

## Frequently Asked Questions

### Q: How do I access Halogen?

A: Located in the lower right side of your insideloyola.edu page, under your “**Quick Links**” you will click on “**Performance Management**”. Single sign-on has been installed, once you click you will automatically be redirected to your personalized Halogen page.

### Q. Who do I contact if I can’t access Halogen?

A. Call the OTS helpdesk at x5555.

### Q. Who should I contact if I have any questions about the evaluation process?

A. If you need assistance with any aspect of the Performance Evaluation Process, please contact your HR Partner:

Name	Title	Divisions Assigned	Extension
Karen Feeley	Director Employee Engagement	President’s Office	Ext. 1345
Elaine Kudsieh	Senior HR Partner	Advancement, Enrollment Management, Marketing and Communications, Vice President Special Assistant	Ext. 1343
Bonnie Wrzosek	HR Partner	Business and Finance, Student Development	Ext. 1367
Toya Daily-Smith	Senior HR Partner	Academic Affairs, Loyola College, School of Education, Sellinger School of Business Management	Ext. 1360

You may also contact Mike Jimenez, Assistant Director HRIS at Ext 1340 or Georgeann Burton, Director of Compensation and HR Operations at 1364 with any systems related issues.

### Q. Where can I find information about this year’s performance evaluation process?

A. Additional resources may be found on the human resources website at:  
<https://www.loyola.edu/departments/hr/compensation/performance>.

### Q. There are no goals in the evaluation form, why?

Due to shifting work challenges associated with Covid-19, the goal setting portion of last year’s evaluation process was incomplete for many employees. Goals that were completed and signed by the next level supervisor (for 3/1/2021 through 2/28/2022) will populate into the evaluation process for this evaluation period. If goals were not populated into this year’s form, supervisors will document 1-3 goals/objectives that were previously discussed with the employee throughout the review period.

### Q. What are we supposed to do with the mission, vision and values section?

A. This section in the performance forms for goal-setting is a non-scored component designed to encourage conversations between the supervisor and employee about how the employee’s work embodies our core mission and how the employee represents our values. The definitions within the form is a subset,

though, so supervisors should review the entire definitions and talk about how these can be demonstrated within work life at Loyola. <https://www.loyola.edu/about/mission>. For ideas, watch members of the Loyola University Maryland community discuss ways in which they, their students, their departments and the University as a whole, approach and support the mission: <https://www.loyola.edu/department/mission-integration/on-campus/encountering-mission>.

**Q. What is the time period is covered for the annual evaluation?**

A. The evaluation should review work from March 1, 2021 through February 28, 2022.

**Q. What are the steps and important dates in the annual evaluation process?**

Please refer to the website: <https://www.loyola.edu/department/hr/compensation/performance>

**Q. How do I know if I need to do an annual evaluation for my new employee?**

A. If an **Administrator** was hired on or after April 1, 2021 **AND** the provisional evaluation has been completed, they do NOT need an annual evaluation.

If a **Staff** was hired on or after September 1, 2021 **AND** the provisional evaluation has been completed, they do NOT need an annual evaluation.

If the employee's provisional period ends during the performance evaluation period, complete the provisional evaluation using the Halogen tool.

**Q. Where can I get a copy of the job description?**

A. Contact your supervisor.

**Q. What if my employees are missing or Halogen lists individuals who are not my direct reports?**

A. The office of human resources has made every effort to ensure correct supervisors are identified, but if there is an error, contact your HR Partner immediately. The change may require supervisory approval and an email. You can contact your HR Partner with the information. If an employee is missing and a new hire, it may be that their provisional evaluation will be due first so therefore they will not be in the annual process.

**Q. How do you assign the appraisal to a different manager?**

A. You can change the manager under the "Task Status" menu. You will click on the employee you would like to change. On the middle right of the screen you will see a button that says "Assign to Other Supervisor". Click the button and a search window will open. Once you find the manager you would like to assign the employee to, click on the name and hit send. The manager will receive an email notification and the review will show up under their Tasks. Only managers who have employees already listed under them will show up in the search function.

**Q. What happens when a goal changes during the year or something supersedes it? Can they be changed or deleted?**

A. Goals can and often should change throughout the year but should happen as a discussion between the supervisor and employee. While we do not recommend ever deleting goals that were established, if that

goal is no longer relevant it can be rated as N/A (not applicable). If the supervisor wishes to modify a goal, they would contact their HR Partner to roll the evaluation back to a step in which goals are editable.

**Q. Are self-evaluations required?**

A. Many employees will not have goals populated into this year's review form; therefore HR will not launch the self-review process for this year. Employees who wish to submit an optional self-review are instructed to email a word or PDF document in narrative form to their supervisor. Supervisors should forward those documents to HR who will upload them to Halogen under respective employees' "My Performance", "Documents". A sample form is available on the website <https://www.loyola.edu/departments/hr/compensation/performance>.

**Q. One of my employees is listed under "My Employees" but is not listed under "Task Status". What does this mean?**

A. This usually means that the employee is your direct report, but you recently completed a provisional evaluation for the employee. You are not required to complete another evaluation for any administrator who received a provisional evaluation in the past 180 days, or a staff employee who received a provisional evaluation in the past 90 days.

**Q. I am trying to complete the evaluation and I keep getting the error message "In section, the sum of goal weights must equal 100 or 0". What does this mean?**

A. This message comes up when you have not weighted your new goals properly. The percentage weight of your goals must equal 100, you will need to type in a number beside each goal. Review the form to make sure no areas are left blank.

**Q. What is calibration?**

A. The practice of performance calibration refers to the steps taken to make sure that managers apply a consistent set of standards in making performance ratings. The process ensures:

- A fair and objective performance appraisal of past performance is made for each employee in relation to others in similar roles and/or job levels, and;
- Managers apply similar standards to all employees.

Once the evaluations are written and scored, they will now come to HR for review. HR will compile data and review with Vice-Presidents as part of the calibration process. Supervisors will receive authorization to move forward with performance conversations after those meetings have occurred.

**Q. Now that our job description/job duties are a rated part of the evaluation, what do I do if I think my job description is out of date?**

A. Discuss this with your supervisor. The supervisor may request a copy of the job description from the HR Partner. If duties have changed over time (typically 20% or more), the supervisor may work with the HR Partner to update the job description to better reflect the work being performed. Please note that changing the duties within a job description does not automatically mean there's a compensable change. As always, job descriptions are reviewed against market data and priced based on those comparisons.

**Q. How would I view my previous evaluation(s)?**

A. You can access your previous evaluation(s) by clicking on the “My Performance” tab at the top of the screen. Once there click on the evaluations section. In the column all the way to the right-hand side you can click on “View” to see a PDF copy of your evaluation.

**Q. I now received an alert of "task past due" but cannot determine what next step is needed or how to proceed through the system?**

A. This could indicate you completed the task but forgot to click "Complete" in the upper right-hand corner to send it to the next level. If you're unsure, contact your HR Partner for assistance.

**Q. How do I submit my comments on my evaluation?**

A. Once you log in you'll need to click Employee Signature. Then you can add comments and electronically sign-off by clicking “Sign-off” in the upper right-hand corner of the form.

**Q. Evaluations for my department have been reviewed and returned to me. How does the employee “review” and “sign off”?**

A. Once evaluations are complete, meet with each of your direct reports and discuss the evaluation. Once you have met with your direct reports, login to Halogen to complete the “task”. Then employees will be able to sign off on the evaluation electronically. The supervisor will not be able to sign off until the employee has signed off.

**Q. Why did my information “disappear” from Halogen?**

A. The system “times out” if it is left unused for a period of time. This is a security feature. Remember to save your information periodically.

**Q. What is the difference between “Send for Review” and “Complete”?**

A. “Send for Review” lets the supervisor send the evaluation to a 3<sup>rd</sup> party for feedback and review. “Complete” moves the evaluation forwards in the process and sends the evaluation to the second level supervisor to review. Once the second level supervisor approves the evaluation it is time for the supervisor and employee to meet and review the evaluation together.

**Q. What are the reasons why I would use the “Send for Review” function? (Third party feedback)**

A. You should only send the evaluation for third party feedback when the employee is a shared resource, or if the employee recently transferred to your department.

**Q. How do I send my employee’s appraisal to a third party for feedback?**

A. Open the employee’s appraisal you wish to send to a third party. Once you are in the appraisal on the top left side of the appraisal, there will be a button that reads “Send for Review”. Once you click on this button it, it will open a search window for you to look up the third party. Once you find the third party, click on the name and hit send. The third party will receive an email notification and the review will show up under his Tasks.

The third party will only be able to make comments and is not able to change evaluation scores or goals. Once the third party makes comments and hits complete it will return to the supervisor, the supervisor can review and acknowledge the comments and make any changes needed. Comments made by a third party will not be saved after the supervisor clicks complete.

**Q. The “Performance Management” link is not working, what should I do?**

A. First try a different browser. If you still cannot access the site, please contact Mike Jimenez, Assistant Director HRIS at Ext 1340 or Georgeann Burton, Director of Compensation and HR Operations at 1364.

**Q. What do I do if my employee is out on leave and will not return to sign off on the evaluation by the end of April 2022?**

A. Print the evaluation and meet with the staff when they return from leave. Send a copy of the evaluation signed by both you and the staff member to Human Resources to be uploaded into their Halogen portal.

**Q. I am not able to sign off on the evaluation, I clicked the sign off button and nothing is happening. What should I do?**

A. There have been issues reported from users who use Chrome or FireFox, if this happens to you try switching to Internet Explorer.