STAFF/TRADES DOCUMENTS

Setting Criteria

Employee

- Adds Goals
  - *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 acknowledged evaluation.*

Once Employee clicks ACKNOWLEDGE, the document is automatically finalized.

DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED