Performance Planning Guide for Reviewer
Sections of the Performance Plan

- **Overview:** Describes the planning process and the workflow to complete the performance plan.

- **Goals &/Or Key Responsibilities:**
  - Performance Goals are outcomes or measurable objectives.
  - Key Responsibilities are job duties that are “key” or “essential” for the employee to focus on in the performance cycle.

- **Career Development:** The manager and employee establish a career growth and development plan.

- **Signatures:** After the plan has been reviewed, the manager will sign-off prior to the employee.
Initiating the Performance Plan, pg.1

1. Access the performance plan from Cornerstone at cornerstone.wm.edu.

2. Login using your W&M network username and password.

3. Click on “My Tasks” from your Welcome Page.

4. On the Review Summary page, click on the “Complete Indirect Manager Review of employee name”.

5. The Overview page provides an introduction of the process & steps involved in the performance plan.
6. View performance goals for the employee to accomplish during this performance period.

7. View key responsibilities for the employee to focus on during this performance period.

8. View input provided on the Career Development section.

9. Sign to approve the performance plan (you can add comments on the Signature Page)

10. Submit the performance plan.
The Performance Plan is accessed from the “My Tasks” button
Performance Review Summary

Click on the link to Complete Indirect Manager Review of “employee’s Name”
The fifth step is for the reviewer to view, approve and sign the employee’s performance plan.
Overview

At the beginning of the performance cycle, the employee and supervisor will together develop the Performance Plan for the new performance period. The Performance Plan consists of two sections:

1. Goals and/or Key Responsibilities
2. Career Development

The workflow for completing the Performance Plan is pictured below in the Review Step Progression. The 1st step begins with the manager providing input on goals and/or key responsibilities for the employee for the current performance cycle. The 2nd step allows the employee an opportunity to provide input and ideas for their Performance Plan. The 3rd step provides the manager and employee an opportunity to meet to review the Performance Plan. The manager will be able to sign the plan by typing their name in the Sign-off section. The final step allows the employee the opportunity to sign the plan by typing their name in the Sign-off section. The completed Performance Plan is available to the employee and manager from the Performance option located in the top menu bar under "Goals". To begin completing your portion of the Performance Plan, scroll to the bottom of the screen and click on the “Get Started” button.

Click “Get Started” to begin
Goals &/or Key Responsibilities

The Reviewer may view the Performance Plan and can add comments on the Signature page.

Please evaluate the employee's achievement of performance goals and/or key responsibilities identified in their performance plan. When assessing performance, please consider whether he/she identified meaningful goals, modified his/her goals to meet changing needs, pursued training and development opportunities or made sufficient progress toward achievement of his/her performance goals.

Note that comments in this section should be more detailed for ratings of Under-Performer or Exceptional Performer.

Click on “Save and Continue”
Together the manager and employee may establish a career growth and development plan. The plan may include some or all of the following:

- action steps to help develop new skills and/or knowledge
- action steps to help reach performance goals or achieve key job responsibilities
- training opportunities to enhance career growth and development

Identify action steps to help employee develop new skills and/or knowledge.

Identify action steps to help employee reach performance goals or achieve key job responsibilities.

What training opportunities should be explored to enhance career growth and development?

Click on “Save and Continue”
Sign-off

1. Once you have viewed and approved the Performance Plan, you can sign and submit it (see next slide).

2. The Performance Plan is considered completed after you have submitted the plan.
Signature Page

Signatures

**Manager or Supervisor’s Signature:** By signing this form, you confirm that the performance evaluation reflects performance during the performance year.

**Reviewer’s Signature:** By signing this form, you confirm your review and approval of the performance evaluation.

**Employee’s Signature:** By signing this form, you confirm that you have discussed this performance evaluation with your supervisor. Signing does not necessarily indicate that you agree with this evaluation. You can provide any additional comments below.

**Reviewer**
- First and last name
- Sign

**Manager and employee’s signatures**

Reviewer can add comments in this text box.

Click on “Submit”
1. You can return to the Plan or if you are ready to submit your portion of the Performance Plan, simply click on the “Submit” button.

2. You can log out of Cornerstone or complete other actions by clicking on the “Go to Action Items” button.
Additional Questions

If you have questions please contact the Office of Human Resources

– askHR@wm.edu
– Mane Pada at mepada@wm.edu

Thank You