Halogen User Guide

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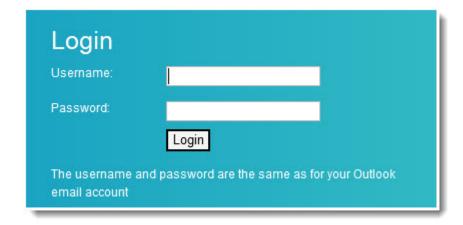
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Logging in to Halogen

Starting a session

Session length is limited to two hours. Once you are logged in, you can remain logged in for two consecutive hours. After two hours, you are automatically logged out.

- 1. Open Halogen ¹.
- 2. Enter your user Outlook name.



- 3. Enter your Outlook password.
- 4. Click Login.

^{1.} https://erp-forms.uottawa.ca/performance/login.aspx

Ending a session

Halogen contains confidential data. As a security measure, you should sign out of Halogen session correctly by clicking *Logout* in the upper right corner of the screen.

1. Click on Logout.



Immediately after logging out, you will be taken back to the login page.

Introduction to Halogen

Introduction

This guide is designed to help you learn how to use Halogen and to act as a reference manual.

Why Halogen?

Halogen is a Web-based application for managing performance through the use of electronic forms and automated processes.

With Halogen, users can:

- 1. Set annual goals, indicate probationary periods, schedule mid-cycle meetings and complete annual performance evaluations for contract and regular staff through the use of forms.
- 2. Access the appropriate forms, based on their user type.
- 3. Automatically manage tasks to be completed, based on their user type.
- 4. Schedule automated email reminders to staff about completing tasks in Halogen.
- 5. Produce reports in real time.

User types

User types are tied to the position a staff member holds.

- 1. Employee: A staff member responsible for completing the goal-setting forms and the semi-annual and annual evaluation forms.
- 2. Supervisor: A staff member with direct-report employees.
- 3. Administrator: A Human Resources employee responsible for managing Halogen.

List of HR Administrators

The HR Administrators of each faculty and service make sure that all steps of the Performance Management and Development Program process meet the deadlines.

They are as well the key contacts for their faculty or service employees wishing to make changes into Halogen.

Organization	Faculty or Service	Nom	Courriel
11	Telfer School of Management	Marc Albert	malbert@uottawa.ca ²
12	Faculty of Arts	Louise Boisvert	<u>Iboisver@uottawa.ca</u> ³
14	Faculty of Education	Céline Morin	celinem@uOttawa.ca 4
15	Faculty of Medicine	Catherine Thibault	cthibau6@uottawa.ca 5
16	Faculty of Health Sciences	Loissa Georges	lgeorges@uottawa.ca 6
17	Faculty of Sciences	Carol Riordan	carol@uottawa.ca 7
18	Faculty of Engineering	Valeriu Jalbu	Valeriu.Jalbu@uottawa.c a
19	Faculty of Social Sciences	Sylvie Desrochers	sdesroch@uottawa.ca ⁸
20	Faculty of Graduate and Postdoctoral Studies	Nathalie Chiasson	nchiass2@uOttawa.ca 9
21	Faculty of Law - Civil Law	Pierre Thibault	pierre.thibault@uOttawa. ca 10
22	Faculty of Law - Common Law	Daria Vatamaniuc	dvatamun@uottawa.ca 11
23	Library	Mylène Lepage	Mylene.Lepage@uottawa .ca 12
24	International Office	Alain Lagacé	alagace@uottawa.ca 13

^{2.} mailto:malbert@uottawa.ca

^{3.} mailto:lboisver@uottawa.ca

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^{7.} mailto:carol@uottawa.ca

^{8.} mailto:sdesroch@uottawa.ca

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^{11.} mailto:dvatamun@uottawa.ca

^{12.} mailto:Mylene.Lepage@uottawa.ca

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Organization	Faculty or Service	Nom	Courriel
25	Center for Continuing Education	Serge Blais	sblais@uottawa.ca 14
26	Human Rights Center	Viviana Fernandez	vfernand@uottawa.ca 15
28	Research Management Services	Enjolie Provost	eprovost@uottawa.ca 16
29	Co-operative Education Programs	Manon Racine	Manon.Racine@uOttawa. ca ¹⁷
30	Office of the Registrar	Lynn-Marie McCarthy	Imccarth@uOttawa.ca 18
31	Financial Aid and Awards	Lynn-Marie McCarthy	Imccarth@uOttawa.ca 19
32	Human Resources	Jennifer Jean Saint- Juste	adminrhrf@uottawa.ca 20
34	Financial Planning	Monique Malo	adminrhrf@uottawa.ca 21
35	Financial Resources	Monique Malo	adminrhrf@uottawa.ca 22
36	Procurement	Monique Malo	adminrhrf@uottawa.ca 23
37	Information Technologies	Chantal Roy	cr22@uottawa.ca ²⁴
38	Teasury and Pension Fund	Nathalie Chiasson	nchiass2@uOttawa.ca 25
39	VRA Financial Resources	Monique Malo	adminrhrf@uottawa.ca 26
40	Physical Resources	Valentin Bachner	vbachner@uOttawa.ca 27
41	Protection Services	Nathalie Watson	nwatson@uOttawa.ca ²⁸

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^{15.} mailto:vfernand@uottawa.ca

^{16.} mailto:eprovost@uottawa.ca

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^{26.} mailto:adminrhrf@uottawa.ca

^{27.} mailto:vbachner@uOttawa.ca

^{28.} mailto:nwatson@uOttawa.ca%20

Organization	Faculty or Service	Nom	Courriel
42	TLSS	Denis Bouchard	dbouchar@uottawa.ca 29
43	Office of Risk Management	James Neusy	jneusy@uottawa.ca 30
44	Food Services	Philippe Demers	pdemers@uottawa.ca 31
45	External Relations	Diane Comtois	dcomtois@uottawa.ca 32
46	CGCE	Nathalie Chiasson	nchiass2@uOttawa.ca 33
51	Community Life Service	Mélanie Morisset	mmorisse@uOttawa.ca 34
52	VRA Student Servives	Nathalie Chiasson	nchiass2@uOttawa.ca 35
53	Housing	Eric Chartrand	echartra@uottawa.ca 36
54	Conventions and Reservations	Philippe Demers	pdemers@uottawa.ca 37
55	SASS	Francine D'Amour	fdamour@uOttawa.ca 38
56	Sports Services	Lucie Laroche	<u>llaroche@uottawa.ca</u> 39
61	University of Ottawa Press	Nathalie Chiasson	nchiass2@uOttawa.ca 40
62	Animal Care and Veterinary Service	Michelle Tyssen	mtyssen@uOttawa.ca 41
70	Office of the Presidents and Vice-Presidents	Nathalie Chiasson	nchiass2@uOttawa.ca 42
71	Office of VP Acad and Provost	Nathalie Chiasson	nchiass2@uOttawa.ca 43

^{29.} mailto:dbouchar@uottawa.ca

^{30.} mailto:jneusy@uottawa.ca

^{31.} mailto:pdemers@uottawa.ca

^{32.} mailto:dcomtois@uottawa.ca

^{33.} mailto:nchiass2@uOttawa.ca

^{34.} mailto:mmorisse@uOttawa.ca

^{35.} mailto:nchiass2@uOttawa.ca

^{36.} mailto:echartra@uottawa.ca

^{37.} mailto:pdemers@uottawa.ca

^{38.} mailto:fdamour@uOttawa.ca 39.

^{40.} mailto:nchiass2@uOttawa.ca

^{41.} mailto:mtyssen@uOttawa.ca%20

^{42.} mailto:nchiass2@uOttawa.ca

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Organization	Faculty or Service	Nom	Courriel
72	Office of VP Research	Nathalie Chiasson	nchiass2@uOttawa.ca 44
73	Office of VP Resources	Nathalie Chiasson	nchiass2@uOttawa.ca 45
74	Office of VP Ext Relations	Nathalie Chiasson	nchiass2@uOttawa.ca 46
75	Office of VP Gouvernance	Nathalie Chiasson	nchiass2@uOttawa.ca 47
84	Strategic Enrollment Management	Lynn-Marie McCarthy	Imccarth@uOttawa.ca 48

^{44.} mailto:nchiass2@uOttawa.ca

^{45.} mailto:nchiass2@uOttawa.ca

^{46.} mailto:nchiass2@uOttawa.ca

^{47.} mailto:nchiass2@uOttawa.ca

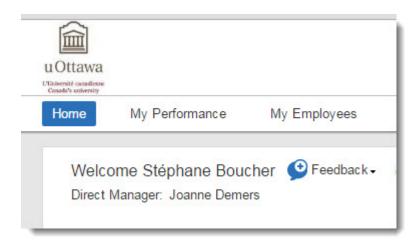
^{48.} mailto:lmccarth@uOttawa.ca

The Halogen interface

Finding your way around

Here are a few helpful hints for finding your way around in Halogen.

1. A top tab highlighted in blue indicates the name of the page you are on.



2. Text in blue indicates a link, which opens in another window.



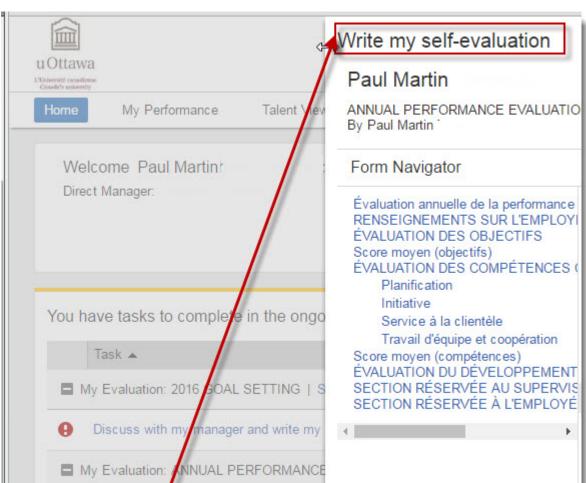
Changing the interface language

This application is available in both official languages, so you can work in the language of your choice.

1. The interface changes to French as soon as you select Français. However, when you change the language you are taken back to the Home page and not to the page you were on when you changed the language.



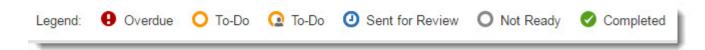
The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account was created.



Tasks

In Halogen, steps to be completed in the ongoing process are considered "tasks." Employees' tasks may be, for example, entering their goals in an online form, and submitting them to their supervisor for review. Supervisors, of course, have a greater number of tasks since they must enter their own goals in addition to reviewing and approving the forms submitted by each employee that reports to them. An icon indicates the status of each task.

Task status icons:



Icon	Meaning
Overdue	Task past due and requires attention.
O To-Do	Task requires your attention but is not past due.
Sent for Review	Task awaiting third party review.
O Not Ready	Task is not ready for your participation.
⊘ Completed	Task is completed and no longer requires your attention.
	Task requiring attention of another user but not past due.

Interface icons

Icon	Function or meaning
0	Links a goal to an organizational goal.
9	Erases a title, description, due date or success indicator of a goal.
%	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
ABC	Starts spell checker. You will be asked to set the language.
₩	Adds a note.
	Expands or collapses the form navigator pane.
	Prints the form.
Z	Creates a PDF version of the form.
\$#3	Built-in language checker reviews text for any offensive or potentially embarrassing words or statements and suggests alternatives.
	Split screen function.

Icon	Function or meaning
×	Closes the form.

Help

Online help is available in Halogen. Simply click *Help* in the upper right corner.



The form navigator pane

Each form (performance evaluation, goal setting, end of probationary period, mid-year evaluation, etc.) has multiple sections. The form navigator pane allows you to easily and quickly move between sections.

The form navigator pane appears to the left of the form. You can use either the form navigator or the scroll bar to move from one section of a form to another, although the navigator pane allows you to do so more quickly.

Discuss with my manager and write my goals Stéphane Boucher

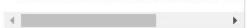
2013 GOAL SETTING - TESTING By Stéphane Boucher

Form Navigator



Client service orientation

Teamwork and cooperation DEVELOPMENT PLAN FOR THE YEAR



GOAL SETTING DISCUSSION MEETING

Definition:

Goals are specific results that we seek to achieve. supervisor and the employee. To ensure that ever about the S.M.A.R.T.).

Instructions:

We suggest you identify between three and five go University of Ottawa strategic goals outlined in Des

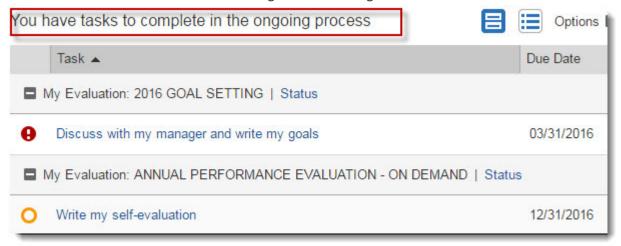
- In the first text box, write the goal title.
 In the second text box, describe the goal in detail

Main functions

Tasks to complete

The You have tasks to complete in the ongoing process pane provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

Users can display these tasks in grouped view, task view or in a single list. In addition, each column can be sorted in ascending or descending order.



This pane also displays the status and due date of tasks.

Users will usually receive an email indicating a task has to be started or completed. The email message can also include the user's log-in name, temporary password and a link to launch Halogen. Once logged in, the user sees a quick overview of any tasks requiring action.

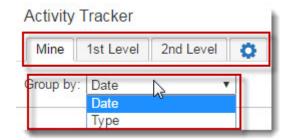
When a given process is complete and the supervisor has signed the form off, Halogen posts the form in the Evaluation section of the My Performance page.

Activity tracker

The activity tracker pane appears on the right-hand side of the home page. It lists journal notes, appraisals and documents that have been updated in My Performance. Items can be sorted by date (newest to oldest) or by type.

1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.

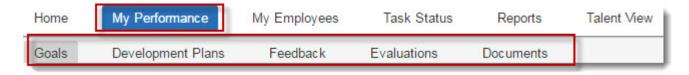
- 2. The group of tabs that displays in the activity tracker depends on the user type.
 - a. Employees: Mine.
 - b. First-level supervisors: Mine and 1st level.
 - c. Second-level supervisors Mine, 1st Level and 2nd Level.
- 3. Activities in the Mine tab can be grouped by date or type.
- 4. Activities of direct reports can be grouped by date, type or employee.



My Performance

My Performance

My Performance is a centralized portal where a user can access and update performance information in the following sections:



- Goals
- Adding a development plan
- Adding a journal note
- Evaluations
- Documents

Supervisors have access to these same five sections in the My Employees page.



Important:

If you add goals or development plans in My Performance, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

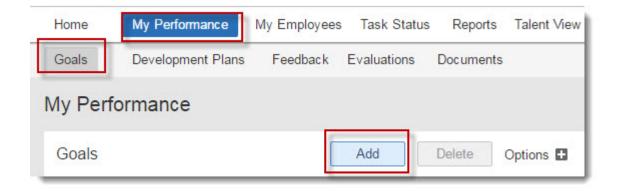
Adding a goal

A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals entered in the goal setting form will appear in this section once the goal setting process has been completed.

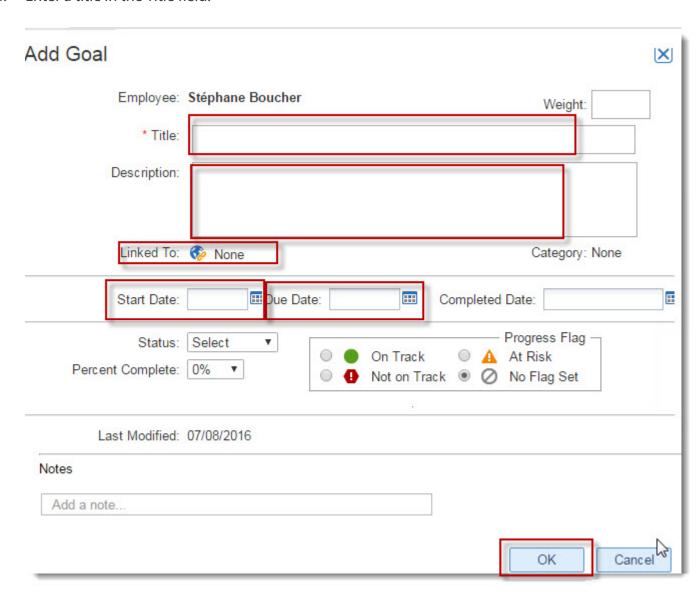
- 1. Supervisors: click My Employees and then the name of the employee for whom a goal is to be added.
- 2. Click Goals.

NB: The objectives you added will not be kept in the goal setting form that you completed at the beginning of the cycle.

3. Click Add.



4. Enter a title in the Title field.

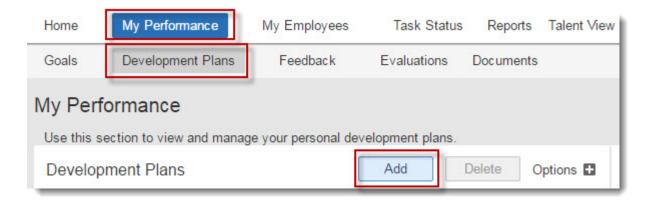


- 5. Provide a detailed description of the goal in the Description field.
- 6. Click on the calendar icon next to the Start Date field and select a start date.
- 7. Click on the calendar icon next to the Due Date field and select a due date.
- 8. Click OK.

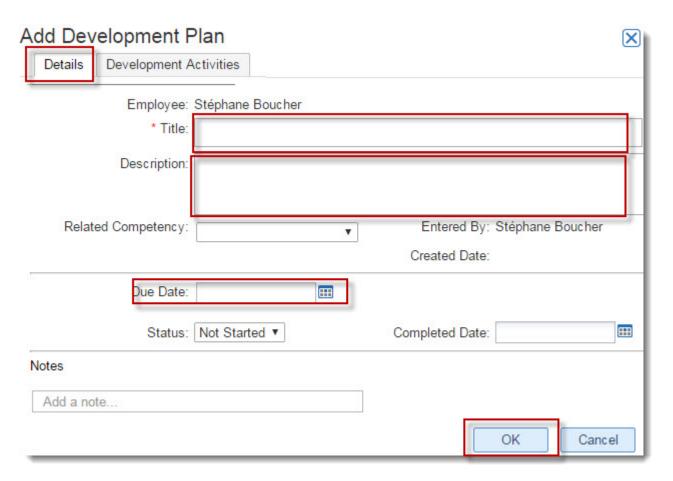
Adding a development plan

A development plan added here will not be added to the goal setting form completed at the start of the cycle.

- 1. Supervisors: click My Employees and then the name of the employee for whom a development plan is to be added.
- 2. Click Development Plans.
- 3. Click Add.



4. Enter a title in the Title field.



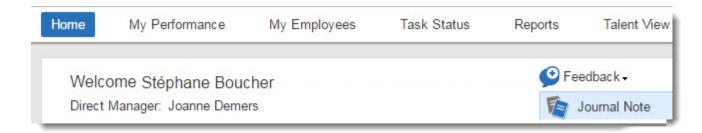
- 5. Provide a detailed description of the development plan in the Description field.
- 6. Click on the calendar icon next to the Due Date field and select a due date.
- 7. Click OK.

Adding a journal note

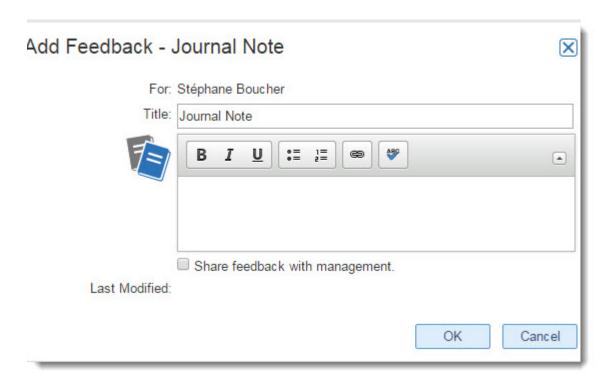
Employees can use the journal notes section to track their achievements during the year, which can be helpful at evaluation time. For example, a journal note could be added to note registrations increased by 2 %.

1. Click on Feedback and then the name of the employee for whom a journal note is to be added.

2. Click Journal Notes.



3. Enter a *title* for the note in the Title field.



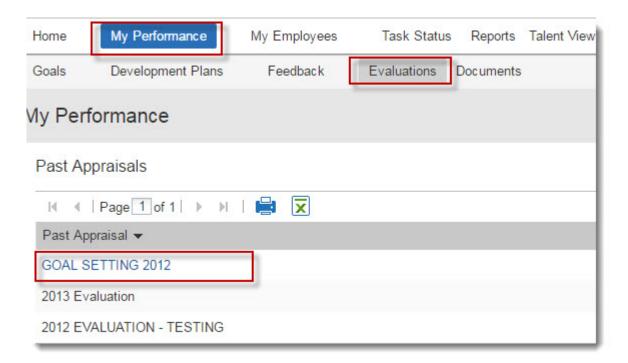
- 4. Enter the journal note details in the Description.
- 5. Employees who arrived at this section through the My Performance page can check the box next to Share feedback with management if they wish to allow their supervisor to see this note. Supervisors who arrived at this section through the My Employees page can check the box next to Let the employee view this note if they wish to allow their employee to see this note.
- 6. Click OK.

Evaluations

Supervisors may review their own forms and evaluations as well as those of their employees at any time. This allows supervisors to monitor both personal and employee progress.



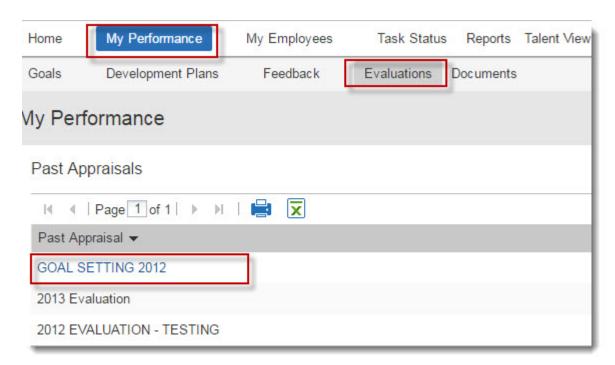
Past appraisals and goal settings forms have not been imported into Halogen. Therefore, 2012 is the first annual performance evaluation cycle to be recorded in Halogen. Once the 2012 goal setting process is complete, this form will appear in the Evaluations section.



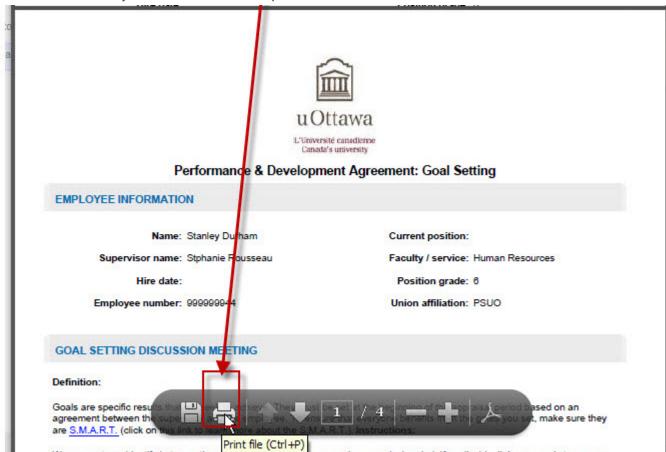
Print a completed form

- Click the Ma Performance tab.
- Click the Evaluations tab. 2.

3. Click on the name of the form to be printed in order to create a PDF document.



- 4. Once the PDF form appears, place your curser at the bottom of the document to view the translucent Adobe toolbar.
- 5. Click on the printer icon on the toolbar.



6. Click *Print* to send your document to the printer.

Adding a document

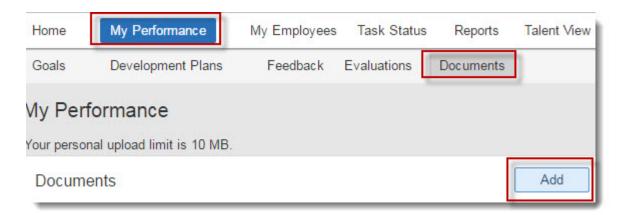
Employees can add, consult and delete performance-related documents for themselves. Supervisors can add, consult and delete performance-related documents for themselves and their employees.

Supervisors can set document visibility parameters (access) for any documents they add for an employee by selecting the Employee and Management or the Management radio button.

Users can add documents with the following filename extensions:

- .PDF
- .DOC
- .DOCX

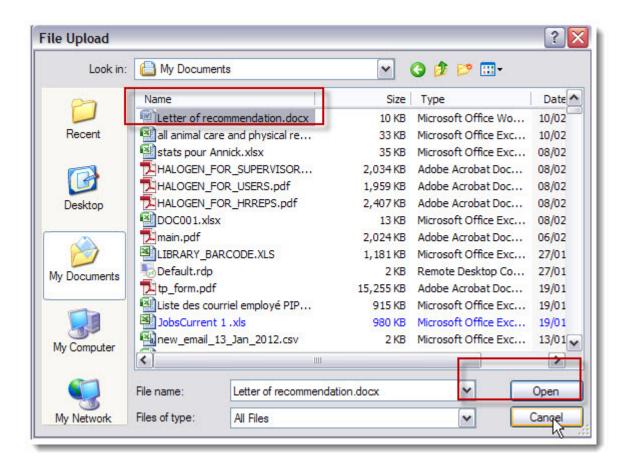
- .TXT.
- .XLS
- .XLSX
- .JPG
- .GIF
- .BMP
- 1. Click the Documents tab.
- 2. Click Add.



- 3. Enter a title for the document in the Title field.
- 4. Click Browse.



- 5. Locate and click on the document to be added.
- 6. Click Open.



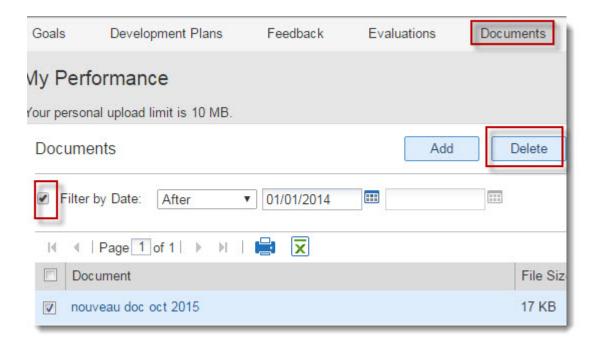
7. Click OK.

Deleting a document

You can delete a document from the Documents section.

1. If you are a supervisor, click My Employees and then the name of the employee whose document is to be deleted.

2. Click the Documents tab.



- 3. Put a checkmark in the box next to any documents to be deleted.
- 4. Click Delete.
- 5. Click OK.



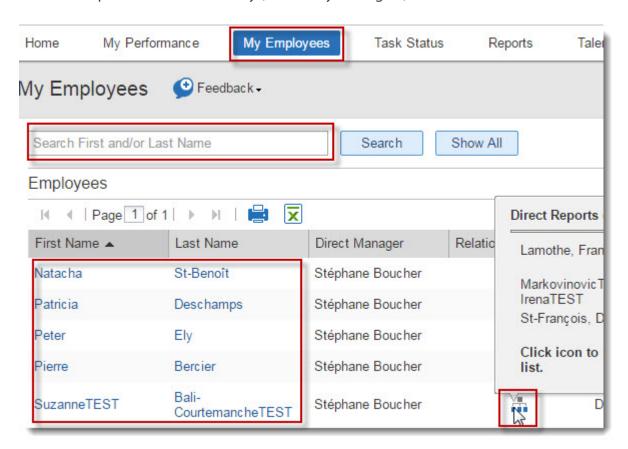
My employees

Supervisors have access to the My Employees area, which provides a list of all direct report employees and their records.

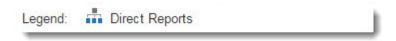
Supervisors responsible for many employees can enter a full or partial employee name in the search box, use the advanced search function or activate a list filter.

A supervisor can set the filter to show the records of Direct Reports or All Reports. Therefore, supervisors can view:

- 1. Employees who report directly to them.
- 2. Employees who report directly to them and that employees direct reports.
- 3. The My Employees section uses icons to indicate which employees have other employees reporting directly to them and/or which employees report two more than one supervisor simultaneously (secondary managers).



The icon legend appears at the bottom of the My Employees page.

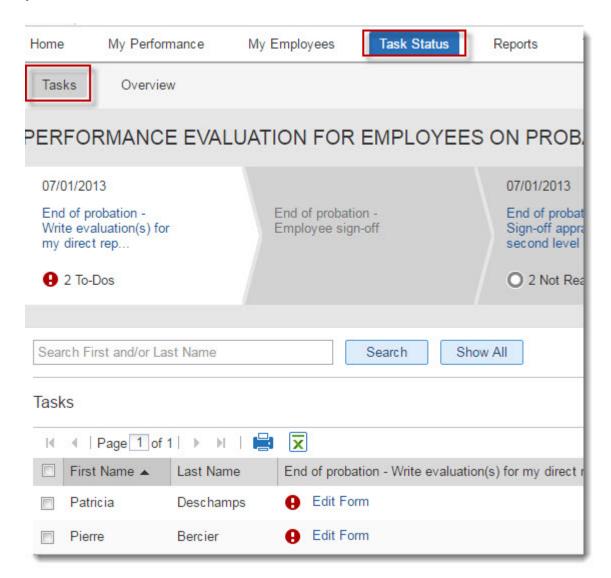


Task status

This section allows supervisors and Human Resources administrators to consult their own tasks and their employees' tasks.

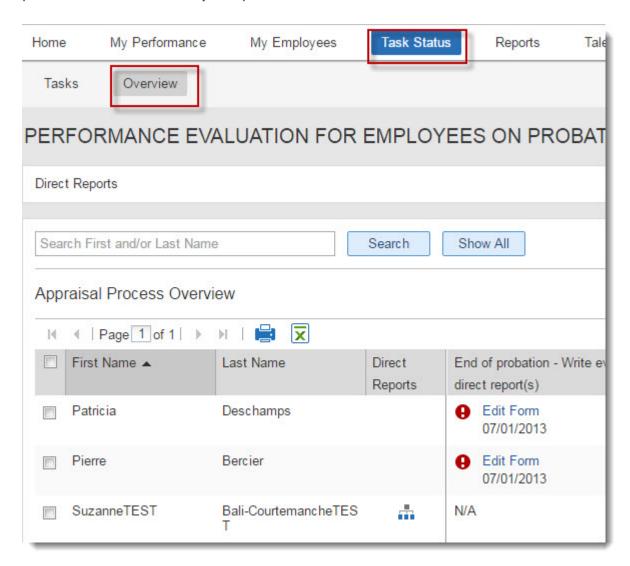
Supervisors and administrators can view the details for an individual step in the process or an overview of the tasks for all process steps.

Note, however, that the overview is available only for the supervisors and administrators responsible for a particular process and the employee involved in the process.



The overview display shows where each of the reports is in the process.

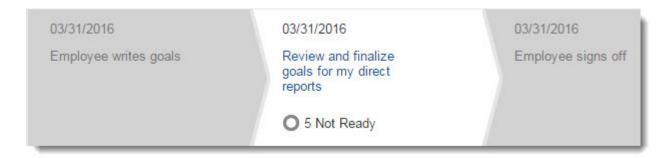
The example below shows that three employees have to complete the goal setting process and one has already completed it.



Goal setting

Setting goals

The process of setting goals is broken down into tasks done by either the employee or the employee's supervisor.



Start of the goal setting process: The supervisor schedules a meeting with the employee to set goals for the coming year, to identify the behaviours necessary to maintain or improve performance levels in each competency and to draw up a development plan that will allow the employee to achieve their goals and reach the required competency levels.

The employee must:

- 1. Enter the date of the meeting with the supervisor.
- 2. Add up to five goals
- 3. Enter the specific behaviours for each competency necessary in order to maintain or improve performance levels in each competency over the next evaluation period.
- 4. Enter a development plan.
- 5. Save the draft form (can be modified up until it is submitted for approval).
- 6. Submit the form for approval. The employee can no longer modify the form.

The supervisor must:

1. Review and finalize the employee's draft form. At this step, the supervisor can write directly in the form to make necessary changes.

- 2. If necessary, add comments to key competencies.
- 3. If necessary, add comments to the development plan.
- 4. Save the form.
- 5. Complete the form

End of the goal setting process

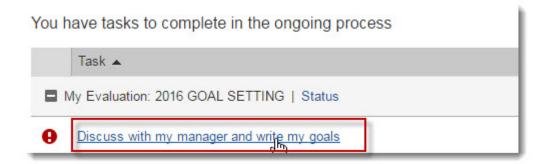
The employee approves the goal setting form. The form is now marked completed.

Meeting to discuss goals

The first step in completing an annual evaluation is the employee–supervisor meeting in order to establish goals. Once the meeting has taken place, the employee drafts personal goals in Halogen.

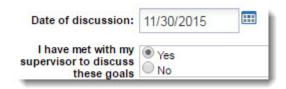
Drafting goals (employees):

1. Click Discuss with my manager and write my goals.



2. Once the goal setting form opens, click the calendar icon in the meeting section, next to the Date of discussion field and select a meeting date

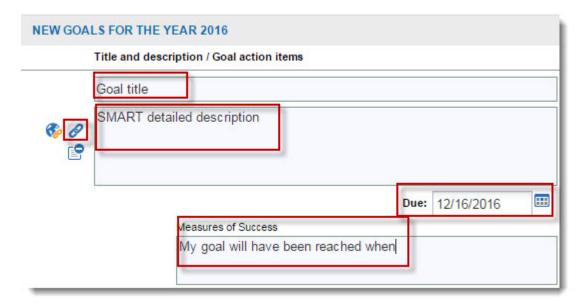
3. Select Yes to confirm that the meeting was held and that the goals were discussed with the supervisor.



Adding a goal

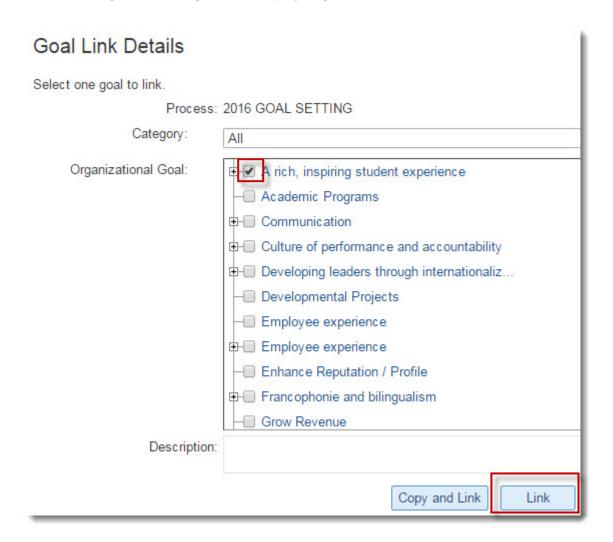
All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading Title and description / Goal action items, type the title of the first goal.



- 2. In the second box, type a detailed description of the goal.
- 3. Click the calendar icon next to the Due box and select the required date.
- 4. In the Measures of successs box, type one or more indicators.

- 5. Click the chain link icon to link the goal to an organizational goal.
- 6. Select one organizational goal the employee goal is to be linked to.



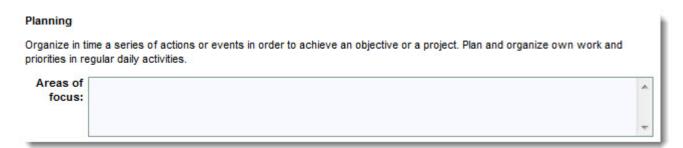
- 7. Click Link.
- 8. Click Add New Goal to add a goal.



Linking behaviours to key competencies

The key competencies section is for recording the behaviours an employee must adopt or maintain in order to improve or remain at their level of performance for each of the four competencies. When a supervisor opens a form submitted by an employee, the supervisor is able to make changes to the form. Next section describes the steps for an employee to record behaviours.

1. In the Areas of focus box, the employee describes a behaviour that will help them acquire, maintain or improve their level for a given competency.



2. Click Add Anotation to attach any comments.



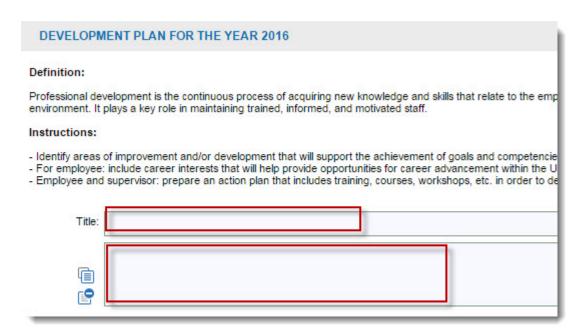
3. Repeat steps 1 and 2 for each of the other competencies.

Adding a development plan

Employees and supervisors can use the development plan section to describe possible training activities that would provide the employee with opportunities for career advancement or help the employee improve their skill level. The development plan can

be completed by either the employee or the employee's supervisor. To add a development plan, follow the steps below.

1. Give the development plan a title.

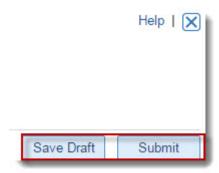


2. Enter a description of the proposed training activity.

Saving the draft version

Click Save Draft furthering order to save the form and continue editing. When you have finished entering your plan(s), click Submit. The form can now be viewed but not changed and is submitted to the supervisor for review and approval.

1. Click Save Draft.



2. Click OK

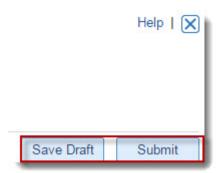


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Submitting a form for approval

Once there are no further changes to make to the form, it is submitted to the employee's supervisor for review and approval. A supervisor cannot view the form until the employee has submitted it for review and approval.

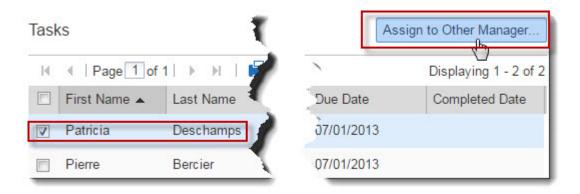
1. Click Submit once there are no more changes to be made to the form.



Reviewing and approving goals

A supervisor can see on the Home page in the You have tasks to complete in the ongoing process section if there are forms to approve. The supervisor must then:

- Click Review and finalize goals for my direct reports.
 The following sub-steps can be done if the employee needs to be assigned to a different supervisor. If you do not need to assign the employee to another supervisor, go directly to step 2.
 - a. Put a checkmark next to the name of the employee whose form must be assigned to another supervisor.
 - b. Click on Assign to Other Manager.

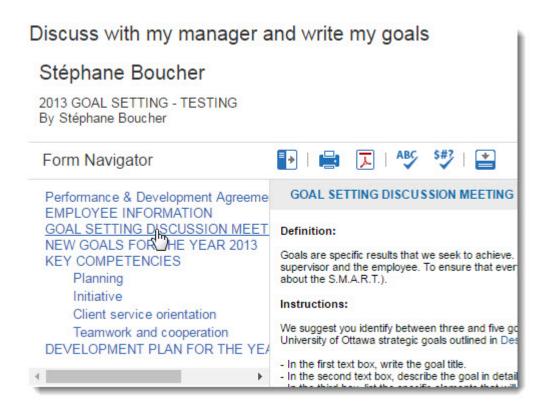


2. Click Edit Form.

Halogen opens the employee's completed form and the supervisor can modify it.

3. In the form navigator, click Goal Setting Discussion Meeting.

Make sure the meeting date has been entered and that the employee has selected Yes next to I have met with my supervisor to discuss these goals.



- 4. Click New Goals and confirm that the goals match what was agreed upon with the employee. If not, enter the necessary modifications.
- 5. Click Key Competencies and confirm that the notes added match what was agreed upon with the employee. If not, enter the necessary modifications.
- 6. Click Development Plans and confirm that the notes added match what was agreed upon with the employee. If not, enter the necessary modifications.
- 7. Click on Save Draft to save the form.
- 8. Click on Approve to send the form back to the employee for the employee's final sign-off.
- 9. Click X in the red box to close the form.

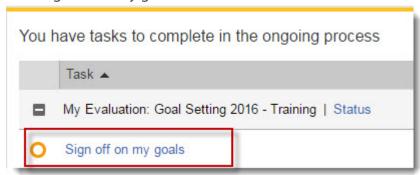
10. (Optional) Click Next Employee (if there is more than one employee whose form needs to be reviewed and approved).



Employee final approval

Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

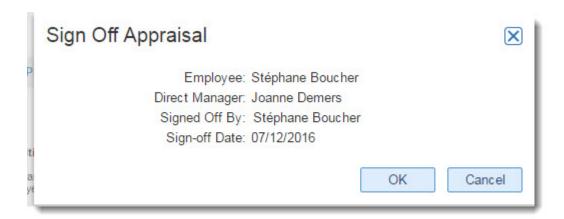
1. Click Sign off on my goals.



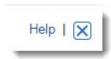
- 2. Click on OK.
- 3. Click on Sign Off.

If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.

4. Click on OK.



5. Click on the X to close the form.



Self-appraisal Process

Annual Appraisal Process

1. The year-end process contains many steps that must be completed successively by the employee, the supervisor, the second-level supervisor of the unit.

Employee writes selfevaluation

Write evaluations for my direct reports

Add comments to my second level reports' my direct reports

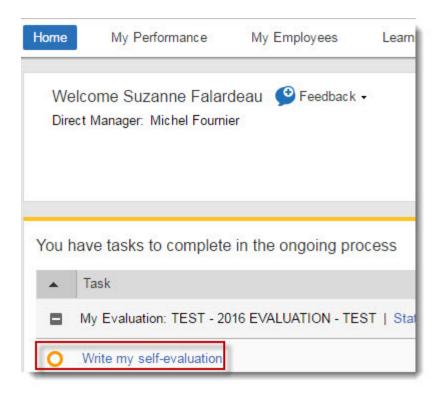
evaluations

Add comments to my second level reports' my direct reports

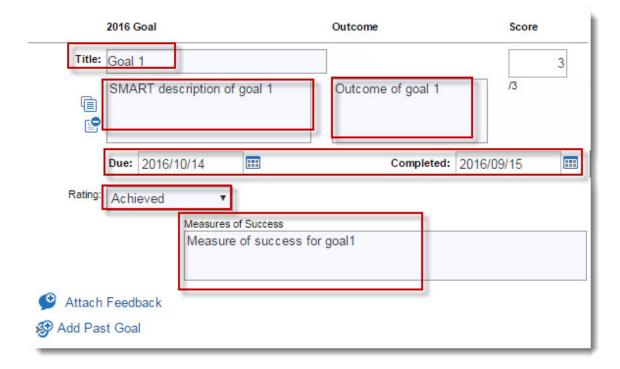
evaluations

- a. Employee write his/her self-evaluation
- b. Supervisor revises/writes evaluation, consults with the second-level supervisor and discusses with the employee
- c. Second level super visor adds comments
- d. Supervisor signs-off the evaluation
- e. Employee signs-off
- The self-appraisal form finalizes the appraisal cycle. This form must be completed by all employees. It is in this form that scores for objectives and competencies are entered.

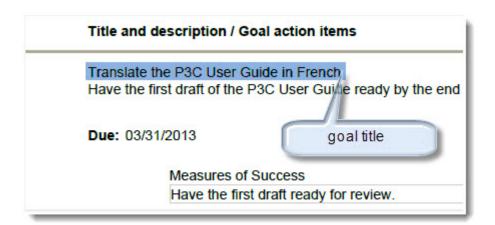
3. The self-appraisal form is available from the Home tab and you must click on Write my self-evaluation to begin the process.



4. The self-appraisal form allows you to enter goals if you have not previously completed the goal setting form. To enter goals you must click on Add Past Goal. However, if you have completed the goal setting form or you have entered goals and/or development plans using the My Performance tab, they will automatically be imported in the self-appraisal form.



- 5. If you have filled the goal setting form **but your supervisor has not opened the form**, your goals, competencies and development plan **will have not been added to the annual appraisal form**. It is possible to copy and paste the content of your goal setting form into the annual appraisal form. The following steps explains how to do this.
 - a. Click on My Performance tab
 - b. Click on Evaluations tab
 - c. Click on Goal Setting.
 - d. Simultaneously press on the following keyboard keys **SHIFT CTRL S** to be able to save your form on your desktop
 - e. Select the directory where the file needs to be saved and write a name of your document.
 - f. Close the PDF form opened with Halogen by clicking on the red box with the X located in the upper right section of the form.
 - g. Click on the Halogen Home tab.
 - h. Click on Write my self-evaluation to open the annual appraisal form.
 - i. Open the PDF form that you have saved on your desktop.
 - j. Go to the goal section of your PDF form and select the goal Title and on *CTRL C* on the keyboard.



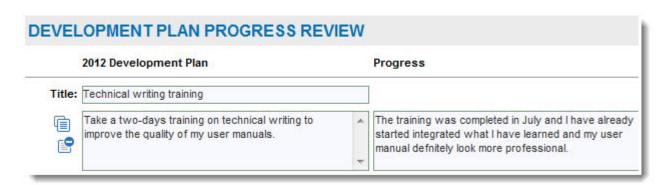
k. On the evaluation form of Halogen, bring the cursor in the box where the goal title must be typed and simutaneously press on *CTRL V* to insert the goal title.



6. The self-appraisal form allows you to enter notes in the key competencies if you have not previously completed the goal setting form. However, if you have added notes to the competencies section when you filled the goal setting form, they will automatically be imported in the self-appraisal form.

	Assessment	Rating Scale	Score:
Planning Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.		Meets the Competency ▼	3
Initiative Demonstrate creativity and initiative to suggest improvements and encourage positive results. Be proactive and self-starting. Show availability and willingness to go above and beyond expectations whenever possible.		Meets the Competency ▼	3
Service Excellence Reflect a positive attitude, demonstrate competence and professionalism, treat members of the community with respect, exercise care, devote full attention and find solutions. (Visit the section "Useful links" on the home page to read the detailed definition)		Meets the Competency ▼	3
Teamwork and cooperation Cooperate and work well with other members of the team to reach common goal. Accept and give constructive feedback. Adjust own behaviour to reach team goals.		Meets the Competency ▼	3

7. The self-appraisal form allows you to enter a development plan if you have not previously completed the goal setting form. However, if you have completed the goal setting form or you have added development plans from the My Performance tab, they will automatically imported in the self-appraisal form.



8. If the rating scale of at least one competency equals Needs improvement, the supervisor *must* complete the PDF form titled **PIP** (performance improvement plan). The supervisor *must* send an email to <u>performance@uottawa.ca</u> ⁴⁹ to obtain the PIP form. Once the form is completed and signed by the supervisor and then signed by the employee, the PIP form must be send to Human Resources by email to <u>performance@uottawa.ca</u> ⁵⁰. The supervisor **must also** add the PIP in the Documents tab on My Performance. Refer to *Adding a document* section of the present guide on how to import a document in Halogen.

Steps for the self-appraisal process

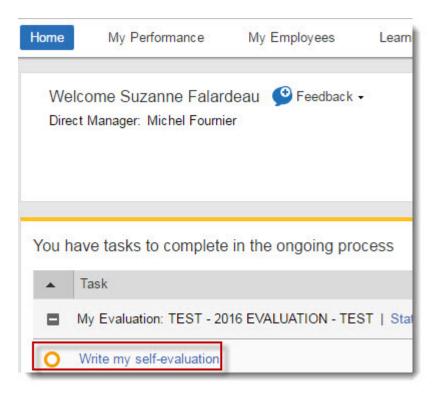
All employees must complete the self-appraisal form in order to complete the annual performance appraisal process. If you have completed the goal setting form or if you have entered your goals and development plans in the My Performance tab, they will

^{49.} mailto:performance@uottawa.ca

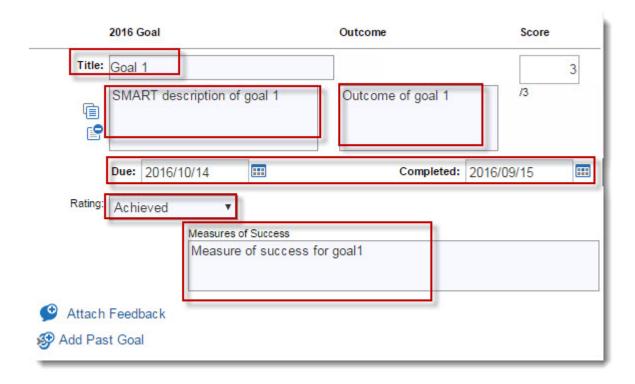
^{50.} mailto:performance@uottawa.ca

appear in the self-appraisal form. However, if yo have not yet entered goals for this year, you will be able to enter them in the next steps.

1. Click on Write my self-evaluation.



2. (Optional) Type a goal title in the box Title.



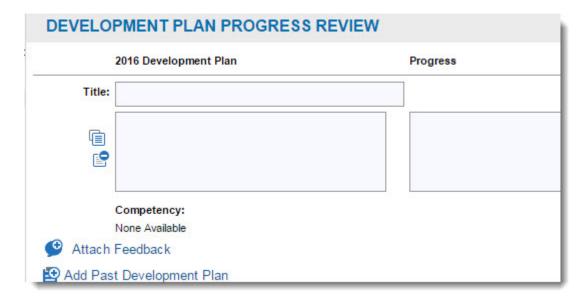
- 3. (Optional) Type a detailed description in the box under the goal Title.
- 4. (Optional) Type a comment in the box Outcome.
- 5. Enter the date when the goal was achieved in the box Completed.
- 6. Select the goal Rating.
- 7. (Optional) Type a Measure of Success.
- 8. (Optional) Click on Add Past Goal and redo steps 2 to 7 if you need to add a goal that has not been entered in the Goal setting form or in the My Performance tab.

9. (Optional) Type a note in the Assessment box of the Planning competency.

	Assessment	Rating Scale	Score:
Planning Organize in time a series of actions or events in order to achieve an objective or a project. Plan and organize own work and priorities in regular daily activities.		Meets the Competency	3
Initiative Demonstrate creativity and initiative to suggest improvements and encourage positive results. Be proactive and self-starting. Show availability and willingness to go above and beyond expectations whenever possible.		Meets the Competency	3
Service Excellence Reflect a positive attitude, demonstrate competence and professionalism, treat members of the community with respect, exercise care, devote full attention and find solutions. (Visit the section "Useful links" on the home page to read the detailed definition)		Meets the Competency	3
Teamwork and cooperation Cooperate and work well with other members of the team to reach common goal. Accept and give constructive feedback. Adjust own behaviour to reach team goals.		Meets the Competency	3

- 10. Using the Rating Scale scroll list, select the achieved level of the Planning competency.
- 11. (Optional) Type a note in the Assessment box of the Initiative competency.
- 12. Using the Rating Scale scroll list, select the achieved level of the Iniative competency.
- 13. (Optional) Type a note in the Assessment box of the Client service orientation competency.

- 14. Using the Rating Scale scroll list, select the achieved level of the Client service orientation competency.
- 15. (Optional) Type a note in the Assessment box of the Teamwork and cooperation competency.
- 16. Using the Rating Scale scroll list, select the achieved level of the Teamwork and cooperation competency
- 17. (Optional) Type a Development Progress Review in the box.



- 18. (Optional) Type a detailed description in the box under Title.
- 19. (Optional) Type a comment in the Progress box.
- 20. (Optional) Type a comment related to your performance in the Employee's Comments box (you can also wait to enter your comment when you give your final approval to the appraisal).
- 21. Click on Save Draft to save your form (especially if you still want to modify it later before submitting it to your supervisor).
- 22. Click on Submit when you are ready to send your form to your supervisor.
- 23. Click on OK to confirm that you no longer need to modify the form.

Revision of the self-appraisal by the supervisor

1. Once the self-appraisal form has been submitted by the employee, it is assigned to the supervisor.

2. This step is started on the Home tab by clicking on Write evaluations for my direct reports.

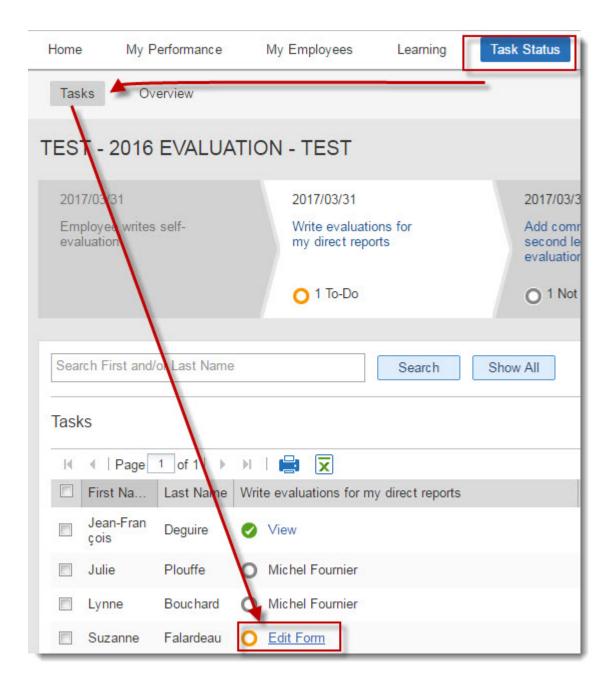
Employee writes selfevaluation

Write evaluations for my direct reports

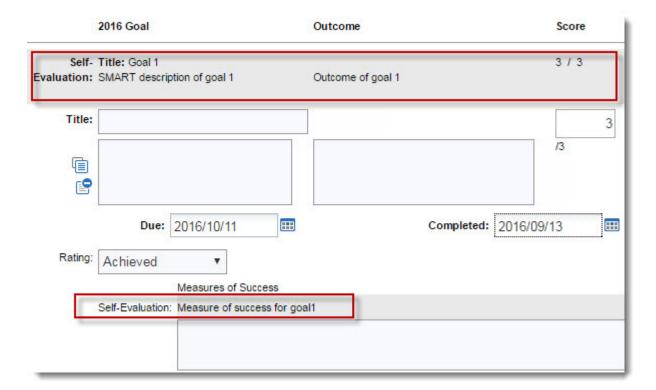
Add comments to my second level reports'
evaluations

Sign-off evaluations for my direct reports
my direct reports
evaluations

3. As soon as the supervisor clicks on Write evaluations for my direct reports, the Task Status opens and the supervisor can see at which step of the process he or she currently is. The supervisor clicks on Edit Form to begin the step.



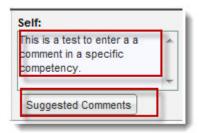
4. The form displays what was written by the employee in shaded areas titled Self-Evaluation. The supervisor can add content in the boxes under the shaded areas.



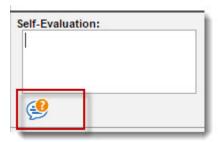
5. The score entered by the employee for each goal is also displayed in the Self-Evaluation shaded area. The supervisor must select the level of achievement using the Rating drop-down list of the Goal section.



6. The supervisor can enter comments for each key competency in the boxes located under the word Self:. If the employee has added a note in Area of focus on the Goal setting form, it will be displayed beside the word Self:.



7. The supervisor can get a list of suggested comments to insert in the key competencies section by clicking on Suggested Comments. The following steps explains how to get a list of suggested comments.



a. Select the category of comment that applies to the employee's position in relation to the compency.



b. Select the employee's gender.



c. Select the achieved level by the employee.



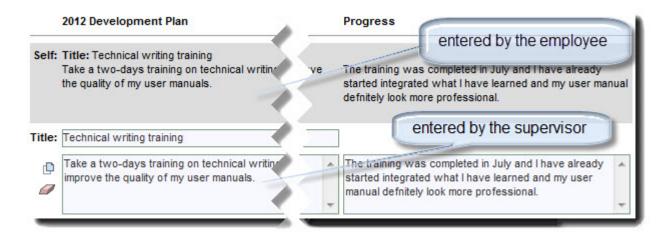
d. Ajust the nuance by sliding the scale bar in order to display the various comments that can be inserted. By sliding the scale bar to the right, you will notice that the suggested comment get more elaborate and more positive.



8. The system displays both the score given by the employee and by the supervisor.



9. The system displays the development plan entered by the employee in the Self: shaded area but the supervisor can add a plan and/or a comment in the appropriate boxes under the Self: section if the employee has not entered one.



Steps to review of the self-appraisal form by the supervisor

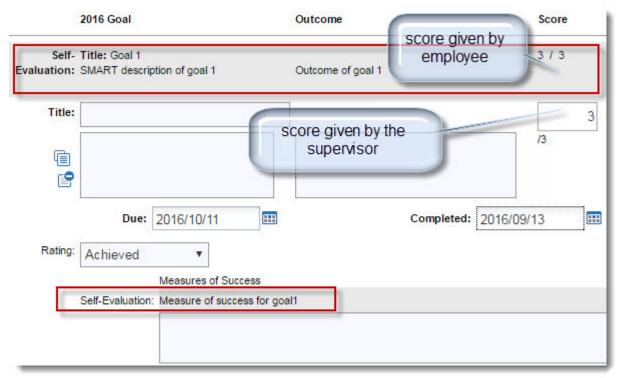
As a supervisor, you must review and finalize the self-appraisal that your subordinates have submitted.

1. Click on Write evaluations for my direct reports.



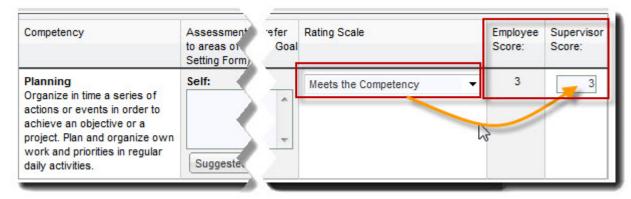
2. Click on Edit Form.





- 4. (Optional) Type or modify the goal description.
- 5. (Optional) Enter the goal Due date.
- 6. (Optional) Enter the goal achievement date in the Completed box.
- 7. Select the goal achievement level using the Rating drop-down list.
- 8. (Optional) Type or modify the Measures of success.
- 9. (Optional) Click on Add past goal if you need to add a goal that was not entered in the self-appraisal form filled by the employee.
- 10. (Optional) Type a comment related to the Planning competency.

11. Select the Planning competency level of achievement using the Ratings Scale drop-down list.



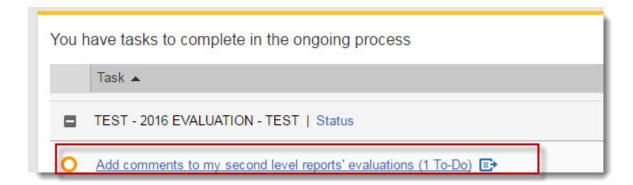
- 12. (Optional) Type a comment related to the Initiative competency.
- 13. Select the Initiative competency level of achievement using the Rating Scale drop-down list.
- 14. (Optional) Type a comment related to the Client service orientation competency.
- 15. Select the Client service orientation competency level of achievement using the Rating Scale drop-down list.
- 16. (Optional) Type a comment related to the Teamwork and cooperation competency.
- 17. Select the Teamwork and cooperation competency level of achievement using the Rating Scale drop-down list.
- 18. (Optional) Type or modify the Development Plan Title.
- 19. (Optional) Type or modify the Development Plan description.
- 20. (Optional) Type or modify a comment in the Progress box.
- 21. (Optional) Type a comment in the Supervisor's Comment box.
- 22. Click on Yes or No to indicate whether you have consulted the second level supervisor on this evaluation.
- 23. Type the Date of consultation if you have consulted the second level supervisor.
- 24. Click on Save Draft to save your form (especially if you need to modify it before sending the form back to your employee.
- 25. Click on Submit when you are ready to send the form to your employee for approval.

26. Click on OK to confirm that you do not need to modify the form.

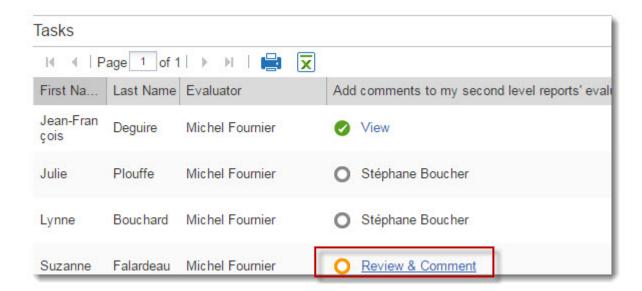
Second level supervisor's approval

The second level supervisor can add comments in the form. If the second level supervisor has forms to approve, they will appear on the Home Tab in the section You have tasks to complete in the ongoing process.

1. Click on Add comments to my second level reports evaluations.



Click Review and Comment.



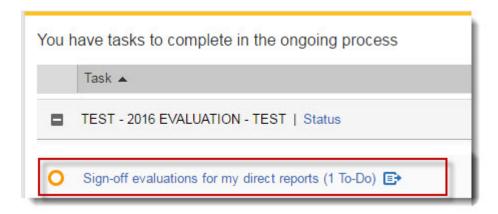
3. (Optionall) Enter a comment in the Second Level Supervisor box.



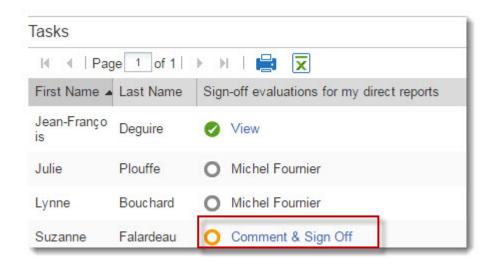
- 4. Click Save as Draft.
- 5. Click Submit.
- 6. Click OK.

Supervisor's sign off

1. Click Sign-off evaluations for my direct reports.



2. Click Comment and Sign Off.



3. (Optionall) Enter or modify the comment in the Immediate Supervisor's box.



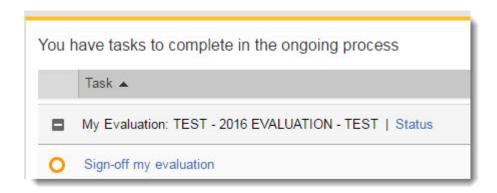
4. Click Save Draft.



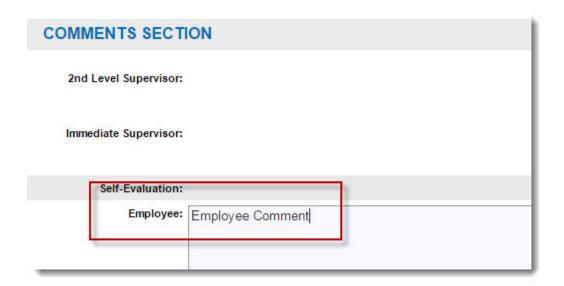
5. Click Sign Off.

Employee Evaluation Sign Off

1. Click Sign-Off my evaluation.



2. (Optional) Enter a comment in the Employee box.



3. Click Save Draft.

4. Click Sign Off.



5. Click OK.

Performance Improvement Plan (P.I.P.)

Performance Improvement Plan(P.I.P)

The performance improvement plan must be completed when the employee obtains Needs Improvement in at least one of the key competencies.

1. The process is not automatically assigned to each employee and supervisor, it is assigned upon request only when the need arises.

The supervisor must send an email to the address <u>performance@uottawa.ca</u> ⁵¹ requesting that the P.I.P. process be assigned to himself/herself and to the concerned employee.

2. The P.I.P. is a process containing three steps.

a performance vement plan for my direct... Employee signs-off

Sign-off PIP for direct reports

- 3. The three steps of the P.I.P. are:
 - a. The supervisor writes the P.I.P. and submits the form.
 - b. The employee signs off.
 - c. The supervisor signs off.

^{51.} mailto:performance@uottawa.ca

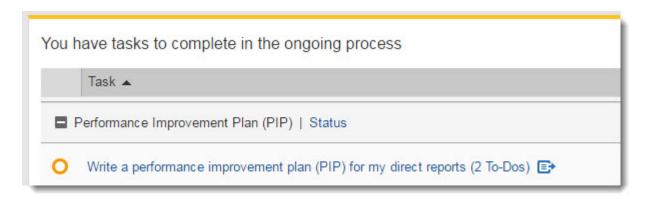
Steps of the P. I. P.

Some steps are completed by the supervisor, others are done by the employee and the process is completed when the form is signed electronically by the supervisor.

1. **Mote:**

The following steps are completed by the supervisor.

Click on Write a performance improvement plan (PIP) for my direct reports.



2. Note:

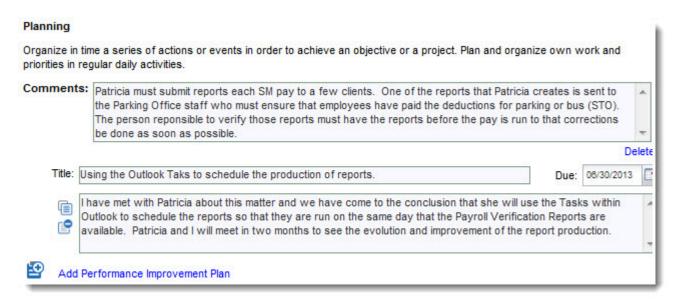
The system moves to the Task Status tab.

Click on Edit Form.

- 3. Click on the competency name that needs improvement using the Form Navigator.
 - Planning
 - Initiative
 - Client Service Orientation
 - Teamwork and Cooperation

The employee might have to improve more than one competency.

4. Click on Add Performance Improvement Plan.



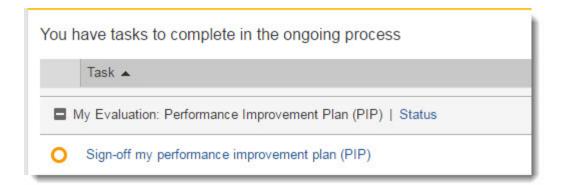
- 5. Describe the situation demonstrating that the employee must improve the competency in the Comments box.
- 6. Type a brief description of the performance improvement plan in the box Title.
- 7. Type a detailed description of the improvement plan in the box under the Title.
- 8. Enter the Performance Improvement Plan due date in the Due field.
- 9. (Optional) Click on Add Performance Improvement Plan to add another plan, for example, you might suggest that the employee registers for a specific workshop on time management.
- 10. (Optional) Click on the competency that needs to be improved using the Form Navigator.
 - Planning
 - Initiative
 - Client Service Orientation
 - Teamwork and Cooperation
- 11. Click on Save Draft.

- 12. Click on Submit when the form is complete and ready to be sent to the concerned employee.
- 13. Close the form by clicking on the red **X** situated on the right side of the form's heading.

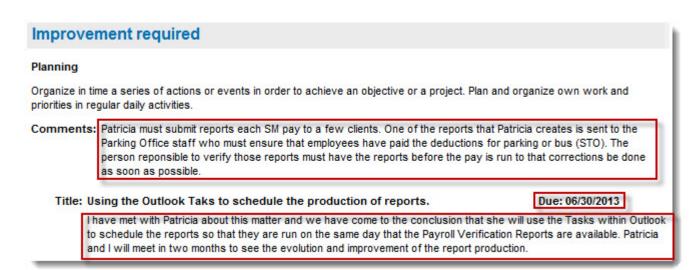
14. **Note:**

The next steps are completed by the employee who needs to sign off his/her P.I.P.

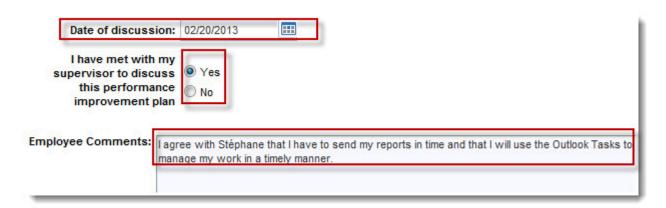
Click on Sign-off my performance improvement plan (PIP).



15. Read the comments added by the supervisor in each competency that need to be improved.



16. Enter the date when you have met with your supervisor to discuss the P.I.P. in the field Date of discussion



.

- 17. Click sur Yes or No of the option I have met with my supervisor to discuss this performance improvement plan.
- 18. (Optional) Type a comment in the Employee Comments box.
- 19. Click on Save Draft.
- 20. Clic, k on Sign Off.

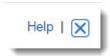


21. Click on OK.



The system will display the task as a completed status.

22. Click on the X to close the form.



Probation

Beginning of Probation Period

The probation process is started by writing the probationary goals. The supervisor must meet his employee to discuss the goals that need to be achieved by the end of the probation, the job requirements and key competencies.

The probation process contains two steps.

- The supervisor meets the employee to establish the goals during the probation period and to discuss the job requirements and the key competencies on which the employee will be evaluated.
- 2. The employee signs the goals for the probationary period.



Goal Setting Form

The probation goal setting form is used to establish the goals on which the employee will be evaluated at the end of the probationary period.

The form is divided in many sections.

- Employee Identification
 - If the information displayed in this section contains errors, they must be reported by email at the address <u>performance@uottawa.ca</u> 52
- 2. Training Sessions Required by Law

All employees working at the University of Ottawa are required to follow specific trainings that are considered mandatory by many levels of the Government.

^{52.} performance@uottawa.ca

3. Mandatory Training Sessions According to the University.

Some training sessions are considered mandatory by the University. Some training sessions are specifically mandatory for new employees working at the University whereas, others are specifically mandatory to all employees.

4. Mandatory Training Sessions Based on the Position Type.

Some training sessions are mandatory and they based on the type of position held by the employee. The supervisor must establish the training sessions that the employee will need to take.

5. Probationary goals

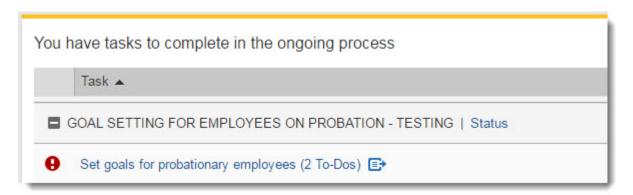
The supervisor must establish the SMART goals that the employee will need to have achieved by the end of the probationary period. He/she can enter up to five goals.

6. Job Requirements and Key Competencies

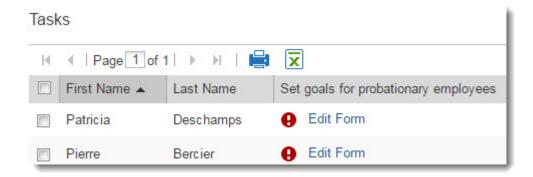
The supervisor has the responsibility to discuss the job requirements during the probationary period and the key competencies on which the employee will be evaluated at the end of the probation period.

Goal Setting

1. Click on Set Goals for probationary employees.



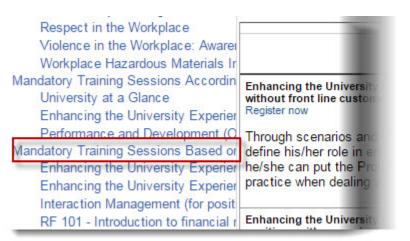
2. Click on Edit Form.

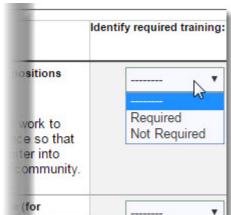


The form is displayed. The supervisor cannot register an employee to a training session, he/she will be able to register when he/she approves his/her probationary goal form.

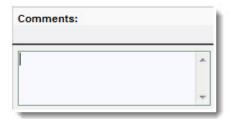
3. Click on Mandatory Training Sessions Based on the Position Type from the Form Navigator.

4. Click on the option that idendifies whether the training session is mandatory (R) or not required (NR) from the column titled Identify required training.



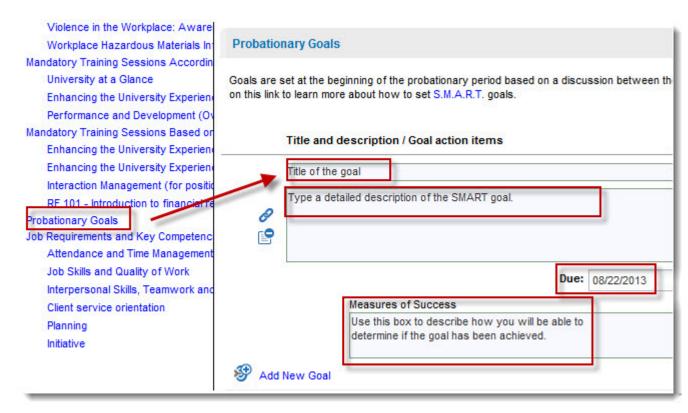


a. (Optional) Add a Comment.



- 5. Repeat the preceding steps for each training session displayed in the section Mandatory Training Sessions Based on the Position Type.
- 6. Click on Probationary Goals from the Form Navigator.

7. Type the Title of the Goal in the top box.

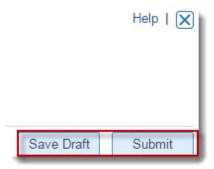


- 8. Type a detailed Description of the goal and a measure to achieve it, in the second box.
- 9. Click on the calendar icon of the Due field and select the probation end date.
- 10. Type a measure of success. The measure of success helps the supervisor and the employee determine if a goal has been achieved or not.
- 11. (Optional) Click on Add New Goal and repeat the preceding steps. You can add up to five goals.

12. Click on the Calendar icon of the Date of discussion field and select the date when you have met with your employee to discuss the trainings to take, the goals, job requirements and key competencies.



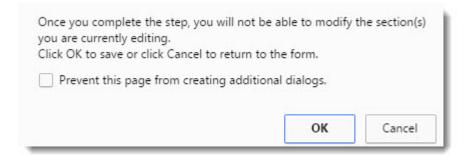
- 13. Click on the I have discussed these goals and the requirements with the employee option.
- 14. (Optional) Type a comment in the Supervisor's comments box.
- 15. Click on Save Draft.



- 16. Click on OK.
- 17. Click on Submit.

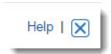
If you click on Submit, the form is saved and forwarded to the employee for his electronic signature. The form can no longer be modified once it has been submitted.

18. Click on OK.



You will not be able to modify the form once it has been submitted. The system will indicate that the step has a status of completed.

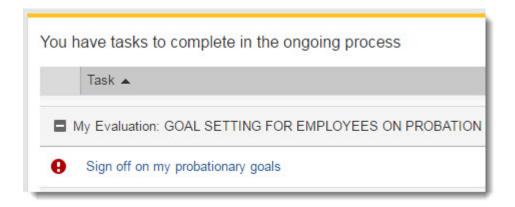
19. Click on the X to close the form.



Approval of probation goals

The supervisor has filled the form to establish the probationary goals, he/she submits the form to his employee in order for him/her to electronically sign it.

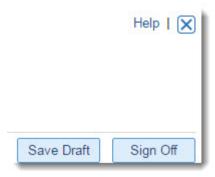
1. Click on Sign off on my probationary goals.



2. (Optional) Type a comment in the Employee's Comments box.

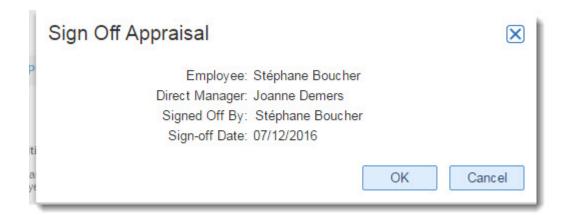


3. Click on Save Draft.



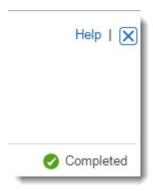
- 4. Click on OK.
- Click on Sign Off.
 If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.
- 6. Click on OK.

7. Click on Ok.



You cannot modify the form after you click on OK. The system will display the completed status.

8. Click on the red X to close the form.



End of probation period

The performance evaluation for employees on probation process completes the probation process.

The performance evaluation for probation has three steps.

End of probation Write evaluation(s) for
my direct rep...

End of probation Employee sign-off
Sign-off appraisals for second level ...

- 1. The supervisor writes the end of probation evaluation form.
- 2. The employee signs off the evaluation form.
- 3. The second-level supervisor signs off the form.

End of probation form

The probationary goals are inserted automatically into the End of Probation Evaluation Form. The supervisor begins the process.

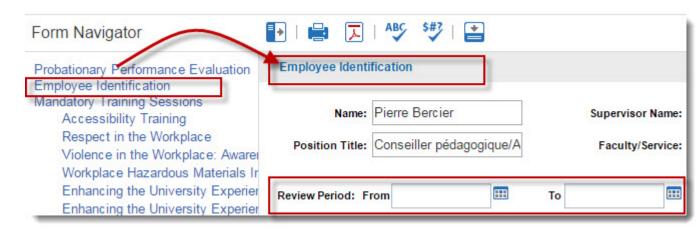
1. Click on End of probation - Write evaluation (s) for my direct reports.



2. Click on Edit Form.

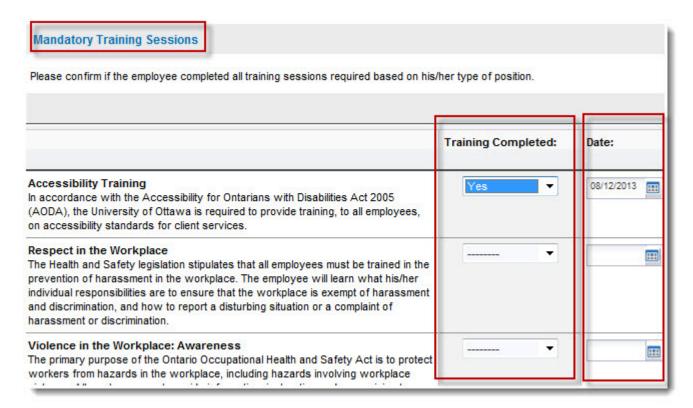


3. Click on Employee Identification from the Form Navigator.



- 4. Click on the calendar icon of the Review Period From and select the probation period begin date.
- 5. Click on the calendar of the To field and select the probation period end date.

6. Click on the Mandatory Training Sessions from the Form Navigator.

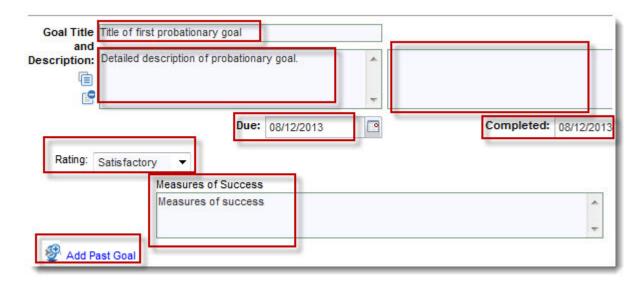


- 7. Using the arrow from the column labeled Training Completed, select the option that indicates whether the employee has taken the training or not.

 You must do this for every training sessions displayed on the form.
- 8. Click on the calendar icon of the Date field and select the date when the training was taken.

You must do this for every training sessions displayed on the form.

9. Click on Evaluation of Goals from the Form Navigator.



10. **Note:**

The goals that were set using the Probation Goal Setting form were copied into the Evaluation of Goals section but you can still modify their content.

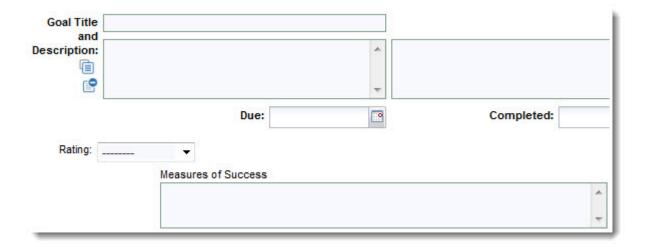
All the fields under the section Evaluation of Goals can be modified.

(Optional) Type a comment to demonstrate that the Goal has been achieved in the Outcome box.

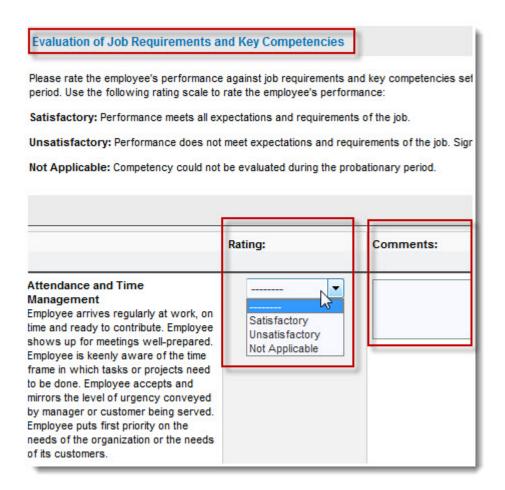
- 11. Click on the calendar icon of the Completed field and select the date when the goal was achieved.
- 12. Chose one of three possible Rating: Safisfactory, Unsatisfactory and Not Applicable
- 13. Repeat the last three steps for the next goals.

14. Click on Add Past Goal if you have omitted one or more goals when setting the goals.

The fields Goal Title and Description, Outcome, Due, Completed, Rating and Measure of success are displayed for you to fill.



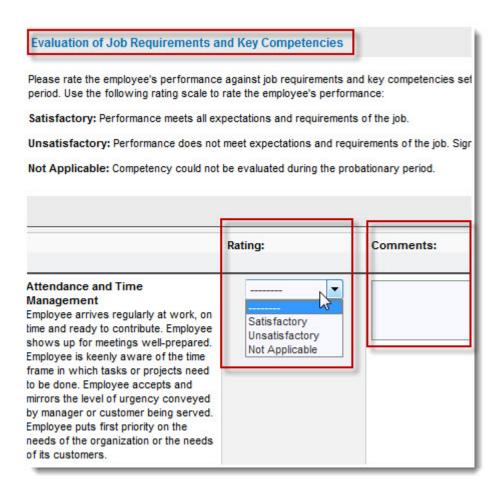
15. Click on the Evaluation of Job Requirements and Key Competencies from the Form Navigator.



The system displays the job requirements and key competencies on which the employee must be evaluated at the end of the probationary period.

- 16. Bring the cursor on the first job requirement / competency that is displayed on the form.
- 17. Select the level using the Rating drop-down list for the job requirement or competency.

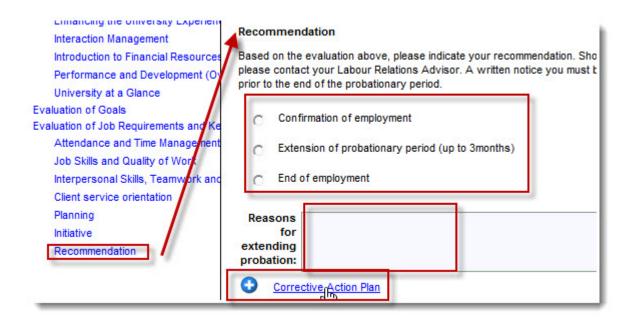
18. (Optional) Type a comment in the Comments box to justify the selected level.



- 19. Repeat the last two steps for each of the job requirements and competencies displayed on the form.
- 20. Click on Recommendation from the Form Navigator.

21. Select one of the three options to indicate the result of the probationary period.

- · Confirmation of employment
- Extension of probationary period (upto 3 months)
- End of employment



22. (Optional) Type a comment in the box Reason for extending the probation if you have selected to extend the probation at the previous step.

- 23. (Optional) Click on the Corrective Action Plan if you have decided to extend the probationary period.
 - a. Type the Title of the measure to adopt to correct the problem.
 - b. Click on the calendar icon of the Due date and select the date when the corrective measure must have begun.
 - c. Type a detailed description of the corrective measure to adopt to correct the problem in the box under the title.

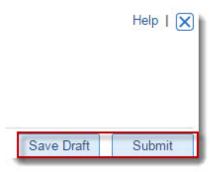


- 24. (Optionall) Click on Corrective Action Plan if you need to add more than one.
- 25. (Optional) Click on Delete to remove a corrective action plan.
- 26. (Optional) Click on the calendar icon Review again on and select the date if you have decided to extend de probationary period.



27. (Optional) Type a comment in the Supervisor's Comments.

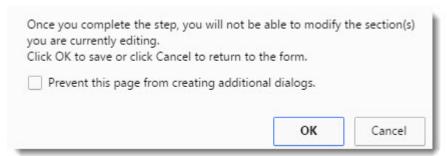
28. Click on Save Draft.



- 29. Click on OK.
- 30. Click on Submit.

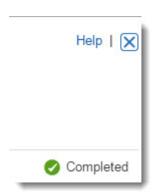
If you click on Submit the form is saved and the process is completed. The form cannot be modified once it has been submitted.

- 31. Click on OK.
- 32. Click on Ok.



You cannot modify the form after you click on OK. The system will display the completed status.

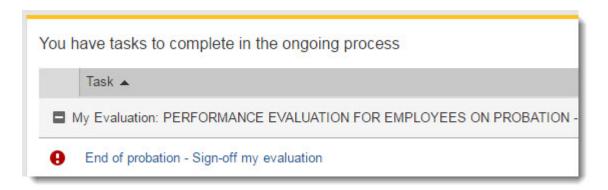
33. Click on the X to close the form.



Signature of the End of Probation Evaluation Form

The second step of the end of probation process must be completed by the employee. This step is necessary because it enables the employee to electronically sign the end of probation form and to add a comment.

1. Click on End of probation - Sign-off my evaluation.



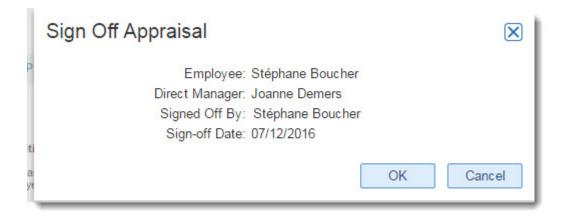
2. (Optional) Type a comment in Employee's Comments.



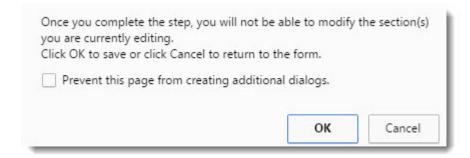
3. Click on Save Draft.



- 4. Click on OK.
- Click on Sign Off.
 If you click on Sign Off the form is saved and the process is completed. You cannot modify the form once it has been signed off.
- 6. Click on OK.

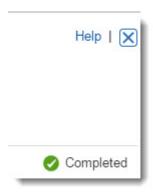


7. Click on OK.



The system will the task with a completed status.

8. Click on the X to close the form.



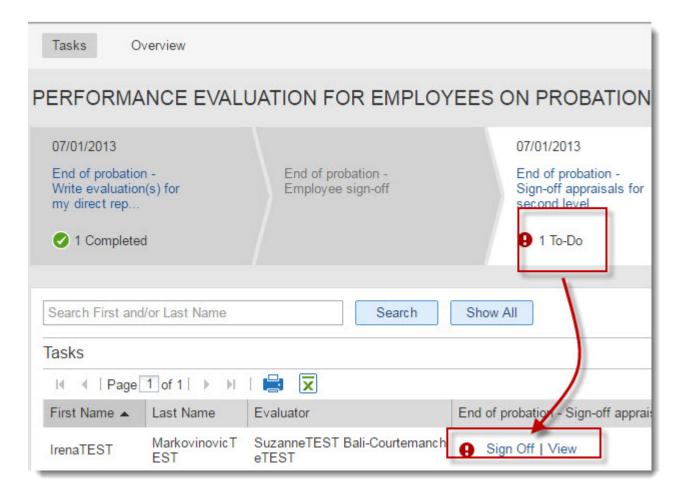
Second Level Supervisor Approval

The second level supervisor must sign off the form to complete the end of probation process. At this point, no modifications can be made to the form. The second level supervisor can only review the content and sign off.

1. Click on End of probation - Sign-off appraisals for second level reports.



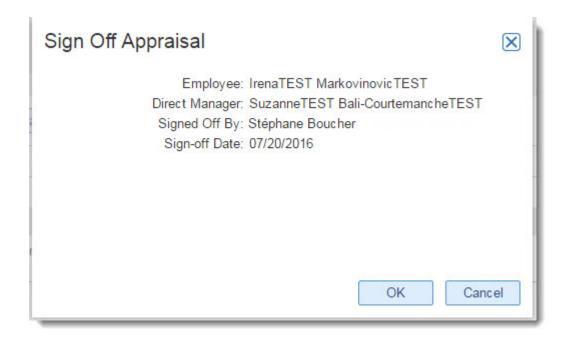
2. Click on View.



If you click on Sign Off, the system will ask you to sign off without reviewing the content of the form.

3. Click on Sign Off.

4. Click on OK.

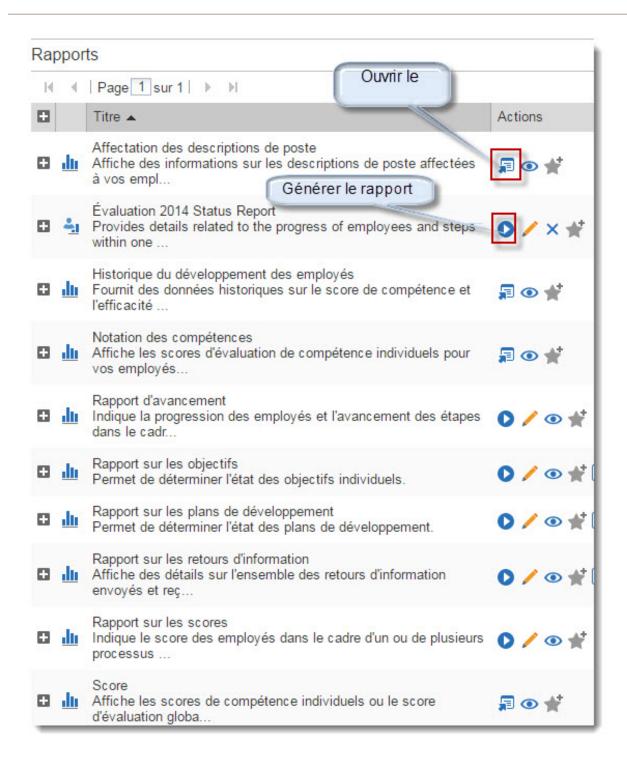


The system will display the task as a completed status.

Halogen Reports

About reports

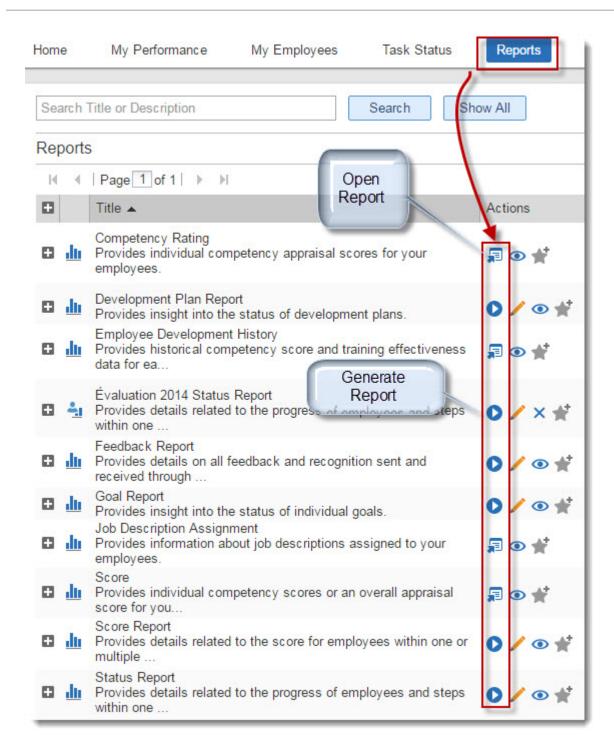
Halogen can generate a variety of reports. The employee's user type determines which reports they can generate.



The Job Description Assignment report is not usable at the moment.

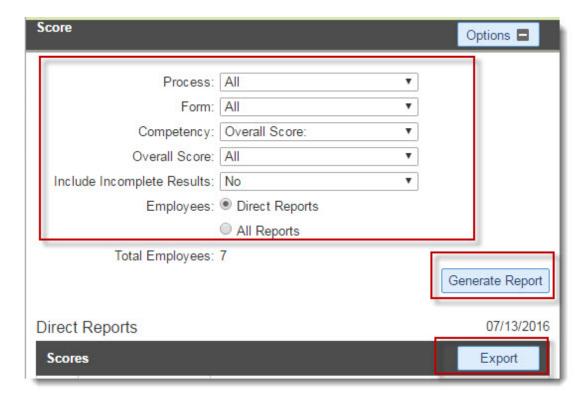
Score

Provides details related to the score for employees within one or multiple Performance processes.



- 1. Click on Reports.
- 2. Click on Open Report icon of the Score report.

3. Results can be filtered to meet reporting needs.



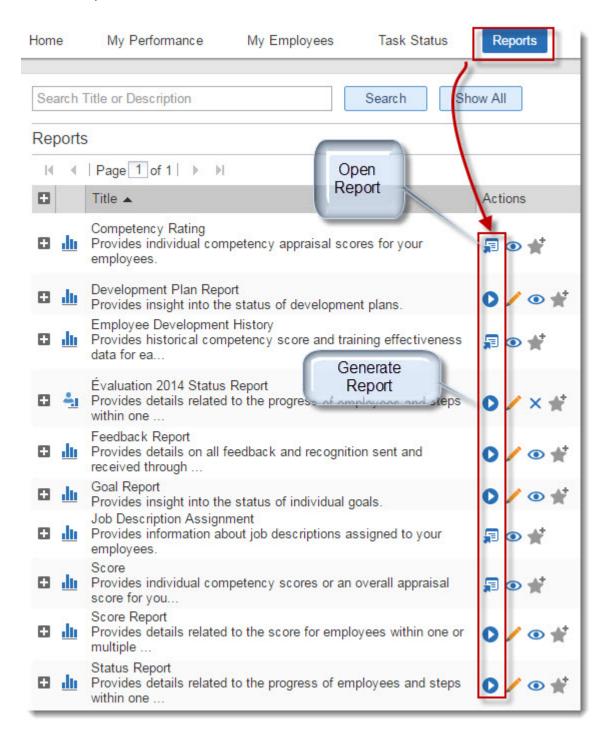
- Process: select the specific process from the drop-down list to view the corresponding scores.
- Form: select the form from the drop-down list to view the corresponding scores.
- Competency: select the specific competency from the drop-down list to view the corresponding score.
- Overall Score: select one of the operators from the drop-down list (greater than, less than, etc.) and then choose a value that appears in the field on the right.
 This will filter results to include those that meet the overall score parameters you entered.
- Include Incomplete Results: select «1»Yes«2» or «1»No«2» to include or exclude incomplete results.
- Employees: to view results for only those employees who report directly to you, select Direct Reports.
- 4. Click on Generate Report.

- 5. Click on Export to export in Excel.
- 6. The report opens in Excel.

Direct Reports	Employee	Supervisor	Overall Score:	Action
_	Boileau Micheline	Pagé, Daniel	3.0	View Appraisal
	Laframboise, Marc	Pagé, Daniel	4.0	View Appraisal
				View Appraisal
	Rinfret, Martin	Pagé, Daniel	3.0	View Appraisal
	Sauriol, Lucienne	Pagé, Daniel	3.0	View Appraisal
	Average		3.4	

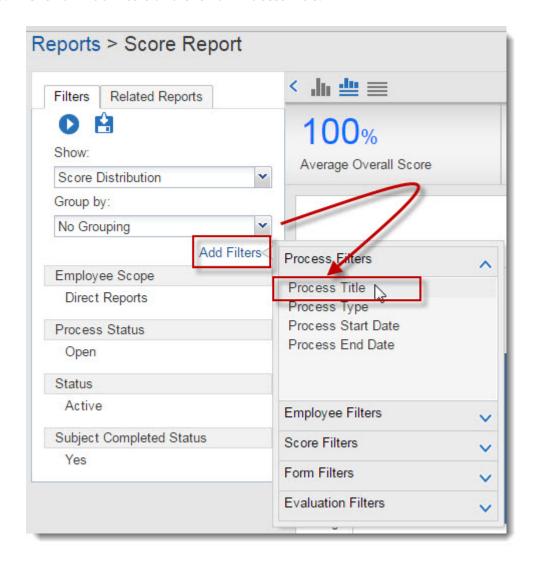
Score Report

Provides details related to the score for employees within one or multiple Performance processes.

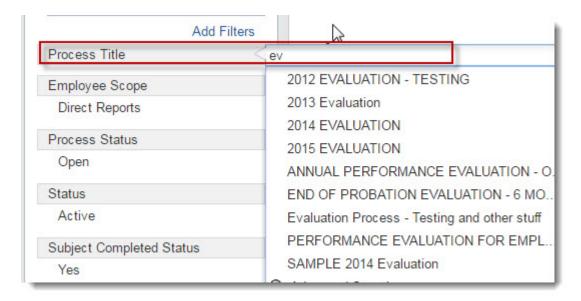


- 2. Click on the Generate report in the Actions column of the Score Report.

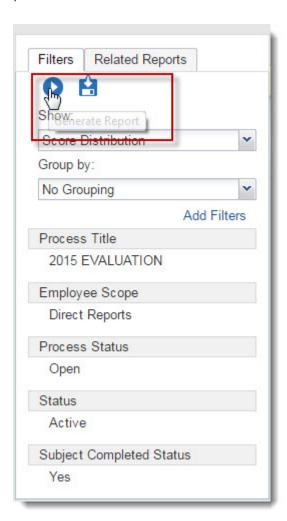
 The report is displayed in a new window.
- 3. Click on Add filters and click on Process Title.



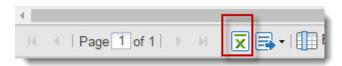
4. Type the first few letters of the process and click on the process name in the drop-down list.



5. Click on the Generate Report icon (the report will be run using the selected processes).



6. Click on the Export to Microsoft Excel icon.

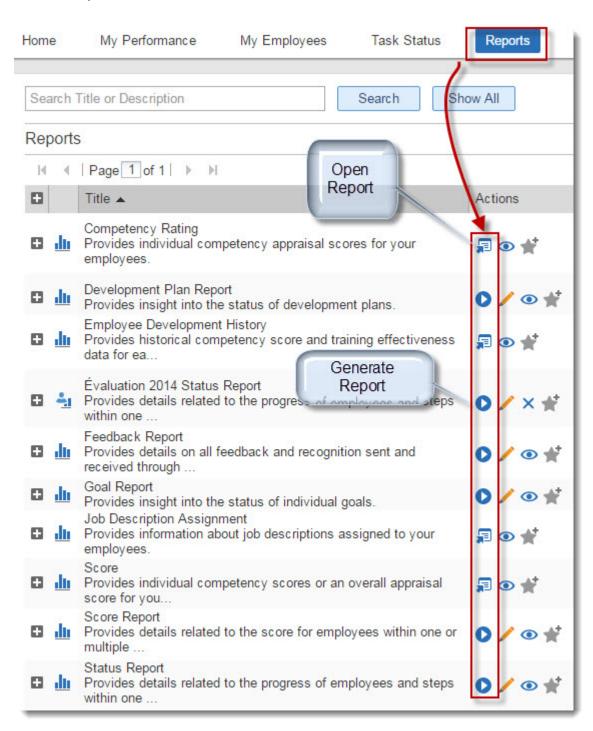


7. Le report opens in Excel.

Overall Score	Subject Name	Evaluator Name	Process Title
4.000	Boileau Micheline	Pagé, Daniel	2014 Evaluation
4.000	Laframboise, Marc	Pagé, Daniel	2014 Evaluation
3.000	Dufresne, Denise	Pagé, Daniel	2014 Evaluation
3.000	Rinfret, Martin	Pagé, Daniel	2014 Evaluation
3.000	Sauriol, Lucienne	Pagé, Daniel	2014 Evaluation

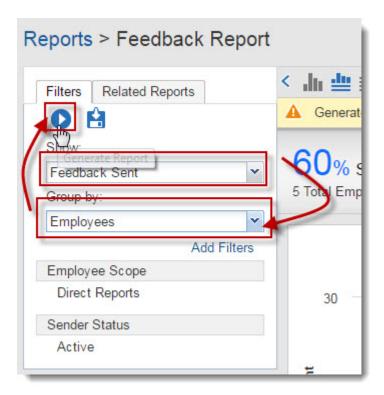
Feedback Report

This report provides details on all feedback and recognition sent and received through the year.



2. Click on the Generate report in the Actions column of the Feedback Report. The report is displayed in a new window.

3. Select Feeback Sent.



- 4. Select Employees.
- 5. Click on Generate Report.
- 6. Click sur the Export to Excel icon.

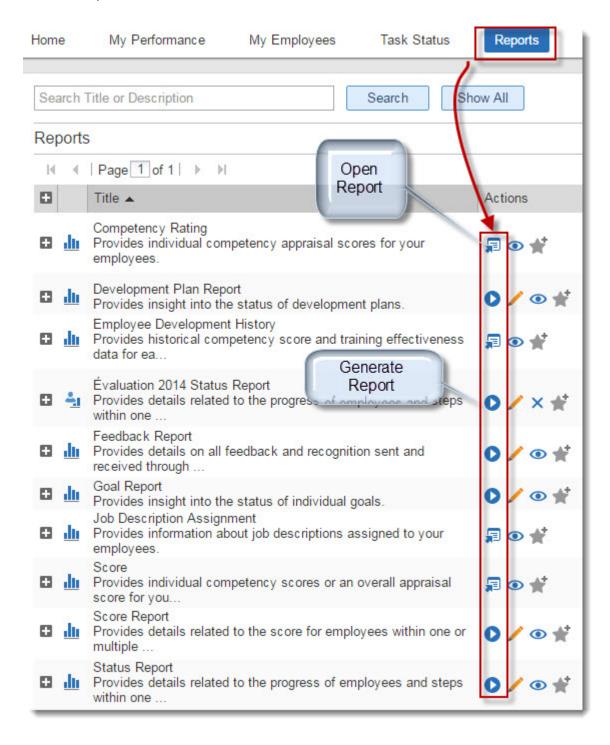


7. The report opens in Excel.

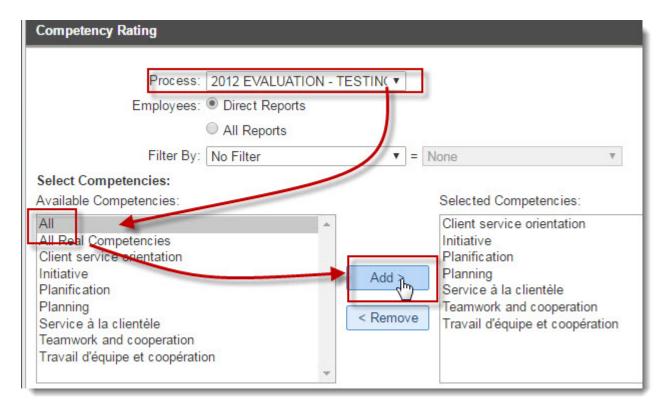
Feedback Type	Sender Name	Recipient Name	Feedback Title	Feedback Description	Feedback Sent /Received Date
Manager Note	Courtemanche, Chantal	St-François, Diane	Journal Note		03/19/2012
Journal Note	Bercier, Pierre	Bercier, Pierre	Courriel du professeur M. Quelquechose	Copier Ibouchar@uottaw a.ca	03/09/2015
Journal Note	Bercier, Pierre	Bercier, Pierre	Courriel envoyé	contenu du courriel icilbouchar@uott awa.ca	03/09/2015
Journal Note	Bercier, Pierre	Bercier, Pierre	Nice email from Mr Something	copy and paste the email here	12/01/2015
Journal	Deschamps,	Deschamps,	k,nlkjkjg		02/05/2013
Journal	Deschamps,	Deschamps,	un titre significatif	^09uipiok	02/26/2013

Generating a competency rating report

Provides individual competency appraisal scores for your employees.



- Click on the Open Report icon of the Competency Rating report.
 The Competency Rating report is displayed in a new window.
- 3. Results can be filtered to meet reporting needs.

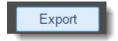


- Employees: to view direct results for only those employees who report directly to you, select Direct Reports: to view results for all employees you are responsible for, select TAII Reports.
- Filter by: select the desired parameters (Position Title, Position Number, Faculty or Service, etc.). Click Select to choose a value for the filter from the list, then clickOK.
- Select Competencies: click from the available competencies or click All then click Add.

4. Click Generate Report.



5. Click on Export.

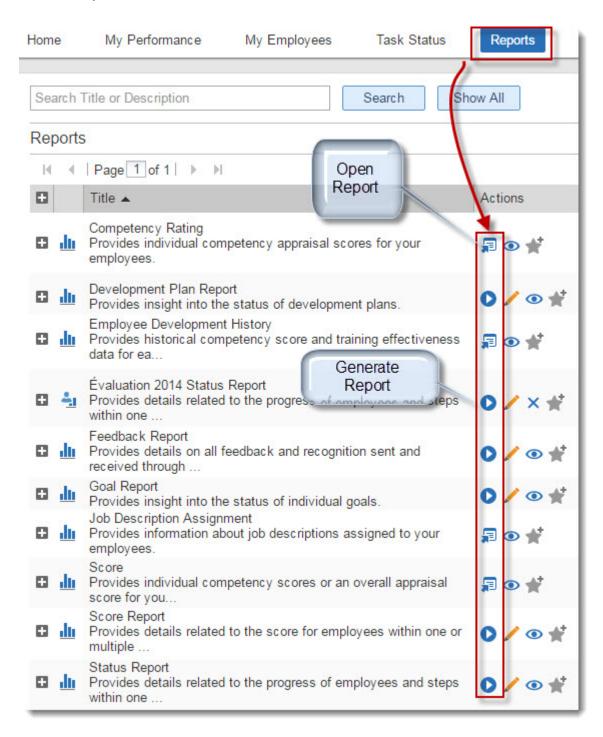


- 6. Click OK.
- 7. The report opens in Excel.

Competency	No of Responses	On Time	Lowest	-	-	Highest	N/A
Employee Count	1	100.0%	-	-) <u>=</u>	124	_
Client service orientation	1	100.0%	_	_	100.0%	120	90
Initiative	1	100.0%		-	-	100.0%	4 312 Tab
Planning	1	100.0%	-	-	100.0%		307.0
Teamwork and cooperation	1	100.0%	-	-	-	100.0%	-

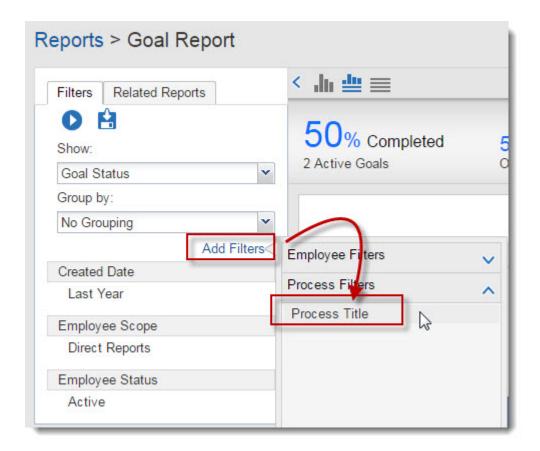
Generating a goals report

Provides insight into the status of individual goals.

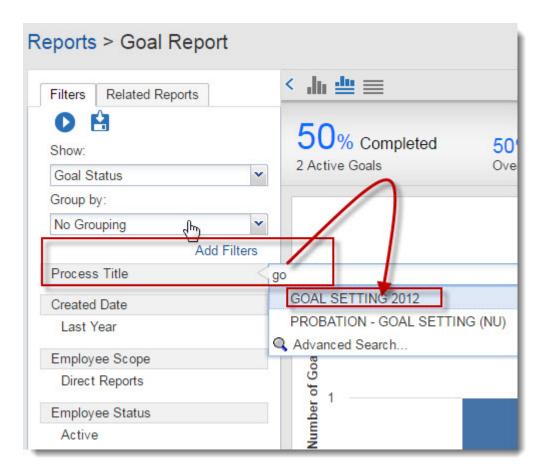


Click on Generate Report of the Goals report.
 The Goals report is displayed in a new window.

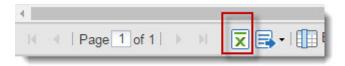
3. Click on Add filters and click on Process Title.



4. Type the first few letters of the process and click on the process name in the drop-down list.



5. Click on the Export to Excel icon.



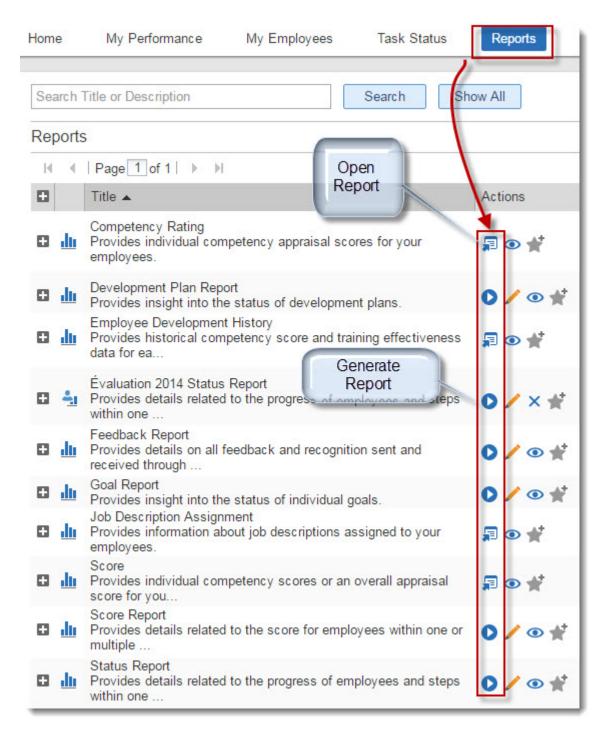
6. Click Open.

7. The report will be produced as an Excel document.

Goal Status	Employee Name	Goal Title	Due Date	Completed Date	Progress Flag
Completed	Bercier, Pierre	New goal in dec 2015		12/18/2015	On Track
In Progress	Deschamps, Patricia	nouveau titre pour obj 2015	12/18/2015		On Track
In Progress	Deschamps, Patricia	nouveau titre pour obj 2015	12/18/2015		On

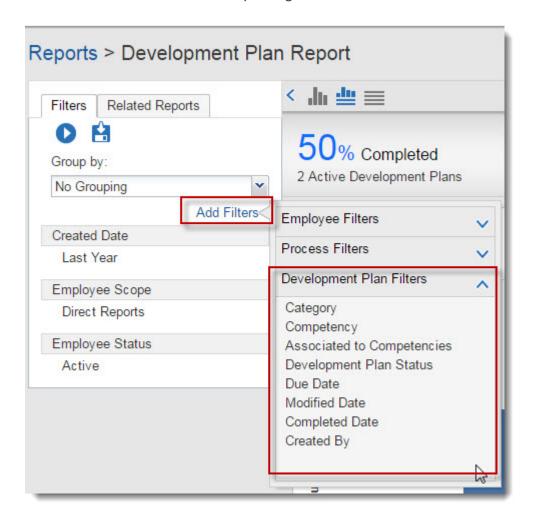
Generating a development plan report

A development plan report shows a list of development plans for the supervisor's employees. The report shows the different elements of the plan (title, category, status, etc.).



Click on Development Plan.
 The development plan report is displayed in a new window.

3. Results can be filtered to meet reporting needs.



- Process: select the specific process from the drop-down list to view the development plan
- Status: select a status from the drop-down list.
- Related Competency: select a competency.
- Category: select a category from the drop-down list.
- Employees: to view results for only those employees who report directly to you, select Direct Reports; to view results for all employees you are responsible for, select All Reports.

4. Click on the Export to Excel icon.

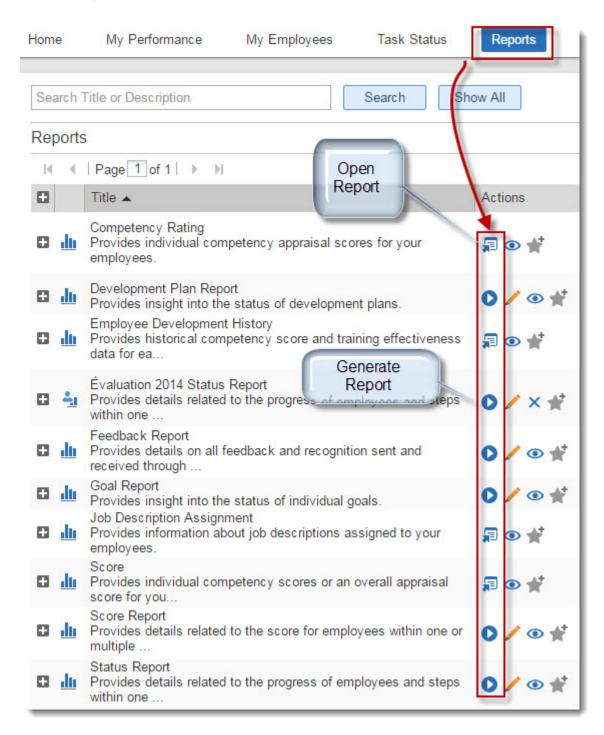


- 5. Click Open.
- 6. The report will be produced as an Excel document.

Status	Employee Name	Title	Competency Title	Due Date	Completed Date
Completed	Bercier, Pierre	new dev plan 2015	Planning		12/04/2015
Not Started	Ely, Peter	ajou plan de dev	Planification		

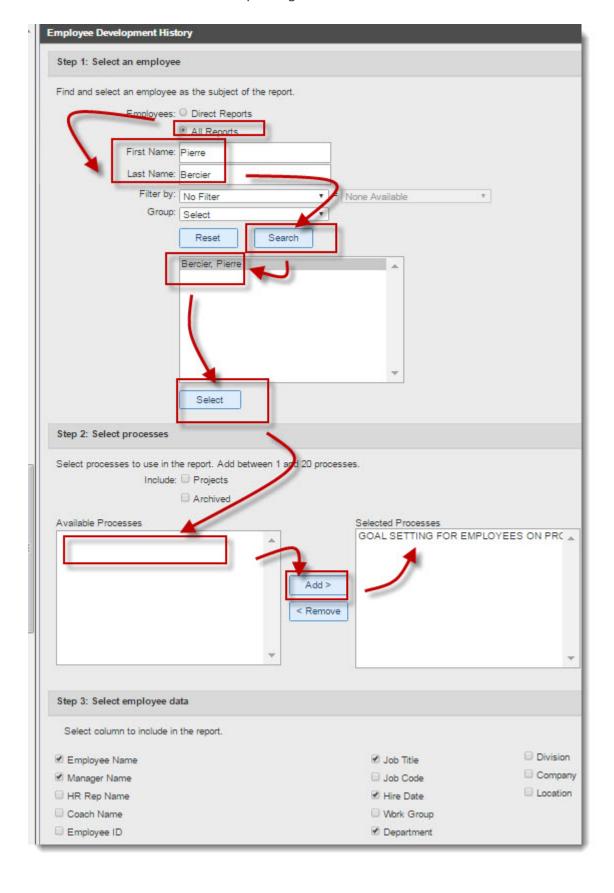
Generating an employee development history report

This report shows employees competency scores over time. If a learning activity or any professional development is associated with a competency, the supervisor can use the report to assess the effectiveness of the activity.



Click on Employee Development History report.
 The Employee Development History report is displayed in a new window.

3. Results can be filtered to meet reporting needs:

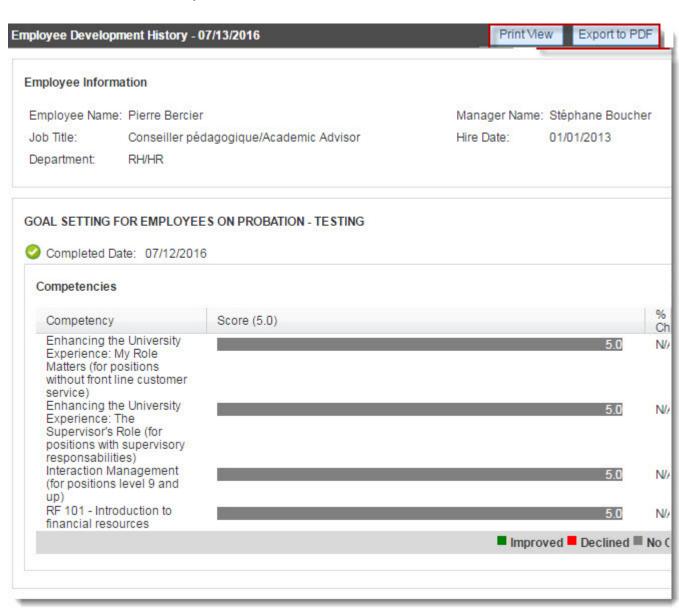


• Enter the employee's first and last names where indicated.

4. Click Generate Report.

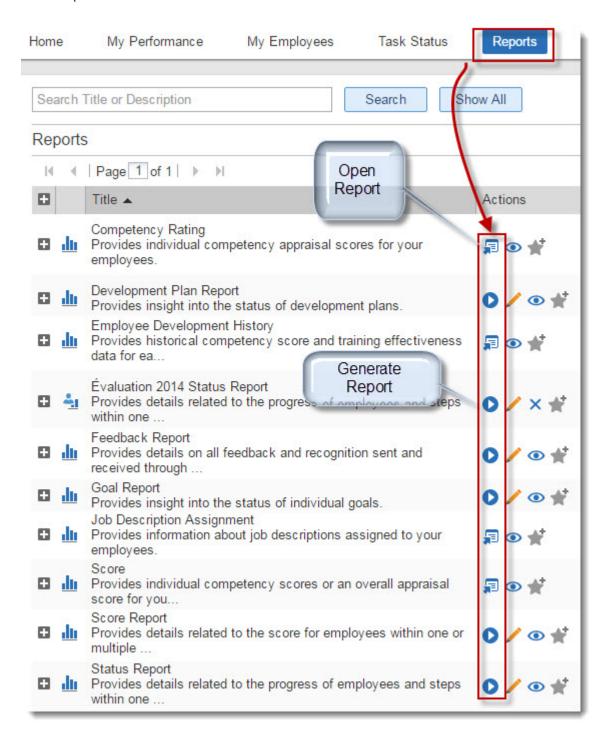
Generate Report

5. Click the Print Preview or Export to PDF.

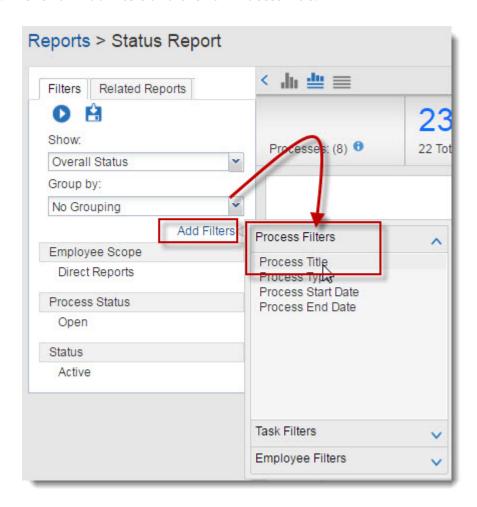


Generating the Status Report

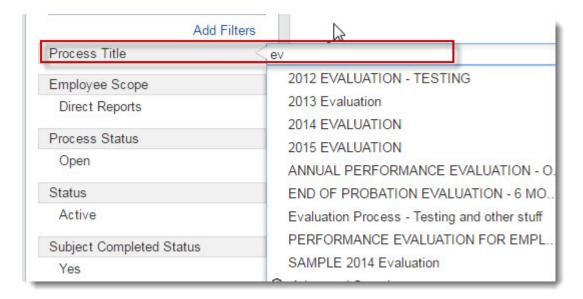
This report provides details related to the progress of employees and steps within one process.



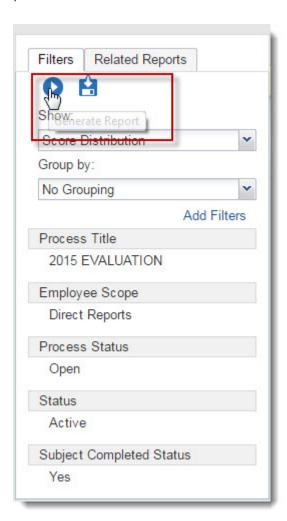
- 2. Click on the Generate report in the Actions column of the Status Report. The report is displayed in a new window.
- 3. Click on Add filters and click on Process Title.



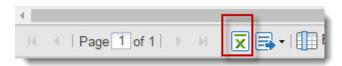
4. Type the first few letters of the process and click on the process name in the drop-down list.



5. Click on the Generate Report icon (the report will be run using the selected processes).



6. Click on the Export to Microsoft Excel icon.



7. Click on Open.

Do you want to open or save Score_Report_export.xls (5.50 KB) from tms.na1.hgncloud.com?

Open

8. Le report opens in Excel.

Overall Score	Subject Name	Evaluator Name	Process Title
4.000	Boileau Micheline	Pagé, Daniel	2014 Evaluation
4.000	Laframboise, Marc	Pagé, Daniel	2014 Evaluation
3.000	Dufresne, Denise	Pagé, Daniel	2014 Evaluation
3.000	Rinfret, Martin	Pagé, Daniel	2014 Evaluation
3.000	Sauriol, Lucienne	Pagé, Daniel	2014 Evaluation