

Chapter 19

SC Daily Performance Review

19-1. General.

a. A productive daily performance review (DPR) with your recruiters is the key to successfully leading your RS to mission success. The ARISS laptop with the Leads-Reports application is your electronic prospect data record box. When you conduct a DPR, you are actually updating all of the RS reports at the same time. Using it properly will help you have productive DPRs with your recruiters. Before you DPR with your recruiters you will need to replicate to ensure the Leads-Reports application is up-to-date. To replicate, connect to your ISP and have a secure tunnel before opening the Leads-Reports application. Review chapters 3 and 4 on logon and replication if you are not familiar with this process.

b. The following steps will show you how to record your DPR comments:

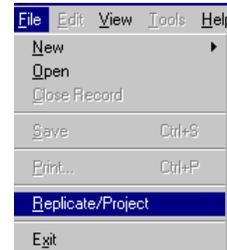
- (1) Update Leads-Reports application.
- (2) Identify records to DPR.
- (3) DPR of individual records.
- (4) DPR of school activities.
- (5) DPR of COI/VIP activities.

19-2. Update Leads-Reports application.



a. To open the Leads-Reports application double click on the **Leads-Reports** icon. The logon window will appear. Enter your **User Id** and **Password** and then click on **OK**. The **User Id** and **Password** is your NT login and should be the same data that you used to logon to the laptop.

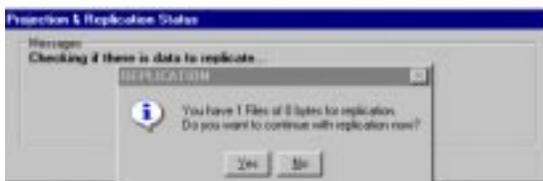
b. Once the Leads-Reports application opens, select **File** and then **Replicate/Project**. You can access the same screen by clicking on the **Telephone** icon. This will open the **Projection and Replication** screen.



c. Select **Replicate Only**.



Remember that you must be connected to your ISP and have a secure tunnel as reflected by the green T with a lock symbol to perform replication.



d. If there are records to receive you will get a window that asks if you want to download the record updates. Select **Yes**. Once replication is completed you will see a message window. If you have any messages they will be posted on this screen. You can print this screen by clicking on the **Print** button. Select **OK** and then select **Close** to exit the **Projection and Replication** screen.

e. Now that you have completed replication, you can minimize the **Leads-Reports** application and connect to the **TOS** to review certain reports. The reports that you may want to view at the **TOS** include the **Applicant Processing List, MEPS Processing List, MET Processing Log, Lead Source Analysis Report, DEP/DTP Tracking Log, and Leads Disposition**. These reports will assist you with conducting your DPR by showing your recruiters' past and future actions.

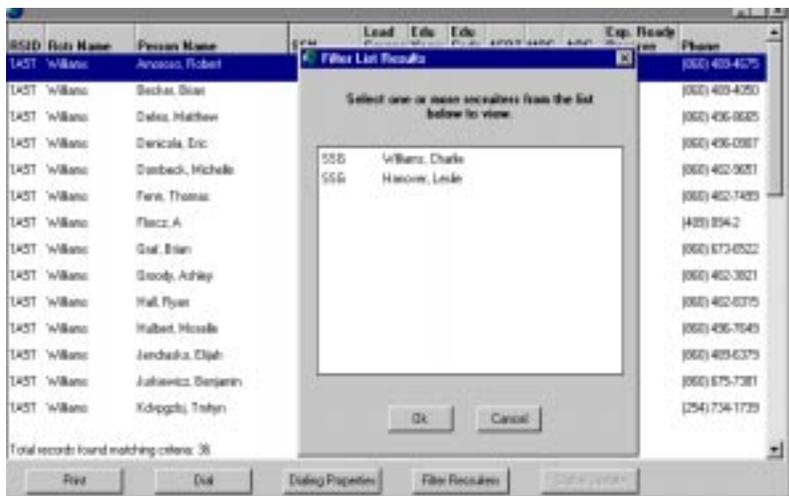
✓ Remember by completing a thorough DPR you are updating the reports once you replicate. These reports can be at the individual or RS level.

f. Now that you have replicated, updated your database, and pulled the reports from the TOS, all that you need to do is to review your recruiters' records and annotate your comments in the **Contact History** of the **ARISS-RWS Leads-Reports** application. Whether you minimized or closed the **ARISS-RWS Leads-Reports** application, you need to open the application to start your DPR. You need to go to the **Find** screen to identify the specific records you want to review. The **Find** screen will also allow you to review the recruiters' **COIs, VIPs, and School Activities** records.

✓ Review chapter 5 on the Find screen if you are not familiar with its functions.

19-3. Identify records to DPR.

a. You can identify the records that you need to DPR two different ways. First you can use the **Create List** function or you can use the **Find** screen.



b. If you are not familiar with the Create List function review chapter 10. There is a new feature that will allow you to filter individual recruiters once you have established your search criteria and pulled up the list. When you select the recruiter and click OK only those records assigned to that recruiter will show on the list. Once you're finished and want to do the next recruiter, just click on the **Filter Recruiters** button and select the next recruiter. This will help you keep the same criteria when doing your DPR.

✓ You will still need to follow this chapter to conduct your DPR, but you now have a choice in how you find the records in which to DPR.

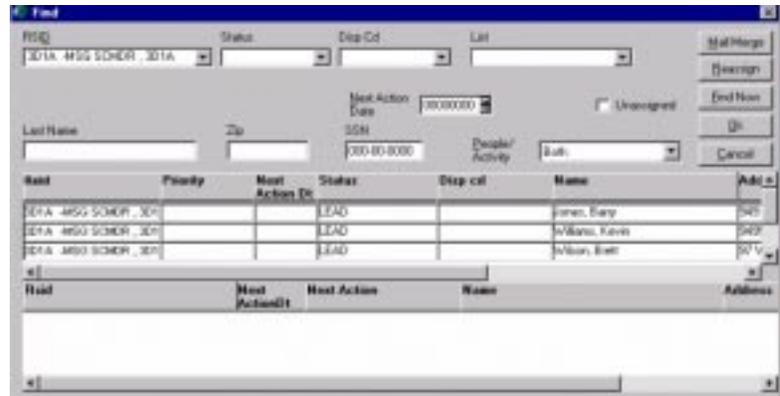
c. At the **Find** screen choose the recruiter from the **RSID** list and then select **Find Now**. This will show all of the records assigned to that recruiter. You can establish specific search criteria to narrow the records that you want to review. They can be used individually or in tandem with each other.

- (1) **Status** - Select Lead, Prospect, Applicant, DEP, or DTP.
- (2) **Disp Cd** - Choose from 38 dispositions codes.
- (3) **List** - Choose from saved lists.
- (4) **Next Action Date** - Choose date of next action.

(5) **Last Name** - Choose by last name.

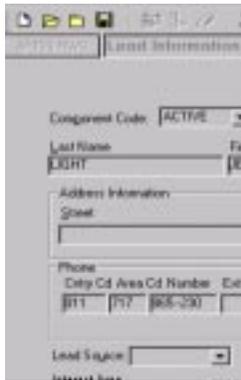
(6) **Zip** - Choose by ZIP Code.

(7) **SSN** - Choose a specific record by SSN.

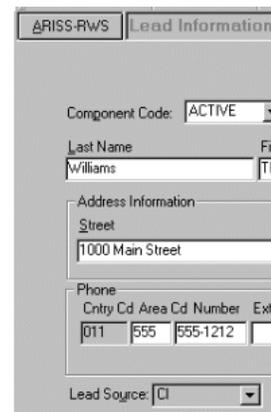


d. Once you have established your search criteria, click on **Find Now**. This will display all the records based on the search criteria. Clicking on any of the column header buttons will sort the records in ascending or descending order by that column. Select the applicant's record that you want to review and click on **OK**. This will take you to the **Prospect Record** or **Lead Information** screen depending on the applicant's status.

e. Once the record is open you must first determine if the information is valid and complete and then give detailed instructions and guidance to the recruiter. This will ensure the processing cycle is compressed. Remember to record your comments in **Contact History** when reviewing the applicant's data and discussing with your recruiter.

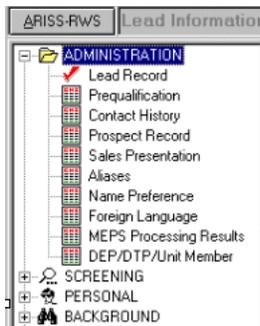


f. If you open a **Lead Information** record and the **ARISS-RWS** tab is grayed out, you will not be able to complete any further actions on this record. The recruiter needs to enter a **Lead Source** code before any comments can be recorded.



g. If the **ARISS-RWS** tab is not grayed out, you can review and record your comments on the record. Review this screen for completeness. Once reviewed click on the **ARISS-RWS** tab.

19-4. DPR of individual records.



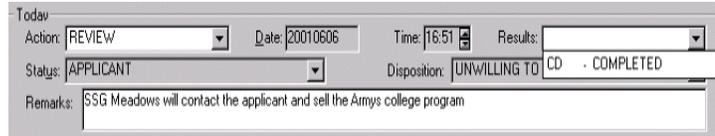
a. A menu will appear, select **Contact History** from the **ADMINISTRATION** menu.

USAREC Pam 601-32

b. Using the scroll bar in the **History** section will allow you to review all entries made by the recruiter, including those previously approved by you. Review those entries you have not acted on, discuss with recruiter, and either approve or disapprove them.

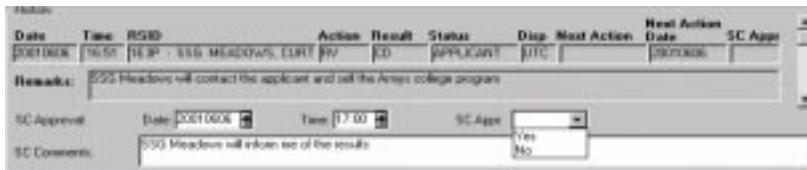


c. To reflect that you reviewed entries, select the **Action** drop-down arrow in the **Today** section. You will notice that you have only one selection so click on **REVIEW**. Select the **Results** drop-down arrow and click on your only selection which is **COMPLETED**. You can annotate any comments in the **Remark** section.



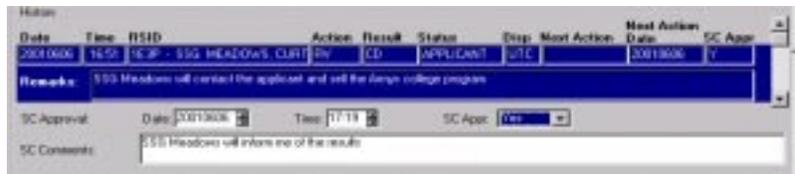
d. For the SC to approve the actions that are annotated in the **Today** section, the SC must click on the **Save** icon  to move **Today's** action to the **History** section.

✓ If you fail to save the Today's action before trying to complete the SC Appr, you will save only the last action in the History section.



e. Select the **SC Appr** menu near the bottom of the screen. You will select **Yes** or **No**. The **Yes** or **No** will now show under **SC Appr** in the **History** section. You can en-

ter comments as needed to give specific guidance to the recruiter.



✓ Approving specific disposition codes will remove the record from the recruiter's and your database. See chapter 23 on removing old and duplicate records for this process.

f. If there are actions that the recruiter has completed and you have not approved or disapproved them, you can enter that information now without annotating any information in the **Today** section. All that you need to do is scroll through the **History** entries and select **Yes** or **No** from the **SC Appr** drop-down arrow. Save and close the record when finished and move on to the next record that you need to DPR. Repeat the above steps until you have completed reviewing the individual records.

19-5. DPR of school activities.

a. During DPR with the recruiter you have the ability to review all scheduled and conducted school visits or activities. The steps are similar to reviewing an individual record. This allows you to see all the activities scheduled without using the School Folders. Select **File** and **Open** from the menu bar. The bottom portion of the screen contains the **Schools Activities** that are scheduled. Click on the record that you want to review and select **Find Now**.

Next Action Dt	Next Action	Name	Address
20000811	APPOINTMENT	Moore,Bob	1200 Northern Blvd Queens
20000813	APPOINTMENT	Steven,Snyder	184-17, Queens Blvd Queens
20000816	CAREER DAY	COI/MIP,Harland	123 K. St Del Rio

b. Review the information on the record. Select the **Action** drop-down arrow and choose **REVIEW** and then select **CONDUCTED** from the **Result Code** drop-down arrow. As you can see there is only one item that you can select from

the **Action** and **Result Code**. You can enter your comments in the **Remarks** section. Now click on the **Save** icon. You will notice that your actions are now showing in the **History** section.

History	Action Date	Time	School Name	RSID	Rank	Last Name	First Name	Action Result	Action Code
	20090821	08:47	LEBANON CATHOLIC HIGH SCHOOL	10P	SGT	MILLER	MATTHEW	CONDUCTED	REVIEW

Remarks: Need to set up a school presentation during their Job day

c. If you want to review the other schools, click on the **School** drop-down arrow and select the next school. Enter the **Action**, **Result Code**, and **Remarks** for each school that you review.

d. To return to the **Find** screen to continue your review, click on the **Open Folder** icon or click on **File** from the menu bar and then click on **Open**.

19-6. DPR of COI/VIP activities.

a. During DPR with your recruiter you have the ability to review all scheduled and conducted COI and VIP activities. The steps are similar to reviewing an individual record and school activities. This allows you to see all the activities scheduled and conducted. Just like the school activities scheduled, the bottom portion of the screen contains the COI and VIP records. Choose the record that you want to review and select **OK**. This will open the **COI** or **VIP** record.

Next Action ID	Next Action	Name	Address
00000811	APPOINTMENT	Moore, Bob	1200 Northern Blvd Queens
00000813	APPOINTMENT	Steven Snyder	794 77 Queens Blvd Queens
00000816	CAREER DAY	COI/VIP Harland	1225 St Del Rio

b. Review the information on the record. Select the **Action** drop-down arrow and choose **REVIEW**. Select the **Result Cd** drop-down arrow and choose **CONDUCTED**. Enter remarks in the **Remark** section.

c. When you save the information your actions will be moved to the **History** section. To exit and return to the **Find** screen, again click on the **Open Folder** icon. Repeat the above steps on all COI and VIP records that need to be reviewed.

d. When finished reviewing all records you need to replicate the information to your recruiter. To replicate, select the **Telephone** icon or select **File** and then click on **Replicate/Project**. The replication window will open, select **Replicate Only**.