

# **Cornerstone for Performance Management User Guide Series:**

## **Performance Planning for Employees**



# Performance Planning for Employees

## Introduction

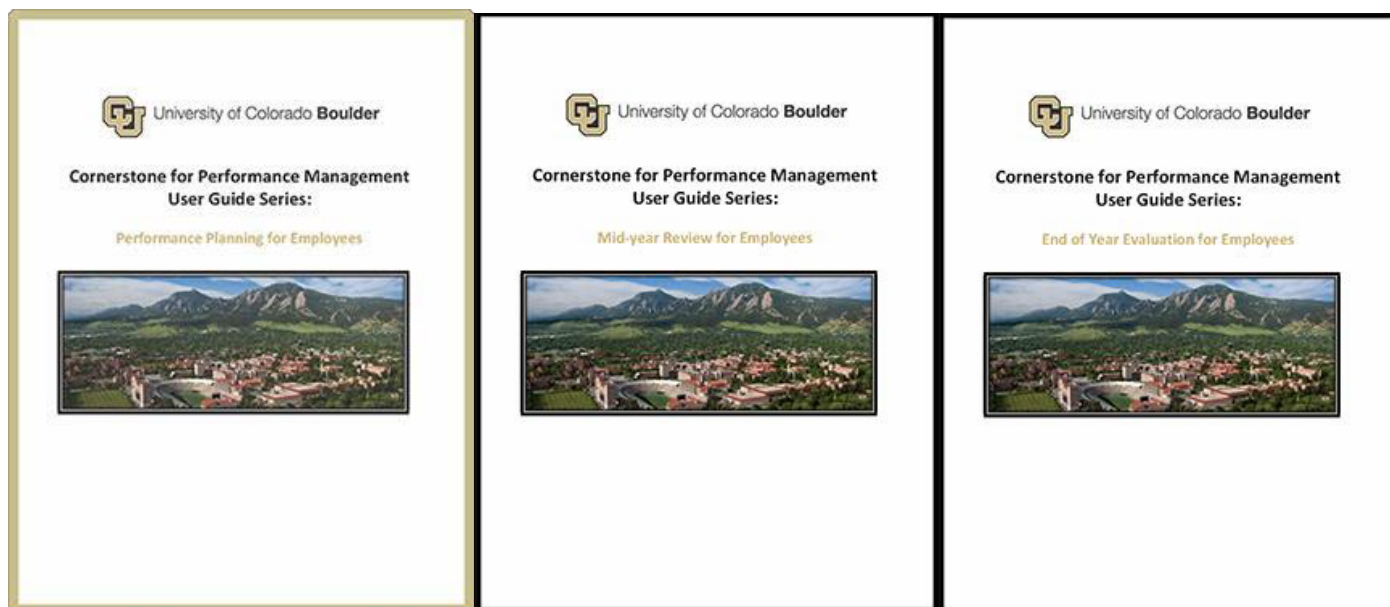
The University of Colorado Boulder made the decision to offer a new online performance management solution (Cornerstone) to better support our collective efforts toward improving talent management on campus. The specific goals of this tool are to:

- 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 consistent with campus values and the Colorado Creed
- Facilitate more frequent and meaningful conversations between employees and managers 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

## Purpose of This User Guide

This user guide is intended to walk you through the first of three steps in Performance Management: **Performance Planning.**

Tasks for the mid-year review and end of year evaluation will be launched later in the year, and will be accompanied by additional user guides and training.



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## 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 to Employee Relations staff here:

[www.colorado.edu/hr/cornerstone](http://www.colorado.edu/hr/cornerstone)

## Important Definitions

The following definitions should help guide you in using Cornerstone for performance management:

**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.

**Performance Management:** The year-long process through which managers 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.

**Goals:** Observable and measurable future results to be achieve 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.

**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.

## Getting Started with Goal Planning

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

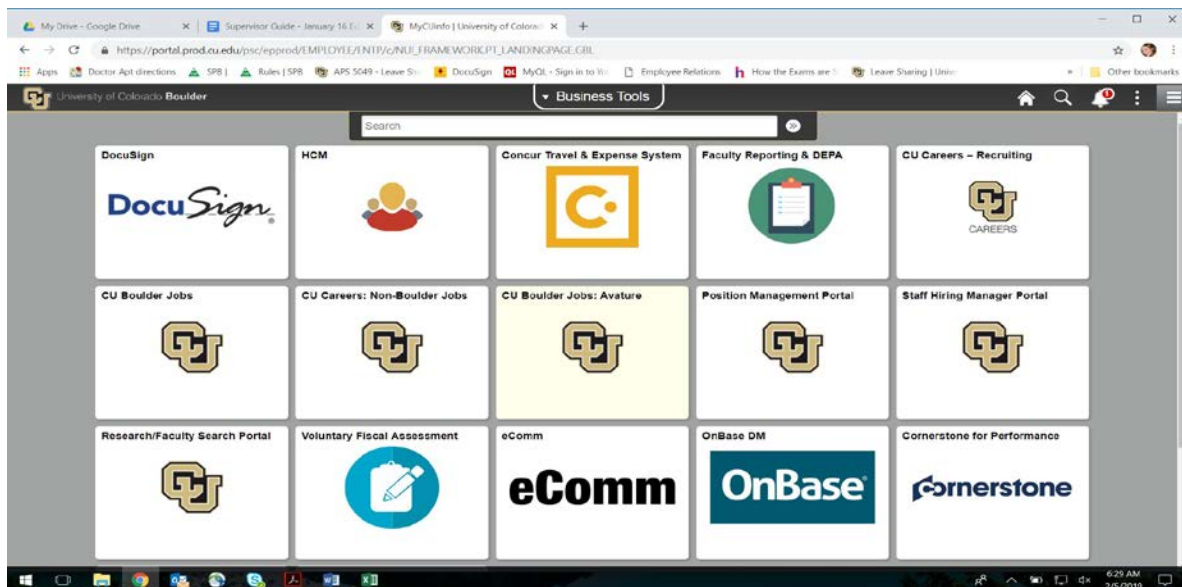
At the beginning of each performance cycle, managers and employees are responsible for developing goals. While goals should be created within Cornerstone, using such tools as the SMART goal wizard and alignment capability, they should be discussed through ongoing face-to-face dialogue.

The goals 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 and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

## Login to 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 tile



If the MyCUinfo portal is down, you can also access Cornerstone through the following link:

<https://colorado.csod.com/samldefault.aspx>

Login to Cornerstone using your CU Boulder IdentiKey and password:

 Federated Identity Service  
UNIVERSITY OF COLORADO BOULDER

### Log in to Cornerstone OnDemand

**CU Login Name**

**Identikey Password**

☐ Check this box to view your [Digital ID Card](#) and reset release approvals before logging into the service. [Learn More...](#)

**Continue**

Trouble signing in? [We can help.](#)

To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account.

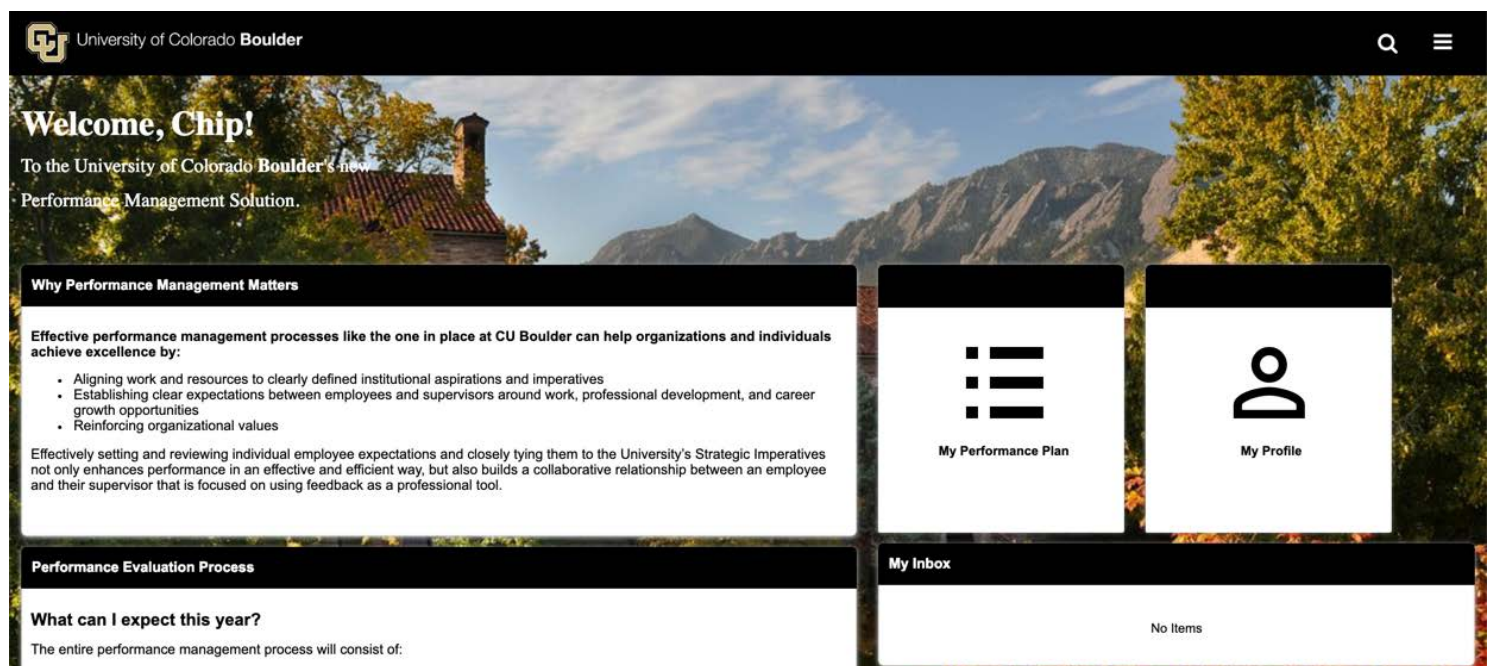
**Note:** Due to the nature of this authentication page loading dynamically per service, **DO NOT** bookmark the URL in your browser's address bar. Instead, bookmark the service URL (e.g. <https://voicethread.colorado.edu> or <https://qualtrics.colorado.edu>).

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## Home Page Review

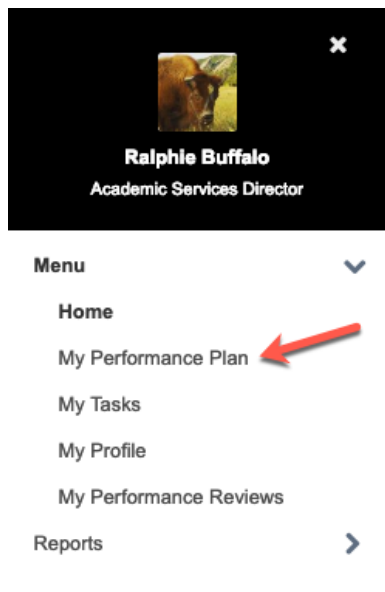
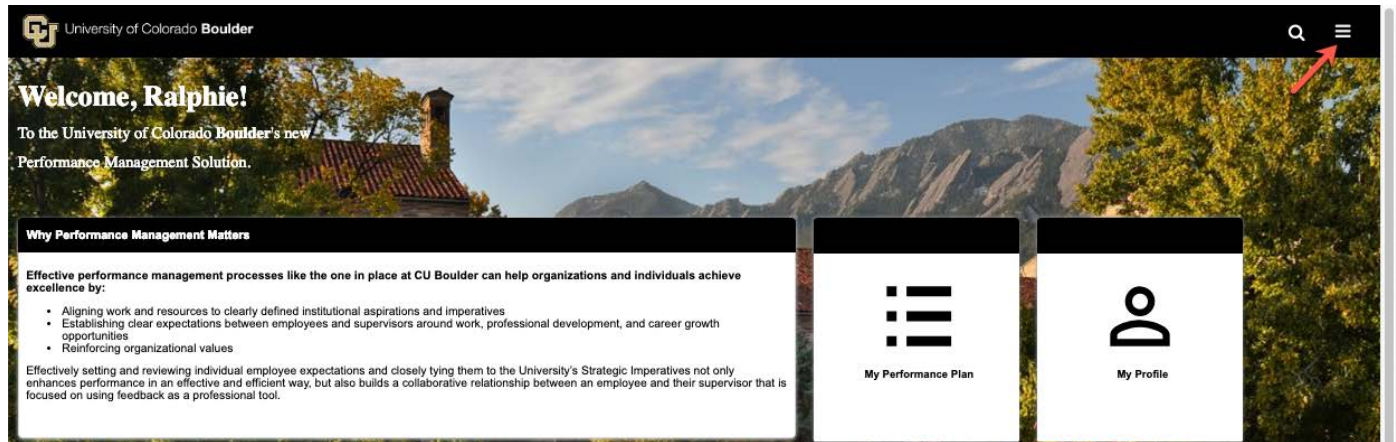
1. Upon logging in you will land on the Cornerstone **Home Page**
2. Review all tiles for important details regarding the new performance management philosophy, the performance evaluation process and timeline, and performance tasks that require your review and completion.
3. Please note the link to the 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 on your experience using Cornerstone to the implementation team.



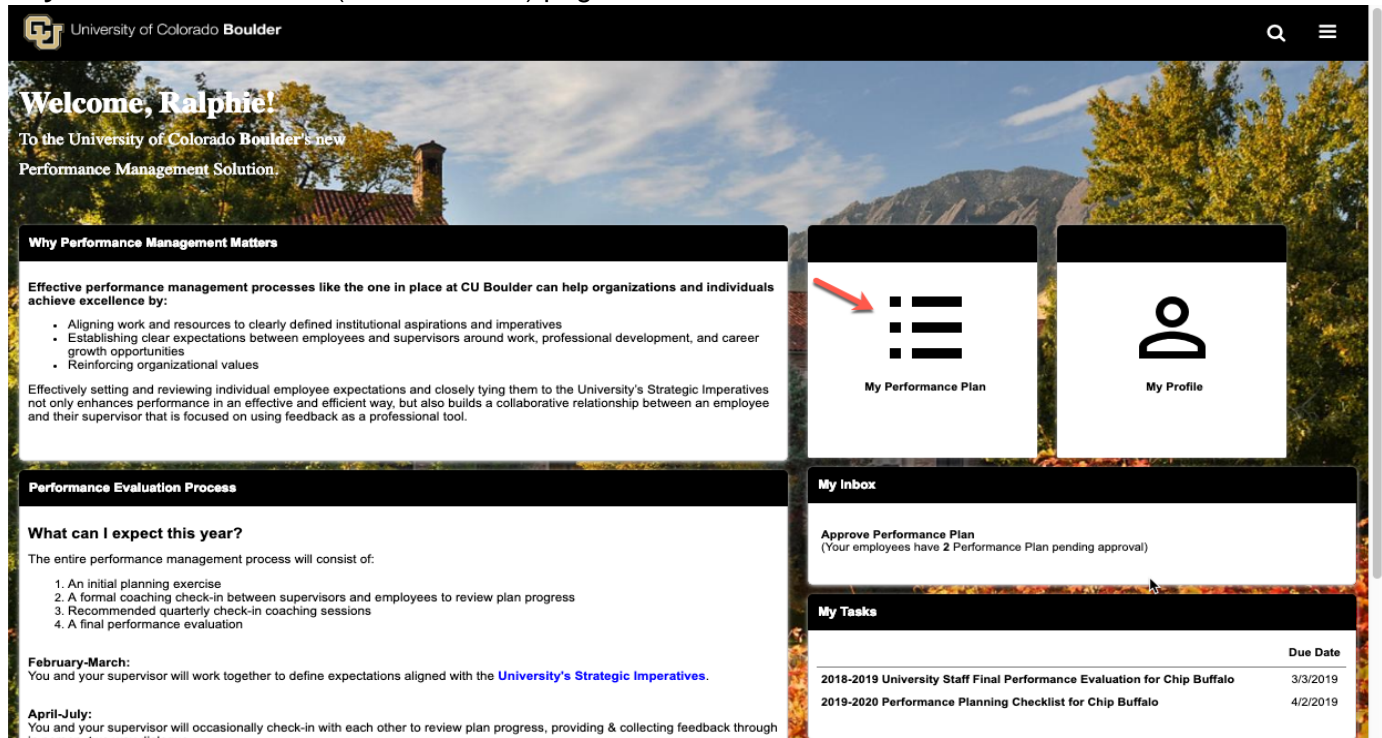
## Create Goals

1. Using the main navigation menu on the top right-hand corner of the screen, navigate to the **"My Performance Plan"** option. This is also the same location to create or modify goals within the performance plan.

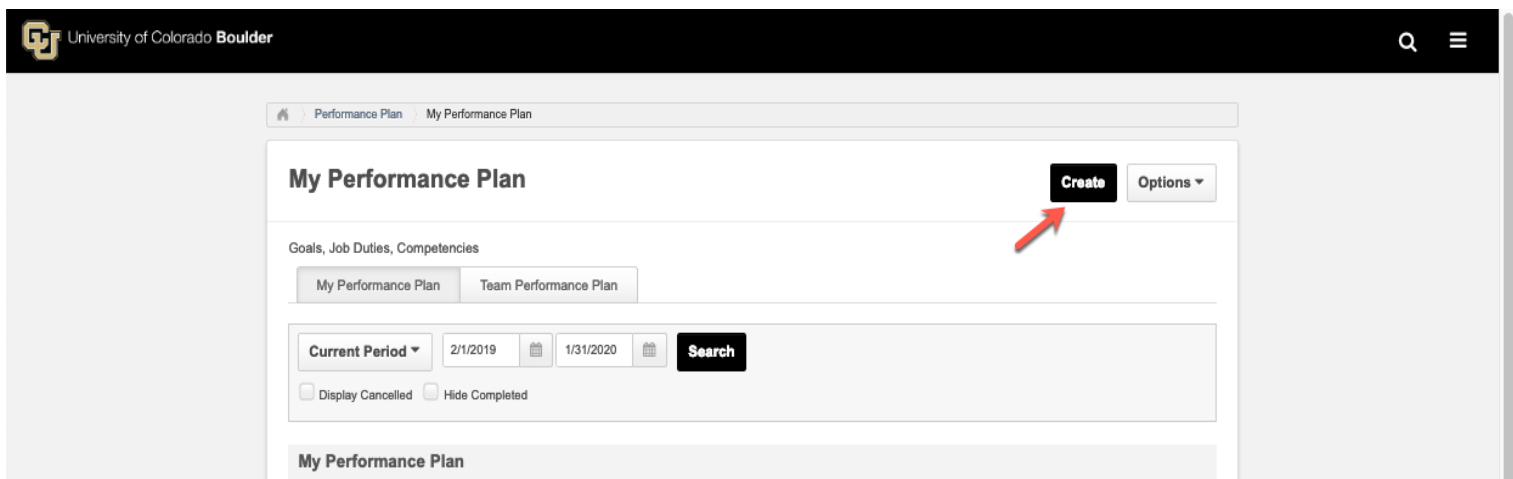
Home page> Hamburger Menu > My Performance Plan.



You may also click on the “**My Performance Plan**” tile on the home page to access the same “**My Performance Plan**” (Goal Creation) page.



2. To add goals, click **Create** on the top right of the screen.



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





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

The form consists of two main sections. The first section is labeled 'Title \*' and contains a single-line text input field. The second section is labeled 'Description' and contains a rich text editor with a toolbar. The toolbar includes buttons for bold (B), italic (I), underline (U), strikethrough (S), text color (I\_x), bulleted list, numbered list, indent, outdent, and a link icon. Below the toolbar is a multi-line text area for the description.

5. Align your goals with higher-order departmental goals by clicking the **Align** button.

This section is titled 'Alignment'. It contains a light gray box with the text 'Not currently aligned'. Below this box is a button labeled 'Align'. A mouse cursor is shown clicking the 'Align' button.

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.

This section contains two date input fields. The first field is labeled 'Start Date' and has a default value of '2/1/2018'. The second field is labeled 'Due Date \*' and has a default value of '1/31/2019'. Both fields include a calendar icon to the right of the date input.

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

This section is titled 'Type \*'. It features a dropdown menu with a 'Select' button. The dropdown is open, showing four options: 'Select' (with a checkmark), 'Competency', 'Goals', and 'Job Duties'.

8. Select at least one **University Imperative** that best embodies your goal, job duty, or competency.

This section is titled 'University Imperative \*'. It contains a dropdown menu labeled 'Select options'. Below the dropdown is a list of five checkboxes with corresponding text: 'Select All', '\*Be the Top University for Innovation', '\*Positively Impact Humanity', '\*Shape Tomorrow's Leaders', and 'Other'.

9. Add specific milestones for your goals under the **Tasks and Targets** section if applicable.

Tasks and Targets

Add Tasks or Targets

Add Tasks or Targets

Description

Start Date 2/1/2018 Due Date 1/31/2019

☐ 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. If you do not select this box, this goal will be private but will be visible to your manager.

Visibility

☐ Allow other users to see and align

12. Once you have finalized the goal, click **Submit**. The goal will be assigned to you. You also have the option to save the goal as a draft.

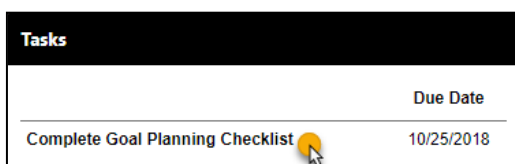
Cancel Save as Draft Submit

## Completing Tasks in Cornerstone

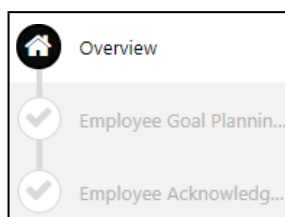
**Employee Goal Planning Task:** This task contains a checklist of items to review once initial goal planning has been completed for the plan year. Prior to completing the Employee Goal Planning task, work with your supervisor to ensure goals have been created and that any additional goals have been added.

### Completing the Goal Planning Task

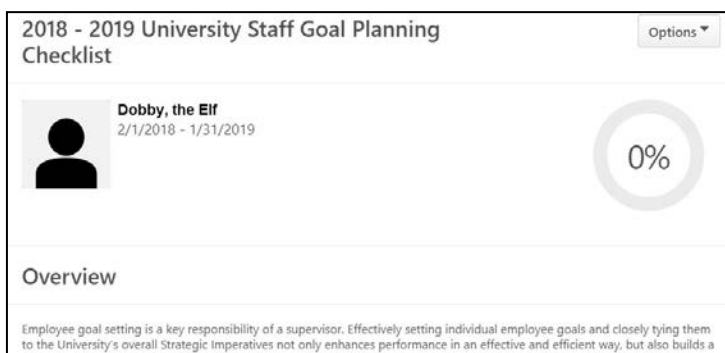
1. In the Tasks tile, click on “Complete Goal Planning Checklist.” Note: If your supervisor has not yet completed the checklist and sign-off, you will not see the task. They must complete the task prior to it displaying in your task list.



2. After opening the task, review the task steps on the left-hand side of the screen to become familiar with the steps in the planning process.



3. Review the task overview for an explanation of the purpose of the task and any important details you should know prior to completing the task.



4. Click **Get Started** to move on to the next step in the task and begin the checklist.



5. Review the Employee Goal Planning Checklist and use the checkboxes to indicate completion of goal planning tasks.

### Employee Goal Planning Checklist

The following checklist should be reviewed once initial goal planning has been completed for the plan year. If you have not reviewed and created goals in Cornerstone and discussed them with your supervisor, please do so before completing this checklist.

Have you met with your supervisor to discuss your performance plan?	<input checked="" type="checkbox"/>
Have you reviewed goals created by your supervisor?	<input checked="" type="checkbox"/>
Have you created any necessary goals in addition to the goals created with your supervisor?	<input checked="" type="checkbox"/>
Note that goals can and should be edited and updated throughout the plan cycle with your supervisor.	<input checked="" type="checkbox"/>

\*

6. If you have not completed goal planning or met with your supervisor to discuss your performance plan you may click **Back** or **Save and Exit** to exit the checklist task.
7. If you have completed all items on the checklist, click **Save and Continue** to move on to the next step.

Back

Save and Exit

Save and Continue

8. Enter your first and last name and click **Sign** for the Employee Acknowledgement.

### Employee Acknowledgement

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

Self

Sign

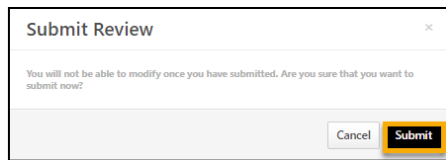
9. If you are ready to submit the checklist and route it to your employee for completion, click **Submit**.
10. You may also click **Save and Exit** if you are not ready to route to your employee.

Back

Save and Exit

Submit

11. Click **Submit** in the popup window to confirm submission.



12. A confirmation page will display.

