



# Performance Management System (Saba/Halogen)

Training Series - 2019



# How to use the Perf Mgmt System

- Introduction to Saba/Halogen for new users
- Refresher for current users



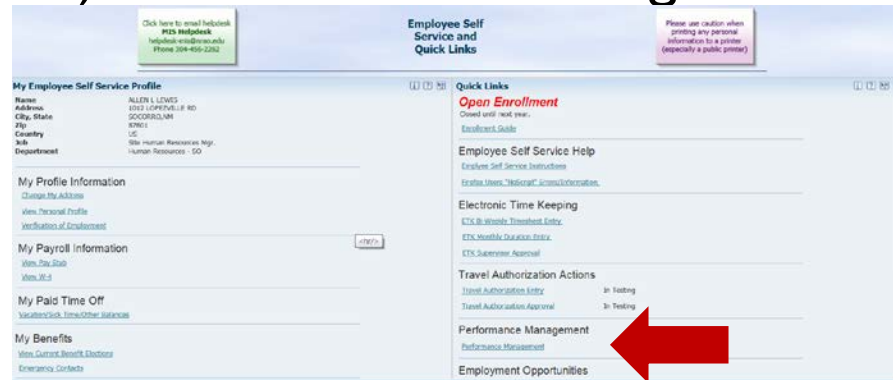
# System Security

- Authentication via NRAO Active Directory (Windows)
  - Performed on OUR servers with SSL ("https" in browser URL)
  - No passwords sent to, or stored on, Halogen site
- No highly sensitive data on Saba/Halogen site
  - We do NOT store SSN's or any other "SECURE" data on their site
  - Only the necessary PEP related information stored there
  - Data Security Policy levels: Confidential or lower.



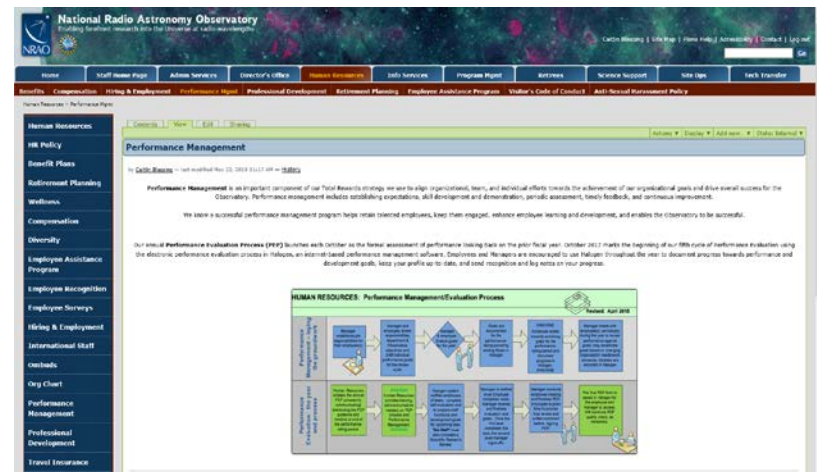
# Login using NRAO AD credentials

- Type “pep.aui.edu” into your Internet browser
- Employee Self Service (ESS) – Performance Management Link



- HR Website – Performance Management Tab

Use your NRAO AD username and password when prompted to login.



# My Tasks

- When you sign you'll find a "to do" item in "My Tasks"

Tasks (2) | [All Tasks](#) |

9/21/2018

Write your self-appraisal and draft new goals.

PEP TEST

11/21/2018

Sign-off your appraisal

PEP TEST

Not ready

Shortcuts

Recruiting

Share

Do you have fee



# Complete Self Appraisal

## 3 Required Sections:

1. **Key Responsibilities** – Write short description of overall job duties/responsibilities.
2. **Self Evaluation of Functional Goals** – Provide a summary of your accomplishments and a performance rating for each goal.
3. **Establish New Goals** – Set 3-5 SMART goals to be accomplished in the next fiscal year.

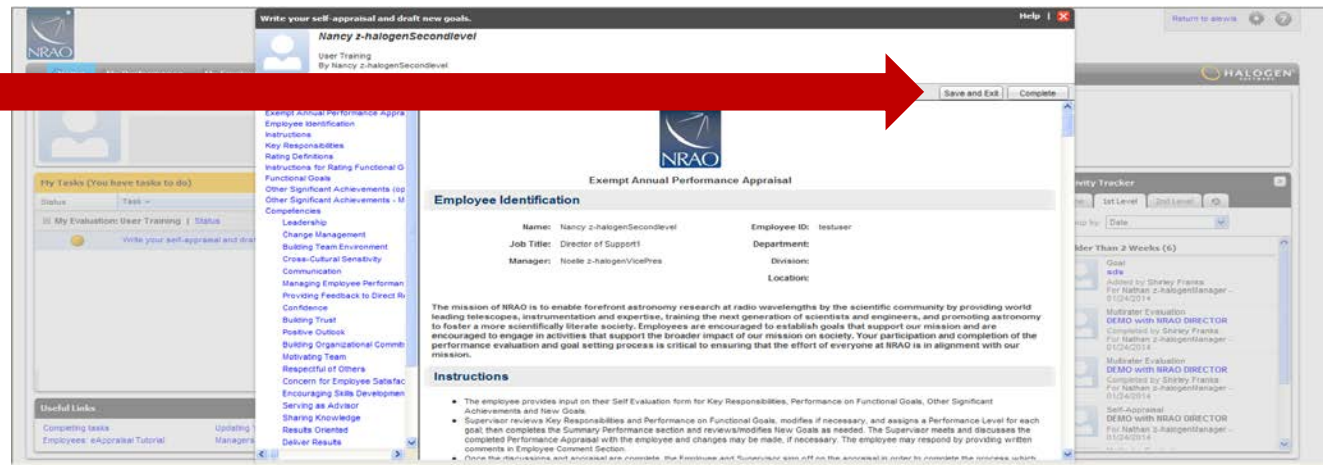
## Optional Sections:

- Other Significant Achievements – Summarize accomplishment outside of goals.
- Optional Development Goal – Set 1-2 goals aimed at expanding your skill set and furthering your career growth.
- Employee Summary Comments – Room for additional comments not captured elsewhere.



# Complete Self Appraisal

Save & Exit  
allows you  
to complete  
a little at a  
time!





# Section 2: Evaluate Functional Goals

- Goals migrate from personal goal page to your self-evaluation
  - If your goals don't appear on my PEP form:
    - You will need to copy/paste from your last years document.
    - If you're a new employee and you've not accessed your "Goals page," you will need to add goals that you've been working on by selecting "add goal."
- Comments migrate from personal goal page if you have entered goals while tracking progress against your goal on your personal page.





# Evaluate Functional Goals

Describe your performance **here.**

Be sure to select a **rating!**

Also, can add feedback you have received to support your goal accomplishments.

Write your self-appraisal and draft new goals. Help

Kevin z-halogenEmployee  
PEP TEST  
By Kevin z-halogenEmployee

Form Navigator

Unacceptable Performance - Made little to no effort to re-negotiate the goal or seek guidance/assistance in achieving the goal

Save and Exit Complete

Exempt Annual Performance Evaluation  
Period of Evaluation: October 1, 2017  
Employee Identification  
Instructions  
Section 1: Key Responsibilities  
Section 2: Rating of Functional Goals  
Section 3: Establish New Goals  
Other Significant Achievements (optional)  
Overall Rating  
SMART Goals  
Please consider these guidelines when Development Goals (optional)  
Employee Summary Comments (optional)  
Manager Summary Comments  
Electronic Signature Notification

Functional Goals (0%)

Goal	Accomplishments	Weight
Title: Revamp quarterly check-in meetings *Specific: I want my group's one-on-one check-ins to be more efficient and focused. *Measurable: I will send out a flow-down self-assessment to my employees three weeks before check-ins. I will give them two weeks to complete the assessment, then allow myself one week to review the assessments before we meet in person. Each meeting will be scheduled for 30 minutes. *Attainable: Meetings are currently scheduled for one hour and typically unstructured. Employees are not asked to complete any assessment beforehand. *Relevant: Ties into the organization's mission of improving communication between managers and employees. *Time-Based: I will implement these changes for next quarter's check-ins.		4.0 %

Comments  
[CATLIN O'ROURKE BLESSING as Kevin z-halogenEmployee on 2016/08/13 (Edited)] First quarterly meetings scheduled for week of January 1, 2016. Sent self-assessments week on Dec 7. Daily check-in meetings were markedly more efficient, worked through project issues, set goals with specific steps for accomplishing goals for next quarter.  
[CATLIN O'ROURKE BLESSING as Kevin z-halogenEmployee on 2016/08/13] Second quarterly meetings scheduled for week of April 1 2016. Received feedback from staff that the first quarterly meetings helped them focus on what was important and provided action plan to accomplish goals. Two of three employees were able to fully accomplish goals and came to 2nd qtrly meeting with goals outlined for next quarter.  
[CATLIN O'ROURKE BLESSING as Kevin z-halogenEmployee on 2016/08/13] Third quarterly meetings scheduled for week of June 1 2016. Spent 30 minutes with each employee on project goals and 30 minutes talking about how to make the quarterly check-in meetings most effective. Two employees like the current approach. Meetings were set for the next year and reminders set for each employee to email me 1 week for meeting with responses to self-assessment questions. One employee would prefer more frequent 15 minute monthly check-in meetings along with quarterly check-in meetings.

Rating: [Dropdown menu]  
Notes: [Text area]

 [Attach Feedback](#)



# Section 3: Establish New Goals

Set 3-5 new SMART goals  
Add a **Goal Title** and a brief, but specific **Description**.  
Establish due dates.

For additional goals, select  
**“Add New Goal”**  
Think about Development Goals in relation to future goals!

By Kevin z-halogenEmployee

Form Navigator

Save and Exit Complete

Time-bound: Set 1 or more target dates, the "by when" to guide your goal to successful and timely completion (include deadlines, dates and frequency)

Please consider these guidelines when you are developing your SMART goals

Managers - You must copy, paste, edit or replace the goal the employee submits into the boxes provided below. Only the goals in the manager's section will be considered the approved goals for the next review period and will migrate to the employee's personal Halogen page.

Goal: Please include a title, description, and start/duel dates for each new goal

Weight

Title

Start:  Due:

Attach Feedback

Goal: Please include a title, description, and start/duel dates for each new goal

Weight

Title

Start:  Due:

Attach Feedback

Add New Goal

- S** • **Specific:** State exactly what you want to accomplish (Who, What, Where, Why)
- M** • **Measurable:** How will you demonstrate and evaluate the extent to which the goal has been met?
- A** • **Achievable:** stretch and challenging goals within ability to achieve outcome. What is the action-oriented verb?
- R** • **Relevant:** How does the goal tie into your key responsibilities? How is it aligned to objectives?
- T** • **Time-bound:** Set 1 or more target dates, the "by when" to guide your goal to successful and timely completion (include deadlines, dates and frequency)



# Optional Development Goal Section

- Expand skill set
- Grow toward other opportunities
- Take on increased responsibilities within the Observatory
- Complete D&I trainings

Example:

Development Plan

Details Learning Activities Development Activities

Employee: Software Engineer Employee

Title: Learn more about the Agile process

Description: Watch Pluralsight Scrum/Agile development course: <https://app.pluralsight.com/library/courses/scrum-development-jira-agile/table-of-contents>

Self: N/A

Title: Related Competency: N/A Entered By: DAVID M WHITEHEAD

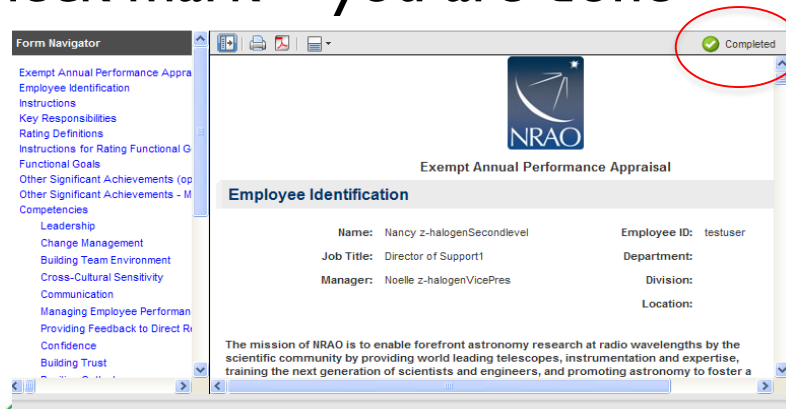
Add Development Activity



# Finished?

Once you've completed your goals and summary comments, **be sure you are done** then choose "Complete".

- Runs a Spell AND a Language check
- Locks you out of your self appraisal
- Pushes the appraisal to your supervisor
- Green check mark = you are done



The screenshot shows a web browser window displaying the NRAO Exempt Annual Performance Appraisal form. The form is titled "Exempt Annual Performance Appraisal" and includes a section for "Employee Identification". The "Completed" status is indicated by a green checkmark in the top right corner, which is circled in red. The form also includes a "Form Navigator" on the left side and a mission statement at the bottom.

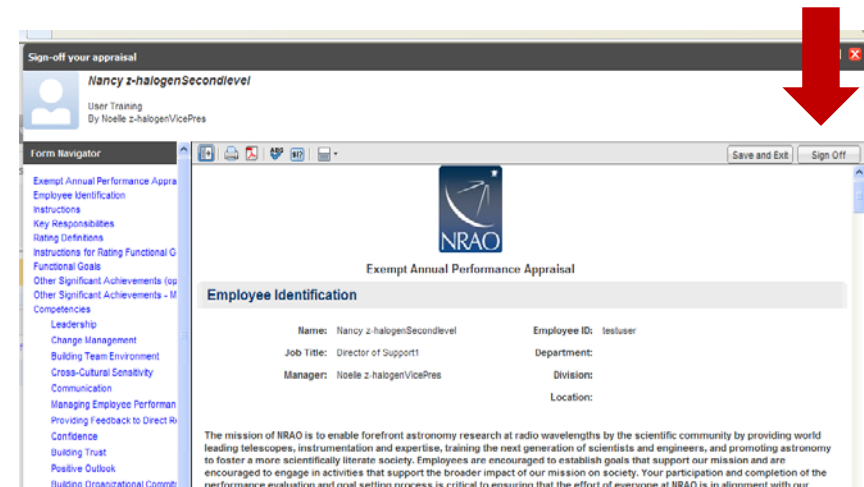
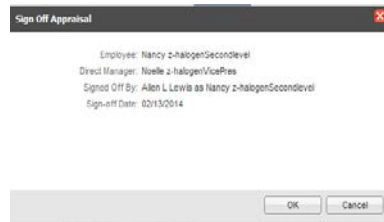
Employee Identification	
Name: Nancy z-halogenSecondlevel	Employee ID: testuser
Job Title: Director of Support1	Department:
Manager: Noelle z-halogenVicePres	Division:
	Location:

The mission of NRAO is to enable forefront astronomy research at radio wavelengths by the scientific community by providing world leading telescopes, instrumentation and expertise, training the next generation of scientists and engineers, and promoting astronomy to foster a



# Last Steps / Sign off

- Once your manager has completed your PEP, they will schedule a time to review it with you face-to-face
- After meeting, sign off on your PEP.
- Complete one last review of your appraisal.
- You can add additional “Summary Comments” if appropriate.
- Sign off by selecting “**sign off**”
- AND “OK” on pop up box.



# Other System Features

- **Profile:** Enter your education, professional development, certifications/licenses, professional memberships, skills. Review and update annually. Helpful for your manager and HR for development and workforce planning.
- **Feedback:** Journal Notes (note to self and can copy your manager) & Recognition (note to others in NRAO recognizing a good deed, will be seen by employee and their manager)
- **Document:** Can upload documents pertinent to your performance and development plans, they will be visible to your manager
- **Development Plans** – Optional development goals can be added. Development goals are used to expand your skill set and/or grow towards other opportunities.
- **Evaluations** – Access to past evaluations.



# Manager Notes

## New Goals for your staff

- Once your staff completes the self-appraisal, you will be tasked with writing evaluations.

Remember to:

- Review new goals submitted on your staffs' self-appraisal forms
- You may provide modified or different/additional goals into the fields provided.

- These goals migrate into your staff's personal page and into next year's PEP!
- Set (at least) quarterly check-in meetings to review process towards goals. Require staff to update process in Saba/Halogen.

