

## **A & R Non-Clinical Staff Review Process Instructions-Fall 2018**

Process Overview.....	Page 2
Halogen Access Instructions from UMMC Network.....	Page 3
Process Instructions.....	Page 5
Items Contained in Non-Clinical Appraisal Form.....	Page 8
Access Instructions from Citrix (outside of UMMC network).....	Page 9
Additional Info for PC's Running Windows 8 or 10.....	Page 14
Locating Employee's Job Description.....	Page 15

## **Process Overview**

Process Begins November 1, 2018 and closes January 31, 2019

Process Administered through Halogen Performance Management System

### **Process Steps:**

Preparatory Work: Employee and Evaluator collects performance-related information for lookback period (goals, development plans, accomplishments, accolades, coaching opportunities, disciplinary documents, etc.)

Employee and Evaluator References Job Description to ensure accuracy of contents to day-to-day work. If questions or concerns, contact HRBP immediately. Employee and Evaluator should also participate in trainings prior to completion of tasks. [\(Click here to access information.\)](#)

Step 1) Employee Writes Self-Appraisal in Halogen

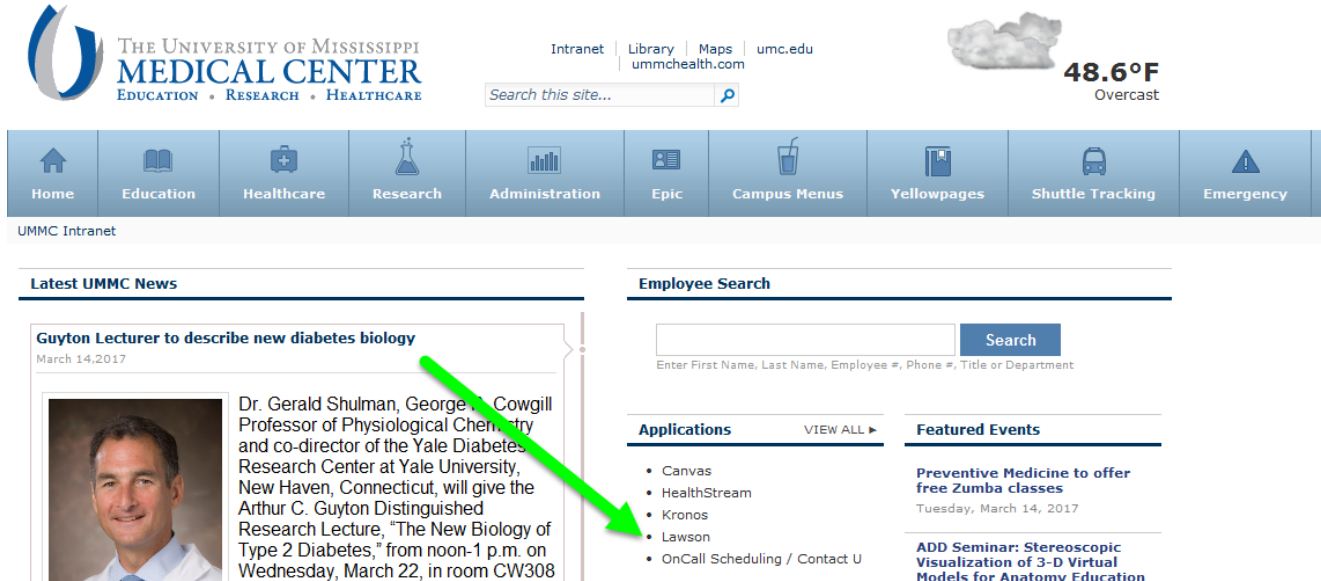
Step 2) Evaluator writes Appraisal and Discusses with Employee

Step 3) Employee Chooses Agree or Disagree and Signs-Off on Review

Step 4) Evaluator Makes Final Comments and Signs-Off on Review

## Halogen Access Instructions

### 1. Go to UMMC Intranet:



THE UNIVERSITY OF MISSISSIPPI  
**MEDICAL CENTER**  
EDUCATION • RESEARCH • HEALTHCARE

Intranet | Library | Maps | umc.edu  
ummchealth.com

Search this site...

48.6°F  
Overcast

Home Education Healthcare Research Administration Epic Campus Menus Yellowpages Shuttle Tracking Emergency

UMMC Intranet

**Latest UMMC News**

**Guyton Lecturer to describe new diabetes biology**  
March 14, 2017

Dr. Gerald Shulman, George W. Cowgill Professor of Physiological Chemistry and co-director of the Yale Diabetes Research Center at Yale University, New Haven, Connecticut, will give the Arthur C. Guyton Distinguished Research Lecture, "The New Biology of Type 2 Diabetes," from noon-1 p.m. on Wednesday, March 22, in room CW308

**Employee Search**

Search

Enter First Name, Last Name, Employee #, Phone #, Title or Department

**Applications** VIEW ALL ▶

- Canvas
- HealthStream
- Kronos
- Lawson
- OnCall Scheduling / Contact U

**Featured Events**

**Preventive Medicine to offer free Zumba classes**  
Tuesday, March 14, 2017

**ADD Seminar: Stereoscopic Visualization of 3-D Virtual Models for Anatomy Education**

### 2. Enter UMMC username and password

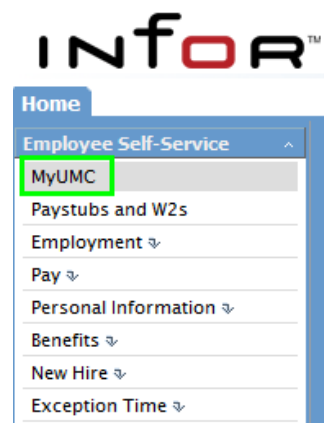


**LAWSON**

User Name

Password

### 3. Select Employee Self-Service, My UMC Bookmarks



**INFOR™**

Home

Employee Self-Service

**MyUMC**

Paystubs and W2s

Employment ▾

Pay ▾

Personal Information ▾

Benefits ▾

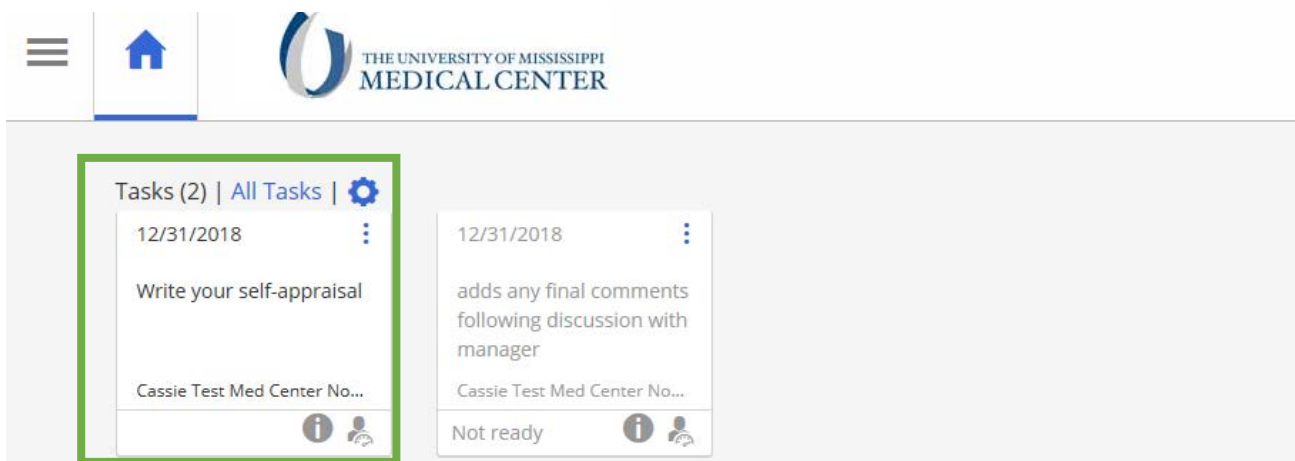
New Hire ▾

Exception Time ▾

#### 4. Select Halogen icon



#### 5. Locate Tasks on Halogen Home Page



## Process Instructions

### Step 1: Employee Completes Self-Appraisal Performance Review in Halogen

1a. Employee will receive Halogen Performance Management System Helper email ([helper@umc.edu](mailto:helper@umc.edu)) alerting of task ready to be completed in Halogen



Dear Recipient,

You are receiving this notification because you have at least 1 task assigned to you in Halogen as part of the 2018 Staff Evaluation Process. Thank you in advance for your participation in this important process.

If you have not yet done so, you may sign up for Halogen **Open Lab Trainings** which you should see in your [HealthStream](#) account. **Please complete this training prior to beginning your self-evaluation since it describes changes to the process and should address the most frequently asked questions.**

If you do have questions or concerns after completing the training, for quickest reply please send an email to [HR-Academic&Research@umc.edu](mailto:HR-Academic&Research@umc.edu) and include as much detail as possible. Your inquiry will be addressed as quickly as possible by one of the HR Academics and Research team members. Due to the large volume of inquiries, we do appreciate your patience as we respond to each inquiry as immediately as possible.

As a helpful reminder, the **steps**/tasks in the process are listed below. All steps must be completed by January 31, 2019.

Step 1) Employee Writes Self-Appraisal in Halogen


Step 2) Evaluator writes Appraisal and Discusses with Employee

Step 3) Employee Adds Final Comments and Signs-Off on Review


Step 4) Evaluator Reviews Final Comments and Signs-Off on Review

1b. Employee navigates to Halogen using access instructions and opens Task

1c. Employee completes employee's self-appraisal form. Use save button as needed to save entries and return to Halogen to complete task at a later date. Once satisfied with entries, click Submit.




**Sonny Employee**  
Cassie Test Med Center Non-Clinical Staff  
By Sonny Employee



Save

Submit



THE UNIVERSITY OF MISSISSIPPI  
MEDICAL CENTER  
EDUCATION • RESEARCH • HEALTHCARE

**Academics, Research, and Service Areas: Nonclinical Staff Evaluation Cycle Fall 2018**

**Employee Identification**

Employee Name:	Sonny Employee	Evaluator's Name:	Brasfield
Employee ID:	EMPLOYEE24		
Job Code:			
Job Title:			
Department Name:			
Department #:			

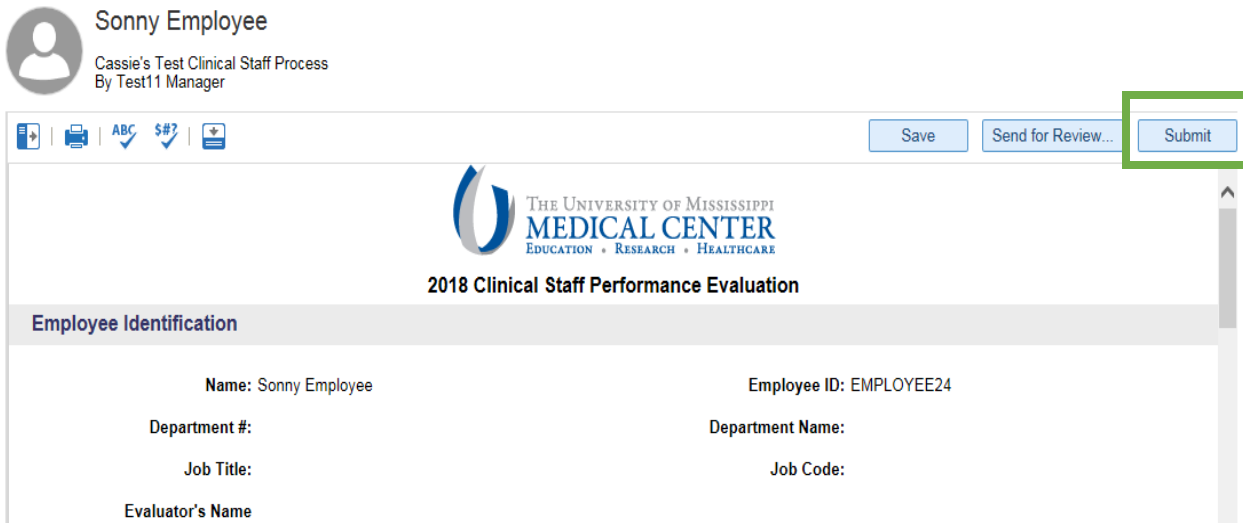
## Step 2: Evaluator Reviews Employee Self-Appraisal and Completes Manager Appraisal

2a. Evaluator will receive Halogen Performance Management System Helper email ([helper@umc.edu](mailto:helper@umc.edu)) alerting of task ready to be completed in Halogen



2b. Evaluator navigates to Halogen using access instructions, opens Task

2c. Evaluator completes employee's evaluation form, and saves button as needed to save your entries and return to Halogen to complete tasks at a later date. Use the Send for Review button to send draft to other leader for feedback. Once satisfied with entries, click Submit.

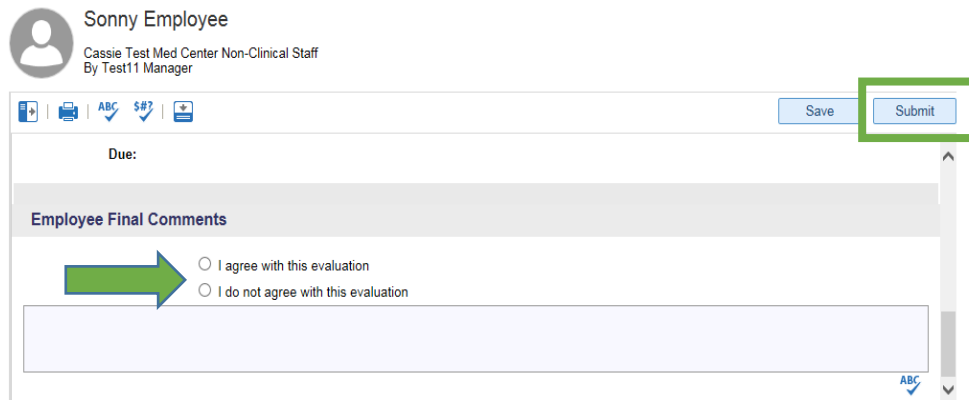


The screenshot shows the Halogen Performance Management System interface. At the top left, there is a user profile for "Sonny Employee" with the text "Cassie's Test Clinical Staff Process" and "By Test11 Manager". To the right of the profile are three buttons: "Save", "Send for Review...", and "Submit". The "Submit" button is highlighted with a green box. Below the buttons is the University of Mississippi Medical Center logo and the text "2018 Clinical Staff Performance Evaluation". The main section of the form is titled "Employee Identification" and contains the following fields: "Name: Sonny Employee", "Employee ID: EMPLOYEE24", "Department #:", "Department Name:", "Job Title:", "Job Code:", and "Evaluator's Name".

2d. Evaluator meets in person with employee and conducts performance discussion.

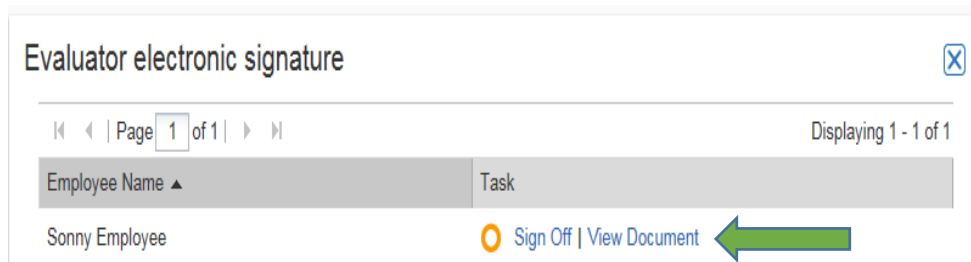
### Step 3. Employee Chooses Agree or Disagree and Signs-Off on Review

Once Evaluator meets in person with employee and conducts performance discussion, employee opens task, makes any final comments and chooses to agree or disagree with evaluation, and clicks Sign Off. If employee selects do not agree, a notification will be send to the HRBP who will be in contact to provide consultation

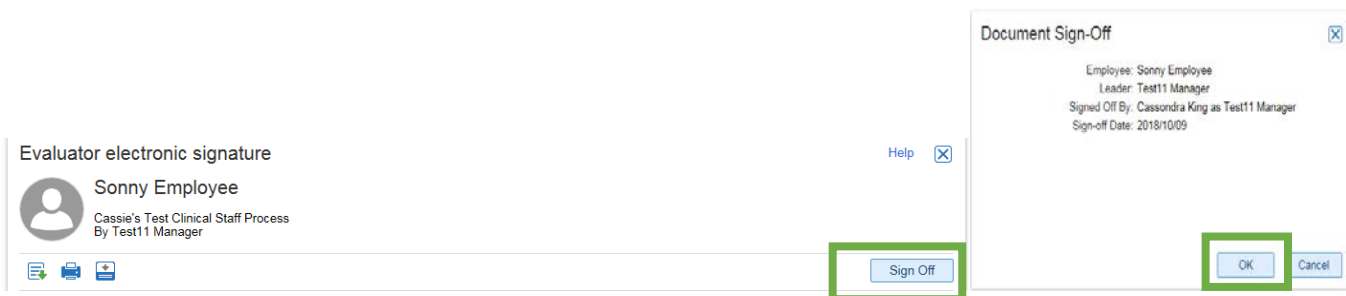


### Step 4: Evaluator Makes Final Comments and Signs-Off on Review

4a. Evaluator navigates back to Halogen using access instructions, clicks View Document to review employee's comments



4b. Evaluator clicks Sign Off to conduct final Document Sign-Off. Evaluator will have an opportunity to save or print a PDF version of the review.



## **Items Contained in Non-Clinical Appraisal Form**

Academics, Research, and Service Areas: Nonclinical Staff Evaluation Cycle Fall 2018

### Employee Identification

Employee Name:  Evaluator's Name:   
Job Title:

Describe overall performance during lookback period:

Describe successes in the performance lookback period:

Describe workplace frustrations that impacted performance during lookback period:

Employee's work-related goals for coming performance period:

- 1.
- 2.
- 3.

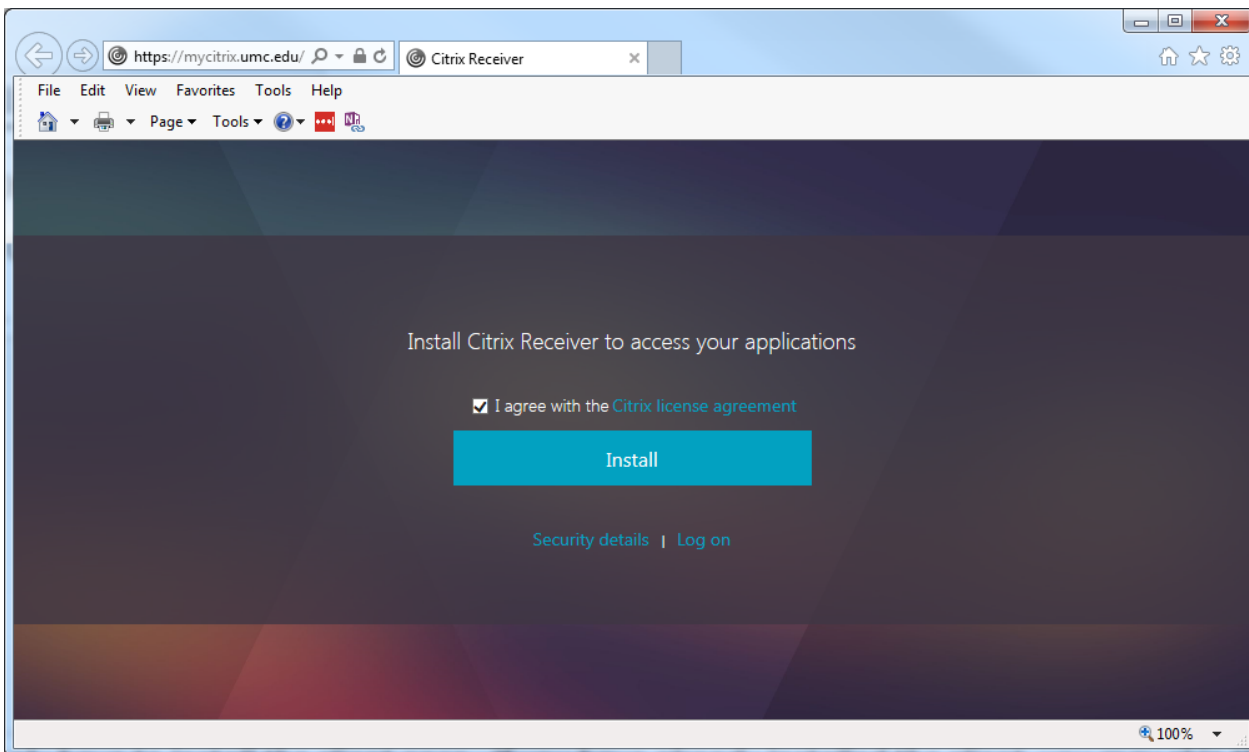
Describe how manager can help support employee to achieve goals over the next performance cycle:



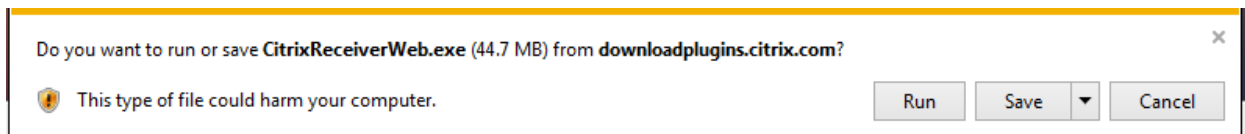
## Accessing Lawson via Citrix

1. Externally or Internally (including Public Wi-Fi) - <https://mycitrix.umc.edu>
2. [Installing Citrix Receiver client](#)

If the Citrix StoreFront web portal does not detect a Receiver client on your PC, then you will be prompted to install the client. Click the checkbox next to *I agree with the Citrix license agreement* and then click the **INSTALL** button.



3. Click the **RUN** button when you see the following popup box:



4. Click the **START** button on

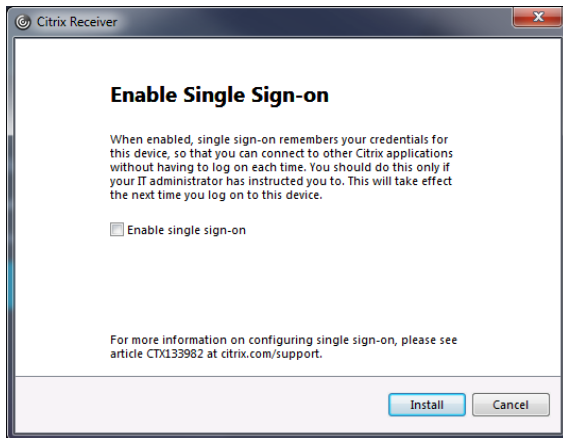
this window to continue:



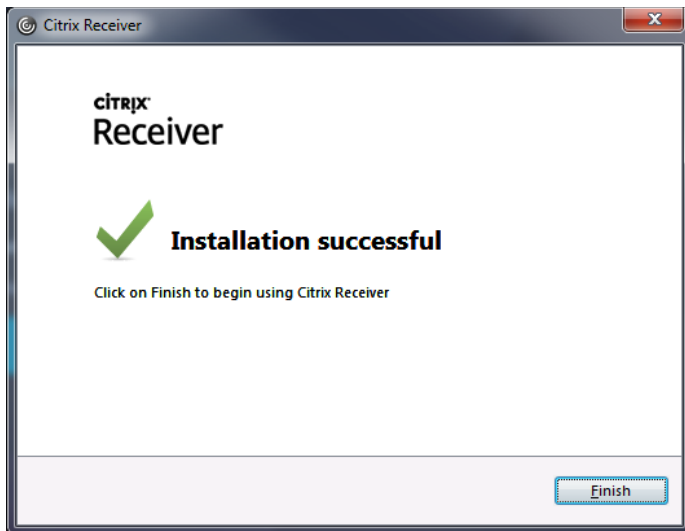
5. Click the checkbox beside I *accept the license agreement* and then click the **NEXT** button:



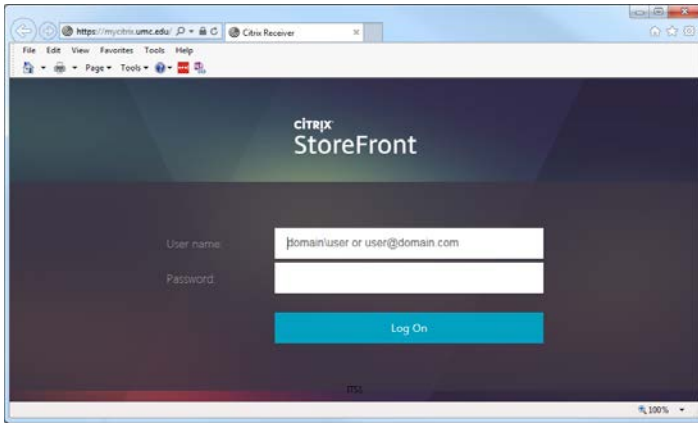
6. Click the **INSTALL** button:



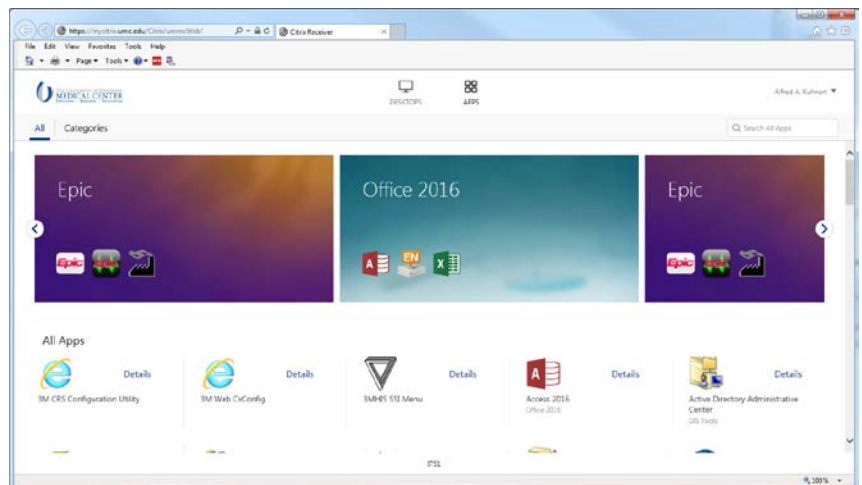
7. When the installation finishes, you will see the following popup box. Click on the **FINISH** button.



8. Now the Citrix StoreFront web portal should look like this:

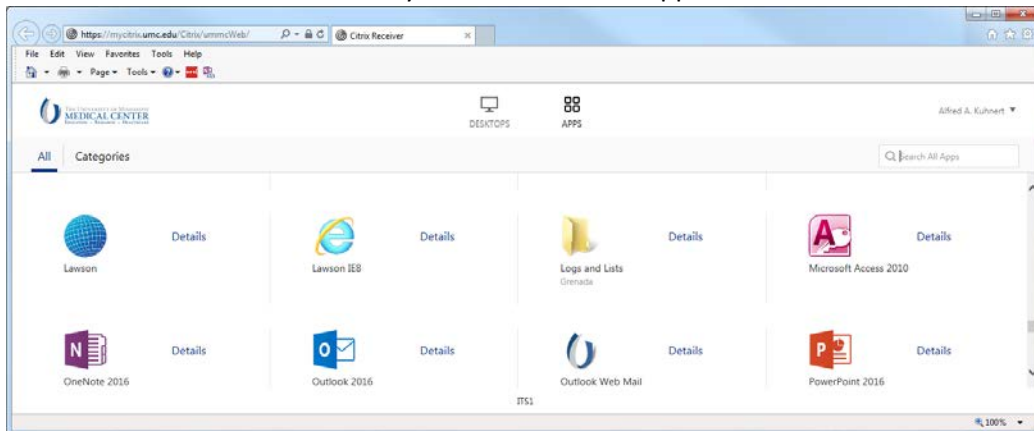


9. Enter your network username and password, and then click the **LOG ON** button.

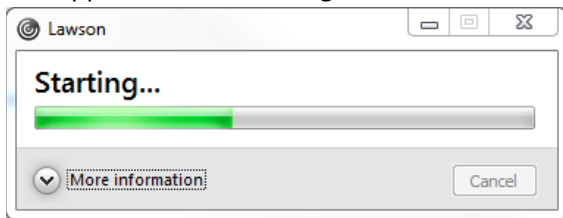


You will see all the Citrix apps assigned to you:

10. Scroll down if necessary to see the Lawson app and then click on **LAWSON**:



The app will start launching:



11. Enter your network username and password, and then click the button:



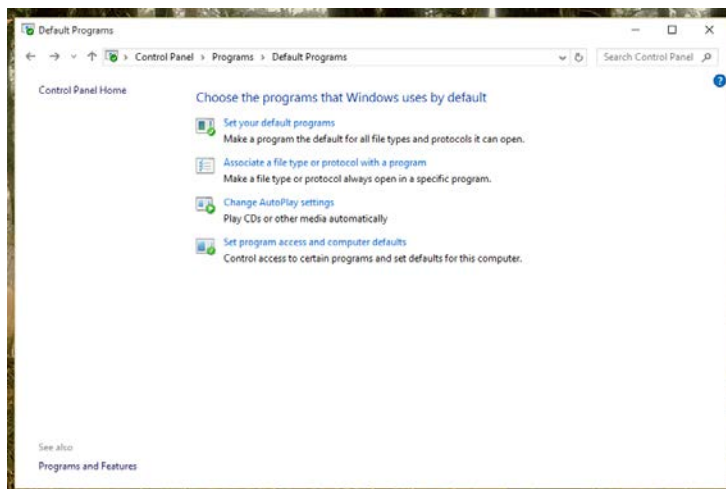
## **Additional Info for PCs Running Windows 8 or Windows 10**

Issue: *Windows 8/10 PC cannot launch Citrix apps ..... Windows says it cannot open the app's associated .ICA file*

What causes this problem: There are two common causes. Either the PC does NOT have a Citrix Receiver client installed, OR the Windows 8/10 operating system failed to set the correct application to open .ICA files.

What to do:

- 1) Confirm that the PC has a Receiver client installed and is version 4.4 or newer. You should see the Receiver icon in the System Tray on bottom right of screen. If the client is not present, goto [www.citrix.com](http://www.citrix.com) and download and install the latest Windows Receiver.
- 2) Confirm that the PC has the correct app assigned to open .ICA files.
  - a) Open the Windows 10 **Control Panel**
  - b) Click on **Programs** and then click on **Default Programs.**
  - c) **Click on Associate a file type or protocol with a program.**
  - d) Find the **.ica file** type in the Name column and click on it. [Note: Some PCs are trying to use Internet Explorer to launch the .ica files despite having Citrix Receiver installed. The removal and reinstallation of Receiver clients will not resolve the incorrect file type setting.]

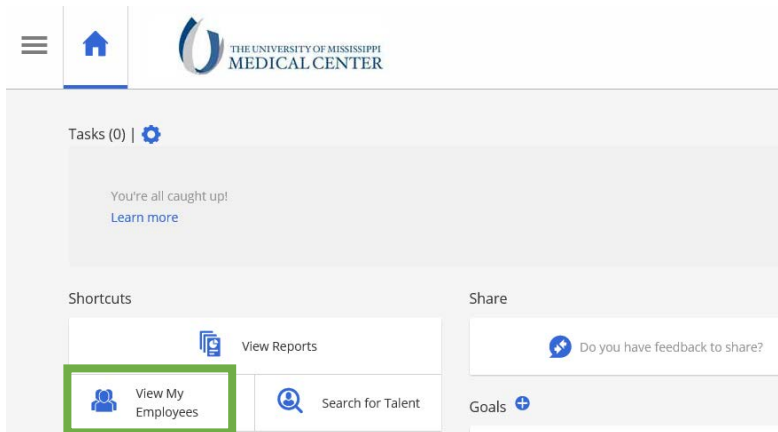


## Locating Employee's Job Description

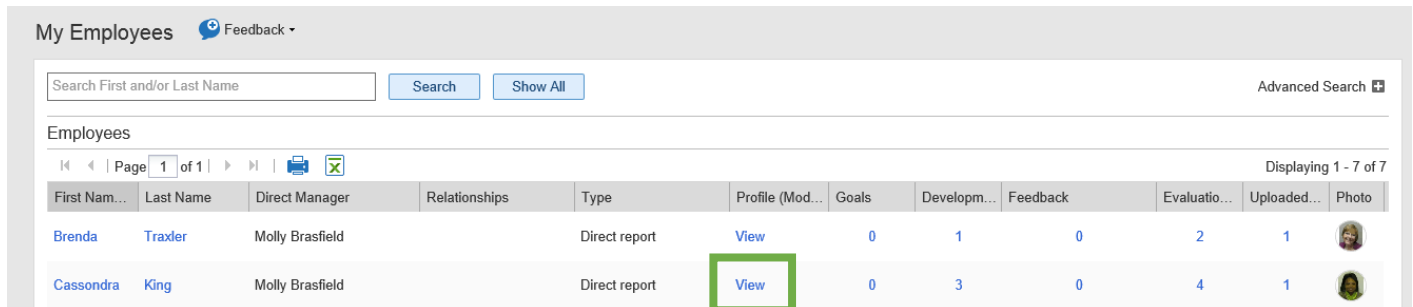
### 1. If you're the Evaluator:

1a. Using Lawson and Halogen access instructions, open Halogen Performance Management System

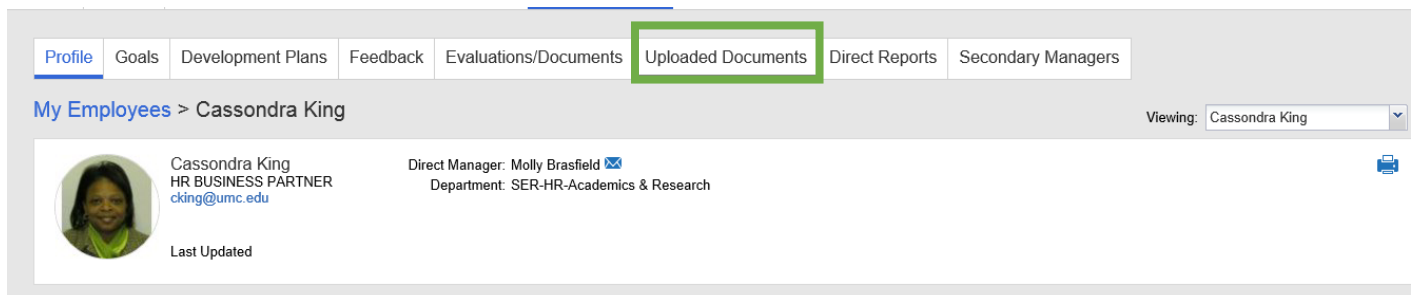
1b. From Halogen Home Page, click on View Reports



1c. For applicable employee, under Profile column, click View.



1d. From next window, Click on Uploaded Documents



## 1e. Click Profile Details

Profile Goals Development Plans Feedback Evaluations/Documents Uploaded Documents Direct Reports Secondary Managers

My Employees > Cassandra King Viewing: Cassandra King


Uploaded Documents Add Delete Options

Page 1 of 1

Document	Date
<a href="#">Profile Details</a>	2011/09/14

## 1f. Click "Click here to view job description(s)"

**Cassandra King**



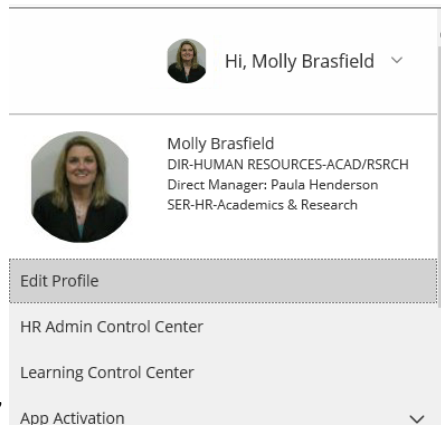
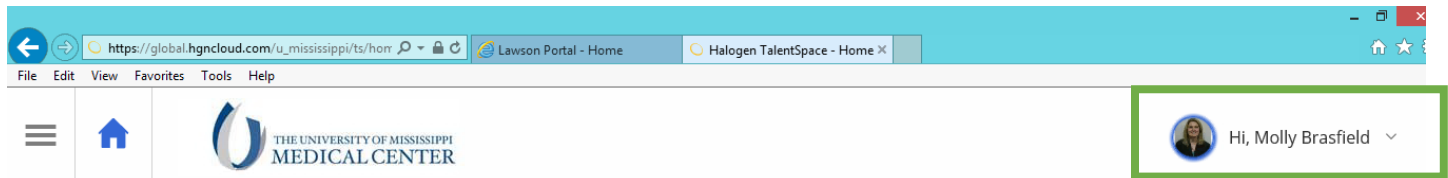
[Click here to view HealthStream profile](#)  
[Click here to view job description\(s\)](#)



## 2. If you're the Employee:

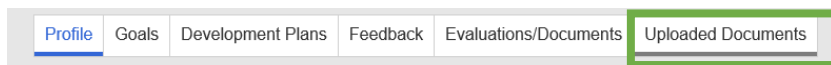
2a. Using Lawson and Halogen access instructions, open Halogen Performance Management System

2b. From Halogen Home Page, click on “Hi, (Your Name)”



2c. From dropdown menu, Select “Edit Profile”

2d. Select Uploaded Documents



2e. Select Profile Details

Page 1 of 1

Displaying 1 - 4 of 4

Document	File Size	Date
<a href="#">Certificate of Appreciation</a>	96 KB	2017/08/10
<a href="#">Letter of Appreciation</a>	43 KB	2017/08/10
<a href="#">Profile Details</a>	97 KB	2018/09/27

**MOLLY BRASFIELD**



2f. Click “Click here to view job description(s)” [Click here to view HealthStream profile](#)  
[Click here to view job description\(s\)](#)