Halogen Goal Setting

*Employee Guide*
Annual Review Process - Goal Setting
PM & Confidential Employee Guide

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Goal Setting Process

Performance planning is the beginning of the Annual Review Process. It involves the planning of goals/objectives, expectations, and professional development activities for the coming year.

Goal Setting is a collaborative process that occurs between staff member and manager and should be discussed and agreed upon together. As the year progresses and changes to the objectives and expectations occur, further refinement to the plans can be made.

Goal Setting is a TWO STEP process

**STEP 1:** As the first step in the process, the manager meets with the employee to discuss work related goals and professional development activities for the upcoming year. In preparation for the discussion with the employee, the manager should outline how their own goals for the coming year may relate to each employee, as goals are often connected and cascading. Managers can help employees understand the connection of their own work to the broader goals and objectives of the Department. Goals should follow the SMART Goal principles. Once the manager and employee determine and agree on the employee’s goals, the employee records them in the Halogen Goal Setting tool and submits them through the software, to their manager for approval.

**STEP 2:** The manager then logs into the Halogen Goal Setting tool and reviews, edits and/or approves their employees’ goals.
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It is important that managers maintain open lines of communications with their employees throughout the year and discuss goal status, making any necessary adjustments to the goals, timelines etc., if necessary.

AFTER THE ONLINE GOAL SETTING PROCESS IS COMPLETED

The approved goals and professional development activities are stored in the Halogen system on the employee’s My Performance page. Both the employee and manager have access to these records any time throughout the review period and can record changes, barriers, and successes towards completion of the agreed upon goals and professional development activities.

Employees can continue to add goals and professional development activities in the Halogen system to record new, unexpected projects after the online Goal Setting process is completed. The manager can review the newly added goals and professional development activities within Halogen and provide comments.

It is important that managers maintain open lines of communication with their employees throughout the year and discuss goal/project status, making any necessary adjustments to the goals, timelines etc., if necessary.
Getting Started

All documentation, resources, login button, as well as support contact information for the Goal Setting process and Halogen Performance can be found at:
Goal Setting web page

Please note: Access to Halogen Performance has been designed to work best with the following browsers
- Windows: MS Internet Explorer 9, 10, and 11 (certified)
- Windows: Firefox 5.0+
- Windows: Chrome
- Mac OS X: Firefox 5.0+
- Mac OS X: Safari 5.0+
- Mac OS X: Chrome

The Home Screen

Upon logging into Halogen software you will be presented with the Home screen. The My Tasks section of the Home screen will list all outstanding tasks awaiting completion.

All tasks will be displayed in this section. For ease of use, tasks are coded in the first column with one of the following graphic indicators found in the Legend below.

Legend: ⬆️ Overdue ⬜️ My To-Do ⬆️ Sent for Review ⬝ Not Ready ✔️ Completed

You will only have to act on the task types that have indicators: ⬜️ My To-Do & ⬆️ Overdue
Navigating the Online Goal Setting Form

Clicking on the Discuss with Reviewer & Write your Goals link will take you to the Goal Setting form.

The form window has two sections:
- RIGHT SIDE - The main (scrollable) form
- LEFT SIDE - The form navigator

You can navigate to a specific section by clicking on the respective section headings found in the Form Navigator on the left hand side of the form or by using the scrollbar on the right hand side of the form window.

Tips! You can type directly or cut and paste your comments into the text boxes. Any text pasted from other source documents will be pasted as plain text and not carry any formatting.
On your top right are the **Save** and **Submit** buttons.

Start with completion of the Performance Goals/Objectives section.

Type the content of your first goal into the text boxes provided.
- You may also copy & paste if preferred, but note the text boxes are plain text, and will not hold any formatting when content is pasted.

You can add a **Due date** by clicking on the **calendar icon** related to each goal.
Please ignore the “link” icon and as well as the “add annotation” icon, as these are functions we do not use in the goal/objective setting online processes.

You can **add up to five (5) Goals/Objectives** for your Manager’s approval. To add another goal, click on **Add New Goal**:

Next, complete the Professional Development Activities section similarly to your Performance Goals / Objectives.

Click the **Save** button if you would like to save updates to the form and come back later to finalize your work on your goals and professional development activities.

Once Goals and Professional development activities have been added to the form and you are ready to submit them to your Manager for review and approval, click the **Submit** button.
Important Notes

Once you have submitted your goals and professional development activities to your Manager for approval, the online form will be routed to your Manager. You will not have access to update the content of the form.

**NOTE:** Your manager can edit the goals that you submitted before approving them. Note that Halogen will not send an automatic email when your manager approves your goals in the system.

At any time in the process you can check the approval status of your goals/development activities by clicking on the status link found in the My Tasks section on the Home page.

A window will appear showing you whether or not your goals are approved. In the screen shot below, the goals/development activities have not been approved by the manager yet. When the goals are approved, the green circle with a checkmark will appear for both tasks.

<table>
<thead>
<tr>
<th>Status for My Evaluation - Goal Setting - 2015 Demo (2 steps)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>Discuss with Reviewer &amp; Employee Writes Goals</td>
</tr>
<tr>
<td>Reviewer Comments &amp; Approves Goals</td>
</tr>
</tbody>
</table>
In order to review the approved goals and professional development activities, click on My Performance.

Use the headings to toggle between your Goals and Professional Development:

In order to document changes, barriers, and successes towards completion of the agreed upon goals and development activities, you and your manager can add notes to each of your goals in Halogen throughout the review period.

These notes will not edit the original content of your approved goals. The notes will be saved so that you can readily refer back to them when it comes time to fill out your performance assessment, and create your Activity Report. The content of the notes can be copied and pasted, or simply used as a reminder.

You will not get a notification from the Halogen system when your manager adds a note to your goals, nor will your manager be notified when you add a note to your goals. Both manager and employee can view the employee’s Goals and can add and view notes to a particular goal (if needed) at any time.
Click on specific goals to add notes to that goal.

A window will pop up where you can type your notes. Click **Add** to save your note before clicking **OK**.
Edit or delete a note by clicking on the pencil or trash can icons:
How to Add New Goals after Initial Goals Have Been Approved?

You can continue to add goals in the Halogen system to record new, unexpected projects. Your manager can review the newly added goals within Halogen and provide comments.

When viewing the list of your goals, click **Add**.

Then proceed to enter the relevant information into the window that pops up.
Where to Get Help

**Process Support:** For assistance regarding your goals / professional development activities, visit the [Goal Setting web page](#) or contact your [Divisional HR Office](#).

**What if my Manager information is incorrect?** The Halogen software uses positional based workflows which are captured in HRIS. Any information that is not current or that requires modification should be directed to your [HR Divisional Office](#) for correction.

**I am having a technical issue with the Halogen Software:** If you are experiencing any technical issues with Halogen, please email [compensation.hr@utoronto.ca](mailto:compensation.hr@utoronto.ca) for direct support and assistance during regular working hours.