



Supervisor & Reviewer: How to Add or Remove a Co-Planner

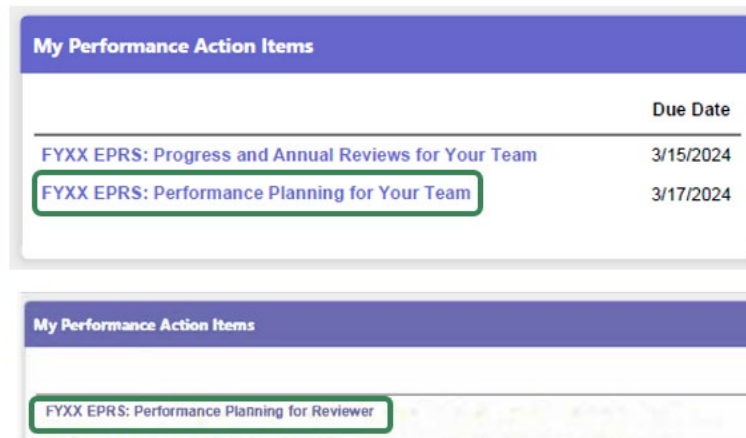
The following steps guide a *supervisor* or *reviewer* through adding or removing a co-planner to an employee's EPRS. If there are multiple employees, these steps will need to be repeated for each individual. Please note, you can only add or remove a co-planner for the current review period and only if the EPRS has not been completed in its entirety (i.e. the employee has not submitted their final action item for Stage C).

Option 1: Add a Co-Planner While in an Active Task

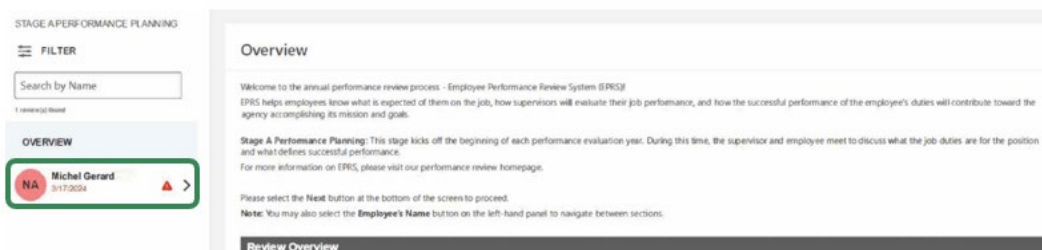
This information applies to supervisors or reviewers who have an active EPRS action item, who have not submitted and have not exited out of their performance review. If you have submitted and exited out, please refer to option 2 below.

STEP 1. Sign in to your **MyPath** account at **mass.csod.com** (Login is your employee ID).

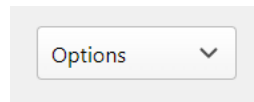
STEP 2. On the homepage, locate the **My Performance Action Items** box on the right side of the screen and click the **FYXX EPRS: Performance Planning for Your Team** link if you are a supervisor or the **FYXX EPRS: Performance Planning for Reviewer** link if you are a reviewer.



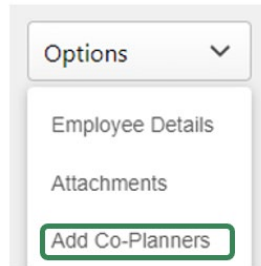
STEP 3. You'll be brought to the **Overview** page. Please select the **Employee's Name** button on the left-hand panel to navigate to the desired employee's performance review.



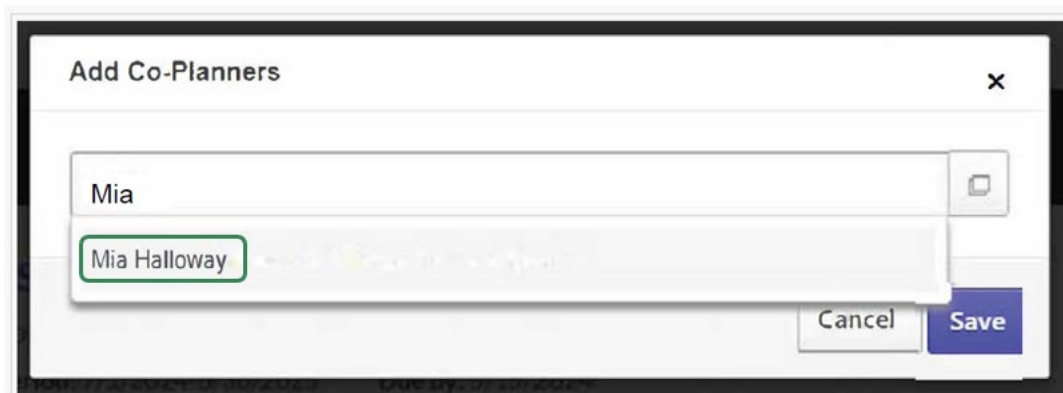
STEP 4. While in the task, click the **Options** button in the top right corner of the screen.



STEP 5. Select the **Add Co-Planner** button. A pop-up box will appear.

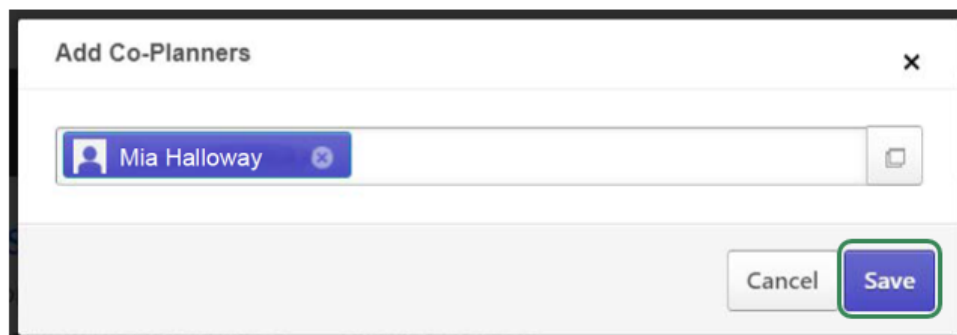


STEP 6. In the pop-up window, start typing the desired co-planner's name in the **Text Box** field. Click on the name of the co-planner to have them added.



Note: If necessary, more than one co-planner can be added at a time.

STEP 7. Then, click the **Save** button to have them added to the performance review.

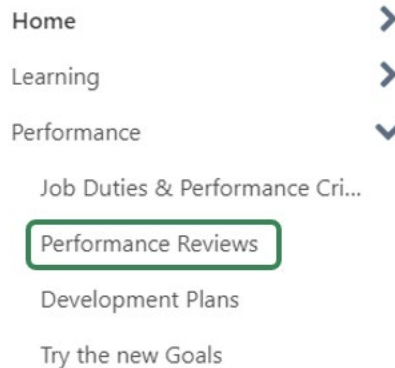


Option 2: Add a Co-Planner While outside of the Task

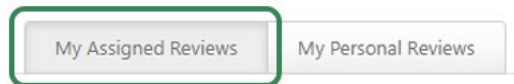
This information applies to supervisors or reviewers who have already completed their Stage B EPRS action item.

STEP 1. Sign in to your **MyPath** account at **mass.csod.com** (Login is your employee ID).

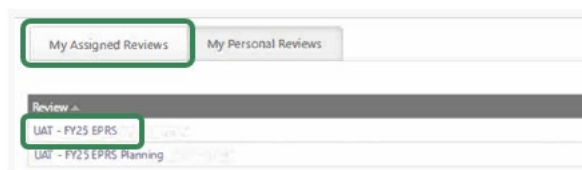
STEP 2. From the homepage, click the navigation menu in the top right corner of the screen. Click **Performance** dropdown menu and then select **Performance Reviews**.



STEP 3. To access a performance review from the current review period, select the **My Assigned Reviews** tab.



STEP 4. Select the review you are looking for from the list that appears below.

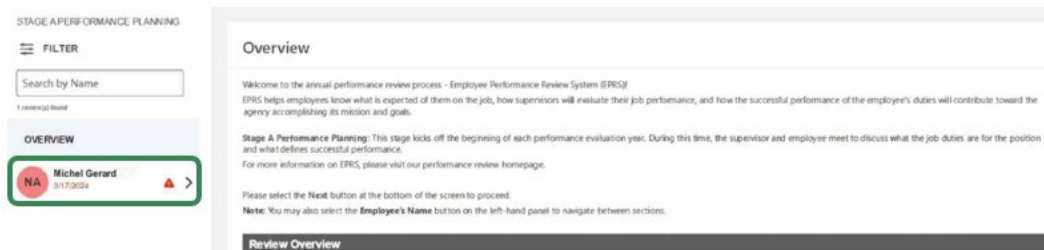


Note: If you are not seeing the performance review you are seeking, try filtering the results by title and/or status.

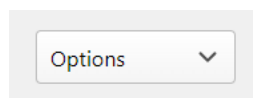
Title:

Status: ☐ Not Started ☐ In Progress ☐ Completed ☐ Incomplete ☐ Expired

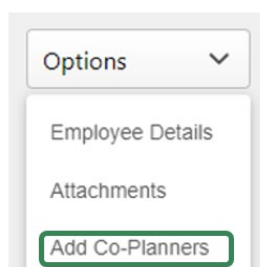
STEP 5. You'll be brought to the **Overview** page. Please select the **Employee's Name** button on the left-hand panel to navigate to the desired employee's performance review.



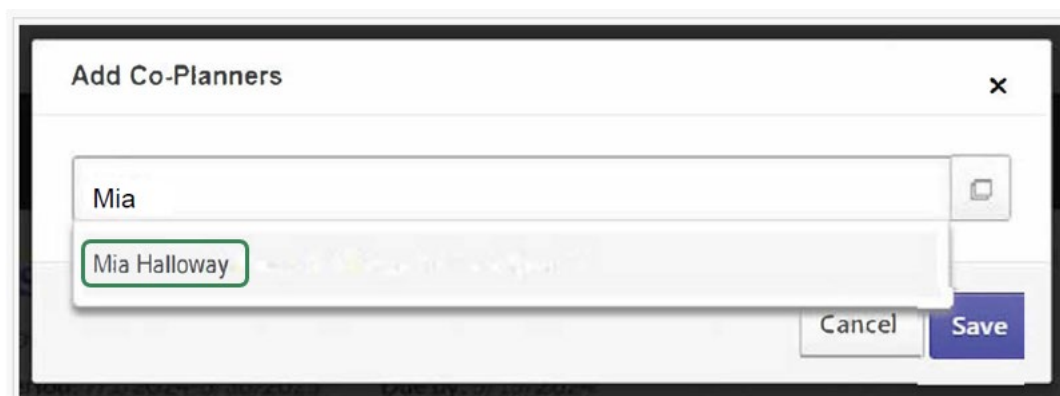
STEP 6. While in the task, click the **Options** button in the top right corner of the screen.



STEP 7. Select the **Add Co-Planner** button. A pop-up box will appear.

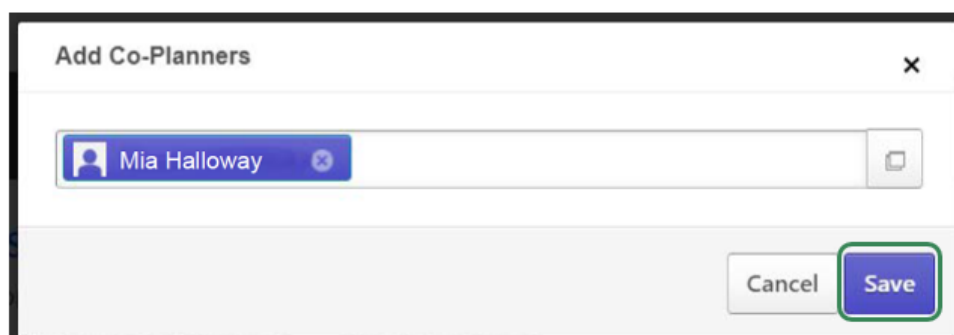


STEP 8. In the pop-up window, start typing the desired co-planner's name in the **Text Box** field. Click on the name of the co-planner to have them added.



Note: If necessary, more than one co-planner can be added at a time.

STEP 9. Then, click the **Save** button to have them added to the performance review.



How to Remove a Co-Planner

To remove a co-planner, please follow the applicable steps above in either Option 1 or Option 2 to navigate to the performance review. Reminder: Option 1 is applicable for when the supervisor or reviewer is within their assigned active task; while Option 2 is applicable when the supervisor or reviewer has already completed their Stage B task and the form is currently with another EPRS participant.

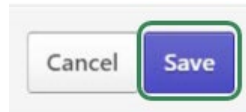
Option 1 Steps-

STEP 1. Follow steps 1 – 5.

STEP 2. Then, click the **X** button to the right of the co-planner's name.



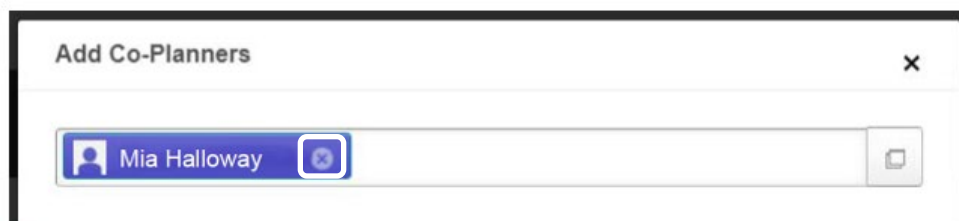
STEP 3. Then, click the **Save** button to have them removed from the performance review.



Option 2 Steps-

STEP 1. Follow steps 1 – 7.

STEP 2. Then, click the **X** button to the right of the co-planner's name.



STEP 3. Then, click the **Save** button to have them removed from the performance review.

