California State University SAN MARCOS

OFFICE OF HUMAN RESOURCES

Performance Evaluation Signature and Submission Instructions

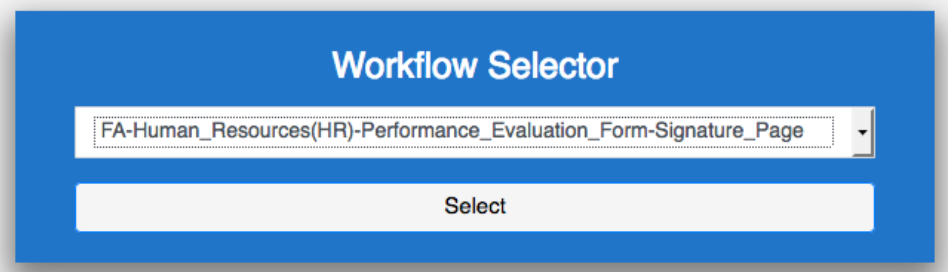
1. Complete the evaluation process as usual

a. After the draft evaluation and development plans (as appropriate) have been reviewed and are ready for signature as the final evaluation, initiate the AdobeSign process to route the documents to all parties for signature.

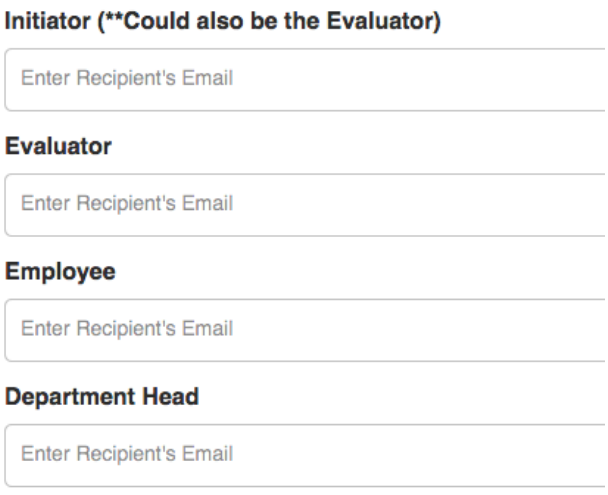
2. Initiate the signature process

a. The Evaluator or designated individual will initiate this process through the HR Workflow Selector page. (https://adobesigndynamicworkflow.csusm.edu/hr)

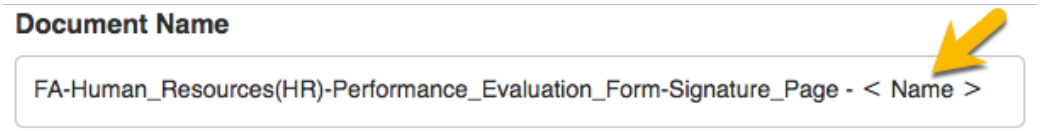
b. Select: 'FA-Human_Resources(HR)-Performance_Evaluation_Form-Signature_Page'



c. Fill in the email addresses for each signing role listed below:



d. Enter the name of the employee being evaluated in the < Name > section in the 'Document Name' field.



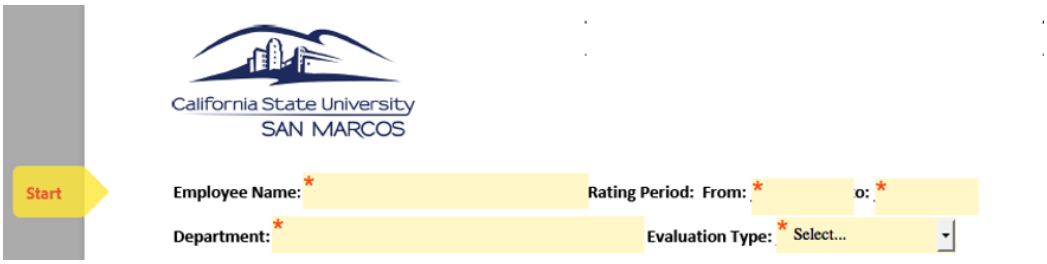
e. Click the blue "Submit" button at the bottom.

The Initiator* (who may also be the Evaluator) will be sent an email from "Esign HR Service Account". Upon receiving the email, click on the blue "Review and fill out" button. You will then be directed to sign in using your CSUSM Username and Password.

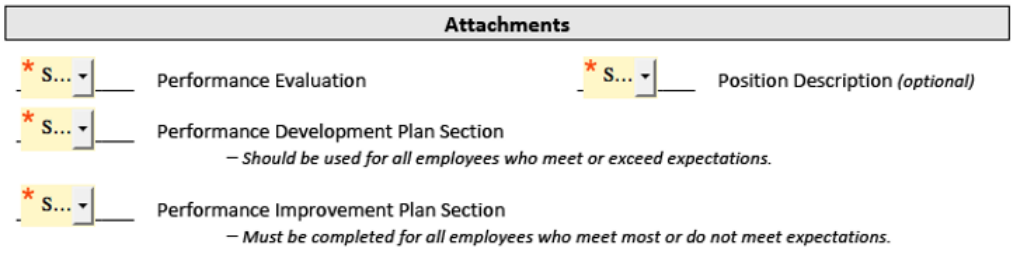
3. Initiator* completes the Cover Page and attaches documents

a. Enter the general information in the highlighted sections on the top of the form:

- Employee Name
- Rating Period
- Department
- Evaluation Type

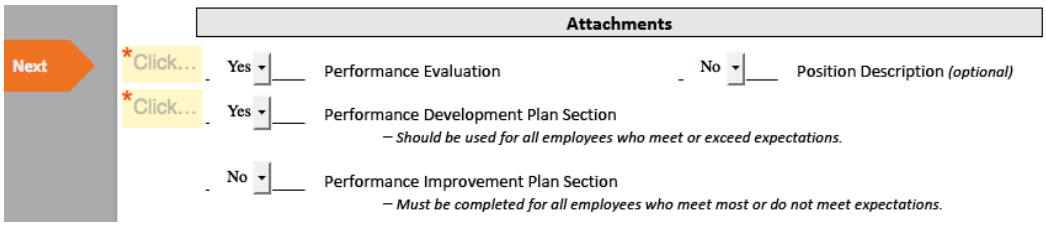


b. Indicate what documents will be attached By clicking "Yes" or "No" from the dropdown list

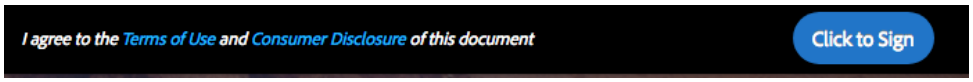


c. Attach documents by clicking on the highlighted section next to each item and selecting the appropriate document from your files.

- Appropriate Performance Evaluation Form
- Professional Development Plan or Performance Improvement Plan
- Position Description (optional: if job duties have changed)



d. Click on the blue "Click to Sign" button at the bottom of the page.



The Evaluator will be sent an email from "Esign HR Service Account". Upon receiving the email, click on the blue "Review and sign" button. You will then be directed to sign in using your CSUSM Username and Password.

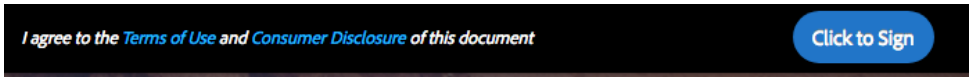
4. Evaluator reviews the document(s) and signs

a. Officially sign the document as the Evaluator after reviewing and confirming the information entered/attached above is accurate.

- If it's your first time to sign a document in this program, you will need to create a signature. Otherwise, it will pre-populate the 'Name' and 'Signature' fields once you click the 'Sign' field.



b. Click on the blue "Click to Sign" button at the bottom of the page.

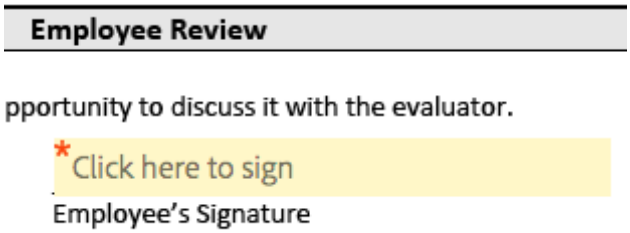


The Employee will be sent an email from "Esign HR Service Account". Upon receiving the email, click on the blue "Review and sign" button. You will then be directed to sign in using your CSUSM Username and Password.

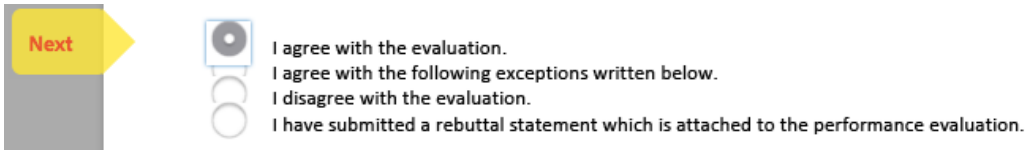
5. Employee reviews the document(s) and signs

a. Officially sign the document as the Employee after reviewing.

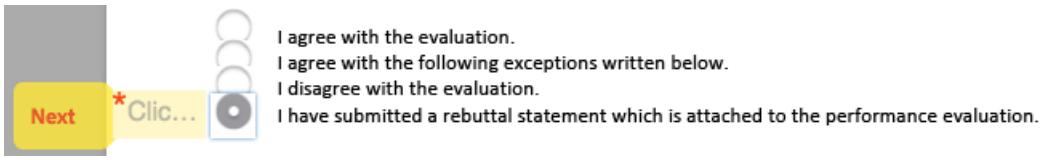
- You should have already received a draft evaluation and been provided the appropriate time to review and provide input. If you did not, please discuss this with the Evaluator prior to signing.
- If it's your first time to sign a document in this program, you will need to create a signature. Otherwise, it will pre-populate the 'Name' and 'Signature' fields once you click the 'Sign' field.



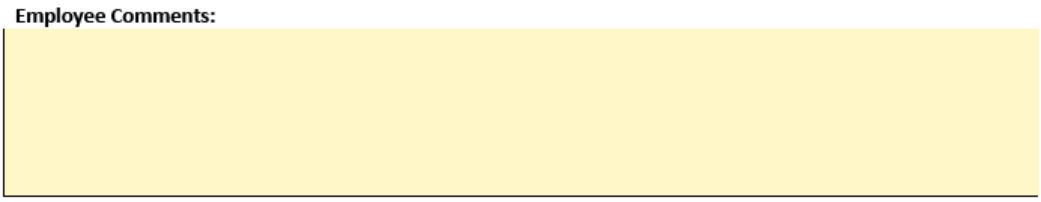
b. Select the appropriate field indicating if you agree or disagree with the evaluation.



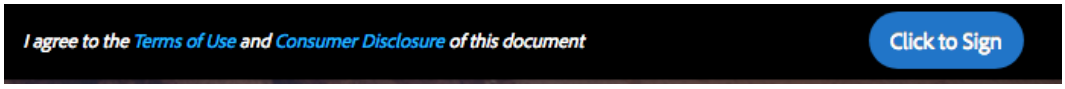
c. Attach a Rebuttal Statement (optional)



d. Adds comments (optional)



e. Click on the blue "Click to Sign" button at the bottom of the page.

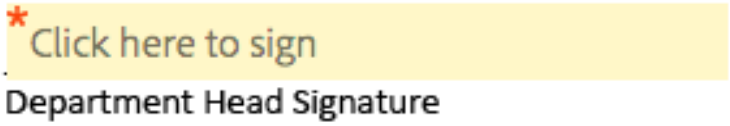


The Department Head will be sent an email from "Esign HR Service Account". Upon receiving the email, click on the blue "Review and sign" button. You will then be directed to sign in using your CSUSM Username and Password.

6. Department Head* reviews the document(s) and signs

a. Officially sign the document as the Department Head after reviewing.

- *In some cases may also be the Evaluator



7. Email confirmations of completed signatures

a. All parties will receive an email from "CSU – San Marcos" indicating that the process is complete.

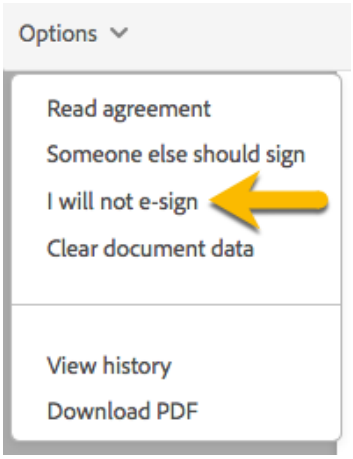
b. Click on the blue "Open Agreement" button to view the final documents.

c. You may choose to print or save the file for your reference.

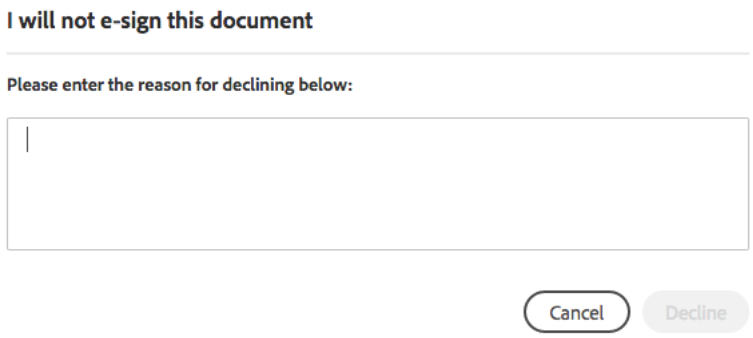
8. The Office of Human Resources will automatically receive the completed evaluation

d. The process is now complete.

Please note: At any time during the process, any Signer can cancel the agreement by clicking the 'Options -> I will not e-sign' option in the top left corner.



They will be prompted to enter a declining reason.



Everyone that has already signed, plus the Initiator, will receive an email stating the agreement was cancelled along with the reason given.

We are here to help! Please send questions about this process to hr@csusm.edu