

DocuSign Performance Evaluation Instructions

- 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. (<u>Performance Evaluation - All</u> <u>Non-Instructional Staff or Performance Evaluation - Non-Instructional Academic Staff & Limited</u>)
- 2) Sign into DocuSign (<u>https://app.docusign.com/home</u>).

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

3) Click Start, Send an Envelope

Drop doc	cuments here to g	et started
	or	
	START T	
	Send an Envelope	
	Sign a Document	
	Use a Template	
	Create a PowerForm	

4) Click **Upload** and select completed performance review.

UPLOAD	
USE A TEMPLATE	

- 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.



- 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 sig	ining or	rder View Import Bulk List			
1		Name * Employee Name (First & Last Name) Email * Employee Email	🖋 NEEDS TO SIGN ▼	CUSTOMIZE 🔻	Î
2		Name * Manager Name (First & Last Name) Email * Manager Email	✓ NEEDS TO SIGN ▼	CUSTOMIZE 🔻	÷



	Name *	CC RECEIVES A COPY T	CUSTOMIZE V
	Human Resources		
l	Email *		
	hr@uwgb.edu		
	Name *	CC RECEIVES A COPY	CUSTOMIZE 🔻
	Next Level Supervisor Name (First & Last Name)		
H	Email *		
	Next Level Supervisor Email		
P	Private Message		Î
	rouiding a copy as informational due to the "Employee Name" boying	a an overall rating of 'Net Meeting Fr	vnostations!
l''	oviding a copy as informational due to the "Employee Name havin	g an overain ading of Not weeting L	Apectations
Cha	aracters remaining: 885		

- 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	the review period merits eligibility for compensation increase (equivalent to solid or meritorious performance as outlined in <u>SYS 1278, UW System Pay Plan Distribution Framework for University Workforce</u>).	Recipient	^
9	Z Signature	Choose an item.	Employee Name	•
2	DS Initial	Acknowledgements:	Rules	^
N ²		I have read the above evaluation and discussed it with my manager. I understand that my signature does not	0.* OPEN RULES	
	Name constitu	constitute a concurrence or approval but signifies that I have been shown this evaluation. Sign	Formatting	~
	Email	Employee Signature: Date: Date: Date:	Data Label	~

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



•	Manager Name (First & Las ។	5 C To D 141% - St		SHORTCUT	rs
Q s	earch Fields	Choose an item.	^	📋 Date Signed	
-	Standard Fields	Acknowledgements: I have read the above evaluation and discussed it with my manager. I understand that my signature does not		Recipient Manager Name (🔻	^
2	DS Initial	Employee Signature:		Rules	^
	Name	OFFICE OF HUMAN RESOURCES AND WORKFORCE DIVERSITY GREEN BAY MARINETTE MANITOWOC SHEBOYGAN		Formatting	~
	🔄 Email	2420 Nicolet Drive, Green Bay, WI 54311 ● 920-465-2390 ● hri@uwab.edu		Data Label	~
	📕 Company			Location	~
	Title	PerformanceReviewNonInstructional.docx 7 of 8			
	T Text Checkbox				
	Dropdown	Turner (Theorem			
	Radio	GREEN BAY			
	Payment Item	Employee Comments (if applicable): Click or tap here to enter text.	Ŀ		
	Z Drawing	Manager Signature: Date: Date:		SAVE AS CUSTOM FIELD	
	fx Formula		₩ F	DELETE	

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]