Performance Management Training for Supervisors

2022

Presenter: Eileen Caufield, HR
Today’s Topics

• Evaluating performance via the RED form
  • Objectives
  • Competencies
  • Professional Development
• Using Formstack to Complete the RED Form for employees
• Tips for scheduling and conducting the feedback sessions in a virtual environment
Purpose of Performance Assessment

• Creates a forum for open dialogue between employee and manager.

• Provides an opportunity for managers to share the direction of the University/department/unit and how each employee’s job fits in.

• Clarifies mutually understood expectations and provides a basis for measuring an employee’s ongoing performance.

• Provides opportunity for coaching and giving feedback.
Stages of Performance Cycle

- Beginning of Performance Cycle
- During Performance Cycle
- End of Performance Cycle
- Final Assessment
## Performance Weighting Breakdown

### June 1\textsuperscript{st} through May 31\textsuperscript{st}

<table>
<thead>
<tr>
<th>Objectives</th>
<th>60%</th>
<th>What</th>
<th>Achievements, results, outputs measured in terms of Quality, Quantity, Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. John’s University’s Values at Work &amp; Competencies</td>
<td>40%</td>
<td>How</td>
<td>Through St. John’s University’s Values, how do you apply behaviors, skills knowledge to the job</td>
</tr>
<tr>
<td>Development Plan</td>
<td></td>
<td>How to</td>
<td>Opportunities to grow or improve</td>
</tr>
</tbody>
</table>
Performance Planning: Objective Setting

- Occurs at the beginning of the cycle. Foundation for the whole process.
- Lets you know what’s expected and how your performance will be assessed.
- Gives you the opportunity to provide input about how to perform your job.
- Helps you stay on track and remain clear on changing priorities throughout the cycle.
- Positions you for success; eliminates surprises.
- Focuses on the results of your work.
- Aligns the institutional priorities throughout the organization so that we’re all working toward the same end.
How Are Objectives Developed?

STRATEGIC PLAN

DEPARTMENT’S GOALS

YOUR MANAGER’S OBJECTIVES

YOUR OBJECTIVES
Think About:

▪ How to translate tasks into results and differentiate between a task and the expected result(s) of the effort.

▪ The specific results you will be held accountable for.

▪ Why are you doing this? How will you know if your goal has been achieved?

▪ Who receives the service you provide?

▪ What do the recipients expect in terms of quality, quantity and timeliness?

▪ The SMART Criteria.
Manager communicates to employee job objectives for performance cycle

- Identify a minimum of 3 objectives (recommend no more than 5)
- Align job objectives to department objectives and foundational themes
- Ensure objectives meet S.M.A.R.T. criteria (Specific, Measurable, Attainable, Relevant, and Time-Bound)
- Link objectives/key responsibilities to the job. **Note:** If 2 or more employees perform the same job, then objectives & responsibilities must be the same
- Specify a weighting for each objective/key responsibility
<table>
<thead>
<tr>
<th>Objective</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective 1</strong> – Design and Delivery of Training Programs- During the fiscal year, deliver 2-3 workshops for each of the following programs): Quality Service, Time Management, Active Listening, Effective Meetings, Coaching, Managing for Success, etc., with a very good/excellent rating of 90% and ensure participation rate is consistent with targets</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Objective 2</strong> – Complete the certificate tracking project so that each active administrator and staff member has a completed profile established in the Excel spreadsheet by May 31, 2022.</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Objective 3</strong> – Develop a Telecommuting online course in Canvas, complete with evaluation and review questions, by April 30, 2022.</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Objective 4</strong> – Develop and pilot <em>Adapting to Change</em> by August 31, 2021. Train 25 people by 12/31/21 with a very good/excellent rating of at least 90%.</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Objective totals</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
The Mission/St. John’s Values at Work are expressed & integrated into the work at St. John’s through the following competencies:

- Provide Timely and Excellent Service
- Diversity & Inclusion
- Shared Ownership & Accountability
- Communication
- Collegiality & Teamwork
- Adapting to Change
- Quality of Work
The Mission/St. John’s Values at Work are expressed & integrated into the work at St. John’s through the following competencies:

- Provide Timely and Excellent Service
- Planning & Strategic Vision
- People Management
- Communication
- Collegiality & Teamwork
- Quality of Work
- Diversity & Inclusion
- Shared Ownership & Accountability
- Change Management
Professional Development Plan –
this section is used to identify skills, knowledge and abilities for future growth, growth in the current job or competency development.

Managers must:
➢ Partner with employee to establish plan to develop knowledge, skills and abilities;
➢ Provide a timeline within performance review period for progress
➢ Ensure employee is compliant in all University required training. Ask each employee to attach a copy of his/her training profile.
During the Performance Cycle

| Check in with employees throughout the year to ensure employees are on track and objectives remain relevant |
| Note significant accomplishments, changes in direction, or areas for improvement |
| Any changes in objectives during the reporting period must be discussed with the employee and signed and dated by both manager and employee |
| No rating and no paperwork submitted to HR |
End of Performance Cycle

• **End of May** - Request that employees complete self-assessment for submission by second week of June (in typical year). **This year, complete self-assessment within 30 days of receiving link to Formstack RED Form.**

• **By July 31** - Prepare final assessment using the employee’s self-assessment as a guide. Managers are asked to write their final assessment in the Formstack RED Form.

• **Note:** If you need additional time to submit your ratings, please contact your HR Services’ representative.

  Karen Crowley: 718-990-1502; Cynthia Simpson: 718-990-6333.
Writing Comments

• Consult your performance log.
• Ensure that comments include specific, factual and descriptive examples that are job-related and behaviorally written.
• Make sure comments match the rating.
• Strive for clarity.
• Focus on accomplishments and results produced.
• Identify strengths and development areas.

Note: If you are a new manager or you have new direct reports, you should contact HR Services for a copy of your direct reports’ prior year evaluation.
Comments are required for each rating except **PW**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EP</strong> = Exceptional Performance</td>
<td>Performance consistently and significantly exceeds departmental and position expectations</td>
</tr>
<tr>
<td><strong>PW+</strong> = Performs Well Plus</td>
<td>Performs well in all aspects of the job, exceeds expectations in a few areas</td>
</tr>
<tr>
<td><strong>PW</strong> = Performs Well <strong>(no written rationale required)</strong></td>
<td>Performance consistently meets expectations and job requirements</td>
</tr>
<tr>
<td><strong>NI</strong> = Needs Improvement</td>
<td>Performance consistently does not meet expectations and improvement is required.</td>
</tr>
<tr>
<td><strong>DNM</strong> – Does not meet expectations</td>
<td>Performance does not meet expectations</td>
</tr>
</tbody>
</table>
Completing Your Self Assessment

- Use the RED form to complete your self-assessment.
- Send self-assessment to your manager prior to your performance discussion meeting.
- Be as honest and factual as possible.
- List all of your accomplishments from the year; note reasons for set-backs.
- Include enough specific details so that your manager understands your contributions.
- Highlight changes in priorities that arose during the cycle.
- Expect your manager to add comments accordingly.
- Understand that your supervisor has final say.
I have been attending departmental meetings with the goal of making suggestions to improve work processes, and one of my suggestions, xxxxxxxx, resulted in a change in procedures that has saved the department over $2,000 this year alone.

Despite the reduced headcount in our department, I have completed my database project on time and $1,000 under budget. As a result, students can now access their information in two clicks instead of four and the information is updated immediately instead of every 24 hours.

During the past year, I documented 5 of 7 work processes that were used to train new student workers hired by the department. The documentation resulted in reduced time spent to train the student workers and now serve as desk procedures.
Participating in the Performance Discussion

▪ Refer back to your list of accomplishments.

▪ Complete your Self-Assessment before the meeting. Be objective about the things you did well and the areas where you could have done better.

▪ Be prepared to discuss your Self-Assessment during the meeting with your manager.

▪ Discuss areas you would like to develop and/or career interests you may have.

▪ Be open to feedback and ask questions if you don’t understand something.
HR Services Contacts: ext. 1502 or 6333

Employee Assistance Program (EAP)

University Information System (UIS) – list of training workshops

HR Training & Development Professional Development Workshops and Certificate Programs

LinkedIn Learning.com
Supervisors should send to their direct reports, via email, the RED form complete with their narrative comments and ratings at least 24 hours before the scheduled meeting.

Plan on each meeting to last 45-60 minutes.

Conduct the meeting in-person, via TEAMS, or WebEx Meetings.

Use your webcam for these meetings – it is important that supervisors and direct reports see each other.

Discuss the present year’s performance and toward the end of the meeting discuss next year’s goals.
Tips for Conducting your Feedback Meetings

- Focus on the priorities.
- Describe specific situations or behavior.
- Focus on the work; relate feedback to objectives and expectations.
- Balance positive and constructive statements.
- Try to see things from the employee's perspective; share your own experiences.
- Present corrective feedback in positive, actionable way.
- Ensure that the employee understands by asking them to summarize.
- Follow up to monitor improvements and set follow up dates.
**Additional Resources**

<table>
<thead>
<tr>
<th>Contact</th>
<th>Telephone #</th>
<th>Email address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Crowley</td>
<td>718-990-1502</td>
<td><a href="mailto:crowleyk@stjohns.edu">crowleyk@stjohns.edu</a></td>
</tr>
<tr>
<td>Cynthia Simpson</td>
<td>718-990-6333</td>
<td><a href="mailto:simpsoc1@stjohns.edu">simpsoc1@stjohns.edu</a></td>
</tr>
</tbody>
</table>

**HR Services' Web page**

**Resources for Telework Success**
Employee Starts RED Process
All employees will receive an email from the Office of Human Resources transmitting a link to the RED Form.

**Note:** Training recommends that you create an Outlook email archive folder for yourself and label it RED 2022 to store the RED-related emails you will receive from HR and Formstack.
Click on the **RED Form** link.

You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**, enter the code and click on **Verify**.
Result after you enter your verification code: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.
Accessing the RED Form from the HR Webpage

1. Login to the St. John’s website
2. Scroll to the footer and select Human Resources
3. From the HR webpage, click on Human Resources Services
4. Scroll down to the section that reads **Employee Performance Management – Recognize Excellence and Development (RED)** and in the expandable section **For All Employees**, click on the plus sign + to expand the section

**Employee Performance Management - Recognize Excellence and Development (RED)**

RED is St. John’s University’s annual, cyclical, performance management program for staff and administrators. To help employees and supervisors get the most out of the performance management process, the following resources, tools and training are provided:

For All Employees
5. Click on the RED Form at the entry, *Access the RED Form*

Result: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.
On the Formstack Form for Recognize Excellent and Development (RED) enter the required demographic information. **Note:** Some of the information will be pre-filled for you. Any field marked with an asterisk requires you to enter information; otherwise, you will not be able to submit the form.

Enter the following on the RED Form:

1. Your **First Name**, **Last Name**, **Job Title**, **St. John’s Email** address (confirm you email address) and **XID number**. **Note:** You can find your **XID number** on your pay statement above your name and SSN.

2. Select your **School or Department** from the drop-down menu.

3. Leave blank the field that asks for the **Periodic Check In Date** since this is the final assessment.
Completing the RED Form in Formstack – Supervisor’s Information

Enter the following on the RED Form:

1. Your supervisor’s **First Name, Last Name**, and **St. John’s Email** address (confirm the email address)

2. **Note:** It is important that you enter your supervisor’s St. John’s email address because when you submit the form, the form will be sent to the email address of the supervisor whose name you entered onto the form.

![Supervisor's Information Form](image)
For tips on how to write the objectives/key responsibilities, click on the arrow labeled **Beginning of Performance Cycle.**

Write down the objectives (one objective per box) that reflects the major work performed during the reporting cycle. **Note:** You should have between 3-5 major objectives.
Competency Section of RED

Although you are not asked to rate yourself on the competencies, you should view the list of competencies to address when writing your self-assessment. You can find the list of competencies on the HR Services webpage in the RED Section. Your supervisor will add the ratings for the competencies.

1. Provide Timely and Excellent Service:

2. Diversity and Inclusivity:

   Demonstrates the ability to communicate across differences to create a collaborative, collegial, and caring community. Actively seeks and considers perspectives and experiences from people different from oneself.

3. Shared Ownership/Accountability:

   Understands and takes responsibility for individual role in achieving department/university-wide objectives.

4. Adapting to Change:

   Demonstrates resiliency. Maintains effectiveness when faced with changes in direction, priorities, schedules, and responsibilities.

5. Collegiality and Teamwork:

   Works collaboratively and respectfully within and across departments.

6. Communication:

   Communicates clearly, concisely, and respectfully in all interactions.

7. Quality of Work:

   Provides accurate complete products and services.

8. People Management:

   Communicates with employees to set expectations, mentor, coach, support. Sets direction and leads team.

9. Planning and Strategic Vision:

   Develops plans to support business unit objectives.

Note: Competencies #8 & 9 are for administrators who supervise non-supervisory administrators and staff.
On the RED Form, there is space to enter the steps you have taken to enhance skills/knowledge and abilities during the past year. Identify the skill, the action to be taken and the results i.e., if the action was completed during the past year. Provide this information to your supervisor so they can enter this information on your RED Form. Note: Also, think of additional development opportunities to add to the RED Form for the next year.
For tips on how to write the self-assessment, click on the arrow labeled **End of Performance Cycle.**

In the box labeled **Employee’s Self-Assessment,** write how you met each objective. Where possible, provide data to support how well you met the objective. Also, address how well you met each one of St. John’s competencies.

**Important:** Prepare and save your self-assessment in a Word document before copying and pasting into the Formstack RED Form.
If you are finished with the self-assessment, click on **Submit Form** to submit the self-assessment to your supervisor.
Upon submission of your RED form and self-assessment to your supervisor, you will receive an email from the Office of Human Resources acknowledging completion of your form and informing you that your supervisor has the action to complete their section of the RED Form.
After your supervisor completes the ratings and supervisor’s summary and submits the form, Formstack sends you and your supervisor an email that the Supervisor submitted their ratings and narrative to you, their employee, and transmits a sample copy of the RED Form.
After your supervisor completes the ratings and supervisor's summary and submits the form, Formstack sends you and your supervisor a sample copy of the RED Form. Supervisors are required to schedule a meeting with their direct reports to discuss the RED Form.
After the one-on-one meeting is held, supervisor signs the employee’s RED Form, and the employee receives a workflow assignment requesting their signature on the RED.

The employee needs to access the Formstack Workspace by clicking on Visit Workspace to Complete Task to sign the employee’s RED Form.

Or, you can access the Workspace by clicking on the Formstack tile from the dashboard.
You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on **Log into Formstack**.
Select Log in with SignOn.

**Note:** If you are already signed in with your Okta sign-in, you will be brought to your Formstack Workspace. If you have not signed into Okta, you will be asked to enter your St. John’s username and password.
Logging into Formstack to Sign RED Form

You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**, enter the code and click on **Verify**.
Click on **Recognize and Excellence and Development Workflow v4.2** from the Formstack Workspace.
Click on the Workflow # that corresponds to your RED Form.
While on the screen that displays your RED Form, click on Open Form to open-up the RED Form.
Scroll through the RED Form until you arrive at the Employee Signature section.

**Note:** At this point you have the option to enter additional comments if you do not agree with the supervisor’s comments or wish to provide an additional explanation in response to supervisor’s comments.

If you wish to add comments,
1. Select Yes in response to the question that asks for additional comments
2. Enter comments in the text box
3. Enter First Name, Last Name, Date of Employee Completion (Signature)
4. Click on Submit Form.
If you have no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,

1. Enter **First Name**, **Last Name**, and **Date** when you complete the form.
2. Click on **Submit Form**.
After you sign and submit the RED Form, Formstack sends to both the supervisor and you, the employee, an email notifying you that the process has been completed and Formstack transmits a final copy of the RED to both you and your supervisor.
Formstack sends to both the supervisor and the employee a final copy of the RED. Copies are also sent to HR and uploaded to Banner Xtender.
Important: Prepare and save your self-assessment in a Word document before copying and pasting into the Formstack RED Form.

If you have not completed the self-assessment, and you wish to save it to work on at a later date, click on **Save and Resume Later**.

*Nothing contained in this St. John’s Performance Assessment alters the “at-will” nature of your employment, which means that both you and St. John’s University may terminate the employment relationship at any time, with or without notice, reason or cause.*
In response to the system’s prompt, click on **Save and get link**.
If you elected to have Formstack send you the link, you will receive a confirmation with a note that the RED Form was sent to your email address. If you did not receive the link, click Resend email.
Note: If you selected **Save and Resume Later**, you will receive an email sent to your St. John’s email address from the Office of Human Resources with a link to your partially completed RED Form. **Important – You have 30 days to resume completing the form.** At this point, you have two options: (i) Save the link or (ii) enter your St. John’s email address and click on **Send Save and resume link**. **Result:** You will receive an email with the link to the partially completed RED Form.
If you elected to have Formstack send you the link, you will receive an email from the Office of Human Resources with the link to the RED Form. Save the email and be sure to resume work on the RED Form within 30 days of receipt of the email. If you wait more than the 30 days, then you will have to start the form from the beginning.
When you click on the link in the email from Human Resources, you will be asked to provide the two-factor authentication. Send the code, enter the code and click on **Verify**.
Saving the RED Form to Complete Later

You will be brought to the partially completed RED Form.

Complete the form and click on **Submit Form** to submit the form to your supervisor.

Recognize Excellence and Development (RED) Employee Information
For instructions, click on an icon for the relevant stage of the performance cycle below to learn more.

Please complete all information below:

- **Employee's Name**:
  - First Name
  - Last Name

- **Employee's Title**: Multimedia Engineer

- **Employee's Email**: skernan@sju.edu

- **Employee X-Number**:

- **Employee School or Department**: Information Technology Support

- **Periodic Check In Date**: 

Something contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.
Using Formstack to Complete RED Forms for Direct Reports
When a direct report submits a completed self-assessment, you will receive an email from the Office of Human Resources informing you that a RED Form has been submitted. You can click on the word **here** in the email to login into your Formstack account.

**Important:** Note the **Workflow ID#** that appears in the email (#11 in the illustration). You will need to select this number in the Formstack Workspace to open-up the employee’s RED Form. The employee’s name will not appear in the Formstack Workspace, only the Workflow ID #.
You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on Log into Formstack.
Select Log in with SignOn.

**Note:** If you are already signed in with your Okta sign-in, you will be brought to your Formstack Workspace. If you have not signed into Okta, you will be asked to enter your St. John’s username and password.
Logging into Formstack to Sign RED Form

You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on Send code, enter the code and click on Verify.
Click on **Recognize and Excellence and Development Workflow v4.2** from the Formstack Workspace.
Click on the **# of the assessment** associated with the direct report that completed the RED Form. **Note:** Click on #11 since that is the number of the workflow that was contained in the email from HR.
The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).
View the direct report’s RED Form and scroll through the form to add your ratings and narrative. **Note:** The employee portion of the RED Form will appear grayed out. You cannot edit what the employee entered.
When a direct report submits a completed self-assessment, you will receive an email from Formstack notifying you that a RED Form has been assigned to you. However, in the email from Formstack, the name of the direct report does not appear. You can open the RED Form one of two ways: (1) Click on Open Form or (2) Click on Visit Workspace to Complete Task. The instructions on the following slides are for Visit Workspace to Complete Task, which is an easier way to access the form than the Open Form option.

Note: #11 in the red box indicates the number Formstack assigned to the direct report who completed the form. This number corresponds to the number of the assessment that has been assigned to you.
You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on Next.

Click on **Log in with SignOn**.

Please enter your password

**EMAIL ADDRESS**
caufiele@stjohns.edu

**PASSWORD**

Log into Forms

OR

Log in with SignOn

Don’t have an account? Try out Forms for free!
You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**, enter the code and click on **Verify**.
Click on **Recognize and Excellence and Development Workflow v4.2** from the Formstack Workspace.
Click on the # of the assessment associated with the direct report that completed the RED Form. **Note:** Click on #11 since that is the number of the workflow and request ID# that was contained in the email from Formstack.
The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).
View the direct report’s RED Form and scroll through the form to add your ratings and narrative. **Note:** The employee portion of the RED Form will appear grayed out. You cannot edit what the employee entered.
Completing the RED Form for a Direct Report
On the direct report’s RED Form, you will be asked to enter your personal information, that is, your

- first and last name,
- your position title,
- your email address (you will be asked to confirm your email address)
- department.
- date of the assessment, for the year-end assessment enter 05/31/yyyy.

Note: If you click on the images for the Beginning of Performance Cycle, End of Performance Cycle and Final Assessment, you will be brought to the instructions for each of those phases.
For each of your direct report’s objectives, enter the weighting of the objective and your rating on it. **Note:** The weighting must equal 100%.

**Reminder:** The system will automatically assign a rating based on the weight of the objective and the rating.
For the competency section, you must identify if the direct report is an employee or supervisor. Why? There are different sets of competencies for employees and supervisors.

**Note:** Click on Employee Competencies for a description of each of the competencies.
Completing the Competency Section

Enter the rating for each competency. The system will automatically assign an overall rating for the competency section based on your rating on each competency.

1. Provide Timely and Excellent Service:

2. Diversity and Inclusivity:

3. Shared Ownership/Accountability:

4. Adapting to Change:

5. Collegiality and Teamwork:

6. Communication:

7. Quality of Work:

Overall Year-end Rating Scale: Competencies / St. John’s mission and values at work:

PW+
The **Final Rating** for both the objective and competency sections is automatically calculated by Formstack.

### Overall Performance Rating: Year-End Assessment

<table>
<thead>
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<th>EP</th>
<th>Exceptional Performance (requires written supporting rationale)</th>
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<tbody>
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<td>Performs well in all aspects of the job; exceeds expectations in a few areas (requires written supporting rationale)</td>
</tr>
<tr>
<td>PW</td>
<td>Performs well in all aspects of the job</td>
</tr>
<tr>
<td>NI</td>
<td>Needs Improvement (requires written supporting rationale)</td>
</tr>
<tr>
<td>DNW</td>
<td>Does not meet expectations (requires written supporting rationale)</td>
</tr>
</tbody>
</table>

*Comments required for each rating except PW*

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**Final Rating:**

**PW+**
Purpose: To provide employees with an opportunity for professional growth and to assist those who may be struggling with recommendations for ways to develop needed skills and knowledge.

Note: Click on the Professional Development icon to access a description of the Professional Development Plan and its purpose.
On the direct reports’ RED Form, enter if the employee completed their Professional Development Plan. Verify that the employee completed the actions within the time frame identified. Also, think of additional development opportunities to add to the employee’s RED Form for the next year.

**Note:** The employee will provide you with information on the development plan completed.
Supervisors must provide a narrative for any objective or competency rating other than a PW rating. Supervisors must justify a rating of EP, PW+, NI, DNM. However, it is recommended that supervisors address each objective and competency.

Note: Click on the Rating Descriptions for a description of the ratings and behavioral descriptors associated with each rating.
Upon completion of the Supervisor’s Summary, click **Submit Form.**

Formstack sends you and your direct report an email that the Supervisor submitted their ratings and narrative to the employee. Both receive a **sample** copy of the RED Form. You are required to schedule a meeting with your direct report to discuss the RED Form.
Formstack sends you and your direct report an email that you, their supervisor, submitted their ratings and narrative to the employee. Both receive a sample copy of the RED Form. You are required to schedule a meeting with your direct report to discuss the RED Form.
After the supervisor submits the RED Form to the employee, Formstack sends to the supervisor an email notifying them that they have an additional workflow to complete (one-on-one meeting with employee). The workflow will remain opened until both the supervisor & employee sign the RED Form.

Notice that a Review Meeting has been assigned.

The supervisor needs to access the Formstack Workspace by clicking on Visit Workspace to Complete Task to sign the employee's RED Form.

Note: One can access the Workspace by clicking on the Formstack tile from the dashboard.

Log into Formstack and access the Workflow ID# (11) assigned to the direct report.
After the supervisor and employee conduct the one-on-one review meeting, the supervisor should access the Formstack Workspace to sign the employee’s RED Form.

Supervisor enters their First Name, Last Name and Date when the meeting with employee was conducted.

Click on Submit Form.
After the supervisor signs the employee’s RED Form, the employee receives a workflow assignment requesting their signature on the RED.

After Review Meeting has been held – Employee Signature Required

The employee needs to access the **Formstack Workspace** by clicking on **Visit Workspace to Complete Task** to sign the employee’s RED Form.

**Note:** One can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.
After the employee receives the email that the supervisor signed the RED Form, the employee is asked to sign the form.

**Note:** At this point the employee has the option to enter additional comments if they do not agree with the supervisor’s comments or wish to provide additional explanations in response to supervisor’s comments.

**If employee wishes to add comments,**
1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments
3. Enter **First Name, Last Name, Date of Employee Completion (Signature)**
4. Click on **Submit Form.**
If the employee has no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,

1. Employee enters **First Name**, **Last Name**, and **Date** when employee completes the form.

2. Click on **Submit Form**.
After the employee signs and submits the RED Form, Formstack sends to both the supervisor and the employee an email notifying them that the process has been completed and transmits a final copy of the RED.
After the employee signs and submits the RED Form, Formstack sends to both the supervisor and the employee a final copy of the RED. Copies are also sent to HR and uploaded to Banner Xtender.
Thank you!

Please remember to complete the evaluations.

<table>
<thead>
<tr>
<th>HR Services Representatives</th>
<th>Contact</th>
<th>Telephone #</th>
<th>Email address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Karen Crowley</td>
<td>718-990-1502</td>
<td><a href="mailto:crowleyk@stjohns.edu">crowleyk@stjohns.edu</a></td>
</tr>
<tr>
<td></td>
<td>Cynthia Simpson</td>
<td>718-990-6333</td>
<td><a href="mailto:simpsoc1@stjohns.edu">simpsoc1@stjohns.edu</a></td>
</tr>
</tbody>
</table>