

## New Classified Employee Evaluation Form and Adobe Sign Process Explained

Managers, please immediately establish your employee's evaluation timeline, in compliance with the CSEA requirements, and schedule your employee Evaluation Conference. The CSEA performance evaluation requirements are outlined in the [Amended CSEA Article 4, Evaluations MOU dated May 2024](#).

Below is a step-by-step guide to help you navigate the new Classified Employee Evaluation process via Adobe Sign.

### Step 1 - Manager

Manager launches the Evaluation form in Adobe Sign. Fill out the names of the signatories (your name and your employee's name) and then fill in your employee's information: name, classification, department, dates for evaluation (eg. February 1, 2024-February 1, 2025). Click "**Submit**."

### Step 2 - Employee

Employee receives an email from Adobe titled "Information Requested." Click on the link in the email which will prompt you to sign into Adobe Sign. Fill out the self-evaluation form and include additional attachments, if so desired. Once complete, click "submit." If unable to complete the self-evaluation in one sitting, close out of Adobe Sign (**do NOT click "Submit"**), so that you can log in at another time to continue working on the form. You will find the form when you log back in, in the "Waiting for You" folder in your Adobe Sign account. Once you click "**Submit**" the form is sent to your Manager to complete the Employee Evaluation portion. Remember, once you click "**Submit**", you will not be able to log back in and complete your self-evaluation. Once you submit your form, you have the option of downloading a copy for your files.

### Step 3 – Manager

The Manager receives an email from Adobe Sign. Please review your employee's self-evaluation and then fill out your evaluation of your employee. If unable to complete the evaluation in one sitting, close out of Adobe Sign (**do NOT sign the form and click "Submit"**), so that you can log into your account at another time to continue working on your employee's evaluation. The incomplete Employee Evaluation form will be in your "Waiting for You" folder in your Adobe Sign account. Once you complete the employee evaluation, sign your name and then click "**Submit**." Once you click "**Submit**" you cannot make any more changes. The form now goes automatically to the employee so that the employee can review your evaluation of them.

#### Step 4 – Manager & Employee – Evaluation Conference & Approval

Manager and Employee meet for the Evaluation Conference. During or after the Evaluation Conference, the Manager may click on “**Approve**” at which time the form is sent to the employee for their approval. Alternatively, the Manager may decide to make some changes to the evaluation form by clicking on the square next to the appropriate textbox. Once all edits are complete, the Manager will click “**Approve.**” Once Manager approves, the form is sent to the employee for their signature and approval.

#### Step 5 - Employee

Employee receives an email from Adobe titled “Acceptance Requested.” Once you access the form, you will have the following options:

- a) Employee signs and clicks “**Accept**”
- b) Employee can attach additional documents and fill out Part III of the form, as a comment/response to the Manager’s evaluation, then sign and “**Accept**”
- c) Employee can click on the square box next to their name, in case they do not wish to sign the Evaluation form, they will be prompted to type their name at the bottom of the page “**I \_\_\_\_\_ (employee name) refuse to sign this performance evaluation**” and then “**Accept;**” or
- d) In case Employee does not respond to this final step, the Manager may assign themselves as the “alternate recipient” in Adobe Sign and go back into the Evaluation form to check the box to the right of the Employee’s signature, and “**Accept**” the document. The Manager must complete this step before the end of the 60-day period.