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.

1. ePerformance Administrator Navigates to:
   - myOhio > Quick Icons (Four-Square symbol) > HCM > Launch App > Main Menu > 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.

Transfer Document

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

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

NOTE: You can also transfer Development Documents by navigating to: myOhio > Quick Access (Four-Square Icon) > HCM > Launch App > Main Menu > Workforce Development > Performance Management> Development Documents > Administrative Tasks > Transfer 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 transferred.

4. Click the Continue button.

5. Click the Select a Manager hyperlink.

6. Using the Search Criteria and Results box, type the name of the person the document is to be transferred to and click Search.
4. In the *Search Results*, click the Radio button next to the employee.

![Person Search - Simple](image)

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

![Person Search - Simple](image)

5. Click the *OK* button.
6. Click the **Save** button on the **Confirm Transfer** page.

![Transfer Document](image)

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.

![Save Confirmation](image)

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

7. Click the **OK** button.