



## Manager: Set Expectations at Kickoff

The following steps guide a manager through the process of setting expectations for an employee at Kickoff. It is best practice to create 2 - 4 expectations per employee, and one should promote Diversity, Equity, and Inclusion. For detailed video instructions, please watch the 2-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 My Performance Action Items box on the right side of the screen and click the FYXX MassPerform Kickoff for Your Team link.

My Performance Action Items		
	Due Date	
FY25 MassPerform Kickoff for Your Team	5/20/2024	

STEP 3. You'll be brought to the **Overview** page. Review the on-screen instructions and then select the **Next** button at the bottom of the screen to proceed.

**Note:** You may also select the **Employee's Name** button on the left-hand panel to navigate between sections.

MANAGER SCHEDULE 1ST CHECK-IN & SET EXPECTATIONS	Please select the <b>Next</b> button at the bottom of the screen to proceed.  Note: You may also select the <b>Employee's Name or Sections</b> button on the left-hand panel to navigate between sections.		
🚔 FILTER	Review Overview		
Search by Name			
2 review(s) found	Manager Schedule 1st Check-in & Set Expectations		
OVERVIEW			
KRISTINA JESSUP 5/20/2024	Employee Enter Goals		
TI TIFFANY HANCHETT			
	Next		

STEP 4. You'll arrive at the Schedule 1<sup>st</sup> Check-in page. First, review the on-screen instructions and then determine the Date of First Check-in by clicking the calendar icon button. *Remember to manually send Outlook invites for the Kickoff Check-in and future meetings as MyPath is not currently integrated with Outlook.* 

Date of First	Chec	k-in
		*

STEP 5. Next, click the Select drop-down menu button to establish a Check-in cadence (quarterly at minimum).

(	Check-in Cadence Selected			
	Select •			
	~	Select		
		Quarterly (minimum)		
		Monthly		
		Biweekly		
		Weekly		

**STEP 6.** Click the **Save for Later** button at the bottom of the screen if you wish to save *without* advancing. Otherwise, click the **Next** button at the bottom of the screen to continue with setting expectations.

**Reminder:** Schedule your first check-in *before* entering expectations. Please take a moment to schedule this in Outlook with your employee(s) if you have not already done so.

STEP 7. If you choose to proceed, you'll arrive at the **Expectations and Goals** page. Click the **Add Expectation & Goals** button above the instructions to enter expectations.

Add Expectation & Goals

This will open a new screen – **Create Expectation & Goals.** Remember that *at least one expectation* that promotes diversity, equity, and inclusion (DEI) is required. Click the **Library** button on this screen to select a DEI expectation (or create your own). A **Library** pop-up box will open. Click the radio button next to your desired DEI expectation and click the **Import** button.

eate	e Expectation & Goals		Library
VAGEF Use t • Selec	<b>R:</b> he "Manager Expectation" and "Description" fields below to enter one expectation for the employee. Expectation can be brief but should be actionable for your employee. Check-in meetings are an opportunity for you to clarify expectations. t a start date, end date, and expectation category.		
e: If yo	u are an EPRS supervisor creating job duties for a direct report please visit the Snapshot Page.		
Selec	E: t "Add Goals" to enter your finalized SMART goals. Repeat for all goals necessary to meet this expectation.		
ibra	ry		×
Search Expectation Category  Search			
	Manager Expectation	Expectation Cate	gory
	Actively promote diversity across team assignments to engage team members and encourage diversity of perspective and thought.	Diversity	
	Collaborating with Diversity Directors, actively promote a culture of inclusion by engaging in roundtable discussions with staff to surface issues and employee concerns.	Diversity	
	Consciously raise awareness by increasing visible emphasis on Diversity, Equity, and Inclusion in agency communications and publications.		
$\bigcirc$	If your agency offers a mentoring program, actively participate as Mentee. Diversity		
	If your agency offers a mentoring program, actively support a rising diverse and under-represented staff member by serving as a Mentor.		
	Promote Diversity, Equity, and Inclusion through personal involvement in the agency's Employee Diversity		-
		Close	Import

STEP 8. On the Create Expectation & Goals screen, enter a title for each expectation in the Manager Expectation field. Please disregard this for the pre-populated diversity expectation if you used the Library feature.

Optional: Enter a **Description** of the expectation using the **Description** field.



STEP 9. Update the Start Date and Due Date for each expectation by using the calendar icon buttons.

Note: Please verify that the Start Date and Due Date are correct.

Start Date *		Due Date *	
7/1/2024		6/30/2025	

STEP 10. Click the Select drop-down menu button under Expectation Category to choose a category.

Note: This will auto-populate to "Diversity" if you use the Library feature for the diversity expectation.

Expectation Category *			
Select	•		

STEP 11. Click the Save button at the bottom of the Create Expectation & Goals screen to save that expectation.

**Reminder:** you are only setting the expectations. The employee will enter their corresponding goals for each expectation after you've submitted them so do **not** click the Add Goals button.

STEP 12. Repeat Steps 7 – 11 for each expectation. As a reminder, you should ideally set 2 – 4 expectations

for each employee. For detailed instructions, watch the two-minute video demonstration here.

- STEP 13. When all expectations have been entered, click the **Submit** button at the bottom of the screen.
- **STEP 14.** The **Submit Review** pop-up box will open. Click the **Submit Review** button *again* to automatically advance Kickoff to the employee, who will then enter their specific goals related to each expectation.

Repeat all steps for every subordinate.