PLANNING SESSION JOB AID

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

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

SUMMARY

The Planning Session is the time when you, as the manager, should set major responsibilities, review the University-set competencies, and determine goals with your employee. The information in the Planning Session will be used to set performance goals for the year. The Annual Evaluation will not be initiated if the Planning Session is still 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 the Planning Session for the employee(s) in Workday. Submit the Planning Session.	Review the Planning Session. There is the option to send back if there are inaccuracies, or the Planning Session can be approved.	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 Planning Session in Workday. There is the option to send back if there are inaccuracies, or the Planning Session can be approved.

START PERFORMANCE PLANNING DOCUMENT

1. From your My Tasks in Workday, locate the Planning Session.

You can save the Planning Session for later at any time in the process using the **Save** button! Always check your My Tasks to see where you left off.

ENTER MAJOR RESPONSIBILITES

At this step, you will be prompted to add the employee's major responsibilities. Major responsibilities should mirror the employee's job description.

1. Click **Add** to add a responsibility. Type the job responsibility in the text box. Repeat this step until all major responsibilities have been added.
   - To **delete** a responsibility, click the **"Remove"** button beneath the responsibility.
   - To **edit** the responsibility, click back into the text box of the responsibility you wish to edit.
2. Click **Next** once all the major responsibilities are listed.

REVIEW COMPETENCIES

At this step, you will be prompted to review the University-set competencies. These competencies **cannot** be modified.

1. Click **Next** to continue.

ENTER GOALS

At this step, you will be prompted to list **a minimum of three goals** for the employee to achieve during the performance period.

1. Click **Add** to list a goal for the employee.
   - If there are goals from past performance reviews that you would like the employee to continue working on, click the **prompt icon** on the **Add Existing** box and select the previous goal with the criteria of **Review**, **Status**, or **Category**.
   - To create a new goal, you must type the goal in the text box.
2. Select a category for the goal by clicking the **prompt icon** in the category section. The categories are:
   a. Departmental (specific to only your department)
   b. Experience Development
   c. Individual (specific to only this employee's job)
   d. Institutional (specific to only the institution)
   e. Performance Improvement
   f. Promotion/career
   g. Skill Development
3. Select a due date for the goal by clicking the **calendar icon** in the due date section.
4. The status section will be completed during the Annual Evaluation.
5. To add additional goals, click the **Add box** at the bottom of the page and repeat steps a-g from #2.
   a. To **delete** a goal, click the **"Remove"** button beneath the goal.
      i. Goals created during that Planning Session may be deleted. Goals carried over from a previous Annual Evaluation or Planning Session should not be deleted. If a goal that has been carried over is no longer relevant, you can mark the goal as "not applicable".
   b. To **edit** a goal, click into the text box of the goal you wish to edit.
6. Click **Next** to continue.

REVIEW PLANNING SESSION PRIOR TO SUBMISSION

1. The next page will prompt you to review the information in the Planning Session. Once reviewed, you will have the option to click **Submit** or **Save for Later**. Click **Submit** to send the Planning Session to your manager for review.

REVIEW BY MANAGER'S MANAGER

1. The manager's manager of the employee then receives the Planning Session in their My Tasks in Workday and has the option to **Approve, Send Back,** or **Close**.
   a. If they choose to send back, they will be required to provide comments for you to revise the Planning Session accordingly. Once you have made revisions, you will be able to re-submit it for approval. It will then route back to your manager for an additional review.

CONDUCT PLANNING SESSION CONVERSATION

Once approved, you **MUST** have a meeting with your employee to discuss the content of the Planning Session.

SUBMIT THE PLANNING SESSION

Once you and the employee have had a conversation regarding the contents of the Planning Session, you will be able to submit the Planning Session to the employee in Workday.

1. From your My Tasks in Workday, locate the Planning Session.
2. Click **Submit** to send the content to the employee.

EMPLOYEE LAST STEP

1. The employee will receive the Planning Session in their My Tasks in Workday, and they will be able to **Send Back** or **Approve**.