



Introduction to the Employee Performance Review System (EPRS)

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What's Included in this Guide

This comprehensive guide describes the procedures and policies integral to the Employee Performance Review System (EPRS) – whether you are participating in EPRS as an employee, supervisor, or reviewer. The guide provides a step-by-step breakdown of the three stages of EPRS and gives detailed instructions on how to prepare for each stage. Additionally, it offers guidance on conducting the requisite employee meetings, a required and crucial component of the EPRS process.

Visit the [EPRS webpage](#) for additional resources and guides.

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EPRS Overview

What is EPRS?

The Employee Performance Review System (EPRS) is a performance evaluation program designed to improve productivity by increasing communication between employees and their supervisors.

EPRS was designed to inform employees of the following:

- How their job fits into the agency's mission, goals, and objectives
- What is expected of the employee on the job
- How success is defined
- What can be done to improve job performance

Employee performance evaluation is required by Massachusetts General Law. The evaluation method was developed and negotiated through Collective Bargaining with the Unions.

What is the Purpose of EPRS?

EPRS is designed to encourage open conversations regarding performance by providing a structured formal meeting outline with relevant guidance throughout the performance evaluation year. The purpose of EPRS is to provide employees with the knowledge necessary to understand what is expected of them and how to perform successfully within their role in the Commonwealth.

The final evaluation form becomes part of an employee's permanent personnel record and is often used by an agency when making decisions on issues such as:

- Step raises and/or salary increases
- Promotions and job assignments
- Job training or development
- Disciplinary actions

MyPath System

Starting on July 1, 2024, the Employee Performance Review System (EPRS) for bargaining unit and confidential employees will be hosted in the Commonwealth's performance and learning hub, **MyPath!*** MyPath serves as a central resource for supervisors, employees, and reviewers to complete performance management tasks and access learning and training tools. *MyPath* will:

- ✓ Support the alignment of job duties and performance criteria along with optional employee-led development planning.
- ✓ Allow all parties to electronically sign the form.
- ✓ Automatically generate personal action-oriented communications during the review cycle to help users remember key dates and tasks.

*For non-participating agencies, the [paper form](#) is available for use. If you have questions regarding whether or not your agency is participating, please contact your EPRS Coordinator.

Please note that MyPath is not the system of record. The employee's personnel file will remain the system of record for EPRS per Massachusetts General Law.

Participants

Bargaining unit and confidential employees receive performance reviews under EPRS. This includes bargaining unit seasonal employees. Within each EPRS, there are three participants, the employee, the supervisor, and the reviewer.

Employee: The bargaining unit or confidential employee being evaluated.


Supervisor: An employee's direct supervisor who is responsible for conducting their performance review.

Reviewer: The employee's indirect manager (their supervisor's supervisor). The reviewer determines the final rating during Stage C.

EPRS Cycles

There are three cycles for EPRS: Standard, Compressed, and Stretched. Pre-existing employees will follow the Standard Cycle. New hires hired after the 1st of July but before March 30th will follow the Compressed Cycle. Lastly, new hires hired on March 31st will follow the Stretched Cycle.

Cycles & Timeframes	Standard	Compressed	Stretched
	<p>This cycle is for employees* who are not new hires.</p> <p>Stage A begins in July</p> <p>Stage B begins in January</p> <p>Stage C begins in June</p>	<p>This cycle is for employees* who are new hires, hired before March 31st.</p> <p>Stage A begins upon start</p> <p>Stage B begins half-way to June</p> <p>Stage C begins in June</p>	<p>This cycle is for employees* who are new hires, hired on or after March 31st.</p> <p>Stage A begins upon start</p> <p>Stage B begins in January</p> <p>Stage C begins in June</p>



*Employees refers to bargaining unit and confidential employees.

The Three Stages of EPRS

As illustrated below, the Employee Performance Review System has three phases that occur throughout the performance evaluation year. They consist of:

- Performance Planning (Stage A)
- Progress Review (Stage B)
- Annual Review (Stage C)

EPRS begins with planning where job duties are defined. Then it leads into the progress phase, where performance is assessed at a designated mid-point. And then finally there is the annual review where overall performance is evaluated.

Stage A- Performance Planning

Performance Planning, or Stage A, occurs at the beginning of each evaluation year. During Stage A, the supervisor and employee meet to discuss what the job duties are for the position and how to successfully perform those duties through defined performance criteria.

For additional information on Stage A, please refer to the [Stage A Planning Guide](#).

Note: At least two informal check-ins are recommended between each stage.

Stage B- Progress Review

Halfway through the year the supervisor and employee meet for a formal Progress Review. During this meeting, the supervisor will give the employee an Advisory Rating on performance thus far. Together they will look for ways to improve performance, if needed. Following the completion of Stage B, informal review sessions should continue until the end of the year.

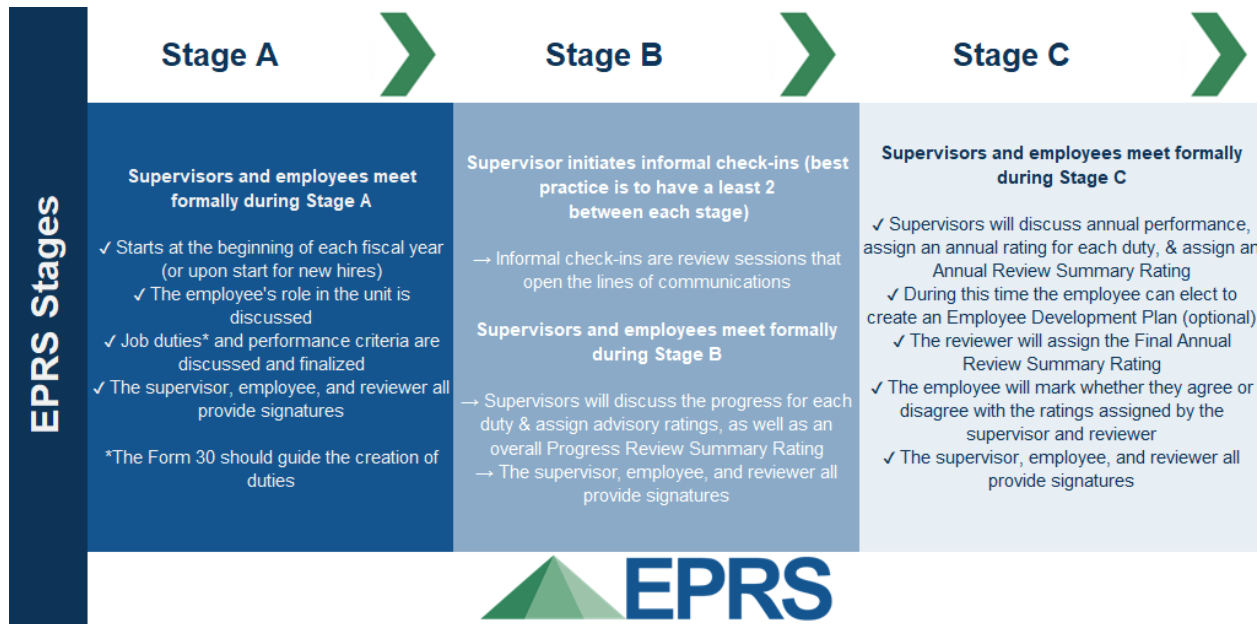
For additional information on Stage B, please refer to the [Stage B Progress Review Guide](#).

Note: At least two informal check-ins are recommended between each stage.

Stage C- Annual Review

This is the final stage and occurs at the end of the evaluation year. The supervisor and employee review and evaluate the employee's performance over the entire year. The supervisor rates the performance for each duty and then assigns an Annual Review Summary Rating. It is during this stage that the employee may elect to create an Employee Development Plan (optional). During this stage, the final annual rating is determined by the reviewer. The development plan is created jointly between the supervisor and employee to plan for the next year.

For additional information on Stage C, please refer to the [Stage C Annual Review Guide](#).



The [EPRS training resources webpage](#) provides access to job aids to guide you through each of the three stages.

EPRS Vocabulary

Supervisor: An employee's direct supervisor who is responsible for conducting their performance review.

Employee: The bargaining unit or confidential employee being evaluated.

Reviewer: The employee's indirect manager (their supervisor's supervisor). The reviewer determines the final rating during Stage C.

Job Duty: A primary job duty from the employee's most current Position Description/Form 30.

Performance Criteria: Observable, realistic, clear criteria that define how an employee is to be successful in completing the applicable job duty.

Employee Development Plan (EDP): An optional employee lead development plan offered to the employee during Stage C to be completed in the upcoming fiscal year.

Remedial Development Plan (RDP): A development plan created for employees who receive overall "Below" Progress Review Summary Ratings and/or Annual Summary Review Ratings.

How are Employees Rated?

Employees are rated on how well they complete their job duties based on the defined performance criteria. They will be rated twice during the year, once at the Progress Review and again at the Annual Review.

To rate an employee, the supervisor should look at what the employee does and how it is done. The supervisor will compare this with what they and the employee discussed during Stage A. Then performance is rated on the defined rating scale: exceeds/excels, meets, and below.

The EPRS Rating Scale

Exceeds/Excels

Performance is greatly above the job requirements. Generally, the employee does well beyond the performance criteria, doing **outstanding** work. Job performance is excellent, and above and beyond what is expected of employees in this job. The employee requires less than usual supervision. Performance that exceeds criteria is due to the effort and ability of the employee. Any performance below criteria is minor or due to events not under the control of the employee. The employee's performance may have an important positive effect on how well the work group does overall. The employee's performance is **superior**.

Note: Supervisors must always explain an "Exceeds/Excels" rating.

Meets

Performance satisfies the job requirements. Generally, the employee performs according to the criteria, doing **a good job**. The employee is doing the job at the level expected for employees in this position. This good performance is due to the employee's own effort and ability. Usual levels of supervision are needed. The employee may make a strong contribution to meeting the work group's goals. A large number of employees will fall into this category. This rating includes a **broad range** of performance, from just **barely satisfactory** to **highly satisfactory**.

Below

Performance generally fails to meet criteria or requires extremely high levels of supervision. The employee is not doing the job at the level expected. Unsuccessful job performance is due to the employee's own lack of effort or ability. The employee's performance may hurt the performance of the work group overall. The employee's performance is **unsatisfactory**.

Note: Supervisors must always explain a "Below" rating. Additionally, "Below" ratings can be appealed. If a "Below" rating is assigned, a Remedial Development Plan must be created in response. If this rating is selected, 90-days' notice must be provided to the employee and the EPRS Coordinator should be contacted.

When a supervisor rates performance on one job duty, they should consider the criteria listed on the EPRS form for that duty.

Note: If a job duty is no longer performed, please select "N/A- Duty No Longer Performed"

The **overall** rating should not be a simple average of the ratings of the duties. Think about **all** of the duties assigned during the year. Some duties are more important and done more often than

others. These duties should be considered more in the overall rating. The overall rating should give your **bottom-line** evaluation of the employee's total work this year.

How will the Evaluation be Used?

After the final evaluation is completed, the signed form will become part of the employee's personnel record. The agency may use this performance evaluation when making personnel decisions about the employee. The evaluation should be *only one* of the things considered. Collective Bargaining Agreements should be followed carefully when making these decisions.

An agency may use the performance evaluation when:

- Deciding if an employee will get a step raise and/or salary increase/and or resources
- Taking disciplinary actions
- Making decisions about promotion and job assignment
- Determining necessary job training or development

What if an Employee Does not Agree with the Evaluation?

At the end of each stage, the performance review form is signed by the supervisor, employee, and reviewer. In addition, individuals are given the opportunity to provide comments related to the evaluation.

In Stage C, the employee is invited to express their perspective on the ratings provided by their supervisor and reviewer. The employee is presented with a drop-down box* to indicate their agreement or disagreement with their rating. They may also include any relevant comments. Following this, the employee is asked to sign the form. The employee's signature confirms receipt of the evaluation rather than signifying agreement with the evaluation.

Note: The employee has two days to review the evaluation prior to signing.

After the final evaluation, the employee has the right to appeal their rating. As outlined in the Collective Bargaining Agreements, if an employee receives a final overall rating of "Below," they are eligible to initiate an appeal with their appointing authority. Should the appeal yield no change to the rating, the employee may initiate an appeal to a Merit Arbitration Panel. This panel is comprised of one representative designated by the Union, one by the Chief Human Resources Officer, and one by the Chairperson of the Board of Conciliation and Arbitration.

Any appeals must be filed by the Union, to the Human Resources Division within twenty-one (21) days of the employee's receipt of a "Below" rating.

For employees with a civil service status, they must select either the Civil Service Commission (CSC) or the collective bargaining process for their appeal, not both. Non-civil service status employees may appeal via their collective bargaining process.

*Paper form users will have a checkbox option to select from and the option to attach comments to their review.

Employee Development Plan (EDP)

After the annual review rating at Stage C has been completed, employees and supervisors have the opportunity to discuss and create an **Employee Development Plan (EDP)** if the employee chooses so. An EDP is designed to help the employee learn new job skills that are relevant to the employee's current role, facilitate future career growth, or support general professional development.

While the decision to engage in an EDP rests with the employee, supervisors are encouraged to have development suggestions prepared in anticipation of employee interest. The reviewer or agency training staff may have development activity recommendations available for the supervisor. The supervisor is encouraged to discuss recommendations with the reviewer to ensure alignment.

It is crucial to bear in mind that development activities should only be pursued if they are feasible and can be provided. For instance, recommending attendance at a costly training program without available funds would lead to disappointment. This is why it is key for the supervisor to have recommendations prepared prior to the Annual Review meeting.

Should an employee opt to create an EDP, discussion between the supervisor and employee should include the following:

1. Clarifying the employee's goal and motivation behind creating the plan.
2. Reviewing available development activities, such as:
 - On-the-job training
 - Specific skill or technical training (i.e., memo writing, counseling, report creation)
 - Conferences or seminars relating to the job.
 - Career advancement training, (i.e., supervisory or management training)
 - Courses at state colleges and universities, by using the Tuition Remission Program for either single courses or while working towards a degree.
 - Courses developed as a result of the Collective Bargaining Agreements.
 - Career counseling sessions.
 - MassAchieve training courses*
3. Ensuring that any selected training or development program aligns with the agency.
4. Discussing support mechanisms if the employee opts to self-fund education or training.
5. Keeping in mind that the development plan should contribute to the employee's growth in their current job or readiness for future job responsibilities.

Note: The EDP is available in MyPath to employees, supervisors, and reviewers. After the Stage C task is assigned in MyPath, a copy of the EDP should be uploaded to the employee's evaluation.

Note: If your agency is not participating in EPRS via MyPath the [paper EDP form](#) is available for use. Please be sure to attach a copy of the EDP to the employee's evaluation.

*MassAchieve training can be assigned within the Employee Development Plan template in MyPath by using the learning connection.

Remedial Development Plan (RDP)

The [Remedial Development Plan \(RDP\)](#) is a structured framework designed to support employees who receive a **Below** rating at either Stage B Progress Review and/or Stage C Annual Review. The purpose of an RDP is to provide additional assistance to improve performance. RDPs are collaboratively developed between the supervisor and the employee to address areas needing improvement.

Supervisors should give notice and begin coaching employees by April 1st if they anticipate giving a *Below* annual review rating.

Please note, confidential employees are not eligible for Remedial Development Plans.

Below are the guidelines for creating and implementing an effective RDP:

Leading up to Stage C:

- Employees nearing a “Below” rating should be counseled by their supervisor three months (90-days) in advance of Stage C to allow for ample time to change the performance trajectory. The goal is to work with the employee to help them attain a “Meets” or “Exceeds/Excels” rating.

Documentation:

- The RDP must be included in the employee’s personnel file.

Ongoing Evaluation:

- Employees with a “Below” rating will be re-evaluated 30 days after the completion of Stage B or Stage C.
- Employees are re-evaluated every 30 days until they have achieved a rating of “Meets” or “Exceeds/Excels”, or six months pass, whichever is first.

Note: When work-related circumstances occur over which the employee/agency has no control, the employee is not to be prevented from attaining an overall rating of “Meets” or “Exceeds/Excels.”

Compensation:

- Once the employee receives a “Meets” or “Exceeds/Excels” rating during the review process, they will become eligible for the denied step and/or denied salary increases. Salary increases will go into effect on the date that the employee receives the “Meets” or “Exceeds/Excels” overall rating.

Note: The employee’s anniversary date for step purposes will not be affected by this process.

- Any employee who may be adversely impacted by an untimely evaluation will be made

whole upon the completion of the performance review and upon achieving a final rating of “Meets” or “Exceeds/Excels.”

- All financial considerations (i.e., step rate increases) are based on the employee’s most recent, final annual evaluation.

Appeal Process:

During the thirty (30) day re-review, if the employee continues to receive “Below” ratings they have the ability to make a one-time appeal via the Merit Arbitration Board.

- This appeal must be filed within ten (10) days of the last review rating.
- Any decision in favor of the employee will be from the month of the appeal forward.
- Such an appeal may not be filed if the employee has already filed an appeal at the time of the final unsatisfactory review.

EPRS Support

Training and Resources

The [EPRS Training, Resources and Job Aids](#) page contains a variety of resources to support EPRS participants throughout the performance review cycle. It is recommended that participants visit this page to learn more before beginning each new EPRS stage.

MyPath

For assistance with the MyPath system, contact the Human Resources Division's Employee Service Center at 617-979-8500 or MyPath@mass.gov.

They may assist with:

- Password resets
- MyPath navigation
- Locating tasks in MyPath
- Printing performance reviews
- Adding co-planners
- & more

Coordinators

EPRS Coordinators are local subject matter experts in EPRS for their Agency or Secretariat. They are available for policy related questions pertaining to EPRS.

Visit the [EPRS Coordinator page](#) to identify your Agency or Secretariat's coordinator.