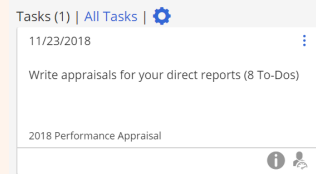


## INSTRUCTIONS FOR COMPLETING THE PERFORMANCE APPRAISAL

Log on to Halogen. Your Home page shows you have a task to do.

Click on the task.



Then click on Edit Form to open the performance appraisal.

### Instructions

- Schedule performance appraisal meetings with each of your direct reports and encourage them to complete a self-appraisal at least one week prior to the meeting.
  - Complete the Performance Appraisal form, using the self-appraisal for input.
  - Save the Performance Appraisal as a Draft (**Save as Draft**).
  - With a printed copy of the Performance Appraisal, meet with each employee to review, discuss and finalize their Performance Appraisal.
  - After the appraisal meeting, make any necessary changes to the Performance Appraisal and save it (**Save and Submit**).
- NOTE: After you "Save and Submit" you will not be able to see the Performance Appraisal form in Halogen until your direct report completes the final "Sign off" step in Halogen. It will then appear in My Employees > Forms.

[Step-by-step instructions](#) for completing the Performance Appraisal form.

### Employee Sign-off

This is the final step in the Performance Appraisal process. Please review the appraisal, add your comments in the Employee Comments section (optional), and click the "Sign off" button located at the bottom of the form. Once you sign-off, your Performance Appraisal will be saved in My Performance > Forms.




## PerformMinneapolis

### Annual Performance Appraisal

#### Employee Identification

Name:  Job Title:   
Department:  Supervisor:

#### Evaluation Period

Evaluation Date:    
Review Period: From:   To:  

#### Self-appraisal

All employees are given the opportunity to complete a self-appraisal.  
If this employee has completed a self-appraisal, it will show up in My Employees > Forms.

- I have reviewed the self-appraisal for this employee.
- This employee did not complete a self-appraisal

 [Attach Feedback](#)

#### Overview

The performance appraisal process provides a summary of progress toward meeting performance expectations and an assessment of job success factors. The Overall Rating is based on the combination of BOTH Work Expectations and Job Success Factors.

#### Evaluating Work Expectations

Evaluate work expectations by selecting one of these ratings: Meets, Does Not Meet

Describe accomplishments with respect to each expectation. Provide information about how the standard(s) were met or not met.

##### Meets

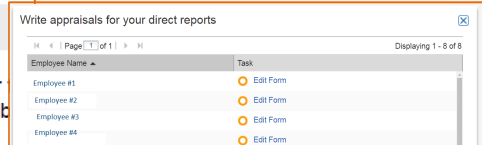
Solid performer. Meets or exceeds the standards set. May occasionally miss a standard. Shows consistent performance during the appraisal period. Fully acceptable performance.

##### Does not meet

Does not meet the standards set. May occasionally meet standards but not consistently. Cannot be counted on to complete work assignments. Improvement is required.

##### Not Applicable

Select this only when there was agreement not to work on the expectation during the evaluation period.



Employee Name	Task
Employee #1	<a href="#">Edit Form</a>
Employee #2	<a href="#">Edit Form</a>
Employee #3	<a href="#">Edit Form</a>
Employee #4	<a href="#">Edit Form</a>

#### Read the Instructions.

Fill in the evaluation date and the evaluation period.

**Acknowledge that you have reviewed this employee's self-appraisal.**

#### Read the Overview

**Read about Evaluating Work Expectations.**

## Work Expectations

### Major Job Duty



Outcome #1  
Outcome #2  
Outcome #3

Rating:

Standard

Accomplishments

Standard #1  
Standard #2  
Standard #3

Attach Feedback

Add additional Work Expectation

ABC

Major Job duties, outcomes and standards entered during expectation-setting will pre-populate into the form.

There should be 3 – 5 expectations.

You can edit goals if necessary. Discuss this with your employee.

Rate each Work Expectation (Meets, Does Not Meet or Not Applicable)

Enter accomplishments that help explain the rating.

## Evaluating Job Success Factors

The six Job Success Factors below apply to all City employees. Rate yourself on each of the factors listed.

### Exceeds (Outstanding Contribution)

Performance in this Job Success Factor consistently exceeds expectations in all areas of responsibility. The employee frequently models this Job Success Factor.

### Meets (Valued Contribution)

The employee consistently demonstrates solid performance in this Job Success Factor. The employee models this Job Success Factor.

### Does not meet (Needs Improvement)

Performance in this Job Success Factor does not consistently meet position requirements. Immediate improvement is needed.

Please reference the [Job Success Factors - Rating Guide](#) for additional information about the Job Success Factors.

Please reference the [Job Success Factors - Rating Guide](#) to assist in selecting the appropriate rating for each Job Success Factor.

## Job Success Factors

	Ratings Scale	Comments:
<b>Customer Focus</b> Meets the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; establishes and maintains effective relationships with customers and gains their trust and respect.	<input type="text"/> <input type="button" value="v"/>	

Read how to rate each of the Job Success Factors.

Download the Job Success Factor – Rating Guide

Rate each of the 7 Job Success Factors.

**Functional/Technical Skills and Job Skills**  
Has the functional and technical knowledge and skills to do the job.



**Quality of Work Output**  
The quality of goods and services produced in terms of errors, waste, and rework required to meet standards.


  


**Productive Work Habits**


You **are required** to add a comment for each Factor.

If you need ideas, click on .

When you click on , the comment will default to Meets.

You need to slide the scale to see other levels of comment.

**Suggested Comments**

Employee:  
Competency: Customer Focus


**Performance Comment**

Select a category below and then adjust the comment level and nuance for the selected category.

**Service Delivery**  
Customer expectations  
Seeks input from customers  
Gains the customers trust

Employee's Gender:  Male  Female

Comment Level: **Meets**

Nuance: 

Suggested Comment:  
(Name) can generally recognize all the City's various stakeholders (e.g., residents, business owners, etc.) as customers. He/She demonstrates cultural sensitivity, courtesy, empathy and respect when interacting with customers. (Name) leaves a positive impression in interactions with customers. (Name) recognizes City employees as internal customers. He/She provides

Your Comment:

 Attach Feedback

**Supervisor's Overall Rating and Comments (based on Expectations and Job Success Factors)**

The Overall Rating is based on the combination of **BOTH Work Expectations and Job Success Factors**.  
The relative weight and importance of work expectations and job success factors are determined by the supervisor. The Overall Rating is **NOT** an average of the above ratings since some performance areas may be more significant than others.

Ratings Scale

Read the instructions. Enter an overall rating (Exceeds, Meets, Does Not Meet)

 Attach Feedback

**Overall Comments**

Add Overall Comments

**STOP HERE**

## Employee Comments

Employee may add final comments about their performance for this review period.



## Employee Disclaimer

*I have reviewed this document. My electronic signature means that I have been advised of my performance and does not necessarily imply that I agree with the appraisal.*

## Saving the Form

There are two save options that appear above the form.

- 1) If you have not completed the form and would like to continue editing it at a later time, click "**Save as Draft**".
- 2) If you have completed the form and do not need to make additional edits, click "**Save and Submit**".

**NOTE:** If you try to print this form before saving, the form will be blank. You must do **Save as Draft** before printing the form.

## Saving the Form

Once you have reviewed the appraisal and added your final comments (optional), click "**Sign off**" which is found above the form.

The completed appraisal can then be viewed and/or printed by going to My Performance > Forms.

**Save as Draft**

Press **Save as Draft** at the top of the form if you need to working on it.

**Save and Submit**

Press **Save and Submit** at the top of the form if you have completed the form and have no additional edits.

**Save and Submit**

Once you **Save and Submit** the form goes to you employee for comments and electronic signature.

Print a PDF copy for yourself.