

DocuSign Instructions for GTHR Performance Appraisal Record

This appraisal should be completed by the employee's supervisor. **Please read these instructions in their entirety before proceeding to DocuSign to complete the form.** For your convenience, keep the following instructions visible as you complete the form. Before you begin, you will need the employee's name, job title and PeopleSoft ID# to complete the form.

Accessing DocuSign

When you are ready to start, login to DocuSign using one of the two options below.

Option 1:

Click the link below to access the form. It will direct you to DocuSign to login.

Performance Appraisal Record - Template Link

<https://app.docusign.com/templates/details/cf036be5-3be3-489c-8c72-83f20e81bcb4>

Option 2:

Access the shared Performance Appraisal Record from within DocuSign.

- (1) Go to the Georgia Tech eSignature site: [esignature.gatech.edu](https://signature.gatech.edu)
- (2) Login to DocuSign using your Georgia Tech credentials
- (3) Navigate to the Performance Appraisal Form under the Templates section:
Templates/Shared Folders/_Employees/Human Resources/Employee Relations.
- (4) If you use this option, skip to **Step 2** below.

Important: *This is the official Georgia Tech Human Resources (GTHR) Performance Appraisal Record template. No other versions should be created, used or shared. Questions regarding the performance appraisal process should be directed to employee-relations@ohr.gatech.edu. For technical issues, submit a ticket via ServiceNow.*

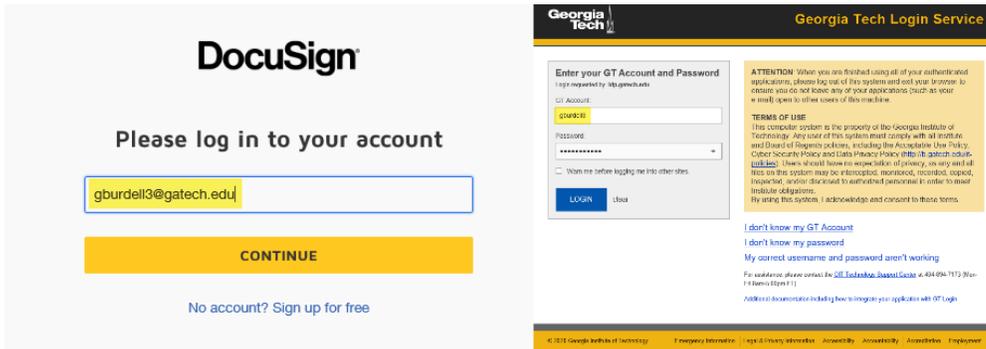
Completing the Form

The following steps will guide you through the completion of the Performance Appraisal Record.

Step 1:

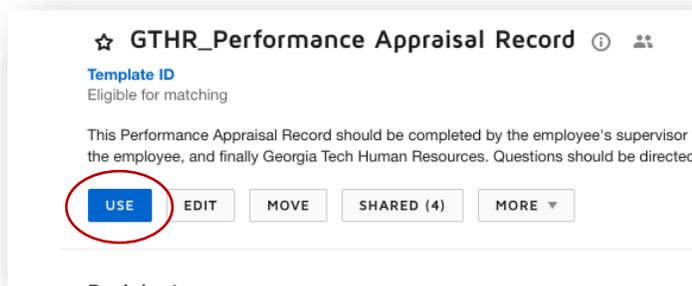
Log into DocuSign using your standard Georgia Tech credentials and email address to login (i.e. gburdell3@gatech.edu)

Using your Georgia Tech login will allow you to track the progress of everyone who has been asked to sign your form within your DocuSign account.



Step 2:

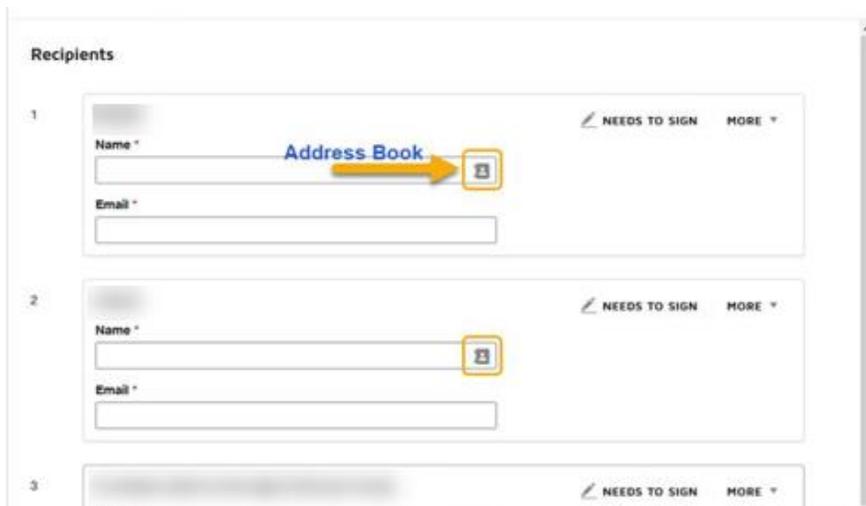
Select the blue “USE” button to begin.



Step 3

For each Georgia Tech recipient, please use the address book icon to find the appropriate person and ensure the recipient signs in with Georgia Tech credentials. This will allow them to track the progress of your document and access your signature request in DocuSign.

As the supervisor, you will be selecting yourself as the first recipient. Find your supervisor, the employee and the appropriate HR professional for the remaining recipient fields.



Recipients

1

Name * [Address Book](#) 

Email *

NEEDS TO SIGN MORE ▾

2

Name * 

Email *

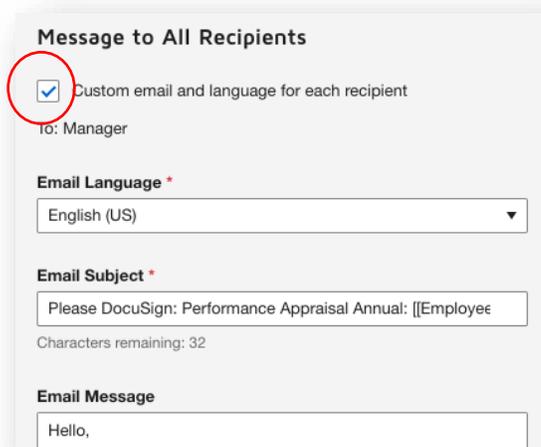
NEEDS TO SIGN MORE ▾

3

NEEDS TO SIGN MORE ▾

Step 4

At the bottom of the screen, you will see a checked box to create a custom email and language for each recipient. These messages have been pre-populated for your convenience. You can also add personalized notes, as needed.



Message to All Recipients

Custom email and language for each recipient

To: Manager

Email Language *

English (US) ▾

Email Subject *

Please DocuSign: Performance Appraisal Annual: [[Employee

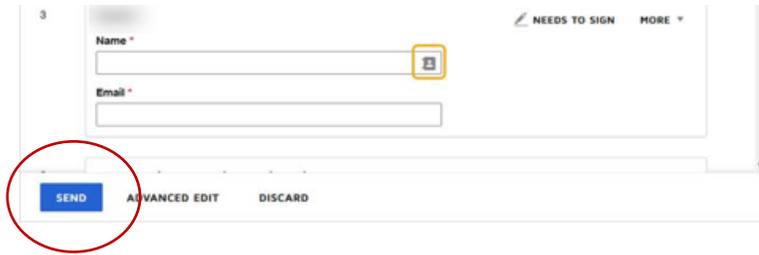
Characters remaining: 32

Email Message

Hello,

Step 5

Once you have entered all required recipients and any optional email message information, select "SEND."



After clicking SEND, the document is electronically routed via email to each recipient.

Step 6

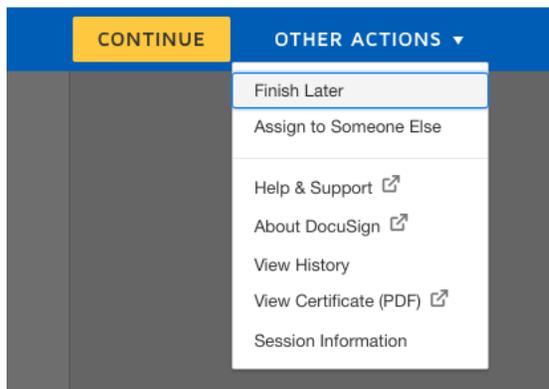
You, as the sender and first recipient, will complete the form in DocuSign (via the email link you receive or in your DocuSign account).

As the supervisor, you will need to complete the assigned fields. If an area is not assigned to you, it will not be fillable.

When you complete the form, you will notice the other recipients' names are not yet listed on the form. However, their names will autofill when they open the form.

Step 7 (Optional)

If cannot complete the form, you can save your progress and come back later. In the top right of the screen under "Other Actions" select "Finish Later" and the form will be waiting for you to complete when you log back into DocuSign.



When all recipients have finished signing the document, everyone will receive a PDF copy of the signed form via email attachment. We recommend you save the attachments because DocuSign only retains documents for 6 months.

For questions regarding the performance appraisal process contact: employee-relations@ohr.gatech.edu