

ePerformance
Step-by-Step Help Guide
Transfer Performance Evaluation

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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.

Performance Management Home

Prepare

- [Performance Management Overview](#)
- [Performance Reviews Due](#)
View employees past due for an evaluation or due within the next 30 days.
- [Departmental Goals](#)
Set and review goals for your departments.
- [Validate Your Job Descriptions](#)
Review job description for all positions that report to you.
- [Enter Performance Notes](#)

Complete Performance Review

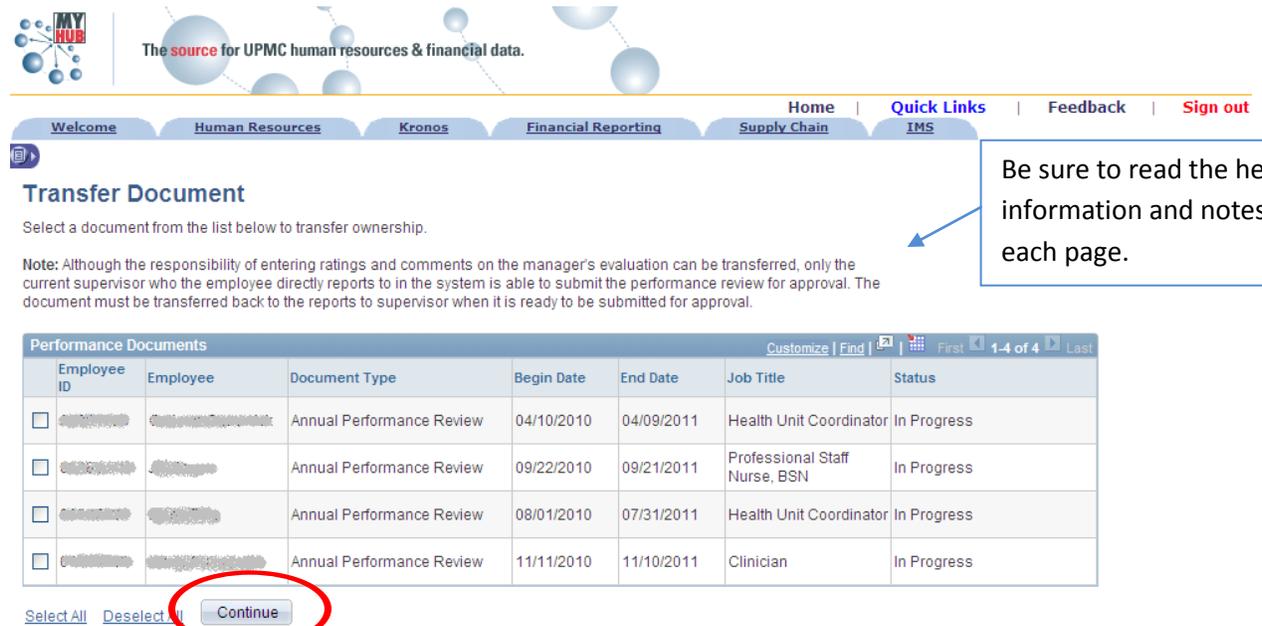
- [Begin Performance Review / Merit Increase](#)
Select an employee to submit for a performance review, merit increase, or a six month review.
- [View Performance Documents](#)
View previous reviews that you have completed, are tied to your current employees, or have been forwarded for your review.
- [Return to Current Performance Documents](#)
Return to a performance document that you have created and is currently in progress.
- [Transfer Document](#)
Transfer Ownership of a performance document to someone else

Approve

- [Monitor Approvals \(Worklist\)](#)
Allows you to approve/deny transactions that are pending your approval. You are also able to search for transactions that you have previously submitted or have previously approved or denied.

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.



Transfer Document

Select a document from the list below to transfer ownership.

Note: Although the responsibility of entering ratings and comments on the manager's evaluation can be transferred, only the current supervisor who the employee directly reports to in the system is able to submit the performance review for approval. The document must be transferred back to the reports to supervisor when it is ready to be submitted for approval.

Performance Documents							Customize Find
Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status	First 1-4 of 4 Last
<input type="checkbox"/>	[Redacted]	Annual Performance Review	04/10/2010	04/09/2011	Health Unit Coordinator	In Progress	
<input type="checkbox"/>	[Redacted]	Annual Performance Review	09/22/2010	09/21/2011	Professional Staff Nurse, BSN	In Progress	
<input type="checkbox"/>	[Redacted]	Annual Performance Review	08/01/2010	07/31/2011	Health Unit Coordinator	In Progress	
<input type="checkbox"/>	[Redacted]	Annual Performance Review	11/11/2010	11/10/2011	Clinician	In Progress	

Select All Deselect **Continue**

Be sure to read the help information and notes on each page.

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.

The screenshot shows the 'MY HUB' interface with a navigation bar containing 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', 'Supply Chain', and 'IMS'. The main content area is titled 'Transfer Document' and 'Confirm Transfer'. It features a table of 'Performance Documents' with the following data:

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status
[Redacted]	[Redacted]	Annual Performance Review	11/11/2010	11/10/2011	Clinician	In Progress

Below the table, there is a 'New Owner:' field with a redacted name. A red circle highlights a link that says 'Click here to choose a different person.' A blue arrow points from a text box to this link. The text box contains the following text:

To continue with the transfer document process and select a delegate (designee) to transfer the document to, click this link.

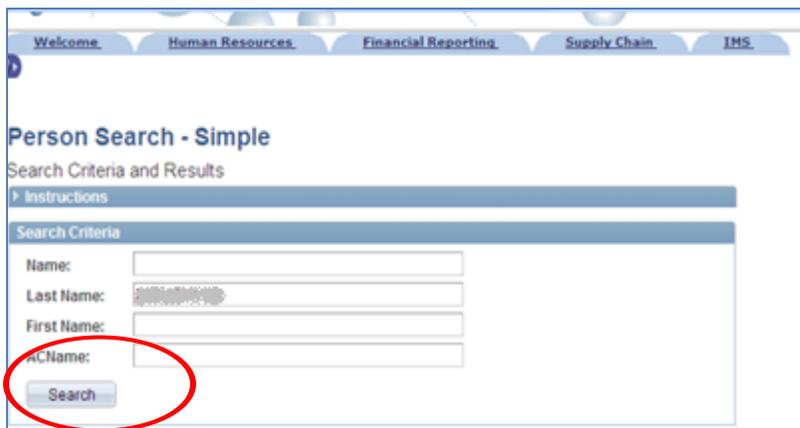
Other elements on the page include a 'Save' button and a 'Return to Previous Page' link.

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 to 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.



The screenshot shows a web application interface for a 'Person Search - Simple' form. At the top, there are navigation tabs: 'Welcome', 'Human Resources', 'Financial Reporting', 'Supply Chain', and 'IMS'. Below the tabs, the title 'Person Search - Simple' is displayed. Underneath, there is a section for 'Search Criteria and Results'. A sub-section titled 'Instructions' is visible. The main 'Search Criteria' section contains four input fields: 'Name:', 'Last Name:', 'First Name:', and 'ACName:'. The 'ACName:' field is circled in red. Below the input fields is a 'Search' button, which is also circled in red.

✓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.

The screenshot displays the 'Person Search - Simple' interface. At the top, there are navigation tabs for 'Welcome', 'Human Resources', 'Financial Reporting', 'Supply Chain', and 'IMS'. The main heading is 'Person Search - Simple'. Below this, there is a 'Search Criteria and Results' section. The 'Search Criteria' section includes input fields for 'Name', 'Last Name', 'First Name', and 'ACName', along with a 'Search' button. The 'Search Results' section shows a table with one entry. An information icon (i) is located to the right of the entry name. A blue circle highlights this icon, and an arrow points from a text box to it. Below the search results, there is an 'OK' button circled in red, and a 'Return to Previous Page' link.

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 source for UPMC human resources & financial data.

Welcome Human Resources Kronos Financial Reporting Home Quick Links Feedback Sign out
Supply Chain IMS

Transfer Document

Confirm Transfer

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status
		Annual Performance Review	11/11/2010			

You have chosen to transfer the document indicated above to another manager.

Note: If you are not the employee's current reports to supervisor, you can only transfer document back to that person, who is listed below.

Click the Save button to complete the transfer.

New Owner: [Name]
[Click here to choose a different person](#)

Save [Return to Previous Page](#)

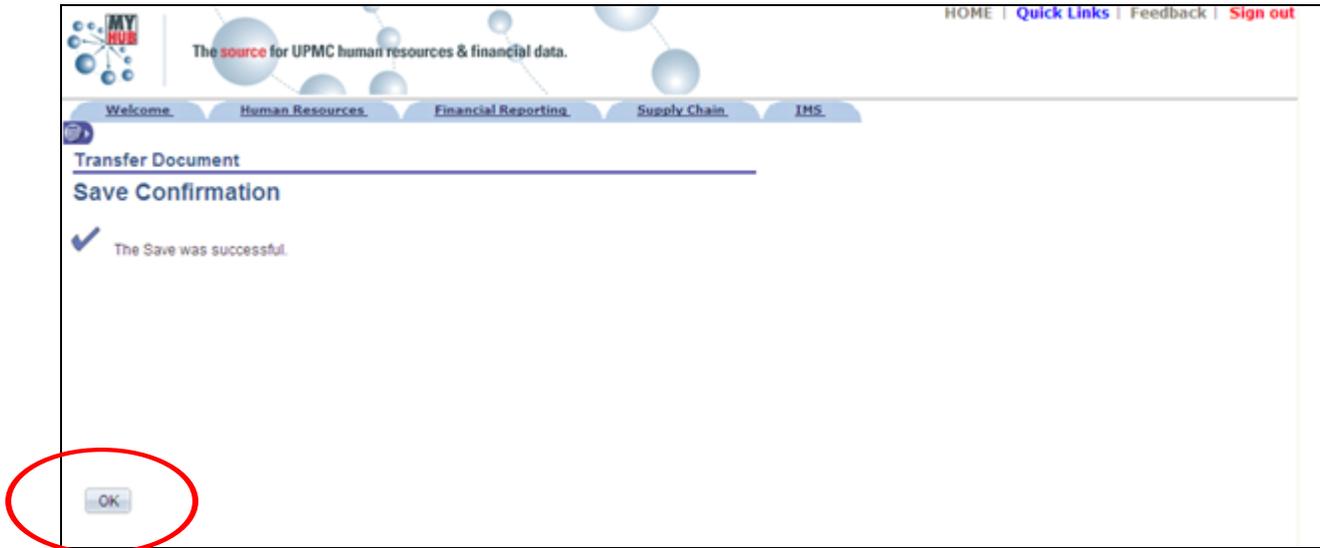
The New Owner is the name of the designee (delegate), the employee to whom the manager has transferred the review.

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).

Navigation: Performance Management Home > Complete Performance Review > View Performance Documents > View all documents of current staff.

NOTE: *If a performance evaluation has been transferred to the wrong person, or in error, contact Human Resources for options.*

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager	Rating
[REDACTED]	[REDACTED]	Annual Performance Review	10/12/2010	10/11/2011	Professional Staff Nurse	In Progress	[REDACTED]	
[REDACTED]	[REDACTED]	Six Month Performance Review	04/19/2004	10/11/2010	Professional Staff Nurse	Completed	[REDACTED]	Solid, Strong, Gc

Annual Performance Review: 10/12/2010 - 10/11/2011

Employee:	[REDACTED]	Job Title:	Professional Staff Nurse
Document Type:	Annual Performance Review	Period:	10/12/2010 - 10/11/2011
Template:	Employee Review Template	Document ID:	33644
Manager:	[REDACTED]	Status:	In Progress

Activity	Status	Due Date	Action
Establish Evaluation Criteria	✓ Completed	10/11/2011	View
Nominate Peer and Delegates	🟢 In Progress	10/11/2011	View
Track Nominations	🟢 In Progress	10/11/2011	View
View Peer/Delegate Evaluations	🟢 In Progress	10/11/2011	View
View Self Evaluation	🟡 Not Started	10/11/2011	
Review Manager Evaluation	🟡 Not Started	10/11/2011	

When an evaluation is transferred, the name of the designee (delegate) will be listed as the manager.

When an evaluation is transferred, the manager who transferred it has view-only access to the document until it is transferred back.

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.

Employee Performance Evaluations Home

Performance Evaluations	
Employee Overview	Peer Overview
Current Performance Document View status, complete self-evaluations, and verify the final review document when requested.	Peer Review Requests Accept or deny a request to complete a peer evaluation for which you have been asked to complete.
Past Performance Reviews View your past performance review documents for reviews due after June 6, 2010.	Peer Reviews to Complete Start a peer evaluation or complete a peer evaluation already in progress. You must first accept the peer review request before completing a peer evaluation.
View your Job Description	Peer Reviews you have Completed
View your Departmental Goals	

Performance Management	
Performance Management Overview This section is available for employees who have been transferred responsibility to complete a performance evaluation on the manager's behalf.	Transfer Document Transfer responsibility for a performance evaluation back to the manager for completion.
Performance Documents View a listing of performance documents that are in progress that you are responsible for completing.	

Go To [Employee Home](#)
[Personal Information Home](#)

The Performance Management section contains the resources that a designee (delegate) will need to complete a performance review

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.

Employee Performance Evaluations Home

Performance Evaluations

Employee Overview	Peer Overview
Current Performance Document View status, complete self-evaluations, and verify the final review document when requested.	Peer Review Requests Accept or deny a request to complete a peer evaluation for which you have been asked to complete.
Past Performance Reviews View your past performance review documents for reviews due after June 8, 2010.	Peer Reviews to Complete Start a peer evaluation or complete a peer evaluation already in progress. You must first accept the peer review request before completing a peer evaluation.
View your Job Description	Peer Reviews you have Completed
View your Departmental Goals	

Performance Management

Performance Management Overview This section is available for employees who have been transferred responsibility to complete a performance evaluation on the manager's behalf.	Transfer Document Transfer responsibility for a performance evaluation back to the manager for completion.
Performance Documents View a listing of performance documents that are in progress that you are responsible for completing.	

Go To [Employee Home](#)
[Personal Information Home](#)

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.

The screenshot shows the 'Transfer Document' page in a web browser. The page header includes the 'MY HUB' logo and the tagline 'The source for UPMC human resources & financial data.' The navigation bar contains links for 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', 'Home', 'Supply Chain', 'Quick Links', 'IMS', 'Feedback', and 'Sign out'. The main content area is titled 'Transfer Document' and includes a sub-header 'Select a document from the list below to transfer ownership.' A note explains that only the current supervisor can submit the review for approval. Below the note is a search form with fields for 'Employee First Name', 'Manager First Name', 'Document Type', and 'Status', along with 'Period Between' date pickers and 'Search' and 'Clear' buttons. A table titled 'Performance Documents' displays two records. The 'Continue' button at the bottom is circled in red.

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
<input type="checkbox"/>	[REDACTED]	Annual Performance Review	11/11/2010	11/10/2011	Clinician	In Progress	[REDACTED]
<input type="checkbox"/>	[REDACTED]	Annual Performance Review	07/05/2010	07/04/2011	Patient Care Technician	In Progress	[REDACTED]

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.

The screenshot shows the 'Confirm Transfer' page in the ePerformance system. The page header includes the UPMC logo and the text 'The source for UPMC human resources & financial data.' The navigation menu includes 'Welcome', 'Human Resources', 'Kronos', 'Financial Reporting', 'Supply Chain', 'Home', 'Quick Links', and 'Feedback'. The main content area is titled 'Transfer Document' and 'Confirm Transfer'. Below this is a table of 'Performance Documents' with columns for Employee ID, Employee, Document Type, Begin Date, End Date, Job Title, Status, and Manager. The table contains one row with the following data: Employee ID (redacted), Employee (redacted), Document Type: Annual Performance Review, Begin Date: 07/05/2010, End Date: 07/04/2011, Job Title: Patient Care Technician, Status: In Progress, and Manager (redacted). Below the table, there is a message: 'You have chosen to transfer the document indicated above to another manager.' A note follows: 'Note: If you are not the employee's current reports to supervisor, you can only transfer the document back to that person, who is listed below.' Below the note, it says: 'Click the save button to complete the transfer.' At the bottom, there is a 'New Owner:' field with a redacted name, a 'Save' button, and a 'Return to Previous Page' link. The 'Save' button and the 'New Owner:' field are circled in red.

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status	Manager
[REDACTED]	[REDACTED]	Annual Performance Review	07/05/2010	07/04/2011	Patient Care Technician	In Progress	[REDACTED]

You have chosen to transfer the document indicated above to another manager.

Note: If you are not the employee's current reports to supervisor, you can only transfer the document back to that person, who is listed below.

Click the save button to complete the transfer.

New Owner: [REDACTED]

[Return to Previous Page](#)

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.

