

2016

# Transferring a Document

ePERFORMANCE ADMINISTRATOR



## Transferring a Document

During the course of a performance or development document, the documents may need to be transferred to another Manager (Rater). Transferring a document means that the ePerformance Administrator has transferred the document to a different Manager (Rater) and the original Manager (Rater) will no longer be able to rate and comment on the Employee’s performance or development. The Manager (Rater) receiving the transferred document becomes responsible for completing the document and conducting the face-to-face performance evaluation with the employee. For example, this may happen when there is a reassignment of the employee within the agency, the original Manager (Rater) position is vacant, or the original Manager (Rater) is out of the office for an extended period of time.

**NOTE:** Manager (Rater) view is limited to documents that he/she owns. The Manager (Rater) cannot search for other documents.

1. ePerformance Administrator Navigates to:  
[myOhio > Launch HCM > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Transfer Document.](#)
2. Using the *Search for Documents* fields, type the name of the employee whose document will be transferred and click the **Search** button.

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

### Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

**Search for Documents**

Employee First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Manager First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Document Type:	<input type="text" value="▼"/>	Status:	<input type="text" value="▼"/>
Period Between:	<input type="text"/> 		<input type="text"/> 

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

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 **Continue**

- Click the **Continue** button.
- Click the Select a Manager hyperlink.

### Transfer Document

#### Confirm Transfer

Performance Documents					
Employee	Document Type	Begin Date	End Date	Job Title	Status
DIEDRE Ferris	ANNUAL REVIEW	11/12/2012	12/31/2012	Customer Service Assistant 1	In Progress

You have chosen to transfer the document indicated above to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

New Manager ID: [Select a Manager](#)

- Using the Search Criteria and Results box, type the name of the person the document is to be transferred to and click Search.

### Person Search - Simple

Search Criteria and Results

**Instructions**

**Search Criteria**

Name:

Last Name:

First Name:

ACName:

4. In the *Search Results*, click the Radio button next to the employee.

**Person Search - Simple**  
Search Criteria and Results

Instructions

**Search Criteria**

Name: JANELLE  
Last Name: SMITH  
First Name:  
ACName:

Search

**Search Results**

JANELLE Smith i

OK

[Return to Previous Page](#)

**NOTE:** To view additional information about nominated participant, click the i icon next to his or her name. The resulting information is illustrated below:

**Person Search - Simple**  
Details for JANELLE Smith

**Data**

Description: Employee

**Data**

Type: EMP Active  
Department: TAX210300 Audit-South Central Region  
Location: TAXTEL Telecommuting Employee

Select This Person [Return to List](#)

5. Click the **OK** button.

- Click the **Save** button on the *Confirm Transfer* page.

**Transfer Document**

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**Confirm Transfer**

Performance Documents Customize | Find |  | First 1 of 1 Last

Employee	Document Type	Begin Date	End Date	Job Title	Status
DIEDRE Ferris	ANNUAL REVIEW	11/12/2012	12/31/2012	Customer Service Assistant 1	In Progress

You have chosen to transfer the document indicated above to another manager.  
Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

**New Manager ID:** JANELLE Smith  
[Select a Manager](#)

[Return to Previous Page](#)

**NOTE:** Notice that the **New Manager ID** now says JANELLE Smith.

- Click the **OK** button.

**Transfer Document**

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**Save Confirmation**

✓ The Save was successful.