

Transfers and Performance Ratings

When an agency identifies a performance rating of record of performance rating plan that fall within the retention range in the iAPF, it has the option to reindex the source document or to one of the specified generic forms or utilize the SES Performance Appraisal. This process ensures that the document is placed in the performance folder, granting the employee immediate access to it.

Steps for Managing Performance Ratings

Identify Performance Ratings Within Retention Range

Locate performance ratings of record/performance rating plans within the specified retention range in the iAPF.

Reindex Source Document

Reindex the identified source document to one of the following generic forms:

- NON SES PERF,
- SES PREF,
- NON SES PERFORMANCE APPRAISAL,
- or SES PERFORMANCE APPRAISAL, as applicable

Place Document in Performance Folder

Ensure the reindexed document is placed in the performance folder for immediate access by the employee.

Remove/Delete Outdated Performance Ratings

Agencies should remove or delete performance ratings of records/performance ratings that are outside of the retention range from the HR System.

Perform this action as outdated ratings are discovered during routine operations or when transferring to the requesting agency.