

Department	
Responsibility/Role	
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# TM-08.1 CABQ - Transferring Employee Performance Document to new Manager

Trigger:

# Concept

TM-08.1 CABQ - Transferring Employee Performance Document to new Manager

This job aid is specifically for Administrators (i.e. HR Coordinators). Managers have different capabilities and should follow the TM-06.4 CABQ Transferring an Employee Performance Document job aid.

When an employee takes a new position with another manager in your department the employee's performance document can be transferred to the new manager. The new manager will be able to update the performance document as appropriate to the new position.

<u>Navigation to transfer as an Administrator (not manager)</u>: Main Menu>Workforce Development>Performance Management>Performance Documents>Administrative Tasks>Transfer Document

Required Field(s)	Comments

Output - Result(s)	Comments

# Additional Information



#### Procedure

In this lesson we will walk through the steps for **Transferring Employee Performance Document to new Manager**.

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No Current Announcements.			View Paycheck Review current and prior paychecks.	Direct Deposit View, add, or change your direct deposit information.	W-4 Tax Information View, add, or change your W-4 information.
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Company Directory		0 • •	Forms View electronic W-2 and W-2c forms	Create a hypothetical paycheck based on your inb. earnings	Change benefit elections for Life Events such as new employee
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A problem has occurred. Please contact you system administrator.	r		Manage skills, competencies, and accomplishments in		
			your current profile.		

Step	Action
1.	Click the <b>Main Menu</b> link to begin navigation.
2.	Click the Workforce Development menu item.
3.	Click the Performance Management menu item.
4.	Click the <b>Performance Documents</b> menu item.
5.	Click the Administrative Tasks menu item.
6.	Click the Transfer Document menu item.

Main Menu*** force Development * > Performance Management * > Performance Documents * > Administrative Tasks * > Transfer Document         Home       Workist       Add to Favorites       Sig         All * Search       Advanced Search       New Window       Help       Personalize Page         nsfer Document       New Window       Help       Personalize Page         nsfer a performance document, select the checkbox for the Employee and then select the Continue push button.       Search for Documents         First Name       Last Name       Document Status       Perford Between         Bocument Type       Eff       Document Status       V	4		
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Step	Action
7.	To search for the employee's performance document enter the desired information into the <b>First Name</b> field.
	For this training enter "Albert".
8.	Enter the desired information into the Last Name field. Enter "Albuquerque".
9.	Click the Search button.
10.	To choose the employee for document transfer: Click the <b>Checkbox</b> option.
11.	Click the Continue button.



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mployee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
00031002	Albert Albuquerque	APD Annual Review	Completed	07/23/2016	06/30/2017	Human Resources Mgr	Sandy Socorro
You have cho select the rec	osen to transfer the doc ceiving manager by usin	cument indicated to another mana ig the "Select a Manager" hyperlii	ger. ik, then select the Save button to con	mplete the transfer.			
	New Manager ID:						
	<u>S</u>	elect a Manager					
Save	Return to Previous F	Page					

Step	Action
12.	To select the new manager that will be receiving the performance documents for this employee:
	Select a Manager

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RIVICEG	All V Search	>> Advanced Search	Last Search Results	
				New Window Help Personalize Page
erson Search				
earch Criteria and Results				
Instructions				
Search Criteria				
Name				
Last Name		]		
Second Last Name				
First Name				
ACName				
Search				
Return to Previous Page				

Step	Action
13.	Enter the desired information into the Name field.
	For this training enter "Andrea".
14.	Enter the desired information into the Last Name field.
	Enter " <b>Romero</b> ".
15.	Click the Search button.
16.	Click the <b>Button</b> option to the left of the correct manager's name.
17.	Click the <b>OK</b> button.



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nployee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
0031002	Albert Albuquerque	APD Annual Review	Completed	07/23/2016	06/30/2017	Human Resources Mgr	Sandy Socorro
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Save	New Manager ID: A	lect a Managed	nk, then select the Save putton	to complete the transfer			

Step	Action
18.	Click the Save button.
	Save





Step	Action
19.	Click the <b>OK</b> button.
20.	Congratulations! You have successfully completed <b>Transferring Employee</b> <b>Performance Document to new Manager</b> . <b>End of Procedure.</b>