

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

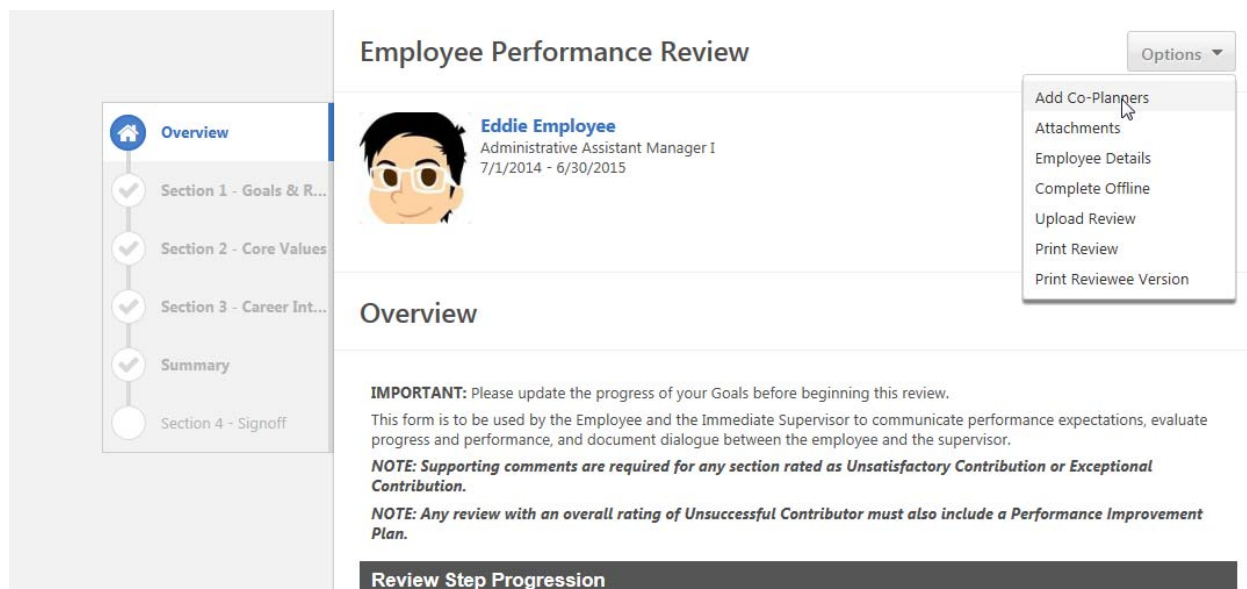
Managers have the ability to add co-planners for a performance review.

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.

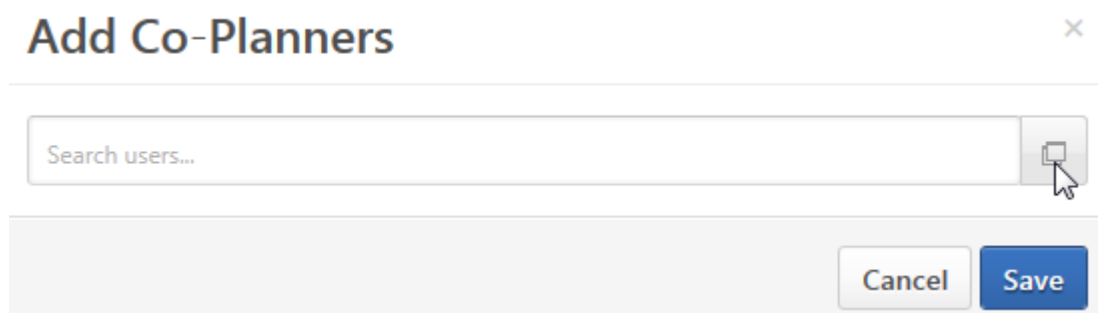
This can be useful for managers to obtain reviews for employees who have transferred from another job or department.

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



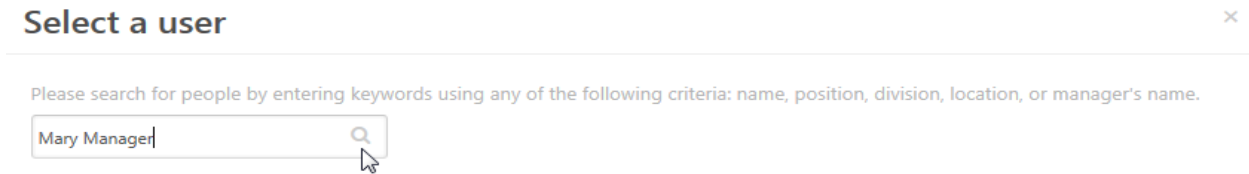
The screenshot shows the 'Employee Performance Review' interface. On the left is a navigation sidebar with 'Overview' selected. The main content area shows the employee's name 'Eddie Employee', title 'Administrative Assistant Manager I', and dates '7/1/2014 - 6/30/2015'. An 'Options' dropdown menu is open, listing 'Add Co-Planners', 'Attachments', 'Employee Details', 'Complete Offline', 'Upload Review', 'Print Review', and 'Print Reviewee Version'. Below the menu, there is an 'Overview' section with important instructions and a 'Review Step Progression' bar.

This opens the Add Co-Planner pop-up. Click the **Select User** button  to search for and select co-planners.

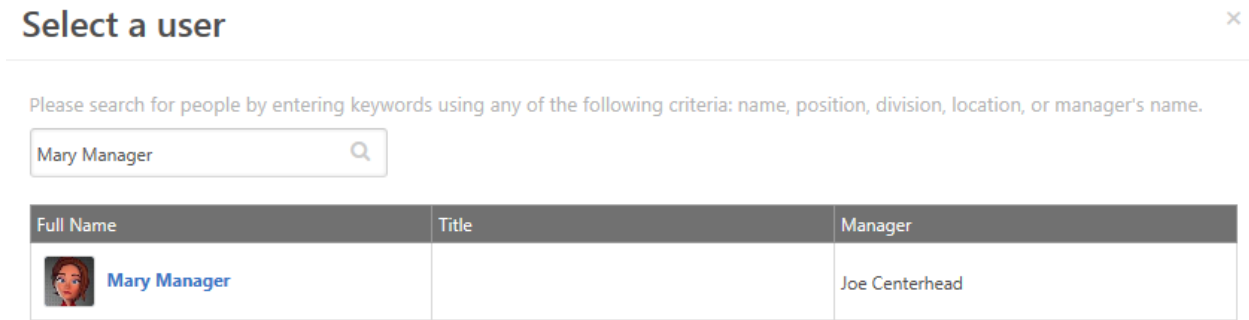


The 'Add Co-Planners' pop-up window features a search bar with the placeholder text 'Search users...' and a 'Select User' button icon. At the bottom, there are 'Cancel' and 'Save' buttons.


Enter the name of the supervisor(s) to search for and select Co-Planners

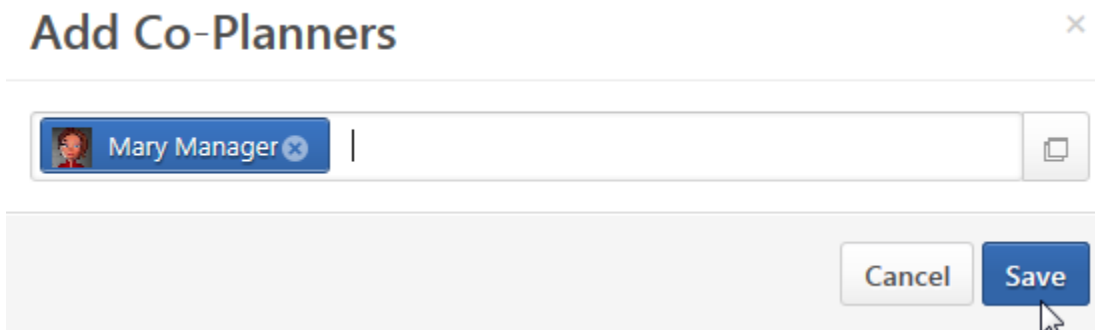


Predictive search is used to display users who match the entered text as it is entered.



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 Step1, 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 Step1, 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