

Instructions for Sending OK's to the Reviewers

At any time you log into SASSIE you will want to check your accounts on SASSIE to see what is “COMPLETED” and in “HOLD A” daily. You don't need to email your OK's to the reviewer.

- First click on “Logs”.
- Select the client that you want to check.
- On the right you can select from the drop down and select a status of “Completed” AND “Hold A”
- You want to open the “Completed” shop by clicking on “Review” scan anything that you would usually review and then if you feel the shop is ready for the reviewer, scroll down to the bottom under “REVIEWER CONROLS”. Next to “*SHOP STATUS” you want to change the status of the shop to “HOLD B”. Click on “Update Survey” at the very bottom. The reviewers will only be looking for shops in “Hold B” status. They no longer look for shops in “Completed” or “Hold A” status.
- **ACCOUNT/REPS: Do not place any shops in “HOLD A”, this status is for the reviewers.**

REVIEWER CONTROLS

* SHOP STATUS Locked Reviewed By db Finalized By db

- If a shopper emails you asking you to make a correction to their report, (i.e. date, time, etc.) you now have access to make changes. If you see that there needs to be a correction to the employee's name, because you have the list you can also make this correction. If the correction is a simple change to the report, go ahead and make yourself, do not send it to the reviewers, after you have made the correction, you will need to “Update Survey”. It will take more of your time to type the changes in the green box to the reviewer, than it would be to just make the change on the form yourself. **DO NOT** put any shops back in the “COMPLETED” status this will erase the reviewers corrections.
- If a reviewer puts your shop on “Hold A”, you will need to open the shop and see what the reviewer has written to you in the green box. Go ahead and take care of the problem that the reviewer has mentioned. After the correction is made, please type in the green box, what you did in detailed description, so the reviewer knows what you did. (i.e. date, day, time, name, etc.) Please correct this basic information yourself on the form, rather than writing the corrections in the box for the reviewer. If you do ask the reviewer to make the correction for you, you will need to type this information in the green box. Then place the shop on “HOLD B”, and then “Update Survey”. This will let the reviewer know that the shop is ready to be reviewed.

INTERNAL USE ONLY

*REVIEWER: Here is an example of what you will need to type to the scheduler: **Your initials, Date, What is wrong with shop in detail and then Place on Hold A.**

*SCHEDULER: Here is an example of what needs to be written to the reviewer: **Your initials, Date, Correction made or needed, then Change status of shop to "Incomplete" or "Hold B", then Tell reviewer when/if ready to go to client.** (Incomplete: Shopper makes correction. Hold B: You made the correction or told the reviewer what correction needs to be made.) Also tell the reviewer here if the shop is to be excluded and if we need to pay the shopper or not.

Reviewer/Scheduler:

Spell Check

This is a running occurrence of this shop. Please do NOT delete any of this information.

Additional corrections that need to be made by the shopper, you can place the shop on “Incomplete”, click on “Update Survey” and then notify your shopper that they need to make the correction.