MyPath》》

Dashboard Reports for Coordinators

The following steps guide you through the process of running dashboard performance reports in MyPath for both MassPerform and EPRS, depending on your coordinator role.

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

STEP 2. From the homepage, expand the **Show Navigation Menu** options button from the top-right corner. Click the **Reports** button from the drop-down menu list and then click the **Dashboards** button**.**

STEP 3. From the **Dashboards** screen, hover over the top-right corner of each report to reveal a drop-down arrow. This allows you to view the details of the report, export data to an Excel file, or refresh the graph for the most up-to-date information.

An overview of each report type and the steps to run are available below.

FY EPRS Stage A, Stage B, Stage C, & FY MassPerform Kickoff/Wrap Up Dashboards

Reports: EPRS Stage A, Stage B, Stage C Completion & Summary Kickoff/Wrap Up Performance Review Task Status

Select this report to view the agency or secretariat's progress within the respective task. The report includes performance review tasks for all active users. The pie chart is broken up into percentages based on task status:

- **Not Started** – The performance review has not been started by the initial step owner (e.g., supervisor for EPRS, manager for Kickoff, and employee for Wrap Up). If the review is not started and a review step becomes past due, the individual review task status is changed to "In Progress."

- **In Progress** – At least one performance review step has started. This status *also* occurs when the review is not started, and a review step becomes past due.

- **Incomplete** – All required performance review steps are not complete after the end date of the individual review. For EPRS, the last step owner has not completed their past-due task (i.e., reviewer for Stage A/B and employee for Stage C).

- **Completed** – All required performance review steps are complete for the review.

*For compliance outreach efforts, anyone not in a "completed" status has **not** done what they need to do. Please focus your communication efforts on these users.*

To see additional performance review task status data, hover over the top-right corner of the report to reveal a drop-down arrow. This allows you to view the details of the report, export data to an Excel file, or refresh the graph for the most up-to-date information. The drop-down arrow provides three navigation options:

- **View Details –** This brings additional details regarding the agency, secretariat, department ID, supervisor information, performance review start dates, email, and more.

- **Export in Excel –** Export the detailed information into an editable, shareable data file.

- **Refresh** – This refreshes the chart with the most up-to-date data.
  - *Please note: Reports should automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section. Always check the last refreshed date as sometimes it does not automatically refresh.*

Reports: Performance Review Status by Step Title

Select these reports within both EPRS & MassPerform dashboards to view the progress of each step (i.e., action items) within a task. For example, you could view the MassPerform Kickoff step completion for both Manager Schedule 1st Check-in & Set Expectations, and Employee Enter Goals action items. During EPRS Stage A, for example, you could view step completion for Performance Planning and supervisor/employee/reviewer signatures.

Bar graphs will display how many people within each step are completed, in progress, not started, and past due (when applicable). To see additional performance review task status data, hover over the top-right corner of the report to reveal a drop-down arrow. This allows you to view the details of the report, export data to an Excel file, or refresh the graph for the most up-to-date information. The drop-down arrow provides three navigation options:

- **View Details –** This brings additional details regarding the agency, secretariat, department ID, supervisor information, performance review start dates, email, and more.

- **Export in Excel –** Export the detailed information into an editable, shareable data file.

- **Refresh** – This refreshes the chart with the most up-to-date data.
    - *Please note: Reports should automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section. Always check the last refreshed date as sometimes it does not automatically refresh.*

Reports: Overdue EPRS Review by Step for Supervisor/Employee/Reviewer & "Past Due" MassPerform Performance Steps for Manager/Employee

Select these reports to view which users are overdue/past due within the EPRS & MassPerform tasks. The reports include MassPerform On-Cycle and Off-Cycle hires, and EPRS Standard, Compressed, and Stretched hires. These reports are intended to provide you with a list of names, email addresses, and more, for which you can proactively reach out to ensure performance review compliance. While the system *does* generate reminder emails, those emails do not continue in perpetuity, so we advise coordinators to be proactive in connecting with those who are past due.

To see additional performance review task status data, hover over the top-right corner of the report to reveal a drop-down arrow. This allows you to view the details of the report, export data to an Excel file, or refresh the graph for the most up-to-date information. The drop-down arrow provides three navigation options:
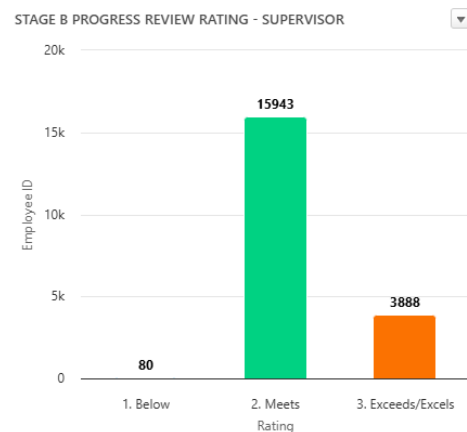
- **View Details –** This brings additional details regarding the agency, secretariat, department ID, supervisor information, performance review start dates, email, and more.

- **Export in Excel –** Export the detailed information into an editable, shareable data file.

- **Refresh** – This refreshes the chart with the most up-to-date data.
    - *Please note: Reports should automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section. Always check the last refreshed date as sometimes it does not automatically refresh.*
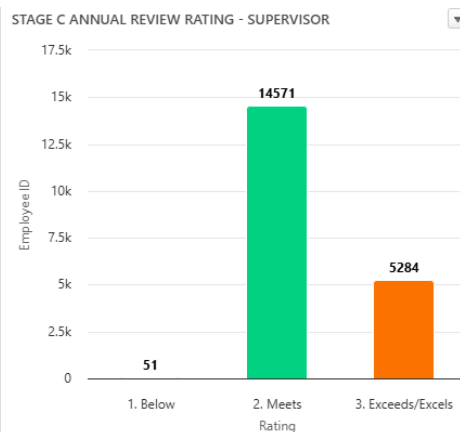
Reports: EPRS Ratings

During Stage B and C, progress and annual review summary ratings are assigned. At Stage B, only the supervisor provides a rating. At Stage C, both the supervisor and reviewer provide a rating and the reviewer's rating is considered the final annual review on record. This dashboard can be used to monitor any misalignment on ratings between the supervisor and reviewer.

Please note that if a rating is entered in error and then changed, the system will only recognize the initial entry.
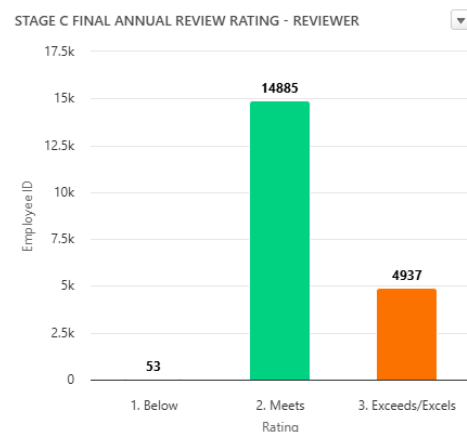
- **View Details –** This brings additional details regarding the agency, secretariat, department ID, supervisor information, performance review start dates, email, and more.

- **Export in Excel –** Export the detailed information into an editable, shareable data file.

- **Refresh** – This refreshes the chart with the most up-to-date data.
    - *Please note: Reports should automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section. Always check the last refreshed date as sometimes it does not automatically refresh.*

STAGE B PROGRESS REVIEW RATING - SUPERVISOR

Last refreshed 9/22/2025 9:29 AM

STAGE C ANNUAL REVIEW RATING - SUPERVISOR

Last refreshed 9/22/2025 9:27 AM

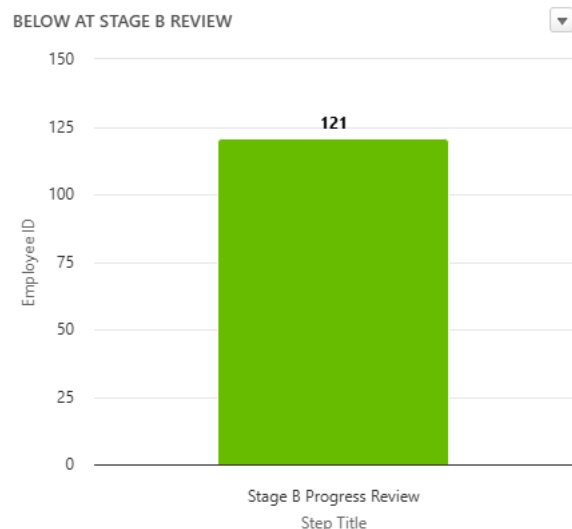**STAGE C FINAL ANNUAL REVIEW RATING - REVIEWER**
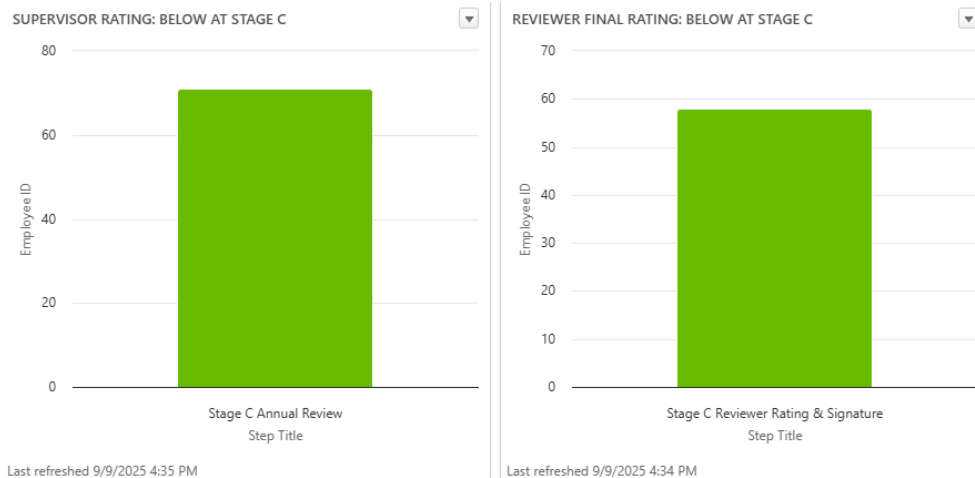

Last refreshed 9/22/2025 9:28 AM

Reports: EPRS Below at Stage B/C

During Stage B and C, progress and annual review summary ratings are assigned. This report may be used by coordinators to monitor employees who have been assigned below ratings.

As a reminder, supervisors must give notice and begin employee coaching by April 1st to comply with the 90-day notice requirement for any employee who is projected to receive a "Below" summary rating at the Stage C Annual Review.

BELOW AT STAGE B REVIEW

Last refreshed 9/15/2025 9:03 AM

SUPERVISOR RATING: BELOW AT STAGE C

Last refreshed 9/9/2025 4:35 PM

REVIEWER FINAL RATING: BELOW AT STAGE C

Last refreshed 9/9/2025 4:34 PM

Reports: MassPerform Wrap Up Employee Signoff and Manager Signoff

The employee signoff report displays the number of employees who have yet to sign their completed annual performance review. The manager signoff report displays the number of managers who have yet to sign the performance review they completed for their employee(s). The signature step is the last step in the Wrap Up task and takes place after managers have completed the manager assessment and rating step, and coordinators validate the ratings.

These reports are intended to provide you with a list of employees and managers who need to complete this step to conclude that fiscal year's annual review process. Please proactively reach out to those who are incomplete to ensure performance review compliance. While the system does generate reminder emails, those emails do not continue in perpetuity, so we advise coordinators to be proactive in connecting with those who are past due.

FY23 EMPLOYEE SIGNOFF

Last refreshed 11/24/2023 10:29 AM

FY23 MANAGER SIGNOFF

Last refreshed 12/14/2023 4:00 PM

To see additional performance review task status data, hover over the top-right corner of the report to reveal a drop-down arrow. This allows you to view the details of the report, export data to an Excel file, or refresh the graph for the most up-to-date information. The drop-down arrow provides three navigation options:

- **View Details –** This brings additional details regarding the agency, secretariat, department ID, supervisor information, performance review start dates, email, and more.

- **Export in Excel –** Export the detailed information into an editable, shareable data file.

- **Refresh** – This refreshes the chart with the most up-to-date data.

o *Please note: Reports should automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section. Always check the last refreshed date as sometimes it does not automatically refresh.*

Missing Data for EPRS & MassPerform Dashboards

Select this report to view the following information directly transmitted from HR/CMS:

- Employees with a missing supervisor or manager (e.g., blank "reports to," reporting to a vacant position number, or reporting to themselves)

- Employees with missing emails

- Employees with missing ACES performance flags (MassPerform only)

    Please note: The criteria excludes post-retiree (PR) employees, but will include statutory (ST) and excess quota (EQ) positions. If someone is on the report, this does not always mean something needs to be fixed. We encourage you to review this report regularly to ensure that managers who are subject to a performance review have the ACES eligible flag turned on in HR/CMS.

- Employees with missing expectations or job duties

    o Expectations (MassPerform only)

    o Diversity expectations (MassPerform only)

    o Job duties (EPRS only)

To ensure you are viewing the most up-to-date information, please click the **Options** menu button and click the **Refresh** button from the drop-down menu. This will refresh all missing data reports simultaneously. Review the last refreshed date/time underneath each report to ensure you are viewing the most recent data.
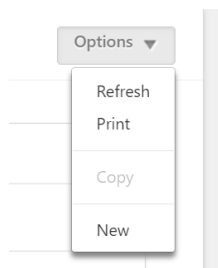
Missing Expectation Report

At Kickoff, managers are expected to set clear expectations for their employees. This report will show you which employees are missing expectations. As coordinator, we ask that you periodically run this report to ensure all of your managers have entered expectations for their employees.

MISSING MASSPERFORM EXPECTATIONS FY26

No: 930 (100.0 %)
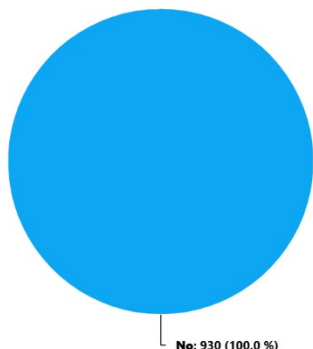
Last refreshed 9/26/2025 1:28 PM

Missing Diversity Expectation Report

All managers are required to have at least one diversity expectation. As a coordinator, we ask that you periodically run this report to ensure compliance. You may notice that names on this report also appear on the Missing Expectation Report. Please keep this in mind when sending out targeted communications as there is often overlap between the two populations.

MISSING MASSPERFORM DIVERSITY EXPECTATION FY26

No: 1872 (100.0 %)
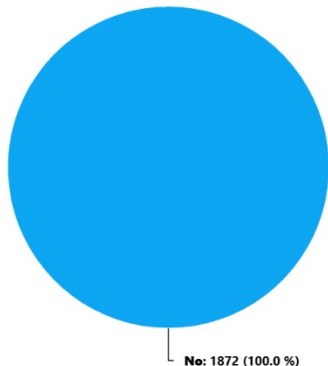
Last refreshed 9/26/2025 1:28 PM

Missing Job Duties Report

Job duties describe the "what," "how," and "why" of work assignments. The main job duties are those duties which are most frequently performed and are most important for that performance review year. As a coordinator, we ask that you periodically run this report to ensure all supervisors have entered job duties for their employees. Please note, users in a stretched task with job duties may appear in this report because of limitations in our reporting system. We recommend you cross-reference the report to check for these stretched-task users, as they may be included despite having job duties present.

MISSING EPRS JOB DUTIES FY26

No: 5801 (100.0 %)

No: 5801 (100.0 %)
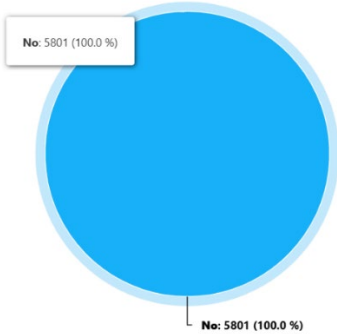
Last refreshed 9/26/2025 1:39 PM

EPRS and MassPerform Employee Development Plan

Select this report to view the following information on EPRS and MassPerform Employee Development Plans:

- EPRS Employee Development Plan Status
- MassPerform Employee Development Plan Status
- EPRS Employee Development Plan Objective
- MassPerform Employee Development Plan Objective

To ensure you are viewing the most up-to-date information, please click the **Options** menu button and click the **Refresh** button from the drop-down menu. This will refresh all Employee Development Plan simultaneously. Review the last refreshed date/time underneath each report to ensure you are viewing the most recent data.

Please note, the EPRS Employee Development Plan is not the Remedial Development Plan (RDP). The RDP is still completed outside of the system via the paper form.
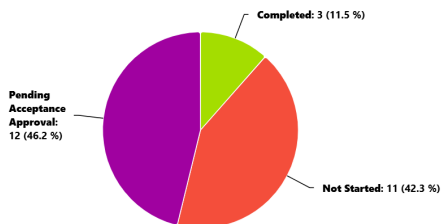
Employee Development Plan Status

The Development Plan Status report will detail the number of plans along with their completion statuses. For additional detail on plan contents, you may review the Development Plan Objective report.

EPRS
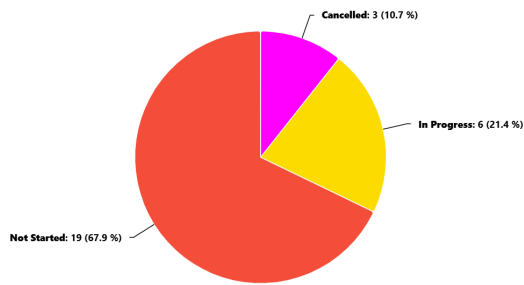This dashboard allows you to report on Employee Development Plan status.

EPRS - EMPLOYEE DEVELOPMENT PLAN STATUS

Completed: 3 (11.5 %)

Pending
Acceptance
Approval:
12 (46.2 %)

Not Started: 11 (42.3 %)

Last refreshed 10/15/2025 11:04 AM

MassPerform
This dashboard allows you to report on Employee Development Plan status.

Cancelled: 3 (10.7 %)
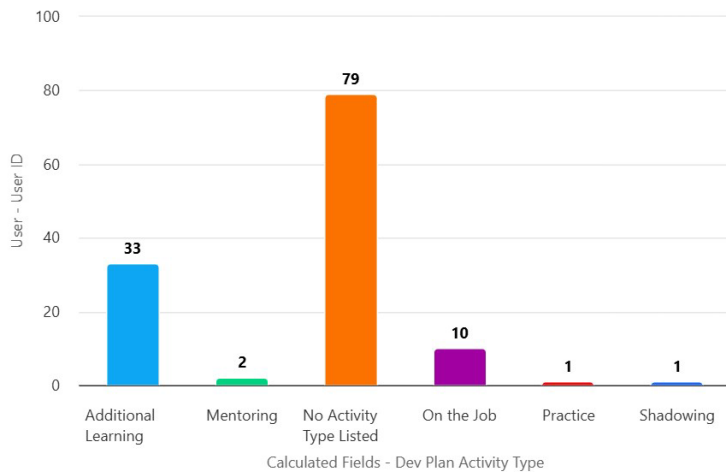
In Progress: 6 (21.4 %)

Not Started: 19 (67.9 %)

Last refreshed 10/15/2025 11:14 AM

Employee Development Plan Objectives

The Development Plan Objective reports will detail all contents within the performance reviews as illustrated by development activity type. The aim of this report is to show coordinators the entire contents of the development plan. Since each development activity is displayed, you may notice employees' names listed multiple times as a result. If you are seeking a development plan count with employees' names listed only once, we recommend exporting the Employee Development Plan Status report.
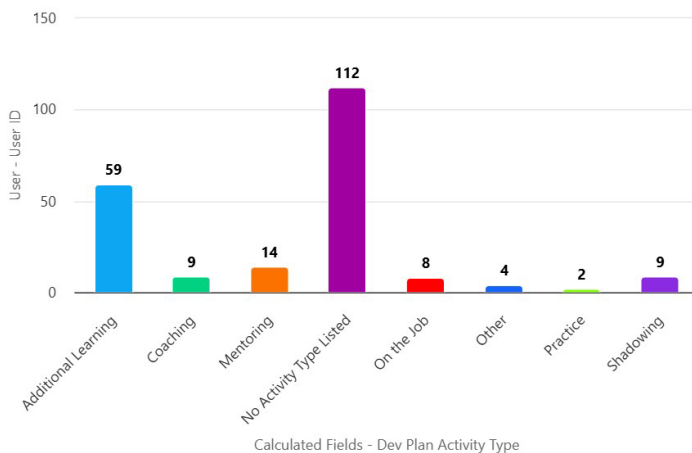
EPRS

EPRS - EMPLOYEE DEVELOPMENT PLAN OBJECTIVES

User - User ID vs Calculated Fields - Dev Plan Activity Type:
- Additional Learning: 33
- Mentoring: 2
- No Activity Type Listed: 79
- On the Job: 10
- Practice: 1
- Shadowing: 1

Last refreshed 10/21/2025 3:49 PM

MassPerform

MASSPERFORM - EMPLOYEE DEVELOPMENT PLAN OBJECTIVES

User - User ID vs Calculated Fields - Dev Plan Activity Type:
- Additional Learning: 59
- Coaching: 9
- Mentoring: 14
- No Activity Type Listed: 112
- On the Job: 8
- Other: 4
- Practice: 2
- Shadowing: 9

Last refreshed 10/21/2025 3:52 PM