

SUPER MANAGER – THE EDIT CONFIGURATION PAGE

The EDIT CONFIGURATION button offers you the opportunity to manage several elements for your company. Let's go through them one-by-one.

Click on EDIT CONFIGURATION

- CREATE...
- Job Description
- Employee
- Manager
- OTHER...
- Edit Configuration**
- Change Manager Assignments
- Archive Employees
- Open File Library
- Open Interviewing Menu
- Exit EmTrak & Close

Company Information

The first thing you will see at the top of the Edit Configuration page is your Company Information (for your main location). We actually create this information when we create your account for EmTrak. If any of the information is wrong, please contact us so we can correct it.

Name MED Supply Company	Account Number 1000
Address 1234 56th Street	Phone (806) 793-8421
City Lubbock	Fax (806) 793-6480
State TX	Web Site http://www.medgroup.com
Zip 79424	

Email Reminders

As Super Manager you have the responsibility to determine what email reminders you want sent to managers and yourself.

Receive Introductory Evaluation Reminders? Yes ▾	Receive Introductory Evaluation Follow-ups? Yes ▾
Receive Periodic Evaluation Reminders? Yes ▾	Receive Periodic Evaluation Follow-ups? Yes ▾
Receive Annual Review Reminders? Yes ▾	Receive Annual Review Follow-ups? Yes ▾
Receive Coaching Document Follow-ups? Yes ▾	Receive Disciplinary Action Follow-ups? Yes ▾
Receive Training Document Follow-Ups? Yes ▾	Email Overdue Evaluation Notices To mroden@medgroup.com

Receive Introductory Evaluation Reminders - these reminders go to a manager 7 days before the end of the 90 day Introductory Evaluation period. They come automatically, based upon the hire date of the employee. If the evaluation is not done, then two days after both that manager and you, the super manager, will get notice that the evaluation has not been completed.

Receive Introductory Evaluation Follow-ups – This follow-up is based on the follow-up date set in the Introductory Evaluation. Most often recommended is setting goals for the second three months of employment and following up then (120 days into employment). The manager will get a reminder 7 days before that follow-up is due.

Receive Training Document Follow-ups - This follow-up is based on the follow-up date set in the Training Document. The manager will get a reminder 7 days before that follow-up is due, allowing him/her to ensure that the training assigned is done.

Receive Periodic Evaluation Reminders - these reminders go to a manager 7 days before a Periodic Evaluation is due (if you choose for your company to do them). They come automatically, based upon the hire date of the employee or upon a calendar date set by you. If the evaluation is not done, then two days after both that manager and you, the super manager, will get notice that the evaluation has not been completed.

Receive Periodic Evaluation Follow-ups - This follow-up is based on the follow-up date set in the Periodic Evaluation. If goals were set and need follow-up, then the manager will get a reminder 7 days before that follow-up is due, allowing him/her to ensure that the goals have been completed.

Receive Annual Review Reminders – this sets into place two reminders. The first comes 30 days before the evaluation is due, reminding the manager to print out the Annual Review Self-Evaluation and get it in the hands of the employee who will be evaluated. Then 7 days before the review is to be completed, the manager will get a reminder to retrieve the self-evaluation and

complete the annual review. If the evaluation is not done, then two days after both that manager and you, the super manager, will get notice that the evaluation has not been completed.

Receive Annual Review Follow-ups - This follow-up is based on the follow-up date set in the Annual Review. If goals were set and need follow-up, then the manager will get a reminder 7 days before that follow-up is due, allowing him/her to ensure that the goals have been completed.

Receive Coaching Document Follow-ups - This follow-up is based on the follow-up date set in the Coaching Document. The manager will get a reminder 7 days before that follow-up is due, allowing him/her to ensure that the coaching tasks have been completed.

Receive Disciplinary Action Follow-ups - This follow-up is based on the follow-up date set in the Disciplinary Action. The manager will get a reminder 7 days before that follow-up is due, allowing him/her to ensure that the coaching tasks/disciplinary actions have been completed or to ensure he/she takes appropriate further action.

Email Overdue Evaluation Notices to – If you are the Super Manager, managing EmTrak on behalf of the company, then this is you! This means when evaluations (introductory, periodic, annual) are not completed by the due date, you and that manager will get a reminder to get them completed.

Review Types

The next thing you see on the Edit Configuration types is on Review Types. If your Annual reviews are based on a Calendar year, (if, for example, everyone does their reviews in December), then you would select Calendar under Annual Review Type and under Next Annual Review, put the date. If you select Anniversary, then the annual reviews will be based on the employee's hire/anniversary date.

<p>Annual Review Type</p> <p>Calendar</p> <p>Anniversary</p> <p>Calendar</p> <p>Calendar</p>	<p>Next Annual Review (if calendar)</p> <p>12/31/2006</p>
<p>Periodic Evaluation Type</p> <p>Calendar</p>	<p>Next Periodic Evaluation (if calendar)</p> <p>9/30/2006</p>

For Periodic Evaluations, under Periodic Evaluation type, you can either choose:

- No Periodic Evaluations
- Calendar date (a single date when everyone is to do a Periodic Eval – in that case, put a date in the Next Periodic Evaluation field)
- Anniversary 3-6-9 months if you want a person evaluated every 3 months based on their hire/anniversary date
- Anniversary 6 months if you want a person evaluated on a semi-annual basis.

Departments, Evaluation Terms, Applause Items

Each of these was covered in detail in other chapters, but let's do a quick review.

Departments (enter each on a new line) Administration Billing Clinical/Respiratory Customer Service Drivers Finance Human Resources IT	Evaluation Terms (enter each on a new line) Attendance Customer Service
Applause Items (enter each on a new line) Outstanding action for our customers Professionalism Poise under pressure Making a positive impact on our workplace Achievement beyond goals Contributing an excellent idea that benefits our company Leadership	

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. You have the ability to define and name your departments in this field, to meet your company's needs. This is a critical part of building a company in EmTrak, covered in that chapter.

Once they are in, 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. 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.

Evaluation Terms

You enter these only if your company does Periodic Evaluations. We've created the option for this purpose. Let's say you want everyone to do a semi-annual periodic evaluation this month. There are two key issues that your company is trying to address: customer service and attendance. If you put those items in this box, then the information below will appear as an option on EVERY employee's periodic eval. These can be changed each time so that you can choose other elements to focus on. For more details on Periodic Evaluations, review the chapter **PERIODIC EVALUATIONS** on this CD.

Instructions – Please rate this employee's performance from 1 to 5 for each of the following categories.	
<ul style="list-style-type: none"><input type="radio"/> 5 = Exceptional, consistently exceeds expectations<input type="radio"/> 4 = Above Average, often exceeds expectations<input type="radio"/> 3 = Average, consistently meets expectations<input type="radio"/> 2 = Inadequate, consistently fails to meets expectations<input type="radio"/> 1 = Poor, immediate improvement required	
Attendance	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Customer Service	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5

Applause Items

This field comes pre-populated with terms, but you can add any you want or delete any. A reminder that these become the options available when a manager creates an Applause Document. For more on those documents, review the chapter on this CD on **APPLAUSE DOCUMENTS**.