Instructions for Signing the RED Form in Formstack

Supervisor Signature on the RED Form

After the one-on-one meeting is held, the supervisor logs into Formstack and signs the employee’s RED Form. To access the Workspace in Formstack,

1. Login into signon.stjohns.edu
2. Enter your username and password
3. Click on the Formstack tile on the dashboard.

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

6. You will be asked to provide the two-factor authentication. Click on **Send code, enter the code** and click **Verify**. Result: You will be brought to the **Workspace**.
7. Click on **Recognize Excellence and Development Workflow v4.2**.

8. Click on the **Workflow #** that corresponds to the employee’s RED Form you need to sign.
9. While on the screen that displays the employee’s RED Form, click on Open Form to open the RED.

10. Scroll through the RED Form until you arrive at the Supervisor Signature section. **Important:** You should sign the form only after the one-on-one meeting with the employee has been conducted.

11. Enter your First Name, Last Name, Supervisor Completion Date (date of the meeting with the employee).

12. Click on Submit Form.
Employee Countersigns the RED Form

After the supervisor signs the employee’s RED Form, 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. Alternatively, the employee (you) can access the Workspace through Formstack.

# 11 - Employee Signature (Recognize Excellence and Development Workflow v4.2) has been assigned to you

Hello, thank you for completing your one-on-one meeting with your supervisor and now it is your turn to counter sign your Recognize Excellence and Development (RED) form. If you have not yet had your one-on-one meeting with your supervisor, it is highly recommended that you reach out to them to schedule a meeting and to not proceed further. If you have had your one-on-one meeting, then please click the link below to login to Formstack and sign your Recognize Excellence and development (RED) form. It is necessary for you to login and countersign your form to complete the process. Once completed, a finalized PDF will be sent to you and your supervisor for your records.

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

You are receiving this email because you have been assigned as a participant in a Workflow. To learn more, visit our help documentation.

— The Formstack Team
Accessing the Workspace through Formstack.

1. Login into \texttt{signon.stjohns.edu}
2. Enter your \texttt{username} and \texttt{password}
3. Click on the \texttt{Formstack} tile on the dashboard.

4. You will be brought to the login screen for Formstack. Enter your St. John’s email address and click on \texttt{Log into Formstack}.

![Login Screen Screenshot]
5. Click on **Log in with SignOn**

6. You will be asked to provide the two-factor authentication. Click on **Send code, enter the code**, and click **Verify**. **Result:** You will be brought to the Formstack **Workspace**.
Handout #9

7. Click on **Recognize Excellence and Development Workflow v4.2**.

8. Click on the **Workflow #** that corresponds to your RED Form that you need to sign.

9. When your RED Form displays on the screen, click on **Open Form** to open the RED Form.
10. 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 additional explanations in response to the supervisor’s comments.

11a. **If you wish to add comments,**

   a) Select **Yes** in response to the question that asks for additional comments
   
   b) Enter comments in the text box.
   
   c) Enter **First Name, Last Name, Employee Completion Date** (when you sign the form)
   
   d) Click on **Submit Form**.
11b. **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,

a) Enter **First Name, Last Name, and Employee Completion Date** (when you sign the form).

b) Click on **Submit Form**.
12. 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.

13. Copies of the finalized RED Form are sent to the employee, supervisor, HR, and a copy is uploaded to Banner Xtender.

14. Supervisor enters the ratings into UIS.