MyPath〉〉   MassPerform

Standard Reports for Managers and Coordinators

The following steps guide you through the process of running standard performance reports in MyPath.

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

STEP 2. From the homepage, expand the menu options from the top-right corner. Select **Reports,** and then **Standard Reports.**

STEP 3. From the Reports screen, select the **Performance** Icon and a list of performance reports will appear.

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

All Manager Reports

Goal Progress Report

Note: *For the sake of this report, goals refer to expectations. This will not display the employee's individual goals, rather the manager's expectations. Additionally, this report will display **draft** expectations as well as submitted expectations (i.e., if a manager has started the Manager Schedule 1st Check-in and Set Expectations task, but has not submitted, those draft expectations **will** appear).*

Select this report to review the ***overall progress*** of one or more employees' expectations. ***One aggregate percentage will be applied to all employee's expectations*** (i.e., if an employee has three goals at 75%, 50%, and 25% complete, their aggregate goal progress will show as 50% for that expectation).

STEP 1. From the Goal Progress Report page, select a **Date Filter** for the goals you wish to view or leave as is to view the entire fiscal year.

STEP 2. If you wish to view everyone within your agency, leave the User Criteria blank as it will default to showing you everything for everyone for whom you are an Agency Coordinator.

The **User Criteria** section allows you to select the employees whose goals you wish to view. To select specific employees, select **Users** from the drop-down list**.** Click the small pop-up link that appears next to the drop-down list. A new window will open where you will search for the employee(s) you wish to view. *To view all your employees, enter your own last name in the **Manager's Last Name** field and click **Search***.

From the search results, click the **blue plus sign** by each employee whom you wish to view, then click **Done.** You will return to the Goal Progress report screen and see the names you selected in the User Criteria Section. Uncheck the **Include Subordinates** box if you do not wish to view the goal progress of the employee's direct reports.

STEP 3. Use the **Expectation Category** drop-down menu in the **Advanced Filters** section to view specific expectations. You may also keep this as is and then filter the expectation category within your Excel spreadsheet. **Tip:** Be sure to select the radio button next to **Show All Goals** if you wish to view every expectation that each manager has drafted or set.

Note: "OU" refers to Organizational Units, which provide various descriptors for employees, such as Division (Department) or Position. Keep this as none if you do not wish to display this information.

STEP 4. From the **Output** section, select **Printable Version** for a PDF format of the report or select **Export to Excel** to view your results in spreadsheet form.

Goal Target Report

Select this report to review the ***specific progress*** for one or more employees' goals. This report will show individual percentages of completion for each employee goal.

STEP 1. From the Goal Progress Report page, select a **Date Filter** for the goals you wish to view.

STEP 2. The **User Criteria** section allows you to select the employees whose goals you wish to view.

To view all goals for both you and your employees, leave the User Criteria blank.

To select specific employees, select **Users** from the drop-down list**.** Click the small pop-up link that appears next to the drop-down list. A new window will open where you will search for the employee(s) you wish to view. *To view all your employees, enter your own last name in the **Manager's Last Name** field and click **Search**.*

From the search results, click the **blue plus sign** by each employee who you wish to view, then click **Done.** You will return to the Goal Progress report screen and see the names you selected in the User Criteria Section. Uncheck the **Include Subordinates** box if you do not wish to view the goal progress of the employee's direct reports.

STEP 3. Use the **Advanced Filters** section to apply additional criteria to your report.

Note: "OU" refers to Organizational Units, which provide various descriptors for employees, such as Division (Department) or Position.

STEP 4. From the **Output** section, select **Printable Version** for a PDF format of the report or select **Export to Excel** to view your results in spreadsheet form.

Performance Review Report

Select this report to review an individual employee's performance review.

STEP 1. From the Performance Review Report page, use the **Advanced Filter** section to select the employee whose review you wish to review. Select the Performance Review task you wish to review (either Kickoff, Off-Cycle Kickoff, or Wrap Up).

> **Note:** Wrap Up simply appears as *FYXX MassPerform* and provides a summary of the entire year and final performance rating if one has been assigned.

STEP 2. From the Output section, select **Print Performance Review** and a PDF report will download.

Performance Review Rating Report

Select this report to review one or more employees' performance ratings.

STEP 1. Use the **User Criteria** section to select the employees whose ratings you wish to view.

> To view all ratings for all your employees, leave the User Criteria blank.

> To select specific employees, select **Users** from the drop-down list**.** Click the small pop-up link that appears next to the drop-down list. A new window will open where you will search for the employee(s) you wish to view. *To view all your employees, enter your own last name in the **Manager's Last Name** field and click **Search**.*

> From the search results, click the **blue plus sign** by each employee who you wish to view, then click **Done.** You will return to the Goal Progress report screen and see the names you selected in the User Criteria Section. Uncheck the **Include Subordinates** box if you do not wish to view the goal progress of the employee's direct reports.

STEP 2. In the **Advanced Filters** section, select the following criteria:

- Performance Review Task**: FYXX MassPerform**
- Review Section: Check **Manager Rating** (leave others unchecked)
- Rating Display: Select **Text**
- User Status: *Optional to include inactive employees*
- In-Progress Task: Check **Include reviews that are in progress**
- Display OU: *Optional to include Organizational Unit information*

STEP 3. From the **Output** Section select **Printable Version** for a PDF format of the report or select **Export to Excel** to view your results in spreadsheet form.

Performance Review Step Status Report

Select this report to view where one or more of your employee's reviews is currently at in the MassPerform process.

STEP 1. Use the **User Criteria** section to select the employees whose review steps you wish to view.

> To view review steps for all your employees, leave the User Criteria blank.

> To select specific employees, select **Users** from the drop-down list**.** Click the small pop-up link that appears next to the drop-down list. A new window will open where you will search for the employee(s) you wish to view. *To view all your employees, enter your own last name in the **Manager's Last Name** field and click **Search**.*

> From the search results, click the **blue plus sign** by each employee who you wish to view, then click **Done.** You will return to the Goal Progress report screen and see the names you selected in the User Criteria Section. Uncheck the **Include Subordinates** box if you do not wish to view the goal progress of the employee's direct reports.

STEP 3. From the **Advanced Filters** section, select which performance review task you wish to view, then check the boxes for each step within the task you wish to view.

    Note: The Wrap Up task appears simply as *FYXX MassPerform.*

    Optionally select OU (organizational Unit) criteria to include.

STEP 4. From the **Output** Section select **Printable Version** for a PDF format of the report or select **Export to Excel** to view your results in spreadsheet form.

Coordinator-Only Reports

Bulk Performance Reviews

Select this report to download one or more performance review reports for select users.

Please note: Depending on file size, the run time may take anywhere from a few minutes to a few hours. While loading, you may close the report and check back later.

STEP 1. From the Bulk Performance Review Report page in the Review Filters section, select the **Date Criteria** *or* **Task** for the reviews you wish to view (either Kickoff, Off-Cycle Kickoff, or Wrap Up).

Note: Wrap Up simply appears as *FYXX MassPerform* and includes review information and the rating (if assigned) for the entire year.

STEP 2. The **User Criteria** section allows you to select the employees in your agency whose reviews you wish to view.

To view all employees in your agency, select **Group** as the User Criteria, then click the arrow icon to the right of the drop-down list. A new window will open.

From the window that opens, toggle between pages and find the **Performance Process Groups** list and click the **small black plus sign** to the left of the list name to expand the list.

From the expanded list, select the **blue plus sign** next to the group titled **0001_Performance Eligible Users**. Then click **Done** at the bottom of the window.
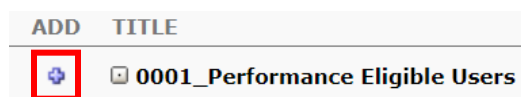
STEP 3. Back in the original window, confirm that your group appears, then *uncheck* the **Include Subordinates** box.
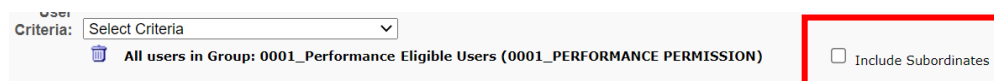
STEP 4. In the **Advanced** Section, choose whether you want to view reviews that have been *completed* on or during your defined date criteria, or all reviews for which your date criteria overlap.

Select either the "employee view" or "manager view" of the review.

STEP 5. In the **Process Report** Section, optionally assign your report a title, then click **Process Report.**

The report and its run status will appear below in the Processed Reports section. Refresh the page until a zip file icon appears in the **Output** Section.

Double-click the file folder and a download will begin. An individual PDF document of each employee's review will be available in the zip file.

STEP 6. If you wish to run the report with the same criteria in the future, you can review the report criteria by selecting the **View Details icon (eye with paper)**.

To refresh the report data, select the **Refresh icon (blue arrows)** and refresh the page until a zip file icon appears in the Output Section.
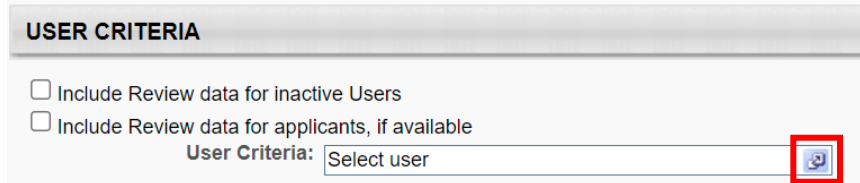
Performance Review Details Report

Select this report to download one or more performance review reports for *a single user*.

STEP 1. From the Performance Review Details Report page in the Review Filters section, select the **Date Criteria** for the reviews you wish to view.

STEP 2. From the User Criteria section, check whether you would like to include results for Inactive Users (disregard the option to include results for applicants).

Click the arrow icon to the right of the User drop-down list. A new window will open.

USER CRITERIA

☐ Include Review data for inactive Users
☐ Include Review data for applicants, if available
User Criteria: Select user
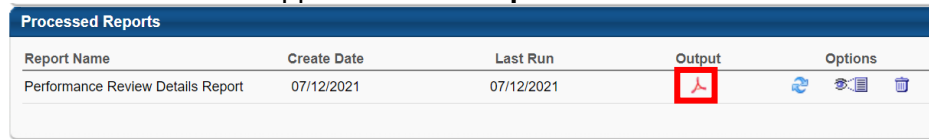
Enter search criteria, then click the employee's name to return to the report main screen.

STEP 3. In the **Advanced** Section, choose whether you want to view reviews that have been *completed* on or during your defined date criteria or all reviews for which your date criteria overlap.

STEP 5. In the **Process Report** Section, optionally assign your report a title, then click **Process Report.**

The report and its run status will appear below in the Processed Reports section. Refresh the page until a PDF file icon appears in the **Output** Section.

Processed Reports

Report Name	Create Date	Last Run	Output	Options
Performance Review Details Report	07/12/2021	07/12/2021		

Click the PDF file icon and a download will begin. Select the downloaded file to view the report.

STEP 6. If you wish to run the report with the same criteria in the future, you can review the report criteria by selecting the **View Details icon (eye with paper)**.

To refresh the report data, select the **Refresh icon (blue arrows)** and refresh the page until a zip file icon appears in the Output Section.

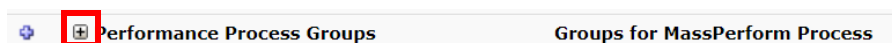# Performance Review Status Distribution

Select this report to view the distribution of performance ratings for a specified set of users.

STEP 1. From the Performance Review Status Distribution Report page, the **User Criteria** section allows you to select the employees in your agency whose reviews you wish to view.

To view all employees in your agency, select **Group** as the User Criteria, then click the arrow icon to the right of the drop-down list. A new window will open.

Group

From the window that opens, toggle between pages and find the **Performance Process Groups** list and click the **small black plus sign** to the left of the list name to expand the list.

⊕ Performance Process Groups   Groups for MassPerform Process

From the expanded list, select the **blue plus sign** next to the group titled **0001_Performance Eligible Users.** Then click **Done** at the bottom of the window.

ADD	TITLE
⚙	☐ 0001_Performance Eligible Users

STEP 2. Back in the original window, confirm that your group appears, then make sure the **Include Subordinates** box is checked.

User
Criteria: Select Criteria ▾

🗑 All users in Group: 0001_Performance Eligible Users (0001_PERFORMANCE PERMISSION)

☑ Include Subordinates

STEP 3. Under the **Advanced Criteria** section, select **FYXX MassPerform** from the Performance Review Task drop-down list. (Ratings are not assigned during Kickoff tasks, so that report will yield no results.)

Select **Manager** as the Performance Review Data Set.

STEP 4. Click **Search**. Below **Distribution of Ratings**, a bar chart of ratings will appear with a list of all employees and ratings below (may appear on multiple pages depending on the quantity of users).

Note: Ratings on this chart will appear as numerical values, but employees' reviews will show the corresponding text version of the rating:

Numerical Rating:	Text Rating:
1.0	Below Expectations
2.0	Successful Performer
3.0	Highly Effective
4.0	Exceptional

STEP 5. If desired, use the Excel or Printer icon in the bottom right-hand corner of the Rating Distributions Chart to export the data to Excel or to print.

Task User Status

Use this report to view the Kickoff or Wrap Up task progress of one or more users. Note that this report will only show the completion progress for an *entire task*. If you wish to view the status of individual steps within a task (e.g., Manager Enter Expectations or Employee Enter Goals at Kickoff), use the Performance Review Step Status Report (All Managers Section of this Job Aid).

STEP 1. From the Task User Status Report page, the **User Criteria** section allows you to select the employees in your agency whose task status you wish to view.

To view all employees in your agency, select **Group** as the User Criteria, then click the arrow icon to the right of the drop-down list. A new window will open.

From the window that opens, toggle between pages and find the **Performance Process Groups** list and click the **small black plus sign** to the left of the list name to expand the list.

From the expanded list, select the **blue plus sign** next to the group titled **0001_Performance Eligible Users.** Then click **Done** at the bottom of the window.

STEP 2. Back in the original window, confirm that your group appears, then *uncheck* the **Include Subordinates** box.

STEP 3. Under the **Advanced Filters** section, select the arrow icon to the right of **Selected Tasks.**

From the pop-up window, click the **blue plus sign** next to the task(s) you wish to view (Kickoff, Off-Cycle Kickoff, or Wrap Up). Or, to view the status of all tasks, select the **blue plus sign** next to **Add All Tasks** above the list of tasks.

Note: Wrap Up simply appears as *FYXX MassPerform*.

Your selected tasks will appear at the top. Use the trash can icon next to any tasks you wish to remove. Click **Done** when you have the desired tasks added.

STEP 4. Back on the main report page, confirm that you see your selected tasks.

If desired, check the box to **Include Task Completion Dates**.

Select whether to sort by User (employee) or by Task.

STEP 4. Select an option for reviewing your results: Printable Version, Excel, or Text.