

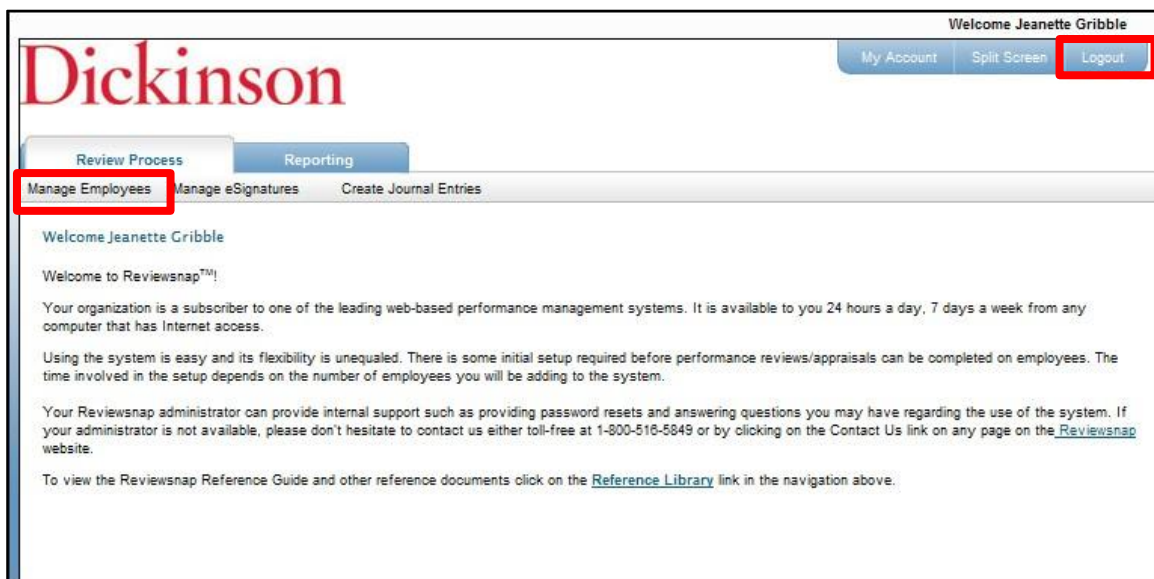
ReviewSnap Procedures for Managers at Dickinson College Six Month Review for an Administrative Exempt Employee

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

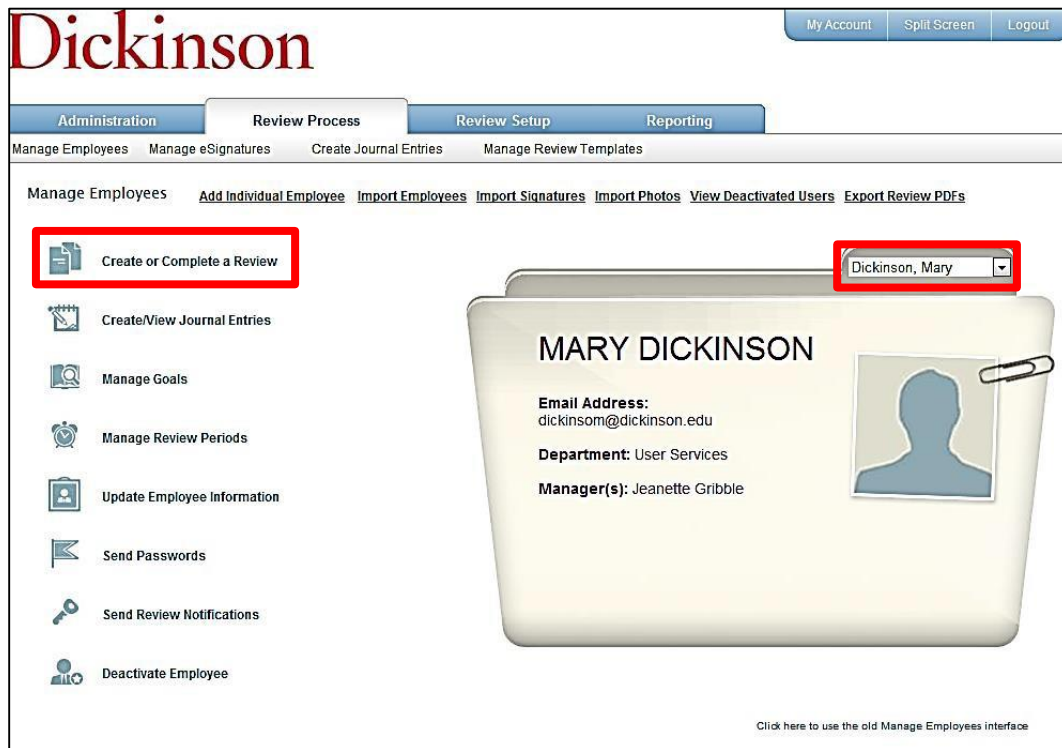
Create or Complete a Review

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.

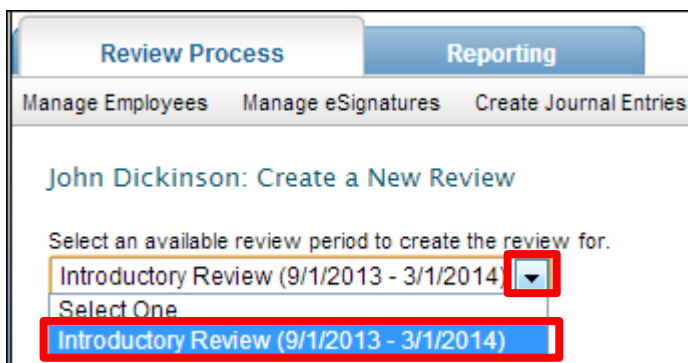
In the **Manage Employees** area, select the user that you want to review by clicking on the drop down arrow found on the folder. The names of all employees that report to you should appear on this list. Select the employee you want then click on **Create or Complete a Review**. For this review the manager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



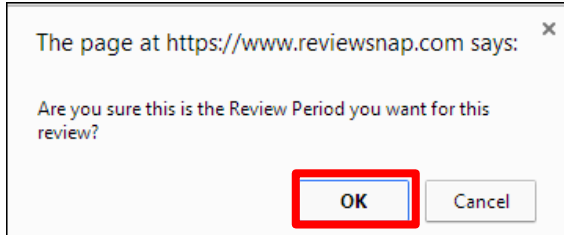
You are now starting the **Review** evaluation process in ReviewSnap.

Select an available review period to create the review for.

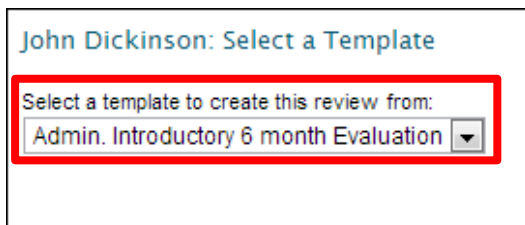
Click the drop down arrow to select the **Introductory Review**.



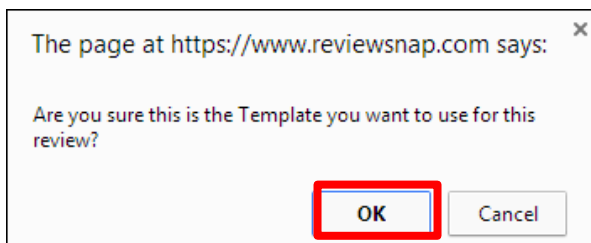
At the **Are you sure** dialog box message appears, click **OK** to continue.



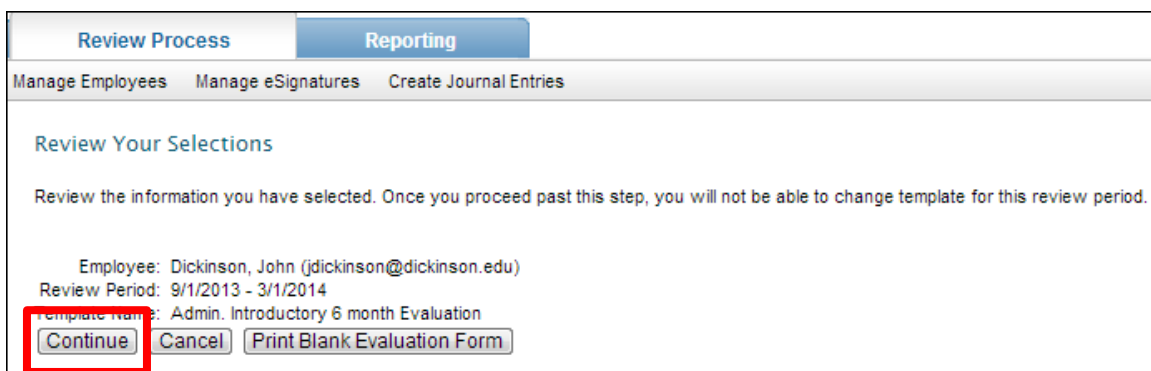
Select the **Admin Introductory 6 month Evaluation** in the drop down arrow.



Click **OK** to continue.



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



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

Instructions

John Dickinson: Review of Performance

Instructions

If you recall we indicated in the appointment letter that continued employment would be subject to completion of the six 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.

Two dialog boxes are to be filled out with details about the Employee.

Employee

1. Comment on the employee's major accomplishments during the evaluation period.

Details about Johns accomplishments

2. Comment on any areas for improvement/growth for the employee.

Area of Improvements for John

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

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

Click **Next**. At any time you can click on **Save Only** or to **Save and Exit** 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**.

You are now in the **Comments** area. Fill in details for each section.

John Dickinson: Review of Performance

Comments

Comment on the employee's efforts to:

A. Communicate with peers, subordinates, students and the campus community;

B. Encourage a team-approach;

C. Motivate/assist in the development of others;

Scroll down for more areas.

D. Cooperate with individuals inside and outside the department;

4. Comment on the extent to which the employee has a clear understanding of the mission of the College and the role that his/her department/division plays in furthering the goals of the institution.

At any time you can click on **Save Only** or to **Save and Exit** button found at the bottom.



Click **Next** to continue.

You are now in the **Administrator Performance Appraisal** section.

A screenshot of a web application interface for 'John Dickinson: Review of Performance'. The main section is titled 'Administrator Performance Appraisal' and is highlighted with a red box. Below the title, there is a prompt: 'Comment on the employee's goals and objectives for next year.' This is followed by two text input areas, each with a rich text editor toolbar. The first area is labeled 'A. What goals would you like the employee to accomplish?' and the second is labeled 'B. What additional skills or improvement in skills are needed to achieve these goals?'. At the bottom of the form, there is a green checkmark icon and the text '= All Competencies & Comments have been filled-out'. Below this, there is a navigation bar with four buttons: 'Previous', 'Next', 'Save Only', and 'Save and Exit'. The 'Previous', 'Next', and 'Save and Exit' buttons are enclosed in a red rectangular box.

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 the **Next** button to get to the final section called **Overall Comments**. Fill in the dialog boxes as shown below.

John Dickinson: Review of Performance

Overall Comments

Respond to comments, questions and suggestions on departmental policies and procedures and job responsibilities.

As the supervisor, do you recommend the retention of this employee? If not, please explain.

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

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

Once these sections are completed click the **Next** button to another page to fill in details.

Review Process **Reporting**

Manage Employees Manage eSignatures Create Journal Entries

John Dickinson: Overall Comments

Overall Comments:

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

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.

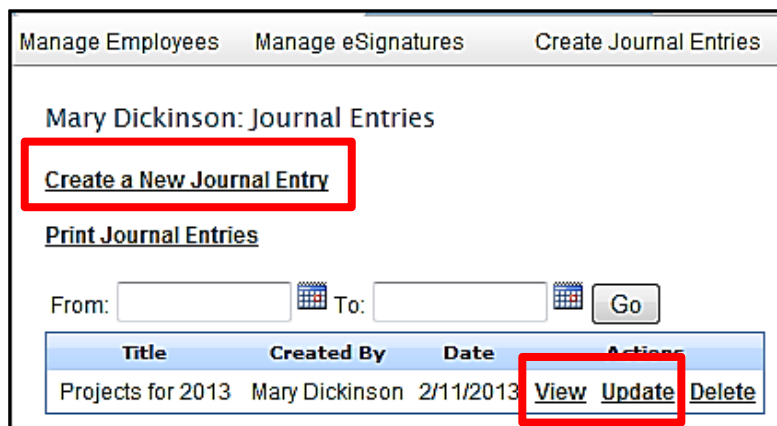
To create or update a **Journal Entry** click the **Review Process** tab, then click on the **Manage Employees** link. Depending on your division you may not use this area of ReviewSnap.

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.

