myPLAN – MANAGER (REVIEWER)

Completing Performance Review of Employee

Revision Date: 12/22/2016
The Performance Review is the final task to complete in the performance management cycle. This review is conducted in partnership between the manager and employee. It reflects the performance standards, tasks and goals of the employee for the review cycle.

Employees and managers should discuss the results of the performance review prior to the manager completing his/her rating.

Once an employee has completed his/her self-review, a step entitled “Complete Review Step of (Employee’s Name)” will be listed in the Your Tasks box on the Welcome page. The due date for the step will also be listed. Click the step name to begin.

There are eight sections included in the Performance Review (excluding the sign-off) after the Overview:

- Key Responsibilities
- Operational Goals
- Professional Development Goals
- Service Goals
- Competencies
- Significant Accomplishments
- Summary
- Bonus Rationale

**CORNERSTONE LOG-IN**

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

From the log in page select “Sign in to one of the following sites:” and select “Cornerstone Production (Live)” from the drop down.

Type in your CSCC network login information when prompted (i.e. Username@cscc.edu, network password). When the user is logged in, a Welcome message appears below the banner.
WELCOME PAGE

Navigate to the desired menu item within Cornerstone. Tabs in the menu bar are dependent upon the user’s level of access. For purposes of the Performance module, you will use the following tabs:

1. **Home** – click on this tab to access:
   - Scheduled Tasks
   - Announcements
   - Universal Profile: Users can create and view their profile

2. **Performance** – click on this tab to access:
   - Goals
   - Performance Reviews

3. **Help Resources Center** – click on this tab for Quick Guides and forms

4. **Your Tasks** – Items listed in the Your Tasks box refer to steps related to a performance review such as approving an employee’s planning guide and completing an employee’s review. When a step in the performance review is assigned to you, a link to the step appears here.

REVIEW OF EMPLOYEE

Click here to open the review step.
**TERMINOLOGY**

**Task** - A Performance Review or Planning Guide, from creation through final approval.

**Step** – Assigned items to complete within a task, such as Manager Review of Employee and Manager Sign-Off. You will receive email notification when a Step is assigned. Complete the assigned Steps by the due date.

**Reviews** – Cornerstone labels both Planning Guide tasks and Performance 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 cycle as the start date and the last day in the performance cycle as the end date.

**OVERVIEW PAGE**

There are five sub tabs under the Options drop-down menu:

1. **Add Co-Planners** – A Co-Planner is another manager selected by the reviewer that can complete all or part of an employee’s review. Once the Add Co-Planner option is selected, enter the manager’s name in the search box. Click Save to add the co-planner. **Note: Please consult your HR Business Partner before adding a Co-Planner.**
2. **Attachments** – Up to three attachments can be uploaded to the performance review. Clicking Attachments also allows users to view these files. Each file can be up to 1 MB in size.

3. **View Feedback** – Users can view feedback (CougarPaws/Kudos) provided throughout the performance cycle. It is recommended to view feedback prior to starting the review of an employee. Note: CougarPaws/Kudos are associated with competencies and could be used as partial documentation of your skills and abilities.

4. **Print Review** – Users can print a copy of the performance review. *NOTE: results will not print until the review is complete and all signatures are final.*

5. **Print Reviewee Version** – Users can print a copy of the performance review only containing the sections visible to the employee. *NOTE: results will not print until the review is complete and all signatures are final.*

The **Progress Wheel** in the upper right corner indicates sections of the performance review that have been viewed. Managers MUST visit all sections before submitting the review of an employee step. If the Progress Wheel displays less than 100%, use the back button at the bottom of the page to visit skipped sections.

The **Review Step Progression** area at the bottom of the screen outlines the status of each step in the task. Gray boxes with a check mark indicate the step is complete. White boxes indicate the step is not complete.

**Reopen Step** – The Reopen Step option restarts the Performance Review process with the employee, but keeps the information that has previously been added. Selecting the Reopen Step opens a comment box where the manager can enter the reason for reopening. The comment is included in the email to the employee. The employee then makes the necessary edits and resubmits the Performance Review to his/her manager for completion using the original process.

To begin, click either:

1. **Get Started** at the bottom of the page or
2. Any review section in the left side navigation.
KEY RESPONSIBILITIES AND GOALS

For each Key Responsibility and goal, assess the employee’s performance using the rating scale. Select the appropriate rating by utilizing the drop-down menu located under the Details of the Key Responsibility or goal. Enter goal comments (if applicable) in the text box below the rating scale drop-down menu.

Click the drop-down arrow in the right-hand corner of each goal to view comments and/or attachments associated the goal.

To view additional details about the goal, click More, located under the goal’s due date.

The rating and comments (if applicable) made by the employee are located under the Comments heading. Note: Comments will appear in future reviews for items copied or advanced into future review cycles.

Once all items have been rated, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Save and Exit** – This button saves the information and returns the user to the Cornerstone Welcome page. Return at any point to resume completion of the performance review.
- **Save and Continue** – This button saves the information already completed and moves the user to the next section of the performance review.
COMPETENCIES

For each Competency, reflect on how the employee’s work has been completed throughout the performance cycle and provide ratings based on the skills and behaviors associated. Select a rating by clicking in the circle below the rating. Provide comments to further explain your rating (required).

Clicking on Rating History provides the rating the employee gave himself/herself for the specific competency bullet point.

The rating that appears in this section is the rating for the overall competency. Note: Comments made by you and the employee will appear in future reviews.

Once all Competencies have been rated, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Save and Exit** – This button saves the information and returns the user to the Cornerstone Welcome page. Return at any point to resume completion of the performance review.
- **Save and Continue** – This button saves the information already completed and moves the user to the next section of the performance review.
SIGNIFICANT ACCOMPLISHMENTS

Describe what you consider to be significant accomplishments the employee completed during the performance cycle. Enter this information in the text box. This section is optional, but offers a succinct place to summarize the employee’s accomplishments for potential review by the next level administrator.

Once the Significant Accomplishments section is complete, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Save and Exit** – This button saves the information and returns the user to the Cornerstone Welcome page. Return at any point to resume completion of the performance review.
- **Save and Continue** – This button saves the information already completed and moves the user to the next section of the performance review.
- **Submit** – The Submit button appears when all sections of the performance review are complete. Clicking the button sends the performance review to the next user assigned in the task setup. Once submitted, modifications to the performance review can only be made if the step is reopened by the next user assigned to the review. Note: *If the Submit button is clicked at the point, the Summary section will NOT appear.*
SUMMARY

The Summary section provides the ratings of the employee and manager for each section along with an overall rating of the performance review.

NOTE: At this point, the review of employee step has NOT been submitted.

Once the Summary section has been reviewed, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Submit** – Clicking the button sends the performance review to the next user assigned in the task setup. Once submitted, modifications to the performance review can only be made if the step is reopened by the next user assigned to the review.

When the Submit button is clicked a pop-up box appears, indicating that modifications cannot be made to the performance review once submitted and asks if the user wants to submit now. Click Cancel to return to the performance review. Click Submit to complete the review of employee step of the performance review. You are done with the review of employee step of the Performance Review Task.
BONUS RATIONALE / MANAGER SIGN-OFF

Once the next level administrator has looked over the employee’s performance review (if opted to do so), a step entitled “Complete Review Step of (Employee’s Name)” will be listed in the Your Tasks box on the Welcome page. The due date for the step will also be listed. Click the step name to begin.

From the Overview page, click Bonus Rationale on the left side of the page to go directly to that section in the performance review or Get Started at the bottom of the page to look through the review.
If applicable, respond to the question in the text box. **DO NOT ENTER A DOLLAR ASMOUNT IN THIS SECTION.**

Once the Bonus Rationale information has been entered, if applicable, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Save and Exit** – This button saves the information and returns the user to the Cornerstone Welcome page. Return at any point to resume completion of the performance review.
- **Save and Continue** – This button saves the information already completed and moves the user to the next section of the performance review.

**SUMMARY**

The Summary section provides the ratings of the employee and manager for each section along with an overall rating of the performance review.

**NOTE:** At this point, the Manager Sign-Off step has **NOT** been submitted.

Click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Next** – The Next button moves the user to the next section in the performance review.

**MANAGER SIGN-OFF**

By signing the performance review, managers are indicating that they have met with the employee and discussed the review. The text box below the signature section provides the manager with an opportunity to add any additional comments to the performance review.
To sign the performance review, enter your first and last name in the box provided and click Sign.

To re-enter the signature, click Redo.

Enter any additional comments here. Note: comments are visible to all reviewers and included in the archive of the review.

Once the electronic signature is entered, click one of the following navigation buttons at the bottom of the page:

- **Back** – The Back button returns the user to the previous section of the performance review.
- **Save and Exit** – This button saves the information and returns the user to the Cornerstone Welcome page. Return at any point to resume completion of the performance review.
- **Submit** – The Submit button appears when all sections of the performance review are complete. Clicking the button sends the performance review to the next user assigned in the task setup. Once submitted, modifications to the performance review can only be made if the step is reopened by the next user assigned to the review.

When the Submit button is clicked a pop-up box appears, indicating that modifications cannot be made to the performance review once submitted and asks if the user wants to submit now. Click Cancel to return to the performance review. Click Submit to complete the Manager Sign-Off step of the performance review. You are finished with the Performance Review Task for the employee.