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.**

**Important:** Note the **Workflow ID#** that appears in the email (#6 in the illustration). You will need to select this number in the Formstack Workspace to open the employee’s RED Form. The employee’s email address will appear in the Formstack Workspace next to the Workflow ID #.

1. You can click on the word **here** in the email to login into your Formstack account.
2. You may be asked to provide a two-factor authentication code to access the RED Form. Click on **Send code**, enter the code, and click on **Verify**.

3. Click on **Recognize Excellence and Development Workflow v4.2.1** from the Formstack Workspace.
4. Click on the **# of the assessment** associated with the direct report that completed the RED Form. **Note:** Click on #6 since that is the number of the workflow that was contained in the email from HR. Note the employee’s email address appears next to the Workflow #.

5. Before you can access the employee’s RED Form, you may be asked to accept Formstack’s **Terms of Service**.
   
   a) Check the box that states, “You have read and agree to all of the above.”

   b) Click on **Proceed to your account.**
6. The RED Form for the direct report is displayed on the screen. Click on **Open Form** (upper right of the screen).

7. 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 in the self-assessment.**
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: #6 in the first red box indicates the number Formstack assigned to the direct report who completed the form. This number corresponds to the number of the assessment/workflow that has been assigned to you. No employee name is provided in the email from Formstack.

1. Click on Visit Workspace to Complete Task.
2. You may be asked to provide a two-factor authentication code to access the RED Form. Click on **Send code**, enter the code, and click on **Verify**.

3. Click on **Recognize Excellence and Development Workflow v4.2.1** from the Formstack Workspace.
4. Click on the # of the assessment associated with the direct report that completed the RED Form. **Note:** Click on #6 since that is the number of the workflow and request ID# that was contained in the email from Formstack. The employee’s email address appears next to the Workflow # associated with the employee.

5. Before you can access the employee’s RED Form, you may be asked to accept Formstack’s **Terms of Service**.
   
   a) Check the box that states, “You have read and agree to all of the above.”
   
   b) Click on **Proceed to your account**.
6. The RED Form for the direct report is displayed on the screen. Click on **Open Form** (upper right of the screen).

7. 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 in the self-assessment.**