<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terminology</td>
<td>3</td>
</tr>
<tr>
<td>Welcome Page</td>
<td>4</td>
</tr>
<tr>
<td>View Goals</td>
<td>5</td>
</tr>
<tr>
<td>Manage Goals</td>
<td>7</td>
</tr>
<tr>
<td>Edit Goals</td>
<td>9</td>
</tr>
<tr>
<td>Cancel Goals</td>
<td>12</td>
</tr>
<tr>
<td>Create New Goals</td>
<td>14</td>
</tr>
<tr>
<td>Copy Goals</td>
<td>18</td>
</tr>
</tbody>
</table>
TERMINOLOGY

Understanding the meaning of a few key terms used in the performance management system will help avoid some potential confusion:

**Task** - An entire review or Planning Guide, from creation through final approval.

**Step** – Assigned items to complete within a task, such as the Employee Planning Guide and Manager Approves Planning Guide. You will receive email notifications when a Step is assigned. Complete the assigned Steps by the due date.

**Reviews** – Cornerstone labels both Planning Guide tasks and Annual Review Tasks as “reviews.”

**Goals** – Reviewed items that are unique to each user. Although Key Responsibilities may not necessarily have start and end dates, they are added as if they were goals. For ongoing Key Responsibilities, use the first day in the performance year as the start date and the last day in the performance year as the end date.

*The Planning Guide Task is composed of several Steps*
WELCOME PAGE

Log-in to Cornerstone Production (Live) by accessing the following URL: http://cornerstone.cscc.edu.

Tabs in the menu bar are dependent upon the user’s level of access.

For purposes of the Performance module, use the following tabs:
1. **Home** – click on this tab to access your Universal Profile
2. **Performance** – click on this tab to access:
   - Goals
   - Performance Reviews
3. **Help Resources Center** – click on this tab to access the myPLAN Quick Guides and Forms
Your Inbox
Managers will see notices to approve goals. Employees will not see any notices in this section. Click the Approve Goals link to view goals that need approved.

Your Tasks
Items listed in the Your Tasks box refer to steps related to a performance review such as the Planning Guide and Annual Review. When you have a Planning Guide, Annual Review, or sign-off step to complete, a link to the step appears here.

VIEW GOALS
Navigate to the Performance tab in Cornerstone. Select the Goals sub link.

Employees can view all of their goals from the Goals tab.

GOALS:
Throughout the performance year, employees are encouraged to document progress on goals. New goals may need to be created to reflect new assignments, projects or responsibilities or existing goals.

The My Goals page accessed through the Goals tab contains all current goals. Options available include:
- View Goals
- Manage Goals
- Edit Goals
- Create Goals
- Copy Goals
- Cancel Goals
Goals are listed in alphabetical order by default. Goals that overlap with the time period selected are listed under My Goals. By default, goals with start or due dates during the current performance year are displayed.

The date range can be adjusted by either selecting a timeframe from the drop-down list or selecting specific dates using the calendar feature.

**Current Period** is the performance year date range. **Previous Period** is the prior performance year date range.

To add cancelled goals to your view, click in the box to the left of **Display Cancelled**, located above the list of goals. Cancelled goals are hidden by default.

To hide completed goals from your view, click in the box to the left of **Hide Completed**, located above the list of goals. Select different date ranges to view older goals. Completed goals are visible by default.
MANAGE GOALS

Employees can view goal details and update goal progress by either clicking on the Goal Title or selecting the arrow to the right of the goal. Goals in Pending Approval status cannot be managed (only edited).

The following information and functions are accessible when managing a goal:

1. **Status**: This is the overall goal status, determined by goal progress and the amount of time remaining for completion.
2. **Goal Progress**: This is the overall goal completion percentage. Update goal progress by sliding the progress bar forwards or backwards. The percentage updates immediately.
3. **Attachments**: This section displays all relevant materials attached to the goal. Click Choose File under the Attachments heading to attach a file. Up to three files can be attached to each goal. The maximum upload size is 1mb. File types are limited to Word, Excel, PowerPoint, Outlook, pdf, txt, rft, gif, and jpg. Approval is not required to upload attachments.
   
   When one or more files are attached, they appear under the Attachments heading and can be removed by clicking the “x” to the right of the file name.
4. **Comments**: This section allows employee and managers to add comments related
to all aspects of the goal. All comments are visible in this section. To add a comment, click the Add Comment link below the Comments heading. Once the comment is typed in the text box, click Add. To reply to a comment, click the Reply (speech bubble) icon under the existing comment. To edit or delete a comment, click the drop-down arrow and select the appropriate action.

**Goal Status:**

“**In Progress**” is the default status for all goals with at least some progress. The progress bar is green in color.

Goals appear “**Behind Schedule**” when progress is less than 50% and more than 75% of the time between the start and end date has passed. The progress bar is yellow in color.

Goals with less than 5% progress are listed as “**Not Started**.” There is no color in the progress bar.

Goals with 100% progress will display as “**Completed**.” The progress bar is blue in color.

**Comments:**

Employees are encouraged to record comments throughout the performance year to demonstrate contributions made to the success of the goal. Use this section to describe actual progress on the goal, roadblocks encountered, feedback received, milestones met, etc. These comments can be viewed when conducting the annual review.

Managers can also add comments about goal progress and/or reply to employee comments. Use the speech bubble icon below the comment to reply.

Comments should not replace regular conversations regarding goal progress between employees and managers.
Goal history provides date-stamped occurrences of the editing and managing history of the goal. Information listed in the goals History include creation, edits, approval/denial, and progress updates. Comment and attachment history are not included in this section.

To view the history of a goal, use the pull-down arrow to the right of the goal title and select View History.

A pop-up box containing the goal history appears. Click Close to close the pop-up box.

EDIT GOALS

Employees can change goal details by selecting Edit from the drop-down menu to the right of each goal.
Through the Edit Goal page, the goal Title, Description, Start and Due Dates, as well as Review Category can be edited. Comments can also be added, edited, or deleted from this page.

Use the Comments section to document changes made to the goal.
Once the edits are complete, click **Submit** at the bottom of the page. The status of the goal becomes *Pending Modification Approval*. Click the **Send Approval Request** button on the My Goals page to send an email to the manager, notifying him/her of the change.

Adding or removing attachments and adding comments do not require approval. All other changes require approval.

A pop-up box appears asking if you are sure you want to send an approval request. Click **Yes** to continue. Click **Cancel** to cancel sending the request.

Once the Approval Request is sent, the Send Approval Request button changes to Request Sent. This button cannot be clicked.
CANCEL GOALS

Goals can be cancelled by clicking the drop-down arrow to the right of the Goal Title and selecting **Copy**.

A pop-up box appears asking if you are sure you want to cancel the goal. Click **Yes** to continue. Click **No** to disregard the goal cancellation request.

The status of the goal becomes **Pending Cancellation Approval**. Click the **Send Approval Request** button from the My Goals page to send an email to the manager.

**Cancelling a Goal:**

Goals may be cancelled due to a change in job responsibilities or priorities.

Goals should not be cancelled because the employee did not work on the goal.

Cancelling a goal may leave you without a goal in all Review Categories. Make sure to have at least one goal in each of the four Review Categories before the end of the performance year to avoid receiving a zero (0) for that section during the Annual Review.
A pop-up box appears confirming the Send Approval Request. Click Yes to continue. Click Cancel to cancel sending the request.

Once the Approval Request is sent, the Send Approval Request button changes to Request Sent. This button cannot be clicked.
Cancelled goals do not appear in annual reviews and remain hidden in the list of goals. Check the “Display Cancelled” box to reveal them.

If the only goal in a specific Review Category is canceled, create a new goal in that same Review Category before the performance year ends; there MUST be at least one goal in each category.

**CREATE NEW GOALS**

From the My Goals page, click the Create button at the top of the screen.
Enter the following information on the Create Goals page:

1. **Title:** This is the title for the goal and will appear on the My Goals page. The field is limited to 100 characters.

**SMART GOALS**

Goals should be written in the "SMART" format:

- **Specific** - Describe the specific work using observable actions, behaviors, or achievements.
- **Measurable** - Describe how the user will know he/she is making progress toward completion of the goal.
- **Action-Oriented** - Describe the goal using action verbs and outline the steps to be taken to accomplish the goal.
- **Results-oriented/Relevant** - Describe what it will look like when the goal is achieved.
- **Time-bound** - Include the start and/or end date of the goal.

For more information and examples of SMART Goals, visit the Goal Planning page on the myPLAN website at: [http://cscce.edu/about/human-resources/cornerstone/performance/goals.shtml](http://cscce.edu/about/human-resources/cornerstone/performance/goals.shtml).
2. **Description:** The goal description should contain an overview of the goal, including objectives or parameters. This field can be formatted using the text formatting buttons provided and is limited to 10,000 characters.

3. **Start Date and Due Date:** This defines the date the goal begins as well as the day by which it should be completed. Each date defaults to the first and last day of the performance year but can be changed if necessary. Select the start and due date based on the goal. When viewing goals, the Start Date and Due Date are used to determine which goals display. *If any part of the goal falls within the specified time frame, the goal displays.* The default dates for new goals are the performance year and do not need to be changed. Start/End dates can be changed to any date within the performance year. The minimum date range for a goal is two (2) calendar days.

4. **Review Category:** This dropdown box contains four options: Key Responsibilities, Operational Goals, Professional Development Goals, and Service Goals. Select the appropriate category for each goal. **At least one goal must be entered for EACH category.**

   **REVIEW CATEGORY:**

   Review Categories organize goals into proper sections for the Annual Review:

   **Key Responsibilities** are significant job duties critical to the position; the tasks the job was established to perform. These may not fit the SMART format.

   **Operational Goals** provide direction and specific targets and typically change from year to year.

   **Professional Development Goals** focus on the development of a skill, knowledge or ability needed to be successful.

   **Service Goals** focus on valuable contributions (skills, knowledge, service) made to the college outside of regular assigned duties.

   Each review category is weighted and there must be a goal in each of the four categories to avoid getting a zero (0) for the section. **At least one goal for EACH category must be entered.**

   For more information and examples of Review Categories, visit the Goal Planning page of the myPLAN website at [http://cscc.edu/about/human-resources/cornerstone/performance/planning.shtml](http://cscc.edu/about/human-resources/cornerstone/performance/planning.shtml).

5. **Attachments:** Up to three documents relevant to the goal may be attached. Attachments can be Word, Excel, PowerPoint, Outlook, pdf, txt, rtf, gif, or jpg files.
   a. Click on Choose File under the Attachments heading to attach a file to the goal. Browse for the file and click Upload.
6. **Assignment:** Indicates who the goal will be assigned to. Employees can assign goals to themselves. Therefore there is nothing additional to complete. Managers can assign goals to themselves or member(s) of their team. For instructions on how managers assign goals to members of their team, please see the Create Goal section in the Managing and Documenting your Team’s Goals Quick Guide.

**Cancel:** The Cancel button will clear everything that has been entered.

**Save as Draft:** Click the Save as Draft button to return to it at a later time. The goal is saved and not submitted for approval or visible to anyone else.

**SUBMIT:** Once the required information for the goal has been entered, click the Submit button at the bottom of the page. The goal status changes to **Pending Approval** and is listed in the My Goals section of the Goals page. Click the **Send Approval Request** button from the My Goals page to send an email to the manager.

A pop-up box appears confirming the Send Approval Request. Click Yes to continue. Click **Cancel** to cancel sending the request.
Once the Approval Request is sent, the Send Approval Request button changes to Request Sent. This button cannot be clicked.

**COPY GOALS**

Goals can be copied by clicking the drop-down arrow to the right of the Goal Title and selecting **Copy**.
The Create Goals page is displayed and a copy of the goal is shown. Modify the goal details as needed and click submit.

The goal status changes to *Pending Approval* and is listed in the My Goals section of the Goals page. Click the **Send Approval Request** button from the My Goals page to send an email to the manager.
A pop-up box appears confirming the Send Approval Request. Click **Yes** to continue. Click **Cancel** to cancel sending the request.

Once the Approval Request is sent, the Send Approval Request button changes to Request Sent. This button cannot be clicked.