MyPath MassPerform

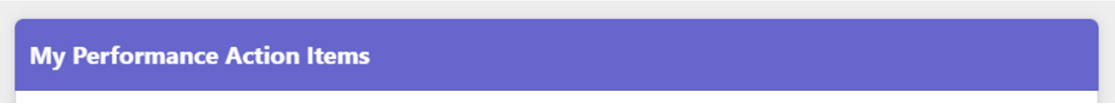
Manager: Add or Remove a Co-Planner

Add a Co-Planner

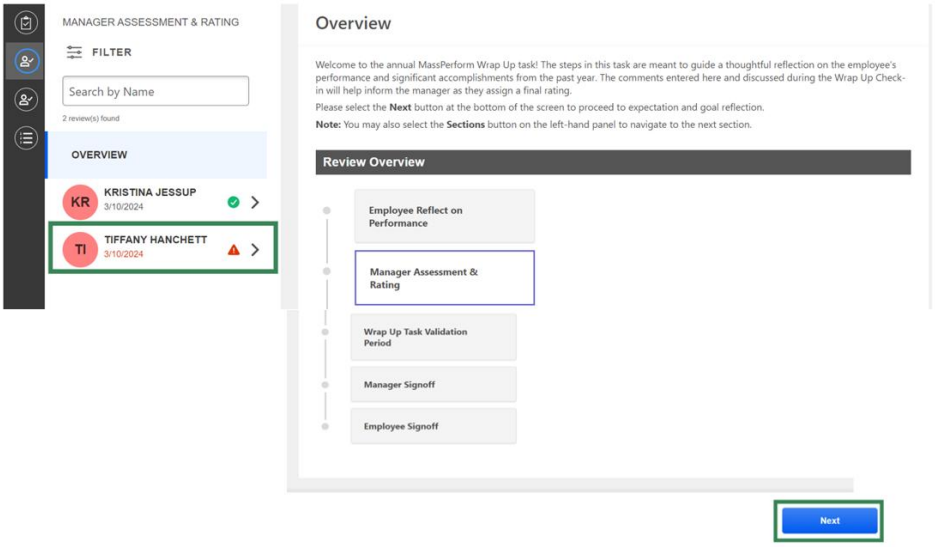
The following steps guide you through the process of adding or removing a co-planner to an employee's Kickoff or Wrap Up tasks. Managers who anticipate being unable to complete their steps of an employee's Kickoff or Wrap Up should add a co-planner to assume their responsibilities.

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

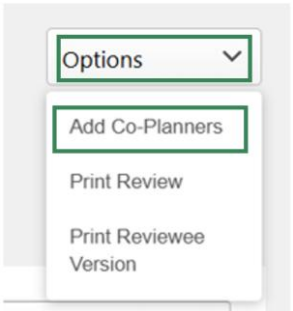
STEP 2. On the homepage, locate the **My Performance Action Items** box on the right side of the screen and click the **FYXX MassPerform [Kickoff or Wrap Up] for Your Team** link.



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.*



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.



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.



Remember: The manager, employee, and co-planner will all receive an email confirming that a co-planner 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.