

February 1, 2019 - Performance Planning Checklist Task: University Staff

Steps for Supervisor

Cornerstone homepage - you will see One (1) Task appear in your My Tasks box for EACH of your Direct Reports

University of Colorado Boulder

You are currently logged in as Manager 1 Test User

Stage Site

Welcome, Manager 1!
Cornerstone for Performance Management

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. 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.

October:
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.

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](#).

My Performance Plan

My Profile

My Inbox

No Items

My Tasks

	Due Date
Performance Planning Checklist for Employee 1 Test User	1/28/2019

You will see the same task for each of your Direct Reports.

- **Click on the Task**

- Read the Overview

University of Colorado Boulder

You are currently logged in as Manager 1 Test User

2018-2019 University Staff Performance Planning

Options ▾

Employee 1 Test User
2/1/2018 - 1/31/2019

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: 1/28/2019) ✓
- ✓ Employee Acknowledgement ✓

Get Started

Cornerstone

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- Click “Get Started”

Performance Planning Checklist Task

Review Supervisor Goal Planning Checklist

- Check off each item once it is finished

University of Colorado Boulder

You are currently logged in as Manager 1 Test User

2018-2019 University Staff Performance Planning

Options

Employee 1 Test User
2/1/2018 - 1/31/2019

0%

Supervisor Goal Planning Checklist

If you have not reviewed and created a performance plan in Cornerstone and discussed it with Employee 1 Test User, 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

Build a performance plan for your employee in Cornerstone

Back Save and Exit Save and Continue

Cornerstone

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*You may click "Save and Exit" to be able to resume the Task at a later time.

- Click "Save and Continue" once you are finished

- Enter your name in Supervisor text box

University of Colorado Boulder

You are currently logged in as Manager 1 Test User

2018-2019 University Staff Performance Planning

Options ▾

Overview
Supervisor Goal Planni...
Supervisor Sign-Off

Employee 1 Test User
2/1/2018 - 1/31/2019

50%

Supervisor Sign-Off

Please provide an e-signature to confirm.

Supervisor
Mike Murray

Sign

Back Save and Exit Submit

Cornerstone

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javascript:void(0)

*You may click "Save and Exit" to be able to resume the Task at a later time.

- Click "Submit"

- **Confirmation Page appears,** you may now go back to your Cornerstone Homepage

The screenshot shows the Cornerstone OnDemand interface for the University of Colorado Boulder. The header includes the university logo and name, a search icon, and a menu icon. A notification bar states, "You are currently logged in as Manager 1 Test User". The main content area features a sidebar with navigation links: Overview, Supervisor Goal Planni..., and Supervisor Sign-Off. The central panel is titled "2018-2019 University Staff Performance Planning" and includes an "Options" dropdown. Below the title, there is a profile card for "Employee 1 Test User" with the period "2/1/2018 - 1/31/2019" and a circular progress indicator showing "100%". A message box below the profile card states: "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** tab under the main navigation menu." The footer contains the Cornerstone logo and copyright information: "Powered by Cornerstone OnDemand, Inc. ©2000-2019 All Rights Reserved. Terms - Privacy - Cookies - Feedback". A back arrow icon is located in the bottom right corner.

**Task will now be pushed to the Direct Report for Signoff
Supervisor is now done with this Task for that Direct Report!**

Employee/Direct Report Steps

Once your supervisor submits your evaluation you will see One (1) Task appear in your “My Tasks” box

University of Colorado Boulder

You are currently logged in as Employee 1 Test User

Stage Site

Welcome, Employee 1!

Cornerstone for Performance Management

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My Performance Plan

My Profile

My Inbox

No Items

My Tasks

	Due Date
My Performance Planning Checklist	1/14/2019

• Click on the Task

Performance Planning Checklist Task

- Read the Overview

University of Colorado Boulder

You are currently logged in as Employee 1 Test User

2018-2019 University Staff Performance Planning

Options ▾

Employee 1 Test User
2/1/2018 - 1/31/2019

0%

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Review Step Progression

Supervisor Review ✓

Employee Acknowledgement ✓
Due: 1/14/2019

Get Started

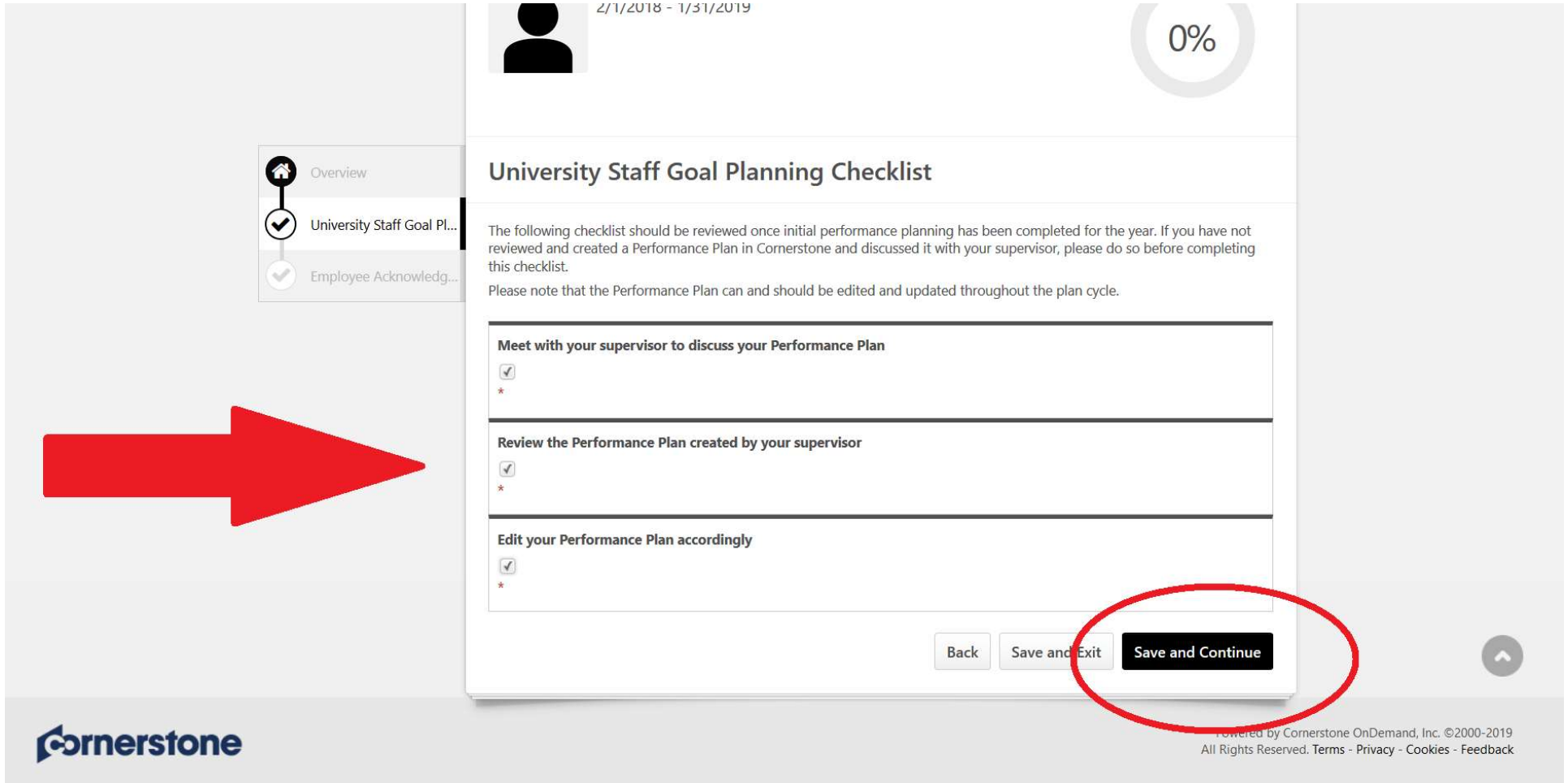
Cornerstone

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- Click “Get Started”

Review Goal Planning Checklist

- Check off each item once it is finished



2/1/2018 - 1/31/2019

0%

Overview

University Staff Goal Pl...

Employee Acknowledg...

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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*You may click "Save and Exit" to be able to resume the Task at a later time.

- Click "Save and Continue" once you are finished

Employee Acknowledgement

University of Colorado Boulder

You are currently logged in as Employee 1 Test User

2018-2019 University Staff Performance Planning

Options ▾

Employee 1 Test User
2/1/2018 - 1/31/2019

50%

Employee Acknowledgement

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

Acknowledgement

Mike Murray

Sign

Back Save and Exit Submit

Cornerstone

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javascriptvoid(0)

**You may click "Save and Exit" to be able to resume the Task at a later time.*

- Enter your name in Employee text box
- Click "Submit"

Confirmation Page appears

The screenshot shows a web interface for the University of Colorado Boulder. The header includes the university logo and name, a search icon, and a menu icon. The main content area is titled "2018-2019 University Staff Performance Planning" and includes an "Options" dropdown. Below this, there is a section for "Employee 1 Test User" with a profile icon and a 50% progress indicator. The "Employee Acknowledgement" section contains a message for employees to provide an e-signature. Below this, the acknowledgement details for "Mike Murray" dated "1/7/2019" are shown, along with a "Redo" button. At the bottom right, there are three buttons: "Back", "Save and Exit", and "Submit". The "Submit" button is circled in red. The footer includes the Cornerstone logo and copyright information.

University of Colorado Boulder

2018-2019 University Staff Performance Planning

Options

Overview
University Staff Goal Pl...
Employee Acknowledg...

Employee 1 Test User
2/1/2018 - 1/31/2019

50%

Employee Acknowledgement

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

Acknowledgement
Mike Murray Date:1/7/2019 Redo

Back Save and Exit Submit

Cornerstone

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*You may click "Save and Exit" to be able to resume the Task at a later time.

- Click "Submit"

Task is complete!