1.0 SCOPE

1.1 This procedure describes the steps necessary to transfer an employee's performance evaluation document to another manager/evaluator using the PeopleSoft ePerformance module.

2.0 RESPONSIBILITY

2.1 The school principal or department manager has the ultimate responsibility to ensure that all performance evaluation steps for all District personnel at his/her school or department are completed in a timely fashion. Some portions of the process, at the discretion of either the principal/manager and/or teacher/employee (and per the terms of the respective bargaining unit CBA's), may be completed by someone other than the principal/manager.

3.0 APPROVAL AUTHORITY

3.1 Once the principal/manager completes the employee evaluation, there is no additional approval process within the PeopleSoft ePerformance system.

4.0 DEFINITIONS

4.1 **Transfer:** the PeopleSoft process used to assign responsibility for an employee evaluation to another manager or evaluator.

4.2 **Evaluator:** a principal, manager or other designated person who will complete an employee evaluation. This person is responsible for completing the *Manager Evaluation* step in the PeopleSoft system and for marking the performance document as completed.

5.0 PROCEDURE

5.1 **Transfer a document.** Navigate to the transfer function as shown from the PeopleSoft Main Menu: **Manager Self-Service > Performance Management > Performance Documents > Administrative Tasks > Transfer Documents**.

Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button. Only current documents can be transferred.

Documents you own   Customize | Find | | First   1-8 of 8   Last

	Employee	Document Type	Begin Date	End Date	Job Title	Status
☑	Will E. Coyote	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
☐	Fred Flintstone	Formal Observation	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
☐	Fred Flintstone	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
☐	Wilma Flintstone	RTA	10/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
☐	Tyranus Rex	Civil Service	07/01/2011	06/30/2012	Custodian Engineer	In Progress
☐	Barney Rubble	Civil Service	09/01/2011	06/30/2012	Asst User Suppt Instructor I	In Progress
☐	Betty Rubble	Civil Service	09/01/2011	06/30/2012	Tchr-on-Assignment	In Progress

Select All   Deselect All   [Continue]

5.2 Select the documents for the Employee(s) you wish to transfer to a specified evaluator. A check mark will appear once a performance document has been selected. Click the **Continue** button once all performance documents to transfer to the same evaluator have been selected.

Transfer Document

Confirm Transfer

Documents you own   Customize | Find | | First   1 of 1   Last

Employee	Document Type	Begin Date	End Date	Job Title	Status
Will E. Coyote	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress

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.

New Manager ID:

Select a Manager

[Save]   Return to Previous Page

5.3 Click the **Select a Manager** link to transfer the document(s).

5.4 The *Person Search – Simple* window will appear as shown below.

Person Search - Simple
Search Criteria and Results

▶ Instructions

Search Criteria

Name:	
Last Name:	
First Name:	
ACName:	

Search

Return to Previous Page

5.4.1　Enter the new evaluator's Last Name in the *Last Name* field. If you are unsure of the spelling of the name of the new evaluator, type the portion of the name that you do know followed by the % sign.

5.4.2　Enter the new evaluator's First Name in the *First Name* field.

5.4.3　Click on the **Search** button. The matching results will be displayed in the *Search Results* section of the page.

Person Search - Simple
Search Criteria and Results

▶ Instructions

Search Criteria

Name:	
Last Name:	Roadrunner
First Name:	Roger
ACName:	

Search

Search Results

⊙	Roger Roadrunner	ⓘ

OK

Return to Previous Page

5.4.4　Select the correct employee by clicking the radio button next to the employee's name in the *Search Results* section of the page. If more than one person is found that matches your search criteria, click on the information ⓘ icon to display additional information to assist with your selection.

5.4.5　Click the **OK** button to proceed with the performance document transfer.

Transfer Document

Confirm Transfer

Documents you own					Customize | Find |	First 1 of 1 Last
Employee	**Document Type**	**Begin Date**	**End Date**	**Job Title**	**Status**	
Will E. Coyote	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress	

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.

New Manager ID: Roger Roadrunner
Select a Manager

Save   Return to Previous Page

5.5 Click the **Save** button to confirm the selection of the *New Manager ID*.

Transfer Document

Save Confirmation

✔ The Save was successful.

OK

5.6 Click the **OK** button to complete the transfer process.

5.7 Congratulations! You have successfully transferred a performance document to another evaluator. If you have no more evaluation documents to transfer, click on the **Home** link to return to your PeopleSoft main menu.

6.0 ASSOCIATED DOCUMENTS

6.1 None.

7.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft ePerformance initial implementation.	SharePoint ePerformance project site.	Until Superceded		N/A

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/9/2012	Original	Original Document
5/17/12	Civil Service	Added Civil Service Doc Type

End of Procedure