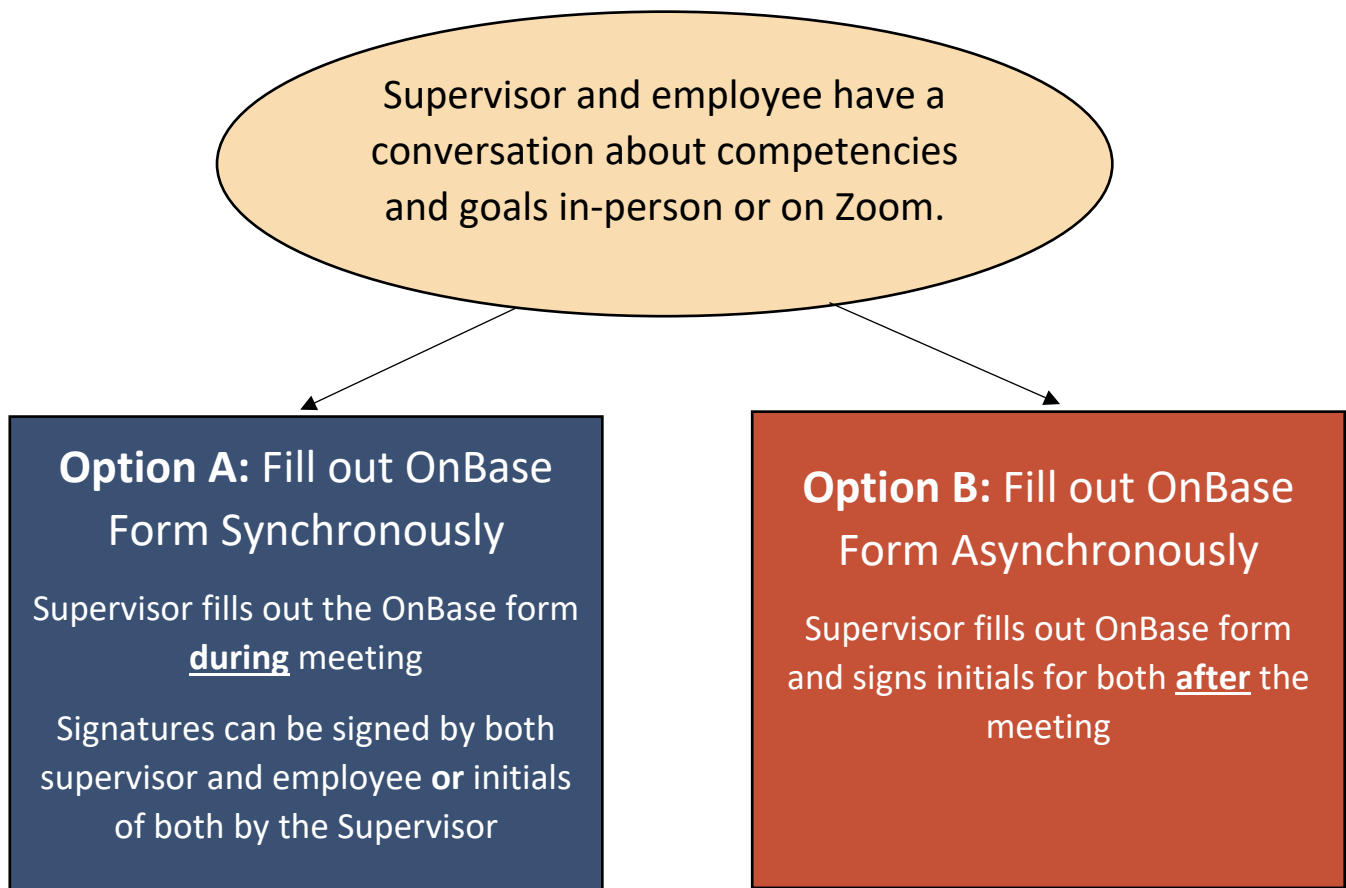


Mechanics Behind the Initial Plan

- Supervisor & supervisee meet to discuss competencies and goals
 - Goals may be drafted by the supervisee prior to the meeting and edited as the discussion in this meeting progresses
- The initial plan in OnBase needs to be filled out all in one sitting by one person (the supervisor)
 - OnBase times out after 70 minutes.
- Once the form is submitted, there is no editing it.
 - The submission goes to HR and the supervisor & employee get a copy.
- Signatures can be completed by:
 - both supervisor and employee if they are in the room together and comfortable sharing a mouse, **OR**
 - the supervisor can sign initials for both and that will indicate the supervisor and employee have met and agree

What the Mechanics May Look Like in Practice:



NOTE: In either scenario – the supervisor needs the employee ID number to fill out the OnBase form. If a supervisor chooses to fill out the OnBase form after the meeting, they will need a copy of the employee's goals.