

PERFORMANCE EXCELLENCE FORMS ELECTRONIC SIGNATURE JOB AID

Supervisor: Complete, Digitally Sign and Email the Form

Important

- Download the Performance Excellence form and save it to your computer.
- Open the PDF using Adobe Acrobat Reader or Adobe Acrobat. Do not use a web browser PDF viewer.
- Both the supervisor and employee must open the PDF in Adobe to add comments and apply digital signatures.
- Use the digital signature fields provided in the form. DO NOT use the “Fill & Sign” tool in Adobe, as it may prevent the employee from being able to add to the “Employee Comments” section as part of their review.

1. Open the form

Opening the form in Adobe rather than a browser view will ensure full access to the e-signature functionality. Select the desired form on the Performance Excellence site, click on the link and download the form to your computer. After saving, navigate to the file name, right click and open with Adobe Acrobat Reader or Adobe Acrobat.

2. Complete the form

Enter the required performance information and review it for accuracy.

3. Sign the form as the supervisor

Click your assigned signature field and add your signature by double clicking on the field, select the appropriate digital signature*, click “continue”, then click “sign”.

**NOTE—if you do not have an existing digital ID, you will be prompted to create one. Please refer to “First Time Using a Digital ID” included at the end of this guide.*

4. Save a version of the form with your signature.

You will be prompted to save a version of the form with your signature.

5. Enter the date the review was completed.

After saving, enter the date the review was completed.

6. Email the form to the employee for their signature.

Attach the signed PDF to an email. Instruct the employee to save the attachment, open it in Adobe Acrobat Reader or Acrobat, review the form, add comments if desired, apply their own digital signature, save the PDF, and reply with the completed form attached. Attach the instructions below for reference if desired.

7. Complete routing.

After receiving the signed and completed form from the employee, follow your college or MAU process for routing.

Employee: Review, Comment, Digitally Sign and Return the Form

1. Open the email from your supervisor containing the Performance Excellence form.

Save the attached PDF to your computer and open it using Adobe Acrobat Reader or Adobe Acrobat. (Right click on the file, click “open with”, select Adobe Acrobat Reader or Adobe Acrobat)

2. Review the form.

Read the desired form and confirm that the information is accurate. Add “employee comments” if desired. DO NOT edit any other content on the form. If you would like edits to be made, please contact your supervisor.

3. Sign the form.

Double click the employee signature field located at the bottom of the form. Select the appropriate Digital Signature, click “continue”, then click “sign”. If you do not have a Digital ID created, refer to “First Time Using a Digital ID” instructions included below.

5. Enter the review date.

Enter the date the review was completed.

6. Return the form.

Return the signed form to your supervisor via email.

First Time Using a Digital ID

If you have never created a Digital ID, Adobe will prompt you to configure one when you double click on the supervisor signature field.

1. Configure a new Digital ID

Select “Configure New Digital ID”.

2. Create a new Digital ID

Select “Create a new Digital ID”, then select “Continue”.

3. Select where to store the Digital ID

Select “Save to File”, then select “Continue”.

4. Enter your identity information

Enter the requested identity information, then select “Continue”.

5. Create a password

Create and confirm a password for the Digital ID, then select “Save”. Save your password in a safe location as you may be prompted to enter the password each time you add a Digital ID to a document.

6. Select the Digital ID

Select the Digital ID you created, then select “Continue”.

7. Sign the form

Enter the Digital ID password and select “Sign”. You will be prompted to save a version of the form with your signature.

Troubleshooting and Frequently Asked Questions

Why do I not see the signature tools?

The form is likely open in a browser PDF viewer. Download it and open it in Adobe Acrobat Reader or Adobe Acrobat.

Do I need an Adobe account to utilize the Digital ID function?

Generally, no. A Digital ID is created and stored directly in the desktop application without requiring users to create an account or sign into an Adobe account.

How is the form shared?

The supervisor completes the form, digitally signs, emails the PDF to the employee and the employee returns to the supervisor via email.

What happens after both people sign?

The form is no longer able to be edited. Follow your college or MAU process for routing the completed Performance Excellence form.

Can I print and sign and then scan the form?

Yes. However, we encourage use of digital signatures whenever possible.

I got a new computer and I am being prompted to create a new Digital ID. Why?

Adobe stores the Digital ID on your computer and unless it is intentionally copied as part of the transition to your new computer, you will be asked to create a new one. See the instructions "First Time Using a Digital ID".