

# STAFF/TRADES DOCUMENTS

## Setting Criteria

### Employee

- Add Goals
- Click SAVE

### Manager

- Add Goals, 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**