

PLANNING SESSION JOB AID

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

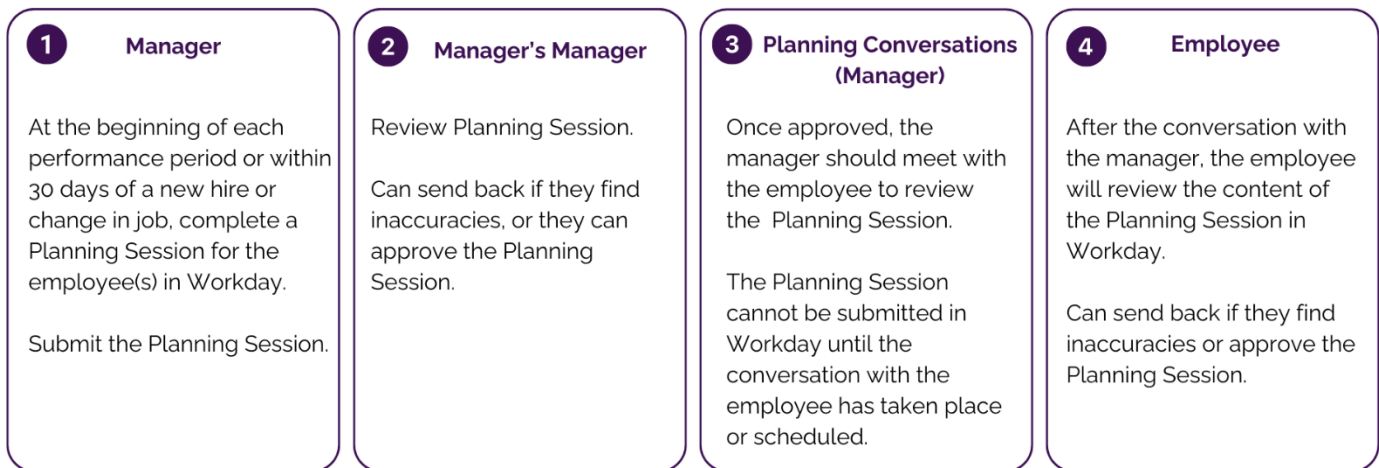
- A new Classified employee is hired.
- An employee begins a new position (e.g., promotion/demotion/change job).
- A new performance period begins.

Please Note: All Classified employees who are hired, or have a change job, on or after November 1, 2024, will not receive a Planning Session until January 1, 2025.

SUMMARY

A Planning Session is the time when a manager should set major responsibilities, goals, 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:



MANAGER'S MANAGER APPROVAL

This is when you, as the manager's manager, will review the Planning Session and, can send back if edits are needed, or approve to return the Planning Session to the manager for them to then meet with the employee.

REVIEW PLANNING SESSION

1. From your Workday My Task, locate the Planning Session.
2. Review the content of the employee's Planning Session. You will have the option to **Approve, Send Back, or Close**. If the content is **correct** and you would like to continue the process, click **Approve**.
 - a. If any **edits** need to be made by the employee's manager, click **Send Back**.
 - b. You will be required to provide a reason. Type the **reason** in the text box and click **Submit** to send back to the employee's manager.