Supervisor/Manager

1. Go to Performance Management website: cornerstone.wm.edu

2. Log in using your W&M network credentials

3. On the Welcome Page, click on the My Tasks box.
Supervisors/Managers

3b. Or, Click on Performance on the menu bar

and select Performance Reviews from the drop-down menu

4. If you don’t see your list of reviews, click on the box “Show completed and expired tasks” and your list will appear. Click on a link to start part of the review process.

Questions? askHR@wm.edu
5. Read the Overview information and then click **Get Started**.
6a. Complete the Core Competencies part of the assessment

Select a rating

Employee’s rating and comments

Add comments

Instructions for completing this section:
1. Select an achievement level for each competency. Note: The achievement levels reflect the current definition followed with the definition for the 2016/17 performance year. For example: Satisfactory/Solid Performer
2. Add supporting comments for the achievement level selected in the comment box.
6b. Note the changing language of the ratings. An explanation of each rating and what distinguishes it from the other ratings is provided. Just click on the question mark icon.

**TIP:** Note that our ratings are changing to updated terms.
7. When you are done with the Core Competencies section, click **Save and Continue**.

Note that you also have the options of going back to a previous section by clicking on the **Back** button. Or, if you need to stop and come back to the evaluation at a later time, you can click on **Save and Exit**.
8. Next, complete the Development/Learning Goals or Achievements section. You will be able to read your employee’s comments about strengths and areas of improvement. Enter your information and then click **Save and Continue**.
9. **This Year (2016)** – You will have to type in the Core Job Responsibilities. Next year, they will auto-populate the form since the information will be in the system.

- Three (3) **Primary and Essential** core job responsibilities are required to be entered.
- Three additional spaces are provided to record additional primary and essential core job responsibilities.
- **Note**: the list is not comprehensive of all the duties, but only a listing of those responsibilities that are primary and essential.

9a. First, in this text box, you will record and describe a primary or essential job responsibility.
9b. Second, use the drop-down menu to select a rating for each Core Job Responsibility.

9c. Third, in this text box, you will type supporting comments for the achievement level or rating.

Continue completing all three sections for each Core Job Responsibility. When you are finished listing and evaluating all of the core job responsibilities of the employee, click **Save and Continue**.

Note that you will continue to have the option to go back to a previous screen, or to save and exit if you need to stop and finish the review at a later time.
Supervisors/Managers

10. After reading the Employee Comments (if any are listed), click **Save and Continue**
11. Comments for the Reviewer can be entered in the box at the bottom of the form. Comments are optional and not required. When you are finished typing your comments, click **Save and Continue**.

Do not hit Submit quite yet. You’ll want to review the Summary page, which is the next screen.

**Note:** the Reviewer might send the review back for edits or changes. Instructions for this situation are included on this page.
12. Review the Summary page. If everything is correct, click **Submit** to send it to the Reviewer. Click the **Back** button to make changes.
13. A pop-up window will appear verifying that you want to submit your evaluation to the Reviewer. Once you click on Submit, no other changes can be made. The Reviewer will have the option of sending back to you so that you can make changes, but you cannot complete this action yourself.

14a. Option – If you have more than one review to complete, you can click on the Go to Action Items button. It will take you back to your Task List and you can select another review.
14b. If you are finished with all of your reviews, you can log out of the system. Locate the gear icon in the upper right corner of the screen. Click on it and select Log Out from the drop-down menu.
Reviewer has **No** feedback:

- An e-mail will indicate that the review is available to both you and the employee
- Schedule a time to discuss the review with your employee
- Both you and the employee need to electronically sign the review
- Click on submit when you are done

Reviewer **Has** feedback:

- An e-mail will alert you that the review is available to you
- You will be able to reopen the evaluation and see the Reviewer’s comments (examples on p.17-18)
- You can make changes and resubmit the review to the Reviewer.
- Once you are both satisfied, follow the steps listed in the left column.
16. Once you have discussed the performance evaluation with the employee, the Signature page will become available. A text box will open for you to type in your name. The date will auto populate with the current date.

If the employee wants to sign the review at the same meeting. You will have to open up a separate web browser, and allow the employee to log into the system to sign. For example, if you are viewing the evaluation in Google Chrome, open Firefox for the employee to log in.

Note: There is a comment field available if the reviewer wants to write a comment that the employee can see.
Supervisor/Manager

Example of notification that Reviewer has edits or changes.
Example of Reviewer comments/suggestions page.

**Reviewer Feedback**

**Instructions for Providing Feedback**

Manager/Supervisor Instructions: The Reviewer will be able to Reopen the evaluation and return the performance evaluation to you with comments. After review and consideration of the Reviewer’s feedback, you will be able to edit and resubmit the performance evaluation to the Reviewer for approval. A comment section is available for you to provide information for the Reviewer.

Reviewer Instructions: If you do not have feedback for the Manager or Supervisor, scroll to the bottom of this page to move to the next section.

If you have feedback, the comment section is provided for suggestions or comments for the manager or supervisor to consider.

1. Provide comments to the manager or supervisor in the section provided.
2. Select the Overview section from the left-hand menu.
3. Scroll to the bottom of the screen to select “Reopen Step”.
4. A window will open allowing you to choose to reopen the evaluation to the Manager.
5. Indicate any additional comments (optional) and choose “Save”.
6. The manager or supervisor will be notified by email that you have reopened the evaluation to them. After review of your comments, the manager or supervisor can adjust the evaluation and submit it to you for your review and approval.

**Comments or Suggestions for Manager/Supervisor to consider**

Please add a comment about the additional work on my special project.

**To be completed by Manager/Supervisor:** Provide any additional comments for the Reviewer

Comments: [Text editing interface]