

Staff Performance Evaluation Signatures (Unit 4)

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. Under the **APC (Unit 4)** section, 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.

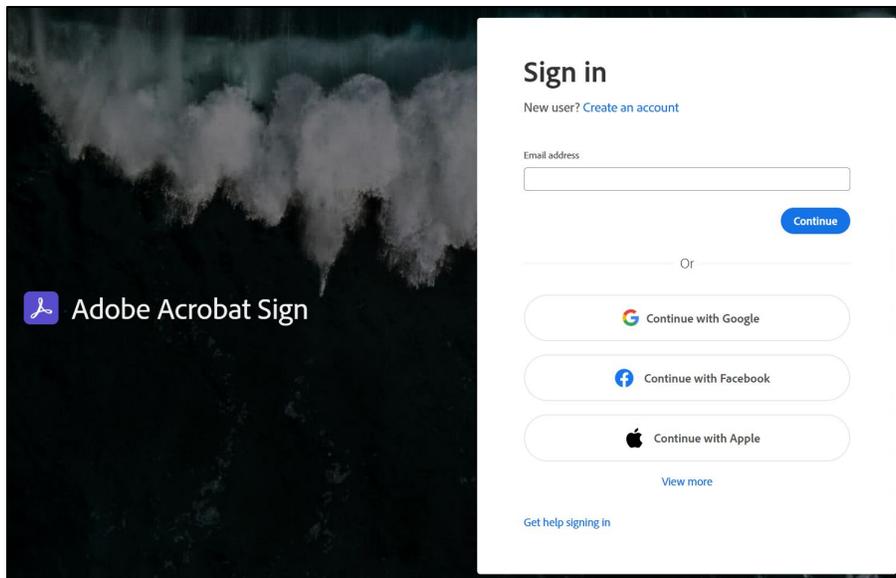


Figure 1. Acrobat Sign-In screenshot

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. *Reviewing Officer* field
 - iii. *Evaluator* 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 4 Performance Evaluation Signatures

How this workflow works?

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

Recipients more ▾

Employee*
 None ▾

Reviewing Officer*
 None ▾

Evaluator*
 None ▾

Human Resources*
 None ▾

CC | Hide

Cc

Document Name *

Message *

Files

Completed Performance Evaluation * Add File

Performance Evaluation Signature HR_ELRL_U4_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.

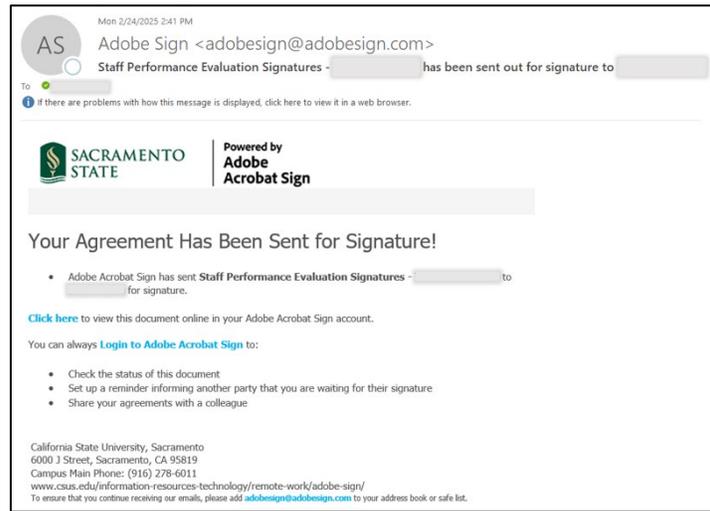


Figure 3. Confirmation message screenshot

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 screenshot*) 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.

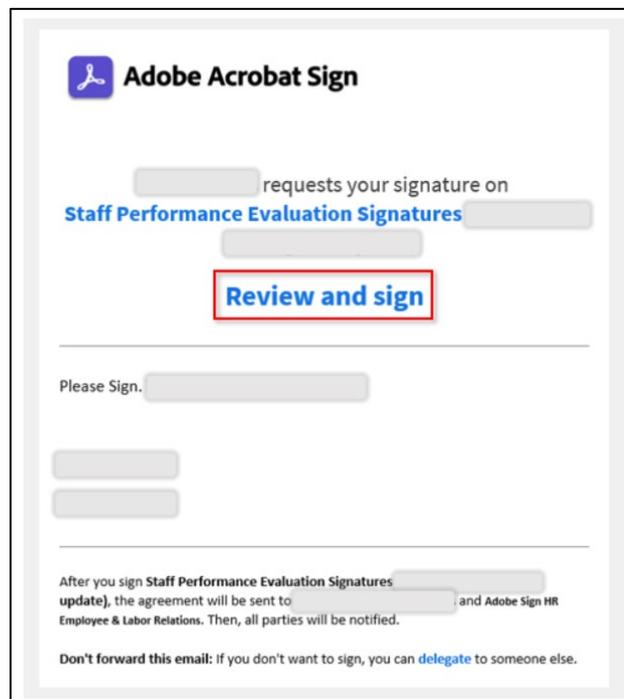


Figure 4. Employee signature request email screenshot

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

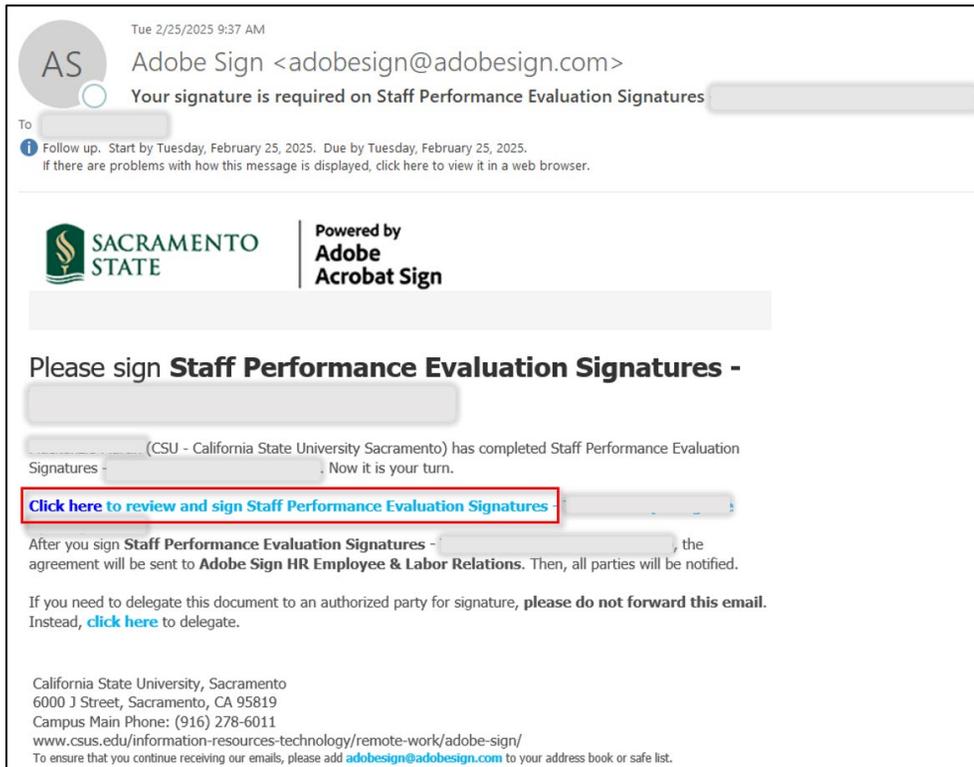


Figure 5. Acrobat Sign email screenshot

8. 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 6. for the Acrobat Sign-In screenshot).
 - b. Click the **Continue** button.
 - c. You will be routed to sign the *Performance Evaluation* form.

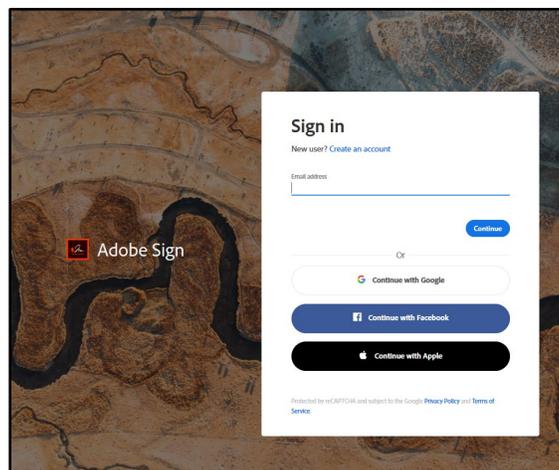


Figure 6. Acrobat Sign-In screenshot

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 screenshot).

The screenshot shows a web-based form for a Staff Performance Evaluation Signature. At the top, it says 'SACRAMENTO STATE' and 'POWERED BY Adobe Sign'. The form title is 'REPORT OF EMPLOYEE PERFORMANCE SIGNATURE PAGE UNIT 4 - ACADEMIC SUPPORT'. A large yellow box is labeled 'Evaluator Comments'. Below this, there are fields for 'Employee's Signature or Acknowledgement' (with a signature of 'Jane Doe' and date '05/28/2020') and 'Date'. There are also fields for 'Name of Evaluator', 'Evaluator Signature', 'Title', and 'Date'. A yellow arrow labeled 'Start' points to the 'Evaluator Comments' box. A yellow tab labeled 'Click here to sign' is highlighted in the 'Evaluator Signature' field.

Figure 7. Staff Performance Evaluation Signature form screenshot

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. It features a red Adobe Sign logo on the left. The main area contains the text 'Type your signature here'. At the top, there are four options: 'Type', 'Draw', 'Image', and 'Mobile'. The 'Type' option is selected. At the bottom right, there are two buttons: 'Close' and 'Apply'.

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*)

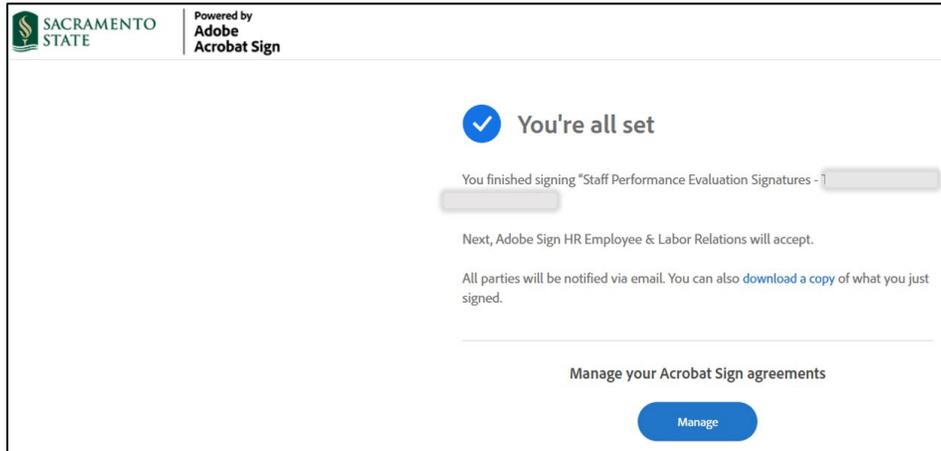


Figure 10. Confirmation message screenshot

13. Once all *Recipients* sign the form and 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 screenshot*) 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.

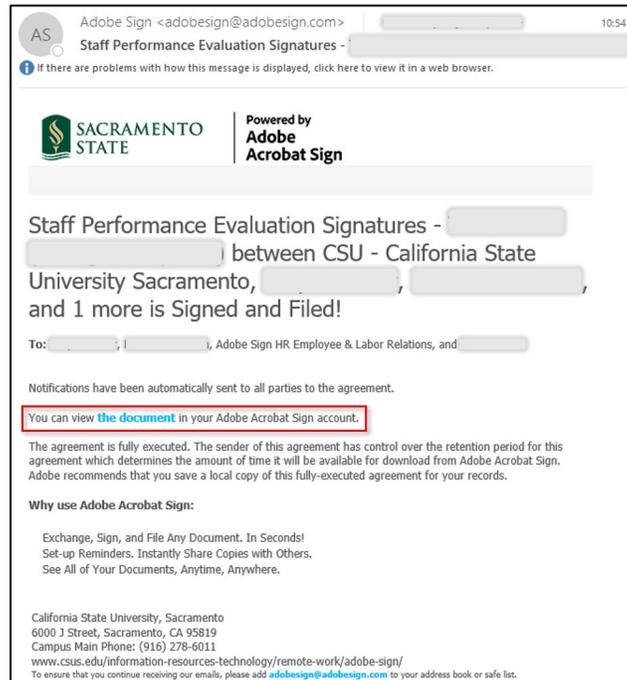


Figure 11. Fully-executed agreement email confirmation screenshot