

# Define Criteria – Manager

The Define Criteria phase is generally the first step of the evaluation process. This step establishes the performance criteria that the employee will be evaluated against.

If this step is not completed by both the manager and employee, an email reminder will be sent seven days before the due date.

**Follow institution and manager recommendations for using this tool as part of the performance management process.**

## Review and Add Performance Criteria

1. Review the performance criteria located on each tab.
2. Update applicable criteria on each tab.
3. Click **Save**.  
**NOTE:** Saving allows the employee to see the performance criteria you have added.

## Release Document Back to Employee

Prior to approving the document, it can be released back to the employee to allow them to continue updating the performance criteria. During this time managers can continue editing the document.

1. Click the **Release to Employee** button in the upper right corner.
2. Click **OK**.  
**NOTE:** An email is NOT sent to the employee notifying them of the release.

## Approve Define Criteria

Once the performance criteria has been updated and reviewed with the employee, the document must be approved. Once this step is complete, the Define Criteria step is locked and can no longer be edited.

1. Click the **Approve** button in the upper right corner.
2. Click **Confirm**.  
**NOTE:** In special circumstances, the Define Criteria step can be re-opened, but it must be done by the manager or HR administrators.

Annual Evaluation		Save	Release to Employee		Approve
Define Criteria - Update and Approve		Print   Notify   Export			
ELSA EMPLOYEE					
Actions ▾					
Job Title GROUNDKEEPER		Manager MANNY MANAGER			