

INSTRUCTIONS FOR UPLOADING A MANAGEMENT PLAN:

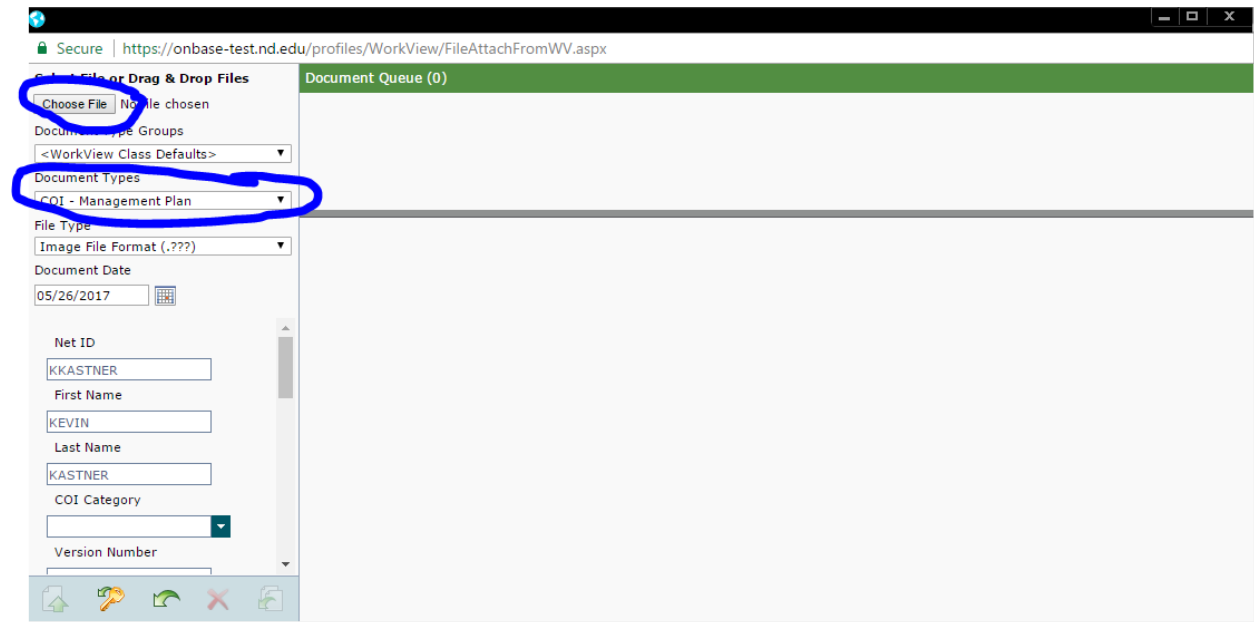
After the management plan is finalized in word, it must be converted to a .pdf file to upload into the OnBase system.

To enter the system, you may click the link sent to you in this email. You may alternatively, browse to <https://onbase-prod.cc.nd.edu/profiles/Workview/filterPop.aspx?filterPop=true&filterID=>

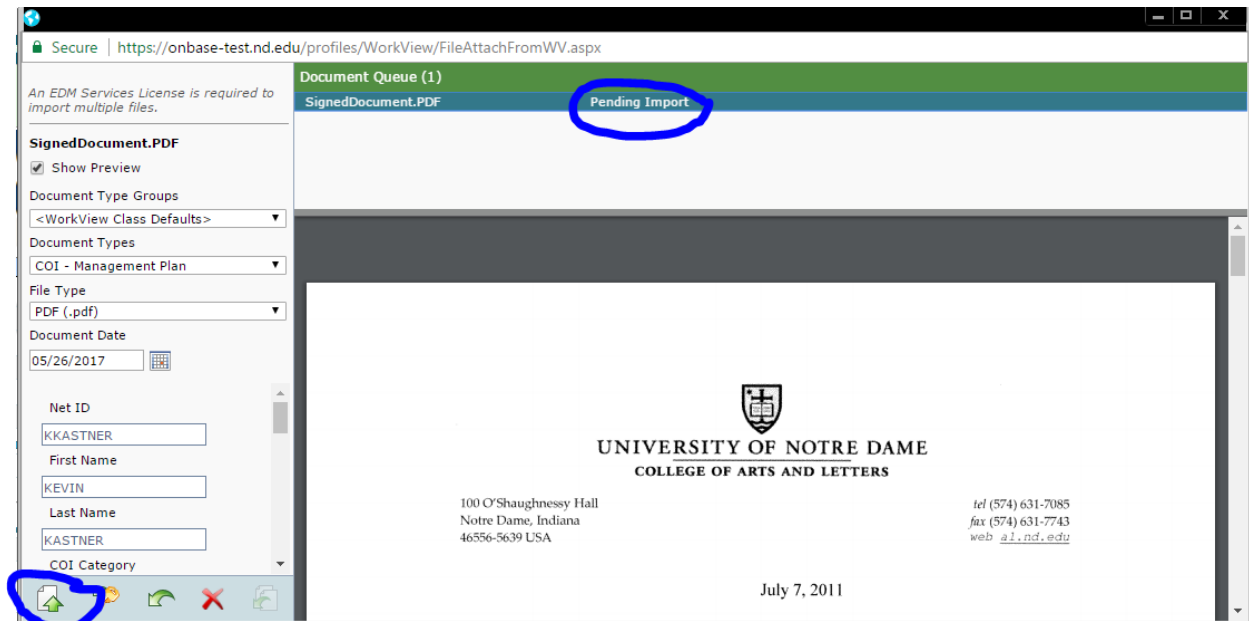
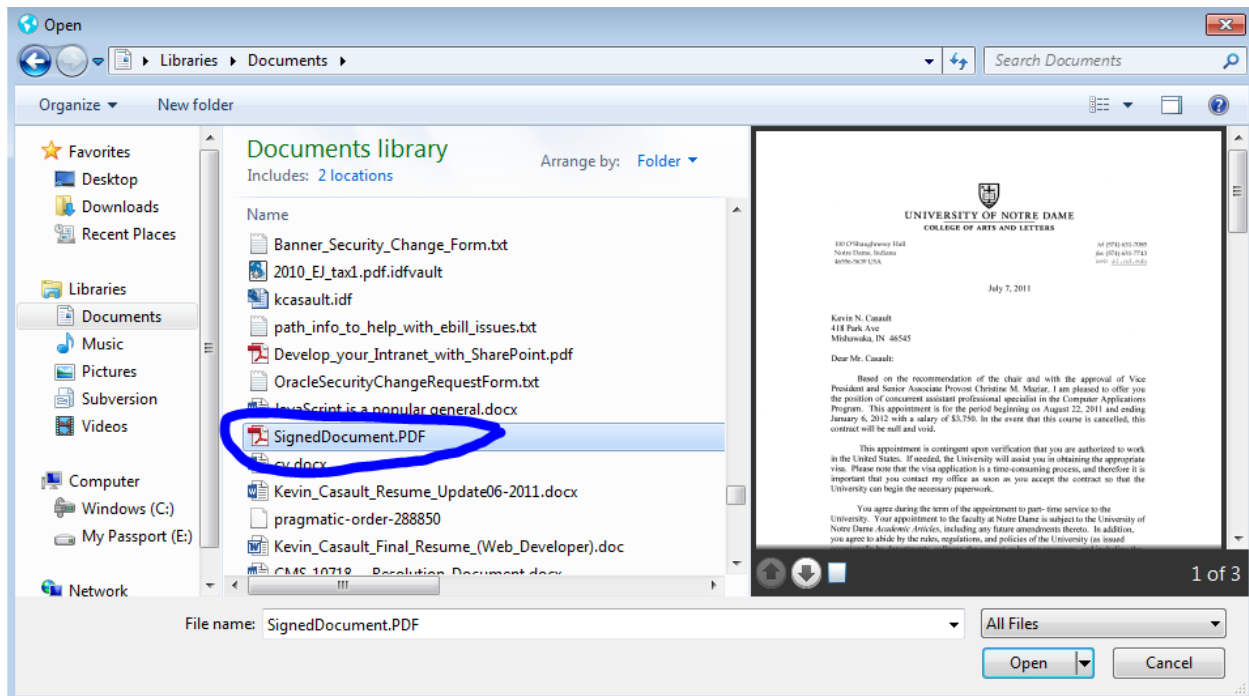
. Select the member's disclosure.

The screenshot shows a web form with several input fields and dropdown menus. The fields include 'Reviewer NetID' (value: DKROLL), 'Reviewer Name' (value: DOUGLAS KROLL), 'Oversight Manager NetID', and 'Oversight Manager Name'. There are also dropdown menus for 'AWAITING MGT PLAN' and 'Management Plan Status' (value: WAITING). A blue circle highlights a small icon in the top right corner of the form area.

Click **Choose File** to locate the management plan document on your computer, select a file,

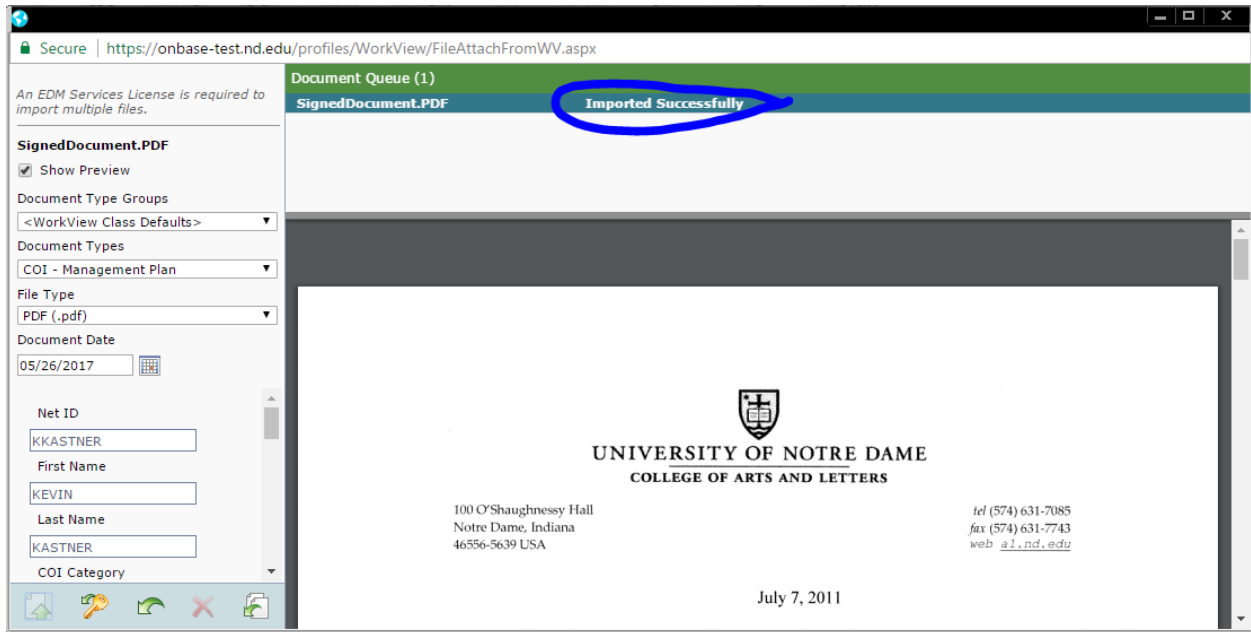


and click **Open**.



Click the **Upload** button .

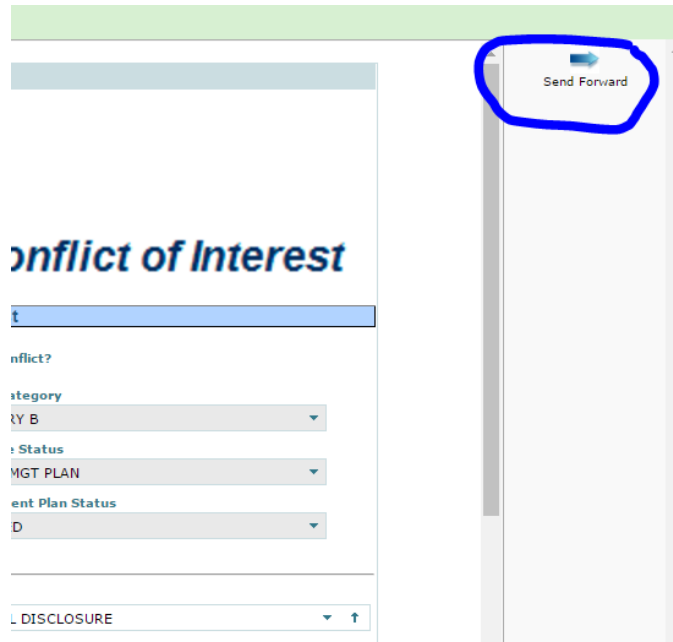
You will receive a message indicating that the Management Plan has been successfully uploaded. The disclosure status will change.



Close upload window then save

Reviewer NetID DKROLL	Reviewer Name DOUGLAS KROLL	Management Plan Status UPLOADED
Oversight Manager NetID	Oversight Manager Name	COI - Management Plan - 5/26/2017 for KEVIN KASTNER - 2017 ANNUAL DISCLOSURE
Work Notes		

Then click the "Send Forward" action to move the disclosure to the next step in the process.



Close the disclosure window and move to your next item or exit OnBase.