

MANAGER DOCUMENTS

Setting Criteria

Employee

- Add Goals, Responsibilities (Mgr Responsibilities/Responsibilities) and Competencies (Competencies/Customer Service)
- Click SAVE

Manager

- Edit/Add Goals, Responsibilities (Mgr Responsibilities/Responsibilities) and Competencies (Competencies/Customer Service)
- Click SAVE
- Click APPROVE

Completing Evaluation and Submitting for Approval

Employee

- Complete Self Evaluation for WHOLE document
- Click SAVE
- Click COMPLETE

Manager

- Complete Employees Evaluation for WHOLE document
- Click SAVE
- Click SUBMIT FOR APPROVAL

Sr. Manager

- Click DENY (document routes back to Mgr for edits before resubmitting for approval)
- Click APPROVE (document routes back to Mgr to share with employee)

Holding Review and Closing Out Evaluation

Manager

- Click SHARE WITH EMPLOYEE
(Employee will review ratings. Manager will then meet with Employee and hold review.)

Manager

- Click REQUEST ACKNOWLEDGMENT

Employee

- Input any comments and click ACKNOWLEDGE

Manager (if Employee **DOESN'T** acknowledge)

- Click OVERRIDE ACKNOWLEDGMENT
- Select either EMPLOYEE UNAVAILABLE or EMPLOYEE REFUSES

Manager

- Click COMPLETE
Manager must get back into the employees document and click complete, otherwise the document will still show as pending.

DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED