How Do I Add a Co-Planner to a Performance Review

Managers have the ability to add co-planners for a performance review.

The Add Co-Planner option is available from the Options drop-down within the performance review.

Co-planners can perform reviews as though they were the manager who was assigned the review task.

This can be useful for managers to obtain reviews for employees who have transferred from another job or department.

To add a co-planner, click the Add Co-Planner option from the Options drop-down.

This opens the Add Co-Planner pop-up. Click the Select User button to search for and select co-planners.
Enter the name of the supervisor(s) to search for and select Co-Planners

Predictive search is used to display users who match the entered text as it is entered.

The selected co-planners then appear in the field. There is no limit to the number of co-planners that can be added.

To remove a selected co-planner, click the Remove icon to the right of the co-planner's name.

**Using the Co-Planner Feature**

With the Co-Planner feature, once the Co-Planner is added, the review workflow runs in parallel, and whichever Co-Planner gets there first technically takes over the review.

*If the current Immediate Supervisor wants to provide comments and perform the discussion:*
When the employee completes Step 1, and the review moves to Step 2, the current supervisor should add the previous supervisor as the Co-Planner, and communicate with the previous supervisor to complete only Step 2, but not submit the review to Step 3 (Save & Exit only). If the previous supervisor submits at Step 2, the review moves to Step 3. If the current supervisor wants to add input at Step 2, HRIS would need to reopen the review to Step 2.

When the previous supervisor has completed input at Step 2, the current supervisor can complete his portion of Step 2, then submit. At Step 3, the current supervisor would have the discussion with the employee, then sign off.

**If the current Immediate Supervisor wants the previous Supervisor to complete the review:**

When the employee completes Step 1, and the review moves to Step 2, the current supervisor should add the previous supervisor as the Co-Planner, and communicate with the previous supervisor to complete Steps 2 & 3., When the previous supervisor submits at Step 2, the review moves to Step 3, and the previous supervisor can continue when the Center Head is in agreement with the Center’s scoring.

To proxy as another employee, from the menu path Admin > Users, on the Users search page, input the last name of the individual and select Search.