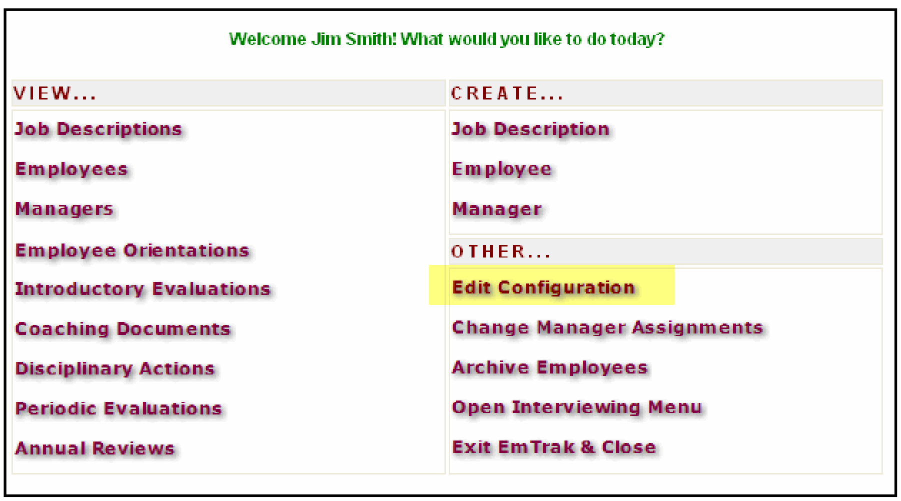
SUPER MANAGER – BUILDING A COMPANY INTO EMTRAK

The Super Manager is the individual (or individuals) able to view the whole company. This is the person that monitors the action, ensures job descriptions are done and accurate, follows up with managers when evaluations weren't completed. In other chapters, we have covered several of the tasks you and managers share – creating job descriptions and employees; working with individual employee documents such as annual evaluations and coaching documents. In this chapter we focus on tasks that belong to the Super Manager alone, and the best way to show most of those is to show you how to build a company into EmTrak, step-by-step.

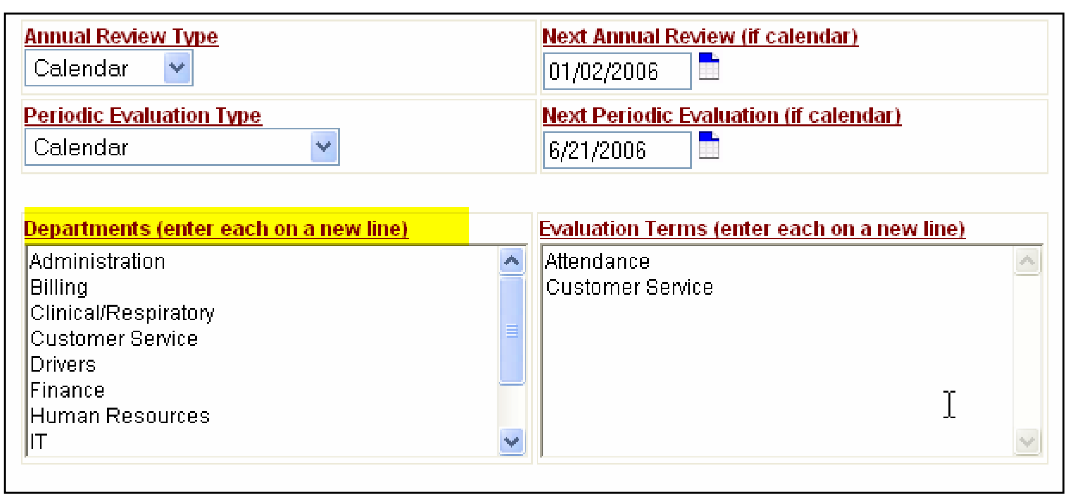
STEP 1. NAME YOUR DEPARTMENTS

You will find as we go through EmTrak 3.1 that it is designed to conform to the parameters of your company, not your company to the parameters of EmTrak. So, the first thing you are going to do is name the departments in your company.

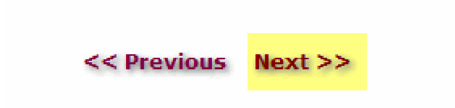
Click on EDIT CONFIGURATION



You will see this box for Departments. Simply enter all of the departments of your company in here (we will get to Evaluation Terms and everything else on this page later!)



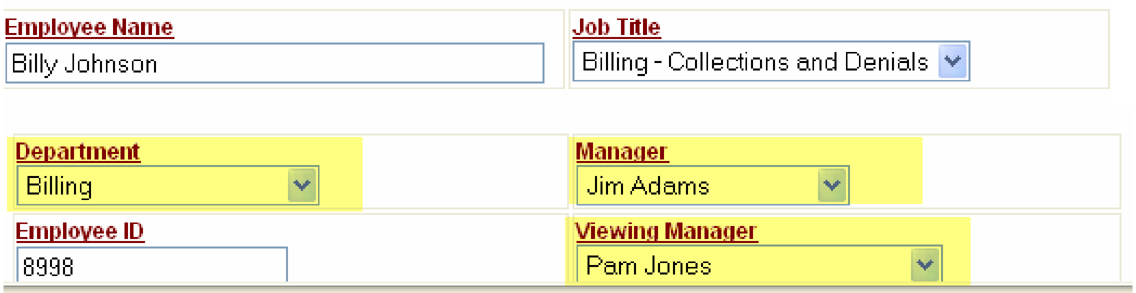
Click on the NEXT button at the bottom of the page and that will save the departments you named.



Naming Departments

There are challenges for some on actually naming their departments, especially for companies with branches. Should each branch be a department or should you have a Sales department even though there are salespeople at each branch? My recommendation is to create departments by category (such as Sales) rather than by branch. You can assign any Manager to evaluate and supervise an employee, even if the Manager's department does not match the employee's. <u>The critical issue is that when you create an employee and assign them a job description, the department the job description is assigned to MUST match the department the employee is assigned to.</u>

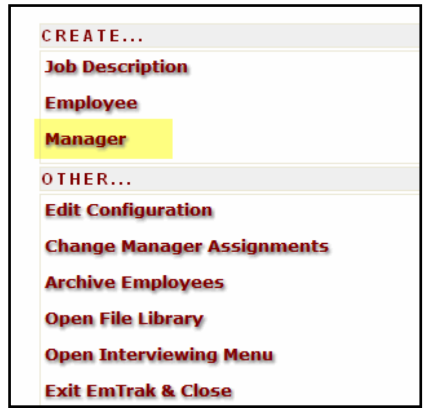
Another nice option you have is to designate a Viewing Manager when you create an employee – we designed that specifically for these type of branch situations: perhaps your Sales Manager evaluates all salespeople, but the branch manager where that salesperson offices wants the ability to do or share an evaluation.



STEP #2: CREATE MANAGERS

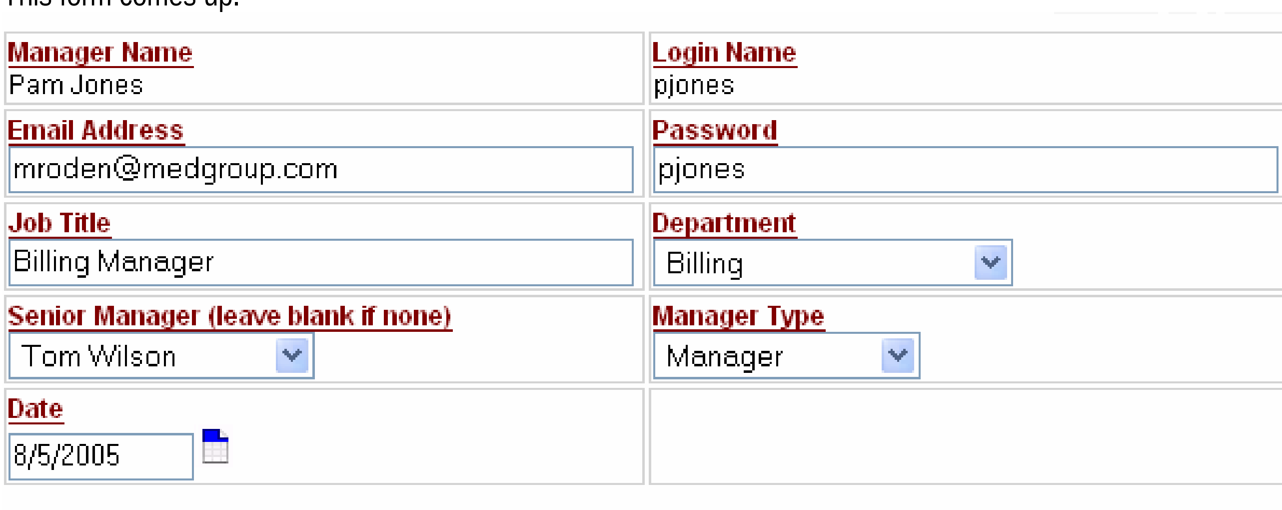
You've named your departments; the next step is to create the managers for the company. When you create managers, you are creating their access to EmTrak 3.1 and you are setting them up so that you can assign employees to them when you CREATE EMPLOYEES. Keep in mind that a manager is also an employee, meaning that if they are evaluated by someone else and if you want to create a job description for them, you need to create them as an employee later.

Go to your opening page as Super Manager. Click on CREATE > MANAGER.



I am going to suggest your build your managers from the top down, meaning create your senior managers first, those who supervise and manager other managers. The reason you do this will make more sense in a moment when we discuss assigning a Senior Manager to a Manager.

This form comes up.



Manager Name Pam Jones	Login Name pjones
Email Address mroden@medgroup.com	Password pjones
Job Title Billing Manager	Department Billing
Senior Manager (leave blank if none) Tom Wilson	Manager Type Manager
Date 8/5/2005	

Manager Name - Enter the name of the manager, simply first and last name
Login name – create the log-in name you want him/her to use for EmTrak. Usually you would use first initial and last name.
Email address – this email address will be the destination for email reminders.
Password – ask the manager what password he/she prefers and put it in the box.
Job Title - Put in the job title for this manager (this does not connect to a job description, you would do that when you create this manager as an employee.)
Department - At Department, you will note a pull down menu that allows you to choose from the departments you created.
Senior Manager - If there is a manager that supervises this manager, then click on that pull down menu and select that person as a Senior Manager. Here's where this is of such value. It allows you to tier the company. For example, in the sample below, the Manager is Pam Jones, her Senior Manager is Tom Wilson. Let's say Tom also supervises Willy Loman. When Tom logs into Tom will be able to see all the employees that work for Pam and for Willy. Even further, let's say Tom reports to a Division Manager or VP. When you create Tom's

manager access, you could choose that VP as Tom's Senior Manager. Then that VP can view every employee that works for Tom and the employee of every other manager within that division.
Manager Type - This has nothing to do with Senior Manager discussed above. This is simply designating whether a person you are entering is a Super Manager, with the ability to view everything and everyone in EmTrak. The default setting is Manager. You can have more than one Super Manager, but I don't recommend it.
Date – the date is input automatically – this is the date that manager was created into EmTrak.

Click the NEXT button and that manager is in!

STEP #3 CREATE JOB DESCRIPTIONS

Here is what I recommend you do before creating the job descriptions. Create for yourself a list of every employee and the name you are going to give their job description. Make certain you know who is going to share job descriptions. Make certain you know what departments those job descriptions go into. Rather than going into detail on creating job descriptions in this piece, let me encourage you to review the chapter on CREATING JOB DESCRIPTIONS.

Both Managers and Super Managers can create job descriptions. However, you might decide that only the Super Manager actually inputs the job descriptions, but with help from managers. It's easy to do that, here are my suggestions. Every job you can create on-line is available as a Word document on this CD. So, if for example, you were going to create a CSR, there is a template where you can pick and choose your tasks. If you are going to get your managers involved, print those templates out and get into their hands. Remember that in the new EmTrak 3.1, every single bullet point can be changed, so encourage your managers to get their red pen and make changes and suggestions. If job descriptions are going to be combined (such as Respiratory Therapist and Sales) get both templates in their hands, have them make changes, get rid of duplications – all of that before you can begin.

The key is to get everything in order and print that list before you begin. Then as each job description is created, highlight on the printed list that it is done.

If there are significant changes in a job template, a lot of changes with the bullet points, then I suggest you open that template as a Word document and make the changes in it first. That way, when you create them on-line, you will simply cut and paste – in the end simpler than trying to do it all on-line.

Again, please review in detail the chapter on CREATING JOB DESCRIPTIONS.

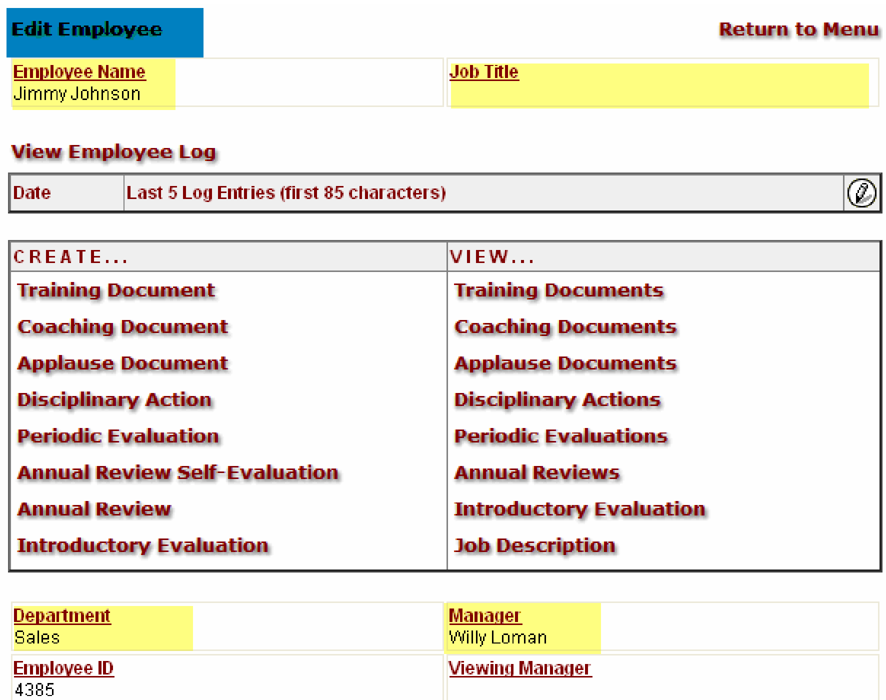
STEP #4 ADD EMPLOYEES

Now we are going to add all of your employees and assign them their job descriptions. You've got the original list in front of you. Simply highlight on the printed page each employee as he/she is input and assigned the job description. The steps are covered in detail in the chapter on CREATING EMPLOYEES. Keep in mind that managers are also employees, they report to someone and they will need a job description assigned to them. So, we are going to add EVERYONE as an employee. Remember that both Managers and Super Managers can create employees. Again, for consistency's sake, you may choose for that initially to come through the Super Manager.

Could I add Employees first and then later put in the job descriptions?

Yes, you can, and in fact, for many that may be easier. Rather then waiting on everyone to get their ideas for job descriptions in, you are able to name your departments and managers, and then put in all the employees in 3 simple steps In this case, you can save an employee without assigning him/her a job description.

Notice on this sample we created employee Jimmy Johnson, we assigned him to Sales and assigned his manager as Willy Loman. However, he hasn't been assigned a Job Title/Job Description yet.



Jimmy is an Administrative Assistant in Sales. Now let's say that you created that job description. Get to Jimmy's page and click on EDIT EMPLOYEE (as you see in blue above).

This page comes up. Click on the pull down menu of Job Descriptions – choose Sales- Administrative Assistant, click NEXT and Jimmy is complete. Keep in mind that the department the job description has been assigned to must match the department that Jimmy is in.