

The purpose of this job aid is to provide a manager with instructions on how to add and remove a Co-Planner to an in-progress Performance Review. **Co-Planners can only be added during the manager step of the performance review, by the manager responsible for the review.**

The Co-Planner function should be used when an employee has had a recent change in assignment and the previous manager has most of the employee's performance information from the previous year. It is also useful when another manager or supervisor involved in the employee's performance would like to add comments to a specific section. The Co-Planner function is not meant to be a peer review tool.

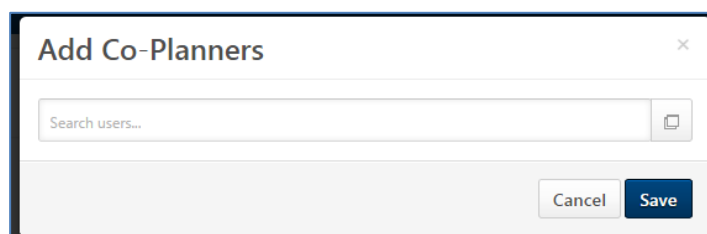
Adding a Co-Planner

1. Under your **Performance Tasks**, click the employee's performance review. The employee's performance review will open.
2. In the top-right corner of the review find the **Options** drop down. Click on the arrow next to **Options** and select **Add Co-Planners**.



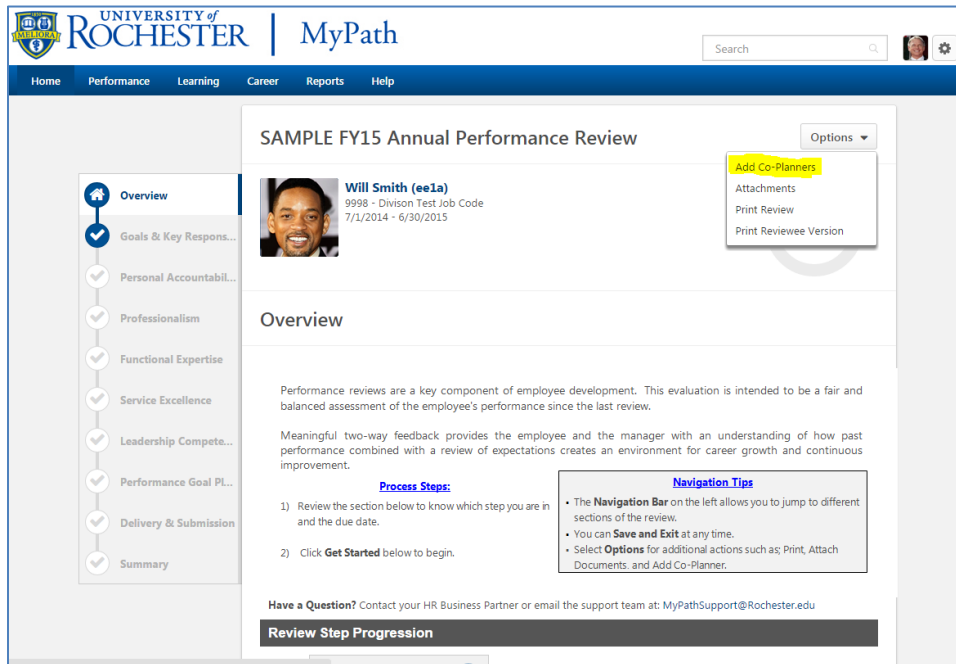
Co-Planners can only be added by the manager responsible for the review, during the manager review step.


3. The **Add Co-Planners** box appears. Begin typing the name of the employee who should be added as a Co-Planner; a list of employees will appear. Select the employee who should be the Co-Planner. **Save**.



Removing a Co-Planner

1. Open the employee's performance review.
2. In the top-right corner of the review find the **Options** drop down. Click on the arrow next to **Options** and select **Add Co-Planner**.



3. The **Add Co-Planners** box appears with the name of the Co-Planner. Select the remove icon  next to the Co-Planner's name to remove the employee as a Co-Planner. **Save**.

