TalentEvolution Training Document

Talent Management Evolution, Inc.

2015

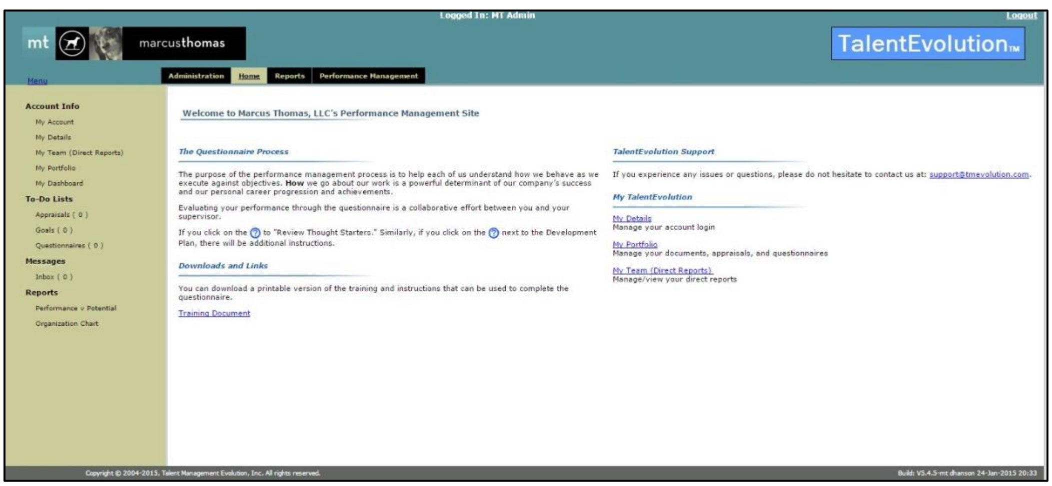
Contents

The Individual Contributor (IC) Performance Review Process

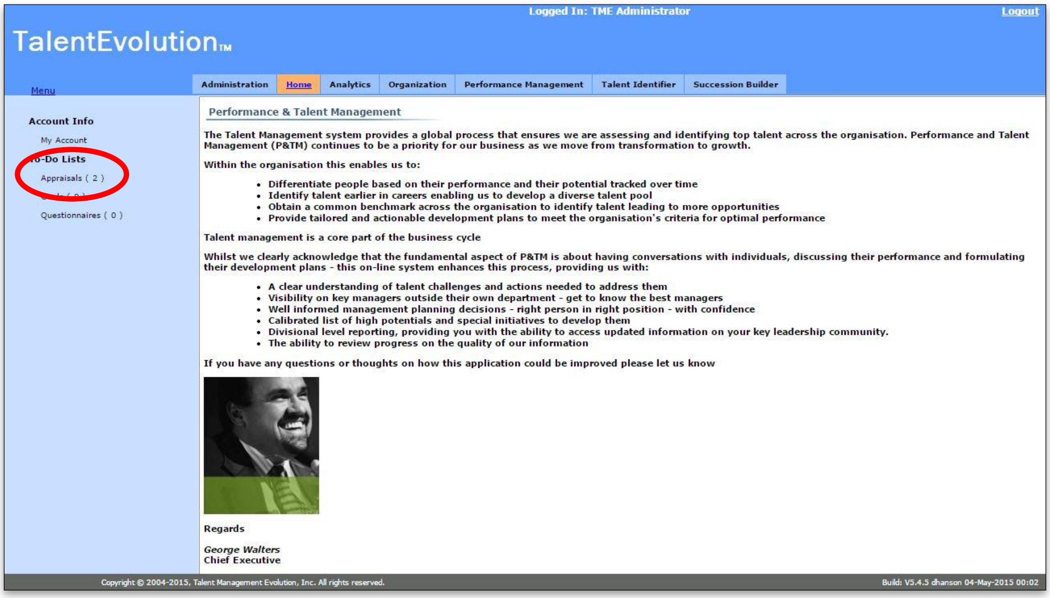
How to Login and Find the Forms

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.

    b. Below is a screenshot of your Home page.

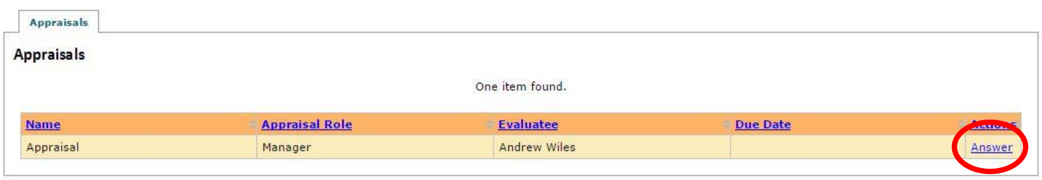


2) In the navigation panel on the left, click on the 'Performance Review' To-Do List or via the link on the 'Home' page upon entering the application.

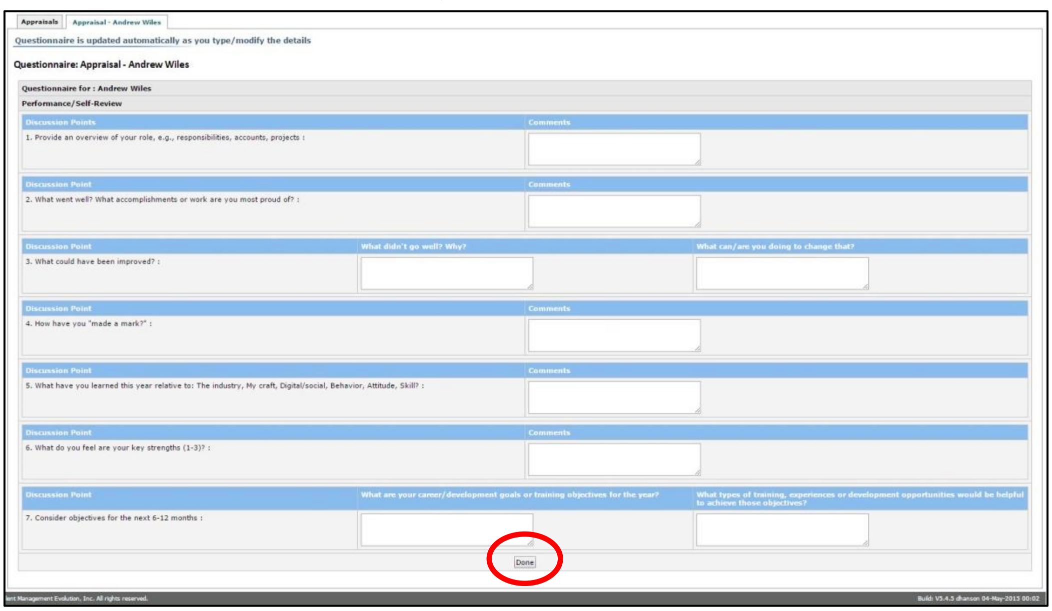


The Performance Review Form

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.



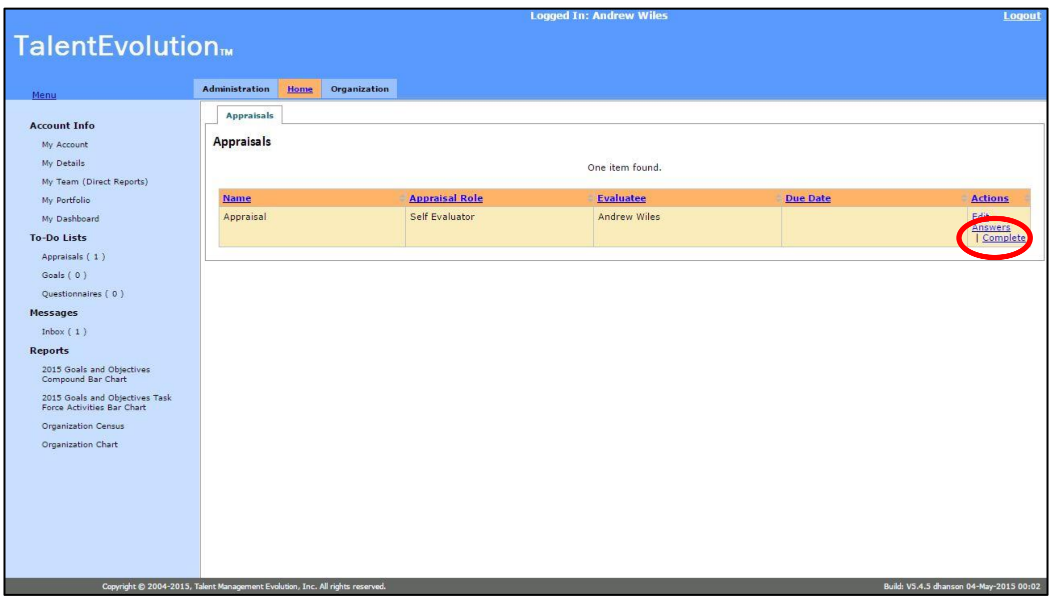
2) Fill out the form with the desired responses.



3) When finished, click "Done" at the bottom.

4) 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.

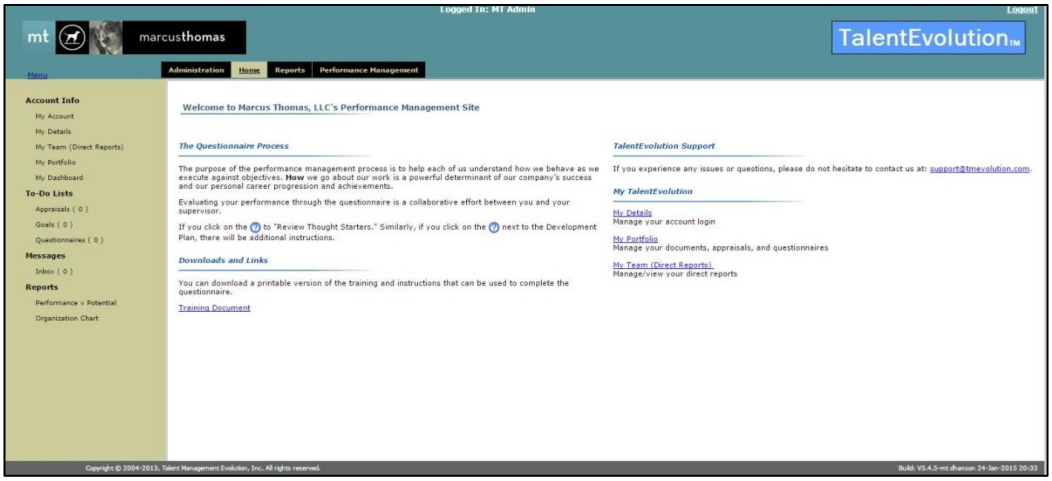
5) Once the form looks as desired and the “Close” button has been selected, the form will close and return to the Appraisal List view. Click on the “Complete” link at the right of the form to submit the form.
   a. Note: Once “Complete” has been selected, you can no longer edit the review form.



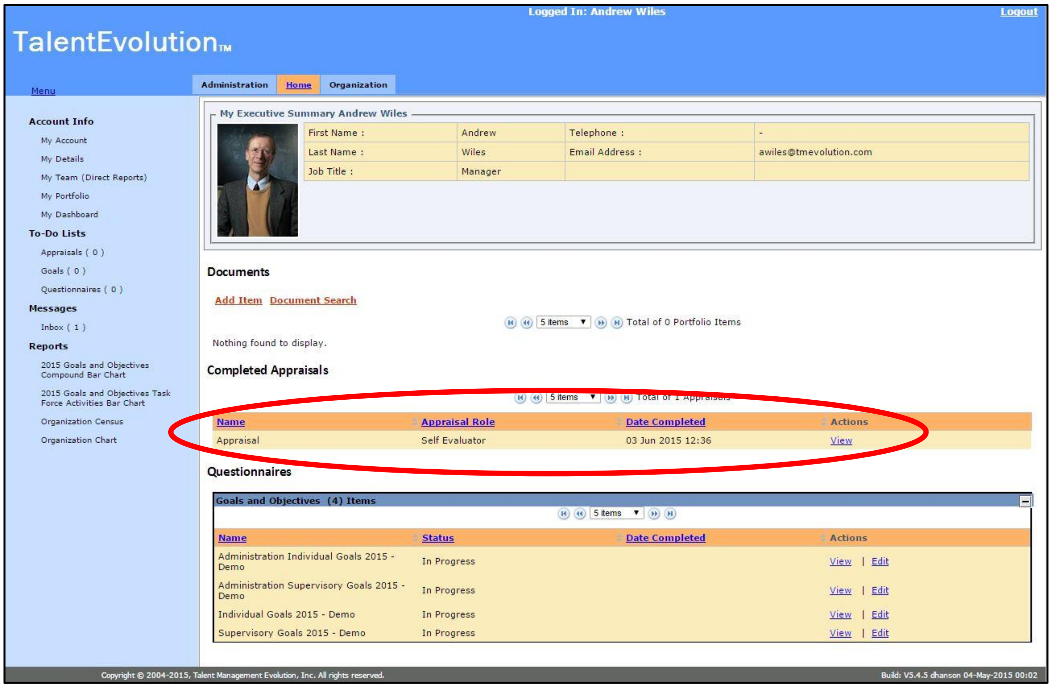
6) The form has been submitted and the self-evaluation is complete.
   a. Notify your supervisor upon completion of your form.

Viewing Submitted Forms

1) Once the Performance Review form has been submitted, it can be viewed by clicking the ‘My Portfolio’ link on the left-hand navigation panel or by the link on the home page.



2) 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. Once your manager has completed his/her form for you, it will also be found here as well.
    b. Any forms completed by a non-manager evaluator will not be displayed (i.e. peer reviews).
    c. Notify your supervisor upon completion of your form.


Logged In: Andrew Wiles
Logout
TalentEvolution™
Menu
Administration
Home
Organization
Account Info
My Account
My Details
My Team (Direct Reports)
My Portfolio
My Dashboard
To-Do Lists
Appraisals (0)
Goals (0)
Questionnaires (0)
Messages
Inbox (1)
Reports
2015 Goals and Objectives Compound Bar Chart
2015 Goals and Objectives Task Force Activities Bar Chart
Organization Census
Organization Chart
My Executive Summary Andrew Wiles
First Name : Andrew
Last Name : Wiles
Job Title : Manager
Telephone : -
Email Address : awiles@tmevolution.com
Documents
Add Item Document Search
5 items Total of 0 Portfolio Items
Nothing found to display.
Completed Appraisals
Name | Appraisal Role | Date Completed | Actions
Appraisal | Self Evaluator | 03 Jun 2015 12:36 | View
Questionnaires
Goals and Objectives (4) Items
Name | Status | Date Completed | Actions
Administration Individual Goals 2015 - Demo | In Progress | View | Edit
Administration Supervisory Goals 2015 - Demo | In Progress | View | Edit
Individual Goals 2015 - Demo | In Progress | View | Edit
Supervisory Goals 2015 - Demo | In Progress | View | Edit
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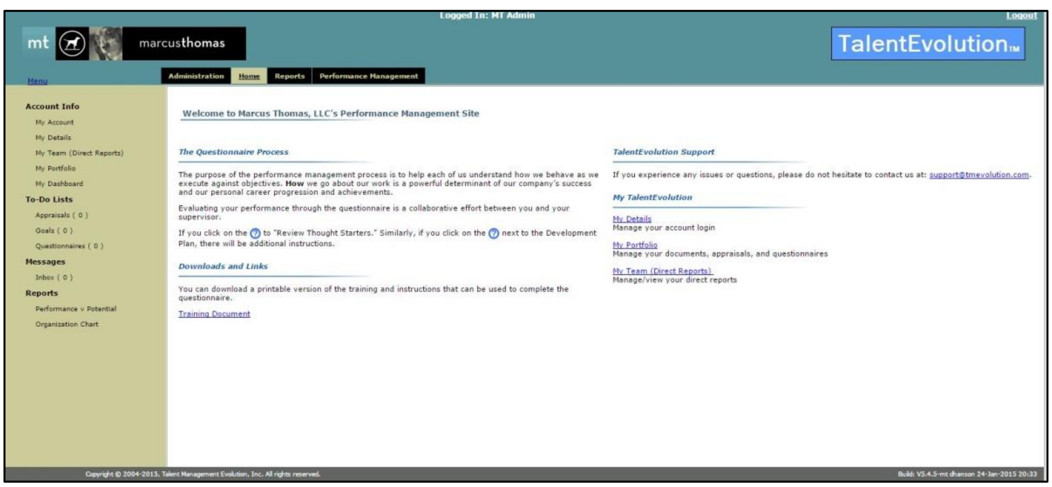
The Individual Contributor (IC) Level Development Plan / MAM Statement of Intent Process

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.

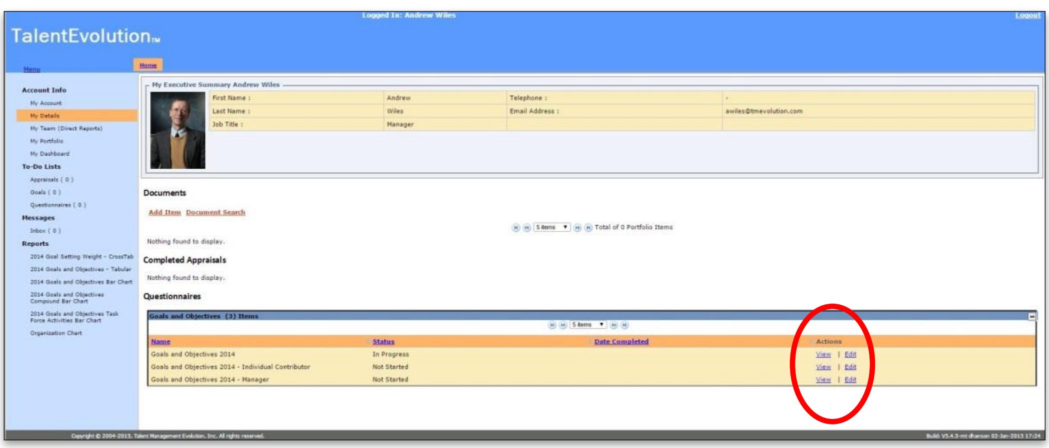
    b. Below is a screenshot of your Home page.



2) In the navigation panel on the left, click on 'My Portfolio' or via the link on the 'Home' page upon entering the application.

* 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.

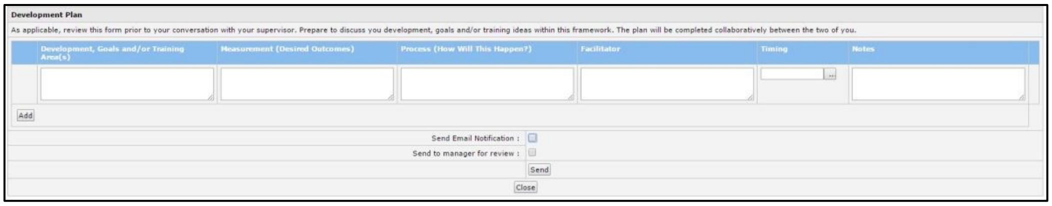
3) In the 'Development Plan / MAM Statements' area, a list of forms to be completed are held. Click the "Edit" button of the form to be answered.



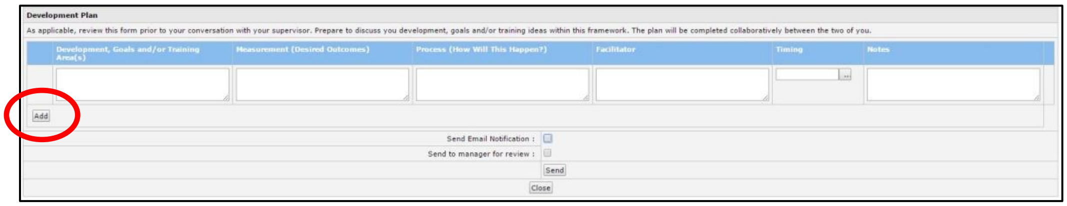
   a. Both the Development Plan and Make a Mark Statement of Intent forms are found here.

The Development Plan

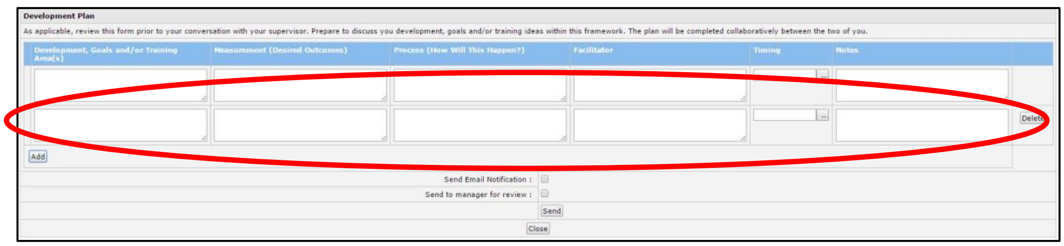
1) In the Development Plan form, fill in the textboxes with the desired information.



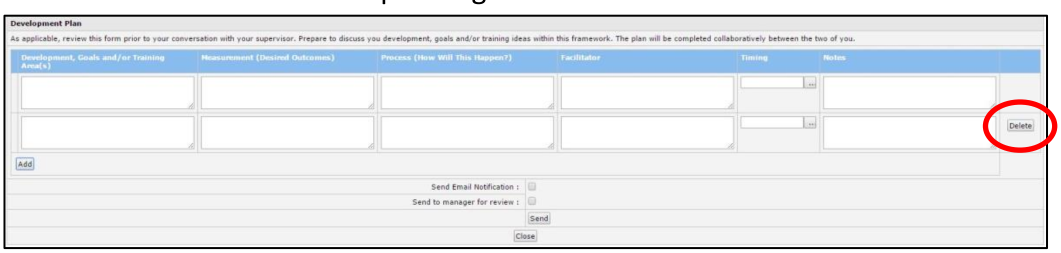
2) If there are multiple Developmental or Training Goals, an "Add" button is located under the row. Click "Add" to add another row.



3) A new row will appear, allowing another 'Development, Goals and/or Training Area(s),' 'Measurement,' 'Process,' 'Facilitator,' 'Timing,' and 'Notes' areas to be entered in.

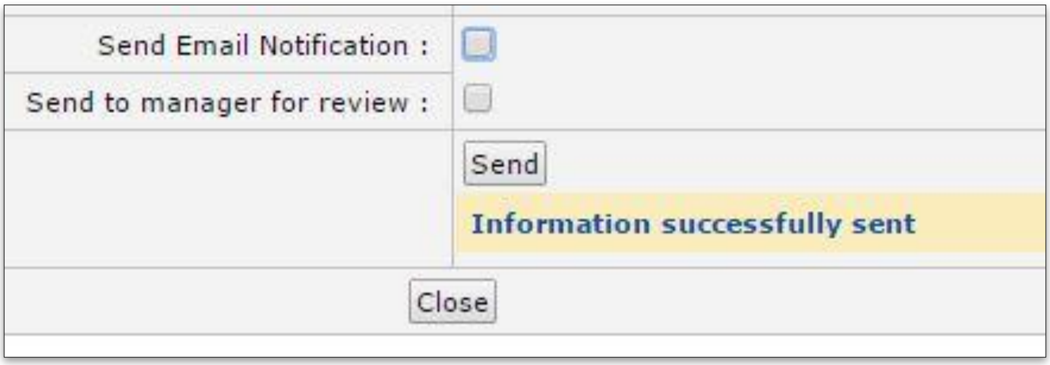


4) If an additional row was added by accident, clicking on the "Delete" button at the end of the row will delete the corresponding field row.



5) Continue this process for every goal and training desired.
6) When all desired fields are filled in, 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



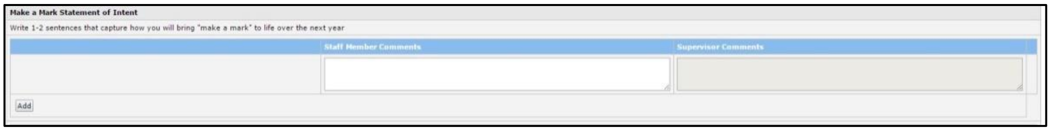
b. If the checkboxes are not checked and the form is not sent, the supervisor is not notified and will not know to complete the process!

7) Click the "Close" button to close the editing process of the form.
8) 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.

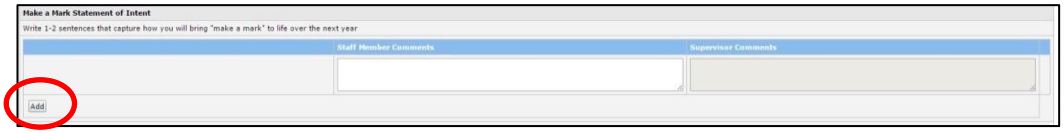
9) Once all forms have been completed and the "Send" button has been clicked, the process is sent on to the supervisor for review.

Make a Mark Statement of Intent

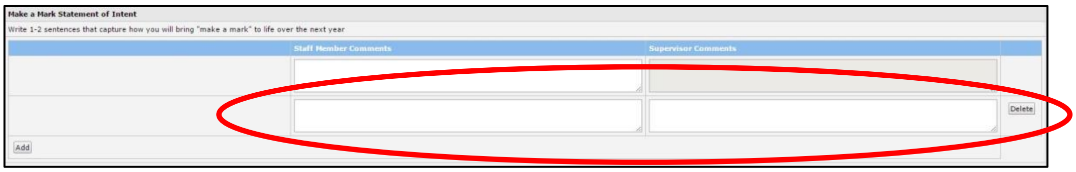
1) In the Make a Mark Statement of Intent form, fill in the 'Staff Member Comments' field with the desired information.



2) If additional comment fields are desired, click on the “Add” button at the bottom of the row.



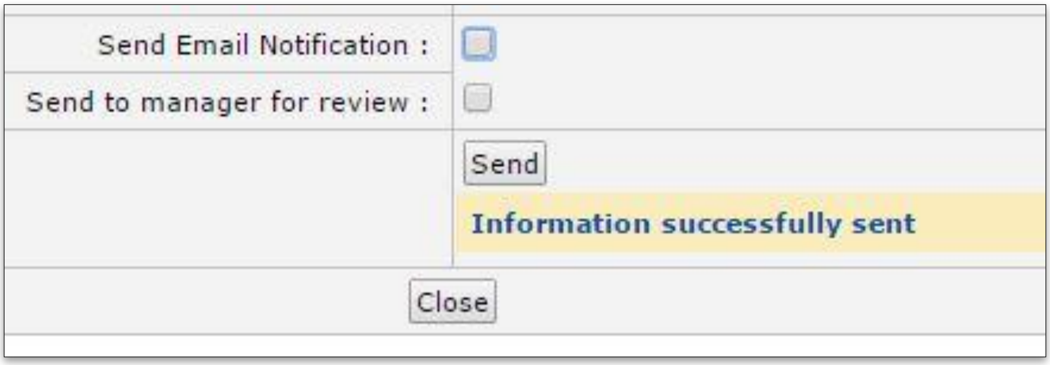
3) A new row will appear, allowing a new comment to be entered.



4) If an additional row was added by accident, clicking on the “Delete” button at the end of the row will delete the corresponding field row.

5) Continue this process for every comment field desired.
6) When all desired fields are filled in, 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 the form is not sent, the supervisor is not notified and will not know to complete the process!

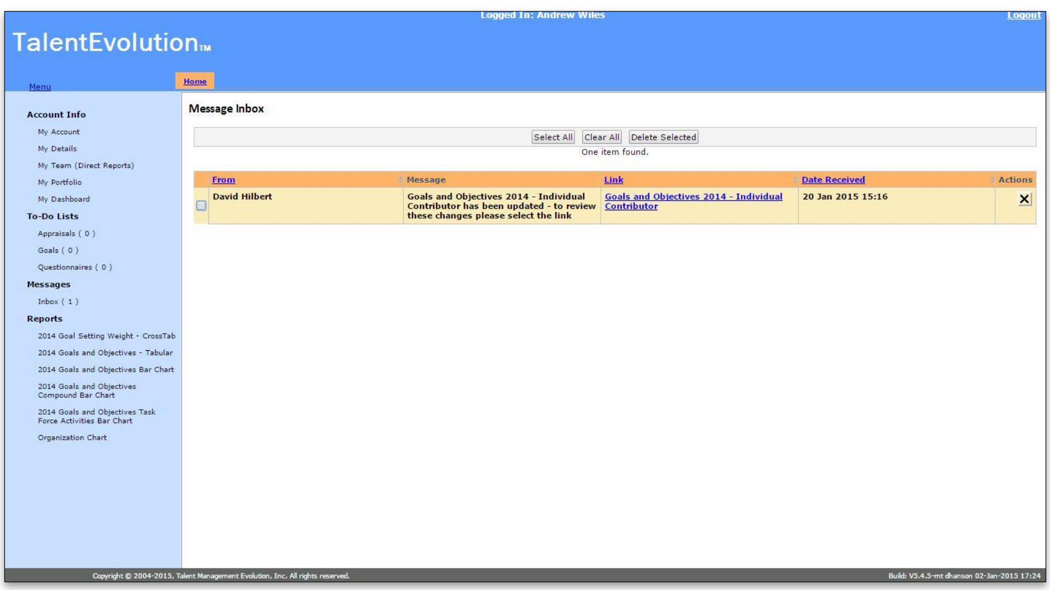
7) Click the "Close" button to close the editing process of the form.
8) From here, a PDF version of the report can be downloaded by clicking on the "Export PDF" button at the top of the page. Editing can continue by clicking on the "Edit" button or pressing the "Back" button will return to the 'My Portfolio'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

9) Once all forms have been completed and the "Send" button has been clicked, the process is sent on to the supervisor for review.

Follow-up Process

1) Once the supervisor has attended to the form and the form is sent back to the individual for review, the form can be found in the individual's inbox on the 'Home' tab.

2) The individual can access the supervisor-completed form by clicking on the link provided in the 'Inbox.'



3) Or the individual 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

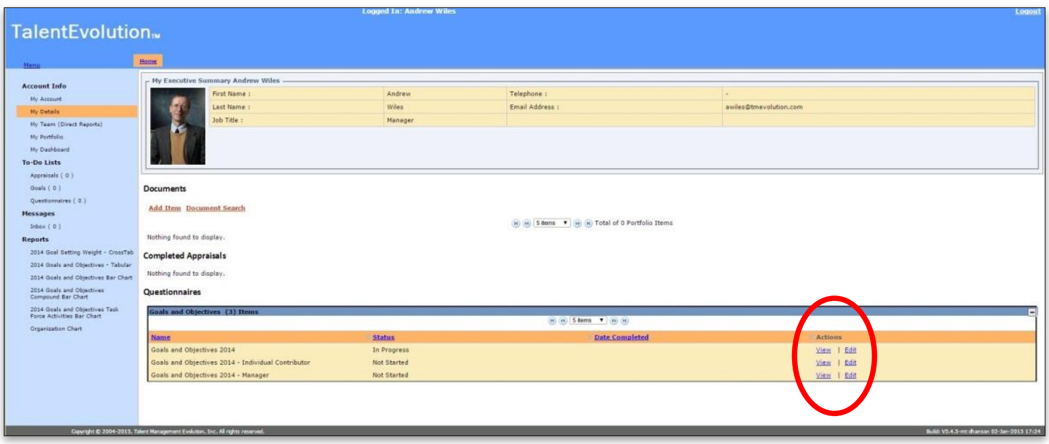
4) The individual and the manger continue sending the form back-and-forth until both parties agree on the form and are satisfied with its contents.
5) The individual is then done with the process. The form will remain in 'My Portfolio' for each individual until the form has been 'Archived.'

Editing the Forms

Individual Initiated Change

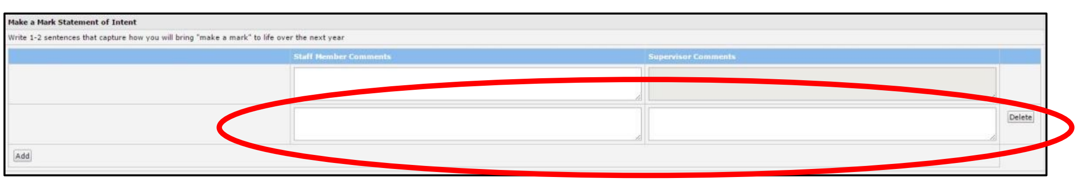
If, during the year, a goal, objective, or Make a Mark comment needs to be updated, the individual can add an addendum to the form.

1) In 'My Portfolio,' the individual can select the form that requires updating and click on "Edit."

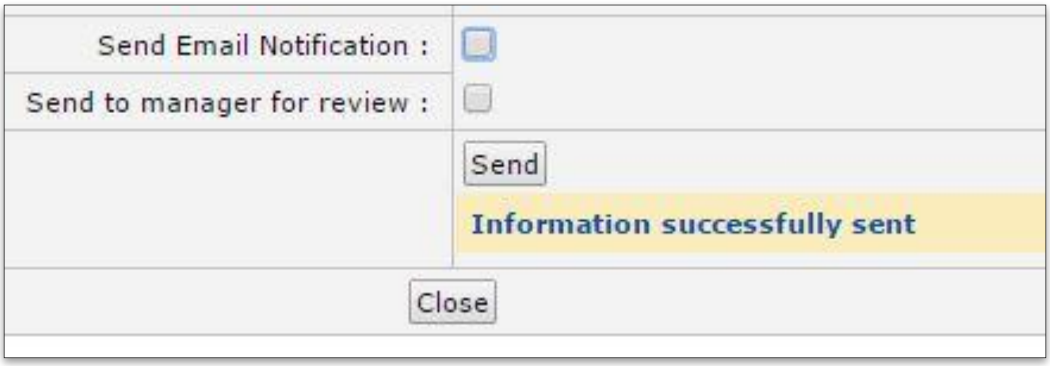


2) Under the goal or objective being modified, click on the "Add" button within that group.

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.
6) The supervisor will be able to review the changes and approve, as in the Follow-Up Process explained previously.

Supervisor Initiated Change

The supervisor can also initiate a change / update to the form. The individual will be notified by email and a link to the form will be provided. Additionally, the individual can access the updated form via his/her ‘Inbox’ on the ‘Home’ tab (see Follow-Up Process for step-by-step instructions on how to check the ‘Inbox’).