



TALENT MANAGEMENT EVOLUTION



# TalentEvolution Training Document

**Talent Management Evolution, Inc.**

A large, 3D geometric graphic composed of several overlapping, translucent blue and grey rectangular blocks arranged in a complex, angular shape.

**2015**

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# The Supervisor Performance Review Process

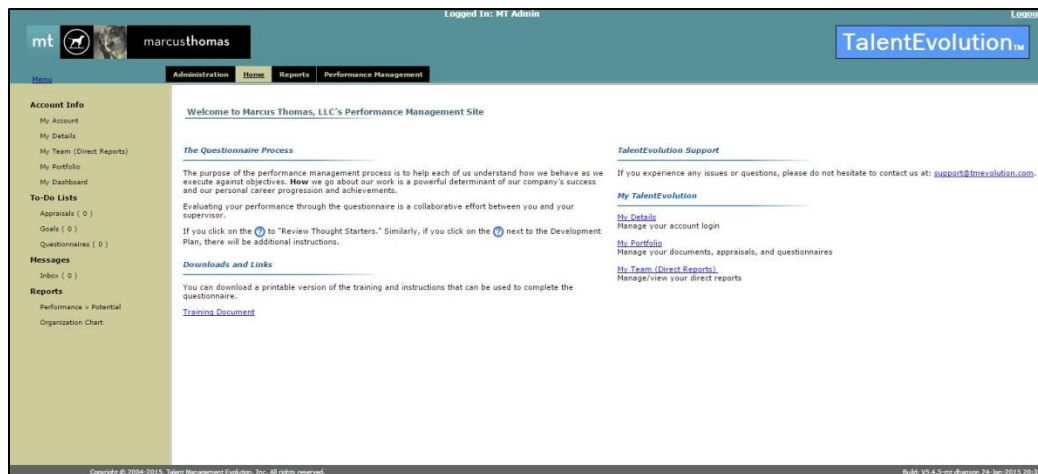
## How to Login and Find the Forms

- 1) Login using your username and password at <https://www.tmelogin.com/marcusthomas>.  
Usernames are case-sensitive!
  - a. Upon your first visit, you will be required to change your password. Please create a password that is between 8 and 25 characters. You can use numbers, letters and special characters. You will not be able to reuse the last five passwords you have used in the past.

**By logging on I agree that I have read and understood the above.**

Username :	<input type="text"/>
Password :	<input type="password"/>
	<input type="button" value="Login"/>
<a href="#">Forgotten Password?</a>	

- b. Below is a screenshot of your Home page.



- 2) In the navigation panel on the left, click on the 'Performance Review' To-Do List or via the link on the 'Home' page upon entering the application.



## The Performance Review Form

- 1) In the 'Performance Review' To-Do List, there is a list of review forms to be completed. Click the "Answer" button of the form to be answered.

Appraisals				
Appraisals				
One item found.				
Name	Appraisal Role	Evaluatee	Due Date	Actions
Appraisal	Manager	Andrew Wiles		Answer

- 2) At the top of the form, there are multiple tabs: one that contains the manager form to be filled out and any other review forms that correspond to the person being evaluated. These extra tabs allow the manager to view the responses of the other evaluators.
  - a. These other forms include self-evaluation and any peer responses that were selected.

Appraisals	Appraisal - Andrew Wiles	Review Appraisal: Appraisal - Andrew Wiles	Objectives
------------	--------------------------	--	------------

- 3) Using the drop-down menu, select the area of interest to view for any non-manager forms. This allows the manager to quickly find the relevant corresponding information to his/her own evaluation of the individual.

Appraisals Appraisal - Andrew Wiles Review Appraisal: Appraisal - Andrew Wiles Objectives

**Questionnaire: MarcusThomas Performance Review Form**

Questionnaire group : Please Select

- 4) Fill out the manager form with the desired responses.

Appraisals Appraisal - Andrew Wiles

Questionnaire is updated automatically as you type/modify the details

**Questionnaire: Appraisal - Andrew Wiles**

Questionnaire for : Andrew Wiles

Performance/Self-Review

Discussion Point: 1. Provide an overview of your role, e.g., responsibilities, accounts, projects : Comments

Discussion Point: 2. What went well? What accomplishments or work are you most proud of? : Comments

Discussion Point: 3. What could have been improved? : What didn't go well? why? : What can/are you doing to change that? :

Discussion Point: 4. How have you "made a mark"? : Comments

Discussion Point: 5. What have you learned this year relative to: The industry, My craft, Digital/social, Behavior, Attitude, SAIB? : Comments

Discussion Point: 6. What do you feel are your key strengths (1-3)? : Comments

Discussion Point: 7. Consider objectives for the next 6-12 months : What are your career/development goals or training objectives for the year? : What types of training, experiences or development opportunities would be helpful to achieve those objectives? :

Done

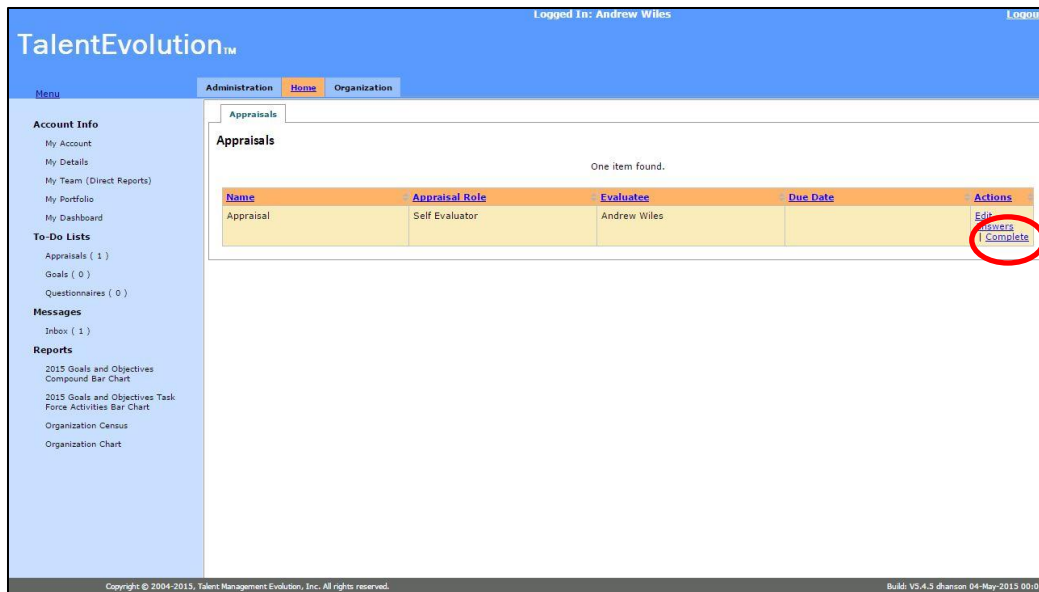
Person Management Evolution, Inc. All rights reserved. Build: US-4.5 (Release 04-May-2013 09:02)

- 5) When finished, click "Done" at the bottom.
- 6) A read-only view of the form will display on the screen. If you want to make a change, click the "Edit" button at the top of the page. If you are satisfied with the form or you would like to complete it later, click on the "Close" button at the top. This will bring you back to the list of Performance Reviews to be completed.

Appraisals Appraisal - Andrew Wiles Review

**Close Edit Export PDF**

- 7) Once the form looks as desired and the "Close" button has been selected, the form will close and return to the Performance Review List view. Click on the "Complete" link at the right of the form to submit the form.
- Note: Once "Complete" has been selected, you can no longer edit the review form.



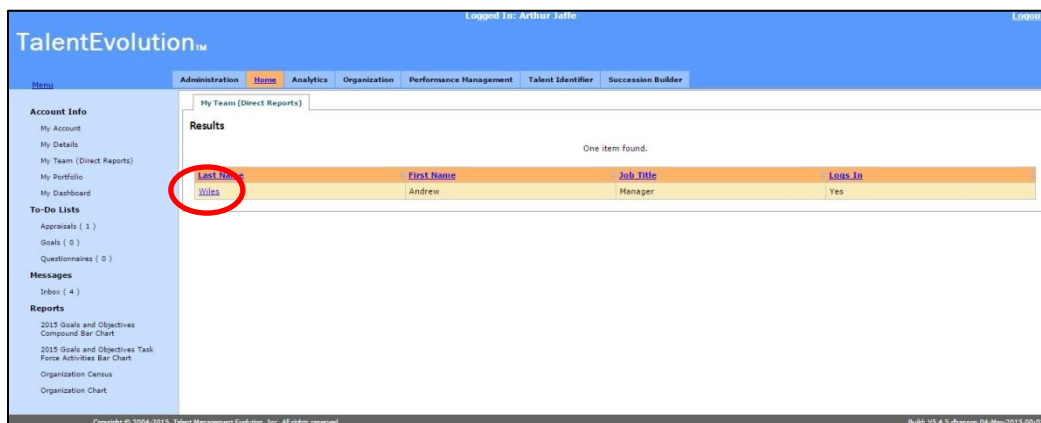
- 8) The form has been submitted and the evaluation is complete.
  - a. The employee can now see the completed form in his/her 'Portfolio.'

## Viewing Submitted Forms

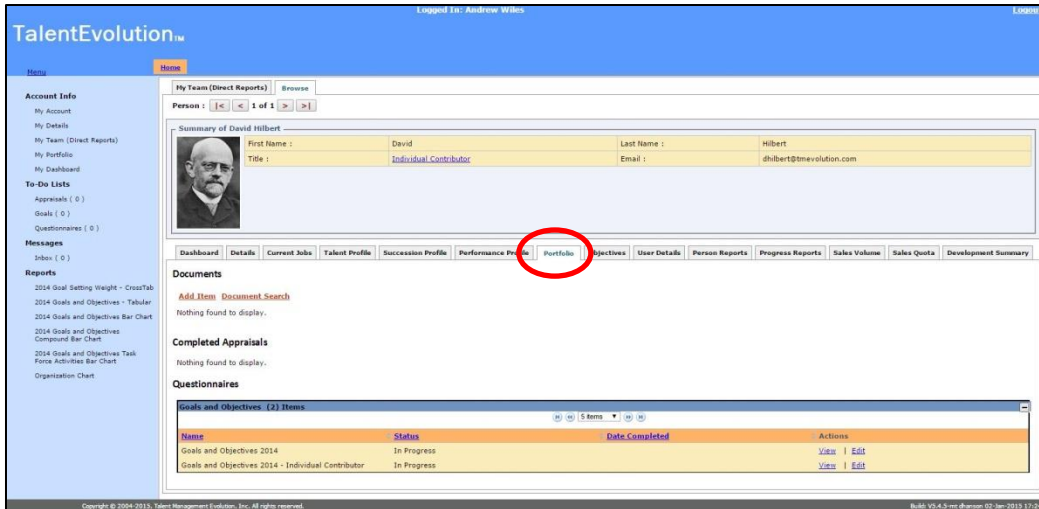
- 1) Once the Performance Review form has been submitted, the manager can view it by clicking the 'My Team (Direct Reports)' link on the left-hand navigation panel or by the link on the home page.



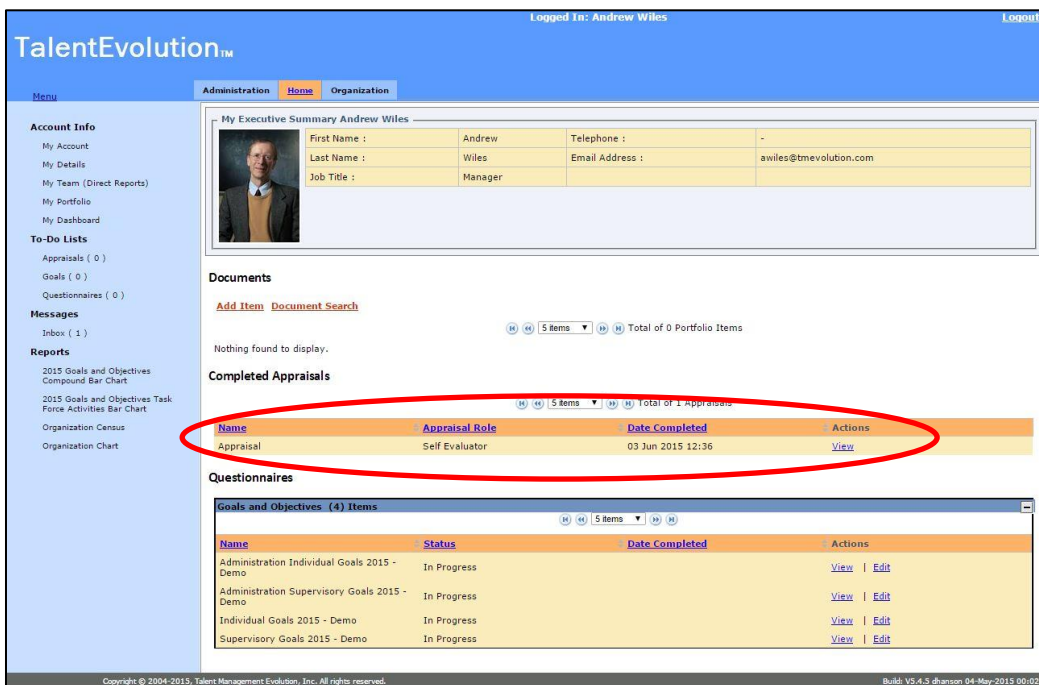
2) Select the team member of the form you wish to view.



3) Select the "Portfolio" tab under his/her information.



- 4) Under the area labeled “Completed Performance Review,” there will be a list of review forms that have been completed and submitted. Click “View” of the form you wish to see.
  - a. Both manager-completed and self-evaluations of the employee can be found here.
  - b. Any forms completed by a non-manager evaluator will not be displayed (i.e. peer reviews).





# The Supervisor Level Development Plan / MAM Statement of Intent Process

## How to Login and Access Submitted Form\*

- 1) Login using your username and password at <https://www.tmelogin.com/marcusthomas>.  
Usernames are case-sensitive!
  - a. Upon your first visit, you will be required to change your password. Please create a password that is between 8 and 25 characters. You can use numbers, letters and special characters. You will not be able to reuse the last five passwords you have used in the past.

By logging on I agree that I have read and understood the above.

Username :	<input type="text"/>
Password :	<input type="password"/>
<input type="button" value="Login"/>	
<a href="#">Forgotten Password?</a>	

- b. Below is a screenshot of your Home page.

mt marcusthomas TalentEvolution™

Home Administration Home Reports Performance Management

Welcome to Marcus Thomas, LLC's Performance Management Site

**The Questionnaire Process**

The purpose of the performance management process is to help each of us understand how we behave as we execute against objectives. How we go about our work is a powerful determinant of our company's success and our personal career progression and achievements.

Evaluating your performance through the questionnaire is a collaborative effort between you and your supervisor.

If you click on the **Q** to "Review Thought Starters." Similarly, if you click on the **Q** next to the Development Plan, there will be additional instructions.

**Downloads and Links**

You can download a printable version of the training and instructions that can be used to complete the questionnaire.

[Training Document](#)

**TalentEvolution Support**

If you experience any issues or questions, please do not hesitate to contact us at: [support@tmevolution.com](mailto:support@tmevolution.com).

**My TalentEvolution**

- [My Details](#)  
Manage your account login
- [My Portfolio](#)  
Manage your documents, appraisals, and questionnaires
- [My Team \(Direct Reports\)](#)  
Manage/view your direct reports

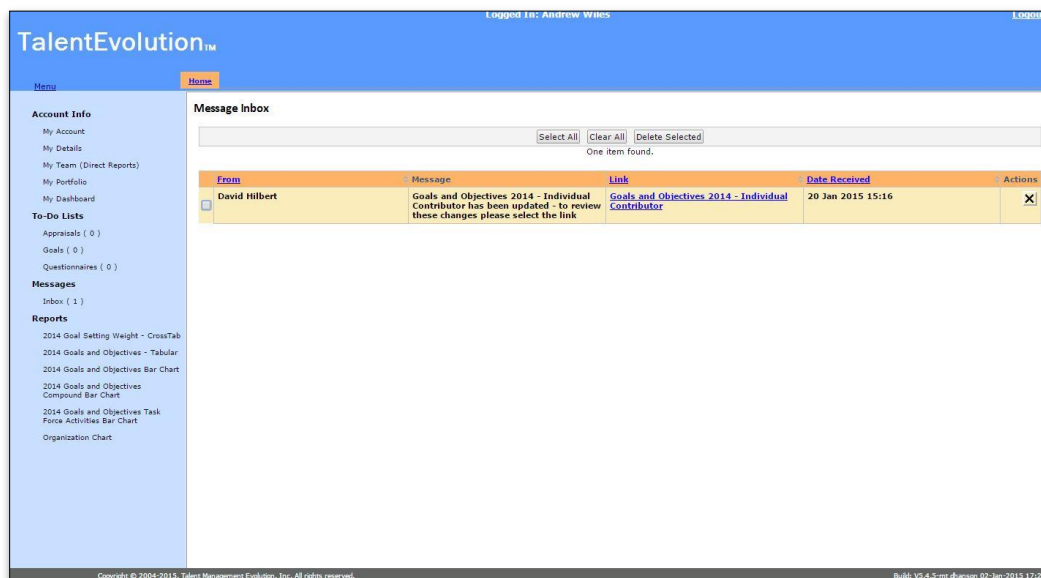
Copyright © 2004-2015, Talent Management Evolution, Inc. All rights reserved. Build: V5.4.5-mt-dhanson 24-Jan-2015 10:33

- 2) When the form is completed by the individual contributor (IC) and sent to the supervisor for review, the supervisor can find the form in his/her inbox. The 'Inbox' is located on the 'Home' tab, in the navigational panel on the left-hand side of the screen.

\* Note: The screenshots used within the training manual may look different because of specific client environment layouts. The content and processes will be consistent with your platform.



- 3) The supervisor will also receive an email notification telling him/her that the form is ready for review.
  - a. A link is provided within the email to access the form as well
- 4) The supervisor can access the IC completed form by clicking on the link provided in the 'Inbox.'



## The Development Plan

- 1) Once the form has been accessed, the supervisor can then edit and add his/her own content to the form either by modifying the IC's content or by adding a new Development row. Add a new row by clicking on the "Add" button at the bottom of the last row entered in the form.

The screenshot shows the 'Development Plan' form with a table containing columns: Development, Grade and/or Training Area(s), Measurement (Desired Outcomes), Process (How Will This Happen?), Facilitator, Training, and Notes. At the bottom of the table, there is an 'Add' button circled in red.

- 2) If there is a section that the supervisor does not want the IC to manipulate, a "Select to Enable/Disable Row" checkbox at the end of the row is available. Once clicked, that row of questions becomes read-only to the IC. Every Development row has the ability to be enabled/disabled.
  - a. The IC does not see this option when filling out his/her form

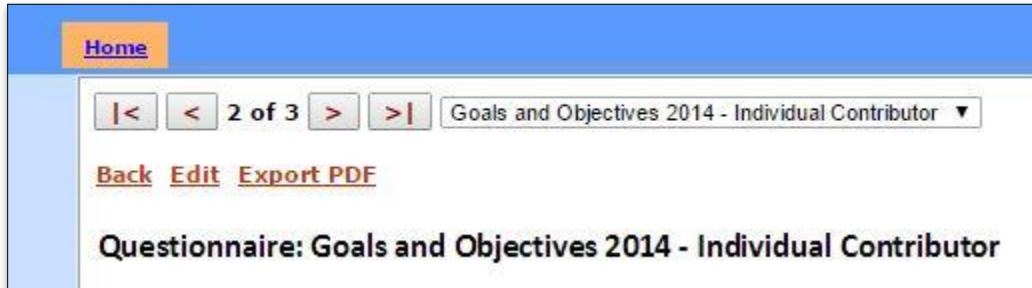
The screenshot shows a small dialog box with the title 'Select To Enable/Disable Row' and a checked checkbox below it.

- 3) Once the supervisor has gone through all the Development goals, checking the "Send Email Notification" and "Send to individual for review" checkboxes and clicking "Send" will send the form back to the IC for review
  - a. A notification verifying the email was sent will appear on the bottom of the form

The screenshot shows two parts of the form. The top part has checkboxes for 'Send Email Notification' and 'Send to manager for review', both checked, and a 'Send' button circled in red. Below it is a 'Close' button. The bottom part shows the 'Send to individual for review' checkbox unchecked, a 'Send' button, and a yellow banner at the bottom that says 'Information successfully sent'.

- b. If the checkboxes are not checked and are not sent, the IC is not notified and will not know to complete the process!
- 4) Click the "Close" button to close the editing process of the form.

- 5) From here, a PDF version of the report can be downloaded by clicking on the “Export PDF” button at the top of the page. Editing can continue by clicking on the “Edit” button or pressing the “Back” button will return to the ‘My Portfolio’ screen. If more forms are to be completed, the navigational buttons at the top or the drop-down menu will go to the next form.



- 6) The individual and the manager continue sending the form back-and-forth in this manner until both parties agree on the form and are satisfied with its contents.

### Make a Mark Statement of Intent

- 1) Once the form has been accessed, the supervisor can then edit and add his/her own content to the form either by modifying the IC’s content or by adding a new comments row. Add a new row by clicking on the “Add” button at the bottom of the last row entered in the form.



- 2) If there is a section that the supervisor does not want the IC to manipulate, a “Select to Enable/Disable Row” checkbox at the end of the row is available. Once clicked, that row of questions becomes read-only to the IC. Every Development row has the ability to be enabled/disabled.
  - a. The IC does not see this option when filling out his/her form



- 3) Once the supervisor has gone through all the Make a Mark comments, checking the “Send Email Notification” and “Send to individual for review” checkboxes and clicking “Send” will send the form back to the IC for review
  - c. A notification verifying the email was sent will appear on the bottom of the form

Send Email Notification :	<input checked="" type="checkbox"/>
Send to manager for review :	<input checked="" type="checkbox"/>
<input type="button" value="Send"/>	
<input type="button" value="Close"/>	

Send to individual for review :	<input type="checkbox"/>
<input type="button" value="Send"/>	
<b>Information successfully sent</b>	

- d. If the checkboxes are not checked and are not sent, the IC is not notified and will not know to complete the process!
- 4) Click the “Close” button to close the editing process of the form.
  - 5) From here, a PDF version of the report can be downloaded by clicking on the “Export PDF” button at the top of the page. Editing can continue by clicking on the “Edit” button or pressing the “Back” button will return to the ‘My Portfolio’ screen. If more forms are to be completed, the navigational buttons at the top or the drop-down menu will go to the next form.

<a href="#" style="color: white; text-decoration: none;">Home</a>	
<input type="button" value=" &lt;"/> <input type="button" value="&lt;"/> <span style="margin: 0 10px;">2 of 3</span> <input type="button" value="&gt;"/> <input type="button" value="&gt; "/> <span style="border: 1px solid #ccc; padding: 2px;">Goals and Objectives 2014 - Individual Contributor ▼</span>	
<a href="#" style="color: #c00000; text-decoration: underline;">Back</a> <a href="#" style="color: #c00000; text-decoration: underline;">Edit</a> <a href="#" style="color: #c00000; text-decoration: underline;">Export PDF</a>	
<b>Questionnaire: Goals and Objectives 2014 - Individual Contributor</b>	

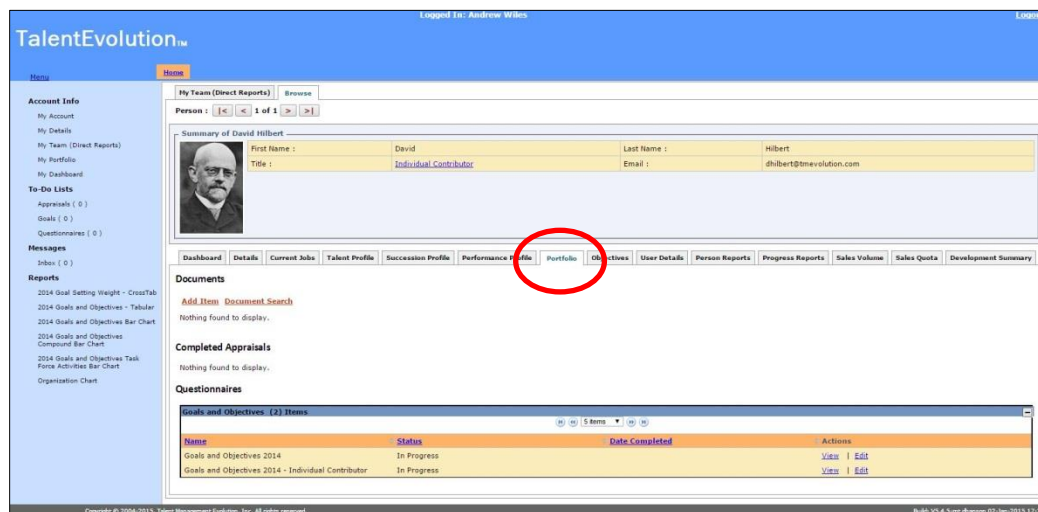
- 6) The individual and the manger continue sending the form back-and-forth in this manner until both parties agree on the form and are satisfied with its contents.

### Viewing an IC's Form

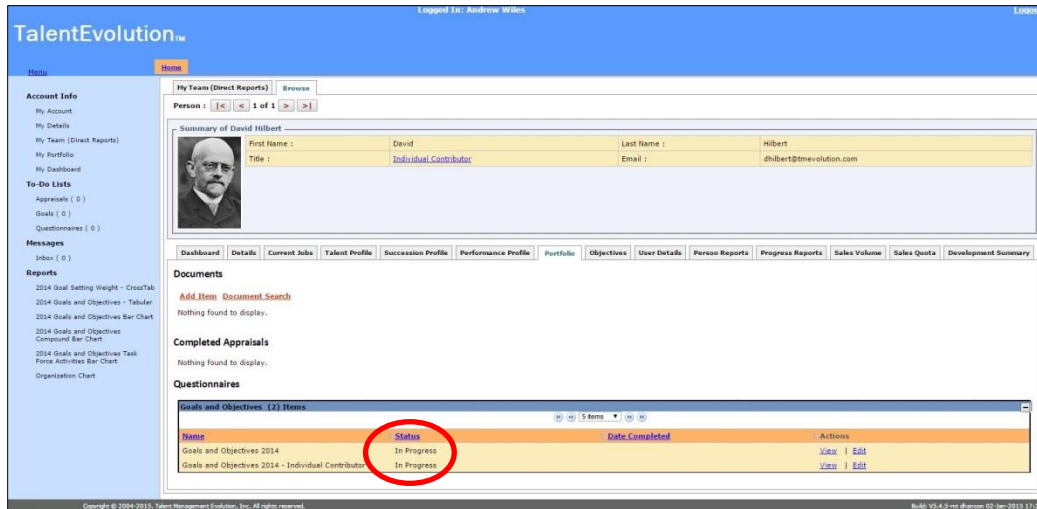
- 7) At any time, the Supervisor can view his/her team member's forms by clicking on 'My Team (Direct Reports)' in the navigational panel on the left-hand side of the 'Home' tab.



- 8) In the 'My Team' screen, click on the team member you wish to view and click on his/her 'Portfolio' tab



- 9) The forms as well as each form's status can be found here.

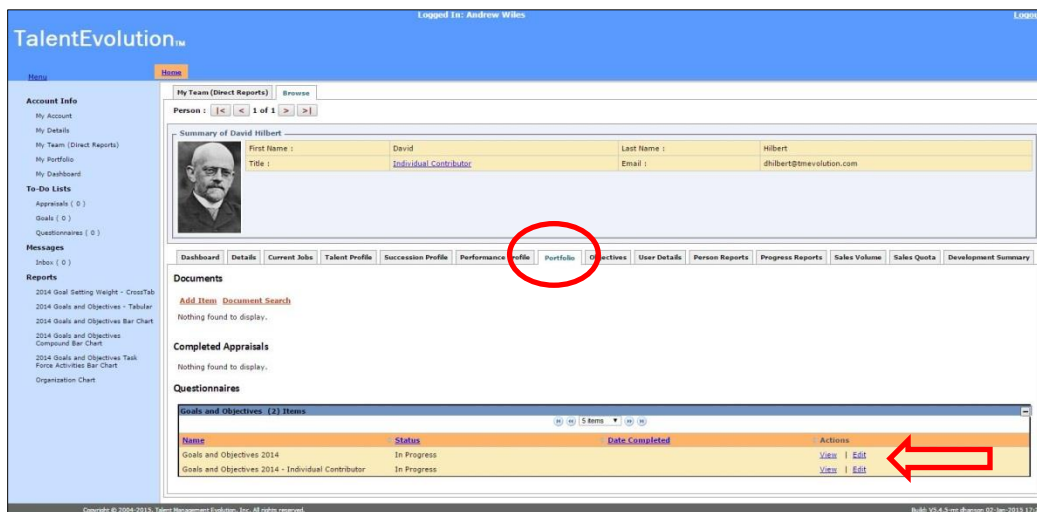


## Change Process

### Supervisor Initiated Change

If during the year a goal or objective needs to be updated, the supervisor can add an addendum to the form.

- 1) In 'My Team (Direct Reports),' the supervisor can select the form that requires updating from the IC's 'My Portfolio' tab and click on "Edit."



- 2) Under the goal or objective being modified, click on the "Add" button within that group.



- 3) A new line will appear and can be filled out, noting the reason(s) for the change in the 'Comments' section.

**Make a Mark Statement of Intent**  
Write 1-2 sentences that capture how you will bring "make a mark" to life over the next year.

Staff Member Comments	Supervisor Comments
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Add Delete

- 4) Check the “Send Email Notification” and “Send to manager for review” checkboxes and click on the “Send” button to complete the form and forward it on to the supervisor.
- a. A notification verifying the email was sent will appear on the bottom of the form

Send Email Notification :	<input checked="" type="checkbox"/>
Send to manager for review :	<input checked="" type="checkbox"/>
<b>Send</b>	
<b>Close</b>	

Send Email Notification :	<input type="checkbox"/>
Send to manager for review :	<input type="checkbox"/>
<b>Send</b>	
<b>Information successfully sent</b>	
<b>Close</b>	

- b. If the checkboxes are not checked and are not sent, the supervisor is not notified and will not know to complete the process!
- 5) Click the “Close” button to close the editing process of the form.

### Individual Initiated Change

An IC can also initiate a change / update to the form. The supervisor will be notified by email and a link to the form will be provided. Additionally, the supervisor can access the updated form via his/her ‘Inbox’ on the ‘Home’ tab.