myPLAN – MANAGER (REVIEWER)

Managing and Documenting Your Team’s Goals

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TERMINOLOGY

Understanding the meaning of a few key terms used in the performance management system will help to 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.

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

Log-in to Cornerstone Production (Live) by accessing the following URL:  http://cornerstone.csc.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:
   - Universal Profile: Users can create and view their profile
   - My Team: View direct reports

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 or cancel goals. 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 performance reviews 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.

MANAGE MY TEAM GOALS

Managers can view and update the goals of direct reports by selecting the Goals sub link under the Performance tab from the Cornerstone Welcome page.

From the My Goals Page, click the Team Goals tab.

Feedback & Coaching:

Throughout the performance year, manager and employee should review established goals and ensure the employee is on track to be successful in meeting performance goals and expectations by the end of the performance year. Progress toward accomplishments and challenges should be documented for each Key Responsibility, competency and goal. Based on these discussions, changes or revisions can be made to goals and standards if conditions or priorities have changed.

It is important for both the employee and manager to document examples of how the employee meets expectations and any successes or barriers. This information will automatically be compiled into the Annual Review.
Direct reports are listed, along with their overall goal completion percentage. To view the goals and goal progress of each employee, click the arrow to the right of the overall goal completion percentage.

Goals for each employee 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.

Employee goals can be viewed and sorted by: timeframe, dates, and status.

To add cancelled goals to your view, click in the box to the left of Display Cancelled, located above the Status drop-down menu. 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 Status drop-down menu. Completed goals are visible by default.

*NOTE: By hiding completed goals, the employee’s overall goal completion percentage recalculates to include only incomplete goals. To view the employee’s goal completion percentage for ALL approved goals, uncheck the Hide Completed box.

**View and sort goals:**

1. **Timeframe:** Use the drop-down menu, defaulted to Current Period, to view goals for a specific time period. **Current Period** is the performance year date range. **Previous Period** is the prior performance year date range.

2. **Date range:** Select specific dates using the calendar feature to view goals within the chosen dates.

3. **Status:** Use the drop-down menu, defaulted to All Statuses, to view goals in a specific status.
Approved Goals:

- Display a status based on the progress and time remaining for completion
  1. **Not Started**: Less than 5% progress
  2. **In Progress**: At least some progress
  3. **Behind Schedule**: Progress is less than 50% and more than 75% of time between the start and end date has passed
  4. **Completed**: At least 100% progress

Pending Goals:

- Goals pending some sort of action display as:
  1. Pending Approval: Employee has created a new goal. The manager needs to review then approve or deny the goal.
  2. Pending Modification Approval: Employee has made a change to an approved goal. The manager needs to review the changes then approve or deny the goal.
  3. Pending Cancellation Approval: Employee has generated a goal cancellation request. The manager needs to review then approve or deny the request.

The goal completion percentage, status, due date, and review category are listed under the title of each goal for all direct reports.

The lock icon to the right of the goal title allows managers to lock the goal. Employees cannot edit a goal when it is in lock status.
Update or Provide Feedback on Goal Progress

Managers can view goal details 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.

Manage Goals:

Employees are encouraged to update the progress of goals throughout the performance year by sliding the progress slider forwards or backwards, attaching support materials and entering comments to document progress.

Managers are encouraged to review the goal progress of employees and provide feedback on goal progress throughout the performance cycle.

The comment feature can help facilitate and document communication between employees and managers, but should not replace direct conversations.
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 manager.

Progress & Status:

To update goal progress, slide the progress bar forwards or backwards. The percentage updates immediately.

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

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 filled with the color yellow.

Goals with less than 5% progress are listed as “Not Started.” The progress bar is filled with the color red.

Goals with at least 100% progress will display as “Completed.” The progress bar is filled with the color blue.
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.

**Approve Goal - Status: “Pending Approval”**

**Employee Initiates a New Goal**

Employees can create a new goal from the Create Goals page. Once submitted, an approval notification appears in the Your Inbox box on the Welcome page.

If the employee sent an “Approval Request,” the manager also receives an email requesting to log-in to Cornerstone and approval or deny the goal.

Click Approve Goals in the Your Inbox to go to the Pending Goals page:

**Create Goal:**

Throughout the performance year, employees may want to create additional goals to reflect new assignments, projects or responsibilities.

Create SMART goals from the My Goals page by clicking on the Create button.
New submitted goals are displayed as “Pending Approval.” To view the goal, click the **Approve/Deny** link in the Options column. The Edit Goals page opens.

Managers have the option to:

1) approve the goal as is  
2) edit the goal  
3) invite the employee to edit the goal at a meeting with the manager  
4) deny the goal which sends it back to the employee to edit

Managers can also Approve or Deny the goal by clicking the corresponding button at the bottom of the Edit Goals page. Clicking Cancel closes the Edit Goals page.

Click the Add Comment link under the Comments heading to document the decision.

Goal history can be viewed by selecting View History from the Options drop-down menu On the Edit Goals page.
Manager Initiates a New Goal

Managers can create a new goal for an employee from the Team Goals page. Select the Create button to open the Create Goals page.

Approve/Deny:
Managers should document any edits to the submitted goal prior to approving the goal. Once the goal is either approved or denied, it is removed from the Pending Goals list.

Managers are required to add a comment when denying a goal. Once denied, the employee receives an email notification indicating the goal has been denied.
Enter the goal details (title, description, start and end dates, and review category). If applicable, add an attachment. Under the Assignment heading, click the radio button to the left of “Your team.”
Click in the box to the left of the employee(s) to assign the goal. To assign the goal to all employees, click in the box to the left of the “Name” heading. By clicking **Submit**, the goal will appear in the appropriate team member(s) goal list. Clicking **Save as Draft** saves a draft of the goal. The goal is **not** assigned to the employee(s) until the Submit button is clicked. The appropriate team member(s) also receive an email indicating a goal has been assigned to them.

**Edit Goal – Status: “Pending Modification Approval”**

**Employee Initiates Changes to an Approved Goal**

Employees can edit an approved goal by using the edit function. (See *Employee: Managing and Documenting Your Goals* Quick Guide.) Once submitted, an approval notice appears in the Your Inbox box on the Welcome page.

If the employee sent an “Approval Request” the manager also receives an email requesting to log-in to Cornerstone and approval or deny the goal.

Click **Approve Goals** in the Your Inbox to go to the Pending Goals page:
Goals submitted with edits are displayed as “Pending Modification Approval.” To view the goal, click the **Approve/Deny** link in the Options column. The Edit Goals page opens.

Managers have the option to:

1) approve the goal as edited  
2) edit the goal  
3) invite the employee to edit the goal at a meeting with the manager  
4) deny the goal which sends it back to the employee to edit  

Managers can also Approve or Deny the goal edits by clicking the corresponding button at the bottom of the Edit Goals page. Clicking Cancel closes the Edit Goals page.
Click the Add Comment link under the Comments heading to document the decision.

Manager Initiates Changes to an Approved Goal

Managers can make changes to an employee’s approved goal by using the Edit Goals function. To access the Edit Goals function, maneuver to the Goals page and click the Team Goals tab. Expand the goal details of the employee. Click the drop-down arrow to the right of the goal to be changed and select Edit.

Approve/Deny:

Managers should document any revisions made to the edited goal prior to approving the goal. Once the goal is either approved or denied, it is removed from the Pending Goals list.

Managers are required to add a comment when denying a goal. Once denied, the employee receives an email notification indicating the goal has been denied.
Complete any edits to the goal details and add a comment indicating what edits were made by clicking the Add Comment link under the Comments heading. Click **Submit** at the bottom of the page to submit the edits.
Cancel Goal – Status: “Pending Cancellation Approval”

Employee Initiates Cancellation of an Approved Goal

Employees can generate a goal cancellation request by using the cancel goal function. (See Employee: Managing and Documenting Your Goals Quick Guide.) Once submitted, an approval notification appears in the Your Inbox box on the Welcome page.

If the employee sent an “Approval Request” the manager also receives an email requesting to log-in to Cornerstone and approval the cancellation request.

Click Approve Goals in the Your Inbox to go to the Pending Goals page:

Submitted cancellation requests display as “Pending Cancellation Approval.” To view the goal, click the Approve/Deny link in the Options column. The Edit Goals screen opens.

Cancel Goal:

Canceling a goal may leave employees without a goal in a particular review category. Managers should help employees create a replacement goal before the end of the performance year to meet the requirement of at least one goal per review category.
Managers have the option to:

1) approve the goal cancellation
2) edit the goal
3) invite the employee to edit the goal at a meeting with the manager
4) deny the cancellation request which sends the goal back to the employee to edit

Managers can also Approve or Deny the goal cancellation by clicking the corresponding button at the bottom of the Edit Goals page. Clicking Cancel closes the Edit Goals page.

Click the Add Comment link under the Comments heading to document the decision.

Approve/Deny:

Managers should document any edits to the submitted goal prior to approving the goal. Once the goal is either approved or denied, it is removed from the Pending Goals list.

Managers are required to add a comment when denying a goal. Once denied, the employee receives an email notification indicating the goal has been denied.
Manager Initiates Cancellation of an Approved Goal

Managers can cancel an employee’s approved goal by using the Cancel Goal function. To access the Cancel Goals function, maneuver to the Goals page and click the Team Goals tab. Expand the goal details of the employee. Click the drop-down arrow to the right of the goal to be cancelled and select Cancel.

A pop-up box appears confirming the cancellation of the goal. Click Yes to continue. Click Cancel to discontinue the cancellation.

The employee will receive an email indicating the goal has been cancelled. The goal will display as “cancelled” in the employee’s My Goals section, but will not appear in his/her annual review.

Copy Goal

Managers can copy any goal by selecting Copy from the drop-down arrow to the right of the goal.
Edit the goal details as necessary. If applicable, add an attachment. Under the Assignment heading, click the radio button to the left of “Your team.”

Click in the box to the left of the employee(s) to assign the goal. To assign the goal to all employees, click in the box to the left of the “Name” heading. By clicking **Submit**, the goal will appear in the appropriate team member(s) goal list. Clicking **Save as Draft** saves a draft of the goal. The goal is not assigned to the employee(s) until the Submit button is clicked. The appropriate team member(s) also receive an email indicating a goal has been assigned to them.

**Copy Goal:**

The Copy Goal function allows managers to copy one of their own goals or goals created by one of their employee and assign it to a different employee on their team.
### Assignment

Select to whom this goal will be assigned.

- [ ] Yourself
- [ ] Your team

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<tr>
<th>Name</th>
<th>Title</th>
<th>Direct and Indirect Reports</th>
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<tr>
<td>Manager One</td>
<td>Assistant Director</td>
<td></td>
</tr>
<tr>
<td>User One</td>
<td>Program Coordinator</td>
<td></td>
</tr>
<tr>
<td>User Two</td>
<td>Specialist</td>
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### Options

- [x] Create a separate goal for each user.
- [ ] Dynamic Assignment

[Cancel] [Save as Draft] [Submit]