TMS Talent Management System Evaluations: Supervisor Guide

As a Supervisor, your role is to create an evaluation on each employee and to review the approved evaluation with the employee. Follow these steps to accomplish this task.

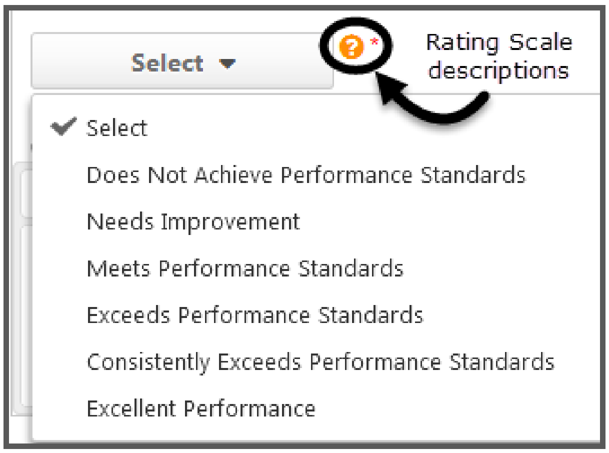
1) Log in by clicking on **Access Talent Management System** in the **Talent Management System** channel in the **Employees** tab in BengalWeb.

2) Click on the **Your Action Items** heading to see the complete list of tasks awaiting your attention. *(Note: the list below the heading may only be a partial list.)*

3) Begin the evaluation by clicking on the employee's name to open the **Overview** page. Pay special attention to the information under the **Supervisor** heading, which describes your role in this process, as well as the **Review Step Progression** chart at the bottom that tracks progress through the evaluation process. Click **Get Started**, bottom right.

4) <u>**Performance Evaluation Job Details**</u>. Type or paste text to fill these required boxes. Text entered here will be carried forward to next year's evaluation. Your response in each section is limited to 500 characters. Click **Save and Continue** to move to next section.

5) <u>**Performance Evaluation Competencies**</u>. Evaluate employee on each of the listed competencies. Employee self-evaluation comments can be seen above the Comments section. For each competency, choose a rating by clicking the **Select** button and then clicking the desired rating. Click the question mark next to the **Select** button to see descriptions of each rating. Enter support for your rating in the **Comments** section. *(Note: If you do not enter comments, your evaluation will be returned to you.)* When you are finished, click **Save and Continue** to move on in the evaluation, or **Save and Exit** to close the evaluation.



6) <u>**Performance Evaluation Goals**</u>: Use this section to set goals for the employee for the next review period. Any goals entered here will be brought forward into the next evaluation, and employees will be able to check their progress on these goals. Create goals using one of two methods: **Regular** and **Wizard**.

- **Regular method**: Click **Add Goals** to open the **Create Goals** window. Complete the Goal by working your way down the screen: Title, Description, Start and Due Dates, Categories, Tasks, and Targets. Click on the icon next to **Categories** to see the 4 Core Themes for ISU, to tie the goal to one of those themes. Each Task or Target must be assigned a weight, and the weights need to add up to 100 for all the tasks or all the targets in each goal.

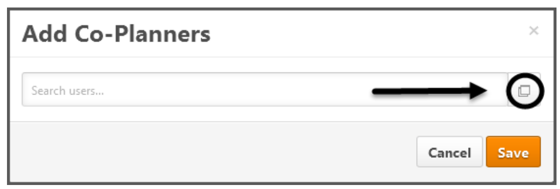
- **Wizard method**: If you are familiar with the SMART goal process, you can click on the **Wizard** button (upper right), which will open a new window to coach you through the SMART goal steps (Specific, Measurable, Actionable, Relevant, and Timely).

When you are finished with a particular goal, click **Save**. Repeat these steps to add additional goals as desired. When you are finished, click **Save and Continue** (*do NOT click Submit yet*).

7) **<u>Summary:</u>** This shows the employee's overall rating, calculated from the individual ratings you entered. Once you have reviewed the rating, click **Submit***. This moves the evaluation on to the next person in the list.

***<u>Co-Planners</u>**: If someone else will also be responsible for evaluating this employee (due to dual report positions, for example), **do NOT complete step 7**, above until the Co-Planner has done his/her evaluation. Follow these steps to add a Co-Planner to this evaluation.

1. Click **Options** in the upper corner of the **Summary** screen, and from the drop down list select **Add Co-Planners**. Click on the search icon at the far right of the field to open a search window.



2. Type in the name, position, or manager you want to add and click on the magnifying glass icon, right.

3. Click on the name you want to add from the list of people who match your search.

4. You can add additional Co-Planners by searching again, or hit **Save** to save your selection.

5. To delete a co-planner, click on the x beside their name in the Add Co-Planners window.

Important: <u>Do NOT click Submit</u> if you have chosen a co-planner. Clicking Submit will send this evaluation on to the next level of evaluation, without giving the co-planner any access.

6. Contact the co-planner you added to coordinate who will actually submit this evaluation once the co-planner has completed evaluating the employee.

7. Click on **Log Out** in the upper right corner.

Note: Co-Planners perform the same steps as Supervisors, but are able to see the Supervisor's comments, ratings and goals, as well as being able to add their own. Warning: If the Co-Planner clicks the Submit button at any point while completing the evaluation, it will move on to the next person in the approval queue and the Co-planner and Supervisor will no longer be able to access the evaluation.

When both evaluators are finished, one should click the **Submit** button, and click it again when the **Submit Review** screen opens.

Evaluation Approval Queue

HR Review: The entire document is reviewed by HR personnel to make sure all the required fields have been filled in and that the language is appropriate.

2nd Level Supervisor Review: Reviews the evaluation and signs off on it.

VP/DEAN Review: Reviews the evaluation, signs off on it.

Signing Off the Evaluation

After the VP/Dean finishes his/her review, the evaluation is sent back down the queue. You will get an email when the evaluation is ready for you to sign the review and meet with the employee.

1. Login to the TMS system and click on the evaluation you wish to sign off, shown in the **Your Action Items** section. The **Review Step Progression** chart will show that you are at the final step: Supervisor Sign Off. Click on **Get Started**.

2. On each page of the evaluation click **Next**. You cannot make any changes in the evaluation at this point.

3. When **Performance Eval Supervisor Sign Off** screen opens, enter any final comments you may have in the box at the bottom of the page.

4. Type in your first and last name in the **Manager** box and click **Sign**.

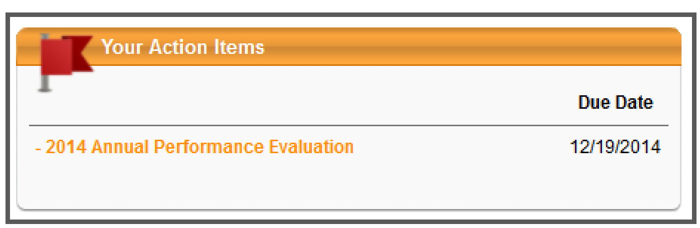
5. To finish this step, click **Submit**.

Once you have submitted the evaluation, it will be removed from your Action Items list and you will need to meet with the employee to present their evaluation results.

Reviewing the Evaluation with the Employee

When you receive the email telling you the evaluation is ready for signature, re-enter the system and electronically sign the document as mentioned above. Schedule a time to meet with the employee. You will need to have a computer for the employee to access and sign off the review.

1. Have the employee sign in to their account the using the **Talent Management System** link in BengalWeb. Employee should click on their **Annual Performance**



Evaluation link under **Your Action Items** on the TMS home page.

2. Click the Get Started button, bottom right, to open the evaluation.

3. Review each page of the evaluation with the employee, clicking **Next** at the bottom of each page to move on.

When you get to the **Performance Eval Employee Acknowledgement** page, instruct the employee to complete the following steps:

Comment: The space provided at the bottom of this section is so the employee can enter any comments he/she might have on the evaluation.

Employee Acknowledgement: The employee must electronically sign the form by typing their first and last name in the **Employee Acknowledgement** box and clicking on the **Sign** button and the evaluation is complete.

My Team

This link at the top of the TMS page provides you with access to your team's evaluations and goals year round, and will provide historical data as well. Use this to track individual employees' progress on goals through the year.