User guide for the Review forms
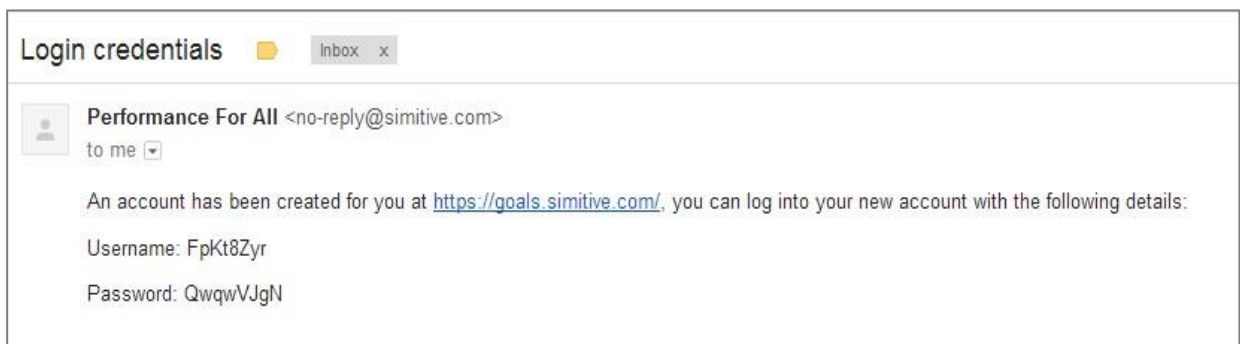
Step 1: - Turn on your Computer and log in as you usually would

Step 2: - Log onto the internet and go to the URL https://feedbackforperformance.simitive.com
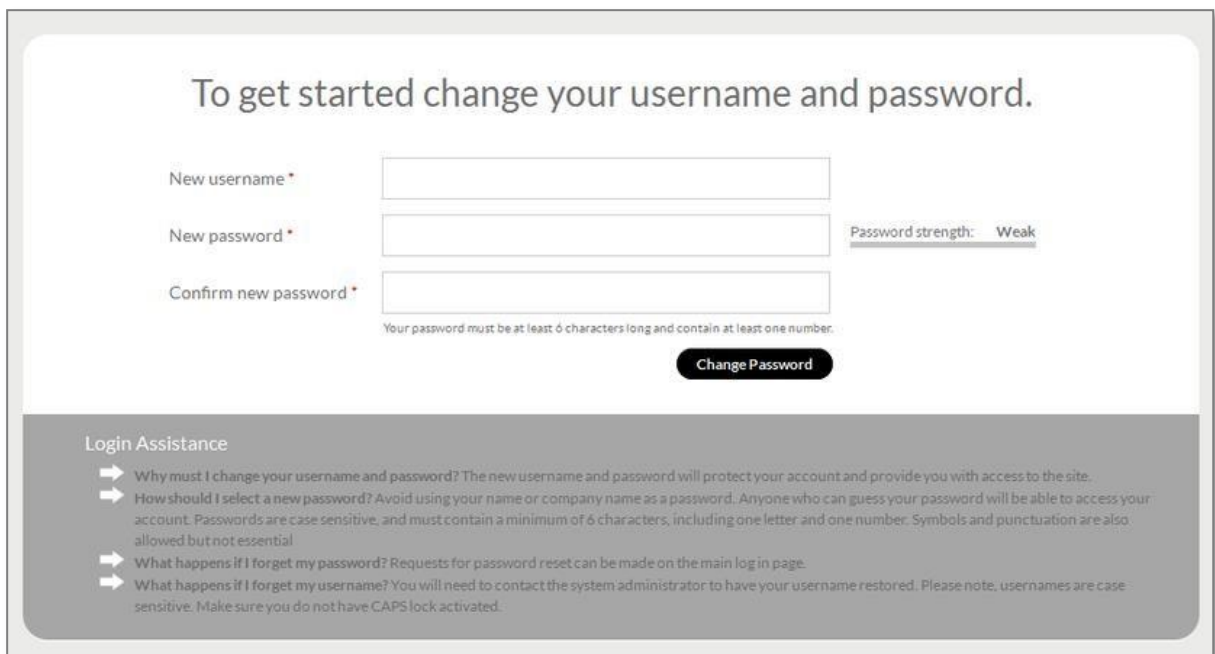
Step 3: - Log in using the Username and password that you have been emailed for this system

How to login for the first time

Follow the simple steps below to find out how to login for the first time.

An email will be sent containing a link to the site, with a randomly generated username and password. Click on the link and input these details, the system will ask that the username and password are changed to make them more memorable.

Once the user has entered their new username and password and clicked **Change Password**, the system will take them to their **Me** Page.

Step 4: - Locate your form.

This can be found on the "Me" page. The "Me" Page is the first screen you will see when you log in.

The "Me" page contains the My Reviews which shows you who your reviewer is and if you need to take any action.

It also contains your review form. Click on the "Feedback for Performance Link" and this will take you to your review form

Step 5: - Review form

The review form itself is split into 2 sections.

Section 1 - Review form process: the process you need to go through to share and close your form and then finalise the form

Once in your review form you will see 2 boxes at the top of the form which will start off in Grey and eventually they will change to Green. They are entitled "meeting date" and "share".

Meeting date Box

Reviewers – Only Reviewers can set the meeting date. You will see the link Set a meeting date in your box when you log into your form.

Reviewees – You will not see the Set a meeting date link in the meeting date box but you will receive an action to accept a meeting date once this has been set by the reviewer.

Once a meeting date has been set and agreed then this box will turn Green.

Share Box

Once you have completed the review form you will need to click on Share and Close to Share your form and content with your reviewer.

Once a Reviewee has shared a form the Reviewer will receive an action that they are now able to look at and comment on the form. Once they have done this the Reviewer can Share and Close the form back to the reviewee who will then receive an action that the reviewer has completed their part of the form.

When the form has been shared and closed at least once between the reviewer and reviewee the "Share" box will also turn green.

Once **"Meeting Date"** Box and "Share" box are both green the "Cannot finalise yet" box will change to Green and the wording will change to "finalise form"

You can share and close the form, making changes as many times as your like, before you finalise the forms. Once the forms have been finalised (usually after the face to face meeting between the reviewer and reviewee) you cannot make any changes to the form and the form is complete.

Section 2 – The form itself

The 2nd section of the review shows the form itself. This consists for 4 tabs which you need to complete in order to be able to share your form.
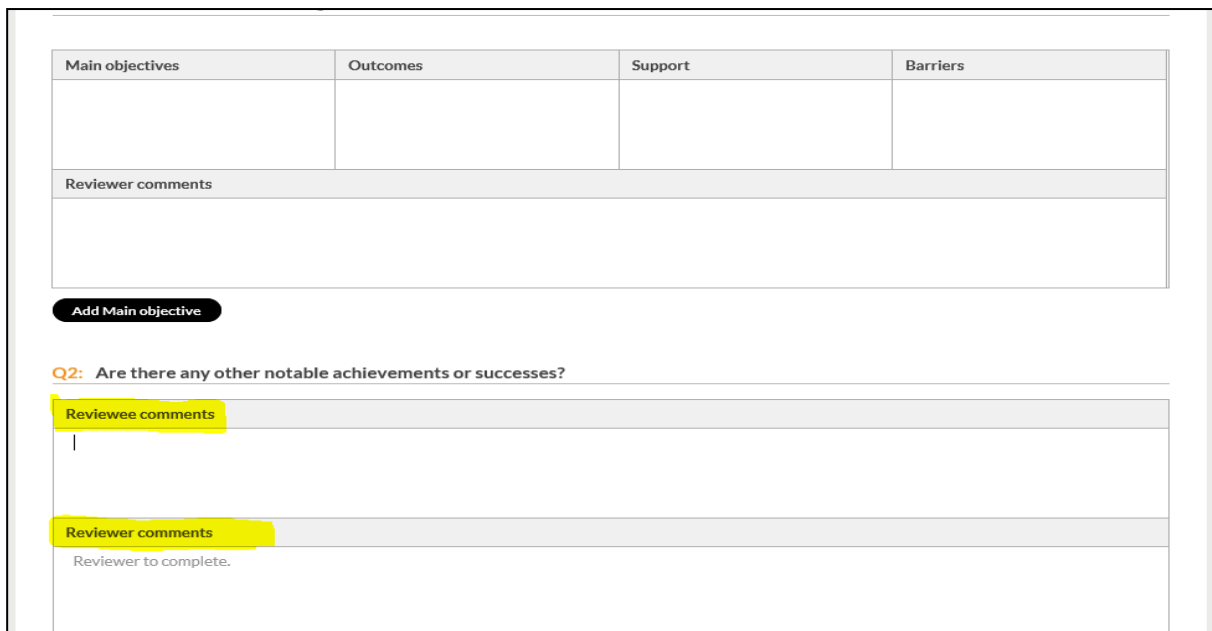
The 4 tabs are

- Introduction
- My work to date
- Planning Ahead
- Outcomes
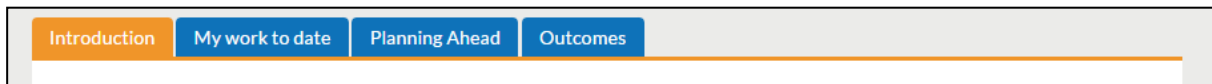
The forms are made up of free text boxes so you can free type into the boxes as much information as you like.

If you are the reviewee you will only be able to type in the "Reviewee Comments" section and if you are the Reviewer you will only be able to type in the "Reviewer Comments" section.

There are a number of question marks **(?)** on the forms. Clicking on these will open up helpful hints to guide you how to complete a section of the form.

Simply work your way through the tabs until you have completed all the sections in all 4 tabs and you are ready to share with the reviewer.

Step 6 - Saving the form

Auto Save - The form automatically saves the content of the form every 30 seconds

Save – Saves a draft version of the form as you go along. You can leave the form and go back into it at any stage and continue where you left off

Save and Close – Saves a draft version as you go along and takes you back to your "Me" page. You must make sure you Save and Close your form each time, and before you log out, so you are not "left" in your form when you don't want to be. This will ensure your reviewer can look at your form as only one person can be in a form at a time

The bottom of the form shows "Save" and "Save and Close"

Share and Close – This saves the form and shares the content with your reviewer

The top of the form shows the "Share and Close" button

Share

Once you have completed the form below, click here to share your content with your reviewer.

Share and close