Results!

Manage
(what you do)

Lead
(how you do it)

Strategy

TandemPerform 2.0

Guide to Performance Assessments

Tandem Solutions
Aligning operations with strategies for optimal results

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.

Tandem Solutions
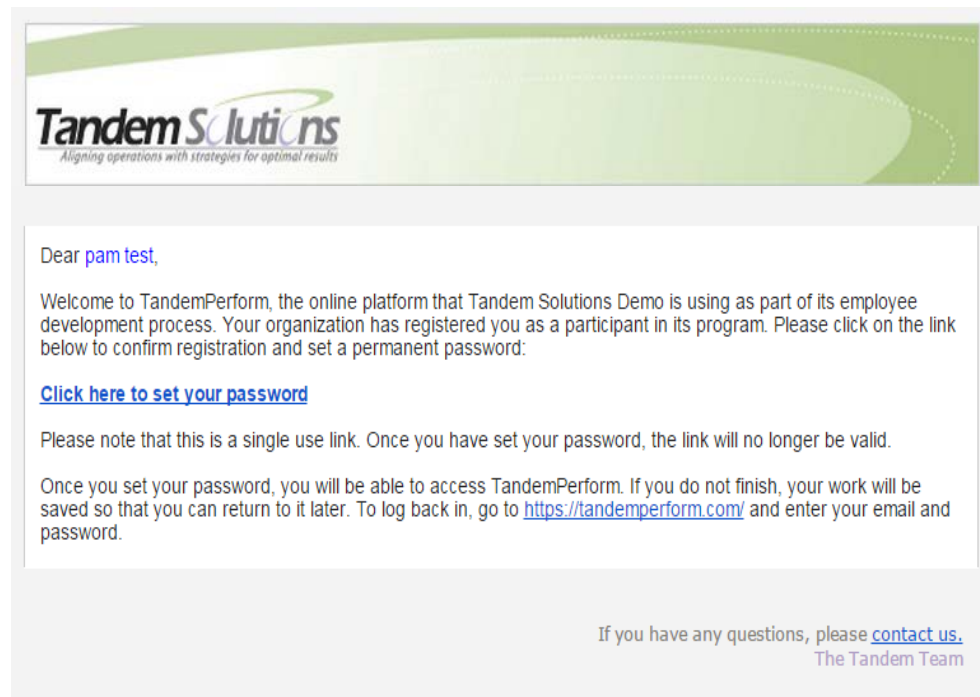*Aligning operations with strategies for optimal results*

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

Dear pam test,

Welcome to TandemPerform, the online platform that Tandem Solutions Demo is using as part of its employee development process. Your organization has registered you as a participant in its program. Please click on the link below to confirm registration and set a permanent password:

Click here to set your password

Please note that this is a single use link. Once you have set your password, the link will no longer be valid.

Once you set your password, you will be able to access TandemPerform. If you do not finish, your work will be saved so that you can return to it later. To log back in, go to https://tandemperform.com/ and enter your email and password.

If you have any questions, please contact us.
The Tandem Team

Set up Password for Account
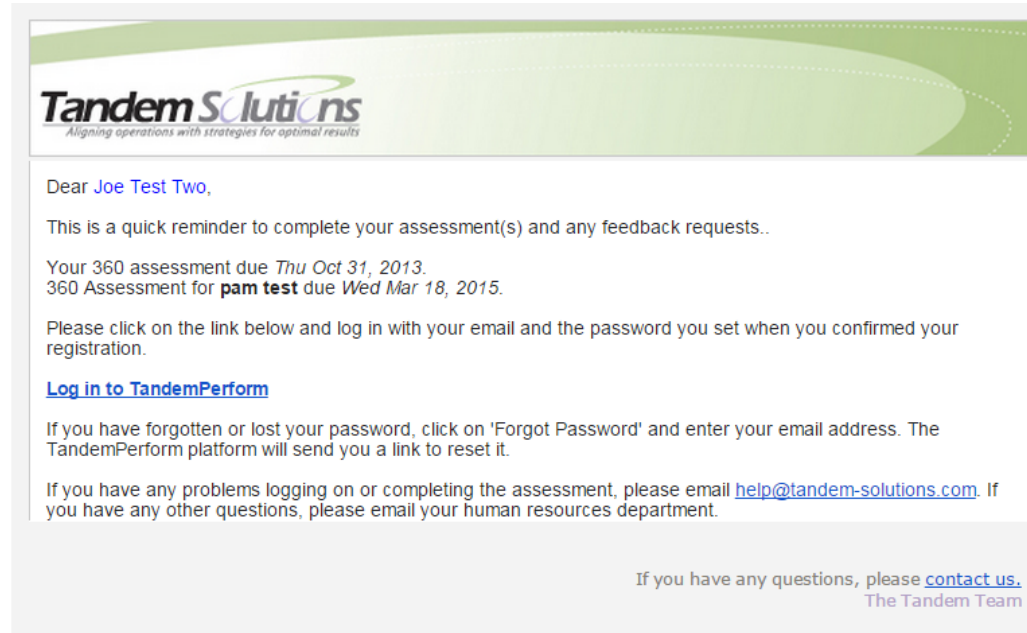
Actions

1. Enter your password twice to confirm its accuracy.

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

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.

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.

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Dear Joe Test Two,

This is a quick reminder to complete your assessment(s) and any feedback requests..

Your 360 assessment due *Thu Oct 31, 2013*.
360 Assessment for **pam test** due *Wed Mar 18, 2015*.

Please click on the link below and log in with your email and the password you set when you confirmed your registration.

Log in to TandemPerform

If you have forgotten or lost your password, click on 'Forgot Password' and enter your email address. The TandemPerform platform will send you a link to reset it.

If you have any problems logging on or completing the assessment, please email help@tandem-solutions.com. If you have any other questions, please email your human resources department.

If you have any questions, please contact us.
The Tandem Team

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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.

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.

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.

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.

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**

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

Complete a Performance Assessment

Actions

Step 1: Review any previous assessments.

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

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.

Complete a Performance Assessment

Actions

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

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

<ins>Actions</ins>

4. Provide performance feedback in text boxes where indicated.

<ins>Tips</ins>

- 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.

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.

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.

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.

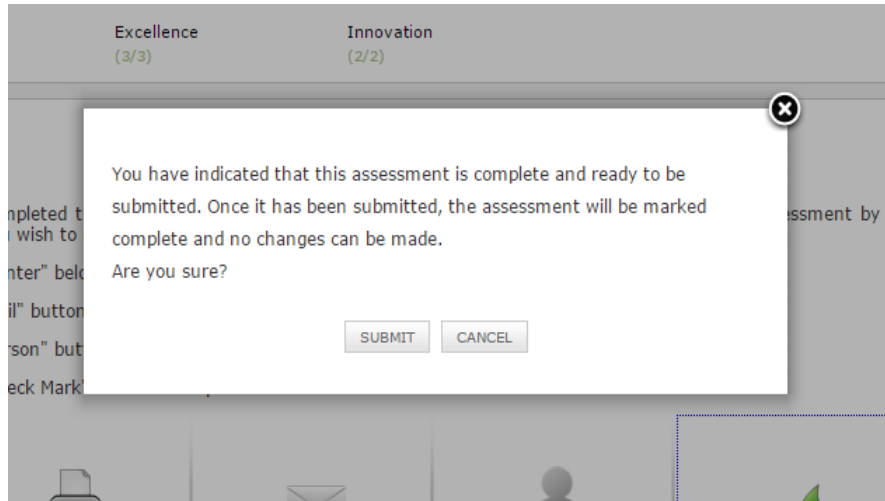| Print | Ask for Feedback | Review with employee | Submit |

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.