Self-assessments

Checks a tribe completes on itself, and how an advisor approves them or sends them back for more work.

A **self-assessment** is a check the tribe completes about itself. It is the cheapest form of monitoring you have: a franchisee who works through the standards each quarter finds most of the problems before an advisor ever arrives.

They are built exactly like a visit — the same template builder, the same items and points — with the **Kind** set to Self-assessment.

> **HOW THE ANSWERS REACH YOU**
> The franchisee answers it from their own tribe. Once you schedule a self-assessment, or start one against the tribe, it appears in that tribe's To do and under Self-assessments on the tribe's Compliance page. The franchisee works through it, saves as they go and submits, and it lands with you for review. An advisor sitting with the franchisee can still answer it from head office; the two-step submit-then-review flow below is the same either way.

What makes them different

	Visit	Self-assessment
Answers come from	The business advisor's own observation	The tribe, recorded on their behalf
On submit	Complete	Goes to Awaiting review
Then	Nothing further needed	An advisor approves it or returns it

Reviewing one

1. Open **Self-Assessments**. Anything waiting on you shows as Awaiting review.
2. Read the report — the score, the summary and every answer with its photographs.
3. Press **Review**.
4. Choose **Approve** to accept it, or **Return** with a note saying what is needed.

A returned assessment goes back to **Returned**, with your notes on the record, and can be worked on and submitted again. Pass the notes on to the franchisee, since they cannot read them in the app yet. Approving completes it and it behaves like any other finished check from then on.

> **RETURNING NEEDS A NOTE**
> You cannot return an assessment without writing what is wrong. A submission that comes back with no explanation gets resubmitted unchanged, and the tribe learns that the review step is noise.

Corrective actions still apply

Items the tribe failed raise corrective actions the same way they would on a visit. A tribe that honestly marks its own fire extinguisher check as failed has already created the task to fix it.

> **DECIDE WHETHER THE SCORE IS SHARED**
> The template setting Show the score to the franchisee decides what the tribe sees on the completed report: every item and whether it passed either way, but the number and the points only when the switch is on. Some brands find that hiding the number from a self-assessment produces more honest answers, because the tribe is not marking its own exam.