



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 video demonstration here.

- 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.

My Job Duties & Performance Criteria	Create Options
My Job Duties & Perfor	
Current Period ▼ 7/1/2023 6/30/2024 Image: Search Display Cancelled Hide Completed	

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.

Current Period 🔻	7/1/2023	6/30/2024		Search
Display Cancelled Hide Completed				

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.

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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.

Important 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 Due Date should automatically be set to the current review period. Do not change these dates *unless* the employees are in a Stretched review cycle.

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.

Cancel	Save as Draft	Submit

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.

Notes: 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.

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My Job Duties & Performance Criteria	Create Options *
My Job Duties & Perfor Team Job Duties & Perfo	
Current Period ▼ 7/1/2024 1 6/30/2025 1 Search Display Cancelled Hide Completed	
My Job Duties & Performance Criteria	
O% Duty 1: Monitor the Front Desk Status : DRAFT Due Date : 6/30/2025 Expectation Category :	Edit

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

Note: The Start Date and Due Date should automatically be set to the current review period. Do not change these dates *unless* the employees are in a Stretched review cycle.

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

Assignmer	nt *		
Select whic	h users or OUs this goal should be assigned to.		
O Yourself	f 💿 Your team 🔘 Custom Assignment		
Nar	ne	Title	Direct and Indirect Reports
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Important: 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.