Halogen Goal Setting

Manager 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. 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.
Completing the Online Goal Setting Form

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:
http://pay.hrandequity.utoronto.ca/performance-pm-c/#goalsetting

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 **Reviewer Comments & Approves Goals (1 To-Do)** link will take you to the Task Status Page:

To open a Goal Setting form for an individual employee, click on the blue link **Review & Edit** in front of the employee’s name:
After you click on the **Review & Edit** link, you will be in 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.

On your top right are the **Save** and **Submit** buttons.
When the Manager opens the form, the titles and content of the Goals/Objectives and Developmental activity descriptors will be prepopulated in the text fields, reflecting the content that the Employee typed in the form.

How to Edit the Content of Goals and Development Activities?

The Manager can edit both the title and the descriptor in the text fields. The field that is highlighted in grey will remain unchanged. If there are no edits to the content of the descriptors, the Manager can save and submit the form.

To edit the content of the Goal/Objective or Development activity descriptor, type directly into the text box for the corresponding Goal or Development Activity.

Note: You may also copy & paste if preferred, but the text boxes are plain text, and will not hold any formatting when content is pasted.
How to Add a New Goal or Development Activity?

The Employee can **add up to five (5) Goals/Objectives and Professional Development Activities** for their Manager’s approval. If the list of Goals or Development activities the Employee submits contains less than five, the Manager can add a new goal or development activity to the form.

Click on **Add New Goal** to add another goal.

A text field for new Goals will appear:

Add content for the new Goal by typing (or copy and paste) the information into the text fields.

Add or change a due date by clicking on the **calendar icon** related to each goal.

**Note:** The newly added Goal can be deleted by clicking on the blue word **Delete**.
Similarly, the Manager can review their employees’ Professional Development Activities, and make changes as necessary.

Click **Save** if you would like to close the form and come back to it later. Click **Submit** to approve the form.

Once approved, the Manager can find a PDF copy of the completed Goal Setting form under the **Performance Reviews** section for each of their Employees:

![Goal Setting Form Screenshot]

Employees can find them in their Goals and Professional Development under **My Performance**.

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**Important Notes**

Halogen will not send an automatic notification when you approve your employees’ goals. Please let your employees know when you have approved their goals in the system.

Please note we are not currently utilizing the link to Organizational goals. Please disregard this functionality.

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**Reviewing Goals and Adding Notes Once Goals Have Been Approved**

In order to review the approved goals and professional development activities, click on the **My Employees** tab. You will see a list of the employees who report to you directly or who were added as your subordinates for the Goal Setting process.

![Employee List Screenshot]

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Click on the numbers under the “Goals” or “Development Plans” for the employee you would like to comment on or review the Goals.

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

In order to record changes, barriers, and successes towards completion of the agreed upon goals and development activities, the Manager and the Employee can add notes to each of the approved goals in Halogen throughout the review period.

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

Your employee will not get notification from the Halogen system when you add a note to their goals. However, both manager and employee can view the employee’s Goals and can add and view notes for a particular goal at any time.

Click on specific goals to review or add notes to that goal. A window will pop up where you can type your notes.
Type the note in the text field and then click **Add** to save your note.

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?

The Manager can add new goals to the employee’s approved Goals’ list at any time.

Click on the My Employees section in Halogen.

Click on the numbers under the “Goals” or “Development Plans” for the employee you would like to comment on or review the Goals.

When viewing the list of your employee’s goals, click Add
Then proceed to enter the relevant information into the window that pops up.

Click Ok to save the new goal.

The goal will appear in the list of the Goals on the Employee’s “Goals” page, and it will be indicated that the Goal was added by the Manager along with the date of when it was added.

Where to Get Help

Process Support: Resources to assist you regarding your goals / professional development activities, visit the Goal Setting web page or contact your Divisional HR Office.

What if my Direct Report 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.

For any non-technical questions, or if your reporting relationship is incorrect, please contact your Divisional HR Office.

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 for direct support and assistance during regular working hours.