

Obtaining Signatures Utilizing Adobe Sign for Performance Evaluations

During this virtual/teletworking environment, we recommend that Evaluators engage in **Adobe Sign** to ensure the most secure way of obtaining signatures on finalized performance evaluations. The general performance evaluation workflow process is the same; however, this [workflow chart](#) shows how Adobe Sign has been incorporated into the process. The steps below explain how to use Adobe Sign for finalized performance evaluations. **NOTE: Please remember to complete the appropriate Staff Performance Evaluation form before initiating the evaluation signature workflow in Adobe Sign.**

1. Click on the corresponding **Staff Performance Evaluation Signatures** link to start the form.
2. You will be prompted to log into Adobe Sign.
 - a. In the *email address line*, type in your full saclink email address, including @csus.edu (ex. [xxxxx@csus.edu](#)) (see *figure 1. for the Adobe Sign-In screenshot*).
 - b. Click the **Continue** button.
 - c. You will see an Adobe Sign splash screen as it routes you to the *Adobe Sign Send* page.

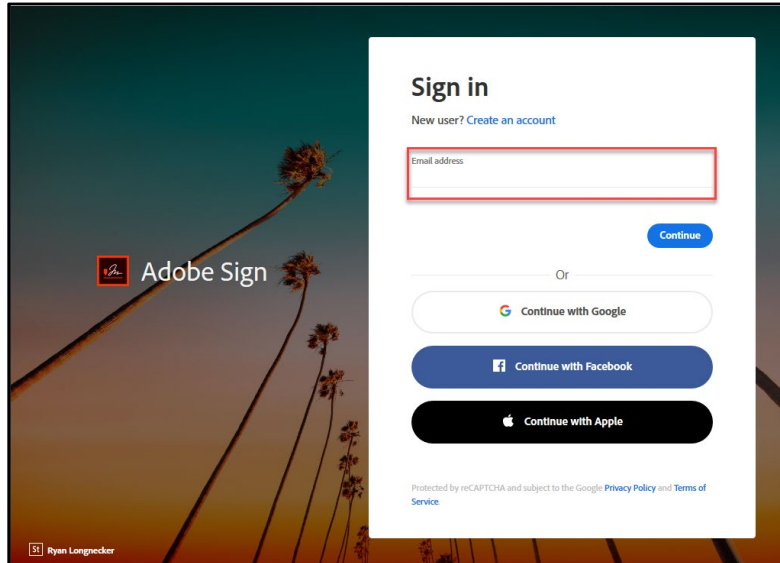


Figure 1. Adobe Sign-In screenshot

3. Once on the *Adobe Sign Send* page (see figure 2. for the *Send* page screenshot)
 - a. Click **More** for a list of required information for this form.
 - b. Navigate to the *Recipient* fields listed and enter the primary email address. To ensure you are using the primary email address, navigate to *directory.csus.edu* to confirm the email address.
 - i. *Employee* field
 - ii. *Rater* field
 - iii. *HEERA Designated Manager* field
 - c. The *Human Resources* email address auto-populates in, and you will not be able to change this.
 - d. Navigate to the *Completed Performance Evaluation* field. Click on *Add File* to attach the completed corresponding employee performance evaluation form. If there are additional documents, attach those in the *Additional Document* field.
 - e. Click the **Send** button to route the form for signature.

The screenshot shows the Adobe Sign interface for sending a document. The document title is "HR_ELRL_Unit 9 Technology Performance Evaluation Signatures". The workflow instructions are: 1. For each signer, enter the email address as published in https://directory.csus.edu. 2. Upload the completed performance review. The "Recipients" section includes fields for "Employee", "Rater (if applicable)", "HEERA Designated Manager", and "Human Resources". The "Human Resources" field is pre-filled with "aba-svc-signelr@csus.edu". The "Document Name" is "Staff Performance Evaluation Signatures". The "Message" is "Please Sign.". The "Files" section includes "Completed Performance Evaluation" and "Additional Document", both with "Add File" buttons. A "Send" button is at the bottom left.

Figure 2. Send page screenshot

4. A thumbnail of the form and confirmation message will display. (see figure 3. Confirmation message screenshot) This message confirms that the evaluation was sent out for signatures. You will also receive an email confirmation that the document was sent to the employee.

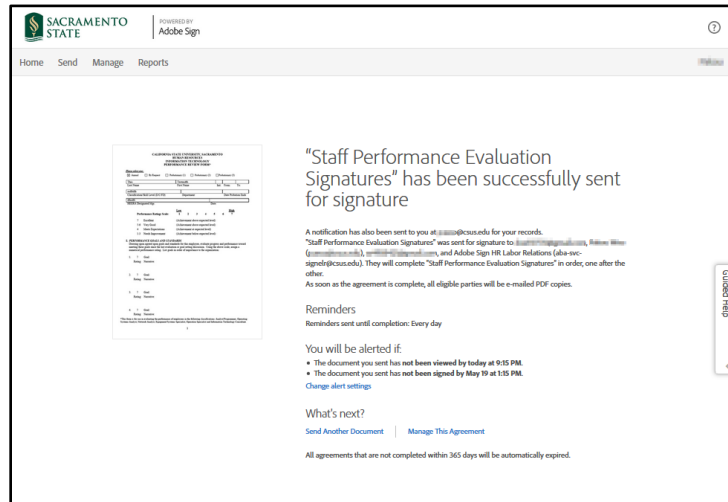


Figure 3. Confirmation message screenshot

5. The employee will receive an email to *Review and sign the Staff Performance Evaluation*. They will need to click on the blue *Review and sign* link in the email, which will route them to log into Adobe Sign to sign their *Performance Evaluation*. (see figure 4. Employee signature request email) Once logged into Adobe Sign, they will click on the yellow tab to navigate and complete all required fields, including the *Signature* field. In the *Signature* field, they will complete the signing process and click on the *Apply* button to place the signature on the form. **(If the employee refuses to sign the evaluation, please instruct them to type in *Refuse to Sign* instead of adding in their signature.)** Finally, the employee will click on the blue **Click to Sign** button to complete their portion of the **Staff Performance Evaluation Signatures** workflow.

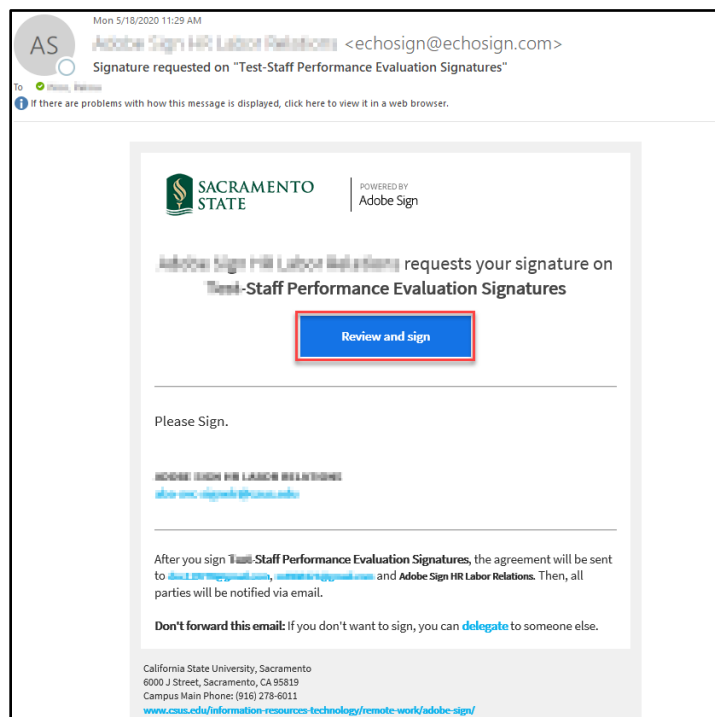


Figure 4. Employee signature request email

6. Once the employee signs (or indicates *Refuse to Sign*) the *Performance Evaluation*, you will receive an email confirmation and instructions from Adobe Sign to complete the next step. Click on the link in the email to sign the *Performance Evaluation*. (see figure 5. Adobe Sign email)

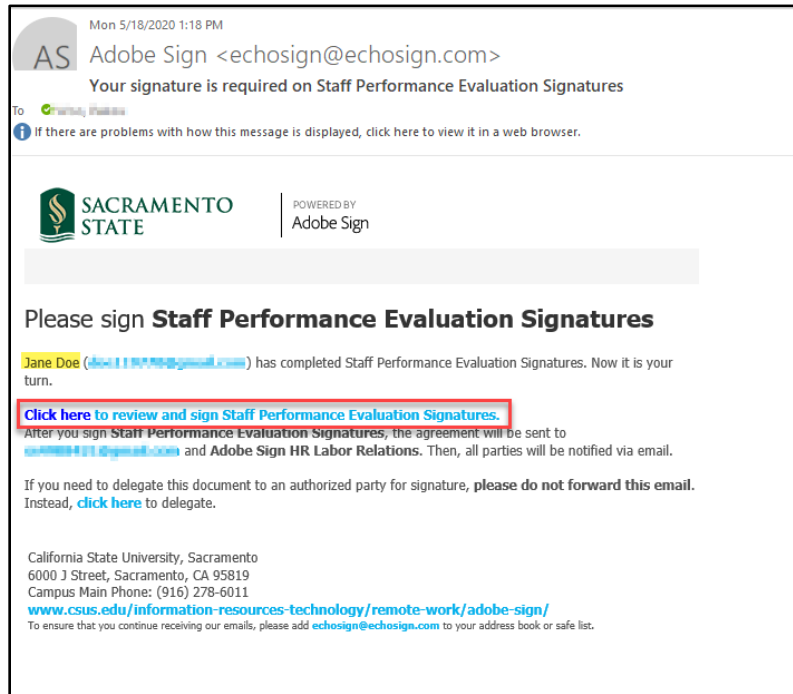


Figure 5. Adobe Sign email

7. You will be prompted to log into Adobe Sign.
 - a. In the *email address line*, type in your full saclink email address, including @csus.edu (ex. xxxxx@csus.edu) (see figure 6. for the Adobe Sign-In screenshot).
 - b. Click the **Continue** button.
 - c. You will be routed to sign the *Performance Evaluation* form.

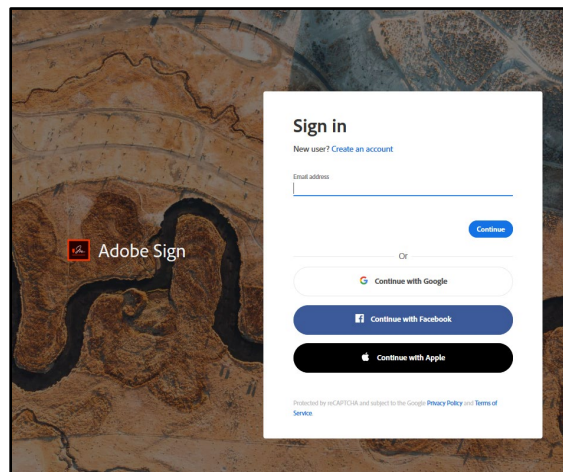


Figure 6. Adobe Sign-In screenshot

8. Once on the form, click the yellow tab to navigate to the required fields and type in your information (see figure 7. for the Staff Performance Evaluation Signature form).

SACRAMENTO STATE | POWERED BY Adobe Sign

Options ▾ Staff Performance Evaluation Signatur... Next Required 1

INFORMATION TECHNOLOGY PERFORMANCE REVIEW SIGNATURE PAGE

VI. SIGNATURES:

I have reviewed this document and discussed it with my supervisor. My signature means I have been advised of my performance status and does not necessarily imply I agree with all the contents of the review.

Jane Doe
Jane Doe (May 18, 2020)
Signature of Employee 05/18/2020
Date

Employee Comments:

Next

* Click here to sign 05/18/2020
Signature of Rater (if applicable) Date

Signature of HEERA designated Manager
 I do not concur with ratings given by Rater Date

ADDITIONAL COMMENTS by HEERA designated Manager

Figure 7. Staff Performance Evaluation Signature form

9. Once you tab to and click on the *Signature* field, the signature screen will display to provide signing options (see figure 8. for Applying signature screenshot).
 - a. Select the method of signing by clicking on **Type**, **Draw**, **Image**, or **Mobile**, and follow the instructions displayed to complete this process.
 - b. After completing the signature process, click the **Apply** button to apply the signature on the form.

Type Draw Image Mobile

Type your signature here

Close Apply

Figure 8. Applying signature screenshot

10. Once your signature is applied, click the blue **Click to Sign** button at the bottom of your screen (see figure 9. the *Click to Sign button screenshot*).



Figure 9. Click to Sign button screenshot

11. A confirmation message will display and routes the document to the next *Recipient* to sign. (see figure 10. *Confirmation message screenshot*) This completes your portion of the **Staff Performance Evaluation Signatures** workflow.

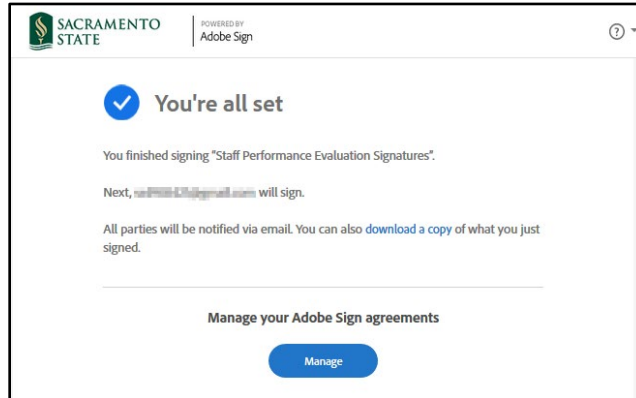


Figure 10. Confirmation message screenshot

12. Once all *Recipients* sign the form and Human Resources accepts it, all recipients will receive an email notification that all parties have signed the form. (see figure 11. *Fully-executed agreement email confirmation*) The **Staff Performance Evaluation Signatures** workflow is now complete. To view the completed Performance Evaluation, click on the link in the email to route you to your Adobe Sign account.

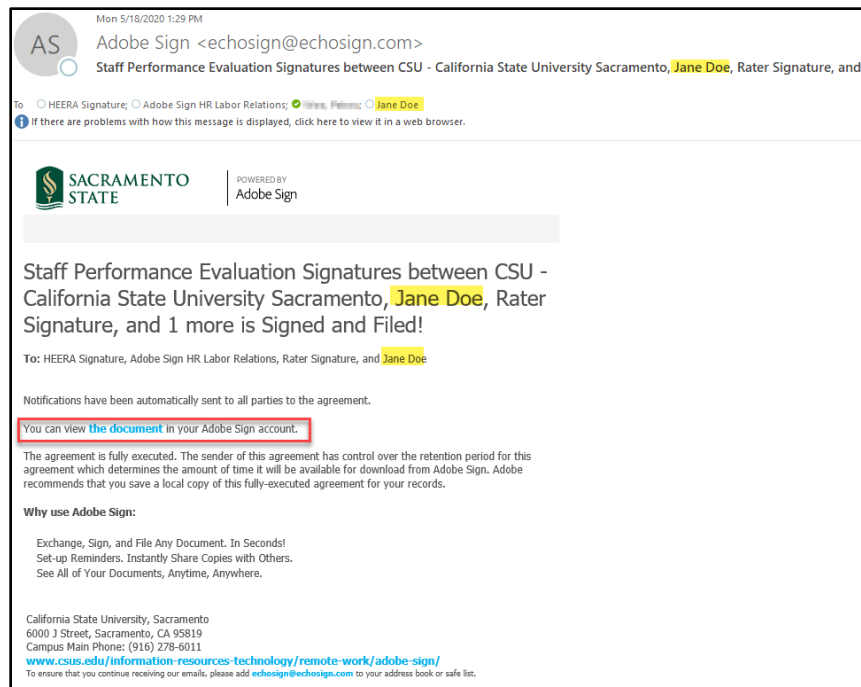


Figure 11. Fully-executed agreement email confirmation