

2020-2021 - DocuSign Performance Evaluation Instructions for Supervisors

Using the Short or Comprehensive Performance Evaluation Process in DocuSign:

Below are the instructions for completing the 2020-2021 Performance Evaluation through an electronic format using DocuSign. This process will allow the supervisor to complete the evaluation form and submit it to the next level supervisor for approval. Following approval, the Performance Evaluation can be reviewed with and acknowledged by the employee and then submitted to Human Resources.

Step 1: Evaluating Supervisor initiates the DocuSign evaluation process.

- The **Evaluating Supervisor** will select the appropriate link from the [Manager's Toolkit](#) that will take them to the DocuSign website to initiate the evaluation process.
- The supervisor will input their own name and email address in the field labeled **Evaluating Supervisor**.
- Then the supervisor will input their manager's name and email address in the section titled **Next Level Supervisor**.
- Next, the supervisor will input the employee's name and email address in the section titled **Employee**.
- Last, the supervisor will input the College/Department's HR Liaison's name and email address in the section titled **College/Department HR Liaison**.
- Ensure email addresses are correct. This information cannot be edited by the supervisor after the process has started.
- After all information is completed, click **Begin Signing**.

PowerForm Signer Information

Fill in the name and email for each signing role listed below.
Signers will receive an email inviting them to sign this document.
Please enter your name and email to begin the signing process.

Evaluating Supervisor

Your Name: *

Your Email: *

Please provide information for any other signers needed for this document.

Next Level Supervisor

Name: *

Email: *

Employee

Name: *

Email: *

College/Department HR Liaison

Name:

Email:

Step 2: Evaluating Supervisor completes required employee performance information.

- The Evaluating Supervisor must complete all employee information fields (Name, CWID, etc..) located at the top of the performance evaluation form.
- Then the supervisor will complete each section of the evaluation and indicate the appropriate rating, to include an employee’s overall rating. Please note any performance rating besides “Meets Expectations” requires comments.
 - If there are goals or other documents to be attached to the evaluation, that option is available. It is noted by a red paperclip in a yellow box.
- **The Evaluating Supervisor and Next Level Supervisor should discuss all comments and ratings prior to the start of the DocuSign Performance Evaluation.** Please note the **Next Level Supervisor** is not able to edit the document or send it back for corrections.
- After the evaluation is digitally signed and finished by the Evaluating Supervisor, it will automatically be emailed the Next Level Supervisor for approval.

THE UNIVERSITY OF ALABAMA
ANNUAL EMPLOYEE PERFORMANCE EVALUATION
Short Form

EMPLOYEE NAME (FIRST, MI, LAST): _____

CWID #: _____ JOB TITLE: _____

DEPARTMENT: _____ DIVISION: -- select --

ORG NUMBER: _____

PERIOD OF EVALUATION: From: May 1, 2020 To: March 31, 2021

TIME IN CURRENT POSITION: _____

DIVISION: -- select --

- President Office
- Academic Affairs
- Advancement
- Community Affairs
- Finance Operations
- Intercollegiate Athletics
- Research
- Student Life

4. Supervisor's Comments Regarding Overall Performance:

Comments:

5. See Attachment for Goals and Objectives, if applicable. Yes No

6. Signatures

Rater: Date: Mar-05-2021

Step 3: Next Level Supervisor reviews and digitally signs for approval.

The Evaluating Supervisor and Next Level Supervisor should discuss all comments and ratings prior to the start of the DocuSign Performance Evaluation. Please note the **Next Level Supervisor** is not able to edit the document or send it back for corrections. After the evaluation is digitally signed and finished by the **Next Level Supervisor**, it will automatically be emailed back to the **Evaluating Supervisor**, who will hold the evaluation until they are ready to meet with the employee.

Step 4: *** *NOTE: It is extremely important that the Evaluating Supervisor does not access the DocuSign link until they are speaking with the employee.* When the **Evaluating Supervisor** opens the link in the DocuSign email the evaluation will automatically send to the employee. ***


The **Evaluating Supervisor** should schedule a telephone, in person or video conference (Zoom, MS Teams, Skype, etc.) with the employee to discuss the performance evaluation.


Step 5: The **Evaluating Supervisor** meets with the **Employee**.

- At this step, the evaluation meeting occurs.
- After both parties have discussed the evaluation, the **Employee** can add comments to the evaluation as well as attach any relevant documents.
- The **Employee** should be given at least **5 business days** to comment, attach any documents, and digitally sign the evaluation. All performance evaluations are due to Human Resources by **May 31, 2021**.
- Once the **Employee** digitally signs and finishes the performance evaluation, all parties involved will receive a completed evaluation with all attachments. Human Resources will automatically receive the completed document.
- If the employee does not sign the document within 10 business days from the meeting, the evaluation will be considered reviewed and completed.

7. Employee Verification of Review: I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional). Attach additional sheets if necessary.

Comments:

 Optional

Employee's Signature:  _____ Date: April 16, 2020

Using the Signature Only Process in DocuSign:

If the supervisor has already prepared an evaluation for the employee using the PDF format of the Short or Comprehensive Performance Evaluation, there is another option in DocuSign for uploading the prepared PDF evaluation to capture signatures.

Step 1: Evaluating Supervisor initiates the DocuSign evaluation process.

- The **Evaluating Supervisor** will select the appropriate link from the [Manager's Toolkit](#) that will take them to the DocuSign website to initiate the evaluation process.
- The supervisor will input their own name and email address in the field labeled **Evaluating Supervisor**.
- Then the supervisor will input their manager's name and email address in the section titled **Next Level Supervisor**.
- Next, the supervisor will input the employee's name and email address in the section titled **Employee**.
- Last, the supervisor will input the College/Department's HR Liaison's name and email address in the section titled **College/Department HR Liaison**.
- Ensure email addresses are correct. This information cannot be edited by the supervisor after the process has started.
- After all information is completed, click **Begin Signing**.
- Evaluating Supervisor will complete all employee information fields (Name, CWID, etc..).
- Evaluating Supervisor will attach the prepared performance evaluation using the red paperclip icon.
- Evaluating Supervisor will enter the overall rating from the completed evaluation.

***** NOTE: You must attach a document in order to move forward in the process. *****

Step 2: Evaluating Supervisor will digitally sign the document. The performance evaluation will then be routed to the Next Level Supervisor for approval.

Step 3: **Next Level Supervisor** reviews and digitally signs for approval.

The Evaluating Supervisor and Next Level Supervisor should discuss all comments and ratings prior to the start of the DocuSign Performance Evaluation. Please note the **Next Level Supervisor** is not able to edit the document or send it back for corrections. After the evaluation is digitally signed and finished by the **Next Level Supervisor**, it will automatically be emailed back to the **Evaluating Supervisor - Hold**.

Step 4: The **Evaluating Supervisor – Hold** should hold the evaluation until they are ready to meet with the employee.

**** NOTE: It is extremely important that the Evaluating Supervisor does not access the DocuSign link until they are speaking with the employee.* When the **Evaluating Supervisor** opens the link in the DocuSign email the evaluation will automatically send to the employee. *******

The **Evaluating Supervisor** should schedule a telephone, in person or video conference (Zoom, MS Teams, Skype, etc.) with the employee to discuss the performance evaluation.

Step 5: The **Evaluating Supervisor** meets with the **Employee**.

- At this step, the evaluation meeting occurs.
- After both parties have discussed the evaluation, the **Employee** can add comments to the evaluation as well as attach any relevant documents.
- The **Employee** should be given at least **5 business days** to comment, attach any documents, and digitally sign the Signature Only document. All performance evaluations are due to Human Resources by **May 31, 2021**.
- Once the **Employee** digitally signs and finishes the performance evaluation, all parties involved will receive a completed evaluation with all attachments. Please save a copy for the employee's file and/or provide a copy to the appropriate people within the department/college division at this time. Human Resources will automatically receive the completed document.
- If the employee does not sign the document within 10 business days from the meeting, the evaluation will be considered reviewed and completed.