

How to Advance Past Expectations to a New Performance Review Cycle

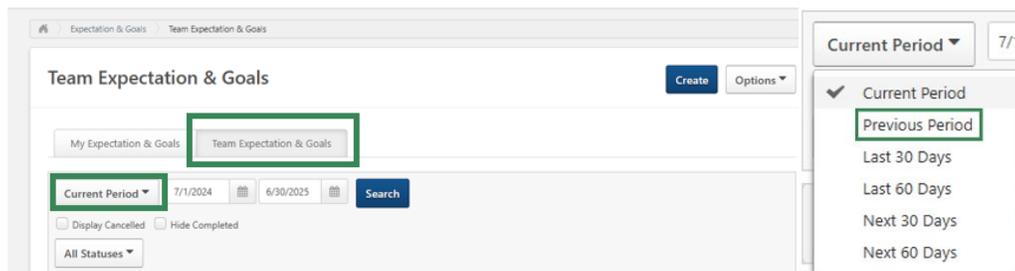
The following steps guide managers through the process of advancing (carrying over) expectations to the current fiscal year that they previously held for their employee(s).

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.



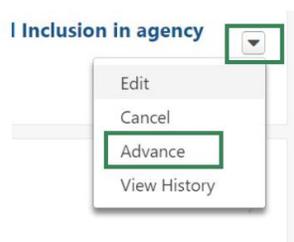
STEP 3. Next, click the **Team Expectation & Goals** tab. Click the **Current Period** drop-down menu button and select the **Previous Period** button from the drop-down menu.



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 must manually change the assignment to “Your Team.”

Assignment *
Select which users or OUs this goal should be assigned to.
 Yourself 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 direct report to whom you wish to advance the expectation to the new fiscal year.

Assignment *
Select which users or OUs this goal should be assigned to.
 Yourself Your team Custom Assignment

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input type="checkbox"/>	David Wiggins	Class Comp Mgr	<input type="checkbox"/>
<input type="checkbox"/>	Jared Garland	Asst Dir, Class Comp	<input type="checkbox"/>

Options
 Create a separate goal for each user.

Cancel Save as Draft **Submit**

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

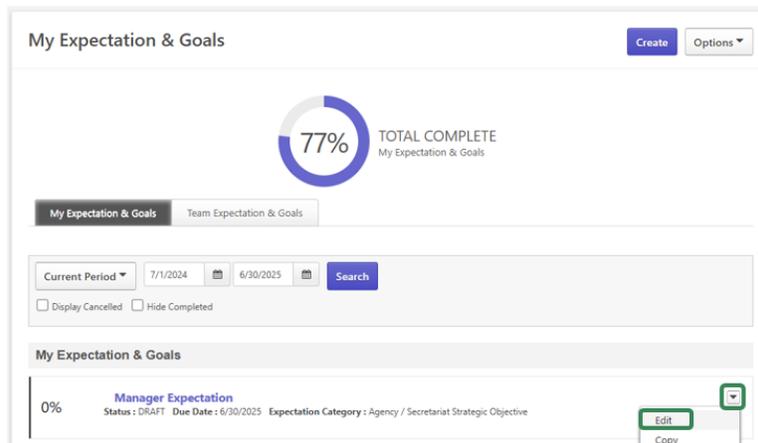
STEP 1. Sign in to your **MyPath** account at **mass.csod.com** (Login is your employee ID).

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.