



University of Colorado
Boulder

Cornerstone for Performance Management Supervisor and Employee User Guide: Classified and University Staff

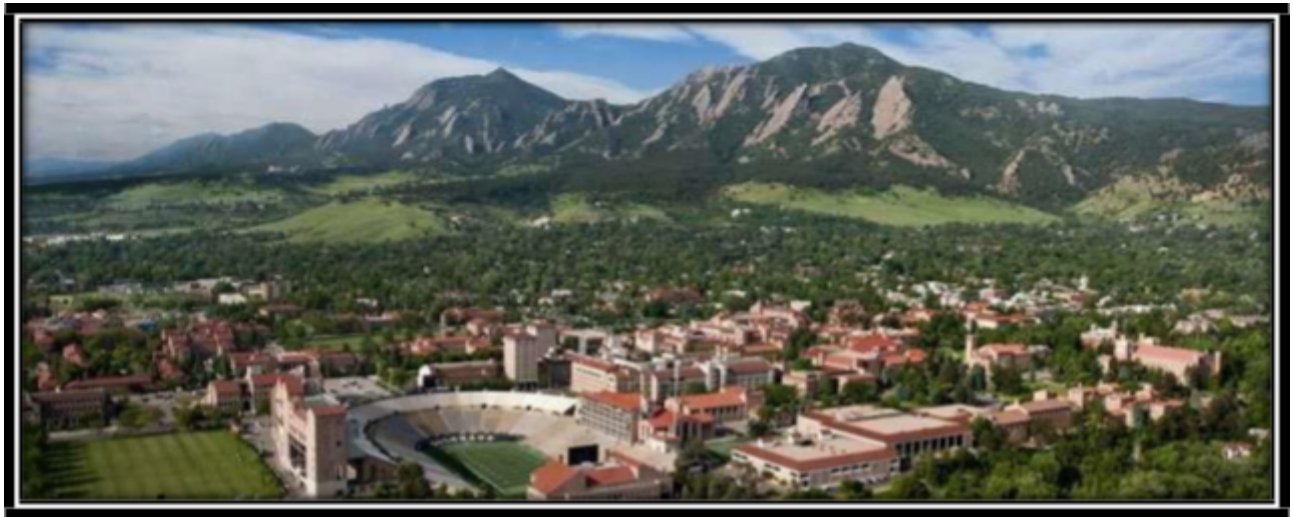


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Performance Management

Introduction

The University of Colorado Boulder is excited to offer a new online performance management solution (Cornerstone) to better support our collective efforts toward improving talent management on campus. The specific goals of this tool are to:

- Alleviate the administrative burden of our existing and varied performance management processes
- Better align work occurring across campus in support of specific unit goals and the Chancellor's Strategic Imperatives
- Introduce campus competencies more broadly to demonstrate the importance that work be accomplished in a manner that is consistent with University values and the Colorado Creed
- Facilitate more frequent and meaningful conversations between Employees and Supervisors as they relate to goal alignment, performance, and Employee development
- Better calibrate how different performance ratings are utilized across campus to ensure they are assigned fairly and equitably

As Supervisors and Employees, you hold the key to realizing the promise of this new approach to performance management and to the effective use of this new and powerful tool.

Purpose of This User Guide

This user guide is intended to be a comprehensive resources to aid Cornerstone users through the three steps in Performance Management; Planning, Coaching, Evaluation; and answer any additional questions you may have.

Resources

In addition to this user guide, many tools and resources are available to assist you and your teams through the implementation of Cornerstone. You can find all of those tools as well as contact information for Employee Relations staff here: www.colorado.edu/hr/cornerstone

Important Definitions

Alignment: The critical ability for every individual within the University, no matter their role, to understand how their work supports and connects (aligns) to the short and long-term objectives of the University.

Competencies: The skills and behaviors Employees develop and demonstrate to execute their goals and job duties. While goals and job duties articulate “what” is to be done, competencies provide guidelines for “how” that work gets done.

Goals: Observable and measurable future results to be achieved within a reasonably specific timeframe. CU Boulder Employees should plan and execute 1-3 team or individual goals during a given performance period.

Job Duties: The general tasks and day-to-day operational responsibilities of a given role, the work generally outlined in a position description. While goals tend to be specific projects to be delivered during specific time frames, job duties remain fairly constant for a given position over time.

Performance Management: The year-long process through which Supervisors and Employees work

together to establish expectations and provide ongoing feedback regarding those expectations. The process consists of three steps: 1) Performance planning 2) Mid-year review-coaching and 3) End-of year evaluation.

Performance Plan: The entire list of goals, job duties and competencies for every Employee that can be created and modified at any time (24 hours a day, 7 days a week) by both Employee and Supervisor. The only times in which the Performance Plan is not able to be modified are: 1) during Cornerstone software maintenance periods 2) after the Year End Evaluation has been conducted and finalized by both Employee and Supervisor which occurs at the end of the performance cycle.

Tasks: Supervisors will receive one Task for each of their Employees, at three separate times during the performance cycle; 1) Performance Planning Checklist Task (sent to Supervisors at the beginning of the performance cycle), 2) Mid Year Coaching Session Task (sent to Supervisors at the midyear point of the performance cycle), and 3) Year End Evaluation Task (sent to Supervisors thirty days prior to the deadline for the year end evaluation). Found on the Home Page, a Task is a checklist of items that ensure all required and recommended actions have been taken. Tasks requires action which is first confirmed and e-signed by the Supervisor and then moves to the Employee for confirmation and e-signature. Tasks that have not been completed will display until the last day of the performance cycle.

Getting Started with Performance Planning

Establishing Employee Performance Plans is a key supervisory responsibility. Effectively setting individual Employee goals and job duties and closely tying them to the University's overall Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an Employee and their Supervisor that is focused on using feedback as a professional tool.

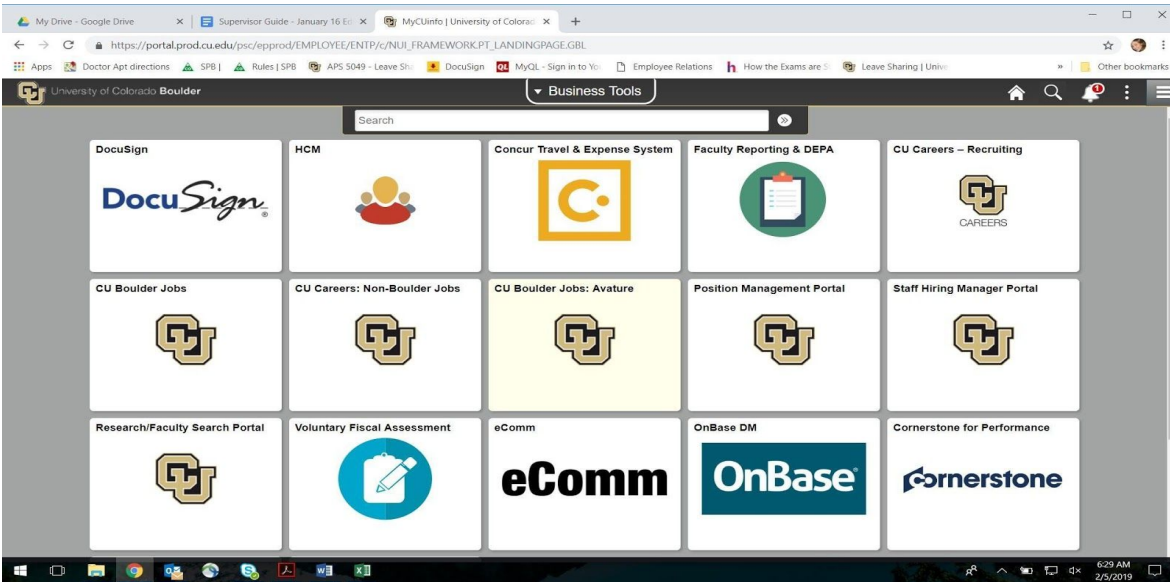
At the beginning of each performance management cycle (University Staff performance management cycle is February 1 - January 31 and Classified Staff performance management cycle April 1 - March 31), Supervisors are tasked with developing Performance Plans for their Employees. While plans should be created within Cornerstone, using such tools as the SMART goal wizard and alignment capability, they must be discussed with the Employee through an in-person dialogue. If you have not established a plan for your Employees in Cornerstone, please do so before completing the Performance Planning Checklist task outlined in this user guide.

The Performance Plans created within Cornerstone serve as a fluid representation of the Employees responsibilities during the performance cycle. They can and should be edited throughout the performance cycle based on the changing needs of the Employee and department. These plans, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone at the end of the plan year.

Login to Cornerstone

The Cornerstone for Performance Management portal is available via the MyCUinfo portal:

1. Log into [MyCUinfo](#) with your IdentiKey
2. Select CU Resources in the NavBar
3. Select Business Tools
4. Select the "Cornerstone for Performance" tile



Note: If the MyCUinfo portal is down, you can also access Cornerstone through the following link:
<https://colorado.csod.com/samldefault.aspx>

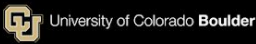
5. Login to Cornerstone using your CU Boulder IdentiKey and password



University of Colorado Boulder
Office of Information Technology
IT Service Center | 303-735-HELP(4357)

Home Page Review

1. Upon logging in, you will land on the Cornerstone **Home Page**.
2. Review all tiles for important details regarding performance management philosophy, the performance evaluation process and timeline, and performance tasks that require your review and completion.

3. Please note the link to the University's Strategic Imperatives. This will direct you to the Chancellor's Strategic Plan and give robust definitions of the Colorado Creed, and the Chancellor's Strategic Imperatives.
4. Additionally, please return here at any time to provide feedback to the implementation team on your experience using Cornerstone or to submit a "ServiceNow" ticket if you need help.


University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

August:
You and your supervisor will formally check-in for the mid-year coaching task, within Cornerstone, and review your progress towards your plan. Updates and comments should be made within Cornerstone during this formal check-in.

January:
You will be asked to review the progress that you made towards your plan over the past year and will have the option to comment. Your supervisor will be asked to do the same, and a final performance evaluation and rating will be assigned.

Ask Questions and Provide Cornerstone Feedback

The use of Cornerstone for performance management is new to CU Boulder, therefore, we request that you share your thoughts regarding your experiences with this solution. We will use your feedback to evolve our configuration of Cornerstone to ensure it is meeting the ongoing needs of our campus.

To provide feedback or request assistance with the Cornerstone tool, please fill out the [Cornerstone Help Form](#).

Performance Planning

Profile & Snapshot

Inbox


Approve Performance Plan
(Your employees have 1 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
⚠️ Approve 2019-2020 Review for Little Buffalo	9/17/2019

Disclaimer

Please be advised that the content within the Cornerstone tool is intended for providing performance management feedback and will not be monitored or considered a resource for policy violation reporting purposes. Allegations of workplace misconduct, FMLA retaliation, nepotism, amorous relationship policy violations, sexual misconduct, protected class discrimination or harassment, or retaliation should be reported through established reporting channels. see [The Office of Institutional Equity and Compliance reporting and resolution options](#). For a list of confidential and non-confidential campus resources, please refer to: [The Office of Institutional Equity and Compliance resources](#).


Cornerstone

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Cornerstone Notifications

Performance Plan Notifications

A. Supervisor Initiated Actions

1. Supervisor modifies a goal/job duty/competency within the Performance Plan and clicks **Submit**
 - i. Cornerstone will send an email notification to the Employee if any of the below items are modified in the Performance Plan:

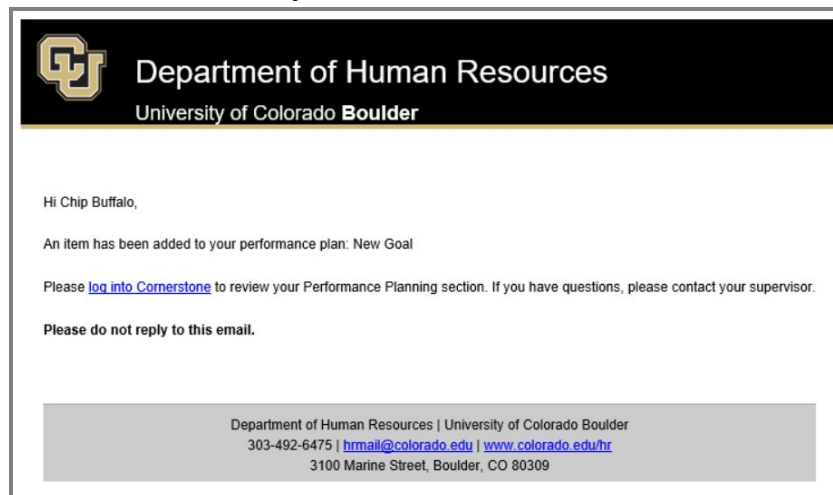
Title
Description
Start Date
Due Date
Weight
Type
University Imperative
Tasks and Targets details
Alignment

Email Notification Subject: Cornerstone: A Change Has Been Made to “Goal Name”



2. Supervisor adds a new goal to Employee's Performance Plan
 - i. Cornerstone will send an email notification to the Employee if a new goal/job duty/competency has been added to the Performance Plan

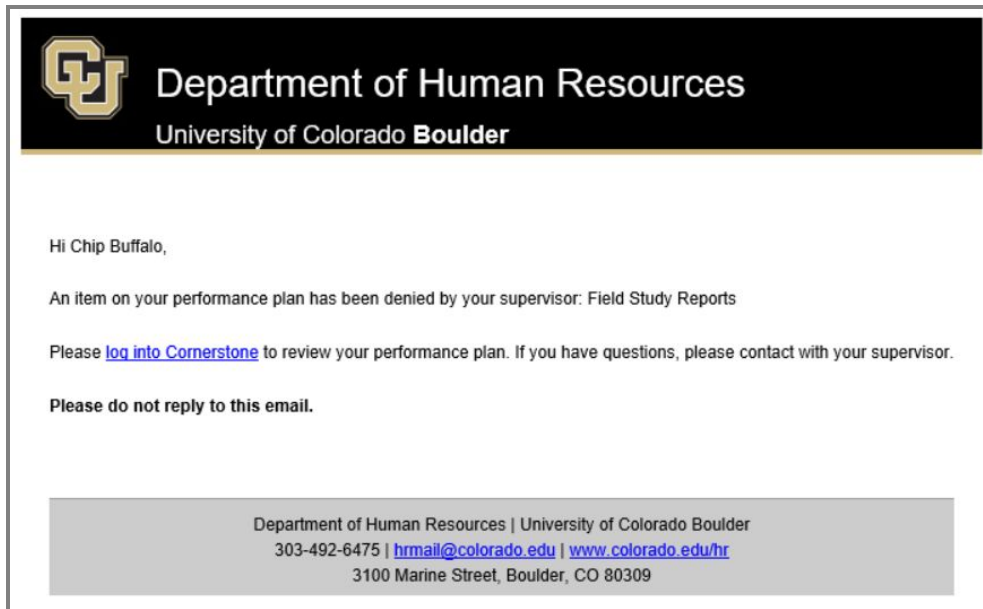
Email Notification Subject: Cornerstone: New Item Added to Your Performance Plan



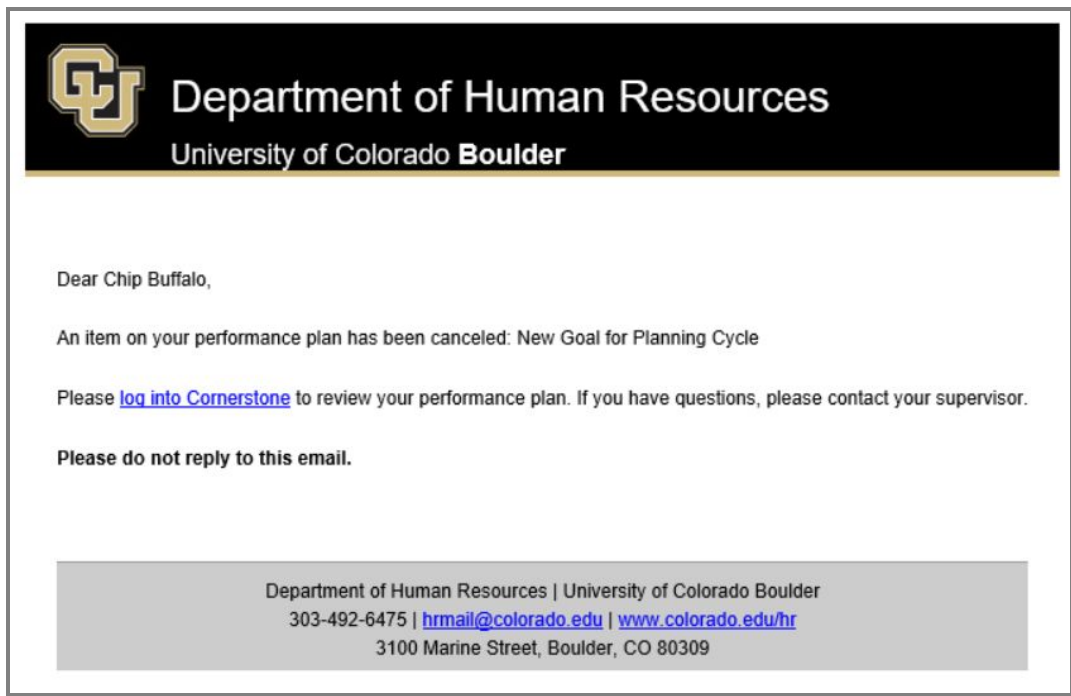
3. Supervisor approves a goal/job duty/competency within the Performance Plan
 - i. Cornerstone will send an email notification to the Employee if a goal/job duty/competency has been approved Performance Plan
Email Notification Subject: Performance Plan Changes/Additions Approved



4. Supervisor denies a goal/job duty/competency within the Performance Plan
 - i. Cornerstone will send an email notification to the Employee if a goal/job duty/competency has been denied
Email Notification Subject: Performance Plan Item Denied by Your Supervisor



5. Supervisor cancels a goal within the Performance Plan
 - i. Cornerstone will send an email notification to the Employee if a goal/job duty/competency has been cancelled
Email Notification Subject: Performance Plan Item Cancelled by Your Supervisor

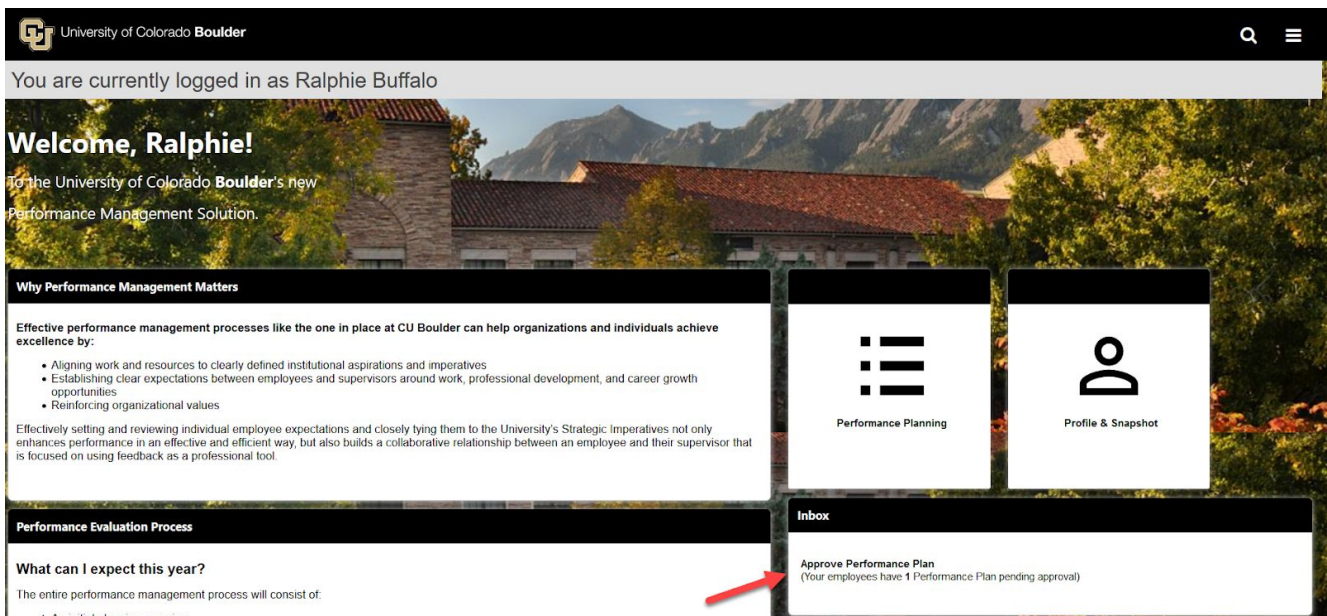


B. Employee Initiated Actions

1. Employee creates or edits a goal within their Performance Plan and clicks **Submit**

- i. Cornerstone Inbox item will appear *for the Supervisor*

Cornerstone Inbox Notification: Approve Performance Plan



- ii. No notification email will be sent

2. Employee clicks **Send Approval Request** to generate an email notification to their Supervisor for any goals/job duties/competencies that are still pending approval in their Supervisor's inbox

- i. For an Employee to access any currently Pending Approval items in their Performance Plan, click **Performance Planning** on the Home Page

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Documented review check-in sessions

Performance Planning

Profile & Snapshot

Inbox

No Items

Tasks (Action Required)

Click **Send Approval Request**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Performance Plan My Performance Plan

My Performance Plan

Create Options

Goals, Job Duties, Competencies

My Performance Plan Team Performance Plan

Current Period 4/1/2019 1/31/2020 Search

☐ Display Cancelled ☐ Hide Completed

My Performance Plan 8 Manager's Performan... 1

Send Approval Request

My Performance Plan

***Core Competency 1: Integrity/Responsibility/Ethics**
Status: Completed Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

***Core Competency 2: Inclusive Excellence**
Status: -Select Option- Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

- ii. Cornerstone will send only one email notification to the Supervisor when an item has been submitted by the Employee for approval
Email Notification Subject: Performance Plan Item Submitted for Approval



Department of Human Resources
University of Colorado Boulder

Hi Ralphie Buffalo,

Chip Buffalo has submitted edits to their performance plan for your approval. Please [log into Cornerstone](#) to approve/deny these edits. You can view these items in your inbox on the homepage of Cornerstone.

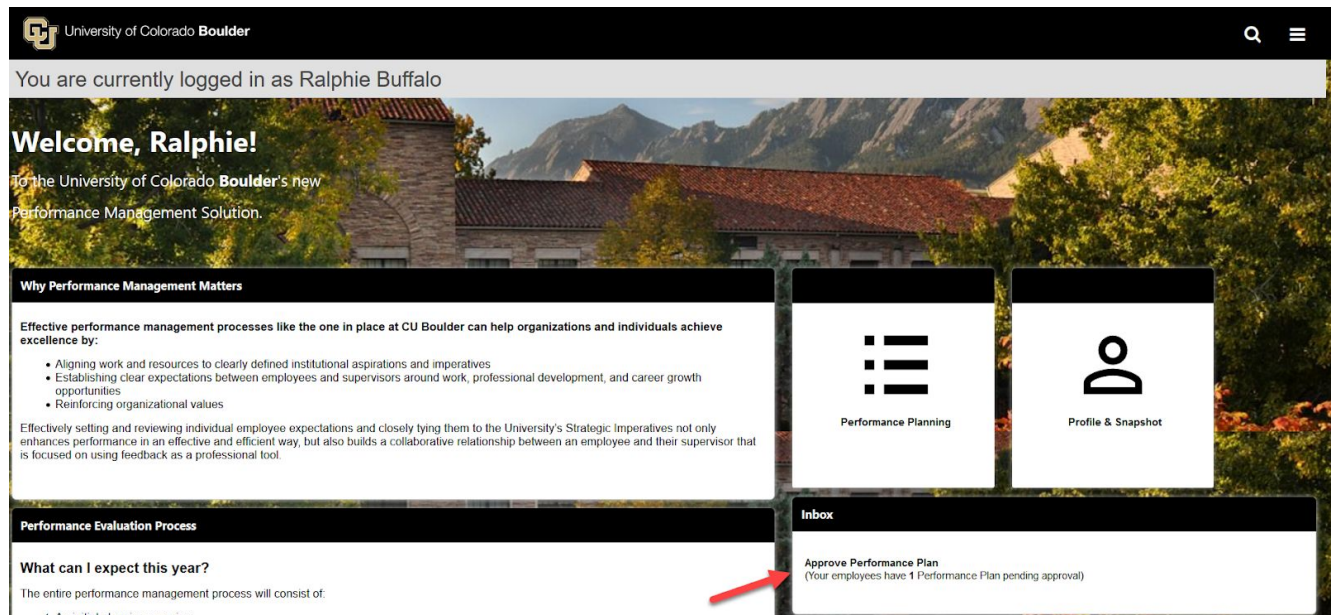
Please do not reply to this email.

Department of Human Resources | University of Colorado Boulder
303-492-6475 | hrmail@colorado.edu | www.colorado.edu/hr
3100 Marine Street, Boulder, CO 80309

3. Employee cancels a goal/job duty/competency within the Performance Plan

i. Cornerstone Inbox item will appear for the Supervisor

Cornerstone Inbox Notification: Approve Performance Plan



ii. No notification email will be sent

iii. Supervisor will have the option to select each goal where changes require approval

1. The items with the status of "Pending Cancellation Approval" are goals/job duties/competencies an Employee has cancelled
2. The items with the status of "Pending Modification Approval" are goals/job duties/competencies an Employee added or cancelled

File Edit View History Bookmarks Tools Help

Realize Your Potential: colorado x +

https://corporate1proxy-stg.csod.com/EPM/Goals/PendingGoals.aspx?tab_page_id=-580170

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Pending Performance Plan

You may individually, or as a group, view, approve, or deny the Performance Plan.

Check / Uncheck All ☐ Include Performance Plan for inactive users

Select	User	Title	Status	Options
<input type="checkbox"/>	Chip Buffalo	*Core Competency 4: Collaboration	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Chip Buffalo	Field Study Reports	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Chip Buffalo	New Goal for Planning Cycle	Pending Approval	Approve/Deny

« Back **✓ Approve Request** **✗ Deny Request**

cornerstone

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C. Actions That Will Not Generate Email or Cornerstone Inbox Notifications

1. Goal Comments
 - i. Any comments made within the comment section of a goal will NOT generate an email notification or notification in the Cornerstone inbox
2. Visibility
 - i. Any changes to the visibility of the goal/job duty/competency will NOT generate an email notification or notification in the Cornerstone inbox
3. Attachments
 - i. Any added attachments will NOT generate an email notification or notification in the Cornerstone inbox

Performance Management Task Notifications

Cornerstone automatically generates a Performance Planning Task, Mid Year Coaching Task and a Year-End Final Evaluation Task for both University and Classified staff. These tasks always initiate within the Supervisor's **"Tasks (Action Required)"** tile at the start of the task. Simply stated, the Task functions solely as a means to obtain the electronic signature sign-off that actions were taken by both Supervisor and Employee.

A. System Initiated Actions

1. Task is launched in Cornerstone to all Supervisors

- i. Cornerstone will populate Task in Supervisors **"Tasks (Action Required)"** box on the Home Page
- ii. No notification email is sent to Supervisors

Why Performance Management Matters

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August:
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January:
You will be asked to review the progress that you made towards your plan over the past year and will have the option to comment. Your supervisor will be asked to do the same, and a final performance evaluation and rating will be assigned.

Inbox

Approve Performance Plan
(Your employees have 3 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
⚠ Approve 2019-2020 Review for Little Buffalo	9/17/2019

Disclaimer

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- iii. Cornerstone will send an email notification to the Employee (once the Task has been completed by Supervisor) that the Task awaits Employee completion

💡 *Note: For Classified Staff, the Reviewer will receive the email notification after the Supervisor has completed the Task*

Email Notification Subject: A Performance Review Step Has Been Assigned To You (ACTION REQUIRED)



Department of Human Resources

University of Colorado Boulder

Hi Chip Buffalo,

A Performance Review Step, Supervisor Review, is assigned for Little Buffalo.

Please [log into Cornerstone](#) to review your current tasks.

Please do not reply to this email.

Department of Human Resources | University of Colorado Boulder
303-492-6475 | hrmail@colorado.edu | www.colorado.edu/hr
3100 Marine Street, Boulder, CO 80309

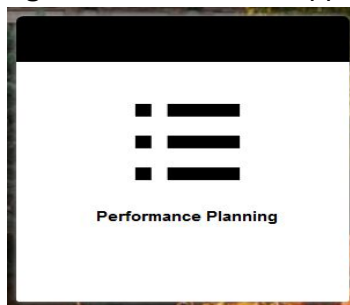
2. Task has been completed in its entirety by both the Supervisor and Employee

- i. Supervisor receives email notification
- ii. Employee receives email notification

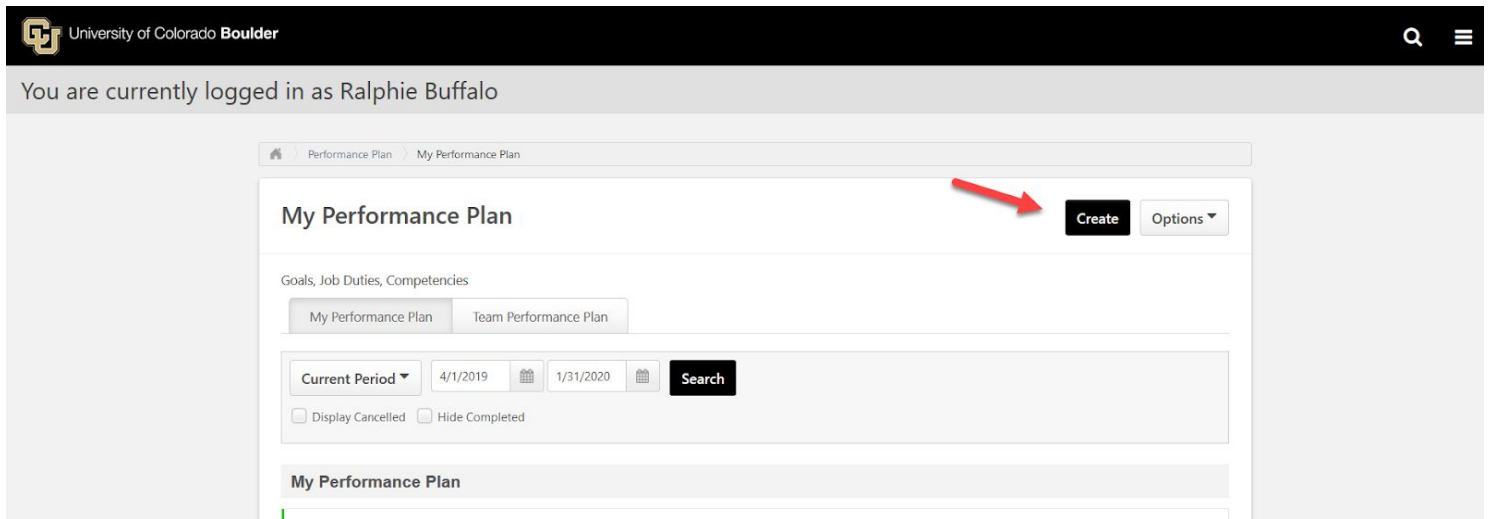
💡 *Note: For Classified Staff, the reviewer will not receive an email notification after a Task has been completed*

Create Performance Plans

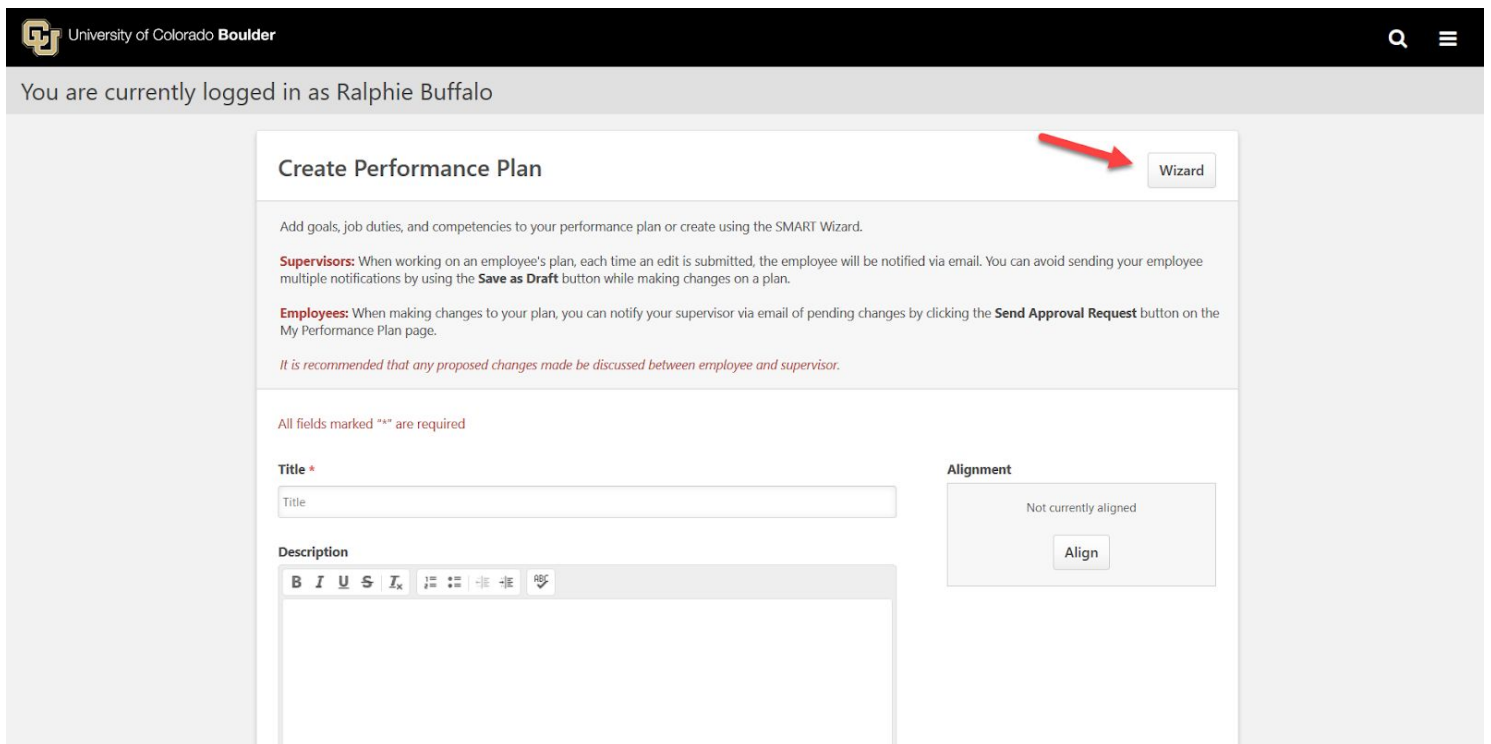
1. Click on the “**Performance Planning**” tile located in the upper-right corner of the **Home Page**



2. To add goals, job duties, and competencies to either your performance plan, your direct, or indirect employees' plan, click the **Create** button on the top right of the screen



- If you would like to be walked through writing SMART goals, you can click **Wizard** on the top right-hand corner of this page



- Enter the title and description for your goal, job duty, or competency

Title *

Title

Description

B I U S I_x [List] [Link] [Image] [Table] [Checkmark]

- If applicable, align your goals with higher-order departmental goals by clicking **Align**

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Create Performance Plan

Wizard

Add goals, job duties, and competencies to your performance plan or create using the SMART Wizard.

Supervisors: When working on an employee's plan, each time an edit is submitted, the employee will be notified via email. You can avoid sending your employee multiple notifications by using the **Save as Draft** button while making changes on a plan.

Employees: When making changes to your plan, you can notify your supervisor via email of pending changes by clicking the **Send Approval Request** button on the My Performance Plan page.

It is recommended that any proposed changes made be discussed between employee and supervisor.

All fields marked "*" are required

Title *

Alignment

Not currently aligned

Align

Description

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- You may search for any individual on campus who has visible goals by clicking the **window search box** and entering the individuals name

File Edit View History Bookmarks Tools Help

Create Goals - Realize Your Potenti...

https://corporate1-proxy-stg.csod.com/phnx/driver.aspx?routename=Goals/GoalEdit&q=^e7nKucwZe

University of Colorado Boulder

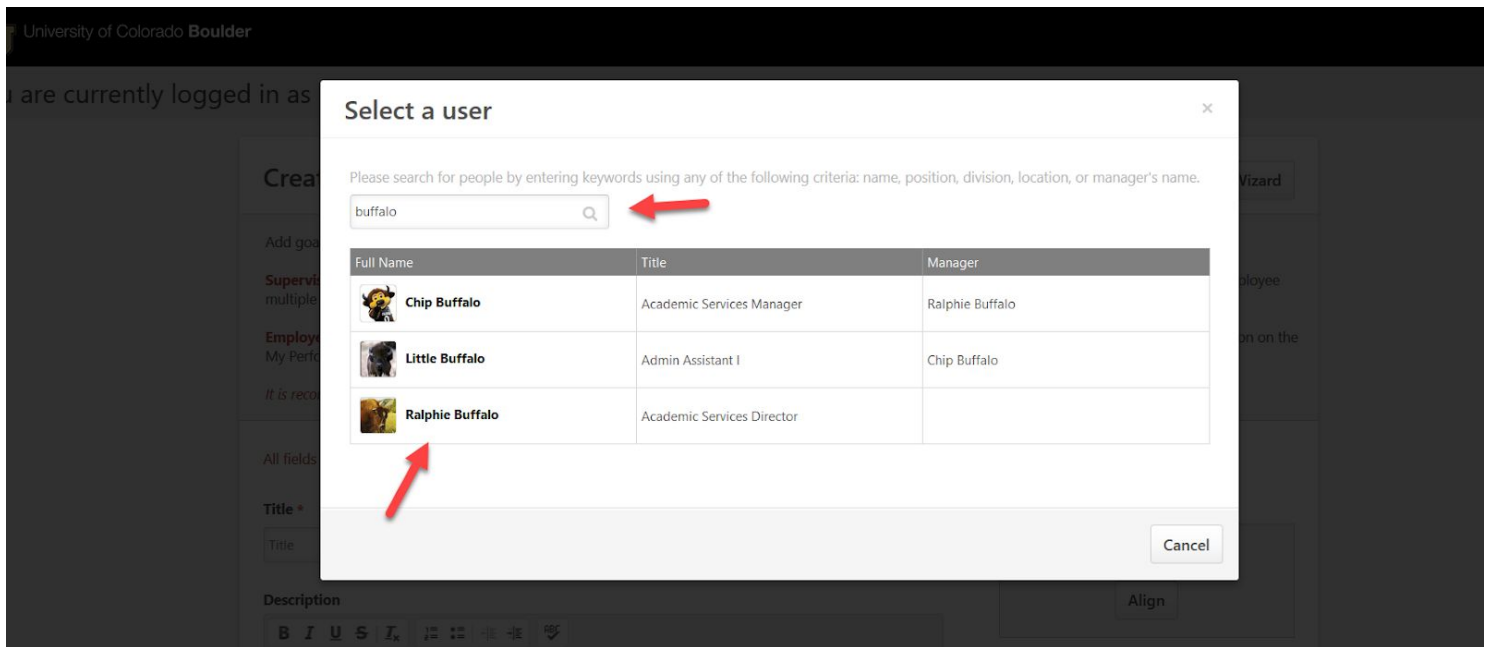
Alignment

Select a goal to align with, or select none to create an independent goal.

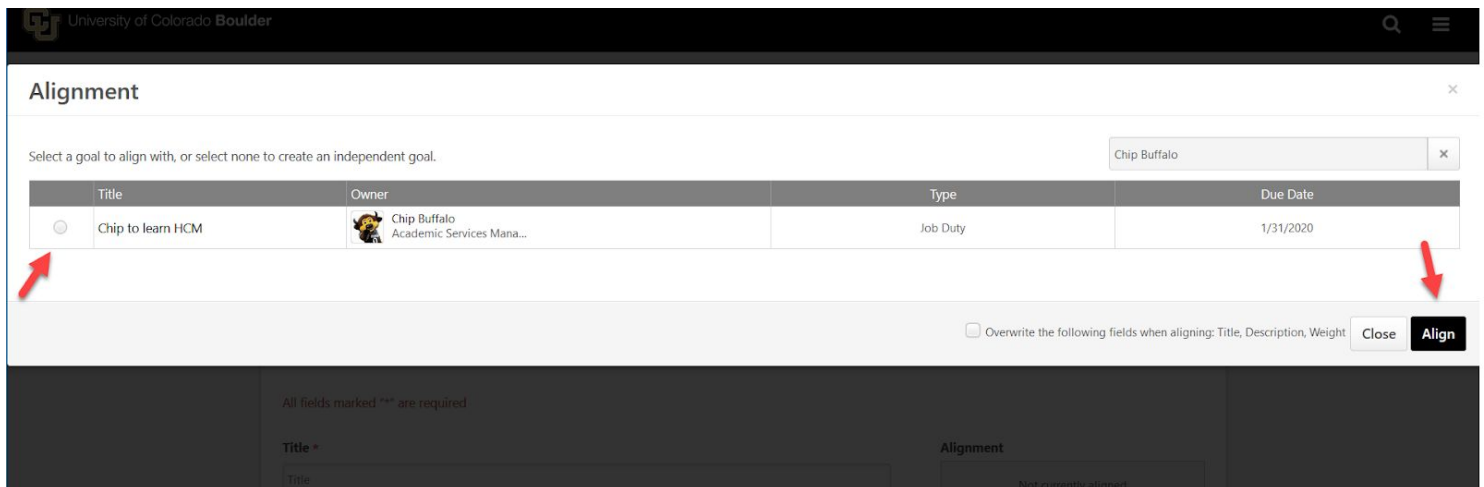
Title	Owner	Type	Due Date
<input type="radio"/> *Core Competency 1: Integrity/Responsibility/Ethics	Ralphie Buffalo Academic Services Director	University Staff Competency	1/31/2020
<input type="radio"/> *Core Competency 2: Inclusive Excellence	Ralphie Buffalo Academic Services Director	University Staff Competency	1/31/2020
<input type="radio"/> *Core Competency 3: Innovation	Ralphie Buffalo Academic Services Director	University Staff Competency	1/31/2020
<input type="radio"/> *Core Competency 4: Collaboration	Ralphie Buffalo Academic Services Director	University Staff Competency	1/31/2020
<input type="radio"/> *Core Competency 5: Communication	Ralphie Buffalo Academic Services Director	University Staff Competency	1/31/2020
<input type="radio"/> Project Goal For My Group	Ralphie Buffalo Academic Services Director	Goal	1/31/2020

☐ Overwrite the following fields when aligning: Title, Description, Weight

Close Align



- b. Select which goal(s) that you would like to align to by clicking the **circle** on the left side of the table



- c. To pull in the goal owner's title, description and weight into your goal click "**Overwrite Fields**" checkbox

Note: if you do not select "Overwrite Fields" you will have the option to create your own title, description and goal weight

6. Enter Start Date and Due Date for your goal. The start and due dates must fall within the performance cycle period. The performance cycle dates will automatically default in these fields.

For goals that will be assigned to both University and Classified staff, please use the default cycle dates of 4/1 - 1/31; as to not create goals that will not overlap multiple cycles.

Start Date **Due Date *** **Weight ***

4/1/2019 1/31/2020 0

7. For **Type** please select whether this is a “Goal” “Job Duty” or “Competency”

Type *

Select ▼

- ✓ Select
- Competency
- Goals
- Job Duties

8. Select at least one **University Imperative** that best embodies your goal, job duty, or competency. If none of the imperatives makes sense, select “Other”

University Imperative *

Select options ▼

- ☐ Select All
- ☐ *Be the Top University for Innovation
- ☐ *Positively Impact Humanity
- ☐ *Shape Tomorrow's Leaders
- ☐ Other

9. If applicable, add specific milestones for your goals under the **Tasks and Targets** section

💡 *Note: For classified staff, this is the same as measurement method*

Description

Align

B I U S Ix 1/2 1/3 1/4 1/5 1/6 1/7 1/8 1/9 1/10 1/11 1/12 1/13 1/14 1/15 1/16 1/17 1/18 1/19 1/20 1/21 1/22 1/23 1/24 1/25 1/26 1/27 1/28 1/29 1/30 1/31 1/32 1/33 1/34 1/35 1/36 1/37 1/38 1/39 1/40 1/41 1/42 1/43 1/44 1/45 1/46 1/47 1/48 1/49 1/50 1/51 1/52 1/53 1/54 1/55 1/56 1/57 1/58 1/59 1/60 1/61 1/62 1/63 1/64 1/65 1/66 1/67 1/68 1/69 1/70 1/71 1/72 1/73 1/74 1/75 1/76 1/77 1/78 1/79 1/80 1/81 1/82 1/83 1/84 1/85 1/86 1/87 1/88 1/89 1/90 1/91 1/92 1/93 1/94 1/95 1/96 1/97 1/98 1/99 1/100 1/101 1/102 1/103 1/104 1/105 1/106 1/107 1/108 1/109 1/110 1/111 1/112 1/113 1/114 1/115 1/116 1/117 1/118 1/119 1/120 1/121 1/122 1/123 1/124 1/125 1/126 1/127 1/128 1/129 1/130 1/131 1/132 1/133 1/134 1/135 1/136 1/137 1/138 1/139 1/140 1/141 1/142 1/143 1/144 1/145 1/146 1/147 1/148 1/149 1/150 1/151 1/152 1/153 1/154 1/155 1/156 1/157 1/158 1/159 1/160 1/161 1/162 1/163 1/164 1/165 1/166 1/167 1/168 1/169 1/170 1/171 1/172 1/173 1/174 1/175 1/176 1/177 1/178 1/179 1/180 1/181 1/182 1/183 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Add Tasks or Targets
×

Description

Start Date *

Due Date *

4/1/2019

1/31/2020

☐ Include Target

Type

Start Value

Target

Currency ▾

Start Value

Target

Cancel

Done

10. Attach any documents that support the goal, job duty, or competency

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

11. Select the **Visibility** box if you would like others to be able to align to this goal, either internal or external to your department.

! WARNING: Selecting this box allows anyone on campus to see and align to this goal

Visibility

☐ Allow other users to see and align

12. Assign the goal to members of your team by selecting the **“Your Team”** option and checking the box for the Employees you wish to assign the goal to.

Note: You may also assign the goal to each Employee’s direct and indirect reports by selecting the box in the right-hand column

Assignment *
Select which users or OU's this goal should be assigned to.

☐ Yourself ☒ Your team

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input type="checkbox"/>	Ralphie Buffalo	Academic Services Director	<input type="checkbox"/>
<input type="checkbox"/>	Chip Buffalo	Academic Services Manager	<input type="checkbox"/>

Options
☒ Create a separate goal for each user.

Cancel Save as Draft **Submit**

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13. Once you have finalized the goal, job duty, or competency click **Submit**. The goal, job duty or competency will be assigned to all members of your team selected in the “Assignment” section. You also have the option to save the goal as a draft without submitting.

*Note: If you save the goal as a draft, even if a Supervisor has assigned an Employee to the goal, the draft of this goal will appear under the “My Performance Plan” tab, not the “Team Performance Plan” tab. It will only show under “Team Performance Plan” tab once you click **Submit**.*

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Performance Plan My Performance Plan

My Performance Plan Create Options

Goals, Job Duties, Competencies

My Performance Plan Team Performance Plan

Current Period 4/1/2019 1/31/2020 Search

☐ Display Cancelled ☐ Hide Completed

Supervisor Goal Creation from Snapshot

Supervisors can also assign goals to their direct and indirect reports by using the Snapshot

1. Click “**Profile and Snapshot**” tile

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

On Wednesday, September 4, 2019 from 3:00 PM MDT to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the University's Strategic Imperatives.

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

August:
You and your supervisor will formally check-in for the mid-year evaluation check within Connecteam, and review your progress towards your plan. Feedback and comments should be made.

Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 1 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
test 2019-2020 Final Performance Evaluation for Chip Buffalo	9/2/2019
2019-2020 University Staff Final Performance Evaluation for Chip Buffalo	9/5/2019

2. Click **"View Team"**

3. Click on the name of the Employee that you wish to assign a new goal to

File Edit View History Bookmarks Tools Help

Universal Profile Bio - About - Real X

https://corporate1proxy-stg.csod.com/phnx/driver.aspx?routename=Social/UniversalProfile/Bio

View Team

return to Ralphie Buffalo

Chip Buffalo
Academic Services Manager

My Team

Search

Little Buffalo
Admin Assistant

Done

as Ralphie Buffalo

On Wednesday, September 4, 2019 from 3:00 PM MDT to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Actions

Snapshot

Ralphie Buffalo > Bio

Bio

Description for this tab displays here. This is *html friendly* and can be configured in the Universal Profile General Preferences.

Ralphie Buffalo
Academic Services Director
University Staff

About Resume

Email

Summary

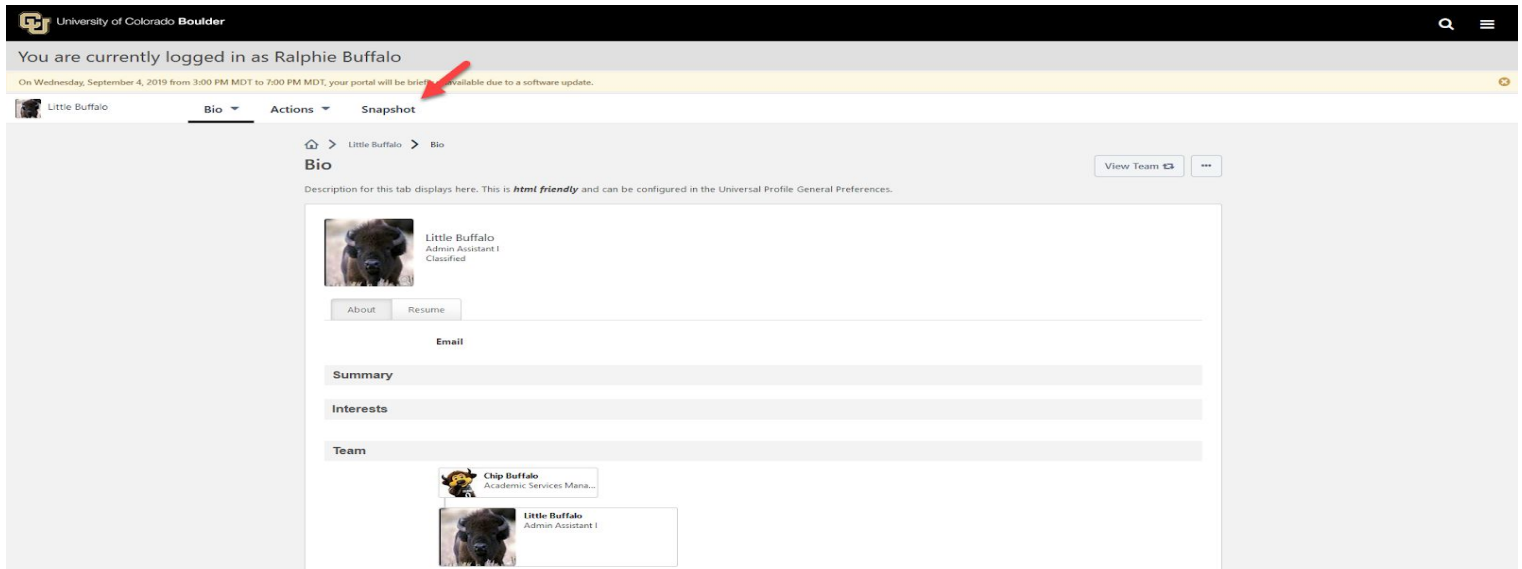
Interests

Team

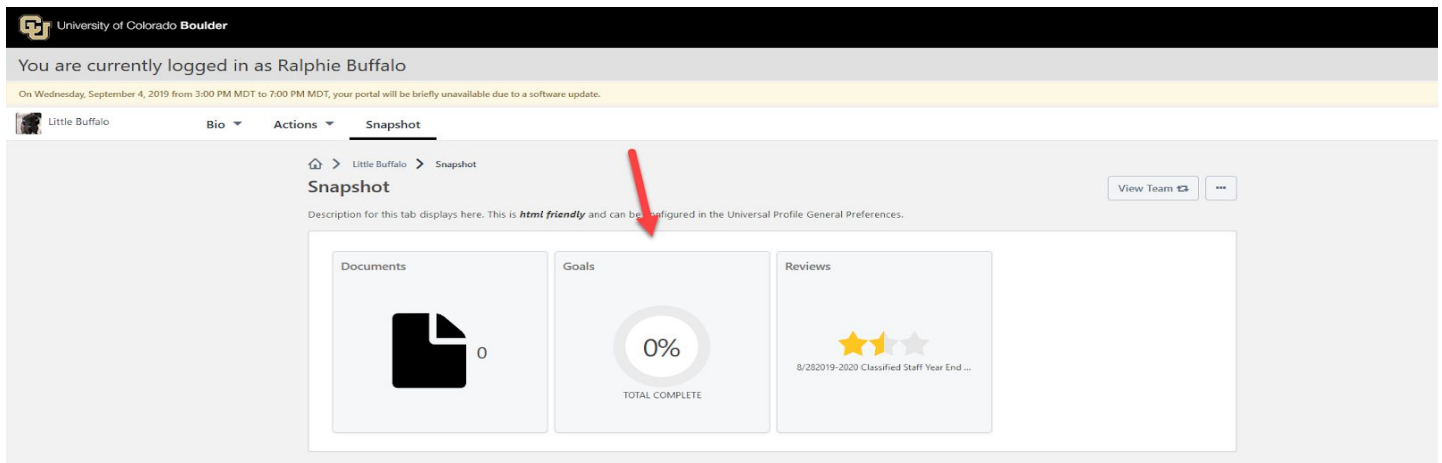
Ralphie Buffalo
Academic Services Director

View Team

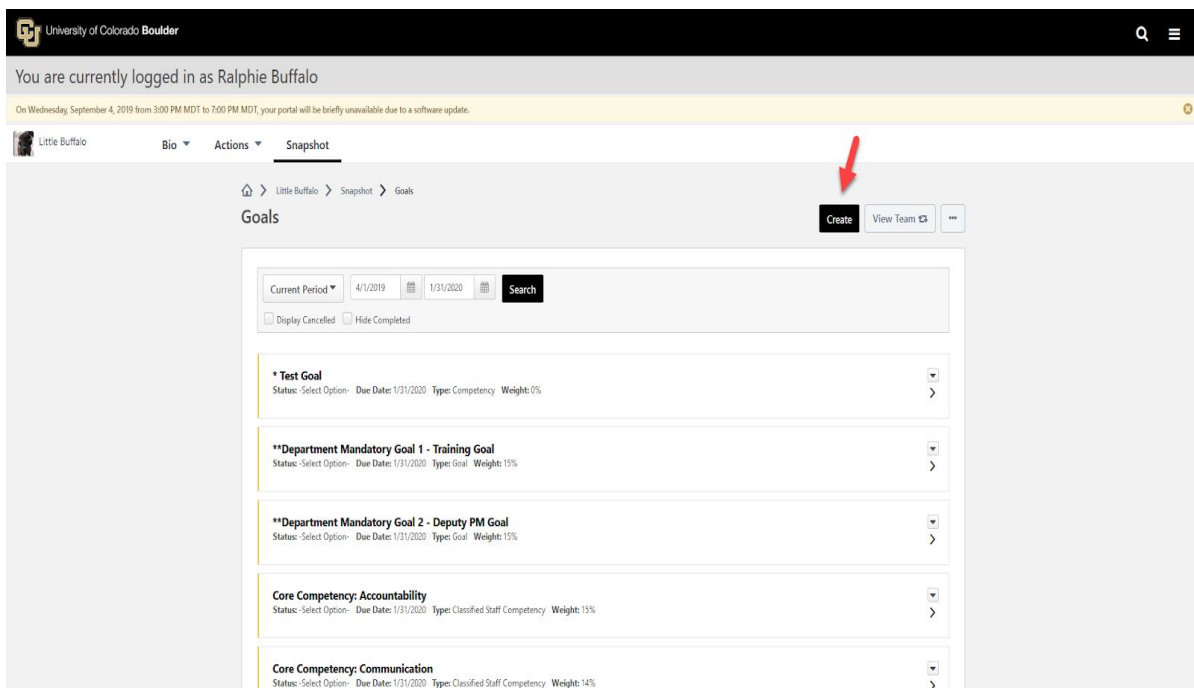
4. Click **"Snapshot"** in the header



5. Click “Goals”



6. Click “Create”



7. Goal creation page will display
Note: You will not see the “Assignment” button since the new goal is only for the Employee selected
Note: “Save as Draft” it will NOT save for an indirect report, only direct reports (Employees). If you are not ready to submit the goal for an indirect report, return to their Snapshot page at a later time.
8. In order to send the goal to a direct or indirect report, click **“Submit”**

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

On Wednesday, September 4, 2019 from 3:00 PM MDT to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Create Performance Plan

Wizard

Add goals, job duties, and competencies to your performance plan or create using the SMART Wizard.

Supervisors: When working on an employee's plan, each time an edit is submitted, the employee will be notified via email. You can avoid sending your employee multiple notifications by using the **Save as Draft** button while making changes on a plan.

Employees: When making changes to your plan, you can notify your supervisor via email of pending changes by clicking the **Send Approval Request** button on the My Performance Plan page.

It is recommended that any proposed changes made be discussed between employee and supervisor.

All fields marked "*" are required

Title *

Title

Description

B I U S T

Alignment

Not currently aligned

Align

Start Date

4/1/2019

Due Date *

1/31/2020

Weight *

0

Type *

Select

University Imperative *

Select options

Tasks and Targets

Add Tasks or Targets

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

Visibility

☒ Allow other users to see and align

Cancel Save as Draft Submit

Cornerstone

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Approving Goals Created by Employee

Each of your Employees will have access to create or add goals/job duties/competencies to their performance plan within Cornerstone. This process works in the same way as Supervisor goal creation with the exception that goals require Supervisor approval. Supervisors can see goals that are awaiting approval in the Inbox.

1. To access goals for approval, click on the **Approve Goals** link in the **“Inbox”** tile on your Home Page.

University of Colorado Boulder

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Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

August:
You and your supervisor will formally check-in for the mid-year coaching task, within Cornerstone, and review your progress towards your plan. Updates and comments should be made within Cornerstone during this formal check-in.

January:
You will be asked to review the progress that you made towards your plan over the past year and will have the option to comment. Your supervisor will be asked to do the same, and a final performance evaluation and rating will be assigned.

Ask Questions and Provide Cornerstone Feedback

The use of Cornerstone for performance management is new to CU Boulder, therefore, we request that you share your thoughts regarding your experiences with this solution. We will use your feedback to evolve our configuration of Cornerstone to ensure it is meeting the ongoing needs of our campus.

To provide feedback or request assistance with the Cornerstone tool, please fill out the [Cornerstone Help Form](#).

Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 4 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
2019-2020 Final Performance Evaluation for Chip Buffalo	9/30/2019
2019-2020 Final Performance Evaluation for Chip Buffalo	10/1/2019
Approve 2019-2020 Review for Little Buffalo	10/1/2019
Your 2019-2020 Mid-Year Coaching Session	10/9/2019
Your 2019-2020 Final Performance Evaluation	10/12/2019

Disclaimer

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- Goals that are pending approval from all of your Employees will display in the list for Pending Performance Plan and can be accessed via the **Approve/Deny** link on the far right. This link opens an editable version of the goal

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Pending Performance Plan

You may individually, or as a group, view, approve, or deny the Performance Plan.

☐ Include Performance Plan for inactive users

Select	User	Title	Status	Options
<input type="checkbox"/>	Chip Buffalo	*Core Competency 4: Collaboration	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Chip Buffalo	Chip to learn HCM	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Chip Buffalo	Field Study Reports	Pending Modification Approval	Approve/Deny
<input type="checkbox"/>	Chip Buffalo	New Goal for Planning Cycle	Pending Approval	Approve/Deny

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- Review the goal and make any necessary changes before selecting the individual goals and clicking **Approve Request** at the bottom of the screen

- You may deny goal changes by clicking **Deny Request**

Note: After a goal has been denied, it will appear in the Employee's Performance Plan with "Status: Denied" where it can either be edited by Employee and resubmitted or cancelled to be

removed from Performance Plan list.

5. If you are not yet ready to Approve or Deny the goal, click **Back** to exit out of that webpage

Completing the Goal Planning Task

Supervisor Steps

1. In the “**Tasks (Action Required)**” tile on your Home Page, click on **Performance Planning Checklist** for each of your Employees

*Note: Only 10 tasks will display. To access all tasks, locate and click on the **Hamburger** menu on the top right corner of the Home Page and select **Tasks***

University of Colorado Boulder

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August:

You and your supervisor will formally check-in for the mid-year coaching task, within Cornerstone, and review your progress towards your plan. Updates and comments should be made within Cornerstone during this formal check-in.

January:

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Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan:
(Your employees have 3 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
Approve 2019-2020 Review for Little Buffalo	9/17/2019
2019-2020 Performance Planning Checklist for Chip Buffalo	10/23/2019

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2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the “Overview” to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

Note: If you have not built goals for your Employees in Cornerstone, please do so before continuing to the next step in the Checklist task

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Performance Planning

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

Establishing individual employee goals, job duties, and competencies and aligning them with the University's Strategic Imperatives not only enhances performance, but also builds collaborative relationships between employees, teams, and their supervisors that are focused on using dialogue and feedback as developmental tools.

At the beginning of each performance cycle, supervisors and employees are responsible for developing a Performance Plan. While goals, job duties, and competencies should be created and documented within Cornerstone, they should also be discussed through ongoing face-to-face dialogue.

The goals, job duties, and competencies created within Cornerstone serve as a fluid representation of the performance plan. They can and should be edited throughout the plan cycle based on the changing needs of the employee and department. These goals, job duties, and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

Performance Planning Task: This task contains a checklist of items to review once initial performance planning has been completed for the plan year.

Review Step Progression



Supervisor Review

Due: 1/29/2020



Employee Acknowledgment



Get Started

4. "Performance Plan Review" requires you to examine the Performance Plan as it is currently written. In this step you are able to add, modify or cancel goals.
5. Once you have reviewed the Performance Plan and made any necessary changes, click **Save and Continue** to move on to the next step.

Note: If you are not yet ready to proceed, you may click Back or Save and Exit to exit the Review

You are currently logged in as Ralphie Buffalo

Overview


Performance Plan Revi...

Supervisor Goal Planni...

Supervisor Sign-Off

2019-2020 University Staff Performance Planning

Options ▾



Chip Buffalo
 Academic Services Manager
 2/1/2019 - 1/31/2020

0%

Performance Plan Review

Add Performance Plan

Goal #2

Ensuring that key and critical information is shared in a timely fashion. Developing and delivering information in multi modes that demonstrate the needs of different audiences.

Key Behaviors: More

Status: -Select Option-
 Start Date: 2/1/2019
 Due Date: 1/31/2020
 more...

Cancel Goal

Total Weight: 0%

Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.

Back

Save and Exit

Save and Continue

6. Review the "Supervisor Goal Planning Checklist" and use the checkboxes to indicate completion of the planning task
7. If you have completed all items on the checklist, click **Save and Continue** to move on to the next step
Note: If you have not completed goal planning or met with your Employee to discuss their Performance Plan, you may click Back or Save and Exit to exit the checklist task

University of Colorado **Boulder**

You are currently logged in as **Ralphie Buffalo**

Overview

Performance Plan Revi...

Supervisor Goal Planni...

Supervisor Sign-Off

2019-2020 University Staff Performance Planning
Options

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Supervisor Goal Planning Checklist

If you have not reviewed and created a performance plan in Cornerstone and discussed it with Chip Buffalo, please do so before completing this checklist.

Please note that the performance plan can and should be edited and updated throughout the plan cycle.

Consider alignment of the Performance Plan with the supervisor/department objectives

☐

Create goals, job duties, and competencies for the employee's Performance Plan

☐

Meet with your employee to discuss their Performance Plan

☐

Back

Save and Exit

Save and Continue

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8. "Supervisor Sign-Off" requires that you enter your first and last name and click **Sign**
9. If you are ready to submit the checklist and route it to your Employee for completion, click **Submit**
*Note: You may also click **Save and Exit** if you are not ready to route the task to your Employee*

University of Colorado **Boulder**

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Performance Planning

Options ▾

Overview
Performance Plan Revi...
Supervisor Goal Planni...
Supervisor Sign-Off

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

67%

Supervisor Sign-Off

Please provide an e-signature to confirm.

Supervisor
Ralphie Buffalo

Sign

Back Save and Exit **Submit**

Cornerstone

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10. "Submit Review" confirmation popup appears, click **Submit**

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel **Submit**

11. A confirmation page will display

University of Colorado **Boulder**

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Performance Planning

Options ▾

Overview
Performance Plan Revi...
Supervisor Goal Planni...
Supervisor Sign-Off

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

100%

You've completed this step in the Performance Planning Task.

The goals, job duties, and competencies created within Cornerstone serve as a fluid representation of the performance plan. They can and should be edited throughout the plan cycle based on the changing needs of the employee and department. These goals, job duties, and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

You may access performance plans in the My Performance Plan tile from the homepage or through the navigation menu.

Cornerstone

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12. Complete this process for all of your Employees

13. The task will move to the Employee's **"Tasks (Action Required)"** tile for their completion

Employee Steps

1. In the **"Tasks (Action Required)"** tile on your Home Page, click on **Performance Planning Checklist**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

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To provide feedback or request assistance with the Cornerstone tool, please fill out the [Cornerstone Help Form](#).

Tasks (Action Required)

	Due Date
2019-2020 Final Performance Evaluation for Little Buffalo	9/10/2019
My 2019-2020 Performance Planning Checklist	10/23/2019
2019-2020 Performance Planning Checklist for Little Buffalo	10/23/2019

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2. After opening the task, review the task steps on the left-hand side of the screen and read the "Overview" to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

You are currently logged in as Chip Buffalo

- Overview
- Performance Plan Revi...
- University Staff Goal Pl...
- Employee Acknowledg...

2019-2020 University Staff Performance Planning

Options



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

Establishing individual employee goals, job duties, and competencies and aligning them with the University's Strategic Imperatives not only enhances performance, but also builds collaborative relationships between employees, teams, and their supervisors that are focused on using dialogue and feedback as developmental tools.

At the beginning of each performance cycle, supervisors and employees are responsible for developing a Performance Plan. While goals, job duties, and competencies should be created and documented within Cornerstone, they should also be discussed through ongoing face-to-face dialogue.

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Performance Planning Task: This task contains a checklist of items to review once initial performance planning has been completed for the plan year.

Review Step Progression



Supervisor Review



Employee Acknowledgment

Due: 1/30/2020



Get Started

- Review the "University Staff Goal Planning Checklist" and use the checkboxes to indicate completion of the planning tasks
- If you have completed all items on the checklist, click **Save and Continue** to move on to the next step

*Note: If you need to return to the task at a later time, click **Save and Exit***

You are currently logged in as Chip Buffalo

- Overview
- Performance Plan Review
- University Staff Goal Planning
- Employee Acknowledgment

2019-2020 University Staff Performance Planning

Options



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Performance Plan Review

Add Performance Plan

Goal #2

Ensuring that key and critical information is shared in a timely fashion. Developing and delivering information in multi modes that demonstrate the needs of different audiences.

Key Behaviors: More

Status: - Select Option -

Start Date: 2/1/2019

Due Date: 1/31/2020

more...

Cancel Goal

Total Weight: 0%

Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.

Back

Save and Exit

Save and Continue

University of Colorado **Boulder**

You are currently logged in as Chip Buffalo

Overview

Performance Plan Revi...

University Staff Goal PL...

Employee Acknowledg...

2019-2020 University Staff Performance Planning
Options

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

University Staff Goal Planning Checklist

The following checklist should be reviewed once initial performance planning has been completed for the year. If you have not reviewed and created a Performance Plan in Cornerstone and discussed it with your supervisor, please do so before completing this checklist.

Please note that the Performance Plan can and should be edited and updated throughout the plan cycle.

Meet with your supervisor to discuss your Performance Plan

☐

Review the Performance Plan created by your supervisor

☐

Edit your Performance Plan accordingly

☐


Back

Save and Exit

Save and Continue

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6. To acknowledge that you have reviewed the Performance Plan with your Supervisor, provide your e-signature by entering your first and last name in the Acknowledgement box and click **Sign**
*Note: If you need to return to the task at a later time, click **Save and Exit***
7. Click **Submit** once signature has been applied


 University of Colorado **Boulder**


Q


≡

You are currently logged in as Chip Buffalo

 Overview


 Performance Plan Revi...

 University Staff Goal Pl...

 Employee Acknowledg...

2019-2020 University Staff Performance Planning

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

67%

Employee Acknowledgment

Employees: Please provide an e-signature to confirm that you have reviewed with your supervisor.


Acknowledgment

Sign

Back

Save and Exit

Submit

 Cornerstone


javascriptvoid(0)

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8. A confirmation page will display. **Task is complete!**

2019-2020 University Staff Performance Planning

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

100%

You've completed this step in the Performance Planning Task.

The goals, job duties, and competencies created within Cornerstone serve as a fluid representation of the performance plan. They can and should be edited throughout the plan cycle based on the changing needs of the employee and department. These goals, job duties, and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

You may access performance plans in the **My Performance Plan** tile from the homepage or through the navigation menu.

Completing the Mid Year Coaching Session Task

Supervisor Steps

1. In the “**Tasks (Action Required)**” tile on your Home Page, click on **University Staff Mid Year Coaching Session** for each of your Employees

*Note: Only 10 tasks will display. To access all tasks, locate and click on the **Hamburger** menu on the top right corner of the Home Page and select **Tasks***

University of Colorado Boulder

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Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 4 Performance Plan pending approval)

Tasks (Action Required)

	Date Due
2019-2020 University Staff Mid-Year Coaching Session for Chip Buffalo	10/2/2019

2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the “Overview” to become familiar with the steps in the coaching session and why they matter
3. Click **Get Started**

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Mid-Year Coaching Options ▾

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

Coaching Sessions

A coaching session is essential to the performance management process and is required to be held in addition to any periodic informal feedback sessions. Coaching sessions provide a formal opportunity to review and update the Performance Plan. Navigate to **My Performance Plan** and review all current goals, job duties, and competencies. This task contains a checklist of items to review as part of the coaching session.

Review Step Progression

✓	Supervisor Review Due: 10/2/2019	✓
✓	Employee Acknowledgment	✓

Get Started

Cornerstone

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4. “Performance Plan Review” displays all previously created goals, job duties and competencies

5. Enter any necessary coaching related comments for each of the items
*Note: If you need to return to the task at a later time, click **Save and Exit***
6. Click **Save and Continue** to proceed to the next step

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Mid-Year Coaching

Options ▾

Overview
Performance Plan Review
Supervisor Coaching Session Questions
Supervisor Sign-Off

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Performance Plan Review

Add Performance Plan

*Core Competency 1: Integrity/Responsibility/Ethics

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. [More](#)

Status: Completed
Start Date: 2/1/2019
Due Date: 1/31/2020
[more...](#)

Cancel Goal

Total Weight: 0%
Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.
* Indicates a shared goal.

Back Save and Exit **Save and Continue**

Cornerstone

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7. Review the “Supervisor Coaching Session Questions” and use the checkboxes to indicate completion of the coaching questions
Note: Only proceed from this point if you have already met with your Employee for a coaching session, or if you are actively in a coaching session with the Employee during this task completion
8. Once you have completed and checked all items, click **Save and Continue**
*Note: If at any time you need to return to this checklist at a later time, click **Back** or **Save and Exit** to exit the checklist task*

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Mid-Year Coaching

Options ▾

Overview
Performance Plan Review
Supervisor Coaching Session Questions
Supervisor Sign-Off

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Supervisor Coaching Session Questions

Navigate to the My Performance Plan page and review all current goals, job duties, and competencies. Check the box to indicate the steps that have been completed.

Review and update goals, job duties, and competencies
☒

Review alignment to supervisor/department objectives
☒

Review and update Performance Plan progress
☒

Back Save and Exit **Save and Continue**

Cornerstone

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9. "Supervisor Sign-Off" requires that you enter your first and last name and click **Sign**
 10. If you are ready to submit the checklist and route it to your Employee for completion, click **Submit**
- Note: If you are not ready to route the Task to your Employee, click **Save and Exit***

The screenshot shows the '2019-2020 University Staff Mid-Year Coaching' interface. On the left, a sidebar lists steps: Overview, Performance Plan Review, Supervisor Coaching Summary, and Supervisor Sign-Off (which is active). The main content area shows a progress bar at 67% and a section for 'Supervisor Sign-Off'. It prompts the user to 'Please provide an e-signature to confirm.' Below this, there is a text input field for the supervisor's name, which contains 'Ralphie Buffalo'. To the right of the input field is a black button labeled 'Sign', with a red arrow pointing to it. At the bottom right of the form are three buttons: 'Back', 'Save and Exit', and 'Submit', with a red arrow pointing to the 'Submit' button. The footer includes the Cornerstone logo and text: 'Powered by Cornerstone OnDemand, Inc. ©2000-2019 All Rights Reserved. Terms - Privacy - Cookies - Feedback'.

11. "Submit Review" confirmation popup appears, click **Submit**

The screenshot shows a 'Submit Review' confirmation popup. The title bar says 'Submit Review' with a close button (X) in the top right corner. The main text reads: 'You will not be able to modify once you have submitted. Are you sure that you want to submit now?'. At the bottom right, there are two buttons: a light gray 'Cancel' button and a black 'Submit' button.

12. A confirmation page will display

Overview

Performance Plan Rev...

Supervisor Coaching ...

Supervisor Sign-Off

2019-2020 University Staff Mid-Year Coaching

Options ▾

Chip Buffalo
 Academic Services Manager
 2/1/2019 - 1/31/2020

100%

You've completed the coaching session task.

13. Complete this process for all of your Employees

14. The task will move to the Employee's **"Tasks (Action Required)"** tile for their completion

Employee Steps

1. In the **"Tasks (Action Required)"** tile on your Home Page, click on **Your Mid Year Coaching Session**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Planning

Profile & Snapshot

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

- An initial planning exercise
- A formal coaching check-in between supervisors and employees to review plan progress
- Recommended quarterly check-in coaching sessions
- A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the University's Strategic Imperatives.

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Inbox

No Items

Tasks (Action Required)

Your 2019-2020 Mid-Year Coaching Session

Due Date: 9/10/2019

2. After opening the task, review the task steps on the left-hand side of the screen and read the "Overview" to become familiar with the steps in the coaching session and why they matter

3. Click **Get Started**

38

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
Performance Plan Review
Employee Coaching Session
Employee Acknowledgment

2019-2020 University Staff Mid-Year Coaching

Options

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

Coaching Sessions
A coaching session is essential to the performance management process and is required to be held in addition to any periodic informal feedback sessions. Coaching sessions provide a formal opportunity to review and update the Performance Plan. Navigate to **My Performance Plan** and review all current goals, job duties, and competencies. This task contains a checklist of items to review as part of the coaching session.

Review Step Progression

Supervisor Review

Employee Acknowledgment
Due: 9/18/2019

Get Started

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4. "Performance Plan Review" will display all previously created goals, job duties and competencies
5. Click **Save and Continue**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
Performance Plan Review
Employee Coaching Session
Employee Acknowledgment

2019-2020 University Staff Mid-Year Coaching

Options

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Performance Plan Review

Add Performance Plan

***Core Competency 1: Integrity/Responsibility/Ethics**

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. **More**

Status: Completed
Start Date: 2/1/2019
Due Date: 1/31/2020
more...

Cancel Goal

Total Weight: 0%
Please adjust individual goal weight percentages so total weight percentage equals 100%. Shared goals cannot be modified. Only newly created and approved goal weight percentage changes will be reflected in the total.
* indicates a shared goal.

Back Save and Exit **Save and Continue**

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6. Review the "Mid Year Coaching Session Checklist" and use the checkboxes to indicate completion of the coaching tasks
7. If you have completed all items on the checklist, click **Save and Continue** to move on to the next step
*Note: If at anytime you need to return to this checklist at a later time, click **Back** or **Save and Exit** to exit the checklist task*

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
Performance Plan Review
Employee Coaching Session
Employee Acknowledgment

2019-2020 University Staff Mid-Year Coaching

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Employee Coaching Session Questions

Navigate to the My Performance Plan page and review all current goals, job duties, and competencies. This task contains a checklist of items to review as part of the coaching session. Check the box to indicate the steps that have been completed.

Review and update goals, job duties, and competencies	<input checked="" type="checkbox"/>
Review alignment to your supervisor/department objectives	<input checked="" type="checkbox"/>
Review and update your Performance Plan progress	<input checked="" type="checkbox"/>

Back Save and Exit **Save and Continue**

Cornerstone

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8. To acknowledge that you have had a coaching session with your Supervisor, provide your e-signature by entering your first and last name in the Acknowledgement box and click **Sign** for the Employee Sign-Off
9. Click **Submit** once signature has been applied

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
Performance Plan Review
Employee Coaching Session
Employee Acknowledgment

2019-2020 University Staff Mid-Year Coaching

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

67%

Employee Acknowledgment

Employees: Please provide an e-signature to confirm that you have reviewed with your supervisor.

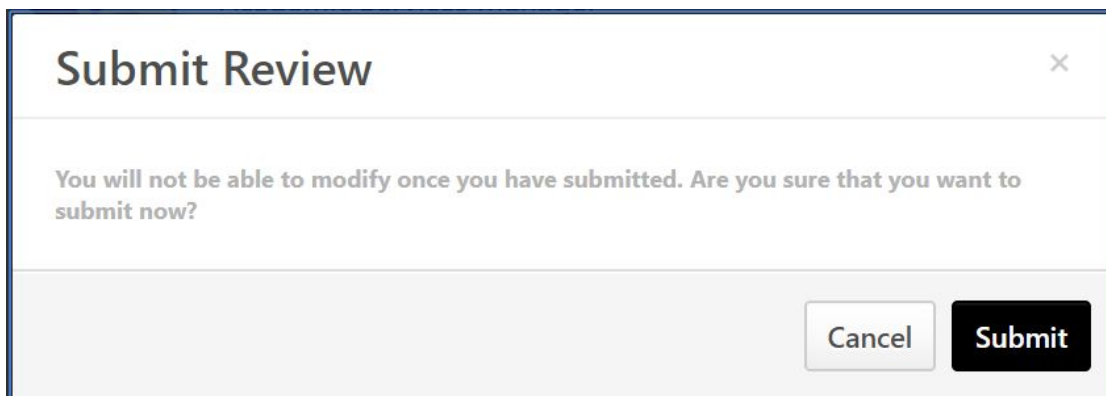
Acknowledgment
Chip Buffalo **Sign**

Back Save and Exit **Submit**

Cornerstone

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All Rights Reserved. Terms Privacy Cookies Feedback

10. "Submit Review" confirmation popup appears, click **Submit**

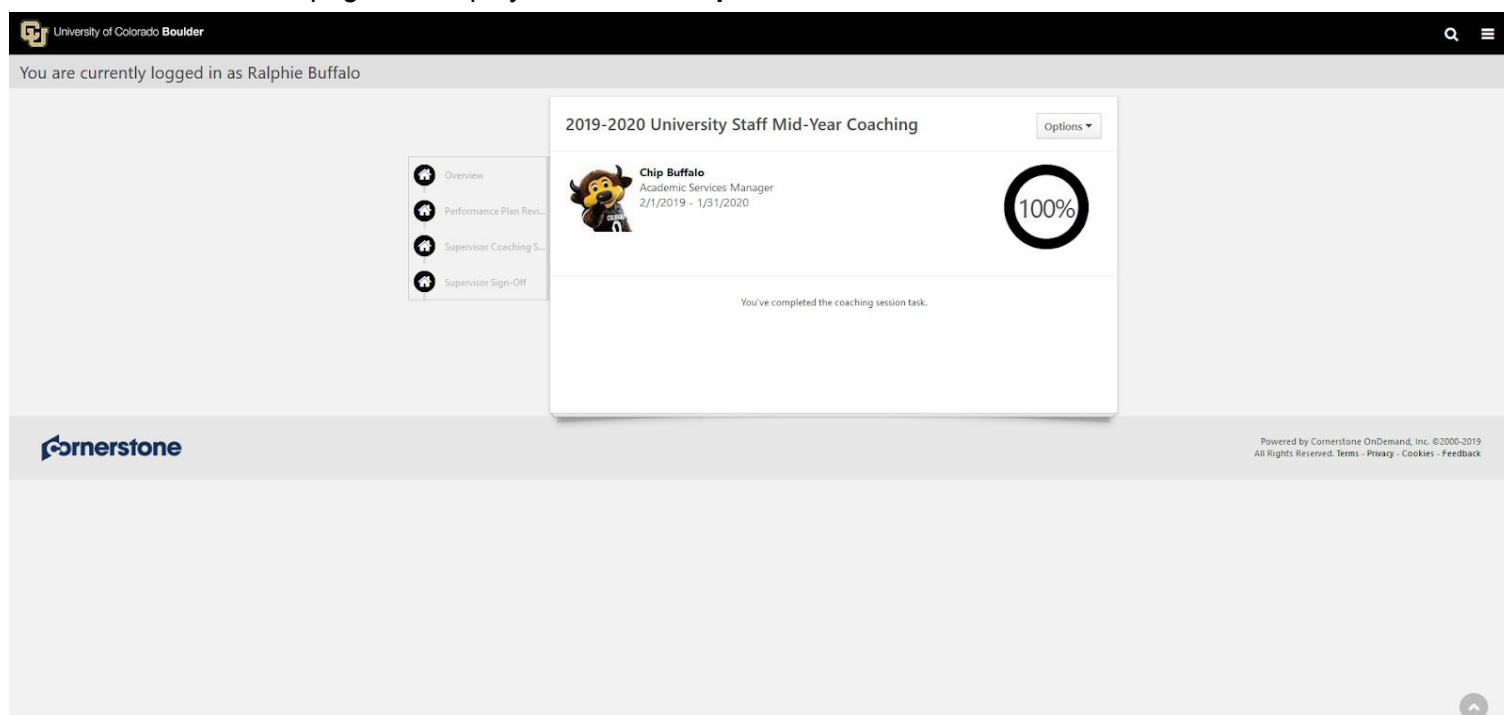


Submit Review ✕

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel Submit

9. A confirmation page will display. **Task is complete!**



University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

2019-2020 University Staff Mid-Year Coaching Options ▾

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

100%

You've completed the coaching session task.

Overview
Performance Plan Review
Supervisor Coaching Session
Supervisor Sign-Off

cornerstone

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Completing a Mid Year Closeout Evaluation

If an Employee is transferring positions, leaving the University, or if there is a change in Supervisor; a close out evaluation should be completed for the Employee prior to the official data change entry in HCM. Once the entry is completed in HCM, the Supervisor will lose access to the Employee in Cornerstone. Cornerstone will not generate any Tasks or Notifications when a change such as this occurs. It is highly suggested that the Supervisor take proactive steps prior to the data entry change in HCM.

Supervisor Steps

Option 1: Final Comments within the Individual Goals and Suggested Ratings

1. Supervisor may make final assessment comments within the comment section of each goal assigned to the Employee. A Supervisor may also make a comment with a suggested performance rating for each goal. These comments will be visible to the Employee and the new Supervisor. This will allow the new Supervisor to include them in their final performance assessment at the end of the performance cycle.

File Edit View History Bookmarks Tools Help

Welcome - Realize Your Potential: × +

https://lax-sl5proxy.csod.com/LMS/catalog/Welcome.aspx?tab_page_id=-67&tab_id=-1 90% Search

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 5 Performance Plan pending approval)

Tasks (Action Required)

No Current Tasks in Progress

File Edit View History Bookmarks Tools Help

My Goals - Realize Your Potential: × +

https://lax-sl5proxy.csod.com/phnx/driver.aspx?routename=Goals/GoalList#loaded 80% Search

My Performance Plan

***Core Competency 1: Integrity/Responsibility/Ethics**
Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

Status: In Progress

Description: *Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.*
[View Background](#) [read more](#)

Start Date: 2/1/2019
University Imperative: University Values & Colorado Creed

Attachments

[Choose File](#)
Upload up to 3 attachments. Maximum upload 1mb

Comments

[Add Comment](#)

[Close](#)

***Core Competency 2: Inclusive Excellence**
Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

***Core Competency 3: Innovation**
Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

***Core Competency 4: Collaboration**
Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

- Remember to add comments for each goal where you want to include a final comment before the Employee's official effective date changes in HCM.

File Edit View History Bookmarks Tools Help

My Goals - Realize Your Potential: x

https://lax-sl5proxy.csod.com/phnx/driver.aspx?routename=Goals/GoalList#loaded

Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

***Core Competency 2: Inclusive Excellence**

Status: In Progress Due Date: 1/31/2020 Type: University Staff Competency Weight: 0%

Status: In Progress

Description: *Demonstrating excellence through diversity by creating a welcoming and inclusive environment that maximizes the success and inclusion of all students, staff, and faculty.*

Start Date: 2/1/2019

University Imperatives: University Values & Colorado Creed

Attachments

Choose File

Upload up to 1 attachments. Maximum upload 1mb

Comments

comment

Cancel Add

Close

Option 2: Final Overall Summary and Final Suggested Overall Score

1. If a Supervisor would rather provide an overall performance assessment with a suggested score, a Supervisor could compose a summary on a word document and upload it into the documents section within the Snapshot profile of the Employee.

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

On Wednesday, September 4, 2019 from 3:00 PM MDT to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February/March:
You and your supervisor will work together to define expectations aligned with the University's Strategic Imperatives.

April/July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

August:
You and your supervisor will formally check-in for the mid-year coaching talk within Connect@CU, and discuss your progress towards your plan. Updates and comments should be made.

Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 1 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
test 2019-2020 Final Performance Evaluation for Chip Buffalo	9/2/2019
2019-2020 University Staff Final Performance Evaluation for Chip Buffalo	9/9/2019

File Edit View History Bookmarks Tools Help

Universal Profile Bio - About - Real x +

https://corporate1.proxy-stg.csod.com/phnx/driver.aspx?routename=Social/UniversalProfile/Bio& 80% Search

View Team

< return to Ralphie Buffalo

Chip Buffalo
Academic Services Manager

My Team

Search

Little Buffalo
Admin Assistant I

Done

as Ralphie Buffalo

to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Actions Snapshot

> Ralphie Buffalo > Bio

Bio

Description for this tab displays here. This is **html friendly** and can be configured in the Universal Profile General Preferences.

Ralphie Buffalo
Academic Services Director
University Staff

About Resume

Email

Summary

Interests

Team

Ralphie Buffalo
Academic Services Director

University of Colorado Boulder

You are currently logged in as **Ralphie Buffalo**

On Wednesday, September 4, 2019 from 3:00 PM MDT to 7:00 PM MDT, your portal will be briefly unavailable due to a software update.

Little Buffalo

Bio Actions Snapshot

> Little Buffalo > Bio

Bio

Description for this tab displays here. This is **html friendly** and can be configured in the Universal Profile General Preferences.

Little Buffalo
Admin Assistant I
Classified

About Resume

Email

Summary

Interests

Team

Chip Buffalo
Academic Services Mana...

Little Buffalo
Admin Assistant I

File Edit View History Bookmarks Tools Help

Universal Profile - Snapshot - Realize Your Potential: colorado

https://lax-sl5proxy.csod.com/phnx/driver.aspx?routename=Social/UniversalProfile/Snapshot&Ta

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Little Buffalo Bio Actions Snapshot

Snapshot

Description for this tab displays here. This is **html friendly** and can be configured in the Universal Profile General Preferences.

Documents Goals Reviews

0

0%
TOTAL COMPLETE

No rating available

View Team

File Edit View History Bookmarks Tools Help

Realize Your Potential: colorado

https://lax-sl5proxy.csod.com/phnx/driver.aspx?routename=Social/UniversalProfile/Snapshot/Do

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Chip Buffalo Bio Actions Snapshot Documents

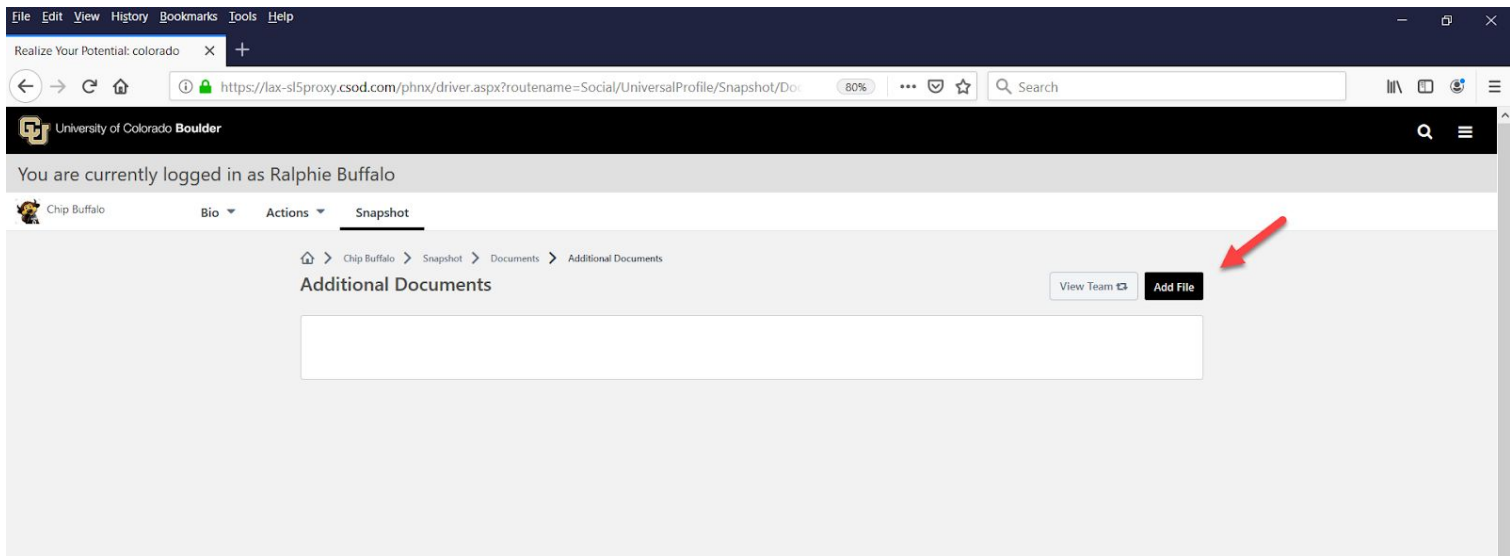
Documents

View Team

Search documents and folders by title

Additional Documents

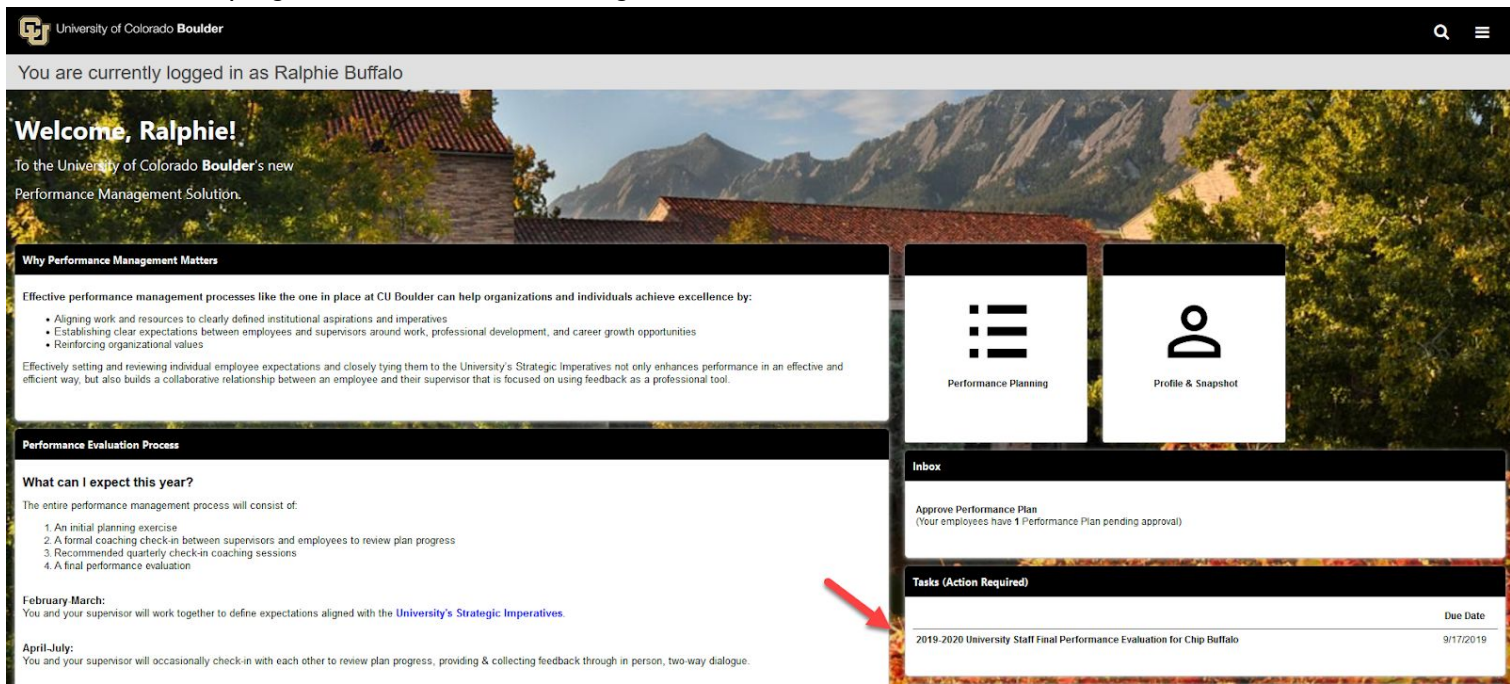
Files: 0



Completing University Staff Year End Evaluation Task

Supervisor Steps

1. In the **“Tasks (Action Required)”** tile on your Home Page, click on **University Staff Final Performance Evaluation** for each of your Employees
*Note: Only 10 tasks will display. To access all tasks, locate and click on the **Hamburger** menu on the top right corner of the Home Page and select **Tasks***



2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the **“Overview”** to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

You are currently logged in as Ralphie Buffalo

- Overview
- University Staff Ratings
- Final Departmental Ra...
- Supervisor Final Sign...

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "options" dropdown in the upper-right corner.

Review Step Progression



Get Started

- Review the "University Staff Ratings"
- Click **Select** to select a Rating for each goal. (The overall rating will be added in a later step)
- Enter Comments for each goal, job duty or competency
- If you are ready route the Evaluation to your Employee for their review, click **Submit**
*Note: If you are not ready to complete this portion, you may click **Back** or **Save and Exit** to exit the task*

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options

Overview
University Staff Ratings
Final Departmental Ra...
Supervisor Final Sign...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

University Staff Ratings

Supervisors: Please review and rate Chip Buffalo's performance for each goal, job duty, and competency, and provide comments for the employee if necessary. An overall narrative can also be added when giving the final departmental rating.

Employees: Please review goals, job duties, competencies, and comments left by your manager and leave any necessary feedback. Click Submit to proceed to the next step in the final evaluation process. The Save and Exit button will allow you to return to the review but you will not advance to the next step until you click submit.

***Core Competency 1: Integrity/Responsibility/Ethics**

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. [more...](#)

Status: Completed
Start Date: 2/1/2019
Due Date: 1/31/2020
[more...](#)

Select

Comments:

Rich text editor toolbar: Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Font, Size, Undo, Redo.

Buttons: Back, Save and Exit, **Submit**

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8. "Submit Review" confirmation popup appears, click **Submit**

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

CancelSubmit

9. A confirmation page will display

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options

Overview

University Staff Ratings

Final Departmental Ra...

Supervisor Final Sign...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

100%

Thank you for completing this step in the final performance evaluation.

Cornerstone

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10. Complete this process for all of your Employees

Employee Steps

1. In the “Tasks (Action Required)” tile on your Home Page, click on **Your Final Performance Evaluation**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
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- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the University's Strategic Imperatives.

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Performance Planning

Profile & Snapshot

Inbox

No Items

Tasks (Action Required)

Your 2019-2020 Final Performance Evaluation

Due Date
9/17/2019

2. After opening the task, review the task steps on the left hand side of the screen and read the “Overview” to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 University Staff Year End Evaluation

Options ▾

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "options" dropdown in the upper-right corner.

Review Step Progression

✓	Supervisor Review	✓
✓	Employee Review Due: 9/17/2019	✓
✓	Supervisor Final Departmental Rating and Sign Off	✓
✓	Employee Acknowledgment	✓

Get Started

Cornerstone

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4. Review the "University Staff Ratings" page which includes each goal, job duty and competency in your Performance Plan as well as Comments from your Supervisor
5. Leave any necessary feedback in the comments boxes
6. Click **Submit**
7. You may also click **Save and Exit** if you need to resume the task at a later time

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 University Staff Year End Evaluation

Options

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

University Staff Ratings

Supervisors: Please review and rate Chip Buffalo's performance for each goal, job duty, and competency, and provide comments for the employee if necessary. An overall narrative can also be added when giving the final departmental rating.

Employees: Please review goals, job duties, competencies, and comments left by your manager and leave any necessary feedbacks. Click Submit to proceed to the next step in the final evaluation process. The Save and Exit button will allow you to return to the review but you will not advance to the next step until you click submit.

*Core Competency 1: Integrity/Responsibility/Ethics

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. [more...](#)

Status: Completed
Start Date: 2/1/2019
Due Date: 1/31/2020
[more...](#)

Comments:

Ralphie Buffalo (Manager) Rated: 5 - 5 - Outstanding Review: 2019-2020 University Staff Year End Evaluation Time: 9/11/2019 9:50 AM

Back Save and Exit **Submit**

Cornerstone

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8. "Submit Review" confirmation popup appears, click **Submit**

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel **Submit**

9. Confirmation page appears, your comments and feedback have been submitted to your Supervisor for review


University of Colorado Boulder

You are currently logged in as Chip Buffalo

- Overview
- University Staff Ratings
- Final Departmental Ra...
- Employee Acknowled...

2019-2020 University Staff Year End Evaluation

Options ▾



Chip Buffalo
 Academic Services Manager
 2/1/2019 - 1/31/2020

100%

Thank you for completing this step in the final performance evaluation.

Cornerstone

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Supervisor Steps

1. In the **“Tasks (Action Required)”** tile on your Home Page, click on **Final Performance Evaluation** for each of your Employees

Note: Only 10 tasks will display. To access all tasks, navigate to the “hamburger” menu on the top right corner of the Home Page

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!


To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters


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Performance Planning



Profile & Snapshot

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

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4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Inbox

Approve Performance Plan
(Your employees have 1 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
2019-2020 University Staff Final Performance Evaluation for Chip Buffalo	9/17/2019

2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the “Overview” to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

You are currently logged in as Ralphie Buffalo

Overview


University Staff Ratings

Final Departmental Ra...

Supervisor Final Sign...

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "options" dropdown in the upper-right corner.

Review Step Progression

✓

Supervisor Review

✓

✓

Employee Review

✓

✓

Supervisor Final Departmental Rating and Sign Off

Due: 12/25/2019

✓

✓

Employee Acknowledgment

✓

Reopen Step

Get Started

4. Review the "University Staff Ratings" page which includes all comments from your Employee
5. Edit and/or confirm all your previously entered comments and add any additional comments as necessary
6. Click **Save and Continue**

*Note: You may also click **Save and Exit** if you need to resume the task at a later time*

You are currently logged in as Ralphie Buffalo

- Overview
- University Staff Ratings
- Final Departmental Ra...
- Supervisor Final Sign...

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

[Options](#)

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

0%

University Staff Ratings

Supervisors: Please review and rate Chip Buffalo's performance for each goal, job duty, and competency, and provide comments for the employee if necessary. An overall narrative can also be added when giving the final departmental rating.

Employees: Please review goals, job duties, competencies, and comments left by your manager and leave any necessary feedback. Click Submit to proceed to the next step in the final evaluation process. The Save and Exit button will allow you to return to the review but you will not advance to the next step until you click submit.

*Core Competency 1: Integrity/Responsibility/Ethics

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. [more...](#)

Status: Completed

Start Date: 2/1/2019

Due Date: 1/31/2020

[more...](#)

4 - Exceeding Exp... *

Comments:

B I U S x₂ x² I_x Font Size

[Back](#)[Save and Exit](#)[Save and Continue](#)

7. "Final Departmental Rating" requires the selection of Overall Rating and any additional comments
8. Click **Save and Continue**

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options

Overview

University Staff Ratings

Final Departmental Ra...

Supervisor Final Sign...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Final Departmental Rating

Supervisors: Please provide an **overall performance rating** for **Chip Buffalo**.

Weighted Average Score: If your department uses goal weighting in determining the final score, you have the option to view weighted average scores of your direct reports by running the [Performance Review Rating Report](#).

Note: After this task is completed you can still access your employee's weighted average scores by navigating under the hamburger menu to Reports > Standard Reports > Performance Review Rating Report.

Employees: Your overall performance rating will display below.

Overall Rating:

Choose rating

Optional evaluation narrative may be provided below:

Back Save and Exit **Save and Continue**

Cornerstone

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9. "Supervisor Final Sign-Off" includes information regarding Performance Calibration
Note: The use of calibration should be applied consistency within a unit; if it is done for one Employee, it should be done for all Employees within a unit
10. Once you have reviewed the Performance Calibration summary enter your first and last name into the text box and click **Sign**
11. If you are ready to submit the Final Evaluation to your Employee for completion, click **Submit**
*Note: You may also click **Save and Exit** if you are not ready to route the Final Evaluation to your Employee*

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options

Overview
University Staff Ratings
Final Departmental Ra...
Supervisor Final Sign-Off

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

67%

Supervisor Final Sign-Off

Performance Calibration: Is a two-step process that includes supervisors who are responsible for conducting the performance evaluations and the reviewer who examines the employee evaluations. The calibration process provides a forum for discussion of employee's performance with the goal of making sure supervisors apply similar standards for all employees and eliminate biases to the greatest extent possible.

If your department participates in the performance calibration process, please do not click "Submit" until you have engaged in the calibration process with your departmental leadership.

In an effort to prepare for the performance calibration meeting, please run the following report: [Performance Review Rating Report](#). Select this task and check all "Review Section" boxes that appear as well as "In-Progress Task."

- This will allow you to view the University Staff Rating, which is an optional weighted average score of all the goals.
- This report will also provide you with the Final Departmental Rating based on supervisor discretion, that you selected in the previous step.
- If the University Staff Rating and Final Departmental Rating are out of sync you will need to present the business justification for this discrepancy at the calibration meeting.

Once you are ready to provide your employee with the Final Departmental Rating, insert an e-signature to confirm and submit.

Supervisor

First and last name

Sign

Back Save and Exit Submit

Cornerstone

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12. "Submit Review" confirmation popup appears, click **Submit**

Submit Review ×

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel Submit

13. Confirmation page appears, the Final Evaluation has been sent to your Employee for Final Employee Acknowledgement

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

VIDEO-DEMO-2019-2020 University Staff Year End Evaluation

Options

Overview

University Staff Ratings

Final Departmental Ra...

Supervisor Final Sign...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

100%

Thank you for completing this step in the final performance evaluation.

cornerstone

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Employee Steps

1. In the “Tasks (Action Required)” tile on your Home Page, click on **Your Final Performance Evaluation**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Performance Planning

Profile & Snapshot

Inbox

No Items

Tasks (Action Required)

	Due Date
Your 2019-2020 Final Performance Evaluation	9/17/2019

2. After opening the task, review the task steps on the left hand side of the screen and read the “Overview” to become familiar with the steps in the planning process and why they matter
3. Click **Get Started**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
University Staff Ratings
Final Departmental Ra...
Employee Acknowled...

2019-2020 University Staff Year End Evaluation

Options ▾

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "options" dropdown in the upper-right corner.

Review Step Progression

✓ Supervisor Review ✓

✓ Employee Review ✓

✓ Supervisor Final Departmental Rating and Sign Off ✓

✓ Employee Acknowledgment ✓
Date: 9/17/2019

Get Started

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- Review the "University Staff Ratings" page which includes each goal, job duty and competency in your Performance Plan as well as Comments from your Supervisor
- Click **Next**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
University Staff Ratings
Final Departmental Ra...
Employee Acknowled...

2019-2020 University Staff Year End Evaluation

Options ▾

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

University Staff Ratings

Supervisors: Please review and rate Chip Buffalo's performance for each goal, job duty, and competency, and provide comments for the employee if necessary. An overall narrative can also be added when giving the final departmental rating.

Employees: Please review goals, job duties, competencies, and comments left by your manager and leave any necessary feedback. Click Submit to proceed to the next step in the final evaluation process. The Save and Exit button will allow you to return to the review but you will not advance to the next step until you click submit.

***Core Competency 1: Integrity/Responsibility/Ethics**

Gaining the confidence and trust of others through honesty, authenticity, and acceptance of responsibility.

Key Behaviors:

- Accepts responsibility that comes with working in the interest of the public good. [more...](#)

Status: Completed
Start Date: 2/1/2019
Due Date: 1/31/2020
[more...](#)

Ralphie Buffalo (Manager) Rated: 5 - 5 - Outstanding Review: 2019-2020 University Staff Year End Evaluation Time: 9/11/2019 9:50 AM

Back Exit **Next**

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- "Final Departmental Rating" appears and includes any final comments from your Supervisor
- Enter any comments relating to the Final Overall Rating here
- Click **Save and Continue**

Note: You may also click **Save and Exit** if you are not ready to continue

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 University Staff Year End Evaluation

Options

Overview
University Staff Ratings
Final Departmental Ra...
Employee Acknowled...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

33%

Final Departmental Rating

Weighted Average Score: If your department uses goal weighting in determining the final score, you have the option to view weighted average scores of your direct reports by running the [Performance Review Rating Report](#). Please provide an overall performance rating for Chip Buffalo.

Overall Rating:

Optional evaluation narrative may be provided below:

Ralphie Buffalo (Manager) Rated: 5 - 5 - Outstanding Review: 2019-2020 University Staff Year End Evaluation Time: 9/11/2019 10:21 AM

Back Save and Exit Save and Continue

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- To acknowledge that you have reviewed the Final Performance Evaluation including Rating and Comments, provide your e-signature by entering your first and last name in the Acknowledgement box and click **Sign** for the Employee Sign-Off
- Click **Submit** once signature has been applied

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 University Staff Year End Evaluation

Options

Overview
University Staff Ratings
Final Departmental Ra...
Employee Acknowled...

Chip Buffalo
Academic Services Manager
2/1/2019 - 1/31/2020

67%

Employee Acknowledgment

Employees: Please provide an e-signature to confirm that you have reviewed with your supervisor.

Acknowledgment
Chip Buffalo

Sign

Back Save and Exit Submit

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- Your University Staff Year End Evaluation report populates for review and saving!

Completing Classified Staff Year End Evaluation

Supervisor Steps

1. In the “**Tasks (Action Required)**” tile on your Home Page, click on **Final Performance Evaluation** for each of your Employees

*Note: Only 10 tasks will display. To access all tasks, locate and click on the **Hamburger** menu on the top right corner of the Home Page and select **Tasks***

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Tasks (Action Required)

	Due Date
2019-2020 Final Performance Evaluation for Little Buffalo	9/17/2019

2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the “Overview” to become familiar with the steps in the evaluation process and why they matter
3. Click **Get Started** to move on to the next step in the task

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Overview

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "option" dropdown in the upper-right corner.

Review Step Progression

Supervisor Review ☒ Due: 10/1/2019 ☒

Reviewer Sign Off ☒

Employee Acknowledgment ☒ Supervisor Sign Off ☒

Get Started

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4. Assign weight % and select a rating and enter comments for each goal, job duty or competency
Note: all goals, job duties and competencies will be on one page
5. Click **Save and Continue** to proceed on to step 6 to review the Summary of Classified Goal Rating

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Classified Goal Rating

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Classified Goal Rating

Supervisors: Please review, weight, and rate Little Buffalo's performance for each goal, and provide comments where necessary. Once the Appointing Authority/Reviewer has reviewed the Performance Plan, meet with the employee before signing off on the year-end evaluation.

Reviewers: Please review the supervisor's comments, weights, and ratings to ensure alignment. Any suggested revisions should be made as a comment for the supervisor, and the re-open button should be used to send the task back to the supervisor.

Employees: Please review your year-end performance evaluation with your supervisor, provide any comments to your supervisor, and prepare for an in-person meeting with your supervisor to discuss your year-end evaluation. Once this meeting has occurred, log back into Cornerstone and sign the acknowledge page.

* Test Goal

test

Status: -Select Option-

Start Date: 2/1/2019

Due Date: 1/31/2020

more...

Weight: 0 %

Level 3 - Exceed... ▾

Comments:

Save and Continue

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6. Enter optional final narrative

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

33%

Classified Supervisor Narrative

Optional: Provide a narrative of Little Buffalo's performance for this cycle.

Narrative:

Comments:

B I U S x x² I_x **Font** **Size** **A** **Image**

Back Save and Exit **Save and Continue**

Cornerstone

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7. Review the "Summary" of Overall Rating
8. *Note: Overall rating is displayed in decimals. Ex: 2.71 = 271 on the Classified Rating Scale*
9. Click **Next**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

67%

Overview
Classified Goal Rating
Classified Supervisor N...
Summary
Supervisor Acknowled...

Summary

Overall Rating ⓘ
Level 2 - Meeting Expectations (1.81-2.70)

	Supervisor Review
Classified Goal Rating	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)
Classified Supervisor Narrative	N/A
Overall ⓘ	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)

Back Next

Cornerstone

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10. Enter your first and last name and click **Sign** for “Supervisor Acknowledgement”
11. Click **Submit**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

50%

Overview
Classified Goal Rating
Summary
Supervisor Acknowled...
Classified Year-End Ev...
Supervisor Sign-Off

Supervisor Acknowledgment

Please sign below to acknowledge you have reviewed the employee's final performance evaluation and final ratings before submitting to the next step for Reviewer approval.

Once the Reviewer approves the final rating, the Classified Staff Year End Evaluation task and final rating will be sent to you and your employee simultaneously for final signatures.

Supervisor
Chip Buffalo

Sign

Back Save and Exit Submit

Cornerstone

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12. “Submit Review” confirmation popup appears, click **Submit**
Note: once submitted you cannot modify!

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel
Submit

13. A confirmation page will display

14. Final Evaluation has now been sent to the assigned Reviewer (Second Level Supervisor) for their review

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview
 Classified Goal Rating
 Summary
 Classified Year-End Evaluation
 Supervisor Sign-Off

2019-2020 Classified Staff Year End Evaluation

Little Buffalo
 Admin Assistant I
 4/1/2019 - 3/31/2020

Thank you for completing this step in the final performance evaluation.

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Reviewer Steps

1. In the “**Tasks (Action Required)**” tile on your Home Page, click on **Approve Review** for each Employee

Note: Only 10 tasks will display. To access all tasks, navigate to the “hamburger” menu on the top right corner of the Home Page

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
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Performance Evaluation Process

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3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Performance Planning

Profile & Snapshot

Inbox

Approve Performance Plan
(Your employees have 1 Performance Plan pending approval)

Tasks (Action Required)

	Due Date
Approve 2019 2020 Review for Little Buffalo	9/17/2019

2. After opening the task for a given Employee, review the task steps on the left-hand side of the screen and read the "Overview" to become familiar with the steps in the evaluation process and why they matter
3. Click **Get Started** to move on to the next step in the task

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Overview

Classified Goal Rating

Summary

Reviewer Sign Off

2019-2020 Classified Staff Year End Evaluation

Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part the year end review, be sure to upload those documents as attachments to the task as well by clicking the "option" dropdown in the upper-right corner.

Review Step Progression

Supervisor Review

Reviewer Sign Off
Date: 9/17/2019

Employee Acknowledgment

Supervisor Sign Off

Reopen Step **Get Started**

Cornerstone

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4. Review ratings, weights and comments
Note: all goals, job duties and competencies will be on one page
5. Click **Save and Continue**

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Overview

Classified Goal Rating

Summary

Reviewer Sign Off

2019-2020 Classified Staff Year End Evaluation
Options

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Classified Goal Rating

Supervisors: Please review, weight, and rate Little Buffalo's performance for each goal, and provide comments where necessary. Once the Appointing Authority/Reviewer has reviewed the Performance Plan, meet with the employee before signing off on the year-end evaluation.

Reviewers: Please review the supervisor's comments, weights, and ratings to ensure alignment. Any suggested revisions should be made as a comment for the supervisor, and the re-open button should be used to send the task back to the supervisor.

Employee: Please review your year-end performance evaluation with your supervisor, provide any comments to your supervisor, and prepare for an in-person meeting with your supervisor to discuss your year-end evaluation. Once this meeting has occurred, log back into Cornerstone and sign the acknowledge page.

* Test Goal

test

Status: -Select Option-

Start Date: 2/1/2019

Due Date: 1/31/2020

more...

Weight: 0 %

Chip Buffalo (Manager) Rated: 3 - Level 3 - Exceeding Expectations (2.71-3.00) Review: 2019-2020 Classified Staff Year End Evaluation Time: 9/11/2019 3:02 PM

Back Save and Exit Save and Continue

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6. View Supervisor final narrative if applicable

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

Overview

Classified Goal Rating

Classified Supervisor Narrative

Summary

Reviewer Sign Off

2019-2020 Classified Staff Year End Evaluation
Options

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

33%

Classified Supervisor Narrative

Optional: Provide a narrative of Little Buffalo's performance for this cycle.

Narrative:

Chip Buffalo (Manager) Review: 2019-2020 Classified Staff Year End Evaluation Time: 2/25/2020 1:49 PM

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. A scelerisque purus semper eget dui at tellus. Commodo quis imperdiet massa tincidunt. Elit ullamcorper dignissim cras tincidunt lobortis feugiat vivamus at augue. Eu sem integer vitae justo eget magna fermentum. A arcu cursus vitae congue mauris rhoncus aenean vel. Vivamus at augue eget arcu dictum. Fermentum posuere urna nec tincidunt praesent semper feugiat nibh sed. Sed odio morbi quis commodo odio. Habitasse platea dictumst vestibulum rhoncus est. Sapien faucibus et molestie ac feugiat sed. Aliquam purus sit amet luctus venenatis lectus magna. Mattis ullamcorper velit sed ullamcorper morbi. Sed turpis tincidunt id aliquet. Nunc sed augue lacus viverra vitae congue eu consequat ac. Nec dui nunc mattis enim ut. Vehicula ipsum a arcu cursus vitae congue mauris.

Iaculis urna id volutpat lacus laoreet non curabitur gravida. Iaculis eu non diam phasellus vestibulum lorem sed risus. Ornare arcu odio ut sem nulla. Nulla porttitor massa id neque aliquam. Arcu bibendum at varius vel pharetra vel turpis. Lectus quam id leo in vitae. Massa id neque aliquam vestibulum morbi blandit cursus risus at. Id venenatis a condimentum vitae. Sed augue lacus viverra vitae congue eu consequat ac. Nunc vel risus commodo viverra maecenas accumsan lacus. Consectetur adipiscing elit pellentesque habitant. Duis at consectetur lorem donec massa sapien faucibus et molestie. Orci ac auctor augue mauris. Et malesuada fames ac turpis. Feugiat nibh sed pulvinar proin. Feugiat sed lectus vestibulum mattis ullamcorper velit sed ullamcorper. Pharetra magna ac placerat vestibulum lectus mauris. Vitae turpis massa sed elementum tempus egestas.

Volutpat commodo sed egestas egestas fringilla. Sem integer vitae justo eget magna fermentum iaculis eu non. Posuere urna nec tincidunt praesent semper feugiat nibh sed pulvinar. A lacus vestibulum sed arcu non odio euismod. Egestas erat imperdiet sed euismod nisi porta lorem. Velit aliquet sagittis id consectetur purus ut faucibus pulvinar. Congue nisi vitae suscipit tellus mauris a diam. Ultrices neque ornare aenean euismod. Nunc sed blandit libero volutpat sed cras. Id venenatis a condimentum vitae sapien pellentesque.

Less

Back Save and Exit Save and Continue

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7. Review Overall Rating

Note: Overall rating is displayed in decimals. Ex: 2.71 = 271 on the Classified Rating Scale

8. Click **Next**

The screenshot shows the 'Summary' page of the '2019-2020 Classified Staff Year End Evaluation' for 'Little Buffalo', an Admin Assistant I. The progress bar indicates 67% completion. The left sidebar shows the navigation menu with 'Reviewer Sign Off' as the next step. The main content area displays the 'Overall Rating' as 'Level 2 - Meeting Expectations (1.81-2.70)'. A table titled 'Supervisor Review' shows the following data:

	Supervisor Review
Classified Goal Rating	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)
Classified Supervisor Narrative	N/A
Overall	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)

At the bottom right, there are 'Back' and 'Next' buttons. The footer includes the Cornerstone logo and copyright information for Cornerstone OnDemand, Inc. ©2000-2020.

9. If you are ready to sign-off, enter your first and last name and click **Sign** for Reviewer Sign-Off

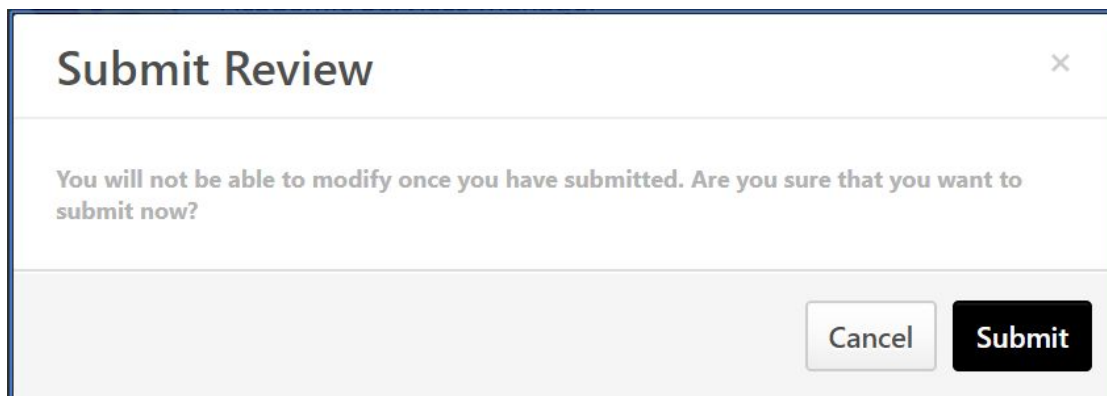
10. If Reviewer agrees with overall evaluation click **Submit**

11. ****SEE STEPS 15-17 for process if Reviewer disagrees with any aspect of the evaluation**

The screenshot shows the 'Reviewer Sign Off' page. The progress bar indicates 50% completion. The left sidebar shows 'Reviewer Sign Off' as the current step. The main content area contains instructions for signing off and a form with a text input field for the reviewer's name (pre-filled with 'Ralphie Buffalo') and a 'Sign' button. Below the form are 'Back', 'Save and Exit', and 'Submit' buttons. Red arrows point to the 'Sign' and 'Submit' buttons. The footer includes the Cornerstone logo and copyright information for Cornerstone OnDemand, Inc. ©2000-2019.

12. Submit Review Confirmation window will appear

****Note, once submitted you cannot modify!**



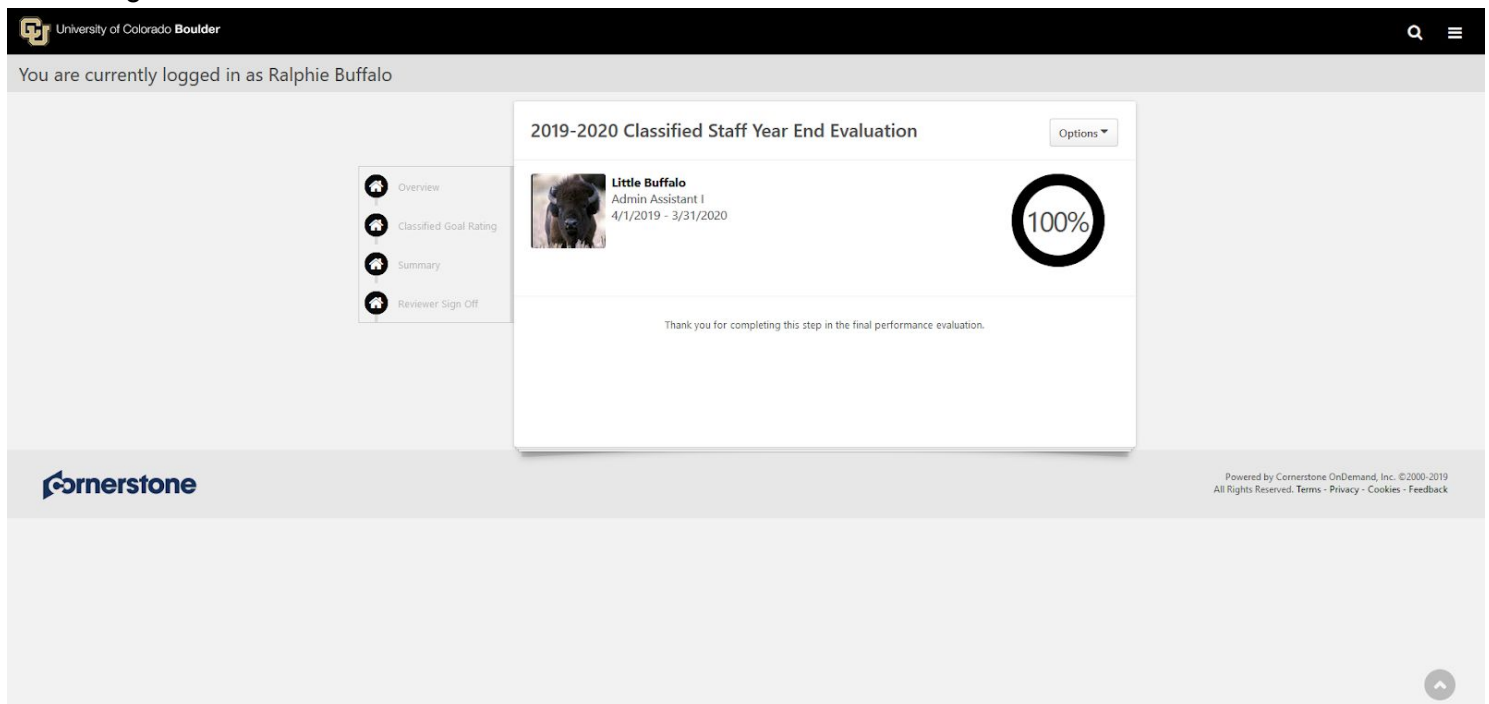
Submit Review ✕

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

13. Click **Submit**

14. A confirmation page will display

15. Final Evaluation has now been sent to the Employee as well as the Supervisor **concurrently** for final Sign-Off



University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

2019-2020 Classified Staff Year End Evaluation Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

100%

Thank you for completing this step in the final performance evaluation.

Overview
Classified Goal Rating
Summary
Reviewer Sign Off

cornerstone

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16. If Reviewer disagrees with overall evaluation, click **Overview** in the menu on the upper left side of the screen

17. Overview page appears, click **Reopen Step**

18. Add necessary corresponding instructions on items of disagreement and click **Save** to send back to Supervisor for edits

19. Supervisor will receive an email notification that the step has been re-opened and can make changes to the evaluation to re-submit

Supervisor Steps

1. Once Reviewer has signed and submitted, Supervisor should schedule and hold the performance review meeting with the Employee
2. After performance review meeting with Employee has occurred, complete the task
3. In the **"Tasks (Action Required)"** tile on your Home Page, click on **Final Performance Evaluation** for each of your Employees.

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Welcome, Chip!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:
You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

Performance Planning

Profile & Snapshot

Inbox

No Items

Tasks (Action Required)

	Due Date
2019-2020 Final Performance Evaluation for Little Buffalo	9/18/2019

- Review the task steps on the left-hand side of the screen and read the "Overview" to become familiar with the steps in the evaluation process and why they matter
- Click **Get Started** to move on to the next step in the task

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part of the year end review, be sure to upload those documents as attachments to the task as well by clicking the "option" dropdown in the upper-right corner.

Review Step Progression

✓

Supervisor Review

✓

✓

Reviewer Sign Off

✓

✓

Employee Acknowledgment

✓

Supervisor Sign Off

Due: 9/18/2019

✓

Reopen Step **Get Started**

Cornerstone

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- Review the evaluation in it's entirety
Note: All goals, job duties and competencies will be on one page
- Click **Save and Continue**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Overview
Classified Goal Rating
Classified Year-End Evaluation
Summary
Supervisor Sign-Off

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Classified Goal Rating

Supervisors: Please review, weight, and rate Little Buffalo's performance for each goal, and provide comments where necessary. Once the Appointing Authority/Reviewer has reviewed the Performance Plan, meet with the employee before signing off on the year-end evaluation.

Reviewers: Please review the supervisor's comments, weights, and ratings to ensure alignment. Any suggested revisions should be made as a comment for the supervisor, and the re-open button should be used to send the task back to the supervisor.

Employee: Please review your year-end performance evaluation with your supervisor, provide any comments to your supervisor, and prepare for an in-person meeting with your supervisor to discuss your year-end evaluation. Once this meeting has occurred, log back into Cornerstone and sign the acknowledge page.

* Test Goal

test

Status: -Select Option-

Start Date: 2/1/2019

Due Date: 1/31/2020

more...

Weight: 0 %

Level 3 - Exceedin...

Chip Buffalo (Manager) Rated: 3 - Level 3 - Exceeding Expectations (2.71-3.00) Review: 2019-2020 Classified Staff Year End Evaluation Time: 9/11/2019 3:02 PM

Back Save and Exit **Save and Continue**

Cornerstone

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8. "Classified Year-End Evaluation Meeting" page required that you certify you have met with the Employee to review the evaluation, click the **checkbox**
9. Click **Save and Continue**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Options ▾

Overview
Classified Goal Rating
Classified Year-End Evaluation
Summary
Supervisor Sign-Off

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

33%

Classified Year-End Evaluation Meeting

I certify that I have met with the employee to review their final evaluation

☒

Back Save and Exit **Save and Continue**

Cornerstone

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10. Final review of "Summary" with overall goal rating score displays
Note: Overall rating is displayed in decimals. Ex: 2.71 = 271 on the Classified Rating Scale

11. Click **Next**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Overview
Classified Goal Rating
Classified Year-End Evaluation
Summary
Supervisor Sign-Off

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

67%

Summary

Overall Rating
Level 3 - Exceeding Expectations (2.71-3.00)

	Supervisor Review
Classified Goal Rating	3.00/3.00 Level 3 - Exceeding Expectations (2.71-3.00)
Overall	3.00/3.00 Level 3 - Exceeding Expectations (2.71-3.00)

Back Next

Cornerstone

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12. Enter your first and last name and click **Sign** for “Supervisor Sign-Off”

13. Click **Submit**

University of Colorado Boulder

You are currently logged in as Chip Buffalo

2019-2020 Classified Staff Year End Evaluation

Overview
Classified Goal Rating
Classified Year-End Evaluation
Summary
Supervisor Sign-Off

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

67%

Supervisor Sign-Off

Please provide an e-signature to confirm.

Supervisor
Chip Buffalo

Sign

Back Save and Exit Submit

Cornerstone

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14. “Submit Review” confirmation popup appears, click **Submit**

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel
Submit

15. A confirmation page will display

University of Colorado Boulder

You are currently logged in as Chip Buffalo

Overview

Classified Goal Rating

Summary

Classified Year-End Evaluation

Supervisor Sign-Off

2019-2020 Classified Staff Year End Evaluation

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

Thank you for completing this step in the final performance evaluation.

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Employee Steps

1. In the “**Tasks (Action Required)**” tile on your Home Page, click on **Your Final Performance Evaluation**

University of Colorado Boulder

You are currently logged in as Little Buffalo

Welcome, Little!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.

Performance Evaluation Process

What can I expect from the Performance Planning Cycle?

The entire performance management process will consist of:

1. An initial planning exercise
2. A mandatory formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

April:
You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

June-August:
You and your supervisor will occasionally check-in with each other and review plan progress, providing feedback through in person, two-way dialogue.

October:

Performance Planning

Profile & Snapshot

Inbox

No Items

Tasks (Action Required)

	Due Date
Your 2019-2020 Final Performance Evaluation	9/18/2019

2. After opening the task, review the task steps on the left hand side of the screen and read the "Overview" to become familiar with the steps in the planning process and why they matter
3. Click **Get Started** to move on to the next steps

University of Colorado Boulder

You are currently logged in as Little Buffalo

Overview

Classified Goal Rating

Summary

Employee Acknowledg...

2019-2020 Classified Staff Year End Evaluation

Options ▾

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Overview

The purpose of the performance evaluation is to provide the employee with substantive feedback about achieving the goals, job duties, competencies that the supervisor established in the employee's Performance Plan in the beginning of the performance cycle. The evaluation forms the basis for the overall performance rating and is a consideration for any merit increase. Additionally, the evaluation can be used to plan employee development over the coming year.

If your department uses any offline processes as part of the year end review, be sure to upload those documents as attachments to the task as well by clicking the "option" dropdown in the upper-right corner.

Review Step Progression

Supervisor Review

Reviewer Sign Off

Employee Acknowledgment
Date: 9/18/2019

Supervisor Sign Off

Get Started

4. Review the ratings, weights and comments submitted by your Supervisor
Note: All goals, job duties and competencies will be on one page
5. Click **Save and Continue** to move on to the next step

You are currently logged in as Little Buffalo

Overview


Classified Goal Rating

Summary

Employee Acknowledg...

2019-2020 Classified Staff Year End Evaluation

Options



Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

0%

Classified Goal Rating

Supervisors: Please review, weight, and rate Little Buffalo's performance for each goal, and provide comments where necessary. Once the Appointing Authority/Reviewer has reviewed the Performance Plan, meet with the employee before signing off on the year-end evaluation.

Reviewers: Please review the supervisor's comments, weights, and ratings to ensure alignment. Any suggested revisions should be made as a comment for the supervisor, and the re-open button should be used to send the task back to the supervisor.

Employee: Please review your year-end performance evaluation with your supervisor, provide any comments to your supervisor, and prepare for an in-person meeting with your supervisor to discuss your year-end evaluation. Once this meeting has occurred, log back into Cornerstone and sign the acknowledge page.

* Test Goal

test


Status: -Select Option-

Start Date: 2/1/2019

Due Date: 1/31/2020

more...

Weight: 0 %

 **Chip Buffalo** (Manager) Rated: 3 - Level 3 - Exceeding Expectations (2.71-3.00) Review: 2019-2020 Classified Staff Year End Evaluation Time: 9/11/2019 3:02 PM

Back

Save and Exit

Save and Continue

6. Review supervisor final narrative

University of Colorado Boulder

You are currently logged in as Little Buffalo

Overview

Classified Goal Rating

Classified Supervisor N...

Summary

Employee Acknowledg...

2019-2020 Classified Staff Year End Evaluation
Options

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

33%

Classified Supervisor Narrative

Optional: Provide a narrative of Little Buffalo's performance for this cycle.

Narrative:

Chip Buffalo (Manager) Review: 2019-2020 Classified Staff Year End Evaluation Time: 2/25/2020 1:49 PM

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. A scelerisque purus semper eget duis at tellus. Commodo quis imperdiet massa tincidunt. Elit ullamcorper dignissim cras tincidunt lobortis feugiat vivamus at augue. Eu sem integer vitae justo eget magna fermentum. A arcu cursus vitae congue mauris rhoncus aenean vel. Vivamus at augue eget arcu dictum. Fermentum posuere urna nec tincidunt praesent semper feugiat nibh sed. Sed odio morbi quis commodo odio. Habitasse platea dictumst vestibulum rhoncus est. Sapien faucibus et molestie ac feugiat sed. Aliquam purus sit amet luctus venenatis lectus magna. Mattis ullamcorper velit sed ullamcorper morbi. Sed turpis tincidunt id aliquet. Nunc sed augue lacus viverra vitae congue eu consequat ac. Nec dui nunc mattis enim ut. Vehicula ipsum a arcu cursus vitae congue mauris.
laculis urna id volutpat lacus laoreet non curabitur gravida. laculis eu non diam phasellus vestibulum lorem sed risus. Ornare arcu odio ut sem nulla. Nulla porttitor massa id neque aliquam. Arcu bibendum at varius vel pharetra vel turpis. Lectus quam id leo in vitae. Massa id neque aliquam vestibulum morbi blandit cursus risus at. Id venenatis a condimentum vitae. Sed augue lacus viverra vitae congue eu consequat ac. Nunc vel risus commodo viverra maecenas accumsan lacus. Consectetur adipiscing elit pellentesque habitant. Duis at consectetur lorem donec massa sapien faucibus et molestie. Orci ac auctor augue mauris. Et malesuada fames ac turpis. Feugiat nibh sed pulvinar proin. Feugiat sed lectus vestibulum mattis ullamcorper velit sed ullamcorper. Pharetra magna ac placerat vestibulum lectus mauris. Vitae turpis massa sed elementum tempus egestas.
Volutpat commodo sed egestas egestas fringilla. Sem integer vitae justo eget magna fermentum laculis eu non. Posuere urna nec tincidunt praesent semper feugiat nibh sed pulvinar. A lacus vestibulum sed arcu non odio euismod. Egestas erat imperdiet sed euismod nisi porta lorem. Velit aliquet sagittis id consectetur purus ut faucibus pulvinar. Congue nisi vitae suscipit tellus mauris a diam. Ultrices neque ornare aenean euismod. Nunc sed blandit libero volutpat sed cras. Id venenatis a condimentum vitae sapien pellentesque.

Back Save and Exit Save and Continue

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7. Review summary and overall goal rating score
Note: Overall rating is displayed in decimals. Ex: 2.71 = 271 on the Classified Rating Scale
8. Click **Next**

University of Colorado Boulder

You are currently logged in as Little Buffalo

Overview

Classified Goal Rating

Classified Supervisor N...

Summary

Employee Acknowledg...

2019-2020 Classified Staff Year End Evaluation
Options

Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020

67%

Summary

	Supervisor Review
Classified Goal Rating	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)
Classified Supervisor Narrative	N/A
Overall	2.18/3.00 Level 2 - Meeting Expectations (1.81-2.70)

Back Next

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9. To acknowledge that you have reviewed the final evaluation, provide your e-signature by entering your first and last name in the Acknowledgement box and click **Sign** for the Employee Sign-Off
10. Click **Submit**

The screenshot shows the '2019-2020 Classified Staff Year End Evaluation' form for 'Little Buffalo', an Admin Assistant I, with a period from 4/1/2019 to 3/31/2020. A progress indicator shows 50% completion. On the left, a sidebar lists steps: Overview, Classified Goal Rating, Summary, and Employee Acknowledgment (the current step). The 'Employee Acknowledgment' section asks the employee to provide an e-signature. It includes a text box with 'Little Buffalo' and a 'Sign' button, which is highlighted with a red arrow. At the bottom right, there are 'Back', 'Save and Exit', and 'Submit' buttons, with the 'Submit' button also highlighted by a red arrow. The footer includes the Cornerstone logo and text: 'Powered by Cornerstone OnDemand, Inc. ©2000-2019 All Rights Reserved. Terms - Privacy - Cookies - Feedback'.

11. "Submit Review" confirmation popup appears, click **Submit**

The screenshot shows a 'Submit Review' confirmation popup. The title is 'Submit Review' with a close button (X) in the top right corner. The main text reads: 'You will not be able to modify once you have submitted. Are you sure that you want to submit now?'. At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

12. Final Evaluation and rating is complete! Confirmation page appears

You are currently logged in as Little Buffalo

2019-2020 Classified Staff Year End Evaluation

Options

- Overview
- Classified Goal Rating
- Summary
- Employee Acknowledg...



Little Buffalo
Admin Assistant I
4/1/2019 - 3/31/2020



Thank you for completing this step in the final performance evaluation.