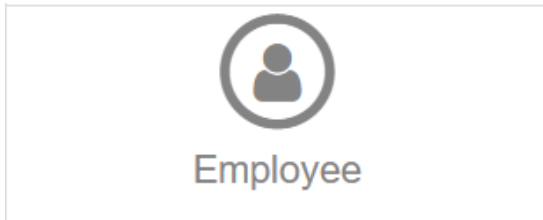
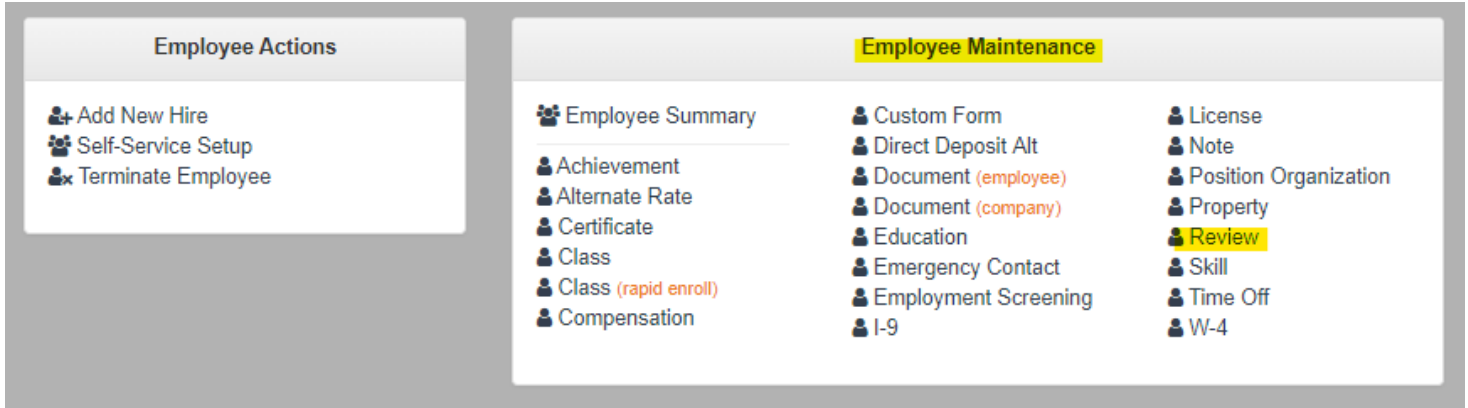


Schedule Review

From your Dashboard click on Employee



Click on Review under Employee Maintenance



Click on New

Reviews



Select the reviewer, the employee, the review type, set the status as Scheduled, click Yes if you want the employee to acknowledge that they know they are scheduled, select the date, and type the location of the review. You can add a second review by completing the Reviewer/Dates (Additional) box, but it isn't required

Save Changes Save & Next Record Close

Review: NEW RECORD

Employee Company Ginger's Pet Care (GMPC) Employee Mathevs, Chris (221)	Review Info Review Type + Self-Evaluation - Initial Self-Evaluation Status S - Scheduled Employee Acknowledged No Yes	Reviewer/Dates (Primary) Reviewer (Primary) Lynn, Kelli (220) Scheduled Date 03/21/2022 Completed Date Completed Date Review Location Online Rating Rating	Reviewer/Dates (Additional) Reviewer (Secondary) Please Choose (represents BLANK) Scheduled Date Scheduled Date Completed Date Completed Date Rating Rating
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You will see your Review Instructions and the Review Questions that you linked to this review type, and you have the option of entering private notes. Private notes can't be seen by the employee. Each of the boxes will expand to fit as much as is typed

Review Instructions

Please complete the following questions as the initial self-input part of our performance review process -

Review Questions

Please try to answer as many of the following questions as possible

Question 1

Describe your major accomplishments that have been achieved during the period covered by this review.

Enter Answer Here

Private Notes

Enter Private Notes Here

Question 2

Would you prefer to remain in your present position, or if you were to be considered for a new position in the near future (6-12) months what position(s) do you feel you would be most qualified to assume?

Enter Answer Here

Private Notes

Enter Private Notes Here

Question 3

In what areas do you see the greatest need for development and what training or experiences would meet these development needs?

Enter Answer Here

Private Notes

Enter Private Notes Here

Question 4

What are your long-range career goals and how does your employment at this company help you to reach these goals?

Enter Answer Here

Private Notes

Enter Private Notes Here

Details

Review Notes

Notes

Private Notes

Private Notes

Documents

Already Attached User Documents

Document Admin Actions

Generate New Review Summary

Browse or Drag/Drop documents

Drag & drop files here ...

Browse

Temporarily Uploaded Documents

Review: **Self-Evaluation**

Save Changes

Save & Next Record

Prev Record

Next Record

Close X

When the employee logs in, the review window will open showing the employee the scheduled review

Reviews

Reviewer	Scheduled Date	Status	Review Type
Lynn, Kelli	03/25/2022	Scheduled	Initial Self-Evaluation

If the employee goes to their My HR Dashboard, they will see the Upcoming Reviews also

My Upcoming Reviews - Matthews, Chris (221)

Date	Reviewer	Type	Acknowledge
03/25/2022	Lynn, Kelli	Self-Evaluation	

The employee will not be able to complete the review until the reviewer has completed their notes, (if any) and changed the status to In-Process by going back to the HR Dashboard and clicking on Employee/Employee Maintenance/Review

Employee Actions

- Add New Hire
- Self-Service Setup
- Terminate Employee

Employee Maintenance

- Employee Summary
- Achievement
- Alternate Rate
- Certificate
- Class
- Class (rapid enroll)
- Compensation
- Custom Form
- Direct Deposit Alt
- Document (employee)
- Document (company)
- Education
- Emergency Contact
- Employment Screening
- I-9
- License
- Note
- Position Organization
- Property
- Review**
- Skill
- Time Off
- W-4

Click on the question that you want to change from Scheduled to In-Process

	Matthews, Chris	221	Lynn, Kelli	03/25/2022	Scheduled	Initial Self-Evaluation
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Click on the dropdown arrow under status, and change it to IP – In-Process and Click Save Changes

Review Info

Review Type +
Self-Evaluation - Initial Self-Evaluation

Status
S - Scheduled

Please Choose (represents BLANK)

- S - Scheduled**
- IP - In-Process**
- EC - Employee Completed
- C - Completed
- C2 - 2nd Review Completed

When the employee logs in again, they will see that the review is In-Process

Reviews

Reviewer	Scheduled Date	Status	Review Type
Lynn, Kelli	03/25/2022	In-Process	Initial Self-Evaluation

The employee can open and complete their part of the review now, they can Save Changes and come back later to complete it or if they are done, they can click on Complete and Submit. After they click on Complete and Submit, they will not have access to edit the review

Review Questions

Please try to answer as many of the following questions as possible

Question 1

Describe your major accomplishments that have been achieved during the period covered by this review.

I haven't accomplished anything.

Question 2

Would you prefer to remain in your present position, or if you were to be considered for a new position in the near future (6-12) months) what position(s) do you feel you would be most qualified to assume?

I want to stay in my present position.

Question 3

In what areas do you see the greatest need for development and what training or experiences would meet these development needs?

I need everything.

Question 4

What are your long-range career goals and how does your employment at this company help you to reach these goals?

I don't have any long-range career goals.

[Save Changes](#) [Complete and Submit](#)

Review: Performance Appraisal

[Save Changes](#) [Save & Next Record](#) [Prev Record](#) [Next Record](#) [Close](#)

If the employee goes to My Reviews, they will see the status as Employee Completed

Reviews

Reviewer	Scheduled Date	Status	Review Type
Lynn, Kelli	03/24/2021	Employee Completed	Initial Self-Evaluation


When the reviewer logs in, they will not see the Scheduled review anymore because the employee completed and submitted their part of the review

The reviewer can complete the review by navigating to Employee Maintenance/Review

Click on the employee that you are reviewing to open the review

Reviews

[+ New](#) [Schedule Reviews to Employees](#) [Download](#)

Actions	Name	Employee ID	Reviewer	Scheduled Date	Status	Review Type
	Matthews, Chris	221	Lynn, Kelli	03/24/2021	Employee Completed	Initial Self-Evaluation

Click on the dropdown arrow and select C - Completed

Review: Self-Evaluation

Employee

Company

Employee

Review Info

Review Type +

Status

Please Choose (represents BLANK)

- S - Scheduled
- IP - In-Process
- EC - Employee Completed**
- C - Completed**
- C2 - 2nd Review Completed

Add the completion date. Adding a rating is optional

[Save Changes](#) [Save & Next Record](#) [Prev Record](#) [Next Record](#) [Close](#)

Review: Self-Evaluation

Employee

Company

Employee

Review Info

Review Type +

Status

Employee Acknowledged

Reviewer/Dates (Primary)

Reviewer (Primary)

Scheduled Date

Completed Date

Review Location

Rating

You can add Private Notes under each question/answer

Review Questions

Please try to answer as many of the following questions as possible

Question 1
Describe your major accomplishments that have been achieved during the period covered by this review.

I haven't accomplished anything.

Private Notes
Matthew has accomplished more than he thinks. He organized the kitchen to make it more efficient and it has increased productivity. ✓

Question 2
Would you prefer to remain in your present position, or if you were to be considered for a new position in the near future (6-12) months) what position(s) do you feel you would be most qualified to assume?

I want to stay in my present position.

Private Notes
Matthew should remain in his current position. ✓

Question 3
In what areas do you see the greatest need for development and what training or experiences would meet these development needs?

I need everything.

Private Notes
I will set up a training program to help Matthew feel more comfortable with his job duties. ✓

Question 4
What are your long-range career goals and how does your employment at this company help you to reach these goals?

I don't have any long-range career goals.

Private Notes
There is no right or wrong answer to this question. We are happy to have him in our company and in this position. ✓

You can also add Review Notes for the employee and Private Notes if needed

Details

Review Notes
Matthew you are a good employee. You are never late and rarely call off sick.
We will work together to setup a training plan that will help you grow.
You increased our efficiencies by the great job you did organizing the kitchen and deserve credit for that.
We are very glad to have you on our team and hope you will remain with us for many years.

Private Notes
Private Notes

Click on Generate New Review Summary to add a PDF of the questions and answers

Document Admin Actions

[Generate New Review Summary](#)


You will see the PDF is attached electronically. You can also Drag/Drop documents to add to the review, if needed.

Click Save Changes

Documents

Already Attached User Documents

These documents are already attached to this record.

Download	Filename	Size (KB)
	review summary.pdf	151

Document Admin Actions



Browse or Drag/Drop documents

Drag & drop files here ...


Temporarily Uploaded Documents

Review: **Self-Evaluation**

Now the Review will show as Completed

Reviews  

filter grid...

Actions	Name	Employee ID	Reviewer	Scheduled Date	Status	Review Type
	Mathews, Chris	221	Lynn, Kelli	03/24/2021	Completed	Initial Self-Evaluation

If you need to review the review at any time, navigate back to the employee/click on Employee Maintenance/Review and open the review