Cornerstone 101 – Creating Goals and the Performance Planning Task

Using Cornerstone
Cornerstone is a tool you already have access to as an employee of CU Boulder. To view your account:
- Visit the campus HR performance webpage or log into your employee account.
- Scroll down to “Tools & Forms” and “Cornerstone for Performance Management” on the webpage (or “Business Tools” in your employee Portal then find the “Cornerstone” tile).
- Follow the login prompts

PART 1: Creating Goals in the Performance Plan

Creating a Goal
1. Starting from the Cornerstone homepage, navigate to the Performance Planning page by clicking the tile or clicking the hamburger menu and selecting Performance Planning.
2. If you are a University Staff member, please cancel all of the Core Competencies. If you are a Classified Staff member, you will want to allow these to remain in place.
3. In the top right of the Performance Planning page, click the Create button.
4. Add a title for your goal and input a description. For University Staff update the Start Date to 07/01/23. For Classified Staff update the Start Date to 06/01/23. Select “Goal” as the Type and select the University Imperative that most closely aligns with your goal. You will want to uncheck the box labeled “Allow other users to see and align.” Feel free to upload any relevant attachments. Click “Submit”.
5. Once you have entered all of your goals and canceled core competencies (if applicable), click “Send Approval Request” in the upper right corner of your screen. This will initiate an email to your supervisor requesting that they review and approve your goals.

Approval Process for Goals (As a Supervisor)
1. Supervisors should navigate to the Cornerstone homepage, scroll down to their Inbox tab, and click on “Approve Performance Plan”.
2. Check the box for each individual performance plan item created by an employee that you would like to approve or deny.
3. Select the “Approve Request” button with a green check mark next to it if you want to approve. You also have the option to deny the request.
4. The inbox will update to reflect all changes made, and if you have approved the request, you will see the new goals appear in your employee’s performance plan.
PART 2: The Performance Planning Task (utilize for both supervisor and employee)

1. Supervisors will first be asked to acknowledge/confirm goals (above). On the Cornerstone home page, there is a section for “Tasks (Action Required).” Please click “My 2023-24 Performance Planning Checklist”. (this section will not be available for employees to complete until your supervisor initiates it.)

2. This will bring you to a new screen. On the left side you will see “Sections.” Expand that and start with “Performance Plan Review” – review, scroll down to the bottom, and click “Next.” Select either “University Staff Goal Planning” or “Classified Staff Goal Planning.” After checking the box, scroll down & click “Next.” On the “Employee Acknowledgement” section, type your name and sign, scroll to the bottom and click “Submit.”

3. After the supervisor confirms/approves their employee’s goals, the employee will then receive the system-generated email from Cornerstone to review the Performance Planning Checklist. Follow the instructions from the prior step.

Please note: you may see an error that the weightings of the goals do not equal 100%. If you have already confirmed that all goal weightings do equal 100%, acknowledge the pop-up message and then continue through the approval/confirmation steps to complete the goal planning process. This bug has been identified by the Cornerstone team and no solution is available to-date.

If you need some additional guidance, please reference one of the self-help links below from the Goal Setting and Performance Planning sections of the Cornerstone Knowledgebase:

- Goal setting as an employee
- Pushing goals out as a supervisor
- Delete, cancel, and edit goals
- Approving goals as a supervisor
- Copy goals from a previous period into the next period