



Supervisor: How to Copy Job Duties from a Prior Year to One or More Employees

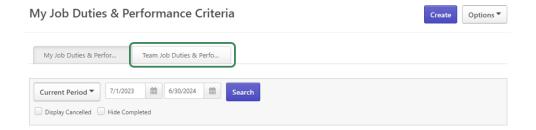
The following steps guide a *supervisor* through copying over goals from a prior fiscal year to the present fiscal year performance review. This can be completed for one employee at a time, or for multiple if their job duties are the same. For detailed video instructions, please watch the 3-minute <u>video demonstration here</u>.

- STEP 1. Sign in to your MyPath account at mass.csod.com (Login is your employee ID).
- STEP 2. On the homepage, locate the Job Duties & Performance Criteria or MassPerform Expectations & Goals button.



Note: If you personally participate in EPRS as an employee, this button will read as **Job Duties & Performance Criteria**. If you personally participate in MassPerform as an employee, this button will read as **MassPerform Expectations & Goals**.

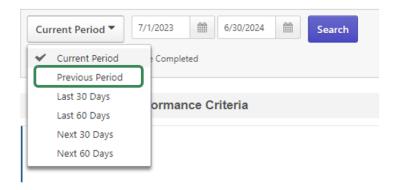
STEP 3. Click the Team Job Duties & Performance Criteria tab.



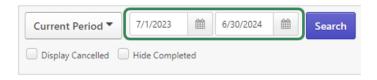
Note: If you are a MassPerform employee, this tab will appear as **Team Expectations & Goals** due to your system configuration.

STEP 4. Adjust the period either by opening the **Current Period** dropdown menu or by adjusting the performance review period **Start Date** and **End Date**. Then click the **Search** button to view results.

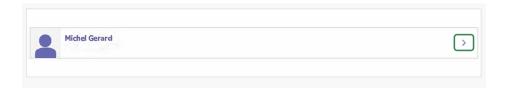
If the desired job duty was used in the previous period, you may open the drop-down menu by clicking **Current Period**. Then, from the menu click the **Previous Period** option.



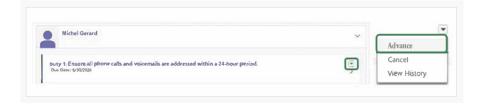
Alternatively, you may manually adjust the performance review period. Select a **Start Date** and an **End Date** to capture the performance review period of interest. You can either type into the applicable text boxes or select the **Icon Calendar** buttons to adjust these dates.



STEP 5. The screen will populate with all your direct reports. Locate the employee of interest and click the **Expand User Goals** dropdown button to the right of their name.



STEP 6. The dropdown menu will expand to show you all duties assigned to the employee for the applicable review period. Click the **Goal Options** dropdown button and then select the **Advance** option.



Important Note: Do not select the **Cancel** option.

STEP 7. A new screen will open titled **Create Job Duty and Performance Criteria**. At this time any necessary updates can be made.

Note: If you are a MassPerform employee, this page will appear as the Create Expectations & Goals screen due to your system configuration. The Job Duty will appear in the Manager Expectation textbox and the Performance Criteria will appear in the in the Description textbox. You will also have one additional step, select an Expectation Category from the dropdown menu. Please select the EPRS Duty & Performance Criteria option. Once submitted, the system will convert the information into the standard EPRS format on the performance review.

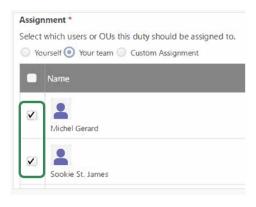
STEP 8. Under the **Assignment** section, select the **Your Team** radio button.



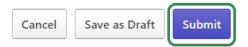
Note: The **Start Date** and **End Date** should automatically be set to the current review period. Do not alter these dates.

Note: Never select the Direct and Indirect Reports checkbox.

STEP 9. Click the checkbox next to each employee who this job duty & performance criteria apply to.



STEP 10. Click the Submit button.



Supervisor: How to Submit a Draft Job Duty

- STEP 1. Sign in to your MyPath account at mass.csod.com (Login is your employee ID).
- STEP 2. On the homepage, locate the Job Duties & Performance Criteria or MassPerform Expectations & Goals button.

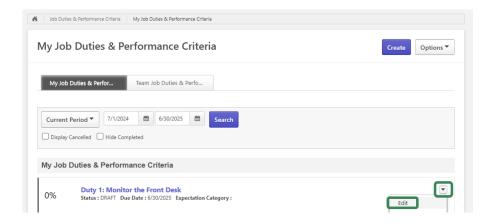


Note: If you personally participate in EPRS as an employee, this button will read as **Job Duties & Performance Criteria**. If you personally participate in MassPerform as an employee, this button will read as **MassPerform Expectations & Goals**.

STEP 3. In your My Job Duties & Performance Criteria tab, scroll down until you locate the draft Job Duty.

Note: If you personally participate in MassPerform, this will be called the **My Expectations & Goals** tab.

STEP 4. Click the **Goal Options** dropdown button and then select the **Edit** menu item.



STEP 5. Review and edit the Job Duty as needed.

Note: Do not alter the **Start Date** and **Due Date** as it defaults to the applicable performance review period.

STEP 6. Ensure that the correct employee or employees have been selected under the **Assignment** section.



Note: Never select the **Direct and Indirect Reports** checkbox.

STEP 7. Click the **Submit** button to add the duty to the performance review or click the **Cancel** button to return to the prior screen.