



How to Use the Co-Planner Feature in Performance Evaluations


Reviewing Leaders have the option to add a **Co-Planner** to an evaluation.

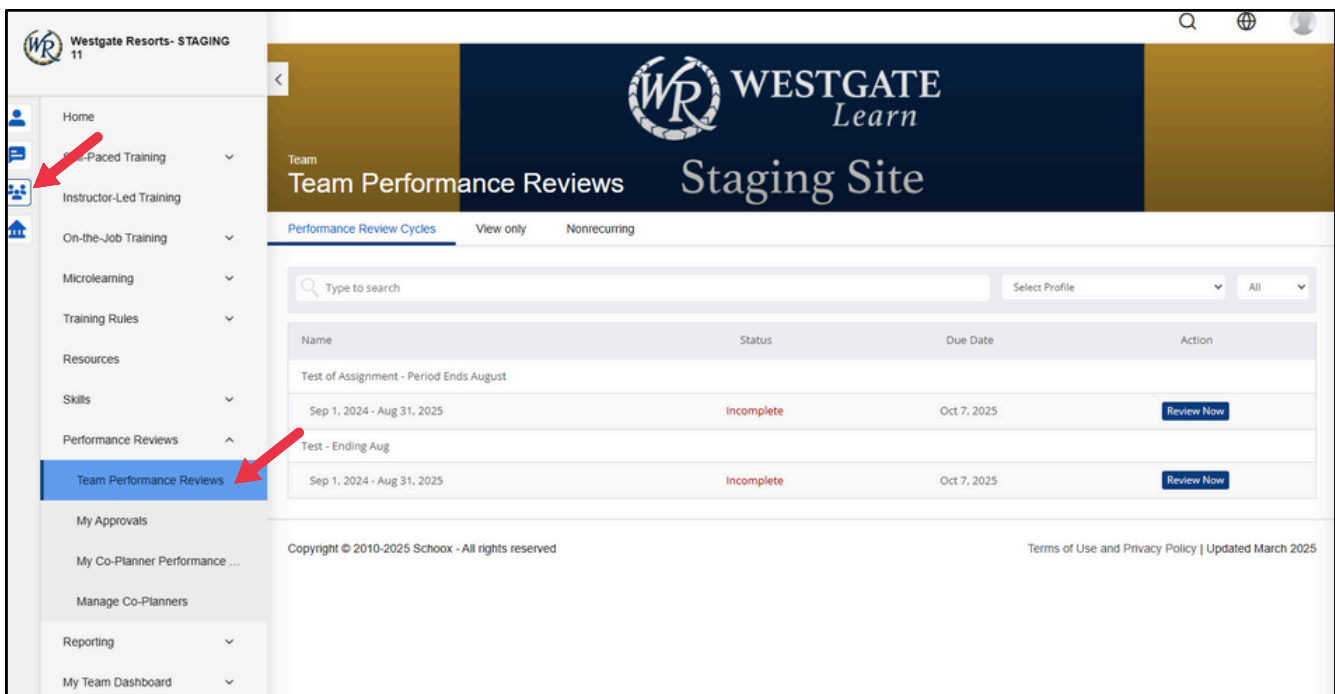
- A **Co-Planner** assists in the performance evaluation process by contributing valuable insights.
- They'll receive a performance evaluation form, and the reviewer can see what they wrote after it's done.
- Up to three (3) **Co-Planners** can be added to a performance evaluation.

You may want to use a **Co-Planner** when:

- The Team Member being reviewed reports to multiple leaders.
- The Team Member was recently transferred and spent part of the review period reporting to a different leader.

Note: The Co-Planner cannot release the Performance Evaluation. Only the original Reviewing Leader (the Team Member's Manager as reported in ADP) can release the evaluation.

To **Add a Co-Planner**, click the  icon to go the **Team** view, click **Performance Reviews**, and then **Team Performance Reviews**.



The screenshot shows the Westgate Learn Staging Site interface. On the left is a navigation menu with the following items: Home, Self-Paced Training, Instructor-Led Training, On-the-Job Training, Microlearning, Training Rules, Resources, Skills, Performance Reviews (expanded), Team Performance Reviews (highlighted with a red arrow), My Approvals, My Co-Planner Performance..., Manage Co-Planners, Reporting, and My Team Dashboard. The main content area is titled 'Team Performance Reviews' and 'Staging Site'. It features a search bar, a 'Select Profile' dropdown, and a table of performance review cycles. The table has columns for Name, Status, Due Date, and Action. Two rows are visible, both with a status of 'Incomplete' and a due date of 'Oct 7, 2025'. Each row has a 'Review Now' button. A red arrow points to the 'Team Performance Reviews' link in the navigation menu.

Name	Status	Due Date	Action
Test of Assignment - Period Ends August			
Sep 1, 2024 - Aug 31, 2025	Incomplete	Oct 7, 2025	Review Now
Test - Ending Aug			
Sep 1, 2024 - Aug 31, 2025	Incomplete	Oct 7, 2025	Review Now

Continued on next page.











Click **Review Now**.

Performance Review Cycles			
View only		Nonrecurring	
Type to search		Select Profile	All
Name	Status	Due Date	Action
Test of Assignment - Period Ends August			
Sep 1, 2024 - Aug 31, 2025	Incomplete	Oct 7, 2025	Review Now
Test - Ending Aug			
Sep 1, 2024 - Aug 31, 2025	Incomplete	Oct 7, 2025	Review Now

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- You will see all of your direct reports that have been assigned this evaluation.
- Click **Manage Co-Planners**.

Performance Review Cycles			
View only		Nonrecurring	
Incomplete Completed		Selected Performance Review Cycle: Test - Ending Aug - Sep 1, 2024 - Aug 31, 2025	
Type to search		Sort by: Name (A-Z)	Manage Co-Planners
Name	My Performance Review Status	Due Date	Action
 Angela Rodway	Incomplete	Oct 7, 2025	Review Now
 Anniella Diniz Delucas	Incomplete	Oct 7, 2025	Review Now
 Genesis Benitez-Perez	Incomplete	Oct 7, 2025	Review Now
 Linette Morales-Morales	Incomplete	Oct 7, 2025	Review Now
 Robert Suarez Espinoza	Incomplete	Oct 7, 2025	Review Now
 Scarlett Mancio	Incomplete	Oct 7, 2025	Review Now
 Stephanie Brogna Caudell	Incomplete	Oct 7, 2025	Review Now
 Stephanie Diehl	Incomplete	Oct 7, 2025	Review Now

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Click the **Check Box** next to the names of Team Members who you would like to assign a Co-Planner to.

[Go back to performance review profiles](#)

Test - Ending Aug

Add a co-planner to a performance review

A co-planner assists in the performance review process by contributing valuable insights. They'll receive a performance review form, and the reviewer can see what they wrote after it's done. Up to three co-planners can add to a performance review. To keep things organized, requests to add the reviewee, reviewer, or existing co-planners to the performance review will not be processed.






Show
All

Search
Type to Search

From
Start date

To
End date

(3 Selected) Add co-planner

Name	State	Cycle	Reviewer	Co-Planners
<input checked="" type="checkbox"/>  <div> Genesis Benitez-Perez Head of Manager - Genesis Benitez-Perez - 50242 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input checked="" type="checkbox"/>  <div> Stephanie Brogna Caudell Head of Manager - Stephanie Brogna Caudell - 50136 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input checked="" type="checkbox"/>  <div> Stephanie Diehl Head of Manager - Stephanie Diehl - 59642 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input type="checkbox"/>  <div> Anniella Diniz Delucas Head of Manager - Anniella Diniz Delucas - 11007 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	0 >
<input type="checkbox"/>  <div> Scarlett Mancio Head of Manager - Scarlett Mancio - 50854 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	0 >

Continued on next page.



Click **Add Co-Planner**.

[Go back to performance review profiles](#)

Test - Ending Aug

Add a co-planner to a performance review

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Show
All

Search

From

To

(3 Selected) **Add co-planner**

Name	State	Cycle	Reviewer	Co-Planners
<input checked="" type="checkbox"/>  <div> Genesis Benitez-Perez Head of Manager - Genesis Benitez-Perez - 50242 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input checked="" type="checkbox"/>  <div> Stephanie Brogna Caudell Head of Manager - Stephanie Brogna Caudell - 50136 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input checked="" type="checkbox"/>  <div> Stephanie Diehl Head of Manager - Stephanie Diehl - 59642 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 >
<input type="checkbox"/>  <div> Anniella Diniz Delucas Head of Manager - Anniella Diniz Delucas - 11007 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	0 >
<input type="checkbox"/>  <div> Scarlett Mancio Head of Manager - Scarlett Mancio - 50854 </div>	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	0 >

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Type the name of the **Co-Planner** that you would like to add.

Note: Co-Planners must have direct reports in ADP. Team Members who do not have this permission in Westgate Learn are not eligible to be co-planners for an evaluation.

Add Co-Planner

Search by Name

Save

Cancel

Click **Save** to add the Co-Planner.

Add Co-Planner

Dorlan Collie

Save





Cancel

Continued on next page.



- You can verify that the Co-Planner has been added by clicking the drop down > icon.
- The state will show as:
 - **Released** once the Co-Planner has submitted their evaluation.
 - **Draft** if the Co-Planner has not submitted their evaluation.

(0 Selected)

Name	State	Cycle	Reviewer	Co-Planners
<input type="checkbox"/>   Genesis Benitez-Perez Head of Manager - Genesis Benitez-Perez - 50242	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1 
Co-Planner name	State	Due date	Action	
 Dorlan Collie	Released	Oct 7, 2025	<button>Remove</button>	

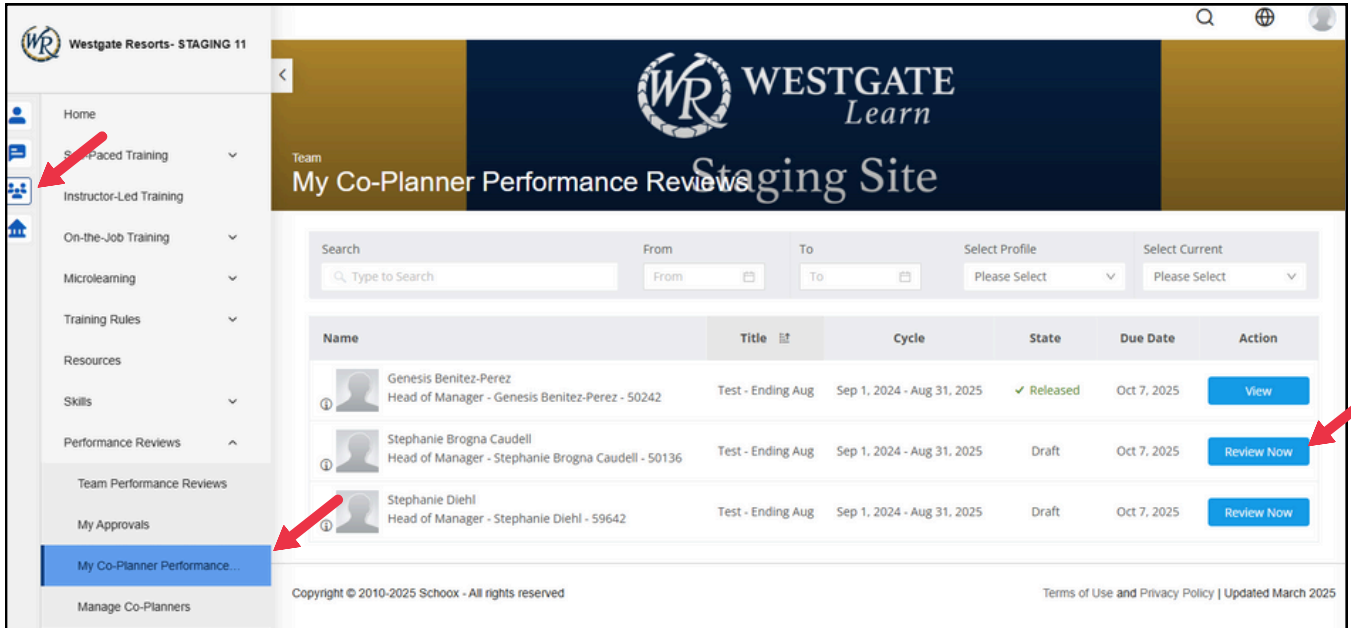
☐ Stephanie Brogna Caudell Head of Manager - Stephanie Brogna Caudell - 50136	Draft	Sep 1, 2024 - Aug 31, 2025	Gabriela Munoz	1
Co-Planner name	State	Due date	Action	
Dorlan Collie	Draft	Oct 7, 2025	Remove	

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How to Submit a Performance Evaluation as a Co-Planner

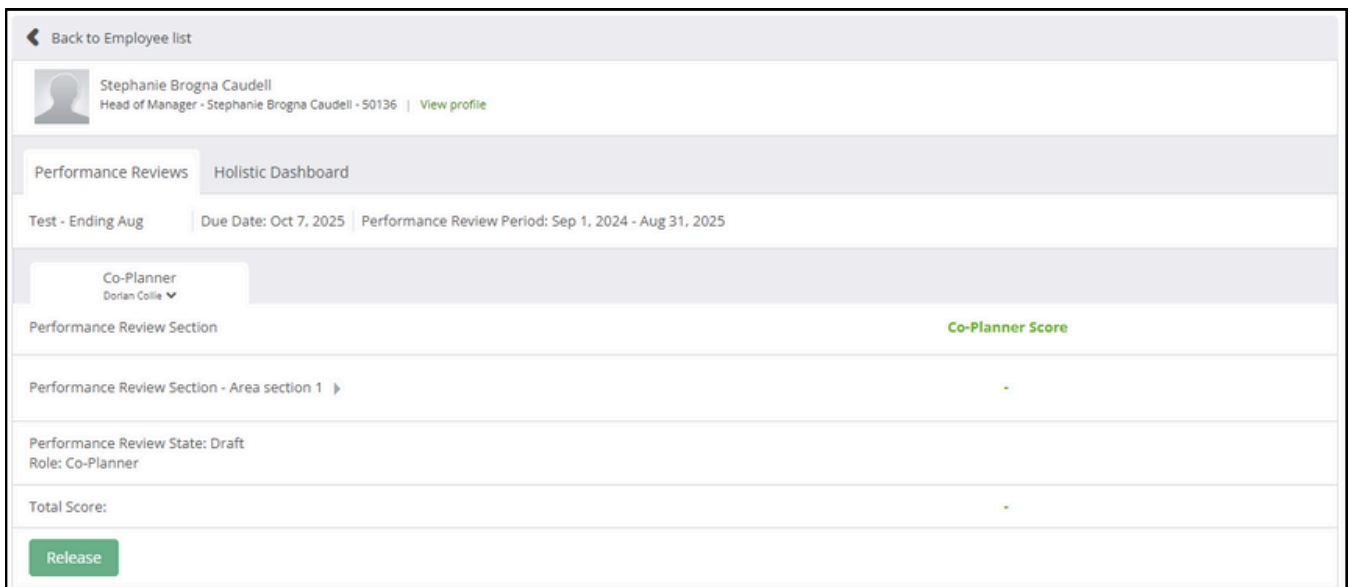
- Co-Planner Evaluations can be found in the **Team View** → **Performance Reviews** → **My Co-Planner Performance Reviews**.
- Click **Review Now** to begin the Co-Planner Evaluation.



The screenshot shows the Westgate Learn interface. On the left is a navigation menu with options like Home, Self-Paced Training, Instructor-Led Training, On-the-Job Training, Microlearning, Training Rules, Resources, Skills, Performance Reviews, Team Performance Reviews, My Approvals, My Co-Planner Performance..., and Manage Co-Planners. A red arrow points to 'My Co-Planner Performance...'. The main content area is titled 'My Co-Planner Performance Reviews' and contains a table with the following data:

Name	Title	Cycle	State	Due Date	Action
Genesis Benitez-Perez Head of Manager - Genesis Benitez-Perez - 50242	Test - Ending Aug	Sep 1, 2024 - Aug 31, 2025	Released	Oct 7, 2025	View
Stephanie Brogna Caudell Head of Manager - Stephanie Brogna Caudell - 50136	Test - Ending Aug	Sep 1, 2024 - Aug 31, 2025	Draft	Oct 7, 2025	Review Now
Stephanie Diehl Head of Manager - Stephanie Diehl - 59642	Test - Ending Aug	Sep 1, 2024 - Aug 31, 2025	Draft	Oct 7, 2025	Review Now

Red arrows point to the 'Review Now' buttons for Stephanie Brogna Caudell and Stephanie Diehl. The footer includes 'Copyright © 2010-2025 Schoox - All rights reserved' and 'Terms of Use and Privacy Policy | Updated March 2025'.



The screenshot shows the 'My Co-Planner Performance Review' form for Stephanie Brogna Caudell. The form includes a 'Back to Employee list' link, a profile picture, and the following information:

- Performance Reviews** | **Holistic Dashboard**
- Test - Ending Aug | Due Date: Oct 7, 2025 | Performance Review Period: Sep 1, 2024 - Aug 31, 2025
- Co-Planner**: Dorian Collie
- Performance Review Section**: Co-Planner Score
- Performance Review Section - Area section 1**: -
- Performance Review State**: Draft
Role: Co-Planner
- Total Score**: -
- [Release](#) button

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What's next?

The **Co-Planner** can follow the **How to Submit a Performance Evaluation** Quick Reference Guide to submit their evaluation.

This will provide an additional perspective for the **Reviewing Leader** to consider.


- When the Reviewing Leader enters the Team Member's Performance Evaluation, they will see a third column labeled **Co-Planner Score**.
- They can click the **Co-Planner tab** to view the scores and comments submitted by the co-planner.
- The Reviewing Leader must still submit the evaluation and release it.


[Back to Employee list](#)



Genesis Benitez-Perez
 Head of Manager - Genesis Benitez-Perez - 50242 | [View profile](#)
 Last snapshot: Sep 18, 2025 12:45 PM

[Performance Reviews](#)
[Holistic Dashboard](#)

Test - Ending Aug | Due Date: Oct 7, 2025 | Performance Review Period: Sep 1, 2024 - Aug 31, 2025
 

<div> <div>Manager</div> <div>Gabriela Munoz</div> </div>	<div> <div>Co-Planner</div> <div>Dorian Collie</div> </div>	Employee 	
Performance Review Section	Manager Score	Co-Planner Score	Employee Score
Performance Review Section - Area section 1 ▶	4	4	-
Performance Review State: Draft Role: Reviewer			
Total Score:	4	4	

[Release](#)