ADMIN GUIDE

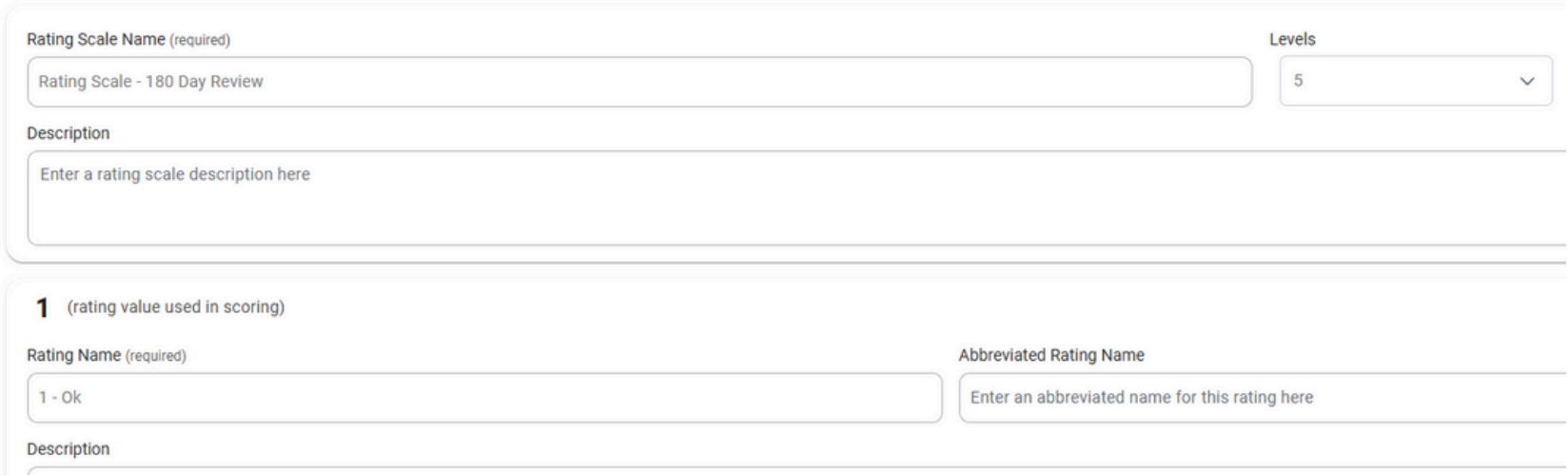
Set Up Review - 30, 60, 90 Day

Login: Computer

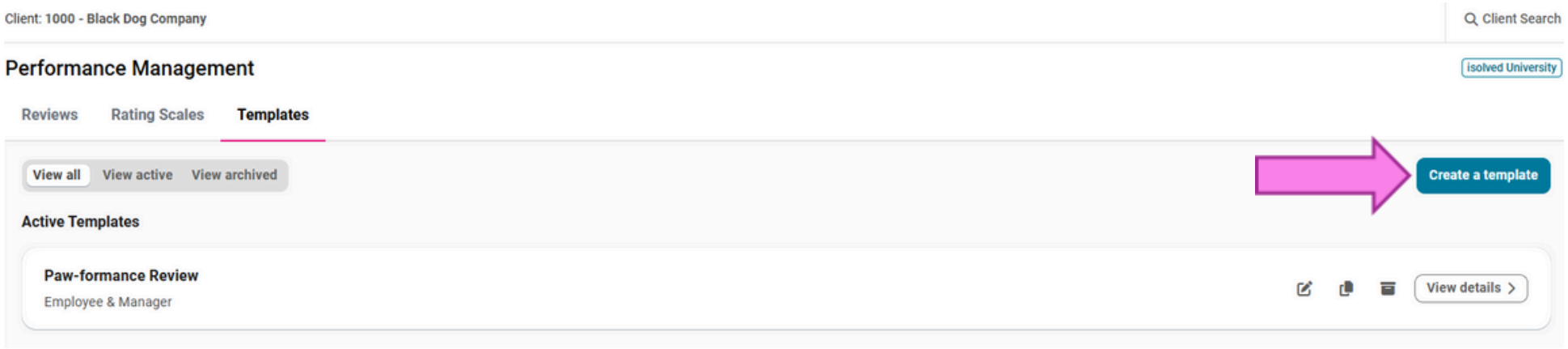
RATING SCALES: Go to Client Management > **Performance Management**. Click on the Rating Scales tab. Click Create a rating scale.



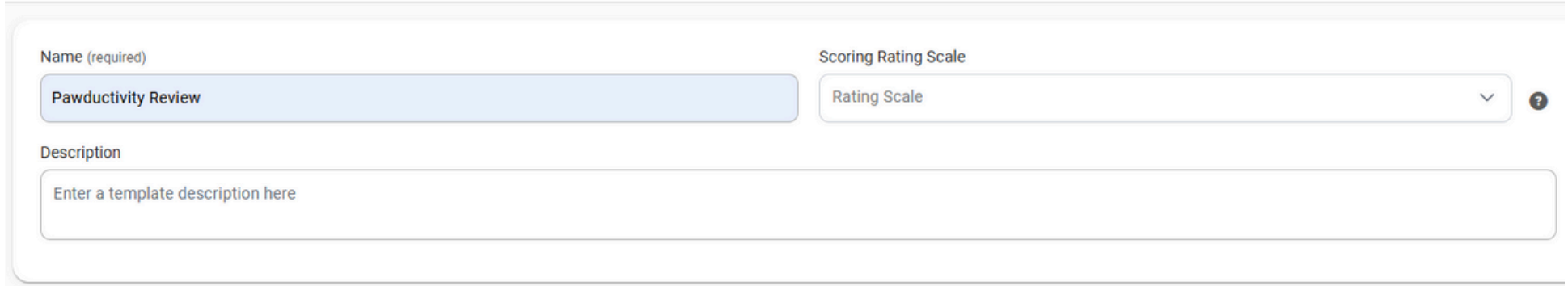
Add the name of the rating scale. Choose the number of Levels. Add the rating names. (A lower number reflects a lower rating. Example: 1- Bad, 5- Amazing)



TEMPLATES: Click on the Templates tab. Click Create a template.



Add the name of the review. Add a rating scale.



Create a Section. Choose who you would like to complete the review - the Employee, Assigned Supervisor and/or Assigned Manager. Add your questions.

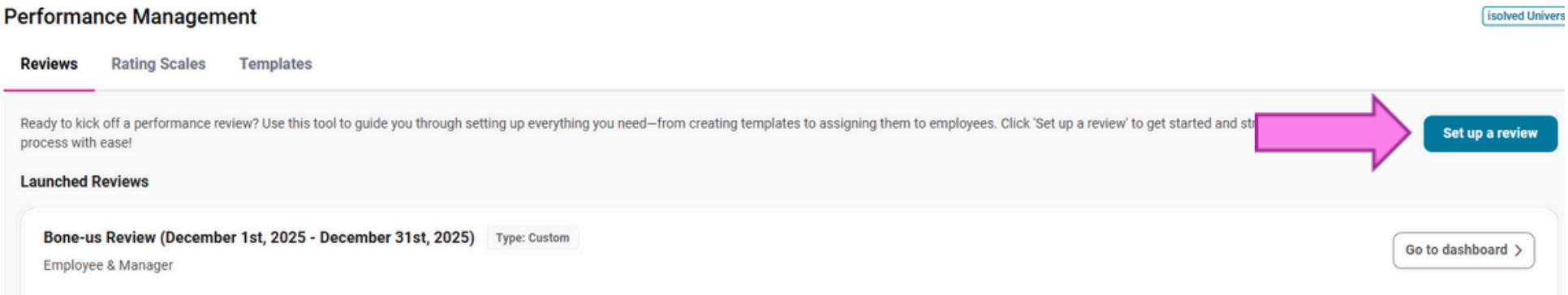
Continue to add as many Sections as you need.



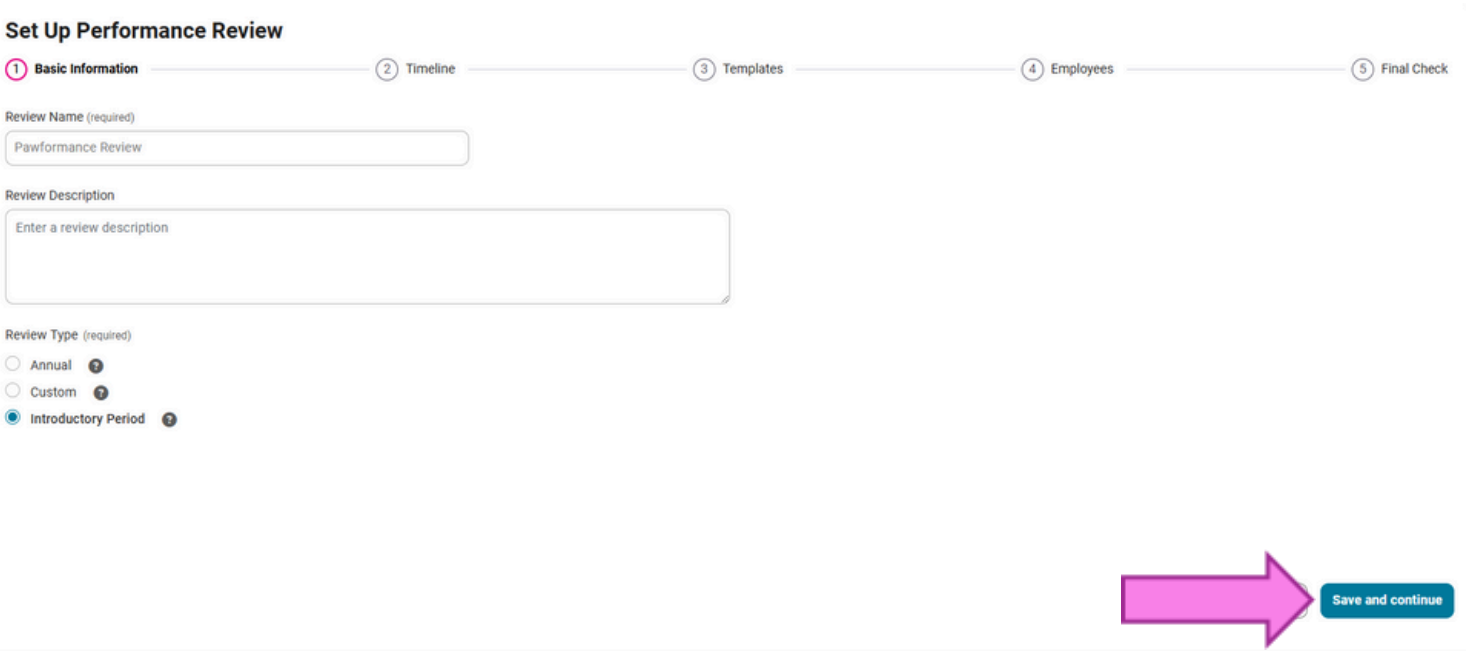
Click Create template.



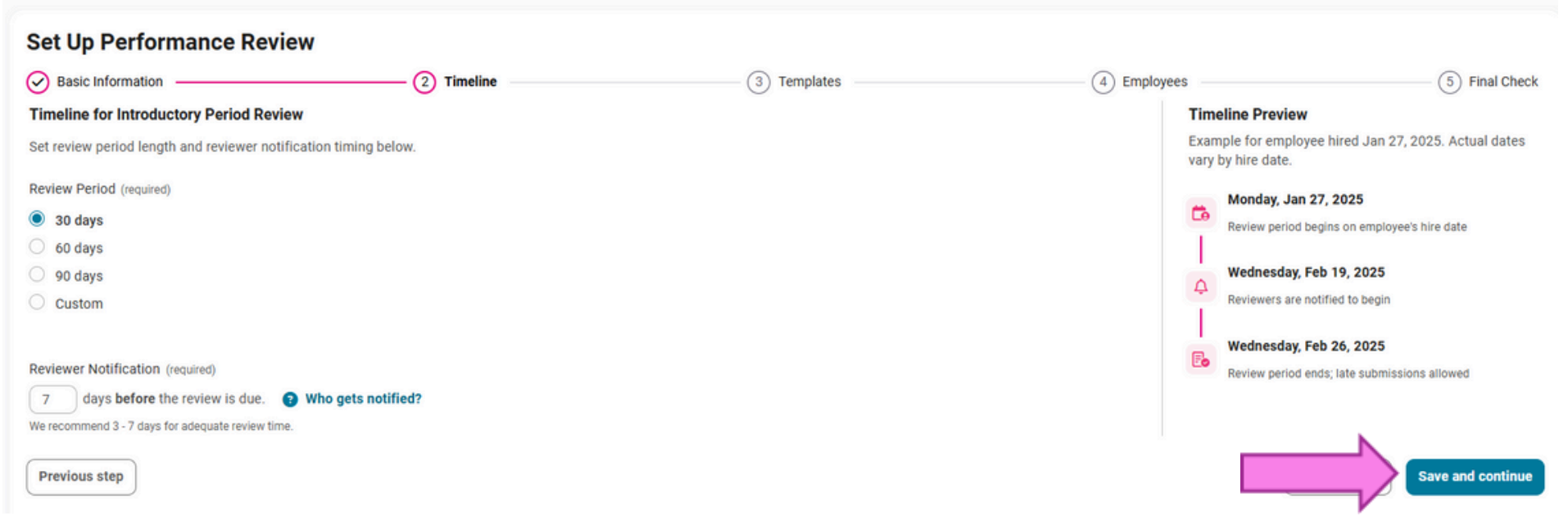
REVIEWS: Click on the Reviews tab. Click Set up a review.



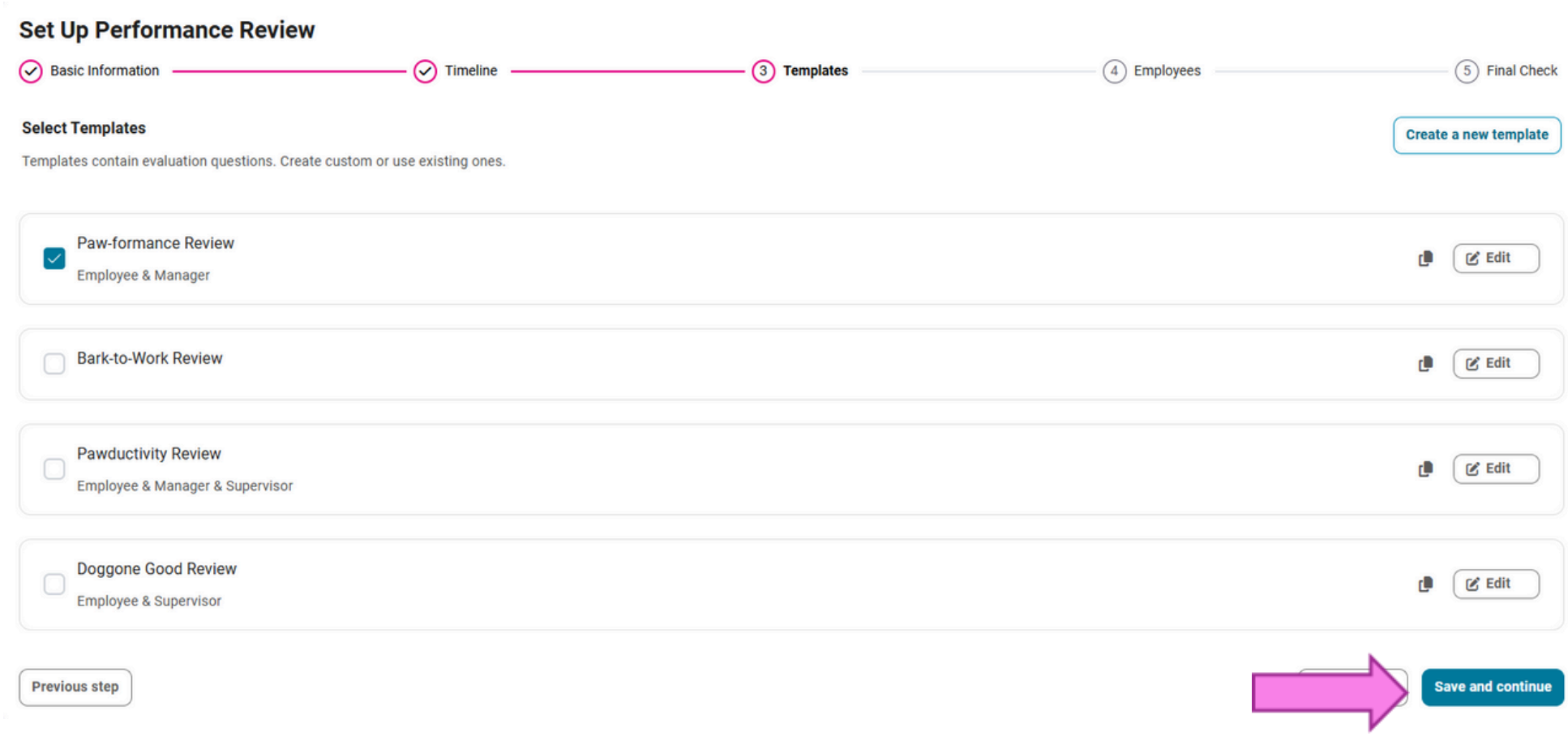
Add the name of the review. Choose Introductory Period. Clicks Save and continue.



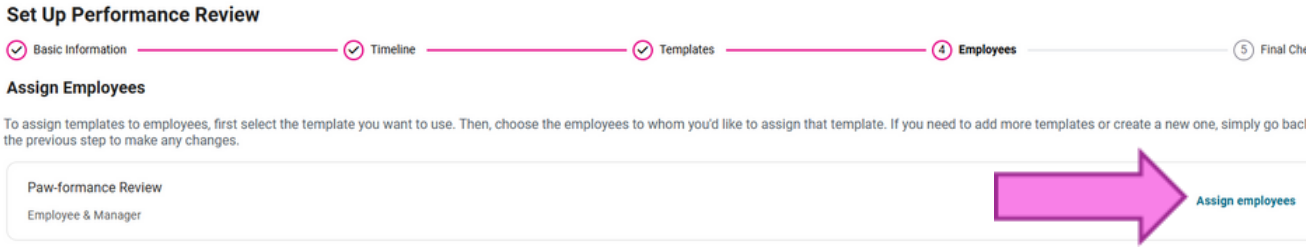
Choose 30, 60, or 90 days. Fill in the Review Notification days box. Click Save and continue.



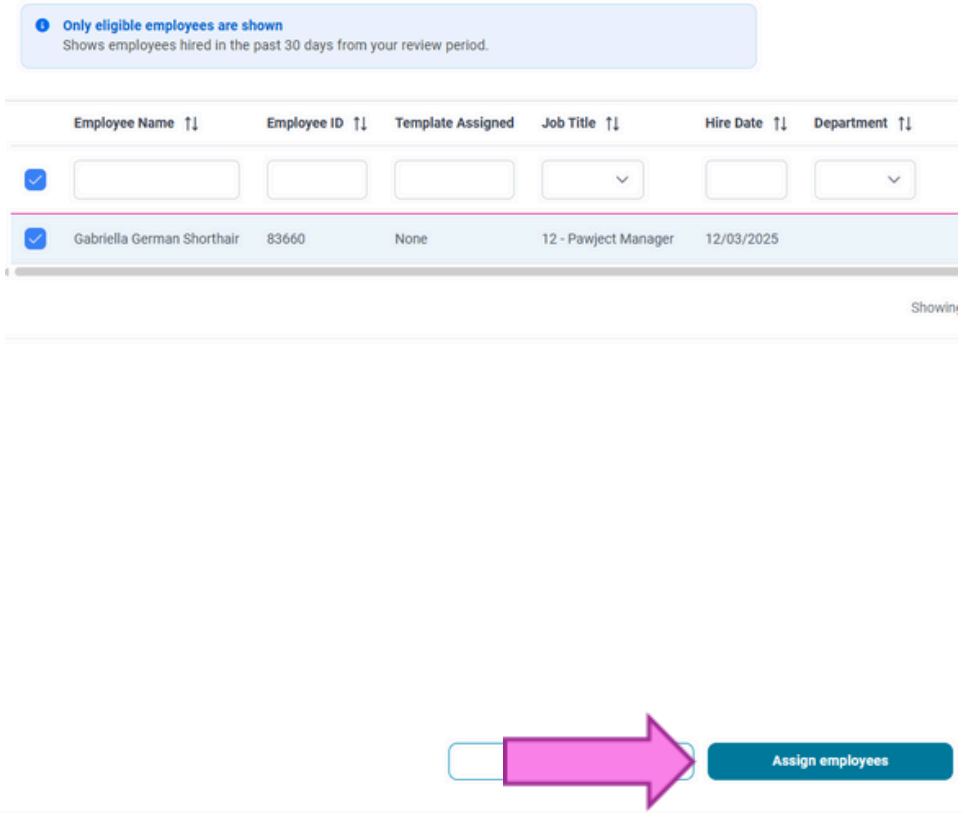
Choose the template you want to use. Click Save and continue.



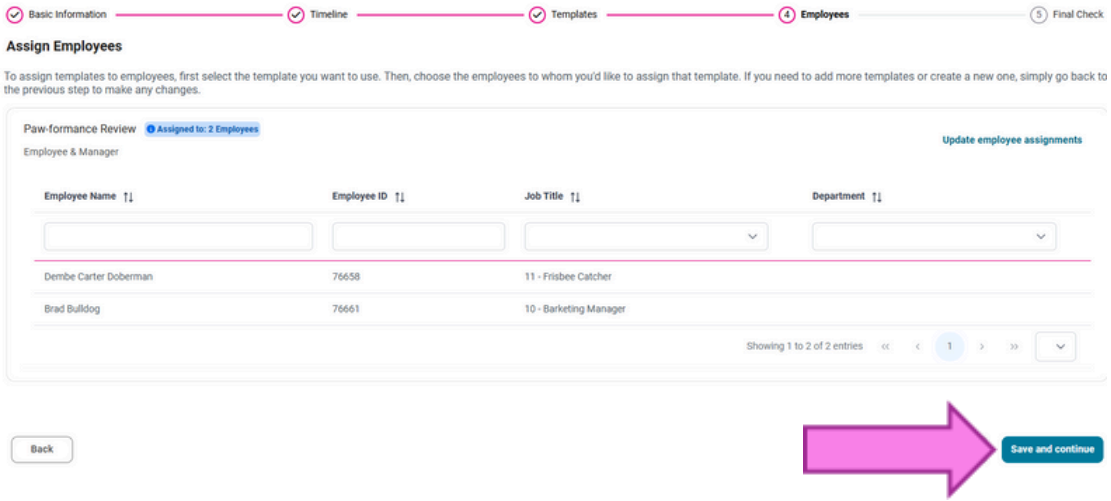
Click Assign employees. Choose the employees.



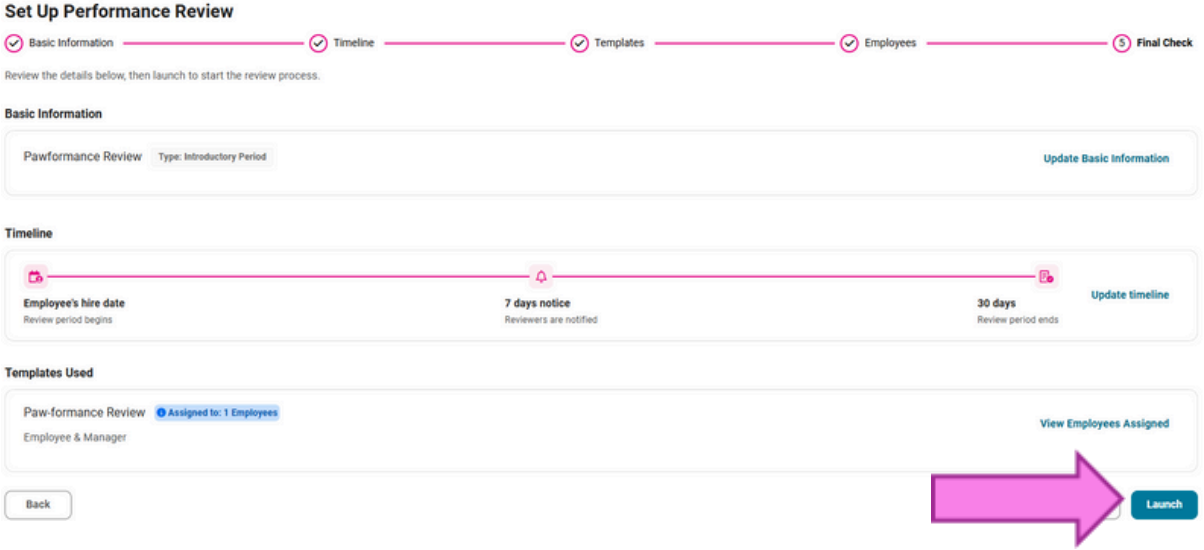
Click Assign employees.



Click Save and continue.



Click Launch. Employees and any Managers/Supervisors will receive an email letting them know to complete before the review is due.



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Service Beyond Expectation

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