Canceling and Reopening a Document

ePERFORMANCE ADMINISTRATOR

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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.
3. Click the checkbox next to the Employee name and associated Document Type which is to be Canceled.

4. Click the Continue button.

5. Confirm the Cancellation by clicking the Save button.

6. Click the OK button.
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.

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

4. Click the Continue 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.
5. Confirm the Reopening by clicking the **Save** button.

![Confirm Reopen Document](image)

6. Click the **OK** button.

![Save Confirmation](image)