

ReviewSnap Procedures for Managers at Dickinson College

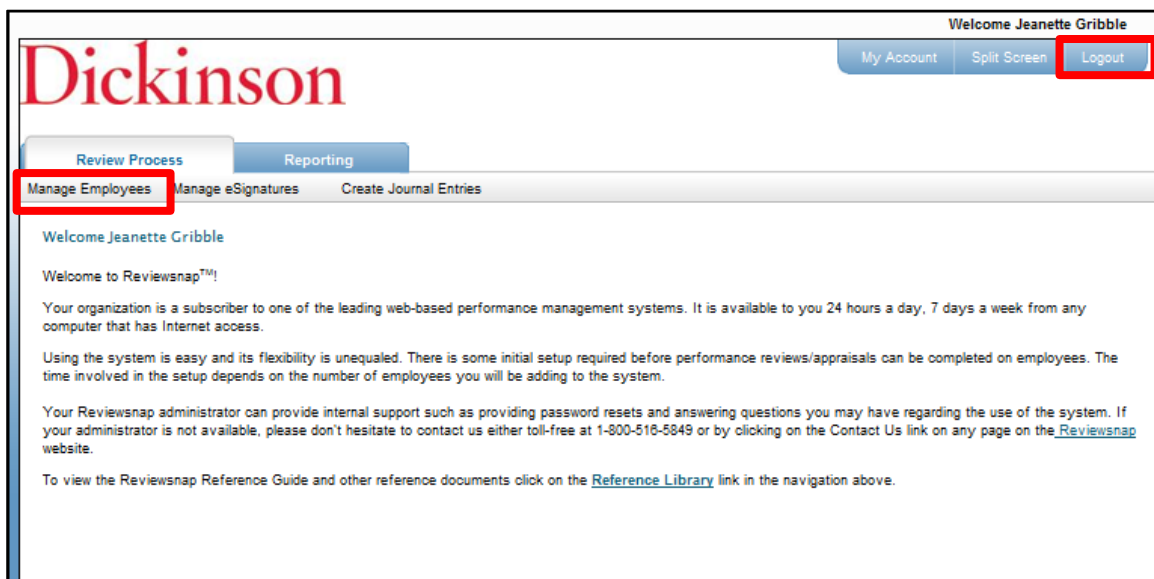
90 Days Review for a Support Staff Employee

ReviewSnap is a web based performance management system program found in the [Gateway](#). Look for the **Reviews** icon found under the **Application Launch Pad**, to get into ReviewSnap.

- [Create or Complete a Review](#) - Starting an employee's review.
- Schedule the one-on-one meeting with the employee.
- [Finalize & Add Signatures to a Review](#) - Requires Signature to complete the Review.
- [Journal Entries](#) - Area in ReviewSnap to add details during the year.
- [Logout](#) - Logout of ReviewSnap

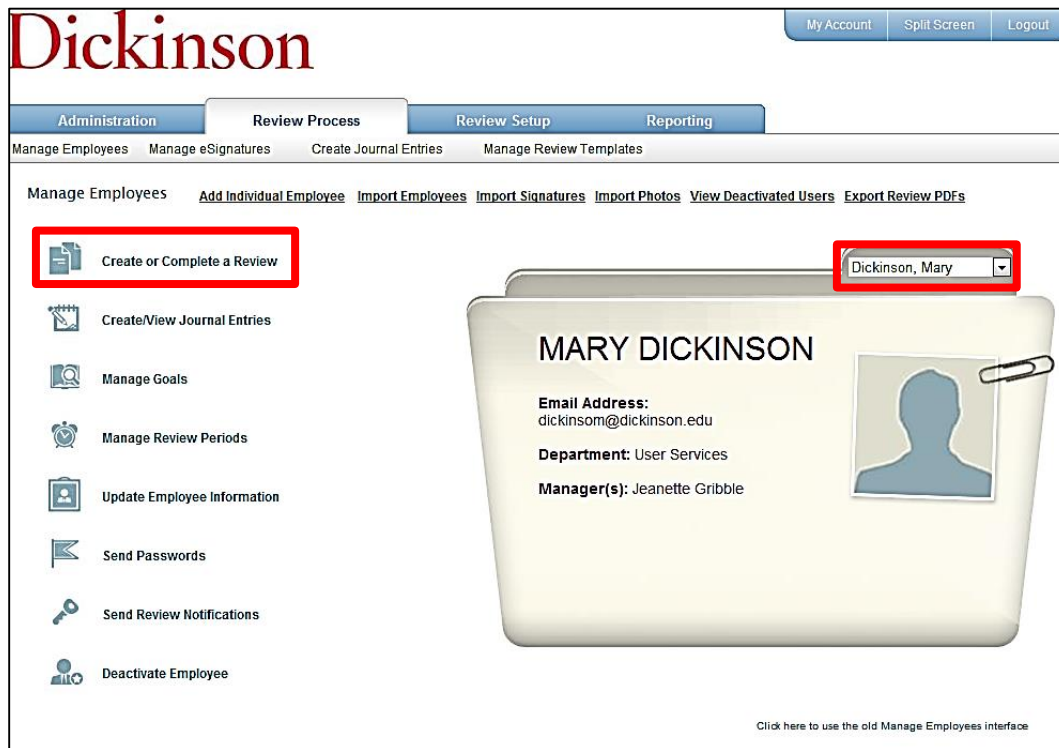
Create or Complete a Review

Once logged into ReviewSnap you will be on the landing page. Notice the **Logout** found on top right corner, below your name.



In order to start an employee's six month Administrative Exempt review on the **Review Process** tab, click on the **Manage Employees** link.

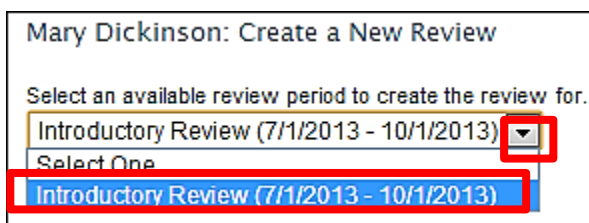
In the **Manage Employees** area, select the user that you want to review by clicking on the drop down arrow found on the folder. The names of all employees that report to you should appear on this list. Select the employee you want then click on **Create or Complete a Review**. For this review the manager starts it first, not the employee.



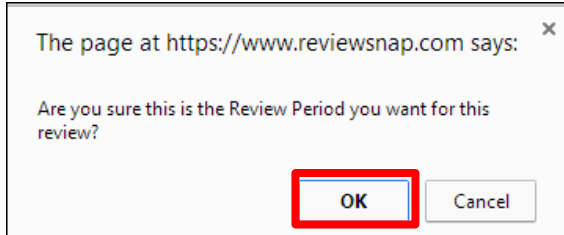
You are now starting the **Review** evaluation process in ReviewSnap.

Select an available review period to create the review for.

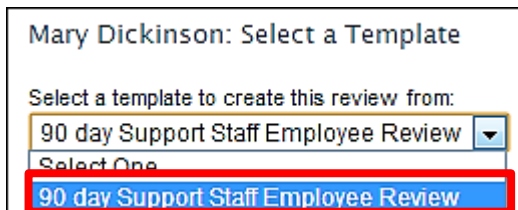
Click the drop down arrow to select the **Introductory Review**.



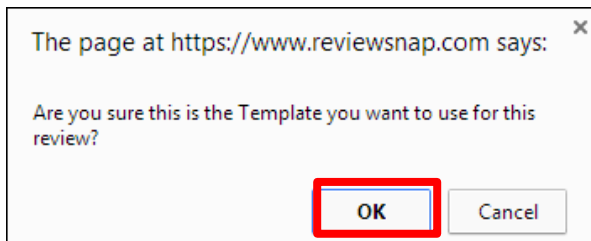
At the **Are you sure** dialog box message appears, click **OK** to continue.



Select the **Admin Introductory 90 Day Support Staff Employee Review** in the drop down arrow.



Click **OK** to continue.



Verify the details are correct and click the **Continue** button.

A screenshot of a web application interface. At the top, there are two tabs: "Review Process" (active) and "Reporting". Below the tabs are three links: "Manage Employees", "Manage eSignatures", and "Create Journal Entries". The main content area is titled "Review Your Selections" and contains a warning message: "Review the information you have selected. Once you proceed past this step, you will not be able to change template for this review period." Below this, the following details are listed: "Employee: Dickinson, John (jdickinson@dickinson.edu)", "Review Period: 9/1/2013 - 3/1/2014", and "Template Name: Admin. Introductory 6 month Evaluation". At the bottom, there are three buttons: "Continue", "Cancel", and "Print Blank Evaluation Form". The "Continue" button is highlighted with a red rectangular box.

Each Review template is different depending on the campus division. The example below is for the Exempt 6 month review.

Instructions & Quality of Work section.

Mary Dickinson: Review of Performance

Instructions

If you recall we indicated in the appointment letter that continued employment would be subject to completion of the 90 day (three month) orientation period. This is a general review which evaluates job knowledge and identifies strengths and areas of concern. Please note the general guidelines listed below and complete the attached evaluation.

General guidelines for completing the evaluation:

Prior to the review

- We suggest you pre-access the employee's performance on/or about day 45, if at this point there are concerns about performance contact Human Resource Services IMMEDIATELY.
- In addition, if your overall evaluation of the 90 day period is a "FAIR" or "UNSATISFACTORY" rating or if you are not recommending retention of this employee, please discuss with HR Services before you discuss with the employee.

The review

- Set up a time to discuss this review with the employee.
- If retention is recommended this may also be a good time to discuss future goals.

After the review

- Following your evaluation meeting please have the employee electronically sign the review.
- If you have any questions, please call HR Services.

QUALITY OF WORK

Scale Legend

FAIR (F): Often unacceptable. Frequent errors or rejections
GOOD (G): Acceptable, usually neat, few errors
VERY GOOD (VG): Seldom necessary to check work
EXCEPTIONAL (EX): Exceptionally accurate

Competency Description	F	G	VG	EX
PROGRESS AS TO THOROUGHNESS, ACCURACY AND NEATNESS.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

✓ = All Competencies & Comments have been filled-out.

Select the Scale result by clicking the circle and click the **Next** button. Notice the **Save Only** and **Save and Exit**.

Quality of Work section opens up for you to make a selection.

Mary Dickinson: Review of Performance

QUALITY OF WORK

Scale Legend

FAIR (F): Often unacceptable. Frequent errors or rejections
GOOD (G): Acceptable, usually neat, few errors
VERY GOOD (VG): Seldom necessary to check work
EXCEPTIONAL (EX): Exceptionally accurate

Competency Description	F	G	VG	EX
PROGRESS AS TO SPEED, DILIGENCE, AND CONSISTENCY OF OUTPUT.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

✓ = All Competencies & Comments have been filled-out.

Click **Next**. Notice the **Previous** button along with the **Save Only** or to **Save and Exit** buttons are available.

The **Knowledge of Work** section is next.

Mary Dickinson: Review of Performance

KNOWLEDGE OF WORK

Scale Legend

FAIR (F): Often unacceptable. Frequent errors or rejections
 GOOD (G): Acceptable, usually neat, few errors
 VERY GOOD (VG): Seldom necessary to check work
 EXCEPTIONAL (EX): Exceptionally accurate

Competency Description	F	G	VG	EX
SPEED WITH WHICH EMPLOYEE MASTERS NEW ROUTINE, GRASPS EXPLANATIONS AND RETAINS THIS KNOWLEDGE.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

✓ = All Competencies & Comments have been filled-out.

The **Dependability** section is next.

Mary Dickinson: Review of Performance

DEPENDABILITY

Scale Legend

FAIR (F): Often unacceptable. Frequent errors or rejections
 GOOD (G): Acceptable, usually neat, few errors
 VERY GOOD (VG): Seldom necessary to check work
 EXCEPTIONAL (EX): Exceptionally accurate

Competency Description	F	G	VG	EX
CONSCIENTIOUSNESS, RELIABILITY, PUNCTUALITY, ATTENDANCE AND SUPERVISION REQUIRED.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

✓ = All Competencies & Comments have been filled-out.

The **Cooperation/Attitude** section is next.

Mary Dickinson: Review of Performance

COOPERATION/ ATTITUDE

Scale Legend

FAIR (F): Often unacceptable. Frequent errors or rejections
 GOOD (G): Acceptable, usually neat, few errors
 VERY GOOD (VG): Seldom necessary to check work
 EXCEPTIONAL (EX): Exceptionally accurate

Competency Description	F	G	VG	EX
ABILITY TO WORK HARMONIOUSLY AND EFFECTIVELY WITH OTHER EMPLOYEES AND SUPERVISORS. INTEREST, SATISFACTION AND ENTHUSIASM TOWARD JOB AND THE COLLEGE.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

✓ = All Competencies & Comments have been filled-out.

You are now in the **Employee** area to fill in details for each sections dialog box.

Mary Dickinson: Review of Performance

EMPLOYEE

WHAT ARE EMPLOYEE'S STRONG POINTS?

WHAT AREA(S) OF THE EMPLOYEE'S PERFORMANCE NEED IMPROVEMENT?

✓ = All Competencies & Comments have been filled-out.

Previous Next Save Only Save and Exit

Click **Next**. Notice the **Previous** button along with the **Save Only** or to **Save and Exit** buttons are available.

Spell Check and AuthoriCheck dialog boxes flash and appear for each section. Correct any errors it finds and click **OK**.

Mary Dickinson: Review of Performance

COMMENTS

Comments are encouraged on all elements of performance, but are required on only those elements rated FAIR or UNSATISFACTORY.

Previous Next Save Only Save and Exit

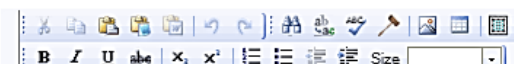
Click **Next**. Notice the **Previous** button along with the **Save Only** or to **Save and Exit** buttons are available.










Spell Check and AuthoriCheck dialog boxes flash and appear for each section. Correct any errors it finds and click **OK**.

Overall Evaluation section is next.

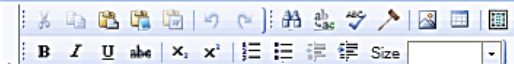
Mary Dickinson: Review of Performance










OVERALL EVALUATION



B *I* U **abc** **x₁** **x²**          Size

EXCELLENT ☐ Excellent in all elements
VERY GOOD ☐ No fair elements and majority of items rated very good or better
GOOD ☐ Most elements rated good or one element rated fair
FAIR ☐ No unsatisfactory elements, 2 or more elements rated fair
UNSATISFACTORY ☐ One or more elements rated unsatisfactory



B *I* U **abc** **x₁** **x²**          Size

✓ = All Competencies & Comments have been filled-out

As the Supervisor, Do you Recommend the Retention of this Employee?? section is next.

Mary Dickinson: Review of Performance

AS THE SUPERVISOR, DO YOU RECOMMEND THE RETENTION OF THIS EMPLOYEE?

YES _____ NO* _____ OTHER* _____ If NO or OTHER, please explain:

Yes or No or Other details

✓ = All Competencies & Comments have been filled-out.

Previous Next Save Only Save and Exit

Click **Next** to continue.

You are now in the **Overall Comments** section.

Mary Dickinson: Overall Comments

Overall Comments:

Previous Next Save Only Save and Exit

Click the **Save Only** button to save your review at any time during the review process. Click the **Save and Exit** button will save your review for later and exit the program. The **Next** button will take you to the next section or **Previous** button to go back.

Click **Next**. You have now arrived at the **Finalize Review** area as shown below.

The screenshot shows a web interface with two tabs: 'Review Process' and 'Reporting'. Under 'Review Process', there are links for 'Manage Employees', 'Manage eSignatures', and 'Create Journal Entries'. Below these, it says 'John Dickinson: Finalize Review' with a dropdown arrow. There are three links: 'Click here to mark this review ready for Signatures.', 'Click here to send a notification about this review.', and 'Click here to save this review and exit.'

At this point, you need to schedule a meeting to review the employee's performance review with them.

If you go back to the **Manage Employees**, select the employee and **Create or Complete a Review**, select **View**; you will be able to print and/or view or **Save As** a pdf the Review evaluation you just completed.

The screenshot shows a web interface with two tabs: 'Review Process' and 'Reporting'. Under 'Review Process', there are links for 'Manage Employees', 'Manage eSignatures', and 'Create Journal Entries'. Below these, it says 'John Dickinson: Complete an Existing Review'. There is a table with the following data:

Review Period	Start Date	End Date	Reviewer	Actions
Introductory Review	9/1/2013	3/1/2014	Gribble, Jeanette	View Reviewers Continue

If you want to send a copy of the review by going into the **View** link, doing a **File Save As**, this is a pdf, and can be sent to them as an attachment by email. You can also print the review to go over during the one-on-one meeting or look at it on a computer together.

Note: If you click Continue, it will give the ability to **Finalize** the review. See more details below.

Finalize the Review Add Signatures to Review

Once you have had your meeting with the employee you now need to Finalize the review. To Finalize the review, click on the **Manage Employees** link. In the **Manage Employees** area, select the user that you want to Finalize by clicking on the drop down arrow found on the folder. Select the employee you want then click on **Create or Complete a Review**. Leave the drop down list on **Finalize Review**, and then click on the link to **Click here to mark this review ready for Signatures**. Click on **OK** at the **Message from webpage** dialog box to continue. Once **Finalized** the review cannot be changed.

Dickinson My Account Split Screen Logout

Administration **Review Process** Review Setup Reporting

Manage Employees Manage eSignatures Create Journal Entries Manage Review Templates

Mary Dickinson: Finalize Review

[Click here](#) to mark this review ready for Signatures.

[Click here](#) to send a notification about this review.

[Click here](#) to save this review and exit.

Message from webpage

Are you sure you want to put this review in sign-off status?

OK Cancel

If your division does require a signature as part of the review process put a check in **Require Employee Signature**. Check off all the users (the employee and all managers) that need to sign off and click the **Submit** button. By clicking **Submit**, an automatic email message from ReviewSnap will be sent to stating the performance review is ready for their signature.

Review Process Reporting

Manage Employees Manage eSignatures Create Journal Entries

If the employee needs to sign-off on this review, please check the box below.

☒ Require Employee Signature

If other managers need to sign-off on this review, please select them below and submit. You will then be able to put the managers in the appropriate sign-off order. Otherwise, do not select any other managers and click Submit to mark this review ready for signatures.

☒ Mollett, Terry

☒ Renaud, Robert

Submit

Now you will need to set the order of signatures for the review.

Drag the Manager names to select the appropriate sign-off order page details appear. To drag a person's name listed below, hold the mouse till you see a 4 headed arrow and move (drag) it up or down. The order will be the employee first then any managers. Each person will receive an email when their turn comes up to add a Signature. Depending on how many managers your department has this list could be several managers. Click the **Continue** button.

Review Process Reporting

Manage Employees Manage eSignatures Create Journal Entries

Drag the Manager names to select the appropriate sign-off order.

Manager
Andrew Connell
Terry Mollett
Robert Renaud

Continue

At any time you can check in ReviewSnap under **Manage eSignatures** for the status of who did or did not sign.

The **eSignature for Review** example below shows that the employee has not signed the review.

Dickinson

My Account Split Screen Logout

Administration Review Process Review Setup Reporting

Manage Employees Manage eSignatures Create Journal Entries Manage Review Templates

eSignature for Review

Review Period: 2/11/2013 - 3/8/2013

Type	Name	Signature	Date
Employee	Mary Dickinson	not signed	

The example below shows both the employee and their manager have signed off on the review and it is now ready for HR.

eSignature for Review

Review Period: 3/1/2012 - 2/28/2013

Type	Name	Signature	Date
Employee	Jeanette Gribble	Jeanette Gribble	1/8/2013
Manager	Terry Mollett	Terry Mollett	1/8/2013

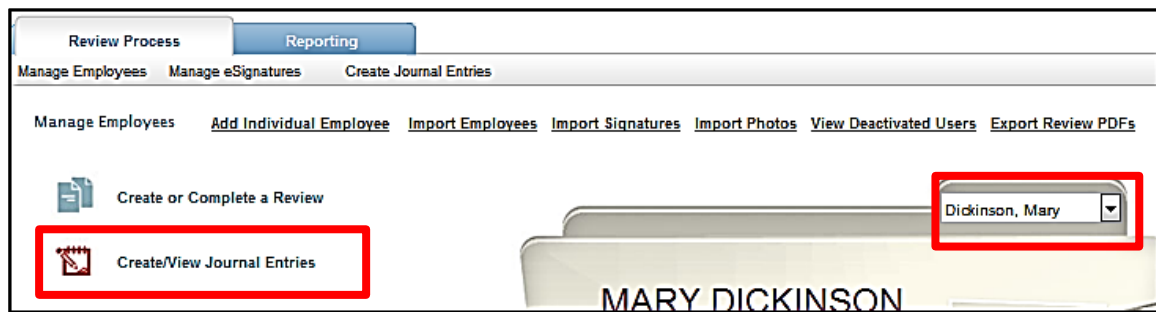
Click the **Logout** (top right corner) when completed with ReveiwSnap.

Journal Entries

This is an optional area within this system; you may choose to utilize this function to assist with creating the following year's performance review. If you choose to utilize this option, anything you type within this area is able to be viewed by the employee or updated.

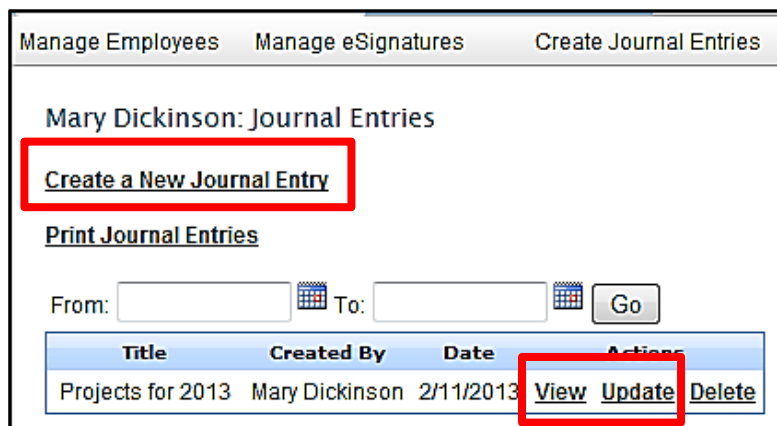
To create or update a **Journal Entry** click the **Review Process** tab, then click on the **Manage Employees** link. Depending on your division you may not use this area of ReviewSnap.

In the **Manage Employees** area, select the user that you want to review by clicking on the drop down arrow found on the folder. The names of all employees that report to you should appear on this list. Select the employee you want then click on **Create/View Journal Entries**.



Create a New Journal Entry or **Update a Journal Entry** is available in the Journal Entries area.

NOTE: An employee can create a Journal Entry and mark as private which cannot be seen by a manager.



Logout

Click the **Logout** (top right corner) when completed with ReveiwSnap.

