

2016

# Cloning a Document

MANAGER (Rater)



## Cloning a Document

The process of Cloning in ePerformance involves taking an existing performance or development document and creating a “copy” of that document with different period begin and end dates. Cloning can be done when a Manager (Rater) has multiple direct reports performing the same or similar duties or to save time and effort for the next evaluation cycle.

### Cloning a Performance Document

1. Manager (Rater) Navigates to: [myOhio.gov](http://myOhio.gov) > [Career Resources](#) > [Manager Tasks](#) > [ePerformance Performance Docs](#) > [Create Documents](#).
2. The Employee Reporting as of date will default to the current date, and only those employees that report to the Manager (Rater) as of that date will be displayed. You may leave the date as the default or, in the rare instance in which you need to create an evaluation for an employee that you no longer supervise, type an appropriate past date in the *Employee Reporting as of* field.

**NOTE:** Before a document can be Cloned, some evaluation criteria must be established in the original document. The document does not have to be marked Complete, but information must be entered in order for a “copy” to be made.

Canceled documents can be Cloned, but the ePerformance Administrator must Reopen the document first before the Manager (Rater) can clone it.

**NOTE:** Consider the instance of a Manager (Rater)’s promotion. The Manager (Rater) was promoted to a new position on September 1, 2012. In creating a performance document to evaluate an employee who previously reported to her, the Manager (Rater) enters an “As Of Date” of July 1, 2012, which is prior to her September 1 promotion.

#### Create Performance Documents

Create new performance documents for one or more of your employees.

##### Instructions

Follow this 3-step process to create performance documents for one or more of your employees:

1. Enter the date used to find the employees that report to you. You will be able to process only those employees that report to you as of this date.
2. Select the employees you are creating new performance documents for.
3. Enter the document details and select Create Documents.

##### Enter the as of date

Enter the effective date for determining your employees.

07/01/2012

The Manager (Rater) will be able to create a performance document for the employee, but the performance document will not be fully functional. To properly create the document, the employee’s current supervisor must be the Manager (Rater) and create the document, and then nominate both the previous supervisor and intended nominee to provide the employee’s evaluation.

- Click the checkbox in the Select column next to the identified Employee to create the performance document.
- Click the **Continue** button.

**Create Performance Documents**

**Employee Selection Criteria**  
Select the employees you are creating new performance documents for.

Employee Reporting as of 05/06/2014

CAROL Nelson's employees						Customize   Find   <input type="button" value="First"/> 1-2 of 2 <input type="button" value="Last"/>
Select	Name	Empl ID	HR Status	Job Title	Department	
<input checked="" type="checkbox"/>	DIEDRE Ferris	10038136	Active	Account Clerk 3	Copy Centers	
<input type="checkbox"/>	MARY Jones	10105126	Active	Account Clerk 3	Commercial Printing	

Select All Deselect All

- Type the following information:

- Period Begin Date:**  
1<sup>st</sup> day of the evaluation period
- Period End Date:** last day of the evaluation period
- Document Type:** select Ad Hoc Review, Annual Review or Probationary Review from the dropdown list
- Clone from Prior Document:** Click **Yes** from the dropdown list
- Prior Document:** Click the magnifying glass to select the document you will use to clone

**NOTE:** The chosen Period Begin/End dates must be *after* the dates on the original document. When cloning, documents created for multiple employees *must* use the same Period Begin and End Dates.

*Only the same document type can be cloned (i.e. annual to annual or probationary to probationary).*

**Create Performance Documents**

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then select the **Create Documents** pushbutton to generate documents for these employees.

**Document Creation Details**

Period Begin Date: 06/01/2014  Period End Date: 10/01/2014

Document Type: PROBATIONARY REVIEW

Clone from Prior Document: Yes

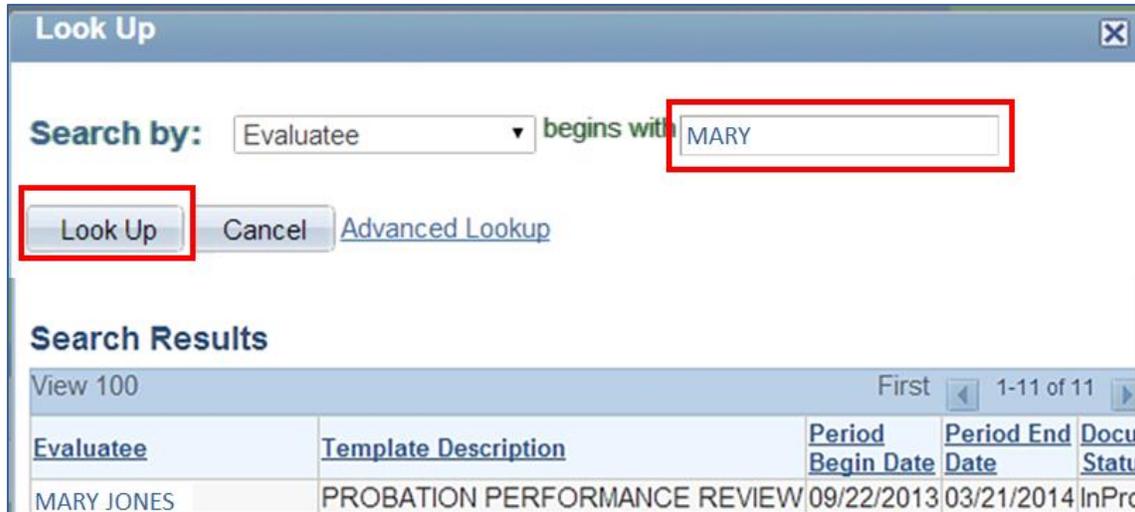
Prior Document:

**Selected Employees**

Employee ID	Last Name	First Name
	Ferris	DIEDRE

[Return to Select Employees](#)

- In the Look Up box, ensure “Evaluatee” is selected to search by, then type the employee’s first name from whose evaluation you wish to copy into the Search box. Click the **Look Up** button, then select the document you wish to clone.



**Look Up**

Search by: Evaluatee begins with

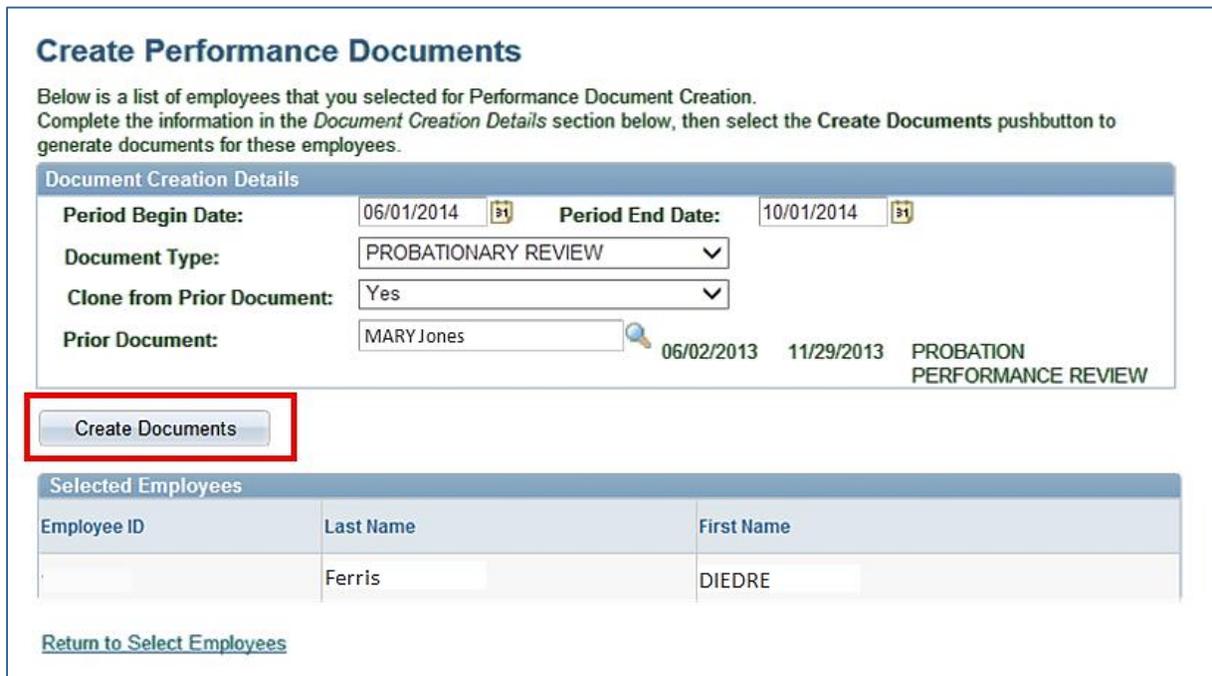
[Advanced Lookup](#)

**Search Results**

View 100 First 1-11 of 11

Evaluatee	Template Description	Period Begin Date	Period End Date	Docu Statu
MARY JONES	PROBATION PERFORMANCE REVIEW	09/22/2013	03/21/2014	InProc

- The employee name, along with the document type and period dates will populate the *Prior Document* field. Click the **Create Documents** button.



**Create Performance Documents**

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then select the **Create Documents** pushbutton to generate documents for these employees.

**Document Creation Details**

Period Begin Date: 06/01/2014 Period End Date: 10/01/2014

Document Type: PROBATIONARY REVIEW

Clone from Prior Document: Yes

Prior Document: MARY Jones 06/02/2013 11/29/2013 PROBATION PERFORMANCE REVIEW

**Selected Employees**

Employee ID	Last Name	First Name
	Ferris	DIEDRE

[Return to Select Employees](#)

After the document has been created, the **Create Performance Documents - Results** page will list the *Status* as “Document created successfully”.

**Create Performance Documents - Results**

Below is a list of employees you selected for Performance Document Creation and the results of the process. Employees with errors will need to be re-run after correcting the source of the error.

The "Current Documents" hyperlink at the bottom of the page can be used to access individual performance documents.

Selected Employees				
Employee ID	Name	Template	Successful Creation?	Status
	DIEDRE Ferris	PROBATION PERFORMANCE REVIEW	Yes	Document created successfully

Go To: [Create Documents](#)  
[Current Documents](#)

Once the Performance Document is cloned, a Manager (Rater) can now view the performance criteria for the document.

8. Navigate to the employee’s performance review: [myOhio](#) > [Career Resources](#) > [Manager Tasks](#) > [ePerformance Performance Docs](#) > [Current Documents](#).
9. Click the [Document Type](#) hyperlink for the applicable employee.

**Current Performance Documents**

Listed below are the current performance documents for which you are the Manager.

Performance Documents					
Employee	Document Type	Begin Date	End Date	Job Title	Status
DIEDRE Ferris	<a href="#">PROBATIONARY REVIEW</a>	06/01/2014	10/01/2014	Customer Service Assistant 1	In Progress

10. Click the **Start** hyperlink in the Next Action column on the *Establish Evaluation Criteria* step.

Document Progress				
Step		Status	Due Date	Next Action
Establish Evaluation Criteria	<input type="radio"/>	Not Started	11/30/2013	<a href="#">Start</a>
Nominate Participants	<input type="radio"/>	Not Started	09/01/2014	
Track Nominations	<input type="radio"/>	Not Started	09/01/2014	
Review Participant Evaluations	<input type="radio"/>	Not Started	09/01/2014	
Review Self Evaluation	<input type="radio"/>	Not Started	09/01/2014	
Complete Manager Evaluation	<input type="radio"/>	Not Started	09/16/2014	

[Return to Select Documents](#)

**NOTE:** Although the Document Details page looks as though the document is not populated, clicking on the **Start** hyperlink will trigger the Status Column on the *Establish Evaluation Criteria* step to change to *In Progress* and the Next Action will be *Complete*.

11. Click the **Expand All** link located above Section 1. Each of the Sections will be populated with the information contained in the original document.

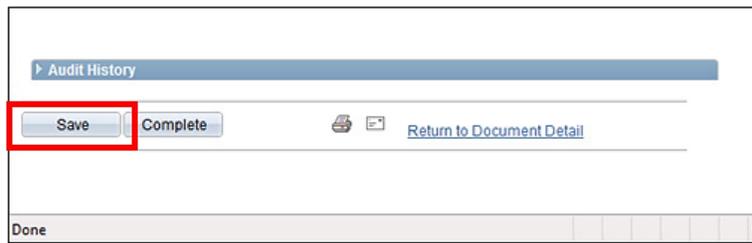
[Expand All](#)      [Collapse All](#)      [Expand Sections](#)

 **Section 1 - PURPOSE OF ORGANIZATION & POSITION**

To edit the information, click the  icon to the right of the Description. To delete the information, click the  icon.



12. After all edits have been made to the evaluation criteria, Click the **Save** button.

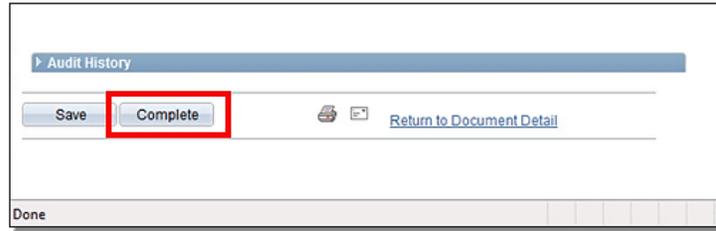


**NOTE:** Once the document is saved, the entered criteria become available for the employee to view. The ePerformance tool will allow the Manager (Rater) to make changes to the employee’s evaluation criteria or add new criteria throughout the year, as long as the changes are **Saved**. Once the **Complete** button is selected, changes can only be made to the criteria by clicking the document’s **Reopen** button. This button will only appear once the **Complete** button has been clicked, but before any ratings have been done. It is recommended that the **Complete** button is not selected until the performance evaluation rating process is ready to begin.

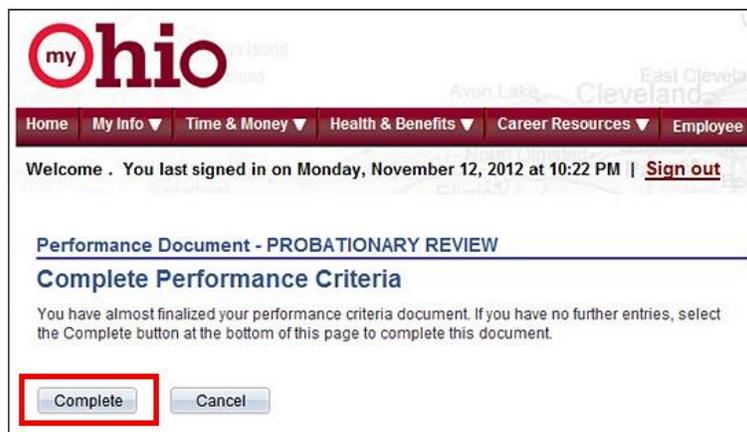
To provide employees with directions on how to view competencies, goals and performance expectations, refer to the “Employee Views Performance Criteria” Job Aid.



13. Once you are ready to begin rating employee performance, click the **Complete** button to finalize all criteria.



14. Click the **Complete** button again.



Notice that the Document Details page now reflects that the *Establish Evaluation Criteria* step is Completed and the Next Action column displays the **Start** hyperlink on the Complete Manager Evaluation Step.

**Current Performance Documents**

**Document Details**

DIEDRE FERRIS, Customer Service Assistant 1  
 PROBATIONARY REVIEW: 06/01/2014 - 10/01/2014

You have successfully completed the Establish Criteria step.

**Performance Document Details**

<b>Employee:</b>	DIEDRE FERRIS	<b>Job Title:</b>	Customer Service Assistant 1
<b>Document Type:</b>	PROBATIONARY REVIEW	<b>Period:</b>	06/01/2014 - 10/01/2014
<b>Template:</b>	PROBATION PERFORMANCE REVIEW	<b>Document ID:</b>	41020
<b>Manager:</b>	LISA BAKER	<b>Status:</b>	In Progress

**Document Progress**

Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔ Completed	11/30/2013	<a href="#">View</a>	
Nominate Participants	○ Not Started	09/01/2014		<a href="#">Start</a>
Track Nominations	○ Not Started	09/01/2014		
Review Participant Evaluations	○ Not Started	09/01/2014		
Review Self Evaluation	○ Not Started	09/01/2014		
Complete Manager Evaluation	○ Not Started	09/16/2014		<a href="#">Start</a>

[Return to Select Documents](#)