

# Supervisor Instructions for HEO Evaluations

This is how the evaluation document appears at the bottom of the page after you complete evaluating the employee.

## STEP 1:

Save and print to review.

### G. Overall Performance Rating

Click to choose a circle below that describes the employee's overall performance rating.

**Unsatisfactory**

Work performance is inadequate and inferior to the standards of performance required for the position. Performance at this level cannot be allowed to continue.

**Needs Improvement**

Work performance does not consistently meet the standards of performance for the position. Serious effort needed to improve performance.

**Satisfactory**

Work performance consistently meets the standards of performance for the position.

**Surpasses Expectations**

Work performance is consistently superior to the standards required for the position.



Save & Print

Submit to HR & Print

Cancel

## STEP 2:

To sign the evaluation document you must click "Submit to HR & Print."

To sign this form, you must first submit this 'Temporary' draft [online](#).

Go to 'Evaluations', select the employee, locate the evaluation and then click on the employee's name to open it. At the bottom of the form, click 'Submit to HR & Print'.

f. TEST, ANNIE ASSISTANT TO HEO HUMAN RESOURCES SURPASSES EXPECTATIONS 02/2019 to 02/2020 PENA, ANNIE TEMPORARY 11/11/2020

Save & Print

Submit to HR & Print

Cancel



### STEP 3:

Once the evaluation document is submitted to HR, click “Print” to convert the document into PDF.



## Evaluation Memorandum HEO Series



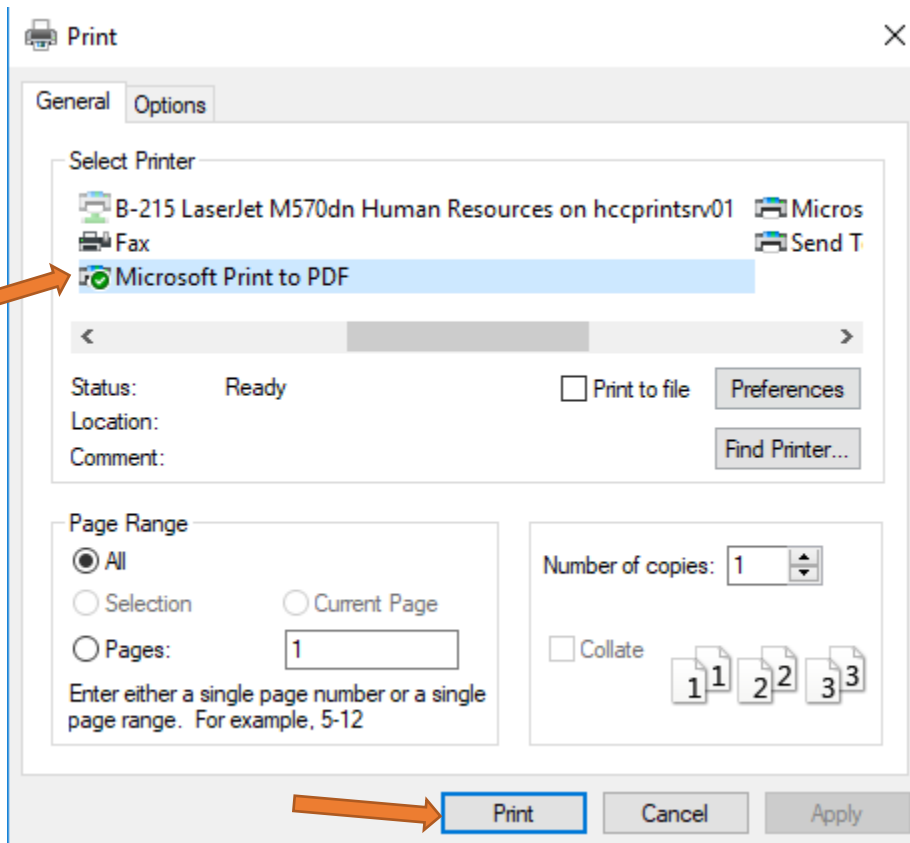
Employee Name  
**TEST, ANNIE**  
Contract Title  
**ASSISTANT TO HEO**  
Functional Title

Department  
**HUMAN RESOURCES**  
Date of Initial Appt to College  
**12/1/2015**  
Date of Appt to Current Position  
**12/1/2015**

Division  
**ADMINISTRATION & FINANCE**  
Period of Evaluation  
From: **02/2019** To: **02/2020**

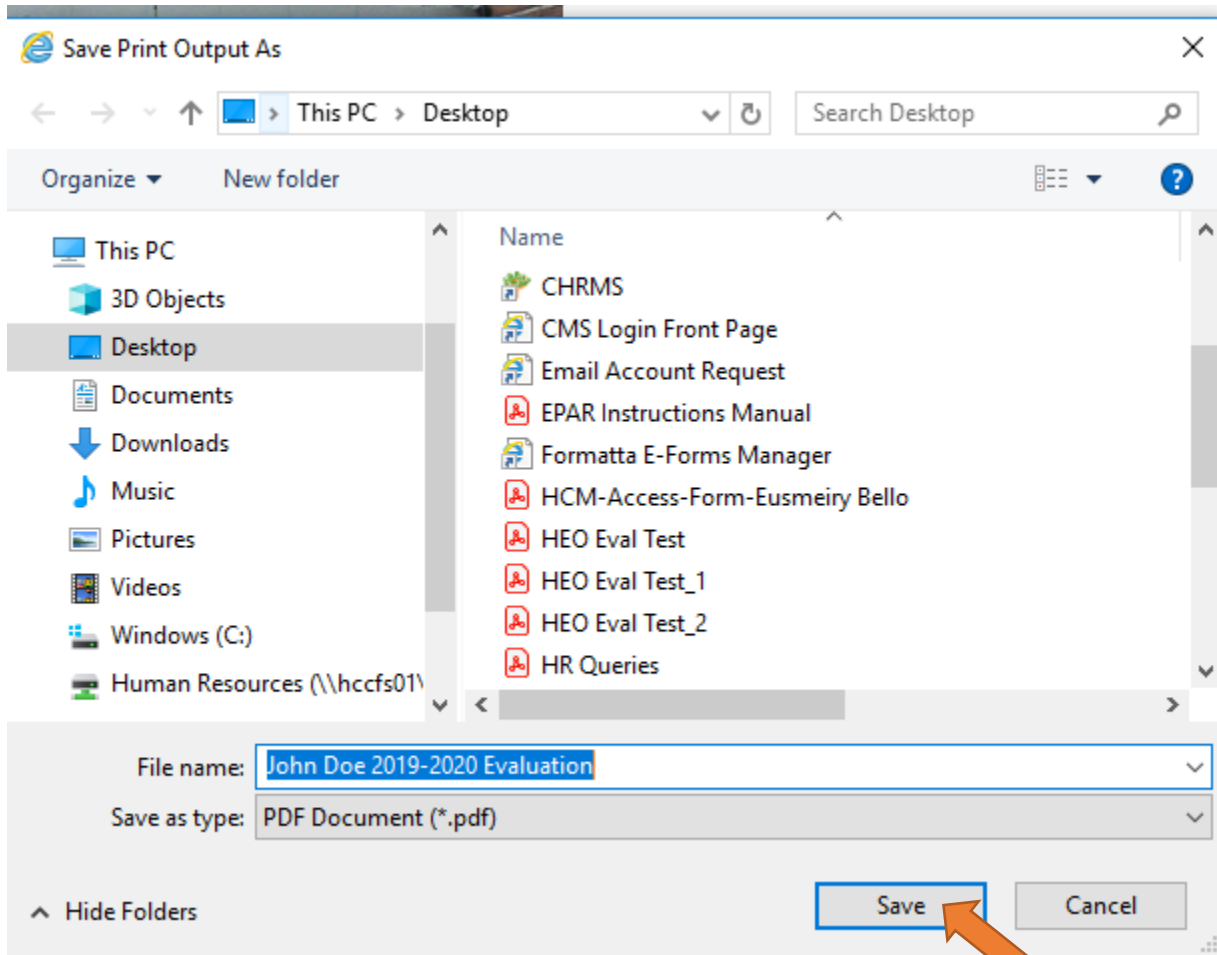
### STEP 4:

Please select the option of “Print to PDF” instead of sending to a printer. Then click “Print” at the bottom.



## STEP 5:

Name the evaluation document and save it into your computer-preferred folder.



## STEP 6:

To enable electronic signature, supervisors will find the previously "printed" pdf of the evaluation in their files, right-click the document and select "Edit with Adobe Acrobat."

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

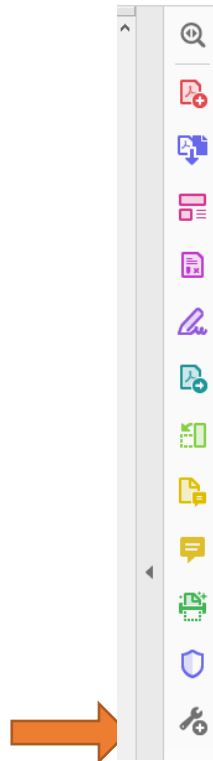
Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Please sign to acknowledge receipt of this memorandum. Please return the original signed copy to your supervisor within one week of receipt and keep a copy for your records. Your signature indicates that you have received a copy of this memorandum and does not signify that you agree with the appraisal or its contents. You may attach any comments you desire.*

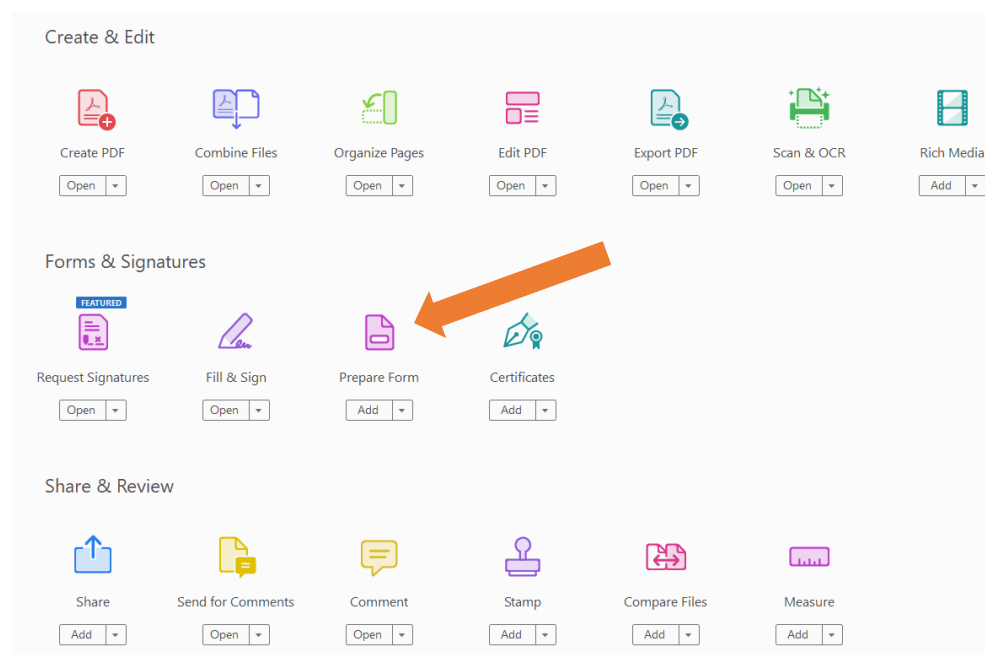
*This document along with attachment if any will be placed in your personnel file.*

**STEP 7: (You need Adobe Acrobat Pro DC to perform this step. If you do not have Adobe Acrobat Pro/DC on your campus computer, please contact the IT Service Desk via [itjobrequest@hostos.cuny.edu](mailto:itjobrequest@hostos.cuny.edu)).**

Once the evaluation document is open, click on “Tools” to the right hand side of the screen.

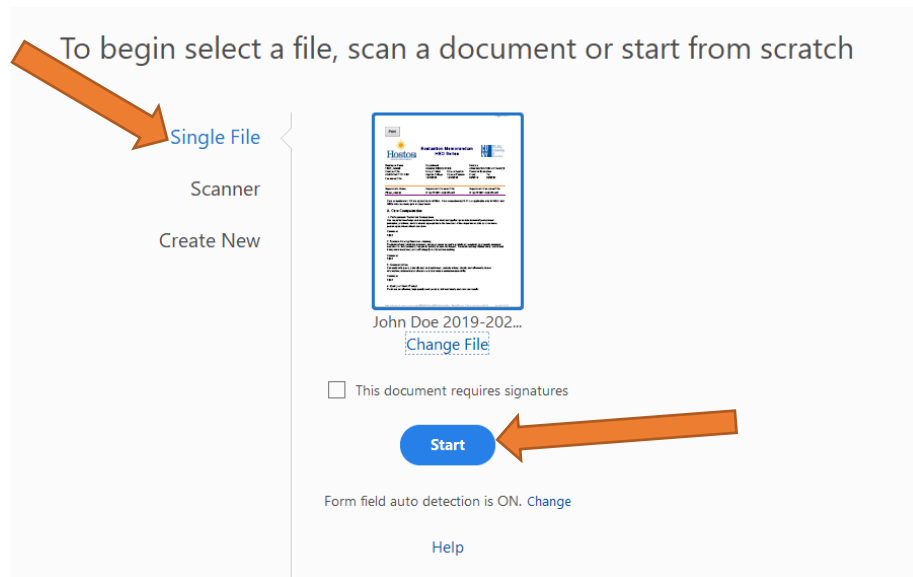


**And then select “Prepare Form.”**



## STEP 8:

Once the screenshot below pops up, click on “Single File” (see below) and then click “Start.”



Once you click “Start”, the signature field will be populated and ready for signature.

Click on the “Supervisor Signature” to add your digital signature.

Supervisor Signature:	<input type="text" value="Supervisor Signature"/>	Date:	<input type="text" value="Date"/>
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Employee Signature:	<input type="text" value="Employee Signature"/>	Date:	<input type="text" value="Date_2"/>
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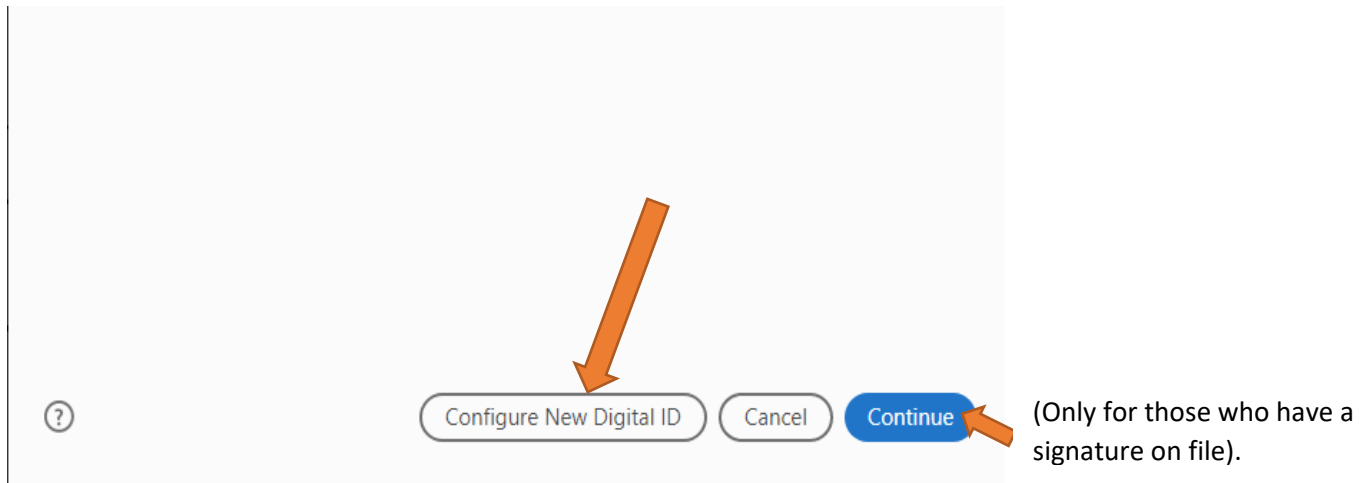
*Please sign to acknowledge receipt of this memorandum. Please return the original signed copy to your supervisor within one week of receipt and keep a copy for your records. Your signature indicates that you have received a copy of this memorandum and does not signify that you agree with the appraisal or its contents. You may attach any comments you desire.*

*This document along with attachment if any will be placed in your personnel file.*

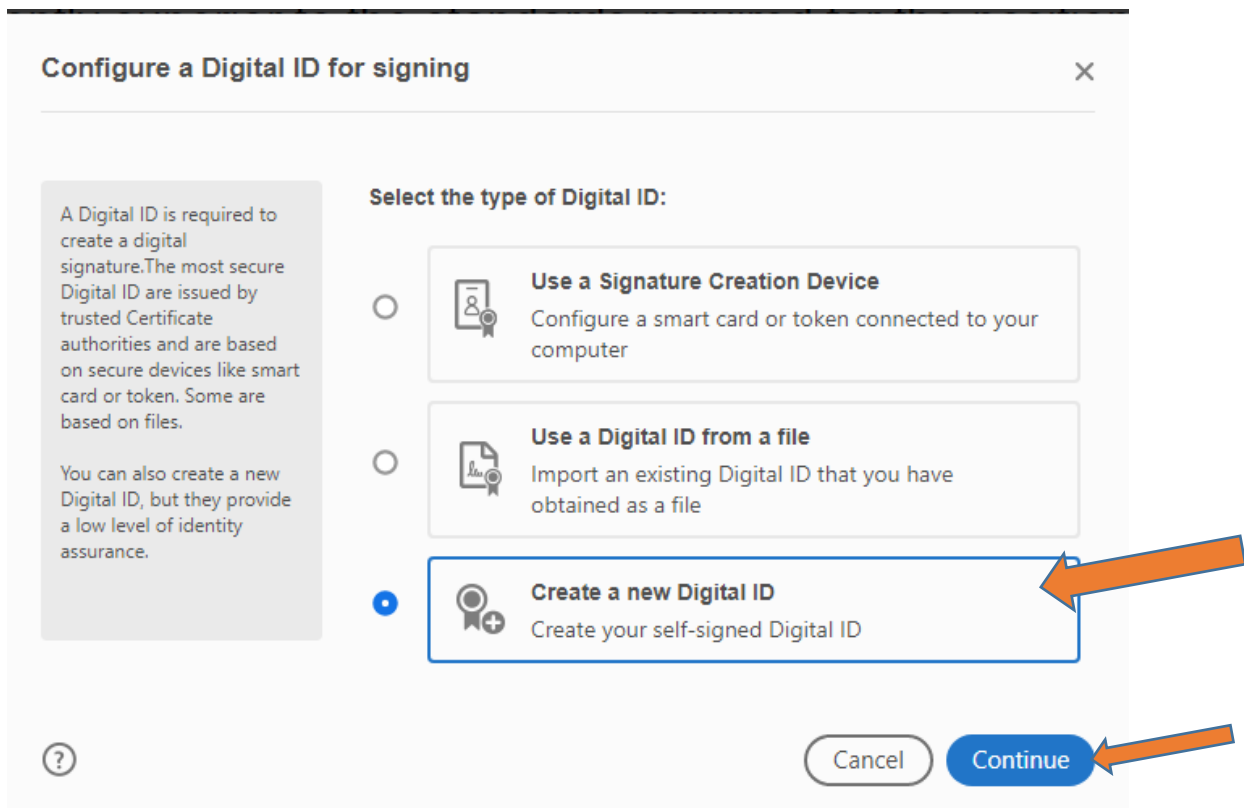
## STEP 9:

To create a digital signature:

- Click on the Signature line for Supervisor and click on “Configure New Digital ID” to add the signature.
- If you already have a digital signature, click “Continue” and proceed to Step 12.



To create the new Digital ID/Signature, select “Create a new Digital ID” and then click “Continue.”



## STEP 10:

Click on “Save to Windows Certificate Store” and then click “Continue.”

The dialog box is titled "Select the destination of the new Digital ID" and has a close button (X) in the top right corner. On the left, there is a grey box with text explaining Digital IDs and a note to consult with recipients. On the right, there are two radio button options: "Save to File" (unselected) and "Save to Windows Certificate Store" (selected). Below the options are "Back" and "Continue" buttons. An orange arrow points to the "Save to Windows Certificate Store" option, and another orange arrow points to the "Continue" button.

## STEP 11:

Fill out the Name and Email Address fields and then click “Save.”

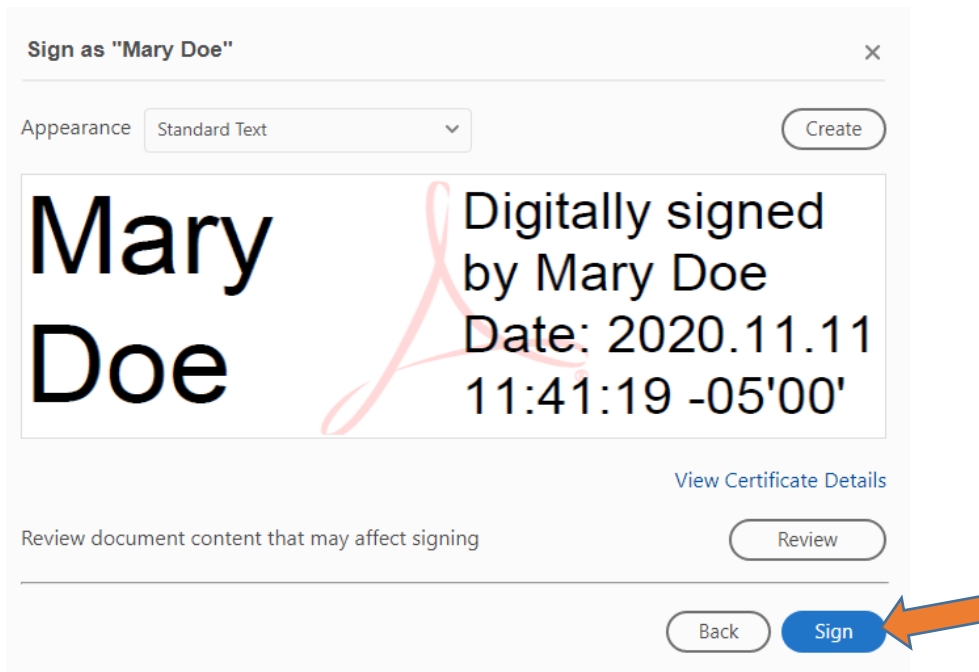
The dialog box is titled "Create a self-signed Digital ID" and has a close button (X) in the top right corner. On the left, there is a grey box with text explaining self-signed Digital IDs. On the right, there are several input fields: "Name" (filled with "Mary Doe"), "Organizational Unit" (placeholder "Enter Organizational Unit..."), "Organization Name" (placeholder "Enter Organization Name..."), "Email Address" (filled with "test@hostos.cuny.edu"), "Country/Region" (dropdown menu showing "US - UNITED STATES"), "Key Algorithm" (dropdown menu showing "2048-bit RSA"), and "Use Digital ID for" (dropdown menu showing "Digital Signatures"). Below the fields are "Back" and "Save" buttons. An orange arrow points to the "Name" field, another orange arrow points to the "Email Address" field, and a third orange arrow points to the "Save" button.

Once you click “Save”, your digital signature will be created as shown below. Click “Continue.”

The dialog box is titled "Sign with a Digital ID" and has a close button (X) in the top right corner. It contains a "Refresh" button and a list of Digital IDs. The first item in the list is "Mary Doe (Windows Digital ID)" with a "View Details" link. Below the list are "Configure New Digital ID", "Cancel", and "Continue" buttons. An orange arrow points to the "Continue" button.

## STEP 12:

Click "Sign."



The screenshot shows a digital signing window titled "Sign as 'Mary Doe'". At the top right is a close button (X). Below the title is an "Appearance" dropdown menu set to "Standard Text" and a "Create" button. The main area displays the name "Mary Doe" in large black font on the left. To the right, a pink digital signature is overlaid on the text "Digitally signed by Mary Doe" and "Date: 2020.11.11 11:41:19 -05'00'". Below this is a "View Certificate Details" link. At the bottom, there is a "Review document content that may affect signing" section with a "Review" button. At the very bottom are "Back" and "Sign" buttons, with an orange arrow pointing to the "Sign" button.

## STEP 13:

Save the evaluation document, and then email the evaluation as an attachment to the employee for signature. Attach Employee Instructions pdf to the e-mail and advise the employee to sign in acknowledgement of receipt of the document and return by the end of the day or at the very latest, within a week.

## STEP 14:

Once received back from employee, forward the signed evaluation to Human Resources ([ndisla@hostos.cuny.edu](mailto:ndisla@hostos.cuny.edu)).