2019 ANNUAL REVIEW
MANAGER USER GUIDE

Access Cornerstone

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OVERVIEW

The current performance management implementation is for all salaried employees and will be conducted in Cornerstone (Faculty are not included).

The 2019 performance review will launch on April 10, 2019. This year we are combining the evaluation and the plan into one streamlined form. The evaluation assesses the previous cycle’s goals (backwards looking) and the plan records the goals for the upcoming cycle (forward looking).

Employees hired on or before 2/1/2019 are included in this implementation.

Operational and Professional Employees

You have until June 28, 2019 to complete the review (evaluation and plan).

Classified Employees

You must complete the evaluation by April 27, 2019 (per DHRM requirement). You have until June 28, 2019 to complete the plan.

STEPS AND DEADLINES:

STEP 1: Self-assessment

This step opens on April 10 and closes on April 19

Complete the following sections:

1. Achievement of goals
2. Employee Comments
3. Employee Suggestions/Feedback on upcoming goals

STEP 2: Manager Completion

Managers will receive an email from Cornerstone either upon completion of the self-assessment or on April 20. This step closes on May 24.

Complete the following sections:

1. Achievement of goals (view only)
2. Employee Comments (view only)
3. Employee Suggestions/Feedback on upcoming goals (view only)
5. Goals and/or Key Responsibilities 2019 (upcoming cycle’s goals)
6. Career Development 2019
7. Supervisor Comments
STEP 3: Reviewer Approval

Approvers will receive an email from Cornerstone upon the manager’s completion. This step closes on June 7.

Complete the following sections:

1. Achievement of goals (view only)
2. Employee Comments (view only)
3. Employee Suggestions/Feedback on upcoming goals (view only)
4. Achievement of Goals (5/1/2018-4/30/2019; view only)
5. Goals and/or Key Responsibilities 2019 (upcoming cycle’s goals; view only)
6. Career Development 2019 (view only)
7. Supervisor Comments (view only)
8. Reviewer Signature – **Approver must provide a signature and submit the review**

STEP 4: Manager/Employee discussion and Manager Sign-off

Managers will receive an email from Cornerstone upon the reviewer's approval. This step closes on June 19.

Employees and managers will have an opportunity to open and read the review before the discussion — managers need to schedule this meeting. Managers can edit the review before sign-off.

**Managers must sign the review by JUNE 19** for this year’s ratings of your employee(s) to be considered for a possible merit increase.

Complete the following sections:

1. Achievement of goals (view only)
2. Employee Comments (view only)
3. Employee Suggestions/Feedback on upcoming goals (view only)
5. Goals and/or Key Responsibilities 2019 (upcoming cycle’s goals)
6. Career Development 2019
7. Supervisor Comments
8. Reviewer Signature
9. Manager Signature – **Manager must provide a signature and submit the review**

STEP 5: Employee Sign-off

Employee will receive an email from Cornerstone upon completion of the previous step. This step closes on June 28. Completion of this step will allow your goals to auto-populate next year’s evaluation.

Complete the following sections:

1. Achievement of goals (view only)
2. Employee Comments (view only)
3. Employee Suggestions/Feedback on upcoming goals (view only)
4. Achievement of Goals (5/1/2018-4/30/2019; view only)
5. Goals and/or Key Responsibilities 2019 (upcoming cycle’s goals; view only)
Employee can decline to sign. Appeal process is conducted off line directly with HR.

**IMPORTANT:** All steps (1-5) must be completed to finalize the process. Without the employee's signature the process will not be completed.

**STEP-BY-STEP INSTRUCTIONS: MANAGER’S INSTRUCTIONS**

Managers/Supervisors will receive an email from askHR@wm.edu similar to this one:

Dear REVIEWER.FIRST.NAME,

The REVIEW.STEP.TITLE for REVIEWEE.FIRST.NAME REVIEWEE.LAST.NAME is now available for you to complete in Cornerstone.

1. Log in to Cornerstone using your WMuser ID and password.
2. Click on "My Tasks" on the Welcome Page to access the performance task.
3. Click on the REVIEW.STEP.TITLE link (see note below).
4. Complete your REVIEW.STEP.TITLE no later than REVIEW.STEP.DUE.DATE.

Once you complete this section, the REVIEW.TASK.TITLE will be routed to the next step in the process. The Performance Review steps are:

1. Self Assessment
2. Manager Completion
3. Reviewer Approval
4. Manager and Employee Discussion; Manager Signature
5. Employee Signature (Review is not complete until all steps are completed)

**Note** - If you do not see your task(s), click on the "Show completed and expired tasks" button.

For more details and information, please go to the Performance Management web page, or contact askhr@wm.edu.

Thank you,

Human Resources
When you click on the employee’s review, you will land on the OVERVIEW page.

Please Read the instructions and click on Get Started

Manager Completion - Please complete the following sections:

1. Achievement of goals (view only)
2. Employee Comments (view only)
3. Employee Suggestions/Feedback on upcoming goals (view only)
5. Goals and/or Key Responsibilities 2019 (upcoming cycle’s goals)
6. Career Development 2019
7. Supervisor Comments
Manager Completion instructions:

Overview

Performance Review for Professionals
The performance evaluation should reflect the performance during the entire performance year of May 1, 2018, through April 30, 2019.

Employee: Communicate your achievements and progress toward goals in the past performance cycle. You may also suggest goals for next year.

Supervisors/Managers: Review and evaluate all documentation from the performance year including notes, interim evaluations and any other documentation related to the employee's performance or behavior. Provide input on goals and/or key responsibilities for the employee for the May 1, 2019, through April 30, 2020 performance cycle.

Reviewer: Review and approve the review before the manager and the employee meet to discuss it. You may consult with the supervisor to clarify any questions about the review.

To get started completing the review, scroll down to the bottom of the screen and click the Get Started button.

The Performance Evaluation section consists of one core section:
- Achievement of Goals

The Performance Planning section consists of two core sections:
- Goals and/or Key Responsibilities
- Career Development
First section: Achievement of Goals (5/1/2018-4/30/2019)

Note: These ratings will be considered towards the merit increase for Classified employees and "if offered" for Operational and Professional Faculty employees

This section includes the employee’s ratings and comments (if one was completed)

When finished reviewing and rating the goals, click on Save and Continue to move to the next section
Second section: Employee Comments (view only)

When finished viewing comments, click on Save and Continue to move to the next section

Employee Comments

Comments, suggestions or information you would like considered in addition to your self assessment can be provided below.

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have a few comments</td>
</tr>
</tbody>
</table>

Third section: Employee Suggestions/Feedback on upcoming Goals (view only)

When finished viewing the employee’s suggestions/feedback, click on Save and Continue to move to the next section

Employee Suggestions/Feedback on Upcoming Goals

Use this space to provide your supervisor with suggestions for upcoming goals.

<table>
<thead>
<tr>
<th>Comments or Suggestions for Manager/Supervisor to consider</th>
</tr>
</thead>
</table>

Back  Save and Exit  Save and Continue
Fourth section: Goals and/or Key Responsibilities (goals for the upcoming cycle)

Note: These goals will auto-populate next year’s performance review

When finished entering the goals, click on Save and Continue to move to the next section

Goals and/or Key Responsibilities 2019

**Performance Goals:** Goals are outcomes or measurable objectives to be accomplished during a specific time frame. Goals can serve as an effective tool to employees in understanding what is expected of them and where to focus their priorities. A performance goal is a desired result or possible outcome that an employee plans and commits to achieve. Performance goals can include any plan or commitment that might be:

- A short-term objective for a specific job duty or task.
- A job-oriented expectation or priority.
- Focused on a special project.
- An important result the employee is working to achieve.

**Key Responsibilities:** Job duties that are “key” or “essential” for the employee to focus on in the current performance cycle. Not all job duties or responsibilities are of the same relative importance. In lieu of a performance goal or objective, identify key or essential performance factors that will define what success looks like in the job in the current performance cycle.

**Instructions for adding either a Goal or Key Responsibility:**

1. Click the button located in the upper right area of the form titled "Add Goal and/or Key Responsibility".
2. Add a title and a description for the Goal or Key Responsibility.
3. Add a weight (must add up to 100%).
4. Include a goal with a weighting of at least 5%. Provides: "Employee complies with all university policy requirements, such as time sheet submission or approval, procurement procedures, performance management responsibilities, I-9 compliance, and attendance at or completion of required trainings."
5. Add a task that relates to the Goal or Key Responsibility (optional).
6. Add and attachment (up to three) to support the Goal or Key Responsibility (optional).

- The calendar date reflects the end of the performance cycle.
- Clicking on the **drop-down menu** to the right of the goal offers the option to edit, delete, and view history.
- Clicking on the **edit option** offers the option to edit, add tasks, upload attachments and add comments.
- Scroll to the bottom, select button "Save and Continue" when you are ready to move to next section.

Total Weight: 0%
Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.
ENTERING THE GOALS:

1. Click on the **Add Core Responsibility/Performance Goal button** (top right side of the screen)

![Add Core Responsibility/Performance Goal button]

2. This window below will show up. Enter the required information and click **Save**. Continue adding goals by following steps 1 and 2.

![Create Core Responsibility/Performance Goal form]
When finished entering the goals, click on **Save and Continue** to move to the next section

**Service Awards**

**New – Please Review**

Will coordinate this employee event

**Due Date:** 4/30/2020

**Comments:**

Supervisor can add additional comments here.

Total Weight: 100%
Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.
Fifth section: Career Development

NOTE: This section is not rated

When finished, click on Save and Continue to move to the next section

Career Development 2019

Based on the previous step, "Goals and/or Key Responsibilities," please outline the steps necessary to accomplish upcoming goals.

• Action steps to help develop new skills and/or knowledge.
• Action steps to help reach performance goals or achieve key job responsibilities.
• Learning opportunities to enhance career growth and development.

Note: If no steps or opportunities were identified, comments are not necessary.

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

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

Comments:
Sixth section: Supervisor Comments

When finished, click on Save and Continue to move to the next section (Summary page)

Seventh section: Summary Page (view only)

On the Summary Page you can view the employee and the manager’s ratings.

When finished viewing this page click on Submit or if you need to make any changes, you can click on the Back button
After you click the **Submit** button, this window will show up. Click **Submit** again

You should see 100% completion of the Self-Assessment step

**The Options button (top right side of your screen)**
By clicking on the black drop-down arrow, you can:
- Attach files and documents
- Print the review
- Add a co-planner
WHAT HAPPENS NEXT?

The following steps need to take place:

1. Self – assessment ~ **completed**
2. Manager completion ~ **completed**
3. Reviewer approval
4. Manager and employee discussion
5. Manager’s signs and submits the review
6. Employee signs and submits the review

The review will not be finalized until ALL steps (1 – 6) are completed.

If you have questions or concerns about Cornerstone or the review process, please send them to askHR@wm.edu