



A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

This document can be found at the following link

<http://www.mass.gov/anf/employment-equal-access-disability/employee-benefits-and-comp/perf-reviews-and-mgmt-comp/2012-aces/signature-stage/>

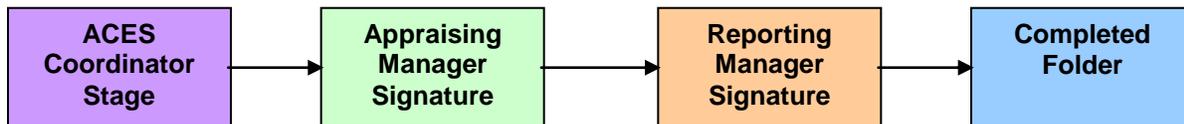
I) Agency ACES Coordinator Instructions

- a) [Ensure All 2012 Forms are in ACES Coordinator Stage](#)
- b) [Route ACES Forms to Signature Stage](#)
 - i. [Move All ACES Forms](#)
 - ii. [Move Some Forms](#)

II) Signature Instructions for Managers

- a) [Electronically Sign ACES Form](#)
- b) [Add Signers to the Form](#)
- c) [Make Revisions to Forms – Return to ACES Coordinator Stage](#)

Routing Steps



I) Agency ACES Coordinator Instructions

After your agency's ACES rating distribution has been approved by the Human Resources Division (HRD) and your Secretariat has notified you of HRD approval, forms can be moved in mass into signature stage.

1. [Login](#) to ACES.
2. Navigate to **My Forms** link and [click](#) on **HR** link. Verify all agency forms are in your inbox.

Note:	<p>If you as ACES Coordinator are missing the HR link (see diagram below), send an email to ACESHelp at HRD-DL-ACESHelp@massmail.state.ma.us</p>
	<p>The screenshot shows a vertical menu with the following items: All Forms, In Progress, Inbox, En Route, Completed, HR, and Form Status. The 'HR' item is highlighted with a red rectangular box.</p>



A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

a) Ensure All 2012 Forms are in ACES Coordinator Stage

If some of your manager's ACES forms are missing from your HR inbox, complete one of the following steps:

- Ask the appraising manager to complete the current form stage(s) by clicking on **“Done! Send Form to ACES Coordinator”**
- or
- For those coordinators with [ACES Administrative Delegated Access](#), use [Route Document](#) feature to move form(s) to Final Review to you in ACES coordinator stage. Please note that when using Route Document – the form is not automatically checked to ensure that all required fields have been filled out. Therefore, it is important to scan the form prior to using this feature to ensure that all final rating selections have been entered.

b) Route ACES Forms to Signature Stage

You can move all or some of your agency's ACES forms from ACES Coordinator to Signature Stage.

i. Move All ACES Forms

1. Under **Items per page** drop-down, select **“All”** so that agency ACES forms display in one page.

Items per page: All

2. Click in the empty box to left of **“Form Title”** field to select **all** ACES forms. It will place check marks next to all ACES forms (see sample below).

<input checked="" type="checkbox"/>	Form Title	Reporting Manager	Step	Form creator	Date Assigned
<input checked="" type="checkbox"/>	2012 ACES Form for Mark Lancaster	Mark Lancaster	ACES Coordinator	Mark Lancaster	09/17/2012
<input checked="" type="checkbox"/>	2012 ACES Form for Linda Shore	Linda Shore	ACES Coordinator	Mark Lancaster	09/17/2012
<input checked="" type="checkbox"/>	2012 ACES Form for James Bento	James Bento	ACES Coordinator	Mark Lancaster	09/17/2012
<input checked="" type="checkbox"/>	2012 ACES Form for Brian Lawrence	Brian Lawrence	ACES Coordinator	Mark Lancaster	09/17/2012

3. Click **“Approve”** button to move all forms simultaneously to the signature phase.

ii. Move Some Forms

1. If there some ACES forms that should not be moved to signature (i.e. managers who have left state service), place a check mark next to only those boxes of forms that should go into signature stage.

<input type="checkbox"/>	Form Title	Reporting Manager	Step	Form creator	Date Assigned
<input type="checkbox"/>	2012 ACES Form for Mark Lancaster	Mark Lancaster	ACES Coordinator	Mark Lancaster	09/17/2012
<input type="checkbox"/>	2012 ACES Form for Linda Shore	Linda Shore	ACES Coordinator	Mark Lancaster	09/17/2012
<input checked="" type="checkbox"/>	2012 ACES Form for James Bento	James Bento	ACES Coordinator	Mark Lancaster	09/17/2012
<input checked="" type="checkbox"/>	2012 ACES Form for Brian Lawrence	Brian Lawrence	ACES Coordinator	Mark Lancaster	09/17/2012

2. Click on **“Approve”** button to move selected forms simultaneously to signature phase with the appraising manager.

Signature Stage Job Aid

II) Signature Instructions for Managers

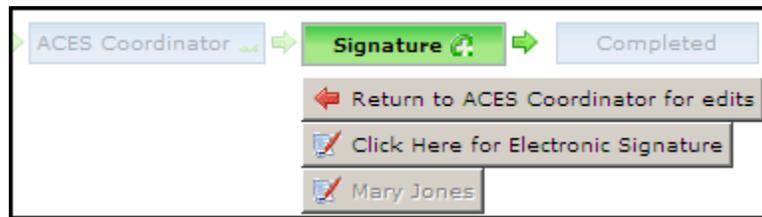
After your agency's ACES rating distributions have been approved, your agency [ACES coordinator](#) moves forms into signature stage. Forms in signature stage route from the appraising manager to the reporting manager to the completed folder. Additional signers may be added to the form if needed (see [Section III b.](#) below). You should receive an email notification once an ACES form has been routed to your inbox.

In signature stage, the forms are read-only format only and cannot be edited. They are routed in the following sequence:

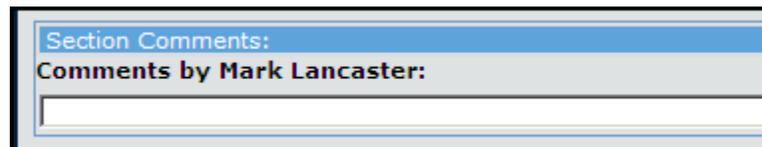


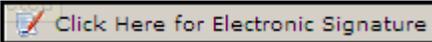
a) Electronically Sign ACES Forms

1. Navigate to **My Forms** and click on form in which you want to sign.
2. Review form to ensure it is in final format. Forms in signature stage will have green backfill in the signature stage box.



3. You may enter optional comments in the **Signature section** before electronically signing the form.



4. Click on **Click Here for Electronic Signature**  icon at either the top or bottom of the form, to electronically sign the form and send it to the next signer or to Completed Stage.
5. **For Appraising Managers only** - Another window appears. In text box, enter any optional text to be included in an email that will be sent to your reporting manager.





A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

6. Click on **Click Here for Electronic Signature** button to electronically sign the form, and send the form to your reporting manager's inbox (or for the reporting manager it is sent directly to the completed folder).

Or click on **Cancel & Return to Form**, to not sign and route the form.

Or (*for Appraising managers only*) click on **Sign and Open Next Form** to sign and send the form to your reporting manager, and return to your inbox to sign other forms (if you have more than one reporting managers' form to sign).

Note to Appraising Manager:	This will be the first time your reporting manager will be seeing his/her 2012 ACES form. You should schedule a formal review session with him/her to discuss his/her annual performance in more depth.
------------------------------------	---

7. By electronically signing the form, it places a date stamp with your name in italics on the form (see sample below). Copies of the form are sent to the **completed folder** of both the Reporting Manager and Appraising Manager.

How to Electronically Sign Form: Appraising Manager clicks on "Click Here for Electronic Signature" button to sign the form and forward it to the reporting manager. Reporting Manager clicks on "Click Here for Electronic Signature" button to sign the form and complete the signature stage.

Date Signature: By selecting "Click Here for Electronic Signature" you are allowing the system to indicate the date you electronically signed the form.

Appraising Manager: Mark Lancaster 09/17/2012
Mark Lancaster

Reporting Manager: James Bento 09/17/2012
James Bento

8. After both parties electronically sign the form, the form should be printed and manually signed. A copy of the completed signed form should also be sent to the agency [ACES coordinator](#).

b) Add Signers to the Form

Signers may be added to an ACES form at any stage, and any person who is in possession of an ACES form can add a signer.

Note: Reasons you may want to add a signer to the form include:	
1.	Appraising manager has left state service, and you want the reviewing manager or acting appraising manager to sign the form.
2.	Reporting manager worked in two different units/agencies during the evaluation cycle, and therefore more than two appraising managers were involved the reporting managers' 2012 ACES evaluation.

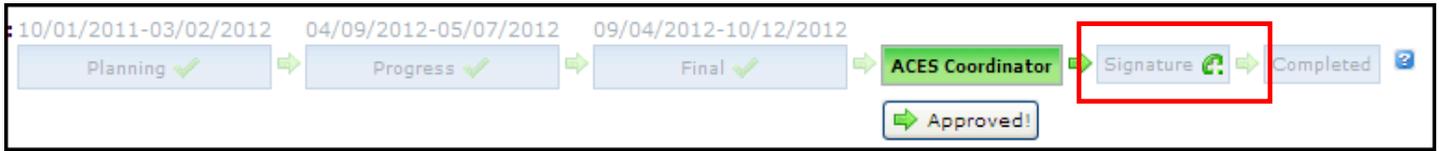
1. Navigate to **My Forms** and click on form in which you want to add a signer.

<input type="checkbox"/>	Form Title ↓	Reporting Manager	Step	Form creator	Date Assigned	Form Start Date	Form End Date	Form Due Date	Sent From	Action
<input type="checkbox"/>	★ 2012 ACES Form for Mark Lancaster	Mark Lancaster	ACES Coordinator	Mark Lancaster	09/17/2012	10/01/2011	09/30/2012	09/30/2012	Mark Lancaster	
<input type="checkbox"/>	★ 2012 ACES Form for Linda Shore	Linda Shore	ACES Coordinator	Mark Lancaster	09/17/2012	10/01/2011	09/30/2012	09/30/2012	Linda Shore	

A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

2. Be sure that **Route Map** is open and you can see stage boxes at the top of the form (sample below).



Tip:	If you do not see stage boxes (as above), on upper left side of form, <u>click</u> on plus + sign next to Route Map . <div style="display: inline-block; border: 1px solid black; padding: 2px; margin: 5px;"> </div>
-------------	--

3. In the **Signature** diagram, click on the plus + sign.

4. Another window opens. The appraising manager and reporting manager names will appear in a box.

2012 ACES Form for Mark Lancaster

Find:

Filtered by:

With: First Name and
 Last Name and
 Username

Using:

Signers	Action
Nancy Lancaster (nancyj)	
Mary Jones (aaaa3)	
Mark Lancaster (markl)	

5. Enter the employee ID (Username) or the manager's last name and initial in the applicable fields, and click on **Search Users** icon.



6. Another box appears. Click on plus sign under **Action** to add manager listed as a signer to the reporting manager's form. **Signers** column will now include the additional manager(s) names with a X mark next to it (see sample below).

My Forms

Find:

Filtered by:

With: First Name and
 Last Name and
 Username

Using:

Name	Action	Signers	Action
Mary Jones (aaaa3)		Mary Jones (aaaa3)	
		➔ Nancy Lancaster (nancyj)	
		Mary Jones (aaaa3)	
		Mark Lancaster (markl)	



A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

- To add more signers to the form, repeat steps 5) and 6) above.
- Click on **Save Changes and Return to Form**, to confirm adding signer(s).



Or click on **Cancel** to not add signer(s) you chose in the previous steps. You can also click on red X mark(s) to delete signer(s), then click on Cancel to delete signers you selected in previous steps.

- After clicking **Save Changes and Return to Form**, you will navigate back to the ACES form. Be sure to click on **Save** icon  at top of form or **Save and Close**  to save the new signer(s) to the form.

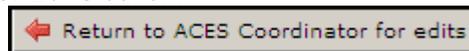
Note to ACES Coordinator: To confirm that an additional signer has been added to the form, navigate to **Reports > Classic Reporting > Detailed Document Search**, and click on radio button **Detailed Search**, under **subject user name**, enter the employee ID of the reporting manager, and click on **Generate Report** button at the bottom of the page. Open the form and navigate to the bottom of the form to view signers on the form. Additional Signers will be listed under **Other** category.

Other:	_____	_____
	Mary Jones	
Appraising Manager:	_____	_____
	Mark Lancaster	
Other:	_____	_____
Reporting Manager:	_____	_____
	James Bento	

c) Make Revisions to ACES Form – Return to ACES Coordinator Stage

Once forms are in signature stage, they are in read-only format. The appraising or reporting manager can click on **“Return to ACES Coordinator for edits”** button if there is something in the form that needs to be edited. The following are instructions for sending the form back to the ACES coordinator.

- Go to **My Forms** link and open the form.
- Click on **Return ACES Coordinator for Edits** button.



- Another window opens.

The dialog box has a green header with the text "Return to ACES Coordinator for edits". Below the header, there is a blue informational message: "You've chosen not to sign this form, and you're now about to revert the form back to the evaluation phase so that changes can be made to the form. The form will be sent to the last evaluator for changes." Below this is the text "Forward Form to David Wall1" and "Comments by Mark Lancaster". There is a large text input area for comments. Below the input area, it says "Comments provided here will be included in email notification(s)". At the bottom, there are three buttons: "Return to ACES Coordinator for edits" (highlighted), "Send and Open Next Form", and "Cancel & Return to Form". A blue arrow points to the first button with the text "For edits, return to agency ACES Coordinator who can make changes as needed."



A Streamlined Approach to the Management Performance Evaluation Process

Signature Stage Job Aid

4. Click on **“Return to ACES Coordinator for edits”** to send the form back to the ACES coordinator who can route the form to final review so edits can be made.

Or click on **Send and Open Next Form** to return the form to the ACES coordinator, and to navigate back to your inbox to work on signing other forms.

Or click on **Cancel & Return to Form**, to not route the form back to the ACES Coordinator.

The form will be returned to ACES Coordinator stage. The agency [ACES coordinator](#) can then route the form back to Final Review Stage so that the appropriate changes can be made to the form.

Note: HRD must approve any changes to the **Overall Final Review Rating**. The form must then route back to the agency [ACES coordinator](#) who then can re-approve it and route it back to signature stage (see [Signature Instructions for Managers](#)) and the signature process starts all over again, starting with the appraising manager.