



**System Process Document**  
**TM-08.1 CABQ - Transferring Employee Performance**  
**Document to new Manager**

<b>Department</b>	
<b>Responsibility/Role</b>	
<b>File Name</b>	TM-08_1 CABQ - Transferring Employee Performance Document to new Manager_SPD
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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.

**Navigation to transfer as an Administrator (not manager):**

**Main Menu>Workforce Development>Performance Management>Performance Documents>Administrative Tasks>Transfer Document**

<b>Required Field(s)</b>	<b>Comments</b>

<b>Output - Result(s)</b>	<b>Comments</b>

**Additional Information**

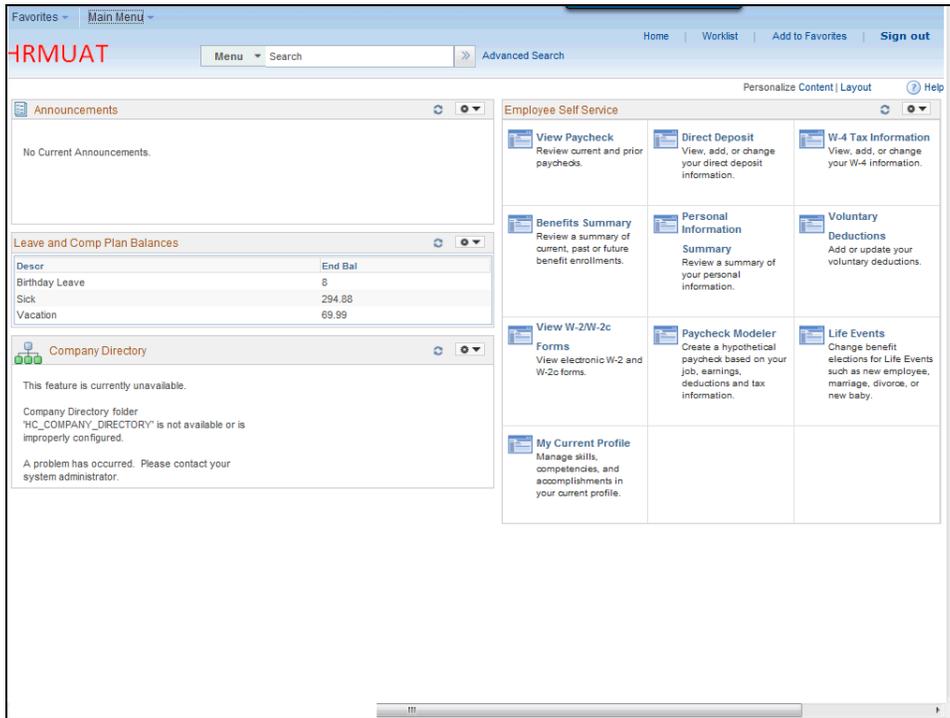
# System Process Document

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



### Procedure

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



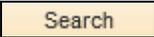
Step	Action
1.	Click the <b>Main Menu</b> link to begin navigation. 
2.	Click the <b>Workforce Development</b> menu item.
3.	Click the <b>Performance Management</b> menu item.
4.	Click the <b>Performance Documents</b> menu item.
5.	Click the <b>Administrative Tasks</b> menu item.
6.	Click the <b>Transfer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



# System Process Document

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The screenshot shows the HRMUAT web application interface. The breadcrumb trail is: force Development > Performance Management > Performance Documents > Administrative Tasks > Transfer Document. The page title is "Transfer Document". Below the title, there is a search form titled "Search for Documents". The form contains the following fields: First Name, Manager First Name, Document Type (dropdown), Period Between (date range), Last Name, and Document Status (dropdown). There are "Search" and "Clear" buttons at the bottom of the form.

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 " <b>Albert</b> ".
8.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>Albuquerque</b> ".
9.	Click the <b>Search</b> button. 
10.	To choose the employee for document transfer:  Click the <b>Checkbox</b> option. 
11.	Click the <b>Continue</b> button. 

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HRMCFG   [Advanced Search](#) [Last Search Results](#)

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Transfer Document

Confirm Transfer

Performance Documents						Personalize	Find	First	1 of 1	Last
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager			
000031002	Albert Albuquerque	APD Annual Review	Completed	07/23/2016	06/30/2017	Human Resources Mgr	Sandy Socorro			

You have chosen to transfer the document indicated to another manager.  
 Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.

New Manager ID: [Select a Manager](#)

[Return to Previous Page](#)

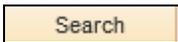
Step	Action
12.	To select the new manager that will be receiving the performance documents for this employee:  Click the <b>Select a Manager</b> link. 



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The screenshot shows the HRMCFG web application interface. At the top, there is a navigation menu with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the navigation is a search bar with 'All' and 'Search' options, and a 'Search' button. The main content area is titled 'Person Search' and contains a 'Search Criteria and Results' section. Under 'Search Criteria', there are five input fields: 'Name', 'Last Name', 'Second Last Name', 'First Name', and 'ACName'. A 'Search' button is located below these fields. A 'Return to Previous Page' link is also visible.

Step	Action
13.	Enter the desired information into the <b>Name</b> field. For this training enter " <b>Andrea</b> ".
14.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>Romero</b> ".
15.	Click the <b>Search</b> 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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Transfer Document

Confirm Transfer

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
000031002	Albert Albuquerque	APD Annual Review	Completed	07/23/2016	06/30/2017	Human Resources Mgr	Sandy Socorro

You have chosen to transfer the document indicated to another manager.  
 Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.

New Manager ID: [Andrea Romero](#)  
[Select a Manager](#)

[Return to Previous Page](#)

Step	Action
18.	Click the <b>Save</b> button. 

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Transfer Document

Save Confirmation

The Save was successful.



## System Process Document

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

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