

Reviewsnap Manager Guide

Taking a Note on an Employee


Step 1: Locate the Employee you Want to Take Notes On

Once you locate the employee from your list of Direct Reports, click on **Notes**.



Step 2: Input your Note

Enter your note text and select a privacy setting to determine if the note is visible to the employee or not. You also have the option to associate the note to a specific element from the review document, if one is not selected the note is categorized under General Notes. Make sure to select **Add this Note** to save.



Add a Goal to an Employee's Review

Step 1: Choose the Employee You Want to Add a Goal For



Rosie Robot
Notes • Profile



Robo-Accountant
1/1/2018 - 8/31/2019



Evaluating on
8/1/2019

Approval

Complete by
8/31/2019

Step 2: Click Add a Goal

Review for Rosie Robot

Position Description
Position Household Robot description

Add a goal

Step 3: Add an Existing Goal, or Create a New One

Enter the name of the goal and a description if desired. **Save Goal** when done.

Step 4: Confirm the Location of the Goal

Click **Insert Goal**.

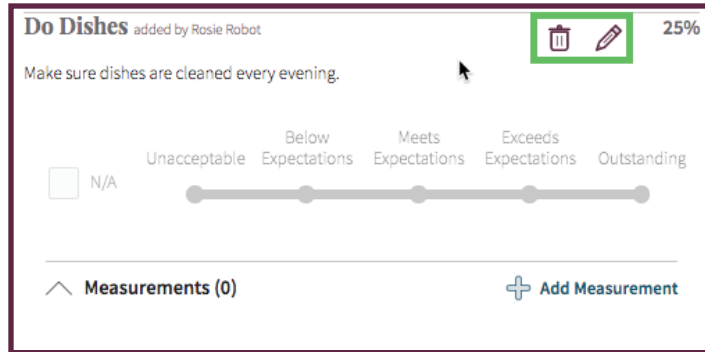
PLEASE NOTE

NOW, YOUR NEW GOAL SHOWS UP AS A LINE ITEM THAT WILL BE RATED AND COMMENTED ON DURING YOUR EMPLOYEE'S

Edit or Remove a Goal

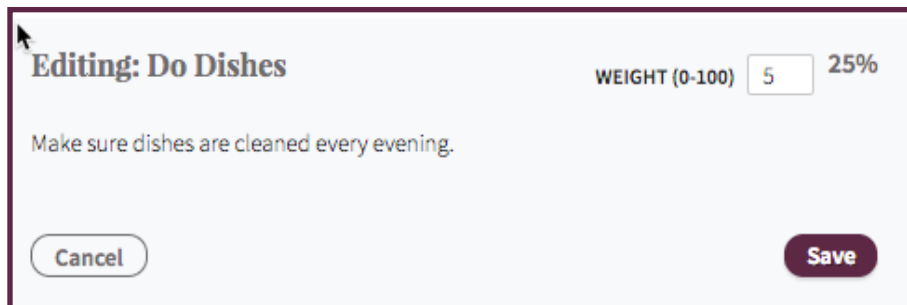
Step 1: Hover over the goal

The **Trash Can** will remove the goal. The **Edit Pencil** will allow you to make changes.



Step 2: Editing your Goal

If **Edit** is selected, the content of the goal can be edited and the weight of the goal can be adjusted. Adjusting the weight of the goal will effect the weights of the other goals on the review.



PLEASE NOTE

Only the author of the Goal has the ability to Edit that Goal. If the employee added a specific Goal, they will need to edit that Goal if

Add Measurements to an Review

Step 1: Locate the Employee Who You Want to Add a Measurement

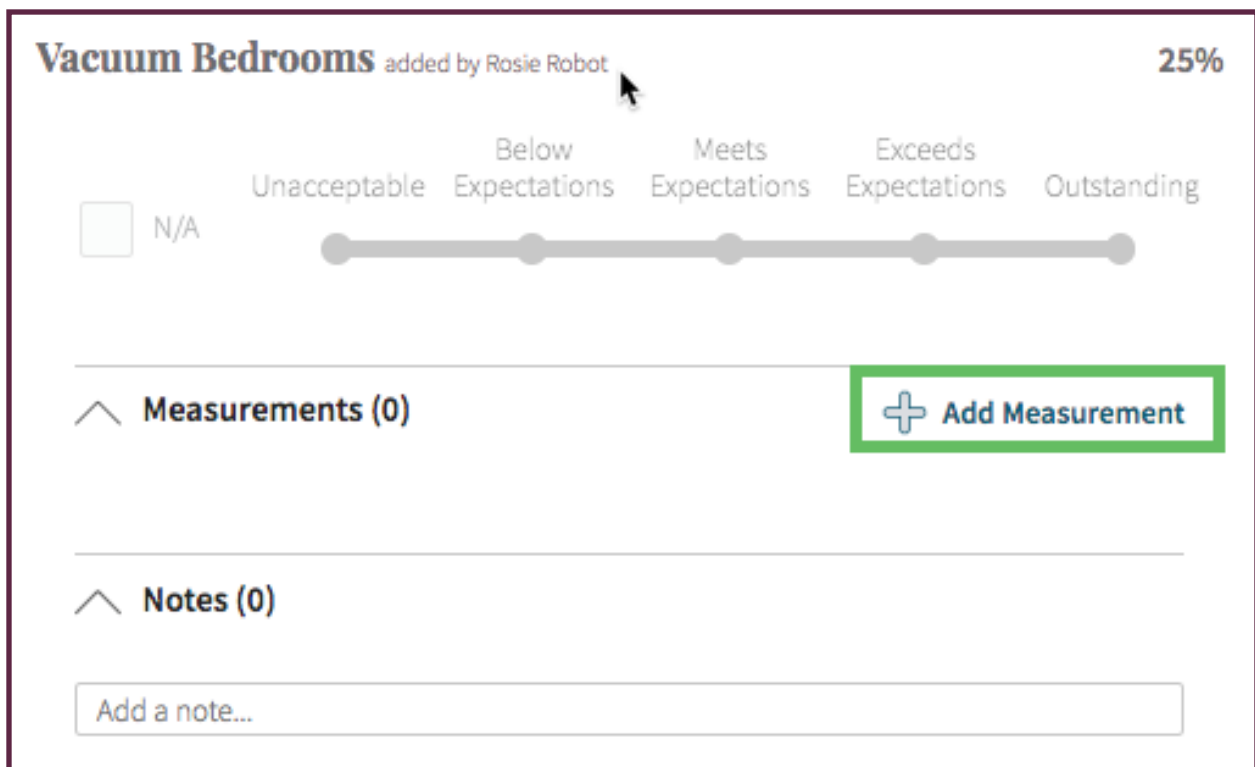
If the Employee's Review is in the Evaluating Phase, this progress bar will say "Evaluate Review". You will need to click "**Manage Goals and Notes**" on the next page to add measurements to your Employee's review.



The screenshot shows the header for an employee's review. On the left is a profile card for "Rosie Robot" with a robot icon and links for "Notes" and "Profile". To the right is a document icon labeled "Household Robot" with the dates "3/1/2018 - 6/29/2018". On the far right is a progress bar with four stages: "Set Goals" (completed), "Evaluating on 5/30/2018" (current), "Approval", and "Complete by 6/29/2018".

Step 2: Decide Where You Want to Add the Measurement

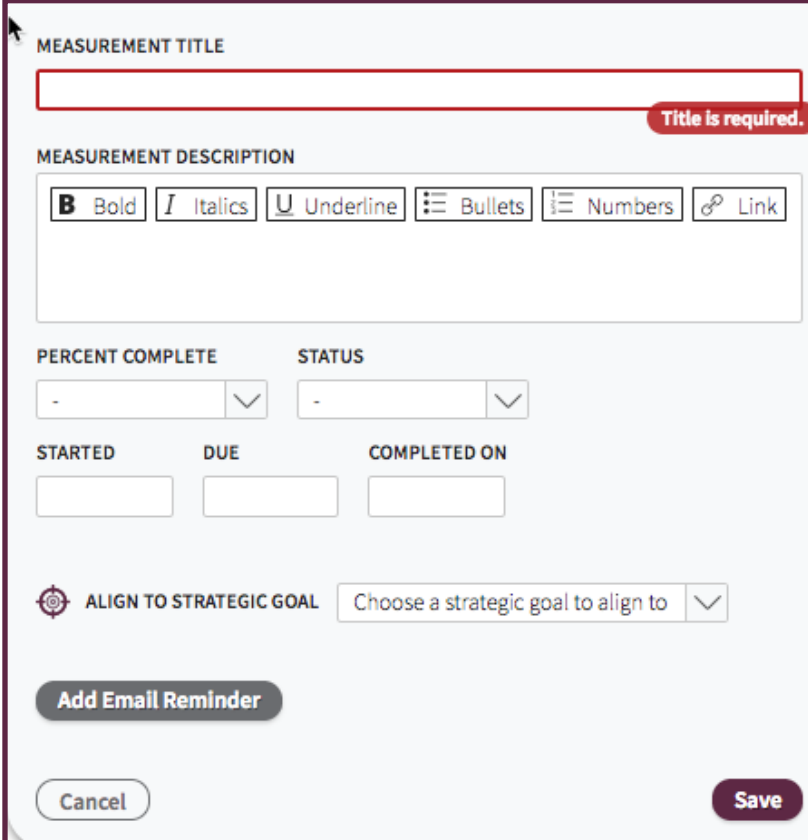
Measurements can be added to a competency or a goal. Click **Add Measurement** when you're ready to add a measurement.



The screenshot shows the "Vacuum Bedrooms" goal measurement interface. At the top, it says "Vacuum Bedrooms" added by Rosie Robot, with a progress indicator at 25%. Below this is a horizontal scale with five points: "Unacceptable", "Below Expectations", "Meets Expectations", "Exceeds Expectations", and "Outstanding". A mouse cursor is pointing at the "Meets Expectations" point. To the left of the scale is a checkbox labeled "N/A". Below the scale are three sections: "Measurements (0)" with a green-bordered "Add Measurement" button, "Notes (0)", and a text input field with the placeholder "Add a note..."

Step 3: Enter in the Measurement Details

Only the 'Measurement Title' is a required field. Finish by clicking **Save**.



MEASUREMENT TITLE

Title is required.

MEASUREMENT DESCRIPTION

B Bold *I* Italics U Underline


Bullets

Numbers
Link

PERCENT COMPLETE STATUS

- ▾ - ▾

STARTED DUE COMPLETED ON

 ALIGN TO STRATEGIC GOAL Choose a strategic goal to align to ▾

Add Email Reminder

Cancel **Save**

OPTIONAL

Keep yourself accountable with email reminders. Add an email reminder to your measurement by clicking '**Add Email Reminder**'. You can then choose when you would like the email reminder to be sent,

Request 360-Rater Feedback

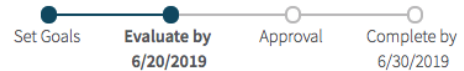
Step 1: Select the Employee You Want 360-Rater Feedback on
Hover your mouse over the Employee's Review progress bar and click.




Rosie Robot
Notes • Profile



Robo-Accountant
1/1/2018 - 6/30/2019



Step 2: Select Request/Manage Feedback in the Review Workshop



360-Rater Feedback

You haven't requested any 360-rater feedback.

[**Request Feedback**](#)

Step 3: Fill Out the Requested Information

On this page you can fill out who you would like to **Select as a 360-Rater**, **Add a 360-Rater Group**, select the **Elements to Include** for 360-Raters to score, choose to **make Feedback anonymous***, and then click **Save** when you're complete.

*360-Rater Feedback is always anonymous to the Employee. Checking the box to make Feedback anonymous makes the feedback anonymous to the managers and administrators as well.

Edit 360-Rater Group

GROUP NAME

ANONYMOUS FEEDBACK

Check to make all feedback anonymous

This option cannot be changed after 360-Rater feedback has been submitted.

MANAGER INSTRUCTIONS

Text entered here will be added to the email instructions received by each 360-Rater (optional).

Elements to include in 360-Rater reviews

- Core Competencies
 - Communication
 - Job Knowledge
 - Sense of Humor
 - Adaptability

Step 4: Manage the Feedback

You can manage the feedback that has been requested by selecting **Manage Feedback** from the review workshop at any time. Status indicators will show the progress of the 360-Raters that have been invited to provide feedback. Send a reminder to a 360-Rater if the request was issued but the 360-Rater has not responded. Delete a 360-Rater if desired.

360-Rater Feedback Group

[Edit](#) · [Remove](#)

	 Elroy Jetson Requested 3/7/2018	3.25 (Highly Effective)	View · Re-request Remove
	 Orbitty Jetson Requested 3/7/2018		Remind Remove

[Save 360-Raters](#)


PLEASE NOTE

Your employee's review must be in Evaluating Phase in order to request 360 Rater Feedback. Please contact your site administrator

Evaluate an Employee's Review

Step 1: Locate the Employee You Want to Evaluate


Select the employee you would like to Evaluate by clicking on their Review status bar.



The image shows a review status bar for an employee named Rosie Robot. On the left, there is a profile icon and the text "Rosie Robot" with links for "Notes" and "Profile". In the center, there is a document icon and the text "Robo-Accountant" with the dates "1/1/2018 - 6/30/2019". On the right, there is a progress bar with four stages: "Set Goals" (completed), "Evaluate by 6/20/2019" (current stage), "Approval", and "Complete by 6/30/2019".

Step 2: Select Evaluate Review from the Review Workshop

You can see your progress on the Employee's review, as well as the employee's progress of their self-review if applicable. You also have the ability to Override the self-review which will allow you to proceed without an employee completing a self-review.



The image shows the "Annual Review for Judy Jetson" interface. At the top, it says "Review Workshop". Below that, the title "Annual Review for Judy Jetson" is displayed. There are two main sections:

- 360-Rater Feedback:** A section with a dashed circle icon, the text "360-Rater Feedback", and a subtext "You haven't requested any 360-rater feedback." To the right is a dark purple button labeled "Request Feedback".
- Evaluate Review:** A section with a dashed circle icon, the text "Evaluate Review", and a subtext "Your Status 0%". Below this, there is a progress bar for "Self-Review" showing "100%" with a green checkmark and a rating of "3.04". To the right of the progress bar is a "Re-request" button. Below the progress bar is a "Compare Ratings" link with a bar chart icon. To the right of the "Evaluate Review" section is a large dark purple button labeled "Evaluate Review", which is highlighted with a green border.

The due date "Due: 6/20/2019" is displayed to the right of the "Evaluate Review" section.

Step 3: Select a Rating for Each Competency


Use the Rating Scale bar to choose a rating. You will also be able to see what the Employee rated themselves if they have already completed their self-review. You can also see any comments left. This is not applicable if the Employee has not completed their self-review.

Communication 12.5%

Communicates clearly, concisely and candidly with people at all levels of the organization; avoids vagueness, ambiguity and mixed messages.

N/A


Unacceptable Below Expectations **Meets Expectations** Exceeds Expectations Outstanding



Elroy Jetson
Jane Jetson

Communication is appropriate and comprehensible. Can present ideas and information in an effective manner.

^ Comments (0)



Jane Jetson
Created less than a minute ago

[Edit](#) • [Delete](#)

You are an excellent communicator.

Add a comment...


Step 4: Add a Comment if Desired

Save Comments by clicking “**Add this Comment**”. Comments are optional and can include an attachment that will be linked with the review.

Communication 12.5%

Communicates clearly, concisely and candidly with people at all levels of the organization; avoids vagueness, ambiguity and mixed messages.


Unacceptable Below Expectations **Meets Expectations** Exceeds Expectations Outstanding



N/A

Communication is appropriate and comprehensible. Can present ideas and information in an effective manner.

^ **Comments (0)**

 **Jane Jetson**

B Bold *I* Italics U Underline ☰ Bullets ☰ Numbers 🔗 Link

You are an excellent communicator.

✓ Coaching Tips

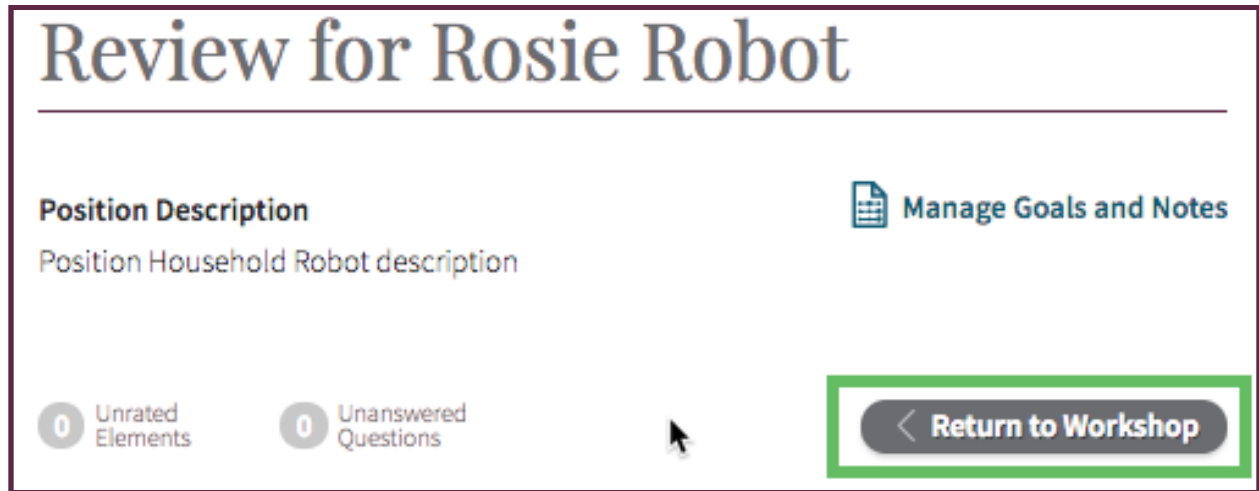
Cancel
Attach a file

Add this comment

HELPFUL INFORMATION

Use the **Coaching Tips** to find comments a manager may use for the corresponding competency. Click the “+” sign to copy them into the comments box.

Step 5: Click **Return to Workshop** when completed



Review for Rosie Robot

Position Description Manage Goals and Notes

Position Household Robot description

0 Unrated Elements 0 Unanswered Questions

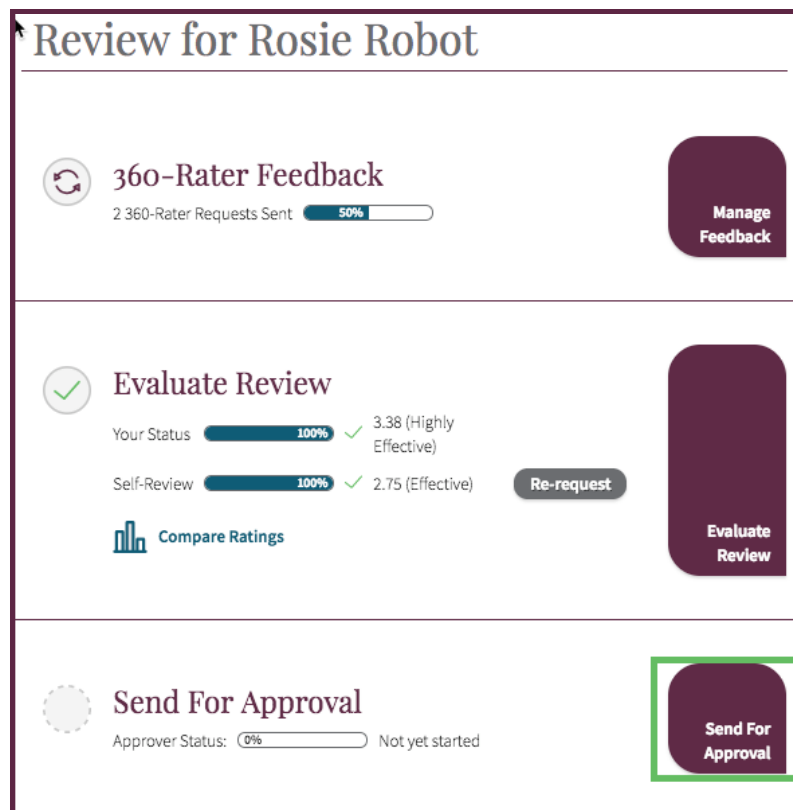
[< Return to Workshop](#)

Send Review for Approval

Step 1: Locate the Employee you would like to Send approval for
 Hover your mouse over the Employee's Review progress bar and click to enter their review workshop.



Step 2: Click Send for Approval in the Review Workshop



Step 3: Choose or View Who the Review Will be Routed

This step can vary based on how your Administrators have created your Company's Review process.

Step 4: Leave Any Notes for Approvers

ALL Approvers will receive the message saved in this box as an email notification.

Approver Guidance (optional) ⓘ

HELPFUL INFORMATION

All approvers will see all submitted information, including employee, manager, and 360-rater feedback.

Approvers can Approve/Reject Reviews, as well as leave comments.

Utilize **Cancel Approval** option if you chose the wrong route for

Archive a Review

Note: These steps are only necessary if the Auto-Archive feature is not utilized in your account.

Step 1: Locate the Employee You Are Ready to Archive

Hover your mouse over the Employee's Review progress bar and click. You can only archive a Review if all required steps are complete.



Step 2: Click **Archive Review** from the Review Workshop



Step 3:

Click **Archive Review** to finalize Archival

Based on your account settings, your Reviews may archive automatically allowing you to skip this step.

