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## TandemPerform 2.0

### *Guide to Performance Assessments*

# Performance Assessments Overview

- TandemPerform is an online tool for completing performance assessments and multi-rater (180, 360) assessments.
- The timing of assessments is determined by your organization and aligned with your objectives.
- 360 assessments are used to obtain comprehensive feedback to help you strengthen your leadership capabilities and behaviors. In these assessments, you, your manager, peers, and subordinates complete the assessment.

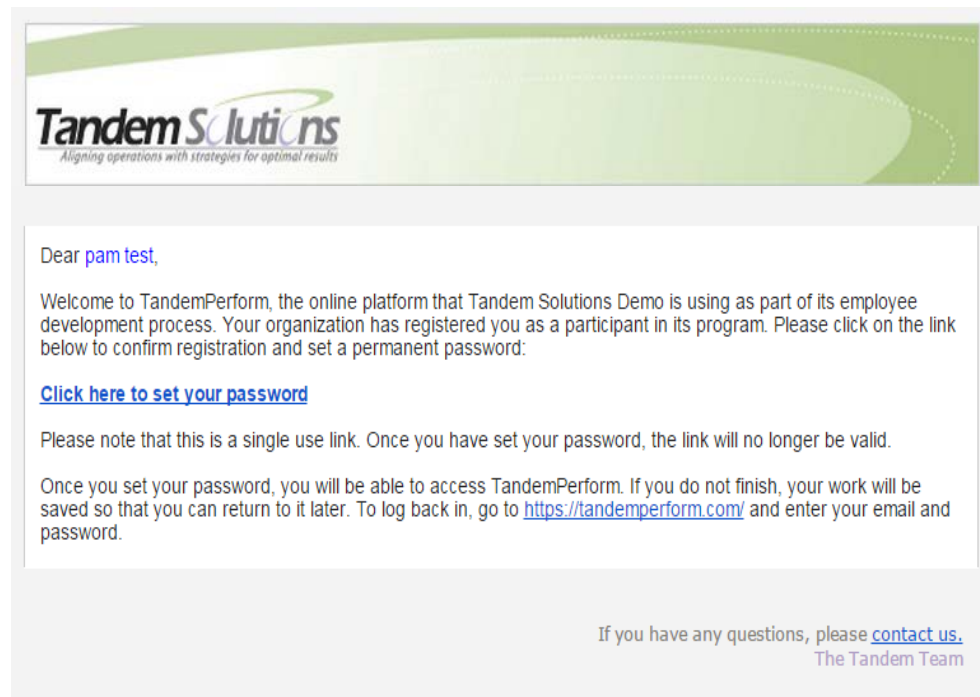


# Initial Welcome Email/Set Password

An initial welcome email is sent to each participant when they are 'activated'. The welcome email outlines the steps for gaining access to your TandemPerform account.

## Actions

1. Click on the link in the email to 'set password' for your account.



# Set up Password for Account

## Actions

1. Enter your password twice to confirm its accuracy.

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**CHANGE PASSWORD**  
Please enter your new password. It must at least be **Normal** strength.

User pams+test@tandem-solutions.com

New Password

New Password (again)

[Need help? Contact Us](#)

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## Tips

- After you have set your password the link in the welcome email is invalid for security purposes.
- Password strength is determined by your organization and is set to weak, normal, moderate or strong.
- Click on 'Contact Us' if you need technical support. This is available on all screens in TandemPerform.

# Login to TandemPerform

## Actions

1. [Go to http://tandemperform.com](http://tandemperform.com)
2. Enter your email address and password.
3. If you forget your password, click on Forgot Password and you will be sent an email with a link to set up a new one.

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**LOGIN**  
Please enter your User ID and Password

E-mail / User

Password

[Forgot Password](#)

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Need help? [Contact Us](#)

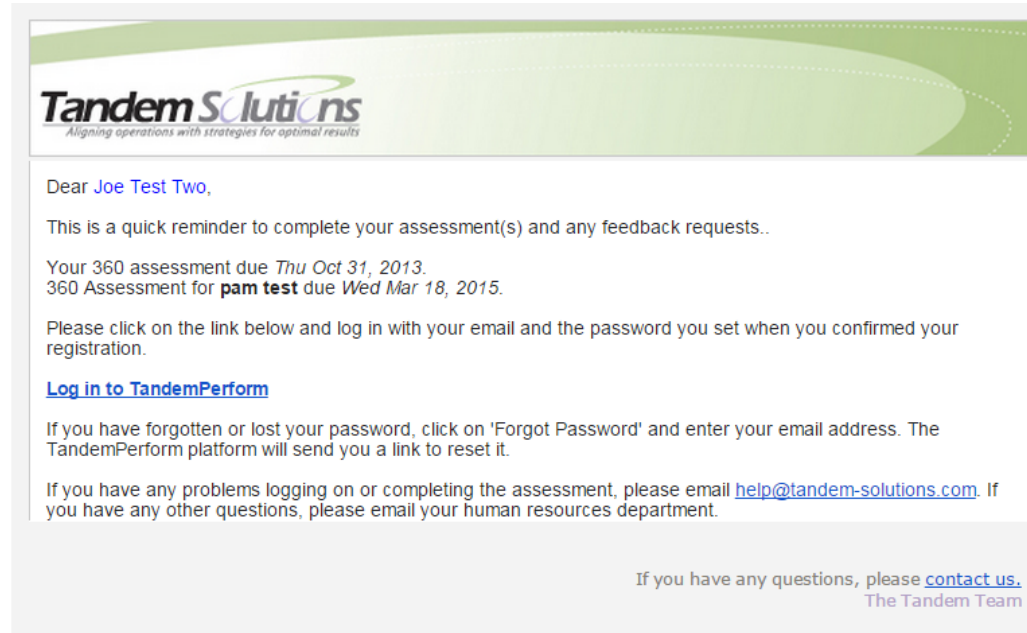
## Tips

- After you have set your password the link in the welcome email is invalid for security purposes.
- You will need to go to the main login screen to gain access.
- Your user name is the email address at your organization.

# Weekly Assessment Reminder

## Actions

1. Read the email to determine how many assessments you need to complete and when.
2. Click on the link to get quick access to TandemPerform.



# TandemPerform Homepage

## Actions

1. Read the home page for a brief description of each tab.
2. Click on the appropriate tab to complete your intended action.

The screenshot shows the TandemPerform homepage for ABC Company. At the top left is the ABC Company logo. At the top right, it says "Welcome, pam test" with a "Logout" link. Below this is a navigation bar with tabs: HOME (highlighted), MY ASSESSMENTS, GIVE FEEDBACK, MY GOALS, and GOAL FEEDBACK. The main content area contains a welcome message and several sections: "My Assessments", "Give Feedback", "My Goals", and "Goal Feedback". At the bottom left is the Tandem Solutions logo with the tagline "Aligning operations with strategies for optimal results". At the bottom right, it says "Need help? [Contact Us](#)".

ABC Company

Welcome, pam test [Logout](#)

**HOME** MY ASSESSMENTS GIVE FEEDBACK MY GOALS GOAL FEEDBACK

**Welcome to TandemPerform**  
Welcome to the home page for TandemPerform . ABC Company is using this online tool to enable its annual performance improvement process. Each tab is explained below.

**My Assessments**  
This indicates assessments you need to complete for yourself. This may be a self evaluation or a 360 assessment. A number in a red square above this tab indicates how many new assessments you have to complete.

**Give Feedback**  
These are the assessments you need to complete for others. When you need to complete an annual performance evaluation, you will click here to find the list of assessments you need to complete. A number in a red square above this tab indicates how many new assessments you have to complete.

**My Goals**  
This is where your development goals are entered and updated throughout the year.

**Goal Feedback**  
This is the list of goals that others have shared with you. You may view or provide feedback on these goals at any time.

For video tutorials and other reference materials to help you learn how to use TandemPerform to complete your assessments, please consult the [Online Help Page](#).

If you need additional help, please email [help@tandem-solutions.com](mailto:help@tandem-solutions.com) or contact your Human Resources Generalist.

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# My Assessments Tab

## Actions

1. Click on a completed assessment you would like to review.
2. Click on an assessment you need to complete, such as a self assessment.

ABC Company

Welcome, pam test [Logout](#)

HOME MY ASSESSMENTS GIVE FEEDBACK MY GOALS GOAL FEEDBACK

Type:  Status:

RECEIVED	ID	TYPE	PARTICIPANTS	FINISH BY	STATUS	DATE	ACTIONS
03/19/2015	11938	Performance	Pam Somerville	03/19/2015	Overdue	03/19/2015	
03/18/2015	11932	Performance	Test Three	03/19/2015	Completed	03/18/2015	
03/18/2015	11931	360	4 People	03/18/2015	1/4 Completed	03/18/2015	
















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# Give Feedback Tab

## Actions

1. Click on the assessment for the person you need to give feedback.
2. You may take one of the following actions for each assessment:
  - Access the assessment to complete it.
  - Email it to another person.
  - Download the pdf to print.

RECEIVED	ID	TYPE	PERSON	FINISH BY	STATUS	DATE	ACTIONS
09/02/2014	9223	Performance	PCC Test 1	09/05/2014	Overdue 57/59	09/02/2014	  
12/12/2013	4950	Performance	PCC Test 4	12/12/2013	Overdue 0/29	12/12/2013	  
10/22/2013	4387	360	Mock Care Team	10/25/2013	Overdue 1/27	10/22/2013	  
02/02/2012	247	360	PCC Test 1	04/27/2012	Closed	03/27/2013	 
02/02/2012	246	360	PCC Test 1	03/31/2012	Closed	03/27/2013	 
05/17/2011	194	360	PCC Test 1	05/18/2011	Closed	03/27/2013	 





## Tips

- You may filter by type of assessment (eg., performance or 360), or person or status of the assessment.
- When filtering by status of assessment, you may sort by:
  - ✓ Invited
  - ✓ In Process
  - ✓ Cancelled
  - ✓ Closed
  - ✓ Overdue

# My Goals Tab

## Actions

1. Click on the goal you want to access.
2. You may take the following actions for each goal:
  1. Access the goal to add the appropriate detail.
  2. Share the goal with another person to get feedback on your performance related to the goal.
  3. Provide a status update on the goal.
  4. Download the pdf to print the goal summary.

START	ID	GOAL	FINISH BY	STATUS	DATE	UPDATES	UPDATED	ACTIONS
03/18/2015	19052	test goal		Planned	03/18/2015	<a href="#">Q</a>		   

## Tips

- You may filter by goal name or status.
- When filtering by goal status you may filter by:
  - ✓ Planned
  - ✓ In process
  - ✓ Cancelled
  - ✓ Completed

# Goal Feedback Tab

## Actions




1. Click on the goal you are interested in. You have the option to:
  - View Goal: see what the employee has written. Easiest to review the Summary tab.
  - View Team: see who else is providing feedback- if others have provided feedback – then it will be on the summary page.
  - Status Updates: provide an update/feedback about the goal.
  - Print the summary report

ABC Company  
Welcome, Test Three [Logout](#)

HOME MY ASSESSMENTS **1** GIVE FEEDBACK **2** MY GOALS GOAL FEEDBACK

ID:  Request By:  Status:

Goal:

REQUESTED BY	ID	GOAL	START	FINISH BY	STATUS	DATE	UPDATES	UPDATED	ACTIONS
pam test	19063	test	03/18/2015		Planned	03/18/2015	<a href="#">0</a>		  

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## Tips

- Search for a particular goal by ID, person, goal name or status

# Access a Performance Assessment

## Actions

1. Once you have selected the performance assessment you need to complete, read the overview and assessment rating scale definitions.
2. Click on Start and begin the assessment.

## Tips

The screenshot shows a web interface for 'ABC Company'. At the top right, it says 'Welcome, Pam Somerville Logout'. Below this is a navigation bar with 'HOME', 'MY ASSESSMENTS', 'GIVE FEEDBACK' (highlighted with a red '1'), 'MY GOALS', and 'GOAL FEEDBACK'. The main content area is titled 'Assessment for pam test' and contains an 'OVERVIEW' section with a list of sections: 'Organizational Value Standards', 'Job Specific Accountabilities', 'Mandatory Requirements', and 'Summary of Performance Feedback'. Below this is a 'RATING SCALE' section with instructions and definitions for 'E = Consistently Exceeds the standard', 'M = Meets and/or Exceeds the standard', and 'O = Occasionally Meets the standard'. A 'START' button is circled in red at the bottom right of the main content area. The footer includes the Tandem Solutions logo and the text 'Need help? Contact Us'.

# Complete a Performance Assessment

## Actions

**Step 1:** Review any previous assessments.

**Step 2:** Rate and provide comments for last year's goals.

ID	TYPE	EVALUATED BY	STATUS	DATE	VIEW
11932	Performance	Test Three	Completed	03/18/2015	

Page 1 1 to 1 of 1

Section 1 / 16 SAVE / NEXT SECTION

## Tips

- You may begin anywhere in the assessment by clicking on the title of the category.
- Read any previous assessments that may be helpful to evaluate the person's performance. Just click on the pdf.
- When reviewing goals from last year, click on the drop down menu to rate the goal achievement. Then provide feedback in the text box.

Assessment for pam test Submit by Tue Mar 31, 2015

REVIEW	ORGANIZATIONAL VALUES	KEY CAPABILITIES	SUMMARY
Review Previous Assessments	Excellence (0/4)	Job Knowledge/Execution (0/2)	Overall Performance Rating
Review Goals from Last Year	Customer Centric (0/4)	Business Analysis (0/2)	Overall Summary (0/2)
	Respect, Trust, & Dignity (0/4)	Work Planning (0/2)	Goals for Following Fiscal Year, including Business and Development Goals
	Employee Growth & Well Being (0/4)	Quality Outcomes (0/2)	Employee Comments
	Organizational Values Feedback (0/1)	Key Capabilities Feedback (0/1)	

Review Goals from Last Year

Review SAVE

Expand All Collapse All

1. learn TP navigation Rate:

# Complete a Performance Assessment

## Actions

3. Rate each item of the assessment using the abbreviated rating scale defined by your organization.

ORGANIZATION VALUE STANDARDS	JOB SPECIFIC ACCOUNTABILITIES	MANDATORY REQUIREMENTS	SUMMARY
Innovation (0/3)	People (0/2)	Core Requirements (0/7)	Summary of Performance Feedback (0/2)
Collaboration (0/3)	Service (0/7)	Functional Requirements (0/2)	Development Plan (0/2)
Accountability (0/3)	Quality (0/3)	Compliance Standards (0/6)	Overall Rating (0/1)
Respect (0/3)	Finance (0/4)		
Excellence (0/3)	Innovation (0/7)		

Organization Value Standards ▾ Innovation

Open to change and risks associated with it.

Generates and volunteers ideas and potential solutions for improving operations.

N/E O M E

N/E O M E

SAVE ?

## Tips

- Click on the title of each section for direct access to that section.
- Counters (0/3) indicate number of questions per section and how many you have answered.
- Click save/next section at the bottom of the screen to move through the assessment.
- You must complete all questions in order to 'submit' the assessment.
- Click on "help" tips to help you through the assessment.

# Complete a Performance Assessment

## Actions

4. Provide performance feedback in text boxes where indicated.

ORGANIZATION VALUE STANDARDS	JOB SPECIFIC ACCOUNTABILITIES	MANDATORY REQUIREMENTS	SUMMARY
Innovation (0/3)	People (0/2)	Core Requirements (0/7)	Summary of Performance Feedback (0/2)
Collaboration (0/3)	Service (0/7)	Functional Requirements (0/2)	Development Plan (0/2)
Accountability (0/3)	Quality (0/3)	Compliance Standards (0/6)	Overall Rating (0/1)
Respect (0/3)	Finance (0/4)		
Excellence (0/3)	Innovation (0/7)		

Summary ▾ Summary of Performance Feedback SAVE

Summarize performance feedback by highlighting the employee's strengths, progress, and achievements.

give feedback here

## Tips

- If you are taking more than 10 minutes typing your feedback, click on **save** to ensure your work is saved. Depending how your organization sets up browser settings, you may get “shut out” after 15-20 minutes.

# Complete a Performance Assessment

## Actions

**Step 5:** Propose goals for next year.

**Step 6:** Provide an overall rating.

Assessment for **pam test** Submit by **Thu Mar 19, 2015**

REVIEW	ORGANIZATIONAL VALUES	KEY CAPABILITIES	SUMMARY
Review Previous Assessments Review Goals from Last Year	Excellence (0/3) Customer Centric (0/3) Respect, Trust, & Dignity (0/3) Employee Growth & Well Being (0/3) Organizational Values Feedback (0/3)	Job Knowledge/Execution (0/3) Business Analysis (0/3) Work Planning (0/3) Quality Outcomes (0/3) Key Capabilities Feedback (0/3)	Overall Performance Rating Overall Summary (0/1) Goals for Following Fiscal Year, including Business and Development Goals Employee Comments

Summary > **Goals for Following Fiscal Year, including Business and Development Goals**

**Suggest a Goal**

Enter the name of the goal in the "Goal" field. It should be clear and brief. Use the "Specific" field below to clearly define what needs to be accomplished. Identify the specific reasons, purpose or benefits of accomplishing the goal.

Goal  
Specific

## Tips

- Write your concise, SMART goal in the space provided. The Goal box allows up to 100 characters.
- The Specific box is optional and intended to provide additional information or context about the goal as needed.
- The overall rating is not calculated for you. It is up to you to determine the overall performance rating.

Assessment for **pam test** Submit by **Thu Mar 19, 2015**

ORGANIZATION VALUE STANDARDS	JOB SPECIFIC ACCOUNTABILITIES	MANDATORY REQUIREMENTS	SUMMARY
Innovation (0/3) Collaboration (0/3) Accountability (0/3) Respect (0/3) Excellence (0/3)	People (0/2) Service (0/7) Quality (0/3) Finance (0/4) Innovation (0/7)	Core Requirements (0/7) Functional Requirements (0/2) Compliance Standards (0/6)	Summary of Performance Feedback (1/2) Development Plan (0/2) Overall Rating (0/1)

Summary > **Overall Rating** SAVE

Overall Rating N/E O M E

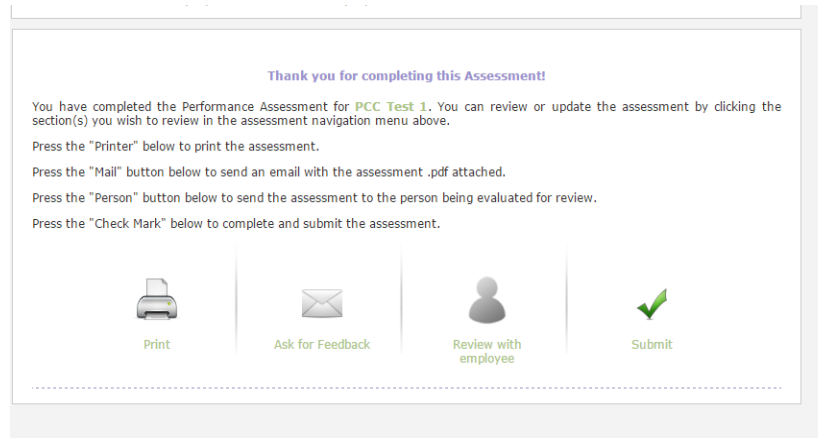
SAVE / PREVIOUS SECTION Section 16 / 16 REVIEW ASSESSMENT



# Review and Submit Assessment

## Actions

1. When finished completing assessment, click on Review Assessment.
2. You may choose from the following options:
  - **Print** the assessment – print the completed assessment
  - **Ask for feedback** – email the assessment for review/comments from another person
  - **Review with employee** – email with the employee before the performance discussion
  - **Submit** – finalizes the assessment and submits it to HR.



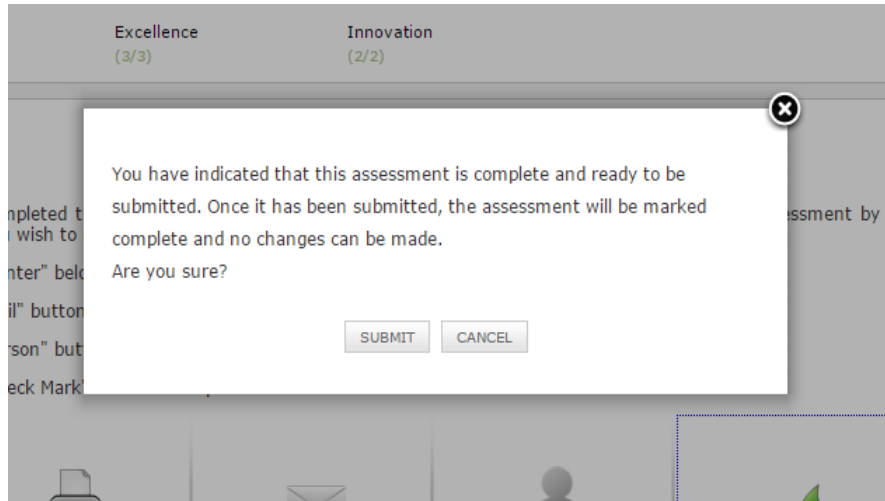
## Tips

- Assessments will show as 'in process until the Submit button is clicked.
- Weekly reminders will continue to be sent to the evaluator until the assessment is 'submitted'.

# Review and Submit Assessment

## Actions

1. Click submit.



## Tips

- Once you submit the assessment, no more changes may be made.
- Meet with your employee before submitting the assessment so that you may make any revisions based on your conversation. Then submit once these revisions are made.
- Once the assessment is submitted, the person you wrote the assessment for – may login to TandemPerform and see their assessment and access their goals.