

# Performance Evaluations FAQs

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## Performance Evaluations Process Questions:

1. What are the Performance Evaluation timelines for the CSUEU, APC and Teamsters?

<b>CBA</b>	<b>Criteria</b>
<i>CSUEU (units 2,5,7,9)</i>	Once employees receive the draft, they have ten (10) work days to review and provide input, if any, to the Appropriate Administrator (MPP).
<i>APC (unit 4):</i>	Once employees receive the draft, they have fourteen (14) days to review and provide input, if any, to the Appropriate Administrator (MPP).
<i>Teamsters (unit 6)</i>	Once employees receive the draft, they have five (5) work days to review and provide input, if any, to the Appropriate Administrator (MPP).

2. Where can I find the Collective Bargaining Agreement (CBA) Performance Evaluation Article for my unit?

<i>Unit</i>	<i>CBA</i>	<i>Performance Evaluation Article</i>
2,5,7,9	<a href="#">California State University Employee Union (CSUEU)</a>	10
4	<a href="#">Academic Professionals of California (APC)</a>	18
6	<a href="#">Teamsters</a>	12

3. I hired an employee that worked in another department during the fiscal year review period, do I complete an Annual review? Does the previous supervisor and I do a joint review?

**NO.** Since the employee is in a new position, the employee has a new Probationary period to complete. The previous supervisor will complete an Annual Performance Evaluation for the months the employee worked for the previous supervisor and you will complete a Probationary Performance Evaluation, if applicable.

**Example:** For the Fiscal year of 7/1/22 – 6/30/23, Richard was a Permanent Employee from 7/1/22 until 10/31/22 in Administration and Finance. Richard then started a new position in a different Cabinet, Student Affairs, as a Probationary Employee on 11/1/22.

**Performance Evaluations need to be submitted for Richard for the 7/1/22 – 6/30/23 Fiscal Year.**

- An Annual Review should be submitted for Richard’s time in the Administration and Finance Cabinet by his Appropriate Administrator from the Administration and Finance Cabinet.
- A Probationary Review should be submitted for Richard according to the review sequence for his Bargaining Unit by his Appropriate Administrator at the Student Affairs Cabinet. (For CSUEU, Richard would have a Probationary Review at the 3<sup>rd</sup>, 6<sup>th</sup>, and 11<sup>th</sup> months of his Probationary Period).

**4. How often are Performance Evaluations for Probationary Employees submitted?**

Below are the review sequences for each type of Probationary Employee.

<b>CBA</b>	<b>Review Sequence</b>
<i>CSUEU Unit 2,7,5,9</i>	by the end of the third (3rd), sixth (6th), and eleventh (11th) month of the Probationary period
<i>APC Unit 4</i>	at the end of the Probationary period
<i>SUPA Unit 8</i>	by the end of the sixth (6th), ninth (9th), and twelfth (12th) month of the Probationary period
<i>Teamsters Unit 6</i>	within two (2) weeks of having completed the sixth (6 <sup>th</sup> ) and eleventh (11 <sup>th</sup> ) month.

**Please Note:** You may only grant or recommend Permanent Status at the last Probationary Employee Review.

### DocuSign Questions:

**5. Does DocuSign send reminders to employees? What happens if employees don't sign it?**

A 3-day reminder is scheduled for all DocuSign Performance Evaluation forms. If employees don't sign, the Performance Evaluation will stay in the employees' DocuSign queue. Employees will continue to receive reminders until the Performance Evaluation expires. Also, employees will get a notification about expiration 7 days prior to the expiration date.

Expired is considered a terminal status. If the Performance Evaluation expires, the Preparer would need to resubmit the Performance Evaluation using the established PowerForm. The Performance Evaluation expires after a 120 days.

**6. If I click the “Sign” button  from the “Action Required” section of DocuSign , does that mean I am agreeing to the Performance Evaluation form content?**

Clicking the “Sign” button (  ) does not equal signing and agreeing to your performance evaluation.

Clicking the “Sign” button (  ) only allows you to fill out your role within the document and helps move the document forward to the next recipient.

For CSUEU, Unit 6, and Unit 4 Performance Evaluation PowerForms, the employee signature within the PowerForm is optional. For Unit 8, MPP, and C99 PowerForms, the employee signature is required but those forms state that the signature does not indicate agreement with the rating. *(That text was added to the MPP and C99 forms in 2023).*

**7. If there is a mistake at some point within the process, can the document be voided?**

With the use of the PowerForm, individuals who prepare the evaluations cannot void the pending evaluation. The person that the PowerForm Evaluation document lies with at that moment will need to decline to sign and ask the Preparer to resubmit the form. Only completed evaluations get saved and stored in the employee personnel file.

8. DocuSign strips the formatting from the text I paste in, so section-headers, bullet-points, etc., aren't as clear to the reader. Is there a way to remedy this?

**NO.** Unfortunately, there is no way to remedy and maintain the original format. We would suggest that users add line spacing to separate each section.

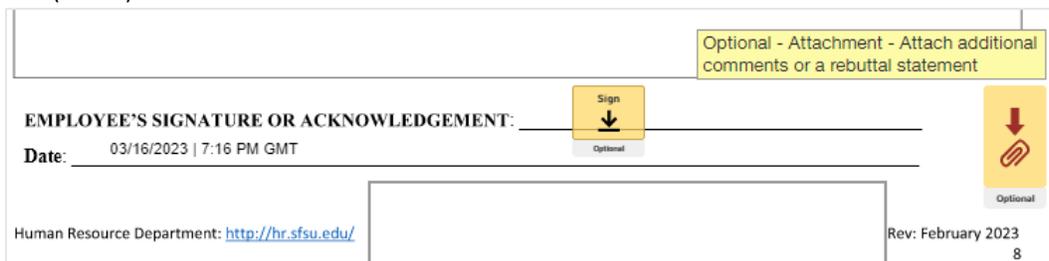
9. Is the employee signature optional on the Performance Evaluation PowerForm?

For the CSUEU, Unit 6, and Unit 4 Performance Evaluation PowerForms, the employee signature within the PowerForm is optional. For the Unit 8, MPP, and C99 PowerForms, the employee signature is required but those forms state that the signature does not indicate agreement with the rating. *(That text was added to the MPP and C99 forms in 2023).*

10. Where can the employee submit a rebuttal within the Performance Evaluation PowerForm?

If you are submitting a rebuttal, you may submit your rebuttal within DocuSign. The attachment button is located in the employee section of the Performance Evaluation by the employee's signature.

APC (Unit 4)



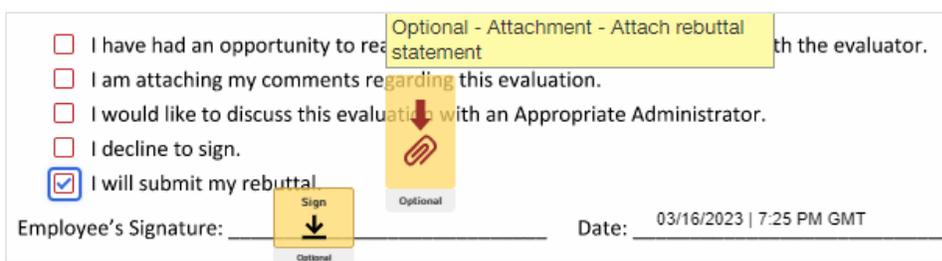
Optional - Attachment - Attach additional comments or a rebuttal statement

EMPLOYEE'S SIGNATURE OR ACKNOWLEDGEMENT:  \_\_\_\_\_

Date: 03/16/2023 | 7:16 PM GMT  \_\_\_\_\_

Human Resource Department: <http://hr.sfsu.edu/> Rev: February 2023  
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CSUEU (unit 2,5,7,9) and Teamsters (Unit 6)



Optional - Attachment - Attach rebuttal statement

- I have had an opportunity to re-discuss this evaluation with the evaluator.
- I am attaching my comments regarding this evaluation.
- I would like to discuss this evaluation with an Appropriate Administrator.
- I decline to sign.
- I will submit my rebuttal statement.

Employee's Signature:  \_\_\_\_\_ Date: 03/16/2023 | 7:25 PM GMT  \_\_\_\_\_

SUPA (Unit 8)



Optional - Attachment - Attach rebuttal - the employee may submit a rebuttal statement within a maximum of thirty (30) days of receipt of the evaluation.

**This report has been discussed with me with the rating.**

Employee's Signature:  \_\_\_\_\_

 Department Head Review

11. Can supervisors go into DocuSign and locate the status of the Performance Evaluations? Does the supervisor receive email reminders about Performance Evaluations that are not complete?

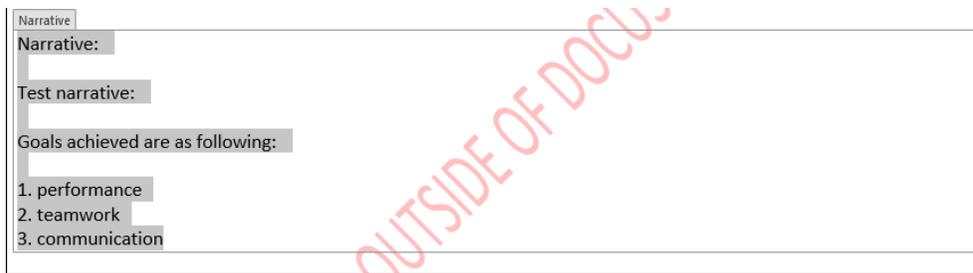
In DocuSign, users may only track documents that they have already "touched" (e.g., viewed, enter information, signed). If the supervisor is not the preparer who initiated the evaluation, the supervisor will only be able to locate/track the evaluation after they had signed it. For more information, please refer to the [track a document how-to guide](#).

Regarding the reminders, DocuSign only sends reminder emails to one recipient at a time who is next to take an action. For example, after the Preparer initiates an evaluation, DocuSign will send an email notification and subsequent reminders to the employee until they complete their assigned task.

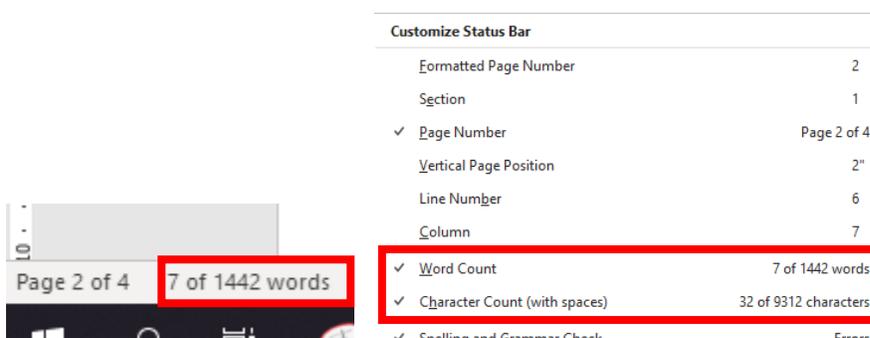
12. Is there a limit of the amount of words I can write per text box on the PowerForm Performance Evaluation?

Yes, the number of maximum characters (with spaces) that DocuSign allows **per** text box is 4,000. Please note that this year more space / text boxes were added to the Performance Evaluations PowerForms. When preparing your draft, you may use the "Word Count" tool located on the bottom of the word document.

- On your draft document, select all the text that you wish to count



- Left click on the word count at the bottom of your word window and check "Character Count (with spaces)" to see the character count on the bottom of your word document.



- After checking that option, when you select the text you want to count, you will see the character count displayed as # out # characters. The first number, or #, is the count of number of characters within that textbox. See screenshot below (The number of characters for the highlighted section in the screenshot is 101).

**PLEASE NOTE:** The DocuSign C99 Anr characters (with spaces) per text box the “Word Count” tool located in the

Narrative: \_\_\_\_\_  
 Narrative: \_\_\_\_\_  
 Test narrative: \_\_\_\_\_  
 Goals achieved are as following: \_\_\_\_\_  
 1. performance \_\_\_\_\_  
 2. teamwork \_\_\_\_\_  
 3. communication \_\_\_\_\_

**SUMMARY EVALUATION**

have evaluated the merit and perform

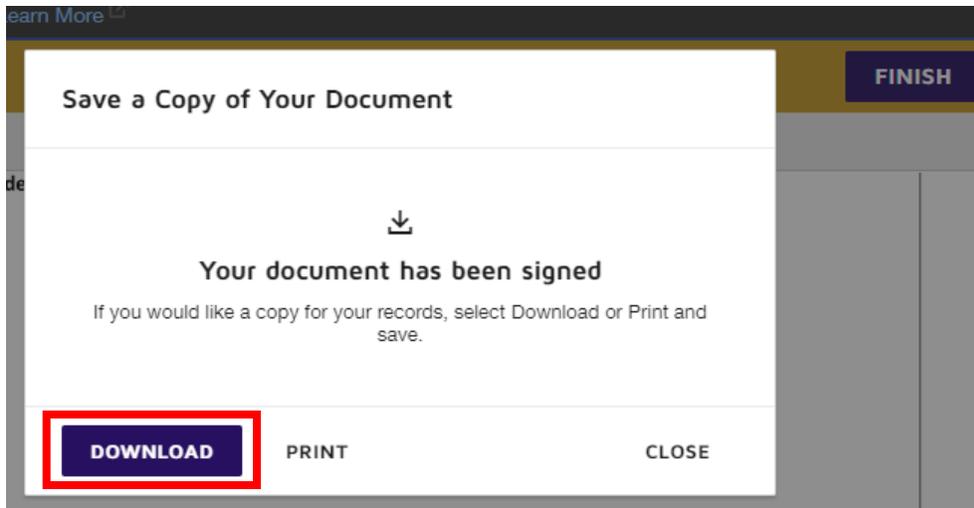
- Less than Satisfactory (Margini
- Satisfactory (Achieves expecte
- More than Satisfactory (Frequi

Evaluator’s Signature: Click or tap he  
 15 words 101 of 3410 characters

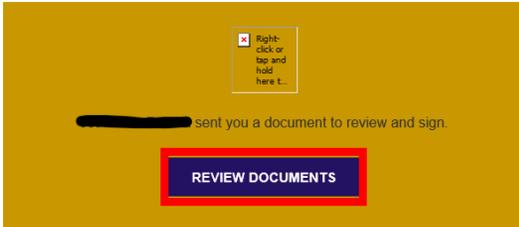
**NOTE:** The fillable DRAFT ONLY Performance Evaluation word documents have more instructions regarding character limits. You can find the fillable DRAFT ONLY forms on the Performance Evaluation Instructions PDF on the [Performance Management Process HR website](#).

**13. How can I receive a copy of the Performance Evaluation?**

After you complete your role within the PowerForm, and you click “Finish”, a pop-up window asks if you would like to “Save a Copy of Your Document”. Click the “Download” button to receive a copy of the Performance Evaluation.



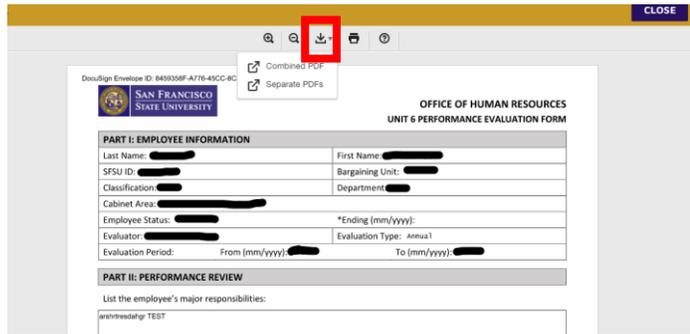
Alternatively, you can return to the link that was sent to you in Outlook to first complete your portion of the Performance Evaluation. You will be able to see and download a copy by clicking “Review Documents” and clicking the download icon.



Greetings,

Please complete, review, and sign the Unit 6 Annual Performance Evaluation for evaluation cycle July 1, 2021 to June 30, 2022. For questions, please submit a service request at HR Client Services Center (<https://sfsu.service-now.com/hrq>).

Warm Regards



14. Can I add additional forms/pages/text boxes to the PowerForm in DocuSign? Can I upload additional documents?

**NO. The PowerForm cannot be modified. NO. There is no upload option.** Please note that this year more space / text boxes were added to the Performance Evaluations PowerForms.

**Preparer Questions:**

15. Where can I find the Fillable DRAFT ONLY forms? Where can I find all Performance Evaluation PowerForms?

You can find the fillable DRAFT ONLY forms on the Performance Evaluation Instructions PDF on the [Performance Management Process HR website](#). Please fully read and follow the instructions before starting the PowerForms. You can find all PowerForms on the [Performance Management Process HR website](#). Please make sure to select from the Annual Performance Evaluation PowerForms for Annual Employees and from the Probationary Performance Evaluation PowerForms for Probationary Employees.

<p><b>Annual Performance Evaluation Forms</b></p> <ul style="list-style-type: none"> <li><a href="#">CSUEU Annual Performance Evaluation</a></li> <li><a href="#">Unit 4 Annual Performance Evaluation</a></li> <li><a href="#">Unit 6 Annual Performance Evaluation</a></li> <li><a href="#">Unit 8 (SUPA) Annual Performance Evaluation</a></li> <li><a href="#">MPP Annual Performance Evaluation</a></li> </ul>	<p><b>Probationary Performance Evaluation Forms</b></p> <ul style="list-style-type: none"> <li><a href="#">CSUEU Probationary Performance Evaluation</a></li> <li><a href="#">Unit 4 Probationary Performance Evaluation</a></li> <li><a href="#">Unit 6 Probationary Performance Evaluation</a></li> <li><a href="#">Unit 8 (SUPA) Probationary Performance Evaluation</a></li> </ul>
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16. When the Preparer types in the names, the emails do not populate automatically. Can the PowerForm be adjusted for the emails to populate automatically?

**NO.** DocuSign doesn't allow us to make such adjustment/customization. We recommend that the Preparer have the list of names and emails of the recipients handy. For reference, here is a list of the required roles of the recipients for each type of Performance Evaluation Form. Please refer to the Full Instructions PDF for more information.

<b>CSUEU, Unit 4, and Unit 6 (Probationary and Annual forms)</b>	<b>Unit 8 (SUPA) (Probationary and Annual forms)</b>	<b>MPP and C99</b>
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)

17. If the Preparer only knows the name and email of the employee, and does not know who should fill the rest of the recipient roles within the Performance Evaluation, what should the Preparer do?

For all Performance Evaluations, the Preparer and the Employee **CANNOT** be the same person. If the Preparer is unsure of who needs to fill the remaining recipient roles, the Preparer needs to check what the business practices are of their department regarding the review and signature of Performance Evaluations.

Note: Technically, the Preparer is allowed to be both the Evaluator and the Appropriate Administrator. Please check the Performance Evaluation process within your department to verify the recipient roles.

18. I clicked on "Finish Later" on the PowerForm and received an email to access the form later. Once I clicked the email, it went back to the Performance Evaluation form and not to the PowerForm Main Page, which shows the recipients' list. Is there a way to go back to the PowerForm Main Page and edit the recipient list if I made a mistake?

**NO.** "Finish Later" feature only allows the Preparer to return to the Performance Evaluation form. It will not allow the Preparer to modify/correct the recipient contact information on the PowerForm Main Page. If the Preparer makes a mistake to the recipient list, the Preparer will need to resubmit a new PowerForm.

19. Who is the Cabinet Officer?

The Cabinet Officer is the Vice President of each of the Cabinet areas.

## Probationary Performance Evaluations Questions:

20. Do I submit an Annual PowerForm Performance Evaluation for Probationary Employees?

**NO.** Make sure to complete a Probationary Performance Evaluation PowerForm for Probationary Employees. Please make sure to select the correct form.

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](#)

21. I meant to check “Reject during Probation” but did not get that option to check. Why?

If there is no option to check, that implies that the Preparer used the Annual Performance Evaluation PowerForm rather than the Probationary Performance Evaluation PowerForm. The Preparer needs to fill out a Probationary Form for Probationary Employees in order to see the options to check. You can find all forms at on the [Performance Management Process HR website](#).

**Please Note:** You may only grant or recommend Permanent Status at the last Probationary Employee Review.

22. Within the Probationary Performance Evaluation PowerForm, I wanted to check “Grant Permanent Status” or “Reject during Probation” but did not get the option to check either. Why?

You may not be in the correct recipient role to grant permanent status.

To grant permanent status you must use a Probationary Performance Evaluation PowerForm. If the correct form is filled out, the option of selecting “Grant Permanent status” in the CSUEU & Unit 6 Probationary Performance Evaluation PowerForms is given to the “Appropriate Administrator” role. The “Evaluator” (Immediate Administrator) role does not have that option when filling out the Performance Evaluation.

For Unit 4 Performance Evaluation PowerForms, the checkbox to indicate a recommendation of permanent status is assigned to the “Evaluator” (Immediate Administrator) role.

**Please Note:** You may only grant or recommend Permanent Status at the last Probationary Employee Review.