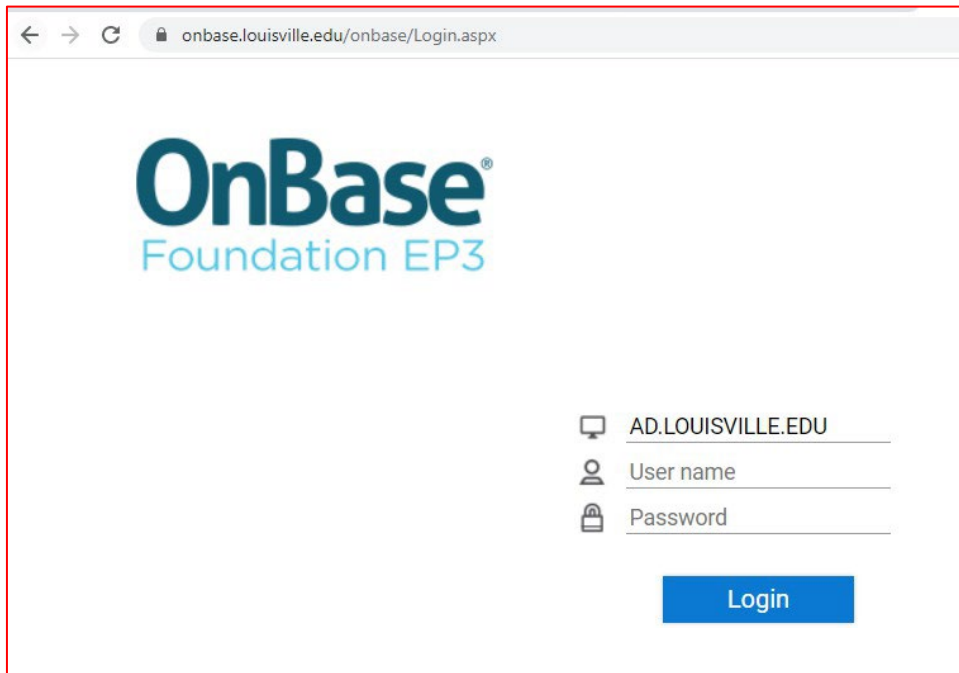
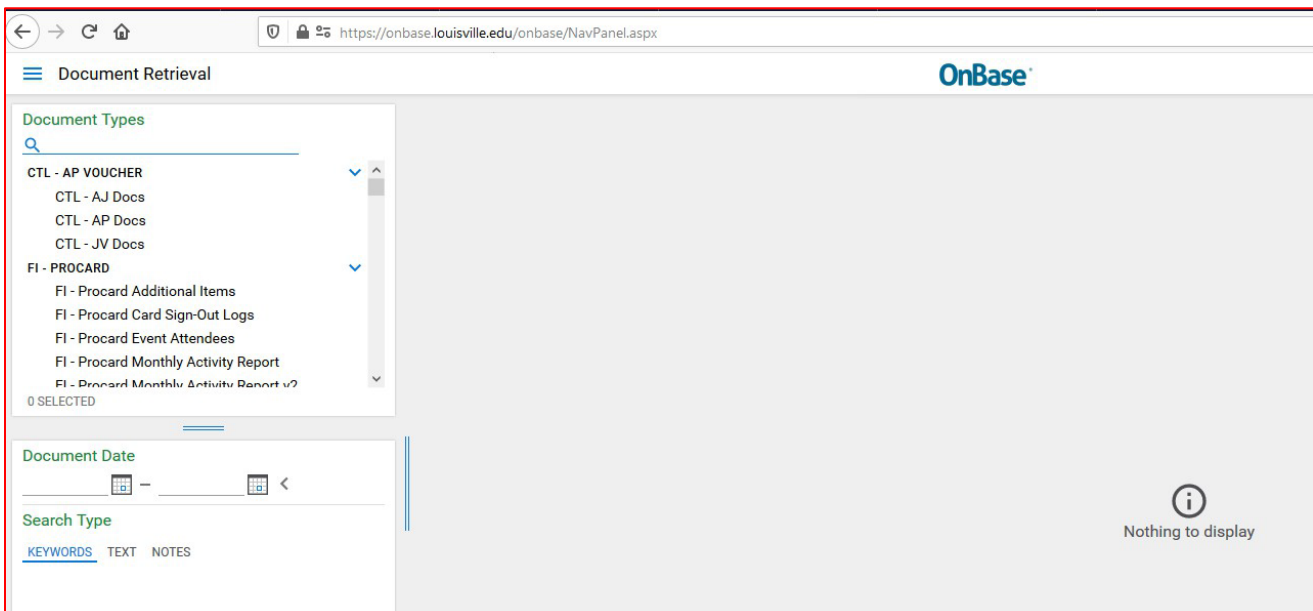


Designated users from each department/unit can upload performance evaluations to OnBase. If a designated user needs access, please **contact Human Resources at askhr@louisville.edu** and a ticket will be submitted for the designee to gain access. Follow the steps below to upload and retrieve performance evaluations on the web version of OnBase.

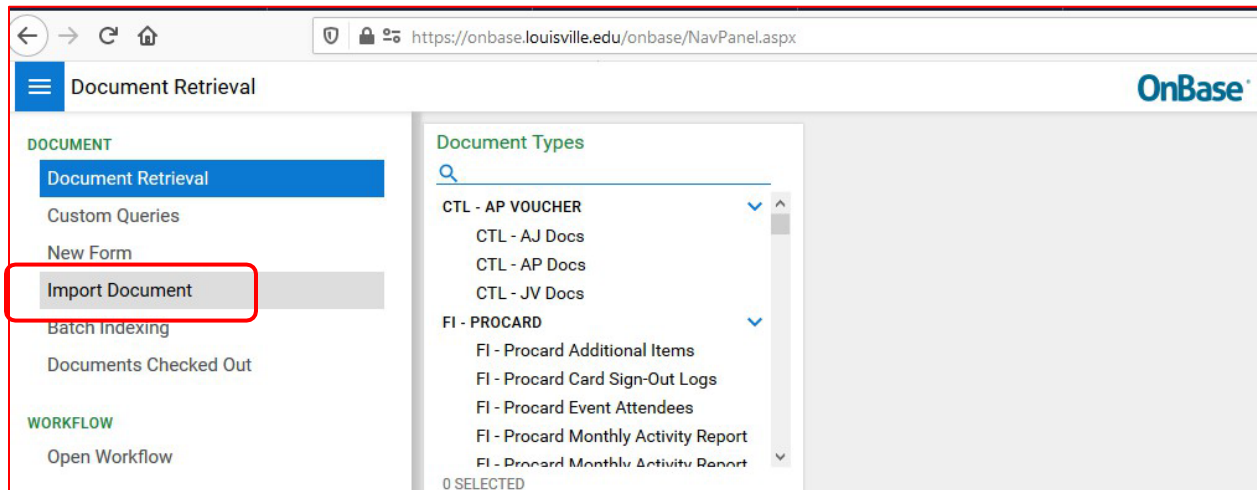
1. Go to **<https://onbase.louisville.edu>** and log in using UofL userID and password.



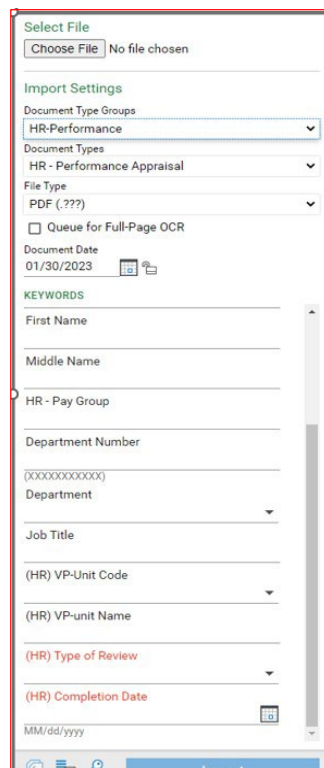
2. Click on the Menu icon  then **Document Retrieval**.



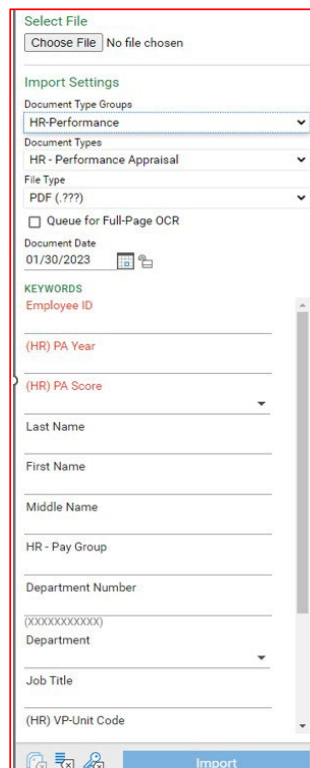
- Click on **Import Document** from menu.



- Click on **Document Type Groups** and select **HR-Performance**. Make sure the following fields in the Import Settings are populated with the following:
 - Document Type: **HR – Performance Evaluation**
 - File Type: **PDF (.???)**
 - **Note: If you do not see this group, you do not have access to upload the evaluations for your Supervisory Organization and you should contact askhr@louisville.edu for access.**
- Enter in data for the following required fields: **Employee ID, (HR) PA Year, (HR) PA Score, (HR)Type of Review and (HR) Completion Date**. **Note: the abbreviation PA stands for Performance Evaluation. 2023 should be entered in the (HR) PA Year field.**



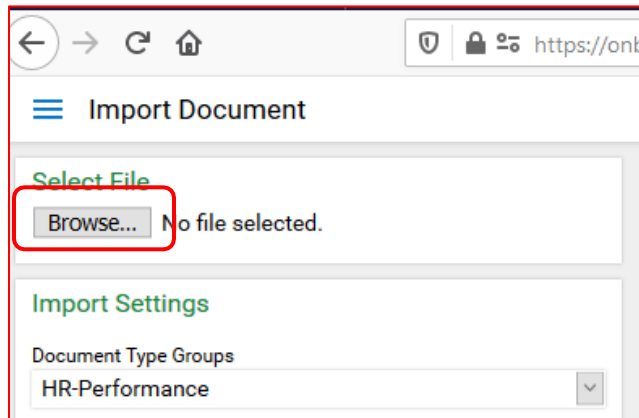
The screenshot shows the 'Import Settings' form. The 'Document Type Groups' dropdown is set to 'HR-Performance'. The 'Document Types' dropdown is set to 'HR - Performance Appraisal'. The 'File Type' dropdown is set to 'PDF (.???)'. The 'Queue for Full-Page OCR' checkbox is unchecked. The 'Document Date' is set to '01/30/2023'. The 'KEYWORDS' section includes fields for 'First Name', 'Middle Name', 'HR - Pay Group', 'Department Number', 'Department', 'Job Title', '(HR) VP-Unit Code', '(HR) VP-unit Name', '(HR) Type of Review', and '(HR) Completion Date'.



The screenshot shows the 'Import Settings' form. The 'Document Type Groups' dropdown is set to 'HR-Performance'. The 'Document Types' dropdown is set to 'HR - Performance Appraisal'. The 'File Type' dropdown is set to 'PDF (.???)'. The 'Queue for Full-Page OCR' checkbox is unchecked. The 'Document Date' is set to '01/30/2023'. The 'KEYWORDS' section includes fields for 'Employee ID', '(HR) PA Year', '(HR) PA Score', 'Last Name', 'First Name', 'Middle Name', 'HR - Pay Group', 'Department Number', 'Department', 'Job Title', and '(HR) VP-Unit Code'.

- Information should pull directly from system to populate the rest of the fields, if it doesn't, please enter the department number.

- Go to the top of the menu and click **Browse** under **Select File** and import/upload the evaluation for the employee you have specified.



← → ↻ 🏠 🔒 📄 https://onb

Import Document

Select File

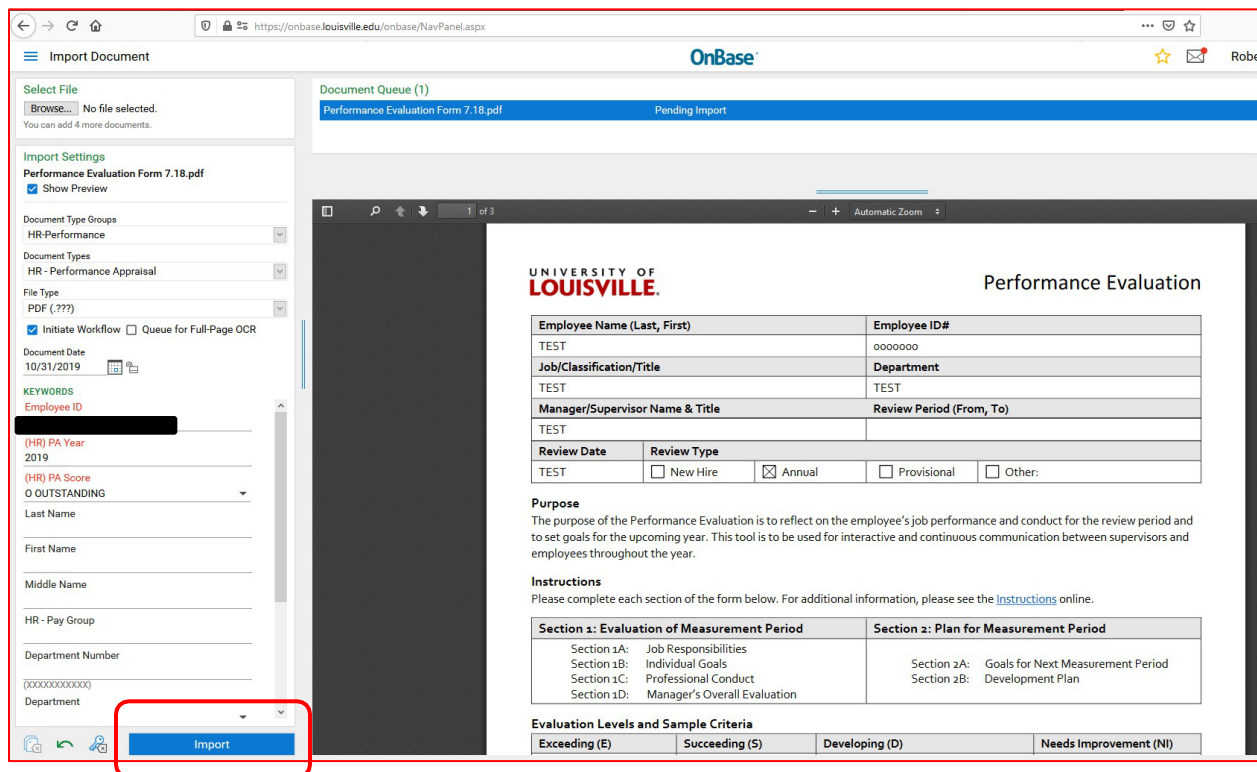
Browse... No file selected.

Import Settings

Document Type Groups

HR-Performance

- Your document will populate in the window and then select **Import** at the bottom of the page.



← → ↻ 🏠 🔒 📄 https://onbase.louisville.edu/onbase/NavPanel.aspx

Import Document

Select File

Browse... No file selected.

You can add 4 more documents.

Import Settings

Performance Evaluation Form 7.18.pdf

☒ Show Preview

Document Type Groups

HR-Performance

Document Types

HR - Performance Appraisal

File Type

PDF (???)

☒ Initiate Workflow ☐ Queue for Full-Page OCR

Document Date

10/31/2019

KEYWORDS

Employee ID

(HR) PA Year

2019

(HR) PA Score

O OUTSTANDING

Last Name

First Name

Middle Name

HR - Pay Group

Department Number

(XXXXXXXXXXXX)

Department

Import

Document Queue (1)

Performance Evaluation Form 7.18.pdf

Pending Import

Performance Evaluation

Employee Name (Last, First)

TEST

Employee ID#

0000000

Job/Classification/Title

TEST

Department

TEST

Manager/Supervisor Name & Title

TEST

Review Period (From, To)

TEST

Review Date

TEST

Review Type

☐ New Hire ☒ Annual ☐ Provisional ☐ Other:

Purpose

The purpose of the Performance Evaluation is to reflect on the employee's job performance and conduct for the review period and to set goals for the upcoming year. This tool is to be used for interactive and continuous communication between supervisors and employees throughout the year.

Instructions

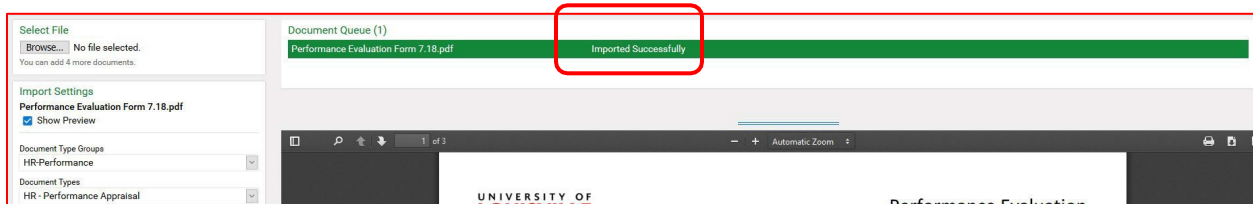
Please complete each section of the form below. For additional information, please see the [Instructions](#) online.

Section 1: Evaluation of Measurement Period	Section 2: Plan for Measurement Period
Section 1A: Job Responsibilities	Section 2A: Goals for Next Measurement Period
Section 1B: Individual Goals	Section 2B: Development Plan
Section 1C: Professional Conduct	
Section 1D: Manager's Overall Evaluation	

Evaluation Levels and Sample Criteria

Exceeding (E)	Succeeding (S)	Developing (D)	Needs Improvement (NI)

- Once uploaded, you'll receive a message that it was **Imported Successfully**.



Select File

Browse... No file selected.

You can add 4 more documents.

Import Settings

Performance Evaluation Form 7.18.pdf

☒ Show Preview

Document Type Groups

HR-Performance

Document Types


HR - Performance Appraisal

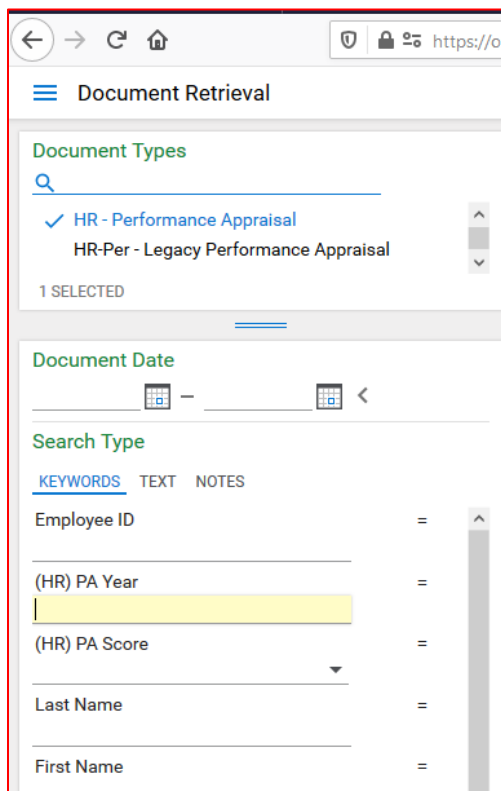
Document Queue (1)

Performance Evaluation Form 7.18.pdf

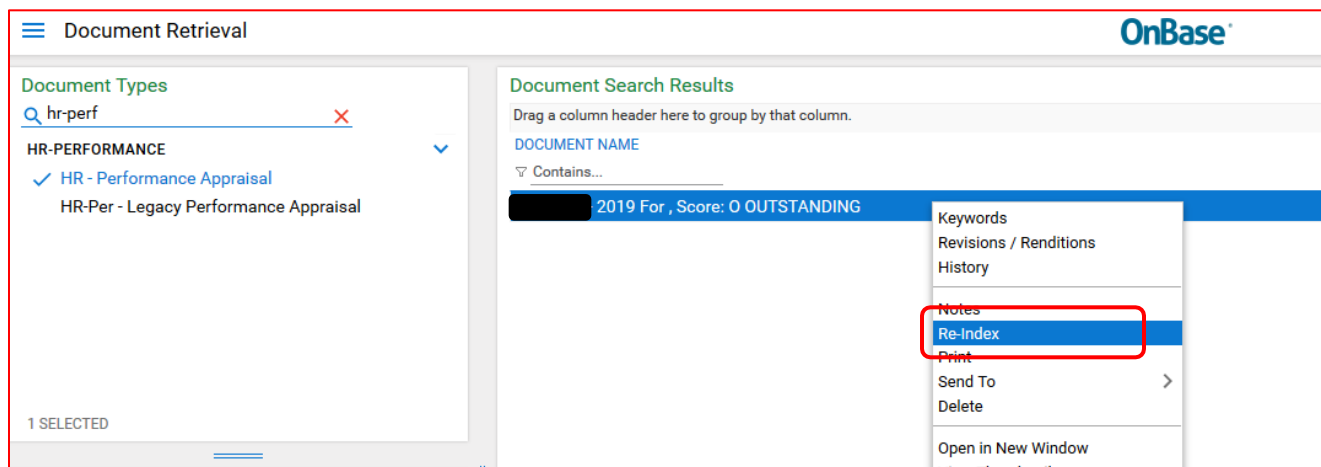
Imported Successfully

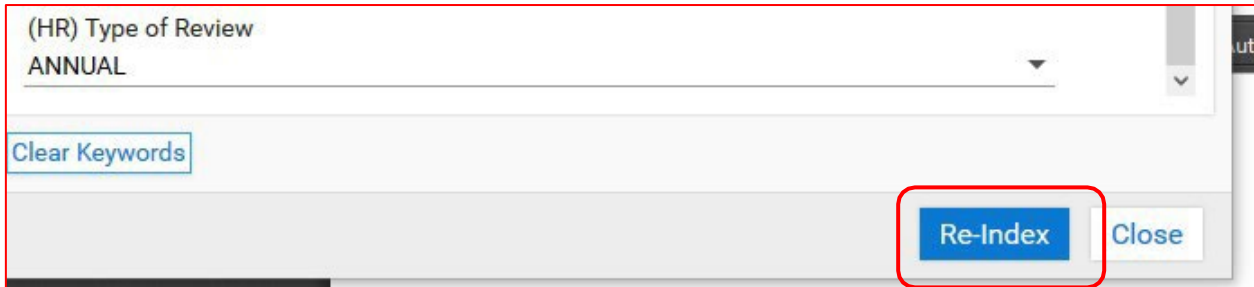
Performance Evaluation

10. To Retrieve/View the uploaded document, click on the menu icon  at the top left and select **Document Retrieval**.
11. Under **Document Types**, scroll to find **HR-Performance** or type in **HR-Performance** and select **HR – Performance Evaluation**.



12. Enter the criteria you wish to retrieve (e.g., employee ID number, name, etc.).
13. If updates need to be made to the document, right click on the document, make the updates and click **Re-Index**.





(HR) Type of Review
ANNUAL

Clear Keywords

Re-Index Close

14. If you need to delete a duplication, please contact Human Resources at askhr@louisville.edu with the employee's name and employee ID number, and what information will need to be updated.
15. If you have technical questions regarding the uploading of Performance Evaluations to OnBase, please contact the ITS Help desk at helpdesk@louisville.edu.