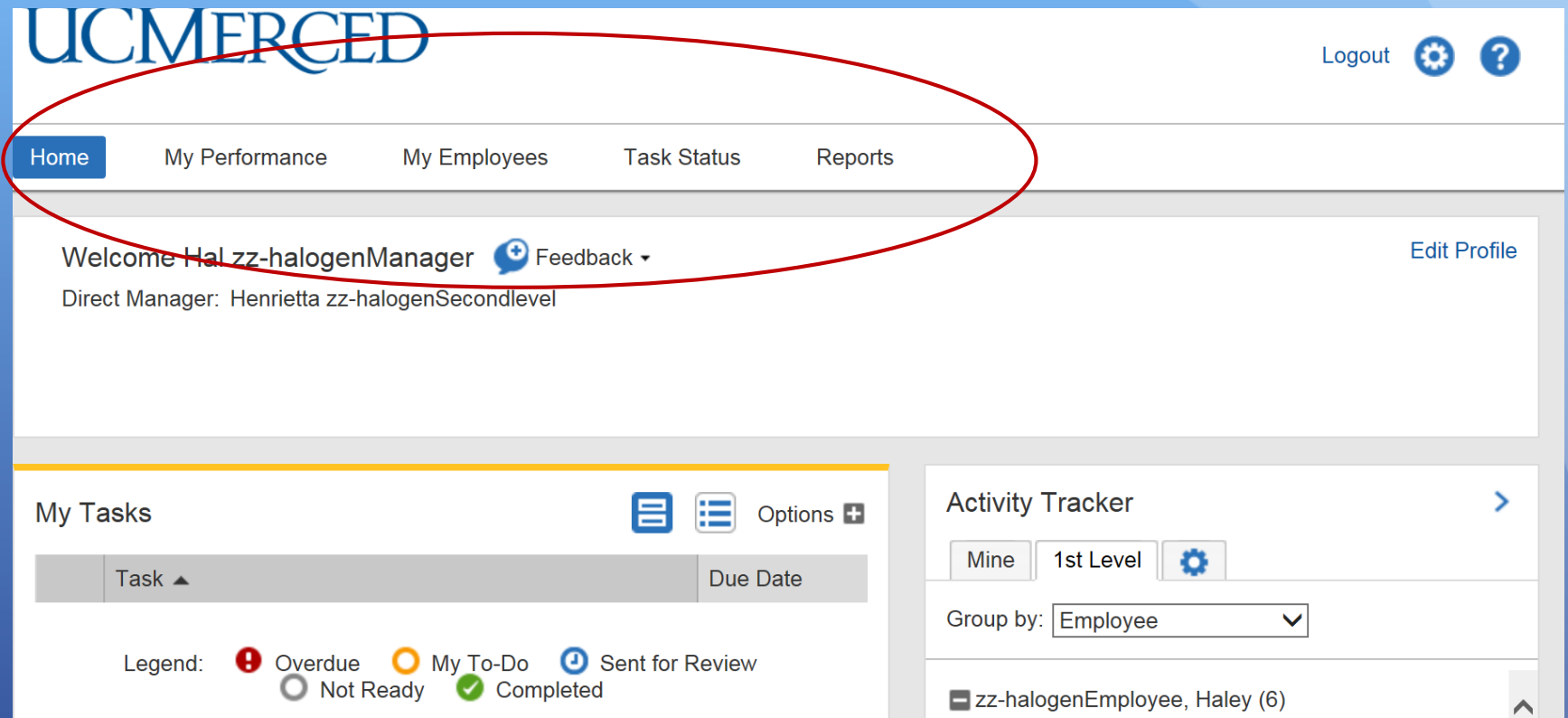
Document ▲	File Size	Date

- 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

Home Page: Activity Tracker
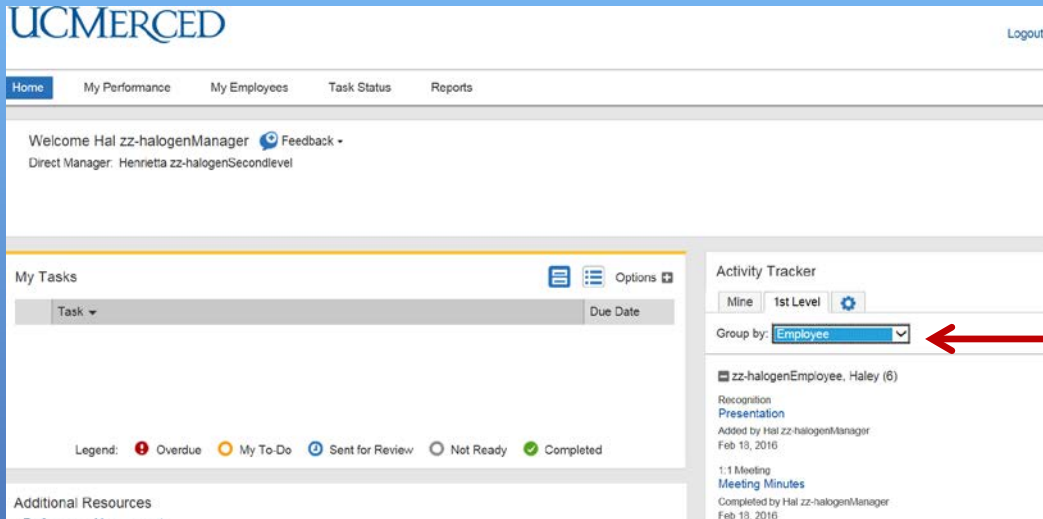
First Level Manager Can:

- 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

My Employees

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.

2nd Level View

1:1 Meeting

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
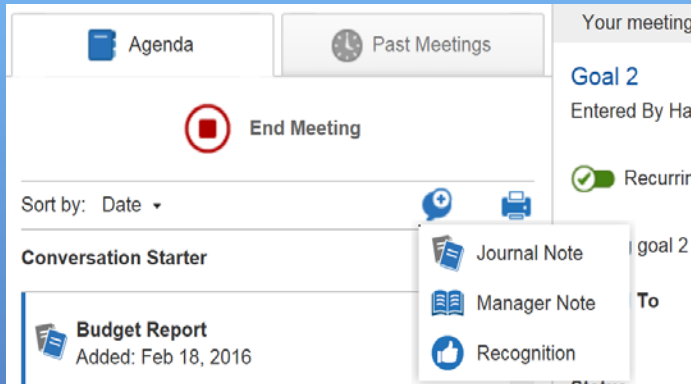
Manager Can Write:
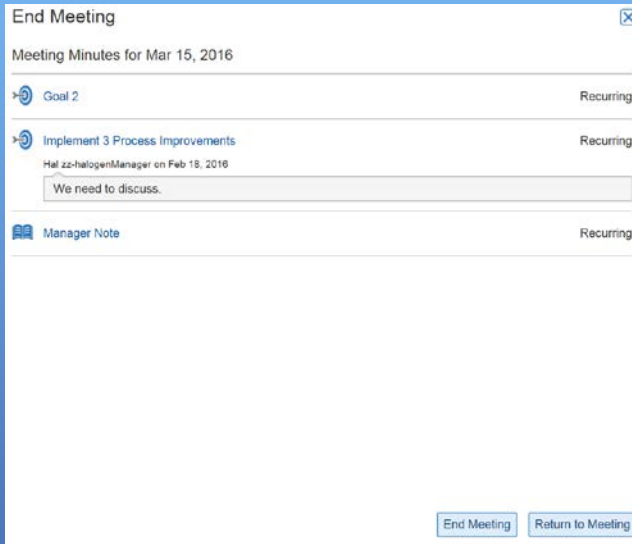
- Journal Notes – will populate in the manager's profile.

- Manager Notes – will populate in the 1:1 agenda notes.

- Recognition
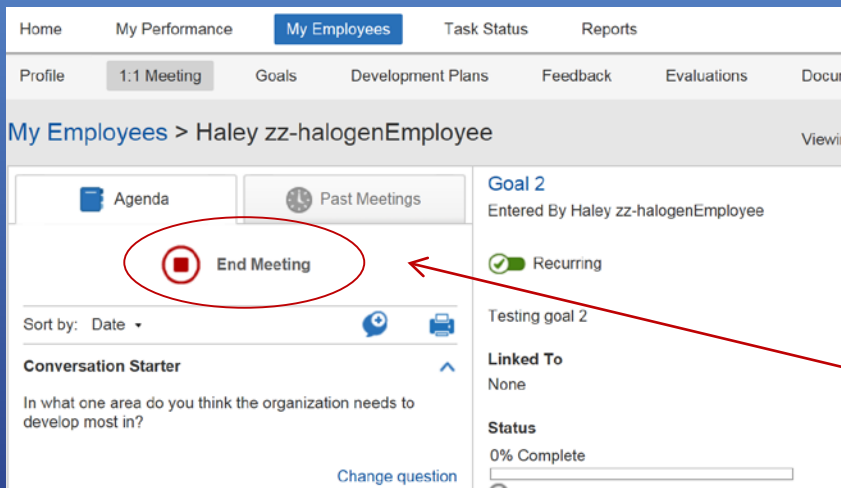
End Meeting
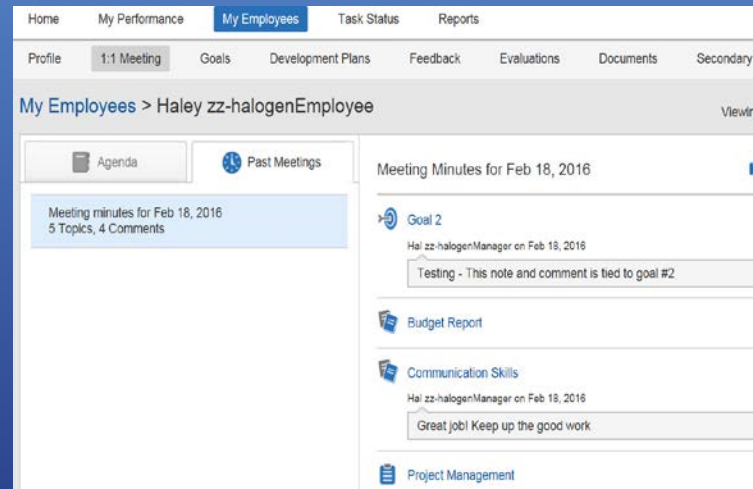
1:1 Meeting

- Recaps meeting activity

- Records Agenda Meetings

Feedback

Managers can add the following type of feedback:

- **Manager Note**: A statement or comment about an employee written 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.

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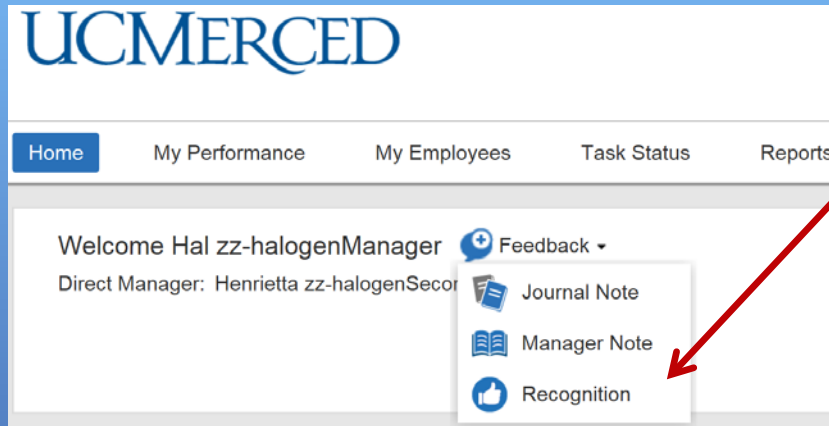
- Write a recognition note directly from home page. In addition to, journal and manager notes.

- Or, from the employees profile account.

Documents

- Documents are files that are relevant to an employee's performance, e.g., certificate of accomplishment.

- Managers can add and delete employee documents.

Reports