

Department Admin Transfers an Evaluation

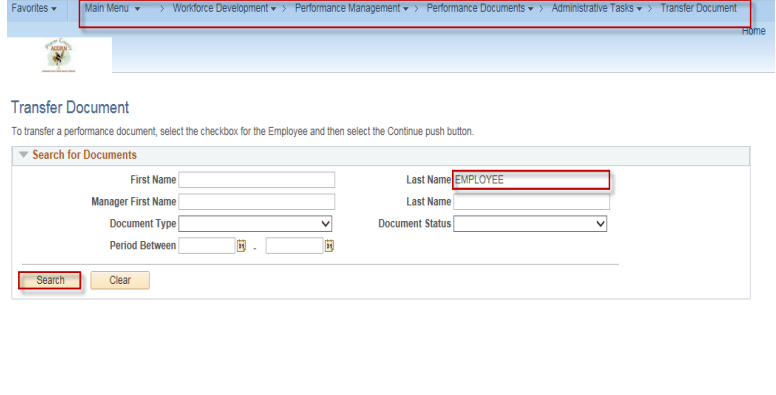
Navigation: Main Menu>Workforce Development>Performance Management>Performance Documents>Administrative Tasks>Transfer Document

Instructions

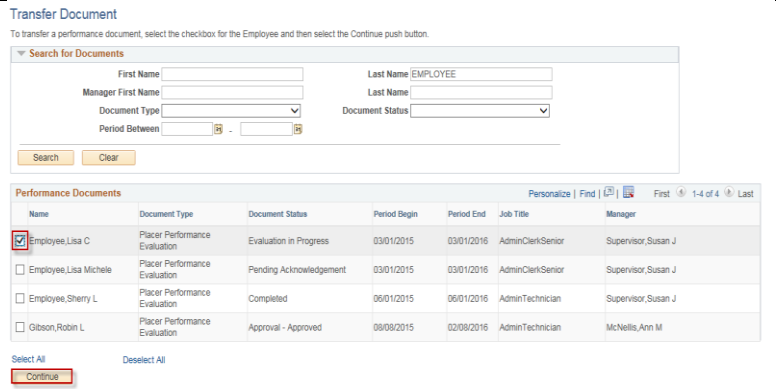
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PURPOSE: Department Admins can transfer evaluations within their department that have not been completed or cancelled. When an evaluation is transferred, the receiving Supervisor is notified via e-mail and the original Supervisor no longer has access to that evaluation. The steps listed below demonstrate transferring an evaluation by the Department Admin.

1. Navigate to **Main Menu>Workforce Development>Performance Management>Performance Documents>Administrative Tasks>Transfer Document**. Search for the Employee's evaluation by specifying search criteria. Typically the Last Name is used. Click the "Search" button.

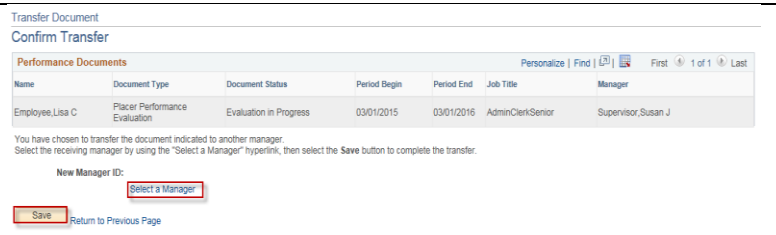


2. Click the check box for the evaluation you would like to transfer. Click the "Continue" button.



Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input checked="" type="checkbox"/> Employee, Lisa C	Placer Performance Evaluation	Evaluation in Progress	03/01/2015	03/01/2016	AdminClerk/Senior	Supervisor, Susan J
<input type="checkbox"/> Employee, Lisa Michele	Placer Performance Evaluation	Pending Acknowledgement	03/01/2015	03/01/2016	AdminClerk/Senior	Supervisor, Susan J
<input type="checkbox"/> Employee, Sherry L	Placer Performance Evaluation	Completed	06/01/2015	06/01/2016	AdminTechnician	Supervisor, Susan J
<input type="checkbox"/> Gibson, Robin L	Placer Performance Evaluation	Approval - Approved	08/08/2015	02/08/2016	AdminTechnician	McNellis, Ann M

3. Click the "Select a Manager" to identify the receiving Supervisor.



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<p>4. Enter the new Supervisor's Last Name and click the "Search" button.</p>	<p>Person Search Search Criteria and Results</p> <p>▶ Instructions</p> <p>Search Criteria</p> <p>Name <input type="text"/></p> <p>Last Name <input type="text" value="supervisor"/></p> <p>Second Last Name <input type="text"/></p> <p>First Name <input type="text"/></p> <p>ACName <input type="text"/></p> <p><input type="button" value="Search"/></p> <p>Return to Previous Page</p>														
<p>5. Select the desired Supervisor's name. Click the "OK" button.</p>	<p>Person Search Search Criteria and Results</p> <p>▶ Instructions</p> <p>Search Criteria</p> <p>Name <input type="text"/></p> <p>Last Name <input type="text" value="SUPERVISOR"/></p> <p>Second Last Name <input type="text"/></p> <p>First Name <input type="text"/></p> <p>ACName <input type="text"/></p> <p><input type="button" value="Search"/></p> <p>Search Results</p> <p><input checked="" type="radio"/> Supervisor, Kelly R i</p> <p><input type="radio"/> Supervisor, Monique E i</p> <p><input type="radio"/> Supervisor, Susan J i</p> <p><input type="button" value="OK"/></p> <p>Return to Previous Page</p>														
<p>6. Confirm the appropriate "New Manager ID" is correct, then click the "Save" button to complete the evaluation transfer.</p>	<p>Transfer Document Confirm Transfer</p> <p>Performance Documents Personalize Find First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Document Type</th> <th>Document Status</th> <th>Period Begin</th> <th>Period End</th> <th>Job Title</th> <th>Manager</th> </tr> </thead> <tbody> <tr> <td>Employee, Lisa C</td> <td>Placer Performance Evaluation</td> <td>Evaluation in Progress</td> <td>03/01/2015</td> <td>03/01/2016</td> <td>AdminClerk/Senior</td> <td>Supervisor, Susan J</td> </tr> </tbody> </table> <p>You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.</p> <p>New Manager ID: <input type="text" value="Supervisor, Kelly R"/> Select a Manager</p> <p><input type="button" value="Save"/> Return to Previous Page</p>	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	Employee, Lisa C	Placer Performance Evaluation	Evaluation in Progress	03/01/2015	03/01/2016	AdminClerk/Senior	Supervisor, Susan J
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<p>7. A confirmation window will appear. Click the "OK" button. The new Supervisor will be notified via e-mail of the evaluation.</p>	<p>Transfer Document Save Confirmation</p> <p><input checked="" type="checkbox"/> The Save was successful.</p> <p><input type="button" value="OK"/></p>														