

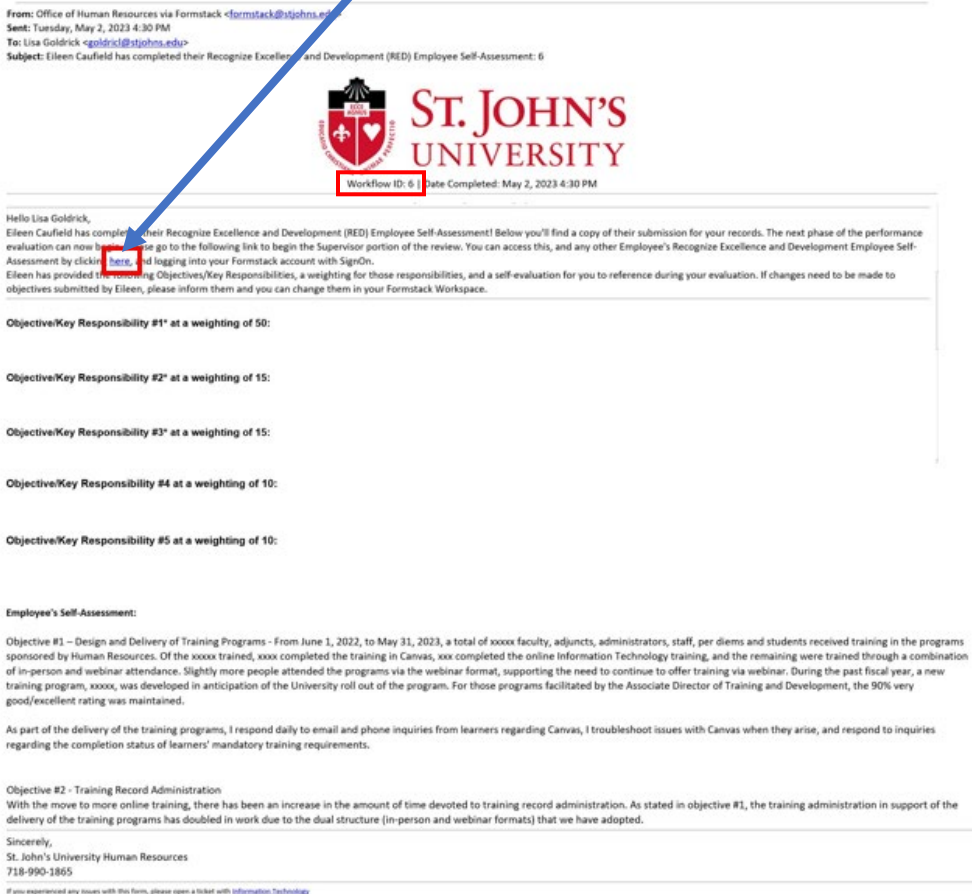
## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

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.



From: Office of Human Resources via Formstack <formstack@stjohns.edu>  
Sent: Tuesday, May 2, 2023 4:30 PM  
To: Lisa Goldrick <goldrick@stjohns.edu>  
Subject: Eileen Caulfield has completed their Recognize Excellence and Development (RED) Employee Self-Assessment: 6

  
Workflow ID: 6 | Date Completed: May 2, 2023 4:30 PM

Hello Lisa Goldrick,  
Eileen Caulfield has completed their Recognize Excellence and Development (RED) Employee Self-Assessment! Below you'll find a copy of their submission for your records. The next phase of the performance evaluation can now begin. Please go to the following link to begin 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 with SignOn.  
Eileen has provided the following Objectives/Key Responsibilities, a weighting for those responsibilities, and a self-evaluation for you to reference during your evaluation. If changes need to be made to objectives submitted by Eileen, please inform them and you can change them in your Formstack Workspace.

Objective/Key Responsibility #1\* at a weighting of 50:  
  
Objective/Key Responsibility #2\* at a weighting of 15:  
  
Objective/Key Responsibility #3\* at a weighting of 15:  
  
Objective/Key Responsibility #4 at a weighting of 10:  
  
Objective/Key Responsibility #5 at a weighting of 10:

**Employee's Self-Assessment:**

Objective #1 – Design and Delivery of Training Programs - From June 1, 2022, to May 31, 2023, a total of xxxxx faculty, adjuncts, administrators, staff, per diems and students received training in the programs sponsored by Human Resources. Of the xxxxx trained, xxxxx completed the training in Canvas, xxx completed the online Information Technology training, and the remaining were trained through a combination of in-person and webinar attendance. Slightly more people attended the programs via the webinar format, supporting the need to continue to offer training via webinar. During the past fiscal year, a new training program, xxxxx, was developed in anticipation of the University roll out of the program. For those programs facilitated by the Associate Director of Training and Development, the 90% very good/excellent rating was maintained.

As part of the delivery of the training programs, I respond daily to email and phone inquiries from learners regarding Canvas, I troubleshoot issues with Canvas when they arise, and respond to inquiries regarding the completion status of learners' mandatory training requirements.

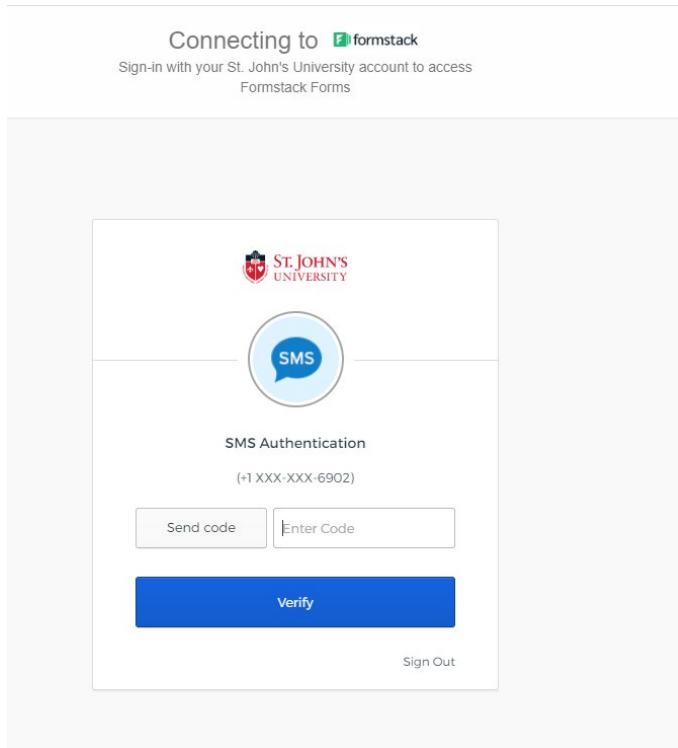
Objective #2 - Training Record Administration  
With the move to more online training, there has been an increase in the amount of time devoted to training record administration. As stated in objective #1, the training administration in support of the delivery of the training programs has doubled in work due to the dual structure (in-person and webinar formats) that we have adopted.


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](#)

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

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**.



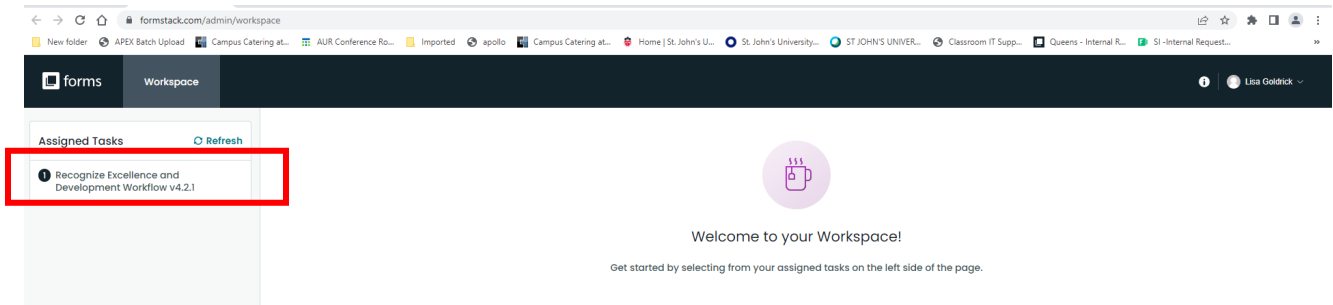
Connecting to  formstack  
Sign-in with your St. John's University account to access Formstack Forms

SMS Authentication  
(+1 XXX-XXX-6902)

[Sign Out](#)

3. Click on **Recognize Excellence and Development Workflow v4.2.1** from the Formstack Workspace.



formstack.com/admin/workspace

Workspace

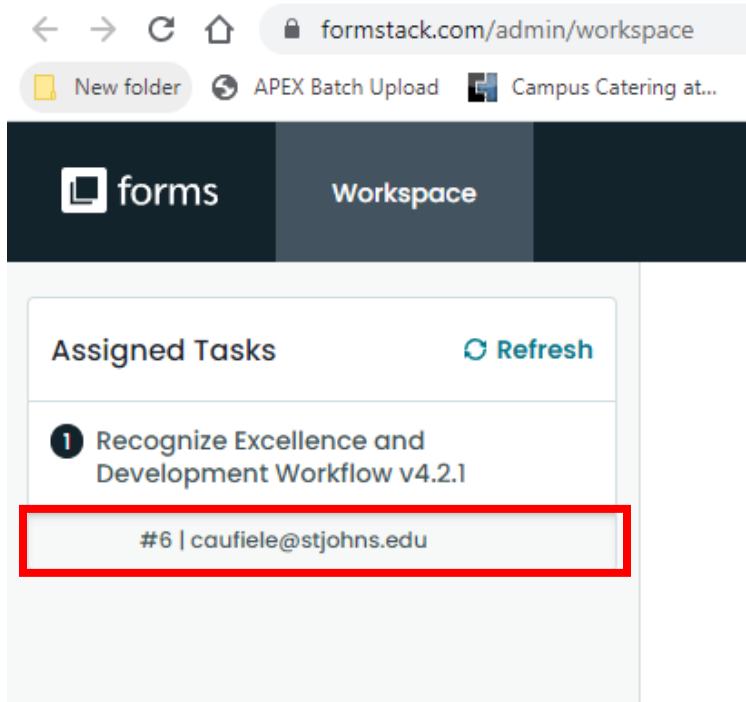
Assigned Tasks [Refresh](#)

- Recognize Excellence and Development Workflow v4.2.1**

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

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

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**.

### Terms of Service Agreement

Please click to open and read the Formstack [Formstack Privacy Policy](#), [Software Services Agreement](#), and [Acceptable Use Policy](#). This is required before you can proceed to your Formstack account.

Please note that if you have a specifically negotiated Master Services Agreement with Formstack, the executed Agreement shall prevail.

You have read and agree to all of the above

[Proceed to your account](#)

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

- The RED Form for the direct report is displayed on the screen. Click on **Open Form** (upper right of the screen).

The screenshot shows a web interface for a form. At the top, there is a navigation bar with 'forms' and 'Workspace' tabs. On the right, the user's name 'Lisa Goleick' is visible. Below the navigation bar, there is a header for 'Assigned Workflow 1 of 1' with a red box highlighting an 'Open Form' button. The main content area features the St. John's University logo and a 'WORKFLOW FORM' section titled 'Recognize Excellence and Development Workflow v4.0.1 (#6) > Step 2: Supervisor Assessment'. A prominent warning message reads: 'ATTENTION: You Cannot Save This Form'. Below this, there is a section for 'Recognize Excellence and Development (RED) Employee Information' with two icons: a red arrow pointing right labeled 'BEGINNING OF PERFORMANCE CYCLE' and a circular arrow with a checkmark labeled 'END OF PERFORMANCE CYCLE'.

- 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.**

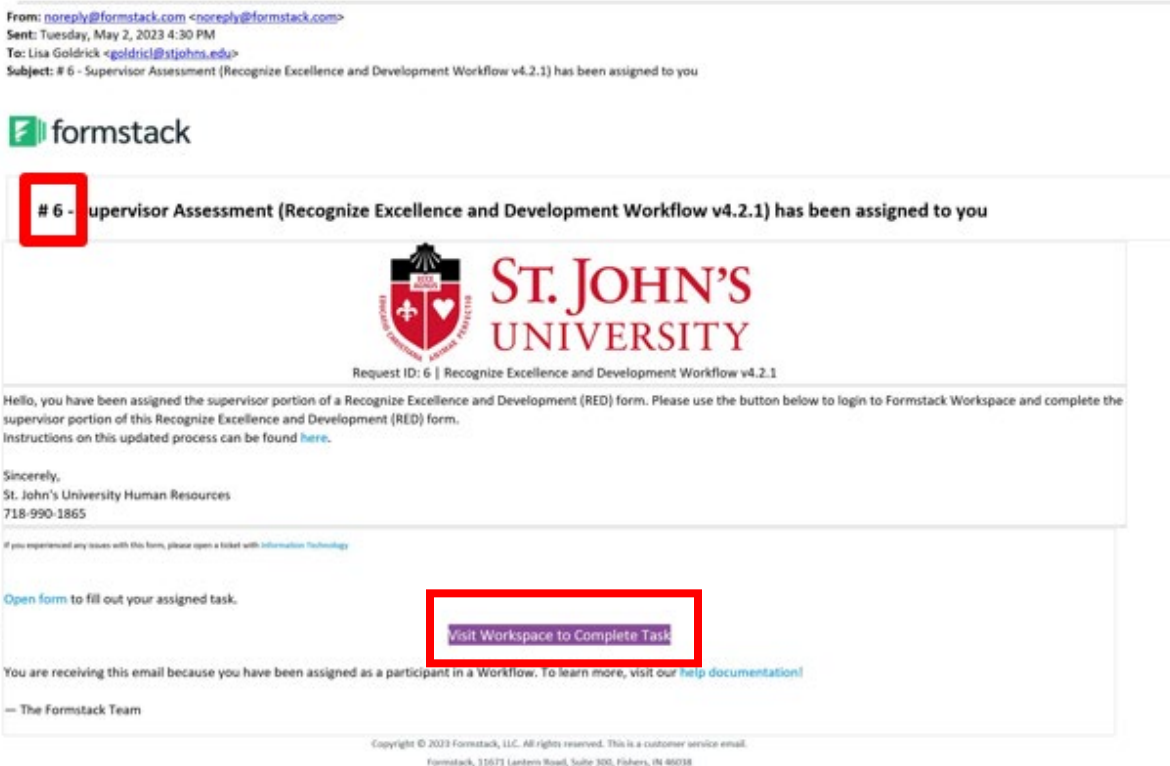
This screenshot shows a warning message: 'ATTENTION: You Cannot Save This Form'. Below the warning, there is a section for 'Recognize Excellence and Development (RED) Employee Information' with two icons: a red arrow pointing right labeled 'BEGINNING OF PERFORMANCE CYCLE' and a circular arrow with a checkmark labeled 'END OF PERFORMANCE CYCLE'. Below this, there is a section titled 'Please complete all information below:' with several input fields. The 'Employee's Name' field is split into 'First Name' (Eileen) and 'Last Name' (Caufield). The 'Employee's Title' field contains 'Associate Director, Training & Develo'. The 'St. John's University Employee Email' field contains 'caufiele@stjohns.edu'. The 'Employee X-Number' field is empty. The 'School or Department' field contains 'Human Resources Training & Develo'. The 'Periodic Check In Date' field is empty.

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

### 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**.

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

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**.

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

ST. JOHN'S UNIVERSITY

SMS

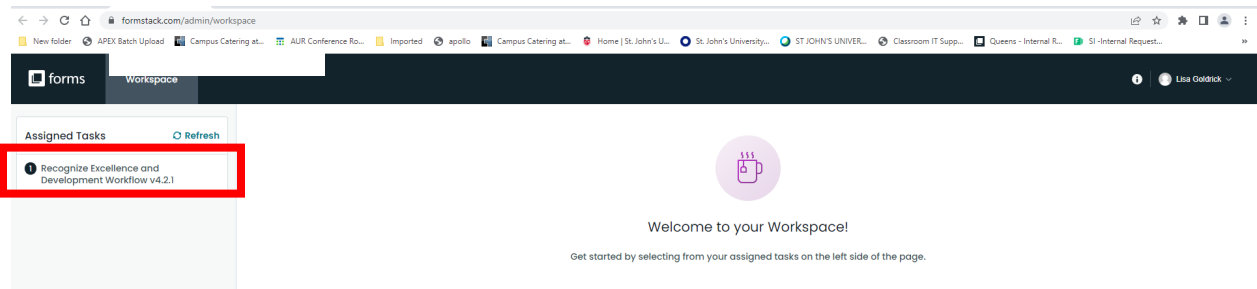
SMS Authentication  
(+1 XXX-XXX-6902)

Send code

**Verify**

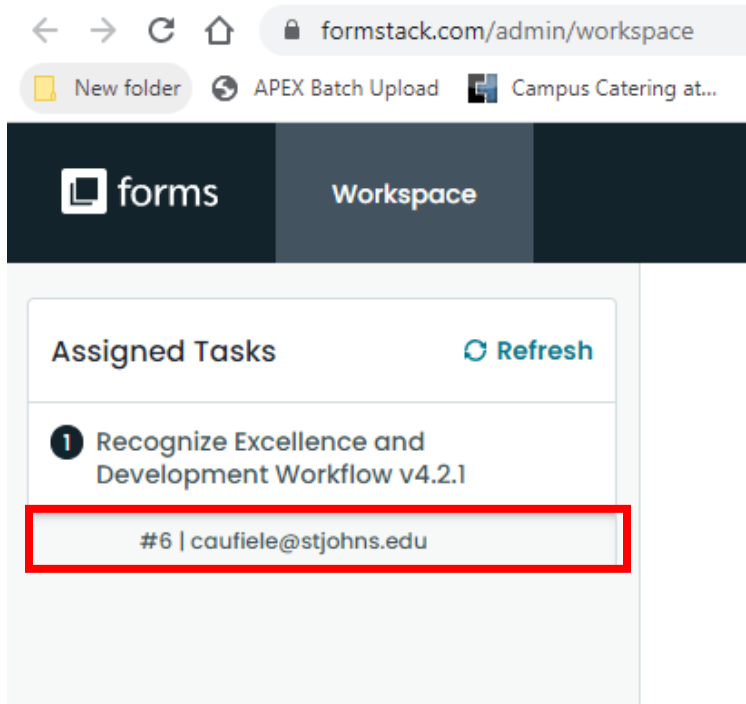
[Sign Out](#)

3. Click on **Recognize Excellence and Development Workflow v4.2.1** from the Formstack Workspace.



## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

- 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.



- Before you can access the employee's RED Form, you may be asked to accept Formstack's **Terms of Service**.
  - Check the box that states, "You have read and agree to all of the above."
  - Click on **Proceed to your account**.

### Terms of Service Agreement

Please click to open and read the Formstack [Formstack Privacy Policy](#), [Software Services Agreement](#), and [Acceptable Use Policy](#). This is required before you can proceed to your Formstack account.

Please note that if you have a specifically negotiated Master Services Agreement with Formstack, the executed Agreement shall prevail.

You have read and agree to all of the above

[Proceed to your account](#)

## RED Formstack #4 - Instructions for Supervisors to Access Direct Reports' RED Form in Formstack - 2023

- The RED Form for the direct report is displayed on the screen. Click on **Open Form** (upper right of the screen).

The screenshot shows a web interface for a performance form. At the top, there is a navigation bar with 'forms' and 'Workspace' tabs, and a user profile for 'Lisa Goleick'. Below the navigation bar, there is a header with the St. John's University logo and name. A sidebar on the left shows 'Assigned Tasks' with a 'Refresh' button and a task titled 'Recognize Excellence and Development Workflow v4.2.1' with the email '#6 | caufiele@stjohns.edu'. The main content area displays a 'WORKFLOW FORM' for 'Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 2: Supervisor Assessment'. A prominent red warning message states: 'ATTENTION: You Cannot Save This Form'. Below this, there is a section titled 'Recognize Excellence and Development (RED) Employee Information' with instructions to click on icons for 'BEGINNING OF PERFORMANCE CYCLE' (a red arrow) and 'END OF PERFORMANCE CYCLE' (a red circular arrow with a checkmark). In the top right corner, a blue button labeled 'Open Form' is highlighted with a red rectangular box.

- 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.**

This screenshot shows a warning message and a section for employee information. The warning message is: 'ATTENTION: You Cannot Save This Form'. Below it, there is a section titled 'Recognize Excellence and Development (RED) Employee Information' with instructions to click on icons for 'BEGINNING OF PERFORMANCE CYCLE' (a red arrow) and 'END OF PERFORMANCE CYCLE' (a red circular arrow with a checkmark). Below this section, there is a form with the following fields:

Please complete all information below:

Employee's Name *	Employee's Title *	St. John's University Employee Email *	Employee X-Number *
<input type="text" value="Eileen"/> <input type="text" value="Caufield"/>	<input type="text" value="Associate Director, Training &amp; Develo"/>	<input type="text" value="caufiele@stjohns.edu"/>	<input type="text" value=""/>
<small>First Name</small> <small>Last Name</small>			
School or Department *	Periodic Check In Date		
<input type="text" value="Human Resources Training &amp; Develo"/>	<input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>		