Instructions for Supervisors to Access Employee’s RED Form in Formstack

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. There are two methods to access the employee’s RED Form.

First Method – Click on the word, here, in the email from the Office of Human Resources.

1. 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#. However, their name does appear in the email heading and body of the email.
2. You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on **Log into Formstack**.

3. Select **Log in with SignOn**.
4. 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**.

5. Click on **Recognize and Excellence and Development Workflow v4.2** from the Formstack Workspace.
6. 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.

7. The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).

8. 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 the information the employee entered.
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:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Title</th>
<th>Employee Email</th>
<th>Employee ID Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Last Name</td>
<td>Media Engineer</td>
<td>Email address</td>
</tr>
<tr>
<td>First Name</td>
<td>Last Name</td>
<td>Media Engineer</td>
<td>Email address</td>
</tr>
</tbody>
</table>
Second Method – Accessing the Employee’s RED Form via the email received from Formstack

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. No employee name is provided in the email from Formstack.

Instructions on this updated process can be found here.

Sincerely,

St. John’s University Human Resources

718-990-1865

If you experienced any issues with this form, please open a ticket with Information Technology

Open form to fill out your assigned task:

Visit Workspace to Complete Task

1. Click on Visit Workspace to Complete Task
2. You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on **Next**.

3. Click on **Log in with SignOn**
4. 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.

5. Click on Recognize and Excellence and Development Workflow v4.2 from the Formstack Workspace.
6. 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.

7. The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).

8. 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 the information the employee entered.