

For Rating Officials –

Retrieve or Transfer a Performance Plan/Appraisal

Retrieve a Performance Plan or Appraisal:

1. Begin at the *Performance Appraisal Application Main Page*. Note: You can only retrieve when you are not the current owner of a Performance Plan/Appraisal and the Appraisal status is not Pending PPM Approval.
2. Select the details icon in the View column next to the employee's name to view the *Details: Rating Official* page.
3. Select the **Retrieve Appraisal** button to transfer ownership to yourself and view the *Performance Appraisal Application Main Page*. Your name now appears in the Current Owner column of the retrieved Performance Plan/Appraisal.

Change the Rating Official:

Note: You will not be able to retrieve a Performance Plan or Appraisal after you have finalized a change of the Rating Official.

1. Begin at the *Performance Appraisal Application Main Page*.
2. Select the pencil icon in the Update column next to the employee's name to view the *Rating Official Review* page.
3. Select the **Change Rating Official** button to select the new rating official and view the *Change Rating Official* page.
 - Enter the last name of the new Rating Official in the **Rating Official** field.
 - Select the flashlight icon.
 - Select the quick select icon next to the name of the new Rating Official.
4. Select one of the following buttons:
 - Select the **Cancel** button to retain the existing Rating Official.
 - Select the **Save** button to continue the transfer to a different Rating Official and view the *Information* page.



- Select the **No** button to retain the existing Rating Official and return to the *Change Rating Official* page.
 - Enter your notification message and select the **Yes** button to finalize your transmission.
5. Select **Logout** at the top right side of the page to exit.

Transfer to the Employee:

1. Begin at the *Performance Appraisal Application Main Page*. Note: After completing a transfer, you will no longer be the current owner of the Performance Plan/Appraisal.
2. Select the pencil icon in the Update column next to the employee's name to view the *Rating Official Review* page.
3. Select the **Transfer to Employee** button to view the *Rating Official Notification to Employee - (Employee's Name)* page.
4. Select one of the following buttons:
 - Select the **Cancel** button to retain ownership of the performance plan and return to the *Rating Official Review* page.
 - Enter your notification message and select the **Transfer to Employee** button to finalize your transmission.
5. Select **Logout** at the top right side of the page to exit.

