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](http://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

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.
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”

   Hi Chip,

   On 8/7/2019 a change was made to one of your goals in Cornerstone: “Core Competency 1: Integrity/Responsibility/Ethics

   This change was made by Ralphie Buffalo

   Please log into Cornerstone and review your Performance Planning section to ensure that you are aware of expectations for this plan year. If you have questions, please contact your supervisor.

   Please do not reply to this email.

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

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

   Hi Chip Buffalo,

   An item has been added to your performance plan: New Goal

   Please log into Cornerstone to review your Performance Planning section. If you have questions, please contact your supervisor.

   Please do not reply to this email.

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

   **Email Notification Subject: Performance Plan Changes/Additions Approved**

   ![Email Notification Example](image1.png)

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**

   ![Email Notification Example](image2.png)

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**

   ![Email Notification Example](image3.png)
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
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
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
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
4. **Goal Status**
   
   i. Any changes to the Goal Status will NOT generate any notifications
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
      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)
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.

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
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.

5. If applicable, align your goals with higher-order departmental goals by clicking Align.
a. You may search for any individual on campus who has visible goals by clicking the window search box and entering the individuals name
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.
7. For **Type** please select whether this is a “Goal” “Job Duty” or “Competency”

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”

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

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

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*
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**.*

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**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
2. Click “View Team”

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

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”

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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.
2. 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.

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

4. 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**

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

11. A confirmation page will display

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**

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**
4. Review the “University Staff Goal Planning Checklist” and use the checkboxes to indicate completion of the planning tasks

5. 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
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
8. A confirmation page will display. **Task is complete!**
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.

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.

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

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
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***

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

12. A confirmation page will display
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**

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

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
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.

10. “Submit Review” confirmation popup appears, click **Submit**.
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.
2. 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.
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.
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
4. Review the “University Staff Ratings”
5. Click **Select** to select a Rating for each goal. (The overall rating will be added in a later step)
6. Enter Comments for each goal, job duty or competency
7. 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*
8. “Submit Review” confirmation popup appears, click **Submit**

9. A confirmation page will display
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**

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

9. Confirmation page appears, your comments and feedback have been submitted to your Supervisor for review
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
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
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*
7. “Final Departmental Rating” requires the selection of Overall Rating and any additional comments
8. Click Save and Continue
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
12. “Submit Review” confirmation popup appears, click Submit

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

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

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
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. Click Next

6. “Final Departmental Rating” appears and includes any final comments from your Supervisor

7. Enter any comments relating to the Final Overall Rating here

8. Click Save and Continue
9. 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

10. Click **Submit** once signature has been applied

11. 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*

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
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
6. Enter optional final narrative

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

11. Click **Submit**

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

*Note: once submitted you cannot modify!*
13. A confirmation page will display
14. Final Evaluation has now been sent to the assigned Reviewer (Second Level Supervisor) for their review

**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*
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.

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

5. Click **Save and Continue**
6. View Supervisor final narrative if applicable
7. Review Overall Rating
   *Note: Overall rating is displayed in decimals. Ex: 2.71 = 271 on the Classified Rating Scale*

8. Click **Next**

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**

12. Submit Review Confirmation window will appear
   **Note, once submitted you cannot modify!**
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

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.
4. 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.

5. Click **Get Started** to move on to the next step in the task.

6. Review the evaluation in its entirety.
   
   **Note:** All goals, job duties and competencies will be on one page.

7. Click **Save and Continue**
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

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**

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

13. Click **Submit**

14. “Submit Review” confirmation popup appears, click **Submit**
15. A confirmation page will display

**Employee Steps**

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

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
6. Review supervisor final narrative
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
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**

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

![Profile Picture]

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

100%

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