

What Happens When the Employee's Immediate Supervisor Changes during the Performance Review Period?

If an employee changes Immediate Supervisors in the middle of the Performance Review, the most important information to capture within the Performance Review at this point is the prior Immediate Supervisor's feedback on that employee's performance.

The current Immediate Supervisor may have little or no insight on what that employee did over the last 12 months.

It's important to utilize Co-Planners to allow the prior Immediate Supervisor to Rate and Comment on the employee's performance.

The current Immediate Supervisor or the HR Center Contact can add the prior Immediate Supervisor as the Co-Planner within the review step. HRIS can also help add a Co-Planner if necessary.

Scenario 1: Step 1-Self Evaluation is Complete, Step 2-Immediate Supervisor Review is incomplete, but the Immediate Supervisor added/saved comments and ratings.

The Immediate Supervisor should select the SAVE AND EXIT or SAVE AND CONTINUE button when they have updated the Ratings/Comments, so they can come back to it later to edit or complete the Ratings/Comments.

- Save and Exit: Ratings and Comments will stay in Edit Format - they will not permanently submit.
- Save and Continue: Ratings and Comments will stay in Edit Format - they will not permanently submit. If fields are not completed within the Step, a Required Field Error message will display.
- Submit: The Immediate Supervisor can submit the review.

When The Employee Moves to a New Immediate Supervisor:

- The Employee will not be impacted from a Review Perspective;
- The prior Immediate Supervisor will not see the review in their My Tasks Queue;
- The new Immediate Supervisor will automatically be designated as a Co-Planner for that Employee;
- The New Immediate Supervisor will be assigned the review;
- The New Immediate Supervisor will see all of the prior Immediate Supervisor's Comments and Ratings;
- The prior Immediate Supervisor's ratings are pre-populated in current Immediate Supervisor's Rating Drop Down;

- The current Immediate Supervisor will be able to edit the ratings (pre-populated from prior Immediate Supervisor's Ratings), and the Comments Box is empty for current Immediate Supervisor to provide own comments;

If the prior Immediate Supervisor needs to complete their comments/ratings:

- The New Immediate Supervisor should select the Add Co-Planner link and search the prior Immediate Supervisor's name, then select Save and Exit, or the HR Center Contact or HRIS can also assist where necessary to add the Co-Planner;
- The prior Immediate Supervisor will be re-assigned the review Step 2 as a Co-Planner.
- The review will re-appear in the prior Immediate Supervisor's Task Queue.
- All of the prior Immediate Supervisor's comments/ratings provided prior to the supervisor change will display in an edited format. The prior Immediate Supervisor can make edits to previous comments/ratings.
- The current Immediate Supervisor will still have the review available in their queue.

When the prior Immediate Supervisor edits the comments/ratings and selects **Save and Exit**:

- The current Immediate Supervisor will see all of prior Immediate Supervisor's changes

*If the prior Immediate Supervisor completes the review and selects **Save and Submit**:*

- *The review will no longer be in the prior Immediate Supervisor's My Tasks queue after submission.*
- *The review will move to the next Step. The current Immediate Supervisor has no obligation to that particular review step after assigning the prior Immediate Supervisor as the Co-Planner.*

If the current Immediate Supervisor selects Submit at any time:

- The review will move to the next Step.

Scenario 2: Step 1-Self Evaluation is Complete. Step 2-Immediate Supervisor Review is incomplete: the Immediate Supervisor never added Comments or a Rating.

The Employee Moves to a New Immediate Supervisor

- The Employee will not be impacted from a review perspective;

- The prior Immediate Supervisor will not see the review in their My Tasks queue;
- The current Immediate Supervisor will be assigned the review;
- The current Immediate Supervisor will be able to input their own comments/ratings;

If the prior Immediate Supervisor did not add any comments/ratings, there is no indication within the review that the prior Immediate Supervisor provided any rating.

- The prior Immediate Supervisor will need to provide their comments/ratings;
- The current Immediate Supervisor will need to select the Add Co-Planner link and search the prior Immediate Supervisor's Name, then select Save and Exit.
- The prior Immediate Supervisor will be assigned the review Step 2 as a Co-Planner.
- The review will re-appear in the prior Immediate Supervisor's My Tasks queue.
- The current Immediate Supervisor will still have the review available in their queue.
- The prior Immediate Supervisor edits the comments/ratings and selects **Save and Exit**.
- The current Immediate Supervisor will see all of prior Immediate Supervisor's changes

If the prior Immediate Supervisor Completes and Submits the review

- *The review will no longer be in the prior Immediate Supervisor's My Tasks queue after submission.*
- *The review will move to the next step. The current Immediate Supervisor has no obligation to that review step after assigning the prior Immediate Supervisor as the Co-Planner.*

If the current Immediate Supervisor selects Submit at anytime

- The review will move to the next Step.