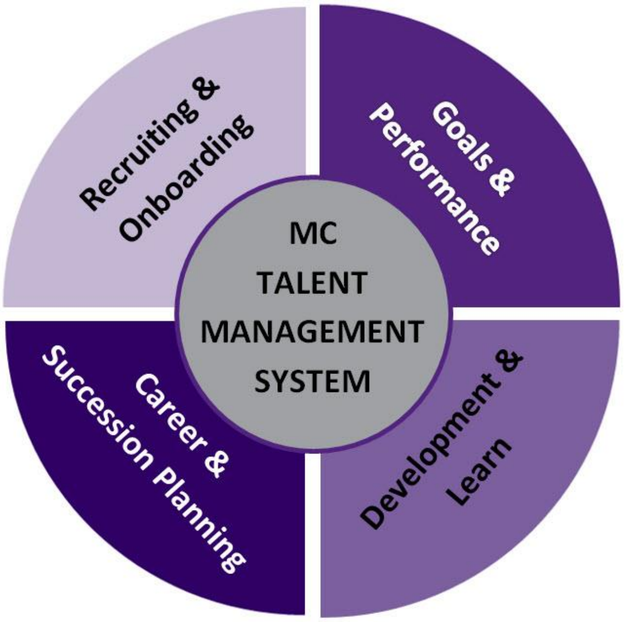
Supervisor's Guide to Writing Evaluations in the Talent Management System (TMS)


Recruiting & Onboarding
Goals & Performance
MC TALENT MANAGEMENT SYSTEM
Career & Succession Planning
Development & Learn

Office of Human Resources and Strategic Talent Management
Performance Management Web Page

Questions? E-mail tms-evaluations@montgomerycollege.edu

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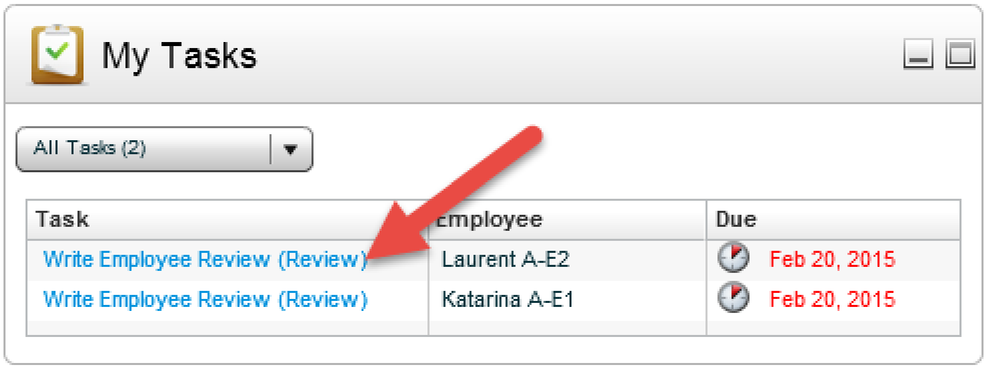
Introduction

This document provides guidance and navigational instructions for the performance evaluation functions in the TMS that are unique to supervisors. You should already be familiar with "Writing a Self-Evaluation in the Talent Management System – A User Guide", which covers the navigation, entering ratings and comments, and printing. This guide will not duplicate the step-by-step processes for entering ratings and comments for the three major sections of the evaluation. These are the same whether you are writing your self-evaluation or the evaluation of a direct report.

For information and guidance about performance management deadlines, competency definitions and rubrics, supervisor responsibilities and the Supervisor Accountability Metric visit the Office of Human Resources and Strategic Talent Management – Performance Management.

Initially Accessing a Direct Report's Evaluation

Your direct reports **Evaluations** are displayed in the **My Tasks** section of the **Performance Management Employee Center** homepage. Click the **Task** title to access the evaluation.



Task	Employee	Due
Write Employee Review (Review)	Laurent A-E2	Feb 20, 2015
Write Employee Review (Review)	Katarina A-E1	Feb 20, 2015

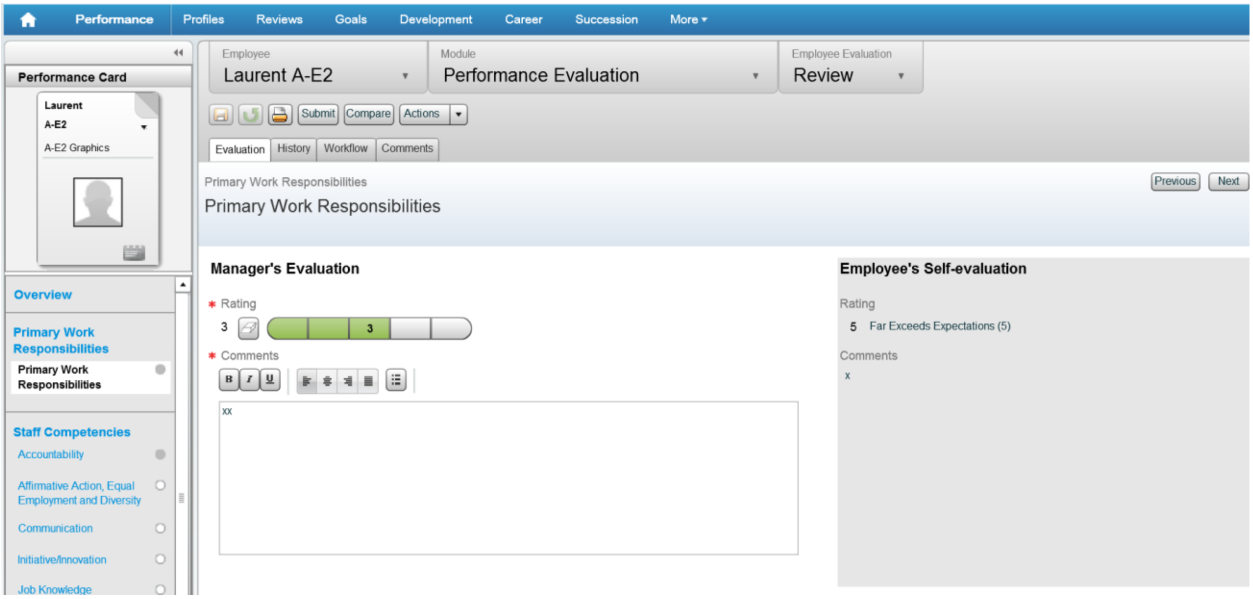
Note: If you do not see a task for someone you believe should be reporting to you or if you see a task for an employee who is not your direct report, please contact tms-evaluations@montgomerycollege.edu).

Writing the Evaluation

Please review the Writing a Self-Evaluation in the Talent Management System – A User Guide, to understand the evaluation workflow, TMS navigation, entering ratings and comments, and printing.

Your direct report may be writing their self-evaluation at the same time you are writing theirs. Your ratings and comments are hidden from the direct report until you submit the evaluation to the system. The comments of the direct report are also hidden from you until the direct report submits the evaluation to you.

If your employee has already submitted a Self-evaluation, their comments are displayed in the gray box on the screen. Enter your comments in the **Comments** box and click **Next** to complete the **Evaluation**.


Performance
Profiles
Reviews
Goals
Development
Career
Succession
More
Performance Card
Laurent
A-E2
A-E2 Graphics
Submit
Compare
Actions
Evaluation
History
Workflow
Comments
Previous
Next
Overview
Primary Work Responsibilities
Primary Work Responsibilities
Staff Competencies
Accountability
Affirmative Action, Equal Employment and Diversity
Communication
Initiative/Innovation
Job Knowledge

Employee: Laurent A-E2

Module: Performance Evaluation

Employee Evaluation: Review

Primary Work Responsibilities

Primary Work Responsibilities

Manager's Evaluation

* Rating: 3

* Comments: xx

Employee's Self-evaluation

Rating: 5 Far Exceeds Expectations (5)

Comments: x

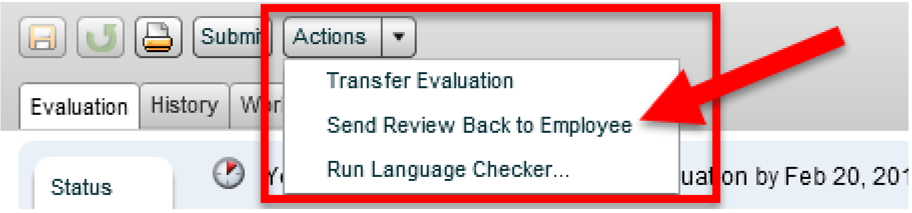
Working with the Evaluation

Sending an Evaluation back to Employee

Sending the Self-Evaluation (Review) Back to the Employee: After the direct report submits the self-evaluation, they can read it, but cannot edit it unless you return it to “Draft” status by sending it back to them.

To send an evaluation back to the employee, do following:

1. Click the **Actions** dropdown arrow and select **Send Review Back to Employee**.



Submitting an Evaluation

When you click **Submit,** the evaluation becomes accessible (read-only) to the direct report. Once submitted, you cannot edit it and your status for that evaluation will change from **Draft** to **Request Acknowledgement**. It is critical that you meet with the direct report to discuss the evaluation before submitting it.

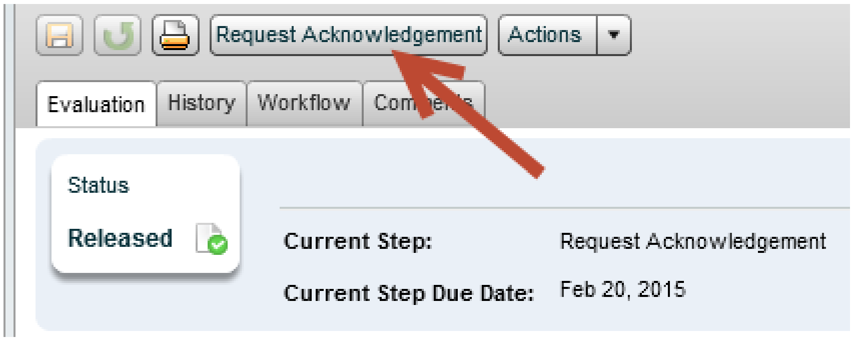
Note: If you must resume make additional edits to an evaluation after submitting it, contact tms-evaluations@montgomerycollege.edu.Both you and your direct report have to repeat the process of resubmitting the evaluation. Your ratings and comments are be retained in their original form.

When submitting the evaluation, you are prompted to enter comments. These comments will appear on the **Comments** tab on the **Evaluation Overview** page for you and the direct report.

Requesting Acknowledgement

After clicking the submit button, the button becomes the Request Acknowledgement button. Click the Request Acknowledgement button to continue the submittal process.

After clicking **Request Acknowledgement** you are prompted to enter the date evaluation meeting took place and enter any comments about it. These comments, together with your submission comments, display on the **Comments** tab. The direct report receives an e-mail notification requesting acknowledgement of the evaluation.



Status

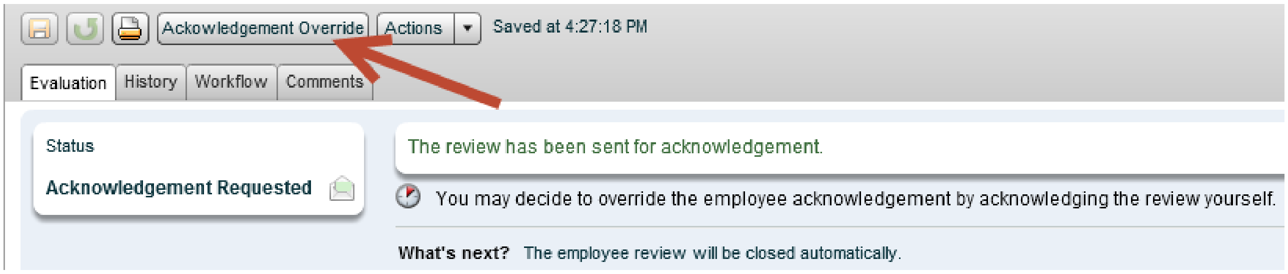
Released

Current Step: Request Acknowledgement

Current Step Due Date: Feb 20, 2015

Acknowledging and Closing

Under normal circumstances, the direct report acknowledges the evaluation and that triggers the formal closing of the evaluation in the system. If the direct report is unable to acknowledge the evaluation, you are can perform this action on their behalf, using the **Acknowledgement Override**. After clicking the button you are be prompted to explain why you took this action. The Acknowledgement Override explanation will become part of the permanent record. It can be found in the **Comment** tab.



Saved at 4:27:18 PM

Status

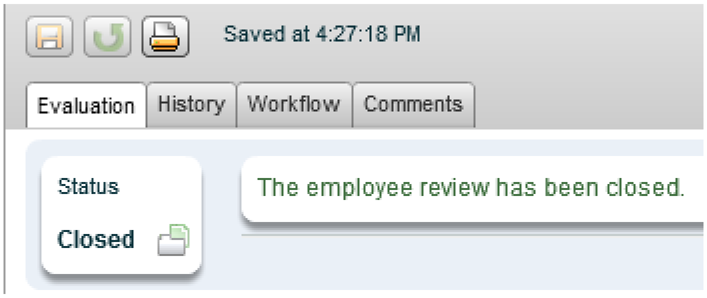
Acknowledgement Requested

The review has been sent for acknowledgement.

You may decide to override the employee acknowledgement by acknowledging the review yourself.

What's next? The employee review will be closed automatically.

After the evaluation is acknowledged the evaluation status is changed to **Closed**.



Saved at 4:27:18 PM

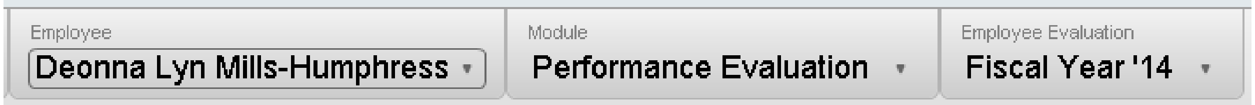
Status

Closed

The employee review has been closed.

Revisiting an Employee's Evaluation

- **Employee drop-down menu**: From the Employee Center, click **Reviews**.



Employee: Deonna Lyn Mills-Humphress

Module: Performance Evaluation

Employee Evaluation: Fiscal Year '14

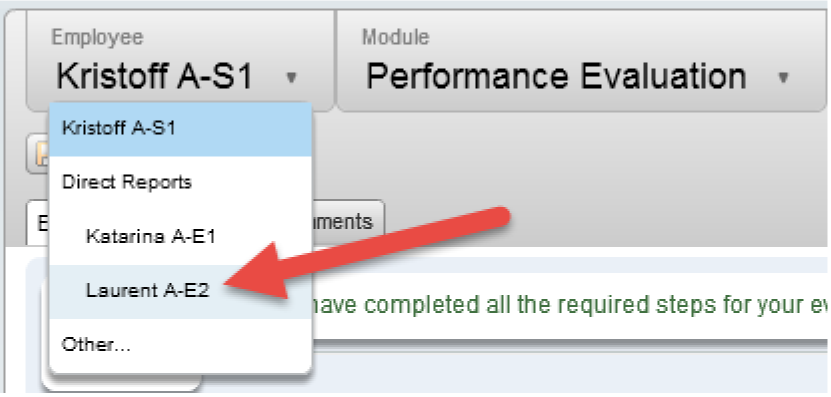
- The Performance Evaluation module displays. The system default is to display your own self-evaluation for the current fiscal year. The Employee drop-down menu will display your name.
- Select the drop-down menu and choose a name of a direct report from the list. **The evaluation for that report will open** and you will find yourself in the Performance Evaluation Module User Interface.

  Note: The **Module** drop-down menu enables you to open any of the modules available in the Talent Management System including: Performance Evaluation, Talent Profile, Goal Plan modules and Feedback.   You will need to use this when evaluating the goals of your direct reports. The **Employee Evaluation** drop-down menu allows you to open current and past Performance Evaluations.

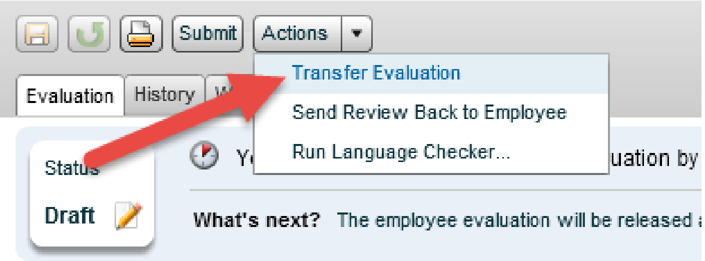
Appendix -Transferring an Evaluation to Another Supervisor

Before attempting to transfer an evaluation to another supervisor please read the Performance Management FAQs: Transferring Performance Evaluations document.

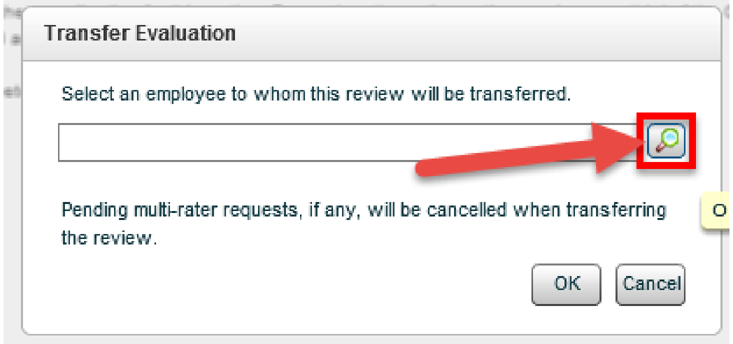
a) From the **Employee** dropdown menu select the direct report for whom you want to transfer the evaluation.


Employee
Kristoff A-S1
Module
Performance Evaluation
Kristoff A-S1
Direct Reports
Katarina A-E1
Laurent A-E2
Other...
nments
have completed all the required steps for your ev

b) When the evaluation opens, click the **Actions** dropdown menu and select **Transfer Evaluation.**


Submit
Actions
Transfer Evaluation
Send Review Back to Employee
Run Language Checker...
Evaluation
History
Status
Draft
uation by
What's next? The employee evaluation will be released

c) The **Transfer Evaluation** dialog box is displayed. Click the **Open the Selector** icon.

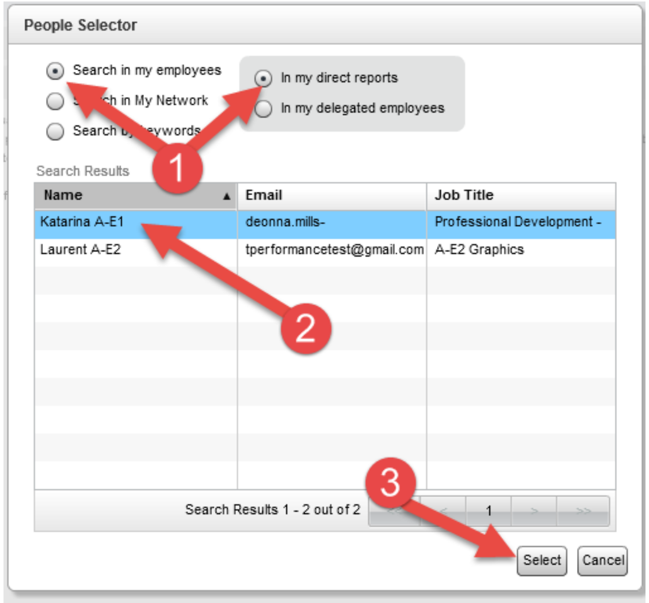

Transfer Evaluation
OK
Cancel

Select an employee to whom this review will be transferred.

Pending multi-rater requests, if any, will be cancelled when transferring the review.

d) If the supervisor to whom you want to transfer the evaluation is one of your direct reports:

- Leave the radio buttons selected for Search in my employees and in my direct reports.
- In the Search Results select the name of the supervisor.
- Click **Select.**



● Search in my employees
○ Search in My Network
○ Search by keywords

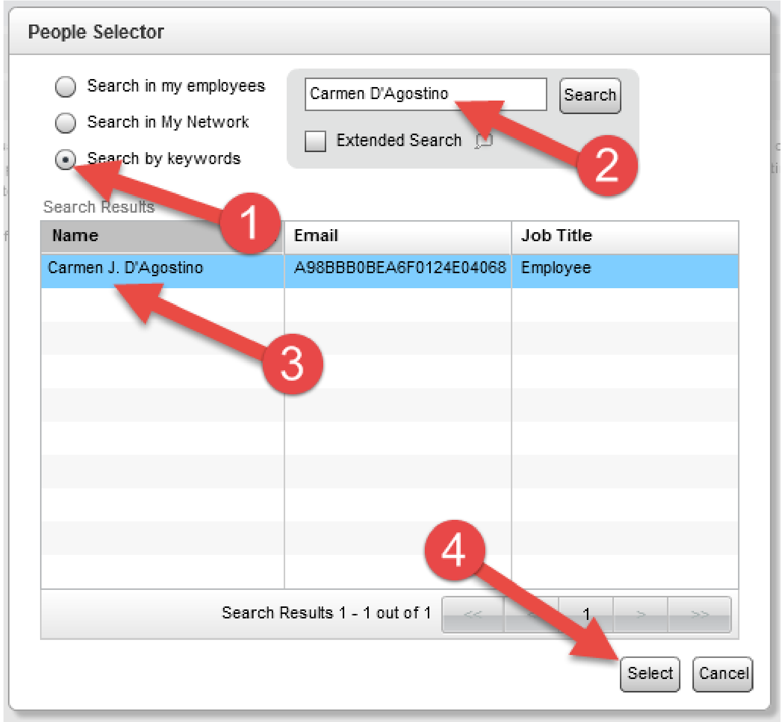
● In my direct reports
○ In my delegated employees

Name	Email	Job Title
Katarina A-E1	deonna.mills-	Professional Development -
Laurent A-E2	tperformancetest@gmail.com	A-E2 Graphics

Search Results 1 - 2 out of 2

e) If the supervisor to whom you want to transfer the evaluation is not a direct report:

- Select the radio button labeled **Search by keyword.**
- In the search field enter the name of the supervisor and click **Search**.
- When the Search Results populate the People Selector, click the **name of the supervisor** to who you want to make the transfer.
- Click **Select**



○ Search in my employees
○ Search in My Network
● Search by keywords

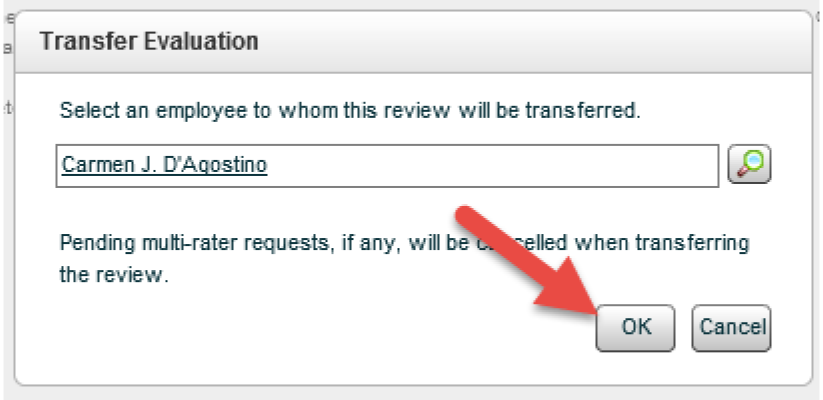
Carmen D'Agostino

☐ Extended Search

Name	Email	Job Title
Carmen J. D'Agostino	A98BBB0BEA6F0124E04068	Employee

Search Results 1 - 1 out of 1

f) The **Transfer Evaluation** dialog box will reopen. Click **OK** to execute the transfer.
Note: After clicking **OK**, only the other supervisor or the TMS System Administrator will be able to transfer the evaluation back to you. If you need immediate help with this email tms-evaluations@montgomerycollege.edu



Transfer Evaluation

Select an employee to whom this review will be transferred.

Carmen J. D'Agostino

Pending multi-rater requests, if any, will be cancelled when transferring the review.