

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

UCMERCED

Logout [Settings] [Help]

Home **My Performance** HALOGEN SOFTWARE

**My Performance**

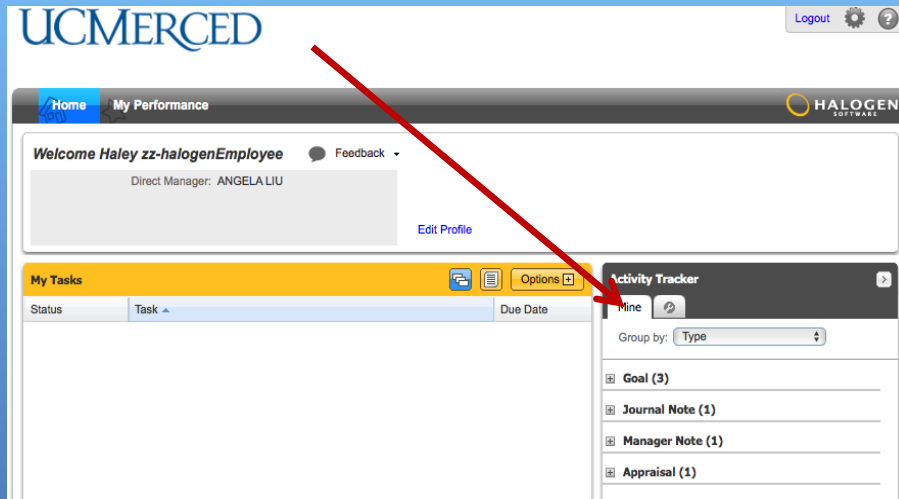
Profile 1:1 Meeting **Goals** Development Plans Feedback Evaluations Documents

**Goals** Add Delete Options

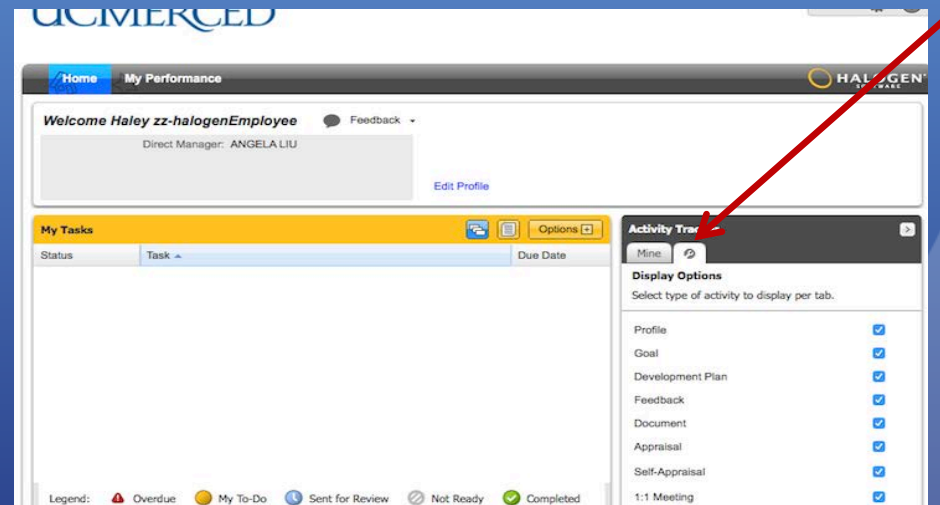
Page 1 of 1 | [Print] [Export] | Displaying 1 - 2 of 2

	P... Fl...	Li...	Employee Goal ▾	% Comp...	Weight	Entered By	Modifi... Date	Due Date
	+	●	Complete Supervisor Certificate Series	30% <div style="width: 30%;"></div>	0	Hal zz- halog...	Feb 18, 2016	May 3 2016
	+	⚠	Implement 3 Process Improvements	0% <div style="width: 0%;"></div>	0	Haley zz- halog...	Feb 17, 2016	Apr 15 2016

# Home Page: Activity Tracker



- Displays Pending Activities
- Customizable Display Options



# Goals

The screenshot shows the 'My Performance' dashboard with a navigation bar containing 'Home', 'My Performance', and the HALOGEN SOFTWARE logo. Below the navigation bar are tabs for 'Profile', '1:1 Meeting', 'Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The 'Goals' section features a table with the following data:

	P... Flag	Li...	% Comp...	Weight	Entered By	Modified Date	Due Date
		Complete Supervisor Certificate Series	30%	0	Hal zz-halog...	Feb 18, 2016	May 31, 2016
		Implement 3 Process Improvements	0%	0	Haley zz-halog...	Feb 17, 2016	Apr 15, 2016

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.

The screenshot shows the detailed view of a goal for employee 'Haley zz-halogenEmployee'. The goal title is 'Complete Supervisor Certificate Series' with a description: 'Satisfactory complete all modules of the series and receive certification.' The goal is currently 'In Progress' with 30% completion. The start date is Feb 1, 2016, and the due date is May 31, 2016. The progress flag is set to 'On Track' (green circle). The goal was last modified on Feb 18, 2016, and created on Apr 15, 2015. A note is present: 'Have completed 2 of the 6 modules.'

# Development Plans

Home My Performance HALOGEN SOFTWARE

**My Performance**

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

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

**Development Plans** Add Delete Options

Page 1 of 1 Displaying 1 - 1 of 1

Development Plan	Competency	Status	Entered By	Due Date	Compl. Date
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

Status: In Progress Completed Date:

Notes

Add a note

Haley zz-halogenEmployee on Feb 18, 2016

Need to identify course and make travel arrangements if necessary.

Add a note...

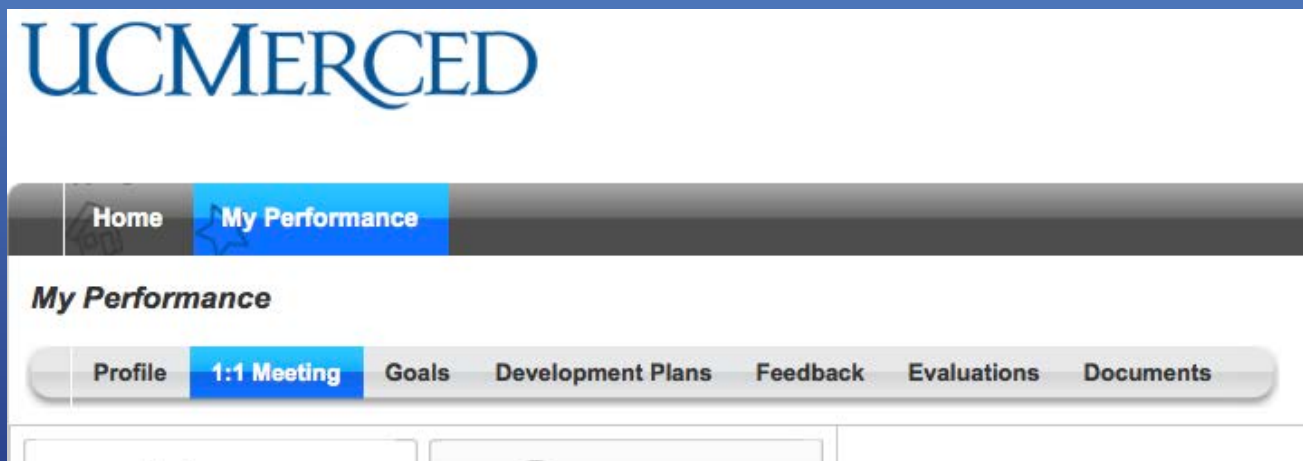
OK Cancel

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

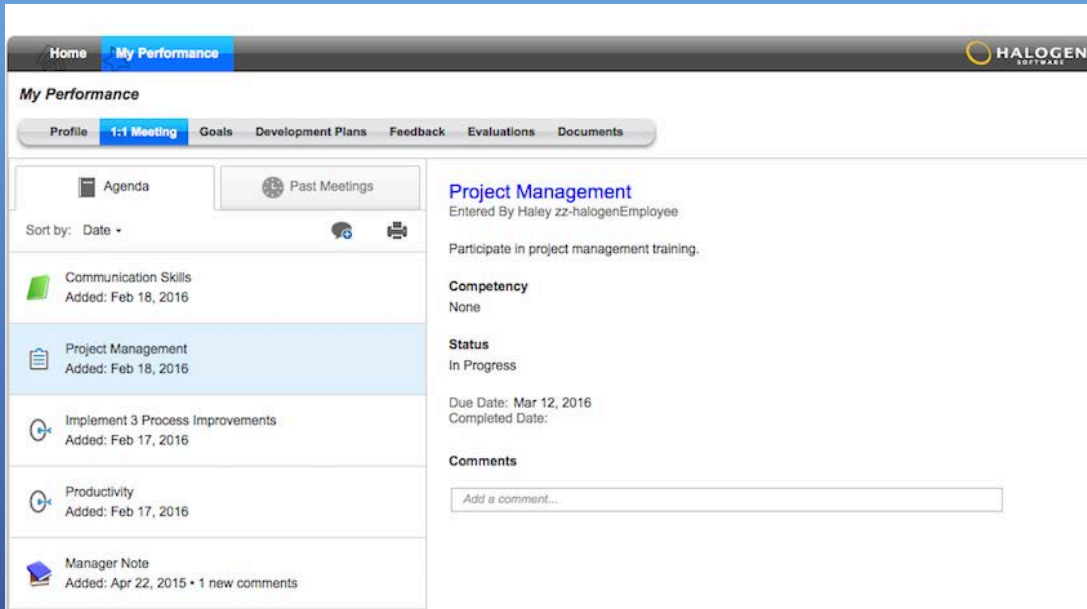
- Tool intended to facilitate one on one meetings.
- Automatically sets an agenda.
  - When an employee's goals, development plans, or feedback are created or updated, an item is added to the agenda for the 1:1 meeting.
- Use this feature throughout the performance cycle to maintain ongoing dialogue, 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' dashboard in the Halogen Software system. The navigation bar includes 'Home', 'My Performance', and the Halogen Software logo. The 'My Performance' section has tabs for 'Profile', '1:1 Meeting', 'Goals', 'Development Plans', 'Feedback', 'Evaluations', and 'Documents'. The '1:1 Meeting' tab is active, showing an 'Agenda' and 'Past Meetings' section. The 'Agenda' is sorted by date and lists items: 'Communication Skills' (Feb 18, 2016), 'Project Management' (Feb 18, 2016), 'Implement 3 Process Improvements' (Feb 17, 2016), 'Productivity' (Feb 17, 2016), and 'Manager Note' (Apr 22, 2015, with 1 new comment). The 'Project Management' item is selected, showing details: 'Entered By Haley zz-halogenEmployee', 'Participate in project management training.', 'Competency: None', 'Status: In Progress', 'Due Date: Mar 12, 2016', and 'Completed Date:'. A 'Comments' section at the bottom has a text input field labeled 'Add a comment...'.



# Feedback

Home My Performance HALOGEN SOFTWARE

My Performance

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Documents

Feedback Add Delete Options

Page 1 of 1 Displaying 1 - 3 of 3

Note	Sharing	Entered By	Created Date	Modified Date
Communication Skills Feb 26: Spoke with confidence	Shared	priclagarnett priclagarnett as Haley zz-halogenEmployee	Feb 26, 2015	Feb 18, 2016
Manager Note Test note	Shared	KONG YANG as Hal zz-halogenManager	Apr 22, 2015	
Wrote from 1:1 feature Using the 1:1 meeting feature helps keep all of us on track.		Haley zz-halogenEmployee	Feb 18, 2016	Feb 18, 2016

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.

Add Feedback - Journal Note

For: Haley zz-halogenEmployee  
Title: Budget Report

**B I U**

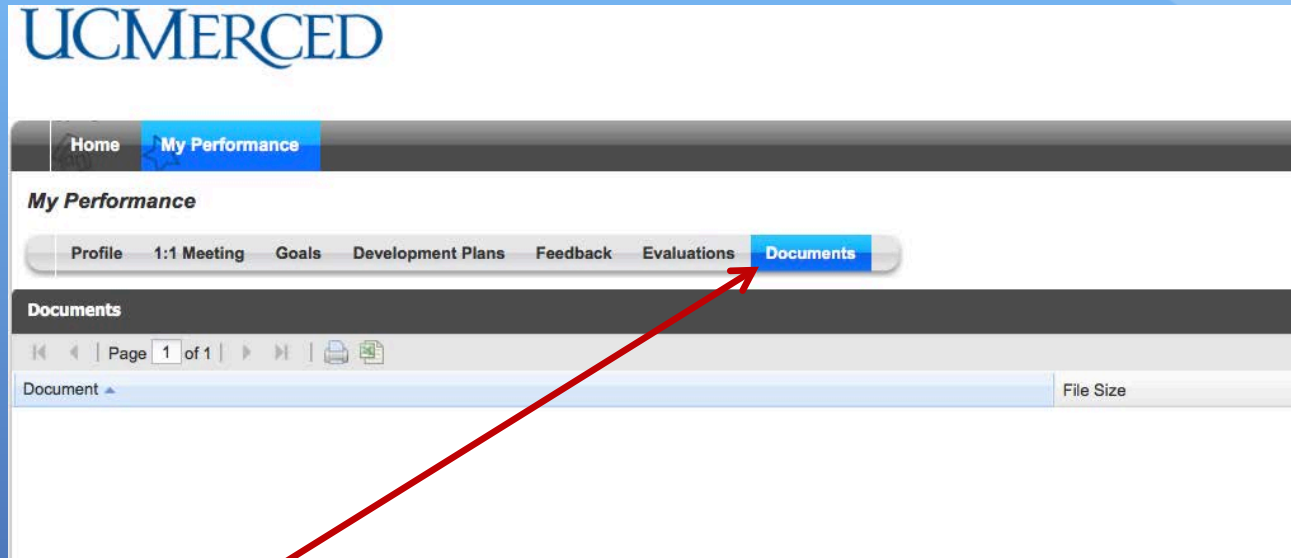
Effectively collaborated with budget staff to validate data and compile the necessary information to draft budget proposal.

Share feedback with management.

Last Modified:

OK Cancel

# Documents



- 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

The screenshot shows the Halogen Software interface for UC Merced. The top navigation bar includes links for Home, My Performance, My Employees, Task Status, and Reports. Below this, the user is identified as Hal zz-halogenManager, with a direct manager listed as Henrietta zz-halogenSecondlevel. An Edit Profile link is visible. The My Tasks section is partially visible at the bottom.

Halogen Software

UCMERCED

Home My Performance My Employees Task Status Reports

Welcome Hal zz-halogenManager Feedback

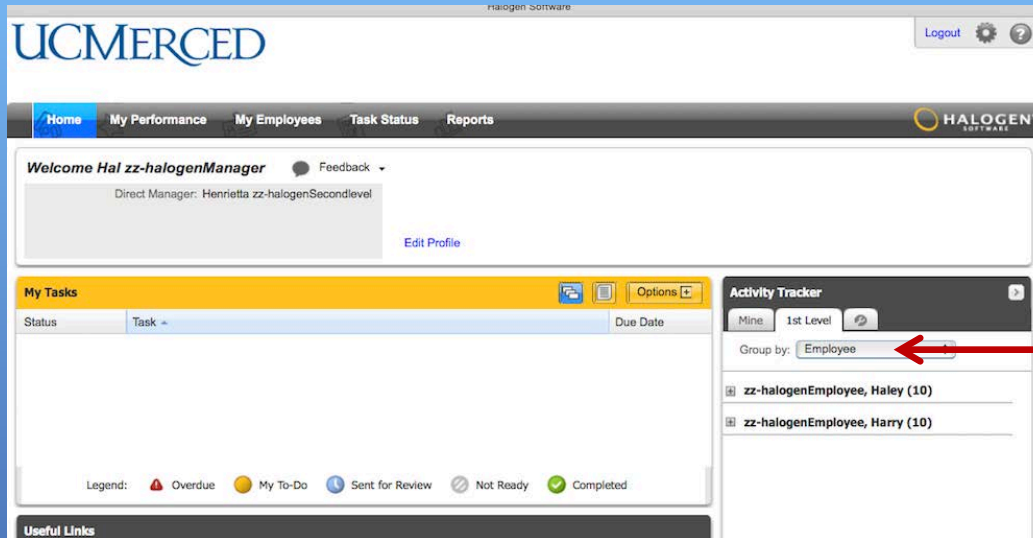
Direct Manager: Henrietta zz-halogenSecondlevel

Edit Profile

My Tasks

Status	Task	Due Date
--------	------	----------

# Home Page: Activity Tracker

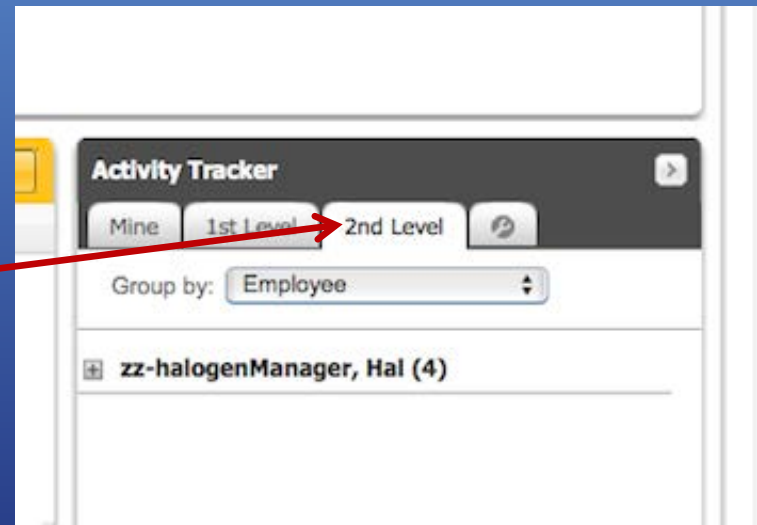


First Level Manager Can:

- 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

My Employees Feedback

Search First and/or Last Name Search Show All


Employees

Page 1 of 1

First Name	Last Name	Direct Manager	Relationships	Type	Profile (Modified)	1:1 Meeting
Harriet	zz-halogenHRRRep	Hanna zz-halogenViceP...		Direct report	View	View
Henrietta	zz-halogenSeco...	Hanna zz-halogenViceP...		Direct report	View	View

1<sup>st</sup> 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

Profile 1:1 Meeting Goals Development Plans Feedback Evaluations Do

Search First and/or Last Name Search Show All

Direct Reports

Page 1 of 1

First Name	Last Name	Direct Manager	Relationships	Type	Profile (Modifi...)
Hal	zz-halogenManager	Henrietta zz-halogenSeco...		Direct report	View

Legend: Direct Reports

2<sup>nd</sup> Level View

# 1:1 Meeting

UCMERCED

Home My Performance My Employees Task Status Reports

My Employees > Haley zz-halogenEmployee

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

Agenda Past Meetings

Your meeting is currently in progress.

Goal 2  
Entered By Haley zz-halogenEmployee

Recurring

Testing goal 2

Linked To  
None

Status  
0% Complete

Due Date:  
Completed Date:

Comments  
Add a comment...

Sort by: Date

Conversation Starter

Goal 2  
Added: Feb 18, 2016

Budget Report  
Added: Feb 18, 2016

Communication Skills  
Added: Feb 18, 2016 • 1 new comments

Project Management  
Added: Feb 18, 2016 • 1 new comments

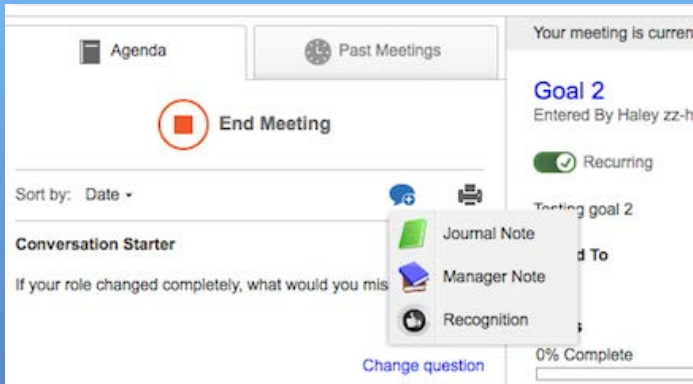
Implement 3 Process Improvements  
Added: Feb 17, 2016

Productivity

Manager Can:

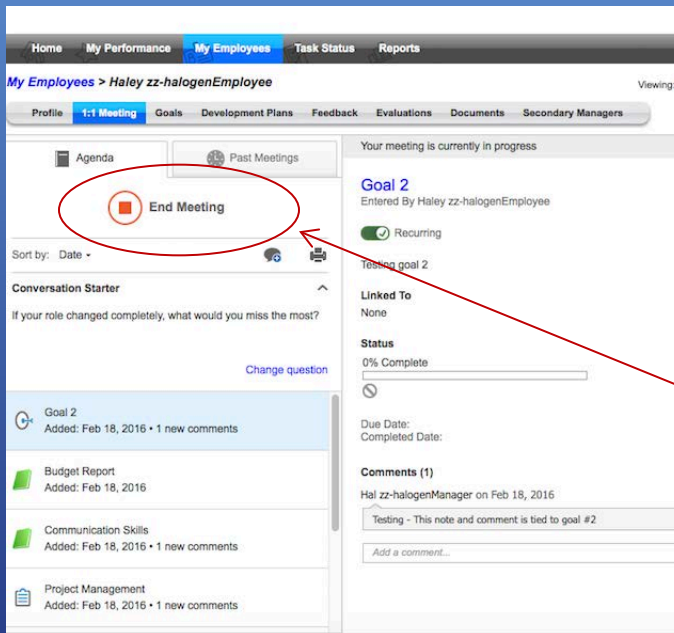
- Start and end 1:1 meetings;
- Turn 'recurring' agenda items on/off;
- Change or hide conversation starting questions - *Conversation starters are questions that help you start discussions with your employees.*
- Add comments to agenda items;

# 1:1 Meeting



Manager Can Write:

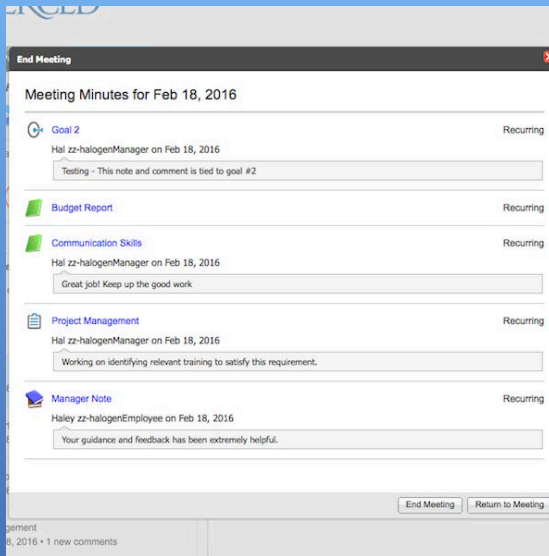
- Journal Notes - will populate in the manager's profile.
- Manager Notes - will populate in the 1:1 agenda notes.
- Recognition



End Meeting

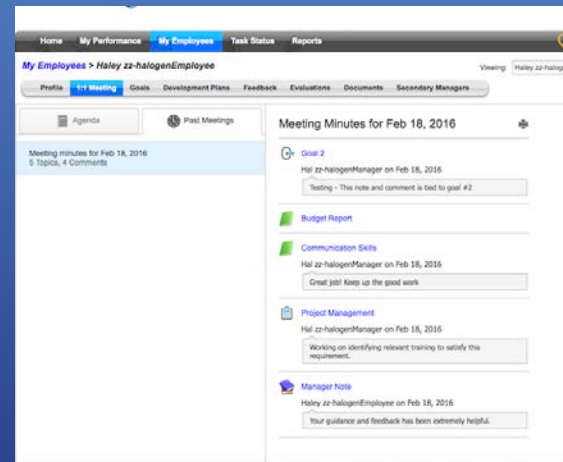


# 1:1 Meeting



- Recaps meeting activity

- Records Agenda Meetings



# Feedback

The screenshot shows a web application interface for managing employee feedback. The main heading is "My Employees > Haley zz-halogenEmployee". Below this, there are navigation tabs: Profile, 1:1 Meeting, Goals, Development Plans, Feedback (selected), Evaluations, Documents, and Secondary Managers. The Feedback section displays a table with the following data:

	Note	Shar...	Entered By	Created Date	Modified Date
	<b>Budget Report</b> Effectively collaborated with budget staff to validate data and compile th...	Shar...	Haley zz-halogenE...	Feb 18, 2016	Feb 18, 2016
	<b>Communication Skills</b> Feb 26: Spoke with confidence	Shar...	pric1sgarnett pric1sgarnett as Haley zz-halogenE...	Feb 26, 2015	Feb 18, 2016
	<b>Manager Note</b> Test note	Shar...	KONG YANG as Hal zz-halogenM...	Apr 22, 2015	
	<b>Presentation</b> Congratulations on a job well done! Keep up the great work.	Hal zz-halogenM...		Feb 18, 2016	

The screenshot shows a "Feedback Details - Recognition" dialog box. It contains the following information:

- For: Haley zz-halogenEmployee
- Title: Presentation
- A rich text editor with a thumbs up icon and a toolbar containing Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, and Undo (AK).
- The text content of the feedback: "Congratulations on a job well done! Keep up the great work."
- A checkbox labeled "Share feedback with employee." with a red arrow pointing to it.
- Metadata: Last Modified: Created Date: Feb 18, 2016
- Buttons: OK and Cancel

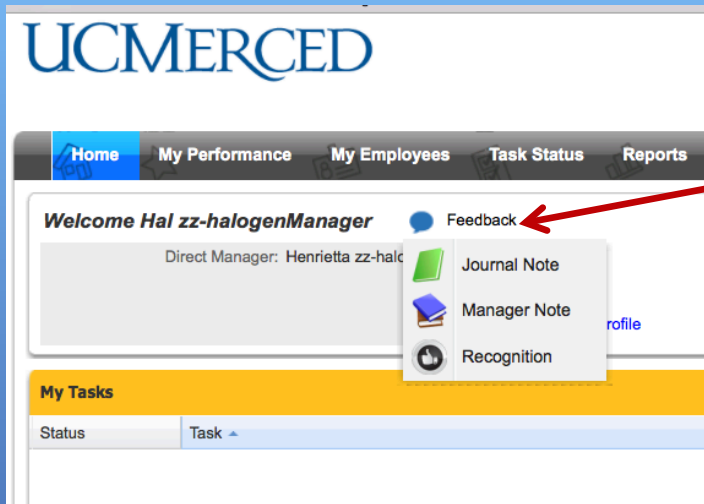
Managers can add the following type of feedback:

- **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.

# Recognition

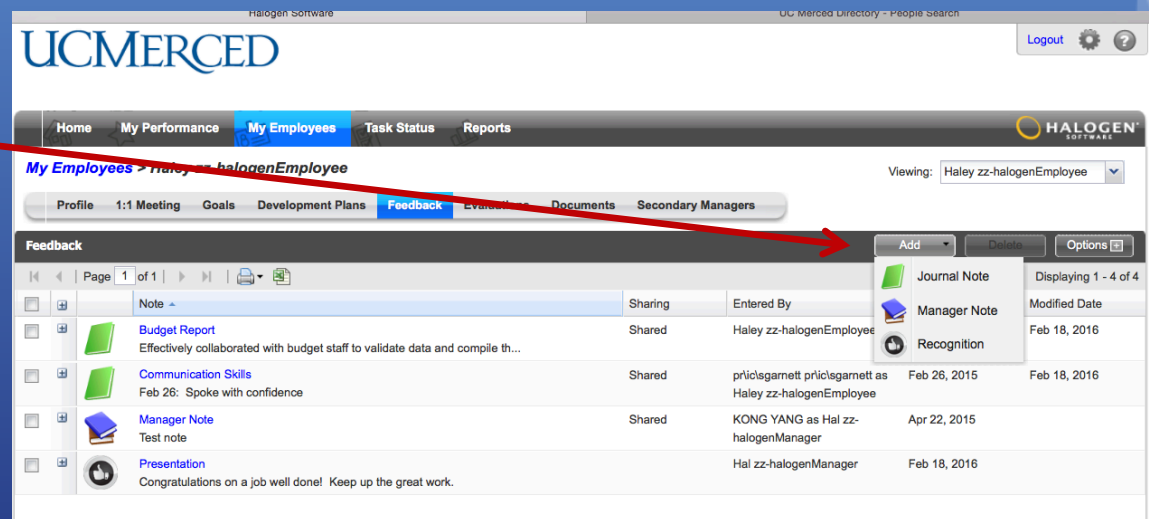
- The Recognition feature is intended to:
- Provide positive feedback to staff regarding their performance.
- Examples: when an employee goes above or beyond to complete a project, meet a deadline or when they have gone above or beyond to provide outstanding customer service, or when they complete a 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 UCMERGED system interface. At the top left is the UCMERGED logo. Below it is a navigation bar with tabs: Home, My Performance, My Employees (selected), Task Status, and Reports. Under the 'My Employees' tab, the breadcrumb path is 'My Employees > Haley zz-halogenEmployee'. To the right of this path is a 'Viewing:' dropdown menu showing 'Haley zz-h'. Below the breadcrumb is a secondary navigation bar with tabs: Profile, 1:1 Meeting, Goals, Development Plans, Feedback, Evaluations, Documents (selected), and Secondary Managers. The main content area is titled 'Documents' and includes an 'Add' button. Below the title is a pagination bar showing 'Page 1 of 1' and icons for back, forward, and print. At the bottom, there is a table header with columns for 'Document', 'File Size', and 'Date'.

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


























































# Reports

Halogen Software www.state.gov/documents/organization/212239.pdf

**UCMERCED** Logout  

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

**Reports** Page 1 of 1 |   | Displaying 1 - 14 of 14

	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>Compensation Details Report</b> Provides details related to compensation adjustments of employees within on...	   	Compensation		
	 <b>Compensation Process Status</b> Provides budget information, a list of compensation steps and status of eac...	  	Compensation		
	 <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		
	 <b>Multirater Status</b> Provides the status of the Multirater assessment requests for your employee...	  	Evaluations		