



Reviewsnap

Guide for

Supervisors

4/18/2019

Reviewsnap Guide for Supervisors

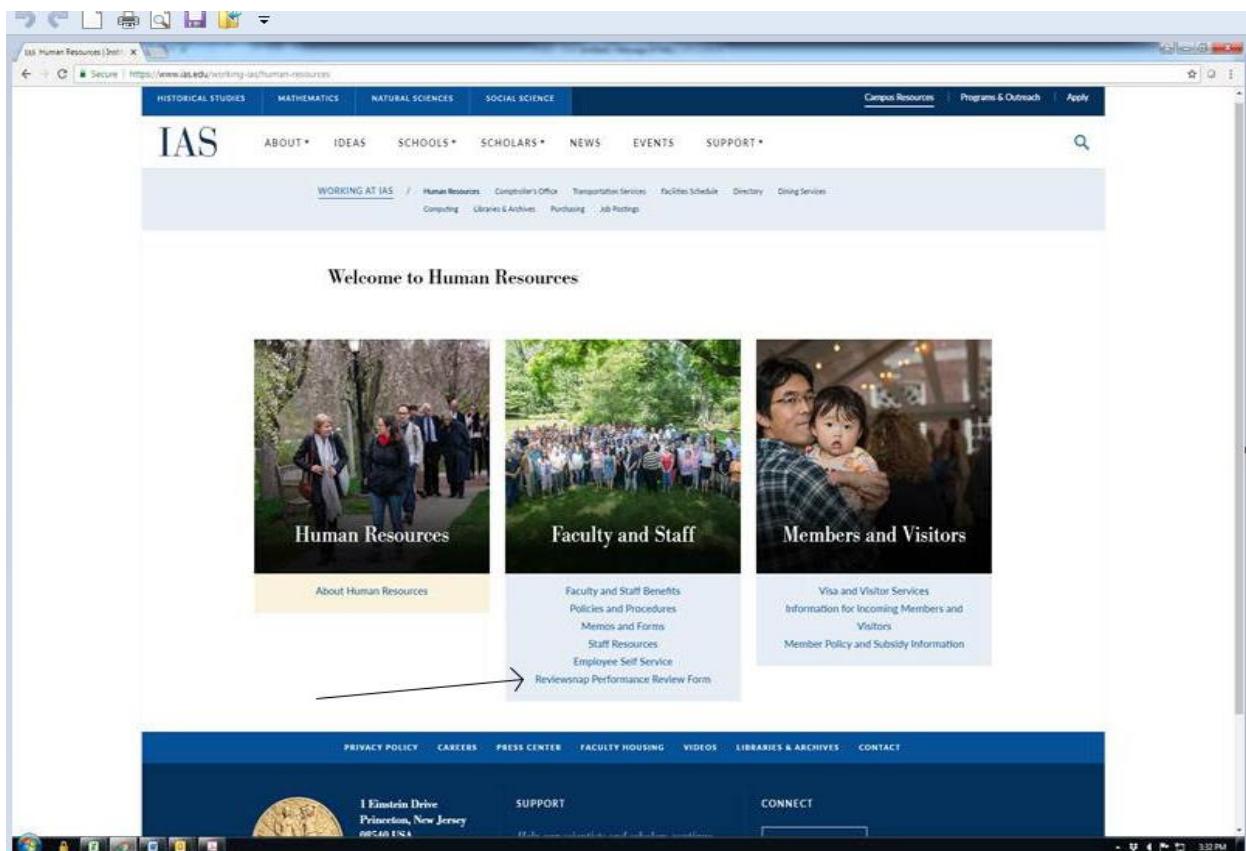
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Reviewsnap Performance Review Supervisors Guide

I. 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.

II. Adding Goals and Objectives

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.

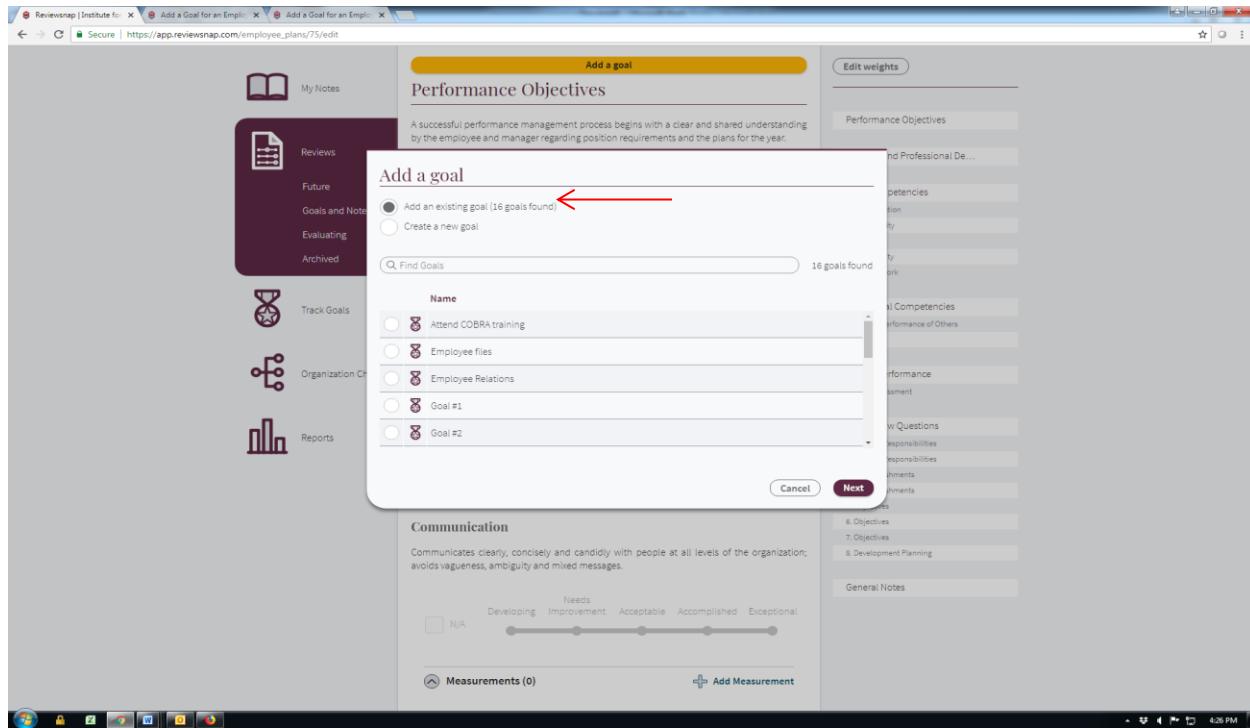
Step 1: Select the review to be edited from the home page

The screenshot shows the Reviewsnap interface. At the top, there's a navigation bar with a search bar, user info (MK Michael Klompus, ADMINISTRATOR), and links for Help, Logout, and a profile icon. Below the header is the IAS logo and a message: "Welcome to Reviewsnap! Welcome to Reviewsnap, we're glad you're here! You are welcome to watch a tutorial on how to use this system [here](#). If you have additional questions about how to use the system, please feel free to visit our [Support Site](#) or reach out to your internal administrator." On the left, a sidebar menu includes Home, My Notes, Reviews, Track Goals, and Organization Chart. The main area is titled "My Reviews" and shows a "Current Review" card with details: DUE 5/17/2019, PERIOD 7/1/2018 - 6/30/2019, and a "View Review" button. Below this is a section for "Direct Reports (4)" with four entries: Jennifer Hansen (Immigration Specialist) and Beatrice Jessen (Benefits Specialist), both with status "Set Goals" and due dates of 5/17/2019. A red arrow points to the "Direct Reports (4)" link.

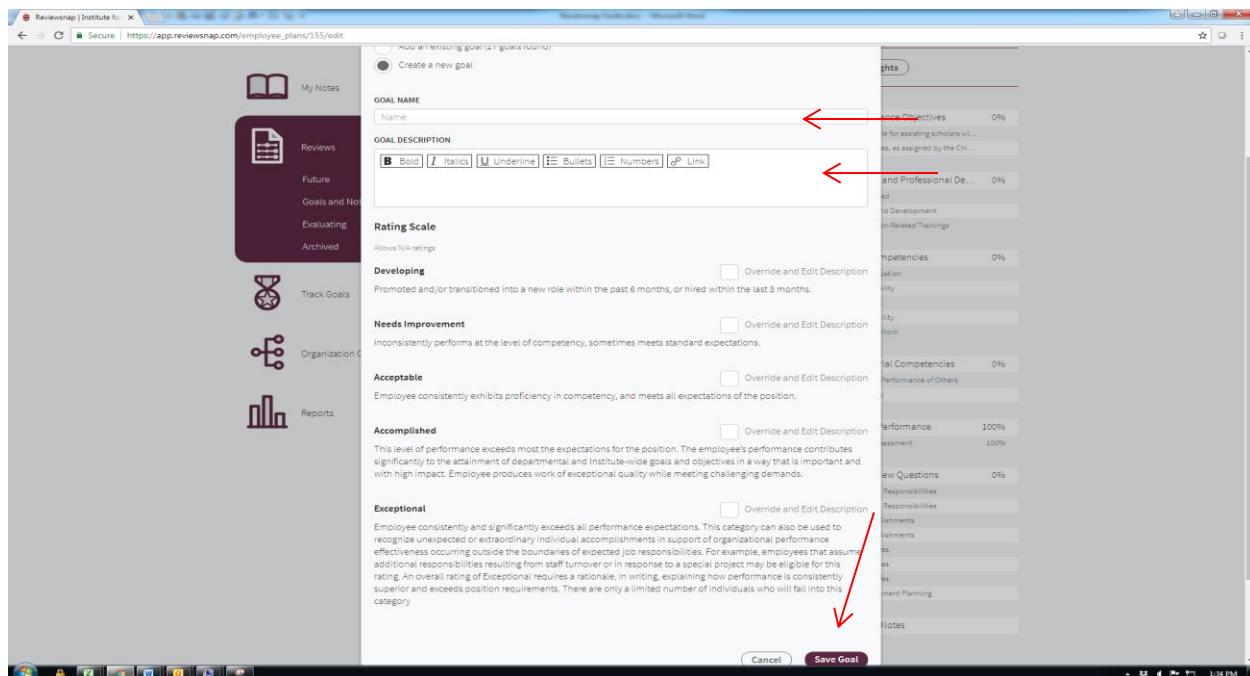
Step 2: When the review form appears, click **Add a Goal** at the top of the page.

The screenshot shows the "Add a Goal" page. At the top, there's a header "Add a goal" with a yellow background. To the right is a "Edit weights" button. The main content area is titled "Performance Objectives". It contains a detailed description of what performance management involves and instructions for adding objectives. A red arrow points to the "Add a goal" button. To the right of the main content are several sidebar sections: "Performance Objectives", "Training and Professional Development", "Core Competencies", "Communication", "Needs" (a scale from N/A to Exceptional), "Measurements (0)", "Add Measurement", "Self-Review Questions", and "General Notes". On the far left, a sidebar menu lists: My Notes, Reviews (with sub-options Future, Goals and Notes, Evaluating, Archived), Track Goals, Organization Chart, and Reports.

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

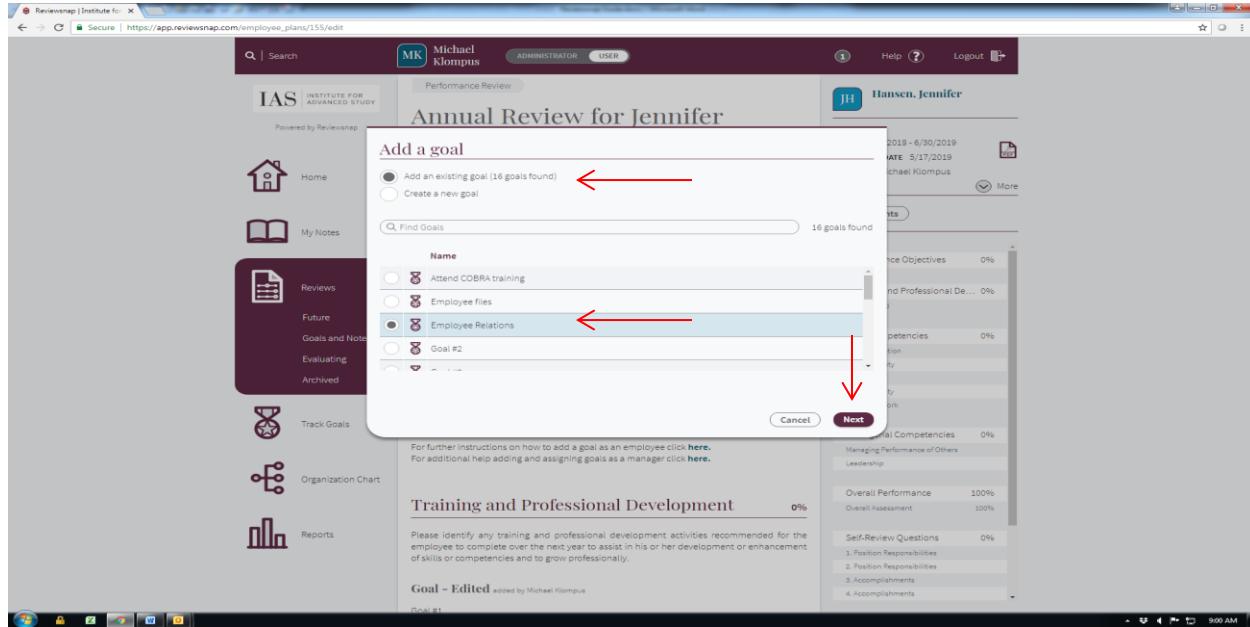


If you choose to **Create a New Goal**, fill in the **Name** and **Description** fields for the goal. When finished, click **Save Goal**.



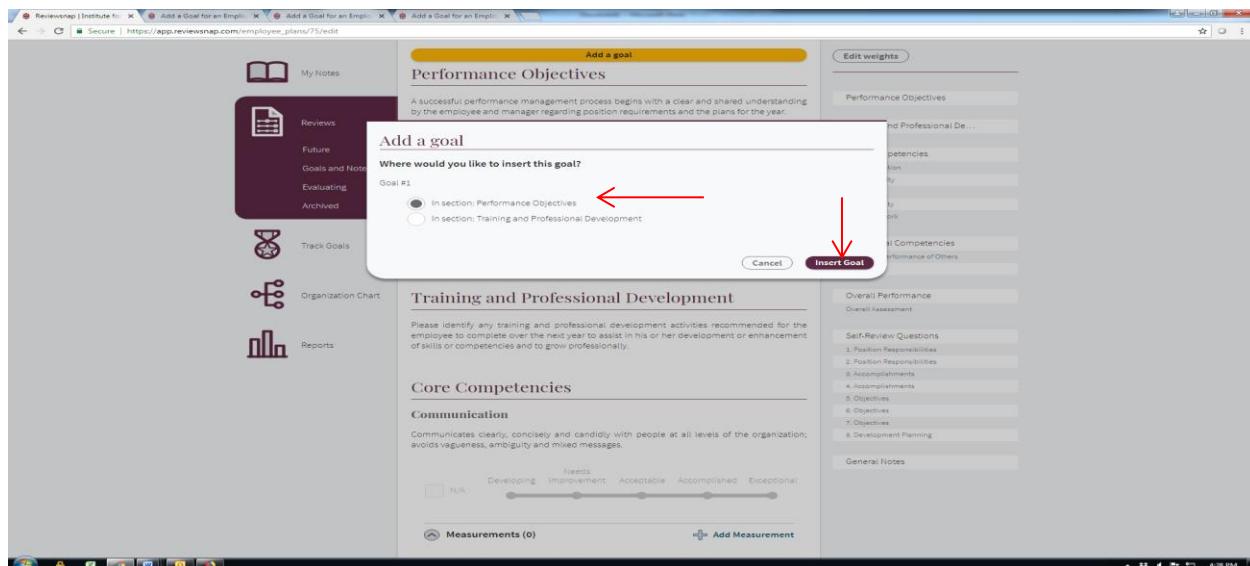
You will then be asked whether you want to add the goal to **Program Objectives or Training and Professional Development**. Please refer to Step 4 on the following page for additional instructions.

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.

III. Editing a Goal or Objective

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

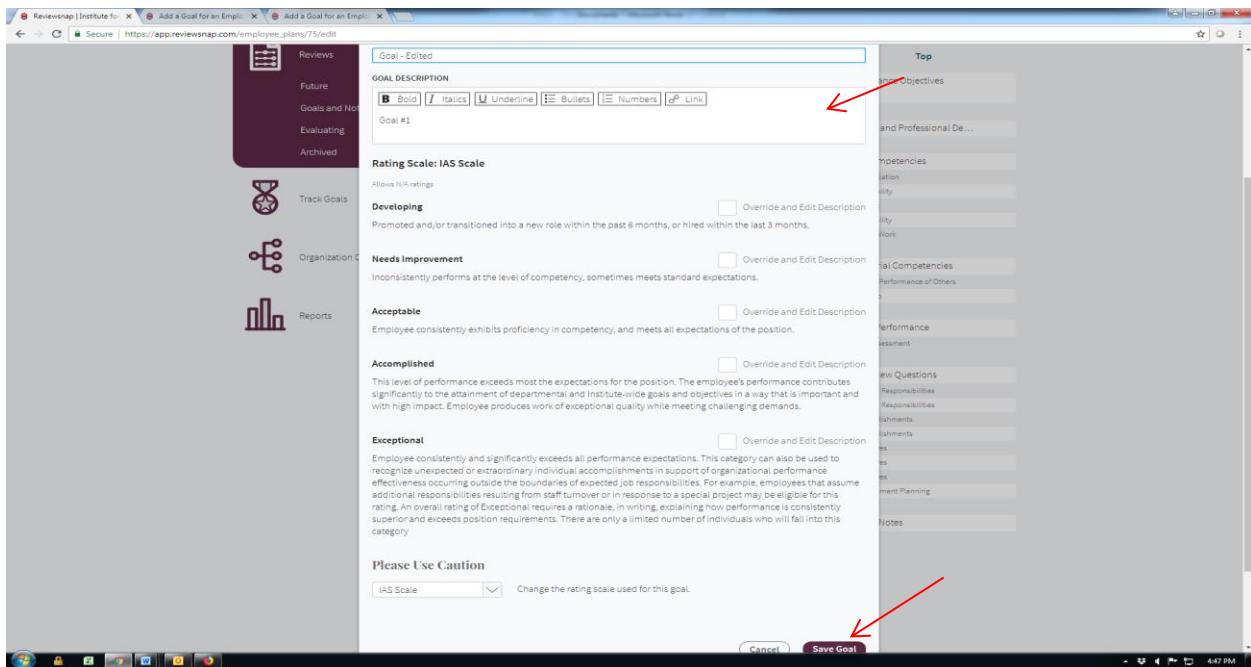
Step 1: Place the cursor over the goal, and select the **Edit** icon

The screenshot shows a web-based application for managing employee goals. On the left, a sidebar menu includes 'Reviews', 'Future', 'Goals and Notes' (which is selected), 'Evaluating', and 'Archived'. Below the menu are icons for 'Track Goals', 'Organization Chart', and 'Reports'. The main content area has a title 'Add a goal' with a sub-instruction about individual goals. It shows a goal card for 'Goal #1' created by Michael Klopman. The goal has a status of 'Needs Improvement' on a scale from 'Developing' to 'Exceptional'. There are sections for 'Measurements (0)' and 'Notes (0)'. To the right, a sidebar titled 'Top' lists various performance categories like 'Performance Objectives', 'Core Competencies', 'Managerial Competencies', 'Overall Performance', 'Self-Review Questions', and 'General Notes'. A red arrow points to the edit icon (pencil) next to the goal card.

Step 2: Select **Edit This Goal**

This screenshot shows the 'Editing: Goal #1' dialog box overlaid on the main interface. The dialog contains the goal details and a red arrow points to the 'Edit this goal' button. The main interface background remains the same as the previous screenshot, showing the goal card and the sidebar with performance categories.

Step 3: Input any changes to the goal name and/or description, and then select **Save Goal**

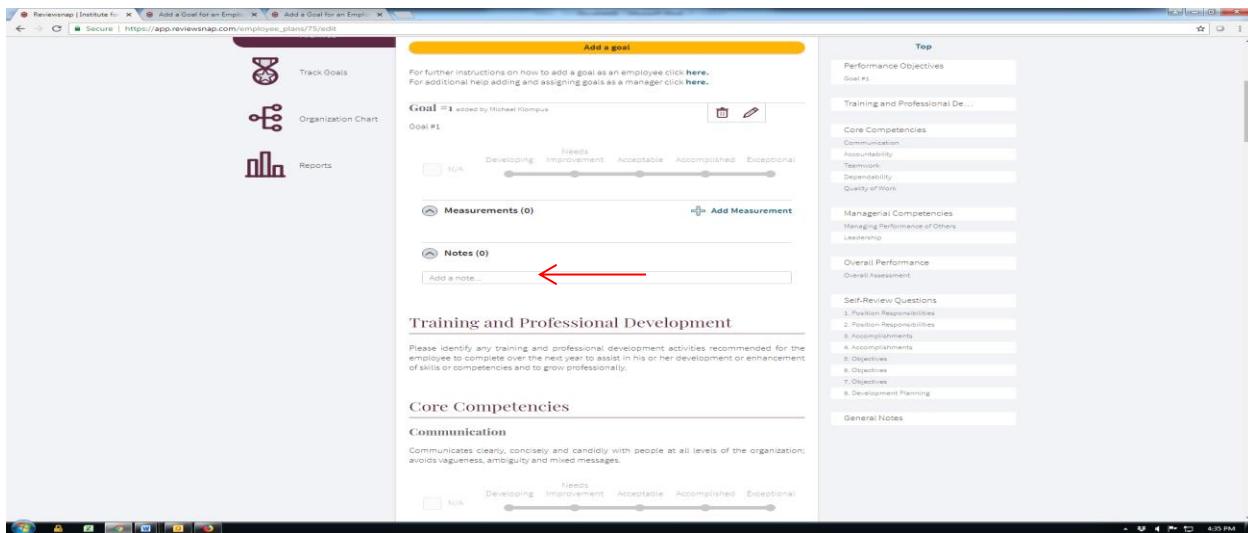


IV. Taking Notes in Your Performance Review

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.

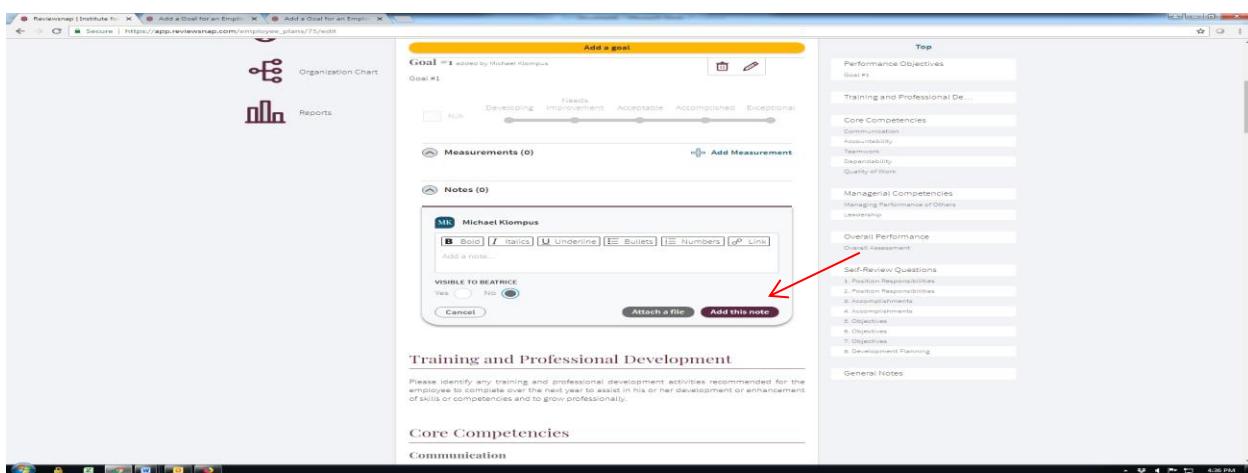
Option #1 allows you to add notes related to a specific performance-related objective:

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



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 supervisor/direct report, or to keep the note private so only you have access.

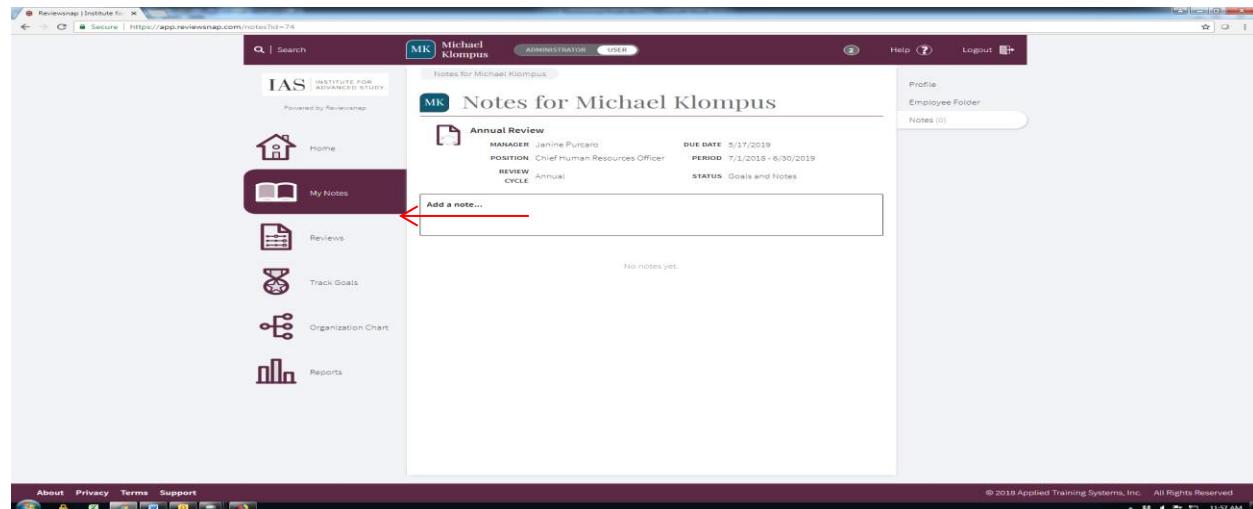


Once completed, select **Add This Note** or **Attach a File**

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.

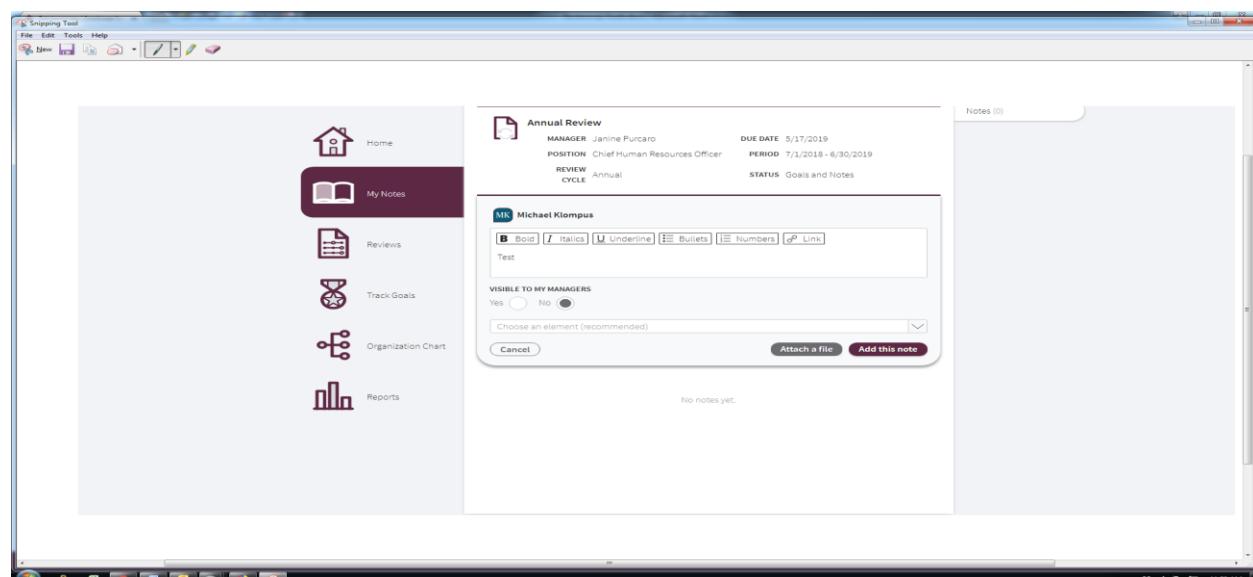
Option #2 allows you to add a more general note that is not related to any specific performance-related objectives

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 supervisor/direct report, or to keep the note private so only you have access.



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