

2024 Annual Performance Review Instructions for Supervisors and Employees



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Completing the annual employee evaluation (Supervisor)

CCRI is conducting the Annual Employee Performance Review Process using DocuSign.

On March 18, 2024, supervisors of all full-time employees will receive individual emails for each employee with a link to access their evaluation form in DocuSign. Deadlines must be adhered to:

- Evaluations of PSA union members must be completed by supervisors and employees, and received by HR, no later than Wednesday, July 31, 2024.
- Evaluations of ESPA union members and Board of Education (BOE) employees must be completed by supervisors and employees, and received by HR, no later than Friday, August 30, 2024.

Supervisors are expected to plan accordingly and monitor status. Supervisors are able to complete the evaluation form individually via their email inbox, as they desire.



However, you may wish to access a Dashboard within DocuSign that will allow you to organize and manage your work, set priorities, etc...To access your DocuSign dashboard head to MyCCRI.

Click on the "For Employees tab.

Click on "DocuSign."



Employee Dashboard	13 T × Work Order		CO T × Institutional Effectiveness Resources	13 * ×
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CCRI employees can access college policies as needed in PolicyStat.				
To locate relevant policies, try searching by:	Constant Sector			
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You will be taken to DocuSign's dashboard and be able to access items under the following categories"

- I. Action Required Items awaiting your review and signature
- 2. Waiting for Others Items you either sent, or completed that are now awaiting action from another party within a review queue.
- 3. Expiring Soon Items that will expire after a predetermined timeframe.
- 4. Completed Items that you either sent or completed that have also completed their steps within a review queue.

Click on "Action Required," you will be taken to the items awaiting your review and signature.

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Once inside, you can decide how to organize your work. Its highly recommended that you schedule time on your calendar for you to meet with your employee's and to perform the evaluation with them. This will help set you up for success.

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Completed Authentication Failed FOLDERS +				

When you're ready to fill out an evaluation form, click "Sign" on the right side of the corresponding employee. Please note that you cannot move to complete an evaluation form until you have checked the box for "I agree to use electronic records and signatures" and click "Continue" once it is highlighted.



Upon entry, you'll see the name of the employee you're evaluating pre-loaded into the document. To successfully submit a performance evaluation, you must enter their Banner ID accurately. Supervisors may find the Banner IDs of their direct reports by clicking on "My Team," in the employee dashboard. Each employee's banner ID appears beneath their name. You may copy and paste it into the Employee Banner ID field in the evaluation. To make this easier, a link is included in the evaluation, that will take you to the Employee Dashboard.



Employee Dashboar			
Employee Da	shb <mark>r</mark> ployee Dashboard • My Team		
Knight, Drew	My Team	4	
My Profile	Search on ID or Name	Sick in hours	493.75 Vacation
	Flanagan, Charles		Ful
Pay Information	96725229		🎽 🖉 My A
Latest Pay Stub: 02/16/20	024 193455		
Earnings			^

Note: The Annual Review button is already selected, there is no need to adjust this.

Employees should be rated appropriately in each of the categories and relevant comments added. If an employee is rated a 3 in any category, supervisors are encouraged to provide relevant positive feedback. Some form of comment is required in every field.

In the event you need to stop writing the evaluation and return to it later, you can save your work without losing progress.

To do so, in the upper right corner, click "Other Actions" and select "Finish Later."

You will be prompted to begin another document if there are additional items to review in your queue. You may opt to do so by clicking "Sign" or you may choose not to by clicking "No Thanks" and you'll be taken back to the queue of items requiring your action.

You can return and pick up where you left off at a later time.



Q Q ±.		Finish Later
		Print & Sign
locuSign Envelope ID: A1F41745-AA58-47FB-B12F-226FF1AA9C34	DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE 999 3rd Ave, Suite 1700 + Seattle + Washington 98104 • (206) 219-02 wawdoouto.com	Assign to Someone Else Void
PERFORMANCE REVIEW FORM Employee Name: Charles Flanagan Employee Banner ID: 95725229	3 = Consistently Achieves Standards 2 = Usually Achieves Standards I = Does Not Usually Achieve Standards N/A = Not Applicable	Help & Support 亿 About DocuSign 년
Head to the Employee Dashboard D ³ Probationary Review Annual Review Follow-up Review	For instructions <u>visit cori.edu/hr/performance</u> [2 ^{7]} Please remember that a rating of 3 means you believe the employee consistently achieves standards and the employee is fully competent in the factor being rated. Please comment on all factors rated 1 or 2	View History View Certificate (PDF) ^[27] View Electronic Record and Signature Disclosure Session Information
ATTENDANCE / PUNCTUALITY Consider whether the employee arrives and departs at scheduled times, is punctual for meetings/appointments, observes prescribed break/meal periods, and has an acceptable overall attendance record. JOB KNOWLEDGE Consider whether the employee fully understands their duties and responsibilities; works effectively without supervision and accepts responsibility, effectively utilizes job- related information and job-related equipment; is proficient	Rating Supporting Comments: 3 N/A Rating	Report Abuse

Any employee who receives an overall rating of 2 or less, should have the opportunity to an interim follow-up review and it should be scheduled at the time of the evaluation.

Once you have completed the written evaluation, you must sign and enter your Banner ID accurately. You may find your Banner ID on the employee Dashboard by clicking on "My Profile" where it appears below your name on the left side.

Employee Dashbo	ard Employee Profile
Knight, Drew	Personal Information Addresses

Upon clicking "Finish" your employee will receive their evaluation to review, make comments if desired, and sign. You will be prompted to begin another document if there are additional items to review in your queue. You may opt to do so by clicking "Sign" or you may choose not to by clicking "No Thanks" and you'll be taken back to the queue of items requiring your action.



In the DocuSign Dashboard, supervisors can click on "Waiting for Others" to see which employee's have yet to complete their evaluations.

DocuSign eSignature	Home	Manage	Templates	Forms	Reports	Settings	Q	0	
Welcome back	Las C Ac	t 6 Months	1 Waiting	for Others	O Expiring	Soon	3 Completed		
	Drop	documents	to get started Start	l or click th	e 'Start' but	:ton.			
Recent Activity 🛈							Go to M	lanage	>

Once inside, clicking on the "Waiting for Others" link will open a box indicating whose review and signature is required to complete the evaluation. Supervisors are asked to assist in timely completion by reminding their employees to complete the evaluation according to required timing.

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SHARED ACCESS V	Waiting for Ot	thers		Wai	ting for	Q Search Quick Vie	ws	
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Drafts								



Completing the annual employee evaluation (Employee)

After supervisors sign and finish their employees' evalutaions, they will immediately route to the employee who will receive an email. Deadlines must be adhered to:

- Evaluations of PSA union members must be completed by supervisors and employees, and received by HR, no later than Wednesday, July 31, 2024.
- Evaluations of ESPA union members and Board of Education (BOE) employees must be completed by supervisors and employees, and received by HR, no later than Friday, August 30, 2024.

Employees are able to complete their evaluation form via their email inbox, as desired.



However, you may wish to access a Dashboard within DocuSign that will allow you to organize and manage your work. To access your DocuSign dashboard head to MyCCRI.

Click on the "For Employees" tab.

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Employee Deshboard	COF X West Dreer	∷*× ities Work Order iest	Healthaireal Effectiveness Resources	D*×
CCRI has builded Employee Self Service to make key personnel information readily evaluable CCRI Employees can now find HR and Payroli information in one simple place. Use the employee dashbard for: • submitting time and leave requering • version and leave requering	CCRI employees can submit a Facilities Wor - equipment to a splanter repair - receivacial issues such as HVAG and lighting - cubicital grounds weiging and other general Work Order Request	rk Order Request for assistance with:	grand and an advantage of a set of a dial dial of a dial dial of a dial dial of a dial of a dial of a dial	
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CGRI employees can access college policies as needed in PolicyStat. To locate relevant policies, try searching by:				
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You will be taken to DocuSign's dashboard and be able to access items under the following categories"

I. Action Required – Items awaiting your review and signature



- 2. Waiting for Others Items you either sent, or completed that are now awaiting action from another party within a review queue.
- 3. Expiring Soon Items that will expire after a predetermined timeframe.
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Click on "Action Required," you will be taken to the items awaiting your review and signature including your performance evaluation (if completed by your supervisor).

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When you're ready to review and sign your evaluation form, click "Sign" on the right side of the corresponding document.

SHARED ACCESS T	Action Required	Q Sear	ch Quick Views
NEW V	Date (Last 6 Months) Edit		
ENVELOPES	Subject	Status	Last Change 🔻 Folder
Inbox ✓ Sent	2024 Employee Performance Evaluation Charles Flanagan To: Drew Knight, Charles Flanagan +2 more	 0/4 done Need to Sign 	2/29/2024 SIGN ¥
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Please note that you cannot move to complete an evaluation form until you have checked the box for "I agree to use electronic records and signatures" and click "Continue" once it is highlighted.



Review the feedback provided by your supervisor and consider your own reflection of your work over the past year. Comments may be added and you must sign and click "Finish" to complete your evaluation.

Thanks for the feedback!		
I have read this review and have discussed it with my s with this review. I understand that I should keep a cop —DocuSigned by:	upervisor. My signature does not necessarily signify that I ag y of this Performance Review Form for my files.	gree or disagree
Charles Flanagan		
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