MassPerform

Agency Coordinator Handbook

Updated July 10, 2025

This document acts as a guide for MassPerform Agency and Secretariat Coordinators. In addition to the Table of Contents, coordinators are encouraged to easily navigate within by searching keywords using the CTRL + F function on Windows devices or the Command + F function on Mac devices.

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Agency Coordinator Checklist

☐ Familiarize yourself with the Agency Coordinator Handbook

☐ Introduce yourself to your managers and identify yourself as a resource

☐ Review all MassPerform resources and maintain a strong understanding of MassPerform

☐ Attend quarterly Coordinator User Group meetings

☐ Coordinate training needs with the C&C team to assist your agency (when applicable)

☐ Periodically run compliance reports & contact individual managers who are not compliant

☐ Ensure accurate data in HR/CMS (i.e., ACES flag, “reports to” field, business emails)

☐ After Wrap Up, download & place completed performance reviews into personnel files

☐ Contact the ESC or your C&C analyst with any questions

What are Agency Coordinators and Secretariat Coordinators?

Agency Coordinators are local subject matter experts for the Executive Department’s Secretariats and Agencies. Throughout the performance review cycle, MassPerform Coordinators serve as a guide and additional resource for managers to assist their employees (manager-level direct reports).

Secretariat Coordinators maintain complete security and dashboard visibility across their agencies. If an agency were to participate in a merit pay program, they formally approve the compensation allocations. They receive a copy of the Coordinator’s performance form for possible calibration/rating adjustment. This is so you (the Coordinator) don’t validate your own performance form. **Please note:** The Secretariat Coordinator has *no day-to-day programmatic responsibilities*. These are normally SHROS or Senior Leaders for independent program participants.

On July 1, 2024, the Employee Performance Review System (EPRS) joined MyPath! If you are also an EPRS Coordinator, please review the EPRS Coordinator Handbook here.

Agency and Secretariat Coordinator Changes

If your Agency or Secretariat Coordinator changes, please ensure the HRD Classification & Compensation (C&C) team is notified right away. Email your C&C Analyst to request the change. Please detail in your email the following:

- First and last name of the **current** coordinator
- First and last name of the requested **new** coordinator
- Employee IDs of the current coordinator and new coordinator

- Affected agency(s) and secretariat

Agency Coordinator Responsibilities

- Field questions from agency managers and leadership on the MassPerform program.
    - Know who to turn to if you do not know the answer.
- Respond to management requests for coaching on performance issues and difficult conversations.
- Receive and review agency compliance reports from the MassPerform system.
    - Contact individual managers who have not completed assigned system entries
    - Provide agency leadership with compliance status
    - Assist C&C with achieving 100% agency compliance via targeted communications
- Maintain a strong understanding of the MassPerform model
    - Review all program materials
    - Attend user group meetings
    - Identify learning gaps and notify C&C to aid in future content development (e.g., job aids, handbooks)
- Knowledge of MassPerform deadlines
- Coordinate ongoing training needs with HRD
    - Partner with agency training departments to scale training opportunities
    - Identify any gaps in process or system onboarding for new managers
- Ensure accurate data in HR/CMS (e.g., ACES flag, “reports to”, and business emails)
- Review and obtain agency approval for compensation changes under the merit program (Bonus, PTO, and increases to base), *when applicable*
    - Eligibility for the program
    - Expected rating distributions and calibration
    - Merit in line with program guidelines

Scope of Agency Coordinators' Role

Coordinators are responsible for fielding questions from managers and escalating those to the Employee Service Center (ESC) or your C&C Analyst when/where applicable. Coordinators should periodically run dashboard reports and standard reports to assist C&C with achieving 100% compliance!

As a coordinator, you should feel equipped to either a) answer the question, b) identify a resource such as a training video or job aid that they can share with the manager, or c) know whom to contact should they need to escalate the question on the manager's behalf.

It is **not** within a coordinator's scope to proxy in as managers in MyPath or make any changes on the manager's behalf.

It **is** within the coordinator's scope to make themselves aware of the current fiscal year's respective deadlines and general timeline (e.g., Kickoff and Wrap Up).

It **is** within the coordinator's scope to review all training, resources, and job aids, and to address any managers' questions correctly and efficiently.

It **is** within the coordinator's scope to print performance reviews at the end of the fiscal year and place in an employee's personnel file (paper or virtual).

Assistance for Coordinators

The MassPerform platform is supported by MyPath; however, Coordinators are **not** MyPath system experts. If *MassPerform users* need technical support, please refer them to the Employee Service Center, email MyPath@mass.gov, or call (617) 979-8500. If you (the coordinator) need support, contact the C&C Analyst for the Secretariat/Agency requesting support.

When reaching out to your analyst, it is best practice *not* to include the employee. This helps prevent the employee from directly reaching out to the analyst in the future as we want to ensure employees are going through their managers who are then going through their coordinator or the ESC.

- ESC
    - Submit a ticket for MyPath support such as general navigational assistance, password reset, missing action items, etc.

- Your Secretariat's C&C Analyst for *policy and eligibility-related* questions:
    - Adele Jean
        - Executive Office of Public Safety and Security (EOPSS)
        - Executive Office of Labor and Workforce Development (EOLWD)
        - Executive Office of Economic Development (EOED)
        - Executive Office of Housing and Livable Communities (EOHLC)

- [David Wiggins]
  - Executive Office of Administration and Finance (EOAF)

- [Lexi McInnis]
  - Executive Office of Technology Services and Security (EOTSS)
  - Executive Office of Veterans' Services (EOVET)
  - Executive Office of Health and Human Services (EOHHS) **for the following agencies only:**
    - Dept of Mental Health (DMH)
    - Dept of Developmental Services (DDS)
    - Dept of Public Health (DPH)
    - Exec Office of Health and Human Services (EHS)
    - Commission for the Blind (MCB)
    - Commission for the Deaf and Hard of Hearing (MCD)
    - MassAbility (MRC)

- [Latoya Odlum]
  - Executive Office of Energy and Environmental Affairs (EOEEA)
  - Executive Office of Education (EOEDU)
  - Massachusetts Department of Transportation (DOT)
  - Executive Office of Health and Human Services (EOHHS) **for the following agencies only:**
    - Dept of Children & Families (DSS)
    - Dept of Youth Services (DYS)
    - Dept of Elder Affairs (ELD)
    - Office of Refugees and Immigrants (ORI)
    - Dept of Transitional Assistance (WEL)
  - Independents
    - Center for Health Information and Analysis (CHIA)
    - Disabled Persons Protection Commission (DAC)
    - Massachusetts Commission Against Discrimination (CAD)
    - Massachusetts Board of Library Commissioners (BLC)

MassPerform General Program Overview

About MassPerform

MassPerform is the Commonwealth's performance management model for managers, centered around meaningful performance conversations.

Please note: While everyone who participates in MassPerform is a manager, we use the words *manager* and *employee* to distinguish supervisory roles. For example, Sarah Unsworth and Jared Garland are both managers who use MassPerform. However, Jared reports to Sarah so in their dynamic, Jared is the *employee* and Sarah is the *manager*. Alternatively, Jared manages Tiffany Hanchett. In that dynamic, Jared is the *manager* and Tiffany is the *employee*.

The goal of this program is to create a performance culture where timely, relevant feedback drives change and delivers meaningful business outcomes through a coaching/check-in model focused on:

- Managers setting clear expectations for their managerial employees.
- Employees creating goals to meet their manager's expectations.
- Managers and employees sharing two-way feedback.
- Employee-driven development.

This occurs through MyPath, the Commonwealth's learning and performance hub, a central resource for performance management tasks and access to learning and training tools (MassAchieve).

Getting started with MassPerform

The first step for new MassPerform-eligible managers is to review an overview of MassPerform and watch the Introduction to MassPerform video.

- Please search the keyword, "Intro to MassPerform," from the MassAchieve Course Catalog.

The next step is to review the MassPerform Program Guide & Toolkit. This provides a detailed overview of the MassPerform program, definitions used throughout, a checklist for managers and employees, and vital information and resources regarding the annual performance review process to ensure a successful performance review.

MassPerform Resources

- Login to MyPath
- View an updated list of current MassPerform Agency Coordinators
- Explore MassPerform's Frequently Asked Questions
- Review MassPerform Trainings, Resources, and Job Aids
    - Most job aids and/or video demonstrations already address your frequently asked questions and are derived from thoughtful questions we receive the most. Unfortunately, we cannot address all questions individually in the handbook. Part of a coordinator's responsibility is to make sure you're reviewing all job aids, video demonstrations, etc., to best assist your agencies.

Fiscal Year Timeline

Fiscal year 2026 timeline

The annual performance review cycle runs from July to June and is primarily broken into two core sections that require two core system tasks in MyPath: Kickoff and Wrap Up.

Kickoff is a time for managers to set expectations for their employee(s) and the employee then sets goals to meet those expectations. This is all done online via MyPath. There is also an initial Kickoff Check-in conversation to discuss what success in the upcoming year looks like for that employee. Kickoff is broken into two groups – on-cycle and off-cycle.

- **On-Cycle Kickoff** begins on July 1st each year. Anyone hired on/before July 1st of that fiscal year is considered on-cycle. On-Cycle Kickoff runs from July to September and due dates vary each year depending on how the calendar falls.
- **Off-Cycle Kickoff** has variable start and due dates. Managers hired *after* Kickoff began (i.e., July 2nd onward) but *on/before* December 31st, are eligible for a performance review. The manager will have 25 days from the time the employee arrives in MyPath to schedule the 1st check-in and set expectations for their new hire. Then, the employee will have 25 days to enter their corresponding goals.
    - **Please note: Anyone hired on/after January 1st is not eligible for an official performance review; however, the manager should still have scheduled check-in conversations, set expectations *outside of the system*, and have the employee brainstorm and discuss their goals. This ensures a smooth onboarding process and aids in employee success and retention.**
- **Ongoing Check-ins:** In addition to Kickoff and Wrap Up, managers are expected to have quarterly Check-ins at a minimum. Check-ins are an opportunity for both managers

and employees to exchange feedback about what is being accomplished and how results are being achieved. At this point, there is **not** a required system entry for the ongoing Check-ins mid-year; however, managers are still expected to conduct regular Check-ins and schedule these via Outlook.

- **Wrap Up** begins end of April or the beginning of May (depending on how the calendar falls) for all on-cycle and off-cycle participants. **Reminder:** Those hired on/after January 1st do not participate in that current fiscal year. Wrap Up begins with the employee reflecting on their goals and their manager's expectations to assess and comment on if they felt they met them. Then, the manager schedules a check-in meeting with the employee to discuss the employee's comments and performance reflections. Next, the manager completes their manager assessment by assessing and commenting on the employee's performance and assigning a final rating. This is all done online via MyPath. Next, the manager schedules a final Wrap Up Check-in meeting with the employee to share their rating. Finally, both the manager and employee electronically sign the performance review.

Phase	Timing	Purpose
Annual Kickoff (On-Cycle) *	July – September	• **July:** The manager sets expectations for their employee and schedules an initial Check-in conversation to discuss what success in the upcoming year looks like for the employee. • **July/August:** The manager conducts an initial Check-in conversation with their employee. • **July – September:** The employee enters their goals to meet their manager's expectations *after* the Check-in.
Annual Kickoff (Off-Cycle) **	July – December	• Within **25 days** of the employee's start date: The manager sets expectations and schedules an initial Check-in conversation to discuss what success in the upcoming year looks like for the employee. • After the Check-in, the employee enters their goals to meet their manager's expectations. The employee has **25 days** to enter their goals after the manager sets their expectations.
Additional Ongoing Check-ins	September – April	• Quarterly (at minimum) to foster the sharing of two-way feedback and the addition/modification of expectations and goals, when necessary. • Additionally, an employee can initiate development-based Check-in meetings with their manager (optional).
Wrap Up	April/May – June	• **May:** The employee reflects on their performance over the past year. • **May/June:** The manager reviews the employee's self-reflection *before* conducting their own assessment and rating of the employee's performance. • The manager conducts a final Check-in to discuss the employee's accomplishments and business impact prior to rating.

*** MassPerform-eligible employees hired on/before July 1st, the start of the fiscal year.**

**** MassPerform-eligible employees hired July 2nd – December 31st.**

Agency Coordinator Responsibilities During Kickoff and Wrap Up

From July – May, it is the coordinator's responsibility to assist HRD's C&C team in conducting manager outreach and monitoring compliance. This is done by using email, organic conversations, or scheduled meetings to address any issues or updates. As for compliance, coordinators should regularly run reports to see which agency(s) and MassPerform users are not compliant. This is especially important between Kickoff and Wrap Up as those with an incomplete Kickoff task cannot participate in Wrap Up. Additionally, those with incomplete Wrap Up steps may become ineligible for potential merit increases that year.

Wrap Up – Calibration and Validation

What is calibration/validation?

- This is the time for agencies and secretariats to make any rating adjustments, when applicable. This occurs between when the manager submits their Manager Assessment & Rating and the end of the fiscal year before ratings are released. *Think of this time as a holding period, per se.*

- Agencies should keep in mind the *recommended rating distributions:*

Rating	Expected Distribution
Exceptional	5-10%
Highly Effective	20-25%
Successful Performer	Up to 70%
Below Expectations	As needed

What is my (Agency Coordinator) role during this step?

- Monitor dashboards and perform targeted outreach to delinquent employees and managers.

- Run the "performance review status distribution" standard report and distribute it to agency leadership using the standard reports job aid. When your ratings are finalized, please inform your Secretariat Coordinator so they are aware that calibration/validation is complete.

- When applicable, reopen steps for managers and employees (upon request). This is part of what the holding period is for (i.e., calibration/validation). You will see a list of "action items" on your homepage for any employees that the manager has submitted their Manager Assessment & Rating.

- **These calibration/validation "action items" do not require any action unless:**

  - You're asked to reopen a step for the manager or employee.

  - Your secretariat's leadership asks you to amend ratings – in this case, you'd reopen the step to the applicable manager for them to amend the rating and/or comments. **Reminder:** You should not be amending the ratings or comments on the manager's behalf as this is the responsibility of the manager.

What's the deadline for rating adjustments?

- The last day for rating adjustments varies each year. **For FY25 Wrap Up it is June 12th.**

When can employees see their FY25 ratings?

- While FY25 ratings will be "released" on **July 1st,** the ratings and comments are *not* visible until the manager digitally signs the form. Managers are expected to meet with their employees to discuss their ratings *prior* to the managers signing because once the manager signs, the employee can see their rating.

What happens after calibration/validation?

- Managers should meet with employee(s) to share ratings & digitally sign form(s)

  - *FY25 ratings are released on July 1, 2025*

  - *FY25 manager signature due date: July 11, 2025*

  - *Managers should meet with their employee(s) between July 1 – 11, 2025, to share the rating* ***before*** *signing the form – this ensures the employee is aware of their rating before seeing it electronically*

- Employees should digitally sign the form

  - *FY25 employee signature due date: July 18, 2025*

- Coordinators are required to (bulk) print signed forms and place them in the personnel file

  - **Reminder:** MyPath is not the system of record for performance reviews.

How do I sort the performance reviews by name, rating, etc.?

- From the MyPath welcome page, click the **Show Navigation Menu** button in the top right corner (hamburger menu). Click the **Performance** button and then click the **Performance Reviews** button from the expanded menu. You will be brought to the Performance Review Summary page. You can sort by title (name), description, status, start date, etc.

Communications

Utilizing Dashboard Reports and Standard Reports

These two job aids will assist you in running these reports:

- MyPath Job Aid – Standard Reports for Managers and Coordinators
    - Use a standard report to view goal progress, goal targets, performance reviews, performance review ratings, bulk performance reviews, and more.
- MyPath Job Aid – Dashboard Reports for Coordinators
    - Use a dashboard report to view real-time compliance data. You can view the details of the data and/or export it to Excel. **Reminder:** The dashboards do automatically refresh; however, it's always best to verify the last refreshed date in the bottom left corner of each dashboard and manually refresh when necessary.

Compliance Monitoring – Diversity Expectation

All managers are required to have at least one diversity expectation. As a coordinator, we ask that you periodically run a report to ensure all your managers have a diversity expectation for their employees. To monitor this, run a **Goal Progress Report** using an advanced filter or filtering within the Excel file. Specific steps on how to run this report can be found here: MyPath Job Aid – Standard Reports for Managers and Coordinators.

Note: The report lists all *drafted* and *submitted* expectations. If your report is blank, this means none of your managers have drafted or submitted any expectations.

Automated System Compliance – MyPath vs. Me

MyPath notifies all users when they have a new action item to complete. Additionally, MyPath notifies incomplete users with the following: deadline approaching, deadline today, and a series of past-due emails. Once the action item is fully complete, these emails will cease.

The coordinator should monitor this in their past-due dashboard reports and keep the lines of communication open with their managers to ensure timely compliance. Coordinators are welcome to send additional reminder emails leading up to the due date, but it is not necessary as MyPath takes care of this. Instead of more emails, we encourage using organic conversations and meetings to put in additional plugs for MassPerform.

Communication Assistance from the C&C Team

C&C frequently reaches out to coordinators with instructions or updates on what to pass along to your managers. We will always provide an attached email template to assist with your outreach efforts. *Rest assured, if there is something time-sensitive that we'd like you to communicate with your managers, we will notify you and provide ample details.*

HR/CMS and MyPath Integration

Relationship Between HR/CMS and MyPath

The Human Resources Compensation Management System (HR/CMS) maintains all employee records. HR/CMS speaks to MyPath to provide details about the employee (e.g., secretariat, agency, supervisor, direct reports, employment status, hire date, and more).

Please note: Changes made in HR/CMS can take <u>up to four (4) days</u> to reflect in MyPath.

ACES (Performance) Eligible Flag – Functionality and Purpose

ACES is the previous performance review system, now known as MassPerform. As such, there is an ACES Eligible checkbox within HR/CMS' position data. If selected, it indicates that the employee is a manager (non-union) and is **MassPerform eligible.**

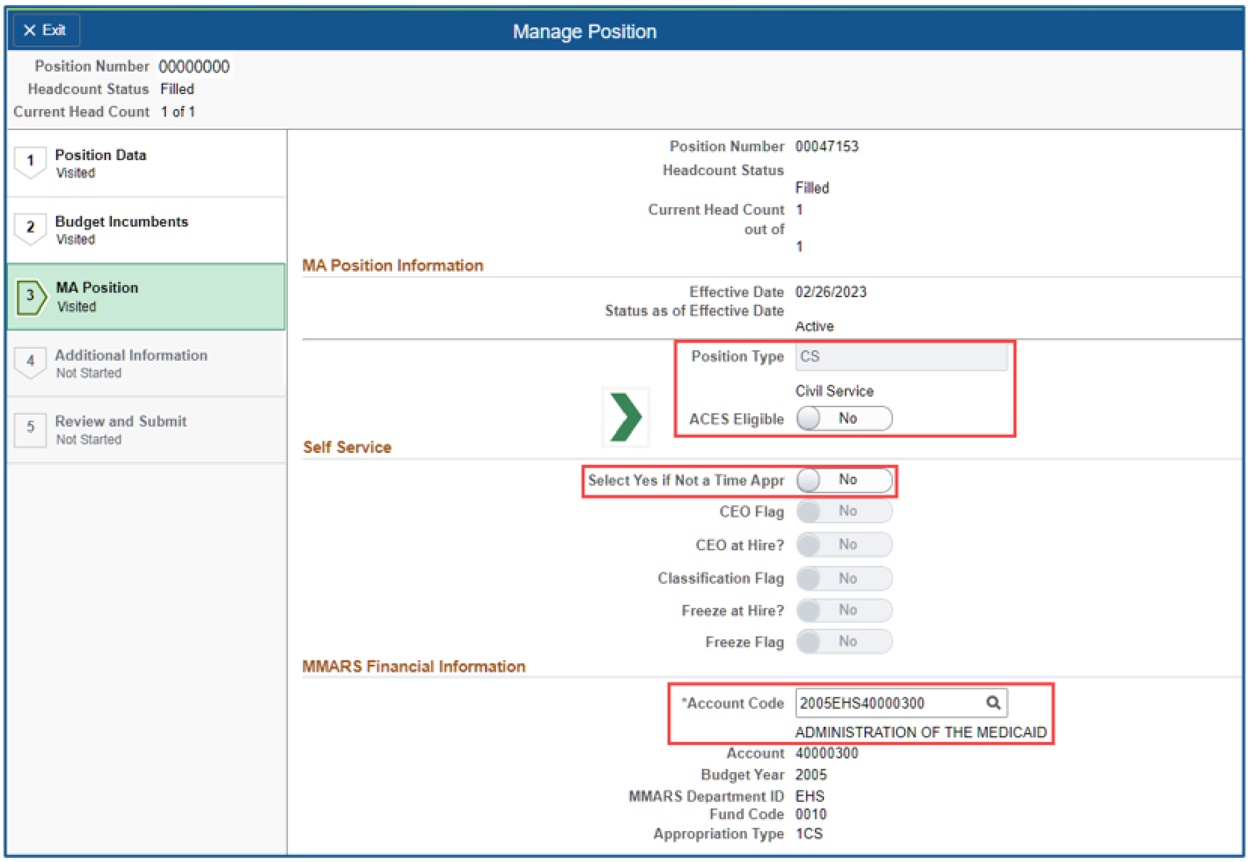
This checkbox must reflect accurate, up-to-date information as HR/CMS communicates regularly with MyPath. *It is important to remember that changes made in HR/CMS can take **up to four (4) days** to reflect in MyPath.*

- If the box is accidentally unchecked, the MyPath system will **not** create a performance review task for that employee.

- If the box is accidentally checked, MyPath believes that person is an employee eligible for a performance review and may trigger associated tasks, system comms, etc.

- **Please note:** If a supervisory employee (i.e., manager) is *not* ACES (performance) eligible, but they have a direct report(s) who *are* eligible, that supervisory employee does **not** need the flag turned on. *The system will automatically provide the appropriate access.*

Please refer to this job aid to familiarize yourself with how to update a position in HR/CMS. Information on how to update the ACES (performance) Eligible flag can be found on page 5.

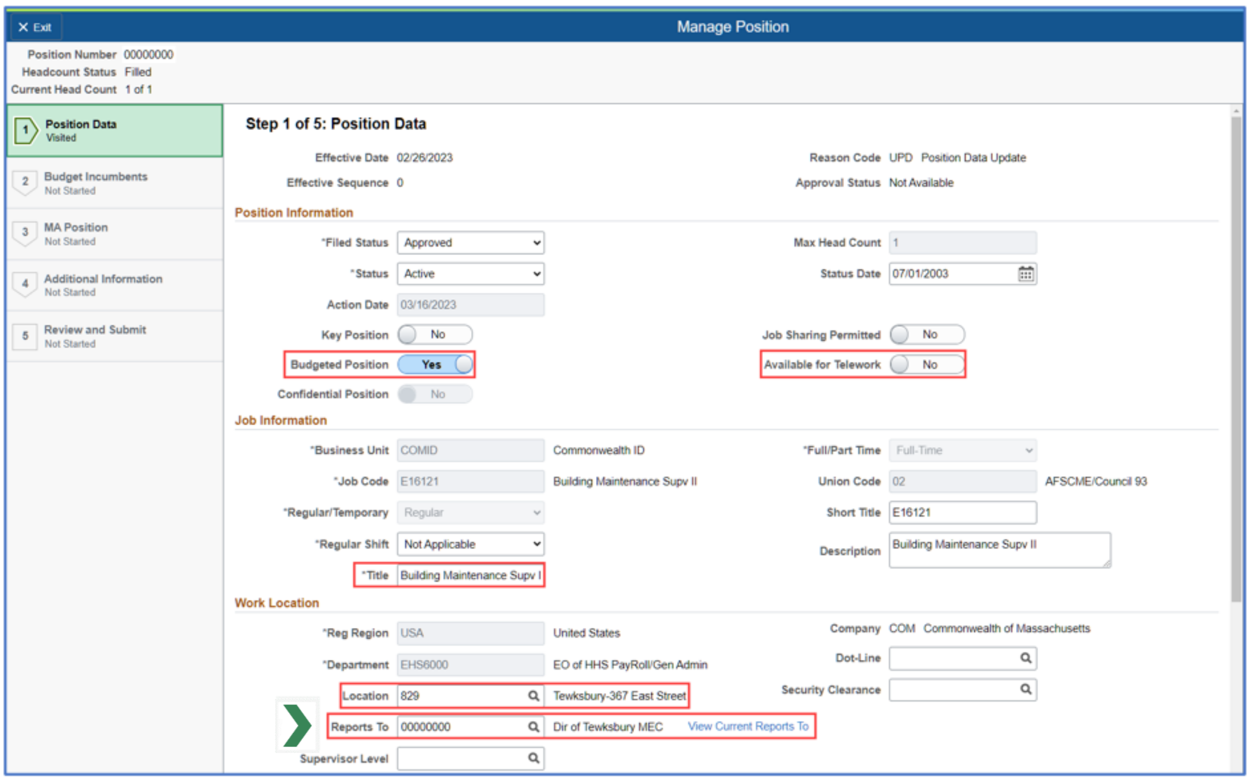


HR/CMS "Reports To" Field – Functionality and Purpose

The "reports to" function in HR/CMS is equally important as this dictates the hierarchical management structure. If John reports to Joe, Joe must be accurately listed in the "reports to" field for John's position data. The "reports to" field is a driver of time reporting and time approval so please be mindful of this when making any updates.

Important Note: If a manager leaves the department (e.g., transfer, termination, etc.), the employee's "reports to" field should not be left blank; it **must** be updated. If the report to field is blank, the employee's performance review form will not advance correctly. If the deadline has not passed, the form will be stuck. If the deadline has passed, the form will skip the manager step and have a step status of "complete." To review if you have any vacant managers, please see the [Missing Data for MassPerform report](#).

Information on updating the "reports to" field can be found on page 3 of this [job aid.](#)



Circular Reference Error

A circular reference occurs in MyPath when the "reports to" field creates a circle within HR/CMS. For example, if Tiffany reports to Jared, and Jared reports up to Sarah, Sarah cannot report to Tiffany. Two people may also not report to each other (i.e., Tiffany to Jared and Jared to Tiffany). Coordinators should ensure there are **no** circular references as this will lead to errors in MyPath.

Additionally, an employee should never report to themselves.

Managers Who Left the Department

When an employee's manager leaves the department (e.g., transfer, termination, etc.), the "reports to" field **must** be updated. If the manager field is left blank, the employee's performance form has no one to advance to and will automatically go to a "closed" status which causes performance review issues.

Employees with No Business Email Address

All MassPerform users must have a business email address associated with them in HR/CMS. If not, they cannot receive MyPath system communications and will be unable to reset their password without assistance from the ESC.

Helpful Tips for Periodic Auditing of Missing Data

There is a **Missing Data** dashboard report that includes three reports:

1. Employees with missing supervisor or manager information.
2. Employees with missing business emails.
3. Employees with missing ACES (performance flags).

We encourage you to periodically run dashboard reports for the aforementioned items. It's important to ensure all MassPerform-eligible managers have their ACES Eligible flags turned on so that they may receive a performance review. If someone does not have their flag turned on that should, they will not have a performance review task turned on for them in MassPerform. Alternatively, if someone has their flag turned on that is *ineligible*, they will have a MassPerform form and will receive system notifications when they shouldn't.

Additionally, it is equally important to run a report of who your MassPerform-eligible employees are reporting to. This will allow you to get ahead of any issues such as blank fields, inactive "reports to" position numbers, people reporting to themselves, so on and so forth.

Finally, business emails are crucial to ensure they can receive MyPath system communications. This is also important if/when someone needs their password reset and requires ESC assistance.

Frequently Asked Questions

Top 5 Frequently Asked Questions

1. **Why do I see the word "roadblock?" What does this mean during Wrap Up?**

   During Wrap Up, employees may see the status "roadblock" when they carry over their expectations/goals from Kickoff but have yet to update their goal completion. This status means the goal(s) completion is less than 50%. For this reason, it's very important that employees take the time during the Wrap Up task – Employee Performance Reflection – to update their expectation/goal progress.

   Familiarize yourself with this job aid and disseminate it to your managers when you receive this question. Additionally, video demonstrations and helpful resources can be found on our training, resources, and job aids website here.

2. **A) What happens if a manager has employees hired on/after January 1st?**

   Anyone hired on/after January 1st is **not** eligible for an official performance review for that current fiscal year; however, the manager should still have scheduled check-in conversations, set expectations, and have the employee brainstorm goals if they have any direct reports. This ensures a smooth onboarding and aids in employee success and retention. **Please note:** This should all be done *outside* of the system.

   B) What happens if a manager has employees hired on/before December 31st (i.e., Off-cycle) BUT the manager themselves was not hired until *after* Kickoff concluded?

   The manager is still responsible for conducting Wrap Up for that employee when Wrap Up begins in late April/early May. Expectations and goals have already been set by the previous manager, so they technically don't have something required of them to do regarding Kickoff as it was already concluded; however, it's best practice for the manager to meet with the employee(s) and update the expectations/goals as necessary.

3. **A) Are BU employees who are in an M99 acting position MassPerform-eligible?**

   Typically, Acting Appointments should be six months or less. As such, they usually are not MassPerform-eligible, but we review these requests on a case-by-case basis.

   B) Are post-retirees MassPerform-eligible?

   No, PR employees are not eligible.

4. **How do I update my goals during Wrap Up when the section is grayed out?**

   If the **Select Expectation & Goals** button is grayed out during Wrap Up when the employee is trying to complete their Employee Performance Reflection, this means there are incomplete Kickoff steps. Please ensure all Kickoff action items are complete between the employee and the manager and follow up with the necessary person. Remember, Kickoff begins with the manager. If the manager never set expectations in the first place, the employee never had the opportunity to enter their goals. In this case, you'd follow up with the manager first. If the manager *did* set expectations, this means the employee never entered their corresponding goals. In this case, you'd follow up with the employee.

5. **A) When should a co-planner be added?**

   Co-planners are meant to be used only if a manager is on leave (e.g., vacation, sick, etc.) and cannot complete the action item before the due date. *When an employee transfers to a new department shortly before Wrap Up begins, the **new** manager should ideally put the **old** manager on as a co-planner so that the old manager may complete the Manager Assessment & Rating step.*

   Reminder: If you are signing a form during Wrap Up on behalf of another manager, be sure to sign using your **own name**, as opposed to the manager for which you are a co-planner.

   B) If a manager is away on vacation or leave, what should we do to ensure their absence does not delay task completion?

   If a manager is going away on vacation or will be on leave, they should do their best to complete their responsibilities *before* leaving or upon their return as most action items give managers multiple weeks to complete. If they will be gone for the duration and truly cannot complete their tasks, it's best practice for them to add a co-planner before leaving as to not delay any form advancement or miss any deadlines. Depending on when the manager goes on leave or vacation, please contact the ESC should you need assistance adding a co-planner for that manager.

   C) If a co-planner is added during FYXX Kickoff, can the co-planner copy (advance) the previous year's expectations to the current cycle on the manager's behalf?

   No, only the manager can advance past expectations to a new performance review cycle. If a manager is out on leave, the Agency Coordinator may ask for their C&C Analyst to do this on the manager's behalf. If the manager is here though, it is their responsibility to transfer expectations. Please share the job aid linked above with them and/or jump on a call with them to assist. **Your C&C Analyst should only be used as a**

<u>last resort.</u>

D) What happens to the action item when a co-planner is added?

The action item will remain with the manager and will *also* display in the co-planner's action items. When someone is added on as a co-planner, the original manager, the co-planner, and the employee (manager's direct report), all receive an automated email notification.

E) If a co-planner is added during Wrap Up's Manager Assessment & Rating step, does that remain in effect for the Manager Signature step as well?

Yes, Wrap Up is the task as a whole and there are steps/parts within. When a co-planner is added to one part of Wrap Up, it carries over into all parts (i.e., the co-planner stays). Co-planners will remain on all the steps/parts within a task but do not carry over between tasks (i.e., Wrap Up to Kickoff and vice versa).

F) Will the co-planner remain on a reopened step?

If a co-planner is added, the co-planner will remain until removed. When reopening a step, both the co-planner and manager will stay on the action item.

G) Can a co-planner add another co-planner?

No, a co-planner cannot add another co-planner. The manager can add *multiple* co-planners but an added co-planner cannot then add a co-planner as the task is originally owned by the manager.

Kickoff

1. **What do I do if an employee takes matters into their own hands to set expectations for themselves before their manager does?**

   Refer the employee to the MassPerform Program Guide & Toolkit to review the roles and responsibilities of both the manager and employee in the program. Remind the manager to let their employee know of their expectations for them and confirm that the manager documented them correctly in the system.

2. **Why do two expectations that both display 0% completion appear in two different colors (blue and orange) and have two different statuses (i.e., "In Progress" and "On Track")?**

   This usually appears during Kickoff when some expectations have been carried over (advanced) by the manager from a previous fiscal year. This usually displays as orange 0% and a status of "in progress" because it was technically started the previous year. When a newly established expectation is entered, this usually displays a blue 0% and a status of "on track."

   Rest assured, once an employee adds new goals within the current fiscal year's expectations (regardless of whether it's a new or advanced expectation), the percentages will all turn orange, and the status will change to "in progress" as opposed to "on track."

3. **How can I check to see which managers have set the required diversity expectation for their direct reports?**

   Please visit here.

4. **What do I do if a manager tells me they'd like to modify their expectations, but they've already submitted the Manager Schedule 1st Check-in and Set Expectations form?**

   There are two possible ways to assist, depending on where the form is. Your first step as coordinator is to find out if that manager's employee completed their **Employee Enter Goals** action item. You can view the employee's action items without proxying via this job aid.

   Option 1: *If the action item is still there, the employee did not submit it yet.* In this case, reach out to your C&C Analyst who will work with our IT team to manually return the form to the manager.

Option 2: If the employee **did** complete the employee enter goals action item (i.e., you do not see the action item appear using the job aid instructions linked above), please encourage your manager to review these resources:

- **Enter New Expectation: Video Demonstration | Job Aid**
- **Update or Cancel Existing Expectation: Video Demonstration | Job Aid**

5. **Is it possible for a manager to assign (cascade down) expectations to their direct and indirect reports during Kickoff?**

During Kickoff, managers will not even see the option to assign an expectation to more than one employee as each employee has an individual form. We ask that managers follow the Kickoff steps as intended. However, if a manager would like to assign an expectation to multiple employees, a manager can assign expectations to *their* direct reports, but should **never** use the "Direct & Indirect Reports" checkbox on the Create Expectations & Goals screen. This is noted in more detail in step 6 of this job aid.

If a manager assigns expectations to indirect reports, this will go multiple layers down and disseminate to both EPRS and MassPerform subordinates which is problematic. If a manager wishes to cascade expectations further down than just their direct reports, they should communicate this with their direct reports for **manual** entry in MyPath, and then those managers will cascade down to their directs, and so on.

Example: Sarah Unsworth has expectations for her direct report, Jared Garland. She also would like those expectations to go to Jared's subordinates (Sarah's indirect reports). Rather than Sarah assigning those expectations in the system to her indirect reports, she will communicate this to her direct report (Jared) who will then manually add those expectations for his direct reports.

6. **If an employee enters goals after completing their Kickoff task, will the system show the newly entered goals in the Kickoff printout?**

The Kickoff printout captures a moment in time. So, it will only show what has been entered at the time of completion. If goals are added after Kickoff, they will not appear on the printout.

Mid-Year

1. **How do I update my goal progress throughout the year?**

   Please refer to this job aid for detailed instructions.

2. **If an employee changes managers mid-year, will the previous comments, goals, and expectations carry over so that the new manager can see them?**

   Yes, everything should automatically carry over if the employee’s role changes from one management position to another management position.

3. **A manager is reporting that their expectations and goals have disappeared. What happened and what do I do?**

   Check the expectations’ start and end dates. They can only be added to the task if the dates fall within the performance review period. Additionally, check the expectations’ “status.” Expectations saved by the employee in a “draft” status *cannot* be added to a Kickoff or Wrap-up task; they need to be “submitted.”

Wrap Up

1. **Can a manager complete Wrap Up sooner for their employee who is going on leave in the summer and/or if the employee will be gone during Wrap Up?**

   No, managers and employees cannot begin a task before the task is open in MassPerform. If this situation arises, the manager should complete their part as usual, and the employee can sign their performance review upon their return.

2. **What do I do if an employee won't sign their performance review during Wrap Up?**

   They are a manager, and, as such, should sign the review form. They can add comments to the comments box before signing but they **should sign.** Review this job aid for more details about how to electronically sign the performance review form.

   Please note: An employee signing the form does **not** equal *agreement* with the rating. Rather, signing the form is an *acknowledgment* of the rating. Employees may use the comment box to document additional feedback.

3. **What happens during compensation?**

   Any merit pay program will have specific eligibility terms and requirements. This will be announced via a memo from the Chief Human Resources Officer, when applicable.

4. **A) If an employee is out on an approved leave, should they be evaluated and receive a MassPerform rating?**

   Employees on an approved leave for 6 or more months during the performance cycle do not need to be evaluated or assigned a rating in MassPerform. If this is the case, please contact your C&C analyst to have the Wrap up performance review form manually deleted from the system. Please download a copy of the review for your record prior to removal. Additionally, please note the employee's name in the event of an across-the-board (ATB) increase.

   B) If any employee is out of the office for the majority (> 6 months) of the cycle on an approved leave and can't be evaluated, what should I do?

   If an employee has been on an approved leave for *less* than 6 months during the performance cycle, they must be evaluated and assigned a rating in MassPerform.

5. **A) What do I do if someone wants to appeal their performance review?**

Managers who receive a performance review rating of *Below Expectations* have the right to appeal their rating to HRD. A manager must file the appeal in writing within five (5) business days after receiving notification from their agency. You may direct the employee to send their written appeal to HRD's C&C team via email. They should also carbon copy (CC) you as the coordinator and the Director of Human Resources. The appeal will be adjudicated by HRD.

They must still sign their Wrap Up form, even if they are seeking to appeal the rating. They can enter comments in the form upon signing if they wish. Signing a Performance review does *not* an agreement with the rating, but rather an acknowledgement of the rating received.

B) Can a manager appeal any performance rating?

No, a manager may only appeal a "below expectations" rating.

C) What is the management employee appealing?

The goal of a MassPerform appeal is to assess whether or not the process was followed. For instance, was the Kickoff meeting held? Were there check-ins? Was the Wrap Up meeting held? Etc. It is not for HRD to review work performance, but rather to review whether or not the process itself was followed.

D) Who is present at the appeal hearing?

The appellant, the appellant's manager, an agency and/or HR representative (optional), and three (3) members of HRD's Classification and Compensation unit who will act as the hearing officers.

E) When can an employee request an appeal?

An employee may request a hearing within five (5) business days of receiving a "below expectations" rating.

They must still sign their Wrap Up form, even if they are seeking to appeal the rating. They can enter comments in the form upon signing if they wish. Signing a Performance review does *not* an agreement with the rating, but rather an acknowledgement of the rating received.

F) How long will the hearing last?

One (1) hour and fifteen (15) minutes. The appellant will have twenty (20) minutes to speak. Then the manager (and the optional agency/HR representative(s)) will have (20) minutes to speak. Finally, both parties will have ten (10) minutes each for rebuttals. HRD will ask clarifying questions during the hearing.

G) Can participants submit supporting documents prior to the hearing?

Yes. Submitted documents will be shared with all hearing attendees, so to allow participants ample time to review and prepare for the session. All documents must be submitted at least two (2) business days prior to the hearing.

H) Will the rating be changed in the system if the MassPerform review rating is overturned?

No, the rating won't be changed in the system, as MyPath is not the system of record. Rather, the appeal decision letter will be placed in the employees personnel file by HR.

I) Will the employee receive merit pay if the decision is overturned?

Yes, but only if there is a merit pay incentive for the applicable review period**.**

6. **What is the reason(s) in which a manager may be unable to see an employee's Wrap Up form?**

   There is most likely an issue in HR/CMS such as a "reports to" error or something of that nature. However, this is not always the case. The first step to troubleshooting this is to view the user record field in MyPath. As a Coordinator, you have access to this. Please review this job aid to troubleshoot on your end *before* contacting your C&C Analyst.

7. **Why is a manager missing some of their employees for the Manager Assessment & Rating step during Wrap Up?**

   Wrap Up begins with the employee (Performance Reflection step) and employees may complete their action item at different times. As such, the manager will only see those employees who have completed their Employee Performance Reflection step.

   With the new centralized task (combining all employees into one action item for the supervisor), this means that the manager will only see those who have completed it. For example, if a manager has 10 employees and only 3 have completed their part so far, they will only see those 3 people as the other 7 are still finishing what they need to do and the manager cannot yet assign a rating.

The other scenario in which an employee may be missing is if they were hired *after* January 1 and thus ineligible for that fiscal year's performance review cycle.

8. During Wrap Up, if the manager brings in expectations that the employee forgot, does the form need to go back to the employee again?

This is up to the manager. The manager should discuss this with the employee during the Wrap Up Check-in meeting and proceed as agreed upon. There are two options:

- The manager could add comments on the employee's behalf based upon their conversation or;
- The manager can return the form to the employee for them to reflect on the additional expectation(s) brought in.

General

1. **How can the Secretariat Coordinator best support the Agency Coordinators and the MassPerform program?**

   Secretariat Coordinators should promote the program to employees via available communications streams, including regularly scheduled meetings with staff. They should also monitor dashboard reports to support adoption and compliance.

2. **What do I do when an employee transfers from another Executive Branch agency?**

   If the transfer occurs during/shortly after Kickoff, the new manager can cancel out any prior expectations that are no longer relevant, and add new expectations to capture the new manager's expectations.

   If the transfer occurs shortly before/during Wrap Up, the **new** manager should add the old manager as a co-planner (see question #5 in the top 5 FAQ). This allows for the old manager to provide a rating based on their expectations that their former employee worked on the majority of the fiscal year.

   Note: The new manager might not receive system emails depending on the timing of the transfer (i.e., already exhausted all past-due emails). The following resources will assist new managers in updating existing expectations and/or entering new ones:

   a. Enter New Expectation: Video Demonstration | Job Aid - Enter New Expectation
   b. Update Existing Expectation: Video Demonstration | Job Aid - Update Expectation

3. **Why do I see EPRS information when I log in to MyPath for MassPerform?**

   On July 1, 2024, EPRS joined MyPath. As such, all MassPerform users will see both performance program logos. Depending on a manager's role(s), they may have action items for both performance programs.

4. **Why do I still see the action item on my homepage even though I reopened the step?**

   When anyone reopens a step, whether it be manager to employee or coordinator to manager or employee, the action item will appear in two places (i.e., the person who reopened the step **and** the person who the step was reopened for).

5. **Someone is telling me they do not see their action item(s). How do I check on the validity of this?**

As a Coordinator, you can view action items for a user without proxying in as them. Please review this job aid to see how!

Reminder: If the deadline has passed and the manager did not complete their action item for *every* subordinate, the action item may disappear from the My Performance Action Items widget on the homepage. The manager should click the **Performance Reviews** link (box above the action items widget) to access the form link.

6. **What happens if a manager switches from a management position to a BU position?**

   If a form needs to be removed, please download a copy first. Then, the MassPerform Coordinator should email their C&C Analyst to request the MassPerform form(s) be deleted.

   Please note, depending on the time of transfer, an EPRS form may or may not be manually generated as well.

7. **What happens to an employee's forms when leaving state service or moving into a post-retirement (PR) position?**

   Any forms related to a person who is no longer active in MassPerform will be removed automatically within a few days of the changes being made in HR/CMS.

8. **Why does a post-retiree have a form in MassPerform?**

   Post-retirees who only wear an employee hat (reviewee) should **not** have a form generated. If they do, please work with your local HR shop to have their ACES-eligible flag turned off. The only post-retirees who **need** to be in MassPerform are those who are managers (reviewers) as this means they need to be able to create expectations and assign ratings for their direct reports. If a post-retiree does **not** have any direct reports (reviewee only), they should not be in MassPerform.

9. **Why are there error messages occurring on the side of the screen saying, "Unable to complete this action, please try again?"**

   If this occurs, please try clearing your cache (cached images and files) by using the Ctrl+Shift+Delete buttons or it can be found in your internet browser's settings (top right) under "Clear Browsing Data." It is best practice to clear browsing history, download history, cookies and other site data, and cached images and files. Once you've done this, please log out of MyPath and log back in. If the issue persists, please file a ticket with the ESC.

10. I have a form with a blank manager signature field, can we have this corrected?

I have a form with a blank check-in date and cadence, can we have this corrected?

If this happens, this means that the reports to relationship for this employee was vacant and the step became past-due. To correct for this, first ensure that the reports to field in HR/CMS has been updated for the employee. Then, reach out to your HRD C&C Analyst to request to have the manager step re-opened for completion.

Employees should never report to a vacant position number. Accurate data is essential for these relationships, which drive the flow of MassPerform in MyPath.

11. The submit button is grayed out, how can I fix this?

The submit button only grays out if either something mandatory has not been completed or if each page has not been fully reviewed. Please ensure each action is completed and each page has been fully reviewed in order to successfully submit the action item.