



Performance Management System Reference Guide – Managers

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Have question? Contact your Account Manager or call
reviewsnap™ at 1-800-516-5849



The **reviewsnap**™ performance management system is a complete, web-based, on-demand system. You can access and manage your individual and direct reports performance reviews, goals and 360 degree feedback surveys simply by logging in from any computer that has access to the Internet.

As you use the system, remember that you will manage the processes largely from the navigation tabs across the top of each page. The **reviewsnap**™ performance management system is easy to use. If you are unable to access any of the features described in this guide, contact your System administrator.

If you need further assistance, call **reviewsnap**™ Customer Service at **1-800-516-5849**



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Welcome Page

The Welcome Page is the opening page and includes the main navigation tabs with category tabs under each main tab.



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Welcome Page

Dashboard

By clicking the Dashboard, you can now go direct to see any outstanding items and click on a link to complete those actions directly on that page.



Dashboard

Reviews		
	Review Period	Due
Kathy Sullivan	1/1/2014 - 12/31/2014	8/1/2014
Signatures		
Goals		
360s		

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Welcome Page

Split Screen

Click Split Screen to view multiple documents at the same time. you can reference Performance Reviews, 360 Degree Surveys, Goals, and Journal Entries while you are completing a review.

Welcome Ken Gray

My Account | Dashboard | **Split Screen** | Use Mobile App | Logout

reviewsnap

Review Process | Reporting

Manage Employees | Manage eSignatures | 360 Degree Surveys | Create Journal Entries | Discussions

Reviewsnap

Kathy Sullivan: Review of Performance

Instructions

The (Company) is dedicated to providing each employee with an objective performance appraisal. The purpose of a performance appraisal is to provide direct, specific feedback in order to enhance performance.

The thought and accuracy in which this appraisal is conducted will determine the overall benefit to the employee and to our organization.

Instructions:
Managers are requested to complete core competencies listed on the review form. Select the most appropriate performance rating that reflects the employee's demonstrated performance level. The comments section allows for additional explanations.

Accountability/Responsibility

Split Screen

Employee: Sullivan, Kathy | Action: Performance Reviews

Kathy Sullivan: View Performance Reviews

Review Period Name	Period Start Date	Period End Date	Reviewer	Status	Actions
2014-Annual Review	1/1/2014	12/31/2014	Gray, Ken	Complete	View
2014-Annual Review	1/1/2014	12/31/2014	Self	Incomplete	View
2013-Annual Review	1/1/2013	12/31/2013	Gray, Ken	Complete	View
2012-Annual Review	1/1/2012	12/31/2012	Gray, Ken	Complete	View
2011-Annual Review	1/1/2011	12/31/2011	Gray, Ken	Complete	View

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Welcome Page

Mobile Site

The mobile app is now live, and users can complete reviews, 360 degree surveys, manage goals, create journal entries, and sign off on reviews through any mobile device.



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Review Process Manage Reviews

Manage Reviews

Create or Complete a Review

Navigate to Manage Reviews:

Click: Create or Complete a Review

The screenshot displays the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray". Below this is a navigation bar with links for "My Account", "Dashboard", "Split Screen", "Use Mouse Idle", and "Logout". The main navigation area includes "Review Process" and "Reporting" tabs. Under "Review Process", there are links for "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". The "Manage Employees" section is active, showing a list of actions: "Create or Complete a Review" (highlighted with a red arrow), "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". To the right, a folder icon represents an employee's profile for "KEN GRAY". The folder contains a photo of Ken Gray and the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/10/2008".

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Review Process Manage Reviews

Manage Reviews

Create or Complete a Review

Select an employee and click Create or Complete a Review

Select an available review period then click Continue

Select a review template then click Continue

Confirm employee, review period, and template information then click Continue

Note: Once you proceed past this step, you will not be able to change template for this review

Kathy Sullivan: Create a New Review

Select an available review period to create the review for.

2014-Annual Review (1/1/2014 - 12/31/2014) ▼



Kathy Sullivan: Select a Template

Select a template to create this review from:

Employee Performance Review ▼



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: Sullivan, Kathy (ksullivan@reviewsnap.com)

Review Period: 1/1/2014 - 12/31/2014

Template Name: Employee Performance Review

Continue Cancel Print Blank Evaluation Form



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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

Provide competency ratings and comments as required

Competency Description	N/A	U	BE	ME	EE	O
Recognizes job priorities and works accordingly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Demonstrates complete understanding of all facets of his/her job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Comments/Suggestions: Comment Suggestions

I feel my my knowledge is very good and I do it well. There is always room to increase my specific Job facets

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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

Enter goal ratings and comments as required then click Next

(Optional Step) Set goals for the upcoming review period then click Next

Kathy Sullivan: Review of Progress in Meeting Goals

Scale Legend

- Not Applicable (N/A): Employee too new to be rated or competency not applicable to employee.
- Unacceptable (U): Performance is inadequate and inferior to the standards of performance required for this position. Performance at this level cannot be allowed to continue.
- Below Expectations (BE): Performance does not consistently meet the standards of performance for this position. Serious effort to improve performance is needed.
- Meets Expectations (ME): Performance consistently meets the standards of performance for this position.
- Exceeds Expectations (EE): Performance regularly exceeds the standards of performance for this position.
- Outstanding (O): Performance is consistently far superior to the standards for this position.

Company Goal
Project

Goal Description: Create new media contact list Update N/A U BE ME EE O

Comments: On target

Kathy Sullivan: Performance Plan for Upcoming Review Period -- List of Goals

[Create a Goal](#)

Goal Name	Due Date	Actions	Category
Displays commitment to achieving overall company goals and objectives...			Company Goal Update
Obt certification as a Media Buyer through the Ad Media Association...	6/15/2015		Training-Skill Enhancement Update

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

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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

Provide summary comments as required then click Next

Note: At any step during the process, the review may be saved and accessed at another time for completion by clicking Save and Exit.

To continue the Review, click Create or Complete a Review, then click Continue.

Kathy Sullivan: Overall Comments

Overall Comments:

I really enjoy my job and feel I am a valued team member

Previous Next Save Only Save and Exit

Kathy Sullivan: Complete an Existing Review

Review Period	Start Date	End Date	Reviewer	Actions
2014-Annual Review	1/1/2014	12/31/2014	Gray, Ken	View Reviewers Continue



Review Process Manage Reviews

Manage Reviews

Create or Complete a Review

If Self Review is combined with Manager review, the employee will handoff their self review to their manager. The manager will be notified of the hand off and can continue completing the review.

As the manager is completing their portion, they have the option to see the employee's ratings/comments.

Click the Bold + next to the comp/comment.

Note: Refer to Reference Library for additional information on the self review/Mgr process

The screenshot displays the Review Process interface in two stages. The top stage shows a manager's view of an employee's review. The 'Competency Description' table has two rows: '+ Reinforces team members in a positive manner for their contributions.' and '+ Is adaptive to other team members' personalities and values.' The second row is highlighted in blue, and a red arrow points to it. Below the table is a 'Comments/Suggestions' section with a text area containing 'Kathy is the consummate team player and consistently demonstrates her desire to be part of an effective team.' and buttons for 'Next', 'Save Only', and 'Save and Exit'. The bottom stage shows the manager's view after clicking the 'Bold +' icon next to the second competency description. The text in the 'Comments/Suggestions' section is now bolded. A red arrow points to the 'Bold +' icon. Below the 'Comments/Suggestions' section is a 'Comments from Other Reviewers' section with a text area containing 'Name: Kathy Sullivan' and 'Comment: I think my team contributions really help the dept and company'. Buttons for 'Next', 'Save Only', and 'Save and Exit' are also present.

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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

Mark the review ready for signatures

Note: If reviews do not require electronic approval signatures, then Manager should just **'Finalize'** the review.

Before setting up eSignatures, the manager has an option to **Send a notification about this review** to another manager or the employee to view the review. Check name and enter a note, then click Send.

Kathy Sullivan:

→ [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.

Select the manager(s) you want to send the notification to.

- Bayer, Tim
- Baylor, Jan
- Sullivan, Kathy (Review will be attached to email)

Note:

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Manage Reviews

Create or Complete a Review

Mark the review ready for signatures

Select additional manager(s) to require signature(s) then click Submit.

Note: If other managers are selected you may be given the opportunity to select the appropriate manager sign-off order.

Review Process Manage Reviews

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.

- Bayer, Tim
 Baylor, Jan
 Gray, Ken

Submit

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

Manager
Ken Gray
Jan Baylor

Continue

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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

Note: Signature order is determined by the system administrator i.e.

Manager(s), Employee, HR (optional)

Click Signatures

The order of sign offs will be displayed

Manager, Ken Gray types his name in box and **clicks Sign**

Kathy Sullivan: Complete an Existing Review

Review Period	Start Date	End Date	Reviewer	Actions				
2014-Annual Review	1/1/2014	12/31/2014	Gray, Ken	View	Reviewers	Comments	Signatures	Continue



Type	Name	Signature	Date	Actions
Manager	Ken Gray	<input type="text" value="Ken Gray"/>	9/26/2014	<input type="button" value="Sign"/>
Manager	Jan Baylor	not signed		
Employee	Kathy Sullivan	not signed		



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Review Process

Manage Reviews

Manage Reviews

Create or Complete a Review

After the manager/reviewer signs, the next person on the list will receive a notification that a review is ready for their signature.

Signer clicks link to their eSignature page

Signer types in their name and clicks Sign

This process is then repeated to the employee to sign their review

Subject: [Reviewsnap Review Ready for Your Signature](#)
From: info@reviewsnap.com
Date: 9/26/14 4:21 pm
To: [janb@reviewsnap.com](#)

This e-mail is to inform you the following review is now ready for your sign-off:

Review Period	Reviewer	Employee
1/1/2014-12/31/2014	Ken Gray	Kathy Sullivan

→ [Click here to view your eSignatures page](#)

Review Period Name	Period Start Date	Period End Date	Employee	Reviewer	Actions			
2014-Annual Review	1/1/2014	12/31/2014	Sullivan, Kathy	Gray, Ken	View	Comments	Signatures	Update

Type	Name	Signature	Date
Manager	Ken Gray	Ken Gray	9/26/2014
Manager	Jan Baylor	<input type="text" value="Jan Baylor"/>	<input type="button" value="Sign"/> 9/27/2014
Employee	Kathy Sullivan	not signed	

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Review Process View Completed Reviews

Manage Reviews

View Completed Reviews

To view completed self-reviews and/or manager reviews:

Navigate to Manage Reviews / View Completed Reviews

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Review Process

View Completed Reviews

Manage Reviews

View Completed Reviews

Click View to open a copy of a completed review for viewing, saving and/or printing

Click comments to view or print any comments that were added during the signature stage

Note: The ability to view a signed and finalized review must be granted by your manager or the system administrator.

Kathy Sullivan: View a Completed Review

Review Period Name	Period Start Date	Period End Date	Reviewer	Actions
2014-Annual Review	1/1/2014	12/31/2014	Gray, Ken	View Reviewers Comments
2013-Annual Review	1/1/2013	12/31/2013	Gray, Ken	View Reviewers
2012-Annual Review	1/1/2012	12/31/2012	Gray, Ken	View Reviewers
2011-Annual Review	1/1/2011	12/31/2011	Gray, Ken	View Reviewers



Review Process Create/View Journal Entries

Create/View Journal Entries

Journal entries are ad hoc notes that can be made at any time. To create new entries and/or update entries that you have previously created on yourself:

Navigate to Manage Reviews / Create/View Journal Entries

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" with links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Below this, a secondary menu lists "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". The "Manage Employees" section is expanded, showing a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries" (highlighted with a red arrow), "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". To the right, a folder icon for "KEN GRAY" is shown, containing a profile card with the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008".

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Review Process

Create/View Journal Entries

Create/View Journal Entries

Create, print, and/or filter Journal Entries.

As a manager, Journal entries can be created in your record or any of your direct reports.

Note: The paperclip icon indicates that the entry has an associated attachment.

Kathy Sullivan: Journal Entries

[Create a New Journal Entry](#)

[Print Journal Entries](#)

From:  To: 

Goal Status

Title	Created By	Date	Actions
Update goals		2/28/2014	View

Review Status

Title	Created By	Date	Actions
Review-2014		8/12/2014	View
 2013 Annual Review		6/23/2014	View

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Review Process

Create/View Journal Entries

Create/View Journal Entries

Add new entries and/or update existing entries

Note: Private entries are only visible to the person who created them.

External documentation, such as prior year performance reviews, can be linked to the **reviewsnap™** system using the Journal Entry functionality. Simply create an entry and browse to where the file is stored.

Kathy Sullivan: Create a Journal Entry

Private Entry:

Category: Meeting

Journal Title: Meeting on Media Buyers List

Journal Entry:

I have attached the meeting notes that were for the Marketing meeting on status of the media buyers list

Words: 19

Attachment: No file chosen
(* PDF, XLS, XLSX, CSV, DOC, DOCX, EML, MSG, JPG, GIF, or MP3)

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Create/View Discussions

Create/View Discussions

Discussions between managers can be created or viewed.

Navigate to **Manage Reviews / Create/View Discussions**

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray". Below that are navigation links: "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Under "Review Process", there are links for "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". The "Manage Employees" section is expanded, showing a list of options: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions" (highlighted with a red arrow), "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". To the right, there is a folder icon for "Gray, Ken" containing employee information: "KEN GRAY", "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008".

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Review Process Create/View Discussions

Create/View Discussions

Click View to read or add to a discussion

This was a discussion started by Jan Baylor to Ken Gray

Ken added a post to the discussion and Jan will receive a notification that Ken responded to her discussion.

Ken Gray: Discussions

[Create a Discussion](#)

From: To:

Title	Created By	Date	Archived	Actions
Marketing Media List	Jan Baylor	9/27/2014		View ←
Ken Gray Marketing Plan	Tim Bayer	4/27/2013		View

Ken Gray: Marketing Media List

Users who can view this discussion:

Roles: Administrator Manager

Managers: Jan Baylor

Active Participants: Jan Baylor, Ken Gray

Add Participant:

Created by Jan Baylor on 9/27/2014 at 7:31 AM



Jan Baylor

Has the Marketing Media list been updated by Kathy?

9/27/2014 at 7:32 AM



Ken Gray

The Media list is up to date. ←

9/27/2014 at 7:34 AM

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Review Process

Create/View Discussions

Create/View Discussions

Click to Create a Discussion

Enter Discussion Title and click create

Add a Participant to the discussion

The discussion can be continued by either manager by logging into their record, click Discussions and select their name on list. Then click the post and add another comment. The other manager will then be notified that a discussion has been updated with another post.

Marvin Ellis: Discussions

[Create a Discussion](#)



Marvin Ellis: Create a Discussion

Users who can view this discussion:

Roles: Administrator Manager

Managers: Jan Baylor

Active Participants: Tim Bayer

Discussion Title:



Private Discussion



Users who can view this discussion:

Roles: Administrator Manager

Managers: Jan Baylor

Active Participants: Tim Bayer

Add Participant:



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Review Process Manage Business and Development Goals

Manage Business and Development Goals

To manage your goals and your direct reports:

**Navigate to Manage Reviews / Manage Business and
Development Goals**

Click the employee to add/update a goal

Note: The Administrator determines if the employee
can manage their own goals.

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" and has links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Below this, there are links for "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". The "Manage Employees" section is active, showing a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals" (highlighted with a red arrow), "Manage 360 Degree Surveys", and "Update Employee Information". To the right, a detailed view of Ken Gray's profile is shown, including his name, email address (gray@reviewsnap.com), location (Cape Coral), job title (Director of Marketing), department (Sales/Marketing), manager(s) (Jan Baylor), and hire date (6/15/2008).

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Review Process Manage Business and Development Goals

Manage Business and Development Goals

Select the appropriate review period

Click add business goals and/or update existing goal details

Note: If an employee is allowed to update their goals, then the manager has an option to **Lock All Current Goals**, which means the employee cannot modify or update their goals.

Click add development goals details

Review Period:

Kathy Sullivan: Manage Business Goals

[Add a Goal](#) [Print Goals](#)

Name	Due Date	Status	Category	
<input type="checkbox"/> Displays commitment to achieving overall company goals and objectives.		<input type="text" value="On Target"/>	Company Goal	Update
<input type="checkbox"/> Get certification as a Media Buyer through the Ad Media Association	6/15/2015	<input type="text" value="New Goal - Not Yet Started"/>	Training-Skill Enhancement	Update

Kathy Sullivan: Manage Development Goals

[Add a Goal](#) [Print Goals](#)

Name	Due Date	Status
------	----------	--------

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Review Process Manage Business and Development Goals

Manage Business and Development Goals

Business Goals

Add business goals and/or update existing goal details

Click **Create** to save the entry and exit this screen

Click **Cancel** to exit this screen without saving the entry

Click **Create and Add New Goal** to save the entry and remain in this screen to enter another

Katry Sullivan: Create a Goal

Category: Project

Goal Descriptor:

Create a Media Ad Rate Guide

Create Date: 9/24/2014

Due Date: 8/1/2015

Allow Rollover to next Review Period

Status: New Goal - Not Yet Started

Actions/Comments:

Create

Cancel

Create and Add New Goal



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Review Process Manage Business and Development Goals

Manage Business and Development Goals

Development Goals

(Optional) Add Development goals and/or update existing goal details

Click Create to save the entry and exit this screen

Click Cancel to exit this screen without saving the entry

Click Create and Add New Goal to save the entry and remain in this screen to enter another

Kathy Sullivan: Create a Development Goal

Category: Training

Goal Description:

Take course on Time Management

Words: 5

Create Date: 9/24/2014

Due Date: 3/15/2015

Allow Rollover to next Review Period. *The Next Review Period Has Not Been Created

Status: New Goal - Not Yet Started

Competency Group(s):

- Communications Skills
- Organizing and Time Management
- Professional Development

Create Cancel Create and Add New Goal

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Review Process Manage Business and Development Goals

Manage Business and Development Goals

If a goal is to be carried forward to the next review period, then check 'Allow Rollover to Next Review Period'

If this box was not checked, then selected goals can still be copied to the next active review period. Check box on the goal, then select Review period to copy to, then click 'Copy Selected Goals to'

Category:

Goal Description: Displays commitment to achieving overall company goals and objectives.

Create Date: 8/12/2014
Due Date:

Allow Rollover to next Review Period. *The Next Review Period Has Not Been Created

Goal Name	Due Date	Status	Category
<input checked="" type="checkbox"/> Displays commitment to achieving overall company goals and objectives	12/31/2015	On Target	Company Goal
<input checked="" type="checkbox"/> Create new media contact list	10/30/2014	Moderately ahead of schedule	Project

Copy Selected Goals To:

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Review Process Manage 360 Degree Surveys

Manage 360 Degree Surveys

Navigate to Review Process / Manage 360 Degree Surveys

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray". Below that is a navigation bar with "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation area has two tabs: "Review Process" (selected) and "Reporting". Under "Review Process", there are several menu items: "Manage Employees", "Manage eSignatures", "360 Degree Surveys" (highlighted with a red arrow), "Create Journal Entries", and "Discussions". Below this is a section titled "Manage Employees" with a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys" (highlighted with a red arrow), and "Update Employee Information". To the right of the list is a folder icon representing an employee's profile for "KEN GRAY". The folder contains a photo of Ken Gray and the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008".

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Review Process

Manage 360 Degree Surveys

Manage Employees

Manage 360 Degree Surveys

Click Create 360 Degree Survey

Note: Managers can create a 360 Degree Survey for any direct report, but not on themselves.

Complete the survey details

Options:

Check: Show Raters names on Summary- Names only appear on the header page

Check: Allow Employee to Self Review

Check: Break-out Employee Self Review Ratings- Recommended so they won't be included in the overall ratings

Check: Break-out Ratings by Rater Type, i.e. Peer, Direct Report, etc.

Kathy Sullivan

Manage Open 360 Degree Surveys

→ [Create 360 Degree Survey](#)

Target End Date	Administrator	Description	Actions
There are currently no open 360 Degree Surveys for this employee.			

Create 360 Degree Survey

Survey Description:

Target End Date: (M/d/yyyy)

Select Template:

Show Raters Names on Summary

Allow Employee to Self-Review

Break-out Employee Self-Review Ratings

Break-out Ratings by Rater Type

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process

Manage 360 Degree Surveys

Manage Employees

Manage 360 Degree Surveys

Click Add Raters & click Find

Select a rater type and click Assign for each individual that should be included in the 360 degree survey

Please enter criteria for the employee(s) you wish to search for and press "Find." Or simply click the "Find" button to show a list of available employees.

If you need to add a rater that is not part of your company, please [click here to add the external rater](#).

First Name:

Last Name:

Job Title:

Location:

Department:

Find

Find the employee you wish to add as a rater for the selected 360° review; select the appropriate Rater Type and click the "Assign" button next to their name.

First Name	Last Name	Job Title	Location	Department	Type	Action
Thomas	Baily	Director of Information Systems	Cape Coral	Information Systems	Other ▾	Assign
Tim	Bayer	Business Account Manager	Cape Coral, Florida	Executive	Supervisor ▾	Assign
Jan	Bayer	Region Director	Cape Coral	Executive	Supervisor ▾	Assign
Bill	Brown	Director of Operations	Cape Coral	Operations	Other ▾	Assign
Marvin	Ellis	Director of Finance	Cape Coral	Finance	Other ▾	Assign
Ken	Gray	Director of Marketing	Cape Coral	Sales/Marketing	Other ▾	Assign
Sally	Hall	HR Generalist	Des Moines	Human Resources	Peer ▾	Assign

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process

Manage 360 Degree Surveys

Manage Employees

Manage 360 Degree Surveys

Note: External raters (e.g. clients) may also be added.

Click: Save and Notify New Raters

You may add more raters, delete raters, and send reminders at any point until the survey is finalized

Once a rater has finalized their individual input, you may view their survey by clicking View

Note: Only the survey administrator (the person who sets up the survey) may see the individual rater input.

The Survey will be Finalized After All Raters Have completed.

Note: This setting must be checked in Manage Company Information – 360 Surveys

Add Raters

Name	Type	Status	Actions
Bayer, Tim	Supervisor	Not Started	Reminder Delete
Baylor, Jan	Supervisor	Not Started	Reminder Delete
Brown, Bill	Other	Not Started	Reminder Delete
Ellis, Marvin	Other	Not Started	Reminder Delete
Gray, Ken	Other	Not Started	Reminder Delete
Hall, Sally	Peer	Not Started	Reminder Delete
Livingston, Jamie	Self	Not Started	Reminder





Review Process

Manage 360 Degree Surveys

Manage Employees

Manage 360 Degree Surveys

To view the survey summary for a completed 360 degree survey for your employee:

Click View Summary to open a copy of a completed survey for viewing, saving and/or printing

Note: Survey summaries are anonymous consolidations of all rater input.

Click Allow Employee to View if you would like the subject of the survey to be able to view/save/print the survey summary.

Note: Once this button is clicked, the ability for the employee to view the summary cannot be revoked.

Click Raters to view individual survey input

Note: Only the survey administrator (the person who assigned the survey) may see the individual rater input.

Completed 360 Degree Surveys

End Date	Administrator	Description	Actions
9/27/2014	Gray, Ken	Kathy Sullivan 360 Survey	View Summary Raters Duplicate <input type="button" value="Allow Employee to View"/>





Review Process Update Employee Information

Update Employee Information

To update your password:

Navigate to Manage Reviews / Update Employee Information

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray". Below the logo, there are navigation tabs for "Review Process" and "Reporting". Under "Review Process", there are links for "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". The "Manage Employees" link is selected, leading to a list of actions:

- Create or Complete a Review
- View Completed Reviews
- Create/View Journal Entries
- Create/View Discussions
- Manage Business and Development Goals
- Manage 360 Degree Surveys
- Update Employee Information ←

To the right of this list is a folder icon representing an employee's profile for "KEN GRAY". The folder contains the following information:

- Email Address: gray@reviewsnap.com
- Location: Cape Coral
- Job Title: Director of Marketing
- Department: Sales/Marketing
- Manager(s): Jan Baylor
- Hire Date: 6/15/2008

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Update Employee Information

Update Employee Information

To update your password:

Type the new password in both fields and click Update

Note: If you have attempted to login 5 times and failed, the system will automatically lock you out from attempting another login. When this happens, contact your system Administrator to assign a new password. After successfully logging in, you can then change your password and hit update.

Employee Information

Username: gray@reviewsnap.com

Change Current Password:

Confirm Changed Password:

• Minimum required length: 6 characters

• Must include at least 2 of the following character types: uppercase, lowercase, numbers, and special characters

Email: gray@reviewsnap.com

First Name: Ken

Last Name: Gray

Update

Cancel

Have question? Contact your Account Manager or call
reviewsnap™ at 1-800-516-5849



Review Process Compensation Dashboard

Compensation Dashboard

The **reviewsnap**™ compensation tracking and management solution provides the tools to create a pay-for-performance environment.

Note: This module must be turned on by the Administrator.

Managers will be allowed to view their Department employee's compensation and make recommendations for increases.

Refer to the Compensation Dashboard Guide under the Manager's role in the Reference Library.

Welcome Ken Gray

My Account | Dashboard | Self Evals | Review | Use Mobile Site | Logout

reviewsnap

Review Process | Reporting

Manage Employees | Compensation Dashboard | Manage eSignatures | 360 Degree Surveys | Create Journal Entries | Discussions

Manage Employees

- Create or Complete a Review
- View Completed Reviews
- Create/View Journal Entries
- Create/View Discussions
- Manage Business and Development Goals
- Manage 360 Degree Surveys
- Update Employee Information

Gray, Ken

KEN GRAY

Email Address: gray@reviewsnap.com

Location: Cape Coral

Job Title: Director of Marketing

Department: Sales/Marketing

Manager(s): Jan Baylor

Hire Date: 6/15/2008

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Manage eSignatures

Manage eSignatures

The system enables a paperless review process by allowing eSignatures.

When a review form requires your signature:

You will receive a system notification that your review is ready for your signature.

Navigate to Manage eSignatures and Click

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" and has links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Under "Review Process", there are several menu items: "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". A red arrow points to the "Manage eSignatures" menu item. Below the navigation bar, there is a list of actions for "Manage Employees": "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information".

The image shows an employee profile card for Ken Gray. The card is titled "KEN GRAY" and includes the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008". There is a small photo of Ken Gray on the right side of the card, with a paperclip icon next to it.

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Manage eSignatures

Manage eSignatures

Click View to read the completed review

You can add comments about your review by clicking Comments before you sign. Enter comments and click Submit.

Click Signatures and enter your name, then Submit

Note: If you sign first and do not enter any comments, Then you will need to contact the system Administrator to reset for you to add a comment.

Manage eSignatures

Review Period Name	Period Start Date	Period End Date	Employee	Reviewer	Actions		
2014-Annual Review	1/1/2014	12/31/2014	Sullivan, Kathy	Gray, Ken	View	Comments	Signatures

Employee Review Comments



Review Period: 1/1/2014 - 12/31/2014

Employee Comments (Optional):

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I think my review was very fair and I enjoy working with Ken.



[Back to Manage Signatures](#)

Type	Name	Signature	Date	Actions
Manager	Ken Gray	Ken Gray	9/25/2014	
Employee	Kathy Sullivan	<input type="text" value="Kathy Sullivan"/>	9/25/2014	<input type="button" value="Sign"/>



Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process 360 Degree Surveys

360 Degree Surveys

You will receive a system notification to be a rater for a 360 Degree Survey.

**To view 360 Degree Surveys that require your input:
Navigate to Review Process / 360 Degree Surveys**

The screenshot displays the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" with links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Below this, a secondary menu lists "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". A red arrow points to the "360 Degree Surveys" link. Under "Manage Employees", there is a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". To the right, a user profile card for "KEN GRAY" is shown, featuring a photo and the following details: Email Address: gray@reviewsnap.com, Location: Cape Coral, Job Title: Director of Marketing, Department: Sales/Marketing, Manager(s): Jan Baylor, and Hire Date: 6/15/2008.

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process 360 Degree Surveys

360 Degree Surveys

Click Start under Actions to begin survey

Provide competency ratings and comments as required, clicking Next to advance

[Optional Step] Provide summary comments as required then click Next

Finalize the survey

Note: At any step during the process, the survey may be saved and accessed at another time for completion, but it must be completed by the due date.

360 Degree Surveys

End Date	Employee	Description	Status	Actions
9/30/2014	Gray, Ken	Ken Gray 360 Survey	Not Started	Start



Ken Gray: Finalize Survey

[Click here](#) to finalize this survey. Once the survey is finalized, you will not be able to edit any portion of this survey.



[Click here](#) to exit this survey.



Review Process Create Journal Entries

Create Journal Entries

Journal entries are ad hoc notes that can be made at any time. To create new entries and/or view entries that you have previously created for others:

Navigate to Create Journal Entries

The screenshot displays the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" and includes links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar shows "Review Process" and "Reporting" tabs. Below this, a sub-menu includes "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". A red arrow points to the "Create Journal Entries" link. The "Manage Employees" section is expanded, showing a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". To the right, a folder icon represents an employee named "KEN GRAY". The folder tab is labeled "Gray, Ken". The folder contains the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008". A small photo of Ken Gray is attached to the folder with a paperclip.

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Create Journal Entries

Create Journal Entries

For an employee to create Journal Entries on any other employee, the Administrator has to check the setting to allow. If not checked, then only the employee name will appear

Select the person for whom you would like to create a journal entry

Refer to instructions for creating the journal entry on **Page 22**

Create Journal Entries

First Name	Last Name	Email	Actions
Thomas	Bally	peakperformax@outlook.com	Select
Tim	Bayer	timb@reviewsnap.com	Select
Jan	Baylor	tbayer@peakperformax.com	Select
Bill	Brown	twbayer2@gmail.com	Select
Marvin	Ellis	ellis@reviewsnap.com	Select
Ken	Gray	gray@reviewsnap.com	Select
Sally	Hall	hall@reviewsnap.com	Select
Pat	Kelly	pkelly@reviewsnap.com	Select
Jamie	Livingston	livingston@reviewsnap.com	Select
Teresa	Logan	logan@reviewsnap.com	Select

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Discussions

Discussions

Navigate to Discussions

The screenshot shows the reviewsnap web application interface. At the top right, it says "Welcome Ken Gray" with links for "My Account", "Dashboard", "Split Screen", "Use Mobile Site", and "Logout". The main navigation bar includes "Review Process" and "Reporting". Below this, a secondary menu lists "Manage Employees", "Manage eSignatures", "360 Degree Surveys", "Create Journal Entries", and "Discussions". A red arrow points to the "Discussions" link. Under "Manage Employees", there is a list of actions: "Create or Complete a Review", "View Completed Reviews", "Create/View Journal Entries", "Create/View Discussions", "Manage Business and Development Goals", "Manage 360 Degree Surveys", and "Update Employee Information". On the right side, there is a folder icon representing an employee profile for "KEN GRAY". The folder tab is labeled "Gray, Ken". The profile card includes a photo of Ken Gray and the following information: "Email Address: gray@reviewsnap.com", "Location: Cape Coral", "Job Title: Director of Marketing", "Department: Sales/Marketing", "Manager(s): Jan Baylor", and "Hire Date: 6/15/2008".

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



Review Process Discussions

Discussions

Click Select to View a discussion

Note: Only the manager's direct reports will show on the discussions list.

The post can be continued by both participants and additional participants can be added to the discussion.

Create Discussions

First Name	Last Name	Email	Actions
Ken	Gray	gray@reviewsnap.com	Select ←
Pat	Kelly	pkelly@reviewsnap.com	Select
Kathy	Sullivan	sullivan@reviewsnap.com	Select
Thomas	Tessman	tessman@reviewsnap.com	Select

Ken Gray: Marketing Media List

Users who can view this discussion:

Roles: Administrator/Manager

Managers: Jan Baylor

Active Participants: Jan Baylor, Ken Gray

Add Participant:

Remove Participant:

Created by Jan Baylor on 9/27/2014 at 7:31 AM



Jan Baylor

Has the Marketing Media list been updated by Kathy?

9/27/2014 at 7:32 AM

[comment](#)



Ken Gray

The Media list is up to date.

9/27/2014 at 7:34 AM

[comment](#) | [delete](#)



Have question? Contact your Account Manager or call
reviewsnap™ at 1-800-516-5849



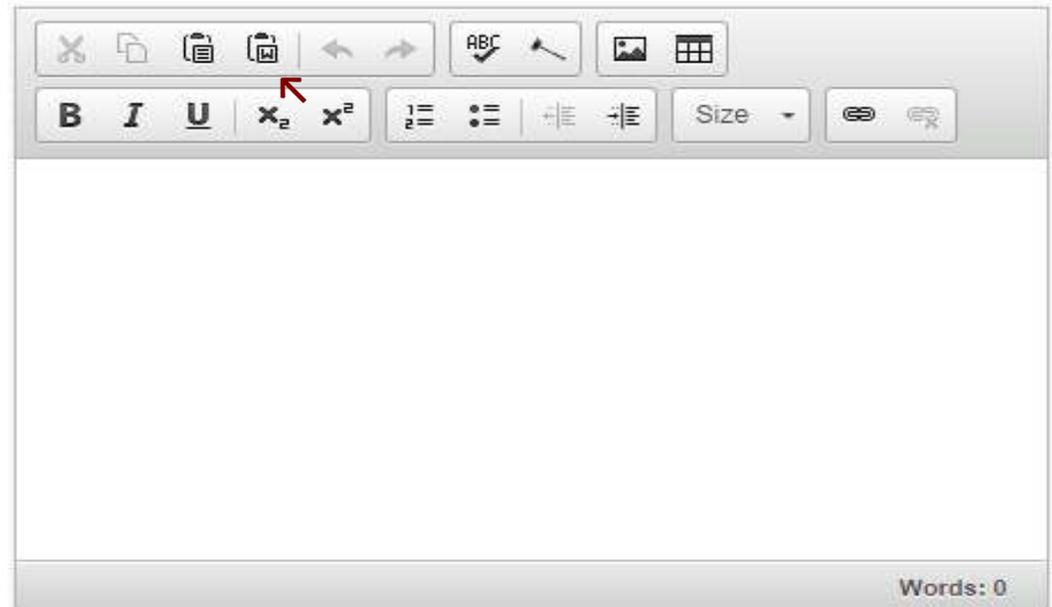
reviewsnap™ Tools

Tools

Editor Comment Box

Throughout the **reviewsnap™** system, the Editor/Comment box appears in many sections. Content from other documents can be copied and pasted into the box

Note: When copying from a Word document, use the 'Paste' icon with a 'W' on it.



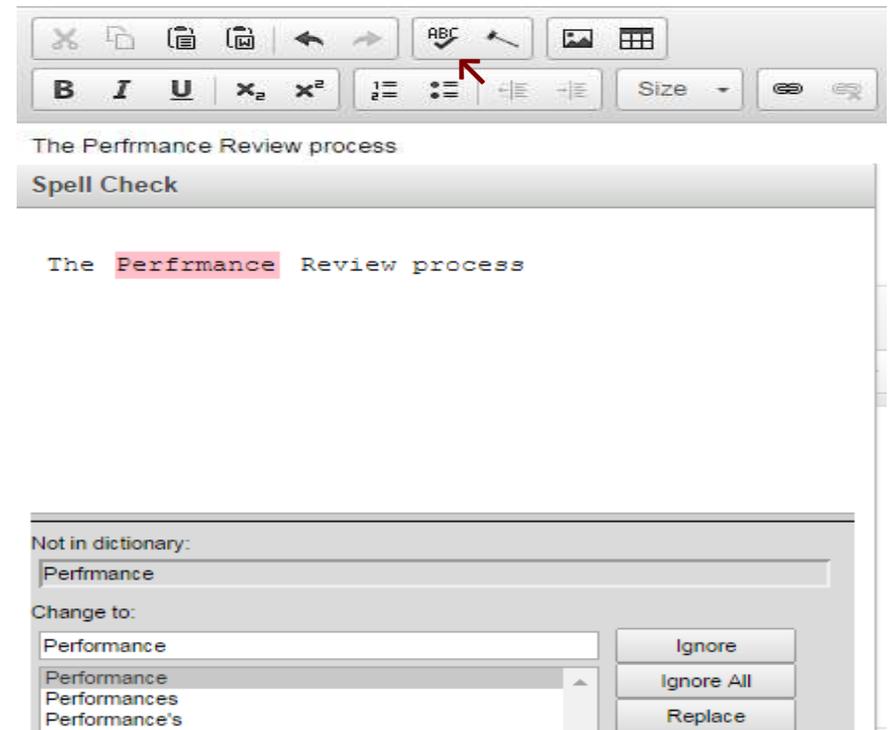


reviewsnap™ Tools

Tools

Editor Comment Box

The **Spell Check** tool is available in all comment boxes



Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



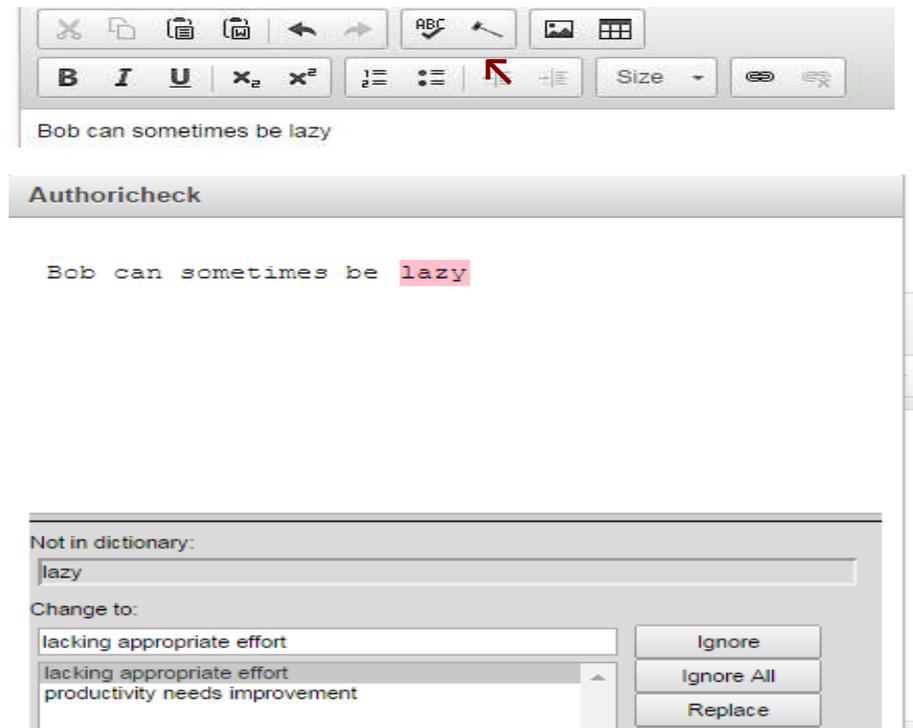
reviewsnap™ Tools

Tools

Editor Comment Box

AuthoriCheck is available in all comment boxes. It checks for possible discriminatory or derogatory language and suggests alternatives.

Note: When Autorun AuthoriCheck on Review Step submit is checked in the Manage Company Information Review settings, AuthoriCheck and Spell Check are automatically run during the review process when reviewer clicks NEXT on the review.



Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849



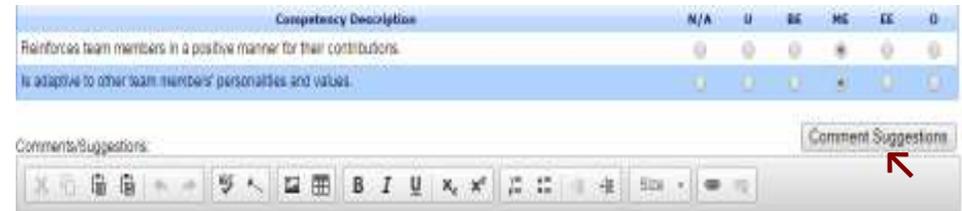
reviewsnap™ Tools

Tools

Comment Suggestions:

The Comment Suggestions tool can be made available in the competency evaluation section of a review form. If enabled, it provides potential feedback language for insertion into the comment fields.

Note: This feature needs to be checked in the Manage Company Information, Review settings.



Comment/Suggestion Helpful Phrases

- [He/She] is divisive and seems to cause problems among other members of the team. [He/She] falls well below expectations related to teamwork.
- [He/She] is the consummate team player and consistently demonstrates [his/her] desire to be part of an effective team.
- [insert name] encourages and engages in cooperative and participative behavior.
- [insert name] is generally a good team player and exhibits behavior consistent with sound teamwork.
- [insert name] struggles with being a team player and seems to want to "do it [his/her] way" rather than seek input and suggestions.

Have question? Contact your Account Manager or call reviewsnap™ at 1-800-516-5849