Cornerstone
realize your potential

2019 ANNUAL REVIEW

EMPLOYEE USER GUIDE

Access Cornerstone

OVERVIEW
STEPS AND DEADLINES
SELF-ASSESSMENT 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)
4. Achievement of Goals (5/1/2018-4/30/2019)
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)
4. Achievement of Goals (5/1/2018-4/30/2019)
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)
6. Career Development 2019 (view only)
7. Supervisor Comments (view only)
8. Reviewer Signature (view only)
9. Manager Signature (view only)
10. Employee Signature & Comments text box – **Employee must provide a signature and submit the review**

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: SELF-ASSESSMENT INSTRUCTIONS

The employee will receive an email from askHR@wm.edu similar to this one:

Dear YOUR NAME,

The Self Review step of your 2019 Performance Review 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 Self Review link (see note below).
4. Complete your Self Review no later than 4/19/2019.

Once you complete this section, the Working Draft - 2019 Performance Review 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

WILLIAM & MARY
CHARTERED 1693

When you click on your task, you will land on the OVERVIEW page
Please Read the instructions and click on Get Started

2019 Performance Review

Options ▼

0%

- 🏠 Overview
- ✓ Achievement of Goals
- ✓ Employee Comments
- ✓ Employee Suggestion…
- ✓ Summary
- ○ Goals and/or Key Res…
- ○ Career Development …
- ○ Supervisor Comments
- ○ Signatures

REVIEW SECTIONS

REVIEW STEPS

Overview

Performance Review

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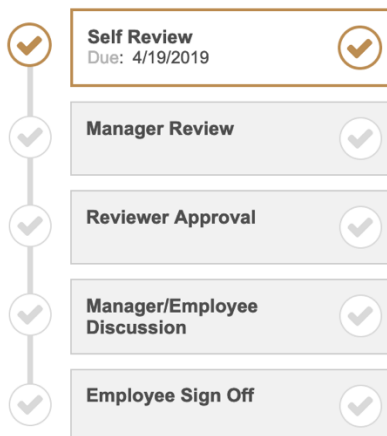
The Performance Evaluation section consists of one core section:
- Achievement of Goals

The Performance Planning section consists of two core sections:
- Goals and/or Key Responsibilities
- Career Development

Review Step Progression

- ✓ **Self Review** ✓
  Due: 4/19/2019
- ✓ **Manager Review** ✓
- ✓ **Reviewer Approval** ✓
- ✓ **Manager/Employee Discussion** ✓
- ✓ **Employee Sign Off** ✓

Get Started

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

The step you are about to complete is indicated by a check mark next to it.

Review Step Progression

- ✔ **Self Review**
  Due: 4/19/2019 ✔

- ✔ **Manager Review** ✔

- ✔ **Reviewer Approval** ✔

- ✔ **Manager/Employee Discussion** ✔

- ✔ **Employee Sign Off** ✔
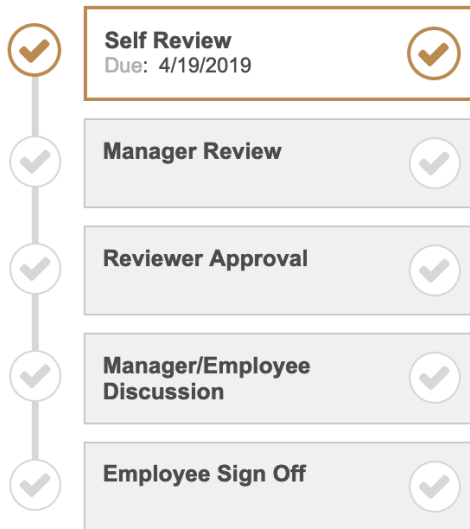
Get Started

Self-Assessment instructions:

Overview

Performance Review for Professionals

The performa   ne 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

NOTE: You may add additional comments in the text box.

When finished reviewing and rating your 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.

University Values

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

Due Date: 4/30/2019

more...

Weight: 5 %

Solid Performer ▾ ❓ *

Comments:

| B | I | U | S | x₂ | x² | Iₓ | | ☰ | ☷ | | | ☰ | ☰ | ☰ | ☰ | | Font | ▾ | | Size | ▾ | | A▾ | A▾ |

| ABC | ↰ | ↱ | | ✂ | ☐ | ☐ | ☐ | ☐ | | ☐ | ☐ |

Back   Save and Exit   **Save and Continue**

Second section: Employee Comments

When finished entering 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.

Comments

| B | I | U | S | I×̲ | | ½≡ | ≔ | ⇤ | ⇥ | | ABC |

Back   Save and Exit   Save and Continue

Third section: Employee Suggestions/Feedback on upcoming Goals

When finished entering your suggestions/feedback, click on **Save and Continue** to move to the next section (the Summary page)

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

| B | I | U | S | I×̲ | | ½≡ | ≔ | ⇤ | ⇥ | | ABC |

Back   Save and Exit   Save and Continue   Submit

Fourth section: Summary Page (view only)

On the Summary Page you can view your self-rating
When finished viewing your rating click on **Submit** or if you need to make any changes, you can click on the
Back button

Summary

	Self Review	Manager Review	Manager/Employee Discussion
Achievement of Goals	**3.6**/5.0 Advanced Performer	-	-
Employee Comments	N/A	-	-
Employee Suggestions/Feedback on Upcoming Goals	N/A	-	-
Goals and/or Key Responsibilities 2019	-	-	-
Career Development 2019	-	-	-
Supervisor Comments	-	-	-
Overall ❓	**3.6**/5.0 Advanced Performer		

Back   Submit

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

Submit Review   ✕

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel   Submit

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

2019 Performance Review

Options ▾

100%

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.

Go to Action Items

The Options button (top right side of your screen)
By clicking on the black drop-down arrow, you can:
- Attach files and documents
  - Print your review

Options ▾

Attachments

Employee Details

View Feedback

Print Review

Print Reviewee Version

WHAT HAPPENS NEXT?

The following steps need to take place:

1. Self – assessment **~ completed**
2. Manager completion
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