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"

Or:

Rater clicks “Sign and Send to Reviewer”

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 performs Monitoring Phase
OnBase-Performance Management

Performing and Monitoring Phase – Progress toward Goals

OnBase emails Rater to perform optional Mid-Year Review

OnBase stores Progress through Performing and Monitoring Phase

OnBase emails Employee and Rater that Planning Stage has changed

OnBase stores Updates through Performing and Monitoring Phase

Employee documents progress toward goals

OnBase stores Progress through Performing and Monitoring Phase

Employee verifies Planning Stage Changes

Employee clicks “Sign”

Rater documents progress toward Goals

Rater and Employee meet to discuss changes

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

Rater clicks “Update Notification”

Rater and Employee meet to discuss changes

Rater and Employee meet regularly

Reviewer (Supervisor), Customers, Colleagues, etc.

Reviewer, Customers, Colleagues, and Others send Rater supporting correspondence

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

Reviewer (Supervisor), Customers, Colleagues, etc.
OnBase-Performance Management

**Evaluation Phase**

OnBase emails Rater to start Evaluation process by requesting Employee complete a self-review.

Employee performs Self-Evaluation.

Employee clicks "Complete and Send to Supervisor".


Rater clicks "Sign", which sends to Reviewer.

Reviewer adds optional Comments on Signature Page.

Reviewer clicks "Sign", which sends to Rater.

Review waits in Rater’s queue until meeting with Employee.

Rater and Employee Meet to Discuss Evaluation.

Rater clicks "Send to Employee for Completion".

Employee adds any final comments.

Employee clicks "Sign".

PDF sent to Employee and Rater within 24 hours.

OnBase submits Signed Final Evaluation to HR.

Employee clicks "Sign".

OnBase submits Signed Final Evaluation to HR.

PDF sent to Employee and Rater within 24 hours.