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Reference Guide

Performance Reviews/Appraisals and 360 Degree Surveys

The ReviewSnap™ performance management system is a complete Web-based on-demand system that requires no downloading of additional software to your computer. You will access and manage your organization's performance reviews/appraisals and 360 degree feedback surveys simply by logging in from any computer that has access to the Internet. There is no software to load on your own computer(s).

This guide is intended to assist you in using the system. The system is very easy to use and administer. However, if you have any questions while using the system or questions that may not be addressed in this guide, please do not hesitate to call us toll-free at 1-800-516-5849.

PERFORMANCE REVIEWS

Getting Started

As you use the system, remember that you will manage the performance review process largely from the left navigation area of each page. Depending on the permissions of the user, this left navigation area will display the links they have access to within the system. System administrators will generally see all system management links while others will generally see fewer links.

The steps necessary to set up your organization in the system are easy to complete. There are several basic steps that need to be completed to begin conducting performance reviews/appraisals:

Company/Organization Information - When you became a subscriber to the ReviewSnap™ system, you provided some basic information about your organization. Making sure that all of the pertinent information about your company has been entered is the first step in initial setup. Once you have logged into the system, click on the last link in the left navigation area from any page called "Manage Company Information".

On this page, you can update the basic information about your organization at any time. Also, it is on this page that you will designate whether you wish to use a weighted goals process when conducting your reviews. Some organizations choose to weight goals/projects for employees in terms of perceived importance while many others choose not to use a weighting system. If you want to be able to enter weights for each goal for your employees, you will need to check the box next to "Use Weighted Goals". If you check this box, the weighting will be in place for all employees. If this is selected, a manager will need to enter a weight based on a percentage of 100. If they choose to weight them equally, they will simply enter a weight for each goal so that each is equal in importance and they add to 100%.

You can update company information at any time. If there is a change in address, telephone number, website address, or if you choose to use weighting or remove weighting for goals, you may do that at any time as well. The weighting will only apply to any reviews conducted after the date and time you check the box, however.

Setting up Departments/Divisions - Most organizations have departments or divisions to which they want to associate employees. Still others do not. If you want to tie your employees to a department/division, you will need to add departments/divisions using the first link in the navigation area on the left side of the page called "Manage Departments".

This is simply a process of naming your departments (if you prefer to use divisions, enter those names rather than departments). After you have clicked on the "Manage Departments" link, you will be taken to a page that is headed "Create a Department". Simply enter the name of the department or division and click on either the "Create" button or the "Create and Add New Department" button. Using the "Create" button will take you back to the "Manage Departments" page while using the "Create and Add New Department" button will allow you to continue adding departments repeatedly.

Also, departments may be added using the employee import feature of the system discussed below under "Adding Employees Using the Import Feature".

Remember that departments are not required, but they are recommended strongly if your organization has multiple departments or divisions that you want to associate employees with.

Job Titles/Descriptions - Each employee must be linked to a specific job title/job description. This allows the system flexibility with respect to assigning review templates (forms) to specific jobs if desired and it helps in the association of employees to managers (to be discussed later).

To create job descriptions, click on the link in the left side navigation area called “Manage Job Descriptions”. Once you have clicked on this link, you will arrive at a page with the heading “Manage Job Descriptions”. Click on the link below with the header named “Create a Job Description”. You will be taken to a page with two boxes. One is labeled “Job Description Title” and the other is labeled “Job Description Text”. A job title is required, but the text is not.

You may initially enter all of your job description titles and come back in later if you so desire to add the actual descriptions. This will depend on whether you want the system to store all of your actual job descriptions. Keep in mind that you can both store and print job descriptions using this function.

The job titles (not the descriptions) may be added through the employee import feature as well. See the section titled “Adding Employees Using the Import Feature” below for more information.

The actual description may be typed in or it can be added copied from an existing document and pasted into the description area. And you also have the option of attaching the document as a file from your computer.

You will notice that you can click on “Create” to add a single job description or “Create and Add New Description” to save the description just entered and then add another description/title. How you use this will depend on how many job descriptions you will be adding in any given session.

Manage Cascading Goals – The Manage Cascading Goals section allows you to add goals that apply everyone within the company, a department or job description all at once. This keeps you from having to enter the same goal individually for everyone that it applies to. In the Manage Cascading Goals section you also have the option of importing goals on an individual, department and job description level. When doing the import you will need to fill out the necessary information on the CSV template. Please note that out of the email, department and job description columns ONLY one of them needs to be filled out depending who the goal applies to.

Employee Roles and Permissions - You will notice a link in the left navigation area named “Manage Employee Roles”. This functionality is needed in order to assign the specific permissions that each employee will have within the system. The system uses default settings for three levels of employee; 1) the system administrator(s), 2) managers who will be rating employees, and 3) all other employees.

The site administrator(s) has default permissions that allow them to manage all functions included in the site. Managers/raters have permissions including the ability to update or add employee information, assign employees to managers, select and save review templates, leave feedback about employees during the

year, create/conduct reviews, and assign roles (site permissions) to employees. The default permissions for all other employees are set to none.

You can change the default settings for any of these three levels of employee simply by clicking on the “Update” action next to the role name you wish to change permissions for. When you click on the “Update” action, a page will appear that shows the role name and a list of permissions available. If you want to remove permissions, simply click on the box that is checked. If you want to add permissions, click on any applicable box that is not checked. In both cases, once you have selected the appropriate permissions, click on the “Update” button below the permissions list and that role name will be updated with your changes.

Employees can be given the option to do self-evaluations by checking the “Create Reviews” permission in the Employee role.

To allow employees to sign off on reviews using the eSignature feature, check the “Sign Off Reviews” permission in all of the roles.

You can create new role names as well with new permissions if you feel that is necessary. To create a new role, click on the “Add a Role” link. You will be taken to a page that will allow you to name the role and select the permissions. Remember to click the “Update” button once you have completed the setup of the new role.

The last four permissions listed; Sign-Off on Reviews, Review Email Notifications, Delete Reviews, and Create Reviews for all Employees are meant only for the Administrator role.

Sign-Off on Reviews permission: If the eSignature function is being used, employees and managers will have the ability to sign-off on their reviews. This permission is only meant for the Administrator or an individual who needs to sign off on ALL reviews within the company. So, you will want to make sure that the Manager and Employee roles do NOT have this permission

Review Email Notifications: Managers and Employees will receive notifications for upcoming reviews 30 day and 10 days before the review is due as well as 2 days and 5 days after past due reviews. This permission indicates that that the Administrator will receive notifications every time a review has been completed within the system. This is to help them keep track of who has and has not completed reviews within their organization.

Delete Reviews: Some organizations provide their Managers this permission allowing them to delete reviews. The majority of companies give this permission only to their Administrators. If a Manager starts a review for the wrong review period or uses the wrong template, the review can be deleted once it is finalized by the manager which allows them to start over.

Create Reviews for all Employees: This permission can be given to executives of organizations who need to conduct reviews on all of their employees or an Administrator who also needs to conduct reviews on all of their employees.

Choosing/Creating Rating Scales – Every good performance review system utilizes reliable and valid rating scales that are descriptive and consistent. The rating scales are an integral part of the review forms. ReviewSnap™ provides four standard five point rating scales that you can choose from if you will be creating a custom review template/form. The standard scales are time tested and validated.

If you wish to create your own rating scale(s), you can easily and quickly do so in the ReviewSnap™ system. You can also use the “Duplicate” feature to copy the standard scales and modify them to meet your specific needs. The system will allow scales ranging from one point to ten points. Research and experience indicate that five point scales are best suited to the performance review/appraisal process, but there is no hard and fast rule about the number of rating points that should be used.

To create, modify, duplicate or view rating scales, click on the “Manage Rating Scales” link in the left navigation area from any page. You will be taken to a page that lists the four predefined rating scales that are available for your use. If you want to examine any of the scales, simply click “View” and a window will open displaying the value, name and abbreviation for each scale point. Here is an example:

Global Scale 1

0 - Not Observed (NO)

Employee too new to firm or not applicable to employee.

1 - Far Below Standards (FBS)

Performance clearly does not meet expectations – corrective action necessary.

2 - Below Standards (BS)

Performance does not consistently meet expectations.

3 - Meets Standards (MS)

Performance meets expectations consistently.

4 - Exceeds Standards (ES)

Performance often exceeds expectations.

5 - Far Above Standards (FAS)

Performance significantly above expectations.

Remember that any of the standard scales offered in the system can be modified to meet your specific needs by clicking on “Duplicate”. You will be asked to name

the scale for reference purposes. Once named, you can then modify anything on the scale by clicking on “Update”. Simply change anything you desire and then click on the “Update” button.

If you want to create a rating scale from scratch, click the “Create a Rating Scale” link at the top of the “Manage Rating Scales” page. A form will open allowing you to input the pertinent information. You may name each scale point whatever you would like and you may use any abbreviation you desire. We recommend a two letter abbreviation and no more than a three letter abbreviation. The abbreviations are required because they appear in a scale header above the competency check boxes in the actual review forms.

Remember that you will need to use a five point scale. However, there are always 6 rating scale points included in the scales because we must allow for situations where the behavior is not observed or the competency does not pertain to a particular employee. Therefore, a value of “0” is always included in each scale to accommodate those situations. Most performance review forms use either “Not Applicable” or “Not Observed”, but you can use whatever term makes sense in your environment.

Adding Employees – The ReviewSnap™ system is employee-specific meaning that all feedback, reviews, and other relevant performance information is tied directly to an employee. In order for the system to operate properly, each employee that will be reviewed must be added into the system. Also, those who will be responsible for conducting reviews within the system must be identified.

This step is initiated by clicking on the “Manage Employees” link in the left navigation area of any page once you are logged in to your account. After clicking on this link, you will be taken to a page that shows a link labeled “Add and Employee”. To begin adding employees to the system, click that link.

An email address must be added for all employees. In many cases, the email address is not used by the system. It is used to notify managers of upcoming reviews that are due, however. Be certain to check the “Send email to user with login information” box directly below the email address box on the form if you want the employee to have access to the ReviewSnap™ system. This ensures that the employee will receive an email notifying them that they have been added as a user of the system and it will provide them with their username and password.

If an employee will not be allowed access to the system and they do not have a valid email address, you may add a fictitious address to fulfill the system requirement of adding an email address. We recommend adding actual email addresses for each employee, but if you use fictitious addresses for any employees, we recommend using something like test1@yourcompanyname.com,

test2@yourcompanyname.com, etc. Again, we strongly recommend using actual email addresses for all employees whenever they are available.

Continue adding the appropriate employee information in each of the boxes on the form. Each employee must have a manager assigned to them in order to be reviewed. Immediately below the form, there is a section labeled “Manager(s)”. By clicking on the link “Add a Manager”, a window will open where you can type in all or part of a name to bring up anyone who has been designated as a manager in the system.

Or simply click on the “Find” button and a list of managers will be displayed in the window. Simply click “Assign” next to the employee’s manager. You can add more than one manager in any instance where an employee reports to more than one person. This will allow each manager to complete a review on a particular employee.

The section below the “Manager(s)” section is labeled “User Roles”. This section does two things; 1) it assigns the role, if any, the employee will play as a user of the ReviewSnap™ system and associates the permissions assigned to that role to the employee and 2) it allows you to designate who is a manager. If an employee will be reviewing other employees, they must be designated as a manager in this section or be given the permissions to do so in a custom created role.

Continue adding employees in this manner until you have entered all employees who will be reviewed or will be reviewing others.

Another option for adding employees to the system is to use the employee import feature described below in the “Adding Employees Using the Import Feature” section of this guide.

Defining Review Periods – Most organizations use the employees’ hire date as the review date. The ReviewSnap™ system allows the user to define exactly what period of time they wish to use in reviewing employees.

Click on the link “Manage Review Periods” in the left navigation area of any page once you are logged in to define your review periods. You will be taken to a page that lists two choices; 1) “Use Anniversary Date Reviews” and 2) “Use Custom Review Dates”.

If anniversary date review periods are selected as the review period, the hire date entered when adding employees will be used to identify each review period. The system will assume a 12 month review period running from hire date to hire date in the current year. For example, if the hire date is 08/01/2000 and it is now approaching 08/01/2008, the system will recognize that and will notify the

manager(s) that a review is due. The review period used by the system will be 08/01/2007 through 07/31/2008.

If custom review dates is selected, the system will allow you to create one or more review periods in any way you wish to define them. You can define multiple custom review periods if you want to do reviews based on calendar year as well as semi-annual reviews based on calendar year, for example.

You also have the option of assigning a custom review period to a specific employee or to all employees when you create a review period.

Creating/Selecting Review Templates (Forms) - In order to use the ReviewSnap™ system, the review template (form) that you wish to use will be selected each time an employee is reviewed. The system offers two standard forms that can be used as is. Both are validated forms that have been in use in various organizations and work well.

However, the ReviewSnap™ system is very flexible and it will allow you to modify the standard forms to meet your specific needs or to create customized templates (forms) from scratch. The system offers more than 350 validated competencies (performance factors) for you to choose from if you want to select from the competency library. Or you can add your own competencies as you deem appropriate.

You will notice the term “Competency Group” used in the system. These represent nothing more than a way to categorize the competencies into logical groups so that they appear on the review template (form) in a way that communicates to the employee what is being measured. The actual competencies that the employee will be rated on will be listed under each Competency Group heading on the template (form).

Another feature of the ReviewSnap™ system is the ability to tie a review template to a specific department or a specific job. While many or even most organizations use a single review form across all departments and employees, some choose to add or delete competencies from forms depending on the work being done. The system allows you to do this in a very easy manner.

To select or create a review template, click on “Manage Review Templates” in the left navigation area of any page once you are logged into the system. If you are creating a new template, you will be taken to a page that shows the two standard ReviewSnap™ templates available for your use. Click on “View” if you are interested in possibly using one of these templates. A window will open displaying the form. Here you can view the competencies being measured for each form.

If you want to use one of the standard templates across your organization for all employees, there is no need to do anything else in terms of managing review templates. When a reviewer pulls up an employee to review them, they will simply select the review form template you have chosen to use. They will just need to know which form you want them to use.

However, if you like the basic things being measured on one or both of the standard templates, but would like to change the scale or want to add or remove certain competencies, simply click on the “Duplicate” link next to the template you want to modify. Once you have clicked on the link, you will be taken to a page that will ask you to name your new template. Choose any name you believe is appropriate for the template and enter it in the “Template Name” field.

Next, you will select the rating scale that will be used to rate the competencies. Below that you will see an option of using the same rating scale for the goals, however you are able to select a separate rating scale or no rating scale by selecting None in the drop down box.

At this point, if you want to make the template specific to a department or to particular jobs, click the relevant boxes in the “Department Specific” or “Job Description Specific” sections. Doing so will tie the template to the department(s) or job(s) selected.

Click the “Create” button to complete the process of defining the template settings.

You will now have created a new template and will be taken back to the page named “Manage Templates”. Look down the list of templates and you will see the name of the template you created. To add or delete competencies to the template, click on the “Update Competencies” link next to the template name.

You will now be on a page named “Manage Competency Groups/Competencies”. Look down the page and note that there is a list of competency groups that are currently included in the template. If you want to retain the groups, but add or delete competencies from any of the competency groups, click on the “Update Competencies” link next to the group you want to make changes to.

At the top of the page you have linked to will be the heading “Manage Competency Group: XXXXXX” (XXXXXX represents the actual name of the competency group you have chosen to update). Under the heading, you will see a section labeled “Currently Added Competencies”. The competencies currently on the form you have chosen to modify will appear. There are check boxes next to each. If you want to remove any of the competencies, simply click inside the box and then click on the “Remove” button.

To add competencies to this competency group, you can either add new custom competencies that you define or you can select from the ReviewSnap™ competency library at the bottom of the page. If you want to do both, we recommend adding your custom competencies first and then selecting from the library.

If you want to add custom competencies to the group, click on “Add a New Custom Competency” at the top of the page. You will be taken to a page with a heading “Create a Competency: XXXXXX” (XXXXXX represents the competency group name to which you are adding competencies). Simply type in your competency in the box labeled “Competency Text:”. Once you have entered your new competency, click on the “Create” button if you will be adding only the one competency or click on “Create and Add Custom Competency” if you will be adding more custom competencies.

Once you click on “Create”, you will be taken back to the “Manage Competency Group: XXXXXX” page. Here you will see your new custom competencies that have been added to the competency group. If you want to add competencies from the ReviewSnap™ competency library to the group, you may do so by clicking on any of the competency group headings. Doing so will open up a list of competencies which you may view and select if you so desire. Simply check the box next to any competency you want to add to the competency group you are working with. Once you have selected competencies from the library, scroll to the bottom of the page and click the “Add” button. Doing so will place the selected competency or competencies into the group.

Once you have finished adding or deleting competencies to a particular competency group, click on “Back to Manage Competency Groups” and you will be taken back to the “Manage Competency Groups/Competencies” page.

If you want to add more competency groups and associated competencies to your template, click on either the “Add Predefined Competencies” or the “Add a Custom Competency Group” link at the top of the page. If you click on “Add Predefined Competencies”, you will be taken to the ReviewSnap™ competency library. As above, simply click on any competency group to open a list of competencies from which you may select. This will create a competency group with associated competencies that will now appear on your template/form.

If you click on “Add a Custom Competency Group”, you will be taken to the page where you will name your competency group. Once you have typed in the name you wish to give to your competency group, click “Create” and you will be taken to the “Manage Competency Group: XXXXXX” (XXXXXX represents the name you have given to your competency group.) On this page you will be able to add custom competencies and/or select them from the ReviewSnap™ competency library as discussed above.

Repeat this process as many times as needed to complete your template.

Weighting Competency Groups:

ReviewSNAP allows the weighting of competency groups within a review template. To allow weighting, go to Manage Company Information and check the box next to “Use Weighted Competency Groups”. Once selected, all of your review templates will require weighted competencies. Keep in mind that the sum of the competency group weights must equal 100%. If they do not equal 100%, the weighting will not be invoked in the review process.

Open-Ended Questions:

The ReviewSNAP system also provides the ability to use open-ended questions in your review template. They are referred to as “non-ratable” questions in the system. To add open-ended questions, follow the process for adding custom competencies and select “Non-ratable Competencies”.

THE JOURNAL ENTRIES FEATURE

The ReviewSnap™ system is designed to provide a complete performance review/appraisal solution. One of the key things that must be a part of any good performance management system is the ability to document both positive and negative performance events throughout any given review period.

ReviewSnap™ provides an excellent feature for creating and storing journal entries about employees' performance at any time. It allows the user to create journal entries at their discretion so that they may refer back to them as needed or print them when they are completing a review on an employee. It is also an excellent mechanism for documenting performance issues in a progressive discipline situation with an employee.

The ReviewSnap™ system can be set up to allow any employee to create journal entries about employees. However, most organizations set up the system to allow only managers (and the system administrator(s)) to create journal entries. The default system permissions include this privilege for both managers and the system administrator(s).

Any time a manager wants to add a journal entry about an employee, he/she will simply click on “Manage Employees” in the left navigation panel from any page after logging in to the system. On the Manage Employees page, the manager will select the employee for which he/she wants to add the journal entry.

The employee information and allowed actions will be displayed. Click on the “Create/View Journal Entries” link in the Actions section. Doing so will take the user to a page headed “Employee’s Name: Journal Entry”. Click on the “Create

a New Journal Entry” link and a new page will appear which will allow the user to enter the feedback. Click on the “Create” button once the entry has been made.

If you have documents such as disciplinary documentation, employee file notes or others that you want to store within the ReviewSNAP system it can be easily accomplished. To begin the process, click on “Create a New Journal Entry” and then on “Browse”. Once you locate the file, click the “Create” button and the document will be uploaded.

To view entries at any time, click on “Create Journal Entry” in the actions section and entries will be listed by date entered. Click on “View” and the entry will be displayed. Also, all feedback for a given review period can be printed by clicking on the “Print Feedback” link.

Writing a Performance Review

The process of completing the performance review template/form is quick and easy. All performance reviews will be created for an employee from the Actions section of the Manage Employees page. To get there, click on “Manage Employees” in the left navigation area of any page after logging in to the system. The Manage Employees page will then allow the user to select the employee being reviewed from the dropdown box. Only employees assigned to the manager will be available to that manager.

Once the employee has been selected and the “Go” button has been clicked, the employee’s information and the “Actions” panel will appear. To write a review, click on the “Create or Complete a Review” link in the “Actions” panel. The “complete” part of this link is used when a review has not yet been finalized and it allows the reviewer to go back into a review and make changes. It is common for managers/reviewers to think about a rating or a comment they made on a review and decide after the fact that they want to make a change. This feature allows the change to be made up until the point that the review is finalized.

After clicking on the “Create or Complete a Review” link, the “Create a New Review” page will appear. On this page, the manager/reviewer will select the review period for which the review will be written. If “anniversary date reviews” are being used on a company-wide basis, that is the only option that will appear in the drop down box and the user will simply click “Continue” at that point.

However, if custom review periods have been created and one of those is to be used for the review in question, the manager/reviewer will want to select the appropriate review period from the drop down list and then click “Continue”. Once “Continue” is clicked, the “Select a Template” page will open. A list of review templates will appear in the drop down list. If no custom templates have been created, only the two standard ReviewSnap™ templates/forms will be listed. Note: All managers/reviewers will need to know which template/form they should

be using to review their employees. Select the appropriate template name and click “Continue”.

A page headed “Review Your Selections” will open at this point. This gives the manager/reviewer the opportunity to verify the employee’s name, the review period being used and the template name being used. Also, it provides them with the opportunity to print a blank form if they wish to do so. After verifying the information and printing the form, if desired, click “Continue”.

At this point the actual review form will begin being displaying. It is displayed in sections with the first section addressing the specific ratings of the employee’s performance against the competencies that you have selected to use.

This section of the form is displayed one competency group at a time with the name of the competency group shown at the top of each page, the rating scale legend appearing just under the group name (for reference purposes since the rating scale uses abbreviations in the interest of saving space on the form), the list of competencies being rated for that group, and finally a “Comments/Suggestions” box for entering comments about the ratings given for that particular set of competencies and/or suggestions for the employee. To rate the employee on the particular competency, the user simply clicks the button under the rating they believe describes the performance of the employee relative to that competency.

At the bottom of each page, the user has the option of clicking on the “Continue” button to page to the next section/competency group or on the “Save and Exit” button. Clicking on the “Save and Exit” button provides the opportunity to save the work that has been done up to that point and allows the manager/reviewer to come back into the review later to change or complete it.

Once the ratings for each competency group have been completed, the system will take the user to a section on goals. If the employee has had a prior review and goals were established for the employee, the first thing the user will be asked to do is rate the employee on progress on each goal. If the review is the first one for the employee or no goals have previously been established, the user will be asked to provide a performance plan (establish goals) for the upcoming review period. If the employee has prior goals that are being rated, the system will still prompt the user to enter goals for the upcoming period as well. This ensures that the goals for the employee are always current.

After the goals section has been completed, the user will click “Continue” and will be taken to a page headed “Overall Comments and Development Plan”. On this page, the manager/reviewer can offer any comments on the employee’s performance and type in any sort of plan for employee development for the upcoming review period.

Once completed (not required), the “Continue” button is clicked and the user is shown two choices on a separate page. The two choices are:

“Click here to finalize this review. Once the review is finalized, you will not be able to edit any portion of this review.”

“Click here to save this review and exit.”

Clicking the first option completes the review and closes it from further edits. Click on this choice only if you are certain the review is complete. Clicking the second option allows you to save all work done to that point and come back into the review at your discretion to make changes or finish it.

Employees can leave comments on a review after their manager(s) and, if required, Human Resources personnel have signed off on the review. This feature allows employees to place notes or comments within the review regarding ratings or comments made by the manager.

Once the review has been completed and signed off on by the Manager(s) and the HR personnel (if required) the employee will then have access to login and view the review to sign off. The employees can leave comments on their review on the Create or Complete a Review page.

When an employee leaves comments the manager will automatically receive notifications letting them know that the comments have been entered. The manager can then go into the Create or Complete a Review page for that employee and click on the Comments link and see the employee’s comments.

Employees may also conduct a self-evaluation on themselves. If you want to turn on that option, check the “Create Reviews” for all roles in the “Manage Employee Roles” section of the system. Once that permission has been assigned, all employees will be able to log in as themselves and conduct a self-evaluation. This process is identical to the review process described above except that the employee will select their own name in the employee drop-down box. If you want employees to receive email notifications of a self-evaluation being due, check the “Email Notifications for Self-Evaluations” in the Manage Company Information section of the system. As with the managers, the employee will receive an email notifying them that their self-evaluation is due. They will receive an email 30 days prior to the review due date, 10 days prior to that date and, if they have not completed the review by the due date, they will receive reminder notifications 2 days and 5 days after the due date.

OTHER INFORMATION and FEATURES

eSignatures:

The system allows for eSignatures to allow for a paperless review process. If you will be using eSignatures, be certain to check the box in “Manage Company Information” requiring them.

If you are using the e-Signature function, the review cannot be finalized until all required signatures are on the review. Once all e-Signatures have been processed, the manager will receive a notification that all signatures have been acquired and he/she can now finalize the review. If any changes are made to the review after you have acquired signatures and prior to finalizing the review, the signatures will be wiped out by the system and those who have already signed it will need to resign the review.

Limiting Feedback:

You can limit feedback on employees to the subordinates of managers only. This can be done in the “Manage Company Information” section.

Adding Employees Using the Import Feature:

There are two options for adding employees. It can be done individually or using our new “Import Employees” function.

To import your employees, go to “Manage Employees” and click on the “Import Employees” link. Next click on the zip file link and open the .CSV file and enter the necessary information. Save the .CSV to your desktop or a file, then click Browse to find your file then click Upload. Instructions are available in the “Import Employees” section.

Important: Be sure the import file is closed on your computer. Having the file open can interfere with a successful import. If you have attempted to import the file and it fails due to the file being open, close the file and try again. If it fails again, restart computer and try to import the file again. Also, do not add additional fields (columns) to the .CSV file import template. Doing so will likely prevent the import from being successful.

Other Performance Review Features:

- In “Manage Review Templates”, you can choose a second option for the order in which the items will appear in the final review form. The review is performed in the same order as option 1, but if you choose option 2, the order will now look like this on the review when finalized:

Goals
Overall Comments and Development Plan
Review of Progress in Meeting Goals
Performance Ratings (competency ratings)

- A review “footer” is offered that will appear at the bottom of the performance ratings section. This can be used as a note to all employees regarding the review process, an explanation of company wide rating scales for compensation, or any other notes you may want to convey to reviewers and employees.
- The system offers a Comment Suggestion function that allows reviewers to view possible comments to support ratings for any particular competency group. While completing a review, each competency group section has a “Comments Suggestion” button that will bring up a list of comments that can be selected from to insert into the comments section. Once selected and inserted, they can be modified as well.
- ReviewSNAP offers an optional Compensation Recommendation Feature - Go into “Manage Company Information” and you will see a “View Compensation Recommendations” link. Click on that link. Then you can set up your own compensation recommendations, if you so choose, by overall performance rating. Only reviewers/managers will be able to view this information in the development plan section of the review.
- Also, you can now leave feedback on yourself to help with goal tracking and reporting on where you stand relative to your goals.

360 DEGREE FEEDBACK SURVEYS

Conducting 360 degree feedback on an individual is a matter of selecting or creating your survey templates and selecting those individuals who will be providing feedback on the “target” employee.

If you are using the 360 degree feedback solution in conjunction with the performance review module, most or all of your basic setup of company and employee information will already be done. If you are using only the 360 degree feedback portion of the system, you will need to set up this information. Please proceed to the beginning of this guide to begin the company and employee setup process and complete that prior to following the steps below to utilize the 360 degree feedback module.

Steps to Setting up a 360 Degree Survey

- You can begin by setting up your Rating Scales in the “Manage Rating Scales” by clicking on “Create Rating Scale”. There is one standard global rating scale for 360 degree feedback surveys that you can review and use if you so choose. Or you can modify this standard scale or create your own customized scale(s). These

scales represent the range of possible ratings that raters will select from for each competency the target employee will be rated on.

- Next, you can create your customized survey templates in the “Manage Review Templates” section by clicking on “Create a 360 Degree Survey Template.” There are two standard templates you can choose from when you begin building a survey. Or you can modify these standard templates or create a completely customized template (more than one if desired). You will notice that there is a competency library from which you may choose competencies. Or you can use your own custom competencies. And you have the choice of selecting from the library as well as adding your own custom competencies. The system is very flexible and will allow virtually any combination.
- After creating/selecting your rating scales and templates, you can begin setting up 360 degree surveys for the “target” employees to be rated by going to “Manage Employees” and clicking on the employee drop down box. Select the employee for whom you want to create a 360 feedback survey.
- Next, click on “Manage 360 Degree Surveys” on the right side of the employee screen. Then click on “Create 360 Degree Survey” where you will assign the survey a target end date, select the template that applies to this survey, and select whether the employee will be reviewing him/herself.
- Then go back to the “Manage 360 Degree Surveys” page and click on the “Raters” link to select those who will be completing the survey.
- After selecting your raters click on “360 Degree Surveys” in the left navigation panel of the page. To begin the survey, click on “Start” next to the “target” employee’s name.
- As an administrator, once all of the raters have completed the survey go to “Manage Employees” and then click on “Manage 360 Degree Surveys”. There you will need to click on “Finalize” which will close out the survey.
- Now you will be able to see a final summary report. To see the final summary report, go to “Manage 360 Degree Surveys” for the specific employee. There you will now see a completed survey list and click on “View” to see the summarized report aggregating (averaging) all raters’ ratings and comments.

Now you can also view summary and detail statistics by clicking on Company Statistics in the left navigation panel. Select your date range and the type of report you wish to view and click “Submit”.

Remember that if you have any questions at any time, please don’t hesitate to contact us either by email at info@reviewsnap.com or by calling us toll-free at 1-800-516-5849.
