

Write your self-appraisal instructions - Minimum Requirements for Employee

This document provides an overview of the **minimum requirements** you will need to complete on your self-appraisal form. Supervisors/Managers or Program Directors determine their specific requirements for annual performance evaluations. You will receive instructions directly from your Supervisor or Program Director specifying their preferences. Be sure to read their instructions carefully so you include all required items.

STEP 1: Review the introductory e-mail you received on the e-Appraisal process regarding access to Halogen and use the method/link appropriate for your workstation to log on. Please use Internet Explorer (IE) and bookmark the site in your browser for future use. You may also e-mail hrappraisal@ameslab.gov if you have questions on the appraisal process. Single Sign On (SSO) has been deployed for Halogen, but if you are asked to log on, please use your **Ames Lab network user name and password**.

TIP: Click on the **Save** button frequently to safeguard your work while you are filling out the various sections of the appraisal. Do not click on **Complete** until you wish to submit your completed appraisal to your Supervisor. If you wish to stop work on your appraisal and come back to it at a later time, **Save** your work, then click on the Red "X" in the upper right hand corner of the Performance Evaluation form. You may return to work on your appraisal at any time by logging on and clicking on the **Write your self-appraisal** link again.

STEP 2: For instructions to access your current Position Description (PD) on the ISU system, click on the HELP link at the bottom of the Rating Scale section. **(Note: D and K base employees do not have a Position Description to access; please manually enter your duties)**. A second tab will open with instructions for logging into the ISU Classification and Hiring System. Copy and Paste each duty listed on your PD into your Performance Appraisal. For each duty, you must click one of the radio buttons specifying a rating. Your Supervisor/Manager or Program Director will instruct you on their preferences for completing the ratings. If you do not have eight (8) duties to list, please put N/A in the box and click the "not required" radio button to allow the duties to be scored correctly.

STEP 3: Answer yes (Y) or no (N) to the questions in the Position Description section and the License/Certification section. All answers of no (N) on PD accuracy will receive follow up by Human Resources after the appraisal process is completed for the year. All answers of yes (Y) in the license/certification require specifics.

STEP 4: Scroll down to the Goals section and add comments and completion information relative to meeting the goals set for the evaluation year.

If this is all your Supervisor/Manager or Program Director has required, **Save** your appraisal, then click on **Complete** to submit it to your supervisor. Both Spell Check and Grammar Check will run. Note: Once you click **Complete**, you will be unable to make any changes to the document and it will be routed to your supervisor. Click the red X to close the form and return to your Halogen page.

Attaching Documents

Your Supervisor/Manager or Program Director may instruct you to attach certain documents to your performance appraisal (list of significant accomplishments, current vitae, list of recent publications, etc.). From the Home page click on the My Performance tab, then the Documents tab. The screen below appears.

The screenshot shows the Halogen HR system interface. At the top left is the Ames Laboratory logo with the text 'THE Ames Laboratory Creating Materials & Energy Solutions U.S. DEPARTMENT OF ENERGY'. At the top right are links for 'HR Admin Control Center', 'Logout', 'Contact', 'Help', and 'Restore Defaults'. The main navigation bar has 'Home', 'My Performance', and 'Directory' tabs. Below this is the 'My Performance' section with sub-tabs for 'Profile', 'Goals', 'Development Plans', 'Journal Notes', 'Evaluations', and 'Documents'. A notice states 'Your personal upload limit is 10 MB.'. The 'Documents' section features 'Add', 'Delete', and 'Options' buttons. Below is a table with columns for 'Document', 'File Size', and 'Date'. The table contains one entry: '2011 Training' with a file size of '36 KB' and a date of '01-27-2012'. The interface also shows 'Page 1 of 1' and 'Displaying 1 - 1 of 1'.

The current year Training document is the summary of your safety training needs based on the Cybertrain system at the time HR initiates the current review process. Please leave all documents in place so your supervisor can review your current training with you at the time they conduct the face-to-face review. Use the **Add** button to add new documents. Be sure to use a naming convention which allows you to easily identify your documents. The list will grow over time, so you should include the year in the document name to help identify the most current documents. Low or Moderate users utilizing sPortal2 should consult the instructions for uploading documents posted on the IS webpage at: <http://www.ameslab.gov/operations/is/faq/how-do-i-transfer-file-low-enclave-moderate-enclave>

Once you are finished adding your documents, you may log out of the Halogen system. If you accessed Halogen through Sportal2, be sure to log off of that server also.

Halogen 911

If you have questions or issues with the Halogen system, please don't hesitate to e-mail hrappraisal@ameslab.gov or call 4-2680. HR staff members receive these e-mails and will be able to assist you.