HR-120-005: Manage Employee Performance

As Employee, I want to:

1. Receive notification to participate in coaching
2. Take notes on myself
3. Receive notification of issued corrective action
4. View all issued corrective actions
5. See public notes
6. Add comments when signing an acknowledgement to a corrective action
7. To add attachments to notes

As Manager +1, I want to:

1. To create/view notes and corrective action for indirect reports

As Manager, I want to:

1. Add a meeting invite to a coaching meeting
2. Generate/edit/print/attach/delete a note
3. Mark the coaching as presented
4. Create/Submit the corrective action to HR
5. Issue corrective action
6. Ask for signature to acknowledge receipt of corrective action
7. View all notes and all corrective actions on the resource’s record
8. Add documentation
9. View all coaching sessions
10. Be able to print

As DHR/Agency, I want to:

1. Create notes for an employee
2. Approve/Return/Cancel a corrective action
3. Attach documentation to a corrective action
4. View all corrective actions
5. Edit/delete a correction action/note
6. Add a meeting invite to a coaching meeting
7. Generate/edit/print/attach/delete a note
8. Mark the coaching as presented
9. Create/Submit the corrective action to HR
10. Issue corrective action
11. Ask for signature to acknowledge receipt of corrective action
12. View all notes and all corrective actions on the resource’s record
13. Add documentation
14. View all coaching sessions
15. Be able to print

HR-120-010: Complaint
As **Employee**, I want to:

1. Initiate and submit a complaint/case
2. View the status of my complaint
3. Upload documentation
4. Cancel case
5. View complaint/case history
6. Notified of resolution/disposition

As **Complaint Line Lead**, I want to:

1. To initiate/submit/receive a complaint case
2. View status of all complaints
3. Assign a case
4. Close a case
5. Notified if employee cancels a case
6. Set number of days to respond with warning/alerts
7. Send notification of resolution to internal/external complaints
8. Review attachments submitted by field reps

As **DHR/Agency**, I want to:

1. To be notified of complaints for my agency rep if appropriate
2. To initiate/submit/receive a complaint case
3. Submit complaint back to complaint line lead
4. Be able to run reports
5. Receive notification of active complaints in assigned agencies

As **Manager**, I want to:

1. To initiate/submit a complaint case

**HR-120-020: Investigations**

As **Employee**, I want to:

1. Receive notification that my complaint is being investigated if applicable
2. Receive notification of resolution/disposition
3. Add documentation

As **DHR/Agency**, I want to:

1. Receive notification an investigation is required
2. Assign investigator in the system
3. Review investigation report
4. Create investigation report
5. Add documentation and comments
6. Send notification to key stakeholders and close case
7. Send notifications to internal/external stakeholders
8. Assign investigator to external investigator
9. To see history of investigations
10. Document a complaint that comes from EEOC
11. Close the case
12. Change/Update the complaint to an investigation
13. See how the investigation is progressing
14. View documents for an investigation
15. Limit access to confidential information
16. Reopen case
17. Place the employee on admin leave
18. Run reports on investigations

As Investigator, I want to:

1. Receive assigned investigation
2. Create investigative report
3. Add documentation
4. Limit access to confidential information
5. View resource records of all involved parties

As Agency Leadership, I want to:

1. See how the investigation is progressing
2. View documents for an investigation

HR-120-030: Problem Solving

As Employee, I want to:

1. Review KB to understand how to submit problem solving request
2. Submit problem solving request case
3. Request mediation
4. Attach documentation
5. Receive grievance resolution
6. Request next step in problem solving
7. Cancel request
8. Request to extend due date

As DHR/Agency, I want to:

1. To send/create attachments for grievance steps and agency leadership
2. To make edits or movements to employee record if necessary
3. Open problem solving case
4. Close case and open a grievance
5. Ask employee for additional information
6. Attach documentation/final resolution
7. Notify employee if continue with problem solving or not
8. Resolve a grievance
9. Make edits
10. Identify employee’s chain of command
11. Run reports on open grievances

**As Agency Leadership, I want to:**

1. Receive request to schedule meeting with employee
2. Receive mediation request
3. Review documentation
4. Send final decision/resolution
5. Request to extend due date
6. Be notified of upcoming/past due dates

**HR-120-040: Due Process**

**As Employee, I want to:**

1. Receive NOCA
2. Receive LODA
3. Acknowledge receipt of NOCA/LODA
4. Receive NOCA if access suspended
5. Extend due dates
6. Access

**As Manager, I want to:**

1. To not be able to withdraw a corrective action after it’s approved by DHR
2. Withdraw corrective action that lead to NOCA
3. 

**As DHR/Agency, I want to:**

1. To be able to print to deliver NOCA/LODA
2. Enter details in system
3. Review details with key stakeholders
4. Draft NOCA
5. Prepare letter of LODA
6. Draft document template and print
7. Pull into information from other parts of the system (coaching, corrective action)
8. Add or attach documentation
9. Withdraw NOCA
10. Cancel NOCA
11. Print NOCA to mail
12. Add comments
13. Delete the record in the case of the settlement

**As Agency Leadership, I want to:**

1. Extend due dates

**HR-120-050: Mediation**

**As Employee, I want to:**
1. Receive notification of mediation scheduled

As DHR/Agency, I want to:

1. Receive and review request
2. Assign internal/external mediator
3. Schedule/re-schedule mediation
4. Attach mediation agreement to grievance
5. Add comments to grievance
6. Initiate the grievance
7. Withdraw the mediation
8. Resolve the grievance
9. Select resolution type
10. Run reports

As Agency Leadership, I want to:

1. To be notified of mediation
2. Receive scheduled mediation
3. Receive notification when mediation is completed

HR-120-070: Create and Execute Performance Improvement Plan

As Employee, I want to:

1. Receive PIP
2. Review PIP
3. Acknowledge PIP (checkbox/electronic signature/initials)
4. Add comments
5. Receive notification of PIP meeting
6. Print out the PIP

As DHR/Agency, I want to:

1. Add documentation to PIP
2. Attach PIP in corrective action
3. Receive notification of PIP meeting
4. Print PIP template
5. Receive, approve, return, or cancel the PIP corrective action

As Manager, I want to:

1. Schedule PIP meeting
2. Update PIP with progress
3. Send comments to DHR on PIP
4. Update PIP to complete
5. Create and submit PIP corrective action
6. Review the PIP for the performance evaluation