Reviewsnap Employee Guide

reviewsnap

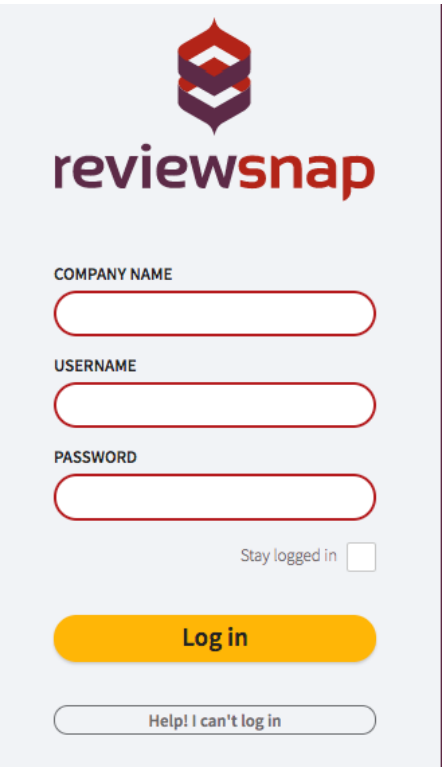
Log In

Step 1: Navigate to **www.reviewsnap.com**

Click **Client Login** on the top right of the screen.

Step 2: Input Company Name, Username, and Password.

Passwords are case sensitive.



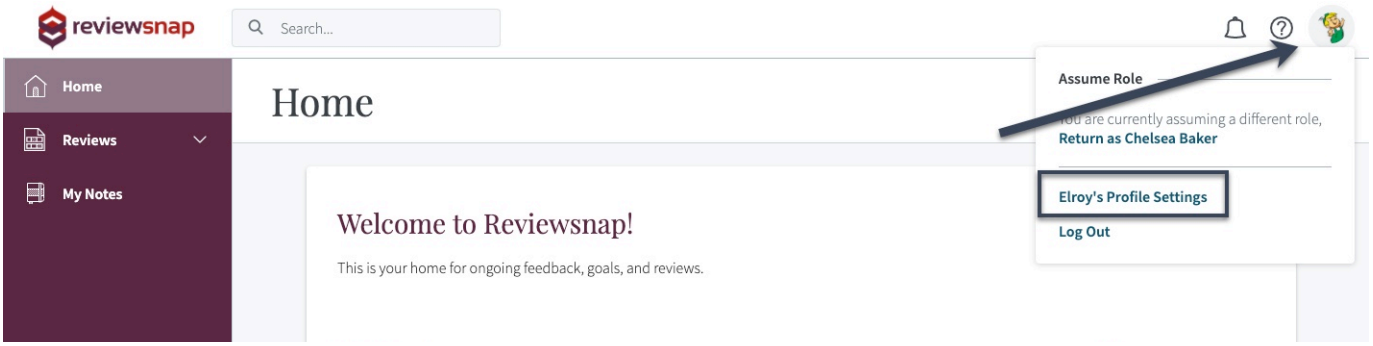
FORGOT YOUR PASSWORD?

Click the button under the login details: **"Help! I can't log in"**

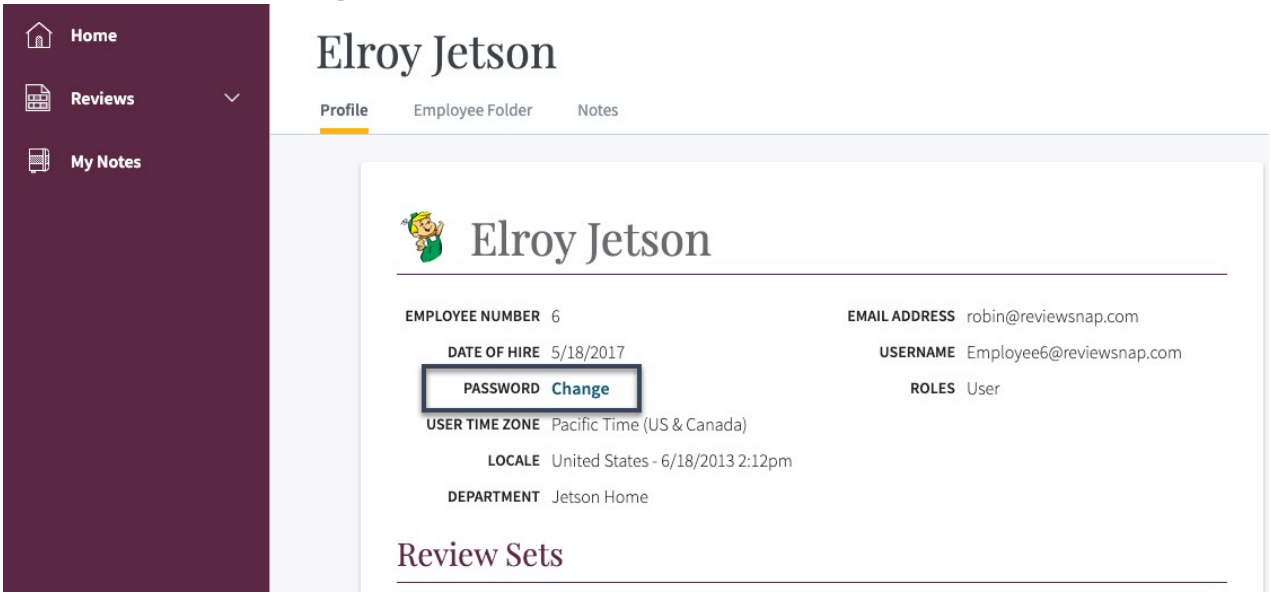
We'll send you an email that contains a personalized link to reset it.

Change Your Password

Step 1: Click on your profile photo, or initials, and then click Profile Settings

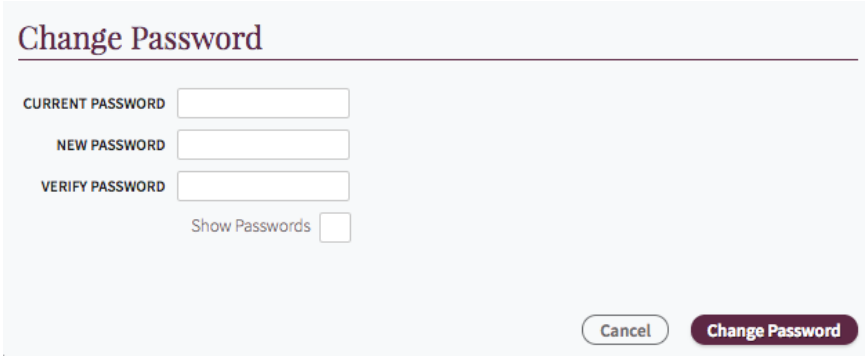


Step 2: Click **Change**



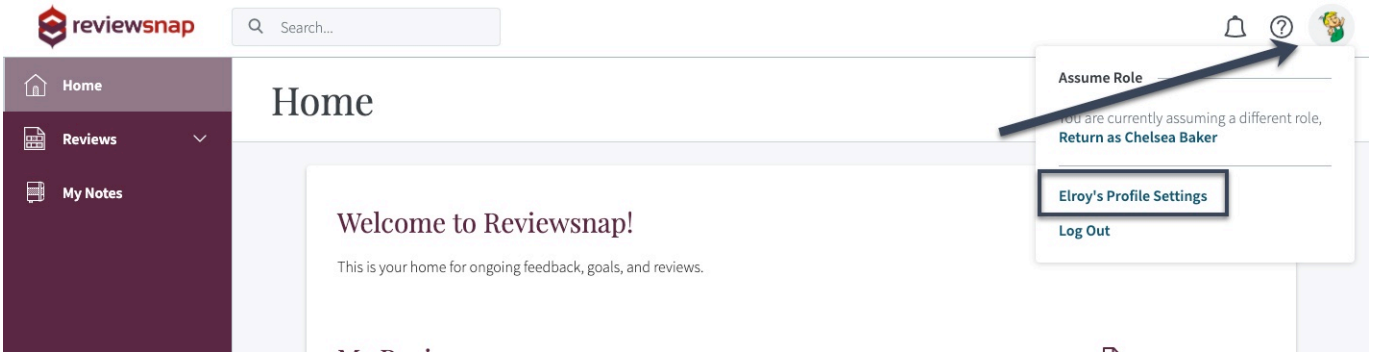
Step 3: Type In Information Required

You are required to fill in your old password, new password, and to verify the new password.



Upload or Change your Photo

Step 1: Click on your profile photo, or initials, and then click Profile Settings



Step 2: Hover over your Photo

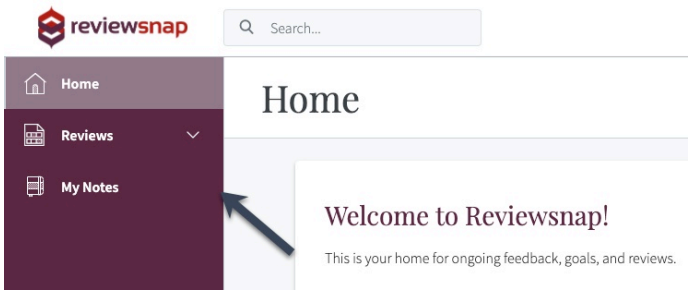
Step 3: Choose an Image from your Computer

It's a thumbnail - a 16x16 picture works best. Click 'Save' to finalize changes.

Take a Note on your Review

Step 1: Select **My Notes** on the Homepage

You can find 'My Notes' in the navigation bar and above your reviews.



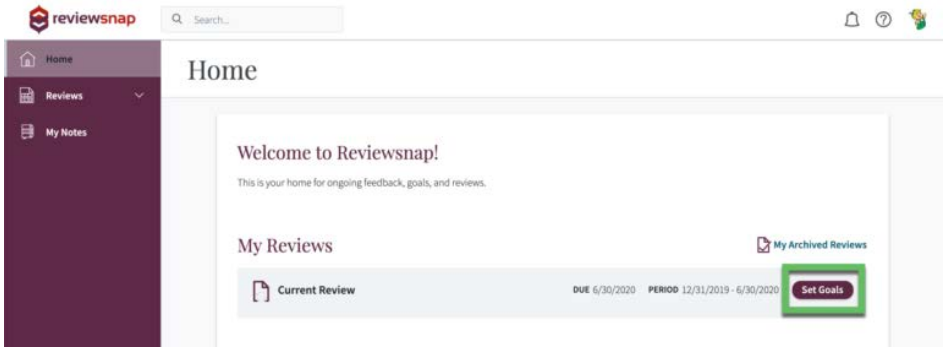
Step 2: Input your Note

Enter your note in the text box and select a privacy setting to determine if the note will be visible to your manager. Select a competency that this note is related to. If no competency is selected, your text will be placed in the General Notes section. You may also attach a file (Customer Letter, Certificate etc.). Save by clicking **Add This Note**.

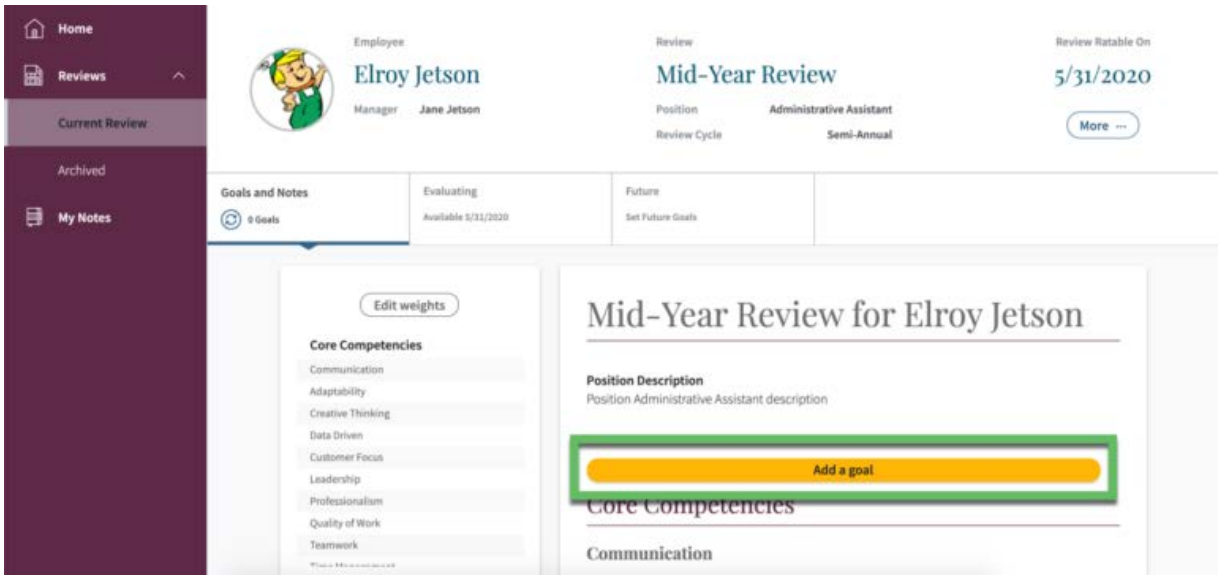
Add a Goal to your Review

Step 1: Click **Set Goals** under Current Review

If your Review is in the Evaluating phase, this button will say "Evaluate Review". You will need to click **"goals and notes"** tab on the next page to add goals to your review.

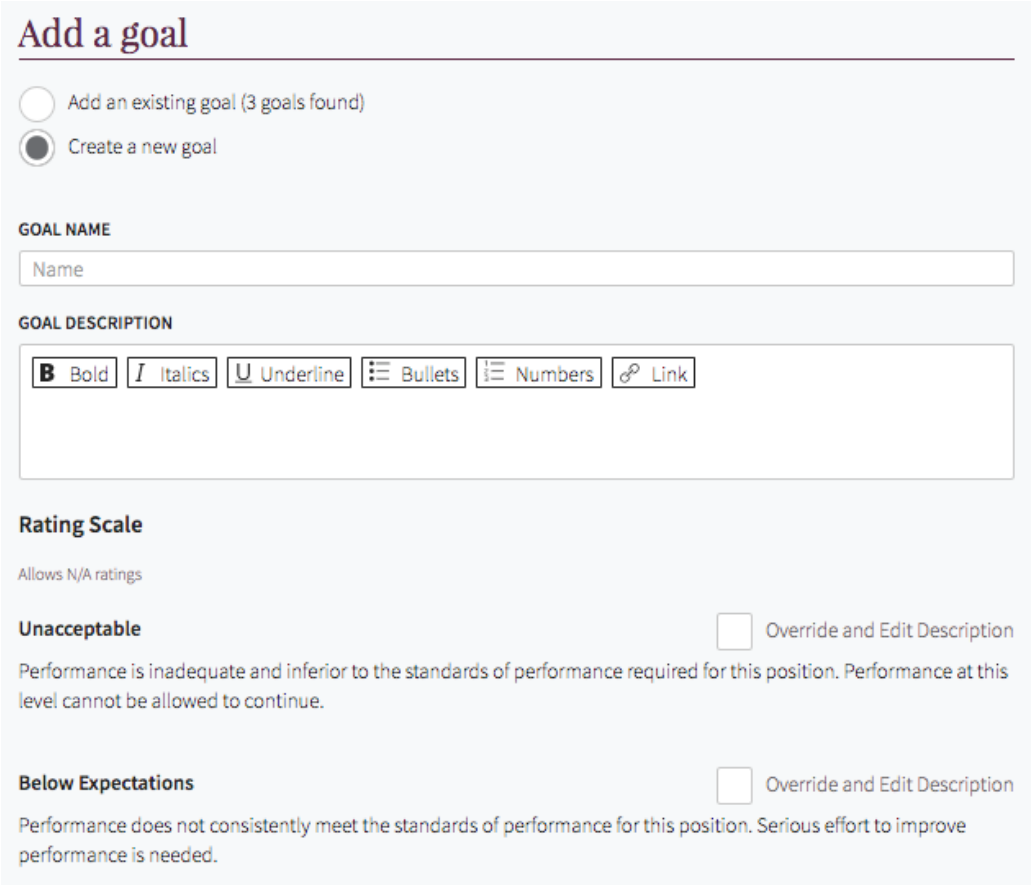


Step 2: Click Add a Goal at the top of the review, under the review hub



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

Fill in the name of the goal and a description if desired. Select the appropriate rating scale. **Save Goal** when done.



HELPFUL INFORMATION

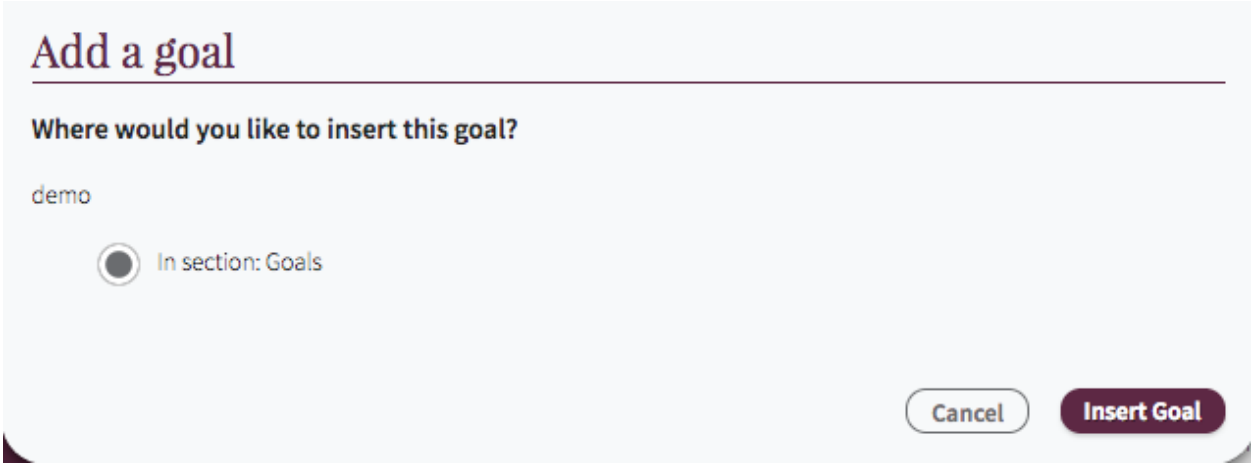
If employee Goal Setting is enabled, you will see an “Add a Goal” button. Managers may have the ability to set goals too.

If not you will be able to add a Measurement which is attached to a competency. Goals are big picture competencies that are set specifically for an individual to focus on.

Goals are eventually scored and can carry weight on the overall review.

Step 4: Select the Location of the Goal

Select **Insert Goal** once you have selected the section for the Goal. Typically there will only be one option here however, your organization may have multiple goal sections.



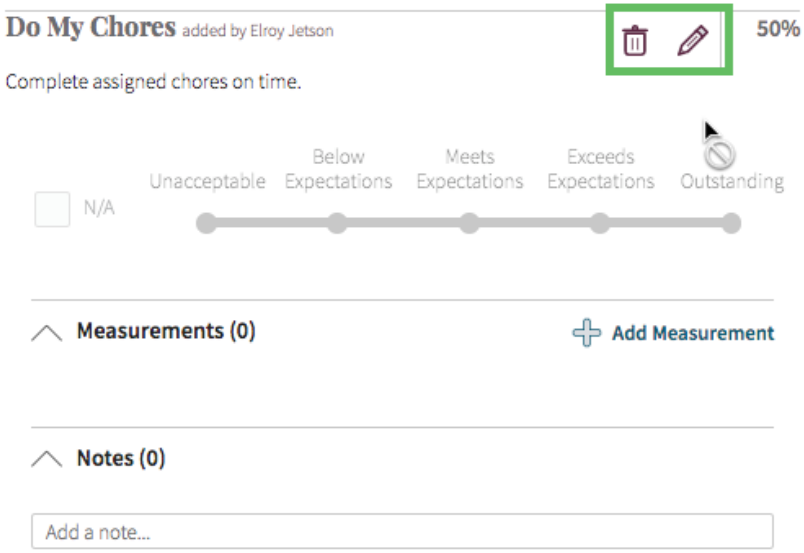
PLEASE NOTE

Now, your new goal shows up as a line item that will be scored during your next evaluation.

Edit or Remove a Goal

Step1: Hover your mouse over the Goal

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



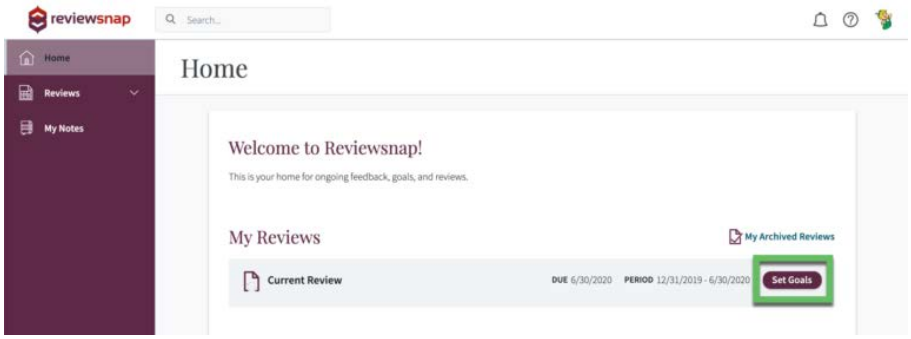
Step 2: Editing your Goal

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 most likely have mathematical consequences on your review.

Add a Measurement to Your Review

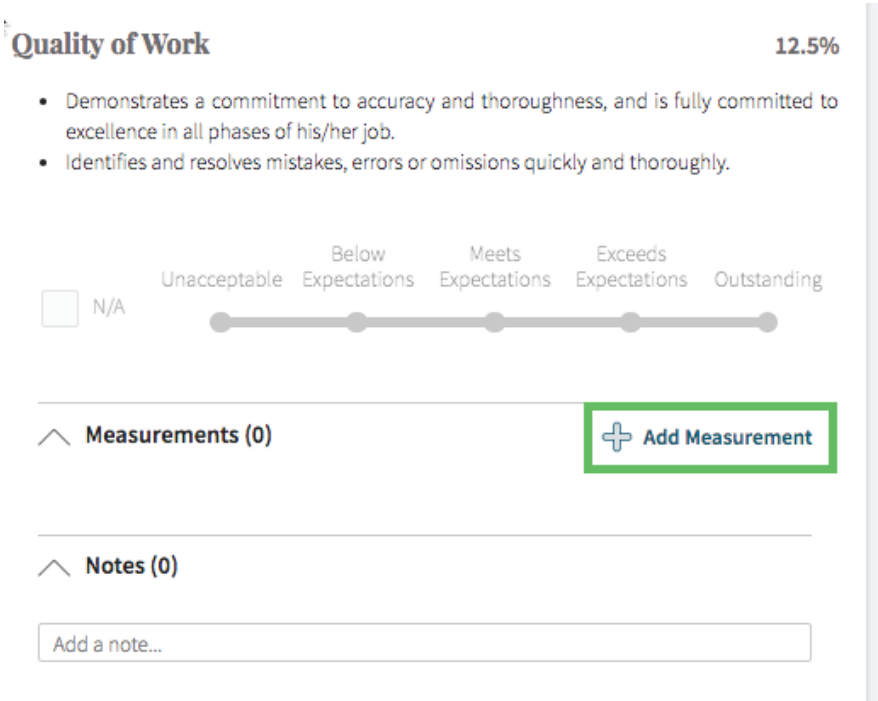
Step 1: Click **Set Goal** or **View Review** under the Current Review

If your Review is in the Evaluating Phase, this button will say “Evaluate Review”. You will need to click “**Goals and notes**” tab on the next page to add goals to your review.



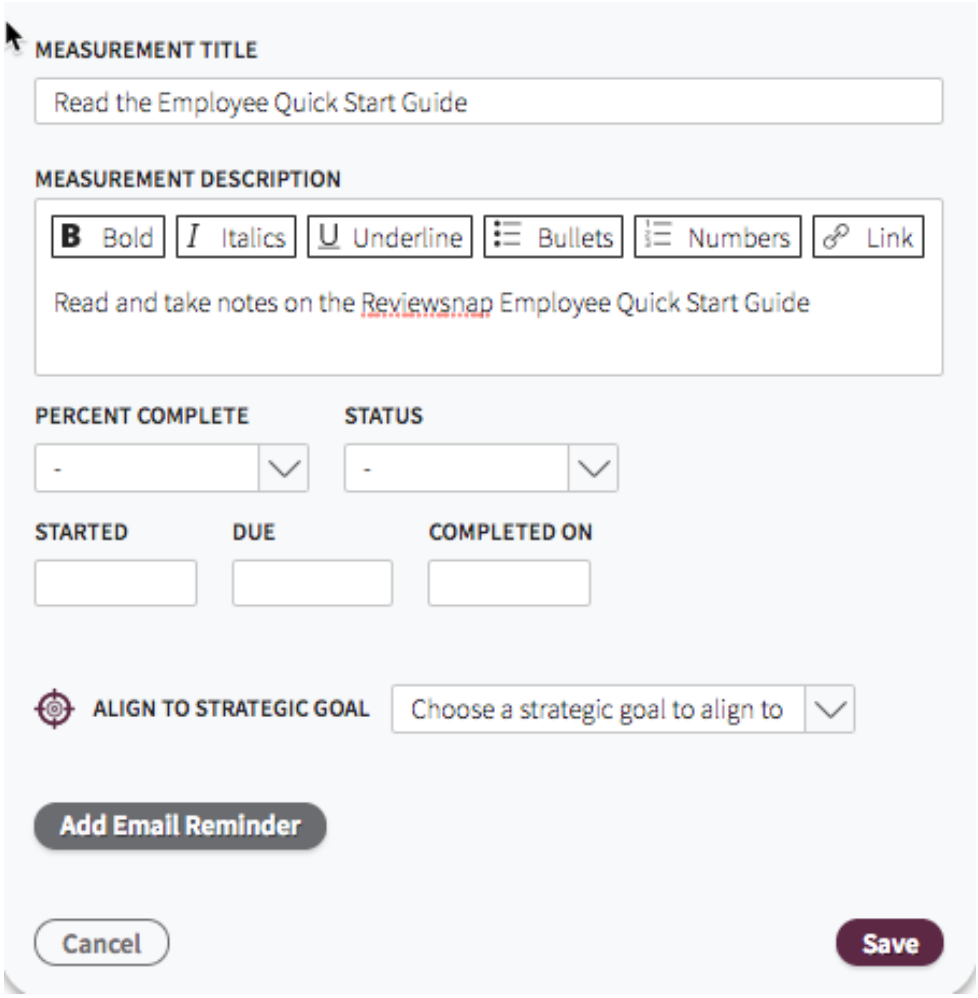
Step 2: Locate Where You Want to Add a Measurement

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



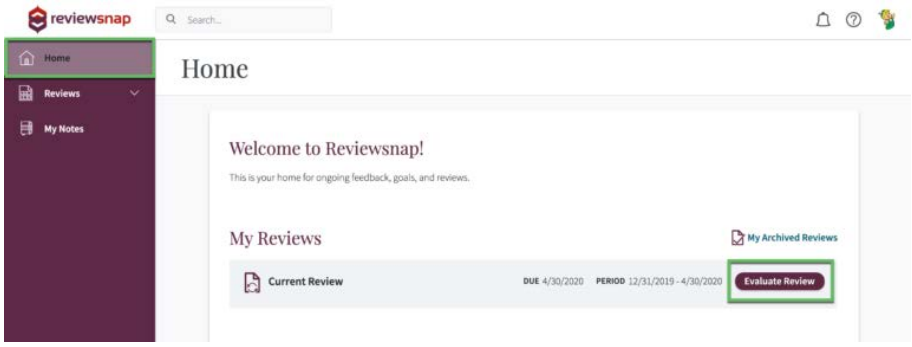
Step 3: Fill in the **Measurement Fields**

Only the 'Measurement Title' is a required field. This is a great place for any SMART details you would like to include. Finish by clicking **Save**.

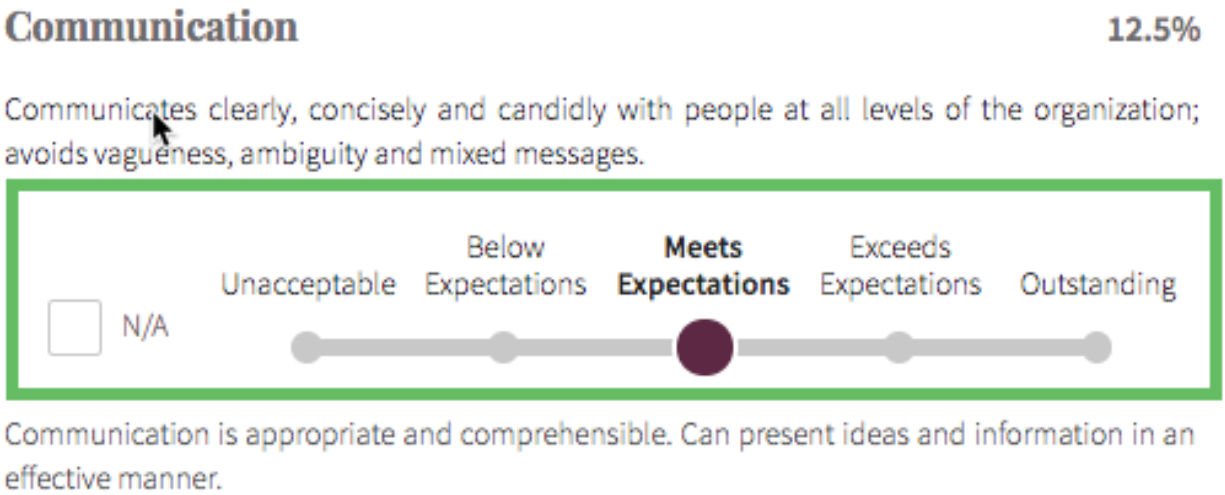


Score your Self-Review

Step 1: Click **Evaluate Review** on the Home Page



Step 2: Select a Rating for each Competency

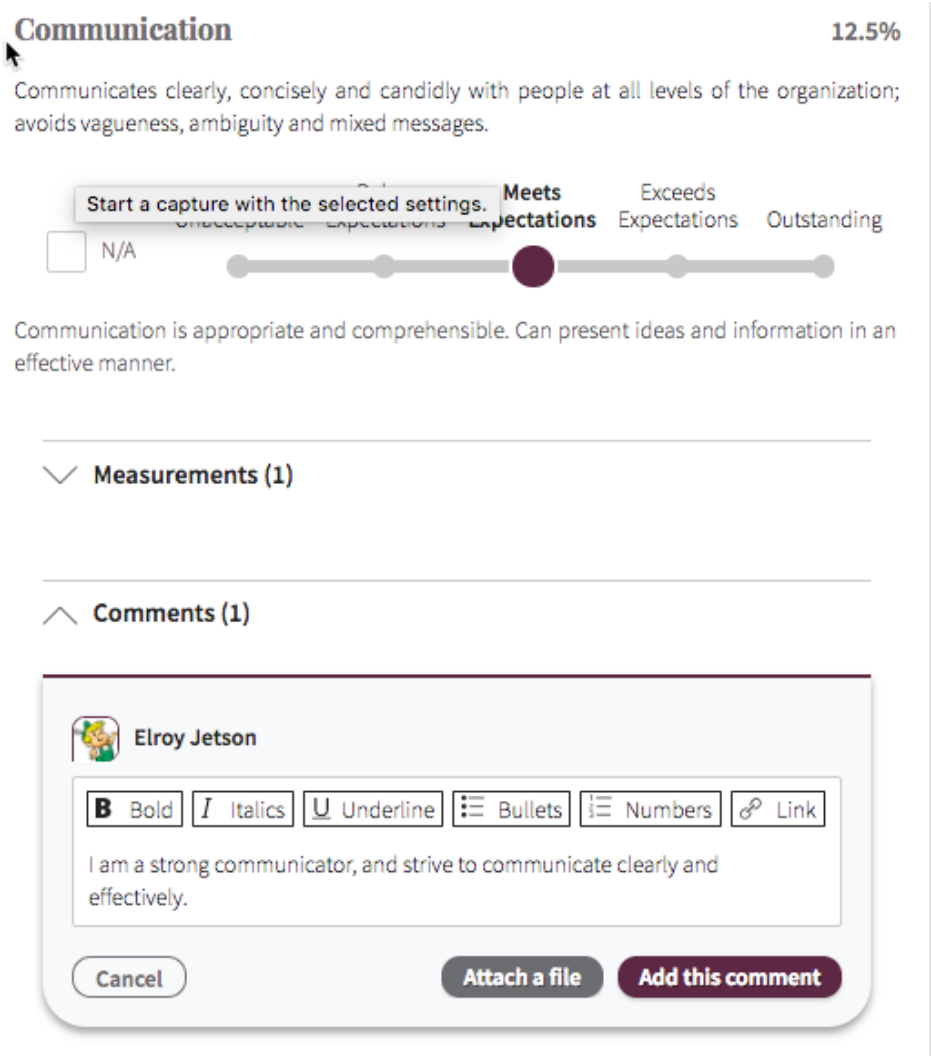


HELPFUL INFORMATION

Your current review will enter the evaluating window at your organization's designated evaluation time. At that time, your current review button will change from "Set Goals" to "Evaluate Review" and you can begin evaluating.

Step 3: Add 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.



HELPFUL INFORMATION

If you have taken notes throughout the 'Goals and Notes' period, you can review your notes within the notes section. You are also able to copy the notes to comments and edit them to be seen with your final, scored review.

Step 4: Answer Open-Ended Questions

Reviewsnap requires answers to all questions. To save, click **Save This Comment**.

Step 5: Use Summary Comments for Final Thoughts

You can provide any attachments with summary comments as well. Summary comments are not required.

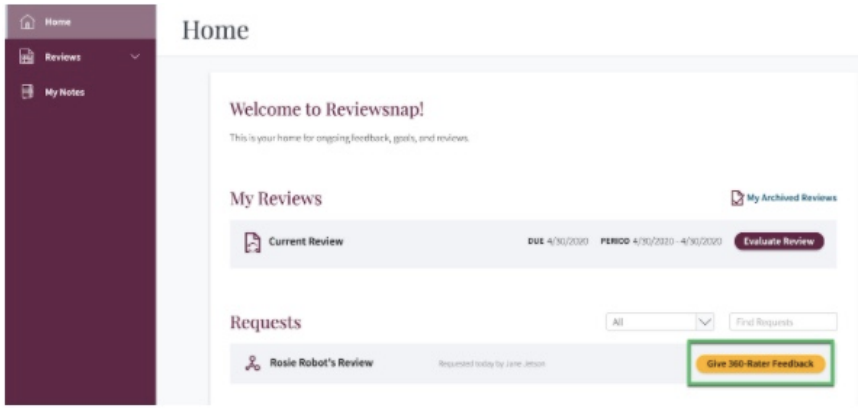
Step 6: Send to Manager Upon Completion

Your manager can't see any self-review information until you click **Send to Manager**. Also, the Self- Review can't be edited once it has been sent to your manager.

Provide 360 Feedback

Step 1: Click **Give 360 Rater Feedback**

If you are asked to provide 360 Feedback, you will receive an email and the request will appear on your **Home** page under **Requests**.



Step 2: Complete the Request

Select a rating from the rating scale for each competency listed (you may have N/A as an option). You can also add comments if desired. The scores and comments are sent directly back to the requesting manager. You may also be asked to answer some open ended questions.

Step 3: Click Send to Manager when Completed

When all competencies have been scored, and all the questions have been answered, you can click **Send to Manager** to complete Multi-Rater Feedback.