



Canceling and Reopening a Document

ePERFORMANCE ADMINISTRATOR

Canceling and Reopening a Document

During the life cycle of a performance or development document, the documents may need to be Canceled. Canceling a document is primarily a function of the ePerformance Administrator and can be done for a variety of reasons. Some common examples are:

- the Review Period start/end dates may have been entered incorrectly;
- the Evaluation Criteria was marked Complete, Ratings have been made, but changes may be needed;
- the Evaluation Template used was incorrect (e.g., Modified or Executive);
- the Employee is on extended leave (e.g., Disability);
- a test document was created for training purposes; or
- the Employee was terminated before the document was marked Complete.

Regardless of the reason, a Canceled document will remain in the ePerformance system and can be Reopened by the ePerformance Administrator at any time.

Cancel a Document

1. ePerformance Administrator navigates to:
myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Cancel Document.
2. Using the *Search for Documents* fields, type the name of the employee whose document will be Canceled and click the **Search** button.

NOTE: You can also Cancel Development Documents by navigating to: *myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > Cancel Document* and then following the rest of the steps shown here.

Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be cancelled except for already "Cancelled" performance documents.

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"/>	Status:	<input type="text"/>
Period Between:	<input type="text"/>		<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>			

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

Performance Documents							Customize Find First 1 of 1 Last
	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**

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

Cancel Document
Confirm Cancellation

Performance Documents							Customize Find First 1 of 1 Last
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 Asst 1	In Progress	LISA BAKER

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

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- Click the **OK** button.

Cancel Document
Save Confirmation

✓ The Save was successful.

OK

Reopen a Document

1. ePerformance HR Administrator Navigates to:
[myOhio > Quick Icons \(Four-Square symbol\) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Performance Documents > Administrative Tasks > Reopen Document](#).
2. Using the *Search for Documents* fields, type the name of the employee whose document will be Reopened and click the **Search** button.

NOTE: You can also Reopen Development Documents by navigating to: [myOhio > Quick Access \(Four-Square symbol\) > HCM > Launch App > Main Menu > Workforce Development > Performance Management > Development Documents > Administrative Tasks > Reopen Document](#) and then following the rest of the steps shown here.

Reopen Document

To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name 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"/>	Status:	<input type="text"/>
Period Between:	<input type="text"/>		<input type="text"/>

3. Click the checkbox next to the *Employee* name and associated *Document Type* which is to be Reopened.
4. Click the **Continue** button.

Performance Documents								Customize	Find	First	1 of 1	Last
	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 <input type="button" value="Continue"/>												

5. Confirm the Reopening by clicking the **Save** button.

Reopen Document

Confirm Reopen Document

Performance Documents							
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 Asst1	Cancelled	LISA BAKER

You have chosen to change the status of the performance document indicated above. The status will be changed to **In Progress**.
Note that changing the status of an Employee's self-evaluation will not change the status of the overall document. To change the overall document status, you must change the status of the Manager's document.

To confirm this status change, select the **Save** button.

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6. Click the **OK** button.

Reopen Document

Save Confirmation

✓ The Save was successful.