2019 ANNUAL REVIEW

REVIEWER/APPROVER USER GUIDE

Access Cornerstone

OVERVIEW

STEPS AND DEADLINES

REVIEWER/APPROVER INSTRUCTIONS
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: REVIEWER/APPROVER’S INSTRUCTIONS**

Reviewers/Approvers 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.

Reviewer Approval - 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)
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
The step you are about to complete is indicated by a check mark next to it. You can determine if the Self Review (optional) and the Manager Completion steps have been completed if the circle next to that step is filled.

**Reviewer/Approver 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 (View only)

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

When finished reviewing and rating the goals, click on Save and Continue to move to the next section.

Achievement of Goals

This section allows you to review goals and/or key responsibilities that were defined in Cornerstone during the previous cycle.

Performance Goals: Goals are outcomes or measurable objectives to be accomplished during a specific time frame.

Key Responsibilities: Job duties that are “key” or “essential” for the employee to focus on in the current performance cycle. In lieu of a performance goal or objective, key or essential performance factors were identified.

Instructions for completing this section:
- The due date cannot be modified.
- The weight was established during the previous performance planning cycle. If necessary, managers may adjust the weight.
- Select a rating (click on the “?” for rating definitions)
- Add supporting comments and notes in the text box.
- Once you have completed the steps above, click on save and continue.

Cornerstone Performance & Learning Administration

Provide primary support as the Cornerstone Performance Admin and provide secondary support as the Cornerstone Learning back-up Admin.

Due Date: 4/30/2019

Weight: 30%

Supervisor's comments 1

I adhered to our University Values

University Values

William & Mary values respect, dedication, communication, relationship-building, and leadership.

Due Date: 4/30/2019

Weight: 5%

Supervisor's comments 5

I adhered to our University Values
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.

| Comments or Suggestions for Manager/Supervisor to consider |

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

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

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

more...


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 (view only)

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.

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?
Sixth section: Supervisor Comments (view only)

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

Supervisor Comments

Please provide any additional comments about the employee’s strengths or weaknesses that have not been addressed above. In addition, if a performance plan was not previously completed in Cornerstone for this evaluation period, you must use this section to add supporting comments about the employee’s key responsibilities to evaluate the employee’s performance during the 2017-2018 cycle.

Note: This section will not be rated.

Make sure to complete the Performance Plan for the 2018-2019 cycle - already available to you via Cornerstone. These goals and/or key responsibilities will auto-populate into next year's evaluation.

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 NEXT

Summary

Overall Rating 😊 Solid Performer

<table>
<thead>
<tr>
<th></th>
<th>Self Review</th>
<th>Manager Review</th>
<th>Manager/Employee Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement of Goals</td>
<td>3.6/5.0</td>
<td>3.2/5.0</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Advanced Performer</td>
<td>Solid Performer</td>
<td>-</td>
</tr>
<tr>
<td>Employee Comments</td>
<td>N/A</td>
<td>N/A</td>
<td>-</td>
</tr>
<tr>
<td>Employee Suggestions/Feedback on Upcoming Goals</td>
<td>N/A</td>
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<td>Solid Performer</td>
<td>-</td>
</tr>
</tbody>
</table>
Eighth section: Signature Page

Please type your name in the Reviewer’s text box, click the Sign button.
When finished signing, click on Submit.

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.

Employee Pending Signature

Manager or Supervisor Pending Signature

Reviewer

First and last name Sign

Comment

B I U S Encoder

Submit Save and Exit Back
After you click the **Submit** button, this window will show up. Click **Submit** again.

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

**Employee Instructions**: Thank you for completing your self-assessment. You may log out by clicking on the "gear" icon located in the upper right corner of the screen.

**Manager or Reviewer Instructions**: Thank you for completing the review. If you have other actions to complete, click on the "Go to Action Items" button below. If you have no other actions to complete, you may log out by clicking on the "gear" icon located in the upper right corner of the screen.

**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 ~ **completed**
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