

## 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.

1. 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/welcome.jsp](https://global.hgncloud.com/regents_uni_california/welcome.jsp)

2. 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.**

- 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**.
- 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 [eappraisal@ucop.edu](mailto:eappraisal@ucop.edu) to have it corrected.

\*Indicates required field

**UNIVERSITY OF CALIFORNIA**

Regents of the University of California Office of the President

2017/2018 Performance Appraisal - **Non-Supervisory Employees**

Name:  Manager Name:

Job Title:  Hire Date:

Division:  Department:

Last Appraisal Date:

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

\*Indicates required field

**UNIVERSITY OF CALIFORNIA**

Regents of the University of California Office of the President

2017/2018 Performance Appraisal - **Managers and Supervisors**

Name:  Manager Name:

Job Title:  Hire Date:

Division:  Department:

Last Appraisal Date:

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

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

For each goal:

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

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

**Current Goals**

Goals	Comments:
<p>Title: <input type="text" value="Test Goal Title Goes Here"/></p> <p><input type="text" value="Test Goal Description Goes here"/></p> <p>Due: <input type="text"/></p>	<p><input type="text" value="Add Comment here"/></p> <p>Completed: <input type="text"/></p> <p>Status: <input type="text"/></p>
<p>Comments: [John F Blake on 10/9/16] This is a note [John F Blake on 10/9/16] This is another note</p>	
<p>Rating: <input type="radio"/> Outstanding  <input type="radio"/> Exceeds Expectations  <input checked="" type="radio"/> Successfully Meets Expectations  <input type="radio"/> Development Needed/New and Learning  <input type="radio"/> Does Not Meet Expectations  <input type="radio"/> Deleted Goal/Goal not from current year</p>	

Attach Feedback    Add Past Goal    ABC

8. 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.

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

9. If a goal does not appear, click the **Add Past Goal** button.



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



Title:

Due:

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

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.

Process: FY 2013/2014 OP Performance Appraisal

Category: All

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  
(In Progress)Presentation Skills Class  
Test Goal Title Goes Here

12. Select an **Overall Rating for Goals**.

13. Add **Comments** to support your selected rating.

**Overall Rating for Goals**

Overall Rating for Goals  
Select an overall Goal rating based on the individual ratings that you have selected for each SMART goal. Provide additional comments to support your selected rating. (maximum text 6 rows)

Outstanding  
 Exceeds Expectations  
 Successfully Meets Expectations  
 Development Needed/New and Learning  
 Does Not Meet Expectations

Comments: (maximum text 6 rows) Add your comments here

Attach Feedback

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  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.  
*click on Competency title for more details*

Outstanding  
 Exceeds Expectations  
 Successfully Meets Expectations  
 Development Needed/New and Learning  
 Does Not Meet Expectations

\* Comments: (20 characters minimum, 6 lines maximum) Keeps director and staff up to date with calendars, events and relevant information. Maintains relationships with department stakeholders; keeps them apprised of relevant information. Responds promptly to email and voicemail; researches needed information when necessary. Works with director and staff to understand their needs and look for ways to be supportive. Collaborates with other admins to align schedules, combine events and reduce unneeded meetings.

Attach Feedback

16. Select an **Overall Rating for Competencies**.

17. Add **Comments** to support your selected rating.

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

**Overall Rating for Competencies**

Overall Rating for Competencies  
Select an overall Competency rating based on each of the individual competency ratings that you have selected. Provide additional comments to support your selected rating. maximum text, 6 rows

Outstanding  
 Exceeds Expectations  
 Successfully Meets Expectations  
 Development Needed/New and Learning  
 Does Not Meet Expectations

Comments: (6 lines maximum)

Attach Feedback

18. Select an **Overall Performance Appraisal Rating**.

19. Add any final **Comments** to support your self-appraisal.

The screenshot shows a web form titled "Overall Performance Appraisal Rating". It contains a section for selecting a rating with five radio button options: Outstanding, Exceeds Expectations, Successfully Meets Expectations, Development Needed/New and Learning, and Does Not Meet Job Expectations. Below this is a text area for "Comments: (maximum text 6 rows)". At the bottom left is an "Attach Feedback" button with a speech bubble icon, and at the bottom right is a small "ABC" icon with a plus sign.

20. Click to **Save** your work in progress.

Two rectangular buttons are shown side-by-side: "Save" on the left and "Complete and Submit" on the right.

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 <https://www.ucop.edu/local-human-resources/your-career/performance-management/Learning-resources.html>.