



# Reviewsnap Performance Review Start-Up Guide

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## Reviewsnap Performance Review Start-Up Guide

### I. Performance Review Cycle

**The performance cycle begins in July** with the mutual establishment of goals and development activities based on what is to be accomplished during the calendar year, including the training and development objectives. This is the result of a discussion between the supervisor and the employee to ensure that the individual's goals and development plan support what needs to be accomplished by the department in order to contribute to the Institute's strategic initiatives and mission. These plans are then cascaded upward to be integrated with the Institute's overall goals.

The supervisor is responsible for adding the established goals into the "*Performance Objectives*" section of the performance review form, and related training and development objectives to the "*Training and Objectives*" section.

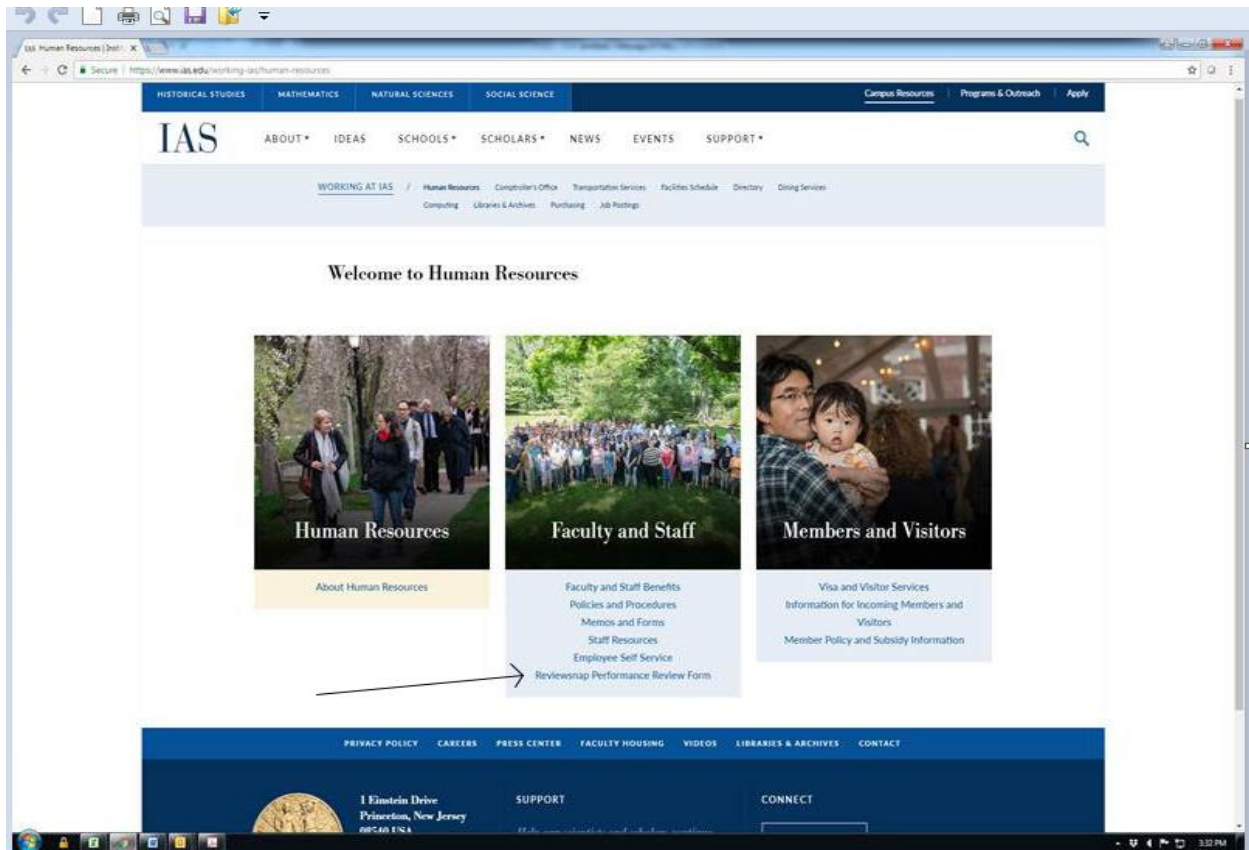
**On an ongoing basis throughout the year**, both the supervisor and employee are responsible to ensure that they discuss progress to date towards the goals and expectations, provide feedback, and determine whether any adjustments to the goals or behaviors are needed. There should be regular ongoing feedback throughout the year. These occasional check-ins prevent surprises at the annual performance meeting and review.

**The Year-End Review Meeting** between the employee and the supervisor is conducted and signed-off some time in April to-mid May. This process, which includes both the final performance review and employee's self-review, is intended to be a discussion regarding goal accomplishment, and the results of the development plan activities. The purpose of this discussion should be a mutual understanding of overall performance results for the current year, and the specific actions needed for future successful performance.

PHASE	ACTION	EMPLOYEE DUE DATE
BEGIN	Plan goals and development for the year	Early September
ONGOING	Review performance and progress towards goals	Ongoing
YEAR-END	Evaluate year-end results	April - May

## II. Logging In to Reviewsnap

The link to access Reviewsnap has been added to the IAS website under the *Campus Resources/Working at IAS/Human Resources* dropdowns.



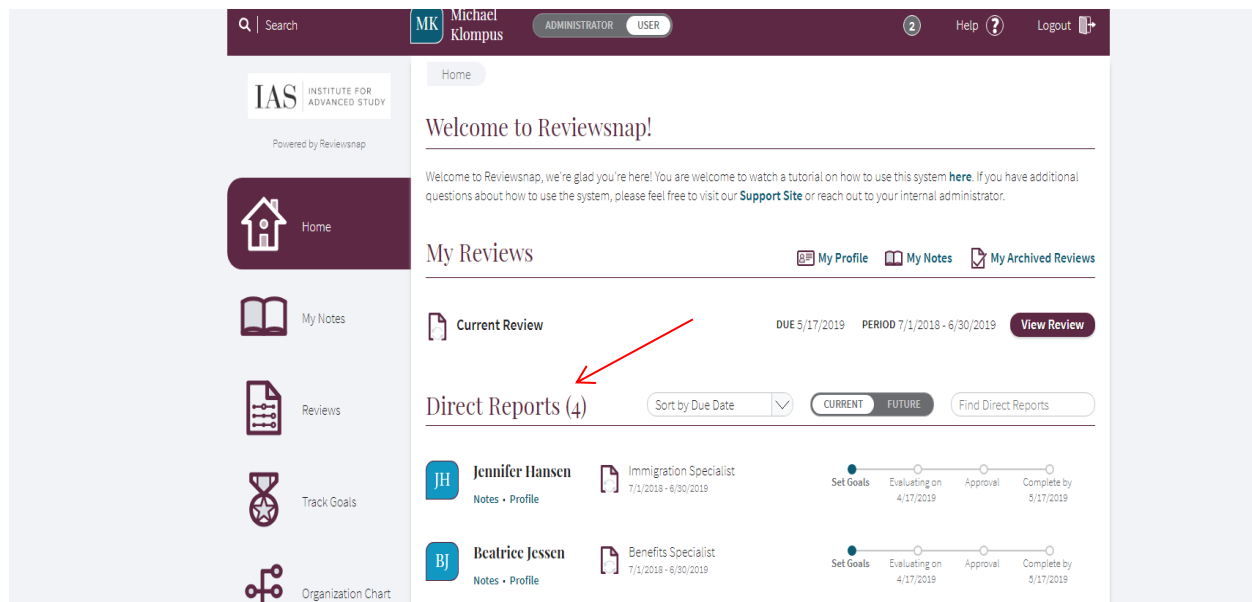
When you select “Reviewsnap Performance Review Form” it will take you to the login page, so long as you are not already logged into another application. The program is enabled with single sign-on for ease in use.

*If prompted to login, both the username and password are the same as your IAS credentials.*

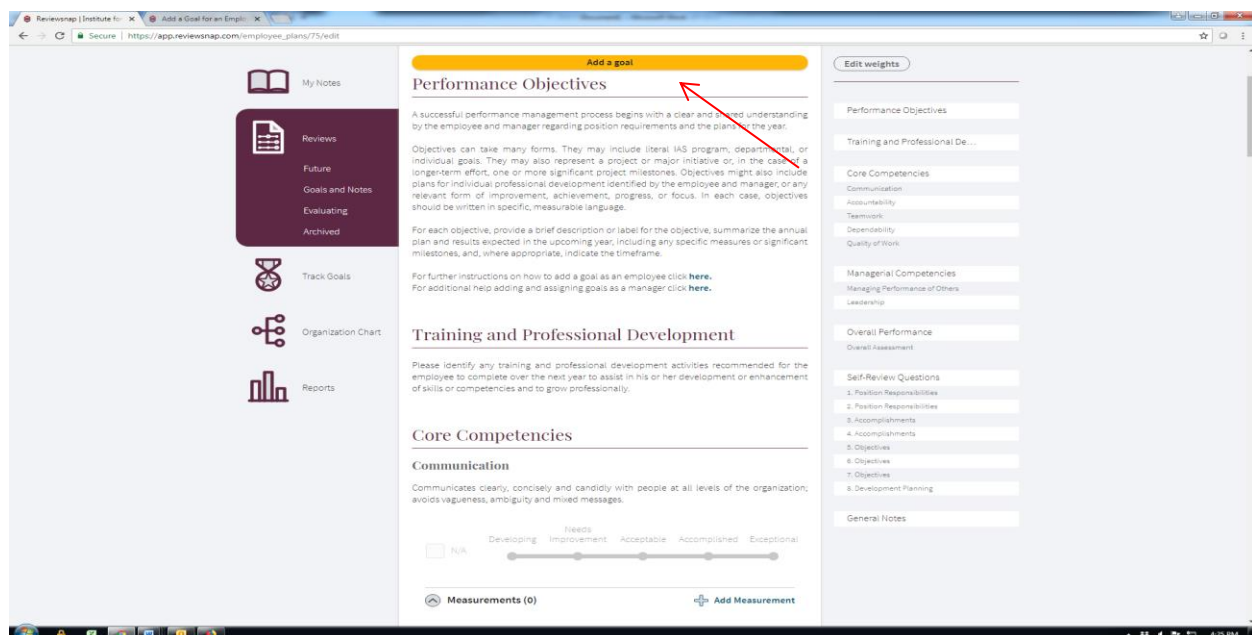
### III. Adding Goals and Objectives (For Supervisors Only)

Once the goals and professional development objectives have been established, it is up to the Supervisor to reflect this information in the performance review form.

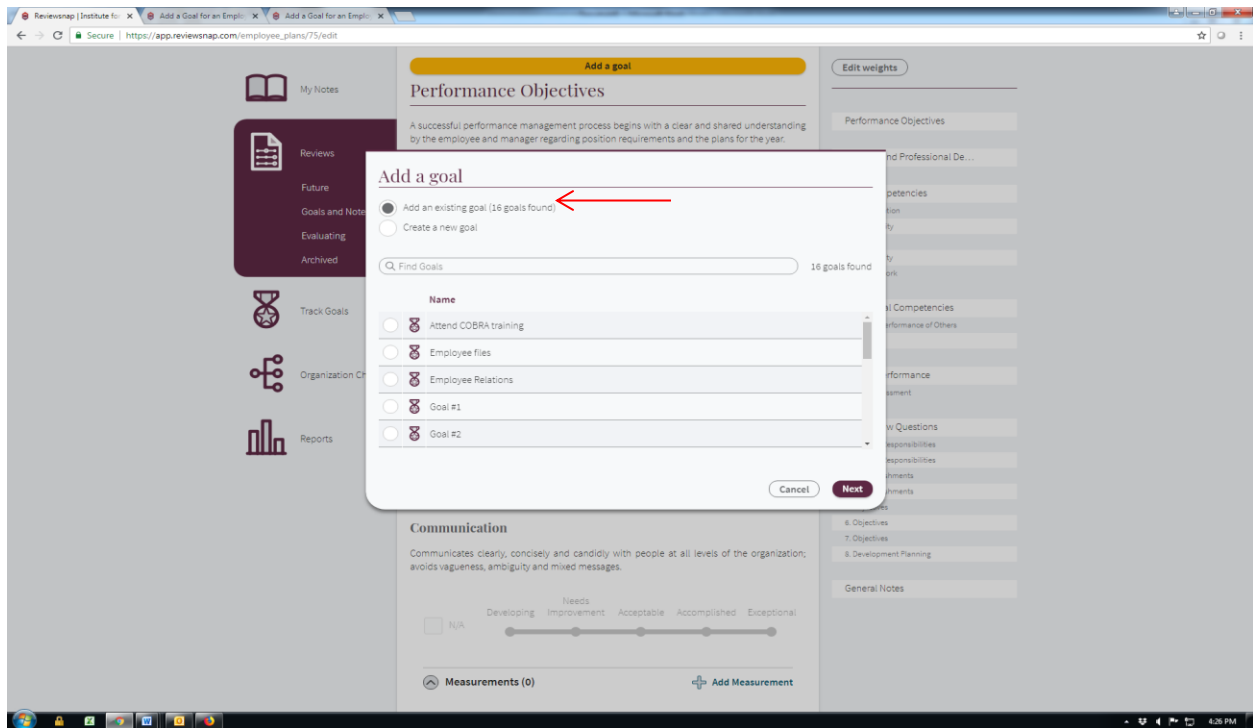
Step 1: Select the review to be edited from the home page



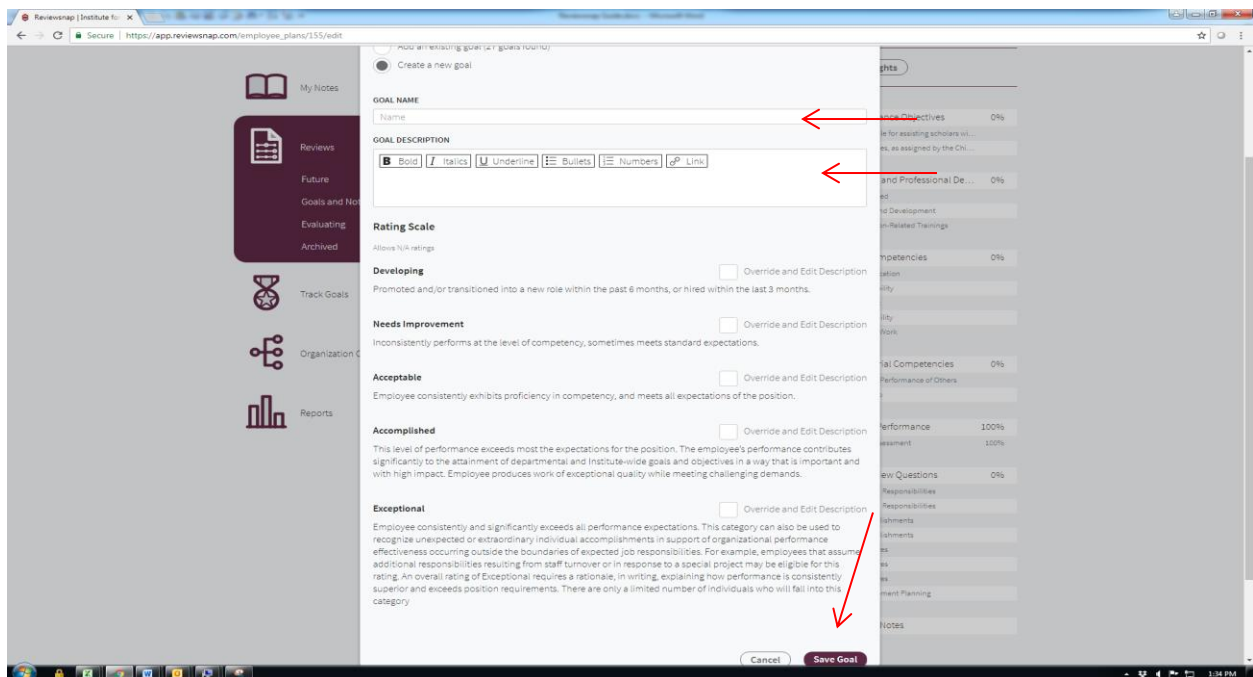
Step 2: When the review form appears, click **Add a Goal** at the top of the page.



### Step 3: Select **Add an Existing Goal** or **Create New Goal**.

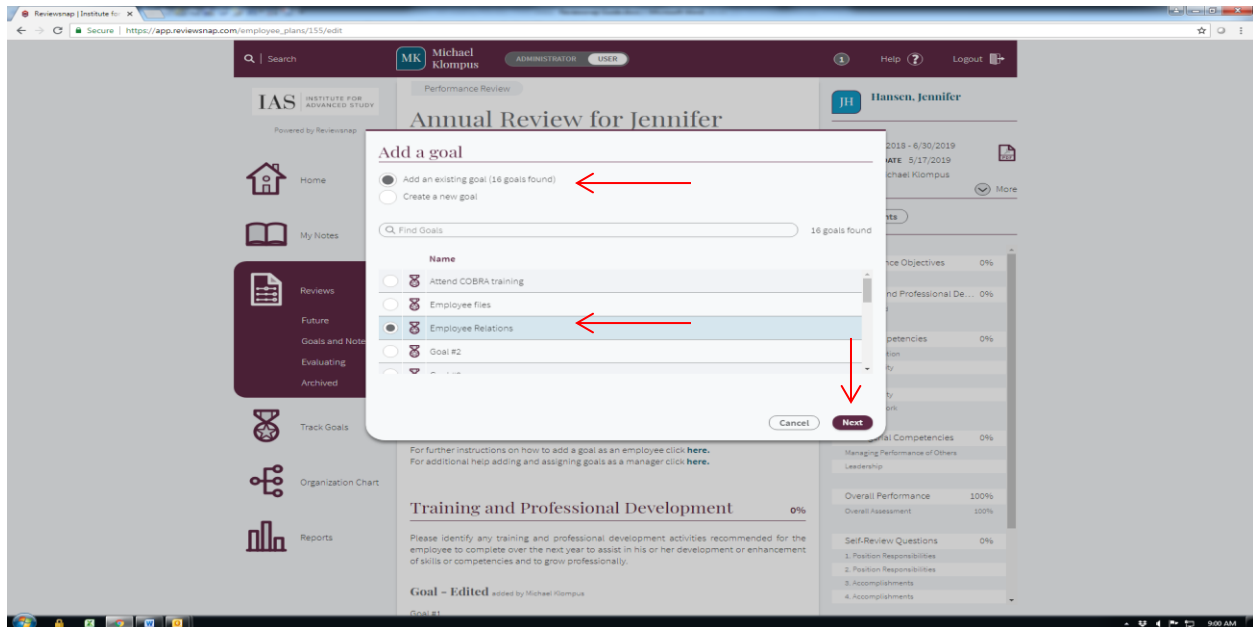


If you choose to **Create a New Goal**, fill in the **Name** and **Description** fields for the goal. When finished, click **Save Goal**.



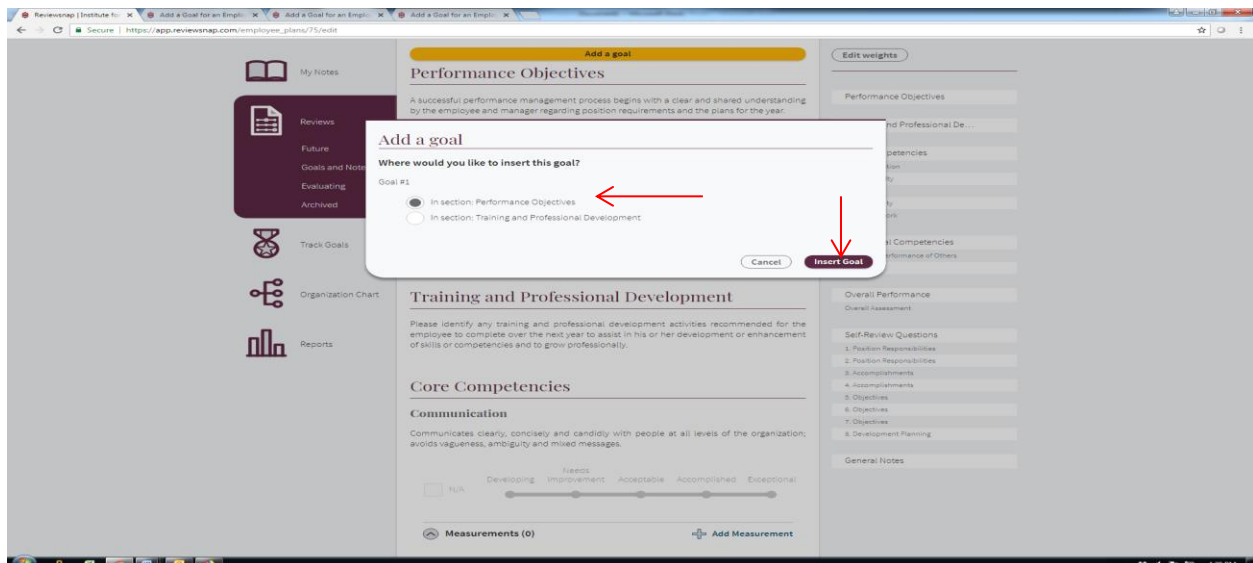
You will then be asked whether you want to add the goal to **Program Objectives** or **Training and Professional Development**. Please refer to Step 4 on the following page for additional instructions.

If you wish to use a goal that had previously been created, please choose **Add an Existing Goal** and select the goal from the presented options.



Once you have completed this step, click **Next**

Step 4: After you complete the **Add an Existing Goal** or **Create New Goal** step, you will need to select where this goal will be placed on the review. You can add the goal to the Performance Objective section, or the Training and Development Section. Select the appropriate location and click **Insert Goal**.

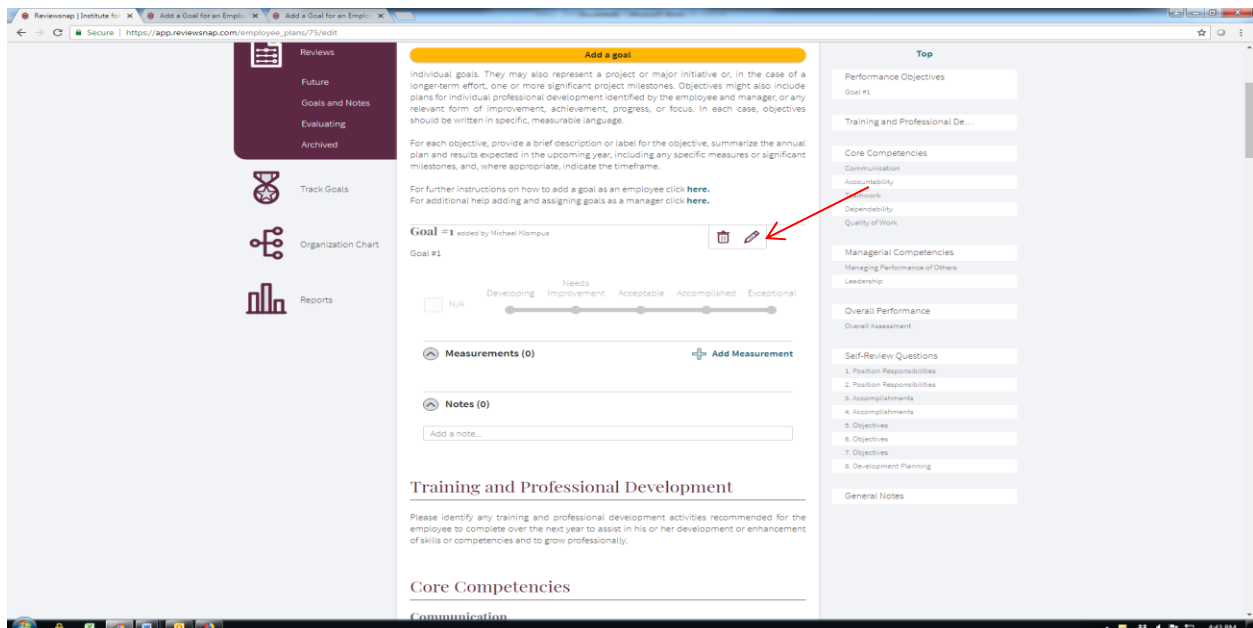


The goal will then be saved and added to the review.

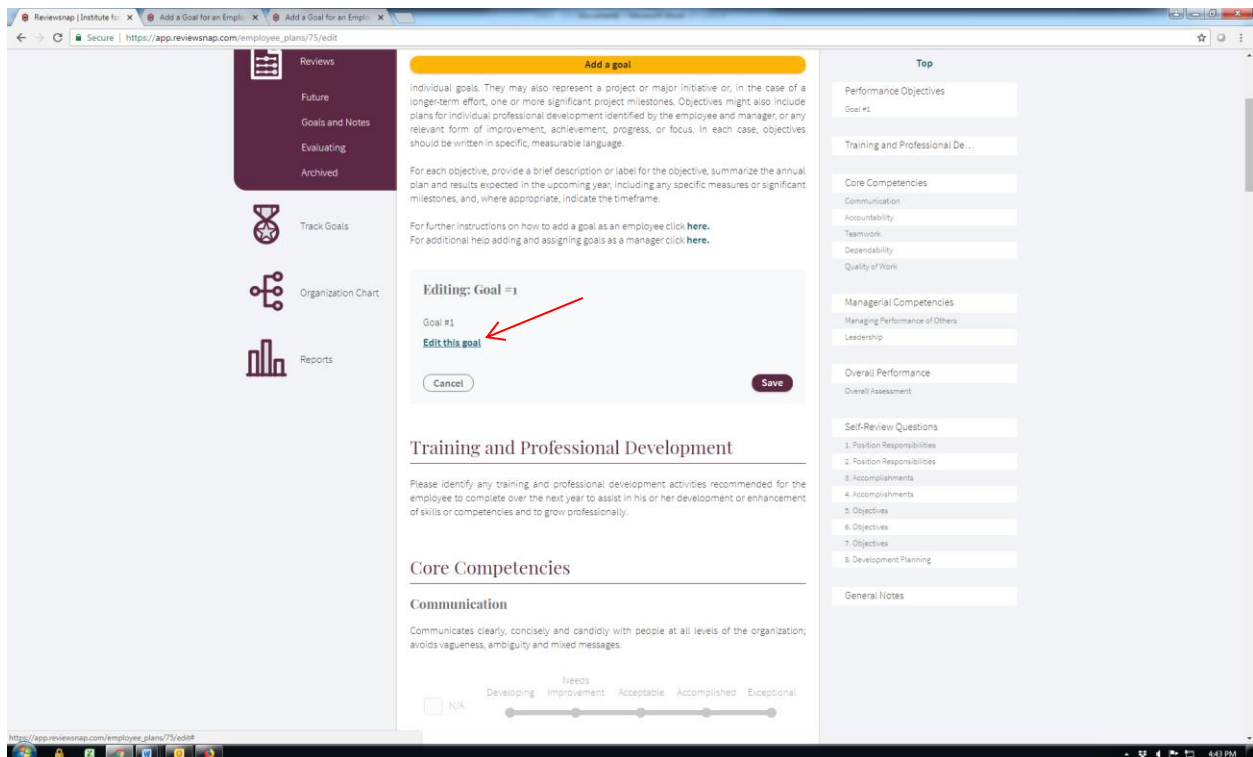
#### IV. Editing a Goal or Objective (For Supervisors Only)

Supervisors have the ability to change a goal or objective that was established during the beginning of the performance cycle.

Step 1: Place the cursor over the goal, and select the **Edit** icon



Step 2: Select **Edit This Goal**





Step 3: Input any changes to the goal name and/or description

And then select **Save Goal**

Reviewnap | Institute for...

Secure | https://app.reviewnap.com/employee\_plans/75/edit

Goal - Edited

GOAL DESCRIPTION

**B** **Bold** *I* *Italics* U Underline

- 

- 

- 

- 

[Link](#)

Goal #1

**Rating Scale: IAS Scale**

Allows N/A ratings

**Developing** ☐ Override and Edit Description  
Promoted and/or transitioned into a new role within the past 6 months, or hired within the last 3 months.

**Needs Improvement** ☐ Override and Edit Description  
Inconsistently performs at the level of competency, sometimes meets standard expectations.

**Acceptable** ☐ Override and Edit Description  
Employee consistently exhibits proficiency in competency, and meets all expectations of the position.

**Accomplished** ☐ Override and Edit Description  
This level of performance exceeds most the expectations for the position. The employee's performance contributes significantly to the attainment of departmental and Institute-wide goals and objectives in a way that is important and with high impact. Employee produces work of exceptional quality while meeting challenging demands.

**Exceptional** ☐ Override and Edit Description  
Employee consistently and significantly exceeds all performance expectations. This category can also be used to recognize unexpected or extraordinary individual accomplishments in support of organizational performance effectiveness occurring outside the boundaries of expected job responsibilities. For example, employees that assume additional responsibilities resulting from staff turnover or in response to a special project may be eligible for this rating. An overall rating of Exceptional requires a rationale, in writing, explaining how performance is consistently superior and exceeds position requirements. There are only a limited number of individuals who will fall into this category.

**Please Use Caution**

IAS Scale  Change the rating scale used for this goal.

## V. Taking Notes in Your Performance Review

The performance review form allows both supervisors and employees the opportunity to take notes and provide updates throughout the year about the established goals and objectives, and the training and development goals. (NOTE: if you are interested in using the Measurements functionality for the performance review, please speak with Human Resources for individual instruction).

*Option #1 allows you to add notes related to a specific performance-related objective:*

**Step 1: Under the specific objective, click the Add a Note Section**

The screenshot shows the 'Add a goal' section of the Performance Review form. The 'Goal #1' is 'Needs Improvement'. Below the goal, there is a 'Measurements (0)' section and a 'Notes (0)' section. A red arrow points to the 'Add a note...' text input field in the 'Notes (0)' section. The right sidebar contains a 'Top' navigation menu with links to Performance Objectives, Training and Professional Development, Core Competencies, Managerial Competencies, Overall Performance, Self-Review Questions, and General Notes.

**Step 2: Insert your note**

During this step, you have the option to type in a note, or attach a file that might be relevant for your performance review or the review of your direct report. You also have the ability to share the note with your manager/direct report, or to keep the note private so only you have access.

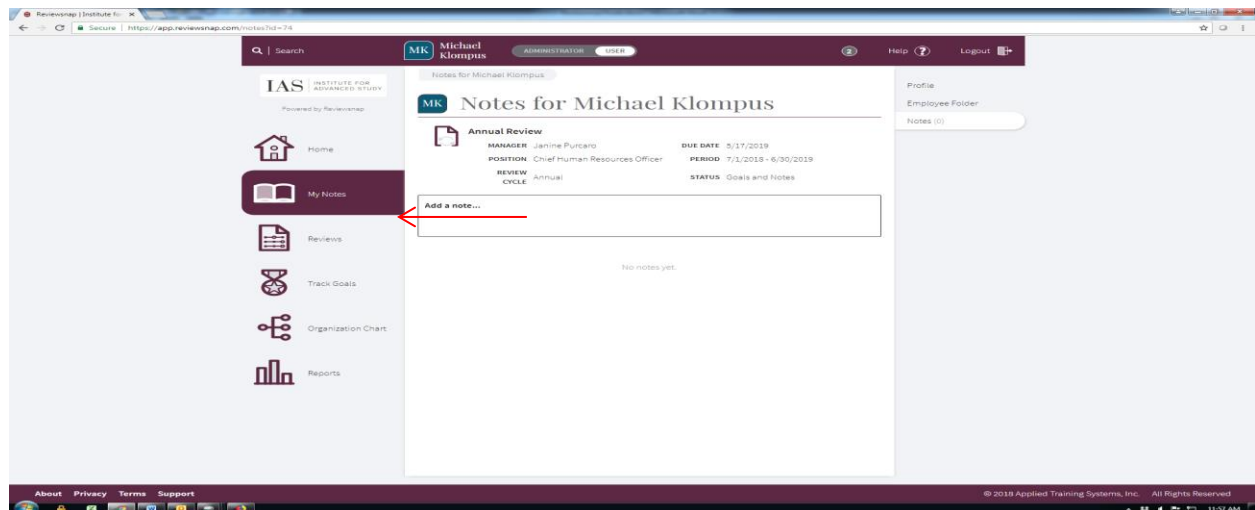
The screenshot shows the 'Add a Note' dialog box. The dialog box has a text input field for the note, a 'VISIBLE TO SEARTRICE' section with 'Yes' and 'No' radio buttons, and buttons for 'Cancel', 'Attach a file', and 'Add this note'. A red arrow points to the 'Add this note' button. The background shows the same 'Add a goal' section as the previous screenshot.

Once completed, select **Add This Note** or **Attach a File**

The notes function can be used in the same manner for any rating category (Performance Objectives, Training and Development, and Core Competencies), as well as for the Self Review.

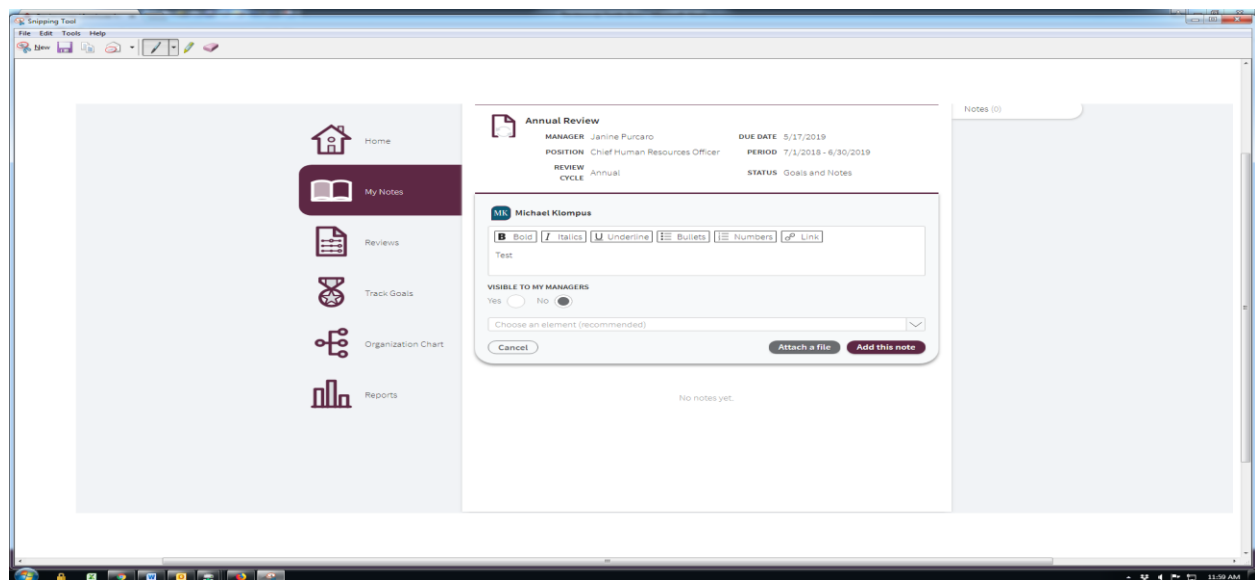
*Option #2 allows you to add a more general note that is not related to any specific performance-related objectives*

Step 1: Click the **My Notes** option on the side bar



Step 2: Insert your note

You have the option to type in a note, or attach a file that might be relevant for your performance review or the review of your direct report. You also have the option to share the note with your manager/direct report, or to keep the note private so only you have access.



Once completed, select **Add This Note** or **Attach a File**.

## VI. Year-End Review Process

Approximately one month before the year-end reviews are due, managers will have the opportunity to rate their staff in the Performance Objectives, Training and Development, and Core Competencies sections. Managers will also be required to provide an overall performance assessment. Staff will also be able to complete the Self Review section. Any notes taken throughout the year will be available during this stage. As a reminder, those notes that were marked as being private will remain visible to you only through all stages of the performance review process.

Please note that this functionality will not be made available during the year. Once the evaluation period begins in April, the program will allow you to complete the form in its entirety.

For more detailed information about Reviewsnap, you can select the Help option from the home page, which will take you to a site that has support articles, videos, and guides.

