# DocuSign Performance Review Instructions

1) Once the review form is complete and all parties have had the opportunity to review the information, combine the annual review form along with any supplemental documentation (Tenure, Post Tenure, Merit, etc.) in to one PDF. (Annual Performance Review Form - Faculty & Instructional Academic Staff)

2) Sign into DocuSign (https://app.docusign.com/home).

   DocuSign accounts need to be set up by GB IT before use. If your account has not been created yet, please contact the IT Service Desk before proceeding.

3) Click **Start**, Send an Envelope
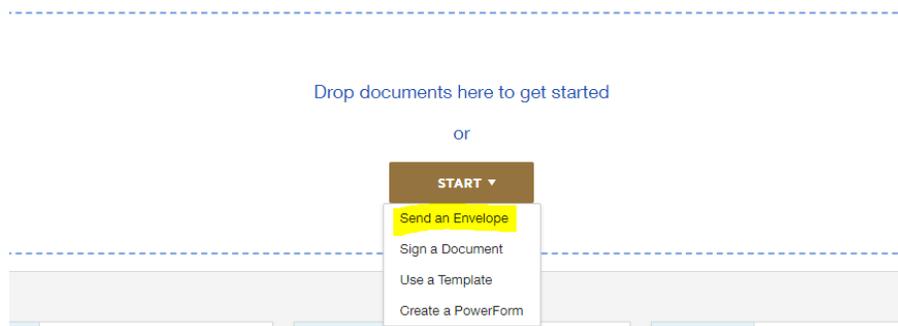
4) Click **Upload** and select completed performance review.
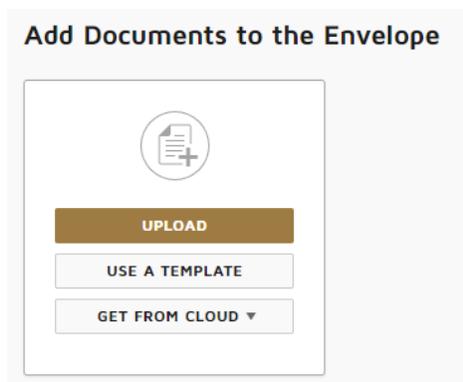
5) Add Recipients to the Envelope:
   - Faculty / Teaching Professor (Individual whose performance is being reviewed)

- Unit / Program Chair (Employee who completed the review)
- Dean
- CC: Human Resources
  - Need to change Human Resources from Needs to Sign to Receives a Copy, this will provide the HR office with a copy once signed by all parties.
  -

Add recipients

☑ Set signing order View | Bulk send **NEW**

1

Name *
👤 Employee Name(First & Last Name)

Email *
Employee Email

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

2

Name *
👤 Unit/Program Chair Name (First & Last Name)

Email *
Unit/Program Chair Email

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

3

Name *
👤 Dean Name (First & Last Name)

Email *
Dean email

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

4

Name *
👤 Humean Resources

Email *
hr@uwgb.edu

CC RECEIVES A COPY ▾   CUSTOMIZE ▾   🗑

👤 ADD RECIPIENT ▾   + ADD DELAY

6) Email Subject: Performance Review – [Employee Last Name]

7) Email Message: See DocuSign Performance Evaluation Email Template for recommended language to use.

8) Click **Next** to customize performance review acknowledgement signatures.

9) Add Signature box and Date Signed box above the Employee acknowledgement line (make sure color/recipient match).

10) Add Signature box and Date Signed box above the Unit/Program Chair acknowledgement line (make sure color/recipient match).

11) Add Signature box and Date Signed box above the Dean acknowledgement line (make sure color/recipient match)

12) Can Preview Document, otherwise click **Send** to email performance review for signature.

13) Once all signatures are completed, DocuSign will send a finalized email to all added recipients (this includes the CC: HR)

DocuSign Performance Review Email Template

Hello [Employee Name],

Here is a copy of the performance evaluation that was discussed with you on [date of performance review meeting]. Please review the entire document and when ready click "sign" under acknowledgements. Once all signatures have been captured you will receive an email with a link to download and save a final version for your records.

Let me know if you have any questions.

Thank you,
[Sender Signature]