

# Halogen How To Guide

(revised 12/12/2017)

## **Halogen Performance Management website address:**

<https://global.hgncloud.com/cityofdepere/welcome.jsp>

The following steps take place to complete an annual performance appraisal. Once each step is completed, the next step may take place.

### **1. Human Resources**

Notify employees to complete a self-appraisal and due date.

### **2. Employees**

Completes a self-appraisal, selecting a rating for each competency. If a rating that is above or below “You’re Doing a Great Job” is selected the employee is required to add supporting comments for their rating. Employees rating themselves 4 should provide specific examples to support their rating. (Supervisors will be able to see the employee’s ratings and comments for each competency.) Employees may add goals and/or development plans if desired. A minimum of one goal will be required prior to finalizing the appraisal. Once completed, they will submit their self-appraisal to their immediate supervisor. As part of the performance evaluation process, employees may also be requested to provide a 360 evaluation for another employee(s).

### **3. Immediate Supervisor**

If an employee has had more than one supervisor during the review period, the current supervisor will rate the employee if the employee has been supervised by the current supervisor for more than six months; if the employee has been supervised by their current supervisor for less than six months, then the current and previous supervisor (if still employed with the City) will complete the appraisal together. Identifies and sends invitations to associates and/or direct reports (typically 2-4 City employees at any level that often work with the employee) to provide 360 feedback on the employee. After the 360 feedback has been received and reviewed by the immediate supervisor, the immediate supervisor rates the employee in each competency, providing supporting comments and examples for any rating that is above or below a 3 rating, “You’re Doing a Great Job”. Supervisors shall include 360 comments with discretion (positive and negative) under each of the appropriate competencies, noting that the comments came from a 360 evaluation. The comments should be whitewashed. The immediate supervisor may add goals and/or development plans or wait to complete the goals and/or development plan sections with the employee. A minimum of one goal will be required prior to finalizing the appraisal. The immediate supervisor sends the appraisal to the department head for review, if applicable. The department head has the option to approve the appraisal or send it back to the immediate supervisor for additional comments/consideration. The department head submits the appraisal to Human Resources.

### **4. Human Resources**

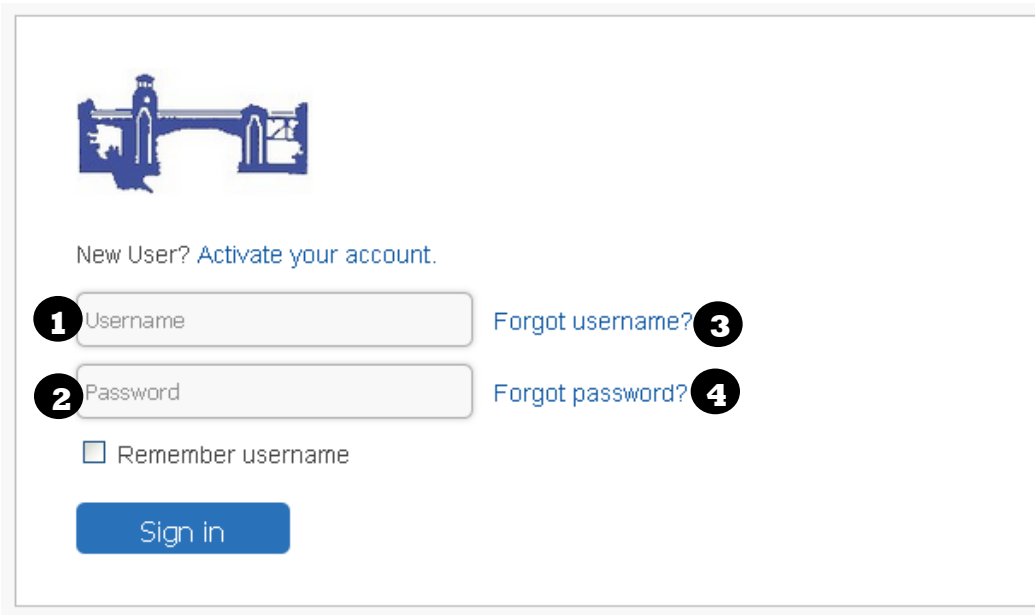
Reviews and approves the appraisal and sends it back to the immediate supervisor to review with the employee. Human Resources has the option to approve the appraisal or send it back to the immediate supervisor and/or department head for additional comments/consideration.

### **5. Immediate Supervisor**

Meets with each employee individually in a private setting to cover the appraisal and create specific performance goals for the upcoming year. (Performance goals need to be measurable and directly related to expectations associated with the role and responsibilities of the employee’s position.)

6. **Employee**  
Sign-off on the appraisal, adding any final comments.
  
7. **Supervisor/Department Head**  
Sign-off on the appraisal.
  
8. **Employees, Co-Workers and/or Department Head**  
Nominate self, co-worker, or direct report for a performance award. A performance award is based on specific or exceptional work performance that exceeded standard expectations during the appraisal period.
  
9. **Pay for Performance Review Team**  
The Performance Award Review Team will consist of the City Administrator along with two supervisors from an outside organization. This team will review all employees recommended for a performance award and decide how performance awards will be distributed.
  
10. **Human Resources**  
Determines merit pay amounts based on the supervisor's rating on the performance appraisal and inform employees of any merit pay and/or performance awards through the pay for performance program.

## Log In



- Go to <https://global.hgncloud.com/cityofdepere/welcome.jsp>
- Enter your user name (1) and password (2) and click “Sign In”
  - You will have 5 attempts to login prior to being locked out. If you are locked out, your account will be frozen for 1 minute.
- When you log in for the first time, you will be required to set up security questions.
- Each time you log in you will be brought to your main page, which displays all your tasks that you need to complete.

## Retrieve Login Information

If you forgot your username\* or password\*\*, you can retrieve your information by clicking the Forgot Username? (3) or Forgot Password? (4) link and following the prompts.

\*All usernames have the same naming convention. The username is your first name and first two letters of your last name. (i.e. Johnathan Smith would be Johnathansm). If you go by a nickname (i.e. John vs. Johnathan), your user ID is your legal name, not the nickname you go by. If you do not have a City email address and cannot determine your username, please contact Human Resources at ext. 1243.

\*\* Default passwords for employees **without** City email addresses will be set to **Password1!** You will be required to change your password when you login. If you are unsuccessful using the Forgot Password link, please contact Human Resources at ext. 1243.

### Password Requirements:

- Minimum password length is 8 characters.
- Passwords must include 1 or more letters.
- Passwords must include 1 or more numbers.
- Passwords must include 1 or more non alpha numeric characters (punctuation).
- You may not re-use your previous 5 passwords.
- Your password will expire every 365 days.
- You may not change your password for a minimum of 3 days once you have changed it.

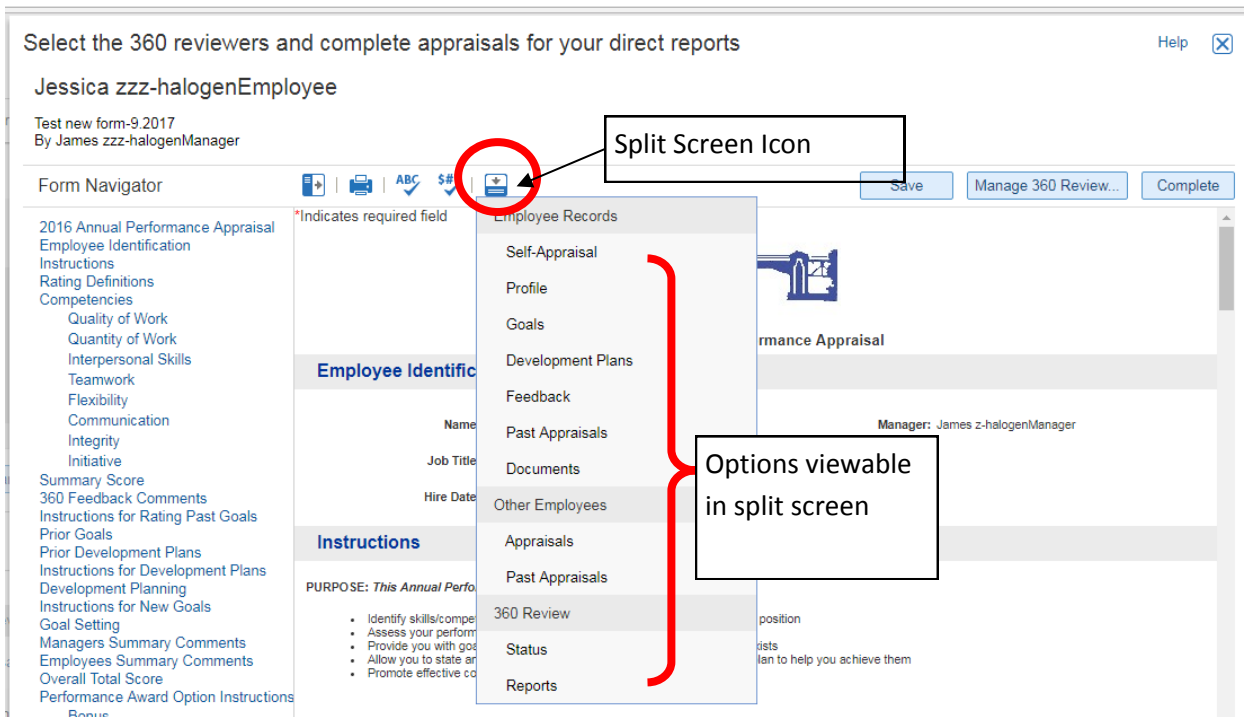
## Complete a Self-Appraisal

- Log into the Halogen website.
- Click on the link “Write your self-appraisal” (box in the top left corner). The self-appraisal form will open.
- Review each competency, selecting the rating that best describes your performance for the appraisal period. Add comments to support any rating that is above or below “You’re Doing a Great Job” (. You should provide specific examples of how you have exceeded expectations for most or all applicable elements of the category.
- You have the option to add goals at the end of the self-appraisal or to add goals while meeting with your immediate supervisor. You will be required to have at least one goal each year.
  - To add a goal, enter in the goal title, specific information about the goal, when you will begin working on the goal, and when you expect to complete the goal. To enter additional goals, click on “Add New Goal” and enter your goal information.
- You will select your preferences for a performance award, should you be nominated for one, during the self-appraisal step.
  - **You must select a preference for each performance award option. If the option is not applicable to you, please select N/A.**
- To complete your appraisal and send it to your supervisor click on “Complete”.
- The system will automatically complete a spelling and grammar check when you click to complete your appraisal. Do not “X” out until the spelling and grammar check are completed.

### Things you should keep in mind....

- You can save your work at any time while completing your appraisal by clicking on the “Save” icon. It is recommended that you save periodically.
- A rating above or below “You’re Doing a Great Job” requires a comment of at least 20 characters. Ratings of “You’re outstanding” should include specific examples. You are encouraged to add comments to support all of your ratings.
- Once you click on “Complete” you are unable to make changes.
- After saving, always make sure it says “Your changes have been saved” before you close out.
- Always click on “Sign Out” to exit Halogen; do not click on the “X” in the upper right of the webpage. Failure to sign out properly may lead to login issues the next time you attempt to login.

## View my Journal Notes, Recognition, Past Appraisals, etc. While Completing a Self-Appraisal



- Log into the Halogen website.
- Click on the link “Write your self-appraisal”. The self-appraisal form will open.
- Click on the split screen icon.
- Select the record you would like to view.
  - If you choose past appraisal you will need to select which appraisal you would like to view then it will appear in the bottom window.
- The record will open.
  - A bar will appear across the middle of the page.
  - Your self-appraisal will remain in the top window.
  - The record you opened will be displayed in the bottom window.
- To close the split screen, click on the “X” within the bar.

### Complete a 360 Review

You will see the 360 Review task on your main page when you log into Halogen. For employees with email, if you are selected to complete a 360 Review you will receive an email from the Human Resources email address informing you that you have been selected.

- Log into the Halogen website.
- Click on the link “Complete 360 Review”.
- Click on “Edit 360 Review” for the employee that you are completing the review for.
- Answer the questions asked, being as specific as possible; provide examples if possible.
- Click “X” to close out.

#### Things you should keep in mind....

- You can save your work at any time while completing your appraisal by clicking on the “Save” icon.
- Spell check is not automatically completed – make sure you spell check prior to completing.
- Once you click on “Complete” you are unable to make changes.

## Sign Off on My Appraisal

After your supervisor reviews your appraisal with you, you can add final comments and signoff on the appraisal by using the “Access employee electronic signature page” link at the top of the appraisal (you will be required to enter your password) or by logging into the Halogen website.

- Log into the Halogen website.
- Click on “Write your final comments if you wish and sign-off your appraisal”
- Enter any final comments in the Employee Summary Comments section at the end of the appraisal.
- Click on “Sign Off”.

### Things you should keep in mind....

- You can save your work at any time while completing your appraisal by clicking on the “Save” icon.
- Once you click on “Electronic Signature” you are unable to make changes.

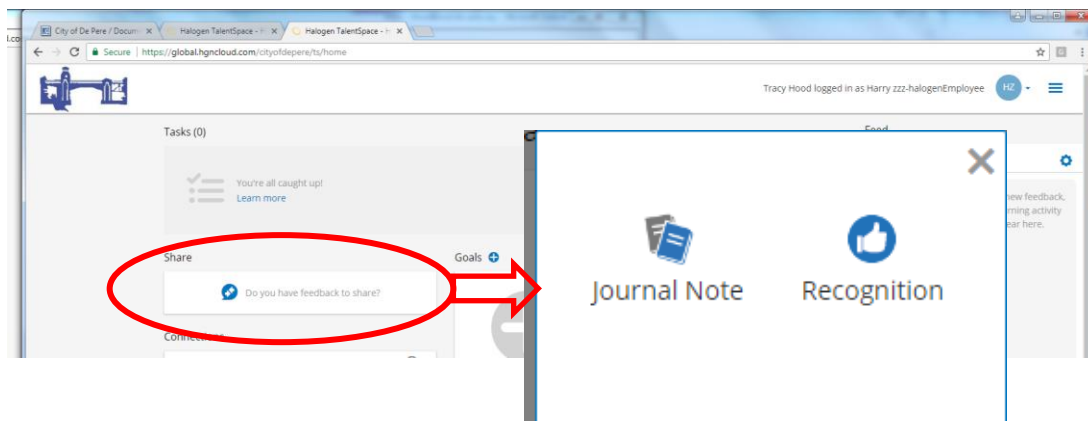
## Add Journal Notes

Journal notes provide an easy way within Halogen to keep a record of milestones, accomplishments, successes, and challenges as they occur, when the details are fresh in your mind. You can add journal notes anytime during the year. You have the option to share journal notes with your supervisor.

- Log into the Halogen website.
- Click on the “Do you have Feedback to Share” in the “Share” box.
- A box will pop up with the options of “Journal Note” and “Recognition”
- Click on “Journal Note”.
- Enter a title for your journal note.
- Enter details in the box under the journal note title.
- If you want to share the journal note with your supervisor, click on the box in front of “Share with management.”
- Click on “Send” to save

### Things you should keep in mind....

- Spell check is not automatically completed – make sure you spell check prior to saving.
- Note to Supervisors: If you add a journal note about an employee, the note stays with you, not the employee. To keep notes with the employee, you will need to add a manager note. (See supervisor section for directions on how to add a manager’s note)



## **Add Recognition**

Recognition can be added as a way to let supervisors know about an accomplishment or positive performance that you, or someone else, have had. Recognition can be added by anyone for anyone. Recognition will be shared with the employee and the employee's supervisor.

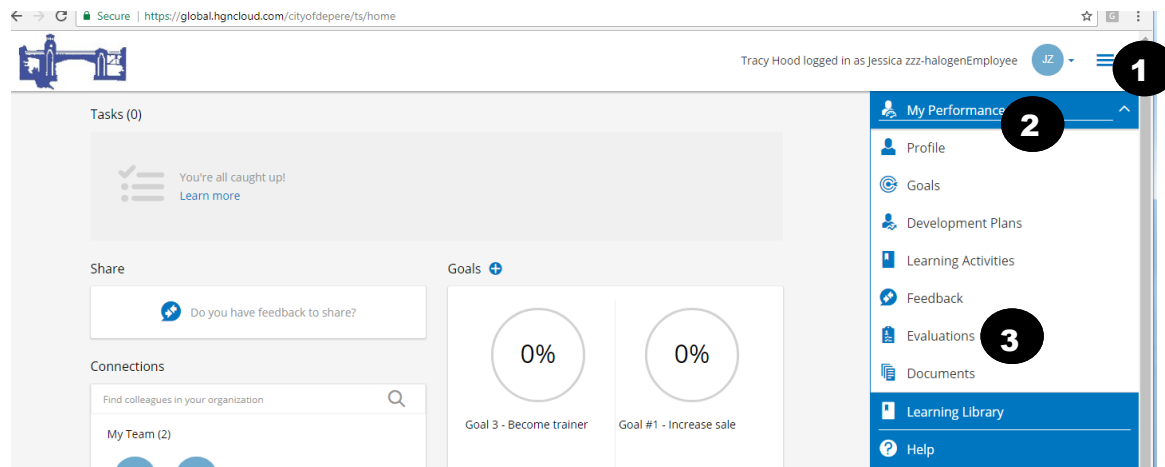
- Log into the Halogen website.
- Click on the "Do you have Feedback to Share" in the "Share" box.
- A box will pop up with the options of "Journal Note" and "Recognition"
- Click on "Recognition"
- Enter who the recognition is for in the box titled "To" (enter your name to add recognition for yourself.) You can enter multiple names.
- Add a subject link
- Add details about the recognition in the box below the subject link.
- Click "Send" to save.

### **Things you should keep in mind....**

- Spell check is not automatically completed – make sure you spell check prior to saving.

## **View my Past Appraisals**

- Log into the Halogen website.
- Click on the menu icon. (1)
- Click on "My Performance" (2) in the menu.
- Click on "Evaluations" (3) in the menu.
- Select the appropriate review period.



## **Update My Goals**

- Log into the Halogen website.
- Click on the menu icon.
- Click on "My Performance".
- Click on "Goals".
- Click on the name of the goal.
- Update the desired field. Fields you can update include:
  - Start Date
  - Due Date
  - Completed Date
  - Status

- Percent Complete
- Progress Flag
- Add Notes
- Click on “Ok”.

**Things you should keep in mind....**

- Once a goal is set, you cannot change the title or description.
- Notes are visible to you and supervisor.

**Upload Documents for Myself**

You can add, view, and delete documents that are relevant to your performance (see supervisor section for information on how to add documents for your employees). For example, you may want to scan a letter of recommendation or an award.

- Log into the Halogen website.
- Click on the menu icon (1)
- Click on “My Performance” (2)
- Click on “Documents” (3)
- Click on “Add”.
- Enter a title for the document in the title box.
- Click on “Browse” to locate the file you want to add. All documents should be in PDF format.
- Click on “Ok”
- 

**Things you should keep in mind....**

- Documents will automatically be viewable by both you and your supervisor.
- If the document is uploaded in a format other than PDF you may not be able to open the document.
- You cannot delete documents added for you by your supervisor.

**View Training Tutorials**

- Log into the Halogen website.
- Under Bookmarks, click on the name of the tutorial you wish to view.
- If required, enter in your first name, last name, and email address. If you do not have an email address, please use [deperehr@mail.de-pere.org](mailto:deperehr@mail.de-pere.org).

**Things you should keep in mind....**

- The system does not keep track of who has viewed which tutorials.



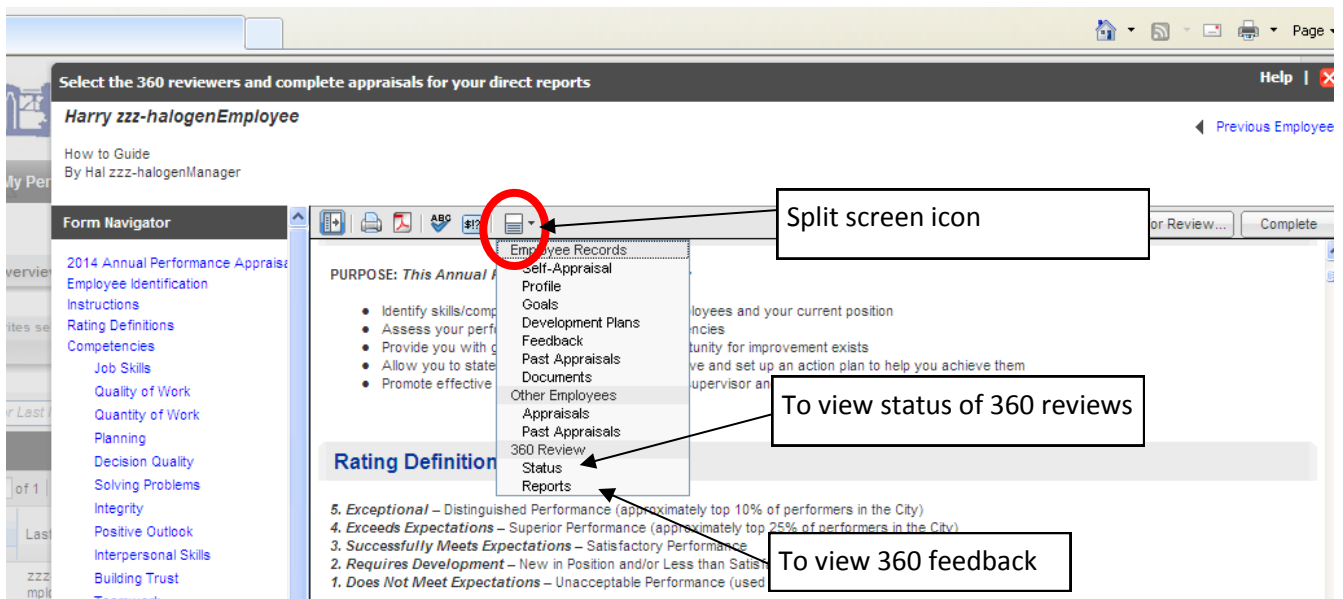
# HOW TO TASKS SPECIFIC TO SUPERVISORS

## Send invitations for a 360 review

- Log into the Halogen website.
- Click on the link “Select the 360 reviewers and complete appraisals for your direct reports”. This will bring you to a listing for all employees that you need to either select the 360 reviewers for or that you need to complete your appraisal for.
- Click on the “Edit Appraisal” link.
- Click on “Launch 360 Review...”
- The 360 review questions will appear on the screen. Click on next to select reviewers.
- You can search by employee name or you can filter by job title, department, or division. Click on search for your results.
- Select the name(s) for the employees you would like to assign to review this employee, select a relationship and click on “Add”.
- Click on “Deploy” to send the request to the employee.
- Click “Ok” to proceed.
- **Please Note:** You should typically select 2-4 City employees at any level that often work with the employee. Try to ensure the same person isn't being selected too often.

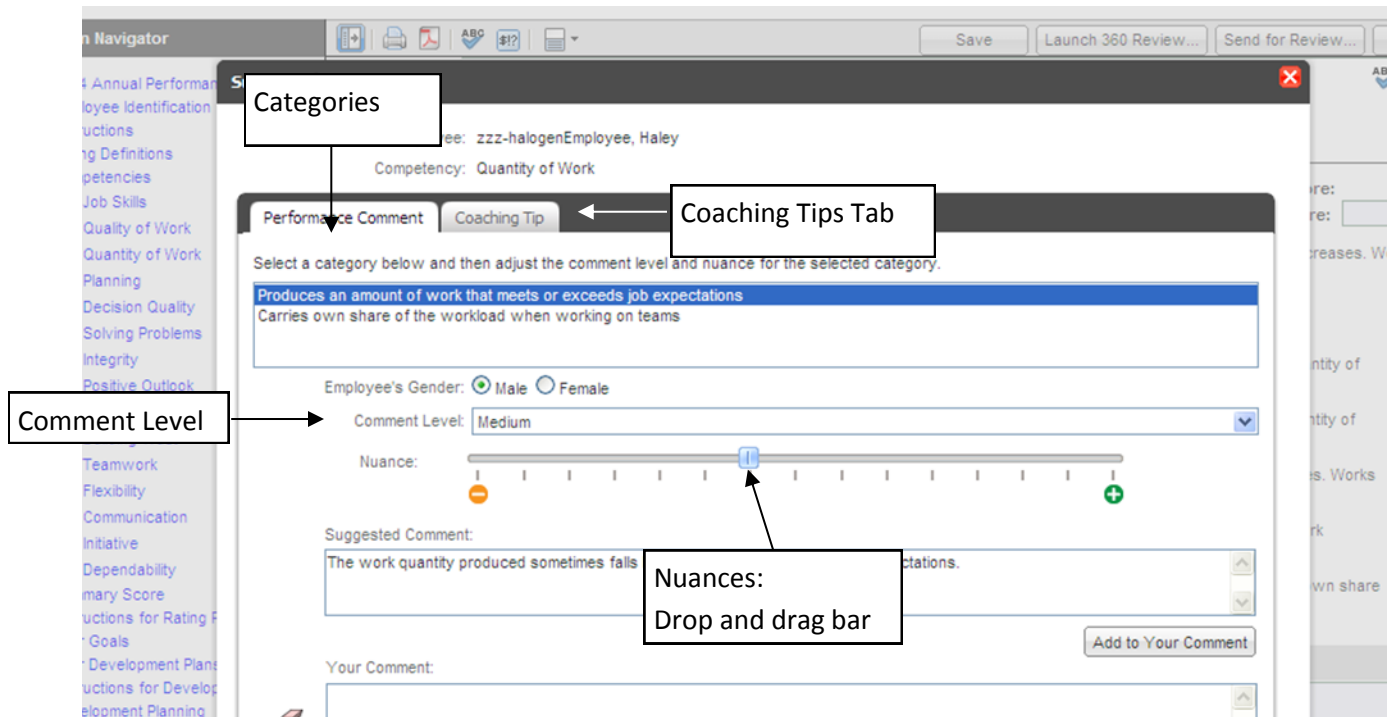
## View 360 Responses

- Log into the Halogen website.
- Click on the link “Select the 360 reviewers and complete appraisals for your direct reports”. This will bring you to a listing for all employees that you need to either select the 360 reviewers for or that you need to complete your appraisal for.
- Click on the “Edit Appraisal” link.
- Click on the split screen icon and select “Reports” under 360 Review.
  - To check the status of 360 reviews click on “Status” under 360 Review.
- **Please Note:** The system doesn't automatically notify you when a 360 response is received. You will need to go in to look.



## Rate an Employee

- Log into the Halogen website.
- Click on the link “Select the 360 reviewers and complete appraisals for your direct reports”. This will bring you to a listing for all employees that you need to either select the 360 reviewers for or that you need to complete your appraisal for.
- Click on the “Edit Appraisal” link.
- Review each competency, selecting the rating that best describes the employee’s performance for the appraisal period. Add comments to support any rating that is above or below “successfully meets expectations” (the middle rating). Specific comments should be made for rating of “You’re outstanding”.
  - To use the comment helper, click on the comment helper icon (the speech bubble with a question mark).
    - Select the category, if applicable.
    - Select the employee’s gender.
    - Select the Comment Level (Most Favorable, Favorable, Medium, Unfavorable, or Most Unfavorable). This is how favorable, or unfavorable, the suggested comments that initially appear, prior to adjusting the nuance, will be. These do not necessarily correlate with our rating scale.
    - Change the nuance (making the comments more or less favorable), if desired.
      - **Please Note:** The comment helper is to assist supervisors in formulating comments for their employee’s appraisal. The comment helper should not be used to determine if the rating selected was appropriate.
    - Click on “Add to your comments”
  - To add coaching tips, while in comment helper click on the “Coaching Tip” tab.
    - Select the category, if applicable.
    - Select the employee’s gender.
    - Select the comment level.
    - Select the coaching tip title.
    - Click on “Add to your comments”
  - Click on “Ok” when you are finished.
  - You have the ability to edit the comments in the comment section to make them more personal.



- You have the option to add goals at this step or to add goals while meeting with the employee. Employees will be required to have at least one goal each year. To add a goal, enter in the goal title, specific information about the goal, when the employee will begin working on the goal, and when you expect the employee to complete the goal. To enter additional goals, click on “Add New Goal” and enter your goal information.
  - **Please Note:** If an employee enters a goal the supervisor should copy the goal information into the goal sections; goals added by employees will not be transferred to the employee’s goals page. If goals are not transferred to the employee’s goal page, the goals will not auto populate for the next appraisal.
- To complete the appraisal and send it to the department head, if applicable, click on “Complete”.

**Things you should keep in mind....**

- You can save your work at any time while completing the appraisal by clicking on the “Save” icon.
- Once you click on “Complete” you are unable to make changes.
- A rating above or below successfully meets expectations requires a comment of at least 20 characters. Ratings of “You’re outstanding” should include specific examples.
- Only goals added by a supervisor will be added to the employee’s goal page.
- After saving, always make sure it says “Your changes have been saved” before you close out.
- Always click on “Sign Out” to exit Halogen; do not click on the “X” in the upper right of the webpage. Failure to sign out properly may lead to login issues the next time you attempt to login.

**2<sup>nd</sup> Level Approver (i.e. Department Head), if applicable**

- Log into the Halogen website.
- Click on the link “Approve appraisals for second level reports”.
- Click on the “Review & Approve” link.
- Review the ratings and comments for each competency.
- You can either approve the appraisal or send it back to the supervisor for additional consideration. If sending it back, you should either add an annotation or talk to the supervisor. (See below on how to add an annotation.)
  - To approve the appraisal click on “Approve”.
  - To send back to the supervisor click on “Send Back to Author”.

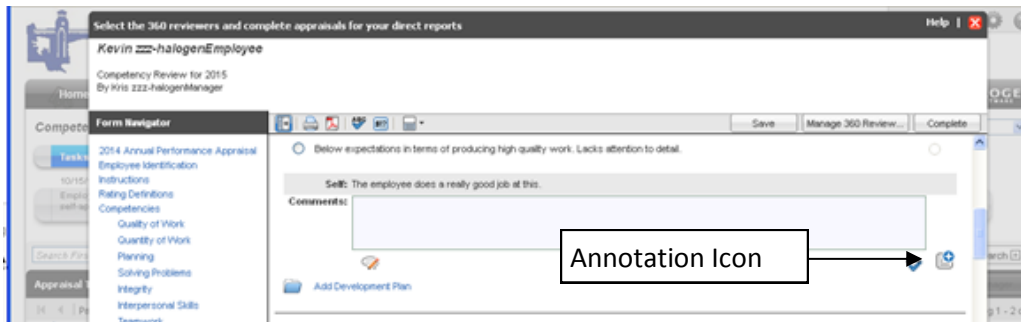
## Add an Annotation

When reviewing or approving an appraisal, you may have a question or comment for the supervisor. Adding annotations allows you to ask questions or provide your comments to the supervisor, and allows supervisors to respond to a question or comment. Annotations are not seen by the employee.

- From the employee's appraisal click on the annotation icon (note paper with a plus on it) by the comments section.
- Annotations will appear in the top box with the most recent annotation first.
- Add your comments in the box titled "New Annotation".
- Click "Ok" when you are finished.

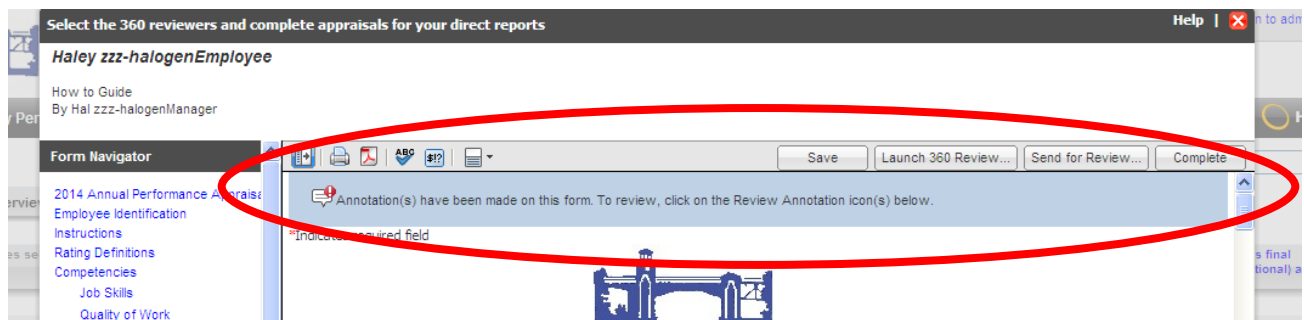
### Things you should keep in mind....

- If you are sending the appraisal back to the supervisor you should add annotations to let them know why you are sending it back or call and talk with the supervisor.
- Spell check is not automatically completed – make sure you spell check prior to saving.
- The supervisor is not notified an annotation was added, only that they have a new task to complete, providing no other employees were already in this step. Therefore, please communicate with the supervisor when you add an annotation.



## View an Annotation

- Log into the Halogen website.
- Click on the appropriate step (i.e. select 360 reviewers.... or approve appraisals....).
- Click on Edit Appraisal (or Review and Approve).
- You will notice a yellow box at the top of the page that informs you this appraisal has an annotation added.
- You will need to open (and read) the annotation by clicking on the dialogue box prior to being able to complete the appraisal.
- A new annotation will be noted with a red exclamation mark next to the annotation icon.



### **Access the Appraisal When Meeting With the Employee**

- Log into the Halogen website.
- Click on “Meet with employee to review performance appraisal and add final comments to your direct reports’ appraisals”.
- Click on “Review & Comment”.
- Review the appraisal with the employee. You may also want to share with them if you are planning on nominating them for a performance award.
- Click on “Complete” after you have met with the employee.
- The employee can add final comments and signoff on the appraisal by using the “Access Employee Electronic Signature Page” link at the top of the appraisal (the employee will be required to enter their password) or by logging into their account at a later time.

#### **Things you should keep in mind....**

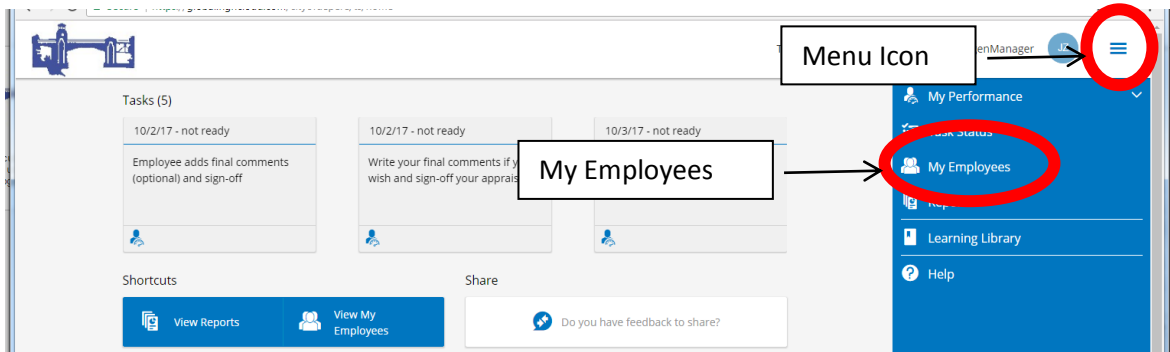
- This is not the supervisor’s final sign off for the appraisal; this is acknowledging that you have met with the employee.
- This is when you can add goals with the employee.
- You can save your work at any time while completing the appraisal by clicking on the “Save” icon.

### **Complete the Final Sign Off on an Employee’s Appraisal**

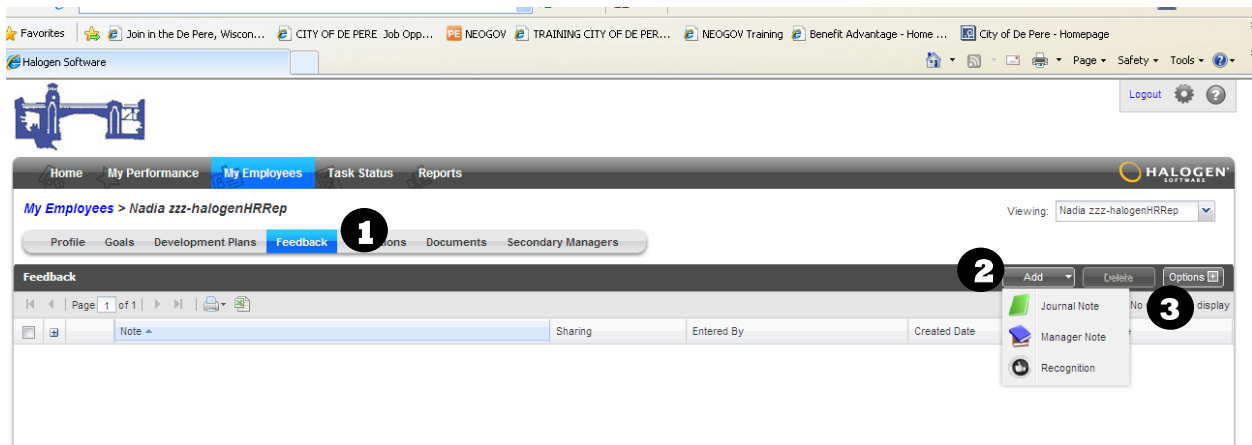
- Log into the Halogen website.
- Click on “Sign-off appraisals for direct reports”
- Click on “View Appraisal” (if you click on Sign Off you will not have an opportunity to view any comments the employee made prior to signing off on the appraisal.)
- Review any comments the employee may have added.
- Click on “Electronic Signature”.

## Add a Manager Note (not as part of the appraisal process)

- Log into the Halogen website.
- Click on the menu icon
- Click on “My Employees” from the menu at the top, right of the screen.



- Click on the name of the employee you want to add a manager note for.
- Click on “Feedback” (1).
- Click on “Add” (2) from the right side of the screen.
- Select “Manager Note” (2).
- Enter an appropriate title for the note.
- Enter in your comments in the box below the title.
- If you want to share the manager note with the employee(s), click on the box in front of “Share feedback with employee”.

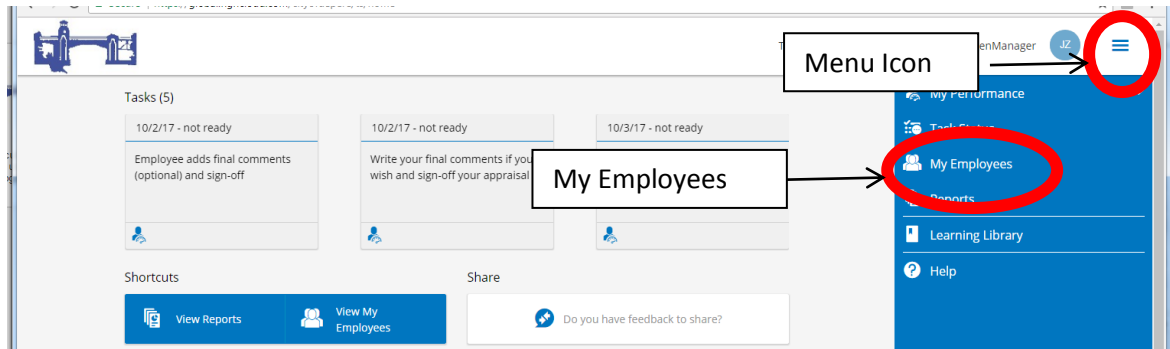


### Things you should keep in mind....

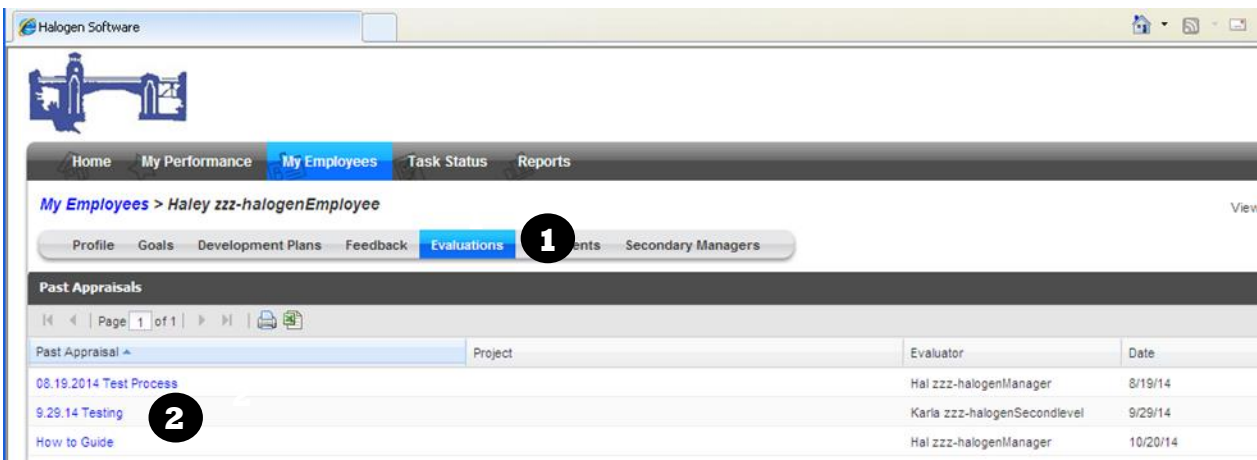
- Spell check is not automatically completed – make sure you spell check prior to saving.
- You can assign the manager note to more than one employee by entering additional names in the find recipient’s box then clicking on their name.
- You can only enter manager notes for employees that report to you.

## View an Employee's Past Appraisal

- Log into the Halogen website.
- Click on the menu icon
- Click on “My Employees” from the menu icon at the top, right of the screen.



- Click on the name of the employee you want to view the appraisal for.
- Click on “Evaluations” (1).
- Click on the appropriate past appraisal process (2).



## Upload Documents for my Employee

You can add, view, and delete documents that are relevant your employee's performance. For example, you may want to scan a letter of recommendation or an award.

- Log into the Halogen website.
- Click on Menu icon ( ≡ )
- Click on “My Employees”.
- Click on the number under the column heading “Documents”. (This number represents how many documents have been uploaded for this employee.)
- Click on “Add”.
- Enter a title for the document in the title box.
- Click on “Browse” to locate the file you want to add. All documents should be in PDF format.
- In the visibility area, click either “Employee and Management” or “Management Only”
- Click on “Ok”.

### Things you should keep in mind....

- When adding a document for one of your direct reports, you have the choice of whether that direct report can view the document.
- If the document is uploaded in a format other than PDF you may not be able to open the document.
- Supervisors can delete employee documents, and employees can delete their own documents. However, employees cannot delete documents added for them by supervisors.