Employee – Planning Session Classified

PLANNING SESSION JOB AID

A Planning Session must be completed by a manager **within 30 days of the effective date** in the following cases:

- A new Classified employee is hired.
- An employee begins a new position (e.g., promotion/demotion/change job).
- A new performance period begins.

SUMMARY

A Planning Session is the time when a manager should set major responsibilities, goals (minimum of three), and review the University-set competencies with their employee. For the Annual Evaluation to be initiated, the Planning Session cannot be in-progress. If the Planning Session is not completed, the Annual Evaluation will be blank. Check the Classified FAQ for specific questions related to this process.

Here is an overview of the process:

1 Manager	2 Manager's Manager	3 Planning Conversations (Manager)	4 Employee
At the beginning of each performance period or within 30 days of a new hire or change in job, complete a Planning Session for the employee(s) in Workday. Submit the Planning Session.	Review Planning Session. Can send back if they find inaccuracies, or they can approve the Planning Session.	Once approved, the manager should meet with the employee to review the Planning Session. The Planning Session cannot be submitted in Workday until the conversation with the employee has taken place or scheduled.	After the conversation with the manager, the employee will review the content of the Planning Session in Workday. Can send back if they find inaccuracies or approve the Planning Session.

MEET WITH YOUR MANAGER TO DISCUSS PLANNING SESSION

This is when your manager will have a conversation with you to discuss major responsibilities, goals (minimum of three), and review the University-set competencies.

REVIEW PLANNING SESSION

1. From your Workday My Tasks, locate your Planning Session.
2. Review the content of the Planning Session. Remember, the content of the planning session should have been discussed in a meeting between you and your manager.
3. You have the option to **Approve, Send Back,** or **Close** the Planning Session. To complete the process, click **Approve**.
    a. If the content is inaccurate or different from what you discussed with your manager, click **Send Back**.