Strategic Talent Management


eAppraisal
User Guide

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Issue 1

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Preface

Purpose

The Halogen eAppraisal module is part of Halogen’s Talent Management Suite of Web-based talent management software solutions. Halogen eAppraisal can be used to create and modify employee appraisals, assessments, generate reports, create and monitor goals and development plans, and much more.

The purpose of the Halogen eAppraisal User Guide is to familiarize users with the application and provide information on the various features and functionality used to manage and participate in an appraisal process.

Audience

The Halogen eAppraisal User Guide is intended for end users such as employees, managers and human resources representatives.

This User Guide assumes that you have a basic knowledge and understanding of Windows applications, and Web browsers. Great depth of knowledge is not required, but it would be helpful to understand basic Windows terminology, such as double-clicking, menu bars, links, and dialog boxes.

Graphics

The appearance of graphics found in this document may vary from your site, depending on your site’s customization of Halogen’s Suite of applications, its configuration, and the operating system used.

The operating system used to create this document was Windows XP. The default configuration of the Halogen Suite was applied.
Typographic Conventions

Typographic conventions make written material easier to understand by helping to identify the type of information being presented. This document uses the conventions listed in the following table.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fonts</strong></td>
<td>The main body of this guide uses the Times New Roman (serif) font for print, and Arial (sans serif) for online versions. The labelling of graphics in this guide uses the Arial (sans serif) font.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>The use of <em>Bold</em> text highlights items you can select in <em>Halogen’s</em> interface, including buttons, tabs and menu selections. It is also used in the identification of dialog boxes, windows, and specific application terms.</td>
</tr>
<tr>
<td><strong>Red Italic</strong></td>
<td>The use of <em>Red Italic</em> text indicates that there is a link to another section of the document that pertains to the text being read. When you click on the link, the related text is displayed. The online Help version uses “Blue” links.</td>
</tr>
<tr>
<td><strong>Italic</strong></td>
<td>The use of <em>Italic</em> text indicates a book title, product names, variables and highlights important terms and/or information.</td>
</tr>
</tbody>
</table>

Using Halogen’s Documentation

The *Halogen eAppraisal User Guide* contains information about the tools and commands of the application.

A printable version of the *User Guide* is available in PDF format on the *Halogen* product CD. If you view the Guide electronically, active links are present to allow for navigation through the document to assist you in finding desired information.

*Halogen’s Suite* of applications also includes complete documentation in an HTML-based Online Help version, which can be accessed within the application. To launch the Online Help, click the “Help” link located in the top right corner of most screens.
Chapter 1

Welcome to eAppraisal

Chapter Scope

This section introduces the Halogen eAppraisal application, a Web-based option in Halogen’s Talent Management Suite.

The section topics are as follows:

• “Halogen eAppraisal Overview” on page 2
• “What is an Appraisal Process?” on page 3
• “Access Rights and Privileges” on page 4
Halogen eAppraisal Overview

Halogen eAppraisal is an award winning Web-based system that simplifies and enhances the entire employee performance appraisal process. Its extensive authoring aids and point-and-click simplicity dramatically improve HR and line manager productivity, resulting in professional quality reviews in a fraction of the time.

• Automates every aspect of appraisal processes within your organization
• Provides the right forms to the right people at the right time
• Supports a variety of appraisals - scheduled, anniversary, interim, probationary
• Unlimited number of appraisal forms with extensive configuration options
• Complex scoring options and weighting measures available
• Real-time status with a Dashboard graphic view

If you are using the Halogen eAppraisal Healthcare version of the Talent Management Suite, the features and functionality remains the same. However to create medical-based appraisals the addition of a medical dictionary, health care-specific forms libraries and authoring aids have been included. Specific capabilities for meeting regulatory and accreditation criteria such as those of JCAHO, OSHA, ACHA, and others can also be incorporated into your automated employee appraisal solution.

eAppraisal Features

Halogen eAppraisal was selected by your organization to possibly improve an existing paper-based employee performance appraisal system. It can streamline the process for all involved and provide managers at all levels with greater visibility into the day-to-day execution of corporate strategies and ensure employees are provided with consistent and professional evaluations. The following are some of the Halogen eAppraisal features:

• On-Target Goal Management
• Competency Management
• Career and Development Planning
• Year-Round Journal Notes
• Line Manager Tools and Authoring Aids
• Flexible Forms
• Configurable Automated Workflow
• Configurable Automated E-mail Reminders
• Real-Time Reporting
• Quick-Take Dashboard Reporting
• Lominger Leadership Architect Competency Library (optional feature)
• Web Services - Works with your HRIS System

Also available is the optional Multirater module, an assessment tool that can be used with Halogen eAppraisal as part of your employee performance appraisal process. Multirater makes it convenient to gather and analyze feedback from peers, direct reports, other supervisors or customers on particular competencies—or the overall performance of an employee.

**What is an Appraisal Process?**

An appraisal process is used to capture, measure, and manage an employee’s progress and/or performance on the job during a predetermined time frame. Your company may refer to an appraisal process as reviews, or evaluations.

With the Halogen eAppraisal application you can partake in one or more of the following types of appraisal processes:

• Scheduled - can be initiated at any given time, and is not bound by anniversary or quarterly time frames

• Anniversary - usually completed once per year, dates are predefined and can vary for each employee and/or departments

• Interim - can be initiated on a quarterly basis, or reflect probation time frames

While every company is different, the following example will be used to illustrate a commonly used Annual Performance Appraisal Process workflow.

**Table 1-1  A Typical Annual Performance Appraisal Process Workflow**

<table>
<thead>
<tr>
<th>Participant</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Rep</td>
<td>Prepares the Appraisal Form, and sets up employee notification by e-mail with Username and Password information.</td>
</tr>
<tr>
<td>Employee</td>
<td>Logs into eAppraisal and complete the Self-Appraisal Form online.</td>
</tr>
<tr>
<td>Manager</td>
<td>Reviewing Manager(s) completes the Appraisal Form.</td>
</tr>
<tr>
<td>HR Rep</td>
<td>Reviews and approves the Appraisal Form.</td>
</tr>
<tr>
<td>Manager</td>
<td>Meets with Employee and reviews the Appraisal Form.</td>
</tr>
<tr>
<td>Employee</td>
<td>Reviews and may add final comments then Signs off on the Appraisal.</td>
</tr>
<tr>
<td>Manager</td>
<td>Signs off on the Appraisal.</td>
</tr>
<tr>
<td>HR Rep</td>
<td>Signs off on the Appraisal.</td>
</tr>
</tbody>
</table>
Access Rights and Privileges

Employees of an organization are entered as participants of the appraisal process. They are then assigned roles which will enable them to access various elements of the application and designated information. Various access rights and privileges will be associated with the assigned roles.

While every company is different, the following illustrates different users and their roles with associated access rights and/or privileges within the *Halogen eAppraisal* application.

**Table 1-2  A Quick Glance at Access Rights and Privileges**

<table>
<thead>
<tr>
<th>Roles</th>
<th>Access Rights and Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>This user is usually any Employee that is being evaluated.</td>
</tr>
<tr>
<td></td>
<td>They can access their Personal Pages, and manage their Journal Notes.</td>
</tr>
<tr>
<td></td>
<td>They are responsible for completing their Self-Appraisals.</td>
</tr>
<tr>
<td>Manager</td>
<td>This user is responsible for managing their direct reports</td>
</tr>
<tr>
<td></td>
<td>They have access to Employee Appraisals and reports, and may have</td>
</tr>
<tr>
<td></td>
<td>access to Journal Notes when applicable.</td>
</tr>
<tr>
<td></td>
<td>They review Employee Self-Appraisals, write up performance Appraisals,</td>
</tr>
<tr>
<td></td>
<td>review Appraisals with the Employee and will sign-off on the Appraisal.</td>
</tr>
<tr>
<td>HR Representative</td>
<td>This user can be assigned to various stages of an Appraisal Process.</td>
</tr>
<tr>
<td></td>
<td>They can be granted access to Employee Appraisals and Manager’s list</td>
</tr>
<tr>
<td></td>
<td>of direct reports.</td>
</tr>
<tr>
<td></td>
<td>They may or may not be required to assign Appraisal Forms, select</td>
</tr>
<tr>
<td></td>
<td>Manager’s list of direct reports and provide sign-off approval on</td>
</tr>
<tr>
<td></td>
<td>Appraisals.</td>
</tr>
</tbody>
</table>
Chapter 2
Employee Tasks

Chapter Scope

This section provides a detailed explanation of the various tasks that an employee may be required to perform in the course of a typical appraisal process.

The section topics are as follows:

- “Updating Your Employee Profile as Part of an Appraisal Process” on page 6
- “Writing Your Self-Appraisal” on page 7
- “Adding Final Comments to Your Appraisal” on page 7
- “Signing Off on Your Appraisal” on page 8
- “Sending Your Appraisal for Competency Rating Feedback” on page 9
- “Viewing the Status of Your Appraisal Process” on page 10
- “Selecting Your Multirater Evaluators” on page 10
**Updating Your Employee Profile as Part of an Appraisal Process**

The Employee Profile is a collection of employee data. Depending on how your company implements these profiles, profile data may include education information, internal and external work experience, and so forth.

If your organization uses photos for profiles, you may be able to add a photo of yourself, or add a different photo if you want to use a different photo.

If weights have been assigned to profile sections, a “Profile Completeness” graph appears at the top of the screen. Pause your mouse pointer over the information icon 🔄 to see what information you must add to complete your Employee Profile.

**Note:** You cannot update your basic employee information (your name, job title, and so forth) at the top of your profile. If you need some of this basic employee information updated, contact your administrator.

**To Update Your Employee Profile**

1. In the **My Tasks** area, click **Update your profile** under the appropriate process.

2. Do any of the following:

   • Click **Add (section name)** to add profile information, and then select values from the lists and/or enter text into the text boxes, and then click **OK**.
   • To edit an entry, click the edit icon 🖊, then select values from the lists and/or enter text into the text boxes as required, and then click **OK**.
   • To delete an entry, click the delete icon ✖️, and then click **OK**.

3. To add a photo to your profile, click **Add Photo**, or click **Change** to add a different photo, or click **Remove** to remove the photo, and then follow the instructions in the wizard.

4. (Optional) Do any of the following:

   • Click the up arrow icon 🌡 to hide profile sections.
   • Click the printer icon 📑 to print the profile.
   • Click the envelope icon 💌 to send an E-mail to Management (Manager, HR Representative, or Coach).

5. Do either of the following:

   • If you want to finish updating your profile later, click the close icon ✗
   • When you have finished updating your profile, click **Complete**.
Writing Your Self-Appraisal

Writing your self-appraisal is a key step in the appraisal process. Your HR Rep usually assigns an appropriate appraisal form based on your department and/or job title, and you will be notified by e-mail. Once you write your self-appraisal, it will be viewed by your manager and possibly a second level manager and/or a HR Rep.

You may want to begin by reviewing your journal notes if you have used this tool before, to track your activities and relevant events.

To Write Your Self-Appraisal

1. In the My Tasks area, click **Write your self-appraisal** under the appropriate process.
2. Complete the form as required.
3. (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   - If you want to check spelling on the form, click the Check Spelling icon . For more information, see “Checking Spelling on a Form” on page 57.
   - If you want to check for inappropriate language on the form, click the Check Language icon . For more information, see “Checking for Inappropriate Language on a Form” on page 58.
   - If you want to view other records (goals, development plans, past appraisals and so forth) in a split screen below the form, click the Split Screen icon , and then click the record you want to view.
   - If you want to add annotations for the reviewer of the form, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon . For more information, see “About Annotations” on page 54.
4. Do either of the following:
   - If you would like to return and complete the step later, click **Save**, and then click the close icon 
   - Click **Complete**.

Adding Final Comments to Your Appraisal

After your manager has completed your appraisal, you may be required to add final comments to it.
To Add Final Comments to Your Appraisal

1 In the **My Tasks** area, click **Add final comments to your appraisal** under the appropriate process.

2 From the **Form Navigator** column on the left side, click **Comments**.

3 Enter your comments in the **Employee** box.

4 (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   - If you want to check spelling on the form, click the Check Spelling icon. For more information, see “Checking Spelling on a Form” on page 57.
   - If you want to check for inappropriate language on the form, click the Check Language icon. For more information, see “Checking for Inappropriate Language on a Form” on page 58.
   - If you want to view other records (goals, development plans, past appraisals and so forth) in a split screen below the form, click the Split Screen icon, and then click the record you want to view.

5 Do either of the following:
   - If you would like to save your work and finish adding your comments later, click **Save**, and then click the close icon.
   - When you have finished adding your comments, click **Complete** and then click **OK** to confirm.

**Signing Off on Your Appraisal**

Depending on your process, you may be required to sign off on your appraisal.

To Sign off on Your Appraisal

1 In the **My Tasks** area, click **Sign off your appraisal** under the appropriate process.
Sending Your Appraisal for Competency Rating Feedback

Typically, your manager rates you on the competencies listed on your appraisal form. Depending on the appraisal process, you may also be required to send your appraisal to a 3rd party so they can rate your performance on these competencies.

To Send Your Appraisal for Competency Rating Feedback

1 In the My Tasks area, click Send your appraisal for competency rating under the appropriate process.

2 Click Send to Competency Rater.

3 In the Last Name and/or First Name box(es), type the first few letters of the employee’s last and/or first name(s), and then click Search.
   Tip: If you need to show more information about the available employees, in the Show Additional Information list, click either Department or Email Address.

4 In the Available Employee box, click the employee you want to provide the competency rating feedback, and then click Send.
   Tip: If required you can cancel the competency rating feedback request. From My Tasks on the Home page, click Options to display the filters and click Send for Review and Refresh List. Then click Send your appraisal for competency rating, and then click Cancel Competency Rating. Click the close icon.

5 (Optional) When the competency rating has been provided, you can review the feedback and send your appraisal for competency rating to another employee by repeating steps 1-5.

6 When all the competency rating feedback has been received, perform step 1 and then click Complete.
Chapter 2: Employee Tasks

**Viewing the Status of Your Appraisal Process**

If required, you can view the status of an appraisal at any time to view the following information:

- Process Title
- Step Names
- Step Statuses
- Due Dates
- Person Responsible

To View the Status of Your Appraisal Process

1. In the My Tasks area, click Status for the appropriate process.
2. Review the information, and then click Close.

**Selecting Your Multirater Evaluators**

If configured by the administrator and your manager, you may be required to select your own evaluators for a Multirater process. When you choose your evaluators, you must also define their relationship to you. For example, if you choose an evaluator that is your equal, or peer, select “Peer” as the relationship.

To Select your Multirater Evaluators

1. In the My Tasks area, click Select your Multirater evaluators under the appropriate process.
2. In the Last Name and/or First Name box(es), type the first few letters of the employee’s last and/or first name(s), and then click Search.
   
   Tip: If you need to show more information about the available employees, in the Show Additional Information list, click either Department or Email Address.
3. In the Available Employees box, click the employee you want to use as an evaluator.
4. From the Select a relationship list, click either Direct Report, Peer, Manager, or Self and then click Add.
5. Repeat Steps 2-4 for any other evaluators you want to select.
   
   Click OK, and then click OK again to proceed.
Chapter 3
Evaluator Tasks

Chapter Scope

This section provides a detailed explanation of the various tasks that an Evaluator may be required to perform in the course of a typical appraisal process.

The section topics are as follows:

- “Performing a Third Party Review” on page 12
- “Performing a Third Party Approval of an Appraisal” on page 12
- “Performing a Multirater Assessment” on page 13
- “Providing Competency Rating Feedback” on page 14
Chapter 3: Evaluator Tasks

Performing a Third Party Review

Depending on your process, you may be asked to provide a third party review of a performance appraisal. For example, you may be asked to provide feedback on employees that you have worked with during the year.

To Perform a Third Party Review

1. In the My Tasks area, click **Provide third party feedback** under the appropriate process.

2. Click **Edit Appraisal** for the appropriate employee.

3. To do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   - If you want to add annotations for the reviewer of the form, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon. For more information, see “About Annotations” on page 54.

4. Do one of the following:
   - If you want to save your work and finish the review later, click **Save**.
   - Once you have finished reviewing the form, click **Complete**.

Tip: If you have multiple employees in your list for which you must perform the same task, use the Next Employee or Previous Employee to move to the next or previous available employee in your list.

Performing a Third Party Approval of an Appraisal

If you are neither a manager nor an HR Rep, you can still be asked to approve an appraisal. For example, if you are a corporate trainer, you may be asked to approve an employee’s appraisal.

To Perform a Third Party Approval of an Appraisal

1. In the My Tasks area, click **Approve appraisals as third party approver** under the appropriate process.

2. Click **Review & Approve** for the appropriate employee.

3. Review the appraisal, taking care to read any previous annotations, as indicated by the Review Annotation icon (if applicable). You must read all of the annotations before you can approve the assessment.
Performing a Multirater Assessment

4 Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   • If you want to view your other employee records (goals, development plans, past talent assessments and so forth) in a split screen below the form, click the Split Screen icon , and then click the record you want to view.
   • If you want to add annotations for the reviewer of the form, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon . For more information, see “About Annotations” on page 54.

5 Once you are done reviewing the appraisal, do any of the following:
   • If you are satisfied with the appraisal, click Approve.
   • If you have made changes or added any new annotations, click Send Back to Author.
   • If you would like to return and approve the appraisal later, click Save.

   Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Performing a Multirater Assessment

If you have been requested to perform a Multirater assessment, a link for the assessment will appear on your Home page. You can perform the assessment, or you can decline to perform it. If you decline to perform the assessment, you must provide a reason for declining.

To Respond to a Multirater Questionnaire

1 In the My Tasks area, click Write Multirater assessments under the appropriate process.

2 Do one of the following:
   • To accept the invitation and perform the Multirater assessment, click Edit Multirater for the appropriate employee, and then go on to step 3.
   • To decline the invitation to perform the Multirater assessment, select the check box next to the employee’s name, then click Decline Assessment, then specify your reason for declining, and then click OK.

3 Complete the assessment.
Chapter 3: Evaluator Tasks

4 (Optional) Do any of the following:
   • If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to check spelling on the form, click the Check Spelling icon . For more information, see “Checking Spelling on a Form” on page 57.

5 Do either of the following:
   • If you want to save your work and finish the assessment later, click Save.
   • If you have finished the assessment, click Complete.
   Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Providing Competency Rating Feedback

Typically, a manager rates employees on the competencies listed on an appraisal form. Depending on how your appraisal processes are configured, you may also be required to rate a fellow employee’s performance on these competencies. If your administrator has configured this step, and another employee has requested a competency rating from you, you will see it in your task list.

To Provide Competency Rating Feedback

1 In the My Tasks area, click Provide competency rating under the appropriate process.

2 Click Edit Appraisal for the appropriate employee.

3 Complete the Competencies sections as required.
   Tip: If the form has comments fields available, you can add your comments for each competency.

4 (Optional) Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   • If you want to add annotations for the reviewer of the form, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon . For more information, see “About Annotations” on page 54.
   • If you want to check spelling on the form, click the Check Spelling icon . For more information, see “Checking Spelling on a Form” on page 57.
   • If you want to check for inappropriate language on the form, click the Check Language icon . For more information, see “Checking for Inappropriate Language on a Form” on page 58.
5 Do one of the following:

- If you want to save your work and finish the competency rating later, click **Save**.
- Once you have finished entering your competency rating feedback, click **Complete**, and then click **OK** to confirm.

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click **Next Employee** or **Previous Employee** to move to the next or previous available employee in your list.
This section provides a detailed explanation of the various tasks that a manager may be required to perform in the course of a typical appraisal process.

The section topics are as follows:

• “Selecting Your Direct Reports” on page 18
• “Assigning Appraisal Forms to Your Direct Reports” on page 18
• “Adding Optional Competencies to a Form” on page 19
• “Approving Your Direct Reports’ Self-Appraisals” on page 19
• “Writing an Appraisal for Your Direct Reports” on page 20
• “Assigning Your Direct Reports to Another Manager” on page 21
• “Adding Past or New Goals to Your Direct Reports” on page 22
• “Assigning a Third Party Reviewer” on page 23
• “Approving Appraisals Written by Direct Managers” on page 23
• “Meeting with Your Direct Reports to Review Appraisals” on page 24
• “Launching Halogen e360” on page 25
• “Adding Final Comments to Your Direct Reports’ Appraisals” on page 26
• “Signing Off on Appraisals” on page 26
• “Performing a Combined Sign-off with an Employee” on page 27
• “Working with Reports” on page 28
• “Multirater Tasks” on page 34
Selecting Your Direct Reports

If configured by the administrator, you may be required to select your direct reports in an appraisal process.

To Select Your Direct Reports

1. In the My Tasks area, click Select your direct reports under the appropriate process.
2. In the Search area, in the Last Name and/or First Name box(es), enter the direct reports first and/or last name, and then click Search.
3. In the Available Employees area, click the employee you want to select as a direct report, and then click Add.
   Tip: If you want to show more information about the employees, click either Department or Email Address from the Show additional information list.
4. Do either of the following:
   • If you would like to save your work and return to complete the step later, click Save.
   • If all direct reports have been assigned, click Complete.

Assigning Appraisal Forms to Your Direct Reports

You may be required to assign appraisal forms to your direct reports. You can change the form assignment for each of your direct reports as long as the form is not currently in use for the selected direct report.

To Assign an Appraisal Form to Your Direct Reports

1. In the My Tasks area, click Assign forms to direct reports under the appropriate process.
2. Select the check box next to the direct report(s) you want to assign a form to.
3. Click Assign Form.
4. Do any of the following:
   • In the Available Forms box, click the form you want to assign.
   • To select the default form, click Select Default Form.
5. (Optional) If you want to view the details of the form, click the form in the Available Forms box to display them in the Form Details area.
   Note: You may need to click the down arrow icon to display the Optional Competencies Selection and/or Form Details area(s).
6. Click Assign.
Adding Optional Competencies to a Form

If a form has optional competencies associated with it, you can add them to the form as long as the form is not currently in use.

To Add Optional Competencies to a Form

1. In the My Tasks area, click Assign forms to direct reports under the appropriate process.
2. Select the check box next to the direct report(s) you want to add optional competencies to.
3. Click Assign Form.
4. In the Available Forms list, select the form containing the optional competencies.
5. Click the down arrow icon to open the Optional Competencies Selection area.
6. In the Optional Competencies area, use the lists beside Section and Group to display all related competencies in the Available Optional Competencies list.
7. Click a competency, and then click Add. Descriptions of competencies display in the Description box.
8. Repeat the steps to continue adding competencies.
OR Remove an optional competency, click a competency from the Selected Optional Competencies list, and then click Remove.
9. When you are done, click Assign.

Approving Your Direct Reports’ Self-Appraisals

Depending on your process, your direct reports may be required to write a self-appraisal or you may be able to request a self-appraisal for some of your employees. Once your direct reports have written their self-appraisal, you can approve it or send the appraisal back to them.

To Approve Your Direct Reports’ Self-Appraisals

1. In the My Tasks area, click Approve self-appraisals for direct reports under the appropriate process.
   Note: If you are a 2nd, 3rd, or 4th level manager and you have been tasked with approving appraisals, the task title mentioned above changes to reflect your level.
2. Click Review & Approve for the appraisal you want to review.
3. Review the appraisal, taking care to read any previous annotations as indicated by the Review Annotation icon (if applicable). You must read all of the annotations before you can approve the appraisal.
Chapter 4: Manager Tasks

4 (Optional) Do any of the following:

- If you want to add your own annotations for the employee, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon. For more information, see “About Annotations” on page 54.

- If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.

- If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.

- If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.

- If you want to view other employee records in a split screen below the form, click the Split Screen icon, and then click the record you want to view.

5 Do one of the following:

- If you want to save your work and finish approving the appraisal later, click Save, and then click OK.

- If you do not want to approve the appraisal, or you have added annotations that must be read by the author, click Send Back to Author.

- If the appraisal does not require further revision, click Approve.

Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

**Writing an Appraisal for Your Direct Reports**

If assigned, you can be responsible for writing appraisals for your Direct Reports. This report can be used to compare notes against what the employee writes in their self-appraisal (if assigned) and will also be an important source of information when you meet with the employee.

**Note:** Depending on your configuration and licensing, you may not see all of the options available to you described below.

**To Write an Appraisal for Your Direct Report**

1. In the My Tasks area, click Write appraisals for your direct reports under the appropriate process.

2. Click Edit Appraisal for the employee you want to write the appraisal for.

3. Complete the form as required.
Assigning Your Direct Reports to Another Manager

As a manager, you can assign direct reports to another manager. You can do this if you think a different manager would be better suited to write the employee’s appraisal.

To Assign a Direct Report to Another Manager

1. In the My Tasks area, click Write appraisals for your direct reports under the appropriate process.

2. Select the check box(es) next to the direct report(s) you want to assign to a new manager.
3 Click Assign to Other Manager.

4 In the Last Name and/or First Name box(es), type the first few letters of the employee’s last and/or first name(s), and then click Search.
   Tip: If you need to show more information about the available employees, in the Show Additional Information list, click either Department or Email Address.

5 In the Available Employees box, click the manager you want to assign your direct report to, and then click OK.
   This employee has now been assigned to the new manager.

Adding Past or New Goals to Your Direct Reports

If configured by your administrator, you can add a goal to the appraisal, New Goals or Past Goals section for one or many of your Direct Reports. Furthermore, for a New Goals, you can link the New Goals to Organizational Goals.

Note: By default, New or Past Goals will only show a title, a description, and Goal linking options. However, depending on the configuration and if all selected Direct Reports, are all assigned the same form, you can edit other fields such as start date, due date, and so forth.

To Add New or Past Goals to Your Direct Reports

1 In the My Tasks area, click Write appraisals for your direct reports under the appropriate process.

2 Select the check box(es) next to the Direct Report(s) you want to assign the New or Past Goal to.

3 Do any of the following:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a Past Goal</td>
<td>Click Add Goal and click Past Goal and then enter a title and description for the Past Goal.</td>
</tr>
<tr>
<td>Add a New Goal</td>
<td>Click Add Goal and click New Goal and then enter a title and description for the New Goal.</td>
</tr>
</tbody>
</table>
| Add and link a New Goal to an Organizational Goal | Click Add Goal and click New Goal, click the link to organizational goal icon, then select the check box next to the Organizational Goal, and then do either of the following:  
   • To link to the Organizational Goal but use your own title and description, click Link, and then enter a title and description for the Goal.  
   • To copy the title and description of the Organizational Goal, click Copy and Link. |
Assigning a Third Party Reviewer

You may send an appraisal to a third party reviewer. For example, if an employee worked for a manager other than his or her reporting manager, that manager may be asked to review the employee's appraisal.

To Assign a Third Party Reviewer

1. In the My Tasks area, click Write appraisals for your direct reports under the appropriate process.
2. Click Edit Appraisal for the employee for whom you want to assign a third party reviewer.
3. Click Send for Review.
4. In the Last Name and/or First Name box(es), type the first few letters of the employee’s last and/or first name(s), and then click Search.
   Tip: If you need to show more information about the available employees, in the Show additional information list, click either Department or Email Address.
5. In the Available Employees box, click the employee you want to perform the review, and then click Send.

To Take Back Control of a Form Sent to a Third Party for Review

1. Click View Appraisal next to the employee appraisal that was sent for review. Appraisals that are sent for review will be marked by this icon.
2. Click Cancel Review and click OK.
   This will return control of the appraisal to the direct manager.

Approving Appraisals Written by Direct Managers

You may need to approve appraisals written by direct managers for their direct reports.
To Approve an Appraisal Written for Your 2nd, 3rd or 4th Level Reports

1. In the My Tasks area, click Approve appraisals for second level reports under the appropriate process.
   
   Note: If you are a 3rd or 4th level manager, the step above will be called “Approve appraisals for third level reports” or “Approve appraisal for fourth level reports,” respectively.

2. Click Review & Approve for the appropriate employee.

3. Review the appraisal, taking care to read any previous annotations as indicated by the Review Annotation icon (if applicable). You must read all of the annotations before you can approve the appraisal.

4. (Optional) Do any of the following:
   
   - If you want to add your own annotations for the employee, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon . For more information, see “About Annotations” on page 54.
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

5. Do one of the following:
   
   - If you want to save your work and finish approving the appraisal later, click Save, and then click OK.
   - If you do not want to approve the appraisal, or you have added annotations that must be read by the author, click Send Back to Author.
   - If the appraisal does not require further revision, click Approve.

   Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Meeting with Your Direct Reports to Review Appraisals

You may be required to meet with your direct reports to review their appraisals.

If the form includes a Succession Planning section, and you do not want your direct report to view the section, see “Hiding and Restoring a Succession Planning Section” on page 60.
To Meet with Your Direct Reports to Review Appraisals

1. In the My Tasks area, click Meet with direct reports to review appraisals under the appropriate process.

2. Do one of the following:
   • If you want to complete the step right away without viewing the form, click Mark as Completed for the appropriate employee, and then click OK to confirm.
   • If you want to view the employee’s appraisal, click View Appraisal for the appropriate employee and then go on to step 3.

3. (Optional) Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form before meeting with your direct reports, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.
   • If present and you want to hide the Succession Planning section so that the employee cannot see it, click the up arrow icon on the title bar. To restore the section view click the down arrow icon .

   Note: Both the printed and PDF versions of the manager form will include the Succession Planning section, regardless of whether the section has been hidden from view.

4. After conducting the meeting with the employee, click Mark as Completed.

   Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Launching Halogen e360

The purpose of Halogen e360 is to enable managers to view evaluations from current and past Halogen e360 degree feedback in the performance appraisal.

To Launch Halogen e360

1. From the My Tasks area, click the step that allows you to complete appraisals for your direct reports.

2. Click View Appraisal for the appropriate employee.

3. Click Show next to Halogen e360.

   Select an evaluation from Halogen e360 displayed in the bottom half of the split screen.
4 Note: Halogen e360 is licensed separately from the Halogen eAppraisal module. If licensed, you will be logged in automatically and able to select e360 evaluations.

**Adding Final Comments to Your Direct Reports’ Appraisals**

You may be required to add final comments to your direct reports’ appraisals.

To Add Final Comments to Your Direct Reports’ Appraisals

1 In the **My Tasks** area, click **Add final comments to your direct reports’ appraisals** under the appropriate process.

2 Click **Review & Comment** for the appropriate employee.

3 Add your comments to the form.

4 (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   - If you want to check spelling on the form, click the Check Spelling icon . For more information, see “Checking Spelling on a Form” on page 57.
   - If you want to check for inappropriate language on the form, click the Check Language icon . For more information, see “Checking for Inappropriate Language on a Form” on page 58.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

5 After adding your final comments, click **Complete**, and click **OK** to confirm.

   **Tip:** If you have multiple employees in your list for which you must perform the same task, you can click **Next Employee** or **Previous Employee** to move to the next or previous available employee in your list.

**Signing Off on Appraisals**

You may be required to sign off on the appraisals that have been completed for your direct reports.
To Sign off on an Appraisal

1  In the My Tasks area, click Sign off appraisals for direct reports under the appropriate process.
   **Note:** If you are a 2nd level manager, the above step will be called “Sign off appraisals for second level reports.”

2  Click View Appraisal for the appropriate employee.

3  (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

4  After reviewing the form, click Sign Off. If your process uses electronic signatures, enter your password and then click OK.
   **Tip:** If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

**Performing a Combined Sign-off with an Employee**

In certain organizations, such as in some manufacturing environments, employees might not have their own computers. In this scenario, your administrator may configure combined sign-off. In a combined sign-off, you access the employee’s sign-off task using your own computer and login information, and then you let the employee enter his/her password to sign-off on the appraisal.

**To Perform a Combined Sign-off with an Employee**

1  In the My Tasks area, click Employee sign-off under the appropriate process.

2  Do either of the following:
   - Click Sign Off for the appropriate employee, and then go to step 5.
   - Click View Appraisal for the appropriate employee, and then go on to step 3.
Chapter 4: Manager Tasks

3 (Optional) Do any of the following:

- If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
- If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
- If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
- If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

4 Click **Sign Off**.

5 Prompt the employee to enter his/her password in the **Password** box.

6 Click **OK**.

**Working with Reports**

With Halogen eAppraisal, there are several reports available to you. You can view these reports and export them to Microsoft Excel if required. For more information, see any of the following:

- “Viewing a Score Report” on page 28
- “Viewing a Competency Rating Report” on page 29
- “Viewing a Goals Report” on page 30
- “Viewing a Development Plan Report” on page 31
- “Viewing a Goals Report” on page 30
- “Viewing an Evaluation Process Status Report” on page 33
- “About Exporting Reports to Microsoft Excel” on page 34

**Viewing a Score Report**

The Score Report details your employee’s overall scores. It can also display their scores on individual competencies.

Use this report if you want a quick summary of your employee’s scores in an individual competency, or an entire process. You can also use this report to view the scores of all the reports in your chain of command, not just your direct reports.
To View a Score Report

1. Click Reports.

2. In the Name column, click Score.
   The Score Report displays in a new window.

3. (Optional) Filter the report by doing any of the following:
   - In the Process list, click a process to view scores from an individual process.
   - In the Form list, click a form to view scores from a specific form.
   - In the Competency list, click a competency to view scoring for that competency only.
   - In the Overall Score list, click an option, such as Greater Than, Less Than, and so forth, and then enter a value in the field.
   - In the Include Incomplete Results list, click Yes or No.
   - In the Employees area, click Direct Reports to view the results of your direct reports, or click All Reports to view the results of all reports in your chain of command.

4. Click Generate Report.

5. (Optional) Do any of the following:
   - In the Action column, click Edit to view a completed appraisal or edit an in-progress appraisal.
   - If a direct report manages other people, an icon is shown to the left of the person’s name indicating that person is a manager. Click the icon to display the direct reports of that person. To return, click Back.
   - In the Employee column, click an employee’s name to view his/her scores on individual competencies.
   - If you want to sort the Employee or Overall Score column, click the column header.
   - If you want to export this report to Microsoft Excel, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.

Viewing a Competency Rating Report

The Competency Rating Report identifies the number of employees that were assigned a rating in each competency point scale. For example, five employees received a rating of “3” in the “Customer Focus” competency, and two employees received a rating of “4” in the “Productivity” competency. Unlike the Score Report, the employee’s name is not shown in this report.

Use this report if you want to view competency ratings expressed in a percentage format, rather than in a numerical scoring format. Since employee names do not appear on this report, it is a good report to use if you want to view strengths and areas of improvement within a group of employees.
To View a Competency Rating Report

1. Click Reports.

2. In the Name column, click Competency Rating.
The Competency Rating Report displays in a new window.

3. In the Process list, click the process containing the competencies you want to view.

4. (Optional) Filter the report by doing any of the following:
   - In the Employees area, click Direct Reports to view your direct reports, or click All Reports to view all reports in your chain of command.
   - In the Filter By area, if you want to view specific employee fields, such as job code, department, and so forth, select a filter option, then click Select and select from the list, and then click OK.
   - In the Available Competencies area, click the competency you want to add, or click -All- to add all competencies, and then click Add.

5. Click Generate Report.

6. (Optional) Do any of the following:
   - If you want to sort a column, click a column header. Click the same column header again to sort in the opposite direction.
   - If you want to export this report to Microsoft Excel, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.

Viewing a Goals Report

The Goals Report provides a list of your employees’ goals by showing either their personal goals or organizational goals. Goal details such as the title, details, status, flag, and percent complete are included in the report.

Use this report to get a quick look at all of your employees’ goals and answer the following types of questions:

- Which of my employees have goals with a status of “Not started”?
- Do my employees have any unapproved goals?

To View a Goals Report

1. Click Reports.

2. In the Name column, click Goals.
The Goals Report displays in a new window.
3 (Optional) Filter the report by doing any of the following:
   • In the Process list, click a process to view goals from a single process only.
   • In the Goals area, click All Goals if you want to view all goals, and click Organizational Goals if you want to view organizational goals only.
   • In the Display Options area, if desired click Group by category, and from the Show Columns area select or clear the check boxes to show or hide goal details from the report. For example, clear the Flag check box if you don’t want to see the Flag column in the report.
   • In the Filter Options area, select either Direct Reports, All Reports or Selected Employee (click an employee in the list) from the Employees area; click a Status from the list; click a Category from the list; and/or select the Show only unapproved goals check box.

4 Click Generate Report.

5 (Optional) Do any of the following:
   • If you want to sort a column, click a column header. Click the same column header again to sort in the opposite direction.
   • If you want to export this report to Microsoft Excel, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.

**Viewing a Development Plan Report**

A Development Plan Report provides a list of all of your employee’s development plans. Details of the development plan, such as the title, details, status and so forth, are included in the report.

Use this report if you want a quick summary of your employees’ development plans. For example, you can generate a development plan report to see the status of all of your employees’ development plans and take action for the ones that are incomplete or late.

You can view all of the development plans for all of your employees, or you can view process-defined development plans, which are development plans created on a form during a specific process. You can also view development plans for a specific category or competency being developed.

**To View a Development Plan Report**

1 Click Reports.

2 In the Name column, click Development Plan.
   The Development Plan Report displays in a new window.
3 (Optional) Filter the report by doing any of the following:
   • In the Process list, click a process to view.
   • In the Status list, click a status.
   • In the Related Competency list, click a competency.
   • In the Category list, click a category.
   • In the Employees area, click Direct Reports to view your direct reports, or click All Reports to view all reports in your chain of command.

4 Click Generate Report.

5 (Optional) Do any of the following:
   • If a direct report manages other people, an icon ⬇️ is shown to the left of the person’s name indicating that person is a manager. Click the icon to display the direct reports of that person. To return, click Back.
   • If you want to export this report to Microsoft Excel, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.

Viewing a Job Description Assignment Report

The Job Description Assignment report allows you to filter and report on various details related to job descriptions. Only users granted permissions will be able to view and run reports.

You must have Halogen Job Description Builder licensed to view this report.

To View a Job Description Assignment Report

1 Click Reports.

2 In the Name column, click Job Description Assignment.
   The report displays in a new browser window.

3 (Optional) Do any of the following:
   • To filter by job category, click Job Category, and then click a category in the list.
   • To filter by a specific job description, click Selected Job Descriptions, then click Select, if required, select the Include Archived check box, then click Search, then click the job description, then click Add, and then click OK.
   • In the Employees area, click Direct Reports or All Reports.
   • In the Assignment and Sign-off Options area, click Employee Assignment Count, and then click an option from the list.
   • Click Sign-off Status, and then click an option from the list.
   Note: To search based on Employee Assignment Count, All Job Descriptions must be selected in the Job Descriptions area.
   • Click Assigned Status, and then click an option from the list.
4 Click **Generate Report**.

**Tips:**
- To select different columns in the report, click **Select Columns**, then select the column(s) you want to add, then click **Add**, then click **OK**, and then click **Generate Report** to update the columns.
- Click **Reset** to remove all filters, restore columns to their defaults, and so forth.
- To print the report, click the print icon.
- If you want to export this report to *Microsoft Excel*, click the Export icon. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.

**Viewing an Evaluation Process Status Report**

The Evaluation Process Status Report provides a list of evaluation steps and the status of each step for your direct reports.

**To View an Evaluation Process Status Report**

1 Click **Reports**.

2 In the **Name** column, click **Evaluation Process Status**.

3 In the **Process** list, click a process to view.

4 Click **Generate Report**.

5 (Optional) Do any of the following:
   - If you have Direct Reports who are managers, click the name link to view the status for their employees. You can click the **Direct Reports** breadcrumb links to navigate through previously selected Direct Reports.
   - Under the **Evaluations completed for this step** column, click the report icon in the **Report** column to view the detailed status for that step.
   - Under the **Evaluations currently in this step** area, click the view report icon to view the status for that step.
   - If you want to export this report to *Microsoft Excel*, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.
About Exporting Reports to Microsoft Excel

You can export reports to a spreadsheet program, such as Microsoft Excel. When you export your reports, the first worksheet displayed in your workbook contains the cover page information, and subsequent worksheets contain the report data. The cover page contains information such as the report title, the date it was generated, and so forth. Text formatting such as bold and underlines are exported but images are not.

![Figure 4-1 Example of a report viewed in Microsoft Excel](image)

Click any of the other worksheets at the bottom of the screen to view the report data.

Multirater Tasks

Multirater is an optional module that is used to gather feedback on an employee’s performance from a variety of people, such as the employee (self), peers, managers, direct reports, and so forth. As a manager, you have several privileges relating to Multirater. For example, if configured by your administrator, you may be able to launch a Multirater process, approve evaluators chosen by subjects, and so forth. The following list details the Multirater tasks available to you:

- “Launching a Multirater Assessment” on page 35
- “Approving Multirater Evaluators” on page 36
- “Viewing the Status of a Multirater Assessment” on page 37
Launching a Multirater Assessment

Depending on your process options and if you have the optional Multirater module installed, you may be able to launch a Multirater assessment for your employees to solicit feedback from others regarding the performance of the employee. For example, you might launch a Multirater assessment for an employee if he/she has not worked for you for very long and you feel another person might have valuable input into his/her performance. As another example, you could launch a Multirater assessment if you want to solicit feedback from an employee’s peers.

To Launch a Multirater Assessment

1. In the My Tasks area, click Write appraisals for your direct reports under the appropriate process.

2. Click Edit Appraisal for the appropriate employee.

3. Do either of the following:
   - If you are launching the process for the first time, click Launch Multirater.
   - If you have launched the process previously and you want to make changes, click Manage Multirater.

   A list of available competencies and/or questions appears with all available options selected by default.

4. Clear any check boxes next to any competencies and/or questions that do not apply to the situation, person, or group being asked to evaluate the employee.

5. Click Next.

6. Do either of the following:
   - If required, and if configured for your Multirater assessment, you can select the Send to the employee to select evaluators check box if you want the employee to choose his/her evaluators. If you select this check box, go on to step 10.
   - If you want to choose the employee’s evaluators yourself, go on to step 7.

7. To search for a specific evaluator, in the Last Name and/or First Name box(es), enter the employee’s name, and then click Search.

8. In the Available Employees area, click the employee, then select a relationship (Direct Report, Manager, Peer, or Self) from the list, and then click Add.

9. Repeat step 8 to add more evaluators as required.
10 Click Deploy.

An email notification will be sent to the evaluators you selected prompting them to begin the Multirater assessment.

**Note:** Depending on the process options, the employee may be allowed to select his/her evaluators or you may request the employee to do so. If the employee selects his/her evaluators, you may be required to approve them. For more information, see “Approving Multirater Evaluators” on page 36.

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**Approving Multirater Evaluators**

Depending on the options configured for a Multirater assessment, you may be required to approve Multirater evaluators. If you must approve evaluators, you will see this step in your task list.

**To Approve Multirater Evaluators**

1. In the **My Tasks** area, click **Approve Multirater evaluators selected by your direct reports** under the appropriate process.

2. Click **Review & Approve** for the employee that has selected evaluators.

3. Select an employee in the **Pending Participants** box, and then click either **Deny** or **Approve**.
   
   If you are satisfied with the list of approved participants, go to step 7.

4. If you want to add one or more evaluators, enter the first few letters of the employee’s last and/or first name in the **Last Name** and/or **First Name** boxes, and then click **Search**.
   
   The search results appear in the **Employees** box.

5. Select an employee, then select an option in the **Select a relationship** list, and then click **Add**.
   
   For example, if you select an employee that is an equal or a peer to the employee being evaluated, select **Peer** in the **Select a relationship** list.

6. (Optional) If you want to include additional evaluators for the employee but do not want to select the additional evaluators yourself, select the **Return to the employee to change their evaluator selections** check box.

7. Click **OK**, and then click **OK** again to confirm.
Viewing the Status of a Multirater Assessment

When you send out a Multirater assessment, you can track the status of it when you view the employee’s form. When you view the status, you can see information such as the number of evaluations under approval, the number of scheduled evaluations, the number of completed evaluations, and so forth.

You can notify evaluators that have not completed their assessments when you view the status, and you can also export the Multirater status information.

To View the Status of a Multirater Assessment

1. In the My Tasks area, click Write appraisal for your direct reports under the appropriate process.
2. Click Edit Appraisal for the employee whose Multirater status you want to view.
3. Click the Split Screen icon, and then click Status.
4. (Optional) Do any of the following:
   - To view the selected Multirater criteria or add more Multirater evaluators, click Manage Multirater.
   - To send an email to all evaluators that have not completed their evaluation, click Notify All Not Completed.
   - To send an email notification to an individual evaluator, click the notify icon in the Notify column.
   - To export the status report, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.
   - To view why an evaluator declined an assessment, click Declined.

Viewing Multirater Reports

After a Multirater assessment has been launched, you can use the split screen to view Multirater reports while writing an employee’s appraisal. Note that subjects of Multirater processes—if configured by the administrator—can also view Multirater reports.

You can view a Multirater report based on the relationship group (Self, Peer, Manger, and so forth) and you can view a Multirater report based on the rater alone. In addition, you can view a tabular report of Multirater data, which shows data only (no graphs).

To View Multirater Reports

1. In the My Tasks area, click Write appraisal for your direct reports under the appropriate process.
2. Click Edit Appraisal for the employee whose Multirater status you want to view.
3 Click the Split Screen icon ![Split Screen icon](image1), and then click Reports.

The Multirater reports appear in a split screen below the form.

4 In the Reports list, do one of the following:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>View a Multirater report based on relationships (Self, Peer, Manager, Direct Report, and so forth)</td>
<td>Click Summary Report by Relationship Group, and then, if required, click an option in the Criteria list.</td>
</tr>
<tr>
<td>View a Multirater report showing an individual rater only</td>
<td>Click Summary Report by Rater, then, if required, click an option in the Criteria list, and then click a rater in the Rater Name list.</td>
</tr>
<tr>
<td>View a Multirater report in a tabular format (no bar graphs, data only)</td>
<td>Click Tabular Report by Rater, and then, if required, click a competency in the Criteria list.</td>
</tr>
</tbody>
</table>

**Tip:** Move your mouse pointer over the initials in the column header of the report to view the rater’s full name. Similarly, move your mouse pointer over the “Self” column header to view the respondent’s full name.

5 (Optional) Do any of the following:

* If you want to export this report to Microsoft Excel, click Export. For more information, see “About Exporting Reports to Microsoft Excel” on page 34.
* To print the report, click Print.
Chapter 5

HR Representative Tasks

Chapter Scope

This section provides a detailed explanation of the various tasks that an HR Representative may be required to perform in the course of a typical appraisal process.

The section topics are as follows:

- “Assigning Representees to Another HR Representative” on page 40
- “Assigning Representees to Different Managers” on page 40
- “Assigning Appraisal Forms” on page 41
- “Adding Optional Competencies to a Form” on page 41
- “Approving Appraisals for Representees” on page 42
- “Approving Self-Appraisals for Representees” on page 43
- “Meeting with Representees to Review Appraisals” on page 44
- “Adding Final Comments to Appraisals” on page 44
- “Signing Off on Appraisals” on page 45
Assigning Representees to Another HR Representative

If you find that you have been assigned a representee who should be assigned to another HR Representative, you may change the assignment at any time during the course of an appraisal process.

To Assign a Representee to Another HR Representative

1. In the **My Tasks** area, do either of the following:
   - Click **Assign a manager to each representee** under the appropriate process.
   - Click **Assign forms to representees** under the appropriate process.

2. Select the check box(es) next to the employee(s) you want to assign to another HR Representative.

3. Click **Assign to Other HR Rep.**
   **Note:** Depending on how the process is configured, the button name mentioned above might be slightly different.

4. In the **Last Name** and/or **First Name** box(es), type the first few letters of the HR Representative’s last and/or first name(s), and then click **Search.**
   **Tip:** If you need to show more information about the available employees, in the **Show Additional Information** list, click either **Department** or **Email Address.**

5. In the **Available Employee** box, click the HR Representative you want to assign to the employee, and then click **OK.**
   This employee has now been assigned to the new HR Representative.

Assigning Representees to Different Managers

If you find that a representee should be assigned to another manager, you may change the assignment at any time.

**Note:** This step has to be set up by the administrator before you can complete this task. If the task has not been set up, contact your administrator if you want to assign a representee to another manager.

To Assign a Representee to a Different Manager

1. In the **My Tasks** area, click **Assign a manager to each representee** under the appropriate process.

2. Select the check box(es) next to the employee(s) you want to assign to another manager, and then click **Assign to Other Manager.**
   **Note:** Depending on how the process is configured, the button name mentioned above might be slightly different.
Assigning Appraisal Forms

3 In the **Last Name** and/or **First Name** box(es), type the first few letters of the manager’s last and/or first name(s), and then click **Search**.

**Tip:** If you need to show more information about the available employees, in the **Show Additional Information** list, click either **Department** or **Email Address**.

4 In the **Available Employees** box, click the manager you want to assign to the employee, and then click **OK**.

This employee has now been assigned to the new manager.

**Assigning Appraisal Forms**

You can assign an appraisal form to representees as long as the form is not currently in use for the selected representee.

**Note:** If the administrator has assigned a form other than the default, you will not be able to change the assignment.

**To Assign an Appraisal Form**

1 In the **My Tasks** area, click **Assign forms to representees** under the appropriate process.

2 Select the check box(es) next to the representee(s) you want to assign a form to, and then click **Assign Form**.

3 Do either of the following:
   * In the **Available Forms** box, click the form you want to assign.
   * To select the default form, click **Select Default Form**.

4 (Optional) If you want to view the details of the form, click the form in the **Available Forms** box to display them in the **Form Details** area.

   **Note:** You may need to click the down arrow icon in the **Form Details** area to view the details.

5 Click **Assign**.

**Adding Optional Competencies to a Form**

If a form has optional competencies associated with it, you can add them to the form as long as the form is not currently in use.

**To Add Optional Competencies to a Form**

1 In the **My Tasks** area, click **Assign forms to representees** under the appropriate process.

2 Select the check box next to the representee(s) you want to add optional competencies to.

3 Click **Assign Form**.
Chapter 5: HR Representative Tasks

4 In the Available Forms list, select the form containing the optional competencies.

5 Click the down arrow icon to open the Optional Competencies Selection area.

6 In the Optional Competencies area, use the lists beside Section and Group to display all related competencies in the Available Optional Competencies list.

7 Click a competency, and then click Add.
   Descriptions of competencies display in the Description box.

8 Repeat the steps to continue adding competencies.

OR To remove an optional competency, click a competency from the Selected Optional Competencies list, and then click Remove.

9 When you are done, click Assign.

Approving Appraisals for Representees

Once managers have written appraisals for their direct reports, you may be required to review and approve the appraisals.

To Approve Appraisals for Representees

1 In the My Tasks area, click Approve appraisals for representees under the appropriate process.

2 Click Review & Approve for the appropriate employee.

3 Review the appraisal. Take care to read any previous annotations, as indicated by the Review Annotation icons. All annotations must be read before you can approve the appraisal.

4 (Optional) Do any of the following:
   • If you want to add your own annotations for the employee, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon. For more information, see “About Annotations” on page 54.
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon, and then click the record you want to view.
Approving Self-Appraisals for Representees

5 Do one of the following:
   • If you want to save your work and finish approving the appraisal later, click **Save**.
   • If you do not want to approve the appraisal, or you have added annotations to it that must be read, click **Send Back to Author**.
   • If the appraisal does not require any changes, click **Approve**.

6 Click the close icon  

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click **Next Employee** or **Previous Employee** to move to the next or previous available employee in your list.

---

**Approving Self-Appraisals for Representees**

Once a representee has written their self-evaluation, you may be required to review and approve it.

**To Approve Self-Appraisals**

1 In the **My Tasks** area, click **Approve self-appraisals for representees** under the appropriate process.

2 Click **Review & Approve** for the self-appraisal you want to review.

3 Review the self-appraisal, taking care to read any previous annotations, as indicated by the Review Annotation icons . All annotations must be read before you can approve the appraisal.

4 (Optional) Do any of the following:
   • If you want to add your own annotations for the employee, click the Add Annotation icon to add them. Annotations that you add will display the Annotation Added icon . For more information, see “**About Annotations**” on page 54.
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “**Expanding or Collapsing the Form Navigator**” on page 56.
   • If you want to print the form, click the Print icon . For more information, see “**Printing Forms**” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “**Showing Forms as PDF**” on page 57.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

5 Do one of the following:
   • If you want to save your work and finish approving the appraisal later, click **Save**.
   • If you do not want to approve the appraisal, or you have added annotations to it that must be read, click **Send Back to Author**.
   • If the appraisal does not require any changes, click **Approve**.
6 Click the close icon \(\times\).

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

### Meeting with Representees to Review Appraisals

Depending on your process, you may be required to meet with your representees to review their appraisals.

#### To Meet with Representees to Review Appraisals

1 In the My Tasks area, click Meet with representees to review appraisals under the appropriate process.

2 Do either of the following:
   - If you want to mark the meeting as completed without viewing the form first, click Mark as completed.
   - If you want to view the appraisal before marking the meeting as complete, click View Appraisal, and then go on to step 3.

3 (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon \(\uparrow\). For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form before meeting with your direct reports, click the Print icon \(\leftarrow\). For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon \(\rightarrow\). For more information, see “Showing Forms as PDF” on page 57.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon \(\downarrow\)., and then click the record you want to view.

4 After conducting the meeting with the employee, click Mark as Completed.

5 Click OK.

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

### Adding Final Comments to Appraisals

After the appraisals have been reviewed and approved, you may have the opportunity to add your final comments.
To Add Final Comments to an Appraisal

1. In the My Tasks area, click Add final comments to your representees' appraisals under the appropriate process.
2. Click Review & Comment for the appropriate employee.
3. Enter your comments in the appraisal form.
4. (Optional) Do any of the following:
   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon, and then click the record you want to view.
   - If you want to check spelling on the form, click the Check Spelling icon. For more information, see “Checking Spelling on a Form” on page 57.
   - If you want to check for inappropriate language on the form, click the Check Language icon. For more information, see “Checking for Inappropriate Language on a Form” on page 58.
5. Do one of the following:
   - If you want to save your work and finish adding comments later, click Save.
   - When you have finished adding comments, click Complete, and then click OK to confirm.

Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Signing Off on Appraisals

You may be required to sign-off on the appraisals that have been completed for your assigned representees.

To Sign Off on an Appraisal

1. In the My Tasks area, click Sign off appraisal for representees under the appropriate process.
2. Do either of the following:
   - To view the appraisal before signing off, click View Appraisal, and then go on to step 3.
   - To sign-off right away without viewing the appraisal, click Sign Off, and then click OK to confirm.

Note: If your process uses electronic signatures, you must enter your password during sign-off.
3 Review the appraisal.

4 (Optional) Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon, and then click the record you want to view.

5 Click Sign Off.
Chapter 6

If you are a Project Leader

Chapter Scope

This section provides a detailed explanation of the various tasks that a Project Leader may be required to perform in the course of a typical appraisal process.

The section topics are as follows:

• “Assigning Appraisal Forms to Project Employees” on page 48
• “Writing Appraisals for Your Project Employees” on page 48
• “Meeting with Your Project Employees to Review Appraisals” on page 49
• “Adding Final Comments to Your Project Employees’ Appraisals” on page 50
• “Signing Off on Your Project Employees’ Appraisals” on page 51
Assigning Appraisal Forms to Project Employees

Depending on your process, you may be required to assign appraisal forms to your project employees. You can change the form assignment for each of your project employees as long as the form is not currently in use for the selected employee.

**To Assign Appraisal Forms to Project Employees**

1. In the **My Tasks** area, click **Assign forms to project employees** under the appropriate process.
2. Select the check box(es) next to the project employee(s) you want to assign a form to.
3. Click **Assign Form**.
4. Do any of the following:
   - In the **Available Forms** box, click the form you want to assign.
   - To select the default form, click **Select Default Form**.
5. (Optional) If you want to view the details of the form, click the form in the Available Forms box to display them in the Form Details area.
   
   **Note:** You may need to click the down arrow icon to display the **Optional Competencies Selection** and/or **Form Details** area(s).
6. Click **Assign**.

Writing Appraisals for Your Project Employees

As the project leader, you may be required to write appraisals for your project employees.

**To Write Appraisals for Your Project Employees**

1. In the **My Tasks** area, click **Write appraisals for your project employees** under the appropriate process.
2. Click **Edit Appraisal**, for the employee you want to write the appraisal for.
3. Complete the form as required.
Meeting with Your Project Employees to Review Appraisals

You may be required to meet with your project employees to review their appraisals.

To Meet With Your Project Employees to Review Appraisals

1 In the My Tasks area, click Meet with project employees to review appraisals under the appropriate process.

2 Do one of the following:
   • If you want to complete the step right away without viewing the form, click Mark as Completed for the appropriate employee and then click OK to confirm.
   • If you want to view the project employee’s appraisal, click View Appraisal for the appropriate employee and then go to step 3.
3 (Optional) Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form before meeting with your project employees, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.

4 After conducting the meeting with the project employee, click Mark as Completed.

Tip: If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

Adding Final Comments to Your Project Employees’ Appraisals

You may be required to add final comments to your project employees’ appraisals.

To Add Final Comments to Your Project Employees’ Appraisals

1 In the My Tasks area, click Add final comments to your project employees’ appraisals under the appropriate process.

2 Click Review & Comment for the appropriate employee.

3 Add your comments to the appraisal form.

4 (Optional) Do any of the following:
   • If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon . For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   • If you want to print the form, click the Print icon . For more information, see “Printing Forms” on page 56.
   • If you want to show the form as a PDF file, click the Show as PDF icon . For more information, see “Showing Forms as PDF” on page 57.
   • If you want to check spelling on the form, click the Check Spelling icon . For more information, see “Checking Spelling on a Form” on page 57.
   • If you want to check for inappropriate language on the form, click the Check Language icon . For more information, see “Checking for Inappropriate Language on a Form” on page 58.
   • If you want to view other employee records in a split screen below the form, click the Split Screen icon , and then click the record you want to view.
5 After adding your final comments, click **Complete**, and then click **OK** to confirm.

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click **Next Employee** or **Previous Employee** to move to the next or previous available employee in your list.

---

**Signing Off on Your Project Employees’ Appraisals**

You may be required to sign off on the appraisals that have been completed for your project employees.

**To Sign Off on Your Project Employees’ Appraisals**

1. In the **My Tasks** area, click **Sign off appraisals for project employees** under the appropriate process.

2. Click **View Appraisal** for the appropriate employee.

3. (Optional) Do any of the following:

   - If you want to expand or collapse the form navigator, click the Expand/Collapse Navigator icon. For more information, see “Expanding or Collapsing the Form Navigator” on page 56.
   - If you want to print the form, click the Print icon. For more information, see “Printing Forms” on page 56.
   - If you want to show the form as a PDF file, click the Show as PDF icon. For more information, see “Showing Forms as PDF” on page 57.
   - If you want to view other employee records in a split screen below the form, click the Split Screen icon, and then click the record you want to view.

4. After reviewing the form, click **Sign Off**. If your process uses electronic signatures, enter your password and then click **OK**.

**Tip:** If you have multiple employees in your list for which you must perform the same task, you can click **Next Employee** or **Previous Employee** to move to the next or previous available employee in your list.
Chapter 6: If you are a Project Leader
Chapter 7

Working with Forms

Chapter Scope

This section provides detailed information on tasks you can perform while working with forms.

The section topics are as follows:

- “About Working With Forms” on page 54
- “About Annotations” on page 54
- “Expanding or Collapsing the Form Navigator” on page 56
- “Printing Forms” on page 56
- “Showing Forms as PDF” on page 57
- “Checking Spelling on a Form” on page 57
- “Checking for Inappropriate Language on a Form” on page 58
- “Viewing Employee Records in a Split Screen on a Form” on page 59
- “Hiding and Restoring a Succession Planning Section” on page 60
- “Adding Development Plans, Past Goals, and New Goals to the Form” on page 60
- “Using Comment Helper and Coaching Tips” on page 63
About Working With Forms

Halogen’s Talent Management Suite is highly customizable. In addition, one organization’s forms can be very different from the forms used at another organization. As a result, some of the functionality mentioned in this section may not apply to how the software has been configured for your organization.

In addition, this section references optional Halogen Software modules such as eLearning Manager and Multirater. For more information on these modules, contact your administrator.

About Annotations

When reviewing or approving a form, you may have a question or comment for the author. Adding annotations allows you to ask specific questions or to provide your comments to the person who authored the content in order to get clarification. For example, you might want to add an annotation asking the employee to provide an example as to why he/she gave him/herself a high score for a competency on a self-appraisal.

Similarly, an employee might have a comment or a question for you, which he/she can add as an annotation. You must read these annotations before approving the form.

Annotation icons indicate the types of annotation. For more information, see the table below.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>This icon indicates that you must review the annotation before you can complete your assigned task. Click this icon to read the annotation.</td>
</tr>
<tr>
<td>🛠️</td>
<td>This icon indicates that you can create an annotation if required. Click this icon to create a new annotation.</td>
</tr>
<tr>
<td>📝</td>
<td>This icon indicates an annotation that you have added or an annotation created by someone else that you have read. Click this icon to view or edit your annotation.</td>
</tr>
</tbody>
</table>

For more information about annotations, see any of the following:

- “Reviewing Annotations” on page 55
- “Adding Annotations” on page 55
- “Viewing and Editing Your Annotations” on page 55
**About Annotations**

**Reviewing Annotations**

Depending on your organization’s process, annotations may or may not be configured for use. If your organization uses annotations and you are the author or approver of a form, you must review all annotations that have been added.

**To Review an Annotation**

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the Review Annotation icon.

3. Review the annotation.

4. (Optional) If you want to enter a response to the annotation, enter it in the New Annotation box.

5. Click OK.
   
   The annotation icon changes to the View/Edit Annotation icon.

**Adding Annotations**

Depending on your process, you may be able to add annotations to sections of a form. These annotations must then be read by the author or the approver of the form.

**To Add Annotations**

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the Add Annotation icon.

3. In the New Annotation box, enter the annotation.

4. Click OK.
   
   The View/Edit Annotation icon appears indicating that you have added an annotation for the author.

**Viewing and Editing Your Annotations**

If you decide that you want to view or edit the content of an annotation that you have added, you can do so on the form.
To Edit Your Annotations

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the View/Edit Annotation icon.

3. In the Annotation box, edit the annotation as required.

4. Click OK.

Expanding or Collapsing the Form Navigator

The form navigator, located on the left side of the form, provides quick access to individual sections of the form. If you have a long form you can use the form navigator to quickly move to the form section you want without having to scroll the length of the form.

By default, the form navigator is expanded when you open the form. However, you can collapse the form navigator at any time if you do not want to use it.

To Expand or Collapse the Form Navigator

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the Expand/Collapse Navigator icon.

3. Click the Expand/Collapse Navigator icon again to expand the navigator.

Printing Forms

If required, you can create a hard copy of a form by printing it. You can print forms in either of the following formats:

- Normal Print
- Condensed Print

The “Normal Print” format prints the entire form as it appears on your screen. The “Condensed Print” format prints the form with only the ratings shown.

You can also choose to stop sections from breaking across pages when you print the form.

To Print the Form

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the Print icon.
3 Do one of the following:
   • To print the form exactly as it appears on your screen, click Normal Print.
   • To print the form with only the ratings chosen, click Condensed Print.

4 (Optional) If you want stop sections from breaking across pages, clear the Allow Sections to break across pages check box.

5 Click OK.

6 Print the form using your web browser’s print feature.

**Showing Forms as PDF**

There may be times when you would like to create an Adobe PDF version of a form. Once you have a PDF copy of the form, you can then print it, share it with others, and so forth.

**To Show a Form as PDF**

1 If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2 Click the Show as PDF icon.
   The form opens in your PDF reader.

**Checking Spelling on a Form**

When you check spelling on a form, you can either check your spelling in the entire form, or you can check your spelling in a specific section only.

Note that the “Employee Information” section is not included by the spelling checker.

**To Check Your Spelling in a Form**

1 If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2 Do either of the following:
   • To check spelling for all the text you have entered on the entire form, click the Check Spelling icon at the top of the form.
   • To check the spelling for an individual text box, click the Check Spelling icon next to the text box.

3 If your organization uses multiple languages, click your language. If your organization uses only one language, go on to step 4.
4 Do either of the following:
   • If no spelling errors are found, go to step 7.
   • If a spelling error is found, go to the next step.

5 Do any of the following:

   To                                      Do this
   Manually correct the spelling error      In the Replace with box, type the correct spelling of the misspelled word, and then click Replace.
   Replace the misspelled word with one from the suggested list
   Replace all instances of the misspelled word with one from the suggested list
   Ignore the misspelled word               Click Ignore.
   Ignore all words with this spelling      Click Ignore All.
   Add the word to the dictionary          Click Learn.

6 Repeat step 5 to correct any additional spelling errors.

7 Click Close.

Checking for Inappropriate Language on a Form

The language checker checks the comments you have made in an appraisal for potentially offensive words and/or phrases, including such subjects as the following:

   • Age
   • Gender Orientation
   • Negative Connotations
   • Physical Attributes
   • Prejudice
   • Racism
   • Religious Overtones
   • Sexual Orientation

Note that the “Employee Identification” section is not examined by the language checker.
To Check for Inappropriate Language on a Form

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

2. Click the Check Language icon.

3. Do either of the following:
   - If no inappropriate words are found, go to step 6.
   - If an inappropriate word is found, go on to the next step.

4. Do any of the following:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manually replace a flagged word</td>
<td>In the Replace With box, type the replacement for the highlighted word, and then click Replace.</td>
</tr>
<tr>
<td>Replace the flagged word with one from the suggested list</td>
<td>In the Suggestion box, click the replacement word, and then click Replace.</td>
</tr>
<tr>
<td>Ignore the flagged word</td>
<td>Click Ignore.</td>
</tr>
</tbody>
</table>

5. Repeat step 4 for any additional flagged words.

6. Click Close.

Viewing Employee Records in a Split Screen on a Form

Using the split-screen, you can view the current form along with other employee records such as goals, development plans, journal notes, and so forth, for the same employee. For example, when rating an employee on a competency you might want to see your comments for the same competency on a past appraisal.

In addition to employee records for the current employee, you can also view in-progress or past appraisals/talent assessments for other employees in your chain of command in the split-screen.

Note: If you are a third party reviewer or 2nd level manager or above, you will not have access to the split screen view.

To View Employee Records in a Split Screen on a Form

1. If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.
2 Click the Split Screen icon ☐, and then do one of the following:
   • Under Employee Records, click the type of record (goals, development plans, and so forth) you want to view, and then, if necessary, click a record, and then click OK.
   • Under Other Employees, click the type of review you want to view, and then, if necessary, click a review, and then click OK.

The employee record appears below the form in a split-screen view.

Tip: If you are viewing journal notes, goals, or development plans in the split-screen view, you can add new records, show details, and so forth from the split-screen view.

**Hiding and Restoring a Succession Planning Section**

Succession Planning sections are created by default with section visibility rights set to not visible on employee’s self-appraisal, while the manager’s view will have visibility. If you wish to view the form with your direct report, you have the option to hide the Succession Planning section from their view.

HR representatives, the employee and second level managers may also have the ability to hide or restore Succession Planning sections if they have been granted section visibility rights.

**To Hide/Restore a Succession Planning Section**

1 If the form is not already open, from the My Tasks area, click the appropriate task, and then open the form for the appropriate employee.

   **Note:** An employee’s self-appraisal form will not display a Succession Planning section unless section rights have been granted.

2 On the Succession Planning section title bar, click the up arrow icon ☐ to hide the section.

   The Succession Planning section will be hidden from view and the Form Navigator navigation title will change to display Restore Section.

   **Tip:** If you have multiple employees in your list for which you must perform the same task, you can click Next Employee or Previous Employee to move to the next or previous available employee in your list.

3 To restore the view, locate the Restore Section title bar and click the down arrow icon ☐.

   To locate the title bar in a lengthy form, click Restore Section from the Form Navigator.

4 To produce a hard copy of the form, click the Print icon ☐.

   Both the printed and PDF versions of the manager form will include the Succession Planning section, regardless of whether the section has been hidden from view.

   **Note:** Sections with visibility rights set to be hidden from view will not appear on the electronically signed PDF version, when the electronic signature feature is enabled on the form.

**Adding Development Plans, Past Goals, and New Goals to**
**the Form**

While completing the form you may find that you want to add or copy a Development Plan, Past Goal, or New Goal to it. In addition, you can also copy and link a New Goal to an Organizational Goal.

**To Add a Development Plan, Past Goal, or New Goal to the Form**

1. If the form is not already open, from the **My Tasks** area, click the appropriate task, and then open the form for the appropriate employee.

2. Use the left navigator and click the link to the section you want to navigate to, or scroll down the form to the appropriate Development Plan, Past Goals, or New Goals section.
3 Do any of the following:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a Development Plan</td>
<td>In the Development Plan section, enter a title for the Development Plan, and then enter a description of it.</td>
</tr>
<tr>
<td>Add a Development Plan with a Competency Title</td>
<td>You may have the option to include a competency title. The list of competencies can come from any section on the form. The competency title is saved with the Development Plan. When licensed with the <em>eLearning Manager</em> module, there may be an option to “Add Learning” to the Development Plan. This will launch the <strong>Search</strong> page where you can search and select from available learning activities. When applicable the “Add Learning” button will pre-filter using the selected competency. The title of the selected learning appears on the form, and from the title link details can be viewed. For more information, see the <em>eLearning Manager</em> User Guide.</td>
</tr>
<tr>
<td>Add a Development Plan to a Competency section</td>
<td>You have the option to include a Development Plan to a Competency section or to a specific competency in the section. There is an option to include the due date with the Development Plan. A Development Plan that is added to a competency section may have a competency title selected from that competency section. A Development Plan added to a specific competency will automatically be associated with that competency title. When licensed with the <em>eLearning Manager</em> module, there may be an option to “Add Learning” to the Development Plan. This will launch the <strong>Search</strong> page where you can search and select from available learning activities. When applicable the “Add Learning” button will pre-filter using the selected competency. The title of the selected learning appears on the form, and from the title link details can be viewed. For more information, see the <em>eLearning Manager</em> User Guide.</td>
</tr>
<tr>
<td>Copy a Development Plan</td>
<td>In the Development Plan section, click the copy icon, then select a category from the <strong>Development Plan Category</strong>, then select the Development Plan, and then click <strong>Copy</strong>.</td>
</tr>
<tr>
<td>Add a Past Goal</td>
<td>In the Past Goals section, enter a title for the Past Goal, then enter a description of it, and then enter any remaining fields such as a start date, due date and so forth (if applicable).</td>
</tr>
<tr>
<td>To</td>
<td>Do this</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Copy a Past Goal</td>
<td>In the Past Goals section, click the copy icon, then select or clear the <strong>Include goal details when copying</strong> check box, and then do one of the following:</td>
</tr>
<tr>
<td></td>
<td>• Click the <strong>Individual</strong> radio button, select a goal, and then click <strong>Copy</strong>.</td>
</tr>
<tr>
<td></td>
<td>• Click the <strong>Process Defined</strong> radio button, select a process in the <strong>Process Name</strong> list, then select a Category from the <strong>Category</strong> list, select a goal, and then click <strong>Copy</strong>.</td>
</tr>
<tr>
<td>Add a New Goal</td>
<td>In the New Goals section, enter a title for the New Goal, then enter a description of it, and then enter any remaining fields such as a start date, due date and so forth (if applicable).</td>
</tr>
<tr>
<td>Link a New Goal</td>
<td>In the New Goals section, click the Link to organizational goal icon, then select a Category in the <strong>Category</strong> list, then select the check box next to the goal, and then click <strong>Link</strong>.</td>
</tr>
<tr>
<td><strong>Tip:</strong></td>
<td>Click the name of the goal to show the description for the goal.</td>
</tr>
<tr>
<td>Copy and Link a New Goal</td>
<td>In the New Goals section, click the Link to corporate goal icon, then select a Category in the <strong>Category</strong> list, then select the check box next to the goal, and then click <strong>Copy and Link</strong>.</td>
</tr>
<tr>
<td><strong>Tip:</strong></td>
<td>Click the name of the goal to show the description for the goal.</td>
</tr>
</tbody>
</table>

**Note:** Your administrator determines whether or not you can add additional Development Plans, Past Goals, and/or New Goals to the appraisal form. If you are allowed to add new Development Plans, Past Goals, and/or New Goals, you will see an “Add” link. Click this link to add a new Development Plan, Past Goal, and/or New Goal.

In addition, your administrator determines the minimum and maximum number of Past Goals, New Goals, and/or Development Plans to be included in the appraisal form.

4 (Optional) For New and Past Goals, if the score and weight columns are displayed in the appraisal form, enter a score and associated weight.

5 Click **Save**.

---

**Using Comment Helper and Coaching Tips**

The Suggested Comments helper provides you with suggested comments to help you complete the competency sections within the form by presenting a list of performance comments or coaching tips that you can use to complement your ratings. You can use these comments as they appear, or you can edit them to better suit your thoughts.
Each competency has categories, which allows you to choose comments about various skills related to that competency. For example, if the competency is “Taking disciplinary action”, the categories might be “Taking timely action” and “Taking fair and appropriate action”.

Coaching Tips can be used to provide meaningful comments to encourage employees.

**Note:** The Suggested Comments help is only available if activated by your administrator.

**To Use Comment Helper and Coaching Tips**

1. If the form is not already open, from the **My Tasks** area, click the appropriate task, and then open the form for the appropriate employee.

2. In the **Competencies** section of the form, click **Suggested Comments** below the competency you want to use comment helper for.

3. Do either of the following:
   - To add a performance comment, click the **Performance Comment** tab.
   - To add a coaching tip, click the **Coaching Tip** tab.

4. In the **Category** list, select a category.

5. In the **Employee's Gender** area, click either **Male** or **Female**.

6. In the **Comment Level** list, select a rating level.

7. (Optional for Performance Comments only), move the **Nuance** slider right to view suggested comments with a positive tone, or move it to the left for comments with a less positive tone.

8. Click **Add to Your Comment** to add the suggested comment to the **Your Comment** box. Text in the **Your Comment** box, will display on the form.

9. If required, edit the text in the **Your Comment** box to better suit your needs.
   - **Tip:** Click the eraser icon 🗑 to delete the comment.

10. Click **OK**.
Chapter 8

Task Status

Chapter Scope

This section describes the Task Status page. The Task Status page provides managers, HR representatives, project leaders and evaluators with a view into the tasks that involve themselves or their employees. You can view the details for an individual step in the process or you can view an overview of the tasks for all process steps. The task information can be further filtered and sorted.

The section topics are as follows:

- “About the Task Status Page” on page 66
- “Navigating Task Status” on page 66
- “Selecting a Process to View” on page 67
- “About the Task Status - Overview Display” on page 67
- “About the Task Status - Tasks Display” on page 68
- “Searching and Filtering the Task Status List” on page 68
- “Viewing Mini Status Reports” on page 69
About the Task Status Page

The Task Status page is available to the manager, HR representative, and/or process leader for a given process. The Task Status page is also available to employees that are responsible for evaluating another employee or reviewing a job description, if Halogen Job Description Builder is licensed.

From this page an Overview and a detailed Tasks display of the processes can be viewed. However, the Overview display is only available if you are a process manager or a project leader and have a manager relationship with an employee (a report) in the selected process. The Overview display is not applicable for job description processes.

You can complete tasks from the tasks list that is displayed for a specific process and when applicable you can view mini status reports.

For more information on what you can do from the Task Status page, see any of the following:

- “Navigating Task Status” on page 66
- “Selecting a Process to View” on page 67
- “About the Task Status - Overview Display” on page 67
- “About the Task Status - Tasks Display” on page 68
- “Searching and Filtering the Task Status List” on page 68
- “Viewing Mini Status Reports” on page 69

Navigating Task Status

You can access the Task Status page from the Home page with the top navigation bar, or by selecting a specific task from the My Tasks list. If you are involved in more than one process, begin by selecting a process from the Viewing list.

The Task Status page may display an overview of the tasks for all steps in the process and show the detailed tasks for a specific step in the process. Use the Tasks/Overview navigation bar beneath the page title to toggle the views. The Overview navigation option is only available if you are a process manager or project leader and have a manager relationship with and employee (a report) in the selected process. The Overview display is not applicable for job description processes.

You can search and filter the tasks by entering text in the search field or using the various filter options available by selecting Advanced Search. The resulting tasks can be further organized by selecting a column to sort on. If all of the rows and columns cannot be displayed within the page, vertical and horizontal scroll bars are provided. To select a row, click the check box in the first column.
When applicable, mini status reports are available to provide summary information about the status of a specific appraisal, talent assessment or job description in a process.

At the bottom of the Task Status page a legend displays the various task status icons that are available. The icons that appear next to a task indicate the status as follows:

<table>
<thead>
<tr>
<th>Status icon</th>
<th>What it means</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Overdue - tasks that are past due and require attention</td>
</tr>
<tr>
<td>![Icon]</td>
<td>My To-Do - tasks that need your attention but are not yet past due</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Their To-Do - tasks that require the attention of others but are not yet past due</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Sent for Review - tasks that are awaiting 3rd party review</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Not Ready - tasks that are not yet ready for your participation</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Completed - tasks have been completed and no longer require your attention</td>
</tr>
</tbody>
</table>

### Selecting a Process to View

The process selector displays a list of all the processes where you are responsible for evaluating another employee or reviewing a job description. The list displays the process names in ascending alphabetical order.

#### To Select a Process to View

1. From the Task Status page, select a process from the Viewing list.
   The information displayed will reflect the selection made.

   *Note: Selecting a task from the My Tasks list on the Home page also opens the Task Status page with the associated process display.*

### About the Task Status - Overview Display

The Overview display option is only available if you are a process manager or project leader and have a manager relationship with an employee (a report) in the selected process. The Overview display is not applicable for job description processes.

The Overview provides an overall status view of where each of your reports is in the selected process. From this view you can also drill down to look at different levels in the management hierarchy.
Use the cursor to hover over an item in the task status list to display an overlay that contains more information about the task. If a task is automatically completed, you are provided the reason for the completion in the overlay. Moving the cursor away closes the overlay.

**To View the Task Status - Overview Display**

1. From the Task Status page, click Overview on the navigation bar. The tasks for all steps of the selected process are displayed.
2. Click on an action such as Edit, Approve or View to perform your tasks.
3. To sort columns, click the column title. The arrow icon indicates the ascending or descending order of the display.

**About the Task Status - Tasks Display**

The Task display option is available if you are responsible for evaluating another employee or reviewing a job description, if Halogen Job Description Builder is licensed. A step navigation bar provides a graphical display of the steps in the process. Above each step in the navigation, the due date for the step is displayed. Steps that you have tasks to perform are clickable. For each clickable step you are given an indication of how many tasks require your attention, by the “To-Do” indicators below the step. Clicking on a step displays the details of the tasks for that step.

**To View the Task Status - Tasks Display**

1. From the Task Status page, click Tasks on the navigation bar. The tasks for the selected step are displayed.
2. Click on an action such as Edit, Approve or View to perform your tasks.
3. To sort columns, click the column title. The arrow icon indicates the ascending or descending order of the display.

**Searching and Filtering the Task Status List**

Managing large Task Status lists can be simplified by searching for specific items or using the various filtering options. Selecting the Overview or Tasks display, as well as the type of process determines which filter options are available in the Advanced Search panel.

The search and filtering options most recently used are remembered as you move in and out of the Task Status page. Your settings are saved when you log out of the application.

There are two methods that can be used to search and filter the Task Status List:
To Perform a Basic Search

1. From the Home page, click Task Status area.
2. Enter your search criteria in the Search box.
3. Click Search.
   The search results display in the list.
4. Click Show All.
   This clears the search criteria and displays the default list.

To Perform an Advanced Search

1. From the Task Status page, click Advanced Search.
   The plus/minus icons indicate if the Advanced Search panel is collapsed or expanded.
2. In the Show task with these statuses area, select from the available check boxes.
   You can select all or none of the check boxes.
3. When available, select the Filter by check box and select from the available list(s).
4. To filter by date, select the Date check box(es) and select from the list(s) and calendar(s).
   When a task has no due date then N/A displays in the column.
5. When available, click Direct Reports or All Reports.
   • Direct Reports is the default option, and includes any employees and/or managers with a process manager relationship to you.
   • All Reports includes all levels of your process manager hierarchy.
   Note: The relationship toggle is available when the Overview display has been selected.
6. Click Search.
   The list displays with your selected filter options.

Viewing Mini Status Reports

Mini status reports provide you with summary information about the status of specific appraisal, talent assessment or job description in the process step order sequence.
There are two mini status reports available from the Task Status area as follows:

• The mini status report for an Appraisal or Talent Assessment process displays the step name, status, due date and the person responsible for each step in the process for the
selected employee. The View Status link only displays in the employee row if you are in the process management hierarchy for that employee.

- The mini status report for a Job Description process displays the step name, status, due date and the completed date for each step in the process for the selected job description. This mini report is available only if *Halogen Job Description Builder* is licensed.

**To View a Mini Status Report**

1. Click **View Status** in the **Status** column of the tasks list.
   The mini status reports are read only.

2. Review the information and click **Close**.
   You can also click the “X” to close.
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