

## QUICK REFERENCE GUIDE

<a href="#">Job Title/Description</a>	<a href="#">Add Comments</a>
<a href="#">Transfer</a>	<a href="#">Cancel</a>
<a href="#">Reopen After “Approve”</a>	<a href="#">View all Documents (for 2<sup>nd</sup> line and up)</a>
<a href="#">Accessing Completed Documents</a>	<a href="#">Delegate Performance Tasks</a>
<a href="#">Accepting Delegation and Accessing</a>	<a href="#">Revoke Delegation</a>

### ADD JOB TITLE/DESCRIPTION

- Under Section 1 – Job Description, click “Add Item”
- Add pre-defined item
- Next
- Type “the job code” or title in the title
- Search
- Check “job code – job title”
- Add
- Save

### CUSTOMIZE JOB TITLE/DESCRIPTION

- Under Section 1 – Job Description, click “Add Item”
- Add your own item
- Next
- Type/paste job title and description
- Save

### ADD COMMENTS

- Below Section 3 (Section 4 for employees) click “Add Item”
- Add a “Title” (e.g. a date or purpose of meeting such as “One-on-One”)
- Add comments in the “Description”
- Add
- Save

### TRANSFER/REOPEN/CANCEL - MANAGER PATH

- Main Menu – Manager Self Service – Performance Management – Performance Documents – Administrative Tasks - Transfer / Reopen / Cancel

### TRANSFER DOCUMENTS

- Main Menu - Manager Self Service - Performance Management - Performance Documents - Administrative Tasks - Transfer Document
- “Check” box next to employee’s name
- Continue
- Select a Manager
- Type manager name (first under Name, and last under Last Name)
- Search
- “Check” next to manager’s name
- Ok
- Save
- Ok

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## WHEN TRANSFERRING – RECOMMENDATION TO SENDING MANAGER

- Add comments in the Career Conversations form;
- Attach a document to the form; or
- Send a document to the “receiving” manager and ask to upload to the transferring employee’s form

## CANCEL

- Main Menu - Manager Self Service - Performance Management - Performance Documents - Administrative Tasks - Cancel Document
- "Check" employee’s name
- Continue
- Save
- Ok

## REOPEN AFTER APPROVE

NOTE: Only possible if no saved changes occurred after clicking “Approve”

- On the left navigator, click “Update Document”
- Click Reopen
- Towards the top right corner, click the yellow “Reopen” button
- Confirm

## VIEW DOCUMENTS OF ANYONE IN REPORT CHAIN

- Main Menu – Manager Self Service – Performance Management – Performance Documents – View Only Documents

## ACCESSING COMPLETED DOCUMENTS

- Main Menu - Manager Self Service - Performance Management - Performance Documents – Historical Documents

## DELEGATE CAREER CONVERSATIONS FORMS

- Main Menu - Self Service – Manage Delegation:
- Create Delegation Request
- Delegation Dates. You can leave it blank if you don’t have specific time frame
- Next
- Check “Update Performance Documents”
- Next
- Check employee name
- Next
- Submit
- Ok

## ACCEPT DELEGATION & ACCESS CAREER CONVERSATIONS

### Accept Delegation

- Main Menu – Self Service – Manage Delegation – Review My Delegated Authorities
- Check the box next to “Update Performance Documents” (Manager name is listed next)
- Accept
- Ok

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## ACCESS CAREER CONVERSATIONS FORMS AFTER DELEGATION

- Main Menu – Manager Self Service – Performance Management – Performance Documents – Current – Check mark next to your manager name – Continue
- Select the name of employee you want to edit  
**NOTE:** if you can't access the form: log out of ePerformance and clear the cache (Tools – Internet Options – Delete – check as many you feel possible – Delete – Apply – OK)
- Go back to PeopleSoft
- Main Menu – Manager Self Service – Performance Management – Performance Documents – Current – Check mark next to your manager name – Continue
- Select the name of employee you want to edit

## REVOKE DELEGATION (ANY TIME)

- Main Menu – Self Service – Manage Delegation – Review My Proxies
- Check the box next to “Update Performance Documents”
- Click revoke
- Yes – Continue
- OK

## QUESTIONS

If you have any Performance Review/Career Conversations Program-related questions, contact your HR Generalist.