Reference Guide for Employees: Halogen eAppraisal™

Purpose of the Evaluation Process:

eAppraisal was designed for managers to evaluate employee performance and achievement for the past year, as well as to set performance objectives and development plans for the coming year. Managers use employee self-evaluations as a guide when completing employee evaluations. This information will be tracked, and your management hierarchy will be able to see how performance relates to the organization’s overall success. The evaluation process will help you:

• Capture a helpful snapshot of your strengths and improvement opportunities.
• Get objective feedback on past performance that you may use to improve performance going forward.
• Discuss training and development plans to foster growth and help you in your career advancement.
• Define an outline of the goals that you are expected to achieve in the coming year.
## Evaluation Process - High Level View

**High Level View:**

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Due Dates</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Writes Self-Appraisal</td>
<td>Employee</td>
<td>06/30/2013</td>
<td>This is a chance for employees to provide input to their Performance Evaluation.</td>
</tr>
<tr>
<td>Manager Writes Employee Appraisals</td>
<td>Manager</td>
<td>06/30/2013</td>
<td>Manager completes evaluations for their employees with input from the employees’ Self Evaluation.</td>
</tr>
<tr>
<td>Manager Meets with the Employee</td>
<td>Manager, Employee</td>
<td>08/31/2013</td>
<td>Manager meets with his/her employees to discuss their Performance Evaluation and add their final comments.</td>
</tr>
<tr>
<td>Employee Signs-Off</td>
<td>Employee</td>
<td>09/30/2013</td>
<td>Employee provides signs-off on the evaluation.</td>
</tr>
<tr>
<td>Manager Signs-Off</td>
<td>Manager</td>
<td>09/30/2013</td>
<td>Manager signs-off on the evaluation.</td>
</tr>
</tbody>
</table>
Logging In:

1. You will receive an email notifying you that you have a task to complete. This email will contain the web address to visit as well as your username. Click the web address to launch eAppraisal in your browser.

![Email with Password and Link](image1)

2. Enter your Username and Password. The first time you log in you will be asked to make a new password and create three security questions. Click on **Forgot your Username** or **Forgot Password** links if required.

![Sign in Screen](image2)
Evaluation Process - Detailed Instructions:

Step 1: Employee Writes Self-Appraisal:

1. Select the *Write your Self-Appraisal* task on your home page.

   ![Employee writes self appraisal and goals](image)

2. Document your accomplishments and performance for the year using the self-evaluation form. Assess yourself for each competency. A Performance Assessment Definition section is included that details the different assessment levels.

   ![Performance Assessment Definitions](image)
You may add feedback directly into your review from your Feedback tab of your Performance Area. Simply click the Attach Feedback link at the bottom of a competency. A pop-up window opens listing all feedback you have received. Select the one(s) you would like to include by checking the box and then clicking the Attach button. It will appear directly under the competency. You may erase it by clicking the small X on the right hand side.

Attaching Feedback to the Form

3. Be sure to complete all applicable sections of your appraisal form, including the comments section.

4. Click Save to save your work and return to it later. Click Completed when you are finished and ready to submit your self-appraisal to your manager. To navigate from the appraisal form back to your Home page, use the Red X. Using the Back Button on the navigation bar may result in loss of information.
Save and Complete the Self-Evaluation

**Step 2: Manager Writes Appraisal** – Your manager will complete your performance evaluation using input from your self-appraisal form.

**Step 3: Manager Meets with Employee** – Your manager will meet with you to discuss the contents of the appraisal with you.

**Step 4: Employee Signs-Off**
Once your manager has completed your evaluation and met with you to discuss the contents, you will be required to sign off on your performance review. When you have been assigned this task, a link will display on your Home Page and you will receive an email notification.
To sign off your appraisal process:

1. Click the *Sign off* button at the top of your form to complete the evaluation and enter your eAppraisal password.

2. You may print your form in PDF simply by clicking on the icon.

3. You can also find your performance appraisal in your *Appraisal section* under *My Performance* once all steps are completed.

4. In addition, goals from this process will now appear in your *Goal section* under *My Performance* once all steps are completed.

**Step 5: Manager Signs-Off** - After you have signed off, the evaluation will be sent to your manager for their final sign-off. Once your manager signs off on your evaluation, the process is complete.
Frequently Asked Questions:

How will I know if I have a task to complete?
You will receive an email that is automatically generated by the system notifying you that you have at least one task to complete. This email will include the web address to visit in order to access your appraisal process. Once you log into the system you will find any tasks that have been assigned to you on your home page.

How do I start a task?
To start a task, click the title of the step name to open the task.

What do the icons next to my tasks mean?
The icons that appear next to your tasks indicate the status of your task:

- Tasks that need your attention but are not yet past due
- Tasks that are past due and should be prioritized
- Tasks that have been completed and no longer require your attention
- Tasks that are being reviewed
Tasks that are not ready for you to complete

Why is my task overdue when I just got it?
It is possible that you may have a task that is overdue even though you just received it. This can occur when the process has been held up prior to your task being assigned. For example, your manager was away on vacation during the goal setting process and when they returned they are already late to complete their tasks. Once they are done and it moves to you, you might already be late for your next step.

In this case simply complete the task as soon as possible.

What do I do if I need help?
You can use the *Question Mark* button in the Upper right hand corner of your screen while you are working within eAppraisal. eAppraisal contains a thorough online help system. You can access online help for the eAppraisal application at any time by clicking the *Online Help* link. This link will always be located in the Upper right hand corner of your screen while you are working within eAppraisal. If you still can’t solve your problem after using the help files, select the *Contact Us* link to email your process administrator with your question.
How do I save my work so far so that I can complete it later?
If you need to stop working prior to completing the goal setting form select Save button to save your work thus far. You will be able to return later to complete the form by selecting the associated step on your home page. When writing an appraisal you should only select the Complete button once you have finished working on the form.

What do I do if I hit “Complete” by mistake before I have finished writing my appraisal?
If you select the Complete button before you are finished working on an evaluation you should contact your evaluation process administrator immediately. You can contact the administrator by selecting the Contact Us link in the upper right hand corner of your screen. Your administrator will be able to reset the status of the form so that you can access and complete it.

How can I view the Status of my Appraisal?
Available on the Home page, the Process Status report allows you to see your status in a selected Appraisal process. Viewing this report shows you all of the steps in the process, the status of each step, the completion date, and the person responsible for each step.
To View the Status of Your Appraisal Process:

1. From the Home page, in the My Tasks area, select the *Status* link next to the Process title

![Launching the Process Status Report](image)

An Individual Status report window appears displaying the process steps, their Due Dates and the Person Responsible:

![The Process Status Report](image)

Where can I view my Performance Evaluation?

Once you have completed an evaluation in the eAppraisal system you can access your past appraisal within the *My Performance* area. Your performance evaluation appears in this section once it’s finalized. Select *Evaluations* to display a list of all your Performance appraisals that have been completed within eAppraisal. Select the Appraisal title to view the completed appraisal. You may view an associated self evaluation by selecting the *View* link in the Self Evaluation column.
How do I change my password and security questions?

You can change your security settings at any time by clicking the Gear icon and **Security Settings**. You will have the option to **Change Password** or **Security Questions**. For security reasons you will be required to change your password the first time you login to the eAppraisal system.

To change your password:

1. Click Change Password.
2. Enter your Current Password.
3. Enter your New Password.
4. Re-enter your New Password in the Confirm Password field.
5. Click the **OK**.
To change your security questions:
1. Click Security Questions.
2. Select and answer the three questions.
3. Click the OK.

How do I use the Feedback area?

*Feedback* allows you, your manager, and HR Representative to track your accomplishments throughout the year so that they can be highlighted during future appraisal processes. Feedback, such as Journal Notes, Manager Notes, Award and Recognition are kept in the *Feedback* area.

When adding feedback, employees have the option of keeping it private or allowing their manager to access the note. Managers can also add notes to their direct report’s Feedback area.

Additionally by choosing to share the note with management an employee can effectively keep their manager updated on their most recent accomplishments. This section should be visited and added to whenever the employee has an achievement that they would like to keep track of.
To Add a New Feedback Note:

1. Click Feedback from your homepage and select the type of feedback you would like to add
2. In the *My Performance* area, click *Feedback*
3. Click the *Add* button
4. Select the type of feedback to add
5. Enter a title for the note
6. Enter the details of the note
7. If you want to allow your manager to view the Note, select *Share feedback with management*
8. Click *OK*

To View or Modify Feedback:

1. In the *My Performance* area, click *Feedback*
2. Under the Note column, click the *Title* of the Feedback you want to view
3. The Feedback Note pop-up window displays containing all of the information for that Note
4. At this point you may do any of the following:
   1. Change the Title
   2. Add additional information in the Details field
   3. If you want to allow your manager to view the note, select *Share feedback with management*
5. Click the *OK* button when you are finished editing.

The Feedback Note is updated and the Last Modified date changes to today’s date
How do I use the Goals section?

The Goals Section is an area where employees can record, update and view their job-related goals. You can also modify the status and completion percent of a Goal from this area. Goals that are added in your performance review will appear here once the process is completed. Goals can also be added manually to this area by an employee or an employee’s manager.

Employees should use this area to track and communicate their progress towards the goals that they have set with their manager.

To Add a new Goal:

1. In the My Performance area, click Goals
2. Click the Add button
3. In the Title field, enter a Title that summarizes the Goal

Note: When you create a Goal, you are only required to give the Goal a title.

1. In the Description field, enter specific information about the goal
2. In the Weight field, enter a weight value.
3. Enter a Start Date, Due Date and/or Completed Date using the calendar icons
4. Click a **Status** from the Status drop-down list, then select a value in the **Percent Complete** list, and then click a **status radio button** in the **Progress Flag** area.

**To Edit a Goal:**

1. In the **My Performance** area, click the **Goals** link
2. Under the **Employee Goal** column, click the Goal you want to edit.
3. Under **Add Notes** update any updates for that goal such as tasks completed to date, challenges etc
4. Edit any field(s) as necessary
5. Click **OK**
6. The Goal is updated and the Last Modified date changes to today’s date.

**To Update the Status of a Goal:**

1. View a Goal you have created or add a new Goal
2. In the **Status** area, click an status in the **Status** drop-down list
3. In the **Percent Complete** drop-down list, select a percentage
4. Select a **Status** icon:

   ![Goal Status Icons](image)

   - The **Green** circle indicates the goals is on track
   - The **Red** octagon indicates the Goals is not on track
   - The **Yellow** triangle indicates the goal is at risk
   - The **Crossed Circle** indicates No Flag Set

   This section should be visited and modified whenever there is information to add to a goal (Completion percentage, Status, Notes)
How do I use Development Plans?

Development plans detail activities you are encouraged to complete in order to address skill areas which will benefit from developmental activities. Development plans that are added to your performance review form will appear here once the review form has been completed. Development plans can also be added manually by an employee or an employee’s manager.

Employees should use this area to track and communicate their progress on the development plans that they have set with their manager.

This section should be visited and modified whenever there is information to add to the Development Plan.

To View or Edit a Development Plan:

1. In the My Performance area, click the Development Plans link
2. Under the Development Plan column, select the Development Plan you want to edit.
3. Edit any field as necessary
4. Click OK.

The Development Plan is updated and the Last Modified date changes to today’s date.

To Add a new Development Plan manually:

1. In the My Performance area, click the Development Plans link
2. Click the Add button
3. In the Title field, enter a Title that summarizes the Development Plan
4. Enter the specific information about the required task in the Description field
5. If applicable select the Competency that the development plan is meant to improve from the Competency drop down list
6. Enter a Due Date and/or Completed Date using the calendar icons
7. Select a Status from the drop-down list
8. Click OK.

How can I view my Imported Documents?

You can view imported documents using the Documents link in your My Performance area. This is a useful place to store documents that are related to your job performance. This section should be visited whenever you would like to review an imported document.

Note – Imported documents may be added by your manager to your documents tab.

To view an Imported Document:

1. In the My Performance area, click the Documents link
2. The Imported Documents page displays the titles and import dates for the imported documents
3. In the Document column, click the title link for the document you want to view.
Appendix 1 – Sample – Form

SMGH Annual Performance Appraisal - Nursing

<table>
<thead>
<tr>
<th>Appraisal Score</th>
<th>Overall Score: [ ] / 10.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Identification</td>
<td></td>
</tr>
<tr>
<td>Employee Name:</td>
<td>Job Title:</td>
</tr>
<tr>
<td>Department:</td>
<td>Hire Date:</td>
</tr>
</tbody>
</table>

Introduction

Welcome to LEGACY, the competency based performance appraisal tool. LEGACY is an acronym for the following competencies: Leadership, Engagement, Goals, Analytical Thinking, Customer Focused, and You-Self Aware. Under each of these competencies are a set of behaviours that exemplify the extraordinary work of people who work within a healthcare environment. These behaviours provide the foundation for the review of job performance and provide an insight in order to maintain, improve, or excel in job related performance at St. Mary’s General Hospital.

Instructions:

Please review each statement carefully. Before you record your response, you should try to recall examples of situations where you have demonstrated/observed the behaviour. This will assist you in choosing the appropriate response.

Using the following scale, please indicate your assessment of the behaviour:

Performance Assessment Definitions

**Exceptional** - Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in industry-related professional and/or community groups.

**Exceeds Expectations** - Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works corroboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

**Proficient** - Meets all relevant performance standards. Seldom exceeds or falls short of desired results or objectives. Lacks appropriate level of skills or is inexperienced/still learning the scope of the job.

**Progressing** - Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate
Improvement, as required since the last performance review or performance improvement plan.

**Not Demonstrated** - Has not demonstrated this competency.

### Leadership

Willingly takes charge. Leads by example and motivates others to do the same. Fosters creativity and innovation, and stays focused on results to be achieved. Can integrate departmental vision and direction into realistic plans and programs.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Performance Assessment</th>
<th>Comments:</th>
<th>Employee Score</th>
<th>Manager Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency</td>
<td>0</td>
<td>Self: N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Leadership Score**

<table>
<thead>
<tr>
<th>Score:</th>
<th>0.00</th>
<th>2.50</th>
<th>5.00</th>
<th>7.50</th>
<th>10.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

### Engagement

Encourages others to take active pride in the organization and demonstrates support for senior management. Displays confidence in organizational leadership as well as trust, fairness, values, and respect i.e. how people like to be treated by others, both at work and outside of work.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Performance Assessment</th>
<th>Comments:</th>
<th>Employee Score</th>
<th>Manager Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Pride</td>
<td>0</td>
<td>Self: N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Organizational Pride**

Displays confidence in Leadership as well as trust, fairness, values and respect. Seeks out relationships with Leaders based on mutual respect. Supports and aligns themselves with hospital goals. Demonstrates pride in being employed at SMGH.
### Engagement Score

<table>
<thead>
<tr>
<th>Score:</th>
<th>0.00</th>
<th>2.50</th>
<th>5.00</th>
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<th>10.00</th>
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</thead>
<tbody>
<tr>
<td>Score:</td>
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<td></td>
</tr>
<tr>
<td>Organizational Pride</td>
<td></td>
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</table>

### Goals

Works to achieve results and improve individual and organizational contribution. Shows concern for working well or for surpassing a standard of excellence via challenging goals one has set; or trying something new that will improve organizational results (innovation). Effectively manages internal and external resources to achieve organizational goals.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Performance Assessment</th>
<th>Comments:</th>
<th>Employee Score</th>
<th>Manager Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountable</td>
<td></td>
<td>Self: N/A</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Aligns Priorities &amp; Resources</td>
<td></td>
<td>Self: N/A</td>
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</table>

### Goals Score

<table>
<thead>
<tr>
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<th>2.50</th>
<th>5.00</th>
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<tr>
<td>Accountable</td>
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</tbody>
</table>
Customer Focused

Goes beyond client expectations by anticipating their needs. Solicits feedback on services, programs and products delivered by the Organization. Seeks to improve systems, processes and procedures to better meet client needs. Takes responsibility for correcting client problems. Invites clients to participate in and contribute to decisions that are relevant to their needs. Implements quality management approaches and sets standards to increase work quality and timeliness.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Performance Assessment</th>
<th>Comments:</th>
<th>Employee Score:</th>
<th>Manager Score:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Commitment to Excellence</strong></td>
<td></td>
<td>Self: N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shows a passion for improving the delivery of patient care with a commitment to service excellence. Contributes to creating a safe working environment by ensuring observance of safety procedures and the identification of potential hazards.</td>
<td></td>
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</tr>
<tr>
<td><strong>Patient Centric</strong></td>
<td></td>
<td>Self: N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensures respectful flow of information follows patients to other units / departments when required. Cross collaborates with other members of healthcare team to ensure communication. Involvement of patients and families at multiple levels, not only in the care</td>
<td></td>
<td></td>
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<tr>
<td><strong>Cultural Competence</strong></td>
<td></td>
<td>Self: N/A</td>
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</tr>
<tr>
<td>Treats all individuals with respect regardless of individual differences (e.g., race, gender, age, ethnicity, physical capabilities/disabilities, sexual orientation, religion).</td>
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<tr>
<td><strong>Communication</strong></td>
<td></td>
<td>Self: N/A</td>
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<tr>
<td>Promotes communication with co-workers and intercollaborative healthcare workers to ensure the best patient outcomes.</td>
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</table>
## You-Self Aware

Demonstrates self awareness. Uses self awareness to better understand others and to adapt their behavior accordingly. Builds and nurtures strong lasting and mutually beneficial relationships. Resolves conflict in a positive manner, remains composed.

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<tr>
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<th>Manager Score</th>
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</thead>
<tbody>
<tr>
<td>Career Management</td>
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<td>Self: N/A</td>
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</tr>
<tr>
<td>Balance Work &amp; Home</td>
<td>0</td>
<td>Self: N/A</td>
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</tr>
<tr>
<td>Compassion &amp; Sensitivity</td>
<td>0</td>
<td>Self: N/A</td>
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<tr>
<td>Composure</td>
<td>0</td>
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</table>
### You-Self Aware Score

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<tr>
<th>Score:</th>
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### Career Goals

Please indicate your career goals below. (e.g. educational course, promotion, special project)

<table>
<thead>
<tr>
<th>Title:</th>
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### Development Plan

Development Objectives

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<th>Title:</th>
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### Employee Comments

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