

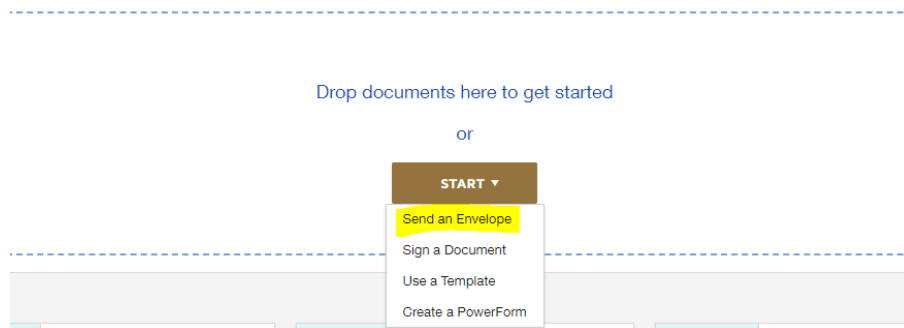


### DocuSign Performance Evaluation Instructions

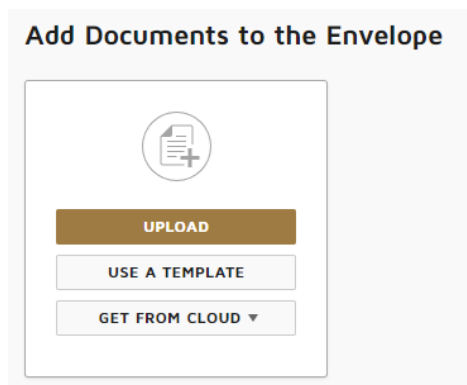
- 1) Once the evaluation is complete and the employee and manager have met to discuss the performance review, compile all relevant documents in to one PDF. ([Performance Evaluation - All Non-Instructional Staff](#) or [Performance Evaluation - Non-Instructional Academic Staff & Limited](#))
- 2) Sign 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:
  - Employee (Individual whose performance is being reviewed)
  - Manager (Employee who completed the review)
  - 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.



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- CC: Next Level Supervisor (if overall performance rating is 'not meeting expectations' or 'partially meeting expectations')
  - Need to change Next Level Supervisor from Needs to Sign to Receives a Copy, this will provide the individual with a copy once signed by all parties.
  - May add private message (Under Customize drop down menu) to Next Level Supervisor, notification that a copy is provided due to overall rating of performance.

## Add recipients ^

Set signing order [View](#) | [Import Bulk List](#)

1

**Name \***

**Email \***

**NEEDS TO SIGN** ▾

**CUSTOMIZE** ▾

2

**Name \***

**Email \***

**NEEDS TO SIGN** ▾

**CUSTOMIZE** ▾

3

Name \*

CC RECEIVES A COPY ▾

CUSTOMIZE ▾

✕

Human Resources

Email \*

hr@uwgb.edu

4

Name \*

CC RECEIVES A COPY ▾

CUSTOMIZE ▾

✕

Next Level Supervisor Name (First & Last Name)

Email \*

Next Level Supervisor Email

Private Message

✕

↑

Providing a copy as informational due to the "Employee Name" having an overall rating of 'Not Meeting Expectations'

Characters remaining: 885

+ ADD RECIPIENT ▾

+ ADD DELAY

- 6) Email Subject: Performance Evaluation – [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).

**Standard Fields**

- Signature
- DS Initial
- Date Signed
- Name
- Email

the review period merits eligibility for compensation increase (equivalent to solid or meritorious performance as outlined in [SYS 1278, UW System Pay Plan Distribution Framework for University Workforce](#)).

Choose an item.

**Acknowledgements:**

I have read the above evaluation and discussed it with my manager. I understand that my signature does not constitute a concurrence or approval but signifies that I have been shown this evaluation.

Employee Signature: Sign ↓ \_\_\_\_\_ Date: Date signed \_\_\_\_\_

**Recipient**

Employee Name ... ▾

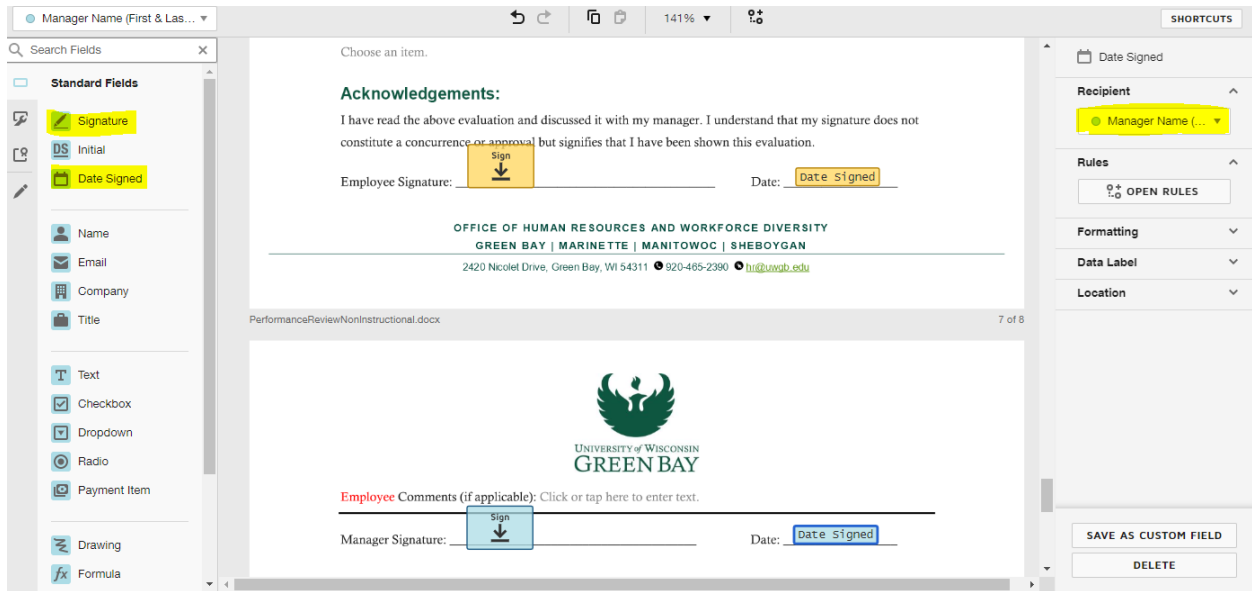
**Rules**

OPEN RULES

**Formatting**

**Data Label**

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



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

12) DocuSign will send the manager three total notifications;

- after the employee 'views' the document
- to indicate Manager's Signature (you) is needed
- once all signatures are completed, a finalized email will be sent out to everyone (this includes the CC: HR and/or Next Level Supervisor)

### *DocuSign Performance Evaluation Email Template*

Hello [Employee Name],

Here is a copy of the performance evaluation that was discussed with you on [date of performance evaluation 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,  
[Manager Name]