DocuSign Introductory Period (IP) Review Instructions for Supervisors

The introductory period review process through DocuSign allows the supervisor to complete the review form in DocuSign, and then conduct the routing of the document for approvals through the system. Once all required individuals have completed the review process, the supervisor can choose the appropriate time to send the review to the employee.

A review must be completed by the end of the introductory period, but no sooner than 1 to 2 weeks before the IP End Date. Refer to the Introductory Period Date chart to verify the correct end date based on the employee’s date of hire into their current position. Failure to complete this process by the Introductory Period End Date will result in the assumption that the employee’s introductory period has progressed satisfactorily.

Concerns with the employee meeting minimum standards to include requests for an extension should be directed to your HR Business Partner prior to completing the review.

IMPORTANT: Once performance review content has been entered into DocuSign, AND the supervisor selects “Finish,” the content CANNOT be returned to the supervisor for additional edits. If further edits need to be made, the introductory period review process will have to be reinitiated from the beginning. As a result, it is strongly recommended that the supervisor discuss the language in the review or draft the review in a word document and share it with required approvers in advance of selecting “Finish.”

Prior to initiating the introductory period review, please review the Introductory Period Review Guidelines in the Performance Management section of the Manager’s Toolkit site located at hr.ua.edu.
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Step 1: Supervisor initiates the DocuSign IP Review process on eligible employees.

- Select the DocuSign Performance Review Forms link from the Performance Management section of the Manager’s Toolkit to access the performance review site.
- Input the employee’s CWID and then confirm that the employee’s name and supervisors’ names are accurate.
- If a supervisor’s name field is vacant or not accurate, please contact the individual assigned to your area to update HDT, a system which houses supervisor information, before proceeding.
- Select Form Type: Introductory Period Review

- **If instructed to do so by your college or department,** input your organizations HR Liaison and/or the Third-Level Supervisor’s name and email address.
  - Click on the Help icon next to each of the optional reviewers to determine which step in the process that individual will be included.
  - When adding the HR Liaison Name 1, some browsers will automatically populate the email address in the remaining HR Liaison email fields, which should be removed.
  - If you do not make any selections for additional reviewers while on this page, you will not be able to add them at a later step in the process.

NOTE: Supervisors should communicate with all necessary parties prior to starting a review. If changes are required, the review will have to be deleted and a new one will need to be submitted.

HR Liaison Name 1

HR Liaison Email 1

Third-Level Supervisor Name

Third-Level Supervisor Email

Resources:
- Coach to Improve Performance
- Introductory Period Review Instructions
- Performance Review Guidelines
- Supervisory Tips for Employee Reviews

Submit
DocuSign Introductory Period (IP) Review Instructions for Supervisors

- After all information is completed, click the Submit button. Doing so will initiate the review form in DocuSign.

**Step 2: Supervisor completes the introductory period review.**

- Review the pre-populated fields to ensure all employee information is accurate. If the information is not accurate, please contact the individual assigned to your area who can assist with any inaccuracies before proceeding.
- Add the IP Begin Date and IP End Date fields. Use the IP Date chart to select the correct End Date based on the employee’s date of hire into their current position.

![IP Date Chart](image)

- Select the appropriate rating
  - Introductory Period or Extended Introductory Period Completed – Performance satisfactory
  - OR
  - Introductory Period or Extended Introductory Period Completed – Some areas of improvement needed

- Add comments regarding overall performance.
  - Describe the employee’s performance that led to a decision regarding their continued employment.
  - Enter any final comments in the Supervisor’s Comments field.
  - If “some areas of improvement needed” is selected, list specific areas which the employee should address.

- Attach any relevant documents to the IP review by using the red paperclip in the yellow box.

- Select Finish Later if you are unable to complete the review at this time. Provide an email address to receive a link to finish the review later. Access the review from that email by clicking on the Review Document button.
• Before selecting Finish, it is strongly recommended that the supervisor discuss the language in the review with required approvers in advance of selecting Finish.
• Once performance review content has been entered into DocuSign, AND the supervisor selects Finish, the content CANNOT be returned to the supervisor for additional edits. If further edits need to be made, the performance review process will have to be reinitiated from the beginning.
  o Should you have to reinitiate a review, send an email to hreval@ua.edu with the Subject “Delete Review – Employee Name”
• After you have digitally signed the review, click Finish.
• Next, you must click Close on the document pop-up, and then Close in the upper right corner of the screen for the review to be move to the next step in the review process.
**Step 3: HR Liaisons and Next Level Reviewers take action.**

- If you have been selected as part of the review process, you will receive an email notifying you that the review is at your step in the process.
- When you receive notification, click on the **Review Document** button in the email to access the review.
- If changes are needed on the review form at this point, **do not move the review forward in the process. Contact the supervisor to initiate a new review form.**
- Select **Finish Later** if you are unable to complete the review process at this time. To access this review later, go to the original email notification and click the **Review Document** button.

- The Next-Level Supervisor can add comments and digitally sign the review.
- All other reviewers in the process will need to select the appropriate radio button for the review to move to the next step in the process.

- Next, **you must click Close** on the pop-up box, and then **Close** in the upper right corner of the screen for the review to go to the next step in the review process.
Step 4: Supervisor prepares for the one-on-one meeting.

- Once all reviewers in the process have taken action, you will receive an email providing access to the review.
• Schedule a time to meet with the employee to discuss their introductory period review.
• Utilizing DocuSign is not intended to replace the face-to-face meeting with the employee.
• Determine when to send the review via DocuSign to the employee.
  o To provide the employee immediate access to the completed review, select “Review is ready to be sent to the employee”, click Finish and then the two Complete buttons.

Step 5: Supervisor meets with the employee to discuss the introductory period review.

• If you chose not to send the review via DocuSign to the employee until after the meeting, you can provide them with a printed copy of the review document.
• After both parties have discussed the review, and the employee has been sent the review through DocuSign, the employee should be given at least 3 business days prior to the IP End Date to comment, attach any documents, and digitally sign the review.
  o To provide the employee immediate access to the completed review, select “Review is ready to be sent to the employee”, click Finish and then the two Complete buttons.

• If a review is not digitally signed and acknowledged by the IP End Date:
  o the review will be considered received and acknowledged, and;
  o the assumption is that the employee’s introductory period has progressed satisfactorily.
• Once the review process is finished, all parties involved will receive an email with the completed review and all attachments. These documents will be added to the employee’s UA personnel file.