

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.

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

Reports: EPRS Stage, 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.
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Report: Completed EPRS Review by Step

Select this report to review all completed steps within the applicable task: Stage A, B, or C. The report contains standard, compressed, and stretched cycle information. The bar graph will have three columns for Stage A and B, and four columns for Stage C (as the employee will have two steps in Stage C).

Column label key by role:

Supervisor – Stage A Performance Planning, Stage B Progress Review, and Stage C Annual Review

Employee – Stage A Supervisor & Employee Signature, Stage B Supervisor & Employee Signature, and Employee Final Signature

Reviewer – Stage A Reviewer Signature, Stage B Reviewer Signature, and Stage C Reviewer Rating & Signature

- **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

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.
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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. Please note that if a rating is entered in error and then changed, the system will only recognize the initial entry.

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.

- **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: 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.



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.

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.

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.

