University of Colorado
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EMPLOYEE SERVICES

Performance Management: Step-by-Step Guide

Performance Management Using Cornerstone

System Administration is offering an online performance management system, called Cornerstone, to better support our efforts towards improving talent management.

Using this system, we hope to:

- Move away from the manual paper process.
- Facilitate more frequent and meaningful conversations between employees and supervisors about goal alignment, performance, and employee development.
- Ensure performance ratings are based on a defined performance plan with goals.
- Align goals with department goals or hierarchy.
- Provide single sign-on through the employee portal, which lets users access the system at any time to create tasks, update tasks, and record goal completion.

This guide describes how to use Cornerstone to set goals and manage performance planning.

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Performance Cycle Activities and Deadlines

During the performance cycle, employees participate in the following activities:

- Goal and Performance Planning
- Mid-year Review
- Final Evaluation

Note: Your goals should be submitted and approved in Cornerstone by **Tuesday, April 9, 2019**.

Getting Started

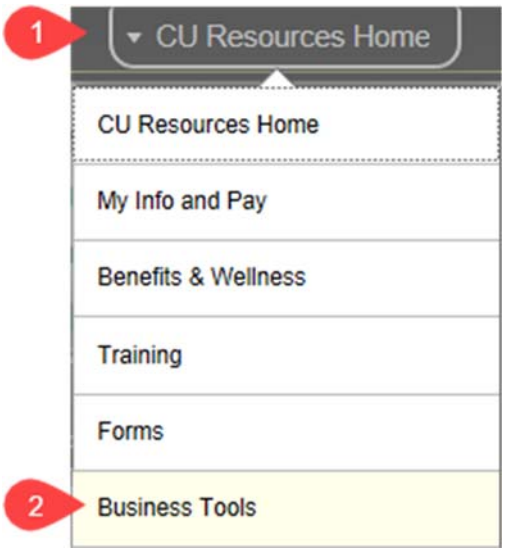
Establishing individual employee goals and aligning them with your department goals not only enhances performance, but also builds collaborative relationships between employees, teams, and their supervisors that are focused on using dialogue and feedback as developmental tools.

At the beginning of each performance cycle, employees and supervisors are responsible for developing goals. The employee is responsible for entering individual employee goals in Cornerstone. Goals can be modified throughout the plan cycle based on the changing needs of the employee and department. All goals, updates, and comments will be gathered into the end-of-year Final Evaluation.

Logging Into Cornerstone

You can access Cornerstone from the employee portal, https://my.cu.edu/.

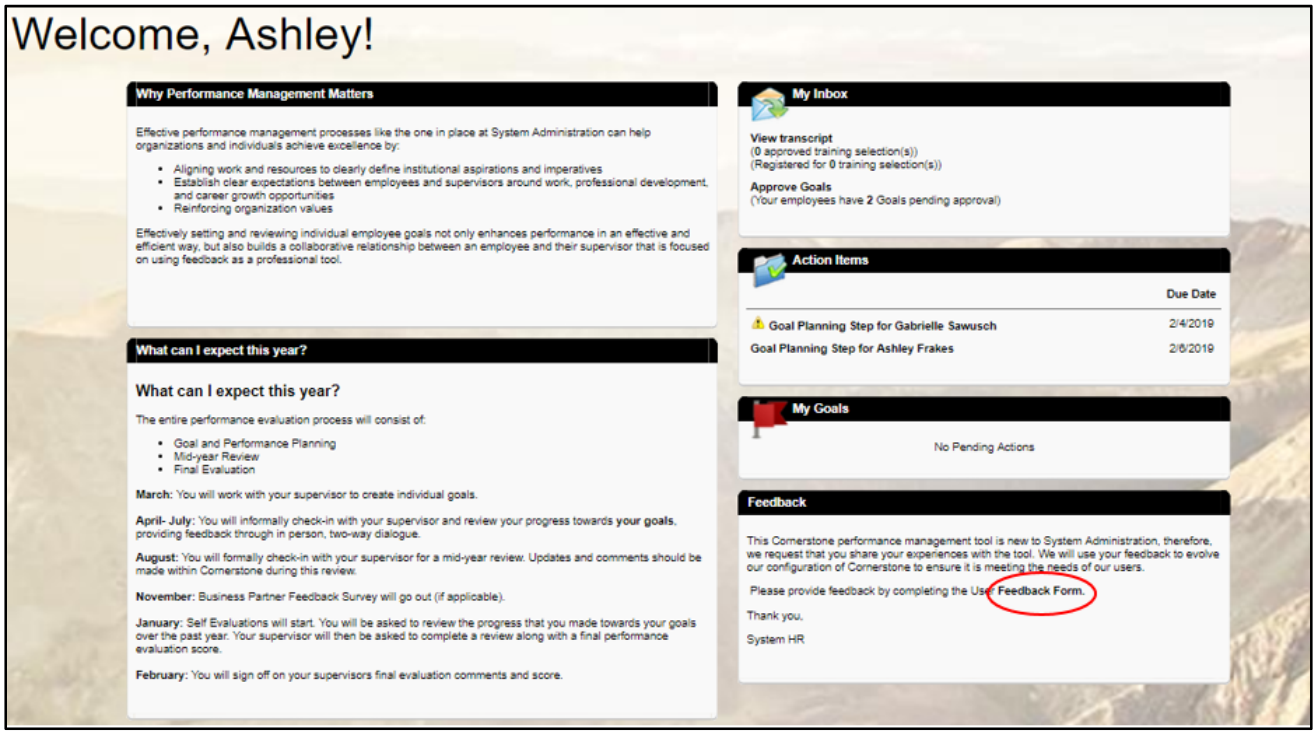
1. From the Employee Portal, click the **CU Resources Home** drop-down.
2. Select **Business Tools**.



3. Click the **Cornerstone** tile.



Cornerstone opens in a new browser window and displays the Welcome page.



From the Welcome page you can review details regarding performance management, including process and timeline.

You will also see Action Items associated with performance cycle activities, described later in this guide.

System HR welcomes your feedback. Click the **Feedback Form** link (circled above) to send any recommendations and suggestions to System HR.

Working with Goals

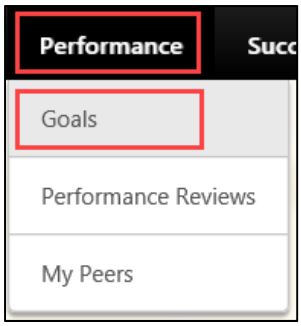
Employees and supervisors should collaborate on defining performance goals.

Every employee using Cornerstone will create and submit goals. Supervisors can review submitted goals either approve or deny them.

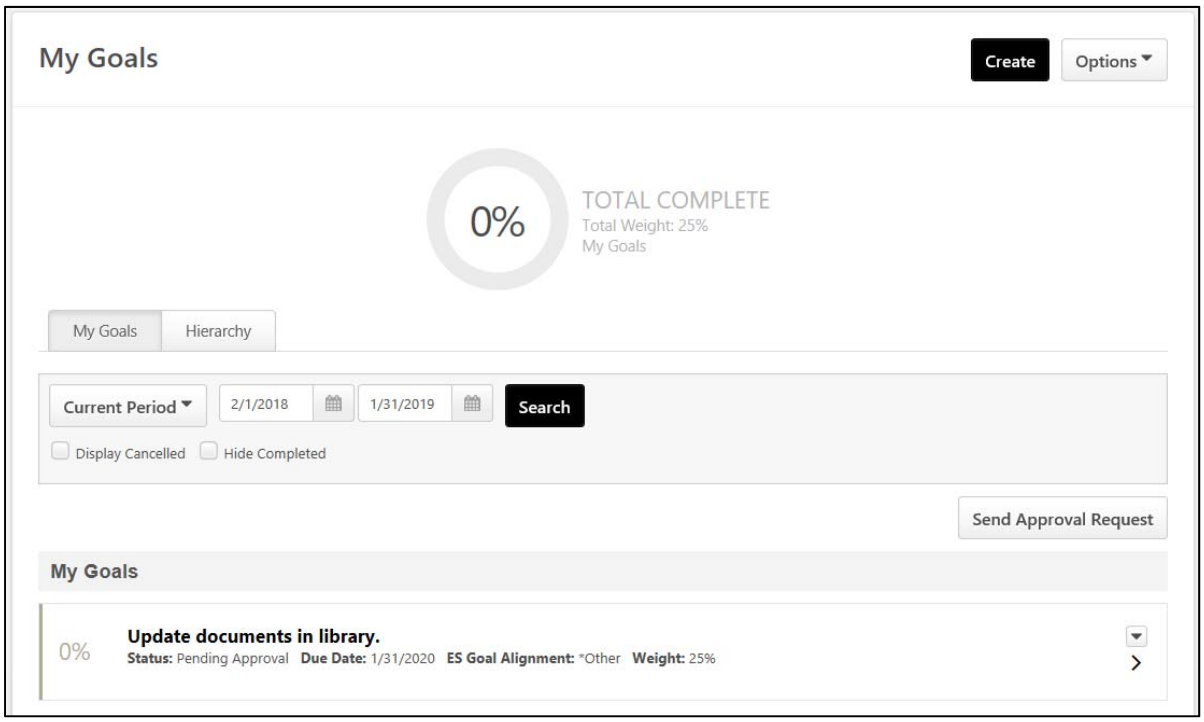
Creating a Goal

To create a goal:

1. From the **Performance** menu, click **Goals**.

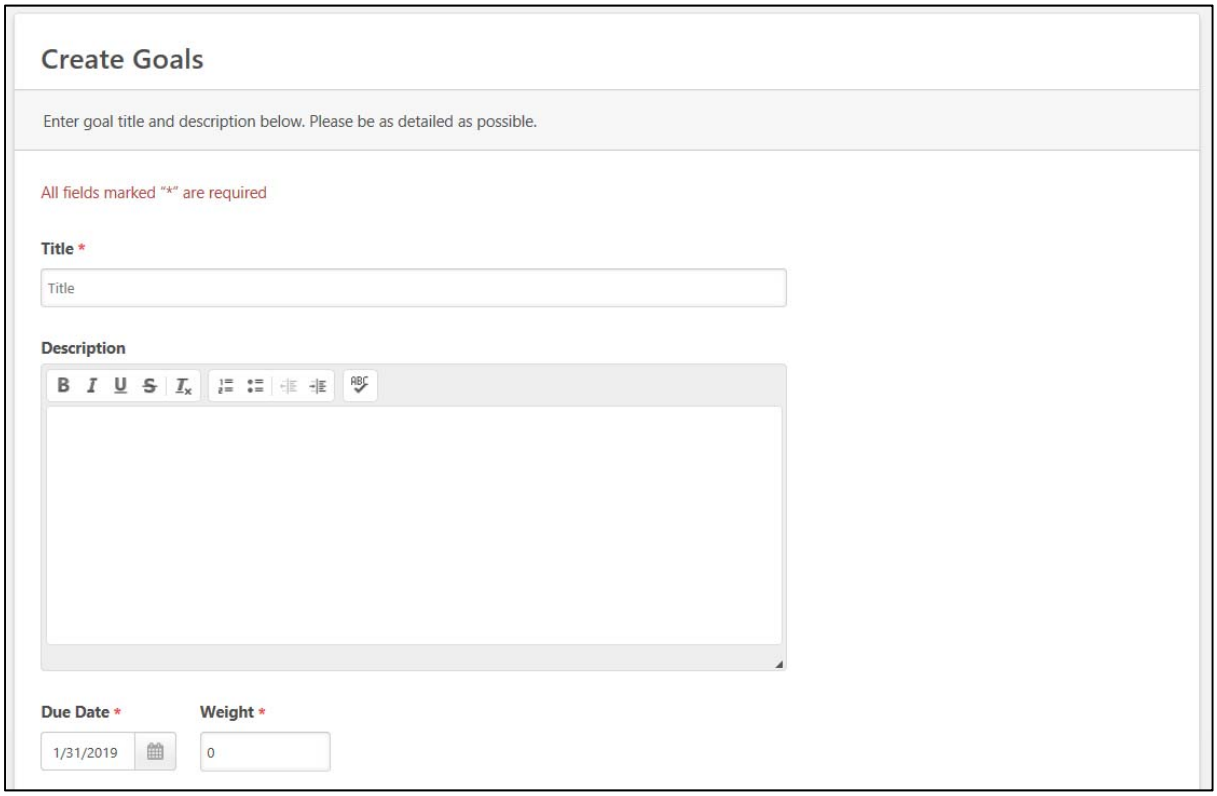


The My Goals page appears:



2. Click **Create** at the top-right corner of the page.

The Create Goals page appears:



3. In the **Title** field, type a name for your goal.
4. In the **Description** box, type as much detail as possible about your goal.
5. Notice the **Due Date** defaults to January 31.

   Note: The performance cycle starts on February 1 and ends on January 31 every year.
6. In the **Weight** box, type a value that represents the relative importance of the goal. The weight of all your goals should add up to 100%.
7. If applicable, expand the **Goal Alignment** list, select the appropriate alignment that your goal supports. If your goal does not support one of those listed, select Other.
8. Click the **Add Tasks** button to create activities and deadlines to assist your progress toward completing the goal. Adding tasks is optional. If you do not want to add a task, proceed to the next step.
   a. In the **Description** box, type the details of the task.
   b. Select a **Due Date** for completing the task.
   c. Assign a **Weight** value for the task. (All task weights for the goal should total 100%.)
   d. Click **Done**.

Note: When you complete tasks, you can edit the goal to indicate your progress by marking tasks complete.

9. If there are related documents that you want to associate with the task, click the **Choose File** button and select files to attach to the goal. Files must be less than 1MB in size. If you do not have attachments, proceed to the next step.
10. Select the option that represents who this goal is assigned to. You can choose **Yourself** or, if you're a supervisor, you can choose **Your team**. If you choose **Your team**, you can select one or more individuals (direct and indirect reports).
11. Click **Submit**. The goal is added to your profile for Mid-Year and Final Evaluation.
12. You can continue to create additional goals, or if you are finished submitting goals, click **Send Approval Request** form the My Goals page. The system displays a prompt asking whether to request approval for all pending goals.
13. Click **Yes**.

    Cornerstone issues email notifications as follows:

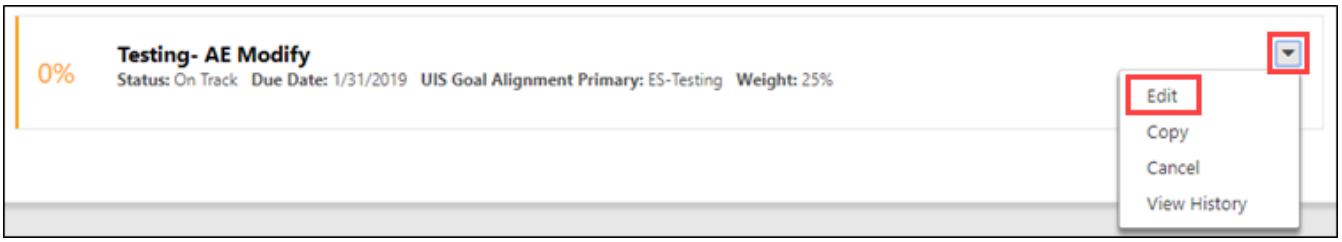
    - Supervisors receive an email notification that there is a goal pending approval.
      See Approving or Denying Goals (Supervisors Only) on page 7, for information about reviewing direct-report goals.
    - Employees receive an email notification after a goal is approved. They do not receive notification of denied goal requests; however, they will see Denied as the status of the goal on the My Goals tab.

Editing a Goal

You can edit a goal at any time. After a goal is edited, it will be subject to supervisor approval the same as when it was created.

To edit a goal:

1. Click the **Goal Options** button  at the right side of the goal.
2. Select **Edit** from the drop-down list.



3. Make your changes and click **Submit**.
4. Click **Send Approval Request** from the My Goals page. The system displays a prompt asking whether to request approval for all pending goals.
5. Click **Yes**.

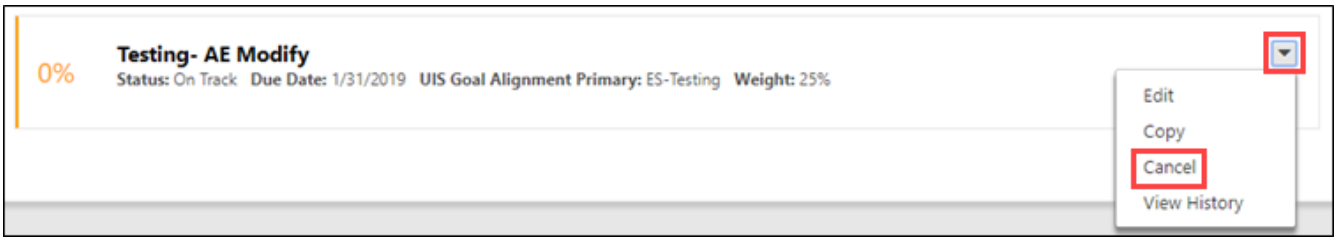
   Cornerstone sends an email notification to your supervisor for approval.

Cancelling a Goal

You can cancel a goal at any time. After a goal is cancelled, it will be subject to supervisor approval.

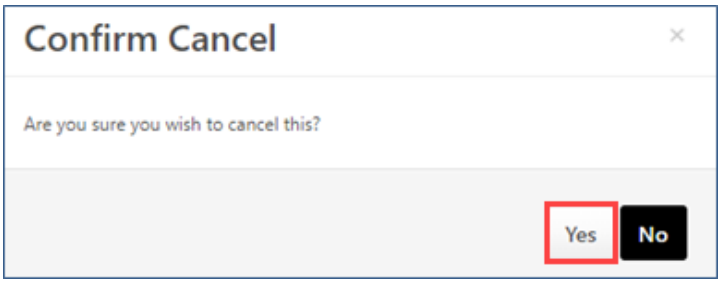
To cancel a goal:

1. Click the **Goal Options** button at the right side of the goal.
2. Select **Cancel** from the drop-down list.



A confirmation message appears, prompting you to confirm the cancellation.

3. Click **Yes** to confirm the cancellation of the goal.



Cancelled goals no longer appear under your active goals, but they are still in the system. To view cancelled goals, select the **Display Cancelled** checkbox from the My Goals tab, and click **Search**.

Approving or Denying Goals (Supervisors Only)

After an employee submits a goal, the employee's supervisor needs to log into Cornerstone to review the goals. The supervisor can approve, modify, or deny the goal request. Supervisors can see goals that are pending review in Cornerstone listed in the My Inbox section on the Welcome page.

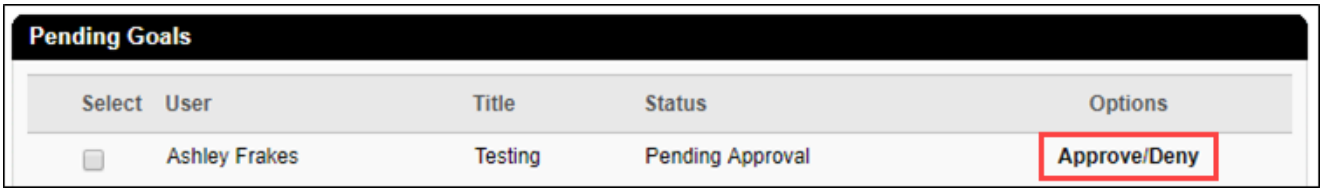
To review goal requests:

1. From the Welcome page, locate **My Inbox** and click the **Approve Goals** link.



A Pending Goals list appears, displaying goals submitted by your direct reports that need approval.

2. In the **Options** column, click the **Approve/Deny** link that appears to the right of the request.



The goal is opened in a window for you to review.

3. Review the goal and do one of the following:

- Make changes, if necessary, and click **Approve**. The employee receives an email notification that the goal has been approved.
- Click **Deny**. The employee does not receive an email notification; however, they will see **Status: Denied** on the My Goals tab.

  Employees can edit and submit a goal for approval several times. When a goal is denied, only the latest update is recorded.

Completing Performance Cycle Action Items

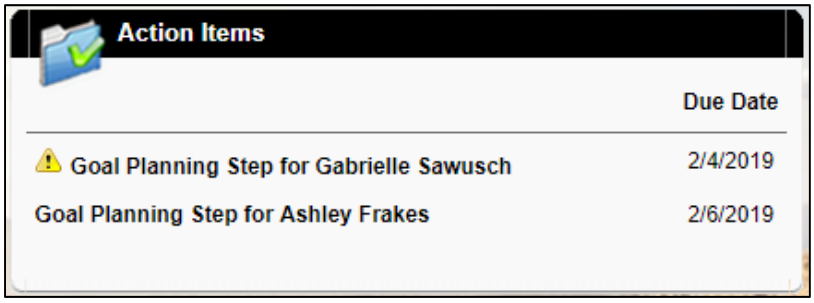
Employees and supervisors participate in the following performance management activities during the performance cycle:

- Goal and Performance Planning
- Mid-Year Review
- Final Evaluation

When an action associated with these activities is needed, you will receive an email notification with further instructions for completing an action item. You will see these actions listed under Action Items on the Cornerstone Welcome page.

To complete an action item:

1. From the Welcome page, locate **Action Items**. This section lists items you need to complete.



Note: The Action Items section displays 10 tasks only. To view all of your assigned action items, select **Scheduled Tasks** from the **Home** menu.

2. Click an action item to select it. A window opens for you to work with the item.

3. Review the steps of the action item as well as the overview that explains the process of the action and important details you should know before completing it.
4. Glick **Get Started**.
5. Sign-off on each step to acknowledge that it has been completed. Once all of the steps are completed, the action item is also completed.

Visit the System HR performance management website for an overview of each action item. The following table lists when these overviews will be available:

Action Item	**Overview available**
Goal and Performance Planning	March
Final Evaluation	January

Updating and Tracking Goal Progress

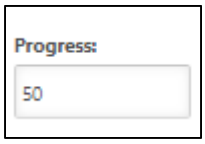
Throughout the performance cycle, it is important to update goals to ensure meaningful conversations with your supervisor about goal alignment, performance, and employee development in preparation for your mid-year review and final evaluation.

Updating Progress of Goals without Tasks

Goals that do not have tasks associated with them have a Progress field that lets you enter a value representing the percentage complete.

To update a goal's progress:

1. Click the **Expand** arrow on the right of the goal. 
2. In the **Progress** field, type a number (0-100) indicating the percentage complete:



You can also see the progress indicated by the color displayed on the left edge of the goal:

- **On Track:** Your goal appears green, indicating you are on schedule for completion.
- **Behind Schedule:** Your goal appears red, indicating the scheduled date has passed.
- **Completed:** Your goal appears green. You can choose to hide completed goals on your My Goals page by selecting the Hide Completed checkbox.



Updating Task Progress

Within each goal, you have the option to create tasks. Tasks are activities, or milestones, needed to complete the goal. You can have multiple tasks for a goal. The sum of the weights for all the tasks must equal 100%. It's important to update tasks once they are completed.

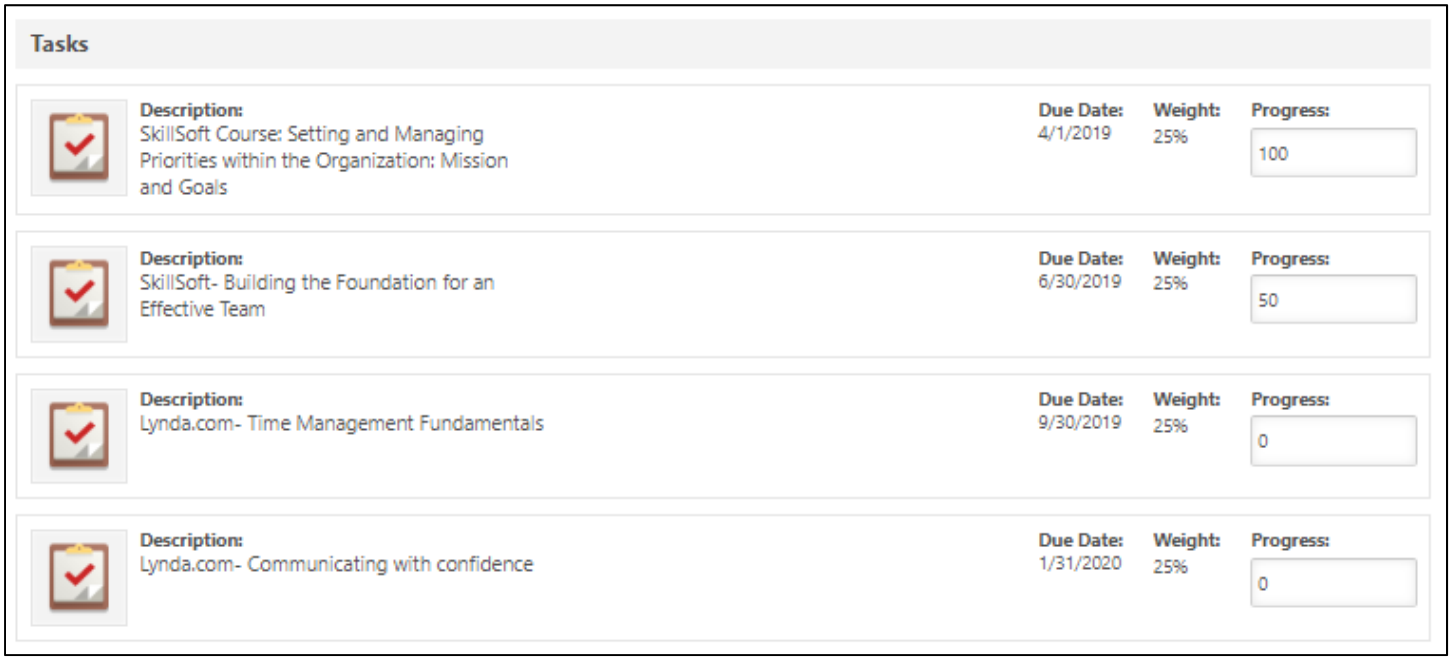
To update a task within a goal:

1. From the My Goals page, locate the goal with tasks that you want to update, and click the **Expand** arrow on the right.



2. Under Tasks, enter the percentage complete for each task. For example, if a task is complete, enter 100 in the Progress field for the task. If you are half-way completed with a task, enter 50.

   The status of your goal will update based on task end dates and progress completion. Behind schedule is triggered when one or more tasks are less than 100% complete with zero days remaining, or the overall goal progress is less than 50% complete after 50% of its time has elapsed. When task progress is 100, the goal status will update to complete.



Adding Comments and Attachments

Adding comments and attachments to your goal is a great way to track progress. You don't want to forget about achievements when it comes to mid-year review and final evaluation. You and your supervisor can both see all your goal details.

To add an attachment:

1. Click the **Expand** arrow on the right.
2. In the Attachments section, click **Choose File**.

To add a comment:

1. Click the **Expand** arrow on the right.
2. Under the Comments section, click **Add Comment**. An editing text box appears.



3. Type your comment in the Comments text box.
4. Click **Add**.

Notes:

- Adding attachments and comments will not send the goal to your supervisor for approval.
- Attachments can be edited and deleted within goal edit mode. Comments can be edited and deleted within goal edit mode or expanded goal display.

Reviewing Your Goal Details PDF Document

You can download a PDF file of all your goals and details. When completing your self-review at the end of performance cycle, this document could be helpful in demonstrating that you have been updating goal progress throughout the year.

To access the PDF file:

1. From the My Goals page, click **Options** in the top-right corner. 

2. Click **Download PDF - My Goals**. The PDF is generated and a message displays prompting you to open or save the file.
3. Click **Open**. An internet security message may appear, warning you that a website wonts to open content on your computer.
4. Click **Allow**. A browser window opens with your Goal Details document displayed.

