# CCRI

2024 Annual Performance Review

Instructions for Supervisors and
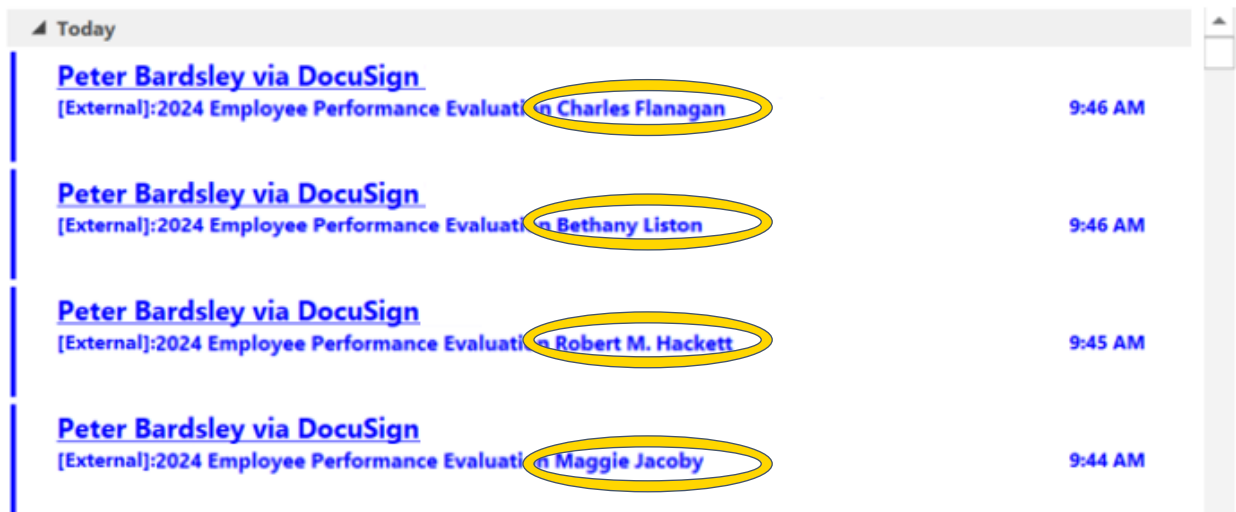
Employees

# Table of Contents

## Completing the annual employee evaluation (Supervisor)

CCRI is conducting the Annual Employee Performance Review Process using DocuSign.

On March 18, 2024, supervisors of all full-time employees will receive individual emails for each employee with a link to access their evaluation form in DocuSign. Deadlines must be adhered to:

- Evaluations of PSA union members must be completed by supervisors and employees, and received by HR, no later than Wednesday, July 31, 2024.
- Evaluations of ESPA union members and Board of Education (BOE) employees must be completed by supervisors and employees, and received by HR, no later than Friday, August 30, 2024.

Supervisors are expected to plan accordingly and monitor status. Supervisors are able to complete the evaluation form individually via their email inbox, as they desire.



However, you may wish to access a Dashboard within DocuSign that will allow you to organize and manage your work, set priorities, etc...To access your DocuSign dashboard head to MyCCRI.

Click on the "For Employees tab.

Click on "DocuSign."
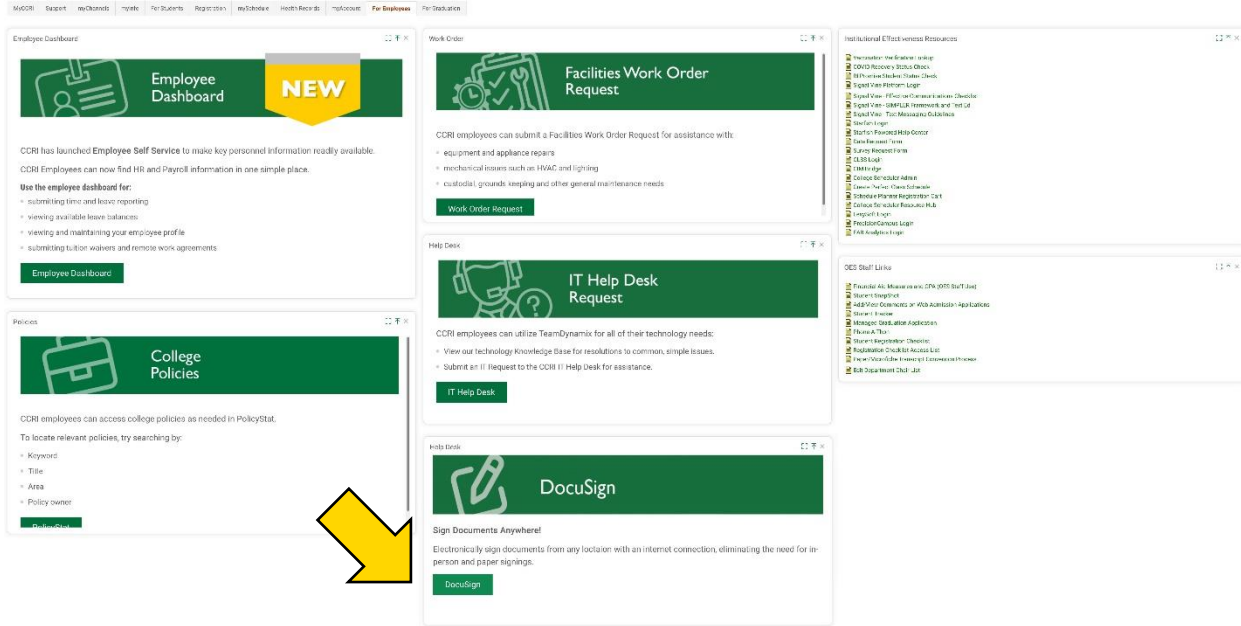
You will be taken to DocuSign's dashboard and be able to access items under the following categories"

1. Action Required – Items awaiting your review and signature
2. Waiting for Others – Items you either sent, or completed that are now awaiting action from another party within a review queue.
3. Expiring Soon – Items that will expire after a predetermined timeframe.
4. Completed – Items that you either sent or completed that have also completed their steps within a review queue.

Click on "Action Required," you will be taken to the items awaiting your review and signature.
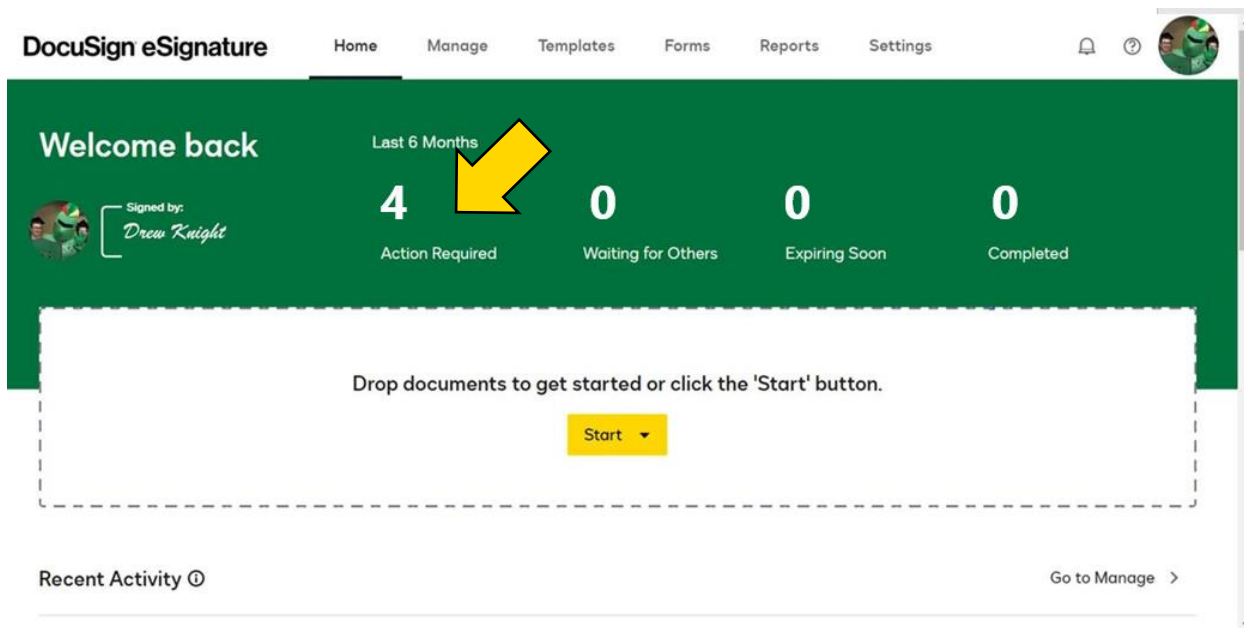
Once inside, you can decide how to organize your work. Its highly recommended that you schedule time on your calendar for you to meet with your employee's and to perform the evaluation with them. This will help set you up for success.



When you're ready to fill out an evaluation form, click "Sign" on the right side of the corresponding employee. Please note that you cannot move to complete an evaluation form until you have checked the box for "I agree to use electronic records and signatures" and click "Continue" once it is highlighted.



Upon entry, you'll see the name of the employee you're evaluating pre-loaded into the document. To successfully submit a performance evaluation, you must enter their Banner ID accurately. Supervisors may find the Banner IDs of their direct reports by clicking on "My Team," in the employee dashboard. Each employee's banner ID appears beneath their name. You may copy and paste it into the Employee Banner ID field in the evaluation. To make this easier, a link is included in the evaluation, that will take you to the Employee Dashboard.
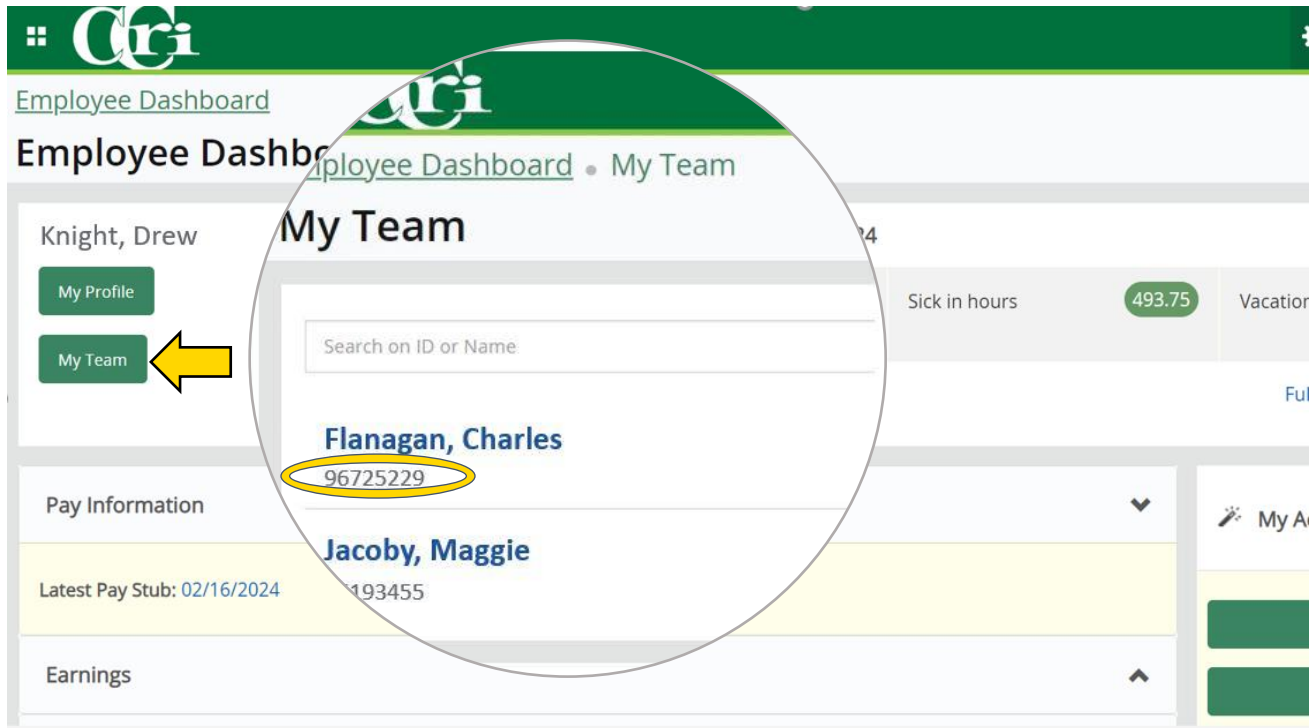
Note: The Annual Review button is already selected, there is no need to adjust this.

Employees should be rated appropriately in each of the categories and relevant comments added. If an employee is rated a 3 in any category, supervisors are encouraged to provide relevant positive feedback. Some form of comment is required in every field.

In the event you need to stop writing the evaluation and return to it later, you can save your work without losing progress.

To do so, in the upper right corner, click "Other Actions" and select "Finish Later."

You will be prompted to begin another document if there are additional items to review in your queue. You may opt to do so by clicking "Sign" or you may choose not to by clicking "No Thanks" and you'll be taken back to the queue of items requiring your action.

You can return and pick up where you left off at a later time.

Any employee who receives an overall rating of 2 or less, should have the opportunity to an interim follow-up review and it should be scheduled at the time of the evaluation.

Once you have completed the written evaluation, you must sign and enter your Banner ID accurately. You may find your Banner ID on the employee Dashboard by clicking on "My Profile" where it appears below your name on the left side.



Upon clicking "Finish" your employee will receive their evaluation to review, make comments if desired, and sign. You will be prompted to begin another document if there are additional items to review in your queue. You may opt to do so by clicking "Sign" or you may choose not to by clicking "No Thanks" and you'll be taken back to the queue of items requiring your action.

In the DocuSign Dashboard, supervisors can click on "Waiting for Others" to see which employee's have yet to complete their evaluations.
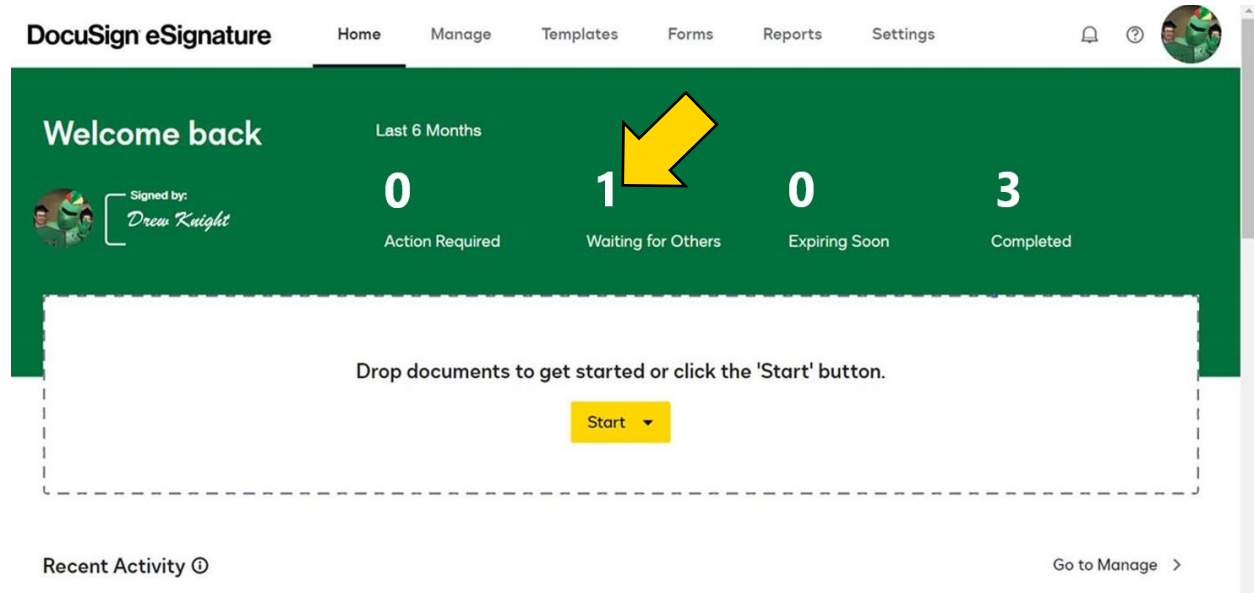


Once inside, clicking on the "Waiting for Others" link will open a box indicating whose review and signature is required to complete the evaluation. Supervisors are asked to assist in timely completion by reminding their employees to complete the evaluation according to required timing.
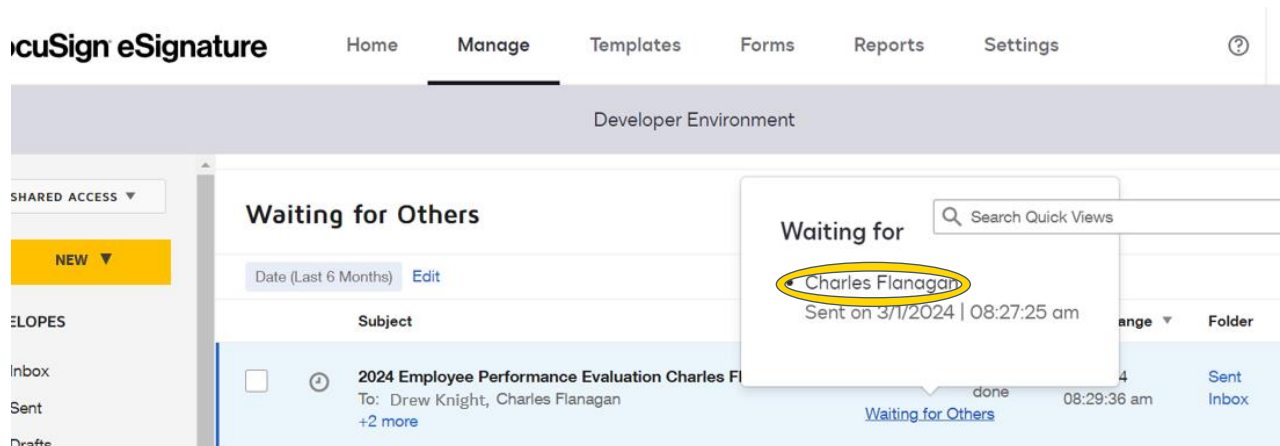
## Completing the annual employee evaluation (Employee)

After supervisors sign and finish their employees' evalutaions, they will immediately route to the employee who will receive an email. Deadlines must be adhered to:

- Evaluations of PSA union members must be completed by supervisors and employees, and received by HR, no later than Wednesday, July 31, 2024.
- Evaluations of ESPA union members and Board of Education (BOE) employees must be completed by supervisors and employees, and received by HR, no later than Friday, August 30, 2024.

Employees are able to complete their evaluation form via their email inbox, as desired.



However, you may wish to access a Dashboard within DocuSign that will allow you to organize and manage your work. To access your DocuSign dashboard head to MyCCRI.
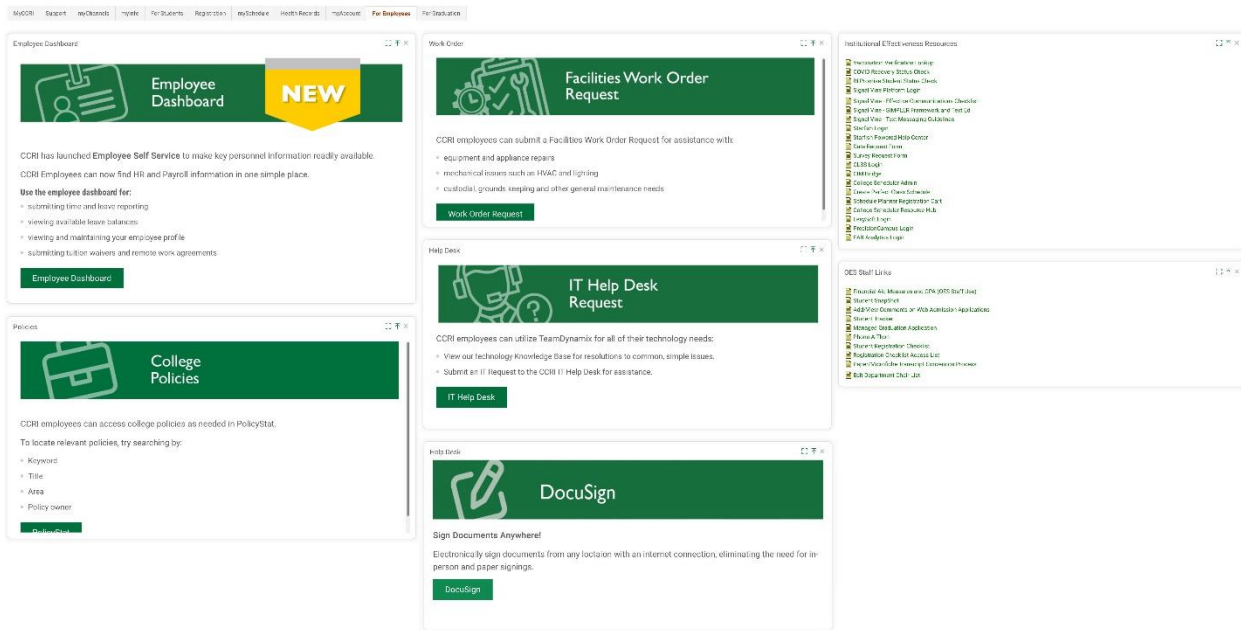
Click on the "For Employees" tab.



You will be taken to DocuSign's dashboard and be able to access items under the following categories"

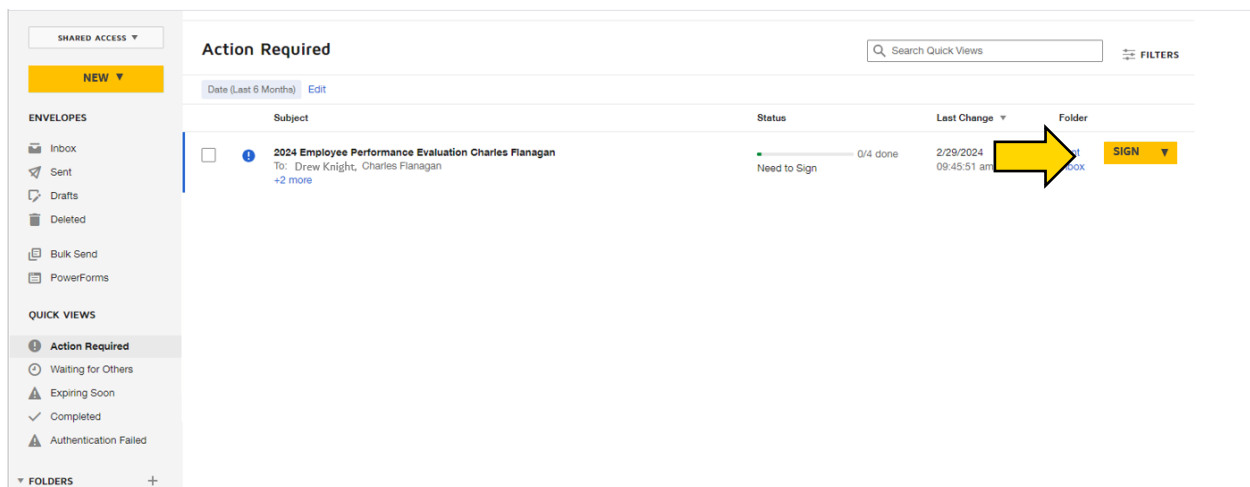1. Action Required – Items awaiting your review and signature

2. Waiting for Others – Items you either sent, or completed that are now awaiting action from another party within a review queue.
3. Expiring Soon – Items that will expire after a predetermined timeframe.
4. Completed – Items that you either sent or completed that have also completed their steps within a review queue.

Click on "Action Required," you will be taken to the items awaiting your review and signature including your performance evaluation (if completed by your supervisor).
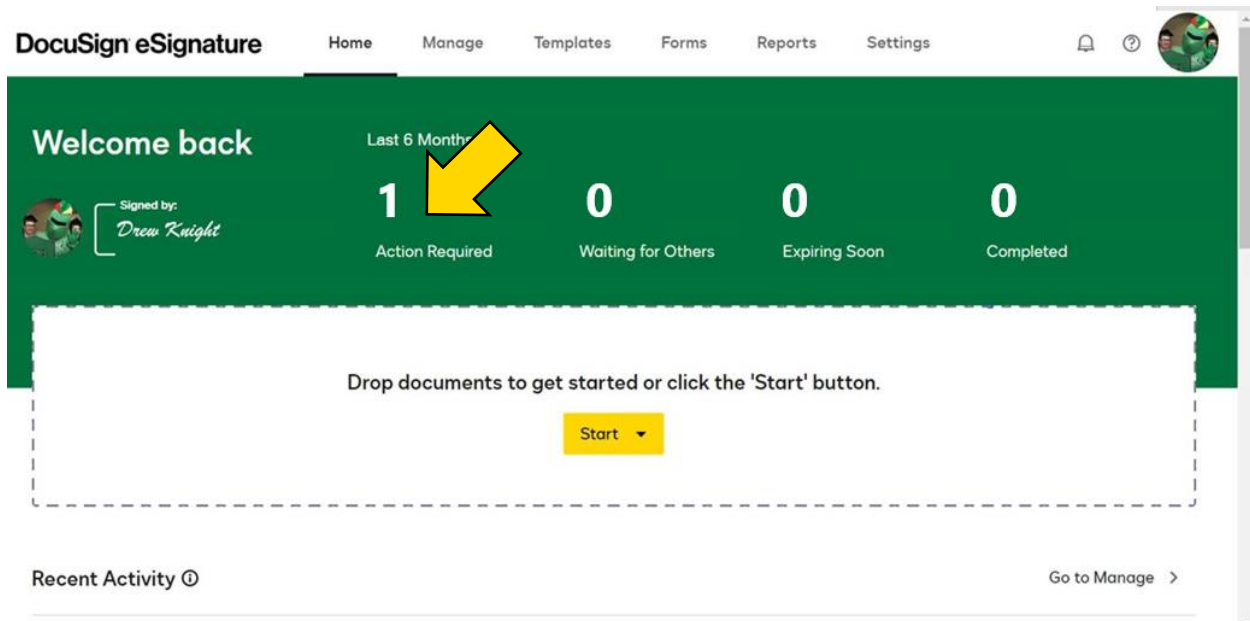


When you're ready to review and sign your evaluation form, click "Sign" on the right side of the corresponding document.

Please note that you cannot move to complete an evaluation form until you have checked the box for "I agree to use electronic records and signatures" and click "Continue" once it is highlighted.



Review the feedback provided by your supervisor and consider your own reflection of your work over the past year. Comments may be added and you must sign and click "Finish" to complete your evaluation.