Performance Appraisals OnBase Flow

1. **Initial Performance Meeting -** this link will allow supervisors to:
   - Fill in employee information: employees will need their ID# and supervisors will need the Position#
   - Review core competencies
   - Write SMART goals
   - Provide comments
   - Submit to HR

*Supervisor and employee will receive an e-mail with a link to the completed submission

2. **Mid-Year Review:** for all employees with a submitted initial plan, an automatic e-mail will generate Nov. 1st with a link that reminds supervisors to complete an employee's mid-year review (due before Winter Break). This link will allow supervisors to:
   - Fill in employee information like above
   - Review progress in core competencies
   - Revise SMART goals (you will want access to the previous submission to revise if necessary)
   - Provide Comments
   - Submit to HR

*Supervisor and employee will receive an e-mail with a link to the completed submission

3. **Employee Goal Assessment:** A fillable PDF will be sent to all employees. The submit button on the PDF will transfer the employee to their Outlook and they can send it to their supervisor.
   - Supervisors should save this e-mail in their performance appraisal folder, and/or as a physical copy on their desktop in a folder labeled for appraisals.
   - This document will be attached to the employee's final evaluation form in OnBase during the Year-End evaluation.

4. **Year-End Evaluation:** for all employees with a submitted mid-year review, an automatic e-mail will generate April 13th with a link that reminds you to complete an employee's year-end evaluation by June 1st, 2022. This link will allow you to:
   - Fill in employee information
   - Attach employee goal assessment
   - Evaluate core competencies
   - Evaluate employee goals
   - Provide commentary
   - Submit to HR

*Supervisor and employee will receive an e-mail with a link to the completed submission

Once the final evaluation has been reviewed by HR, supervisors will receive a confirmation e-mail.

Important info and tips:

- OnBase times out after 70 minutes and there is no save function.
- For organizing and tracking performance appraisal submissions: In your Outlook, create a folder for FY22 performance appraisals. When you get this e-mail move it to the folder. You can set up a rule in Outlook to automatically file it for you.
- If you lose a submission link, contact HR, we can re-send the link.
- For organizing and tracking PDF goal assessments: Move the e-mails with the goal submission to the FY22 folder in your Outlook, or save a copy in a dedicated performance appraisal folder on your computer.
- There is a Performance Appraisal webpage nestled underneath HR – this will be updated with appropriate OnBase links and resources.
- Training will be provided in an on-going fashion for supervisors – both closer to the mid-year review and the year-end evaluation.
- Training will be provided for employees in an on-going fashion as well.