



Review Process Summary

Review Process Steps

1. Login and click on Manage Employees. If you are an employee you will click on Manage Reviews
2. Select the necessary employee from the drop down box. Select yourself from the drop down box if you are doing a self-review.
3. Before beginning the review make sure the employee's goals are in the Manage Goals section for that current year. If not, make sure to add the goals prior to beginning the review
4. Click on Create or Complete a Review in the actions box
5. Select the correct review period to do the review for and click Next
6. Select the necessary template to rate the employee and click Next
7. Before clicking Continue to begin the review look over the information above the buttons to make sure the correct employee, review period and template have been selected. If so, click Continue to begin the review.
8. Start by rating the employee on each individual competency. Once rating all competencies for that competency group, leave your comments for that competency group
9. After rating the employee for each competency group, rate them on their current years goals in section 2 of the review called Review of Progress in Meeting Goals. Then leave your comments for their goals.
10. In section 3 of the review, List of Upcoming Years Goals, you will add next year's goals into the system. **If you add next years goals in at this time the goals will automatically populate into the Manage Goals section and rollover to next years review. If you aren't ready to add the goals in for next year just yet, add the goals in through the Manage Goals section in prior to doing next years review so they can be rated on that review.**
11. In Section 4 of the review you will leave your overall comments and enter the employee's development plan.
12. After completing the review you can either click on the button that says "Click Here to save this review and exit" or click on the button that says "Click Here to mark this review ready for signatures. **If you have face-to-face meetings before signing off on the review make sure to click on the "Click Here to save this review and exit" button. After having your face-to-face meeting you can then come back in and mark the review ready for signatures. If you do not have face-to-face meetings click on the "Click Here to mark this review ready for signatures" button.**
13. After marking the review ready for signatures you will need to check the box next the statement that says "Require Employees Signature". **This option requires them to sign-off using the eSignature. If employees do not have access to the system than leave that box unchecked and they will sign-off on a hard copy.**

14. Before clicking Submit make sure to check the boxes next to the multiple level manager's names if they are required to sign-off on the reviews. If they are not required to sign-off leave those boxes unchecked and click Submit.
15. Next, you will come to the page where you will see buttons that say "View", "Comments", "Signatures", "Continue" and "Delete". **To look over the review click on the View button. To see an employees comments on the review click Comments. To sign-off on the review click on the Signatures button. To make changes to the review click on the Continue button.**
16. During the sign-off process the manager and HR will sign-off first and they will both need to sign-off before the employee and can see the review on the system and be able to sign-off.
17. If the manager makes any changes to review after people have signed-off their signatures will be wiped out and they will need to re-sign the review to make sure everyone is signing-off on the same document.
18. Once the employee has signed-off and all signatures have been gathered a button that says Finalize will show up in the Create or Complete a Review page and the manager will receive an email notification letting him/her know that they can now finalize the review. After all changes have been made to review and you are ready finalize it go into the Create or Complete a Review page and click on the Finalize button.
19. After reviews have been finalized you will see a View Completed Reviews link show up under that employees name in the Manage Employees page and you can view any past reviews that have been finalized.

