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Performance Assessment Introduction

Performance planning and assessment is an ongoing process of communication between managers and their staff. The process involves a proactive planning component at the beginning of the performance year; ongoing feedback and coaching during the year culminating with a performance assessment at the end of the review period. The performance assessment process at the University is designed to be a two way exchange of information. The intention of the performance review is to provide employees with an understanding of their annual accomplishments and areas which require improvement by using a standard rating system. It is also designed to identify work objectives and training and development activities for the upcoming year.

There are three main areas that an Employee can focus on to prepare for the process:

- The Activity Report (Part A of the assessment form)
- The Performance Assessment Meeting (receiving feedback from the manager)
- Managing Upwards (way to facilitate the process by working with your manager to ensure the process goes smoothly)

Performance Assessment Process

The Performance Assessment process has 5 core steps that facilitate a review and discussion with an employee about their performance of goals and responsibilities.

- **Step 1:** The employee documents their accomplishments and progress over the review period.
- **Step 2:** The manager rates the employee’s performance in relation to applicable positional competencies and operational objectives.
- **Step 3:** Divisional Management and HR review all assessments to ensure equity and consistency.
- **Step 4:** The manager meets face to face with employee to discuss the performance assessment and overall rating.
- **Step 5:** The employee confirms they have received their assessment and can add any final comments to the form.

Planning and Goal setting activities feed into this process. Further instructions on how to do this in Halogen will be available at a later date.
Employee Responsibilities during the Performance Assessment Process

To complete the Activity Report Employees will use Halogen Performance to facilitate the entire Performance Assessment process, the new tool also acts as an online repository to keep track of Employee’s goals / objectives, development plans, and any feedback / notes (with respect to your accomplishments), as well as assessments provided by the Reviewer during the assessment period all year long.

Employees will be responsible for completing the appropriate sections within Part A of the Performance Assessment form online. Prior to completing the form, please review the following:

- Reaquaint yourself with your job description, critical competencies for your role and performance expectations as defined by you and your manager.
- Familiarize yourself with the rating scale used for assessments.
- Provide honest and open information to help both you and your manager get a broader, more objective view of your performance over the entire period, and avoid being biased.
- Be objective and provide your manager with quantitative/qualitative facts as you report on your achievements.
- Provide details on how you demonstrated core and job specific competencies and on how you accomplished your goals.
- Provide your manager with contacts who may be able to comment on your performance.
- Review any navigational Halogen tools and resources to help you get on the system and seamlessly submit your Activity Report.
Write your Activity Report (Part A): *Walkthrough of the Online Assessment Form*

**Getting Started**

Where to go to find your support resources as well as the login link to Halogen Performance?

All documentation, resources, login button as well as support contact information for the Performance Assessment process and Halogen Performance can be found at: [http://pay.hrandequity.utoronto.ca/performance-pm-c/](http://pay.hrandequity.utoronto.ca/performance-pm-c/)

**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

**Login**

Completing the Online Assessment Form

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
Annual Performance Assessment Process – Employee Guide

Completing the Performance Assessment Form

- Once the Annual Performance Assessment Process has been launched, employees that are reviewed in the process will have a task to complete called Employee writes Activity Report:
  - Employee writes Activity Report

- Clicking on the Employee writes Activity Report link will take you to the Performance Assessment Form.

Navigating the Online Assessment Form

Once you have clicked on a task to begin its completion you will enter the Annual Performance Assessment form window. Employees will be required to complete all applicable sections in Part A: Activity Report

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 will not carry any formatting.
What are the Sections in Employee Section Part A - Employee Activity Report?

The sections of Part A: Activity Report allow you to report on your key accomplishments in relation to the previously agreed objectives/goals, provide feedback on any training undertaken to meet performance goals, articulate service to your profession and any service to the University you have engaged in. The Chart below provides more details with respect to content required for each section.

<table>
<thead>
<tr>
<th>Section</th>
<th>Content Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Accomplishments in Relation to Planned Objectives</td>
<td>State and describe your key accomplishments in relation to your planned objectives/goals for the review period.</td>
</tr>
<tr>
<td>Other Accomplishments – Unplanned</td>
<td>State and describe any unplanned accomplishments for the review period.</td>
</tr>
<tr>
<td>Professional Development Undertaken Personally</td>
<td>List any professional development undertaken personally during the review period (i.e., courses, conferences etc.).</td>
</tr>
<tr>
<td>Professional Development of Employees Supervised</td>
<td><em>(Only applicable for staff with Management/Supervision Responsibilities)</em>  If you have employees you supervise/manage, document any professional development/training the employee undertook within the review period. Indicate as N/A if you do not have any supervision of employees.</td>
</tr>
<tr>
<td>Contact Information for Additional Feedback</td>
<td>List people your Reviewer could contact to obtain additional feedback on your performance (where applicable). Please include their name, title, email and phone number.</td>
</tr>
<tr>
<td>Tips! You can create feedback notes that you can choose to share with your Manager to incorporate any feedback messages you may have received.</td>
<td></td>
</tr>
<tr>
<td>Service to Profession</td>
<td>List and describe (where applicable) any service to a profession you have undertaken (e.g. support provided to professional association that you might belong to, etc.).</td>
</tr>
<tr>
<td>Service to the University of Toronto</td>
<td>List and describe (where applicable), service to the University of Toronto (e.g. participation with committees, governance bodies etc.)</td>
</tr>
</tbody>
</table>
How to attach a CV or other document?

Documents can be stored in Halogen for your reviewer to take into consideration when evaluating your performance assessment. The document can be added to your Halogen My Performance page. To add a document, click on the Add button, then click on browse for document, and once you have selected the document you would like to add, click OK. Any documents added will automatically be viewable by your Reviewer.

How to attach Feedback to your Halogen Performance page?

Employees can track accomplishments throughout the year so that they can be highlighted during the performance appraisal process. Feedback, such as thank you notes from your Reviewer, colleagues or students, or any Awards and Recognition received during the review period can be kept in the Feedback area. To add feedback, click on My Performance, then Feedback, then click on the Add button, and choose Employee Note:
Once you have typed the content you would like to store, click the **Share feedback with management** box if you would like your reviewer to see the feedback. To save your feedback, click **OK**.

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

The [Halogen Additional Functionality Guide](http://pay.hrandedquity.utoronto.ca/performance-help/) provides detailed information on how to add documents and feedback to your Halogen Performance Home page. Additional Halogen help documents can be found at: http://pay.hrandedquity.utoronto.ca/performance-help/
What is the status of my assessment?

Once submitted, the online assessment form will be routed to your Reviewer for assessment. Your Reviewer will provide feedback based on the competencies that align with your position. They will also rate and provide comments on your accomplishments and overall performance, and once completed, they will submit the appraisal for Divisional Review.

At any time in the process you can check the status of your appraisal by clicking on the status link found in the My Tasks section on your Home page:
Annual Performance Assessment Process – Employee Guide

Once your assessment is approved

Your Reviewer will meet with you to conduct a face to face performance assessment discussion and go over their ratings and comments. Once this has been done your reviewer will release your assessment to you for overall comments about your performance.

Employees will close off the Performance Assessment by confirming that a discussion with your reviewer has taken place, and that you have had the opportunity to comment on the rating. To close the assessment, click on Complete at the top right of the form.

Please note you do not need to insert an electronic signature.
To assist Employees and Reviewers in completing the performance assessment form, the online tool contains all relevant task deadlines. Timelines are also posted on the Performance Assessment page of the HR & Equity website at http://pay.hrandequity.utoronto.ca/performance-pm-c/

Automatic notifications will be sent to each employee via their utoronto.ca email with reminders prior to deadlines and for any overdue tasks that require attention.

To assist you with the performance assessment process review the resources at Performance Assessment webpage at: http://pay.hrandequity.utoronto.ca/performance-pm-c/

Help with Halogen can be found at: http://pay.hrandequity.utoronto.ca/performance-help/

Please refer to the Help webpage at if you have questions about the completion of the online assessment form.

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.

For any non-technical questions about the performance assessment program and/or process, such as questions about reporting relationships or the requirement to complete the performance assessment process, please contact your HR Divisional Office.

For technical difficulties only, please send your enquiry to compensation.hr@utoronto.ca The email address will be monitored during regular business hours.