

# Cornerstone: Action Item Overview

## Goal and Performance Planning

At the beginning of the performance cycle, Cornerstone users complete the first activity of Goal and Performance Planning. When an action associated with activities is needed, you will receive an email notification with further instructions. The Goal and Performance Planning activity has three steps.

### Step One: Collaborate

On March 1<sup>st</sup>, the system sends all supervisors an email notifying them to login to the Performance Management System and review the Collaborate step. To perform this step, employees and supervisors meet to discuss goals and performance plans for the cycle.

To complete the action item:

1. From the Welcome page, locate the **Action Items** section.
2. Click **Goal Planning Step for (direct report)**. A window opens from which you can take action.
3. Review the step of the action item, the overview that explains the process of the action, and important details you should know before completing it.
4. Click **Get Started**.
5. After you have formally collaborated with your direct report on their goals and performance plan for this performance cycle, sign off on the Collaborate step.

### Step Two: Create Goals

After your supervisor signs off on the Collaborate step, you will receive an email notifying you to login to the Performance Management System and take action on the step assigned to you. To perform this step, employees create and submit your goals, as described in *Performance Management Using Cornerstone Step-by-Step Guide*. After you submit goals, be sure to click Send Approval Request, which notifies your supervisor that your goals are ready for review and approval.

To complete the action item:

1. From the Welcome page, locate the **Action Items** section.
2. Click the **Complete Goals Checklist** action item. A window opens from which you can take action.
3. Review the step of the action item, the overview that explains the process of the action, and important details you should know before completing it.
4. Click **Get Started**. Follow the steps to complete the item.
5. Complete the checklist and sign off on this step.

### Step Three: Review and Approve

After employees sign off on the Create Goals step, supervisors receive an email notifying them to complete this final step. Follow the same instructions as those described for step one.

Sign off on this step after you have reviewed and approved your direct reports' goals.

This activity is now complete. The next activity will be Mid-Year Reviews in August.