Dashboard Reports for Coordinators

The following steps guide you through the process to run dashboard performance reports in MyPath.

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. Select **Reports** and then **Dashboards.**

STEP 3. From the Dashboards screen, hover over the top-right corner of emach Kickoff, Wrap Up, or Missing Data 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.

Coordinator Dashboard Reports

Summary Kickoff Performance Review Task Status Dashboard

Select this report to view the agency or secretariat's progress within the MassPerform Kickoff task. The Kickoff report includes performance review tasks for both on and off-cycle hires. The pie chart is broken up into percentages based on task status:

- **Not Started** – The performance review has not started. 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.
- **Completed** – All required performance review steps are complete for the review.

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: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Managers with "Past Due" Performance Steps

Select this report to view the managers who have a past due task status. This report is intended to provide you with a list of manager 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 managers who are past due.

The line chart is displayed by agency and how many managers are currently past due for their assigned performance review task(s).

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: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Employees with "Past Due" Performance Steps

Select this report to view the managers who have a past due task status. This report is intended to provide you with a list of manager 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 managers who are past due.

The line chart is displayed by agency and how many employees are currently past due for their assigned performance review task(s).

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: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Wrap Up Performance Review Status Report

Select this report to view managers' progress within the MassPerform Wrap Up task. The Wrap Up report includes performance review tasks for both on and off-cycle hires. The pie chart is broken up into percentages based on performance review completion:

- **Not Started** – The performance review has not been started. 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** – The performance review was started but is still in progress. This status also occurs when the review is not started, and a review step becomes past due.
- **Incomplete** – The performance review was not completed by the due date.
- **Completed** – The performance review is complete.

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, current step, 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: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Wrap Up Performance Review Status by Step Title Report

Select this report to view the progress of each step within the MassPerform Wrap Up task. The Wrap Up report includes performance review tasks for both on and off-cycle hires. The pie chart is broken up into percentages based on performance review completion within each step. The chart will display how many people are currently in which step of the Wrap Up task.

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, current step, 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: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Employees’ Wrap Up Performance Review Past Due

Select this report to view which employees’ Performance Reflection is past due within the MassPerform Wrap Up task. The report includes both on and off-cycle hires and displays how many employees are past due within your agencies.

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:

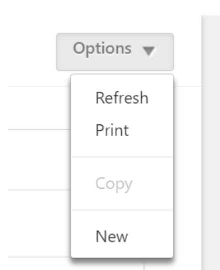
- **View Details** – This brings additional details regarding the agency, secretariat, task/step status, name, email, supervisor information, and more.
- **Export in Excel** – Export the detailed information into an editable, shareable data file.
- **Refresh** – This refreshes the chart with the most up-to-date data.
    - *Please note: the reports automatically refresh each time you log in. The time of the refresh will be displayed at the bottom of each report section.*

Missing Data

Select this report to view the following information directly transmitted from HRCMS:

- Employees with missing supervisor or manager
- Employees with missing emails
- Employees with missing ACES (performance) flags
    - 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 HRCMS.

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

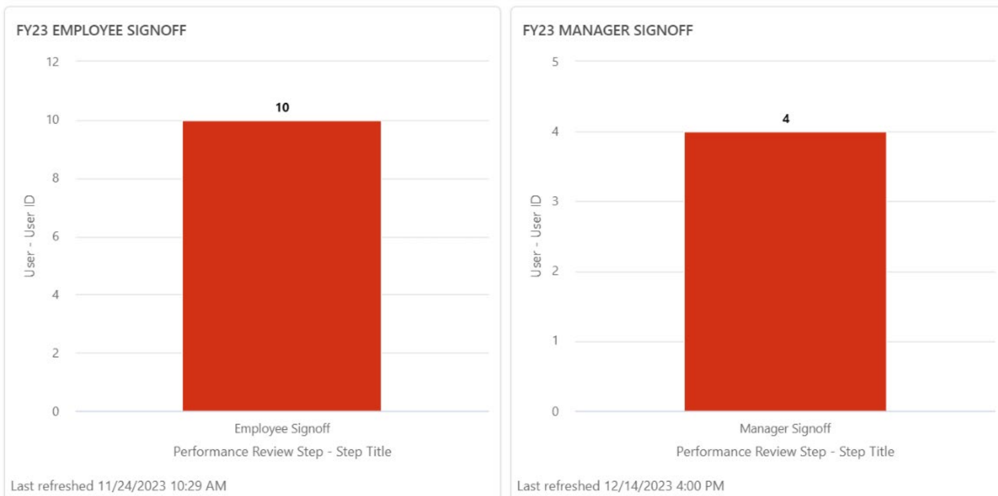


To learn more about the importance of this data, please review the Agency Coordinator Handbook.

Wrap Up Employee 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, task/step status, name, email, supervisor information, and more.
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