

Performance Planning Staff

Employee Training Sessions

July 2017



Performance Planning for Staff

- Purpose
- Process
- Training (Today's session!)
- Using the Review Snap Performance System
- Questions



Purpose

- Provides feedback (positive and negative)
- Provides documentation of performance
- Provides recognition of work product
- Identifies areas for remedial training
- Improves employee morale
- Clarifies duties and responsibilities
- Best practice
- Required by CBU policy



Review Process

- Review periods
 - 90 Day Probationary for New Hires
 - Annual Reviews are based upon academic school year (August 1 to July 31)
 - Probation – To correct performance and establish targets
- Determine type of review (Templates)
 - Hourly
 - Managerial - Exempt
 - Non-Managerial/Administrative/Coaches



Review Process (Continued)

- Position duties and responsibilities (based on current job description)
- Competencies
- University goals
- Departmental goals
- Personal goals
- Overall Comments
 - Overall Comments
 - Reviewer's Supervisor Comments
 - Development Plan
 - Employee Comments
- Rating scale - 6 levels



Review Process (Continued)

CBU Rating Scale (Exempt & Non-exempt):

- 0 - Not Ratable (NR) - Employee too new to be rated or behavior not observed.
- 1 - Unsatisfactory (U) - Performance clearly does not meet several expectations.
- 2 - Needs Development (ND) - Performance does not meet one or more expectations.
- 3 - Meets Expectations (ME) - Performance meets expectations consistently.
- 4 - Exceeds Expectations (EE) - Performance regularly exceeds expectations.
- 5 - Outstanding (O) - Performance significantly exceeds expectations on a consistent basis.



Review Process (Continued)

CBU Rating Scale (Hourly):

- 0 - Not Applicable (N/A) - Does not apply to this employee and no rating assigned.
- 1 - Poor (P) - Rarely or never achieves listed behavior.
- 2 - Fair (F) - Occasionally achieves listed behavior.
- 3 - Average (A) - Usually achieves listed behavior.
- 4 - Good (G) - Achieves listed behavior.
- 5 - Excellent (E) - Always achieves or exceeds listed behavior.



Employee Access

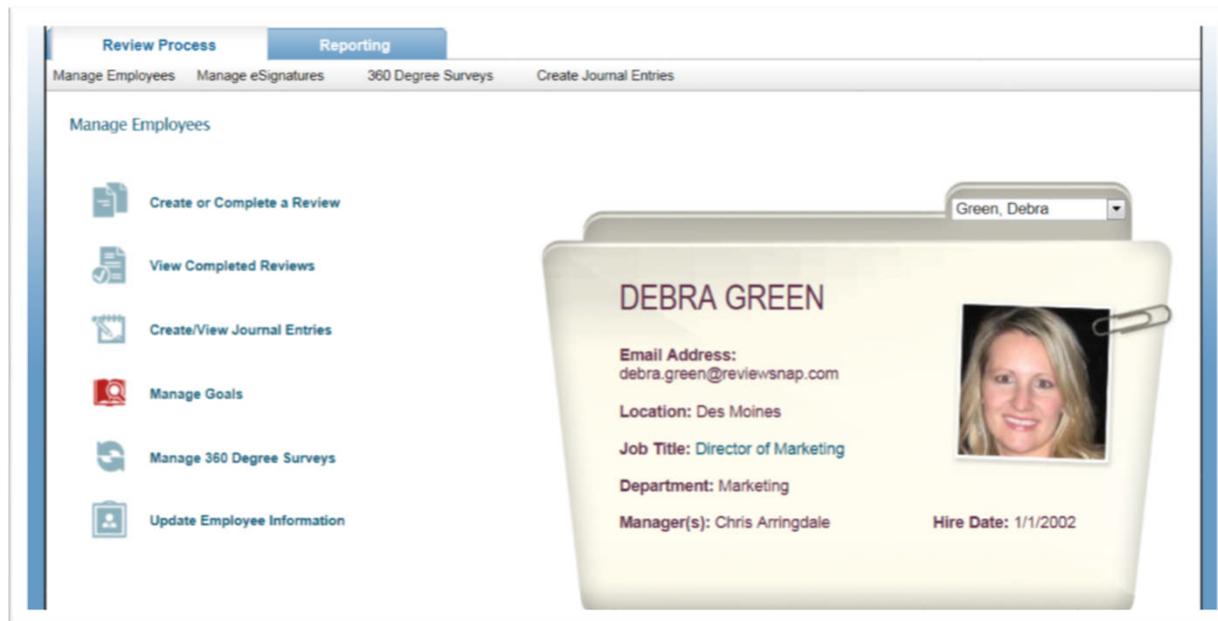
- Manage Reviews
 - Complete Self-Reviews
 - View completed supervisor's reviews
 - Make comments on supervisor's review
 - Electronically sign reviews
- Create/View Journal Entries
- Manage Goals
- Update Passwords



Manage Employees



- This section is where you spend almost all of your time when logged in the performance management system.
- You will complete reviews, manage goals, and journal entries from the Manage Employees section.
- You will also be able to view past reviews that were completed within the performance management system at any time.



Create or Complete a Review

- To complete a review select the necessary employee from the drop down menu and then click on the Create or Complete a Review link.
- Next, select the correct review period for which you are doing the review and click Continue.



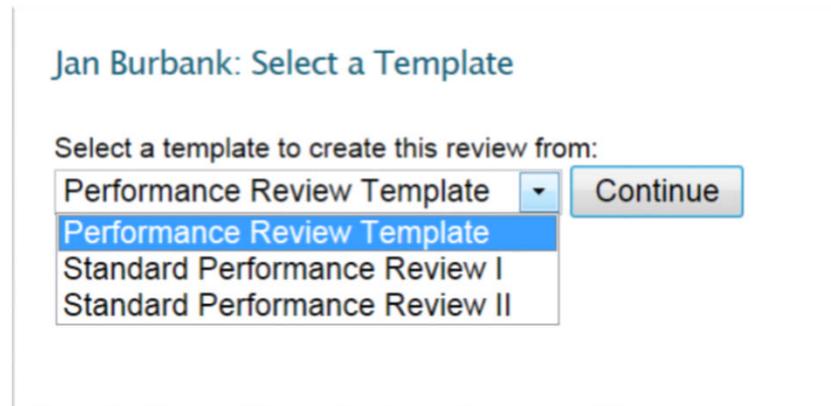
Jan Burbank: Create a New Review

Select an available review period to create the review for.

Annual Review Period (1/1/2010 - 12/31/2010)

[Back to Manage Employees](#)

- On the next page select the correct template from the drop down menu and click Continue.



Jan Burbank: Select a Template

Select a template to create this review from:

Performance Review Template

- Performance Review Template
- Standard Performance Review I
- Standard Performance Review II

Continued

Create or Complete a Review

- After selecting your review period and template look over the information you have selected to make sure everything is correct and then click Continue to start the review.

Employee: Burbank, Jan (jan.burbank@reviewsnap.com)
Review Period: 1/1/2010 - 12/31/2010
Template Name: Performance Review Template

- Once you have started the review you will begin by rating and leaving comments on the competencies selected by your Administrator for the template.

an Burbank: Answer Competencies

Accountability/Responsibility

Product Knowledge

Scale Legend

Not Observed (NO): Employee too new to firm or not applicable to employee.

Far Below Standards (FBS): Performance clearly does not meet expectations – corrective action necessary.

Below Standards (BS): Performance does not consistently meet expectations.

Meets Standards (MS): Performance meets expectations consistently.

Exceeds Standards (ES): Performance often exceeds expectations.

Far Above Standards (FAS): Performance significantly above expectations.

Competency Description	NO	FBS	BS	MS	ES	FAS
Has strong knowledge of our company products	○	○	○	○	●	○

Comments/Suggestions:

Jan has worked very hard to better understand our company products.

Create or Complete a Review

- After rating and leaving comments on the competencies on section 1 click Continue to save your progress on the review and move on to the next section. At any point during the review you can click Save Only or Save and Exit to save your progress and get out of the review.
- After finishing section 1 you will move on to section 2 called Review of Progress in Meeting Goals. Here you will rate and leave comments on the current years goals that were entered into the Manage Goals section for this employee.

Jan Burbank: Review of Progress in Meeting Goals

Scale Legend

Not Observed (NO): Employee too new to firm or not applicable to employee.

Far Below Standards (FBS): Performance clearly does not meet expectations – corrective action necessary.

Below Standards (BS): Performance does not consistently meet expectations.

Meets Standards (MS): Performance meets expectations consistently.

Exceeds Standards (ES): Performance often exceeds expectations.

Far Above Standards (FAS): Performance significantly above expectations.

Company

Individual

Goal Description	NO	FBS	BS	MS	ES	FAS
Have a strong knowledge and understanding of the roles and responsibilities of her job.					<input checked="" type="radio"/>	
Make sure that all departments and employees are following procedures established by human resources					<input checked="" type="radio"/>	

Comments:

Jan has a very strong understanding of the roles and responsibilities of her job and always goes above and beyond to help others out.

Create or Complete a Review

- After rating and leaving comments on the current year's goals on section 2 and clicking Continue you will go to section 3 called "Performance Plan for Upcoming Review Period – List of Goals". This section gives you the opportunity to add goals in for the employee for the next review period.
- It is not required that you entered goals at this time, but whatever goals you enter will be populated into the Manage Goals section for you to manage and edit throughout the year.
- If it is not part your review process to add goals in during the review section 3 may be removed by your Administrator.

Jan Burbank: Performance Plan for Upcoming Review Period - List of Goals ▾

Create a Goal

Goal Name	Weighting	Due Date	Actions	Category
Needs to have strong public speaking skills and be able to lead meetings wi...	60%	12/31/2011	Pay close attention to how you handle all situations with your employees	Development Update Delete
Have a strong understanding of compensation and benefits...	40%	12/31/2011	Spend more time doing OTJ training regarding compensation and benefits. She also needs to participate in learning courses on these topics.	Development Update Delete
Totals	100%			

[Previous](#) [Next](#) [Save and Exit](#)

Manage Goals

- The Manage Goals page is where you will add and update individual goals for your employees.
- The goals that you enter for an employee will automatically be pulled onto the review to be rated.
- You will need to make sure and enter the goals for the correct review period.
- If you add goals to section 3 of your review, those goals will automatically be populated into the Manage Goals section for you to manage throughout the year.
- If your organization chooses to allow your employees to manage their own goals you will have the ability to lock an employee's goals down as well. Once you lock the goals down you will still be able to Add and Update goals for that employee, but the employee will only be able to view the goals, but not make any additions or changes.

Manage Goals (Continued)

- To add or manage an employees goals select the necessary employee from the drop down menu on the Manage Employees page and then click the Manage Goals link.
- On the next page select the correct drop down menu and then click “Add a Goal”. To make changes to existing goals just click “Update” next to that goal.
- When adding a goal you will first select the correct category the goals fall under. If you don’t see a drop down menu for the categories that means that no categories were created by your Administrator.
- Next, assign the weighting to your goals. You will only need to do this if you see the “Goal Weighting Percentage” box. If you do see that box you will need to make sure that the sum of all goals equals 100%.
- In the Goal Description box is where you put the goal.
- If you have a numeric goal you can put that in the “Quantitative Goal” field and put the number you have achieved so far in the “Current Level” field.
- If you do not have any quantitative goals you can ignore those two fields as well as the “Smaller Current Level Value is Better” checkbox.

Continued

Manage Goals (Continued)

- Next, enter a date that you want this goal achieved by in the “Due Date” field.
- If this is an ongoing goal for the employee check the “Allow Rollover to Next Review Period.” checkbox. This will save you the time of having to re-enter the goal for the next review period.
- If the employee has already started working on the goal you change the status.
- In the “Actions” box enter any action items or action plan the employee will need to follow to achieve the goal.

Administration | **Review Process** | Review Setup | Reporting

Manage Employees | Manage eSignatures | 360 Degree Surveys | Create Journal Entries

Review Period: Annual Review Period - 1/1/2010 - 12/31/2010

Jan Burbank: Manage Goals

[Add a Goal](#) [Print Goals](#)

Goal Name	Weighting	Due Date	Status	Progress	Category	
Implement Reviewsnap Performance Management System by next review cycle.	30%	11/1/2012	On Target	N/A	Company	Update Delete
Make sure that all departments and employees are following procedures established by human resources	20%	Ongoing	Moderately ahead of schedule	N/A	Individual	Update Delete
Have a strong knowledge and understanding of the roles and responsibilities of her job.	30%	12/31/2010	Significantly ahead of schedule	N/A	Individual	Update Delete
Gain a better understanding of benefits and compensation	20%	12/31/2010	On Target	N/A	Development	Update Delete
Totals	100%					

[Lock All Current Goals](#) [UnLock All Current Goals](#)

Manage Goals

Category: **None** ▾

Weighting Percentage:

Goal Description: 

Quantitative Goal:

Current Level:

Smaller Current Level Value is Better.

Due Date:

Allow Rollover to next Review Period.

Status: **On Target** ▾

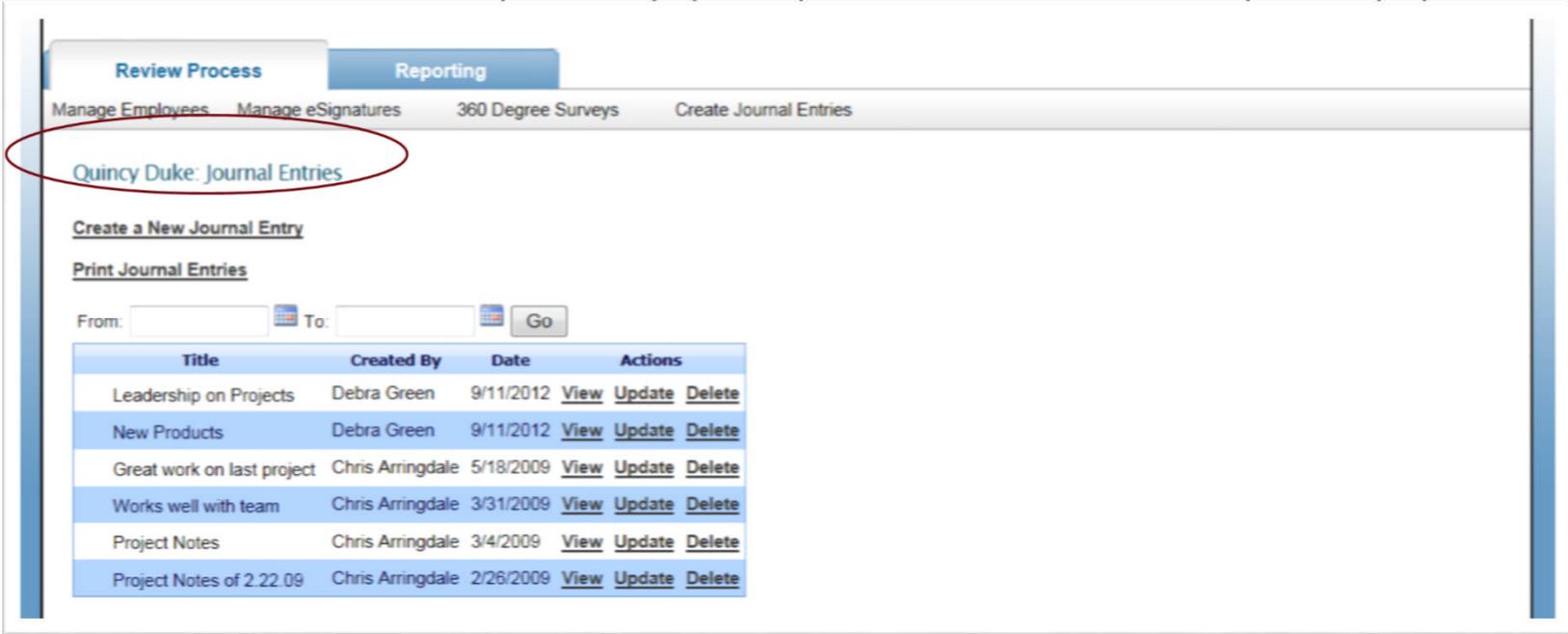
Actions: 

Creating and Viewing Journal Entries

- The journal entries tool allows you to leave comments/notes on an employee at any time throughout the year.
- You will want to leave a journal entry on an employee any time they have done something that reflects their performance, whether it's positive or negative.
- Using the journal entries tool will help you give a more accurate review along with streamlining the review process.
- It is meant to be used as a reference tool, so you can see how the employee performed throughout the year, rather than basing their review on events that you recall from the last few months.
- You will be able to attach documents to the journal entries as well such as disciplinary documentation, past reviews, emails with feedback from colleagues, etc.

Creating and Viewing Journal Entries

- To create or view a journal click go to the Manage Employees page and select the necessary employee from the drop down menu.
- Next, click on the Create/View Journal Entries link.
- On the next page you will see a list of all journal entries you have left in the past. You can view those journal entries and update them as well.

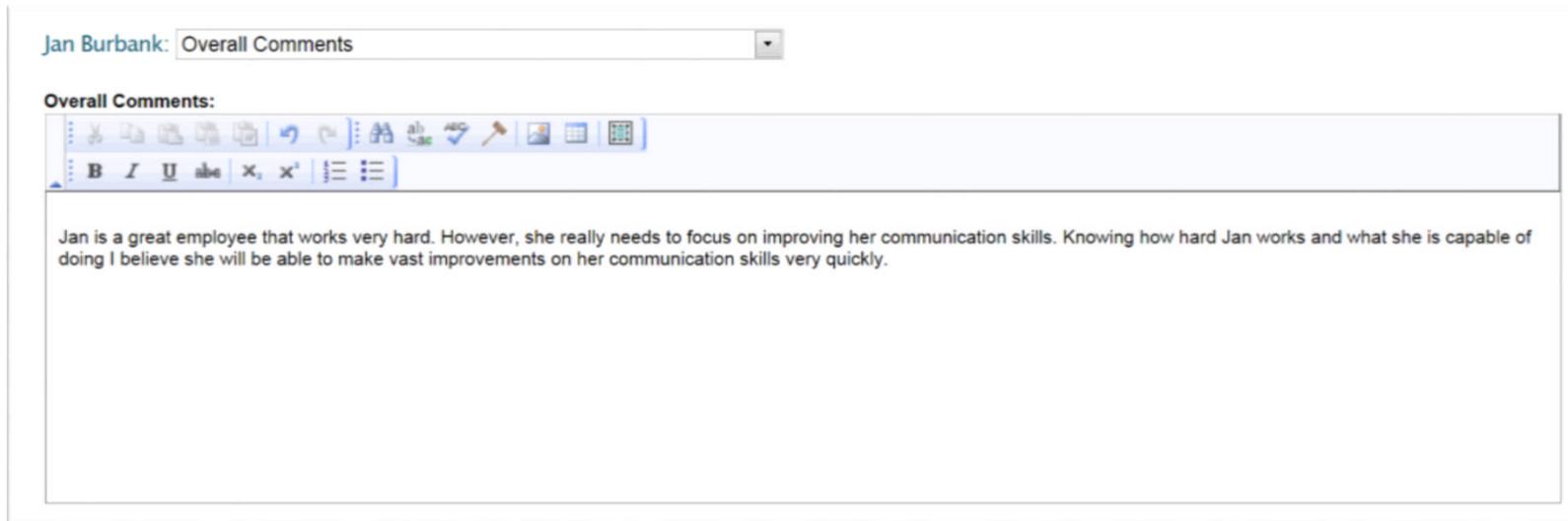


The screenshot displays a web application interface with a navigation bar at the top. The navigation bar includes tabs for "Review Process" and "Reporting". Below the navigation bar, there are links for "Manage Employees", "Manage eSignatures", "360 Degree Surveys", and "Create Journal Entries". A red oval highlights the link "Quincy Duke: Journal Entries". Below the navigation bar, there are links for "Create a New Journal Entry" and "Print Journal Entries". A date range selector is present with "From:" and "To:" fields and a "Go" button. Below the date range selector is a table of journal entries.

Title	Created By	Date	Actions
Leadership on Projects	Debra Green	9/11/2012	View Update Delete
New Products	Debra Green	9/11/2012	View Update Delete
Great work on last project	Chris Arringdale	5/18/2009	View Update Delete
Works well with team	Chris Arringdale	3/31/2009	View Update Delete
Project Notes	Chris Arringdale	3/4/2009	View Update Delete
Project Notes of 2.22.09	Chris Arringdale	2/26/2009	View Update Delete

Create or Complete a Review

- Once you are done with section 3 and move on to section 4, the Overall Comments section, you will see open boxes for you enter overall comments on the employee.



The screenshot shows a web interface for entering overall comments. At the top, there is a dropdown menu with the name "Jan Burbank" and the label "Overall Comments". Below this is a section titled "Overall Comments:" which contains a rich text editor. The editor has a toolbar with various icons for text formatting and insertion. The text entered in the editor reads: "Jan is a great employee that works very hard. However, she really needs to focus on improving her communication skills. Knowing how hard Jan works and what she is capable of doing I believe she will be able to make vast improvements on her communication skills very quickly."

- After entering your overall comments and clicking Continue you will be able to begin the signature process by clicking on the “Click here to mark this review ready for signatures” link.

Complete a Review - Supervisor

- Once you have marked the review ready for signatures you will see a list of other managers that you can choose from to have sign-off on the review as well.
- If you do choose other managers to sign-off you can click Submit and re-sort the order in which you and the other managers will sign-off on the review.
- After you are done re-sorting the order of managers signing off, if you do so, it is time to view the review in a PDF and sign-off.

Reviewer	Actions
Arringdale, Chris	View Reviewers Comments Signatures Continue

- To see the review in a PDF click the View link you see in the picture above and to sign-off on the review you will click the Signatures link. On the next page you will see an open box next to your name. Type in your name and click the Sign button.

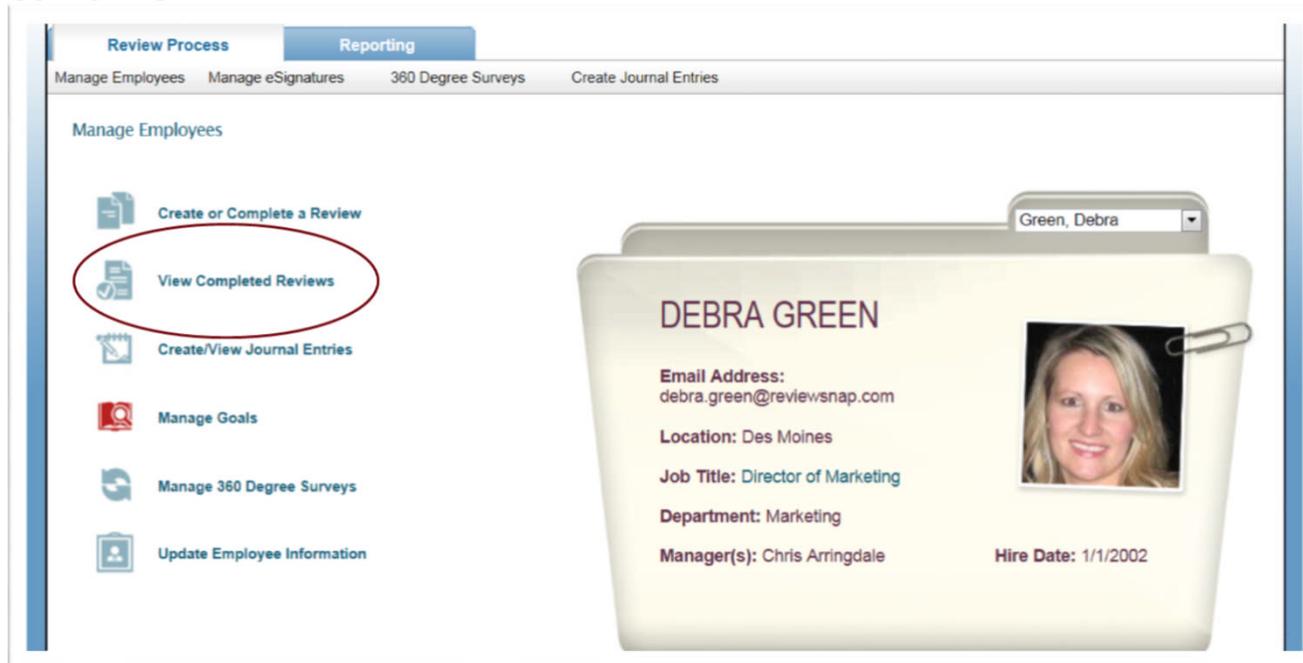
eSignature for Review

Review Period: 1/1/2010 - 12/31/2010

Type	Name	Signature	Date
Manager	Chris Arringdale	<input type="text"/> <input type="button" value="Sign"/>	9/11/2012
Employee	Jan Burbank	not signed	
HR	David Lee	not signed	

Complete a Review - Supervisor

- After you have signed off on the review it will automatically be routed to the next person in the sign-off order, which is selected by your Administrator.
- After all necessary parties have signed off on the review the system will automatically finalize the review and that is when it is considered complete. After that you can view the finalized review at any point by going to the Manage Employees page and clicking on the View Completed Reviews link under that employees name.



Additional Tools

- My Account
- Dashboard
- Split Screen

Additional Resources – By Request

Review Process Summary

https://rs1.reviewsnap.com/documents/reference_library_docs/ReviewSNAP-Review_Process_Summary2.pdf

Manager Training PowerPoint Presentation

https://rs1.reviewsnap.com/documents/New_Manager_Training_Presentation.pptx

Goal Management Walkthrough

https://rs1.reviewsnap.com/documents/reference_library_docs/Goal_Management.swf

Frequently Asked Questions

https://rs1.reviewsnap.com/documents/reference_library_docs/Reviewsnap_FAQs25.pdf

Review Handoff Workflow

https://rs1.reviewsnap.com/documents/reference_library_docs/Review_Handoff_Workflow2.swf

Login Email

To: Employee

Subject: Login Information for {Reviewsnap} Website

Congratulations, you are now set up as a user of the {Reviewsnap} performance review system. Your login information is shown below.

Please note that once you log in to the site at {<http://rs1.reviewsnap.com/login.cfm>}, a link to the Users Reference Guide is offered to walk you through the review process, which will appear on the Welcome page each time you log in. It is helpful in answering questions about the use of the system.

Also, {Test Administrator} (your {Reviewsnap} administrator) may be able to answer any questions you might have as you use the system. And the {Reviewsnap} support team is available during business hours at 1-800-516-5849. Thank you.

Username: {TestUsername}

Password: {TestPassword}

Questions?

