

Handout #5

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.

Nicholas Skrotzki has completed their Recognize Excellence and Development (RED) Employee Self Assessment: 11

Office of Human Resources via Formstack
To: Eileen Caulfield
Mon 8/1/2022 2:09 PM


Workflow ID: 11 | Date Completed: Aug 1, 2022 2:09 PM

Hello Eileen Caulfield,

Nicholas Skrotzki has completed their Recognize Excellence and Development (RED) Employee Self Assessment! Below you'll find a copy of their submission for your phase of the performance evaluation can now begin. Please go to the following link to [click here](#) in the Supervisor portion of the review. You can access this and any other Employee's Recognize Excellence and Development Employee Self Assessment by clicking [here](#), and logging into your Formstack account.

Nicholas Skrotzki has provided the following Objectives/Key Responsibilities and a Self Evaluation for you to reference during your evaluation. If changes need to be made to objectives submitted by Nicholas, please inform them and you can make adjustments.

Objective/Key Responsibility #1:
Day-to-Day: Assist in the IT operations of the Queens. Where appropriate, collaborate with IT operation team members to deliver services. Coordinate with IT teams through the use of the ITSM system.

Objective/Key Responsibility #2:
Improvement: Work with the members of the IT team to further enhance the overall operation and service delivery to the St. John's community. Evaluate the performance and quality of the services delivered and participate in the continual service improvement process.

Objective/Key Responsibility #3:
Outreach: Meet with the St. John's community with the goal of communicating services, addressing service concerns, and discuss future IT related projects.

Objective/Key Responsibility #4:
Learning: In combination with on-the-job training, LinkedIn Learning, and approved conferences/trainings/seminars, continue to expand the breadth and depth of applicable knowledge. Furthermore, share any key findings with fellow team members.

Objective/Key Responsibility #5:

Employee's Self-Assessment:
I continue to excel as a collaborator and key resource in the organization. I can be given challenging projects and bring them to completion. I work well with customers, including challenging ones. I have a desire to broaden the organization's technology, which is highly beneficial. I need to continue to work on time management and the delivery of projects in a timely fashion. Also, I need to continue to improve my accuracy in the development of project details and requirements.

Sincerely,
St. John's University Human Resources
718-990-1865

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2. You will be brought to the login screen for Formstack. Enter your St. John's email address and click on **Log into Formstack**.

Welcome back to Formstack

EMAIL ADDRESS

Log into Formstack

OR

 SIGN IN WITH GOOGLE

[Forgot Your Password?](#)

[Don't have an account? Try out Formstack for free!](#)

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

Please enter your password

EMAIL ADDRESS [Log in as different User](#)

PASSWORD [Forgot Your Password?](#)

Log into Forms


OR



Log in with SignOn

[Don't have an account? Try out Forms for free!](#)

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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**.

Connecting to  formstack
Sign-in with your St. John's University account to access
Formstack Forms

SMS Authentication
(+1 XXX-XXX-6902)

[Sign Out](#)


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

forms Workspace 🔔 👤 Eileen Caulfield

Assigned Tasks [Refresh](#)

- 🔔 Recognize Excellence and Development Workflow v4.2

#11

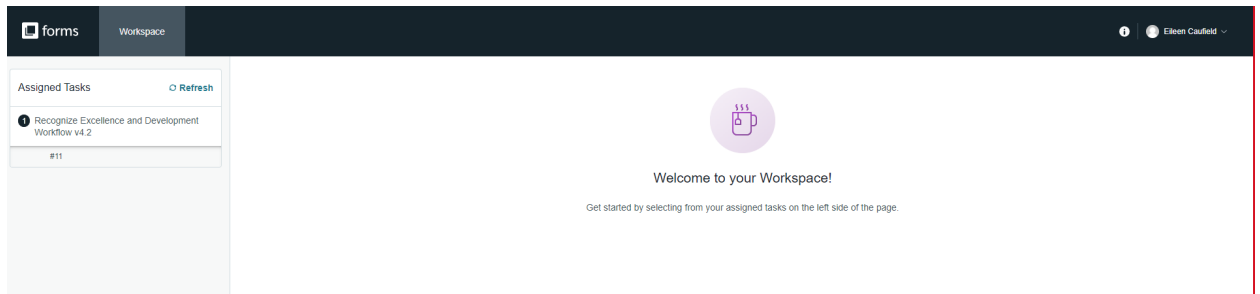


Welcome to your Workspace!

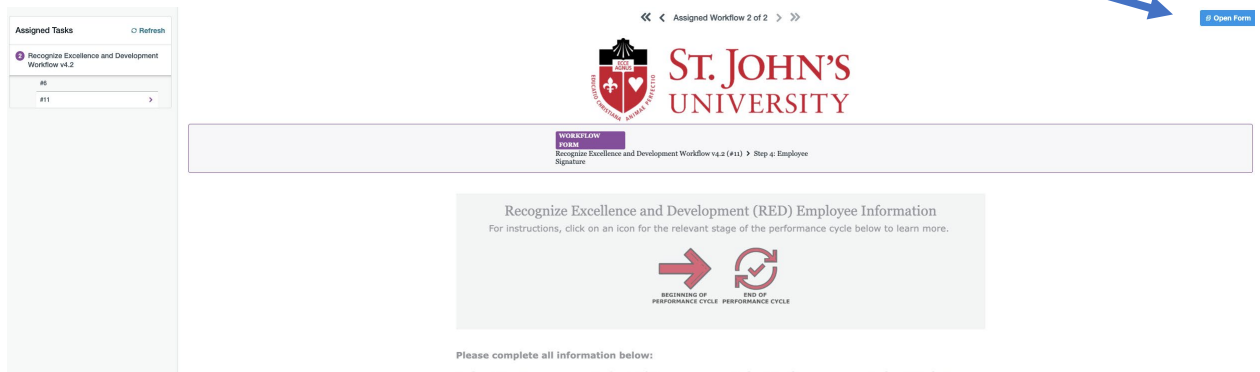
Get started by selecting from your assigned tasks on the left side of the page.

Handout #5

- 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 the information the employee entered.



ST. JOHN'S
UNIVERSITY

**WORKFLOW
FORM**

Recognize Excellence and Development Workflow v4.2 (#12) > Step 2:
Supervisor Assessment

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.



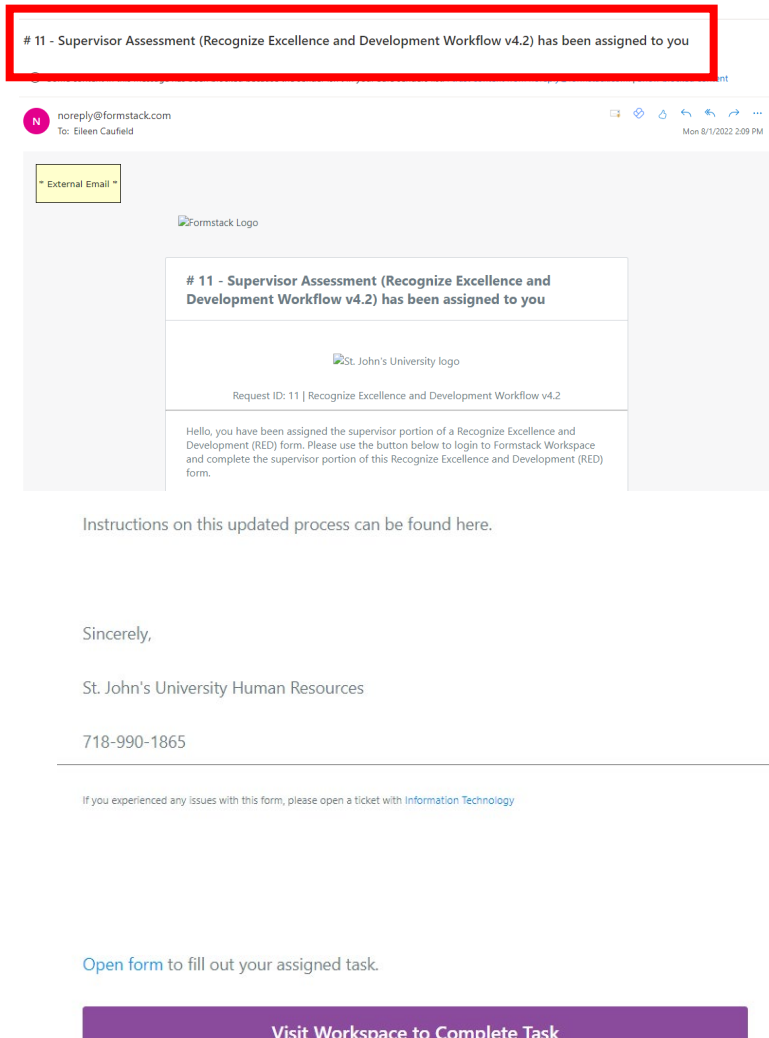
Please complete all information below:

Employee's Name *	Employee's Title *	Employee's Email *	Employee X-Number *
<input type="text"/>	Multimedia Engineer	<input type="text"/>	X5555555
<small>First Name Last Name</small>		<small>Please enter your St. John's University email address</small>	

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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.

1. Click on **Visit Workspace to Complete Task**

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2. You will be brought to the login screen for Formstack. Enter your St. John's email address and click on **Next**.

Welcome back to Forms

EMAIL ADDRESS

Next

OR

Don't have an account? [Try out Forms for free!](#)

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

Please enter your password

EMAIL ADDRESS [Log in as different User](#)

PASSWORD [Forgot Your Password?](#)

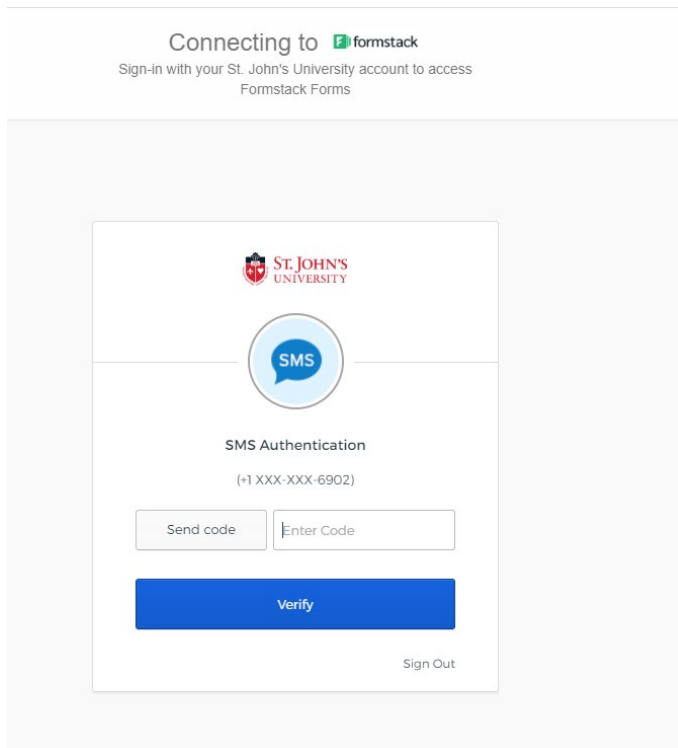
Log into Forms


OR



Don't have an account? [Try out Forms for free!](#)

Handout #5

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**.



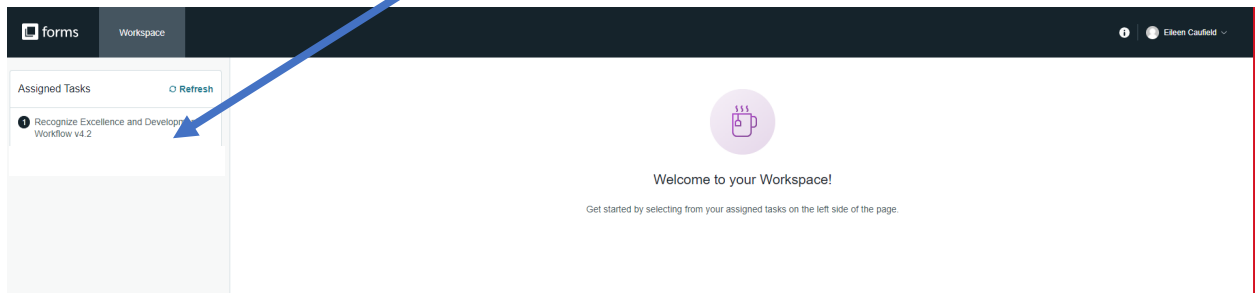
Connecting to  formstack
Sign-in with your St. John's University account to access
Formstack Forms






SMS Authentication
(+1 XXX-XXX-6902)


[Sign Out](#)


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



forms Workspace  Eileen Caulfield

Assigned Tasks 

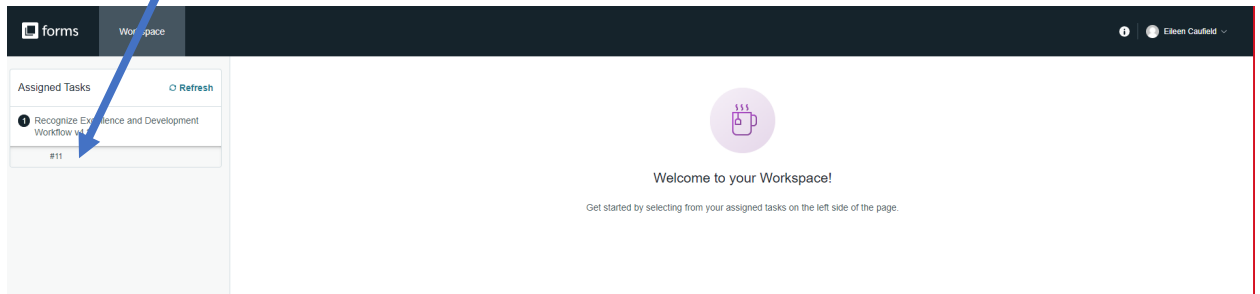
-  Recognize Excellence and Development Workflow v4.2



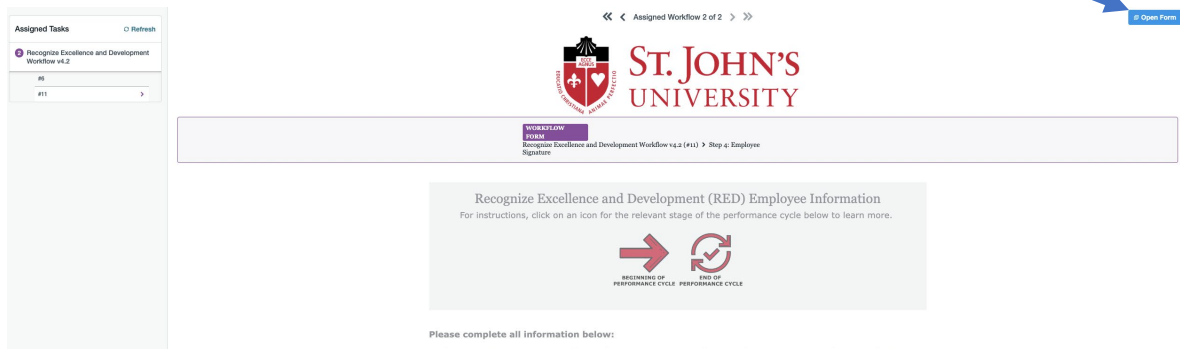
Welcome to your Workspace!
Get started by selecting from your assigned tasks on the left side of the page.

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- 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 the information the employee entered.