Standard Reports for Managers, Supervisors, 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, click the **Show Navigation Menu** button from the top-right corner. Click the **Reports** button from the drop-down menu and then click the **Standard Reports** button**.**

STEP 3. From the **Reports** screen, select the **Performance** icon button 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/Supervisor Reports

Goal Progress Report (MassPerform Expectations)

This report is most applicable to MassPerform. Please note, for the sake of this report, "goal" refers to expectations set by the manager. Therefore, this report will not describe individual employee goals. If you are seeking a report that lists individual employee goals and their goal target progress, please click here. Additionally, this report will show both submitted and drafted information.

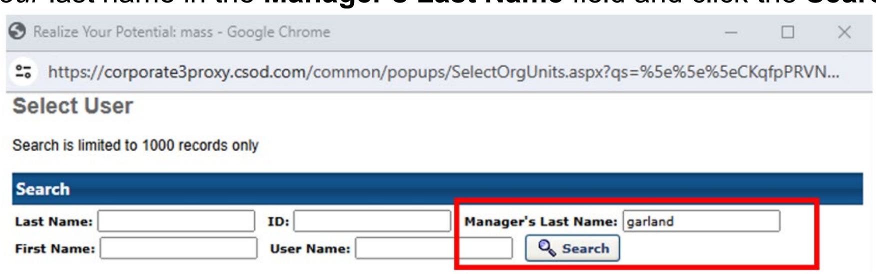
*This report will provide a list of expectations and the **overall progress** toward those expectations. **One aggregate percentage will be applied to all employee's expectations** (i.e., if an employee has three goals at 100%, 50%, and 0% complete, their aggregate expectation progress will show as 50% for that expectation).*

STEP 1. From the **Goal Progress Report** page, within the Date Filters section**,** choose the date criteria for the goals you wish to view or leave as is to view the entire fiscal year (i.e., July 1 – June 30).

STEP 2. If you wish to view everyone within your agency(s), leave the User Criteria section blank as it will default to show you everything for everyone within your agency(s).

The User Criteria section allows you to select the employees whose goals you wish to view. To select specific employees, click the **Users** button from the **Select Criteria** drop-down menu button**.** Click the arrow icon link that appears next to the drop-down menu.

A new window will open where you will search for the employee(s) you wish to view. To view all your employees, enter *your* last name in the **Manager's Last Name** field and click the **Search** button.



From the search results, click the **blue plus sign** by each employee whom you wish to view, then click the **Done** button**.** Please note, the **Done** button will only appear after you've made your selection. You will return to the **Goal Progress Report** page 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. This defaults to being checked so be sure to uncheck it if preferred.*

STEP 3. In the Advanced Filters section, locate the drop-down menu next to the Expectation Category. This automatically defaults to "All." You may then filter the expectations in the Excel spreadsheet. Alternatively, from the drop-down menu, click the expectation category for the goals you wish to view.

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, click the **Printable Version** link for a PDF format of the report, or click the **Export to Excel** link to view your results in spreadsheet format.

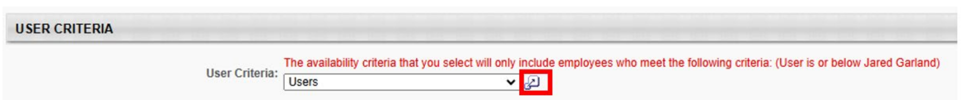
Goal Target Report

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

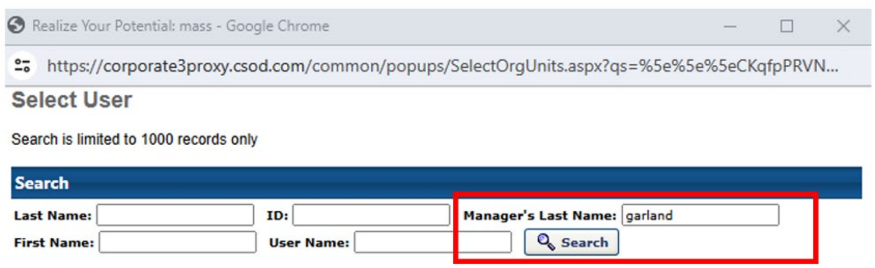
STEP 1. From the **Goal Target Report** page, within the Date Filters section, choose the **Date Criteria** for the goals you wish to view or leave as is to view the entire fiscal year (i.e., July 1 – June 30).

STEP 2. If you wish to view everyone within your agency(s), leave the User Criteria section blank as it will default to show you everything for everyone within your agency(s).

The User Criteria section allows you to select the employees whose goals you wish to view. To select specific employees, click the **Users** button from the **Select Criteria** drop-down menu button**.** Click the arrow icon link that appears next to the drop-down menu.



A new window will open where you will search for the employee(s) you wish to view. To view all your employees, enter *your* last name in the **Manager's Last Name** field and click the **Search** button.



From the search results, click the **blue plus sign** by each employee whom you wish to view, then click the **Done** button**.** Please note, the **Done** button will only appear after you've made your selection. You will return to the **Goal Target Report** page 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 target progress of the employee's direct reports. This defaults to being checked so be sure to uncheck it if preferred.*

STEP 3. In the Advanced Filters section, locate the drop-down menu next to the Expectation Category. This automatically defaults to "All." You may then filter the expectations in the Excel spreadsheet. Alternatively, from the drop-down menu, click the expectation category for the goals you wish to view.

Note: Do <u>not</u> check the Inherited Goals checkbox. This defaults to unchecked; leave it as is**.**

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

Performance Review Report

Select this report to review an individual performance review. You can only view one employee at a time.

STEP 1. From the **Performance Review Report** page, within the Advanced Filters section, click the **Select Employee** button next to Employee Reviewed to search for a specific employee. Then select the Performance Review Task you wish to review for the desired performance program (EPRS or MassPerform) by clicking on the **Select Task** button.

Note: Read the task descriptions in the Search Tasks pop-up window to ensure you are selecting the correct task to display the entire performance review. For example, MassPerform Wrap Up simply appears as *FYXX MassPerform* and provides a summary of the entire year and final performance rating if one has been assigned.

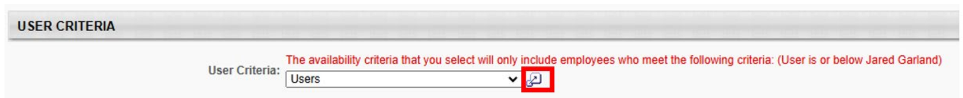
STEP 2. From the Output section, click the **Print Performance Review** link and a PDF report will download.

Performance Review Rating Report

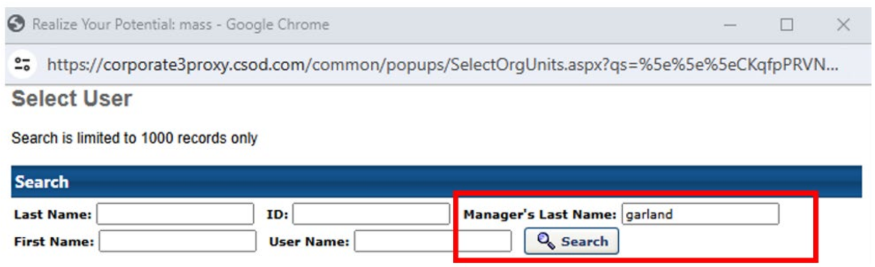
Select this report to review one or more employees' performance ratings.

STEP 1. From the **Performance Review Rating Report** page, within the User Criteria section, leave the User Criteria blank if you wish to view everyone within your agency(s).

To select specific employees, click the **Users** button from the **Select Criteria** drop-down menu button**.** Click the arrow icon link that appears next to the drop-down menu.



A new window will open where you will search for the employee(s) you wish to view. To view all your employees, enter *your* last name in the **Manager's Last Name** field and click the **Search** button.

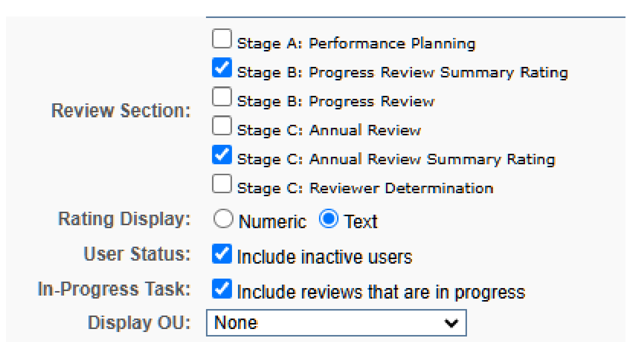


From the search results, click the **blue plus sign** by each employee whom you wish to view, then click the **Done** button**.** Please note, the **Done** button will only appear after you've made your selection. You will return to the **Performance Review Rating Report** page and see the names you selected in the User Criteria section. *Uncheck the* ***Include Subordinates*** *box if you do not wish to view the ratings of the employee's direct reports. This defaults to being checked so be sure to uncheck it if preferred.*

STEP 2. In the Advanced Filters section, select a Performance Review Task (EPRS or MassPerform).

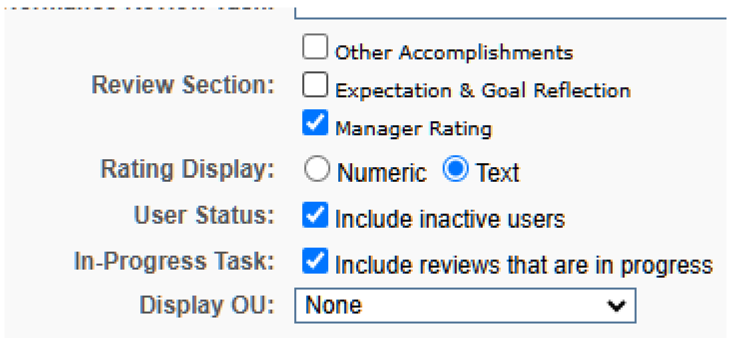
<u>If you selected an **EPRS** task, apply the following filter selections:</u>

- Review Section: Check **Stage B: Progress Review Summary Rating** and **Stage C: Annual Review Summary Rating** (leave others unchecked)
- Rating Display: Click **Text** radio button
- 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*



If you selected a **MassPerform** task, apply the following filter selections:

- Review Section: Check **Manager Rating** (leave others unchecked)
- Rating Display: Click the **Text** button
- 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*



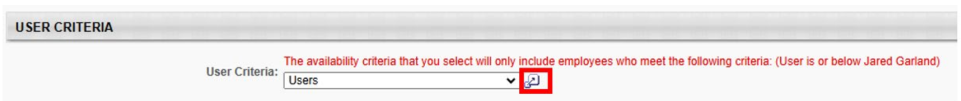
STEP 3. From the Output section, click the **Printable Version** link for a PDF format of the report, or click the **Export to Excel** link to view your results in spreadsheet format.

Performance Review Step Status Report

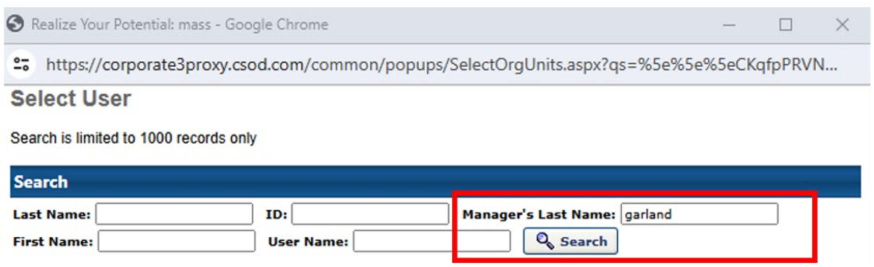
Select this report to view where one or more of your employee(s) review(s) are currently in the annual performance review cycle for either EPRS or MassPerform.

STEP 1. From the **Performance Review Step Status Report** page, within the User Criteria section, leave the User Criteria blank if you wish to view everyone within your agency(s).

To select specific employees, click the **Users** button from the **Select Criteria** drop-down menu button**.** Click the arrow icon link that appears next to the drop-down menu.

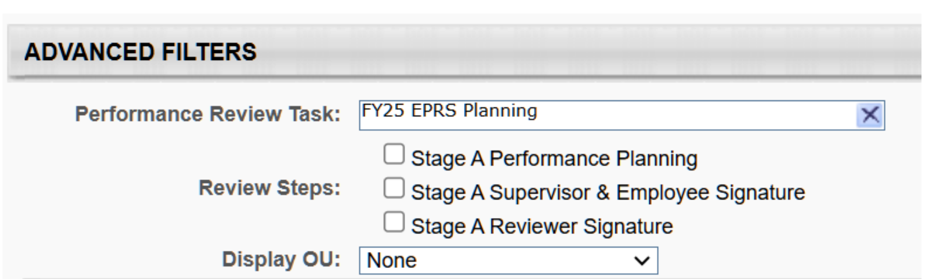


A new window will open where you will search for the employee(s) you wish to view. To view all your employees, enter *your* last name in the **Manager's Last Name** field and click the **Search** button.



From the search results, click the **blue plus sign** by each employee whom you wish to view, then click the **Done** button**.** Please note, the **Done** button will only appear after you've made your selection. You will return to the **Performance Review Step Status Report** page and see the names you selected in the User Criteria section. *Uncheck the **Include Subordinates** box if you do not wish to view the step status of the employee's direct reports. This defaults to being checked so be sure to uncheck it if preferred.*

STEP 2. From the Advanced Filters section, select which Performance Review Task you wish to review for the desired performance program (EPRS or MassPerform). A list of Review Steps will appear with checkboxes next to them that correspond to the steps within that task. Check the box next to each step you wish to review status details (e.g., MassPerform's Employee Enter Goals, EPRS' Stage A Performance Planning).



Note: Disregard the Display OU (organizational unit) drop-down menu options if you do not need additional report details. If you'd like to include additional information in your report such as division, position, etc., select that from the drop-down menu.

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.

Coordinator-Only Reports

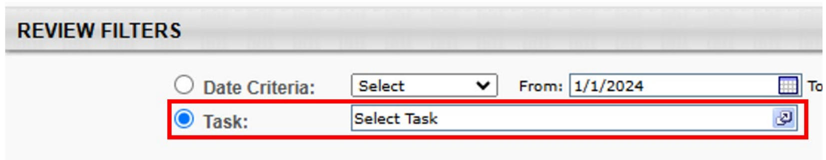
Bulk Performance Reviews

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

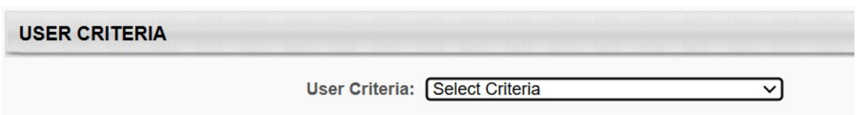
Please note: Depending on file size, the run time may take anywhere from a few minutes to a few hours. While loading, you may close your browser and check back later. This will not disrupt your report processing time.

STEP 1. From the **Bulk Performance Review Report** page, within the Review Filters section, click the **Task** radio button and then click the **Select Task** link which will open a new **Search Tasks** window. Click the relevant FY MassPerform or FY EPRS link for which you intend to print/download.

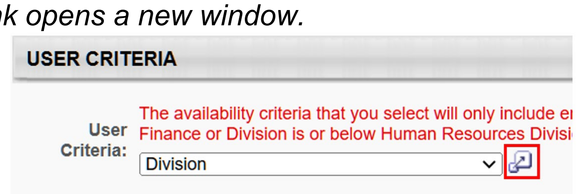
Note: You can only run this report for one task at a time. Repeat as necessary for additional tasks.



STEP 2. The next section is **User Criteria.** This section allows you to select the employees in your agency whose reviews you wish to view. To view all employees, click the **Select Criteria** drop-down menu button.



STEP 3. Click the **Division** button from the drop-down menu. Then, click the arrow icon link to the right of the drop-down menu. *This link opens a new window.*



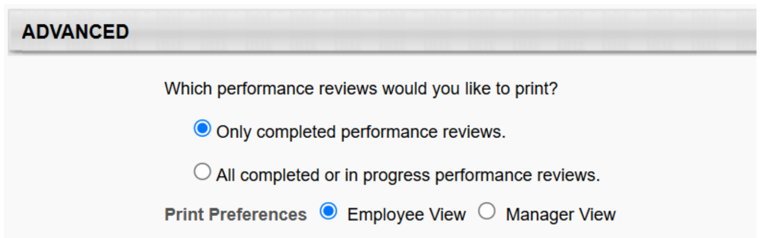
STEP 4. From the **Select Division** window that opens, click the **small black plus sign** to the left of your agency/secretariat where applicable. This will expand any departments you have access to within.

STEP 5. Once you've located the desired unit/department/agency/secretariat, select the **blue plus sign**. Click the **Done** button at the bottom of the window to save your selection.

STEP 6. Back on the **Bulk Performance Reviews** page, confirm that your respective division appears. Ensure that the **Include Subordinates** checkbox is selected. It is selected automatically by default.

STEP 7. In the Advanced section, choose which performance review you would like to print by selecting one of two radio buttons – 1) **Only completed performance reviews**, or 2) **All completed or in progress performance reviews**.

Click either the **Employee View** or **Manager View** radio buttons next to Print Preferences. These views are nearly identical, and it defaults to the Employee View.



STEP 8. In the Process Report section, optionally assign your report a title for easy record keeping, then click the **Process Report** link**.**

The report and its run status will appear below in the Processed Reports section. Once fully processed, a zip file icon will appear in the Output column. 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.

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 your browser and check back later. This will not disrupt your report processing time.

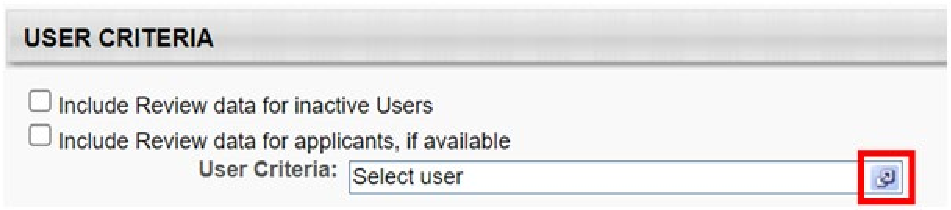
Performance Review Details Report

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

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

STEP 2. From the User Criteria section, if you would like to include inactive users, select the checkbox next to **Include Review Data for Inactive Users.** Please leave the Include Review Data for Applicants checkbox unchecked.

Click the arrow icon link to the right of the **Select User** drop-down menu. *This will open a new window.*



Enter the search criteria, then click the employee's name to return to the report's main screen.

STEP 3. In the Advanced Filters section, select the radio button next to either viewing performance reviews for which the completion date is equal to or contained within the date filters, or performance reviews for which the report date criteria overlap the performance review period.

STEP 4. In the Process Report section, optionally assign your report a title for easy record keeping, then click the **Process Report** link**.**

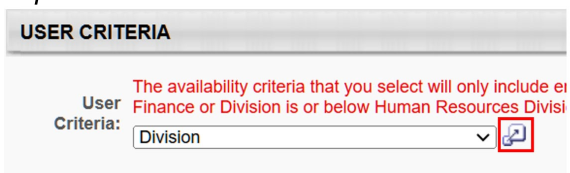
The report and its run status will appear in the Processed Reports section. Once the report is done processing, a PDF file icon appears in the **Output** Section. Click the PDF file icon and a download will begin. Select the downloaded file from the Output column to view the report.

Performance Review Status Distribution

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

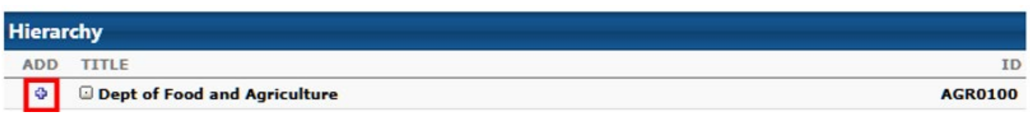
STEP 1. From the **Performance Review Status Distribution Report** page, the User Criteria section allows you to select the employees in your agency whose reviews you wish to view. To view all employees, click the **Select Criteria** drop-down menu button.

STEP 2. Click the **Division** button from the drop-down menu. Then, click the arrow icon link to the right of the drop-down menu. *This link opens a new window.*



STEP 3. From the **Select Division** window that opens, click the **small black plus sign** to the left of your agency/secretariat where applicable. This will expand any departments you have access to within.

STEP 4. Once you've located the desired unit/department/agency/secretariat, select the **blue plus sign**. Click the **Done** button at the bottom of the window to save your selection.



STEP 5. Back on the **Performance Review Status Distribution** page, confirm that your respective division appears, and ensure that the **Include Subordinates** checkbox is selected. It is selected automatically by default.

STEP 6. Under the Advanced Criteria section, select the Performance Review Task you wish to review for the desired performance program (EPRS or MassPerform) by clicking the blue arrow icon link.

Note: Read the task descriptions in the Search Tasks pop-up window to ensure you are selecting the correct task that includes ratings. For example, MassPerform Wrap Up simply appears as *FYXX MassPerform* and provides a final performance rating if one has been assigned.

STEP 7. Under the Advanced Criteria section, the Performance Review Data Set will default to **Manager.** Leave as is or select Department, Location, or Position from the drop-down menu.

STEP 8. Click the **Search** button. Below the Distribution of Ratings section, a bar graph/bell curve will appear. In the Employee Reviews section, all employees and ratings are listed (may appear on multiple pages).

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

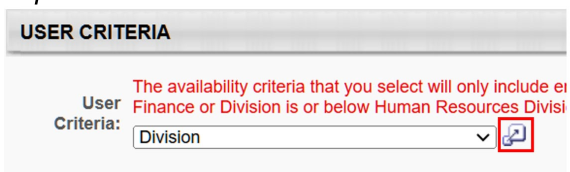
STEP 9. If desired, use the Excel or Printer icon buttons in the bottom right-hand corner of the Rating Distributions Chart to export the data to Excel or to print.

Task User Status

Use this report to view the performance progress of one or more users. This report will only show the completion progress for the entire task selected. If you wish to view the status of individual steps within a task (e.g., Employee Enter Goals, Stage A Performance Planning, etc.), use the Performance Review Step Status Report.

This report also allows you to review task completion across multiple tasks if desired. For instance, if you wish to review EPRS Stage A and MassPerform Kickoff completion in one spreadsheet, you may do so with this report.

STEP 1. From the **Task User Status Report** page, the User Filters section allows you to select the employees in your agency whose task status you wish to view. To view all employees in your agency, click the **Division** button from the drop-down menu. Then, click the arrow icon link to the right of the drop-down menu. *This link opens a new window.*



STEP 2. From the **Select Division** window that opens, click the **small black plus sign** to the left of your agency/secretariat where applicable. This will expand any departments you have access to within.

STEP 3. Once you've located the desired unit/department/agency/secretariat, select the **blue plus sign**. Click the **Done** button at the bottom of the window to save your selection.

STEP 4. Back on the **Task User Status Report** page, confirm that your respective division appears, and ensure that the **Include Subordinates** checkbox is selected. It is selected automatically by default.

STEP 5. Under the Advanced Filters section, select the arrow icon to the right of **Selected Tasks.**

The **Search Tasks** pop-up window will open. Select the desired performance program (EPRS or MassPerform) by clicking the blue plus sign next to the task name. You may select more than one performance task if desired.

Click the **Done** button when you are done adding tasks.

Note: Read the task descriptions to ensure you are selecting the correct task.

STEP 6. Back on the main report page, confirm that you see your selected tasks. If desired, check the **Include Task Completion Date** checkbox. Select either the **User** or **Task** radio buttons (the same data is displayed just in a different order).

STEP 7. Select an option for reviewing your results: Printable Version, Excel, or Export to Text.