

2016

Deleting a Document

ePERFORMANCE ADMINISTRATOR



Deleting a Document

After a performance or development document has been Canceled, it may be Deleted from the ePerformance system. Deleting is the permanent removal of a document from the ePerformance system. It is a function of the ePerformance Administrator and should only be done under certain circumstances.

NOTE: It is important to remember that a document must first be Canceled in ePerformance before it can be Deleted.

Some common examples are:

CANCEL		DELETE
Review Period start/end dates have been entered incorrectly	→→	Only if no content, or minimal content has been entered; otherwise retain as a Canceled document for 6 years before deleting
Evaluation Criteria marked as Complete; ratings have been made, but changes may be needed	→→	Only if no content, or minimal content has been entered; otherwise retain as a Canceled document for 6 years before deleting
Evaluation Template selected was incorrect (Modified or Executive)	→→	Only if no content, or minimal content has been entered; otherwise retain as a Canceled document for 6 years before deleting
Employee is on extended leave (e.g., Disability)	<input checked="" type="checkbox"/>	Do Not Delete – document can be reopened upon employee’s return from leave
A test document was created for training/demonstration purposes	→→	OK to delete
Employee terminated before document marked as Complete	→→	Retain for 6 years before Deleting

Regardless of the reason, **a Deleted document cannot be reopened, viewed, or recovered** in the ePerformance system.

1. ePerformance Administrator Navigates to: [myOhio > Launch HCM > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Delete Document](#).

NOTE: You can also Delete Development Documents by navigating to: [myOhio > Launch HCM > Workforce Development > Performance Management > Development Documents > Administrative Tasks > Delete Document](#) and then following the rest of the steps shown here.

- Using the *Search for Documents* fields, type the name of the employee whose document will be Deleted and click the **Search** button.

Delete Documents

To delete a performance document, select the checkbox next to the Employee's Name and then select the Continue push button. Only "Cancelled" performance documents can be deleted.

Search for Documents

Employee First Name: Last Name:

Manager First Name: Last Name:

Document Type: Status:

Period Between:  

- Click the checkbox next to the *Employee* name and associated *Document Type* which is to be Deleted.
- Click the **Continue** button.

Performance Documents							
Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager	
<input type="checkbox"/>	DIEDRE Ferris	ANNUAL REVIEW	11/01/2012	10/31/2013	Customer Service Assistant 1	In Progress	LISA Baker

Select All Deselect All

- Confirm the Deletion by clicking the **Save** button.

Delete Documents

Confirm Delete

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
	DIEDRE Ferris	ANNUAL REVIEW	11/01/2012	10/31/2013	Customer Service Assistant 1	Cancelled	LISA BAKER

You have chosen to delete the performance documents indicated above.
 To confirm this delete, select the Save button.

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6. Click the **OK** button.

