



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.

	Due Date
YXX EPRS: Progress and Annual Reviews for Your Team	3/15/2024
YXX EPRS: Performance Planning for Your Team	3/17/2024
y Performance Action Items	
Performance Action Items	

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.

STAGE APERFORMANCE PLANNING	
	Overview
Search by Name	Welcome to the annual performance review process - Employee Performance Review System (EPRS)
1 intensity floated	FIPS helps employees know what is expected of them on the job, how supervision will evaluate their job performance, and how the successful performance of the employee's duties will contribute toward the agency accomplishing its mission and goals.
OVERVIEW	Stage A Performance Planning: This stage kicls off the beginning of each performance evaluation year. During this time, the supervisor and employee meet to discuss what the job duties are for the position and what befores successful performance.
Michel Gerard	For more information on EPRS, please visit our performance review homepage.
NA 3/17/2024 A >	Please used: the Next button at the bottom of the scneen to proceed.
	Note: You may also select the Employee's Name batton on the left-hand panel to navigate between sections.
	Review Overview

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.

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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**.

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Le	earning	>
Pe	erformance	~
	Job Duties & Performance Cri	
	Performance Reviews	
	Development Plans	
	Try the new Goals	

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

My Assigned Reviews	My Personal Reviews
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STEP 4. Select the review you are looking for from the list that appears below.

My Assigned Reviews	My Personal Reviews	
My Assigned Reviews	My Personal Reviews	
Review +		

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

Title:	
	Q Search
Status:	
🗌 Not Started 🗌 In Progress 🗌 Comp	leted 🗌 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.

STAGE APERFORMANCE PLANNING	
	Overview
Search by Name	Welcome to the annual performance review process - Employee Performance Review System GPRSI/
1 renewig third	EPIIS before mployees know what is expected of them on the job, how supervisors will evaluate their job performance, and how the successful performance of the employee's duties will contribute toward the agreey accomplishing its mission and goals.
OVERVIEW	Stage A Performance Planning: This stage licks off the beginning of such performance evaluation year. During this time, the supervisor and employee meet to discuss what the job duties are for the position and what delines successful performance.
Michel Gerard	For more information on TPRS, please visit our performance review homepage.
3117/2694 4 7	Please arried the Next button at the bottom of the screen to proceed.
	Note: You may also select the Employee's Name button on the left-hand panel to navigate between sections.
	Review Overview

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

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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.

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	Cancel Save

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.

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	Cancel Save

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- Within an Active Task

STEP 1. Follow steps 1 – 5.

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

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

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Cancel	Save

Option 2 Steps- Outside the Task

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.

