

## EXECUTIVE DOCUMENTS

### Setting Criteria

#### Employee

- Adds all criteria

#### Manager

- Edit/Add Goals, Responsibilities, Competencies and Customer Service items
- Clicks [APPROVE](#)
  - *Email Notification → Sent to Employee that criteria has been established.*

### Completing Evaluation

#### Employee

- Completes Self Evaluation for WHOLE document

#### Manager

- Completes Employees Evaluation for WHOLE document

### Holding Review and Closing out Evaluation

#### Manager

- Clicks [SHARE WITH EMPLOYEE](#)
  - *Email Notification → Sent to Employee that evaluation has been shared.*

#### Employee

- Clicks [ACKNOWLEDGE](#)
  - *Email Notification → Sent to Manager that employee has been acknowledged evaluation.*
  - If EE doesn't acknowledge, Manager will override acknowledgement
- Once Employee clicks [ACKNOWLEDGE](#), the document is automatically finalized.

**DOCUMENT IS FINALIZED AND STATUS SHOWS COMPLETED**