

# EXECUTIVE 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

### Employee

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

### Manager

- Complete Employees Evaluation for WHOLE document
- Click SAVE
- Click SHARE WITH EMPLOYEE  
(Employee will review ratings. Manager will then meet with Employee and hold review.)

### Employee

- Click ACKNOWLEDGE

## Finalizing and Closing Out Evaluation

- Once Employee clicks ACKNOWLEDGE, the document is automatically finalized

**DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED**