



Manager: Add or Remove a Co-Planner

Add a Co-Planner

The following steps guide you through the process of adding or removing a co-planner to an employee's Kickoff or Wrap Up tasks. Managers who anticipate being unable to complete their steps of an employee's Kickoff or Wrap Up should add a co-planner to assume their responsibilities.

- 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 MassPerform [Kickoff or Wrap Up] for Your Team link.



STEP 3. You'll be brought to the **Overview** page for the **FYXX MassPerform Kickoff or Wrap Up** (depending on which task you're working on). Select the **Employee's Name** button that corresponds with the employee to whom you are assigning a co-planner. *If you are assigning a co-planner to multiple employees (i.e., you have more than one direct report), then you must do this for each employee.*

	MANAGER ASSESSMENT & RATING		Overview					
2 2	Search by Name			Welcome to the annual MassPerform Wrap Up task! The steps in this task are meant to guide a thoughtful reflection on the employee's performance and significant accomplishments from the past year. The comments entered here and discussed during the Wrap Up Check- in will help inform the manager as they assign a final rating. Please select the Next button at the bottom of the screen to proceed to expectation and goal reflection.				
	OVERVIEW		Revi	ew Overview	on on the left-hand panel to r	avigate to the next section.		
	KRISTINA JESSUP 3/10/2024	•>		Employee Reflect on Performance				
	3/10/2024	▲ >		Manager Assessment & Rating				
			-	Wrap Up Task Validation Period				
			0	Manager Signoff				
				Employee Signoff				
							Next	

STEP 4. After selecting an employee, click the **Options** drop-down menu button in the top right corner and click the **Add Co-Planners** button.

Options	
Add Co-F	Planners
Print Rev	iew
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STEP 5. The Add Co-Planners pop-up box will appear. Search for the co-planner you wish to add by starting to type their name into the text field. From your search results, confirm the correct individual to add, then select their name once it appears. Repeat for any other co-planners you wish to add for that employee, then click the Save button.

Add Co-Planners	×
Jared Garland 🛞	٥
	Cancel Save

Remember: The manager, employee, and co-planner will all receive an email confirming that a coplanner has been added. The co-planner will now see an action item for the employee being reviewed.

STEP 6. Repeat steps 3 – 5 for each employee to whom you are assigning a co-planner.

Remove a Co-Planner

- **STEP 1.** Repeat Steps 1 3 from the **Add Co-Planner** instructions above.
- STEP 2. From the search window that opens, you will see any current co-planners listed. To remove, select the "X" delete button in the co-planner's name box to the right of their name. Repeat for any other co-planners you wish to remove, then click the Save button.

Note: The manager, employee, and co-planner will **not** receive an email confirming that a co-planner has been removed; however, any outstanding steps will be removed from the co-planner's action items.

Notes on Co-Planners:

- Managers can only add or remove co-planners when they have an **open action item** to complete. To add a co-planner when there is no open action item, please contact the Employee Service Center.
- Co-planners can **only** complete Kickoff and Wrap Up steps on behalf of the employee's manager. The employee being reviewed *will not appear* as a direct report of the co-planner. The employee will remain a direct report of the manager.
- Co-planners who are added during Kickoff or Wrap Up can review expectations and goals for the employee they have been assigned by locating the **My Performance Action Items** box on the right side of the homepage.
- If a manager is absent long-term, consider updating the employee's manager in HR/CMS to allow the employee's temporary manager more complete MyPath functionality.
- If you are signing a form during Wrap Up on behalf of another manager, be sure to sign using your **own name**, as opposed to the manager for which you are a co-planner.