

SUPER MANAGERS – VIEW MANAGERS

As a Super Manager, there are a couple of features within the View Managers item that will help you in managing evaluations and the managers who do them! Go to the opening menu and click on **VIEW > MANAGERS**.

The page below will come up. One simple feature is this – if you need to change a Manager's page, you would do it by entering this page and clicking on that Manager's name.

VIEW...

- [Job Descriptions](#)
- [Employees](#)
- [Managers](#)
- [Introductory Evaluations](#)
- [Training Documents](#)
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- [Annual Reviews](#)

Click on a manager to open for viewing and editing.

[Manager's Pending Documents Report](#)
[Manager's Employee Performance Report](#)

Del?	Manager Name	Senior Manager	Department	Manager Type	Status
	Ann Wilson	Pam Jones	Human Resources	Manager	Active
	Clark Gable	Jim Smith	IT	Manager	Active
	Jane Prince Jones	Pam Jones	Sales	Manager	Active
	Jim Adams	Jim Smith	Finance	Manager	Active
	Jim Smith		Administration	Super Manager	Active
	Myrna Loy	Pam Jones	Billing	Manager	Active
	Pam Jones	Tom Wilson	Billing	Manager	Active
	Paul Thomas	Jim Smith	IT	Manager	Active

Once that Manager's page is open, click on **EDIT MANAGER**.

Edit Manager
[Return to Menu](#)

Manager Name Jane Prince Jones	Login Name JPJones
Email Address mroden@medgroup.com	Password jpjones
Job Title Sales Manager	Department Sales
Senior Manager (leave blank if none) Pam Jones	Manager Type Manager
Date 11/11/2005	

Now you can make changes. Let's say that our manager above, Jane Prince Jones, wants to change her Password. Simply enter the new password, hit the next button, and her password for access to EmTrak has changed.

Manager Name Jane Prince Jones	Login Name JPJones
Email Address mroden@medgroup.com	Password jonesey
Job Title Sales Manager	Department Sales
Senior Manager (leave blank if none) Pam Jones	Manager Type Manager
Date 11/11/2005	
Manager Status <i>What is the status of this manager?</i> Active	

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More importantly, here are a couple of nice features on this View Managers page.

At the top of the page you see two elements:

- Manager's Pending Documents Report
- Manager's Employee Performance Report

Click on a manager to open for viewing and editing.

Manager's Pending Documents Report

Manager's Employee Performance Report

Del?	Manager Name	Senior Manager	Department	Manager Type	Status
	Ann Wilson	Pam Jones	Human Resources	Manager	Active
	Clark Gable	Jim Smith	IT	Manager	Active
	Jane Prince Jones	Pam Jones	Sales	Manager	Active
	Jim Adams	Jim Smith	Finance	Manager	Active

Manager's Pending Documents Report

Click on this link and this item lets you see what documents your managers have not yet SEALED. In a nutshell, here's the deal.

Whenever you or your managers 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 or they will be asked to note whether it is OPEN, COMPLETE or SEALED.

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

Del?	Employee Name	Employee ID	Manager Name	Document Type	Date	Status
	Billy Johnson	8998	Jim Adams	Annual Review	11/29/2006	Open
	Cathy Battreall	5468	Ann Wilson	Annual Review	09/29/2006	Complete
	Cathy Battreall	5468	Ann Wilson	Coaching Document	09/29/2006	Complete
	Cathy Battreall	5468	Ann Wilson	Training Document	09/29/2006	Open
	Doug Doug	6489	Steve Olsen	Coaching Document	11/17/2006	Open
	Doug Doug	6489	Steve Olsen	Training Document	11/17/2006	Open
	Elli Losiniecki	387821234	Pam Jones	Coaching Document	10/09/2006	Complete
	Elli Losiniecki	387821234	Pam Jones	Coaching Document	10/16/2006	Open
	Elli Losiniecki	387821234	Pam Jones	Introductory Evaluation	10/09/2006	Open
	Elli Losiniecki	387821234	Pam Jones	Training Document	10/11/2006	Open
	Gary Weems	1212	Jim Smith	Introductory Evaluation	10/02/2006	Open
	Gary Weems	1212	Jim Smith	Training Document	10/02/2006	Open
	Glenn Close	6666	Clark Gable	Introductory Evaluation	12/06/2006	Complete
	Glenn Close	6666	Clark Gable	Training Document	09/28/2006	Open
	James Doe	9040	Ted Long	Annual Review	11/14/2006	Open

OPEN means the document hasn't been touched or there is still significant work to do. If a document is OPEN, then they will get email reminders about that document (for example, for an annual review they get email reminders 30 days before it is due, 7 days before, and 3 days after). COMPLETE means the manager is done with it, but it can still be edited. For example, perhaps they've completed their portion of the Annual Review, but haven't yet reviewed with the employee. They may choose to leave it OPEN. Then they go over the review with the employee, discuss some scores that they decide to change, plus there are employee comments to add. Once that is done, they may choose COMPLETE. COMPLETE means that they are done, but perhaps they 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 they 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 documents.

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 view the document from this page.

The document can also be deleted by selecting the trash can to the side of the name and clicking on it.

Manager’s Employee Performance Report

Here’s a cool feature. As the HR Manager, you may have the responsibility of making certain managers do a good and fair job of evaluating their staff on annual reviews. EmTrak has a simple process of reviewing that. Click on **OPEN MANAGER’S EMPLOYEE PERFORMANCE REPORT**.

What you are looking at is the overall average your managers have given their employees on their **annual reviews**. So, if one manager shows an average of 4.8, another 2.0, you know that one is likely over-scoring, the other under-scoring. Both may need some additional coaching from you on the evaluation process – simply another nice piece of accountability in EmTrak.

You are viewing the average annual review scores by manager.

Manager Name	Job Title	Department	Average
Ann Wilson	HR Manager	Human Resources	3.70
Clark Gable	Director of Information Technology	IT	0.00
Jane Prince Jones	Sales Manager	Sales	0.00
Jim Adams	Purchasing Manager	Finance	0.00
Jim Smith	Head Honcho	Administration	1.00
Pam Jones	Billing Manager	Billing	3.57
Paul Thomas	IS Director	IT	3.83
Phil Stone	Director of Pharmacy	Pharmacy	0.00
Steve Olsen	Warehouse Manager	Service	0.00
Ted Long	Produce Manager	Customer Service	0.00
Willy P. Loman	Sales Manager	Sales	0.00

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