

Use this task to approve an ePerformance document.

Approval levels are defined in UCPath and are based on local business practices.

Navigation: Performance Workcenter > Manager Self Service > Approve Perform/Develop Docs

Step	Action
1.	Use the Select Transactions to Approve page to search for documents that are pending your approval. In this example, search for annual performance evaluation documents.
2.	Select the appropriate Document Type . The Document Type list is restricted by Business Unit (BU) and by security roles. This list may display documents for a single BU or for several BUs, depending on your security role. Click the button to the right of the Document Type field. 

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Performance Management](#) > [Approve Documents](#)

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Select Transaction to Approve

Filter Criteria

First Name Last Name
 Manager First Name Last Name
 Document Type Document Template ID

Period Between -

- IRMED Annual Performance Docs
- IRMED Incentive Award Programs
- IRMED RN Peer/Self Review
- IRMED RN Peer/Self Review

Step	Action
3.	For this example, select the IRMED Annual Performance Docs list item. IRMED Annual Performance Docs

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Performance Management](#) > [Approve Documents](#)

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ORACLE All Search >> Advanced Search

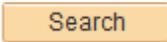
[New Window](#) | [Help](#) | [Personalize Page](#)

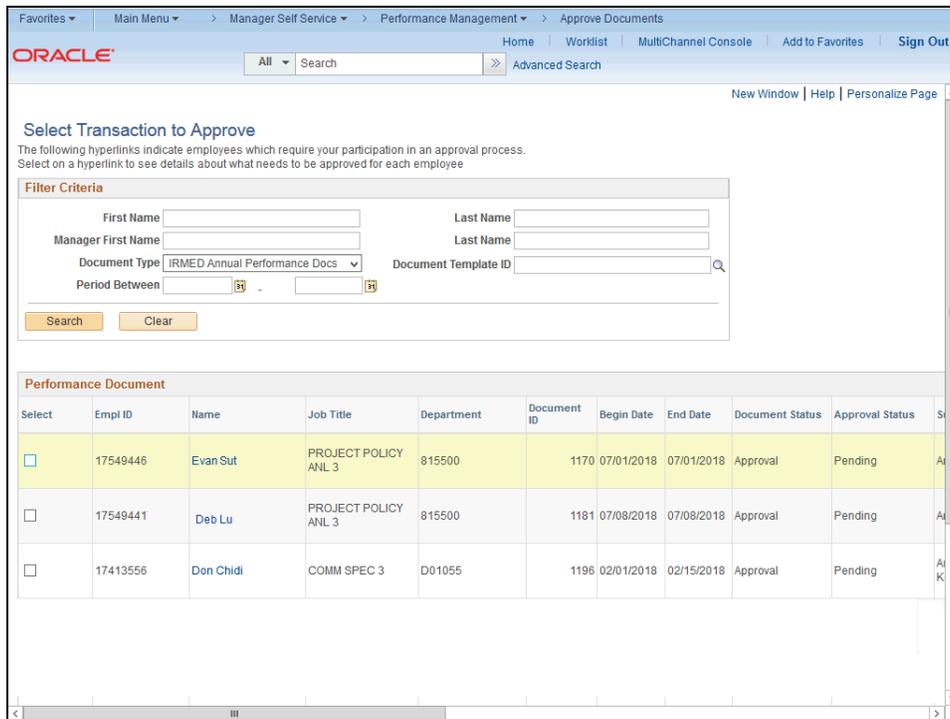
Select Transaction to Approve

Filter Criteria

First Name Last Name
 Manager First Name Last Name
 Document Type **IRMED Annual Performance Docs** Document Template ID

Period Between -

Step	Action
4.	Click the Search button. 



Select Transaction to Approve
The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

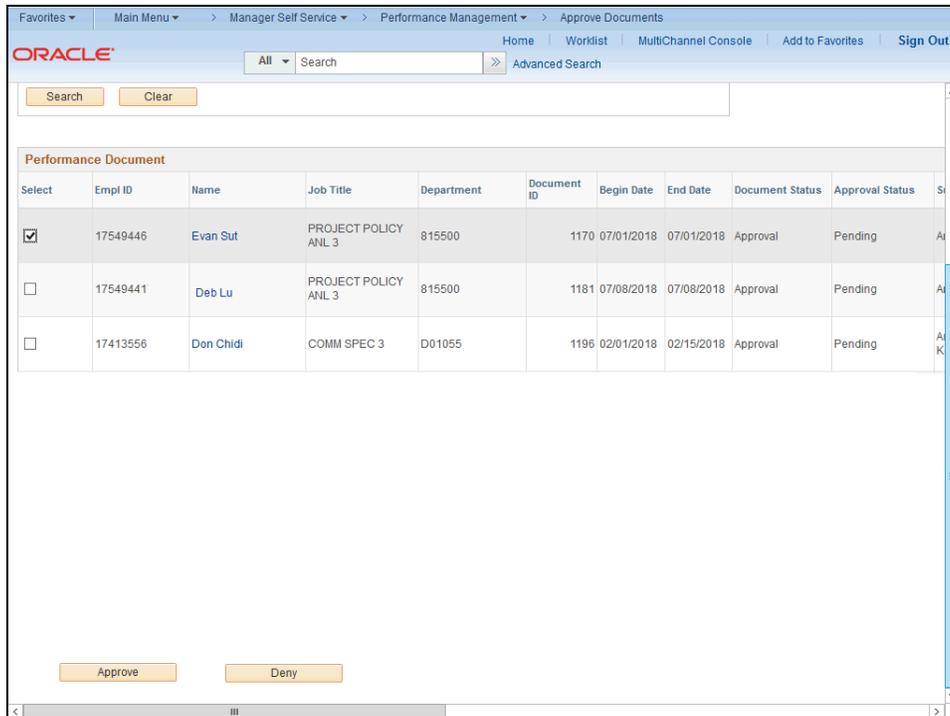
Filter Criteria

First Name: Last Name:
 Manager First Name: Last Name:
 Document Type: IRMED Annual Performance Docs Document Template ID:
 Period Between: -

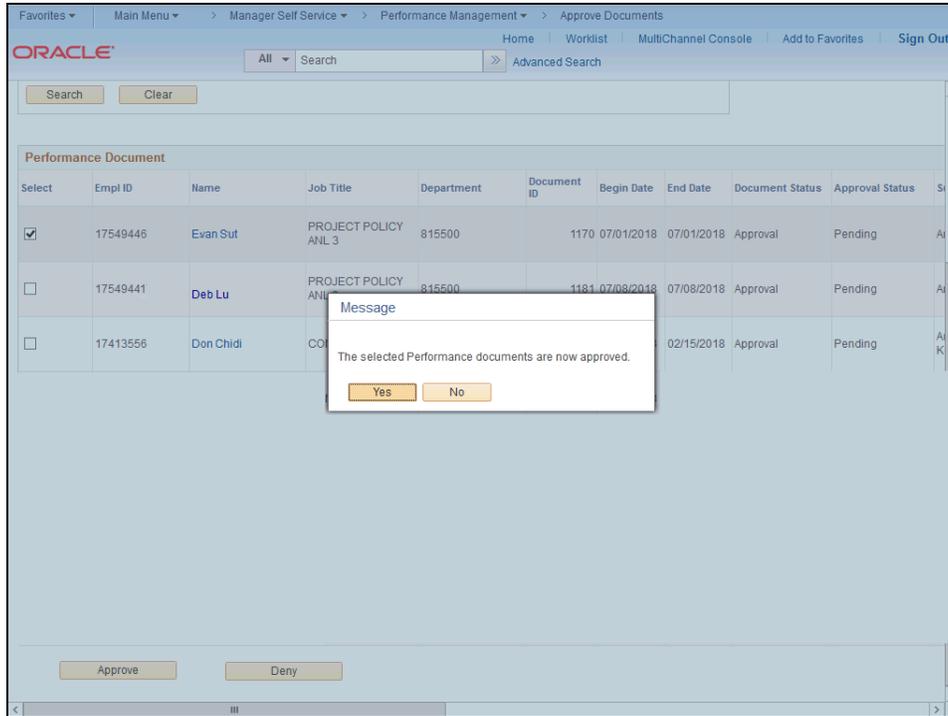
Performance Document

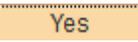
Select	Empl ID	Name	Job Title	Department	Document ID	Begin Date	End Date	Document Status	Approval Status	Si
<input type="checkbox"/>	17549446	Evan Sut	PROJECT POLICY ANL 3	815500	1170	07/01/2018	07/01/2018	Approval	Pending	At
<input type="checkbox"/>	17549441	Deb Lu	PROJECT POLICY ANL 3	815500	1181	07/08/2018	07/08/2018	Approval	Pending	At
<input type="checkbox"/>	17413556	Don Chidi	COMM SPEC 3	D01055	1196	02/01/2018	02/15/2018	Approval	Pending	At K

Step	Action
5.	UCPath displays documents pending your approval for the selected document type.
6.	Select the check box for each document you want to approve. For this example, select the check box for Evan Sut . <input type="checkbox"/>
7.	Click the scroll bar.



Step	Action
8.	<p>Approve or deny the document.</p> <p>For this example, click the Approve button.</p> <p style="text-align: center;"></p>



Step	Action
9.	<p>UCPath displays a confirmation message.</p> <p>Click the Yes button.</p> <p></p>

Select Transaction to Approve
The following hyperlinks indicate employees which require your participation in an approval process. Select on a hyperlink to see details about what needs to be approved for each employee

Filter Criteria

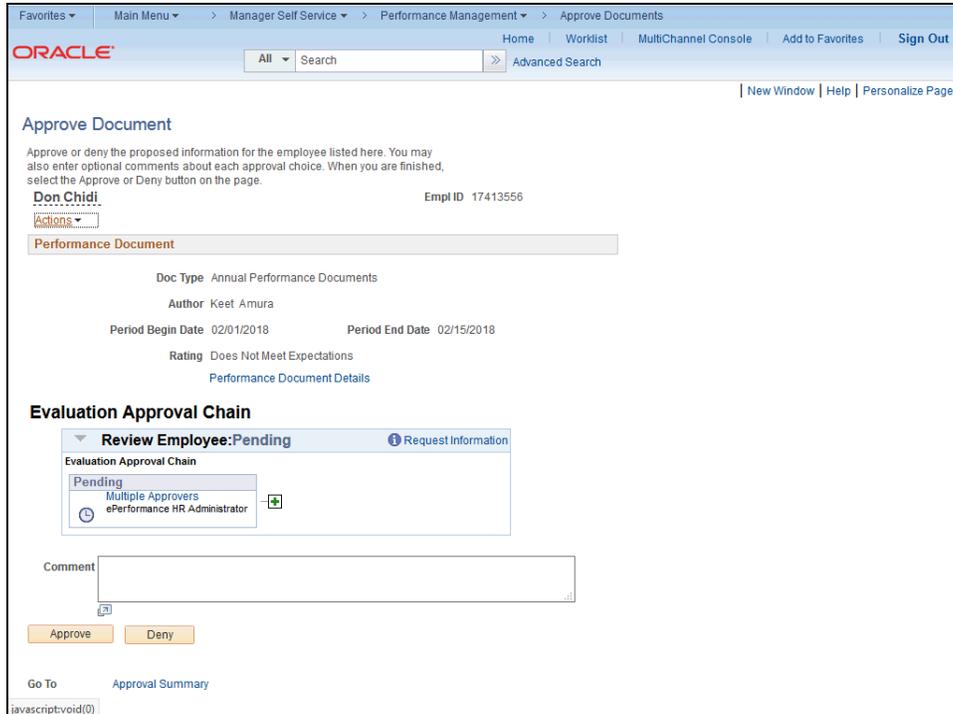
First Name: Last Name:
 Manager First Name: Manager Last Name:
 Document Type: IRMED Annual Performance Docs Document Template ID:
 Period Between: -

Performance Document

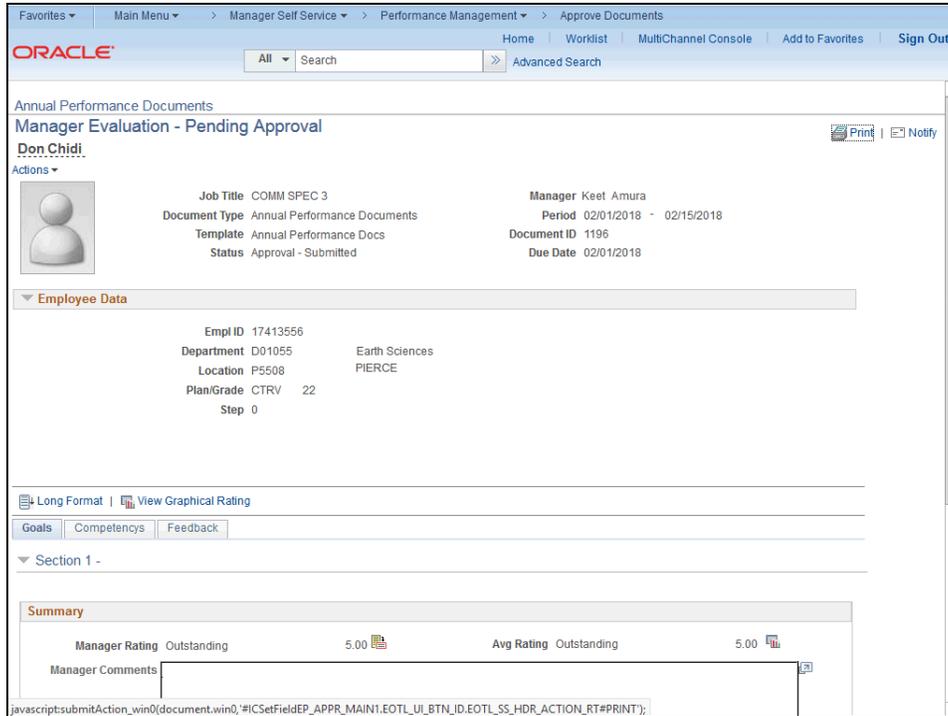
Select	Empl ID	Name	Job Title	Department	Document ID	Begin Date	End Date	Document Status	Approval Status	St
<input type="checkbox"/>	17549441	Deb Lu	PROJECT POLICY ANL 3	815500	1181	07/08/2018	07/08/2018	Approval	Pending	At
<input type="checkbox"/>	17413556	Don Chidi	COMM SPEC 3	D01055	1196	02/01/2018	02/15/2018	Approval	Pending	Al K

javascript:submitAction_win0(document.win0, SELECT_NAME251);

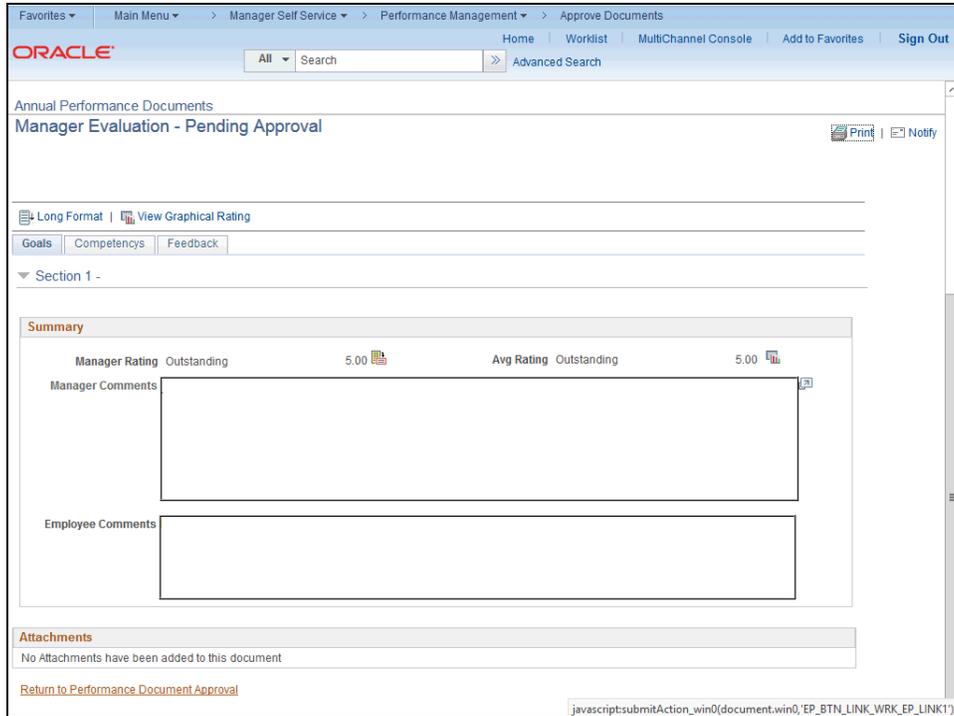
Step	Action
10.	<p>The document for Evan Sut no longer appears in the list of documents pending approval.</p> <p>Note: A manager may have both the ePerformance HR administrator role and the Manager role. If this is the case and the template for the document has the ManagerToAdmin approval definition ID attached, then the document remains in manager's approval queue waiting for the manager to perform administrator approval.</p> <p>When the manager approves the document a second time, then both approvals are processed and the document no longer appears in the manager's approval queue.</p>
11.	<p>If you have not reviewed the document yet, click the Name link to open the evaluation document before you approve it.</p> <p>For this example, review a document before you approve it.</p>
12.	<p>For this example, click the Don Chidi link.</p> <p>Don Chidi</p>



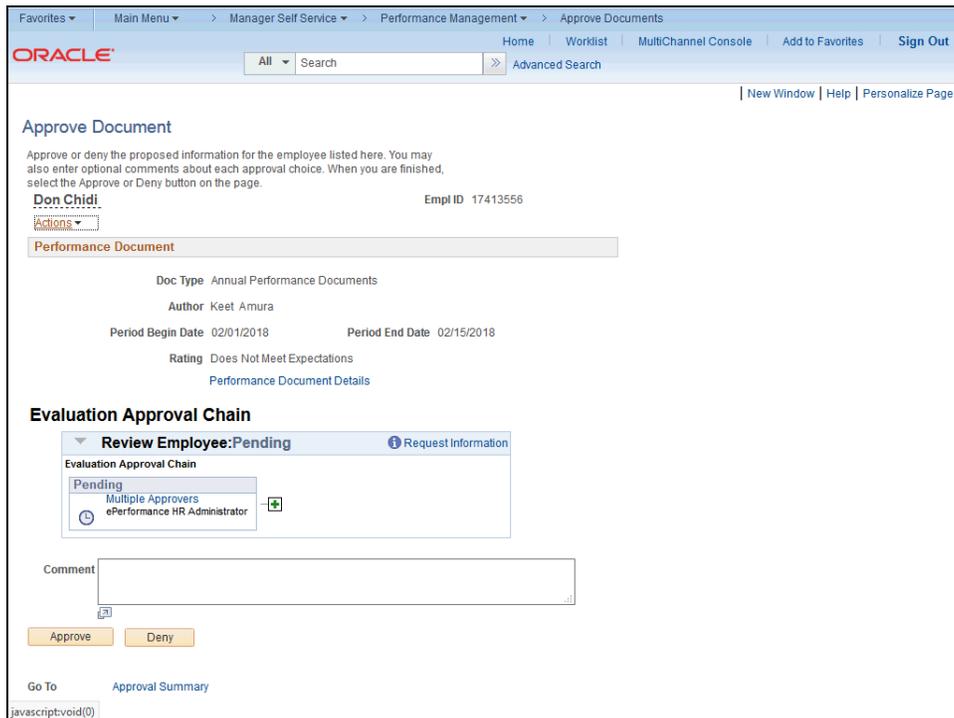
Step	Action
13.	Use the Approve Document page to approve or deny the document, provide approval comments, and view and add approvers as needed.
14.	Review high-level document details, such as the document type and rating. Use the Performance Document Details link in this section to open the document for your review.
15.	The Evaluation Approval Chain section displays the current approval status. For this example, the document is in the Pending status.
16.	The Evaluation Approval Chain section also displays the approval routing and approver names. In some cases, multiple approvers may be required. To view the names of approvers, click the Multiple Approvers link. Use the [+] button to add additional approvers, if needed.
17.	Click the Performance Document Details link to review the document. Performance Document Details



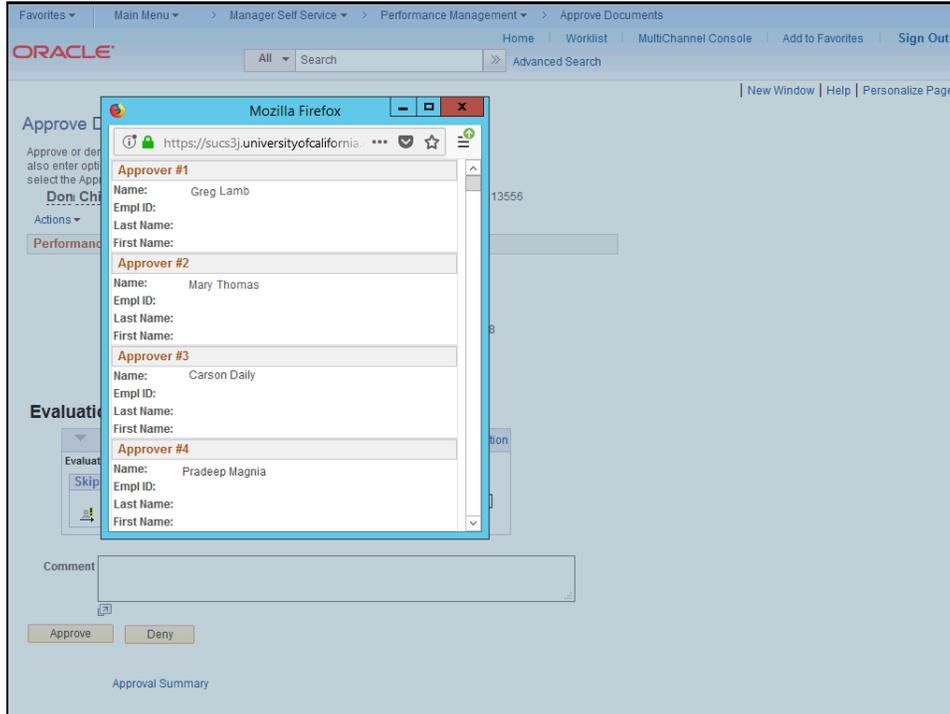
Step	Action
18.	Review the manager document, which includes inputs from the manager and the employee. When your review is complete, return to the Approve Document page.
19.	Click the scroll bar.



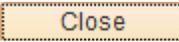
Step	Action
20.	Click the Return to Performance Document Approval link. Return to Performance Document Approval

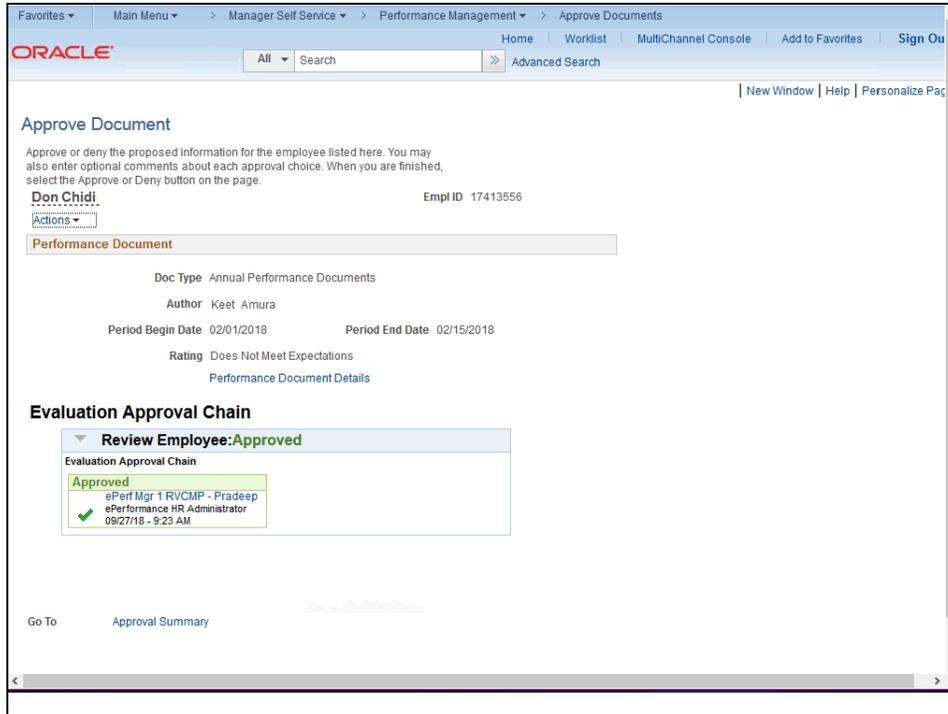


Step	Action
21.	<p>Review the multiple approvers.</p> <p>Click the Multiple Approvers link.</p> <p>Multiple Approvers</p>



Step	Action
22.	<p>Review the list of approvers.</p> <p>Click the Close button.</p> <p></p>

Step	Action
23.	Add comments about your approval or denial of the document. Click in the Comment field.
24.	Enter the desired information into the field. For this example, enter I agree with the evaluation results.
25.	Click the Approve button. 
26.	UCPath displays a confirmation message. Click the Close button. 



Step	Action
27.	The Approve Document page displays the new approval status of Approved . The document is now available for review as a historical document.
28.	You have successfully approved an ePerformance document. End of Procedure.