

Coordinators Only

Add, Advance, or Update Expectations

This job aid will guide Agency and Secretariat Coordinators through the process of adding, advancing/transferring, or updating/canceling expectations throughout the year for members of their agency(s) or secretariat. Typically, this is done by the manager or their designated co-planner; however, in certain situations, the coordinator may be requested to assist with these actions.

**Please note:** Some job aids for these actions already exist. However, as a coordinator, the steps within slightly vary. As such, some job aids are linked with additional instructions provided. Additionally, this job aid is intended to apply to MassPerform only. Employee Performance Review System (EPRS) job duties should be submitted by the employee’s direct supervisor. If a coordinator attempts to add a job duty for an EPRS employee, the job duty will require the approval/denial from the supervisor in the MyPath system.

**STEP 1.** Sign in to your **MyPath** account at **mass.csod.com** (Login is your employee ID).

*An overview of each action and the steps to navigate are available below.*

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# Coordinator Actions on Behalf of Your Agency(s) or Secretariat

## How to Add New Expectations

- STEP 1.** Follow steps 1 – 4 of the [enter new expectations job aid](#). After completing step 4 of that job aid, pause and return here to proceed with the steps outlined below.
- STEP 2.** After drafting the new expectation, scroll to the bottom of the page and locate the **Assignment** section. Click the radio button **Custom Assignment**.

The **Yourself** radio button will automatically be checked, so it's imperative you change this to **Custom Assignment** to not assign yourself the expectation.

### Assignment \*

Select which users or OUs this duty should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

To advance the expectation(s) to an employee within your agency or secretariat, you must change the assignment to Custom Assignment and search for the applicable employee.

### Assignment \*

Select which users or OUs this duty should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Select OU Criteria ▼

✓ Select OU Criteria  
Users

- STEP 3.** Click the drop-down list **Select OU Criteria**. Select the **Users** options from the expanded list.

### Assignment \*

Select which users or OUs this duty should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Select OU Criteria ▼

✓ Select OU Criteria  
Users

- STEP 4.** A search box will appear to the right of **Users**. Search for the desired employee and select their name once it appears. They will then display in the table below. **Do not check the “include subordinates” box.**

Users ▼  

Criteria	Include Subordinates
✕ Garland, Jared (██████)	<input type="checkbox"/>

**Note:** If you wish to create this new expectation for **multiple people** simultaneously, repeat step 4 above for all desired employees.

#### Assignment \*

Select which users or OUs this goal should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Users

Criteria	Include Subordinates
✕ Garland, Jared (██████)	<input type="checkbox"/>
✕ Unsworth, Sarah (██████)	<input type="checkbox"/>
✕ Hanchett, Tiffany (██████)	<input type="checkbox"/>

#### Options

☒ Create a separate goal for each user.

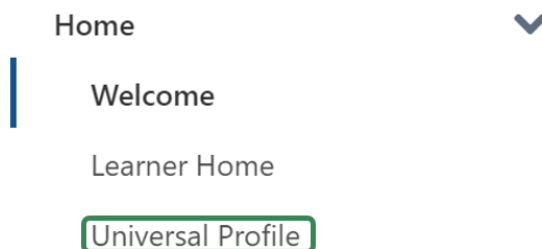
**STEP 5.** When done, click **Submit** to apply it to the employee's current Kickoff task. Repeat as necessary for any additional expectations.

## How to Update or Cancel Existing Expectations

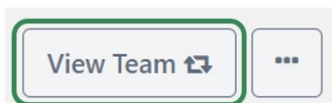
**STEP 1.** From the MyPath homepage, click the **Show Navigation Menu** button in the top right corner.



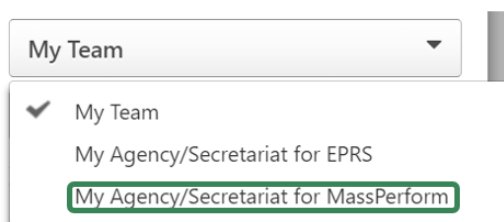
**STEP 2.** Choose **Universal Profile** under **Home** in the list of expanded options.



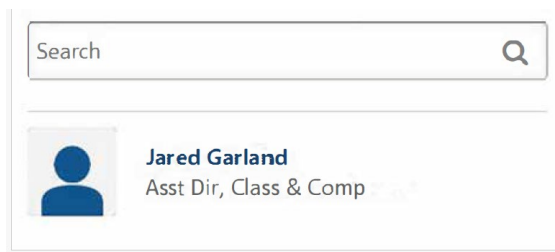
**STEP 3.** Click the **View Team** button on the right side of the screen.



**STEP 4.** Click the **My Team** drop-down button to expand the options. Select **My Agency/Secretariat for MassPerform** from the expanded list.

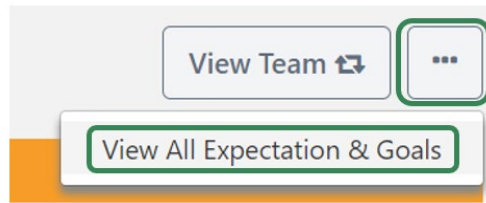


**STEP 5.** A search engine box will appear with a list of all the employees in your designated agency(s) or secretariat. Use the search engine box or the list to navigate to your desired employee.



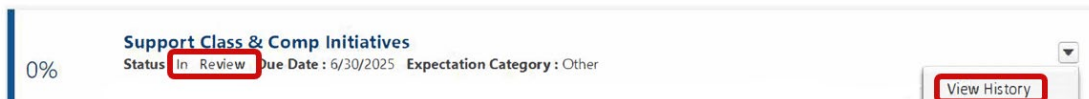
**Note:** If you use the list option instead of the search engine box, scroll down to the bottom to toggle between the pages.

**STEP 6.** Once you've selected your desired employee, select ... **Options** button to the right of **View Team**.  
Select the expanded **View All Expectation & Goals** dropdown button.



**STEP 7.** Follow steps 5 and 6 of the [update or cancel existing expectations job aid](#).

**Reminder:** A status of **In Review** will *not* let you update/cancel expectations for the current period. This is because the employee has *not* entered their corresponding goals yet so the Kickoff task incomplete.

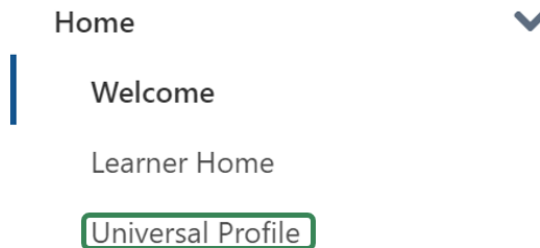


## How to Transfer/Advance Past Expectations to a New Performance Review Cycle

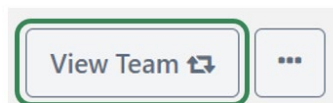
**STEP 1.** From the MyPath homepage, click the **Show Navigation Menu** button in the top right corner.



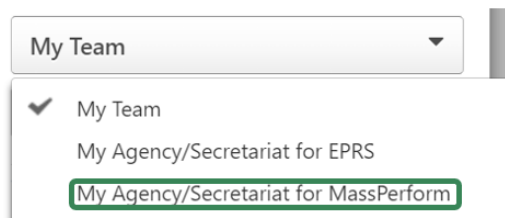
**STEP 2.** Choose **Universal Profile** under **Home** in the list of expanded options.



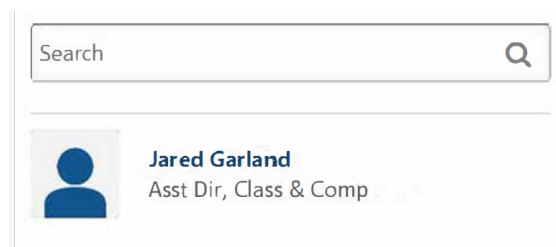
**STEP 3.** Click the **View Team** button on the right side of the screen.



**STEP 4.** Click the **My Team** drop-down button to expand the options. Select **My Agency/Secretariat for MassPerform** from the expanded list.

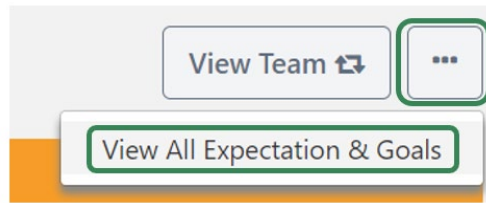


**STEP 5.** A search engine box will appear with a list of all the employees in your designated agency(s) or secretariat. Use the search engine box or the list to navigate to your desired employee.

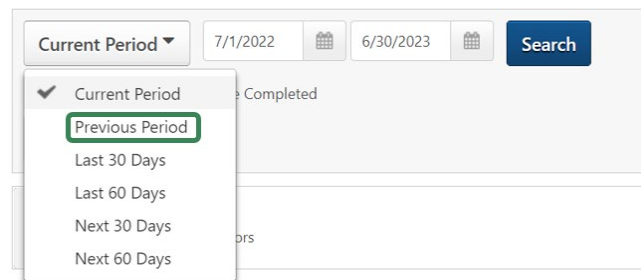


**Note:** If you use the list option instead of the search engine box, scroll down to the bottom to toggle between the pages.

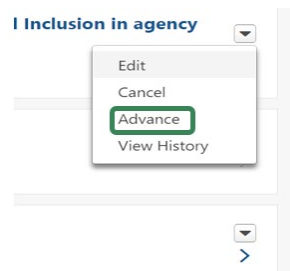
**STEP 6.** Once you've selected your desired employee, select ... **Options** button to the right of **View Team**. Select the expanded **View All Expectation & Goals** dropdown button.



**STEP 7.** Click the **Current Period** button and select **Previous Period** from the drop-down menu.

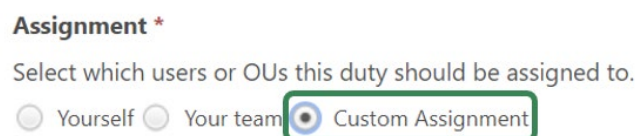


**STEP 8.** Next, click the **Goal Options** down arrow button on the right side of each previous expectation you wish to transfer. Select the **Advance** button from the drop-down list for any expectation you'd like to carry over into the current review period.



**STEP 9.** Make any necessary updates to the dates, comments, goals within the expectation, etc., as needed.

The **Yourself** radio button will automatically be checked, so it's imperative you change this to **Custom Assignment** to not assign yourself the expectation.



To advance the expectation(s) to an employee within your agency or secretariat, you must change the assignment to Custom Assignment and search for the applicable employee.

#### Assignment \*

Select which users or OUs this duty should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Select OU Criteria ▼

✓ Select OU Criteria  
Users

**STEP 10.** Click the drop-down list **Select OU Criteria**. Select the **Users** options from the expanded list.

#### Assignment \*

Select which users or OUs this duty should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Select OU Criteria ▼

✓ Select OU Criteria  
Users

**STEP 11.** A search box will appear to the right of **Users**. Search for the desired employee and select their name once it appears. They will then display in the table below. **Do not check the “include subordinates” box.**

Users ▼

Criteria	Include Subordinates
✕ Garland, Jared (██████)	<input type="checkbox"/>

**Note:** You can only advance/transfer one expectation at a time; however, you can send one expectation to **multiple people** simultaneously. Repeat step 11 for all desired employees.

#### Assignment \*

Select which users or OUs this goal should be assigned to.

☐ Yourself ☐ Your team ☒ Custom Assignment

Users ▼

Criteria	Include Subordinates
✕ Garland, Jared (██████)	<input type="checkbox"/>
✕ Unsworth, Sarah (██████)	<input type="checkbox"/>
✕ Hanchett, Tiffany (██████)	<input type="checkbox"/>

#### Options

☒ Create a separate goal for each user.

Cancel Save as Draft Submit

**STEP 12.** When satisfied with the changes (if any), click **Submit** to advance it to the employee’s current Kickoff task. Repeat as necessary for each former expectation you wish to advance.

Cancel Save as Draft Submit