

A & R Clinical Staff Review Process Instructions-Fall 2018

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Process Overview

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

Process Administered through Halogen Performance Management System

Process Steps:

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

Employee and Evaluator should also participate in trainings prior to completion of tasks. ([Click here to access information.](#))

Step 1) Evaluator Completes Performance Review in Halogen

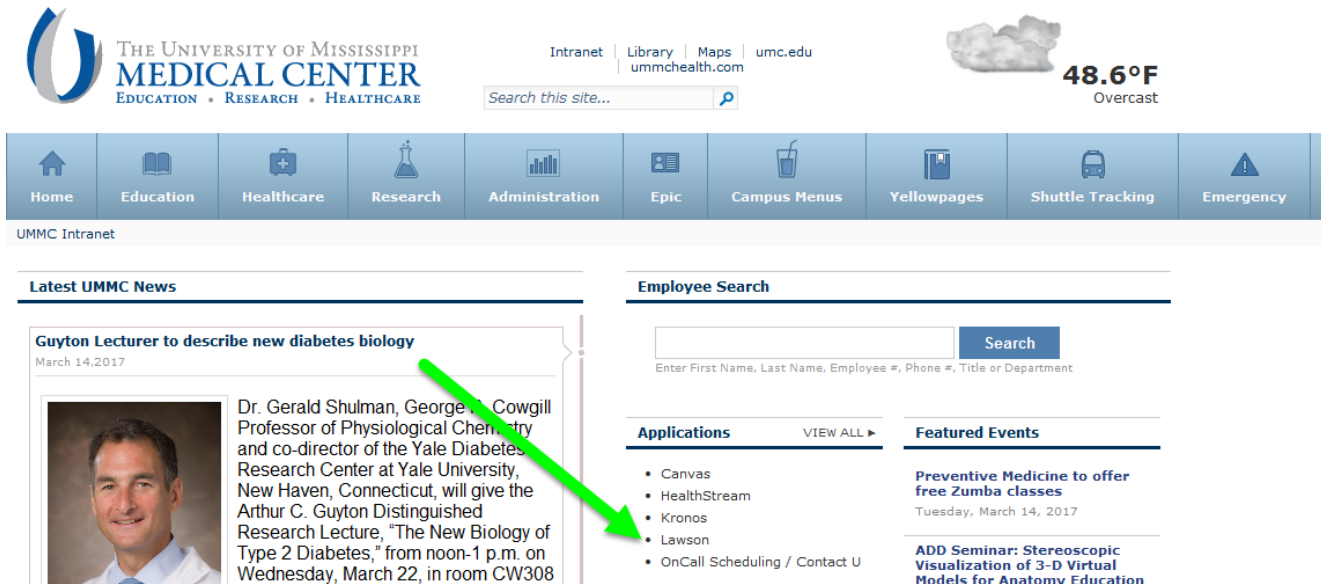
Step 2) Evaluator Meets with Employee and Discusses Review

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

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

Halogen Access Instructions

1. Go to UMMC Intranet:



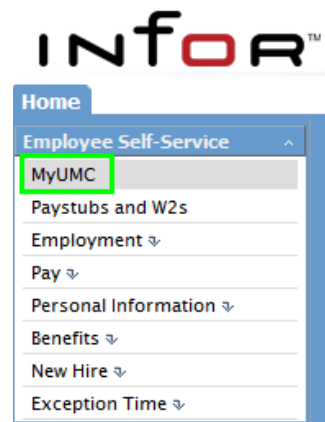
The screenshot shows the UMMC Intranet homepage. At the top left is the UMMC logo and name. To the right are links for Intranet, Library, Maps, and umc.edu. A search bar is present with the text "Search this site...". On the far right, there is a weather widget showing a cloud icon, "48.6°F", and "Overcast". Below the header is a navigation bar with icons and labels for Home, Education, Healthcare, Research, Administration, Epic, Campus Menus, Yellowpages, Shuttle Tracking, and Emergency. Underneath the navigation bar is a "Latest UMMC News" section featuring a news item titled "Guyton Lecturer to describe new diabetes biology" dated March 14, 2017. A green arrow points from this news item towards the "Employee Search" section. The "Employee Search" section includes a search input field and a "Search" button. Below the search field are two columns: "Applications" with a "VIEW ALL" link and a list of items (Canvas, HealthStream, Kronos, Lawson, OnCall Scheduling / Contact U), and "Featured Events" with two event listings: "Preventive Medicine to offer free Zumba classes" and "ADD Seminar: Stereoscopic Visualization of 3-D Virtual Models for Anatomy Education".

2. Enter UMMC username and password



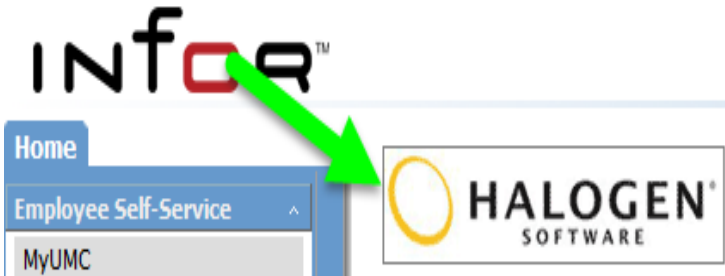
The screenshot shows the Lawson login page. It features the "LAWSON" logo at the top. Below the logo is a login form with two input fields: "User Name" and "Password".

3. Select Employee Self-Service, My UMC Bookmarks



The screenshot shows the Infor application menu. At the top is the "INFOR" logo. Below it is a "Home" button. A dropdown menu is open, showing "Employee Self-Service" with a sub-menu. The "MyUMC" option is highlighted with a green box. Other options in the dropdown include "Paystubs and W2s", "Employment", "Pay", "Personal Information", "Benefits", "New Hire", and "Exception Time".

4. Select Halogen icon



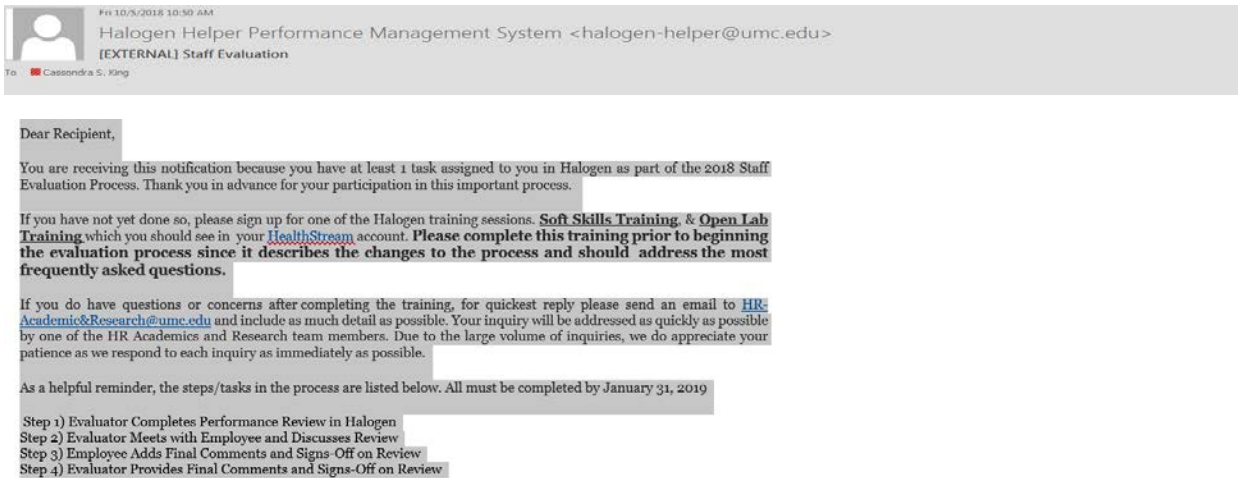
5. Locate Tasks on Halogen Home Page



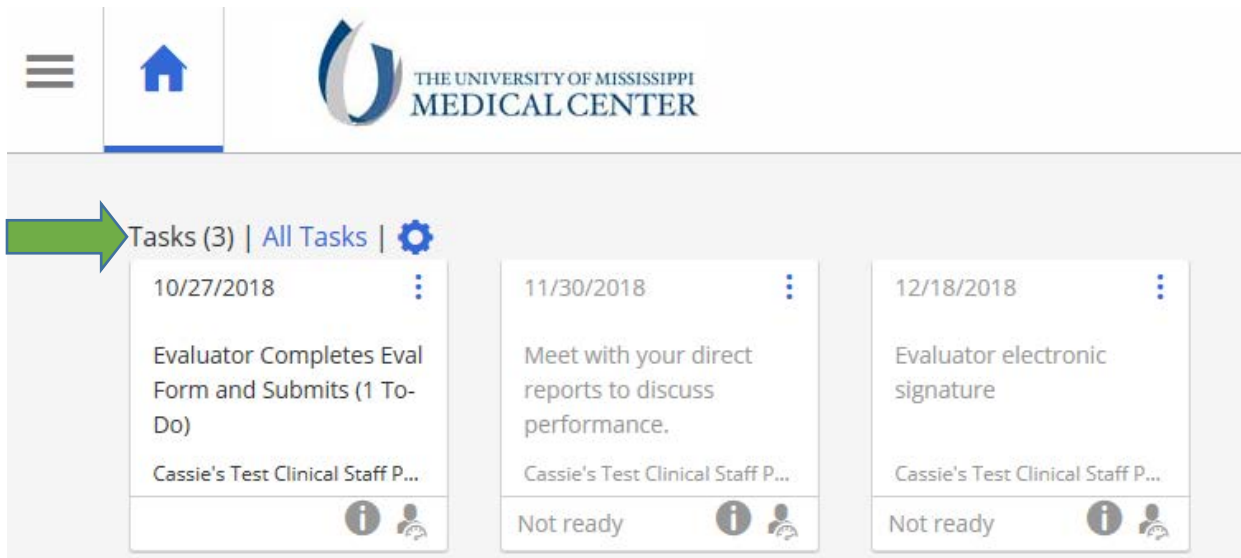
Process Instructions

Step 1: Evaluator Completes Performance Review in Halogen

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




1b. Evaluator navigates to Halogen using access instructions, opens Task



1c. 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. Reminder: Any overall “low” scores require HRBP review and all overall “high” scores require leader review prior to advancing.

 **Sonny Employee**
 Cassie's Test Clinical Staff Process
 By Test11 Manager

Save Send for Review... Submit


2018 Clinical Staff Performance Evaluation

Employee Identification



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

Step 2. Evaluator Meets with Employee and Discusses Review

Once Evaluator meets in person with employee and conducts performance discussion, Evaluator re-opens task, makes any needed edits and Clicks Submit.


Meet with your direct reports to discuss performance. ✕

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Employee Name ▲	Task
Sonny Employee	  Review & Comment

Save Submit


Supervisor Final Comments



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

- Employee navigates to Halogen using access instructions, opens task, chooses to agree or disagree with evaluation, enter any final comments, and clicks Sign Off. If employee selects do not agree, a notification will be send to the HRBP who will be in contact with the Evaluator to provide consultation.

Employee final comment, chooses "agree/disagree" statement, and electronic signature Help

 **Sonny Employee**
 Cassie's Test Clinical Staff Process
 By Test11 Manager

Employee Final Comments

I agree with this evaluation
 I do not agree with this evaluation

ABC

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

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


Evaluator electronic signature


Displaying 1 - 1 of 1

Employee Name ▲	Task
Sonny Employee	<input type="button" value="Sign Off"/> <input style="border: 2px solid green;" type="button" value="View Document"/>

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.

Evaluator electronic signature Help

 **Sonny Employee**
 Cassie's Test Clinical Staff Process
 By Test11 Manager


 2018 Clinical Staff Performance Evaluation

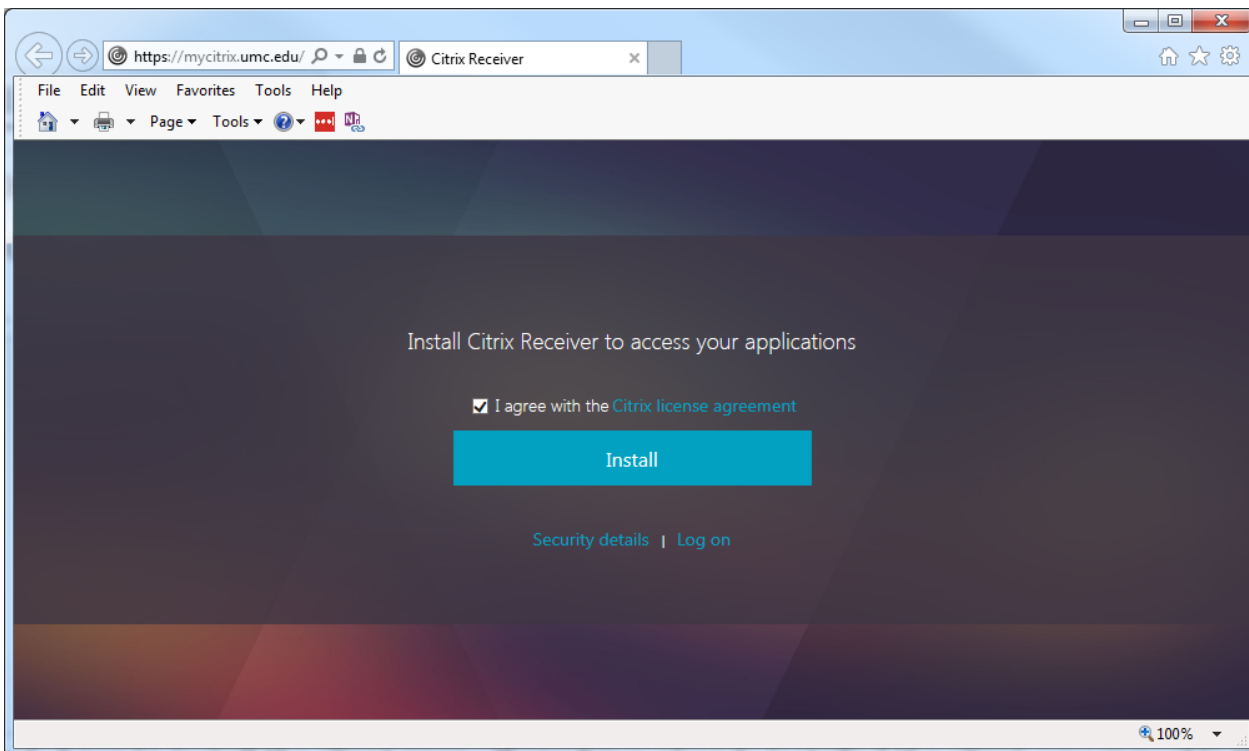
Document Sign-Off

Employee: Sonny Employee
 Leader: Test11 Manager
 Signed Off By: Cassandra King as Test11 Manager
 Sign-off Date: 2018/10/09

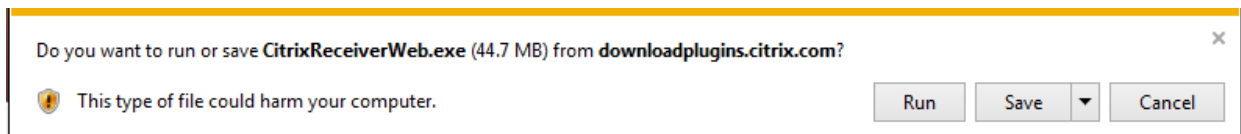
Accessing Lawson via Citrix

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.



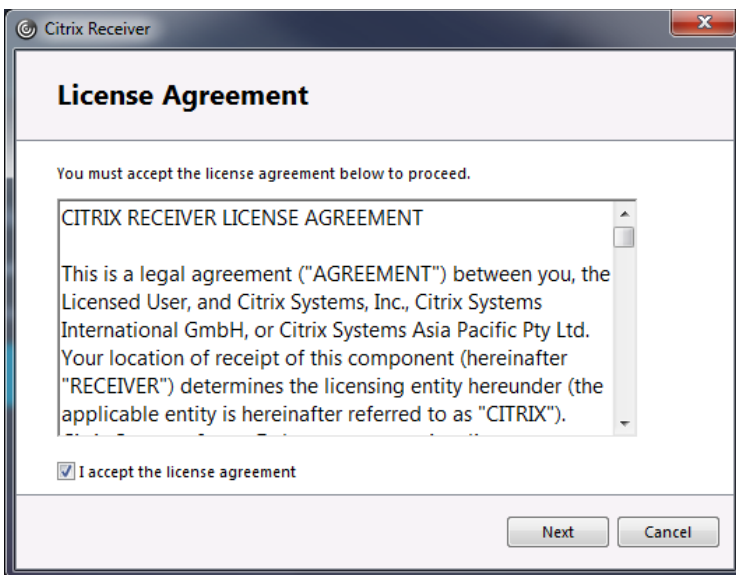
3. Click the **RUN** button when you see the following popup box:



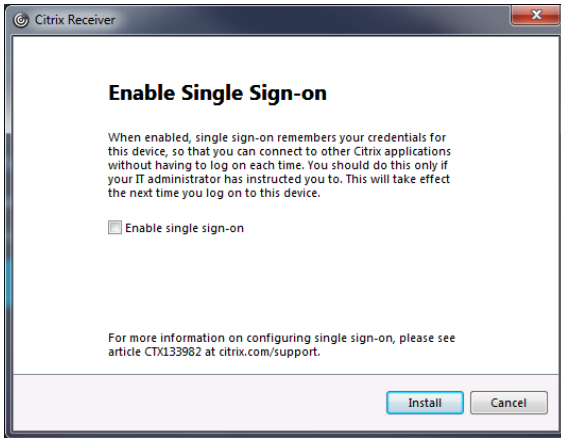
4. Click the **START** button on this window to continue:



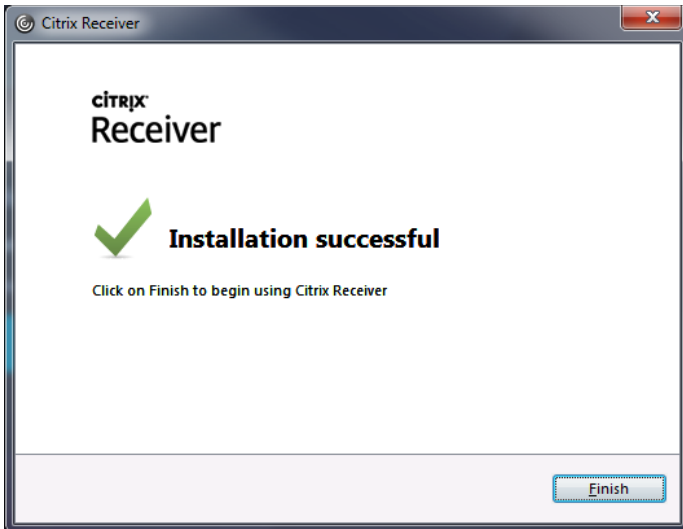
5. Click the checkbox beside I *accept the license agreement* and then click the **NEXT** button:



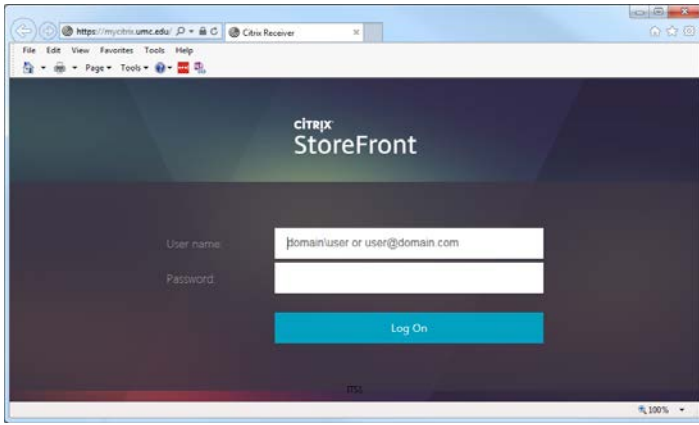
6. Click the **INSTALL** button:



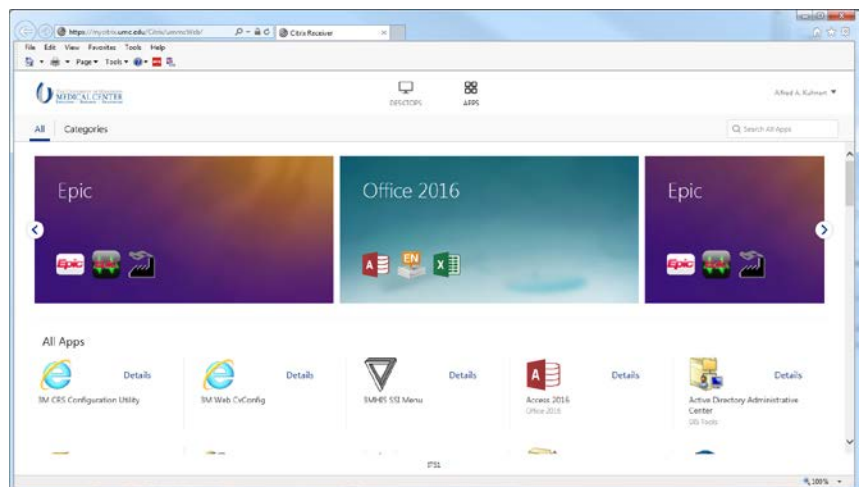
7. When the installation finishes, you will see the following popup box. Click on the **FINISH** button.



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

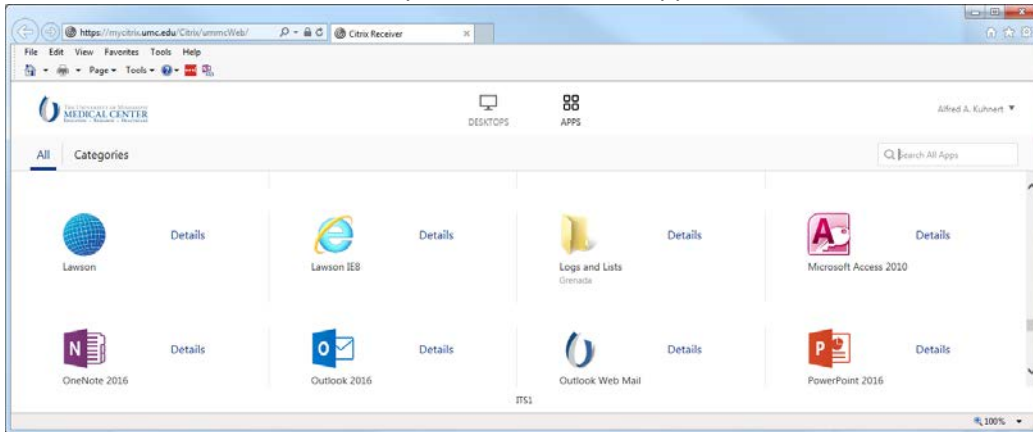


9. Enter your network username and password, and then click the **LOG ON** button.

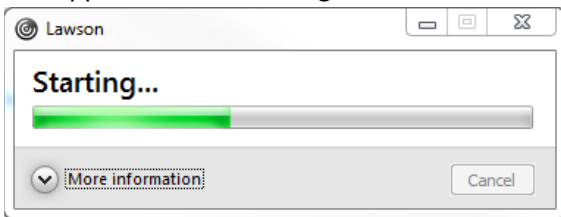


You will see all the Citrix apps assigned to you:

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 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.]

