MANAGER DOCUMENTS

Setting Criteria
Employee
- Adds all criteria
  - Email Notification → Sent to Manager each time goal is added and saved.
Manager
- Edit/Add Goals, Responsibilities, Competencies and Customer Service items
- Clicks APPROVE
  - Email Notification → Sent to Employee that criteria has been established.

Completing Evaluation and Submitting for Approval
Employee
- Completes Self Evaluation for WHOLE document
- Clicks COMPLETE
  - Email Notification → Sent to Manager that self-evaluation has been completed.
Manager
- Completes Employees Evaluation for WHOLE document
- Clicks SUBMIT FOR APPROVAL
  - Email Notification → Sent to Sr Manager that evaluation has been submitted.
Sr Manager
- Clicks DENY (document routes back to Mgr for edits for resubmitting for approvals)
  - Email Notification → Sent to Manager that evaluation has been denied.
- Clicks APPROVE (document routes back to Mgr to share with EE)
  - Email Notification → Sent to Manager that evaluation has been approved.

Holding Review and Closing out Evaluation
Manager
- Clicks SHARE WITH EMPLOYEE
  - Email Notification → Sent to Employee that evaluation has been shared.
Employee
- Clicks ACKNOWLEDGE
  - If EE doesn’t acknowledge, Manager will override acknowledgement
  - Email Notification → Sent to Manager that employee has been acknowledged evaluation.

Once Employee clicks ACKNOWLEDGE, the document is automatically finalized.

DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED