Georgia Tech | Human Resources

DocuSign Instructions for
GTHR Values-Based Goal Setting Form

This Values-Based Goal Setting form should be completed by the employee. **Please read these instructions in their entirety before proceeding to DocuSign to complete the form.** For your convenience, keep the following instructions visible as you complete the form. Before you begin, be prepared to add your values-based S.M.A.R.T Goals. The form provides a full explanation and examples to help you through the process. You will need to review and initial the instructions before you are prompted to add your own goals.

Consult with your manager about the correct contact to add for the HR Representative.

Accessing DocuSign
When you are ready to start, login to DocuSign using one of the two options below.

Option 1:
Click the link below to access the form. It will direct you to DocuSign to login.

Goal Setting - Template Link
https://app.docusign.com/templates/details/2d23bfcc-3a7d-41a9-b03b-21fce6c10183

Option 2:
Access the shared Performance Appraisal Record from within DocuSign.

(1) Go to the Georgia Tech eSignature site: esignature.gatech.edu
(2) Login to DocuSign using your Georgia Tech credentials
(3) Navigate to the Performance Appraisal Form under the Templates section: *Templates/Shared Folders/_Employees/Human Resources/Employee Relations.*
(4) If you use this option, skip to **Step 2** below.

Important:** This is the official Georgia Tech Human Resources (GTHR) Goal Setting template. No other versions should be created, used or shared. Questions regarding the performance appraisal process should be directed to **employee-relations@ohr.gatech.edu

Completing the Form

The following steps will guide you through the completion of the Performance Appraisal Record.
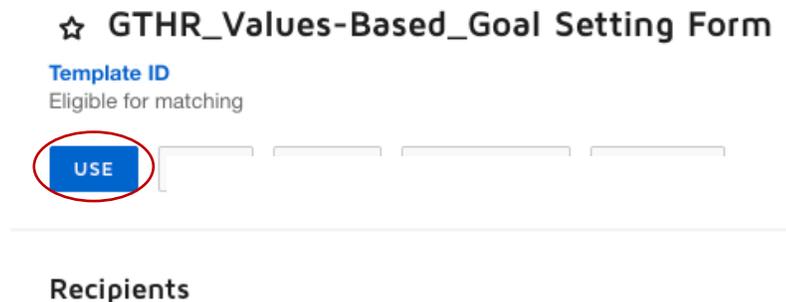
Step 1:

Log into DocuSign using your standard Georgia Tech credentials and email address to login (i.e. **gburdell3@gatech.edu**)

Using your Georgia Tech login will allow you to track the progress of everyone who has been asked to sign your form within your DocuSign account.
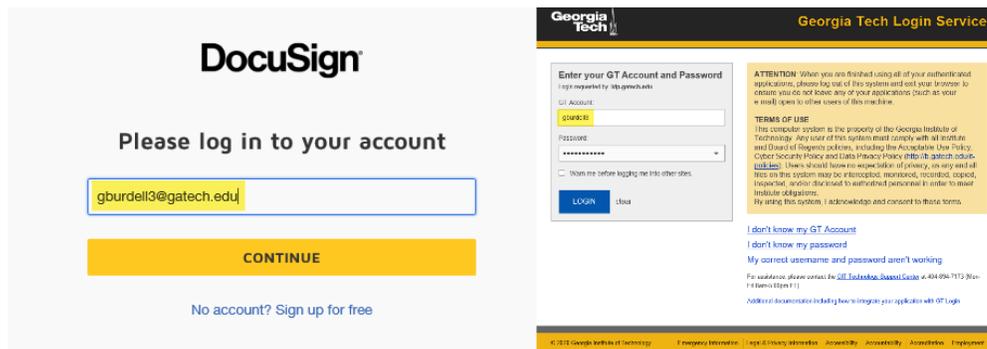

Step 2:

Select the blue "USE" button to begin.


Step 3

For each Georgia Tech recipient, please use the address book icon to find the appropriate person and ensure the recipient signs in with Georgia Tech credentials. This will allow them to track the progress of your document and access your signature request in DocuSign.

As the sender, your name will auto populate as the first recipient. Find your supervisor and the appropriate HR professional for the remaining recipient fields.
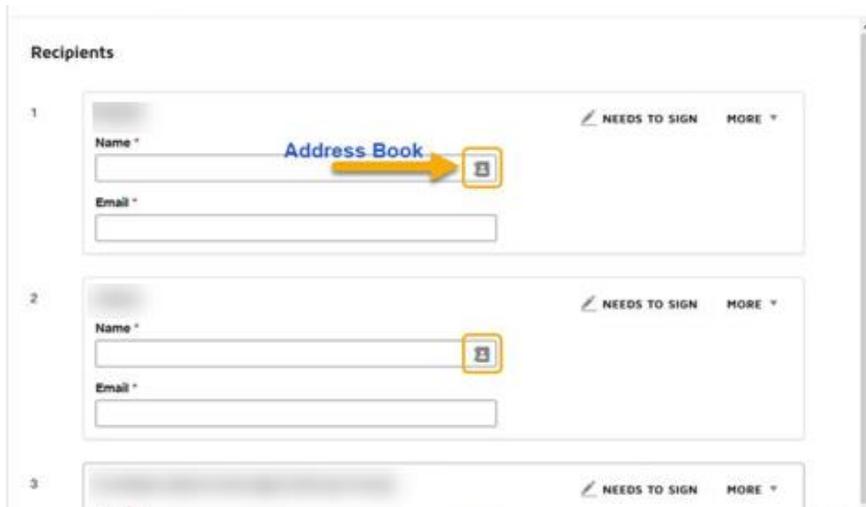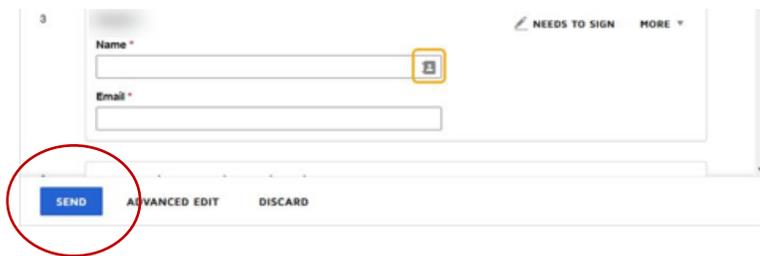
Step 4

At the bottom of the screen, you will see a checked box to create a custom email and language for each recipient. If you would like to send personalized messages, select the "customize email language…" box and write them, as needed.
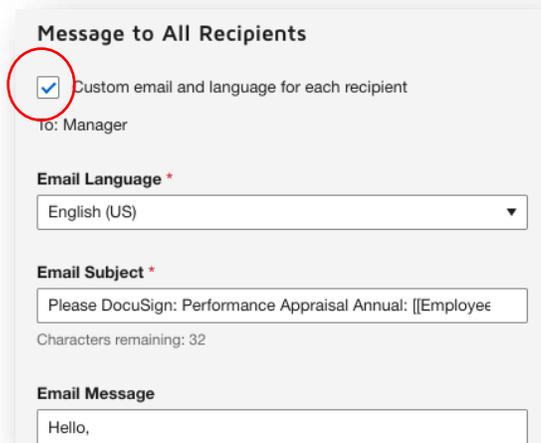
Step 5

Once you have entered all required recipients and any optional email message information, select "SEND."

After clicking SEND, the document is electronically routed via email to each recipient.

Step 6

You, as the sender and first recipient, will complete the form in DocuSign (via the email link you receive or in your DocuSign account).

Then, you will need to complete the assigned fields. If an area is not assigned to you, it will not be fillable.

When you complete the form, you will notice the other recipients' names are not yet listed on the form. However, their names will autofill when they open the form.

Step 7 (Optional)

If cannot complete the form, you can save your progress and come back later. In the top right of the screen under "Other Actions" select "Finish Later" and the form will be waiting for you to complete when you log back into DocuSign.
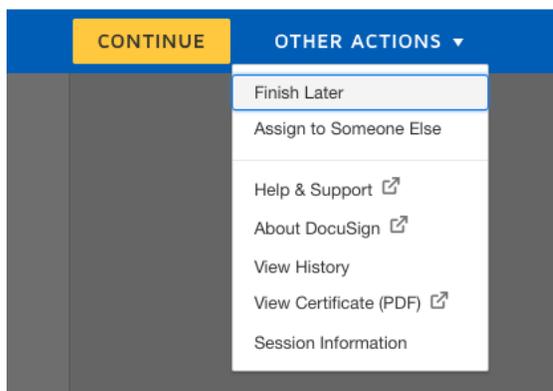
When all recipients have finished signing the document, everyone will receive a PDF copy of the signed form via email attachment. We recommend you save the attachments because DocuSign only retains documents for 6 months.

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For questions regarding the performance appraisal process contact: employee-relations@ohr.gatech.edu