

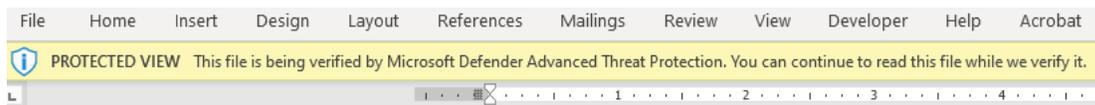
Overview

The performance review is a crucial part of the ongoing dialogue between managers and employees. It summarizes ongoing performance and development conversations and provides a record of past performance and expectations for work moving forward. The draft (*writing and iterative component*) of the performance review **must** take place outside of DocuSign.

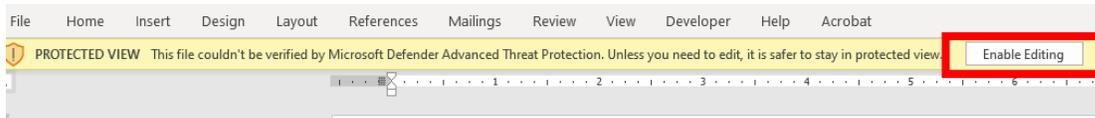
Instructions for the Preparer/Evaluator to start a DRAFT ONLY form outside of DocuSign

The Preparer/Evaluator can use [Fillable Draft Only forms](#) to draft the evaluation **OUTSIDE OF DOCUSIGN**.

1. Download the appropriate form / Word document from the Box folder ([link here](#)).
2. Wait until the document is verified (see image below).



Then click “Enable Editing” to be able to fill in the DRAFT ONLY Performance Evaluation Form (see image below).



Note: You can use the use the “Word Count” tool located on the bottom of the document to make sure you stay within the character limits. For further instructions regarding character limits, please visit the Performance Evaluations FAQs found on to the [Performance Management Process Website](#).

3. Use this form to draft the Performance Evaluation in preparation for the performance review conversation.
4. Following the performance review conversation, the Evaluator and/or Preparer will use the correct PowerForm link, found on the [Performance Management Process Website](#), to copy and paste the information, collect signatures, and submit to the next recipient.

Instructions for the Preparer/Evaluator to Start a Performance Evaluation PowerForm

1. Open the DRAFT ONLY performance evaluation document in your device.
2. Go to the [Performance Management Process Website](#) and select the correct PowerForm.

Note: Make sure to select a Probationary PowerForm for Probationary employees. Refer to specific CBA for probationary timelines. You can find the CBA on the FAQs on the [Performance Management Process Website](#).

PERFORMANCE EVALUATION INSTRUCTIONS

Annual Performance Evaluation Forms

[CSUEU Annual Performance Evaluation](#)
[Unit 4 Annual Performance Evaluation](#)
[Unit 6 Annual Performance Evaluation](#)
[Unit 8 \(SUPA\) Annual Performance Evaluation](#)
[MPP Annual Performance Evaluation](#)

Probationary Performance Evaluation Forms

[CSUEU Probationary Performance Evaluation](#)
[Unit 4 Probationary Performance Evaluation](#)
[Unit 6 Probationary Performance Evaluation](#)
[Unit 8 \(SUPA\) Probationary Performance Evaluation](#)

3. On the PowerForm main page, enter the full name and email for each recipient.

Note:

- The Preparer assists with entering the evaluation responses to the PowerForm. The Preparer and Evaluator can be the same person. However, the Preparer and the Employee **CANNOT** be the same person. If the Preparer is unsure of who needs to fill the recipient roles, the Preparer needs to check the business practices of their department regarding the review and signature of Performance Evaluations.
- **We recommend the Preparer have a list of names and emails of the recipients handy.** If the incorrect name or email is entered, you will **not** be able to correct the name or email and will **have to resubmit** a new PowerForm. For reference, here is a list of the required roles of the recipients for each type of Performance Evaluation Form.

CSUEU, Unit 4, Unit 6 (Probationary and Annual forms)	Unit 8 (Probationary and Annual forms)	MPP and C99
1. Preparer	1. Preparer	1. Preparer
2. Employee	2. Sergeant 1 (Optional)	2. Employee
3. Evaluator (Immediate Administrator)	3. Sergeant 2 (Optional)	3. Evaluator
4. Appropriate Administrator	4. Division Commander	4. Dean or Director (Optional)
	5. Assistant VP and Chief of Police	5. Associate Vice President (Optional)
	6. Employee	6. Cabinet Officer (Optional)

4. Once you are certain of the names and emails on the PowerForm Main Page, Click on **BEGIN SIGNING** at the bottom of the page to proceed.

Note: If you click on BEGIN SIGNING or FINISH LATER, there will be no way to go back to the PowerForm Main Page and edit the recipient list if you made a mistake.

5. The Preparer will copy and paste the form field content from the draft document to the DocuSign performance evaluation form.
6. Double check the accuracy of the form before selecting **FINISH**. Once it is submitted, the only way to make changes would be to void the form and start a new one.
7. Once the Preparer has entered the required fields, they will select **FINISH** either at the end of the performance evaluation form or at the top navigation pane. DocuSign will then route the performance evaluation form to the next recipient(s) for their acknowledgement and signatures.

PERFORMANCE EVALUATION INSTRUCTIONS

Instructions for the following recipients to Review and Sign/Acknowledge the Performance Evaluation PowerForm

1. Open the DocuSign notification email regarding the Performance Evaluation PowerForm.
Note: We recommend that you save this email for easy access.
2. Select **REVIEW DOCUMENT**. DocuSign will prompt you to enter your SF State credential and two-factor authentication to access the document.
3. *(Optional)* If this is your first-time logging in to DocuSign, check the box next to “I agree to use electronic records and signatures” and click **CONTINUE** to begin the process.
4. Review the document by scrolling or using the page thumbnails in the right-hand navigation pane.
5. Complete the required fields and enter your acknowledgement.
6. Double check the accuracy of the form before selecting **FINISH**. Once it is submitted, the only way to make changes would be to void the form and start a new one.
7. When you are done, select **FINISH**. You will be able to access and track the status of the performance evaluation document in DocuSign. For more information, please refer to the [track a document how-to guide](#).
8. DocuSign will send a notification email to all recipients when the performance evaluation form is complete. You may access and download the completed document by clicking **REVIEW DOCUMENT** to open the document in your browser or accessing it directly in your DocuSign account. For further instructions regarding downloading a completed copy, please visit the Performance Evaluations FAQs found on to the [Performance Management Process Website](#).

For evaluation-related questions, please submit a service request at [HR Client Services Center](#). For DocuSign assistance, please submit a [DocuSign service request](#).