

Staff Performance Evaluation Signatures (Unit 9 - IT positions only)

All performance evaluations must be submitted to Employee & Labor Relations through the established **Acrobat Sign** process described in this User Guide. This [workflow chart](#) shows how Acrobat Sign is used in this process, and the steps below explain how to use Acrobat Sign for finalized performance evaluations. This workflow process includes the Acrobat Sign system **automatically routing** the completed/signed performance evaluation to Employee & Labor Relations for review/processing (no other routing is required).

NOTE: Please remember to download the most current appropriate Staff Performance Evaluation template from the ELR [website](#) *before* initiating the performance evaluation signature workflow in Acrobat Sign.

1. Go to ELR's **Performance Evaluation Signatures via Acrobat Sign** [webpage](#).
2. Click on the corresponding **Link to Acrobat Sign (Evaluators only)** link to start the form.
3. You will be prompted to log into Acrobat 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 Acrobat Sign-In screenshot).
 - b. Click the **Continue** button.
 - c. Log in using your Sac State credentials to complete the Duo Two-Step verification.
 - d. You will see an Acrobat Sign splash screen as it routes you to the *Acrobat Sign Send* page.

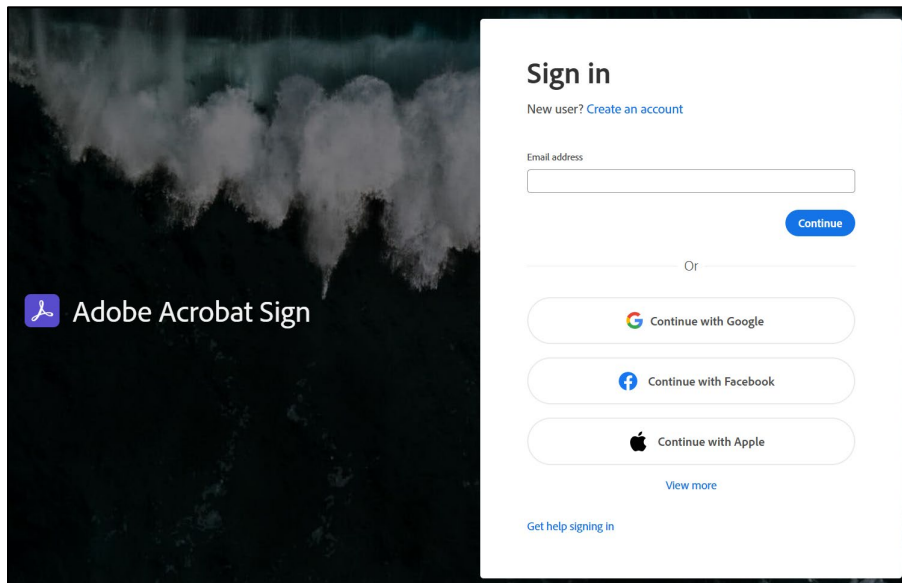


Figure 1. Acrobat Sign-In screenshot

4. Once on the *Acrobat 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. *HEERA Designated Manager* field
 - iii. *Rater (if applicable)* 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.

HR_ELRL Unit 9 Technology Performance Evaluation Signatures

How this workflow works?

1. For each signer, enter the email address as published in <https://directory.csus.edu>.
2. Upload the completed performance review.

Recipients

Employee*

Enter Employee email None

HEERA Designated Manager*

Enter HEERA Designated Manager email None

Rater (if applicable)

Enter Rater (if applicable) email None

Human Resources*

aba-svc-signelr@csus.edu None

CC | Hide

Cc

Enter CC's emails

Document Name*

Staff Performance Evaluation Signatures

Message*

Please Sign.

Files

Completed Performance Evaluation* [Add File](#)

Performance Evaluation Signature HR_ELRL ITU9 PE

Page*

Additional Document [Add File](#)

Send

Figure 2. Send page screenshot

5. 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.

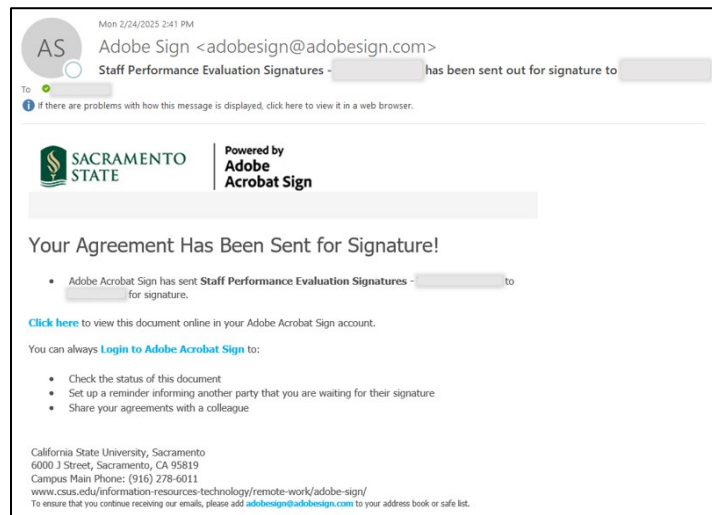


Figure 3. Confirmation message screenshot

6. 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 Acrobat Sign to sign their *Performance Evaluation*. (see figure 4. Employee signature request email) Once logged into Acrobat 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.

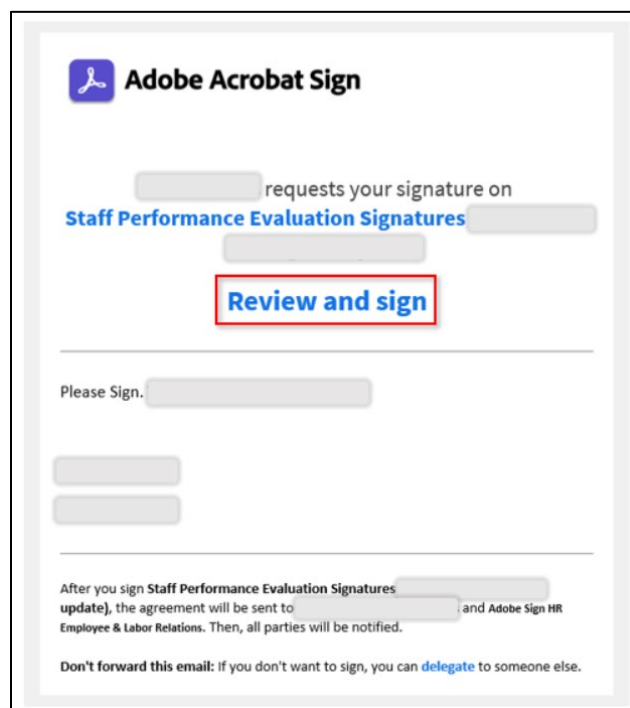


Figure 4. Employee signature request email

7. Once the employee signs “Refuse to sign”) the *Performance Evaluation*, the next signature will be the HEERA Designated Manager. Once the HEERA Designated Manager has signed, you will receive an email confirmation and instructions from Acrobat Sign to complete the last signature step (unless there is no “Rater” and the last signature is the HEERA Designated Manager). Click on the link in the email to sign the *Performance Evaluation*. (see figure 5. Acrobat Sign email)

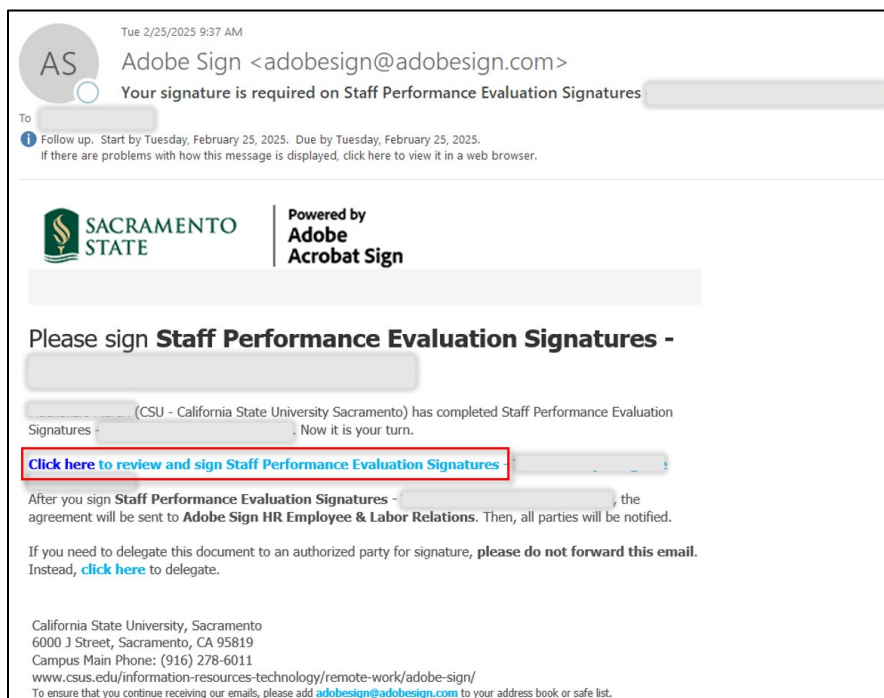


Figure 5. Acrobat Sign email

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

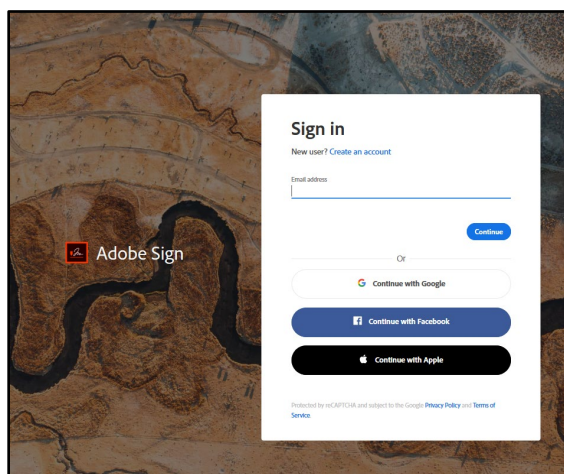


Figure 6. Acrobat Sign-In screenshot

9. 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).

The screenshot shows a web form titled "Staff Performance Evaluation Signature..." with the Sacramento State logo and "POWERED BY Adobe Sign" in the header. A "Next Required 1" indicator is in the top right. The form content includes:

- INFORMATION TECHNOLOGY PERFORMANCE REVIEW SIGNATURE PAGE**
- VI. SIGNATURES:**
- A disclaimer: "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."
- Employee signature section: A signature field with "Jane Doe" and a date field with "05/18/2020". Below these are labels "Signature of Employee" and "Date".
- Employee Comments: A large text area labeled "Employee Comments:".
- Rater signature section: A "Click here to sign" button, a signature field, and a date field with "05/18/2020". Below these are labels "Signature of Rater (if applicable)" and "Date".
- HEERA designated Manager section: A signature field, a date field, and a checkbox labeled "I do not concur with ratings given by Rater".
- ADDITIONAL COMMENT's by HEERA designated Manager: A large text area.

A red box highlights a yellow "Next" button on the left side of the form.

Figure 7. Staff Performance Evaluation Signature form

10. 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).
- Select the method of signing by clicking on **Type**, **Draw**, **Image**, or **Mobile**, and follow the instructions displayed to complete this process.
 - After completing the signature process, click the **Apply** button to apply the signature on the form.

The screenshot shows the "Applying signature" screen. At the top, there are four tabs: "Type", "Draw", "Image", and "Mobile". The "Type" tab is selected. Below the tabs is a large text area with the placeholder "Type your signature here". At the bottom right, there are two buttons: "Close" and "Apply". The "Apply" button is highlighted with a red box.

Figure 8. Applying signature screenshot

11. 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

12. A confirmation message will display indicating that your portion of the **Staff Performance Evaluation Signatures** workflow is complete. (see figure 10. *Confirmation message screenshot*)

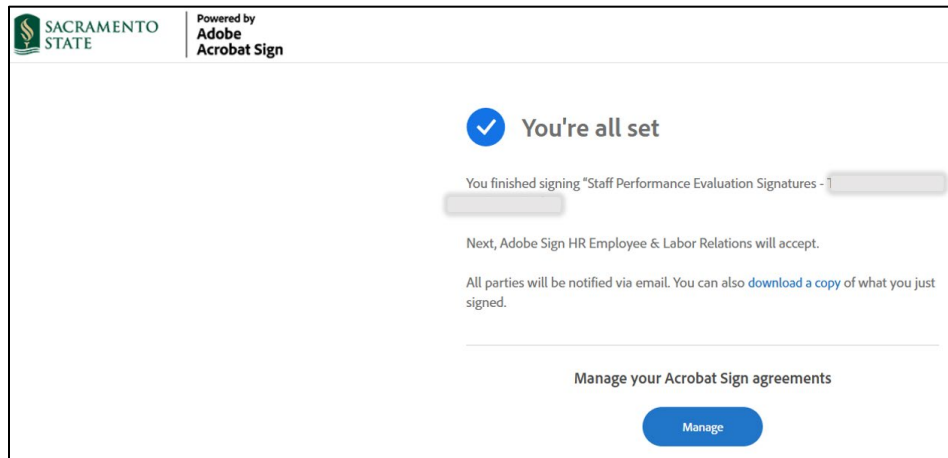


Figure 10. Confirmation message screenshot

13. Once all *Recipients* sign the form and Employee & Labor Relations 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 Acrobat Sign account.

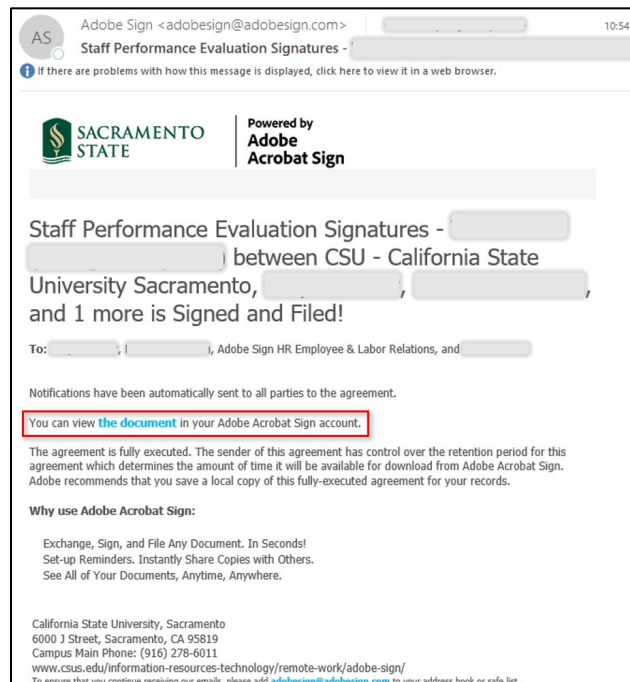


Figure 11. Fully-executed agreement email confirmation