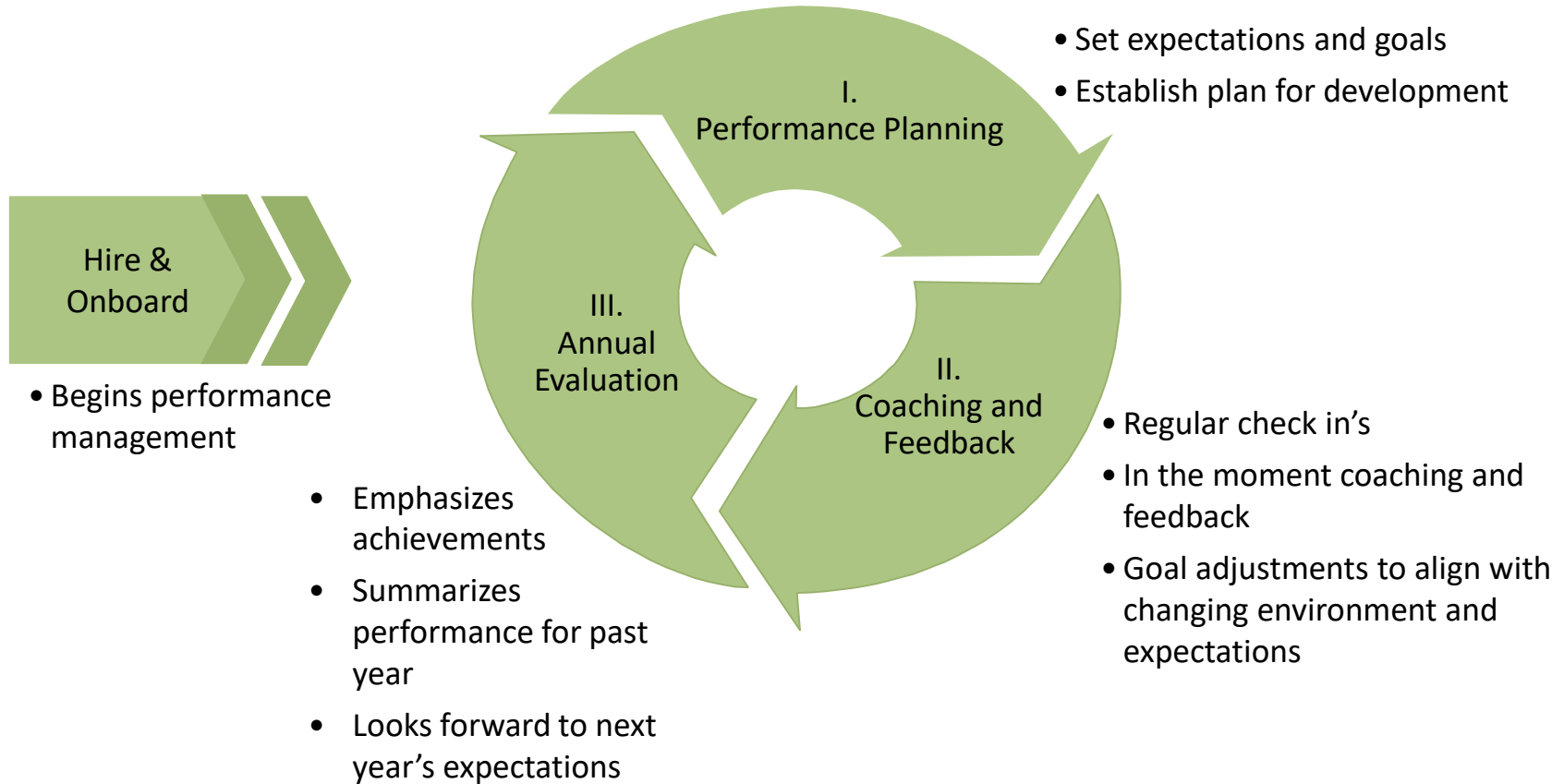


# Overview of TandemPerform

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*Performance management platform that helps you coach and develop others*

# Performance Management Model



## Why do we use TandemPerform?

*TandemPerform's platform enables managers to align, engage and coach others to achieve their potential.*

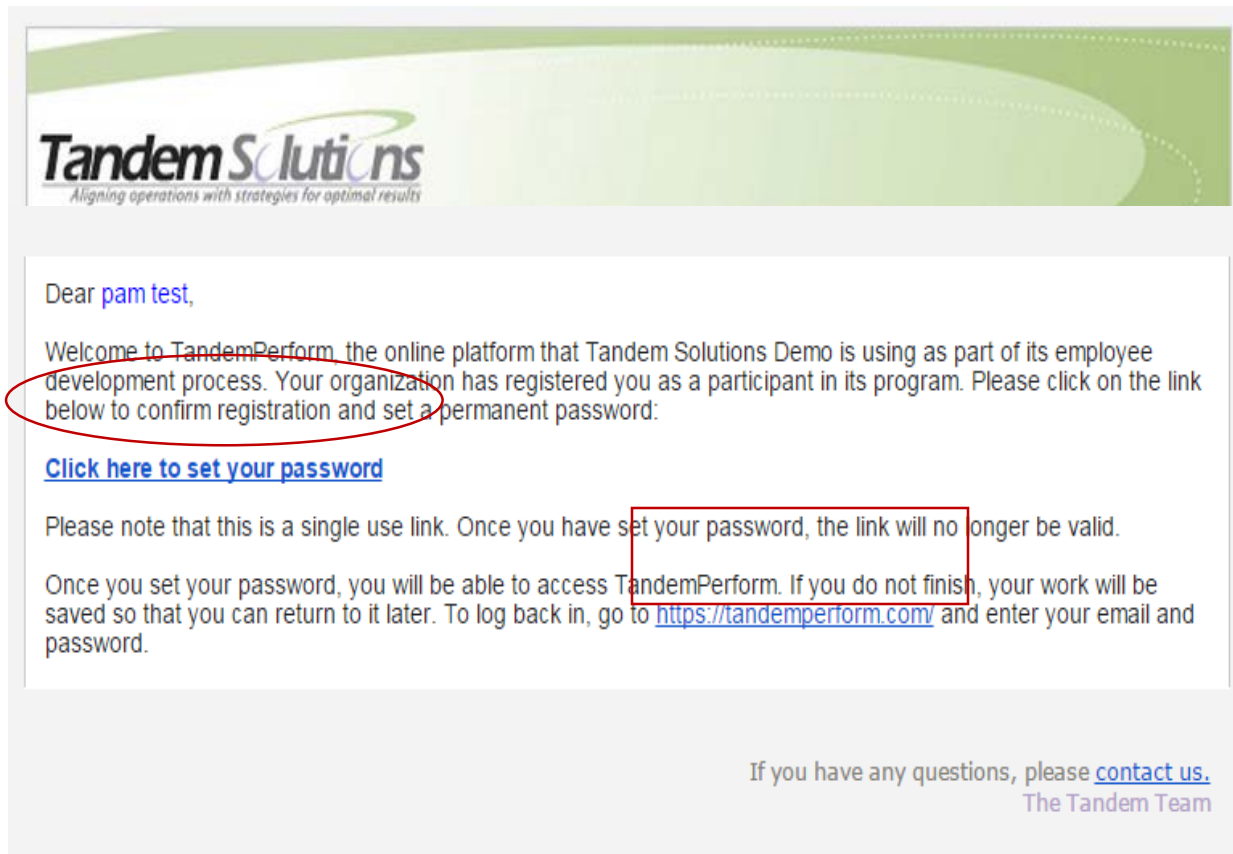
- Formal process for performance evaluation at 90 days and annually
- Formal process for leadership development through 360 assessments
- Goal Setting and Development Planning
- Informal process for real time performance feedback

# Agenda

- Login/Passwords
- Assessments
- Goal Setting/Development Planning
- Real Time Performance Feedback
- Help & Support

# Initial Welcome Email

*You will receive a welcome email when it is time for you to complete an evaluation.*



# Set up your Password for your account

*Passwords must be NORMAL strength or they will not be accepted.*

This means that you will need to use:

- Upper case and lower case letters
- Numbers
- Special character

It is usually best to split a word with a special character, e.g., Per1form2\*

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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)

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# Let the Home Page guide you

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.

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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](#).

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# My Assessments tab

*Click on the assessment you need to complete for yourself. Your completed assessments are also located here for you to access.*

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

Click on the assessment for the person you need to give feedback.

HOME MY ASSESSMENTS <sup>1</sup> GIVE FEEDBACK MY GOALS GOAL FEEDBACK

Type:  Person:  Status:

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	 

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## Actions

- Access the assessment to complete it
- Email it to another person
- Download the pdf to print

**Tip:** filter assessments by status, person or type to locate the one you need most quickly.

# Assessments

*Each type of assessment consists of core criteria important for success.*

## Annual Evaluation

- Review
  - ✓ Previous Assessments
  - ✓ Goals from Last Year
- Values/Behaviors
- Job Accountabilities
- Mandatory Requirements
- Performance Summary
- Goals for Next Year
- Confidentiality Statement

## 90 Day Evaluation

- Values/Behaviors
- Job Accountabilities (shortened)
- Mandatory Requirements (shortened)
- Goals for Next Year
- Performance Summary

## 360 Assessment

- Input from supervisor, self, peers, subordinates and key stakeholders
- Values/Behaviors
- Open Ended Feedback

# Annual Evaluation sections and navigation

Click on the navigation bar to easily toggle from one section to another.

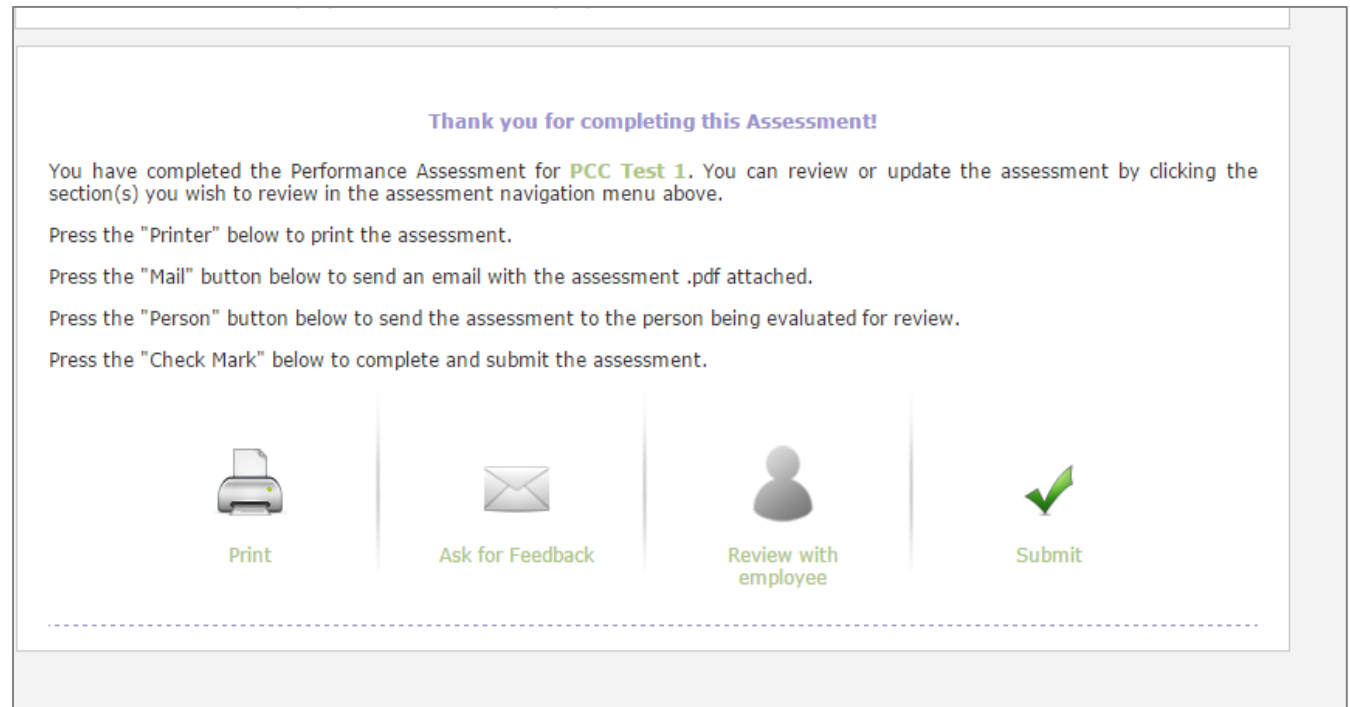
The screenshot displays a web interface for annual evaluations. At the top, a navigation bar includes links for HOME, MY ASSESSMENTS (highlighted with a red '1'), GIVE FEEDBACK, MY GOALS, and GOAL FEEDBACK. Below this, the main content area is titled 'Assessment for PCC Test 1' with a submission deadline of 'Fri Mar 27, 2015'. The assessment is organized into five columns: REVIEW, ORGANIZATION VALUE STANDARDS, JOB SPECIFIC ACCOUNTABILITIES, MANDATORY REQUIREMENTS, and SUMMARY. The REVIEW column contains links for 'Review Previous Assessments' and 'Review Goals from Last Year'. The ORGANIZATION VALUE STANDARDS column lists categories like Innovation, Collaboration, Accountability, Respect, and Excellence, each with a score of 3/3. The JOB SPECIFIC ACCOUNTABILITIES column lists categories like People, Service, Quality, Finance, and Innovation, with scores of 1/1 or 2/2. The MANDATORY REQUIREMENTS column lists Core and Functional Requirements with scores of 12/12 and 3/3. The SUMMARY column includes 'Summary of Performance Feedback (2/2)', 'Goals for Next Period', and 'Overall Rating'. Below the assessment details, there is a 'Review' section with a dropdown menu set to 'Review Previous Assessments'. This section contains a table of assessment records.

ID	TYPE	EVALUATED BY	STATUS	DATE	VIEW
11911	Performance	PCC Test1	Completed	04/28/2015	
11819	Performance	PCC Test 4	Completed	03/05/2015	
9222	Performance	PCC Test 1	Completed	09/02/2014	

# Review and Submit assessment

## Actions

- **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 in TandemPerform as completed



**Thank you for completing this Assessment!**


You have completed the Performance Assessment for **PCC Test 1**. You can review or update the assessment by clicking the section(s) you wish to review in the assessment navigation menu above.


Press the "Printer" below to print the assessment.


Press the "Mail" button below to send an email with the assessment .pdf attached.


Press the "Person" button below to send the assessment to the person being evaluated for review.

Press the "Check Mark" below to complete and submit the assessment.

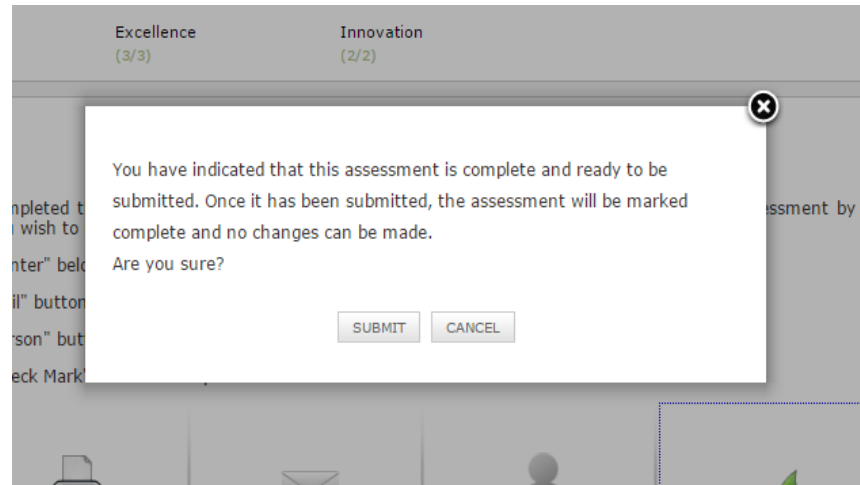
 **Print**

 **Ask for Feedback**

 **Review with employee**

 **Submit**

# Review and Submit Assessment



## Tips

- 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.
- Assessments will show as 'in process until the Submit button is clicked. Automated weekly reminders will continue to be sent to the evaluator until the assessment is 'submitted'.
- Once you submit the assessment, no more changes may be made.
- Once the assessment is submitted, the person you wrote the assessment for – may login to TandemPerform and see their assessment (My Assessment Tab) and access their goals (My Goals Tab).

# Goals & Development Planning Process

*The goals platform fosters a partnership approach to goal setting & monitoring.*



## Annual Evaluation

- The supervisor evaluates goals from last year.
- The supervisor inputs goals for next year on the annual evaluation. (In discussion with the employee). These goals will then populate the Review Goals section in next year's annual evaluation for comment/rating.

## Outline Plan to Achieve Goals

- Once the annual evaluation is 'submitted', the employee enters in the details for a SMART goal.
- Supervisors reviews with employee to ensure it accurately reflects conversation.

## During the Year

- The employee updates the goals during the year to reflect conversations with the supervisor. Provides updates and change in status of the goal as appropriate.
- If a goal is added during the year, then the employee needs to 'share' it with their supervisor for them to be able to see status and provide feedback.
- Goals input into the annual evaluation for next year are accessible to the supervisor to see and provide feedback.

# Goals & Development Planning

*Use SMART principles to set and monitor your goals & plans.*

Goal For **pam test**

Goal

Status  Last Update March 24, 2015 Target Date

**Specific** **Measurable** **Achievable** **Relevant** **Timely** **Summary**

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

- Employee completes the details of the SMART tabs.
- Set automated reminder. If the employee does not check off reminders – the system defaults to monthly.
- Simply 'reply' to the automated email reminder and the data will be uploaded to the summary.
- Use the summary as a 'diary' of progress and decisions during the year.
- Supervisor can view the details and summary of goals for their team members.

# Goals & Development Planning

*Let the home page guide you for updating goals and getting real time feedback.*

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Welcome, pam test [Logout](#)

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# Goals & Development Planning

My Goals tab on the home page enables you to add, revise and share your goals for feedback.

*Click on the goal you want to access, share or update. You may also add a new goal here.*

## Actions

- **Access** the goal to add the appropriate detail
- **Share** the goal with another person to get feedback on your performance related to the goal
- Provide a **status update** on the goal
- Download the pdf to print the **goal summary**

HOME MY ASSESSMENTS <sup>1</sup> GIVE FEEDBACK MY GOALS GOAL FEEDBACK

ID:  Goal:  Status:

START	ID	GOAL	FINISH BY	STATUS	DATE	UPDATES	UPDATED	ACTIONS
03/18/2015	19052	test goal		Planned	03/18/2015	0		

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# Goals & Development Planning

*The Goal Feedback tab enables you to provide real time feedback.*

## Actions

- **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 <sup>1</sup> GIVE FEEDBACK <sup>2</sup> 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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## Other Important Information

- 3 tries with the password – then you will be locked out. Our help desk is notified and we will unlock you.
- Completing an assessment = ‘Submit’

Questions Related to:	HR Generalist	Tandem Solutions
• You need additional assistance to get online		
• When performance appraisals are due		
• If you have received an incorrect appraisal to complete		
• You need to set up an appraisal for a new employee		
• You are having technical issues online		

- On every screen in TandemPerform

If you need assistance, please visit our [Help Center](#). You can access our self-service knowledge base to find answers to your questions and submit help requests if you need additional support.

- Another way to get to the help center: [support.tandem-solutions.com](http://support.tandem-solutions.com) – video tutorials, reference materials and FAQ's
- [help@tandem-solutions.com](mailto:help@tandem-solutions.com) – send a ticket