ePerformance

Step-by-Step Help Guide

Transfer Performance Evaluation

1: Overview
2: Transfer a Performance Evaluation to a Designee (Delegate)
3: Complete a Transferred Performance Evaluation
4: Transfer a Performance Evaluation back to the Manager

Effective April 2014
1: Overview

The Transfer Document feature in ePerformance gives a manager the option to transfer the completion of an employee’s performance evaluation to someone else. To use this feature, the manager temporarily transfers ownership of an employee’s review document to a designee (delegate). The manager creates the performance document before transferring it. The designee (delegate) will receive notification that a review has been transferred for completion. The designee (delegate) completes the employee’s review and then transfers it back to the manager to finalize. The manager can then complete the next steps in the process, which include entering the merit (if applicable), submitting for approval, and finalizing the evaluation. While the evaluation is being completed by the designee (delegate), the manager will have view-only access to the document.

Click here for an overview of all Roles and Definitions in the ePerformance process. Click here to see a checklist and recommended timeline for completing the review.

Tips to keep in mind about the transfer document feature:

Manager

- Be sure the designee you assign to complete an employee’s evaluation is someone with first-hand knowledge about the employee’s job and performance.
- Let the designee know in advance that they will be responsible for completing a review.
- Make sure the designee reviews instructions and help guides in order to know how to complete the evaluation.
- Check the name and correct spelling of the designee who will complete the review so that it is transferred to the right person.
- Leave enough time after the review is transferred back from the designee to get approvals and finalize the evaluation.

Designee (Delegate)

- Review instructions and help guides in advance to learn how to complete an evaluation.
- Identify peers to get feedback (optional).
- Check the name and correct spelling of peers you will request feedback from so the right person is notified.
- Check with the manager to find out when to transfer the review back, in order to finalize the process.
2: Transfer a Performance Evaluation to a Designee (Delegate)

Before transferring a performance document to a designee (delegate), the manager must first create the performance document for the employee’s review.

After confirming that the employee’s evaluation has been created, the manager can begin the Transfer Document function by selecting the Transfer Document link, which is available from the manager’s Performance Management Home page.

It is a good idea for the manager to communicate with the designee (delegate) before beginning this step to let them know they will be responsible for completing the review and to confirm they have reviewed help guides and other resources.
2: Transfer a Performance Evaluation to a Designee (continued)

The manager selects the employee whose review will be transferred by clicking the box to the left of the Employee name and ID. After selecting the employee, the manager clicks on the Continue button.
2: Transfer a Performance Evaluation to a Designee (continued)

The manager next selects the name of the person to whom the document will be transferred and who will complete the performance document for the manager. When this step is complete, the manager will have temporarily transferred ownership of the document to the designee (delegate). The designee (delegate) will then be responsible for completing the performance document and transferring it back to the manager to finalize. The manager will have view-only access to the document and will not be able to edit or change it until the designee (delegate) transfers it back.

To search for and select a designee (delegate) to transfer the performance document to, the manager clicks on the link at the bottom of the Confirm Transfer page.
2: Transfer a Performance Evaluation to a Designee (continued)

The manager enters the name of the designee (delegate) to transfer the performance document to in the search criteria and selects the search button.

Reminder: The manager is responsible for selecting the correct person to transfer the review to. If the search produces multiple results because of a shared last name, for example, the manager must select the correct person. It is a good idea for the manager to verify in advance the name of the person to whom the review is to be transferred. Once the review is transferred to a new owner, the manager will no longer be able to access or edit the document until it is transferred back.

NOTE: If a manager transfers a performance document to the wrong person, Human Resources can transfer it back to the manager.

TIPS
- Verify spelling of names, especially common last names, before searching.
- Make sure the right person is selected as a designee.
- The manager will have view-only access to the document after transferring it.
2: Transfer a Performance Evaluation to a Designee (continued)

After reviewing and confirming the search results, the manager selects the correct name in the Search Results box. By clicking on the icon to the right of the employee name listed, the manager can view data about the employee to assist in confirming that this is the person to whom the manager will transfer the review.

To confirm that this is the person who will become the new owner of the performance document and who will complete the review on the manager’s behalf, the manager selects the OK button.

Select this icon to review data about the employee listed to assist in confirming that this is the correct person to whom to transfer the review.
2: Transfer a Performance Evaluation to a Designee (continued)

The designee’s (delegate’s) name appears at the bottom of the document as the New Owner of the document. If the name that appears is not correct, go back to choose another person. If the name of the new owner is correct, click the Save button to save the selection. Once the transfer is saved, the performance document is transferred to the designee (delegate) and the manager will have view-only access to it.

Clicking on the Save button will confirm the transfer.

The New Owner is the name of the designee (delegate), the employee to whom the manager has transferred the review.

If the name of the New Owner is not correct, click here to go back and choose a different person to whom to transfer the review.

Click the Save button to finalize the transfer after confirming the correct employee was selected as the designee (delegate). After saving, the designee (delegate) will receive an email notification and the manager has view-only access to the review document.
2: Transfer a Performance Evaluation to a Designee (continued)

The transfer is saved and confirmed. The manager selects the OK button to continue.

The designee (delegate) will receive an automatic email notification that a document has been transferred for completion (see below for sample text of the notification).

It is a good idea for the designee (delegate) to check with the manager to find out when the document should be returned for completion. The due date in the notification is the date the review needs to be finalized and the manager will need time prior to this date to finalize it.

Notification sent to the designee (delegate) when a performance document has been transferred:

This automatic notification is to alert you that responsibility for an in-process Annual Performance Review performance document for (Employee’s Name & ID) has been transferred to you. This document covers the period beginning (beginning date) and ending (end date). The completed and approved document is due by (due date). (Please do not respond to this automatic notification.)
2: Transfer a Performance Evaluation to a Designee (continued)

The name of the designee (delegate) will be listed under the Manager column until the evaluation is transferred back to the manager. The manager will have view-only access to the employee’s evaluation while it is in progress and being completed by the designee (delegate).


NOTE: If a performance evaluation has been transferred to the wrong person, or in error, contact Human Resources for options.
3: Complete a Transferred Performance Evaluation

A designee (delegate) assumes the role of the manager temporarily when a performance evaluation has been transferred to complete. The designee (delegate) can nominate peers to obtain feedback regarding the employee’s performance and complete the evaluation online. Within the ePerformance process the designee (delegate) assumes the role of the manager and completes the following steps:

Step 3: Gather Review Information
Step 4: Complete the Review Online*

*The document must be transferred back to the employee’s manager to enter the merit and submit the review for approval. Click here for a Manager Overview of ePerformance.

It is a good idea for the designee (delegate) to check with the manager before beginning a review to confirm expectations and details regarding the timeline for completing it and transferring it back to the manager to complete.

The Performance Management section of the Employee Performance Evaluations Home:
Performance Management Overview: Videos, help guides, and other resources about the ePerformance process.
Performance Documents: Link to the review documents that have been transferred to the designee to complete in ePerformance.
Transfer Document: Link to transfer a completed review document back to the manager.
4: Transfer a Performance Evaluation Back to the Manager

After completing the employee’s performance evaluation in ePerformance, the designee (delegate) transfers it back to the manager to finalize. After the review is transferred back to the manager, the designee will no longer be able to review or edit the document. The designee can only transfer the document back to the employee’s manager and not to another employee.

To begin to transfer the evaluation back, the designee clicks on the Transfer Document link on the Employee Performance Evaluations Home page.
4: Transfer a Performance Evaluation Back to the Manager (continued)

On the Transfer Document page, the designee can search for and select the employee whose review will be transferred back to the manager. To select the employee, click the checkbox to the left of the employee whose evaluation will be transferred back to the manager and then click on the Continue button.
4: Transfer a Performance Evaluation Back to the Manager (continued)

The designee can only transfer the completed review back to the employee’s manager. The manager’s name will be listed as the New Owner. The designee will not be able to select or search for any other employee to transfer the evaluation back to.

The designee confirms that the review document is to be transferred back to the manager by clicking on the Save button.
4: Transfer a Performance Evaluation Back to the Manager (continued)

After the document transfer is completed and confirmed, the performance document is no longer available to the designee (delegate) and will not be viewable in their list of performance documents. The performance document will be available to the employee’s manager to finalize.

It is a good idea for the designee to communicate back to the manager that the employee’s review has been transferred back once this step is completed. The manager can then begin the next steps in the review process.