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

The following steps guide managers through the process of advancing (carrying over) expectations to the current fiscal year that they previously held for their employee(s).

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

**STEP 2.** On the homepage, click the **MassPerform Expectations & Goals** button.



**STEP 3.** Next, click the **Team Expectation & Goals** tab. Click the **Current Period** drop-down menu button and select the **Previous Period** button from the drop-down menu.
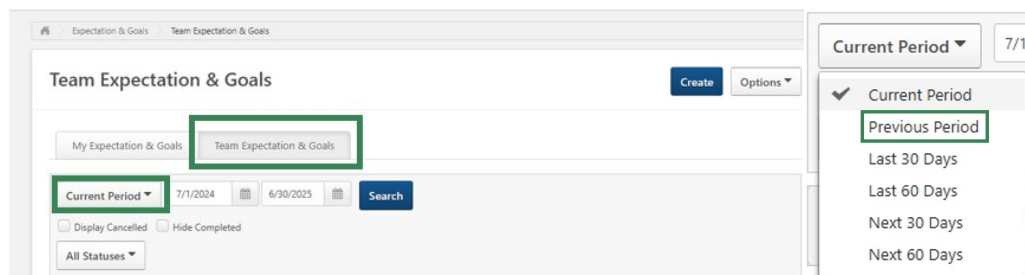


**STEP 4.** Find the employee for whom you'd like to pull in previous expectations. Click the **Expand User Goals** side arrow button. This expands all previous expectations/goals.



**STEP 5.** Next, click the **Goal Options** drop-down menu button on the right side of each previous expectation you wish to transfer. Click the **Advance** button from the drop-down list for any expectations you'd like to carry over into the current review period.
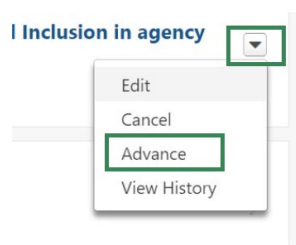
**STEP 6.** Make any necessary updates to the dates, comments, goals within the expectation, etc.

**STEP 7.** At the bottom of the page, in the **Assignment** section, click the **Your Team** radio button.

> **Note:** *The expectation will automatically be assigned to "Yourself". To advance the expectation to an employee(s), you <u>must</u> manually change the assignment to "Your Team."*



**STEP 8.** A list of your direct reports will appear. Check the box to the left of the associated employee's name. *You will see your own name appear in the list as well. It's important to ensure you are only selecting the employee(s) to whom you wish to advance the expectation.*

> ***Do not cascade down to any indirect reports.*** *Only select the checkboxes to the left of each <u>direct</u> report to whom you wish to advance the expectation to the new fiscal year.*



> **Note:** *All direct reports, including any bargaining unit or confidential employees, will appear on this list. Only advance expectations to your **management** direct reports who participate in MassPerform. Do not use the "Direct and Indirect Reports" button! It is best practice to advance an expectation to one employee at a time to ensure you are not assigning expectations to the wrong people.*

**STEP 9.** Click the **Submit** button to advance the expectation to the selected employee's current Kickoff task. Repeat as necessary for each former expectation you wish to advance to the current fiscal year.
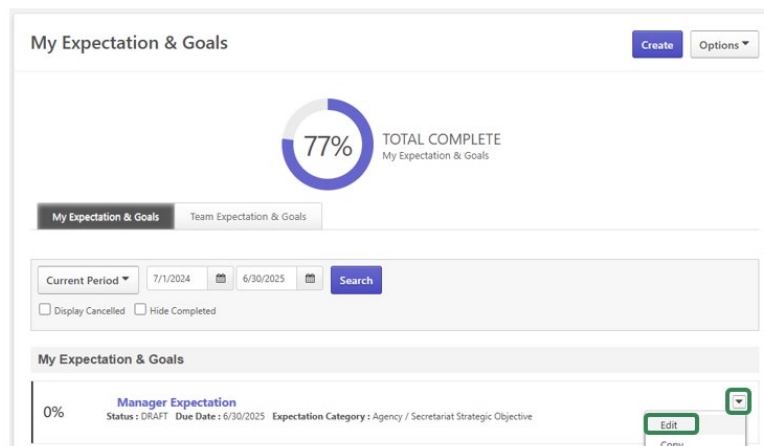
# How to Submit a Draft Expectation

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

**STEP 2.** On the homepage, locate the **MassPerform Expectations & Goals** button.



**STEP 3.** In your **My Expectation & Goals** tab, scroll down until you locate the draft expectation.

**STEP 4.** Click the **Goal Options** dropdown button and then select the **Edit** menu item.



**STEP 5.** Review and edit the expectation as needed.

> **Note:** Do not alter the **Start Date** and **Due Date** as it defaults to the applicable performance review period.

**STEP 6.** Ensure that the correct employee or employees have been selected under the **Assignment** section.



**Important:** Never select the **Direct and Indirect Reports** checkbox.

**STEP 7.** Click the **Submit** button to add the expectation to the performance review or click the **Cancel** button to return to the prior screen.