

# How to: Upload Annual Performance Review



- Purpose:

Complete and upload annual performance evaluations for your direct reports
- System Requirements:

BU username and Kerberos logon
- Data/File Requirements:

Individual annual review for your direct reports saved as a .pdf. Each employee must have their own file saved for upload.
- Time Sensitivity:

High

## Table of Contents/Overall Performance Review Steps:

Step 1	Step 2	Step 3
<a href="#">Download current performance evaluation</a>	<a href="#">Complete one evaluation and acknowledgement e-mail per direct report and save as .pdf</a>	<a href="#">Upload to Onbase Performance Appraisal site</a>

### Step 1: Download Current Performance Evaluation Template

Performance evaluations can be found on the HR Forms and Documents Library: <https://www.bu.edu/hr/forms-documents/>, the performance evaluation template specific to non-represented staff can be downloaded here: [http://www.bu.edu/hr/documents/PE\\_Form\\_NREP\\_Staff.docx](http://www.bu.edu/hr/documents/PE_Form_NREP_Staff.docx)\*

Further resources on how to write the performance reviews can be found on the Performance Management site: <https://www.bu.edu/hr/manager-resources/performance-management/administrative-employees-exempt-and-non-exempt-excluding-staff-represented-by-collective-bargaining-agreements/>

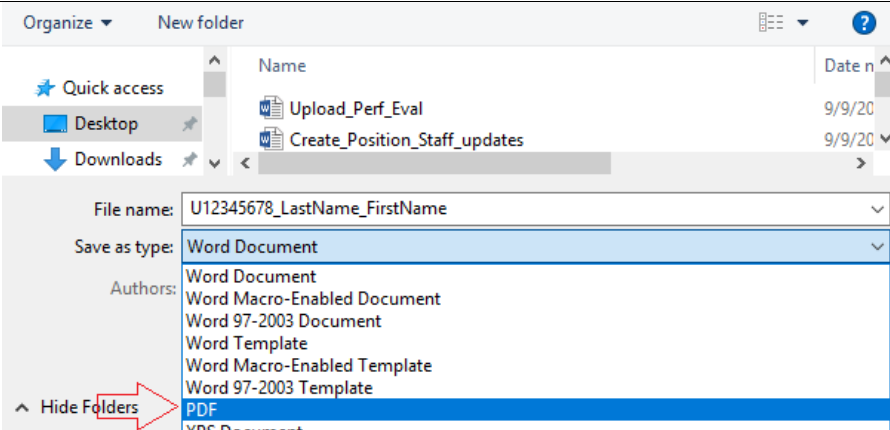
\*The template must be filled out in Word 2016 or later, contact IS&T if you need this version installed.

### Step 2: - Complete one eval per direct report and save as .pdf

Completely fill out the review as outlined here: [https://www.bu.edu/hr/documents/Preparing\\_the\\_Performance\\_Evaluation\\_Form.pdf](https://www.bu.edu/hr/documents/Preparing_the_Performance_Evaluation_Form.pdf). Prior to saving as a .pdf make sure to save an editable word doc for yourself in case edits need to be made. To save as a .pdf for upload:

- Click File -> Save As (local file)
- Name the file as (use employee's real UID/name): Uxxxxxxx\_LastName\_FirstName
- Use the pulldown to change "Save as type" to PDF and then click save

Please do not name the file in any other way. It is important that you save with the naming convention and in the format listed in the steps above.



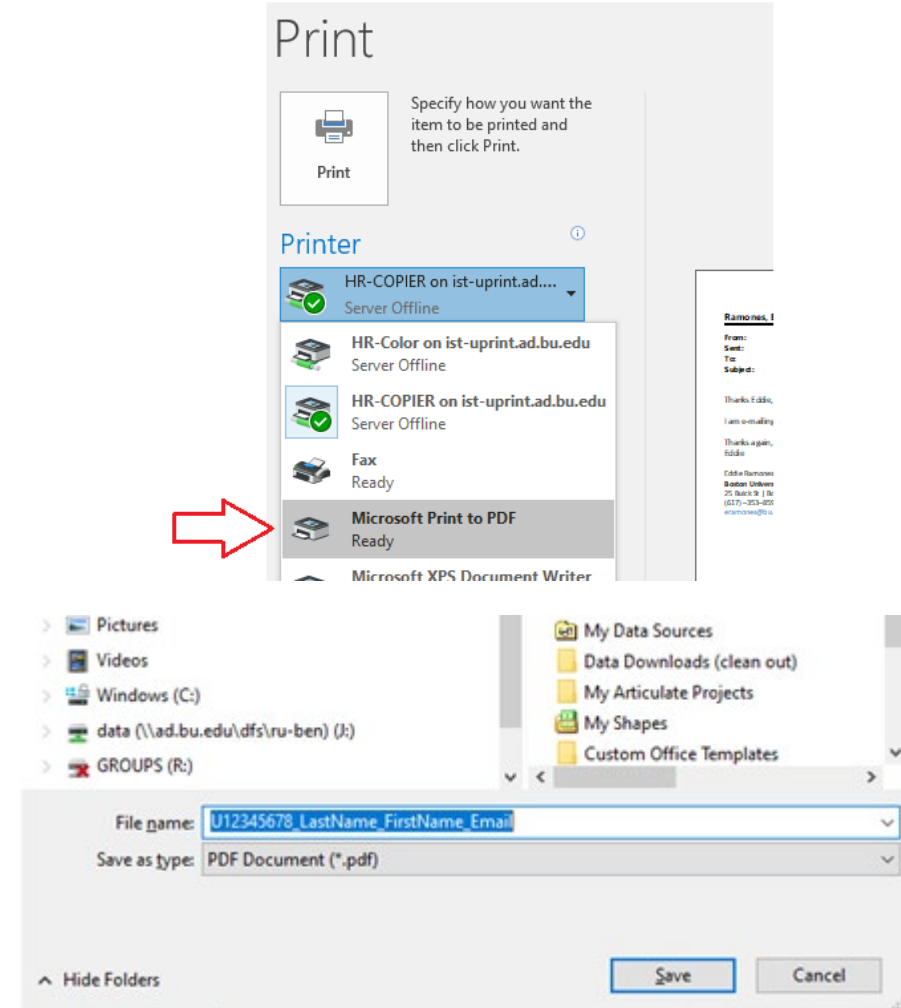
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## Step 2: Continued

Print your direct report's e-mail that acknowledges that their review was received as a .pdf:

- Open the e-mail, press "ctrl+P" or click "file" then "print"
- Change the printer to "Microsoft Print to PDF", "Adobe PDF" or any other PDF printing equivalent then click the "Print" icon\*
- When the save prompt opens name your file: Uxxxxxxx\_LastName\_FirstName\_email then click save

\*If you do not have the "Microsoft Print to PDF" or any other print to PDF option please contact IS&T to have them install a PDF printer option.



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## Step 3: - Upload to Onbase Performance Appraisal site

Users can upload performance reviews for their employees directly into Onbase, the personnel record document management system, through a specialized portal. The steps to process the upload are below:

- Go to: <https://www.bu.edu/hr/manager-resources/performance-management/manager-resources-performance-management-unity-form/>
- Once the form loads, fill out “Employee UID” field and press enter. If the UID was entered correctly then the following fields will be populated with the employee’s info:
  - Employee Last and First Name
  - Employee Dept/School
  - Evaluation Year
- Please check the data after autofill, if it looks correct\* continue by:
  - Attaching the performance evaluation saved in step #2
  - Attaching the e-mail acknowledgement saved in step #2
  - Selecting the “Overall Rating” reflected in the saved review
  - Filling out your e-mail address in the “Uploaded by” field
  - Click “Submit Evaluation”.

\*If the data does not populate or is incorrect for the UID entered please contact HRIS (Human Resources Information Systems) at [hrs@bu.edu](mailto:hrs@bu.edu) for assistance.

Once you click submit you will see a confirmation screen. You may close the page if you have no further uploads. If you do have more uploads refresh the browser or click the highlighted link in the text.

Please submit only one finalized review per employee/UID.

## Performance Appraisal Submission Form

Please wait. This form may take a moment to load.

**Performance Appraisal Submission Form**

Employee UID: (e.g. U00000000) \*  
U12345678

Employee Last Name \* Cat Employee First Name \* Kitty Review Type \* NREP

Employee Dept/School  
COLLEGE OF CATMMUNICATION; CAT VIDEO PRODUCTION

**Upload Performance Evaluation**

PER Performance Evaluation \*

Attach Performance Evaluation Use this button to attach the performance eval as a .pdf

An optional email confirmation or separate signature may be attached. Please save email confirmation as a .pdf file before attaching.

Attach Email Confirmation/Signature Use this button to attach the acknowledgement e-mail as a .pdf

Evaluation Year: (YYYY) \*  
20XX

Overall Rating: \*  
1 2 3 4 5  
○ ○ ○ ● ○

Uploaded by: (full email address) \*  
eramones@bu.edu

Submit Evaluation

## After Submission:

## Performance Appraisal Submission Form

Please wait. This form may take a moment to load.

Thank you for submitting the form. To submit an additional Performance Evaluation, refresh this page or click for a new [Performance Evaluation Submission](#).