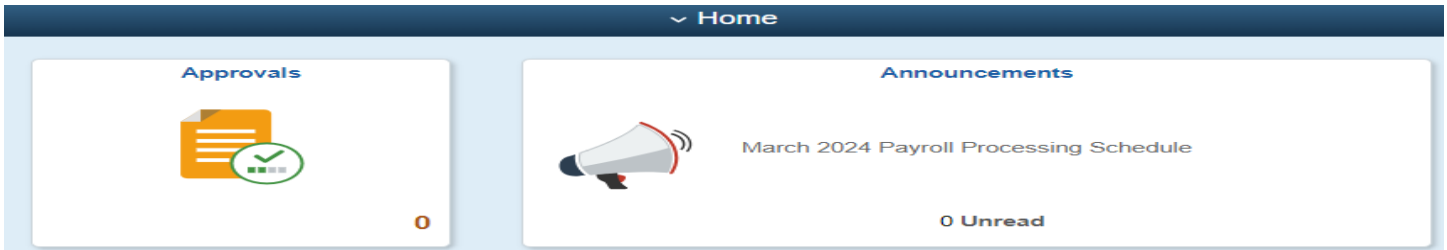


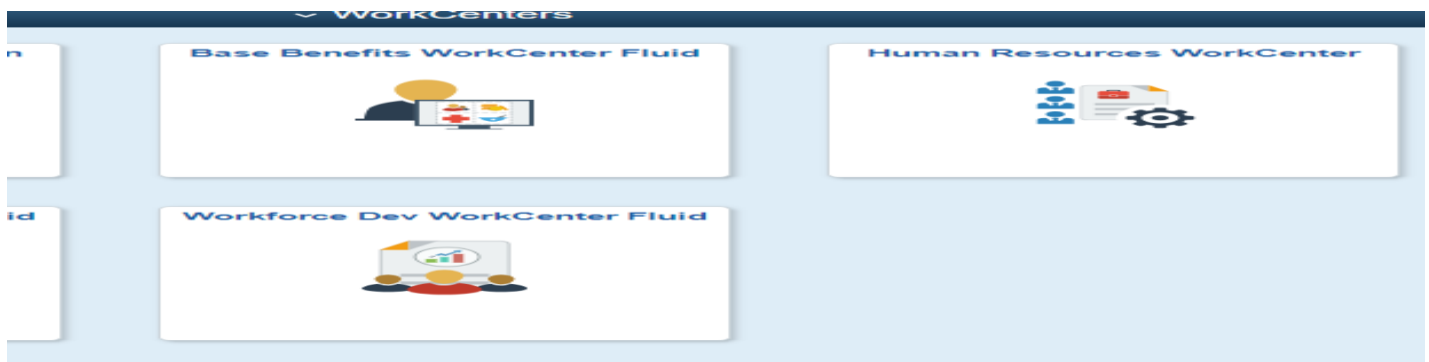
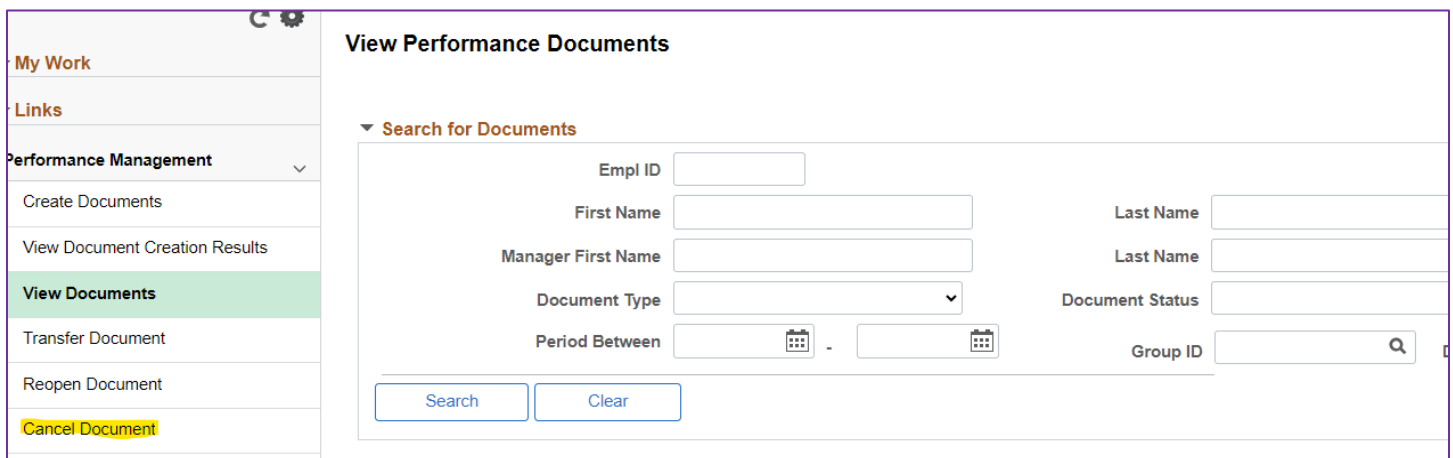
Canceling ePerformance Documents by HR Administrator in TeamWorks.



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.
2. Navigate to Main Menu > Workcenters > Workforce Dev WorkCenter Fluid > View Performance Management > Cancel Document link.

The screenshot shows the 'View Performance Documents' search interface. On the left is a navigation sidebar with 'Cancel Document' highlighted. The main area contains a search form with the following fields:

- Empl ID:
- First Name:
- Last Name:
- Manager First Name:
- Last Name:
- Document Type:
- Document Status:
- Period Between: -
- Group ID:

At the bottom of the search form are 'Search' and 'Clear' buttons.

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

Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be canceled 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 -

Group ID Department

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.

Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be canceled 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 -

Group ID Department

Performance Documents

Employee ID	Name	Mid Initial	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	
<input checked="" type="checkbox"/>	Dedre Brown	A	Annual Performance Review	Define Criteria	05/01/2023	04/30/2024	HR Spec 2	Dawn Jenkins	M
<input type="checkbox"/>	Dedre Brown	A	Annual Performance Review	Completed	07/01/2018	06/30/2019	Employment Svcs Spec 2	Elizabeth Scott	F
<input type="checkbox"/>	Dedre Brown	A	Annual Performance Review	Completed	07/01/2017	06/30/2018	Employment Svcs Spec 2	Elizabeth Scott	F
<input type="checkbox"/>	Dedre Brown	A	Annual Performance Review	Completed	07/01/2016	06/30/2017	Employment Svcs Spec 2	Elizabeth Scott	F

Select All Deselect All

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 Document

Confirm Cancellation

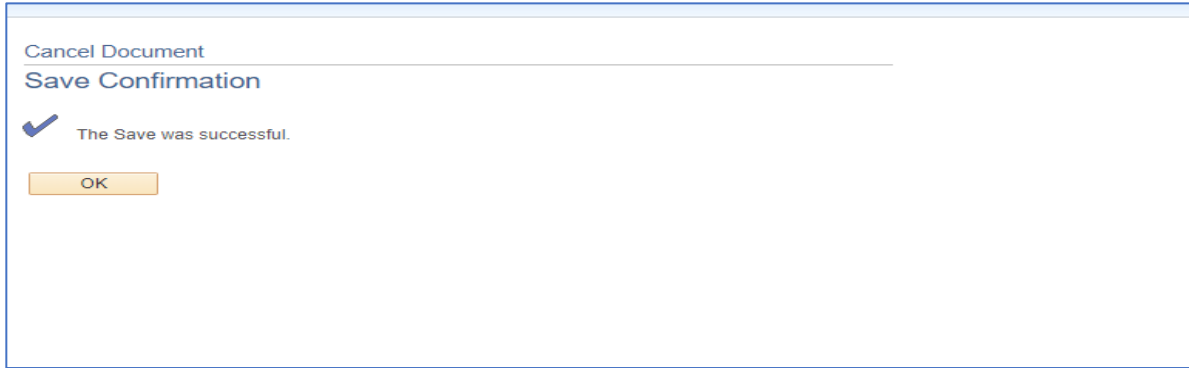
Performance Documents

Employee ID	Name	Mid Initial	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
	Dedre Brown	A	Annual Performance Review	Define Criteria	05/01/2023	04/30/2024	HR Spec 2	Dawn Jenkins

You have chosen to cancel the performance documents listed.
To confirm this cancellation, select the **Save** button.

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