

How to Guides - Manager

Add a co-planner to Review/Check In

Step 1: Go to the review/check in and click 'Options' & 'Add Co-Planners'

Step 2: Type in the Co-Planners name in the text box and then select this person. Click 'Save'

Note:

- An automatic email will be sent to the co-planner requesting for them to complete the check in.
- If a co-planner is yet to make a comment do not press submit. Both Managers need to click on 'Save and Exit' until both Managers have made their comments.

