

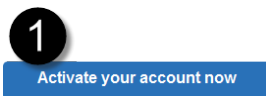


## Getting Started

### 1 Activating Your Account

You may be required to activate your account. An email will be sent to you with an activation link. Or, you can use Internet Explorer to go directly to the site: <https://global.hgncloud.com/hollyspringsnc/welcome.html>.

Click the **Activate your account now** button in the activation email you received to access the Account Settings page and activate your account.



From the Account Settings page you will change your password and set your Security Questions.

Once you have completed the account activation you will be automatically logged into Halogen Performance.

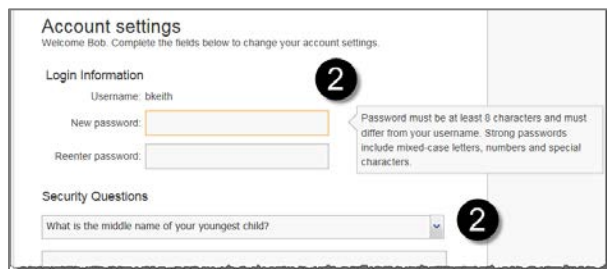
### 2 New Password and Security Question Requirements

When you change your password, the new password must contain:

- One or more letters (a-z, A-Z),
- Both upper and lower case letters,
- One or more numbers (0-9), and
- Minimum of 8 characters

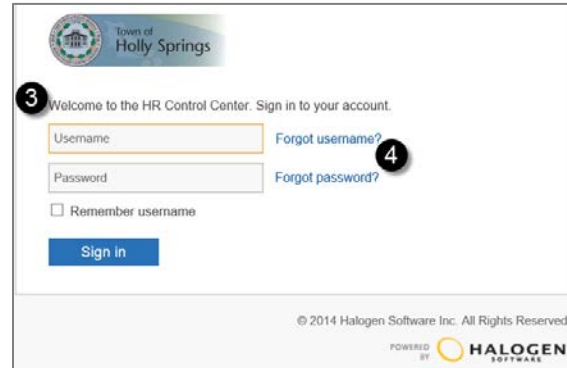
Your security question requirements include:

- Security questions and answers must be unique.
- Security answers must be a minimum of 4 characters.



### 3 Logging In

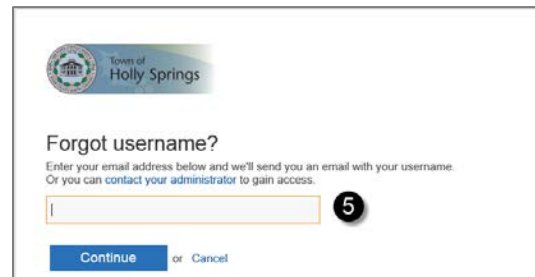
To log into the Performance system, type your Username and Password then click **Sign in** to be directed to your Home page.



### Forgotten Login Information

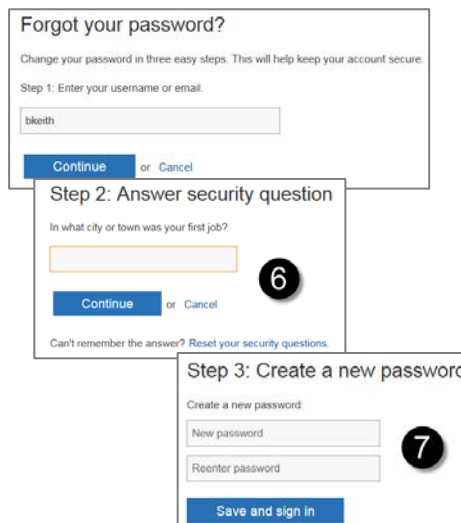
4 If you forget your username or password, you can retrieve your information by clicking the **Forgot username?** or **Forgot password?** link beside the login screen.

5 **Forgot username?**, enter your email address and click Continue. You will then receive an email with your Username.



6 **Forgot Password?**, enter your username, click **Continue** and answer the Security Question.

7 Enter and re-enter a **New Password**. Click the **Save and sign in** button. Your password will be changed and you will be signed into the system.





## Navigating the Home Page

When you login you will always be directed to your Home page. The Home page displays all of the features available to you, and it shows the tasks that you need to perform. The Home page has four main areas:

### 8 Navigation Bar

The Navigation Bar displays all the different sections that you can access. Your current location will always display in blue. In some sections, a secondary Navigation Bar will display with additional areas to view and manage information. Use the navigation bars to move around, instead of using your browser's **Back** button. This will reduce your chances of losing unsaved information.

### 9 My Tasks

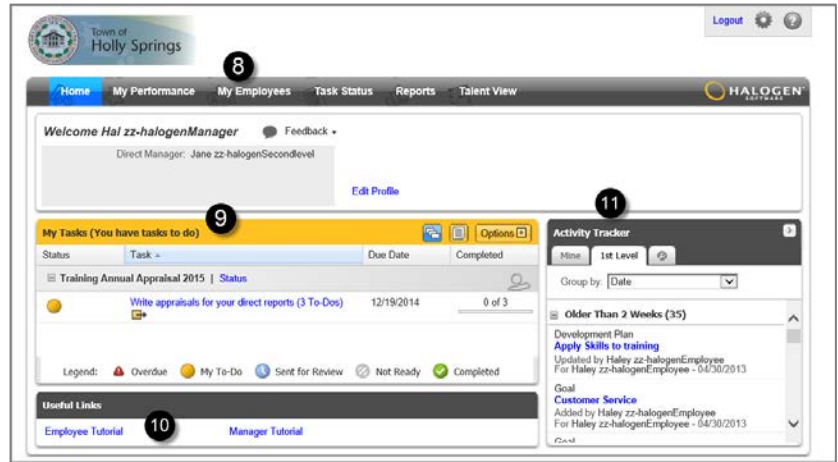
The My Tasks area displays an overview of tasks assigned to you. Tasks auto-populate when a previous task in the process is completed. Click the **Options** button to filter what displays in the My Task area.

### 10 Useful Links

At the bottom of the Home page you can click these links to be directed to additional resources and user-guides.

### 11 Activity Tracker

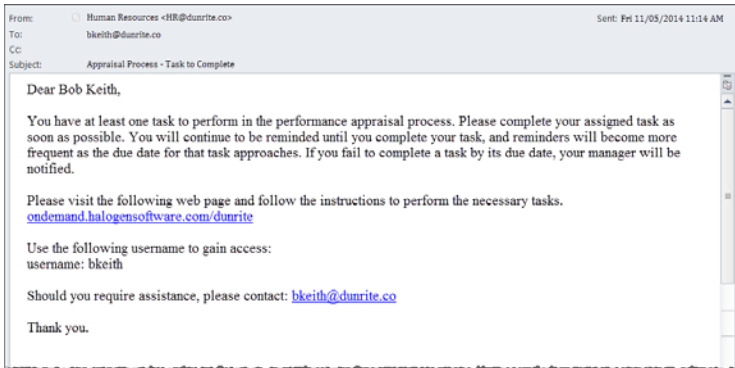
The Activity Tracker provides you with a quick way to view changes to your goals, development plans, feedback, and more. As a manager, you can also click on the 1st Level tab to see the activities of your direct reports. If you have more than one level of employees reporting to you, you will see additional tabs.



## Completing a Task

### Notification Email

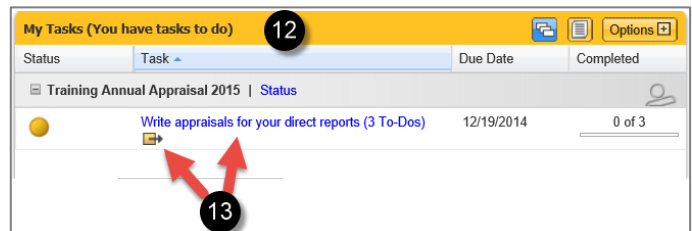
Whenever you have a task to complete, you'll receive a notification email from Halogen Performance telling you to open the module and complete your task.



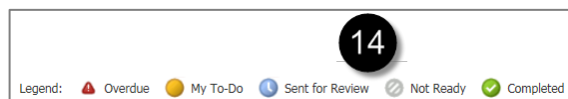
### Opening Tasks and Status Icons

12 When you log in to Halogen Performance, you will see your Home page. On your Home page, the My Tasks area displays an overview of tasks assigned to you.

13 To open a task, click the name to access the task. If a **Quick Selector** (📄➔) displays, click the icon, then select the link for the task that you wish to complete.



14 You will also see status icons associated with the tasks, and a legend outlining the meaning of each one.

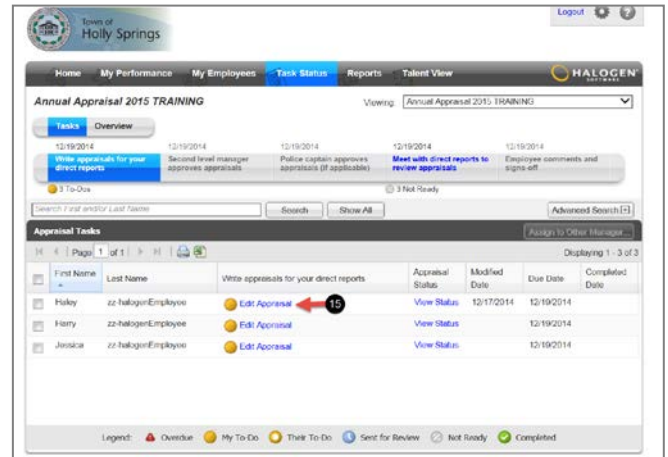




## Task Status Options (for Managers)

### 15 Opening the Appraisal Form

Click **Edit Appraisal** next to the employee's name.



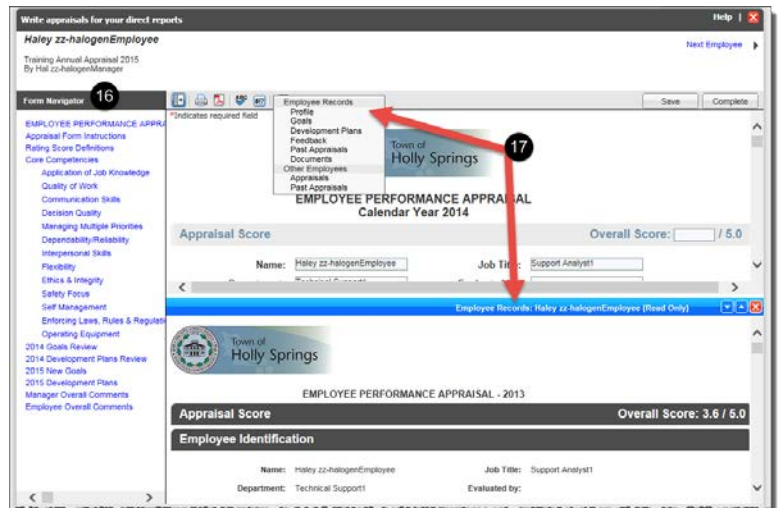
## Working with an Appraisal Form

### 16 Viewing a Specific Section in the Form

Click the links in the **Form Navigator** to the left of the open appraisal form to jump to any section.

### 17 Split-screen

1. Click the **Split-screen** icon (☰) at the top of the form.
2. Select the item that you want to display.
3. The split screen window will open at the bottom of the form. Copy and paste or drag and drop information directly into the appraisal form if desired.
4. Click the red X to close the split screen.



## Saving vs. Completing the Form

- Click the **Save** button (Save) at the top of the form if you want to save a draft and return later to add additional content. The system will save your progress if you leave it open and do not touch it after 15 minutes.
- Click the **Complete** button (Complete) when you are finished working on the appraisal and are ready to move on to the next step of the process.

## Printing the Form

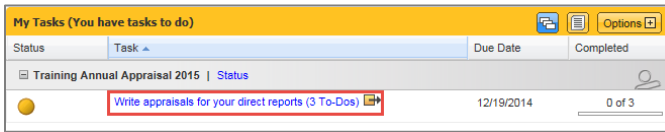
1. Click the **Print** icon (🖨️) at the top of the form.
2. Select **Normal Print** or **Condensed Print**. **Normal Print** will print the form as it is shown on your screen, while **Condensed Print** will print a shorter, condensed version of the form.
3. To keep sections together on a page, deselect **Allow Sections** to break across pages.
4. Click **OK** when finished. The appraisal form will appear in a new browser window.
5. Print the appraisal form using your browser's function.



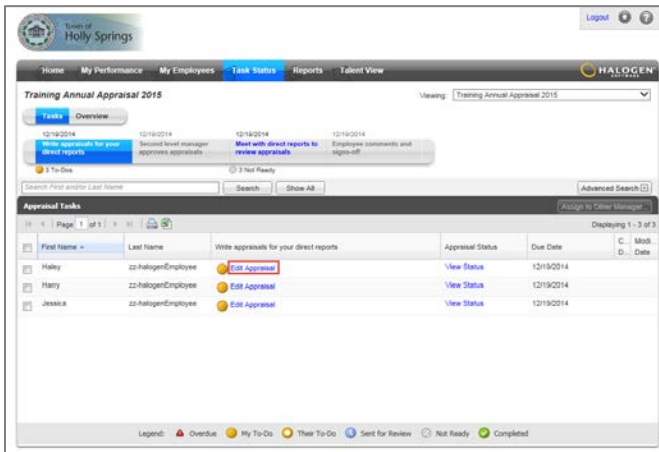
## Process Tasks

### Manager writes employee appraisals

1. Click the **Write appraisals for your direct reports** link in the My Tasks area of your Home page.

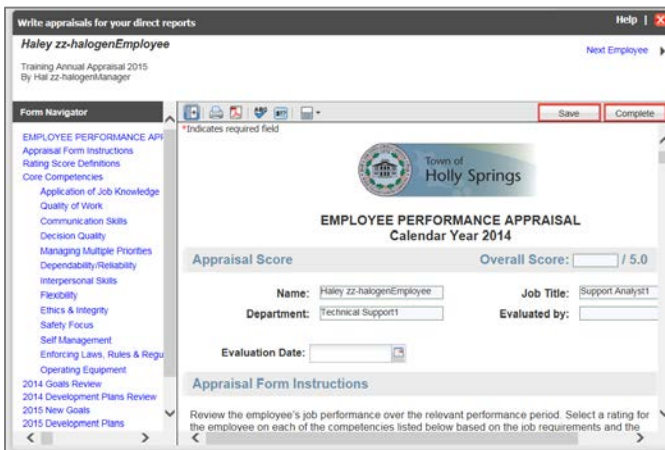


2. This opens the Task Status area. Click the **Edit Appraisal** link next to the employee's name to open the form.

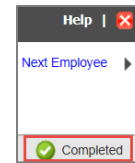


3. Complete all fields as required.
4. Click the **Save** button to save the form and return to it later.
5. Click the **Complete** button to complete the task and to send the form to the next step in the process.

Note: that once the **Complete** button is selected, no further changes may be made to the appraisal form.



Once complete, the form will be shown as completed on the top right of the screen, as well as on your Home page.

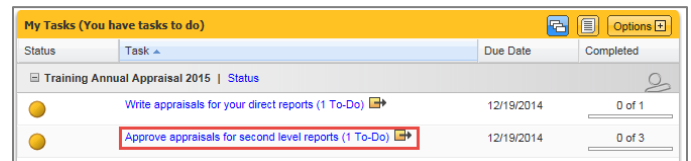


Also, the Second level manager will be notified that the form is ready to be reviewed.

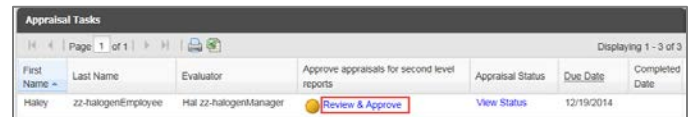
The appraisal status will be under approval until all approval levels are finished. You can view the appraisal status by clicking on the **View Status** link.

### Second level manager approves appraisals

1. Click the **Approve appraisals for second level reports** link in the My Tasks area of your Home page.



2. Click the **Review & Approve** link next to the employee's name to open the form.



3. Review the appraisals written for your second level reports. You can save, approve the appraisals, or send them back to the managers with annotations.
4. Click **Save** to save the form and return to it later.
5. The Second level manager can add annotations by clicking on the annotation icon ( ). The Second level manager clicks **Send Back to Author** to redirect the appraisal back to the manager.
6. Click **Approve** to send the form to the next step in the process.

Note: that once the Approve button has been selected, no further changes may be made to the form.



## Manager meets with employee & signs off appraisal

1. Click the **Meet with direct reports to review appraisals** link in the My Tasks area of your Home page.
2. This opens the Task Status area. Click the **View Appraisal** link next to the employee's name to open the form.

First Name	Last Name	Meet with direct reports to review appraisals	Appraisal Status	Due Date	Completed Date
Haley	zz-halogenEmployee	<a href="#">View Appraisal</a>	View Status	12/19/2014	
Harry	zz-halogenEmployee	<a href="#">View Appraisal</a>	View Status	12/19/2014	

3. Meet with your direct reports to review and discuss their appraisals.
4. When ready, click the **Mark as Completed** button.

Once marked as complete, the form will be shown as completed on the top right of the screen, as well as on your Home page.

## Employee comments and signs-off

1. The employee clicks the **Add final comments and sign-off your appraisal** link in the My Tasks area of their Home page.

Status	Task	Due Date
	<a href="#">Add final comments and sign-off your appraisal</a>	12/19/2014

2. This opens the form. The employee will review the appraisal and add any final comments.
3. The employee clicks the **Sign Off** button () at the top of the form. Sign-off of the appraisal indicates that the employee has reviewed the appraisal.
4. The employee enters their Halogen Password in the pop-up window, and then clicks **OK**.

The pdf copy of the form will show as being completed on the top right of the screen, as well as on the employee's Home page.

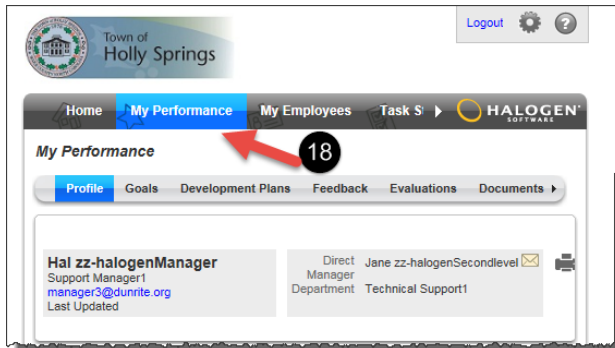
To view the signed off appraisal form, the employee clicks on the My Performance tab and, under the Evaluations tab, clicks the **Annual Appraisal** link to open a pdf copy of the form.

Past Appraisal	Project	Evaluator	Date	Self Evaluation
<a href="#">Training Annual Appraisal 2015</a>		Hal zz-halogenMana...	12/16/2014	

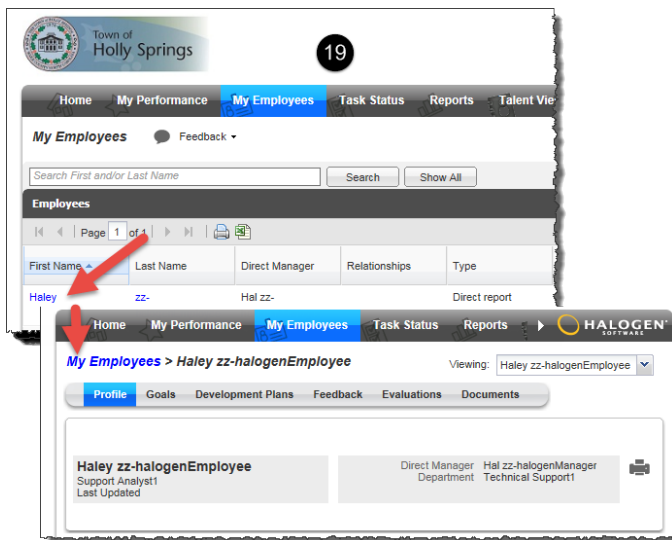


## Interim Review & Ongoing Coaching (Performance Management)

**18** To access your own performance, select a performance area from your My Performance area from the second navigation bar.



**19** To access your employees' performance, select an employee's name in your My Employee area, and select a performance area from the second navigation bar.



### Feedback and Notes

Feedback provides options to share information. Recognition is an acknowledgement of an achievement or a positive acclaim of performance that can be written by anyone.

A Journal Note is a statement or comment written by the employee. A Manager Note is a statement or comment about an employee written by management.

You can add notes throughout the year and access them during your writing of the appraisal process.

### To add new feedback or notes:

1. From the Feedback tab, click the **Add** button.
2. Make your selection.
3. Enter the recipient(s), as well as a title and description. Select the checkbox to make the journal note viewable by either the manager or by the employee.
4. Click **OK** when finished.

### To modify an existing Journal Note:

1. Click the title link of the note.
2. Modify as necessary.
3. Click **OK** when finished

### Goals

#### To add a new goal:

1. From the Goals tab, click the **Add** button.
2. Enter a title and description.
3. Add a **Start** and/or **Due** date as necessary.
4. Click **OK** when finished.

#### To modify an existing goal:

1. Click the title link of the goal.
2. Modify the fields as necessary.
3. Click **OK** when finished.

#### To update the status of a goal:

1. Click the title link of the goal.
2. Update the Status, Percent Complete and/or Progress Flag.
3. Click **OK** when finished.

### Development Plan

#### To add a new development plan:

1. From the Development Plans tab, click the **Add** button.
2. Enter a title and description.
3. Add a **Start** and/or **Due** date as necessary.
4. Click **OK** when finished.

#### To modify an existing development plan:

1. Click the title link of the development plan.
2. Modify the fields as necessary.
3. Click **OK** when finished.

#### To update the status of a development plan:

1. Click the title link of the development plan.
2. Update the **Status** using the dropdown list.
3. Click **OK** when finished.

### Secondary Managers (for Managers)

#### To add a Secondary Manager:

1. Click the **Add** button.
2. Use the search fields, select the other manager, and click the **Add** button.
3. Click **OK** when finished.
4. Click Secondary Manager's **first or last name**.
5. Select sections to grant access to by checking and unchecking the boxes beside the performance sections.
6. Click **OK** when finished.

Note: This assignment does not give the additional manager access during an assessment process; it allows additional managers to be able to add, edit and manage items in an employee's performance pages.