

The following guide provides instructions on how to rollback an e-performance document to previous stages in the process.

- 1. To update the workplan after the FRO has approved it:** The SM can start the midpoint review, then update the workplan (e.g. add an additional goal).
- 2. To make changes to the midpoint review when it has been completed:** It is not possible to update midpoint comments. The **FRO** can cancel the document so the SM may start anew.
- 3. To re-open the self evaluation:** The FRO should navigate to the 'Document Details' page, click on the 'View' link next to the 'SM Self Evaluation' step and click the Reopen button at the bottom of the page.
- 4. To re-open the FRO evaluation:** The SRO should navigate to the 'Document Details' page, click on the 'View' link next to the 'SRO Evaluation' step and click on the Return to FRO button.
- 5. To re-open the SRO evaluation:** The SRO should navigate to the 'Document Details' page, click on the 'View' link next to the 'SRO Approval' step then click the Reopen button at the bottom of the page.
- 6. Completed documents:** A document is completed (and moved to 'Historical Documents') when the SM clicks on 'Acknowledge'. Completed documents cannot be reopened. The FRO, may cancel the completed document so that the SM may create a new document for the same cycle.
- 7. To cancel a document:** The **FRO** should do the following: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Administrative Tasks > Cancel**
- 8. Additional Supervisors:** Additional supervisors must provide comments on the SM's performance prior to the FRO completing the evaluation. If the FRO has completed the evaluation, and the AS has not commented, follow the instructions on #4 to reopen the FRO evaluation step.

Use the Table Below to Find the Rollback Solution Based on Your Current Step

Current Step <i>Where I am now</i>	Step Requiring Edits <i>What I want to change</i>	Possible <i>Can I do it?</i>	Solution <i>How do I do it?</i>
Workplan (completed)	Workplan	No	Start the midpoint review and the workplan can be edited
Midpoint Review (not started or in progress)	Workplan	Yes	The workplan is modifiable at the midpoint review stage
SM Self Evaluation (not started or in progress)	Workplan	No	Cancel the document & redo
	Midpoint Review	No	Cancel the document & redo
FRO Evaluation (not started or in progress)	Workplan	No	Cancel the document & redo
	Midpoint Review	No	Cancel the document & redo
	Self Evaluation	Yes	# 3
SRO Approval (not started or in progress)	Workplan	No	Cancel the document & redo
	Midpoint Review	No	Cancel the document & redo
	Self Evaluation	Yes	# 4, followed by # 3
	FRO Evaluation	Yes	# 4
SM Acknowledgment (not started or in progress)	Workplan	No	Cancel the document & redo
	Midpoint Review	No	Cancel the document & redo
	Self Evaluation	Yes	# 5 then # 4, followed by # 3
	FRO Evaluation	Yes	# 5 then # 4
	SRO Comments/Approval	Yes	# 5