

Performance Excellence Program (PEP) Manual and Halogen User Guide

Annual Performance Evaluations

for employees in the
Management Compensation Plan (MCP)* &
Health Administrative Compensation Plan (HACP)

*Excludes employees in the City Attorney's Office, City Council, and City Auditor's Office

Table of Contents

Introduction	3
HOW TO USE THIS MANUAL	4
Halogen Performance Software	5
Performance Management Program Overview	6
The Competency-Based Program	6
Core Competencies (For all MCP/HACP employees)	6
Leadership & Safety Competencies	7
Probationary Employees	8
The Performance Excellence Program	9
PART 1: Review of Competencies/Setting Optional Expectations	9
Part 1: Review of Competencies / Setting Optional Expectations in Halogen	10
Optional Expectations Box	14
Important Icons & Buttons	15
PERFORMING	17
Providing Comments and Feedback in Halogen:	17
Feedback Types: What does each mean?	19
Goals & Expectations	23
PART 2: Evaluating Competencies	25
PART 2: Evaluating Competencies in Halogen	28
Form Views for Part 2: Evaluating Competencies	38
Evaluation Form: Manager View	38
Evaluation Form: Second-level Manager and Appointing Authority View	39
Evaluation Form: Employee View	40
Employee Records Button	41
Appraisals Button	42
Important Icons & Buttons	43
Evaluating Competencies: Scores & Ratings	46
Core Competencies and Leadership & Safety Competencies Score & Rating	46
Overall Section Scores & Performance Rating	47
Using the Halogen Software	48
Task Section	48
Goal Section	52
Share Section	55
Shortcuts Section	57
Main Menu Options	62
Notifications	64
Terms & Definitions	65

Introduction

Performance Management is a not a punitive process. Instead, it is the process of managers and employees working together to set and achieve expectations that support and help accomplish the mission and vision of the City of Columbus.

The Performance Excellence Program (PEP) is the annual evaluation process that establishes core and leadership competencies for employees as part of the overall goal of making Columbus...

“America’s Opportunity City”

PEP Program Mission

To promote results and behaviors that ensure the success of every employee and to uphold the City of Columbus Performance Management Philosophy:

“Every City of Columbus employee is entitled to an effective, efficient, and timely evaluation of their performance.”

Program Values

- Customer Focus
- Accountability for Results
- Continuous Improvement
- Operational Efficiencies
- Diversity and Inclusion

Program Objectives

- 1) Produce a collaborative and supportive performance environment where managers and employees work together to establish, achieve, and accurately evaluate competencies and expectations.
- 2) Provide tools to encourage communication between managers and employees to ensure a clear understanding of the link between their contributions and:
 - Strategic Goals - Citywide goals which contribute to making Columbus America’s Opportunity City, and
 - Program Goals – Department, division, or section goals which contribute to and support strategic goals.
- 3) Develop and reward behaviors and results as a vehicle to achieve a high-performing government.
- 4) Create accurate and reliable employee performance data and maintain a continuous performance history.

Who is Covered by the Performance Excellence Program?

All employees under the Mayor whose terms and conditions of employment are governed by the Management Compensation Plan (MCP) or the Columbus Health Department’s Health Administrative Compensation Plan (HACP) and are covered by the Performance Excellence Program with the following exceptions:

Exceptions:

- Seasonal Employees
- Employees assigned to MCP/HACP whose classifications would otherwise be in a bargaining unit working less than 20 hours per week
- Temporary Employees (480 hours)
- MCP employees in the City Attorney’s Office, City Council, and City Auditor’s Office

HOW TO USE THIS MANUAL



Halogen information is located below each step for both of the PEP processes.

To learn more about each of the PEP processes, each process is explained individually, followed by the accompanying Halogen information.

While images of individual Halogen screens are shown for clarity, please understand that many screens will be left out for the purpose of space.

Helpful Hints:

- **Do not click the “Back” button on your browser (Internet Explorer, Chrome, Firefox, etc.) in Halogen.**
- **Do not add @columbus.gov after your username when logging into Halogen.**
- **Do wait 15 minutes to reset your password if locked out of Halogen.**
- **Do check the Tasks section, located at the top of your Halogen homepage, for tasks to complete.**

Halogen Performance Software

The Performance Excellence Program is no longer accomplished by using paper forms. PEP is begun, operated, and finalized all in a software program called Halogen.



Halogen is a web-based software platform which makes it much easier to track and manage performance.

Halogen software allows managers to collaborate with their employees on:

- 1) Reviewing Competencies
- 2) Managing Performance
- 3) Evaluating Performance

Some of the software's capabilities include:

- 1) Email Notifications & Reminders
- 2) Web-Based Platform
 - a. Can be accessed from any computer
 - b. Can be accessed from mobile devices
- 3) Accomplishment of expectations can be tracked throughout the year
- 4) Comments can be created and stored for the record throughout the year

Logging in to Halogen:

Login – Your City of Columbus computer user name (John A. Smith = jasmith)

Password – A password of your choice

Password Rules:

- Be at least 8 characters
- Include 1 or more letters (a-z, A-Z)
 - Letters must be mixed case
- Include 1 or more numbers (0-9)

Halogen Link: <https://global.hqncloud.com/cityofcolumbus/welcome.isp>

The Halogen link can also be found on the [City of Columbus Intranet Home Page](#) as well as department intranet home pages.

Entering new employees into Halogen:

When a new MCP/HACP employee is hired, or an employee is promoted into an MCP/HACP classification, it is the department's responsibility to notify the Human Resources Department by contacting either, Greg Beaverson at GJBeaverson@columbus.gov, or Dave Hamon at DNHamon@columbus.gov to enter the employee into the Halogen system. For the employee to be entered into Halogen, departments must provide:

- Employee's name and ID number
- Name of employee's direct supervisor
- Classification title & hire date
- Names of MCP/HACP direct reports (if applicable)

Once entered into the system, new MCP/HACP employees will receive an email notification from Halogen with directions for activating their Halogen account.

Updating information for current employees in Halogen:

When an MCP/HACP employee is assigned to a new manager, changes classifications, transfers to a different department, or leaves the employment of the City of Columbus, it is the department's responsibility to notify the Human Resources Department of such changes.

Performance Management Program Overview

The Competency-Based Program

In 2019, the Performance Excellence Program, which is administered in the Halogen software system, was redesigned from a goal-based program to a competency-based program in an effort to simplify the performance management process. The program is a 2-part collaborative process, consisting of:

Part 1: Review of Competencies (beginning of the year)

Do employees understand the competencies and expectations for the coming performance cycle?

Performing (throughout the year)

How do the manager and employee function together to communicate progress during the performance cycle?

Part 2: Evaluating Competencies (end of the year)

How does the employee's performance align with the competencies and expectations reviewed at the beginning of the performance cycle?

The competency-based program includes:

1. **Core Competencies** (applicable to all MCP/HACP employees)
 - **Optional Expectations:**
Managers have the option to set specific expectations related to the competencies, thus providing further guidance to the employee during the performance period. During the evaluation, managers may use the optional expectations to provide examples for how the employee did or did not fulfill the competencies. Employees are only evaluated on the Core Competencies.
2. **Leadership & Safety Competencies** (applicable to MCP/HACP employees with supervisory or program management responsibilities and/or safety responsibilities or job duties).

What is a Competency?

A competency is the combination of skills, knowledge and behavior that builds organizational and individual capability and effectiveness. Competencies are listed with accompanying performance descriptions. Managers determine the level of employee performance based on most, but not necessarily all of the performance characteristics. Competencies describe a *Successful* level of performance.

Core Competencies (For all MCP/HACP employees)

Employees will be evaluated on their overall job performance relative to the 5 established competencies listed below. The core competencies apply to *all* City of Columbus employees.

Customer Focus (Internal & External)

- Provides requested assistance and/or information in a prompt and courteous manner
- Performs with accuracy and thoroughness
- Anticipates customer needs and seeks ways to improve service delivery
- Recommends customer-focused processes or solutions with due consideration for resource constraints

Accountability For Results

- Assumes personal responsibility for actions
- Performs job duties in a manner consistent with time and quality standards
- Consistently balances quality of work with meeting deadlines
- Effectively manages multiple priorities and anticipates broad workflow needs, including problem resolution

Continuous Improvement

- Demonstrates willingness to do things differently for positive change

- Actively participates in training and other professional development activities or on-the-job opportunities to learn new ways of doing things
- Creates opportunities for process improvements and shares best practices
- Applies new and innovative ways of doing things to everyday work

Operational Efficiencies

- Identifies inefficiencies and recommends or contributes to plans for improvement
- Collaborates and builds internal and external partnerships for responsive, transparent, and effective governance
- Demonstrates awareness that public employees serve as stewards of public funds and resources
- Ensures resources are used in the most effective and prudent manner possible

Diversity and Inclusion

- Fosters a workplace culture of inclusion and unity
- Demonstrates an awareness of, and sensitivity to, the needs and concerns of all people
- Practices verbal and non-verbal communication skills
- Proactively seeks to understand and educate themselves about issues related to diversity and inclusion

Leadership & Safety Competencies

Employees who have supervisory responsibilities or program management responsibilities, and/or safety responsibilities or related duties, will also be evaluated on the leadership and/or safety competencies listed below.

Managing Performance

- Leads by example; demonstrates high ethical standards
- Regularly communicates tasks to be achieved to direct reports
- Provides regular, constructive feedback and coaching to direct reports based on performance
- Participates in the performance management process with every direct report, conducting required and appropriate sessions in a timely manner
- Uses recognition programs when appropriate
- Fosters a work environment characterized by mutual respect

Managing Resources

- Maintains appropriate budgetary and asset controls
- Initiates timely and effective corrective action when needed
- Makes effective use of available resources to accomplish goals and meet workload requirements
- Responds to needs for cost containment as required
- Plans and budgets resource requirements for future operational needs
- Uses minimal resources to produce maximum results

Culture of Occupational Safety

- Responds positively to safety-oriented feedback
- Follows all safety rules, proactively works to prevent accidents and complies with safety regulations
- Encourages the use of sound judgment regarding safety throughout the work environment

Important Dates for New MCP/HACP or Transferred Employees in the Halogen System

Under the old goal-based program, new MCP/HACP employees were placed into three probationary processes in the Halogen system to capture the new employee's contributions to the City of Columbus in the first year of employment.

Under the competency-based program, all MCP/HACP employees, regardless of hire date, are placed into Part 1: Review of Competencies Process. Employees will be placed in either the *current* year's Part 1 Process or the *coming* year's process, depending on their hire date:

Employees hired prior to October 1 will be placed into the Part 1: Review of Competencies Process for the **current** year and will receive an evaluation in December of that year.

- For example, an employee hired on June 30, 20xx will be placed into the Part 1: Review of Competencies Process for the 20xx (same year as year hired) performance management cycle. The employee will subsequently receive an evaluation that December, during the Part 2: Evaluating Competencies Process.

Employees hired after October 1 will be placed into the Part 1: Review of Competencies Process for the **coming** year.

- For example, an employee hired on October 5, 20xx will be placed into the Part 1: Review of Competencies Process for the 20xx (*coming year*) performance management cycle. The employee will receive their first evaluation then in December of 20xx.

The Performance Excellence Program

PART 1: Review of Competencies/Setting Optional Expectations

✓ *The manager should always meet with the employee at the beginning of the process.*

“The performance management process begins and ends with the manager.”

Also known as performance planning, a review of the competencies and the setting of practical expectations is the most important part of the performance evaluation process and functions to ensure employees are aware of the manager’s expectations for the coming year.

The Part 1: Review of Competencies/Setting Optional Expectations Process takes place at the beginning of the year and begins with the manager. The process consists of 2 steps, Manager reviews competencies and sets optional expectations and Employee confirms competencies and expectations. Each year the process will open on December 1 and must be completed by January 31. Once the process opens, managers will complete the first step by reviewing the Core Competencies with employees. If applicable, managers will also review the Leadership and Safety Competencies for those employees with supervisory or program management responsibilities and/or safety responsibilities or job duties. The manager may also set Optional Expectations related to the competencies if desired. Once finished, the employee will complete the second and final step by confirming receipt of the competencies and expectations.

What are Optional Expectations?

The Optional Employee Expectations section is provided to allow managers to set specific expectations related to the competencies, providing further guidance to the employee during the performance period. During the evaluation, managers may use the optional expectations to provide examples for how the employee did or did not fulfill the competencies. Employees are only evaluated on the Core Competencies.

How do managers enter optional expectations?

A text box is provided in the Optional Employee Expectations section for managers to enter expectations and specific performance objectives for employees. There are no specific requirements for how to use the text box. Managers may enter the information in whatever format suits them best. Additionally, no character requirement exists for the text box. This is completely optional.

The Part 1: Review of Competencies/Setting Optional Expectations Process will open December 1, and all steps must be completed in Halogen by January 31. Each individual step has an assigned due date. This is to ensure that all steps are able to be completed within the specified timeframe. Please note, these due dates are provided as guidelines, intended to help managers and employees complete their assigned steps in a timely manner. Managers and employees are still able to access and complete their assigned steps after the step’s due date has passed. However, all steps must be completed by January 31. The steps in the process, including the associated due date for each, are listed below:

- Step 1) Manager Reviews Competencies and Sets Optional Expectations – Due by January 5
- Step 2) Employee Confirms Competencies and Optional Expectations – Due by January 31

Managers and employees will complete their assigned step in the Halogen system. Each step in the process has an associated task which is assigned to the person responsible for that step. For directions on how to complete the steps in Halogen, please see the Part 1: Review of Competencies/Setting Optional Expectations in Halogen section.

End-Result of the Part 1: Review of Competencies Process

Upon completion of Part 1: Review of Competencies / Setting Optional Expectations, MCP employees will have a thorough understanding of the Core (& Leadership and Safety, if applicable) Competencies and manager expectations.

Completing the Part 1: Review of Competencies Process in the Halogen software:



The following section explains the 2 steps in the Part 1: Review of Competencies/Setting Optional Expectations Process and provides step-by-step instructions for completing each step in the Halogen system.

Important Note

Tasks for the Part 1 process will show as overdue for any employees hired after January 31. Please disregard the overdue status, employees and managers are not overdue. Halogen requires each process to have one due date; the due date for the Part 1 process is January 31. As such, tasks for employees entered into the process *after* the due date, January 31, will be marked as past due. These tasks are not overdue, and managers and employees are not penalized for overdue tasks.

Part 1: Review of Competencies / Setting Optional Expectations in Halogen

Step 1

Manager reviews competencies and sets optional expectations


PEP begins the performance evaluation process by sending an email to all managers through Halogen to review the competencies for the upcoming evaluation period and to set optional expectations if desired. This step occurs before a meeting with the employee. Once the manager has reviewed the competencies, they must meet with the employee to discuss the competencies and expectations. This meeting occurs outside of Halogen.

Follow the steps below to complete Step 1 in Halogen:

- 1) Click the **Step 1: Review competencies and set optional expectations** task tile.

The screenshot shows a task tile in the Halogen system. At the top, the date '1/5/22' is displayed. The main title of the task is 'Step 1: Review competencies and set optional expectations (1 To-Do)'. Below this, the task is categorized as 'Part 1: Review of Competencies'. Two blue callout boxes provide helpful hints: one on the left explains that the task is associated with 'Part 1: Reviewing Competencies or Part 2: Evaluating Competencies', and one on the right explains that the '(1 To-Do)' indicates the number of employees for whom the task needs to be completed.

- 2) Click the **Edit appraisal** link next to the employee's name.

Employee	↑ Due date
 Hal halogenManager	1/3/22 Edit appraisal

Helpful Hint

Halogen will list the names of all the employees for whom the task needs to be completed. In this example, the manager only has one employee for whom they need to complete the task.

Helpful Hint

Click the Edit Appraisal link next to the employee's name for whom you wish to complete the step. Halogen will then redirect you to the proper form.

- 3) Review the competencies in the form to ensure you can sufficiently explain them to the employee. *If desired, specific expectations related to the competencies may be set in the **Optional Expectations box**, located below the Leadership & Safety Competencies section, to provide further guidance to the employee during the performance period.* For additional information on the Optional Expectations box, please see the next section, titled Optional Expectations. Once finished in the form, click **Complete** to finish the task, after which the system will automatically complete a spellcheck and language check. This action automatically moves the form to **Step 2: Employee Confirms Competencies and Expectations**. Managers must meet with the employee *prior* to the employee's completion of Step 2 to discuss the competencies and expectations. This meeting occurs outside of the Halogen system.

Helpful Hint
Clicking **Save Changes** will not complete the task. This only saves the work which has been completed thus far.

If I don't want to set any optional expectations for my employee, do I need to fill anything out on the form?

After clicking Complete, Halogen will automatically run a spellcheck and language check and will notify you of any misspelled or inappropriate words. Once completed, a box will appear to confirm completion of the step. **Click OK to complete the step.**

Spell Checker
Spell Check Completed.
(No errors found)
Close

Language Checker
Language Check Completed.
(No errors found)
Close

global.hgncloud.com says
Once you complete the step, you will not be able to modify the section(s) you are currently editing.
Click OK to save or click Cancel to return to the form.
OK Cancel

Step 2

Employee confirms competencies and expectations

This step is a confirmation by the employee that the manager has reviewed the competencies and expectations with them.

Follow the steps below to complete Step 2 in Halogen:

- 1) Click the **Step 2: Employee confirms competencies and optional expectations** task tile. Halogen will automatically display the form.

Helpful Hint
The due date for the task can be found in the top-left corner of the task tile.

Helpful Hint
Look at the bottom of the task tile to find out which part of the process the task is for, either Part 1: Review of Competencies or Part 2: Evaluating Competencies.

- 2) Click the **Complete** button located in the top-right corner of the form to confirm receipt of the competencies and expectation.

Helpful Hint
You must click **Complete** to finish the task. Clicking **Save Changes** will only save the information in the form and will not complete the step.

After clicking **Complete**, Halogen will automatically run a spellcheck and language check and will notify you of any misspelled or inappropriate words. Once completed, a box will appear to confirm completion of the step. **Click OK to complete the step.**

Optional Expectations Box

During Step 1, Manager reviews competencies and sets optional expectations, managers have the option to set specific expectations in the Optional Expectations box provided.

The Optional Expectations box enables managers to set specific objectives related to the Core Competencies for employees. The box provides documentation of the specific expectations given to employees at the beginning of the performance period. Employees will not be rated or evaluated on any expectations entered into the Optional Expectations box. However, during the evaluation, managers may use the employee's progress toward accomplishing such expectations to justify the ratings provided for the Core Competencies (&Leadership and Safety Competencies, if applicable). This allows the manager to incorporate the objectives into the employee's evaluation.

The Optional Expectations Box does not have any requirements. Managers may choose to enter as many, or as few, expectations or objectives as desired. Any text entered into the box will also appear in the evaluation form during the Part 2: Evaluating Competencies Process, so managers can easily view the expectations that were written. While the expectations or objectives in the box are not rated, employee progress on these expectations may be used to justify or explain the ratings provided for the Core Competencies.

Optional Employee Expectations for Competencies

At the manager's discretion, specific expectations related to the competencies may also be set in this section to provide further guidance to the employee during the performance period.

During the evaluation, managers may use the optional expectations to provide examples for how the employee did or did not fulfill the competencies. Note that employees are evaluated on the Core Competencies, not these specific expectations.

ENTER OPTIONAL EXPECTATIONS IN THE TEXT BOX BELOW.

Text entered in the Optional Expectations box will flow into the Goals Section upon completion of the Part 1: Review of Competencies process. The information will appear as one goal, located in the Goals Section on the Halogen homepage. The title of the goal will always be Part 1: Review of Competencies, since the information contained in the goal is pulled from the Optional Expectations box in the Part 1: Review of Competencies process. Click on the goal to view additional information or to update your progress.

5%

[Part 1: Review of Competencies] [Op...]

No due date

5%

Text from the Optional Expectations box will appear under Description.

Title
[Part 1: Review of Competencies (test)][Optional Competency-Related Expectations]
Goal 1

Due date 📅

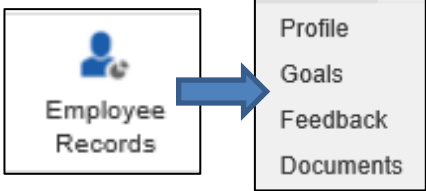





Description
Optional expectations listed in the Part 1 form will be pushed through to the Goals Section on the Halogen homepage once the process is completed.

Start date 📅 **Completed date** 📅

Process
Part 1: Review of Competencies (test)

Important Icons & Buttons

Part 1: Review of Competencies / Setting Optional Expectations

 <p>Employee Records Button</p>	<p>The Employee Records button is located in the top-left area of the form and can be used to access an employee’s information, such as their profile, goals, and any feedback sent or received pertaining to the employee. This feature allows the manager to view information about the employee for whom they are completing the task while in the form. Managers and employees both have access to this button.</p>
 <p>Appraisals Button</p>	<p>The Past Appraisals button is located in the top-left area of the form and can be used to access the employee’s past forms, such as evaluations, for whom the form is being completed. After clicking the Appraisals button, select Past Appraisal from the drop-down menu, and Halogen will display the list of processes applicable to that employee, such as the 2017 Evaluation process. Click on the desired process to see its respective form.</p>
 <p>Complete Button</p>	<p>The Complete button is located in the top-right corner of the form. Click to complete the task, this automatically moves the form to the next person in the process.</p>
 <p>Save Changes Button</p>	<p>The Save Changes button is located in the top-right corner of the form. Click to save work done thus far in the form. This will <u>not</u> complete the task. Clicking save only saves the work completed in the form, allowing the employee or manager to return at a later time to finish completing the task.</p>
 <p>Spelling Icon</p>	<p>The Spellcheck icon is located in the top-left area of the form. Employees and managers can click the icon to complete a spellcheck. However, Halogen automatically completes a spellcheck once the Complete button has been clicked to finish the step.</p>
 <p>Language Check Icon</p>	<p>The Language check icon is located in the top-left area of the form. Employees and managers can click the icon to complete a language check, to ensure no inappropriate or offensive language is in the form. However, Halogen automatically completes a language check once the Complete button has been clicked to finish the step.</p>

<div data-bbox="441 197 583 331" data-label="Image"> <p>Print</p> </div> <p data-bbox="451 365 573 394">Print Icon</p>	<p>Click the Print icon to print a copy of the form you are currently in.</p>
<div data-bbox="370 541 675 611" data-label="Image"> </div> <p data-bbox="358 653 667 682">Attach Feedback Button</p>	<p>The Attach feedback button can be found in Part 1 & 2 of the Competency form below the Optional Expectations section. The button is accessible only to managers. Managers may use this button to attach feedback relevant to the employee whose form is being completed. Halogen will automatically provide a list of feedback, both sent and received, related to the employee for managers to select from.</p>
<div data-bbox="212 785 805 1255" data-label="Image"> </div>	<p>The Create a new goal link on the homepage is accessible to both managers and employees; either party can click on this link to add personal goals and, once added, can update goals. Managers may use this feature to set and track specific objectives and expectations for employees, if desired. However, <u>employees are only evaluated on the Core Competencies at the end of the year, not on goals.</u> If related to the competencies, managers may use the objectives or expectations to further explain how an employee did or did not fulfill the competencies during the evaluation period.</p>

PERFORMING

- ✓ *The manager should keep the employee engaged throughout the entire evaluation period. Engagement includes regular check-ins through meetings, discussions, and informal feedback.*

The performing process is also referred to as coaching. This is where the employee performs the work and is guided or *coached* by the manager throughout the evaluation period. This part of the performance evaluation process should be accompanied by high levels of engagement by both the manager and the employee. By the end of the evaluation period, a proper performing/coaching process will result in few to no surprises by either party regarding the employee's performance. Halogen is designed to enable managers and employees to stay actively engaged in the process by providing feedback and comments and, if desired, setting and updating goals.

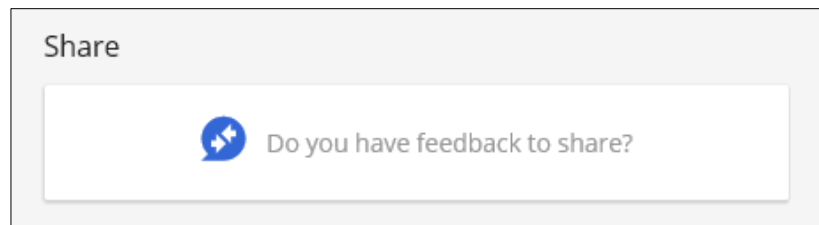
Providing Comments and Feedback in Halogen:

Manager Feedback Types

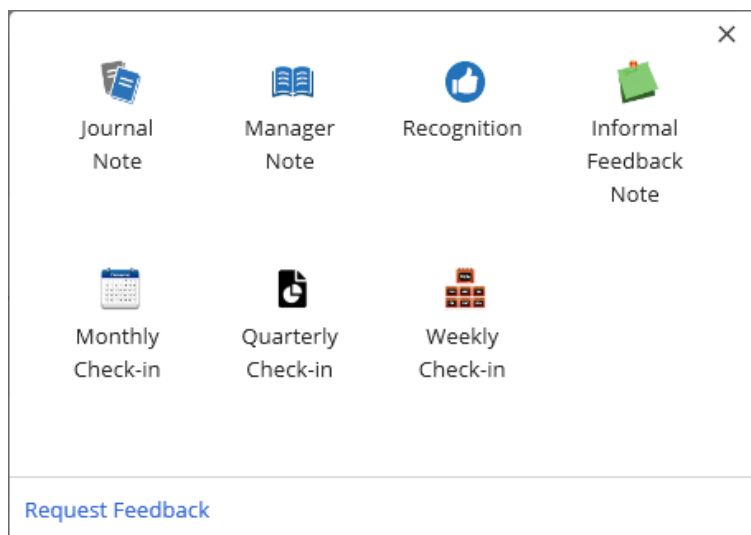
In addition to staying engaged with the employee in person, managers can use the Feedback section in Halogen to document excellent or other types of performance during the evaluation period and to record performance discussions or check-ins with employees. These comments are stored in Halogen and, at the manager's discretion, can be shared with the employee. During the evaluation, managers can access these comments and feedback and attach them to the employee's evaluation.

To give comments and feedback, follow the below steps:

- 1) Click the **Do you have feedback to share?** Link located on the homepage.



- 2) Select the type of feedback you would like to share: **journal note, manager note, recognition, informal feedback note, monthly check-in, quarterly check-in, or weekly check-in**; or select **request feedback** to request feedback from an employee or manager.

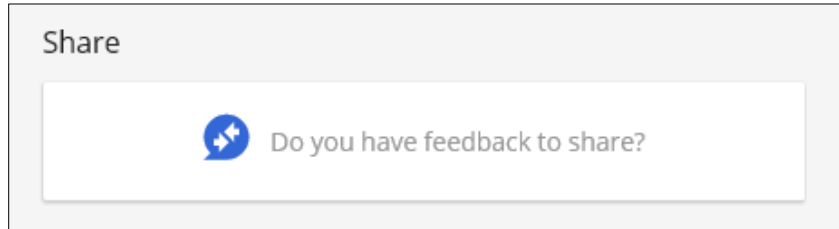


Employee Feedback Types

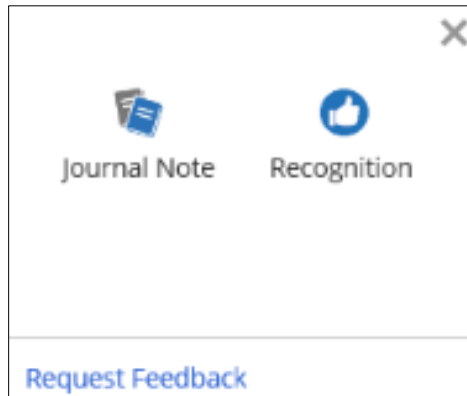
In addition to staying engaged with the manager in person, the employee can use the Feedback section in Halogen to respond to the manager's comments, request feedback, or enter journal notes to document their performance during the year. These notes are recorded and can be viewed by the manager in Halogen.

To create feedback, follow the below steps:

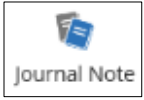
- 1) Click the **Do you have feedback to share?** Link located on the homepage.



- 2) Select the type of feedback you would like to share: **journal note or recognition**; or select **request feedback** to request feedback from another employee or manager.



Feedback Types: What does each mean?



Journal Note: A comment or statement written by the employee. Because we are all employees, both employees and managers have access to this feedback type. Journal notes can be used by employees to document their own performance during the year. This type of feedback provides the author the option to share their journal note with their manager by clicking the **Share with management** box. Clicking the Share with management box notifies the manager that a journal note has been entered by the employee. However, even if the box is not clicked, managers will still be able to view all feedback associated with their direct reports.

Because journal notes are used to document your own performance, Halogen will automatically fill in your name as the recipient of the journal note. Once finished, click **Send** to save the journal note.

The screenshot shows a 'Journal Note' form with the following elements and callouts:

- Title:** Journal Note (with a blue information icon 'i'). Callout: "Click the blue i icon for a brief definition of a journal note".
- Recipient:** Landon halogenEmployee (circled in red). Callout: "Halogen will automatically fill in the name of the person creating the journal note here."
- Subject:** Subject
- Rich Text Editor:** Includes bold (B), italic (I), underline (U), bulleted list, numbered list, and link icons.
- Share with management:** A checkbox. Callout: "Click to share the journal note with your direct manager. When shared, the note will appear in the manager's Feed."
- Buttons:** Send (blue) and Cancel (grey). Callout: "Click the Send button once the note is finished".



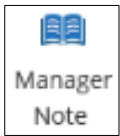
Recognition: An acknowledgement of an achievement; employees and managers both have the option to send recognition feedback to other MCP/HACP employees and managers. Type in the name of the employee you would like to send the recognition to in the **To** field. Recognitions can be sent to recognize employees or managers for an accomplishment on a project, for going above and beyond, etc.

The screenshot shows a dialog box titled "Recognition" with a blue information icon (i) in the top left corner. The dialog box contains the following fields and elements:

- To:** A text input field for the recipient's name.
- Subject:** A text input field for the subject of the recognition.
- Suggestions:** A section showing a link labeled "Yourself".
- Rich Text Editor:** A toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Link.
- Buttons:** "Send" and "Cancel" buttons at the bottom right.

Callout boxes provide the following instructions:

- Click the blue **i** icon for a brief definition of a recognition.
- Type in the name of the employee or manager to whom the recognition is being sent.
- The names of employees to whom Halogen recommends sending the recognition to, including the name of the person sending the recognition, will automatically be listed here as a link. Click the link and these employees will be listed in the **To** field.
- Click the **Send** button once the note is finished.



Manager Note: An observation of an employee’s performance, an informative commentary or piece of information to help employee development, or a general statement or comment about the employee written by the manager. Only managers are able to create manager notes. Managers have the option to share their note with the employee by clicking the **Share with employee** box. If this box is not clicked, the employee will not be able to see the note.

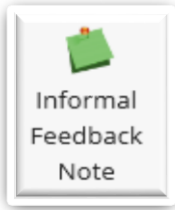
To create a manager note, type the name(s) of the employee(s) whom the note is about in the **To** field; managers must type the name(s) of the employee(s) here, regardless of whether or not they are sharing the note with the employee. Once the note is finished, click **Send**.

The screenshot shows a 'Manager Note' dialog box with the following components and callouts:

- Header:** 'Manager Note' with a blue information icon (i) and a close button (X). Callout: 'Click the blue (i) icon for a brief definition of a manager note.'
- To field:** A text input field. Callout: 'Type the name(s) of the employee(s) whom the note is about. Typing an employee’s name does not mean the note will be sent to them. This field is to designate who the note is about, not who the note will be sent to.'
- Subject field:** A text input field. Callout: 'The names of employees to whom Halogen recommends sending the note to will automatically be listed here as a link. Click the link and these employees will be listed in the To field.'
- Suggestions:** A list of suggestions, currently showing 'Direct Reports'. Callout: 'The names of employees to whom Halogen recommends sending the note to will automatically be listed here as a link. Click the link and these employees will be listed in the To field.'
- Rich Text Editor:** A toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Link.
- Share with employee:** A checkbox labeled 'Share with employee'. Callout: 'Click to share the manager note with your employee. This allows the employee to see the manager note; however, they cannot edit or add to the content of the note.'
- Buttons:** 'Send' (blue) and 'Cancel' (grey). Callout: 'Click the Send button once the note is finished.'

Additional Feedback Types for Managers:

Managers have access to four additional feedback types, including the informal feedback note and weekly, monthly, and quarterly check-ins. These feedback types enable managers to quickly document check-ins and performance discussions in Halogen. Managers can choose which feedback types to utilize throughout the year.



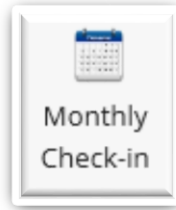
Informal Feedback Note

Document informal performance discussions and feedback.



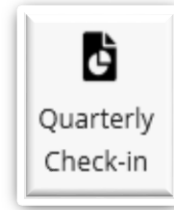
Weekly Check-in

Document weekly performance discussions and feedback.



Monthly Check-in

Document monthly performance discussions and feedback.



Quarterly Check-in

Document quarterly performance discussions and feedback.

Managers can view any feedback associated with their direct report, including feedback provided by the manager, the employee themselves, or another MCP employee. Halogen organizes this feedback based on the feedback type that was selected.

The names of employees to whom Halogen recommends sending the note to will automatically be listed here as a link. Click the link and these employees will be listed in the **To** field.

Type the name(s) of the employee(s) whom the note is about. Typing an employee's name does not mean the note will be sent to them. This field is to designate who the note is about, not who the note will be sent to.

Each feedback type uses the same template or format and resembles an email.

Weekly Check-in ⓘ

To _____

Subject _____

Suggestions: [Direct Reports](#)

B I U [List Icon] [Text Icon] [Align Icon] [Link Icon] [Image Icon]

Share with employee

Send **Cancel**

Click the **Send** button once the note is finished.

Goals & Expectations

Employees and managers can also stay engaged throughout the performance period by utilizing the Goals section located on the homepage. Managers can utilize this section to set goals and expectations for employees, if desired, and employees can also set goals for themselves. Once a goal has been set, managers and employees have the ability to update the goal's status, to change the percentage of the goal completed, to flag the goal as on track, not on track, or at risk, and to add comments regarding progress toward completing the goal.

To set and update goals, follow the steps below:

- 1) On the homepage, go to the **Goals** section. Click the **Create a new goal link** or the **blue plus sign** to add a goal, or click on the goal you would like to update. You can also click **All Goals** to see a complete list of your goals; click on a goal from the list to update it.

The screenshot shows the 'Goals' section of the Halogen system. At the top left, the word 'Goals' is followed by a blue plus sign icon. Below this, there are two goal cards. The first card shows a progress indicator with '0%' and a grey circle. The second card shows a large grey plus sign and the text 'Create a new goal'. At the bottom of the goal cards, there is a red text indicator '2 weeks overdue' and a button labeled 'All Goals'.

Each goal displayed is a link. Click on a goal to view additional details and to update progress made.

Employees and managers can update the percentage of the goal completed by clicking on the grey circle.

Employees and managers have the ability to create goals in Halogen by clicking the **Create a new goal link** or the blue **plus sign** link in the top-left corner. During the evaluation, managers may use these goals to justify or explain how an employee did or did not fulfill the Core Competencies. Employees are not evaluated on the goals themselves though.

Helpful Hint
In the **Goals** section on the homepage, the name of each goal is displayed along with the percent currently completed. In the above example, the employee has currently completed 0% of their goal, Goal 2. Halogen will also display the amount of time overdue if the goal's due date has passed.

- To update or view additional information about a goal, simply click on the desired goal. From here, you can view the goals due date, description, and other important information, in addition to updating progress made toward completing the goal.

Managers and employees can choose to update a goals status, to change the percent completed, to manage the start/due dates and completed date, and to set a progress flag to indicate whether the goal is currently on track, not on track, or at risk. Comments can also be added in the comments box to document progress made toward completing the goal. Each comment will display the date and time entered and the name of the person who entered it. Once you have finished updating the goal, click the blue save button, located in the top-right corner of the window, to save your changes.

To change the percent completed, click and drag the blue dot to the desired percentage.

To add a new comment, a blue save button will appear; click the button to save the comments added.

Goal Details:

- Title: [Training Test Process - Part 1: Review of Competencies][Optional Competency-Related Expectations] Goal 1
- Due date: [Calendar icon]
- Description: Optional expectation related to Customer Focus. Optional expectation related to Diversity and Inclusion. Optional expectation related to Continuous Improvement - James will attend five seminars.
- Start date: [Calendar icon] Completed date: [Calendar icon]
- Process: Training Test Process - Part 1: Review of Competencies

Status Legend:

- On Track
- At Risk
- Not on Track
- No Flag Set

Additional details:

- Created date: 1/22/19 Last modified: 1/22/19
- Send me a reminder: 7 day(s) before the due date
- Then every: 7 day(s)

Comments:

Add new comment

When adding a new comment, a blue save button will appear; click the button to save the comments added.

Save Cancel

PART 2: Evaluating Competencies

✓ The manager should always meet with the employee at the end of the process.

“The performance management process begins and ends with the manager.”

Also known as the performance review process, the evaluating portion is where the planning and performing steps come together to document the employee’s performance. The employee’s manager issues a performance score and rating for each of the 5 Core Competencies. Based on the individual scores and ratings provided by the manager, an overall performance score and rating is then calculated, and comments are made by the second-level manager and appointing authority.

The Part 2: Evaluating Competencies Process takes place at the end of the year and begins with the manager. The process consists of 5 steps, Manager writes evaluation, Second-level manager approves evaluation, Appointing authority approves evaluation, Manager meets with employee to deliver the evaluation, and Employee sign-off. Each year the process will open on December 1 and all steps must be completed in Halogen by January 31.

Each individual step has been assigned a due date to ensure all steps are able to be completed within the specified timeframe. Please note, these due dates are provided as guidelines, intended to help managers and employees complete their assigned step(s) in a timely manner. Managers and employees are still able to access and complete their assigned steps after the step’s due date has passed. However, all steps must be completed by January 31. The steps in the process, including the associated due date for each, are listed below:

Part 2: Evaluating Competencies consists of 5 steps:

- Step 1) Manager Writes Evaluation – Due by December 21
- Step 2) Second-Level Manager Approves Evaluation – Due by December 28
- Step 3) Appointing Authority Approves Evaluation – Due by January 4
- Step 4) Manager Meets with Employee to Deliver Evaluation – Due by January 18
- Step 5) Employee Sign-Off and Comments – Due by January 31

Managers and employees will complete their assigned step(s) in the Halogen system. Each step in the process has an associated task which is assigned to the person responsible for that step. For directions on how to complete the steps in Halogen, please see the Completing Part 2: Evaluating Competencies in Halogen section.

An employee’s evaluation is always comprised of the **5 Core Competencies**.

Employees with supervisory or program management responsibilities and/or safety responsibilities are evaluated on **two** parts:

- **Core Competencies**
 - 5 Core Competencies
- **Leadership & Safety Competencies**
 - 3 Leadership & Safety Competencies

Core Competencies (For all MCP/HACP employees)

Employees are evaluated on their overall job performance relative to the 5 established competencies listed below. The manager will evaluate the employee using specific examples of the employee’s performance during the performance period which relate to the core competencies. The core competencies apply to *all* City of Columbus employees.

Customer Focus (Internal & External)

- Provides requested assistance and/or information in a prompt and courteous manner
- Performs with accuracy and thoroughness
- Anticipates customer needs and seeks ways to improve service delivery
- Recommends customer-focused processes or solutions with due consideration for resource constraints

Accountability For Results

- Assumes personal responsibility for actions
- Performs job duties in a manner consistent with time and quality standards
- Consistently balances quality of work with meeting deadlines
- Effectively manages multiple priorities and anticipates broad workflow needs, including problem resolution

Continuous Improvement

- Demonstrates willingness to do things differently for positive change
- Actively participates in training and other professional development activities or on-the-job opportunities to learn new ways of doing things
- Creates opportunities for process improvements and shares best practices
- Applies new and innovative ways of doing things to everyday work

Operational Efficiencies

- Identifies inefficiencies and recommends or contributes to plans for improvement
- Collaborates and builds internal and external partnerships for responsive, transparent, and effective governance
- Demonstrates awareness that public employees serve as stewards of public funds and resources
- Ensures resources are used in the most effective and prudent manner possible

Diversity and Inclusion

- Fosters a workplace culture of inclusion and unity
- Demonstrates an awareness of, and sensitivity to, the needs and concerns of all people
- Practices verbal and non-verbal communication skills
- Proactively seeks to understand and educate themselves about issues related to diversity and inclusion

Leadership & Safety Competencies

Leadership and/or safety competencies will be included in the evaluations of those employees who have supervisory responsibilities or program management responsibilities, and/or safety responsibilities or related job duties.

Managing Performance

- Leads by example; demonstrates high ethical standards
- Regularly communicates tasks to be achieved to direct reports
- Provides regular, constructive feedback and coaching to direct reports based on performance
- Participates in the performance management process with every direct report, conducting required and appropriate sessions in a timely manner
- Uses recognition programs when appropriate
- Fosters a work environment characterized by mutual respect

Managing Resources

- Maintains appropriate budgetary and asset controls
- Initiates timely and effective corrective action when needed
- Makes effective use of available resources to accomplish goals and meet workload requirements
- Responds to needs for cost containment as required

- Plans and budgets resource requirements for future operational needs
- Uses minimal resources to produce maximum results

Culture of Occupational Safety

- Responds positively to safety-oriented feedback
- Follows all safety rules, proactively works to prevent accidents and complies with safety regulations
- Encourages the use of sound judgment regarding safety throughout the work environment

End-Result of the Evaluation Process:

Upon completion of the Evaluation process, MCP employees will have received an efficient, effective and timely evaluation from their direct manager.

Completing the Evaluation process in the Halogen software:



The following section explains the 5 steps in the Part 2: Evaluating Competencies Process and provides step-by-step instructions for completing each step in the Halogen system. Additional information on the evaluation form and important buttons/icons can be found at the end of this section and in the Forms section.

PART 2: Evaluating Competencies in Halogen

Step 1

Manager Drafts Employee Evaluation

The manager rates the employee on:

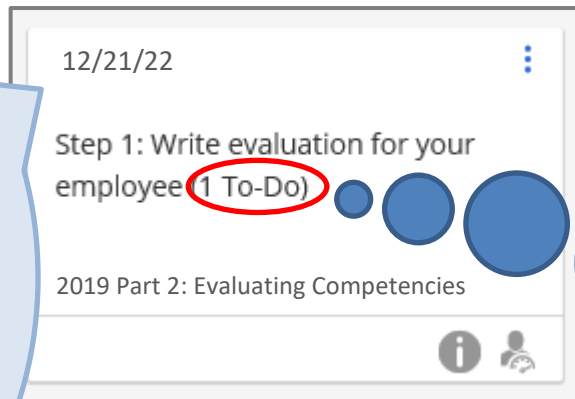
1. The 5 Core Competencies with comments
2. The 2 Leadership Competencies & 1 Safety Competency with comments (if applicable)

Based on the ratings selected by the manager, an Overall Performance Rating is automatically calculated and the manager provides overall comments.

The manager will evaluate the employee on overall job performance relative to the established competencies and expectations. The manager will complete the evaluation using specific examples of the employee's performance during the performance period which relate to the Core Competencies and, if applicable, the Leadership & Safety Competencies. Managers may use optional expectations set during Part 1 to explain how the employee did or did not fulfill the competencies.

Follow the steps below to write the evaluation in Halogen:

- 1) Click the **Step 1: Write evaluation for your employee** task tile.



Helpful Hint
Any tasks that need to be completed will be in the **Tasks** section located at the top of the homepage; go to this section to find out if you have a task to do.

Will I have a separate task tile for each of my direct reports?

No. Managers will only have one task tile set for each task. Halogen will indicate on the task tile the number of employees for whom the task needs completed at that time. Here, this manager currently has **1 employee** for whom this task needs to be completed.

- 2) Click the **Edit Appraisal link**. Halogen will automatically display the form.
- 3) Write the evaluation by providing a rating and comment for each competency and adding final comments in the Overall Manager Review & Comments box. Managers **must** provide a rating *and* comment for each competency in the section. For the Leadership & Safety Competencies section, if the employee does not have supervisory, program management, and/or safety-related responsibilities, select the 'N/A' rating; no comments are required.

Employee	↑ Due date	
JH Jessica halogenEmployee	11/20/22	Edit appraisal
JH Joe halogenEmployee	11/20/22	Edit appraisal
KH Kara halogenEmployee	11/20/22	Edit appraisal
KH Kevin halogenEmployee	11/20/22	Edit appraisal

Helpful Hint
Halogen will list the names of all the employees for whom the task

Once finished, click **Complete**; this action *automatically* moves the form to Step 2: Second-level manager approves evaluation. *Managers are not responsible for sending the evaluation form to the next person in the process.*

Helpful Hint
Click the **Employee Records** button to see information related to the employee, including their profile, goals, and feedback.

Helpful Hint
Click **Save Changes** to save the information entered into the form. Clicking Save Changes will not complete the task. This only saves the work which has

Part 1: Review of Competencies / Setting Opti

Competencies

The competency-reviewing process includes:

A. Core Competencies: The manager reviews the Core Co

B. Leadership & Safety Competencies (if applicable): The

global.hgncloud.com says

Once you complete the step, you will not be able to modify the section(s) you are currently editing.

Click OK to save or click Cancel to return to the form.

OK Cancel

After clicking **Complete**, Halogen will automatically run a spellcheck and language check and will notify you of any misspelled or inappropriate words. Once completed, a box will appear to confirm completion of the step. **Click OK to complete the step.**

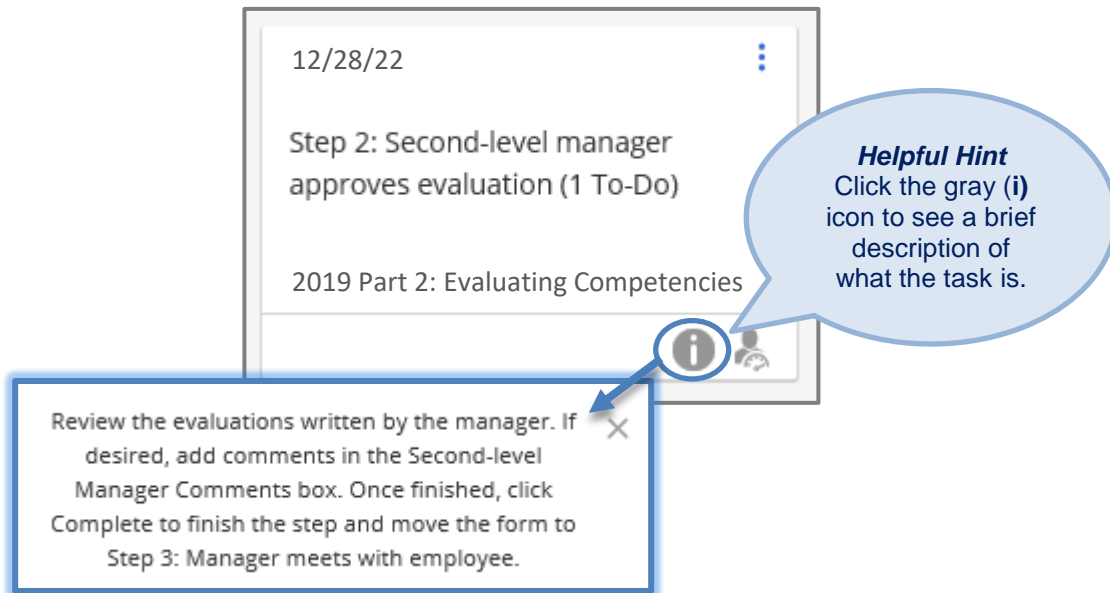
Step 2

Second-Level Manager Approves Evaluation


After the manager writes the evaluation, the second-level manager comments on the employee’s performance and approves the evaluation. This provides the second-level manager with the opportunity to concur, provide additional information, or disagree with the manager if necessary. No performance rating is issued by the second-level manager.

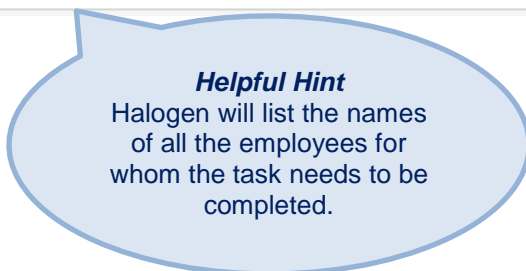
Follow the steps below to approve the evaluation in Halogen:

- 1) Click on the **Step 2: Second-level manager approves evaluation** task tile.



- 2) Click the **Review & Approve link** to review and approve the evaluation form.

Employee	↑ Due date	
 Haley halogenEmployee	11/27/22	Review & approve



- 3) Review the evaluation form and add comments in the second-level manager comment box, if desired. Click **Approve** when you are finished; this action *automatically* moves the form to **Step 3: Appointing Authority approves evaluation**. Second-level managers are not responsible for sending the evaluation form to the next person in the process.

Can the second-level manager 'adjust' or change the ratings given by the manager?

No. The second-level manager cannot change or 'adjust' the ratings given by the manager. Only the manager can set ratings in the form.

Helpful Hint

Clicking **Save** will not complete the task or move the form on to the next step. The second-level manager must click **Approve** to mark the task as completed.

The screenshot shows the 'Performance Evaluation (Part 2: Evaluating Competencies)' form for 'genMana...'. The header includes 'THE CITY OF COLUMBUS' and 'ANDREW J. GINTHER, MAYOR'. The form title is 'Performance Evaluation II'. A navigation bar at the top contains 'Print', 'Employee Records', 'Save Changes', 'Return to Author', and 'Approve' (circled in red). A callout bubble asks 'What if the second-level manager would like the manager to reconsider a rating or comment?' and explains that clicking 'Return to Author' sends the form back to the manager, who can use 'Add Annotation' to suggest changes. Another callout explains that 'Save' does not complete the task, only 'Approve' does. A footer note states: 'A competency is... skills, knowledge and... al capacity and effectiveness. Competencies are listed with accompanying performance descriptions... employee performance based on most, but not necessarily all of the performance characteristics. Competencies... successful level of performance.'

Second-Level Manager Review & Comments

[Empty text box for Second-Level Manager Review & Comments]



Step 3

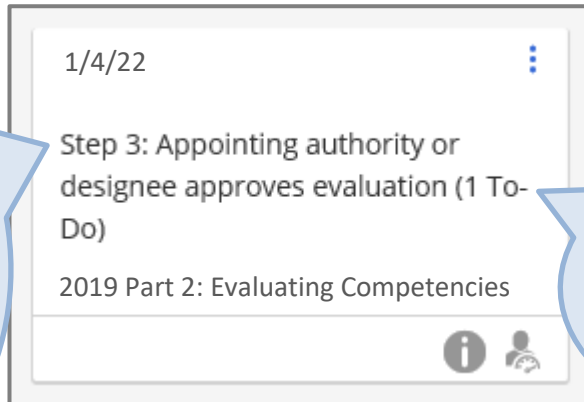
Appointing Authority Approves Evaluation

After the second-level manager approves the employee's evaluation, the Appointing Authority comments on the employee's performance and approves the evaluation. This provides the Appointing Authority with the opportunity to concur, provide additional information, or disagree with the manager or second-level manager, if necessary. No performance rating is issued by the Appointing Authority.

Follow the steps below to approve the evaluation in Halogen:


- 1) Click on the **Appointing authority approves evaluation** task tile.

Helpful Hint
The step number & task name will always be displayed on the task tile, with the process it is associated with, Part 1: Reviewing Competencies or Part 2: Evaluating Competencies, at the bottom of the task tile.



Helpful Hint
Halogen will indicate on the task tile the number of employees for whom the task currently needs completed.

- 2) Click the **Review & Approve** link located next to the employee's name to review and approve the evaluation form.

Employee	↑ Due date	
 Kris halogenManager	1/4/22	Review & approve

Helpful Hint
Halogen will list the names of all the employees for whom the task needs to be completed.

- 3) Review the evaluation form and add comments in the appointing authority comment box, if desired. Click **Approve** when you are finished; this action *automatically* moves the form to **Step 4: Manager meets with employee to deliver evaluation**. Appointing authorities are not responsible for sending the evaluation form to the next person in the process.

Helpful Hint
Use the **Add annotation** icon, located under each section in the evaluation form, to add suggestions or comments for the manager to review when utilizing the **Return to Author** button.

The screenshot shows a web interface for 'Step 3: Appointing authority or designee approves evaluation (Part 2)'. At the top, there is a navigation bar with icons for 'Print', 'Spelling', 'Check Language', 'Employee Records', 'Appraisals', 'Save Changes', 'Return to Author', and 'Approve'. The 'Approve' button is circled in red. Below the navigation bar, the header for 'THE CITY OF COLUMBIUS' is visible, along with the name 'ANDREW J. ...'. The main content area is titled 'Performance' and includes a section for 'Employee Information' with the following details: 'Employee Name: Kris halogenManager', 'Department: Technical Support', and 'Division: Kanata'. A blue thought bubble is overlaid on the page, containing text that addresses a question about the 'Return to Author' button.

*If the appointing authority clicks **Return to Author**, will the evaluation automatically go back to the appointing authority after the manager reviews it?*

No; once the manager reviews it, the evaluation will go to the second-level manager for approval, and then to the appointing authority for approval.

Appointing Authority Review & Comments

A large, empty text input box for providing review and comments.



Step 4

Manager Meets with Employee to Deliver Evaluation

After the second-level manager and appointing authority have provided comments and approved the evaluation, the manager meets with the employee to deliver the final evaluation. The completion of this step is a confirmation by the manager that a meeting occurred with the employee.

Follow the steps below to complete the task in Halogen:

- 1) Click the **Step 4: Manager meets with employee to deliver evaluation** task tile.

The screenshot shows a task tile with the following details: a due date of 1/18/22, a title 'Step 4: Meet with employee to deliver evaluation (1 To-Do)', and a subtitle '2019 Part 2: Evaluating Competencies'. There are information and user icons at the bottom right of the tile.

Helpful Hint
Halogen will indicate the task's due date in the top-left corner of the task tile. If **Not Ready** is displayed on the bottom of the task tile, the task cannot be completed yet; even if it is overdue.

Helpful Hint
Halogen will indicate the number of direct reports for whom the task is ready to be completed. For example, this task tile indicates the manager has only 1 employee for whom they need to complete Step 4 currently.

- 2) After the meeting has occurred, click the **View Appraisal** link to access the form and complete the task.

Employee	↑ Due date	
Kris halogenManager	1/18/22	View appraisal

Helpful Hint
Clicking the **View Appraisal** link will automatically redirect you to the employee's evaluation form, where you can then mark the task as completed.

- 3) Click **Mark Complete** to complete the task; this action *automatically* moves the form to **Step 5: Employee sign-off**. Managers are not responsible for sending the evaluation form to the next person in the process. Managers must mark the task as completed in order for the form to move to the employee for the final step.

Helpful Hint
To print a copy of the employee's evaluation form, click the print icon.

Can my employee see their evaluation in Halogen prior to our meeting?

No. Employees will not be able to view their evaluations in Halogen until after this step. Managers can print a copy of the employee's evaluation to give to the employee during their meeting, if desired.

Print Spelling Check Language Employee Records Appraisals Save Changes **Complete**

THE CITY OF COLUMBUS
ANDREW J. GINTHER, MAYOR
Performance Excellence Program
2022

Employee Information

Employee Name: Joe halogenEmployee
Department: Technical Support
Division: Kanata

Part 1: Review of Competencies / Setting Optional Ex...

Competencies

The competency-reviewing process...

A. Core Competencies: The...

B. Leadership & Safety ... Occupational Safety competency, if applicable.

Can I edit the evaluation during this step?

No. Managers are not able to edit the form during this step. To edit the evaluation, the form must be rolled back to Step 1, Manager writes evaluation, and go back through the approval process (Step 2, Second-level manager approves evaluation, and Step 3, Appointing authority approves evaluation).

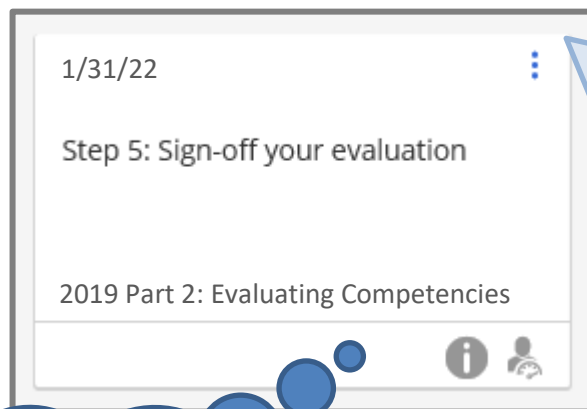
Step 5

Employee Sign-Off and Comments

After meeting with the manager and reviewing comments from the second-level manager and appointing authority, the employee is provided with the opportunity to comment on the evaluation and acknowledges the receipt of the evaluation through an electronic signature. There is no requirement for the employee to agree with the evaluation. The manager retains their right to accurately evaluate the employee's performance based on observed and documented behavior.

Follow the steps below to sign-off on the evaluation in Halogen:

- 1) Click the **Step 5: Sign-off your Evaluation** task tile to access the evaluation form.



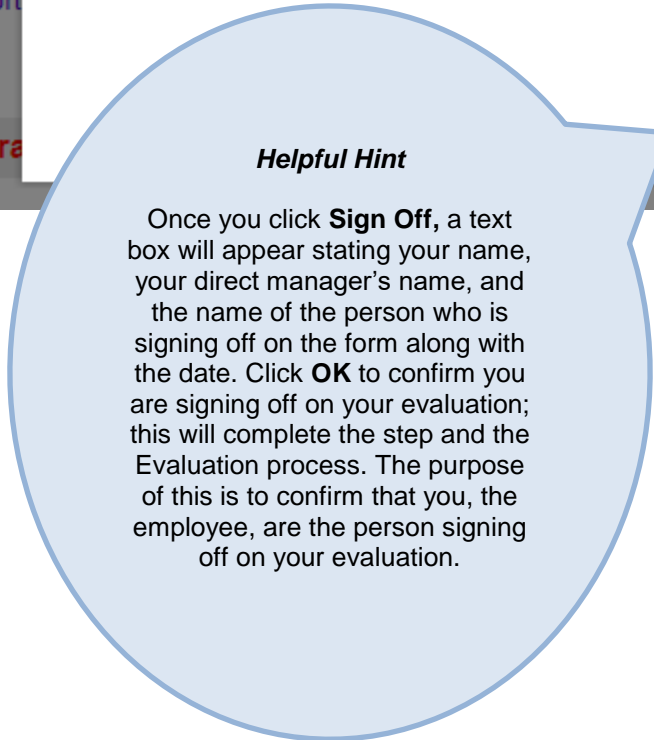
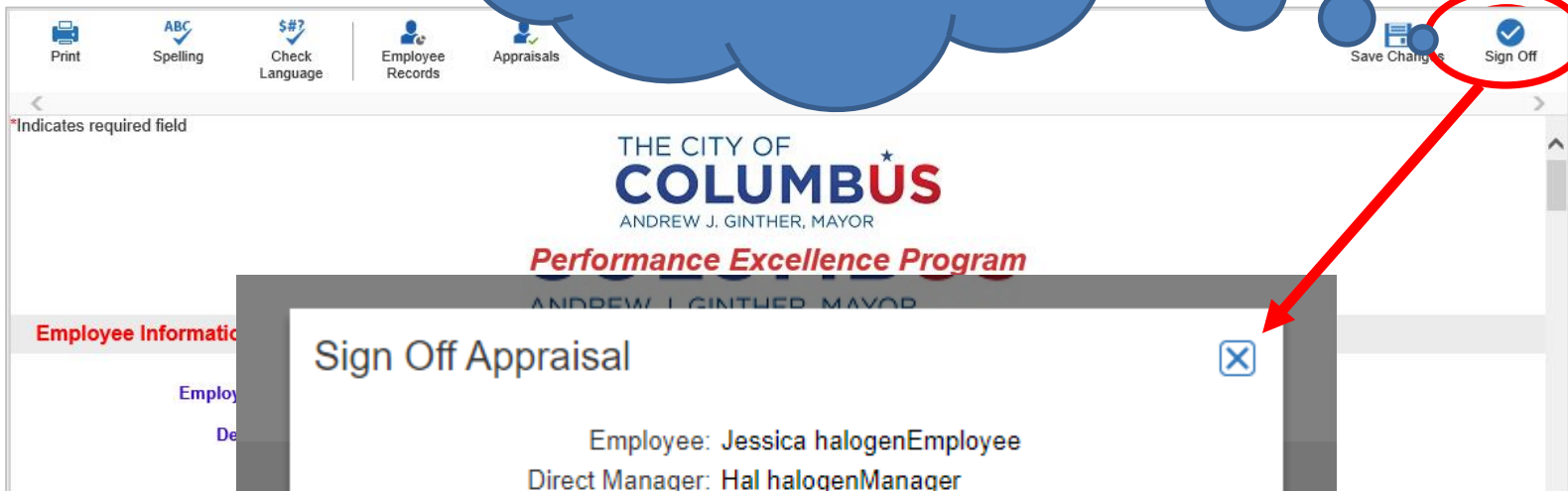
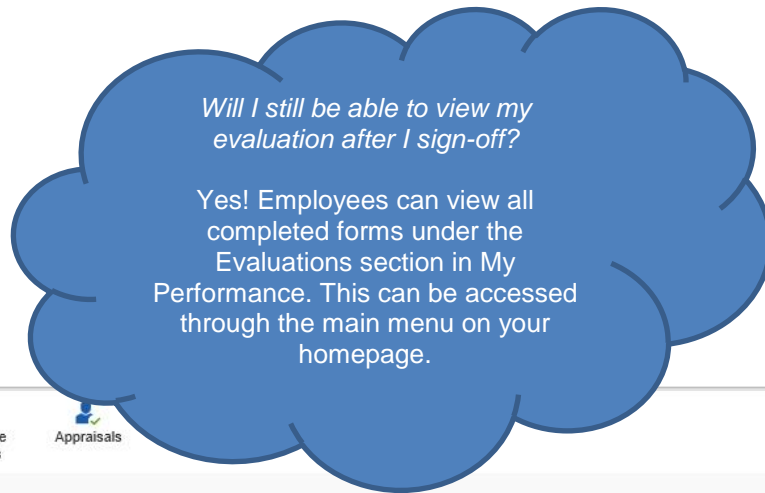
Helpful Hint

Any tasks that need to be completed can be found in the **Tasks** section. Halogen will always direct you to the appropriate form when you click on the task; you should never have to search for a form to complete a task.

How do I know what task I am completing?

Halogen will always display the name of the task and the associated step on the task tile. For example, this task tile is for Step 5 and is directing you, the employee, to sign-off on your evaluation.

- 2) Click the **Sign Off** button located in the top-right corner of the form to complete the step and the evaluation process. If desired, employees may also add comments in the **Employee Comments box** located at the bottom of the page.



Form Views for Part 2: Evaluating Competencies

Evaluation Form: Manager View

The screenshot shows the 'Evaluation Form: Manager View' interface. At the top, there is a navigation bar with several icons: a printer icon for 'Print', a spelling checker icon for 'Spelling', a language checker icon for 'Check Language', a person icon for 'Employee Records', and a person with a checkmark icon for 'Appraisals'. On the right side of the navigation bar, there are 'Save Changes' and 'Complete' buttons. The main content area features the City of Columbus logo and the text 'Performance Excellence Program 2021'. Below this, there is a section titled 'Employee Information' with the text 'Employee Name: Jessica halogenEmployee'. Several callout boxes provide instructions: 'Print Icon/Check Language Icon' points to the printer icon; 'Click to see records for employee, such as the employee's profile, goals, and any feedback sent or received pertaining to the employee.' points to the 'Employee Records' icon; 'Click to see past forms completed for the employee, including previous goal-setting, evaluation, and probationary forms.' points to the 'Appraisals' icon; 'Click to save any work completed thus far; this does not complete the step or move the form on to the next person' points to the 'Save Changes' button; and 'Click to finish the step and move the form on to the next person in the evaluation process. This action will automatically move the form to the person responsible for the next step.' points to the 'Complete' button. A 'Print Icon' callout points to the printer icon in the main content area.

Print Icon/Check Language Icon

Click to see records for employee, such as the employee's profile, goals, and any feedback sent or received pertaining to the employee.

Click to see past forms completed for the employee, including previous goal-setting, evaluation, and probationary forms.

Click to save any work completed thus far; this does **not** complete the step or move the form on to the next person

Click to finish the step and move the form on to the next person in the evaluation process. This action will *automatically* move the form to the person responsible for the next step.

Print Icon

Print Spelling Check Language Employee Records Appraisals Save Changes Complete

*Indicates required field

THE CITY OF COLUMBUS
ANDREW J. GINTHER, MAYOR

Performance Excellence Program
2021

Employee Information

Employee Name: Jessica halogenEmployee

Evaluation Form: Second-level Manager and Appointing Authority View

Print Icon

Click to see past forms completed for the employee, including previous goal-setting, evaluation, and probationary forms.

- Only visible for second-level managers and appointing authorities
- Click to send evaluation form back to the direct manager for review
- Use the **Add annotation** icon to add notes for the manager to review

Click to approve the evaluation form and complete the step; this action will **automatically** move the form on to the next person in the evaluation process.

Print Spelling Check Language Employee Records Appraisals Save Changes Return to Author Approve

*Indicates required field

Click to see records for employee, such as the employee's profile, goals, and any feedback sent or received pertaining to the employee.

Click to save any work completed thus far; this does **not** complete the step or move the form on to the next person

THE CITY OF COLUMBU
ANDREW J. GINTHER, MAYOR
Performance Excellence 2018

Add Annotation

Helpful Hint

When utilizing the **send back to author** button, use the **add annotation** icon to add specific notes for the manager to review. The icon is located underneath the second-level manager and appointing authority comments boxes. Once you click the icon, the **Annotation Details** box will appear where you can then write your notes.

Annotation Details [X]

Section: 2nd Level Manager Review & Comments

Previous Annotations: (Most Recent First)

New Annotation:

Entered By: LAUREN HERDERICK

OK Cancel

Evaluation Form: Employee View

The screenshot shows the top navigation bar of the evaluation form. It includes icons for Print, Spelling, Check Language, Employee Records, Appraisals, Save Changes, and Complete. Callout boxes provide instructions for each:

- Print Icon:** Click to view completed forms from past processes, such as evaluation forms and goal-setting forms.
- Spellcheck Icon:** Click to save any work completed thus far; this does **not** complete the step or move the form on to the next person.
- Check Language Icon:** Click to sign off on your evaluation and complete the evaluation process.
- Employee Records Icon:** Click to see your profile, feedback pertaining to you, or goals.

The main content area displays the City of Columbus logo and the text: "Performance Excellence Program 2021". Below this, the "Employee Name" is listed as "Jessica halogenEmployee".

The "Sign Off Appraisal" dialog box contains the following information:

- Employee: Natasha halogenEmployee
- Direct Manager: Nathan halogenManager
- Signed Off By: LAUREN HERDERICK as Natasha halogenEmployee
- Sign-off Date: 11/30/18

Buttons for "OK" and "Cancel" are visible at the bottom of the dialog. A "Helpful Hint" callout box states: "Once you click **Sign off**, a box will appear containing your name, your manager's name and the name of the person who is signing off on the form. Click **OK** to sign off on your evaluation and complete the step."

Employee Records Button

The **Employee Records** button allows managers to view the employee's profile, goals, and any feedback associated with the employee.

Click the Employee Records button to view the drop-down menu. From there, you can select to see the employee's profile, goals, or feedback the employee has sent or received.

When writing the evaluation, managers can utilize the Employee Records button to access information regarding the employee's profile, goals, or feedback while still in the evaluation form. Halogen displays the selected information and the evaluation form in a side-by-side format, and managers can still edit the evaluation form while viewing the information. This allows managers to view an employee's goals, profile, or feedback while writing the employee's evaluation.

Competency	Ratings Scale (select rating)	Comments (add comments)	Score
Customer Focus (Internal & External) - Provides requested assistance and/or information in a prompt and courteous manner. - Performs with accuracy and thoroughness - Anticipates customer needs and seeks ways to improve service delivery. - Recommends customer-focused processes or solutions with due consideration for resource constraints.		Managers can view an employee's goals, including any updates to the goal, while completing the evaluation.	
Accountability For Results - Assumes personal responsibility for actions.			

Appraisals Button

The **Appraisals** button allows managers to view the employee's past forms from completed processes, such as the evaluation and goal-setting.

Click **Past Appraisals** to view the list of available processes.

Save Changes Return to Author Approve

THE CITY OF COLUMBUS
ANDREW J. GINTHER, MAYOR
Performance Excellence Program

Employee Records - Past Appraisals

Processes:

- 2015 Performance Plan Process - Goal setting
- 2017 PEP Goal-Setting
- Annual Evaluation Process
- Competency-Evaluation Process - Test 2
- TEST 2 - Step 4 Evaluation Process

Select the form you would like to view from the list of processes. For example, to view the 2017 Goal-Setting form, select 2017 PEP Goal-Setting from the list. Once selected, click OK.

OK Cancel

Halogen will automatically display the selected form, allowing managers to view previous forms without leaving the form they are currently working in. Once finished, click the blue x circled below to resume using the form in use.




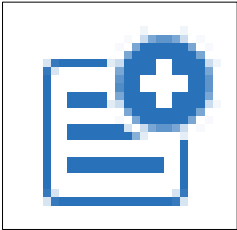
Employee Records: Joe halogenEmployee (Read Only)

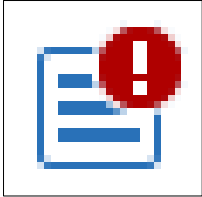
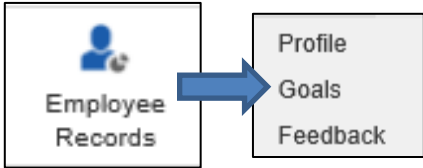




THE CITY OF COLUMBUS
ANDREW J. GINTHER, MAYOR
Performance Excellence Program



Employee Data

Employee Name: Joe halogenEmployee Department: Technical Support

Important Icons & Buttons
Part 2: Evaluating Competencies

 <p>Suggested Comments</p>	<p>The Suggested Comments icon is available for managers to use during Step 1: Manager writes the evaluation and is located under each competency in the Core Competencies and Leadership & Safety Competencies sections. Click the icon to find suggested comments based on the rating that was selected for the competency; managers can also select the employee's gender so the appropriate pronouns are filled in when the comment is generated by Halogen. This feature is available in all competencies sections in the evaluation form.</p>
 <p>Attach Feedback</p>	<p>The Attach feedback icon is located under the Core Competencies, Leadership & Safety Competencies, and Optional Expectations sections. Click the icon to attach feedback provided during the performance period to the evaluation form. Managers can attach feedback given by other managers or employees during the performance period in addition to their own feedback. Employees cannot attach feedback for their own evaluation.</p>
 <p>Return to Author</p>	<p>The Return to Author button is available for second-level managers and appointing authorities to utilize during their respective approval steps, Steps 2 & 3, and is located in the top-right corner of the form. Second-level managers and appointing authorities may use this button to send the employee's evaluation back to the manager for additional review. To send the evaluation back to the manager, click the Return to Author button, and Halogen will automatically send the form to the manager.</p>
 <p>Add Annotation</p>	<p>The Add annotation icon can be used by second-level managers and appointing authorities when utilizing the Return to Author button during Step 2: Second-level manager approves evaluation and Step 3: Appointing authority approves evaluation; the icon is located under each section in the evaluation form, including the designated comment boxes at the bottom. Click the icon to add notes when sending the evaluation back to the manager for review; this can help the manager identify which sections of the evaluation need to be reviewed, in addition to the recommended edits provided. Annotations added by the second-level manager and appointing authority are not visible on the form once the evaluation is finalized.</p>

 <p>Review Annotation</p>	<p>The Review annotation icon is only applicable to the manager; the icon appears on the evaluation form when the second-level manager and/or appointing authority has sent the evaluation back to the manager with annotations added. Click the icon to review the annotation(s) added by the second level manager and/or appointing authority. The icon will appear under the section(s) where the annotation(s) was added. Managers <u>must</u> review the annotation(s) <u>before</u> clicking Complete to finish the task again; Halogen will not allow the manager to move on until they have clicked on and reviewed the annotation(s).</p>
 <p>Employee Records Button</p>	<p>The Employee Records button is located in the top-left area of the form and can be used to access an employee's information, such as their profile, goals, and any feedback sent or received pertaining to the employee. This feature allows the manager to view information about the employee for whom they are completing the task while still in the form. Managers and employees both have access to this button.</p>
 <p>Past Appraisals Button</p>	<p>The Appraisals button is located in the top-left area of the form and can be used to access the employee's past forms, such as evaluations, for whom the form is being completed. After clicking the Appraisals button, select Past Appraisal from the drop-down menu, and Halogen will display the list of processes applicable to that employee, such as the 2017 Evaluation process. Click on the desired process to see its respective form.</p>
 <p>Complete Button</p>	<p>The Complete button is located in the top-right corner of the form. Click this button to complete the task; this automatically moves the form to the next person in the process.</p>
 <p>Save Changes Button</p>	<p>The Save Changes button is located in the top-right corner of the form. Click to save work done thus far in the form. This will <u>not</u> complete the task. Clicking save only saves the work completed in the form, allowing the employee or manager to return at a later time to finish completing the task.</p>
 <p>Spellcheck Icon</p>	<p>The Spellcheck icon is located in the top-left area of the form. Employees and managers can click the icon to complete a spellcheck. However, Halogen automatically completes a spellcheck once the Complete button has been clicked to finish the step.</p>

 <p>Language Check Icon</p>	<p>The Language check icon is located in the top-left area of the form. Employees and managers can click the icon to complete a language check, to ensure no inappropriate or offensive language is in the form. However, Halogen automatically completes a language check once the Complete button has been clicked to finish the step.</p>
 <p>Attach Documents</p>	<p>The Attach documents icon is located under the Supporting Documents section. Click the icon to attach documents to the evaluation form.</p>

Evaluating Competencies: Scores & Ratings

Core Competencies and Leadership & Safety Competencies Score & Rating

Managers must rate employees on the Core Competencies and, if applicable, Leadership & Safety Competencies in the evaluation form by selecting one of five rating options. Each rating is assigned a numerical value which constitutes that rating's score. In essence, each competency will receive a rating *and* a score. The score associated with each rating is preset and cannot be altered by managers. The ratings, and their associated scores, are as follows:


- *Exceptional*: Performance is consistently superior and significantly exceeds competency expectations
 - Associated score = 5
- *Highly Successful*: Performance consistently exceeds competency expectations
 - Associated score = 4
- *Successful*: Performance consistently meets competency expectations
 - Associated score = 3
- *Below Expectations*: Performance meets some, but not all competency expectations
 - Associated score = 2
- *Needs Improvement*: Performance consistently fails to meet competency expectations
 - Associated score = 1
- For Leadership & Safety Competencies, a **Not Applicable (N/A)** rating is listed in addition to the above ratings.
 - Associated score = No associated score; this rating is not factored in by Halogen when calculating the overall section score/rating or the overall performance score/rating.

Based on the associated scores of the individual ratings given by the manager for each competency, Halogen will calculate an overall rating and score for the section.

Core Competency Section

Competency	Ratings Scale	Comments:	Score
Customer Focus <ul style="list-style-type: none"> • Builds and maintains customer satisfaction with the products and services offered by the organization. • Anticipates customer needs and seeks ways to improve service delivery. 	<ul style="list-style-type: none"> Exceptional Highly Successful Successful Below Expectations Needs Improvement 	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>	<input style="width: 50px; text-align: center;" type="text" value="5.0"/>

Leadership & Safety Competency Section

Competency	Ratings Scale	Comments:	Score
<p>Managing Performance</p> <ul style="list-style-type: none"> Aligns the right work with the right people; delegates tasks according to people's strengths and interests. Provides staff with coaching, training, and growth opportunities. Works to create a strong team, treating all staff fairly and consistently. Provides staff with ongoing, constructive feedback on their performance. Sets expectations for staff and holds them accountable. 	<ul style="list-style-type: none"> Exceptional Highly Successful Successful Below Expectations Needs Improvement Not Applicable 	<p>*</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> 	<div style="border: 1px solid gray; padding: 2px; width: 40px; text-align: center;">5.0</div>

Overall Section Scores & Performance Rating

Once the manager has rated the employee in all applicable sections, an overall performance rating is calculated based on the associated scores of the ratings provided by the manager for each section. Using the scores assigned to each rating, Halogen takes the average of the individual ratings to produce the overall performance score and rating. Halogen will automatically assign the overall performance rating based on where the overall score falls using the rating scale below. Managers cannot edit the overall performance rating and score. The ratings, and their associated scores, are as follows:

- *Exceptional*
 - Associated score = 4.5 – 5
- *Highly Successful*
 - Associated score = 3.5 – 4.4
- *Successful*
 - Associated score = 2.5 – 3.4
- *Below Expectations*
 - Associated score = 1.5 – 2.4
- *Needs Improvement*
 - Associated score = 0 – 1.4

Overall Performance Rating & Score

Overall Performance Rating

Score: 4.8 / 5.0

Rating: Exceptional

In the above example, the employee's overall score came out to 4.8; based on the rating scale above, a 4.8 equals a rating of Exceptional. The employee's overall score was automatically calculated by Halogen and represents the average of all their individual ratings and scores given by the manager. The manager cannot manually edit the score or rating.

Using the Halogen Software

Task Section

What is a task?

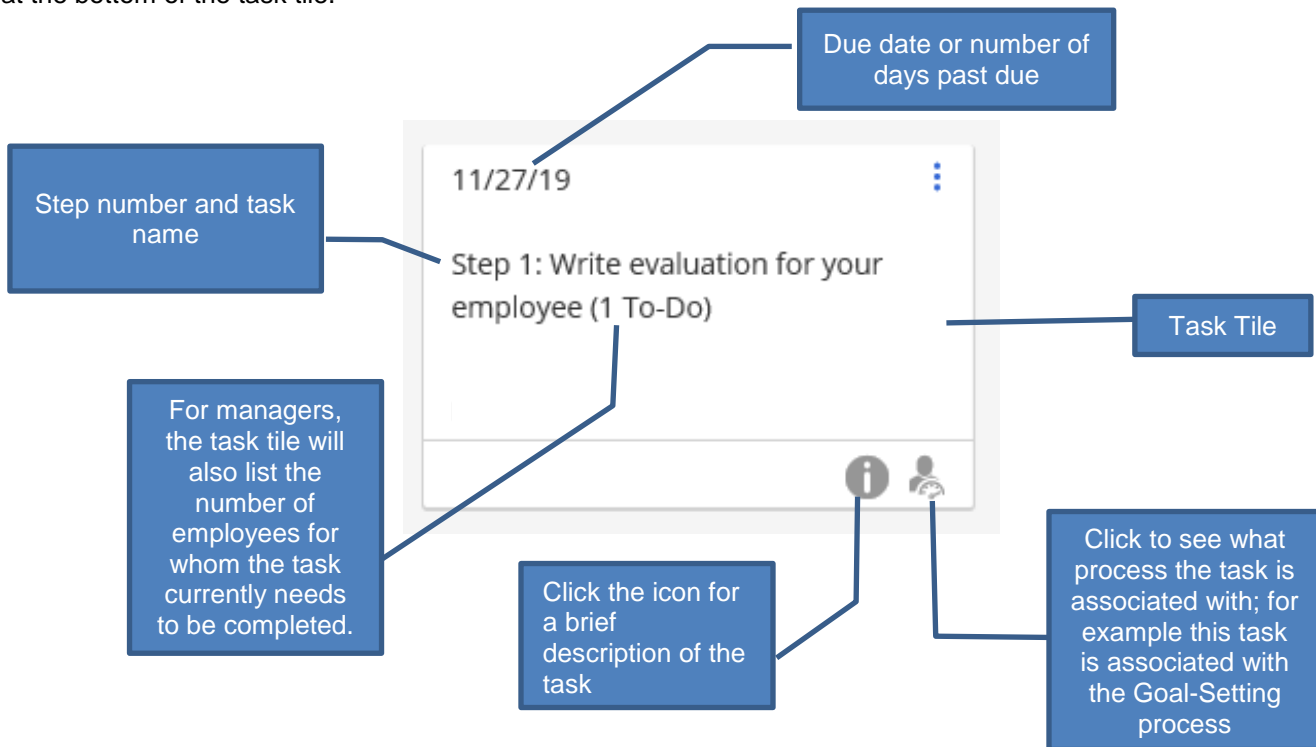
In Halogen, a task represents a step in a process that the employee or manager needs to complete, such as writing the evaluation. The employee and manager will have a separate task set in Halogen for each step in the process that they are responsible for.

For example, in Part 1: Review of Competencies / Setting Optional Expectations, there are 2 steps:

- 1) Manager reviews competencies and sets optional expectations
- 2) Employee confirms competencies and expectations

The manager is responsible for one step in the process, so they will have one task assigned to them: Manager reviews competencies and sets optional expectations (Step 1). The employee is responsible for one step in the process, so they will have one task assigned to them: Employee confirms competencies and expectations (Step 2).

Each task will appear in Halogen as a **task tile** in the Task section, located at the top of the homepage. The name of the task will be displayed on the task tile along with additional information such as due date, the process the task is associated with, and information on what the task is. Tasks that cannot be completed yet will display **Not Ready** at the bottom of the task tile.



Helpful information regarding tasks

All Tasks

To see a list of all your tasks, click the **All Tasks** link located at the top of the Task section. Halogen will redirect you to a list of your tasks, use the filters, located on the left side of the screen, to filter the tasks by Task status (i.e., overdue, due soon, in progress, etc.) or by the process the tasks are associated. To show only the tasks that are ready to be completed, click the Overdue, Due Soon, and In Progress boxes under the Task status filters. This is a helpful way to see what tasks can be completed at the moment. Tasks can also be filtered on the homepage.

You can also filter your tasks directly from the homepage. Click the settings icon (the gear icon, depicted in the screen shot here) to toggle between all tasks and only those that are ready to be completed.

Multiple Direct Reports

For managers with multiple direct reports, Halogen will **not** show a separate task tile for each employee. Instead, Halogen shows one task for all the employees for whom that task needs to be completed.

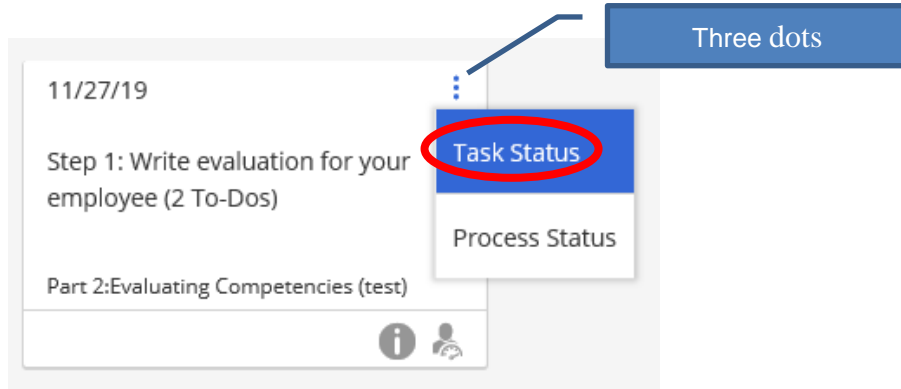
Click on the task tile, a list of employee names for whom you need to complete the task will be displayed. Click the **Edit appraisal** link next to an employee's name to complete the task for that employee. For example, in the below screenshot, the manager needs to complete the task for two employees: Madeline and Melinda; to complete the task for Madeline, the manager would click on the **Edit appraisal** link next to Madeline's name.

Employee	↑ Due date	
Madeline halogenSecondlevel	12/21/21	Edit appraisal
Melinda halogenHRRep	12/21/21	Edit appraisal

Task Status: Manager View

Managers, second level managers and appointing authorities can click **Task Status** to see an overall picture of the process and where each employee is in the process.

Click the icon with the three dots in the upper right corner of a task tile and select **Task Status**. Halogen will display a 'timeline' of the process that the task is associated with, displaying each step and a list of employees for whom that step needs to be completed. This is a helpful way to see what steps are ready to be completed for which employees, and also what steps have already been completed. Managers can also click the **View status** link next to an employee's name to find out what step in the process that employee is on and who is responsible for that step.



Steps in the process are displayed across the top of the timeline.

The screenshot shows a timeline for 'Part 2:Evaluating Competencies (test)' with five steps: 'Step 1: Write evaluation for your employee', 'Second-level manager reviews and approves evaluation', 'Appointing authority or designee reviews and approves ev...', 'Step 4: Meet with employee to deliver evaluation', and 'Employee sign-off and comments'. Below the timeline is a table of appraisal tasks.

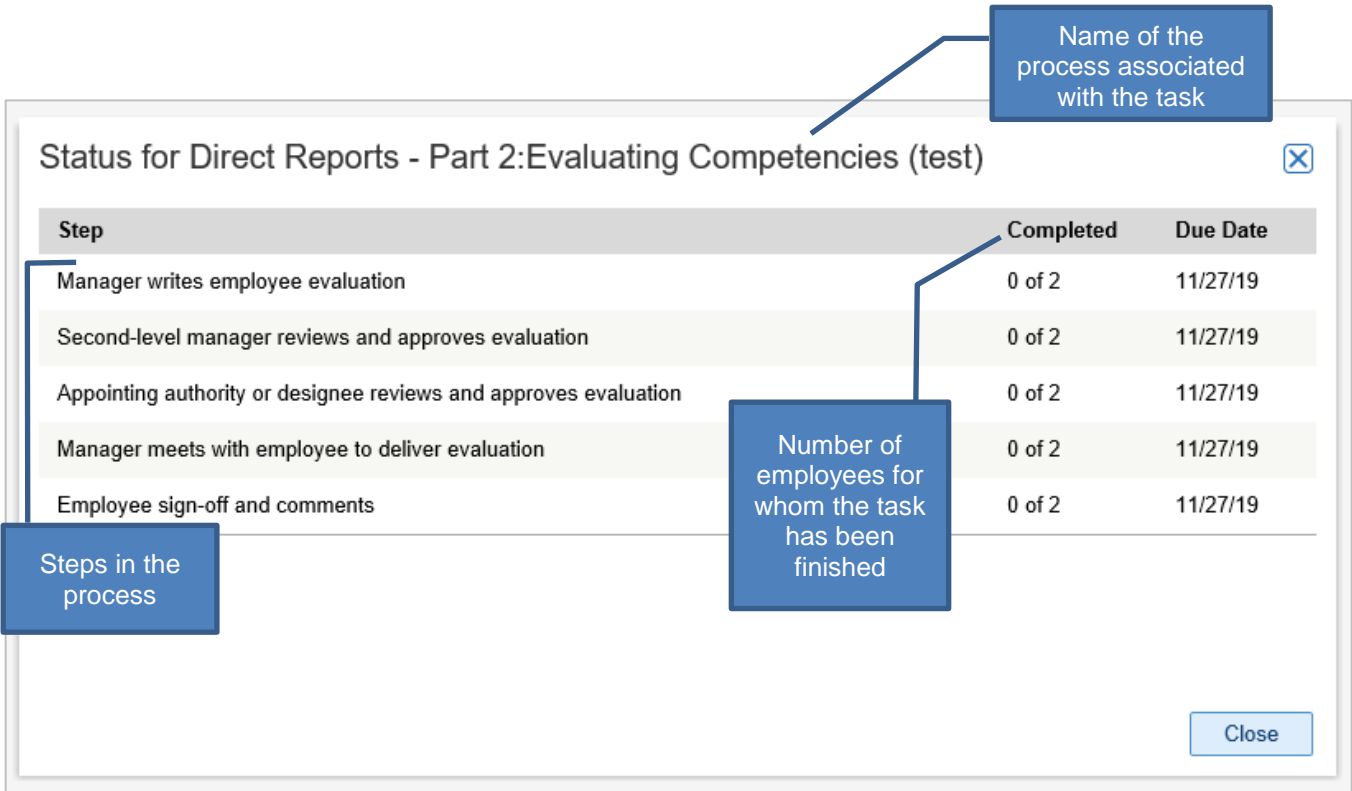
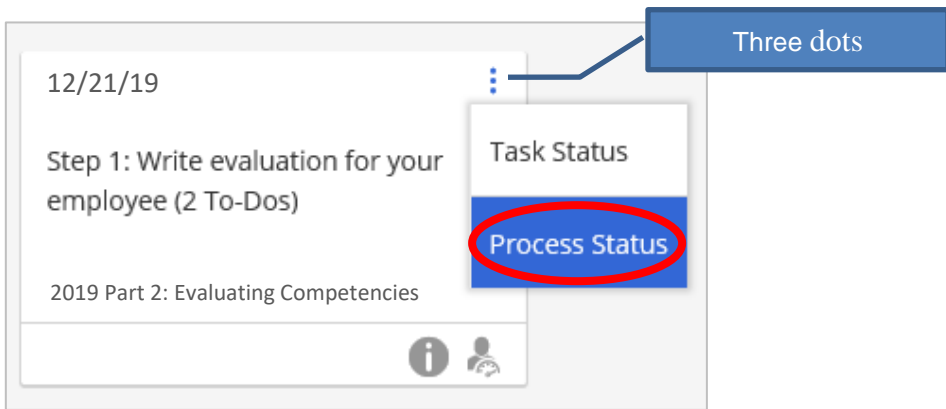
First Name	Last Name	Step 1: Write evaluation for your employee	Appraisal Status	Modified Date	Due Date	Completed Date
Kara	halogenEmployee	Edit Appraisal	View Status		11/27/19	
Kevin	halogenEmployee	Edit Appraisal	View Status		11/27/19	

Legend: ● Overdue ● My To-Do ● Their To-Do ● Sent for Review ● Not Ready ● Completed

Click **View status** to see what step in the process the employee is currently on and who is responsible for that step; this is a helpful way to see who the evaluation form is currently with.

Process Status: Manager View

In addition to **Task status**, managers can also click the icon with the three dots on task tiles and select **Process Status** to see a list of the steps in the process and the number of direct reports for whom they've finished that particular task.



Goal Section

Employees and managers can set and update goals in the Goals section. Additionally, if the manager entered any expectations in the Optional Expectations Box during the Part 1: Review of Competencies Process, the optional expectations will appear as a goal in the Goals section. For each goal, Halogen will display the name, the percentage completed, and a past due status, if applicable. Employees can also view a list of all their goals by clicking the **All Goals** link located at the bottom of the Goal section.

The screenshot shows a 'Goals' section with a header 'Goals +' and a grid of four goal cards. Each card displays '0%' in a circle, the goal name (Goal 1, Goal 2, Goal 3), and '1 month overdue' in red text. A blue callout box at the top explains that employees can add goals via a plus sign but are only evaluated on Core Competencies. A callout on the right notes that users can update the percentage by clicking the goal. A callout on the left explains that overdue status is shown in red. A callout points to the goal name as the 'Name of the goal'. A callout at the bottom points to the 'All Goals' link, stating to click it to see a list of all goals.

All Goals

Employees can click the **All Goals** link located at the bottom of the Goals section to access a complete list of their goals. From here, employees can choose to create a new goal by clicking the **Create a new goal** box or to update an existing goal. To update an existing goal, simply click on the desired goal.

The screenshot displays the 'All Goals' interface. On the left, a 'Filters' sidebar allows users to filter goals by status (Open/Closed), due date (All, Due soon, Overdue, No due date set), and created date (Any time, Last 28 days, Last 3 months, Last 6 months). A 'Create a new goal' button is prominently displayed. The main area shows a list of goals, each with a progress indicator (e.g., 85%, 5%, 0%, 0%) and a due date. A callout bubble explains that clicking on a goal leads to its details. On the right, a dropdown menu for sorting goals is shown, with options for Due date, Percent complete, Created date, Modified date, Start date, and Completed date. A callout bubble explains that users can sort goals by these criteria.

Employees can also choose which goals they want to view by using the **Filters** function.

Click on a goal to view additional details or to update it.

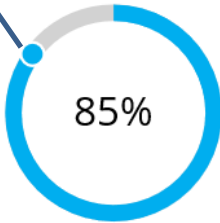
Employees can choose to sort the goals listed by due date, percent complete, created date, modified date, start date, or completed date.

Click on **Create a new goal** or the plus sign to enter a new goal.

Editing/Updating Goals

Managers and employees can update expectations and performance goals in Halogen throughout the performance period. To update a goal, click on the desired goal. From here, employees can choose to change the percent completed, to update the goal's status, to set a flag, or to add comments regarding their progress.

To change the percent completed, click and drag the blue dot to the desired percentage.



Title
Using Goals in Halogen

Due date
12/31/19

Description
While goals are no longer part of PEP, they are still a helpful tool for managing performance. Managers and employees can set and track goals using the Goals section in Halogen. During the evaluation, managers can use these goals to support how an employee did or did not fulfill the Core Competencies.

Start date
11/1/19

Completed date

- On Track
- ▲ At Risk
- ! Not on Track
- ⊘ No Flag Set

- Status
In Progress
- Select
 - Cancelled
 - Completed
 - In Progress
 - Not Started
 - On Hold

Description
While goals are no longer part of PEP, they are still a helpful tool for managing performance. Managers and employees can set and track goals using the Goals section in Halogen. During the evaluation, managers can use these goals to support how an employee did or did not fulfill the Core Competencies.

Start date
11/1/19

Completed date

Additional details

Created date: 11/15/19 Last modified: 11/15/19

Send me a reminder 7 day(s) before the due date

Then every 7 day(s)

Comments

Add new comment

Comments

Add new comment

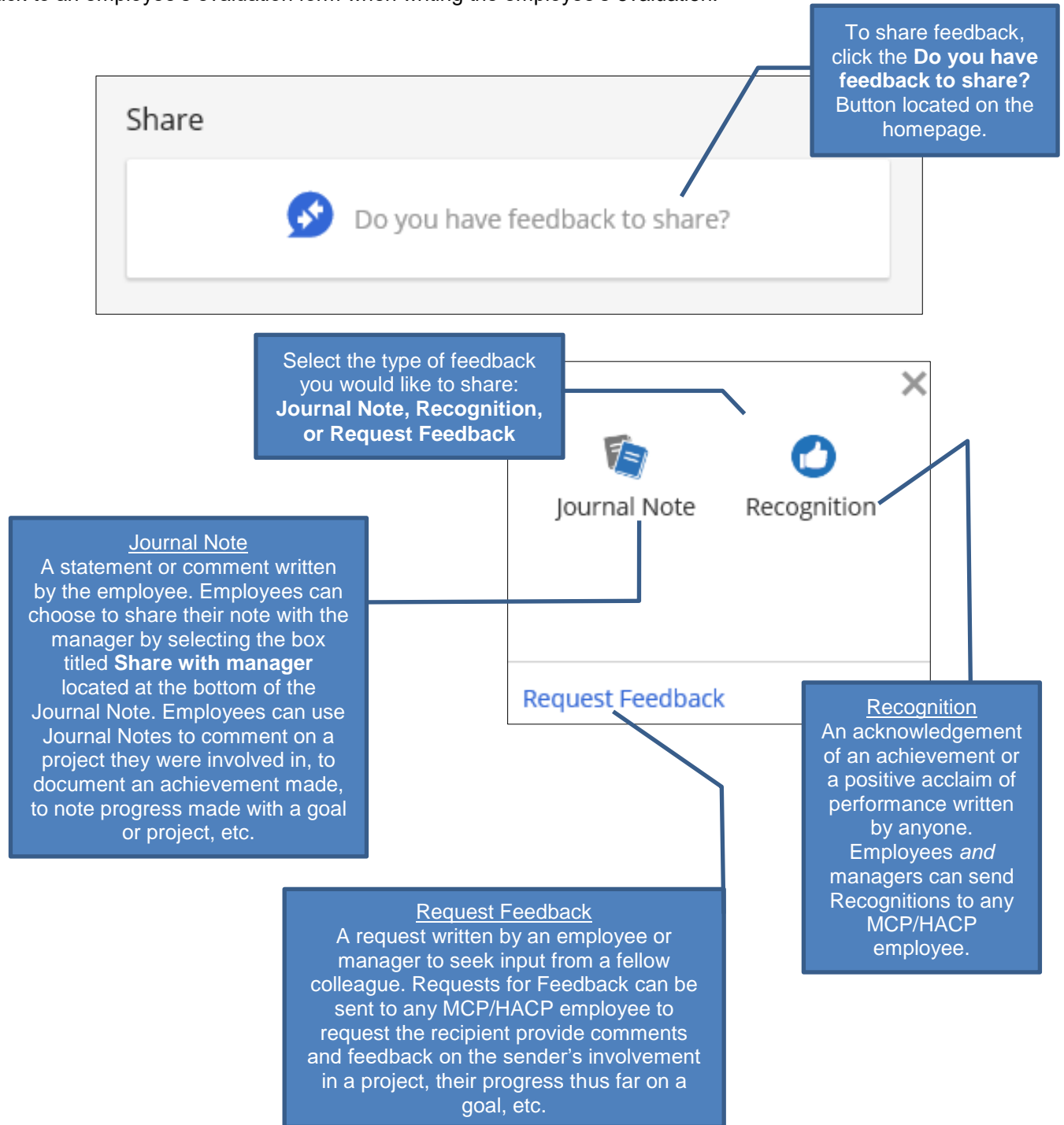
Add comments to document progress you've made toward completing the goal.

Save Cancel

Once you've finished entering your comment, click **Save**.

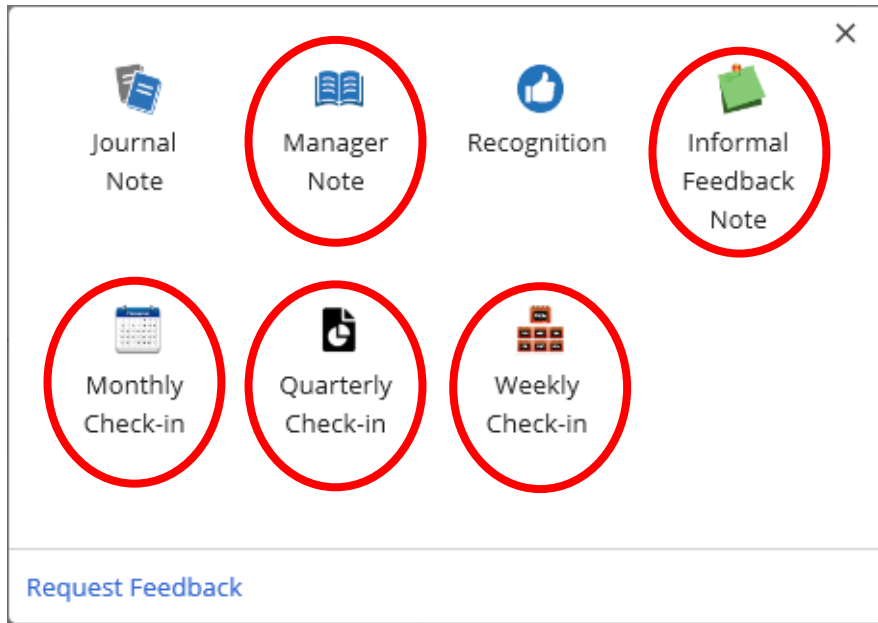
Share Section

Employees and managers have the ability to share feedback in Halogen with other MCP/HACP employees. Employees can choose to send feedback for a variety of reasons, such as to recognize another employee for their accomplishments or assistance, to document their own accomplishments, to request feedback from a manager, or to simply document progress they've made on an ongoing goal or project. Managers are able to view and attach feedback to an employee's evaluation form when writing the employee's evaluation.



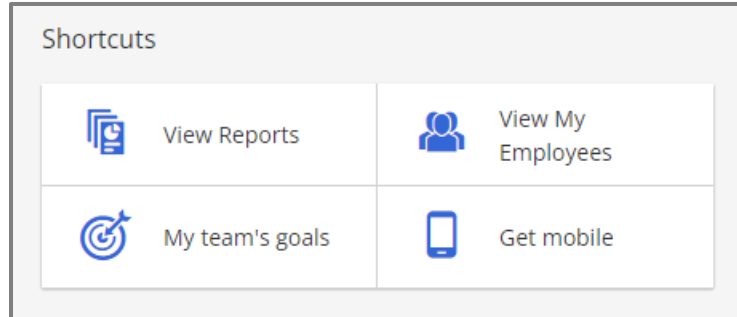
Manager View

Managers have additional feedback types that can be selected in the **Share** section. In addition to Journal Note, Recognition and Request Feedback, managers have the option select a **Manager Note**, **Informal Feedback Note**, **Weekly Check-In**, **Monthly Check-In**, or **Quarterly Check-in**. These feedback types are only accessible to managers with MCP/HACP direct reports; employees, or managers who do not have MCP/HACP direct reports, will not see these types when in the Share section. These feedback types enable managers to easily document observations, check-ins, and performance discussions in Halogen. Managers can choose which feedback types to utilize throughout the year.



Shortcuts Section

Managers and HR Officers will have an additional section displayed on the homepage, the Shortcuts section. This section includes links to several subsections, such as View Reports, View My Employees, and My team's goals. The Shortcuts section is not viewable to employees or managers who do not have MCP/HACP direct reports.



View My Employees

Managers and HR Officers can click on View My Employees to see a list of their direct and indirect reports. HR Officers will see all the employees they represent, in addition to any direct reports. The list displays the employee's name, job title, and relationship to the manager. In the below example, according to the Relationship column, the manager has one direct report, James, and two indirect reports, Jessica and Joe. A *direct report* is an employee who is directly supervised by the manager themselves, whereas *indirect reports* are supervised by another employee who, in turn, reports to the manager.

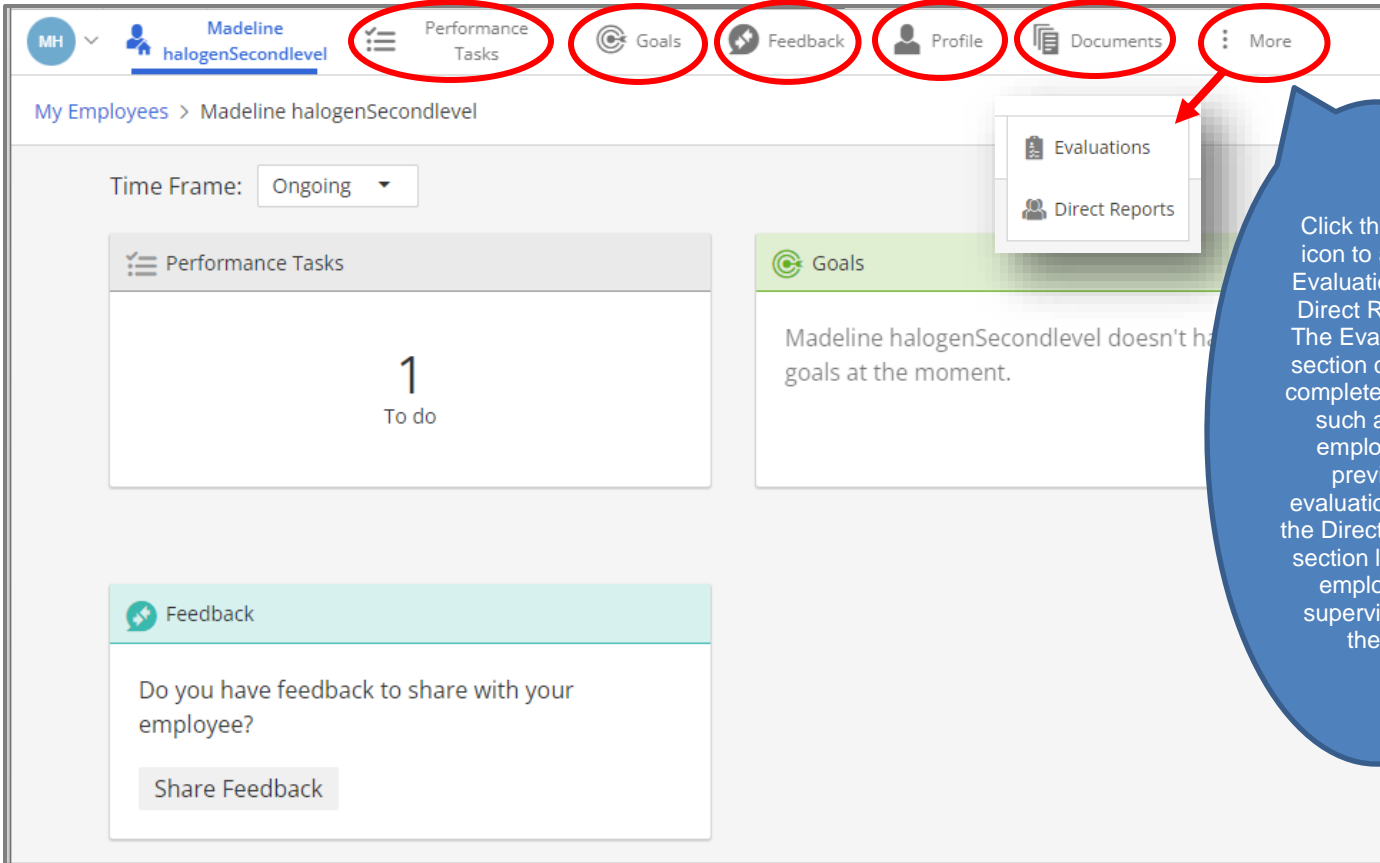
Clicking on an employee will redirect you to the *manager dashboard* for the selected employee; the dashboard contains the employee's profile, goals, feedback, evaluations, and documents.

The screenshot shows the 'View My Employees' interface. At the top left, a button labeled 'View My Employees' is circled in red. Below it is a search bar 'Search for an employee by name' and a 'Filters' button. The main area is a table with three columns: 'Employee', 'Job Title', and 'Relationship', each circled in red. The table contains three rows of data. A blue callout bubble points to the 'View My Employees' button, stating: 'Managers can navigate directly to the employee's goals, feedback, profile, etc. by clicking the 3 dots.' Another blue callout bubble points to the first row of the table, stating: 'Each bar or employee name is a link. Click on the desired name, and Halogen will redirect you to the manager dashboard for the selected employee.' A third blue callout bubble points to the three-dot menu icon on the right side of the table, which is also circled in red. This menu is open, showing options: Performance Tasks, Goals, Feedback, Profile, Documents, Evaluations, Talent View, and Manager Dashboard.

Employee	Job Title	Relationship
JH James halogenManager	Support Manager	Direct report
JH Jessica halogenEmployee	Support Analyst	Indirect report
JH Joe halogenEmployee	Support Analyst	Indirect report

Manager Dashboard

Halogen displays every employee's information in a centralized location, called the manager dashboard. The dashboard is designed to resemble the homepage, with the various sections listed across the top: Tasks, Goals, Feedback, Profile, Documents, and More. Click on the desired section to view additional information. For example, to view a complete list of the employee's goals, click on *Goals*. Managers can also see any tasks that their direct reports may have by clicking on Performance Tasks.

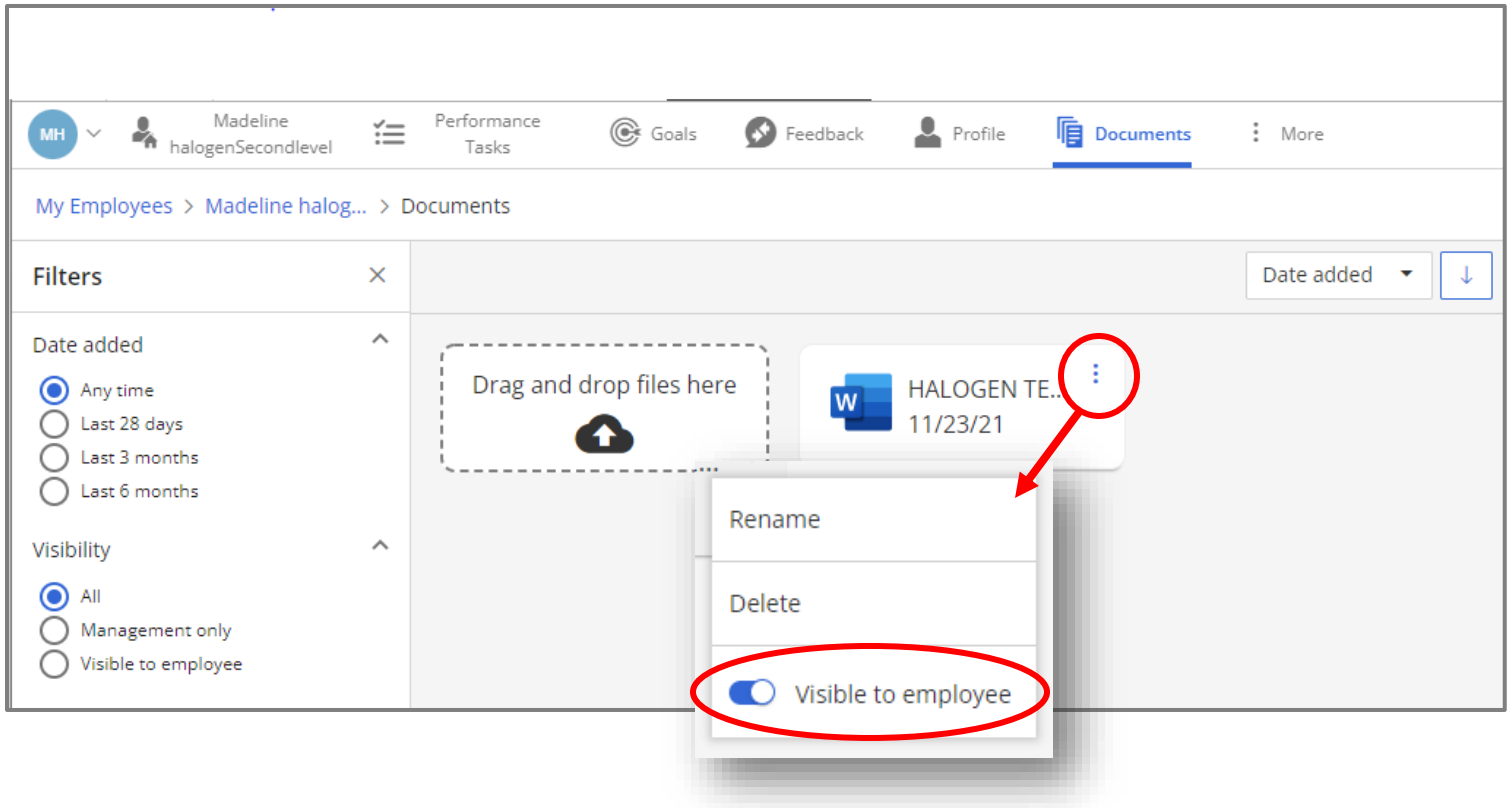


Any feedback associated with the employee is stored by Halogen in a centralized location and can be accessed by clicking on the *Feedback* icon, located at the top of the manager dashboard. Feedback associated with the employee is categorized as either *Received* or *Sent*. Recognitions received by the employee, journal notes entered by the employee, or manager feedback about the employee, such as a manager note, are categorized under Received, while any feedback sent by the employee is placed under Sent. Managers can see the author, or who created the feedback, the message, the feedback type, and the date the feedback was sent or received.



The Documents section of the Manager Dashboard allows managers to upload documents pertaining to their employee, such as Word documents with notes on probationary performance. Managers can also copy and paste emails into Word docs, to upload into Halogen. When uploading a document, managers can opt to make the document visible to the employee. This setting can be changed at any point in time by clicking on the three dots, located in the top-right corner of the document (circled in red, in the below screenshot).

During the evaluation process at the end of the year, managers can attach documents directly to the evaluation.



View Reports

Managers and HR Officers can run a variety of reports to obtain important information regarding their direct reports, such as the amount of feedback employees have sent or received or the number of tasks that are overdue, completed, or not ready yet. To view the available reports, click View Reports.

Shortcuts

- View Reports
- View My Employees

Search Title or Description [Search] [Show All] Advanced Search

Reports

Page 1 of 1 | Displaying 1 - 6 of 6

Title	Actions	Category	Author	Last Run	Notification Schedule
Competency Rating Provides individual competency appraisal scores for your employees.	[Play] [Eye] [Star]	Evaluations		10/16/19	
Feedback Report Provides details on all feedback and recognition sent and received through ...	[Play] [Pencil] [Eye] [Star]	Evaluations			
Goal Report Provides insight into the status of individual goals.	[Play] [Pencil] [Eye] [Star]	Performance			
Score Report Provides details related to the score for employees within one or multiple ...	[Play] [Pencil] [Eye] [Star]	Evaluations			
Status Report Provides details related to the progress of employees and steps within one ...	[Play] [Pencil] [Eye] [Star]	Evaluations			

Click the blue play icon to generate a report.

Click the pencil icon to edit a report.

Click the star icon to mark a report as a favorite.

Halogen provides a variety of reports to managers and HR Officers; however, because the City does not utilize certain functions in Halogen, some reports are not relevant to City of Columbus employees. Managers can choose to hide irrelevant reports by clicking the eye icon.

Reports > Status Report

Filters | Related Reports

Show: [Dropdown]
Group by: [Dropdown]
Add Filters

Employee Scope: Direct Reports
Process Status: Open
Status: Active

Status Report

33% Complete
3 Total Evaluations

Processes: (2)

Tasks: 20% Overdue, 0% Approaching Due, 0% In Progress

No. of Tasks

Task Status	No. of Tasks
Overdue	2
Not Ready	1
Completed	7

Click and drag to zoom

Page 1 of 1 | By Task Status | Displaying 1 - 10 of 10

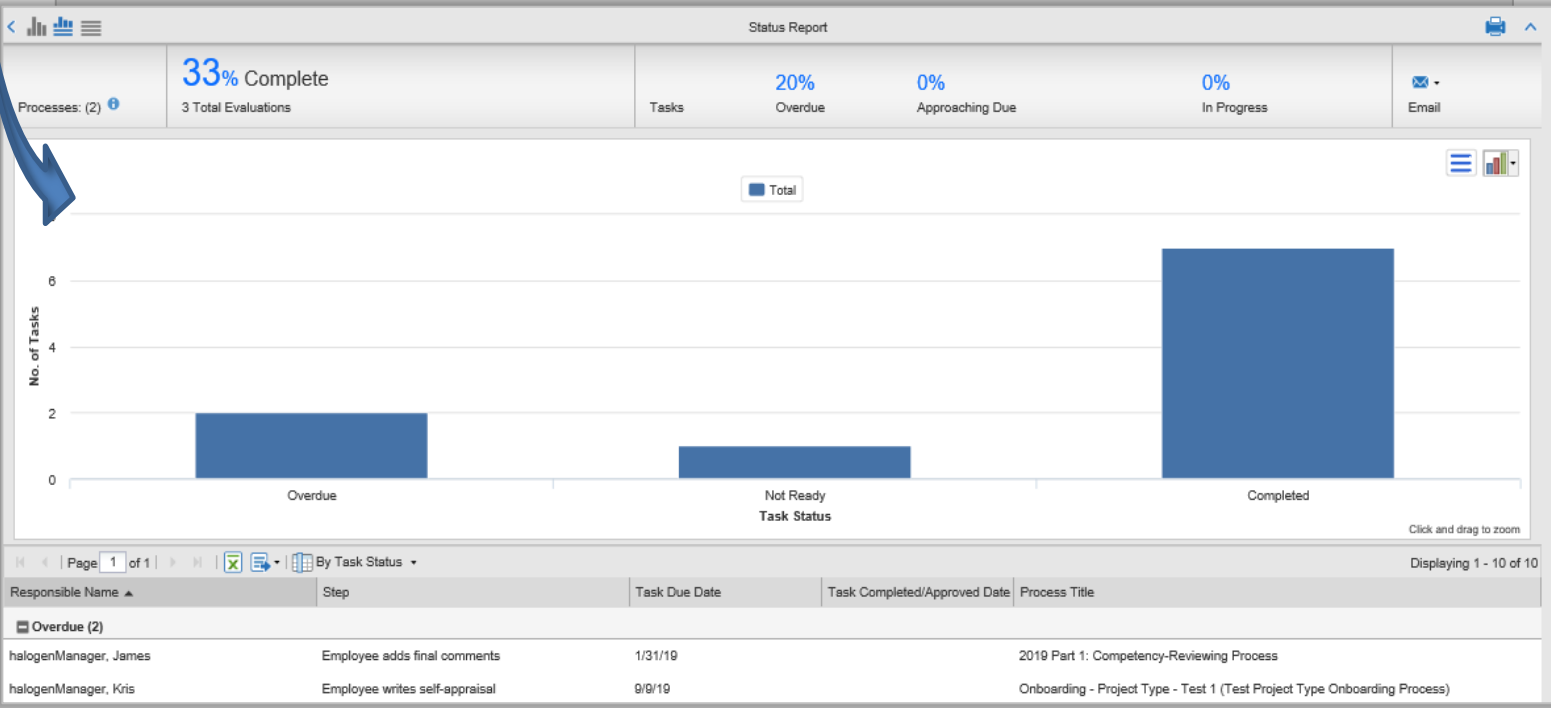
Editing Reports

Managers also have the option to edit the reports provided. For each report, managers can customize the information displayed by utilizing the different filters.

To edit a report, click the pencil icon. Once you've selected the desired filters, **click the blue play icon to generate the report.**

The **Show:** filter controls what information will be generated in the report. For example, when using the Status Report, managers can choose the *overall status* option, which shows the total number of tasks that are completed, overdue, or not ready for all open processes; or, they can select the *status by step* option to see how many tasks are completed, overdue, or not ready for each step in the processes.

Managers can also add various types of filters based on the report selected.

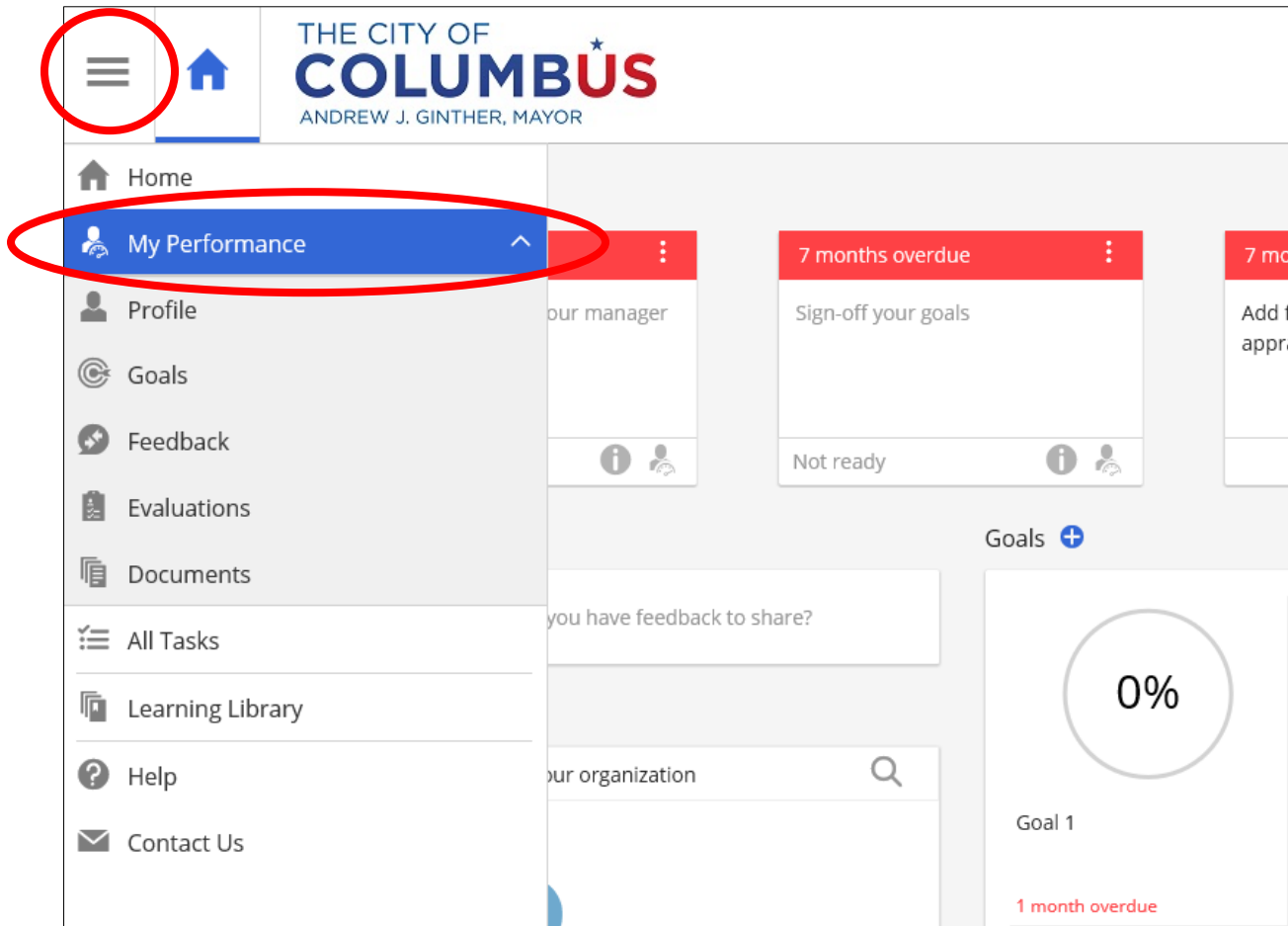


Main Menu Options

The Main Menu bar allows employees and managers to view important areas, such as My Performance and All Tasks.

My Performance

The **My Performance** option under the main menu bar allows employees to access several important areas: Profile, Goals, Feedback, and Evaluations. Click the icon with the three horizontal lines in the upper-left corner of the homepage to access the main menu bar, this will display a drop-down menu with several options, including My Performance. Click on My Performance to view a menu of the important areas listed above, Profile, Goals, Feedback, and Evaluations.



Profile

Click on Profile to view and edit your profile. Employees can edit their personal information, such as education, skills, certifications and licenses, etc. and add a photo of themselves here, if desired. The name of the employee's direct manager, their division and their department name can also be found here.

Goals

Click on Goals to view a list of your goals. The employee's goals and, if applicable, the expectations set by the manager during the Part 1 Process can be found here. Employees can also update the goals and add personal goals here, if desired. Please note, employees are only evaluated on the Core Competencies during Part 2: Evaluating Competencies.

Feedback

Click on Feedback to view a list of feedback sent and received. A list of feedback sent by the employee and received by the employee is stored here. Employees can also send Journal Notes and Recognitions to themselves or other employees from here.

Evaluations

Click on Evaluations to view past completed forms. Employees can find completed forms here from Part 1: Review of Competencies and Part 2: Evaluating Competencies. Forms from past processes, such as the 2017-2018 Goal-Setting & Evaluation processes and the Probationary Processes, can also be found here. However, forms will not appear in this section unless all steps in the associated process are completed.

Documents

Click on Documents to view any documents. Only managers can upload documents for employees. If a manager has not uploaded a document, then nothing will appear here.

All Tasks

The **All Tasks** option under the main menu bar allows employees to access a list of their tasks. The list will include completed and incomplete tasks for the current processes. Employees can also access their tasks directly from the homepage in the Tasks section, located at the top of the homepage.

Learning Library

The Learning Library is a feature offered by Halogen that provides learning materials created by Saba for managers and employees. The materials offered through this feature often involve aspects of the Halogen software that are not utilized by the City. Due to this, employees and managers may find the materials more confusing than helpful. We recommend that employees and managers utilize the materials provided by the City of Columbus for Halogen-related questions and problems.

Notifications

What is a notification?

A notification is an email, sent by Halogen, to an employee or manager regarding a task in a process.

For example, the Part 2: Evaluating Competencies Process opens on December 1 of each year. The manager is responsible for completing the first step in this process, **Step 1: Manager writes employee evaluation**; as such, the manager will receive an email notification from Halogen on December 1 directing them to write their employee's evaluation in Halogen. Halogen will continue sending emails to the manager until the task is completed.

When does Halogen send notifications?

Halogen will send an email notification to a manager or employee once they have a task that is ready to be completed. Halogen will continue to send the person emails until the task is completed; as the due date approaches, these emails may be sent more frequently. Halogen will not email the person responsible for the next step in the process until the previous step is completed, even if the step is past due.

For example, in the Part 1: Review of Competencies / Setting Optional Expectations Process there are 2 steps:

- Step 1) Manager reviews competencies and sets optional expectations
- Step 2) Employee confirms competencies and expectations

The manager is responsible for the first step, **Step 1: Manager reviews competencies and sets optional expectations**. Once the process opens, Halogen will send the manager an email notification prompting them to review the competencies and set expectations for their employee. Once the manager completes their task in Halogen, the employee will then receive an email prompting them to complete the second step, **Step 2: Employee confirms competencies and expectations**. Halogen will not send the employee an email notification until the manager has finished the first step, even if the first step is past its due date. If the manager's step is completed *after* its due date, the email notifications subsequently received by the employee may also state past due.

What does an email notification from Halogen look like?

Dear {First Name},

You have at least one task that is past due in the **2022 Part 1: Review of Competencies/Setting Optional Expectations Process**.

{Task Details}

Please complete the task as soon as possible. You will continue to be notified until the task is completed.

Please use the Halogen links on the City intranet to go to your home page to review the task or tasks that need to be addressed.

Should you require assistance, please contact Dave Hamon at DNHamon@columbus.gov, phone 614-645-4314.

Thank you.

City of Columbus
Department of Human Resources, Compensation
Management

Halogen email notifications will be sent from halogen@noreply.com; emails from this address are not spam. Do not reply to the email, as your email will not be directed to anyone; any replies will not be received.

Terms & Definitions

Process: Halogen considers each part of the 2-Part Performance Excellence Program (PEP) a separate process in the system (Part 1: Review of Competencies and Part 2: Evaluating Competencies). Certain processes in Halogen can “communicate” with each other by pulling in information from a past process to a new process. This is one of the reasons why it is imperative that managers complete all steps in a process, even if the steps are past due.

For example, when a manager writes an employee’s evaluation, any optional expectations which were previously entered during the Part 1: Review of Competencies Process are automatically displayed in the Optional Expectations section of the evaluation form. Halogen “pulls” this information into the evaluation form from the Part 1 process; as such, if the Part 1 process is not completed, the information will not automatically pull into the evaluation form.

Rate/Rating: Provided by the manager in the Core Competencies and Leadership & Safety Competencies sections of the evaluation form. During the Part 2: Evaluating Competencies Process, managers will rate the employee on each individual competency according to the rating scales defined below. Once finished, Halogen will automatically calculate an overall rating for each section.

Rating scale definitions for the Core Competencies and Leadership & Safety Competencies:

- *Exceptional:* Performance is consistently superior and significantly exceeds competency expectations.
- *Highly Successful:* Performance consistently exceeds competency expectations.
- *Successful:* Performance consistently meets competency expectations.
- *Below Expectations:* Performance meets some, but not all competency expectations.
- *Needs Improvement:* Performance consistently fails to meet competency expectations.
- For Leadership & Safety Competencies, a *Not Applicable (N/A)* rating is listed in addition to the above ratings.
 - Associated score = No associated score; this rating is not factored in by Halogen when calculating the overall section score/rating or the overall performance score/rating.

Score/Scoring: Each rating is assigned a numerical value which constitutes that rating’s score. In essence, each core competency and leadership & safety competency will receive a rating *and* a score. The score associated with each rating is preset and cannot be altered by managers. The score associated with each rating is listed below:

- Exceptional = 5
- Highly Successful = 4
- Successful = 3
- Below Expectations = 2
- Needs Improvement = 1
- Not Applicable = Excluded from the employee’s score

Based on the associated scores of the individual ratings given by the manager for each competency, Halogen will calculate an overall rating and score for the section.

Steps: Each process is comprised of steps, and each step in a process has a designated person who is responsible for completing that particular step. The steps in a process must be completed in order; Halogen will not allow the person assigned to Step 3 to complete their step until Steps 1 & 2 have been completed by the responsible parties. Once all steps have been completed, the process is then complete.

For example, the Part 2: Evaluating Competencies Process is comprised of 5 steps:

- Step 1) Manager writes evaluation
- Step 2) Second-level manager approves evaluation
- Step 3) Appointing authority approves evaluation
- Step 4) Manager meets with employee to deliver evaluation
- Step 5) Employee sign-off and comments

The manager, second-level manager, appointing authority, and employee all play a part in this process. Each step is assigned to either the manager, second-level manager, appointing authority, or the employee; the steps must be completed by the responsible party and in the order listed above. For example, the manager cannot complete Step 4: Manager meets with employee to deliver the evaluation, until the appointing authority has completed Step 3: Appointing authority approves the evaluation.

Tasks: Each step in a process has an associated task in Halogen; the person responsible for the step will have a **task tile** for that step in their **Tasks section** on the Halogen homepage. The employee and manager, and any other parties involved in the process, will have a separate task set in Halogen for each step that they are responsible for in the process.

For example, the Part 1: Review of Competencies Process has 2 steps:

- Step 1) Manager reviews competencies and sets optional expectations
- Step 2) Employee confirms competencies and expectations

The manager is responsible for one step in the process, so they will also have one task assigned to them: Manager reviews competencies and sets optional expectations (Step 1). The employee is responsible for one step in the process, so they will have one task assigned to them: Employee confirms competencies and expectations (Step 2).

Task Tile: Each task will appear in Halogen as a **task tile** in the **Task section**, located at the top of the homepage. The name of the task will be displayed on the task tile along with additional information, such as the due date, the process the task is associated with, and information on what the task is. Tasks that cannot be completed yet will have **Not Ready** displayed at the bottom of the task tile. Tasks displaying **Not Ready** at the bottom cannot be completed, even if the task is past due; the task can only be completed once the person responsible for the previous step has completed their task.

Task status: Allows managers, second level managers, and appointing authorities to see an overall picture of the process and where they are in each step with each employee; this is not accessible to employees. When accessing *task status*, Halogen will show a 'timeline' of the process that the task is associated with, displaying each step in that process along with a list of employees for whom that step needs to be completed.

Process status: Allows managers and employees to view a list of the steps in the process that the task is associated with. This also:

- Allows employees to see what step they are currently on in the process and the person responsible for that step.
- Allows managers to see the number of direct reports for whom they've finished that particular task