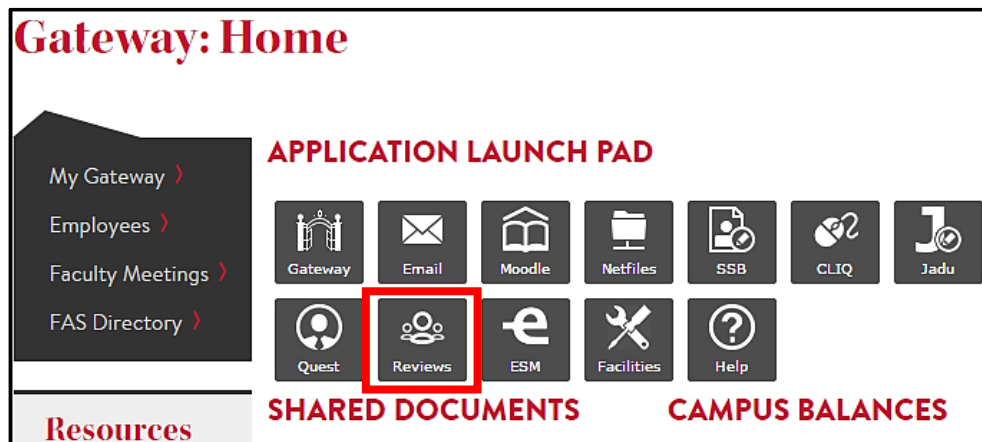


## Review Snap Performance Review - Support Staff - Self Review

Log into the Gateway, then find the **Reviews** icon under the **Applications Launch Pad** for Review Snap.



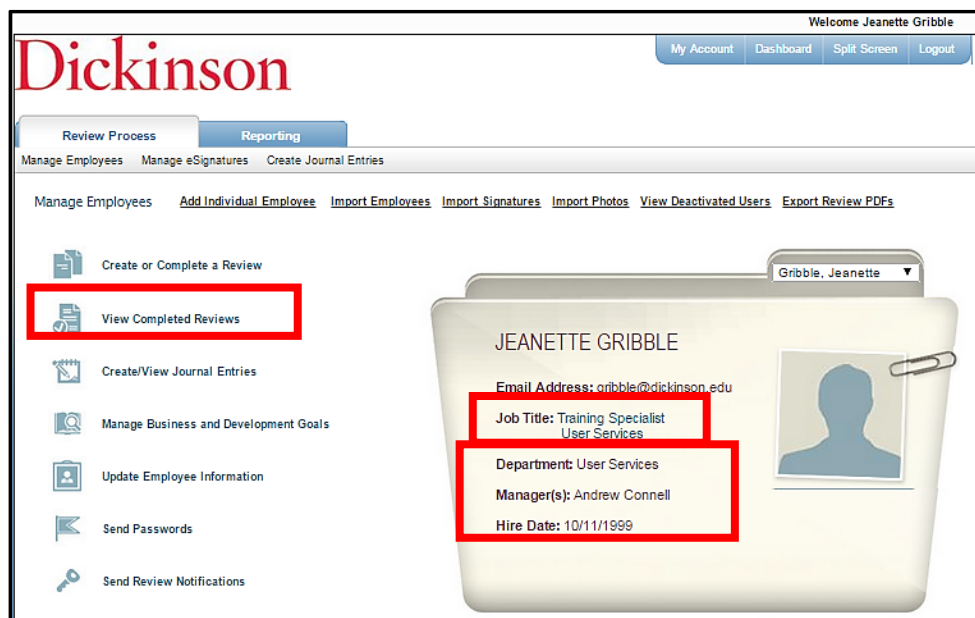
Click to review your **Job Title** for your current job description.

A pdf will open in a new browser tab.

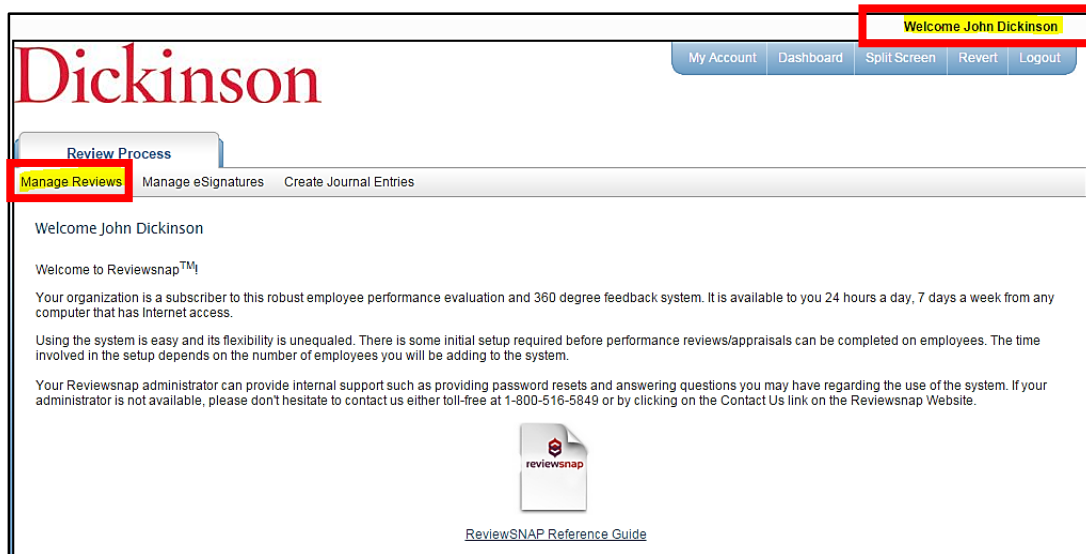
Discuss with your supervisor if any changes to the Job Description are needed.

Verify **Department, Manager & Hire Date** too.

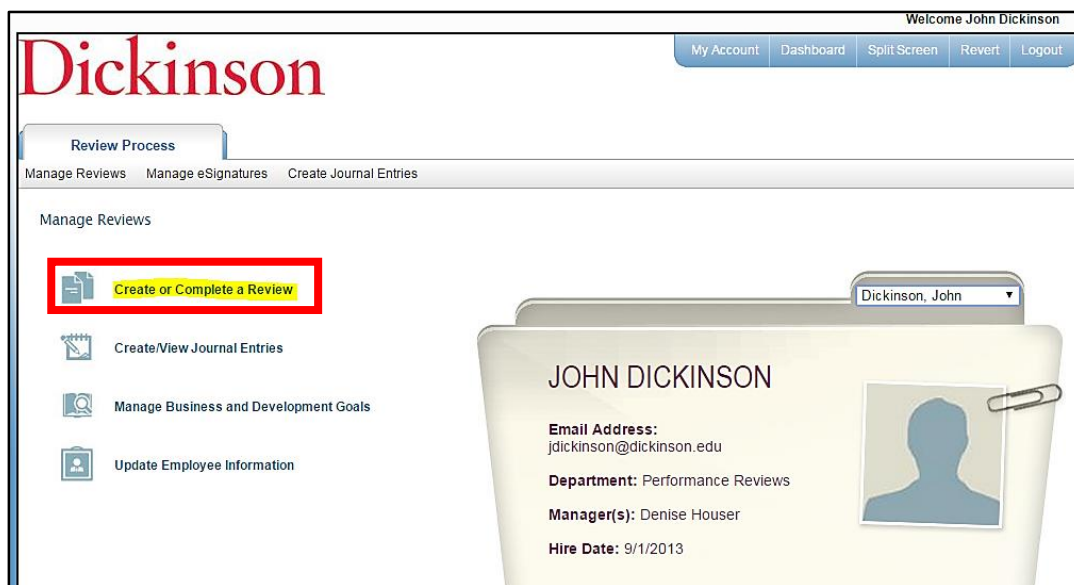
Also notice if you did a review last year you can find it under **View Completed Reviews**.



Click on **Manage Reviews**. Notice your name on the top right corner of window.



Click **Create or Complete a Review**



Click on the drop down arrow to choose the review period.

Dickinson

My Account Dashboard Split Screen Revert Logout

Review Process

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: Create a New Review

Select an available review period to create this review for.

Select One

Back to Manage Reviews

Click on the drop down box to choose the template, and then click ok.  
The **Are you sure...** dialog box appears, click **OK**.

Dickinson

Welcome John Dickinson

My Account Dashboard Split Screen Revert Logout

Review Process

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: Select a Template

Select a template to create this review from:

Demonstration

Are you sure this is the Template you want to use for this review?

OK Cancel

Verify the information to be sure it is correct, and click the **Continue** button.

Dickinson

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Review Process

Manage Reviews Manage eSignatures Create Journal Entries

Review Your Selections

Review the information you have selected. Once you proceed past this step, you will not be able to change template for this review period.

Employee: Dickinson, John (jdickinson@dickinson.edu)  
Review Period: 11/4/2014 - 12/5/2014  
Template Name: Demonstration

Continue Cancel Print Blank Evaluation Form

This will bring you to the instruction page of the review. When you are done click **Next**.

John Dickinson: Instructions

**Instructions**

- Review the current position description with employee and discuss performance based on each of the responsibilities listed. If changes to the position description were discussed, please make any edits and provide an updated version to Human Resource Services.
- Use the following rating scale for each performance standard. High and low ratings must be supported by specific examples of critical incidents occurring during the appraisal period.
- Standards are divided into two categories: basic performance standards, and supervisor's performance standards. Basic standards are designed to be used for all jobs. They may also write standards that are specific to the job on additional paper and attach them to the form. The supervisor's performance standards are for jobs with clearly-defined supervisory responsibilities and are used in addition to the basic and optional standards for all supervisory jobs.
- The appraisal period is identified at the top of the form. To determine ratings, only use critical incidents that took place during this appraisal period.
- When an employee receives an NPD or DNM rating, identify the critical incidents that support the rating. This rating cannot be used unless critical incidents are identified.
- When an employee receives an EE rating, define corrective action required, identify an appropriate time frame for desired results, and discuss any appropriate training needs. If verbal or written counseling has occurred on the same topic during the appraisal period, indicate dates of the counseling and identify any evidence of progress.
- Have the employee electronically sign the form when the appraisal interview is completed. The signature indicates all the information on the form has been discussed with the supervisor.

**Next** Save and Exit

You will now be on the first page of the Review. Read and Rate each competency by clicking the circle. Add details in the **Comments** area. When done click **Next**, and spell check will run on each page and then take you to the next page of the review.

management form.


**Needs Performance Development (NPD):** Needs on-the-job or outside training to gain new skills and/or knowledge. Use this rating for an employee who is newly hired, recently promoted, has assumed new responsibilities, or requires/ has requested performance development.

**Meets Expectations (ME):** Performance consistently meets expectations of the position. Use this rating for a fully-trained employee who performs all expectations of the position.

**Exceeds Expectations (EE):** Performance consistently exceeds expectations of the position. Reserve this rating for a highly-motivated employee who demonstrates superior quality work and maintains a high level of effectiveness with little or no supervision. Document specific critical incidents of behavior that illustrate this rating on the back of the performance management form.

Competency Description	NA	DNM	NPD	ME	EE
Possesses knowledge of basic functions of the job. Does not require supervisor to explain routine tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:



Words: 0

= All Competencies & Comments have been filled out.

**Next** Previous Save Only Save and Exit

Fill out the second page, and click **Next**. Notice you have the options to **Previous**, **Save Only** and **Save and Exit**.

<p><b>Needs Performance Development (NPD):</b> Needs on-the-job or outside training to gain new skills and/or knowledge. Use this rating for an employee who is newly hired, recently promoted, has assumed new responsibilities, or requires/ has requested performance development.</p> <p><b>Meets Expectations (ME):</b> Performance consistently meets expectations of the position. Use this rating for a fully-trained employee who performs all expectations of the position.</p> <p><b>Exceeds Expectations (EE):</b> Performance consistently exceeds expectations of the position. Reserve this rating for a highly-motivated employee who demonstrates superior quality work and maintains a high level of effectiveness with little or no supervision. Document specific critical incidents of behavior that illustrate this rating on the back of the performance management form.</p>																							
<table border="1"> <thead> <tr> <th>Competency Description</th> <th>NA</th> <th>DNM</th> <th>NPD</th> <th>ME</th> <th>EE</th> </tr> </thead> <tbody> <tr> <td>Analyzes situation before making decisions. Obtains feedback from appropriate individuals before making decisions.</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Follows policies and procedures. Maintains confidentiality.</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> </tbody> </table>						Competency Description	NA	DNM	NPD	ME	EE	Analyzes situation before making decisions. Obtains feedback from appropriate individuals before making decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Follows policies and procedures. Maintains confidentiality.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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<p>= All Competencies &amp; Comments have been filled in.</p> <div> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Save Only"/> <input type="button" value="Save and Exit"/> </div>																							

Continue each page until you get to the **Job Description Page**. Add your details.

Mary Dickinson:

---

✓ **JOB DESCRIPTIONS**

Did you review the current Job Description? (yes or no)

[Redacted]

Words: 0

Did you make any changes to the Job Description? (yes or no)  
(Any recommended changes need Supervisor approval prior to being sent to Human Resources)

[Redacted]

**Review Progress in Meeting Goals.** This is where all the current goals will be populated (for current review period). Give it a rating.

**Review Process**

Manage Reviews Manage eSignatures Create Journal Entries

Mary Dickinson: Review of Progress in Meeting Goals

**Scale Legend**

Below Expectations (BE): Does not meet expectations  
Meets Expectations (ME): Does meet expectations  
Exceeds Expectations (EE): Exceeds expectations

☒ Individual Goal

Goal Description	Update	BE	ME	EE
Supervisor Training	<a href="#">Update</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

☒ Department Goal

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

Click **Next** to create new Goals for the next upcoming Review Period.

**Dickinson**

My Account Dashboard Split Screen Revert Logout

**Review Process**

Manage Reviews Manage eSignatures Create Journal Entries

Mary Dickinson: Performance Plan for Upcoming Review Period -- List of Goals

Create a Goal

Goal Name	Due Date	Actions	Category
Supervisory Training...		Take supervisory sessions in July	Individual Goal

[Update](#)

[Previous](#) [Next](#) [Save and Exit](#)

## Creating Goals

Click **Create a Goal**, click **Next**.

**Review Process**

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: Performance Plan for Upcoming Review Period -- List of Goals

[Create a Goal](#)

Goal Name	Due Date	Actions	Category
Training...			

[Update](#)

[Previous](#) [Next](#) [Save and Exit](#)

Choose **Goal type** from drop down box.

John Dickinson: Update a Goal

Category: Individual Goal

Goal Description:

Create Date: 1/7/2015

Due Date:

Make sure to click the **Allow Rollover To Next Review Period**.

Choose the **Status** of the Goal. Add any **Action/Comments**.

Click **Create** when finished.

If you have several goals, click the **Crate and Add New Goal** button.

☒ Allow Rollover to next Review Period.

Status: On Target

Actions/Comments:

Words: 0

Create Cancel Create and Add New Goal

After you have finished adding the goals click **Next**.

Review Process

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: Performance Plan for Upcoming Review Period -- List of Goals

[Create a Goal](#)

Goal Name	Due Date	Actions
Training...		<a href="#">Update</a>
Supervisor Training...		<a href="#">Update</a>

[Previous](#) [Next](#) [Save and Exit](#)

**Development Plan Goals/Progress** (This is where all current Development Goals will be populated to be included in review process as shown below.)  
Add any **Comments**. Click **Next**.

Review Process

Manage Reviews Manage eSignatures Create Journal Entries

Mary Dickinson: [Review of Progress in Development Plan](#)

Certification/Degree	Goal Description	Status
Certification training		On Target
	7 Habits of Highly Effective People	Incomplete

Comments:

[Previous](#) [Next](#) [Save and Exit](#)

You can add future Development Goals here by clicking **Create a Goal**.  
Click **Next** when you are done.

Dickinson

My Account Dashboard Split Screen Revert Logout

Review Process

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: [Development Plan for Upcoming Review Period -- List of Goals](#)

[Create a Goal](#)

Goal Name	Due Date
No goals are defined. Add a goal, by clicking "Create a Goal" above.	

[Previous](#) [Next](#) [Save and Exit](#)



Now you are ready to hand it off to your manager.  
Select the **Click here** to hand this review to your manager.

Welcome John Dickinson

**Dickinson**

My Account Dashboard Split Screen Revert Logout

**Review Process**

Manage Reviews Manage eSignatures Create Journal Entries

John Dickinson: Finalize Review

**Click here to hand off this review to your manager.**

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

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

Once Manager has completed your Evaluation, you will electronically sign your review by logging into Review Snap.  
Click **Create or Complete a Review**; and then **Signatures**.

**Dickinson**

My Account Dashboard Split Screen Announcements 5 Logout

Administration **Review Process** Review Setup Reporting

Manage Employees Manage eSignatures Create Journal Entries Manage Review Templates

Manage eSignatures

All	Review Period Name	Period Start Date	Period End Date	Employee	Reviewer	View	Comments	<b>Signatures</b>	Update
<input type="checkbox"/>	Demo	11/4/2014	12/5/2014	Dickinson, John	Dickinson, John	<a href="#">View</a>	<a href="#">Comments</a>	<b>Signatures</b>	<a href="#">Update</a>

[Sign](#)

Type your name and click **Sign**

**Dickinson**

Administration **Review Process** Review Setup Reporting

Manage Employees Manage eSignatures Create Journal Entries Manage Review Templates

eSignature for Review

Review Period: 11/4/2014 - 12/5/2014

Type	Name	Signature	Date	Actions
Employee	John Dickinson	John Dickinson	11/24/2014	<a href="#">Delete</a>
Manager	Denise Houser	<b>Denise Houser</b>	11/24/2014	<b>Sign</b> <a href="#">Delete</a>

[Back to Manage Reviews](#)