

## **Business Process Guide: Performance Evaluation for MPPs in DocuSign**


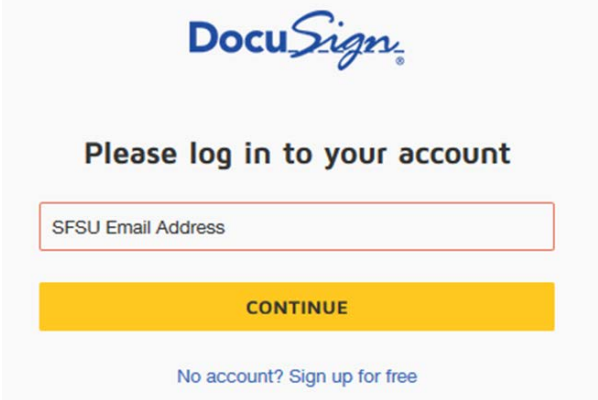
### **Overview**

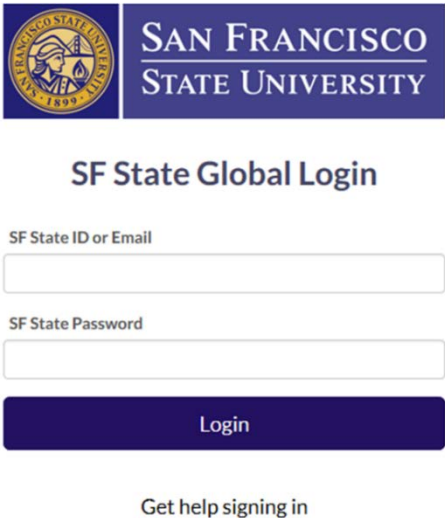
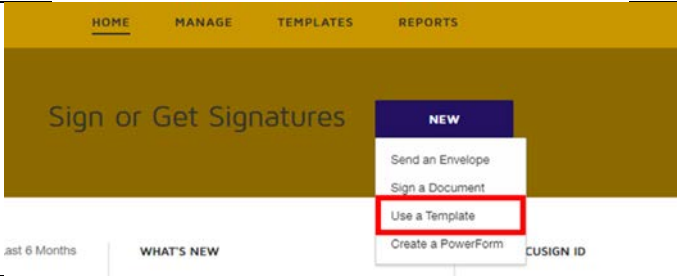
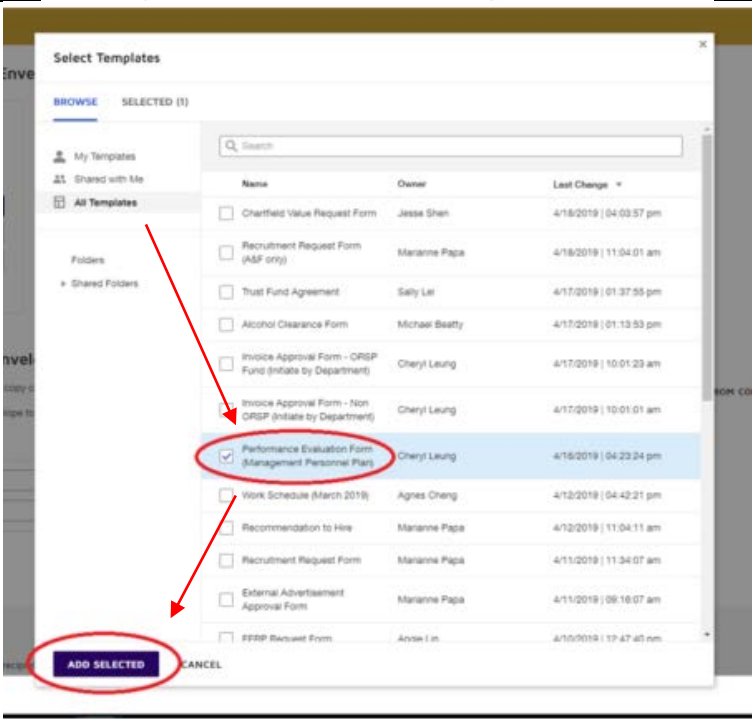
This document provides step by step instructions to complete the Performance Evaluation Form for MPPs through DocuSign.

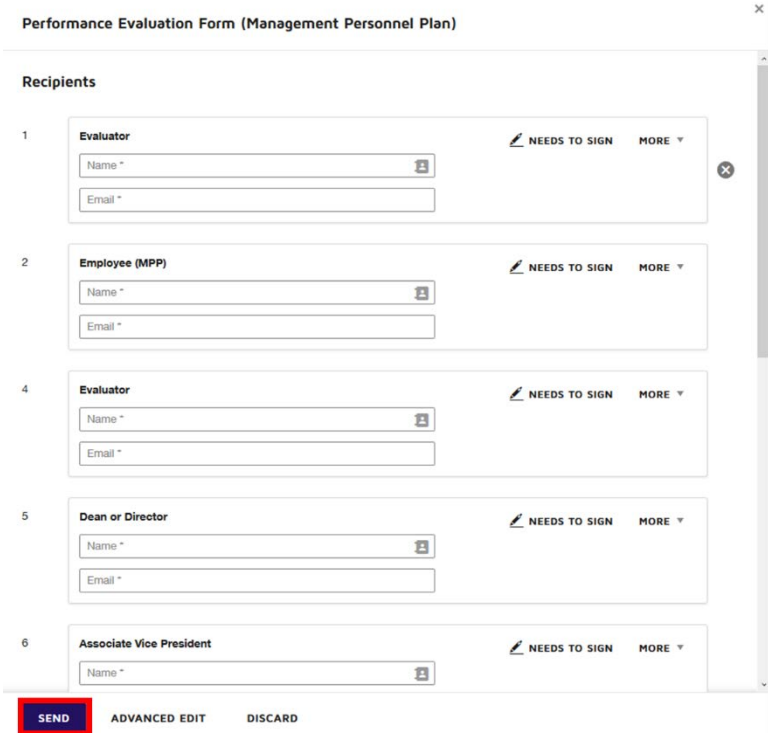
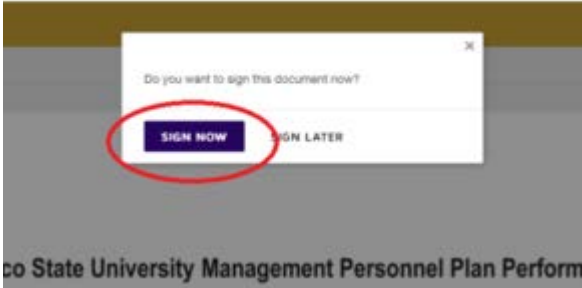

For general questions regarding Performance Evaluation, please contact Labor and Employee Relations at [elr@sfsu.edu](mailto:elr@sfsu.edu).





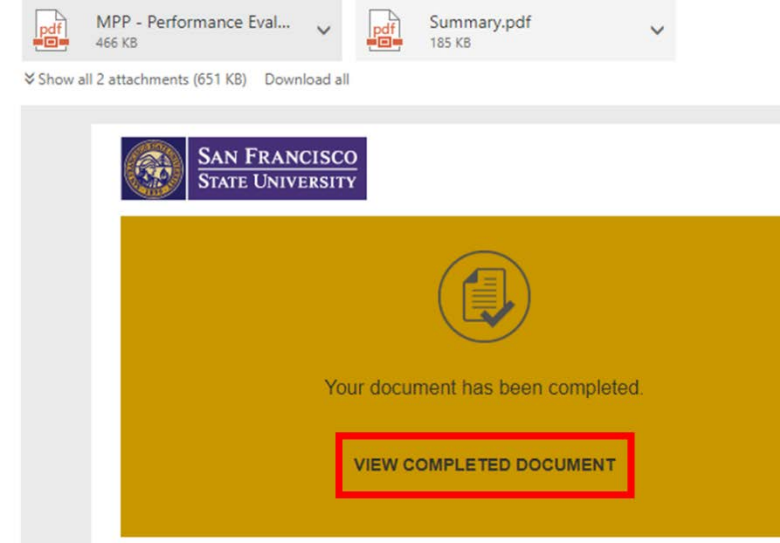
For general questions regarding DocuSign, please visit [DocuSign @ San Francisco State](#) or contact Quality Assurance at [gateam@sfsu.edu](mailto:gateam@sfsu.edu).

### **Procedures for Evaluator**

<b>Steps</b>	<b>Examples</b>
1. To access SFSU’s DocuSign homepage, please go to <a href="https://account.docusign.com/">https://account.docusign.com/</a>	
2. Enter your <b>SFSU email address</b> and select <b>CONTINUE</b> .	

Steps	Examples																																							
<p>3. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	 <p>The screenshot shows the 'SF State Global Login' page. It features the San Francisco State University logo at the top. Below the logo are two input fields: 'SF State ID or Email' and 'SF State Password'. A blue 'Login' button is positioned below the password field. At the bottom of the page, there is a link that says 'Get help signing in'.</p>																																							
<p>4. From the DocuSign homepage, click on the <b>NEW</b> button and then select <b>USE A TEMPLATE</b> from the drop down menu.</p>	 <p>The screenshot shows the DocuSign homepage with a yellow header. The main heading is 'Sign or Get Signatures'. A blue 'NEW' button is visible, with a dropdown menu open below it. The dropdown menu contains four options: 'Send an Envelope', 'Sign a Document', 'Use a Template' (which is highlighted with a red box), and 'Create a PowerForm'. Other elements include navigation tabs for 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS', and a 'CUSIGN ID' field.</p>																																							
<p>5. Click on <b>ALL TEMPLATES</b>, check the <b>PERFORMANCE EVALUATION FORM (MANAGEMENT PERSONNEL PLAN)</b> box, and then click <b>ADD SELECTED</b>.</p>	 <p>The screenshot shows a 'Select Templates' dialog box. On the left, there is a sidebar with 'All Templates' selected. The main area is a table with columns for 'Name', 'Owner', and 'Last Change'. The 'Performance Evaluation Form (Management Personnel Plan)' is selected, indicated by a checked checkbox and a blue highlight. A red circle is drawn around this row. At the bottom of the dialog, there are two buttons: 'ADD SELECTED' (highlighted with a red circle) and 'CANCEL'. A red arrow points from the 'ADD SELECTED' button to the selected row.</p> <table border="1" data-bbox="850 1331 1360 1808"> <thead> <tr> <th>Name</th> <th>Owner</th> <th>Last Change</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Charterfield Value Request Form</td> <td>Jesse Shan</td> <td>4/18/2019   04:03:57 pm</td> </tr> <tr> <td><input type="checkbox"/> Recruitment Request Form (ASF only)</td> <td>Marianne Papa</td> <td>4/18/2019   11:04:01 am</td> </tr> <tr> <td><input type="checkbox"/> Trust Fund Agreement</td> <td>Sally Lei</td> <td>4/17/2019   01:37:55 pm</td> </tr> <tr> <td><input type="checkbox"/> Alcohol Clearance Form</td> <td>Michael Beatty</td> <td>4/17/2019   01:13:53 pm</td> </tr> <tr> <td><input type="checkbox"/> Invoice Approval Form - CRSP (Instate by Department)</td> <td>Cheryl Leung</td> <td>4/17/2019   10:01:23 am</td> </tr> <tr> <td><input type="checkbox"/> Invoice Approval Form - Non CRSP (Instate by Department)</td> <td>Cheryl Leung</td> <td>4/17/2019   10:01:01 am</td> </tr> <tr> <td><input checked="" type="checkbox"/> Performance Evaluation Form (Management Personnel Plan)</td> <td>Cheryl Leung</td> <td>4/16/2019   04:23:24 pm</td> </tr> <tr> <td><input type="checkbox"/> Work Schedule (March 2019)</td> <td>Agnes Cheng</td> <td>4/12/2019   04:42:21 pm</td> </tr> <tr> <td><input type="checkbox"/> Recommendation to Hire</td> <td>Marianne Papa</td> <td>4/12/2019   11:04:11 am</td> </tr> <tr> <td><input type="checkbox"/> Recruitment Request Form</td> <td>Marianne Papa</td> <td>4/11/2019   11:34:07 am</td> </tr> <tr> <td><input type="checkbox"/> External Advertisement Approval Form</td> <td>Marianne Papa</td> <td>4/11/2019   09:16:07 am</td> </tr> <tr> <td><input type="checkbox"/> FFSP Request Form</td> <td>Archie Lin</td> <td>4/10/2019   12:47:40 pm</td> </tr> </tbody> </table>	Name	Owner	Last Change	<input type="checkbox"/> Charterfield Value Request Form	Jesse Shan	4/18/2019   04:03:57 pm	<input type="checkbox"/> Recruitment Request Form (ASF only)	Marianne Papa	4/18/2019   11:04:01 am	<input type="checkbox"/> Trust Fund Agreement	Sally Lei	4/17/2019   01:37:55 pm	<input type="checkbox"/> Alcohol Clearance Form	Michael Beatty	4/17/2019   01:13:53 pm	<input type="checkbox"/> Invoice Approval Form - CRSP (Instate by Department)	Cheryl Leung	4/17/2019   10:01:23 am	<input type="checkbox"/> Invoice Approval Form - Non CRSP (Instate by Department)	Cheryl Leung	4/17/2019   10:01:01 am	<input checked="" type="checkbox"/> Performance Evaluation Form (Management Personnel Plan)	Cheryl Leung	4/16/2019   04:23:24 pm	<input type="checkbox"/> Work Schedule (March 2019)	Agnes Cheng	4/12/2019   04:42:21 pm	<input type="checkbox"/> Recommendation to Hire	Marianne Papa	4/12/2019   11:04:11 am	<input type="checkbox"/> Recruitment Request Form	Marianne Papa	4/11/2019   11:34:07 am	<input type="checkbox"/> External Advertisement Approval Form	Marianne Papa	4/11/2019   09:16:07 am	<input type="checkbox"/> FFSP Request Form	Archie Lin	4/10/2019   12:47:40 pm
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Steps	Examples
<p>6. Assign routing information:</p> <ol style="list-style-type: none"> <li>Evaluator</li> <li>Employee (MPP)</li> <li>Evaluator</li> <li>Dean or Director (If Applicable)</li> <li>Associate Vice President (If Applicable)</li> <li>Cabinet Officer (If Applicable)</li> </ol> <p><b>** In the event that any recipient needs to be added or deleted, make sure to click on "Set Signing Order" to correctly re-number the recipient order.</b></p> <p>When complete, click <b>SEND</b> at the bottom left corner of the page.</p>	
<p>7. Once you get to this page, click <b>SIGN NOW</b>.</p>	
<p>8. Click <b>CONTINUE</b> and then <b>START</b> to fill the required fields.</p>	

Steps	Examples
<p>9. Use the <b>FILL IN</b> and <b>NEXT</b> button as a guide to fill the required fields.</p>	 <p>The screenshot shows a 'FILL IN' button circled in red. To its right, the form title is 'San Francisco State University Management Personnel Plan / MPP Performance Review'. Below the title are input fields for 'Name', 'School/Department', 'Evaluation Period', and 'Position', each with a red box around it.</p>
<p>10. Because of the character limit to the Comments box, you have the option to attach additional documents by clicking this image:</p> 	 <p>The screenshot shows a 'NEXT' button on the left. In the 'Comments' section, there is an attachment icon (a yellow square with a red arrow pointing down) circled in red. To the right, there are input fields for 'Name', 'School/Department', 'Evaluation Period', and 'Position'.</p>
<p>11. Once you've completed the form, click <b>FINISH</b>.</p>	 <p>The screenshot shows a 'FINISH' button circled in red at the bottom center of the form.</p>
<p>12. When the transaction is completed (i.e. all appropriate administrators sign this document), you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by clicking <b>VIEW COMPLETED DOCUMENT</b>.</p>	 <p>The screenshot shows a DocuSign completion screen. At the top, there are two PDF attachments: 'MPP - Performance Eval...' (466 KB) and 'Summary.pdf' (185 KB). Below them is a link to 'Show all 2 attachments (651 KB) Download all'. The main content area has a yellow background with a document icon and the text 'Your document has been completed.' At the bottom, there is a red-bordered button labeled 'VIEW COMPLETED DOCUMENT'.</p>