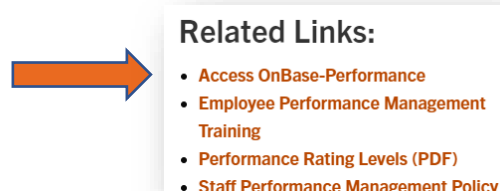
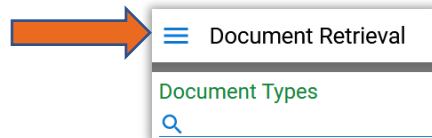


Quick Reference: OnBase-Performance Workflow

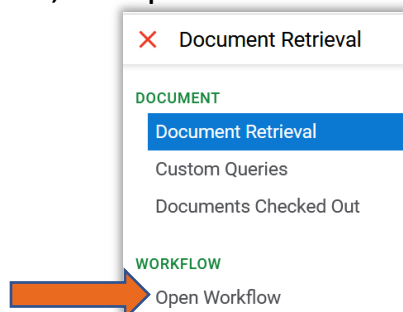
- 1) Click a link below to navigate to Clemson HR's Staff Performance Management Process
 Employees: <https://www.clemson.edu/human-resources/current-employees/performance/staff.html>
 Supervisors: <https://www.clemson.edu/human-resources/supervisors/managing-performance/staff.html>
- 2) Under Related Links on the right side of your screen, click "Access OnBase-Performance."



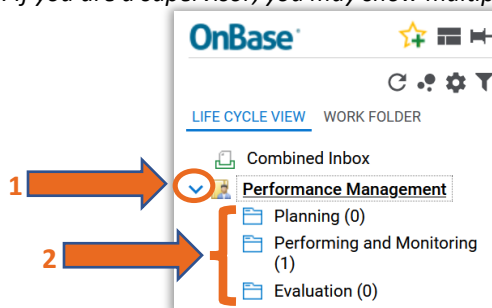
- 3) Login using your Clemson credentials and Duo.
- 4) In the top left corner of your screen, click the three lines beside "Document Retrieval."



- 5) In the Document Retrieval Menu, click "Open Workflow."



- 6) Click the arrow beside "Performance Management," and then select your form by clicking the folder with the (1) beside it. If you have not yet established your planning stage, your (1) will be beside "Planning." If have established your planning stage, your (1) will be beside "Performing and Monitoring." If you are at your evaluation stage, your (1) will be beside "Evaluation." **NOTE: If you are a supervisor, you may show multiple forms in multiple stages.*



- 7) Your form should appear at the bottom of your screen. You can adjust the height of your form by placing your mouse where the tiles intersect. Click and drag to resize any tile.
- 8) **To fill in your Planning Stage, click through the tabs of the Performance Management form, and fill-in your information. At the bottom of each page, click the "Submit (Save)" button. This does not submit the form to your supervisor. It simply submits it to the database to save it. Save frequently so you can come back to your form for additional edits. Use the keyboard shortcut "ctrl v" to paste into OnBase.**
- 9) **Once you are happy with your form, click the "Complete and Submit to Supervisor" button.** When your supervisor has reviewed and approves, the form will route back to you electronically to sign. You will receive an email when your planning stage is ready for your signature.

