

# How-To: Send Employee Performance Evaluations Via Adobe Sign

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## 1. Introduction

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Due to the Covid-19 pandemic, this year's annual personnel evaluations will be signed electronically using Adobe Sign.

The documents will be signed by the employee and the appropriate administrator. Raters and designated evaluators will not sign the form this year, but they can fill out the forms and send to the appropriate administrator to route the form.

## 2. Evaluation Routing

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The rater, designated evaluator or the appropriate administrator should:

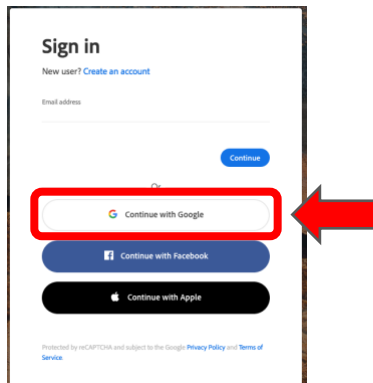
- A. Download the appropriate form from the [Staff and Management Evaluations page](#) in the Human Resources website.
- B. Send the DRAFT EVALUATION, as well as any attachments, to the employee for review, input, and discussion **via email**.
- C. Make sure that all the fields are selected as Not Rated or N/A where appropriate.
- D. Once the DRAFT EVALUATION has been reviewed by the employee:
  - a. If the DRAFT EVALUATION was filled by the rater or designated evaluator, **do NOT sign**. Just **send it, along with any attachments, via email** to the appropriate administrator.
  - b. The appropriate administrator **should not sign the FINAL EVALUATION** yet. Instead, **follow the instructions in step 3**.
- E. At that moment, the FINAL EVALUATION will be routed in order as follows:
  - a. Appropriate Administrator – *Send Documents via Adobe Sign*
  - b. Employee – *Signature via Adobe Sign*
  - c. Appropriate Administrator – *Signature via Adobe Sign*
  - d. Human Resources – *Receipt via Adobe Sign, log, and place in personnel file*

### 3. Sending Final Evaluation for Signatures Using Adobe Sign

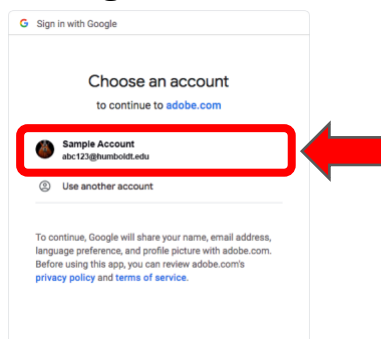
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#### A. The appropriate administrator starts the Adobe Sign workflow

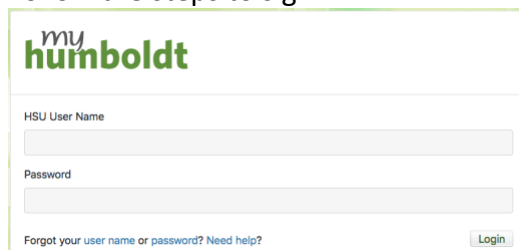
- a. Have the Final Evaluation and any attachments saved on your computer. Please make sure that all attachments are saved as one pdf file as you are limited to upload just one attachment file.
- b. Click the appropriate link for the type of staff performance evaluation:  
[Permanent](#), [Temporary](#), [Probationary](#).
- c. You'll be asked to sign in:
  - I. Click the "Continue with Google" button.



- II. Select your Humboldt University account. Remember it should be in the abc123@humboldt.edu format.



- III. If you haven't logged before to myhumboldt.edu, you'll be prompted to sign in. Follow the steps to sign in.



- d. The appropriate Adobe Sign Performance Evaluations Workflow will open.  
*This example shows the Permanent Staff Annual Performance Evaluation Workflow, but all*

*three evaluations look the same.*

Staff Annual Performance Evaluation Workflow

How this workflow works?  
1. Type the Employee's email in the Employee field using the abc123@humboldt.edu format. If you fail to use this format, the employee won't be able to log in using the HSU Adobe Sign account.

**Recipients**

Employee \*

Enter recipient email  [Email](#)

Appropriate Administrator \*

Enter recipient email  [Email](#)

HR \*

[Email](#)

**Document Name \***

Staff Annual Performance Evaluation

**Options**

☐ Set Reminder

**Message \***

Please Sign the document in the appropriate fields on the Staff Annual Performance Evaluation Signatures page.

**Files**

Staff Annual Performance Evaluation Form [Add File](#)

Attachment [Add File](#)

Signatures [Add File](#) Staff Annual Performance Evaluation Signatures

[Send](#)

- I. Type the Employee's email in the "Employee" field **using the abc123@humboldt.edu format**. If you fail to use this format, the employee won't be able to log in using the HSU Adobe Sign account.

Employee \*

Enter recipient email  [Email](#)

- II. Type your email in the "Appropriate Administrator" field **using the abc123@humboldt.edu format**.

Appropriate Administrator \*

Enter recipient email  [Email](#)

- III. Skip the "HR", "Document Name", and "Message fields".

HR \*

[Email](#)

**Document Name \***

Staff Annual Performance Evaluation

**Options**

☐ Set Reminder

**Message \***

Please Sign the document in the appropriate fields on the Staff Annual Performance Evaluation Signatures page.

- IV. Click the "Add File" link in the Evaluation Form field inside the Files section.

**Files**

Staff Annual Performance Evaluation Form [Add File](#)

Attachment [Add File](#)

Signatures [Add File](#) Staff Annual Performance Evaluation Signatures

- i. A Select Files window will open. Click the "Choose Files from My Computer" button.

Select Files

Library Documents

**My Computer**

Document Cloud

Cloud Storage

Box

Dropbox

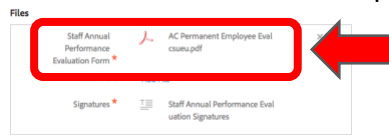
Google Drive

[Choose Files from My Computer](#)

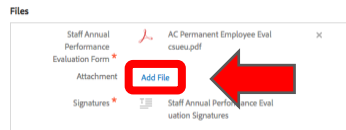
[Cancel](#) [Open](#)

- ii. Select your Performance Evaluation Form in your hard drive, and click open.

iii. The Document's name will appear in the Evaluation Form field.



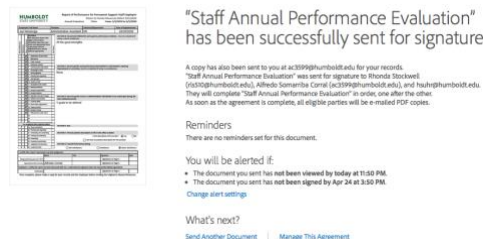
V. If you have an attachment file, click the Add File link in the Attachment field and follow the same procedure to add a file as step 3.d.IV.i above.



VI. Click the "Send" button at the bottom of the screen.



VII. The window will display a successful message and you'll receive an email from Adobe Sign stating that your agreement has been sent for signature!

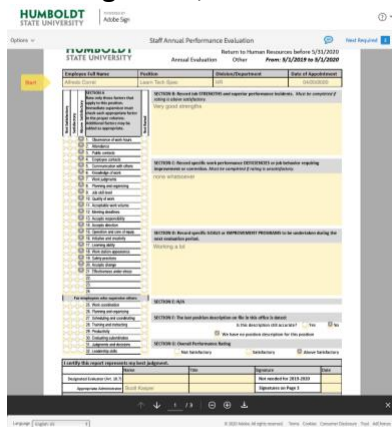


## B. The Employee continues the workflow

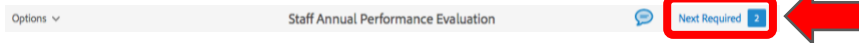
- The employee will receive an email from Adobe Sign with a link to the document.
- Click the "Review and sign" button in the email.

**Review and sign**

- You'll be asked to log in. Please follow the instructions in step 3.c
- Once signed in, the FINAL EVALUATION and any attachments will open in your browser.



- e. Review the entire **FINAL EVALUATION** and any attachments to verify that all the information is the same as you reviewed in the **DRAFT EVALUATION**.
- f. Click the “Next Required” link on the top-right corner of the document or scroll down to the Staff Annual Performance Evaluation Signatures page.



- g. Your name will be pre-filled in the Staff Annual Performance Evaluation Signatures page.

Signatures for Annual Evaluation From: 5/1/2019 to 5/1/2020			
Name	Title	Signature	Date
Rate		Not needed for 2019/2020	
Appropriate Administrator			
Employee: I certify this report has been discussed with me. I understand my signature does not necessarily indicate agreement.			
First Name Last Name	*Enter your job title	*Click here to sign	04/23/2020

- h. Type your Title in the Title field of the Employee line.

- i. Click the Signature Field in the Employee line.

- j. A Signature window will open.

- I. If you haven't used Adobe Sign before, you can have the option to type your name, draw a signature with your mouse, add an scanned signature image from your computer, or create a signature on your mobile device.

- II. Click the “Apply” button.

- k. Click the “Click to Sign” button at the bottom of the screen.



- l. The window will display a successful message and your part of the workflow is done.

### C. The Appropriate Administrator continues the workflow

- The appropriate administrator will receive an email from Adobe Sign with a link to the document.
- Follow the instructions from Step B.b to B.f.
- Your name will be pre-filled in the Staff Annual Performance Evaluation Signatures page.

Signatures for Annual Evaluation From: 5/1/2019 to 5/1/2020				
	Name	Title	Signature	Date
Rater			Not needed for 2019/2020	
Appropriate Administrator	Sample Appropriate Admin	*Enter your job title	*Click here to sign	04/24/2020
Employee: I certify this report has been discussed with me. I understand my signature does not necessarily indicate agreement.				
	Sample Account	Office Manager	Alinda Standwell	04/24/2020

- Type your Title in the Title field of the Appropriate Administrator line.

Appropriate Administrator	Sample Appropriate Admin	*Enter your job title	*Click here to sign	04/24/2020
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- Click the Signature Field in the Appropriate Administrator line.

Appropriate Administrator	Sample Appropriate Admin	*Enter your job title	*Click here to sign	04/24/2020
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- Follow the instructions from Step B.j to B.l

### D. The Human Resources department continues the workflow

- The Human Resources department will receive the FINAL EVALUATION document with all the signatures.
- The Appropriate Administrator and the Employee will also receive the signed document receive as an attachment in an email from Adobe Sign once Human Resources accepts it.