

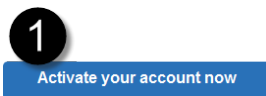


## Getting Started

### 1 Activating Your Account

You may be required to activate your account. An email will be sent to you with an activation link. Or, you use Internet Explorer to go to the site directly:  
<https://global.hgncloud.com/hollyspringsnc/welcome.html>.

Click the **Activate your account now** button in the activation email you received to access the Account Settings page and activate your account.



From the Account Settings page you will change your password and set your Security Questions.

Once you have completed the account activation you will be automatically logged into Halogen Performance.

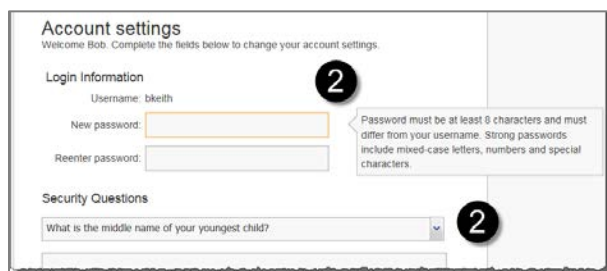
### 2 New Password and Security Question Requirements

When you change your password, the new password must contain:

- One or more letters (a-z, A-Z),
- Both upper and lower case letters,
- One or more numbers (0-9), and
- Minimum of 8 characters

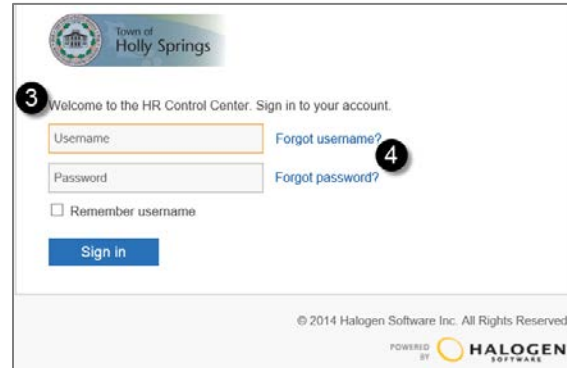
Your security question requirements include:

- Security questions and answers must be unique.
- Security answers must be a minimum of 4 characters.



### 3 Logging In

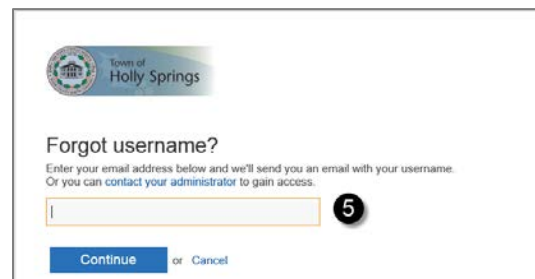
To log into the Performance system, type your Username and Password then click **Sign in** to be directed to your Home page.



### Forgotten Login Information

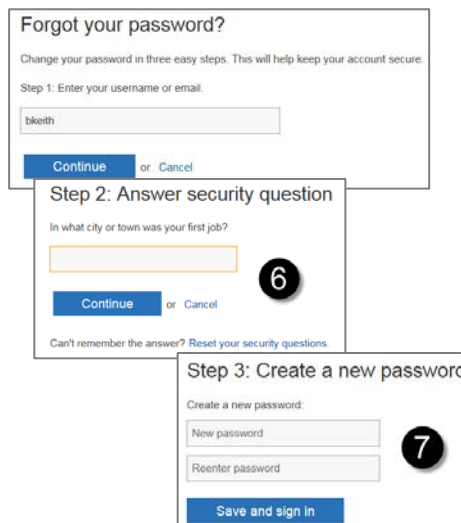
4 If you forget your username or password, you can retrieve your information by clicking the **Forgot username?** or **Forgot password?** link beside the login screen.

5 **Forgot username?**, enter your email address and click Continue. You will then receive an email with your Username.



6 **Forgot Password?**, enter your username, click **Continue** and answer the Security Question.

7 Enter and re-enter a **New Password**. Click the **Save and sign in** button. Your password will be changed and you will be signed into the system.





## Navigating the Home Page

When you login you will always be directed to your Home page. The Home page displays all of the features available to you, and it shows the tasks that you need to perform. The Home page has four main areas:

### 8 Navigation Bar

The Navigation Bar displays all the different sections that you can access. Your current location will always display in blue. In some sections, a secondary Navigation Bar will display with additional areas to view and manage information. Use the navigation bars to move around, instead of using your browser's **Back** button. This will reduce your chances of losing unsaved information.

### 9 My Tasks

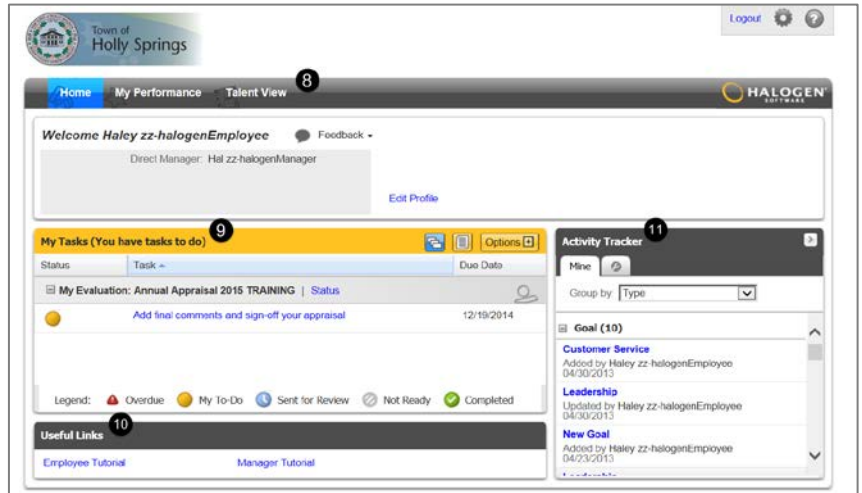
The My Tasks area displays an overview of tasks assigned to you. Tasks auto-populate when a previous task in the process is completed. Click the **Options** button to filter what displays in the My Task area.

### 10 Useful Links

At the bottom of the Home page you can click these links to be directed to additional resources and user-guides.

### 11 Activity Tracker

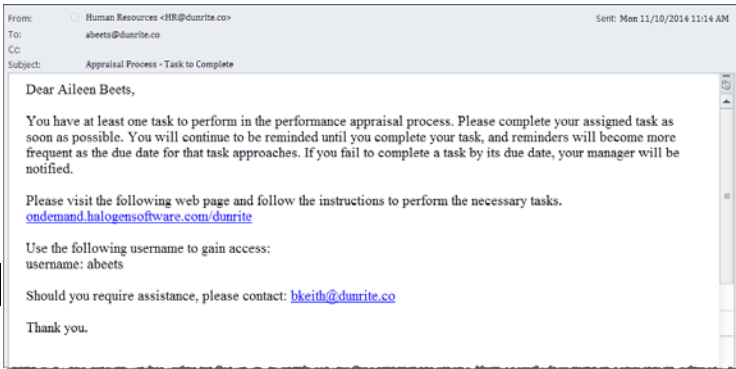
The Activity Tracker provides you with a quick way to view changes to your goals, development plans, feedback, and more.



## Completing a Task

### Notification Email

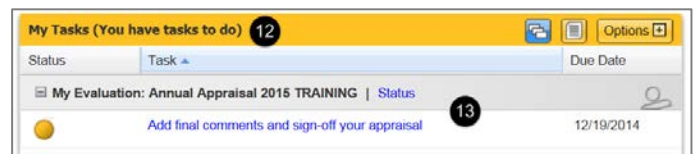
Whenever you have a task to complete, you'll receive a notification email from Halogen Performance telling you to open the module and complete your task.



### Opening Tasks and Status Icons

12 When you log in to Halogen Performance, you will see your Home page. On your Home page, the My Tasks area displays an overview of tasks assigned to you.

13 To open a task, click the name to access the task.



14 You will also see status icons associated with the tasks, and a legend outlining the meaning of each one.

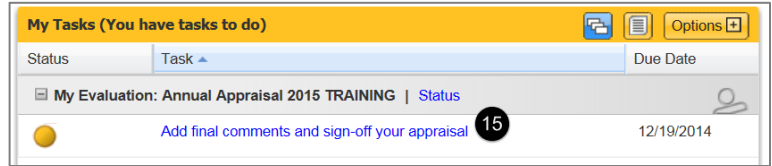




## Working with an Appraisal Form

### 15 Opening the Appraisal Form

From your Home page, click the **Add final comments and sign-off your appraisal** link.

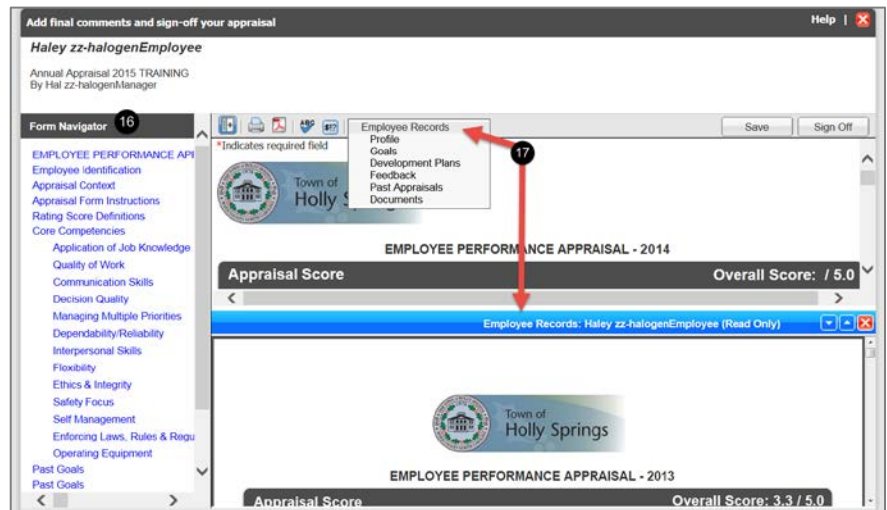


### 16 Viewing a Specific Section in the Form

Click the links in the **Form Navigator** to the left of the open appraisal form to jump to any section.

### 17 Split-screen

1. Click the **Split-screen** icon (☰) at the top of the form.
2. Select the item that you want to display.
3. The split screen window will open at the bottom of the form. Copy and paste or drag and drop information directly into the appraisal form if desired.
4. Click the red X to close the split screen.



## Saving vs. Completing the Form

- Click the **Save** button (Save) at the top of the form if you want to save a draft and return later to add additional content. The system will save your progress if you leave it open and do not touch it after 15 minutes.
- Click the **Complete** button (Complete) when you are finished working on the appraisal and are ready to move on to the next step of the process.

## Printing the Form

1. Click the **Print** icon (🖨) at the top of the form.
2. Select **Normal Print** or **Condensed Print**. **Normal Print** will print the form as it is shown on your screen, while **Condensed Print** will print a shorter, condensed version of the form.
3. To keep sections together on a page, deselect **Allow Sections** to break across pages.
4. Click **OK** when finished. The appraisal form will appear in a new browser window.
5. Print the appraisal form using your browser's function.



## Process Tasks

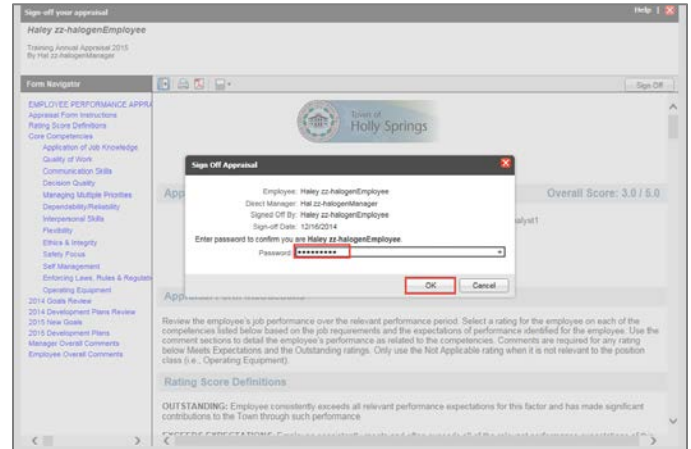
### Manager writes employee appraisals

Once your manager has completed their employees' appraisals, the appraisal status will be under approval until all approval levels are finished.

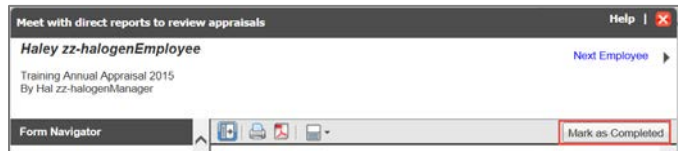
### Manager meets with employee & signs off appraisal

During your meeting with your manager, they will review and discuss your appraisal.

When ready, the manager will click the **Mark as Completed** button.

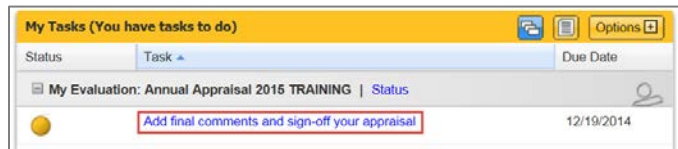


The pdf copy of the form will show as being completed on the top right of the screen, as well as on your Home page.




### Employee comments and sign-off

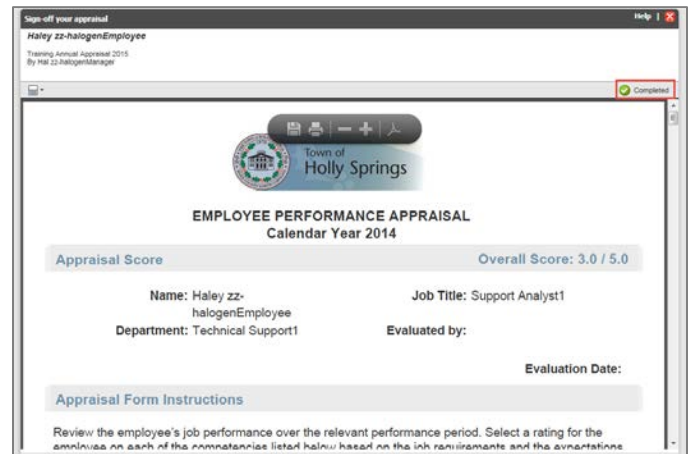
1. You will receive an email notification that you have a task to complete.
2. Once you login to the Halogen system, click the **Add final comments and sign-off your appraisal** link in the My Tasks area of your Home page.



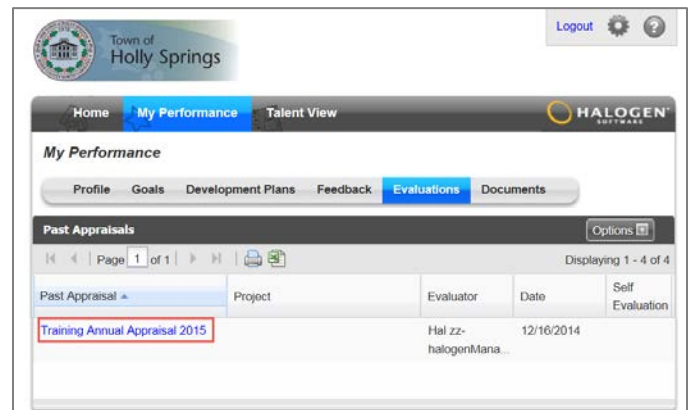
3. This opens the form. Review the appraisal and in the Employee Overall Comments section choose one of the following options; I agree with this evaluation / I do not agree with this evaluation question. You can also choose to add any optional comments.



4. Click the **Sign Off** button (  ) at the top of the form. Sign-off of the appraisal indicates that you have reviewed and the appraisal.
5. Enter your Halogen Password in the pop-up window, and then click **OK**.



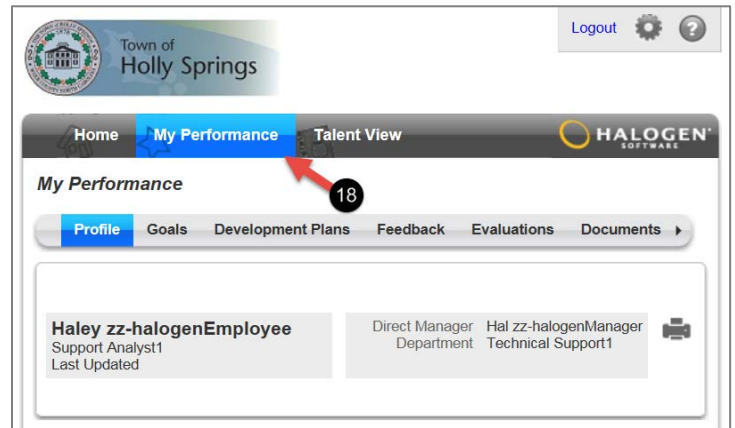
To view the signed off appraisal form, click on the My Performance tab and, the under the Evaluations tab, and click the **Annual Appraisal** link to open a pdf copy of the form.





## Interim Review & Ongoing Coaching (Performance Management)

**18** To access your performance, select a performance area from your My Performance area from the second navigation bar.



### Feedback and Notes

Feedback provides options to share information. Recognition is an acknowledgement of an achievement or a positive acclaim of performance that can be written by anyone.

A Journal Note is a statement or comment written by the employee.

You can add a Journal Note throughout the year and access them during your writing of the appraisal process.

#### To add new feedback or notes:

1. From the Feedback tab, click the **Add** button.
2. Make your selection.
3. Enter the recipient(s), as well as a title and description. Select the checkbox to make the journal note viewable by either your manager or by the employee.
4. Click **OK** when finished.

#### To modify an existing Journal Note:

1. Click the title link of the note.
2. Modify as necessary.
3. Click **OK** when finished

### Goals

#### To add a new goal:

1. From the Goals tab, click the **Add** button.
2. Enter a title and description.
3. Add a **Start** and/or **Due** date as necessary.
4. Click **OK** when finished.

#### To modify an existing goal:

1. Click the title link of the goal.
2. Modify the fields as necessary.
3. Click **OK** when finished.

#### To update the status of a goal:

1. Click the title link of the goal.
2. Update the Status, Percent Complete and/or Progress Flag.
3. Click **OK** when finished.

### Development Plan

#### To add a new development plan:

1. From the Development Plans tab, click the **Add** button.
2. Enter a title and description.
3. Add a **Start** and/or **Due** date as necessary.
4. Click **OK** when finished.

#### To modify an existing development plan:

1. Click the title link of the development plan.
2. Modify the fields as necessary.
3. Click **OK** when finished.

#### To update the status of a development plan:

1. Click the title link of the development plan.
2. Update the **Status** using the dropdown list.
3. Click **OK** when finished.