TalentEvolution Training Document

Talent Management Evolution, Inc.

2015

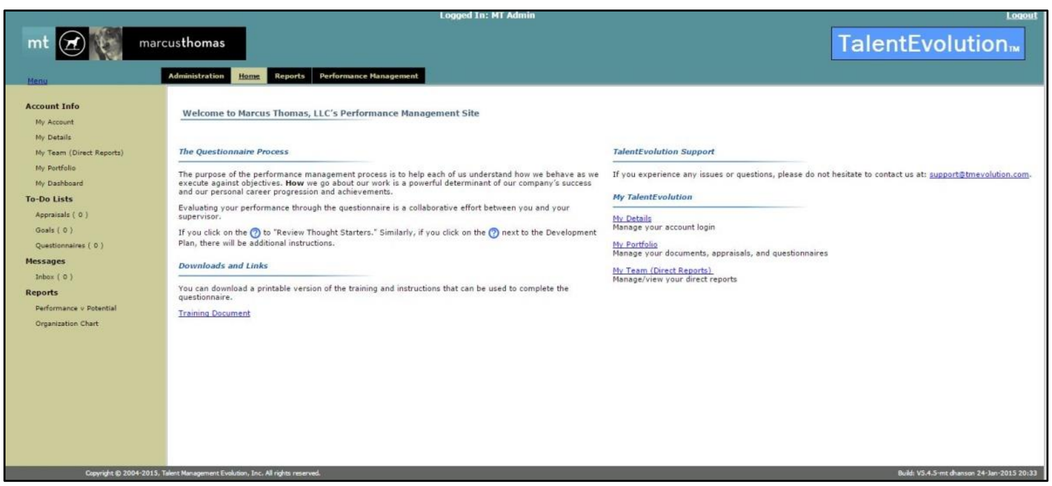
Contents

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.](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.

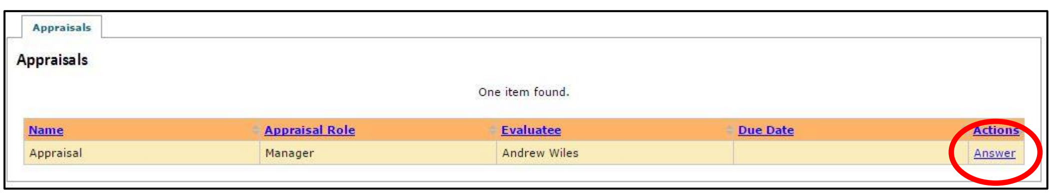
    b. Below is a screenshot of your Home page.



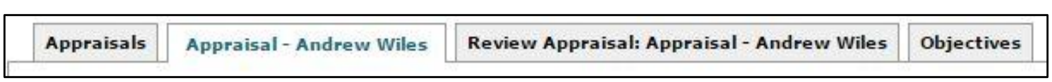
2) In the navigation panel on the left, click on the 'Performance Review' To-Do List or via the link on the 'Home' page upon entering the application.

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.

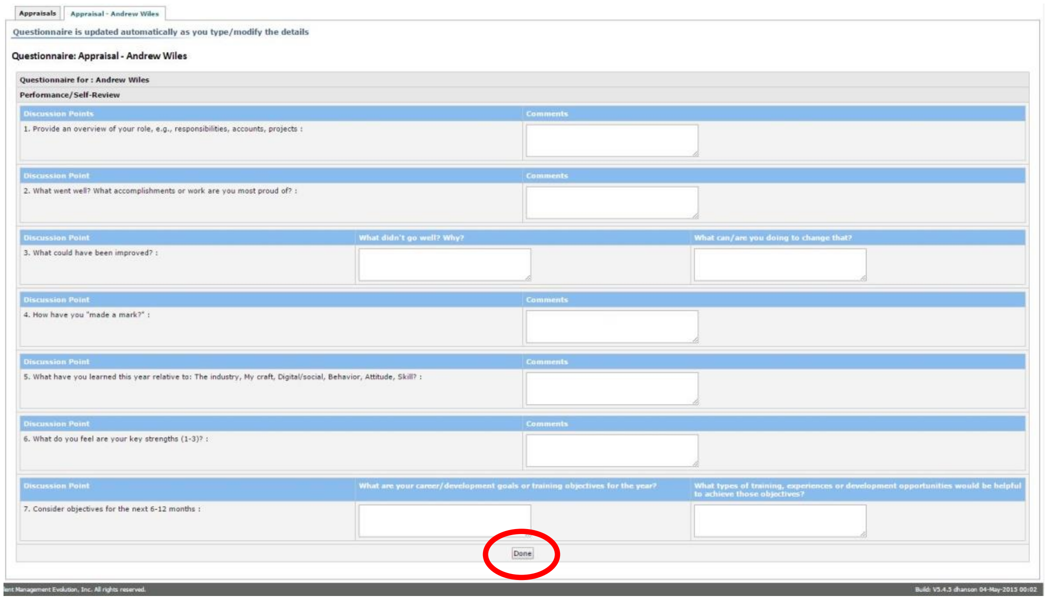


2) At the top of the form, there are multiple tabs: one that contains the manager form to be filled out and any other review forms that correspond to the person being evaluated. These extra tabs allow the manager to view the responses of the other evaluators.
    a. These other forms include self-evaluation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

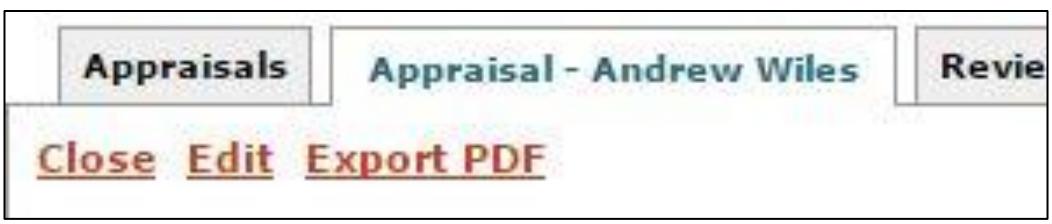


3) Using the drop-down menu, select the area of interest to view for any non-manager forms. This allows the manager to quickly find the relevant corresponding information to his/her own evaluation of the individual.

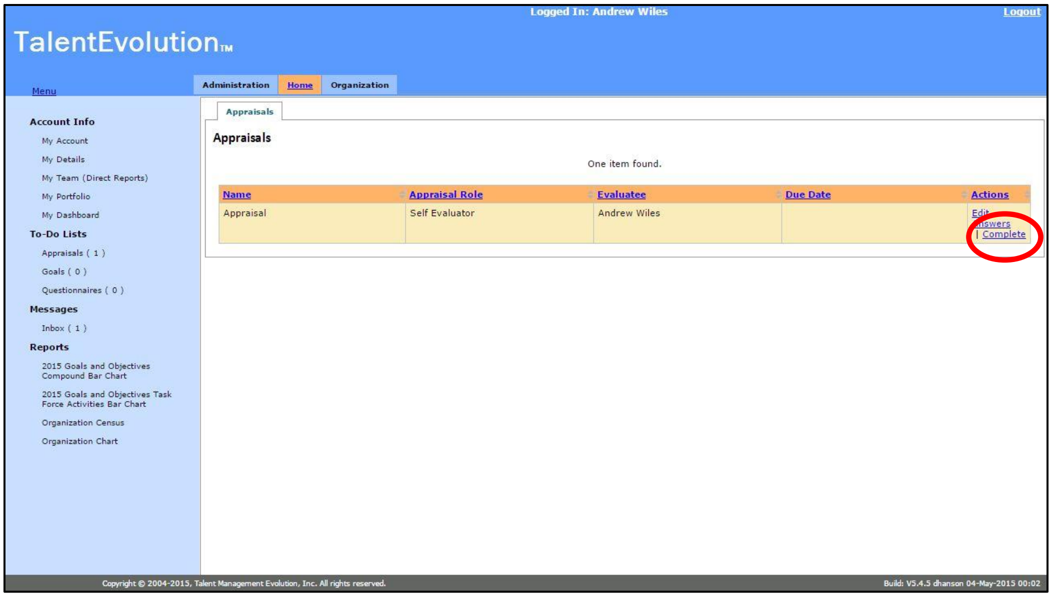
4) Fill out the manager form with the desired responses.



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.



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.
    a. Note: Once "Complete" has been selected, you can no longer edit the review form.

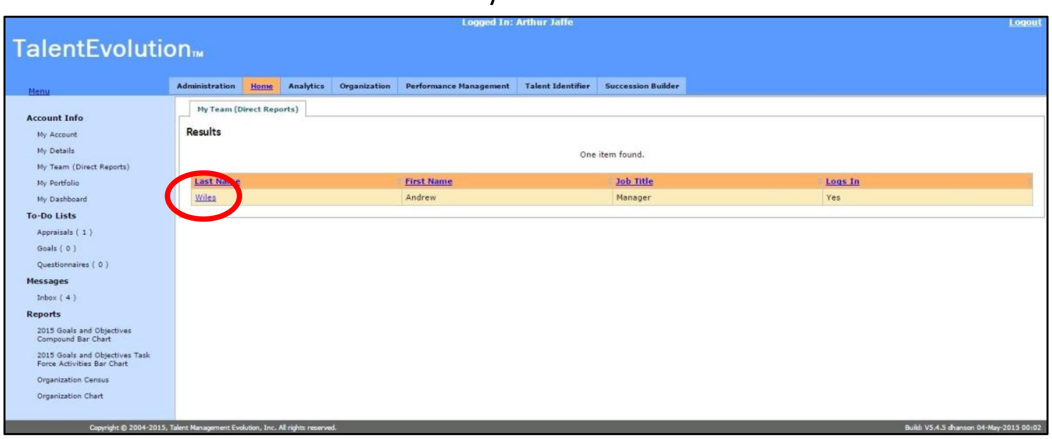


8) The form has been submitted and the evaluation is complete.
    a. The employee can now see the completed form in his/her ‘Portfolio.’

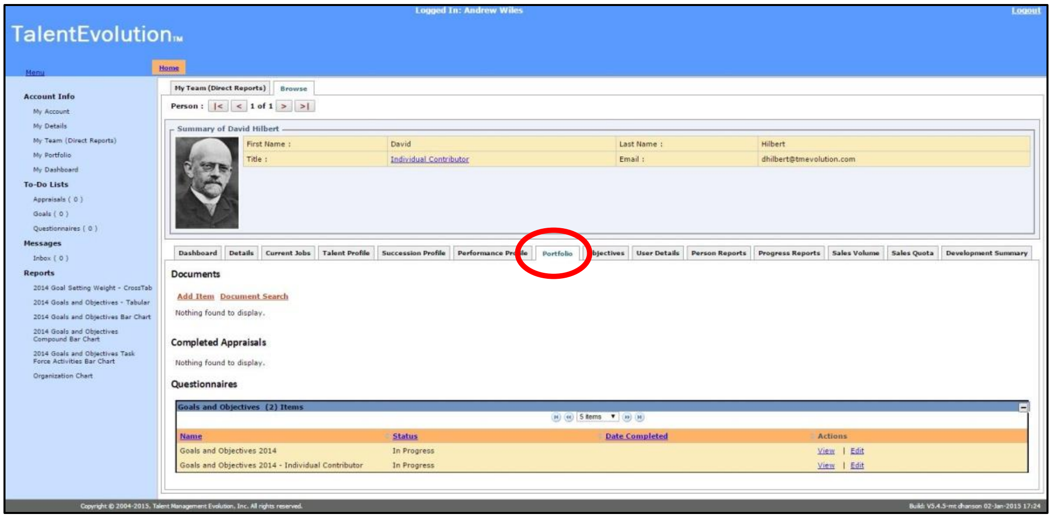
Viewing Submitted Forms

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.

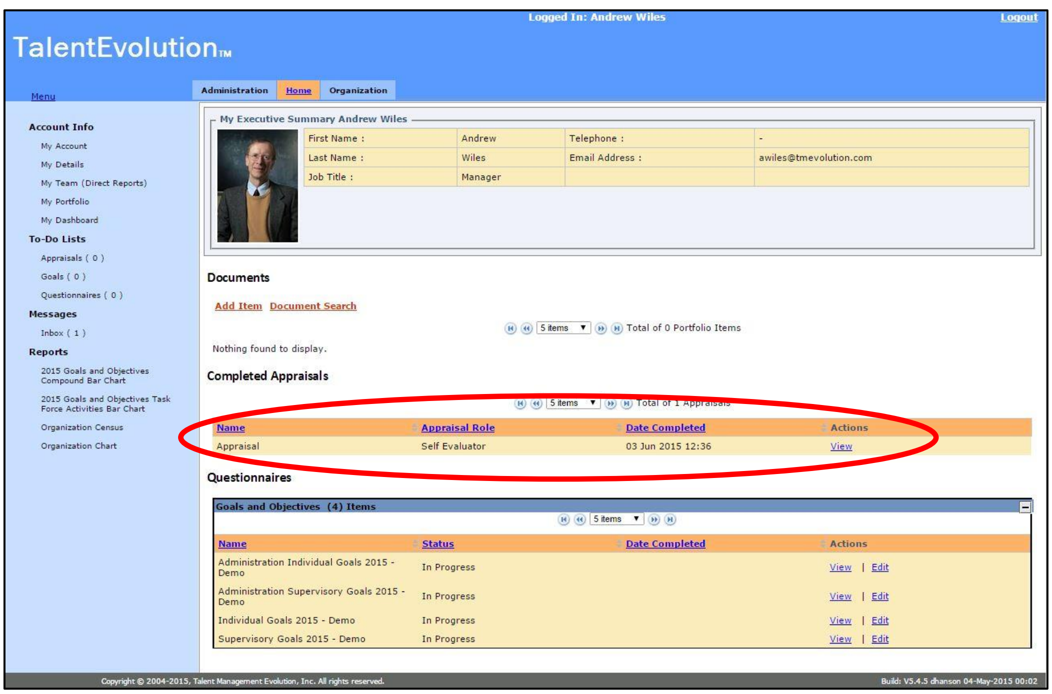
2) Select the team member of the form you wish to view.



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).

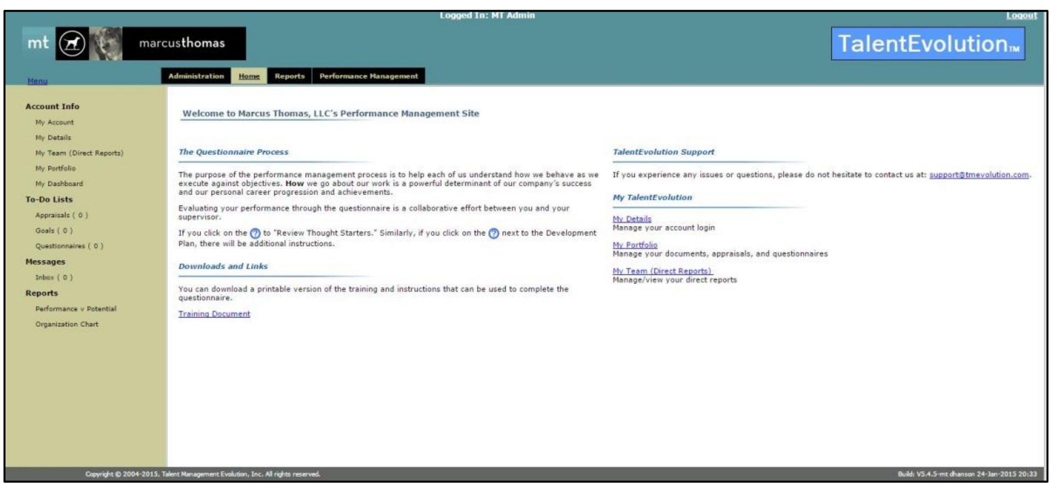


The Supervisor Level Development Plan / MAM Statement of Intent Process

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.

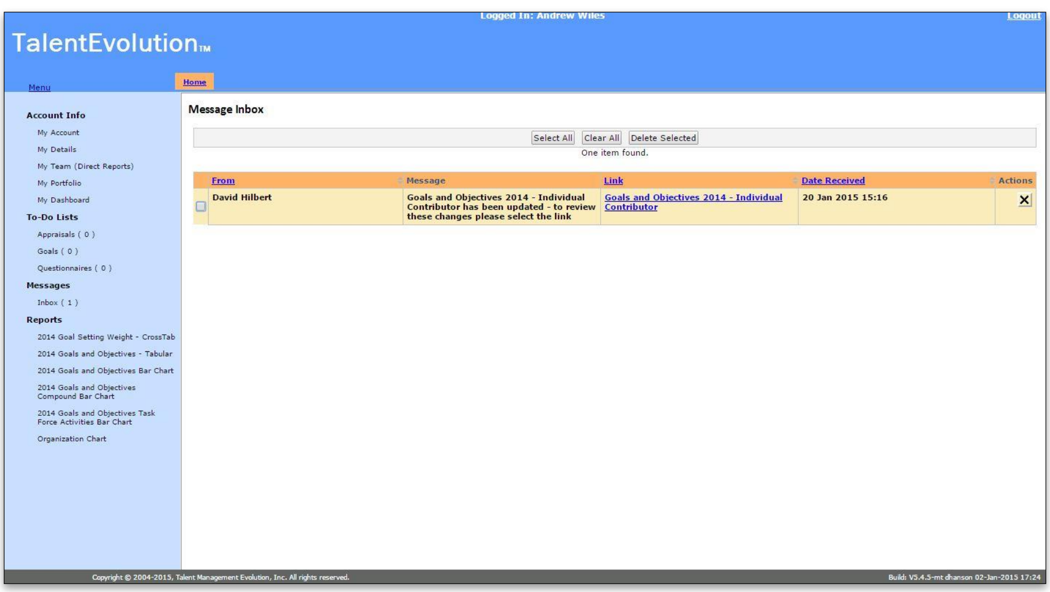
    b. Below is a screenshot of your Home page.



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.

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 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

    b. If the checkboxes are not checked and are not sent, the IC is not notified and will not know to complete the process!

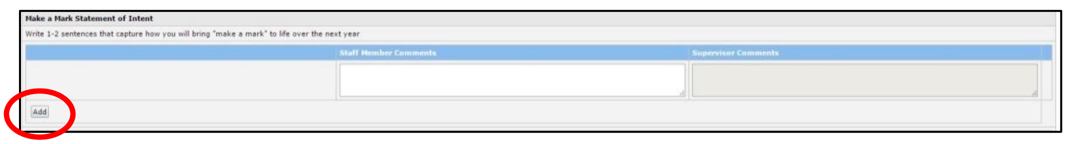
4) Click the "Close" button to close the editing process of the form.

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.

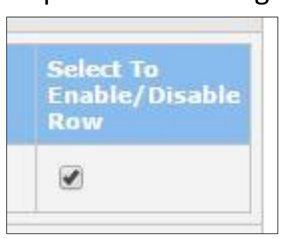
6) The individual and the manger continue sending the form back-and-forth in this manner until both parties agree on the form and are satisfied with its contents.

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

   d. If the checkboxes are not checked and are not sent, the IC is not notified and will not know to complete the process!

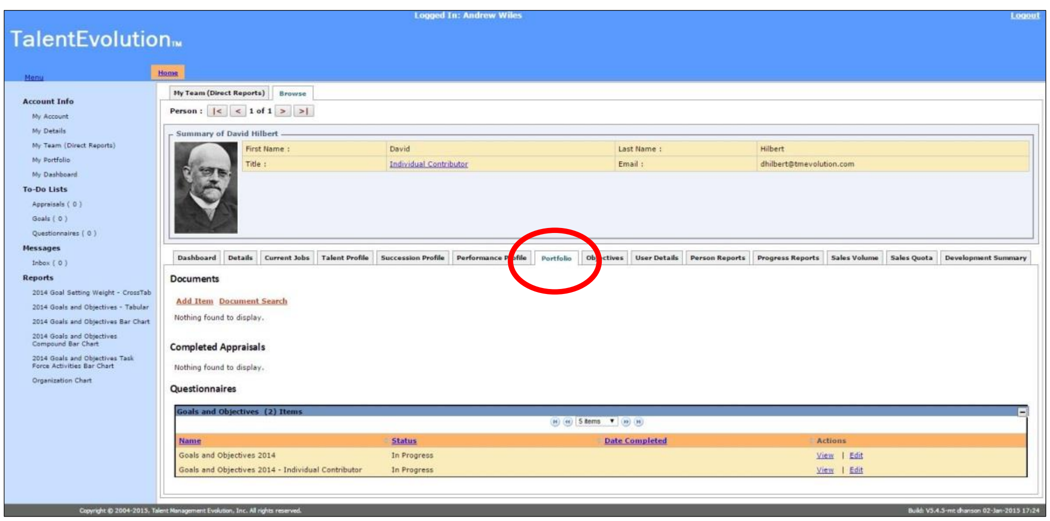
4) Click the "Close" button to close the editing process of the form.
5) From here, a PDF version of the report can be downloaded by clicking on the "Export PDF" button at the top of the page. Editing can continue by clicking on the "Edit" button or pressing the "Back" button will return to the 'My Portfolio' 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.

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.

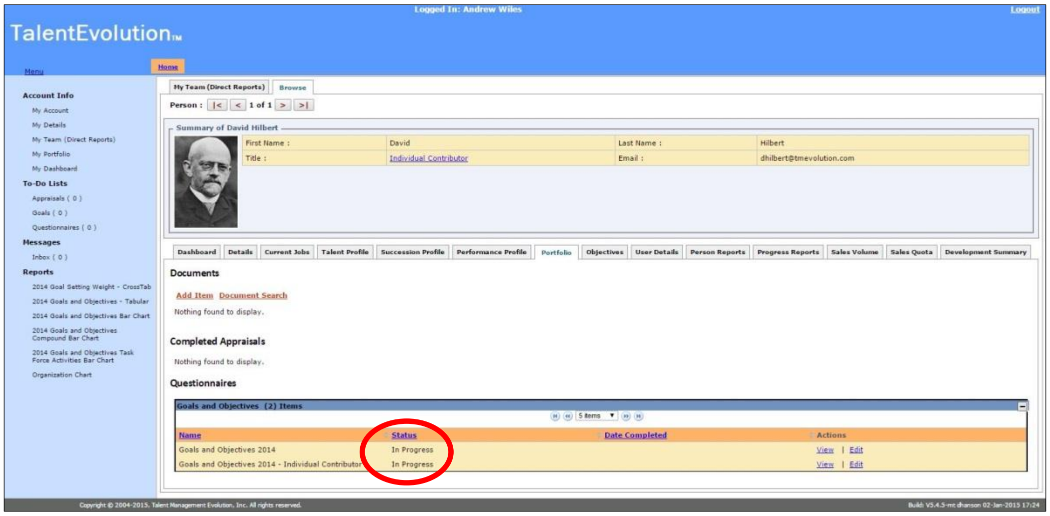
Viewing an IC's Form

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.

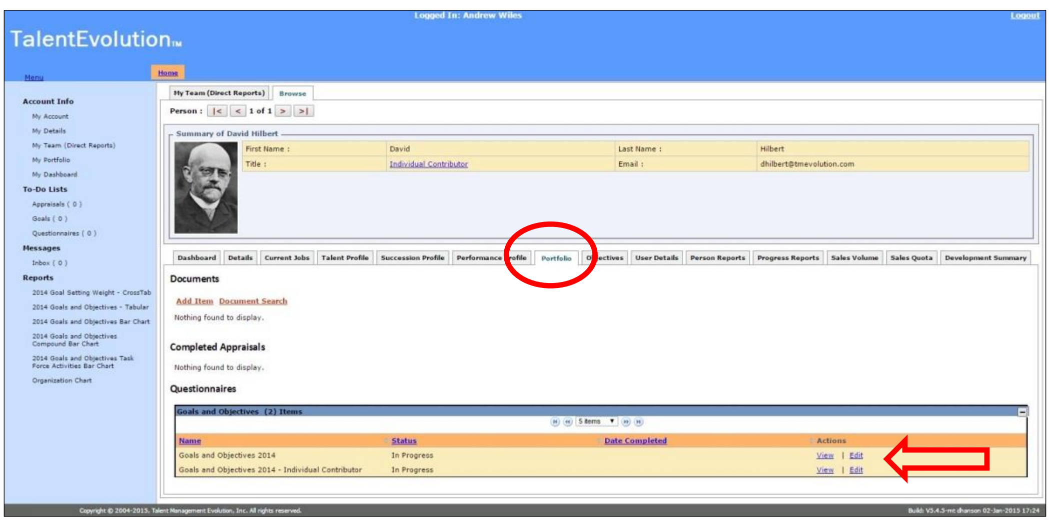


Change Process

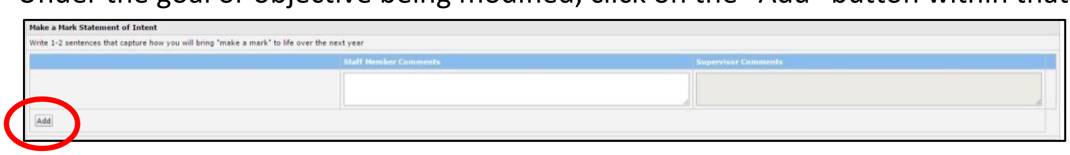
Supervisor Initiated Change

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.”

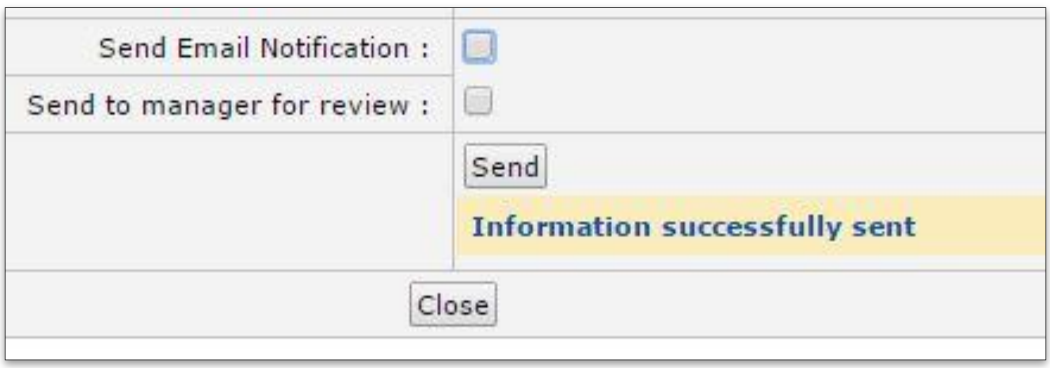


2) Under the goal or objective being modified, click on the “Add” button within that group.



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

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



    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.