

VIEW PENDING DOCUMENTS

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This item lets you see what documents you, as a manager, still have yet to get to the point where they are SEALED. In a nutshell, here's the deal.

Whenever you create any kind of document for one of your staff: annual evaluation, periodic evaluation, introductory evaluation, coaching document, training document, applause document, disciplinary document; you will be asked to note whether it is OPEN, COMPLETE or SEALED.

OPEN means the document hasn't been touched or there is still significant work to do. If a document is OPEN, then you will get email reminders about that document (for example, for an annual review you get email reminders 30 days before it is due, 7 days before, and 3 days after). COMPLETE means you are done with it, but it can still be edited, but it will turn off the email reminders that you have an evaluation due.







One example, perhaps you've completed your portion of the Annual Review, but haven't yet reviewed with the employee. You may choose to leave it OPEN. Then you go over the review with the employee, you discuss some scores that you decide to change, plus there are employee comments to add. Once that is done, you may choose COMPLETE. COMPLETE means that you are done, but that the document can still be edited. Perhaps you set a goal in the annual review that needs follow up in a couple of months. Wait until that piece is done, go in and make notes on it, then you may choose to select SEALED.

Once the document is SEALED, it cannot be edited. This offers security to your staff member that final documents are the final document.

By clicking on VIEW PENDING DOCUMENTS, you can note all the documents that are still outstanding, not yet SEALED. It is simply a list to remind you of what is coming. In fact, you can click on the document in the link and edit it from this page (we cover editing each type of document in the chapter on that type of document).

The document can also be deleted by selecting the trash can

Click on a pending document to open for viewing and editing.

Del?	Employee Name	Employee ID	Document Type	Date	Status
	Cathy Battreall	5468	Annual Review	09/29/2006	Complete
	Cathy Battreall	5468	Coaching Document	09/29/2006	Complete
	Cathy Battreall	5468	Training Document	09/29/2006	Open
	Elli Losiniecki	387821234	Coaching Document	10/09/2006	Complete
	Elli Losiniecki	387821234	Coaching Document	10/16/2006	Open
	Elli Losiniecki	387821234	Introductory Evaluation	10/09/2006	Open
	Elli Losiniecki	387821234	Training Document	10/11/2006	Open
	Pam Tom	9872	Annual Review	11/20/2006	Complete

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