

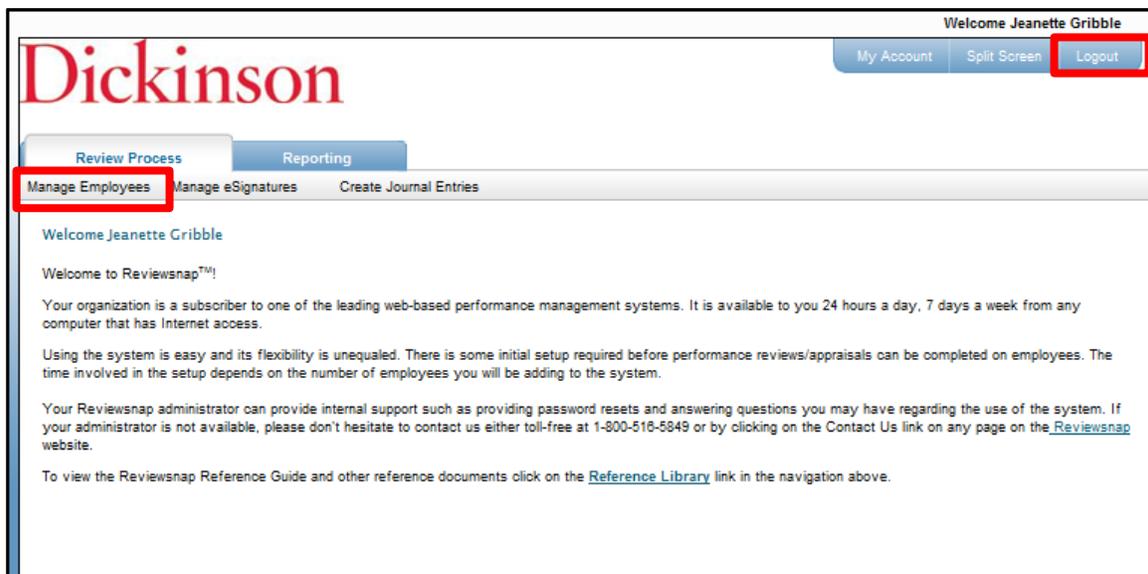
ReviewSnap Procedures for Managers at Dickinson College – Children’s Center

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](#) - To find, read and update 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

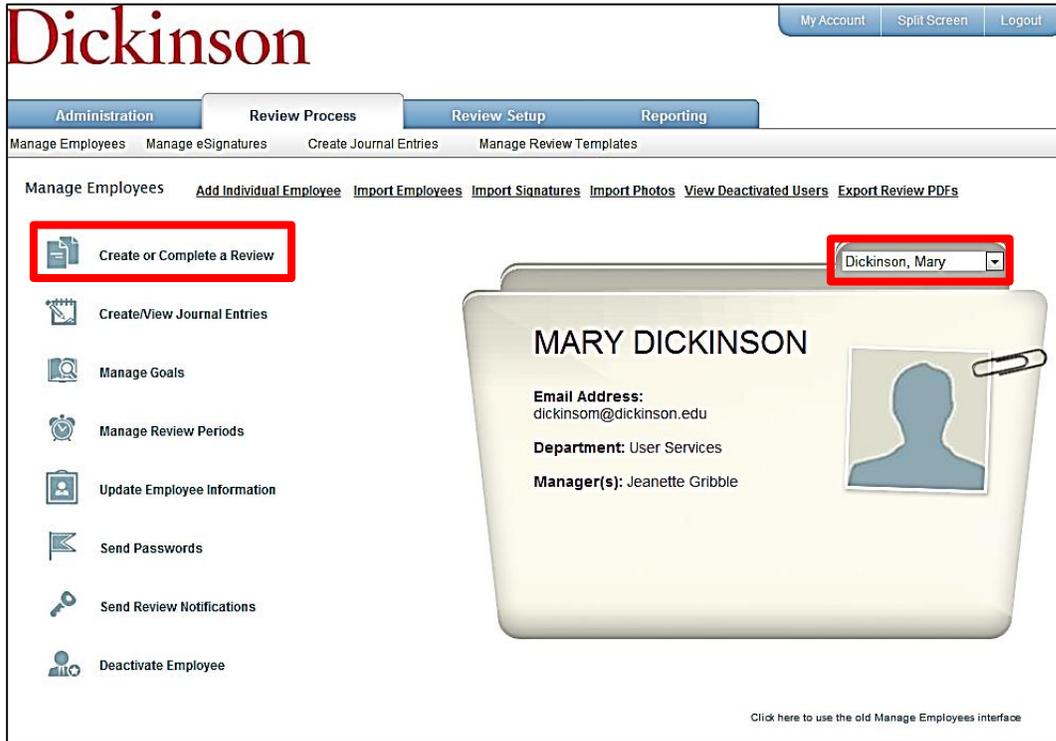
Create or Complete a Review

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 complete an employee’s 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**.



You are now starting the **Complete an Existing Review** evaluation process after the employee has filled out their details about their Review in ReveiSnap.

Click the **View** link to open the review and read details the employee has added.

Click the **Continue** link to look at the review, see the details the employee has added and add your details to the review. This is done after an employee has Finalized their review.



Each Review template is different depending on the campus division. The example below is for the **Children's Center** division.

Clicking **Continue** (shown above) brings up the **General Work Habits** section.

The Review process is opened as shown below for an employee that has filled out their review details. To see what the employee has chosen or added, click on the little plus sign to open up and see all the choices. Notice the employees name found to the left of the selection. You, as a manager will click above the employee's question to complete it.

John Dickinson: General Work Habits

Instructions

To determine ratings, only use critical incidents that took place during this appraisal period.

The section for goal setting is provided to promote discussion during the appraisal interview. Supervisors can identify goals for the next appraisal period, indicate training needs, or specify corrective action when appropriate. Once an employee and supervisor have set goals on a previous performance management form, supervisors will request the employee to conduct a self-assessment of progress towards these goals prior to the next performance appraisal interview.

Have the employee sign the appraisal when the performance discussion is completed. The signature indicates all the information on the form has been discussed with the supervisor.

General Work Habits

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
+ Arrives on Time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Reliable in attendance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Responsible job duties	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Alert in health and safety matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Flexible with assignments and schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Gives ample notice of absence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+ Remains calm in tense situations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

+ Comments/Suggestions: Comment Suggestions

Next **Save Only** **Save and Exit**

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

You, as a manager will click above the employee's question to complete it. Then employees name appear beside their selection to each description.

Competency Description	Fre	Occ	Nev
- Arrives on Time	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Reliable in attendance	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Responsible job duties	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

The **Comments/Suggestions** area is opened up to include any details the employee has added below where the manager would type their details

- Comments/Suggestions:

Yes, John does have a great attitude at all times!

Comments from Other Reviewers:

Name: John Dickinson
Comment: Great attitude!

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 as you move forward into each section of the Review.

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

Click the **Next** button to go to the next section which is **Interactions with Children** as shown below, with the plus sign clicked on to open up the employee selection & details.

Interaction with Children

Friendly, warm and affectionate

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Eye to eye interaction	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Uses modulated, appropriate voice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Shows respect for individuals	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Is aware of developmental levels	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Encourages independence and self-help	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Avoids stereotyping and labeling	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Reinforces positive behavior	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Uses positive discipline techniques	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Regularly record observations of children	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

+ Comments/Suggestions: Comment Suggestions

Interaction with children is wonderfu,

Previous **Next** **Save Only** **Save and Exit**

Click the **Next** button to go to **Classroom Management** section. Notice I opened each question by clicking on the plus sign and I gave this employee a higher rating that she gave himself.

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.

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

John Dickinson: Classroom Management

Classroom Management

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Creates an inviting learning environment	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Maintains a safe environment	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Provides age appropriate activities	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Develops goals from observations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
- Facilitates growth in all areas of development	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Serves as an appropriate role model	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Anticipates problems and redirects behavior	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Is flexible, responsive to children's needs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
- Is prepared for the day's activities	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Handles transitions well	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

+ Comments/Suggestions:

Comment Suggestions

John is so good at this I would like him to train other staff on his procedure.

Previous Next Save Only Save and Exit

Click the **Next** button to go to **Working with parents** section.

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.

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

John Dickinson: Working with parents

Working with parents

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Available and approachable with parents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Listens and responds well to parents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Is tactful with negative information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Shows respect for those from diverse backgrounds	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Maintains confidentiality	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Seeks a partnership with parents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Regularly shares information about the child's progress	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Involves parents in center activities and events	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Comments/Suggestions: Comment Suggestions

Yes, John does have a great attitude at all times!

Comments from Other Reviewers:

Name: John Dickinson
Comment: Great attitude!

Previous Next Save Only Save and Exit

Click the **Next** button to go to **Working with Co-workers** section.
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.

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

John Dickinson: Working with Co-workers

Working with Co-workers

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Is friendly and respectful	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Strives to assume a fair share of work	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Shares ideas and materials	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Communicates directly, avoids gossip	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Approaches criticism with learning attitudes	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Looks for ways to be helpful	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Solves conflict independently	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

- Comments/Suggestions:

Comment Suggestions

As John suggested below he needs some training.

Comments from Other Reviewers:

Name: John Dickinson
Comment: Needs to get some training on this area

✓ = All Competencies & Comments have been filled out

Previous Next Save Only Save and Exit

Click the **Next** button to go to **Professionalism and Growth** section.
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.

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

John Dickinson: Professionalism and Growth

Professionalism and Growth

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Takes job seriously, seeks skill improvement	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Participates in workshops, classes	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Sets goals for personal growth	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Behaves in an ethical manners	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

- Comments/Suggestions: Comment Suggestions

B I U abc x_s x_l |

We need to find some growth details for John.

Comments from Other Reviewers:

Name: John Dickinson
Comment: Details for Growth

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

Previous Next Save Only Save and Exit

Click the **Next** button to get to the final section called **Professional Development Record**.

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.

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

John Dickinson: Professional Development Record

Professional Development Record

Scale Legend

Frequently (Fre):
Occasionally (Occ):
Never (Nev):

Competency Description	Fre	Occ	Nev
- Updates PDR	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Goals are completed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
- Training completed independently	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
John Dickinson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

- PDR Check/Date: _____
of training hours: _____

Answers from Other Reviewers:

Name: John Dickinson
Answer:
Details

- Comments/Suggestions: Comment Suggestions

Previous Next Save Only Save and Exit

NOTE: The PDR Check Date & # of training hours do not need filled in.

Once all sections are completed click the **Next** button found at the bottom.

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

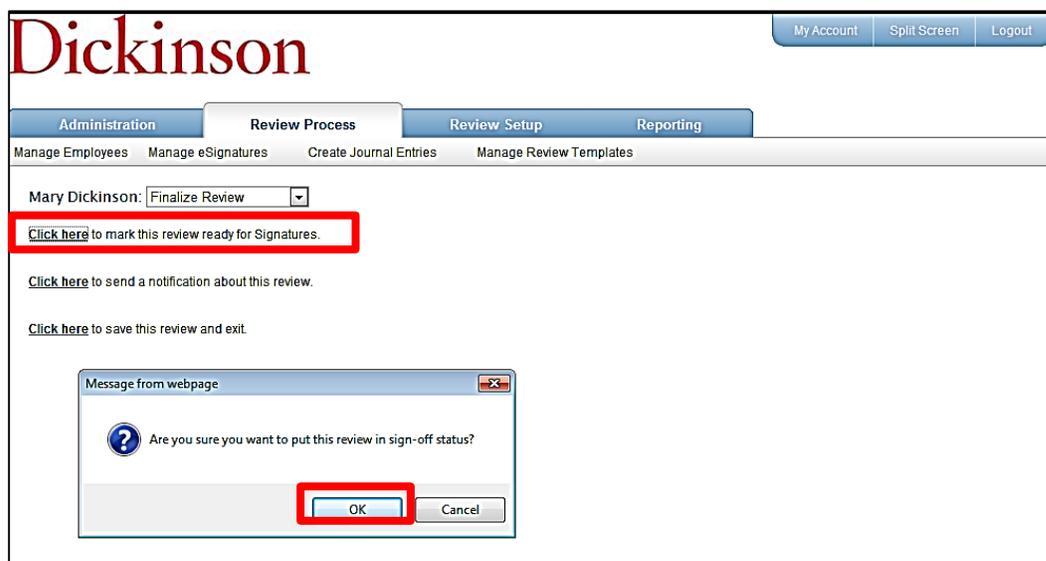
At the **Complete an Existing Review page** you can edit the review by clicking on the **Continue** link, **View** the review as a pdf to either save or print it.

At this point, you need to schedule a meeting to review the employee's performance review with them. 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. If you go back to the **Manage Employees** tab on the left, 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.

Note: The link to **Finalize** the review is also found here. Select this only when you have finished the review and are ready to send to the employee for review and signature. Once **Finalized** the review cannot be changed.

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, go into the **Review Process** tab, 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 a mark this review ready for Signatures**. Click on **OK** at the **Message from webpage** dialog box to continue.



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 the employee has signed and now their manager is add a signature in the review and by clicking on **Sign** it is now ready for HR. Every step of the way emails are generated by ReviewSnap to each person to add their signature.

eSignature for Review

Review Period: 3/13/2012 - 3/13/2013

Type	Name	Signature	Date
HR	Arlene Bones	not signed	
Employee	John Dickinson	John Dickinson	3/14/2013
Manager	Jeanette Gribble	Jeanette Gribble <input type="text"/> <input type="button" value="Sign"/>	3/14/2013
HR	Tammy Henneman	not signed	

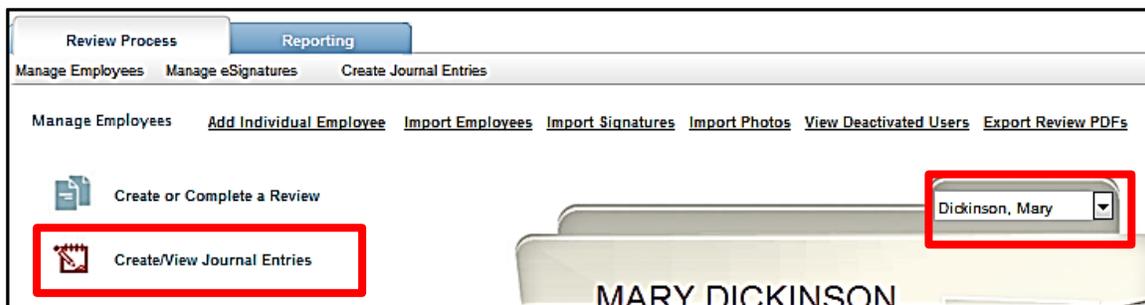
Click the **Logout** (top right corner) when completed with ReveiwSnap.

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.

Manage Employees Manage eSignatures Create Journal Entries

Mary Dickinson: Journal Entries

[Create a New Journal Entry](#)

[Print Journal Entries](#)

From:  To: 

Title	Created By	Date	Actions
Projects for 2013	Mary Dickinson	2/11/2013	View Update Delete

Logout

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

