OnBase-Performance Management

Planning Phase

OnBase emails Rater and Employee to start Planning process

Rater and Employee Meet to lay out Plan

Employee writes up Goals in OnBase

Employee clicks “Complete and Send to Supervisor”

Rater incorporates Employee’s draft goals Into Formal Plan

Either:

Rater clicks “Sign and Send to Employee”

Or:

Rater clicks “Sign and Send to Reviewer”

Either:

Reviewer reviews Planning Stage

Reviewer clicks “Sign”, which sends to Employee

Employee verifies Planning Stage information

Employee clicks “Sign”

OnBase stores Plan through Performing and Monitoring Phase

OnBase-Performance Management
Performing and Monitoring Phase – Progress toward Goals

OnBase emails Rater to perform optional Mid-Year Review

Employee sends Rater correspondence, supporting documents, etc.

Rater and Employee meet regularly

Rater documents progress toward Goals

Reviewer (Supervisor), Customers, Colleagues, and Others send Rater supporting correspondence

Performing and Monitoring Phase – Changes Needed to Planning Stage

OnBase emails Employee and Rater that Planning Stage has changed

Employee verifies Planning Stage Changes

Employee clicks “Sign”

Rater makes changes to Plan (including adding or removing info)

Rater clicks “Sign and Send to Employee”

OnBase stores Updates through Performing and Monitoring Phase

OnBase emails Employee and Rater that Planning Stage has changed

Employee verifies Planning Stage Changes

Employee clicks “Sign”
OnBase-Performance Management

**Evaluation Phase**

1. **OnBase**
   - Sends emails to Rater and Employee to start evaluation process.

2. **Employee**
   - Performs self-evaluation.
   - Clicks "Complete and Send to Supervisor".

3. **Rater (Supervisor)**
   - Incorporates self-evaluation into formal evaluation.
   - Clicks "Sign", which sends to reviewer.

4. **Reviewer (Supervisor)’s Supervisor**
   - Adds optional comments on signature page.
   - Clicks "Sign", which sends to rater.

5. **Reviewer (Supervisor)**
   - Adds any final comments.
   - Clicks "Sign".

6. **Rater and Employee**
   - Meet to discuss evaluation.

7. **Rater**
   - Clicks "Send to Employee for Completion".

8. **OnBase**
   - Submits signed final evaluation to HR.
   - Employee clicks "Sign".