Completing a Self-Appraisal

Steps for completing the Self-Appraisal in Halogen:

- Update your goals
- Rate each goal with comments
- Select your overall goal rating with comments
- Rate each competency with comments
- Select your overall competency rating with comments
- Select your overall performance appraisal rating with any final comments

IMPORTANT:

- Update each of your goals BEFORE opening the self-appraisal. This is extremely important because if you save your appraisal form, you are NO LONGER ABLE to edit your goals!
- Click the SAVE button often. Halogen does not automatically save.
- Log in to Halogen. On the UCOP Performance Management page, click the Halogen Log-In quick link and enter your UCOP Username and Password on the next screen.

Direct link to Halogen: https://global.hgncloud.com /regents_uni_california/welc ome.jsp

 Once you log in, the Tasks section is displayed on the Halogen home page. Your self-appraisal form will appear here when it is ready for completion.

REMEMBER: Update your Goals individually BEFORE opening the appraisal page.

Learning & development Performance Management is a continual process of setting expectations, creating and managing SMART goals and assessing progress. UCOP is committed to a Performance Management Process to ensure that an employees are meeting individual goals and overall department performance objectives. Compensation <th>TO OR GARLER</th> <th>Performance Appraisal Process</th> <th></th>	TO OR GARLER	Performance Appraisal Process	
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- When you first open the form, check that it is the correct form for your position. The form will be labeled as Non-Supervisory Employees or Managers and Supervisors.
- 4. Check that the Manager Name field is correct.
- If either of these items are incorrect on your form in Halogen, close the form immediately (do not save) and email <u>eappraisal@ucop.edu</u> to have it corrected.

Indicates required field UNIVERSITY OF CALIFORNIA						
Regents of the University of California Office of the President						
2017/2018 Performance Appraisa - Non-Supervisory Employees						
Name:		Manager Name:				
Job Title:		Hire Date:				
Division:		Department:				
Last Appraisal Date:						
Appraisal Period:	April 1, 2017 through March 31, 2	2018				

*Indicates required field UNIVERSITY OF CALIFORNIA Regents of the University of California Office of the President 2017/2018 Performance Appraisa - Managers and Supervisors Name: Job Title:

Department:

Division:

Appraisal Period: April 1, 2017 through March 31, 2018

Last Appraisal Date:

Your goals will be pulled into your self-appraisal form.

For each goal:

- 6. Select a Rating.
- 7. Add Comments to support your selected rating.

Note: Click the Save button often. Halogen does not automatically save.

Current Goa	als			
	Goals		Comments:	
Title:	Test Goal Title Goes Here			
(i) (i)	Test Goal Description Goes here		Add Comment here	
	Due:		Completed:	
	L		Stat	tus:
Comments: [John F Blake on 10/9/16] This is a not John F Blake on 10/9/16] This is anoth	e ier note		
Rating:	Outstanding Exceeds Expectations Successfully Meets Expectations Development Needed/New and Learr Does Not Meet Expectations Deleted Goal/Goal not from current ye	ning ar		
Attach F Add Past	eedback Goal			ABÇ 🗳

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- If a Goal was cancelled or deleted and is pulled into your self-appraisal, select
 Deleted Goal/Goal not from current year as the Rating and add explanatory comments.
- If a goal does not appear, click the Add Past Goal button.

🚱 Add Past Goal

10. A new window will open. Click the copy button.



- 8. Choose the missing goal from the list.
- 9. Click OK.
- 10. Add comments.
- **11.** Select a **Rating** for the goal and repeat as needed.

Rating:	\bigcirc	Outstanding
	\bigcirc	Exceeds Expectations
	\bigcirc	Successfully Meets Expectations
	\bigcirc	Development Needed/New and Learning
	\bigcirc	Does Not Meet Expectations
	\bigcirc	Deleted Goal/Goal not from current year

Title:		
	Due: E Completed:	
	Status:	
Rating: (((((((Outstanding Exceeds Expectations Successfully Meets Expectations Development Needed/New and Learning Does Not Meet Expectations Deleted Goal/Goal not from current year Eachack	
Attach	Feedback	-
🜮 Add Past	it Goal AE	۶ ₽

Process:	FY 2013/2014 OP Performance Appraisal
Category:	All
Ŀ	✓ Include goal description when copying
[✓ Include comments
Goal:	(Completed)Develop and Deliver Supervisor Certification Pilot (Completed)Efficiency Review Group (Completed)MDP Trainer Certifications (Completed)Revamp and Deliver Update Supervisor Certification (In Progress)Participate in all L&D Programs at UCOP
	Test Goal Title Goes Here

- 12. Select an Overall Rating for Goals.
- **13.** Add **Comments** to support your selected rating.

Comments: (maximum text 6 rows) Add your comments here (maximum text 6 rows) Outstanding Exceeds Expectations Successfully Meets Expectations Development Needed/New and Learning Does Not Meet Expectations	Overall Rating for Goals		
each SMARI goal. Provide additional comments to support your selected rating. (maximum text 6 rows) Comments: (maximum text 6 rows) Add your comments here (maximum text 6 rows) Add your comments here	individual ratings that you have selected for	O Outstanding	
(maximum text 6 rows) Successfully Meets Expectations Development Needed/New and Learning Does Not Meet Expectations Add your comments here (maximum text 6 rows)	each SMART goal. Provide additional comments to support your selected rating.	O Exceeds Expectations	
Comments: (maximum text 6 rows) Add your comments here	(maximum text 6 rows)	Successfully Meets Expectations	
O Does Not Meet Expectations		 Development Needed/New and Learning 	
Comments: Add your comments here (maximum text 6 rows)		O Does Not Meet Expectations	
	Comments: (maximum text 6 rows)		

- **14.** Select a **Rating** for each competency.
- 15. In the Comments, provide short, detailed examples of your work and accomplishments that exemplify each competency.

Note: Click the Save button often. Halogen does not automatically save.

- 16. Select an Overall Rating for Competencies.
- **17.** Add **Comments** to support your selected rating.
 - Note: Click the Save button often. Halogen does not automatically save.

Instructions for Rating Competencies				
To rate each competency, provide short detailed examples of how you used that particular competency to achieve your goals and/or to perform your daily job responsibilities, and select a rating that best represents how you have demonstrated that particular competency. 20 characters minimum, 6 lines maximum				
Collaboration and Communication Builds partnerships and works collaboratively with others to meet				
shared objectives.	0	Outstanding		
click on Competency title for more details	0	Exceeds Expecations		
	۲	Successfully Meets Expecations		
	0	Development Needed/New and Learning		
	0	Does Not Meet Expectations		
*Comments: (20) (20) (20) (20) (20) (20) (20) (20)				
Attach Feedback			ABÇ	ľ

Select an overall Competency rating based on		
each of the individual competency ratings that	O Outstanding	
comments to support your selected rating.	O Exceeds Expectations	
maximum text, 6 rows	 Successfully Meets Expectations 	
	O Development Needed/New and Learning	
	O Does Not Meet Expectations	
Comments: (6 lines maximum)		

 Select an Overall Performance Appraisal Rating. Add any final Comments to 	Overall Performance Appraisal Rating Overall Performance Rating Select an overall appraisal rating (which is a combination of the overall goal rating and O Outstanding	
support your self-appraisal.	overall competency rating), Provide additional comments to support your selected rating. Exceeds Expectations maximum text, 6 rows Successfully Meets Expectations Select Complete and Submit to complete form. Development Needed/New and Learning Does Not Meet Job Expectations Comments: (maximum text 6 rows) ************************************	₩¢ 🗳
20. Click to Save your work in progress.	Save Complete and Submit	
21. Click Complete and Submit to send the form to your manager.		

For more resources including videos, job aids and sample forms, please visit the **UCOP Performance Management** Learning Resources page at <u>https://www.ucop.edu/local-human-resources/your-career/performance-management/Learning-resources.html</u>.