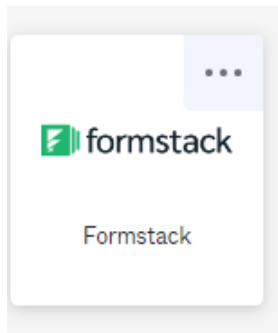


RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

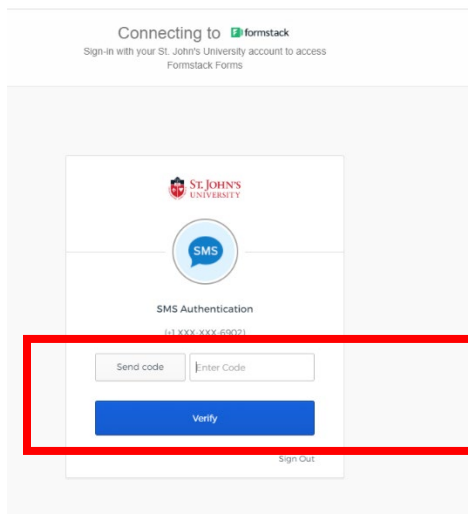
Supervisor Signature on the RED Form

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.

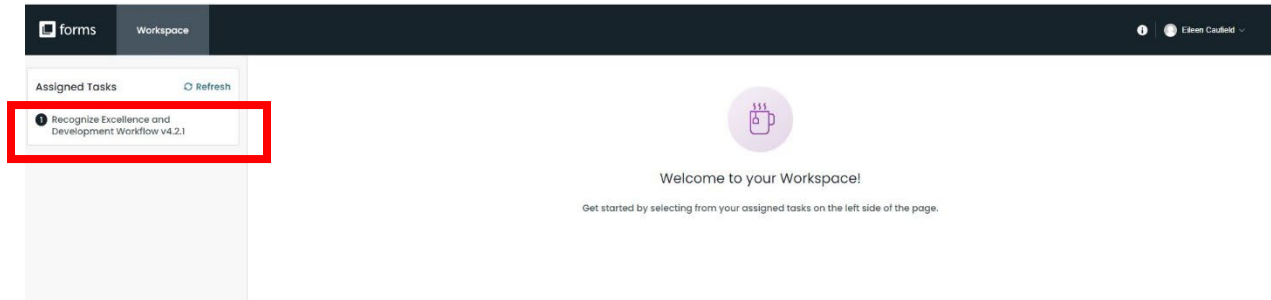


4. You may be asked to provide the two-factor authentication. Click on **Send code**, enter the code and click **Verify**. **Result:** You will be brought to the **Workspace**.

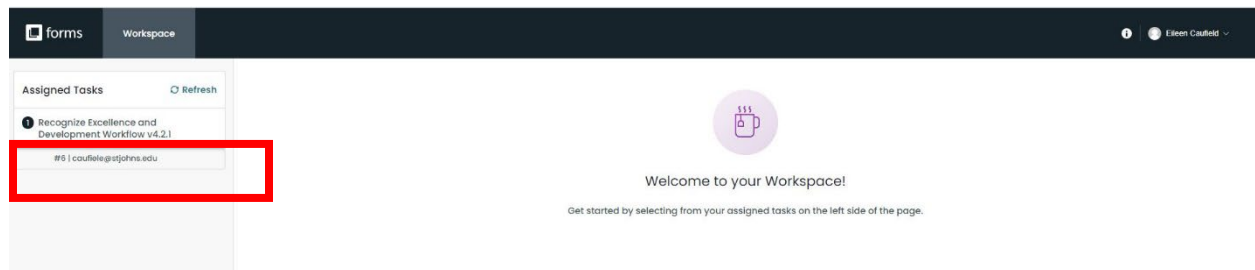


RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

5. Click on **Recognize Excellence and Development Workflow v4.2.1**



6. Click on the **Workflow #** that corresponds to the employee's RED Form you need to sign.



RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

- While on the screen that displays the employee's RED Form, click on **Open Form** to open the RED Form.

Forms Workspace

[Log Out](#) [Help](#)

Assigned Tasks
[Refresh](#)

Recognize Excellence and Development Workflow v4.2.1	1
#11100efg@stjohns.edu	

ST. JOHN'S UNIVERSITY

WORKFLOW CYCLE
 Recognize Excellence and Development Workflow v4.2.1 (v4) > Step 3:
 Performance Review Meeting

ATTENTION: You Cannot Save This Form

Please note that you cannot save your progress on this form. Once you leave or close the form, any unsaved information will be lost.

We encourage you to write and save your entries in a separate Word Document until you are ready to submit this form.

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.

BEGINNING OF PERFORMANCE CYCLE

END OF PERFORMANCE CYCLE

Please complete all information below:

Employee's Name*	Employee's Title*	St. John's University Employee Email*	Employee ID Number*
First Name: <input type="text"/>	Last Name: <input type="text"/>	Associate Director, Training & Dev't <input type="text"/>	200721016 <input type="text"/>


School or Department*

Periodic Check to Date

8. 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.

Recognize Excellence and Development (RED) Supervisor Signatures

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should **ONLY** be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Supervisor's Name *


First Name Last Name

Supervisor Completion Date *

05


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2023



Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

Submit Form

 Form secured by **Formstack**

9. Enter your **First Name, Last Name, Supervisor Completion Date** (date of the meeting with the employee, or date you are completing the form, if different).
10. Click on **Submit Form**.

RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

Result: You will receive confirmation that the form was submitted.



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Thank You


The form was submitted successfully.

RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

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 can access the Workspace through **Formstack**.

6 - Employee Signature (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you



formstack

6 - Employee Signature (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you



ST. JOHN'S
UNIVERSITY

Request ID: 6 | Recognize Excellence and Development Workflow v4.2.1

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 now 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!](#)

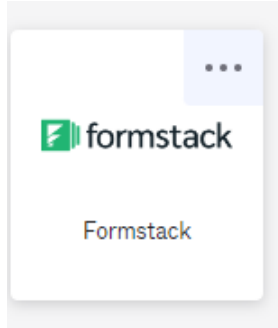
— The Formstack Team

Copyright © 2023 Formstack, LLC. All rights reserved. This is a customer service email.
Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038

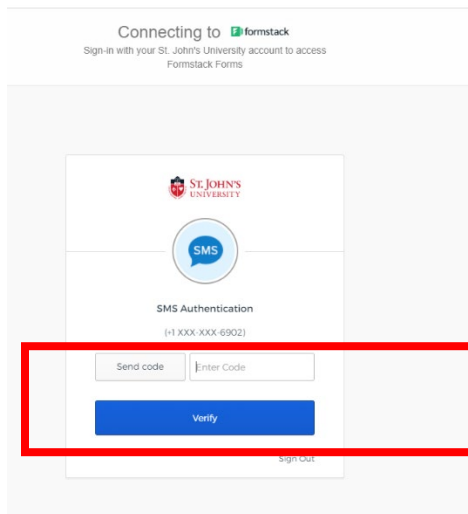
RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

Accessing the Workspace through Formstack.

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

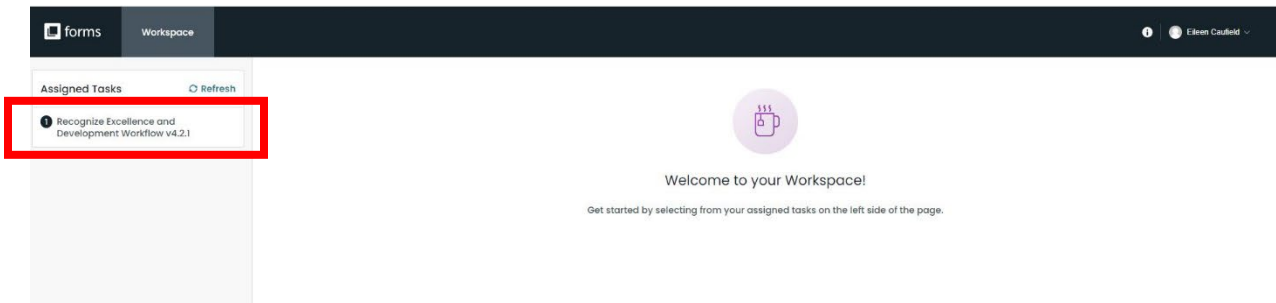


4. You may be asked to provide the two-factor authentication. Click on **Send code**, enter the code, and click **Verify**. **Result:** You will be brought to the Formstack **Workspace**.

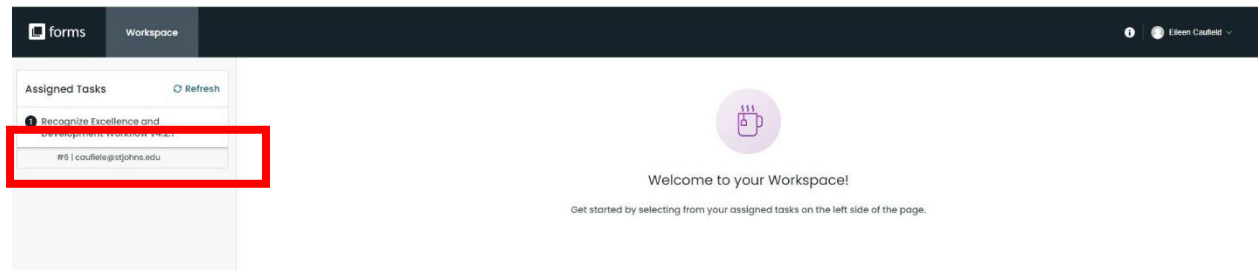


RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

- Click on **Recognize Excellence and Development Workflow v4.2.1**



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



- Before you can access your 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 #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

- When your RED Form is displayed on the screen, click on **Open Form** to open the RED Form.

<< < Assigned Workflow 1 of 1 > >>

[Open Form](#)



ST. JOHN'S UNIVERSITY

**WORKFLOW
FORM**


Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 4:
Employee Signature


ATTENTION: You Cannot Save This Form

Please note that you cannot save your progress on this form. Once you leave or close the form, any unsaved information will be lost.
We encourage you to write and save your entries in a separate Word Document until you are ready to submit this form.

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.


BEGINNING OF
PERFORMANCE CYCLE


END OF
PERFORMANCE CYCLE

RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

9. 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.

10a. 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**.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

Yes

Please enter your Recognize Excellence and Development (RED) comments *

I acknowledge that I have participated in this review process

Employee's Name *

Eileen

Caufield

Employee Completion Date *

05

09

2023

Submit Form

Form secured by Formstack

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

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RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

10b. 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**.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

No

I acknowledge that I have participated in this review process

Employee's Name *

Eileen

Caufield

First NameLast Name

Employee Completion Date *

05

09


2023

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

Submit Form

Form secured by Formstack

Result: You will receive confirmation that the form was submitted.

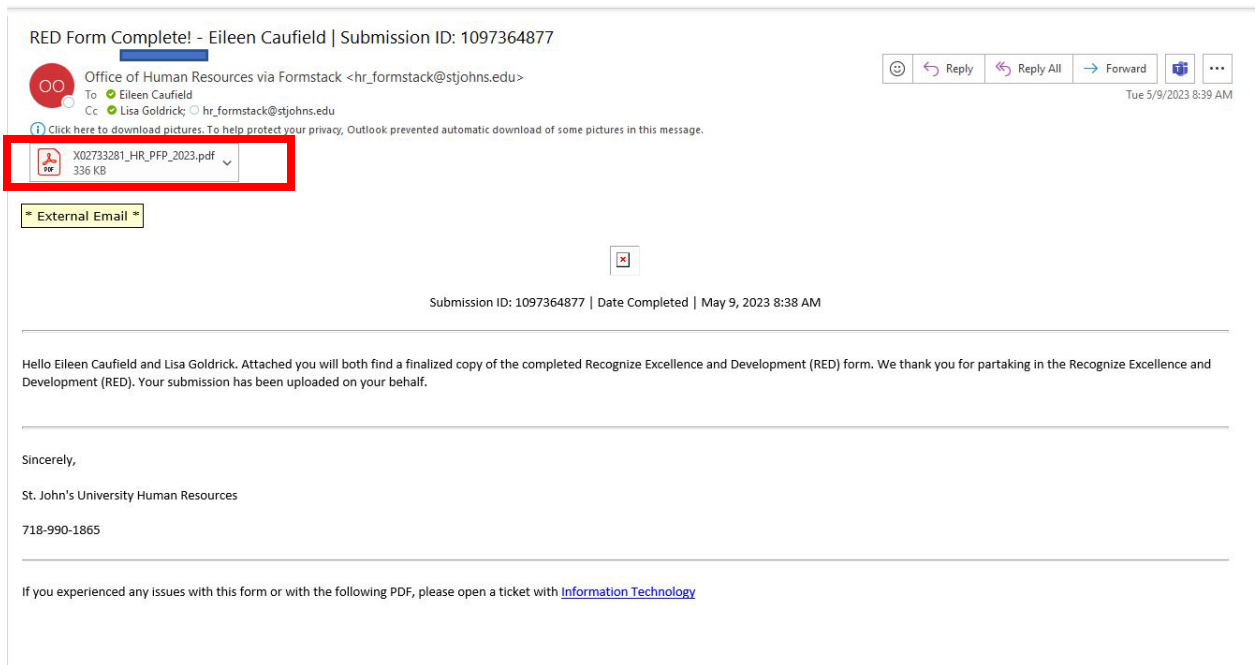


The image shows the St. John's University logo on the left, which includes a shield with a cross and the text "ST. JOHN'S UNIVERSITY". To the right of the logo, the text "ST. JOHN'S UNIVERSITY" is written in a large, red, serif font. Below this, there is a confirmation message in a light gray box. The message features a dark gray circle with a white checkmark inside, followed by the text "Thank You" and "The form was submitted successfully."

10

RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

11. 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. The final copy will not have the SAMPLE watermark featured on the document.



RED Formstack #8 - Instructions for Signing the Direct Reports' RED Form in Formstack - 2023

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

**Recognize Excellence and Development
(RED)**

Revised 8/4/2022

Employee's Name: [REDACTED] Supervisor's Name: [REDACTED]
Title: [REDACTED] Title: [REDACTED]
Email: [REDACTED] Email: [REDACTED]
Xnumber: [REDACTED] Xnumber: [REDACTED]

School or Department: Human Resources
Periodic Check in Date: Final Assessment Date: 09/20/2022

Objectives/Key Responsibilities – 60% overall weighting

Objectives	Rating/Weight
#1 Objective/Key Responsibility: Design and Delivery of Training Programs - Continue to deliver to the University Community ongoing training and development workshops in both in-person and webinar formats throughout the year with the goal of achieving overall evaluation ratings of 90% very good/excellent.	EP Weighting: 50%
#2 Objective/Key Responsibility: Training Administration - On a weekly basis, download the online Canvas completion results for the mandatory training programs (annual discrimination for adjuncts, affiliates, full-time faculty and GAS and student workers; Active Shooter for all adjuncts, Emergency Readiness for adjuncts and full-time faculty, Title IX for adjuncts) and the SASO training of Case Security Training, Recertification Training and Fit Training on behalf of Information Technology and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs.	EP Weighting: 15%
#3 Objective/Key Responsibility: Strategic Planning and People Management - Manage the training budget to ensure program needs are met; identify a way to convert the section's paper files to a digital format for implementation in FY 2023.	EP Weighting: 10%
#4 Objective/Key Responsibility: Diversity, Equity & Inclusion - participate in the Academic Center for Equity & Inclusion's Inclusive Teaching Institute, conduct monthly discussion sessions for the Equity & Inclusion Cohort members pursuing the Equity & Inclusion Certificate during the winter and spring of 2023.	EP Weighting: 15%
#5 Objective/Key Responsibility: Custom Training Facilitation - facilitate customized training workshops as requested.	EP Weighting: 10%
	100%

OVERALL YEAR-END RATING SCALE: OBJECTIVES & KEY RESPONSIBILITIES: EP

Competencies – 40% overall weighting

Competencies	Rating
1. Provide Timely and Excellent Service:	EP
2. Diversity and Inclusion:	EP
3. Shared Ownership/Accountability:	EP
4. Adapting to Change:	EP
5. Collegiality and Teamwork:	EP
6. Communication:	EP
7. Quality of Work:	EP

SUPERVISOR'S ONLY

8. People Management:	EP
9. Planning and Strategic Vision:	PV+

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13. Human Resources will upload all the employee ratings into Banner. Supervisors do not need to enter ratings into UIS.