

Canceling ePerformance Documents by HR Administrator in TeamWorks.



This job aid will demonstrate how HR administrators can cancel ePerformance documents in TeamWorks.

Note: Before a document can be deleted it must be cancelled first. "Documents should only be deleted in certain circumstances. Please be sure to consult HRA before deleting performance related documents."

- 1. Log into TeamWorks using your assigned credentials.
- Navigate to Main Menu > Workcenters > Workforce Dev WorkCenter Fluid > View Performance Management > Cancel Document link.

| | ~ workcenters | | | |
|--|---|------------|-----------------------------|----------|
| Base I | Benefits WorkCenter Flu | id Human I | Resources Wo | rkCenter |
| id Workfo | orce Dev WorkCenter Flu | iid | | |
| C S My Work Links | View Performance Documents | | | |
| Performance Management , Create Documents View Document Creation Results | Empl ID First Name Manager First Name | | Last Name Last Name | |
| View Documents Transfer Document | Document Type Period Between | ▼ | Document Status Group ID | ٩ |
| Reopen Document | Search Clear |] | | |



3. Use the Cancel Document page to search for and select performance documents to cancel.

| Cancel Document | Cancel Document | | | | | | | |
|---|-----------------|-----------------|-----------|-----|--|--|--|--|
| o cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be anceled except for already "Canceled" performance documents. | | | | | | | | |
| ▼ Search for Documents | | | | | | | | |
| Empl ID | | | | | | | | |
| First Name | | Last Name | | | | | | |
| Manager First Name | | Last Name | | | | | | |
| Document Type | ~ | Document Status | ~ | | | | | |
| Period Between | iii - | Group ID | Q Departm | ent | | | | |
| Search Clear |] | | | | | | | |

Note: The HR Admin's view contains fields to narrow the list by manager first or last name, Employee first or last name. Document Type, Status, Period Between, Group ID or Department.

It is always helpful to limit the search as much as possible.

Under most circumstances users will want to search for individual documents to cancel. To search for individual documents, use the following search criteria.

- Employee first and last name
- Employee ID
- Manager first and last name
- 4. Select the desired employee and click the **Search** button.

| Sea | arch for Doci | iments | | | | | | | | |
|---|--|---|----------------------------|---|--|---|--|--|---|--|
| | | Empl ID | | | | | | | | |
| | | First Name | DEDRE | | Last Name | BROWN | | | | |
| | м | anager First Name | | | Last Name | | | | | |
| | | Document Type | | ~ | Document Status | | ~ | | | |
| | | Period Between | | - 🗰 | Group ID | Q | Department | | | |
| | | | | | Group ID | | Department | | | |
| | | | | | | | | | | |
| | Search | Clear | | | | | | | | |
| | Search | Clear |] | | | | | | | |
| dorr | Search | Clear |] | | | | | | | |
| rforr | Search | Clear |] | | | | | | | |
| rforr 野 | Search | Clear | | | | | | | | |
| forr | Search mance Docum | Clear ments | Mid Initial | Document Type | Document Status | Period Begi | n Period End | Job Title | Manager | |
| forr T | Search Mance Docur Q Employee ID | Clear Clear Name Dedre Brown | Mid Initial A | Document Type Annual Performance Review | Document Status Define Criteria | Period Begi 05/01/2023 | n Period End 04/30/2024 | Job Title HR Spec 2 | Manager Dawn Jenkins | |
| forr () | Search | Clear Name Dedre Brown Dedre Brown | Mid Initial A A | Document Type Annual Performance Review Annual Performance Review | Document Status Define Criteria Completed | Period Begi 05/01/2023 07/01/2018 | n Period End 04/30/2024 06/30/2019 | Job Title HR Spec 2 Employment Svcs Spec 2 | Manager Dawn Jenkins Elizabeth Scott | |
| rforr IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | Search | Clear | Mid Initial A A A | Document Type Annual Performance Review Annual Performance Review Annual Performance Review | Document Status Define Griteria Completed Completed | Period Begi 05/01/2023 07/01/2018 07/01/2017 | n Period End 04/30/2024 06/30/2019 06/30/2018 | Job Title HR Spec 2 Employment Svcs Spec 2 Employment Svcs Spec 2 | Manager Dawn Jenkins Elizabeth Scott Elizabeth Scott | |

Note: If there is an error in the performance documents for an entire group the user can use the Select All link.

5. Use the Confirm Cancellation page to cancel the document. Hit the Save Button to complete the process.

| Cancel Doc | cument | | | | | | | | | |
|---|---|---|------------------------------|-----------------|--------------|------------|-----------|-----------------|--|--|
| Confirm Ca | ancellation | | | | | | | | | |
| | | | | | | | | | | |
| Performance Documents | | | | | | | | | | |
| E Q | III Q | | | | | | | | | |
| Employee ID | Name | Mid Initial | Document Type | Document Status | Period Begin | Period End | Job Title | Manage | | |
| | Dedre Brown | А | Annual Performance Review | Define Criteria | 05/01/2023 | 04/30/2024 | HR Spec 2 | Dawn Jenkins | | |
| You have chose To confirm this Save | en to cancel the perform cancellation, select the s Return to Previou | ance document: Save button. us Page | s listed. | | | | | | | |

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Note: The operation "Cancels" the entire document. Both Employee Self-Evaluations and manager Evaluations can also be "cancelled" from within the document. These are separate operations and involve different steps to "cancel" and evaluation.

6. Use the Save Confirmation page to acknowledge that the changes are successfully saved. Click ok.



Note: To confirm the document has been cancelled, navigate to the View Documents page. Search for the employee using Employee Name and ensuring that the "Document Status" is changed to "Cancelled."

Navigate back to the Main Menu > WorkCenters > Workforce Dev WorkCenter fluid > Performance Documents > View Documents.

7. End of Steps