Department	
Responsibility/Role	
File Name	**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.

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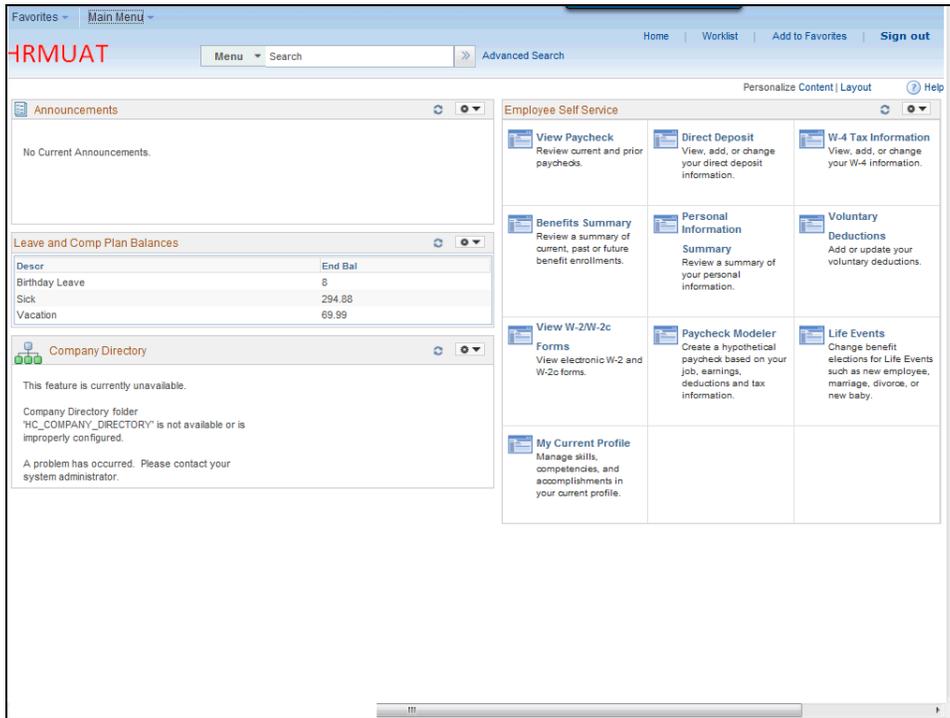
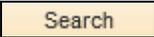| Step	Action
1.	Click the **Main Menu** link to begin navigation. Main Menu
2.	Click the **Workforce Development** menu item.
3.	Click the **Performance Management** menu item.
4.	Click the **Performance Documents** menu item.
5.	Click the **Administrative Tasks** menu item.
6.	Click the **Transfer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

Step	Action
7.	To search for the employee's performance document enter the desired information into the **First Name** field. For this training enter "**Albert**".
8.	Enter the desired information into the **Last Name** field. Enter "**Albuquerque**".
9.	Click the **Search** button. Search
10.	To choose the employee for document transfer: Click the **Checkbox** option. ▢
11.	Click the **Continue** button. Continue

System Process Document

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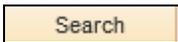

Step	Action
12.	To select the new manager that will be receiving the performance documents for this employee: Click the **Select a Manager** link. Select a Manager

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 "**Romero**".
15.	Click the **Search** button. Search
16.	Click the **Button** option to the left of the correct manager's name.
17.	Click the **OK** button. OK

Step	Action
18.	Click the **Save** button.

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