Annual Performance Planning:
Leader Cornerstone User Manual

Instructions for navigating the Cornerstone system to complete and approve Annual Performance Plans
Leaders must complete two components in the Annual Performance Planning process. Below are links to the job aids that will support you.

1. Creating Your Own Annual Performance Goals
2. Approving Team Member Goals
Annual Performance Planning:
Creating Your Own Performance Goals
This is the Annual Performance Planning home screen.

Use your WSU AccessID and password to log in to this system with the link: Academica > Employee Resources > Administrative Systems > Cornerstone Conversations.

1. The instructions provide an overview of the new performance process and include a link to learning opportunities and resources to help you throughout the year.

2. Your Inbox will reflect messages pertinent to your Annual Performance Plan. Disregard transcript messages for the time being.

3. The Your Tasks area links to the tasks you will need to complete throughout the year with due dates for each task. Past due tasks are marked with an exclamation point.

To get started, click the “Annual Performance Planning” link.
This is the screen you will see when you click on “Annual Performance Planning” under Your Tasks on the home screen.

1. The **left sidebar** keeps track of where you are in the Annual Performance Planning process.
   - Steps requiring input or viewing will be highlighted in white.
   - Completed sections are marked with a green check.

2. The **Overview area** provides general information. **Note:** There are **learning resources** available to help you write terrific goals!

3. This **“Review Step Progression” indicator** shows just 2 steps occur in this process – the goals you submit and the final approval/input your manager provides. **Note:** It no longer requires HR or second level manager approval.

4. This **progress meter** indicates the percentage of sections you’ve completed and aligns with the green checkmarks in the left sidebar (1).

5. The **Get Started button** will take you to the Performance Goals section of Cornerstone.
Annual Performance Planning:
Performance Goals Screen: Getting Started

This is the screen you will see once you click “Get Started.”

Note: There are learning resources available to help you write meaningful goals. Click on Plan.

1. This area provides brief instructions for employees.

2. This area provides brief instructions for managers.

3. The Add Goals button allows you to add a goal to your Annual Performance Plan. Multiple goals can be added, although they must be added one at a time.

4. The Back button returns to the previous page in the system.

5. The Save & Exit button allows you to save your work and leave Cornerstone.

6. The Save & Continue button allows you to save your work and continue to the next section in Cornerstone.

Note: You should wait until all goals have been entered before advancing to WSU Values.
Annual Performance Planning: Input Window for Creating Goals

Once you click "Add Goals," this screen will guide you through the process. Although you will likely include several goals in your plan, you will add them one at a time.

1. Add a title for your goal here.  
   Example: Improve user experience of XYZ software.

2. Add the text describing your goal here.  
   Example: Improve the user experience of XYZ software to achieve a customer feedback score of "good or better" by increasing web accessibility functions by Q2 2022 to ensure compliance with web accessibility guidelines.

3. There is a SMART Goals Wizard available right in Cornerstone to help you double-check goal quality.

4. Indicate a start and end date for your goal, falling within the performance year. For instance, the start date should be 10/1/22 or later and the end date should be 9/30/23 or sooner for the FY23 fiscal year. If this doesn’t occur, the performance goal will not populate on the Annual Review at the end of the year.

5. In this field, indicate a weight for your goal, or the percentage it will count toward your overall performance.  
   Note: The sum of your goal weights should add up to 100%.

6. You can add up to three attachments to each goal here, although this is optional.

7. When you are done, click Save. You can return later to edit your goals before submitting them for review. Once submitted your goals are longer accessible on the Performance Planning site.
The **SMART Goals Wizard** will help confirm your goals are Specific, Measurable, Actionable, Relevant, and Timely. While the Wizard is optional, it is a very helpful tool to review your goals.

1. The **top bar** shows your progress through each section of the Wizard. Tips for reviewing your goal against each SMART element are included directly below the top bar.

2. In this area, you will see the **title and text** for your goal, so you don’t have to remember them as you are reviewing the SMART elements. You may also directly enter your goals here.

3. When you **click Continue**, you will move to the next SMART element in the top bar.

   Once you have checked your goal against all the elements, you can **click Continue** to return to the Goal Input screen and **Save** your goal.
Annual Performance Planning: Performance Goals Screen: Reviewing Goals You’ve Created

This screen shows the goals you have added and saved, pending supervisor approval.

1. **All goals will be listed here** after you have saved them to your Annual Performance Plan.
2. You can **add a comment** about your goal.
3. This drop-down arrow provides the option to **edit, delete, or view the history** of your approved goals.
4. Check the **total weight** of all your goals. **Note:** your combined goal weights must add up to 100%. You can use the edit option (under #3) to edit the weight of individual goals as needed.
5. Click **Add Goals** if you have not finished inputting all your goals.
6. Once you are done adding all your goals and checking that their total weight is 100%, **click Save and Continue** to advance.

If you want to return later to Cornerstone to complete your goals, **click Save and Exit**.
This screen follows the submission of your annual performance goals and is simply for your review.

Here you are asked to reflect on how you are achieving your work, not just the work you are achieving.

Reflect on these Six Wayne State Values:

- **Collaboration**
- **Diversity & Inclusion**
- **Excellence**
- **Innovation**
- **Integrity**
- **Leadership**

It is important to consider how your goals align with Wayne State’s Values. This conversation will occur during your Annual Performance Review.

1. Once you have reviewed these values, you can **click Save and Continue** to move to the next section.

If you want to return later to Cornerstone to review these values, **click Save and Exit**.
This screen invites you to consider your ongoing professional growth.

The instructions provide **resources to aid** you in the development of your plans. Click on the Plan tab of this webpage.

**Note:** You will **review and refine your plans with your supervisor**.

1. In this section, identify **the knowledge and skills** that might be helpful for achieving your performance goals.

2. Here, **identify ways you might begin** your professional development journey.

Once you are done adding the knowledge and skills helpful to achieving your performance goals, you can **click Save and Continue**.

If you want to return later to Cornerstone to complete your goals, **click Save and Exit**.
This screen invites you to engage in career development planning.

Your Career Development plans are an optional activity.

The introduction includes a link to career development resources to help guide you and your supervisor in your planning. Click on Plan.

1. What professional aspirations do you have?
2. What job skills would you like to grow into?
3. What does your long-term career vision look like?

This is an optional section of the Annual Performance Plan.

Once your career development plans are added, you can click Save and Continue to move to the final section.

If you want to return later to Cornerstone to complete your career development plans, click Save and Exit.
This is the final screen you will see once you have completed all sections of your Annual Performance Plan.

1. To “sign” your plan, enter your name here.

2. Use this space to share any comments with your supervisor.

3. Once you are satisfied with your content and have double checked the total weight of your performance goals is 100%, you may click Submit.

   If you are not ready to complete your annual performance plan, click Save and Exit.

   To review previous sections, click Back.

Note: Once submitted, your Annual Performance Plan will go directly to your supervisor for approval, and you will not have the opportunity to make any further edits.

Refer to the Nurture Ongoing Success Staff Cornerstone User Guide for job aids on viewing and updating approved performance goals.
Annual Performance Planning:
Approving Team Member Goals
To begin the approval process, you will use your WSU AccessID and password to log in to Academica: Academica > Employee Resources > Administrative Systems > Cornerstone Conversations.

1. The **Your Tasks** area will identify the staff goals awaiting approval. Simply click “Complete Annual Performance Plan for XXX” to begin the approval process.

2. Alternatively, you can click the navigation menu and either select Scheduled Tasks, and click on the “Complete Annual Performance Plan for XXX” to begin or select Universal Profile, Actions.

Once a selection is made, you will be directed to the employee’s Annual Performance Planning Overview page.
This Overview screen shares general instructions for the annual performance planning process. Note:

1. This is just a two-step process with employee submitting their goals in the annual performance plan and the manager providing input/approval. No second level manager or HR approval step is required.

2. Click the **Get Started button** to access the main page of the employee’s performance goals.

**Note:** You will be required to advance through all the performance planning stages to reach the final submit button.
Annual Performance Planning: Performance Goals Screen: Approvals or Edits

This is the main screen for employee performance goals.

1. Each new performance goal will require manager review. All performance goals can be approved without making comments or edits by clicking on Save and Continue at the bottom right. If a goal is significantly modified after it’s approved during the update process, you’ll be brought to this same page to approve changes. This includes start/end date, title, and/or weighting changes.

   When reviewing goals, keep in mind:
   - The fiscal year timing of this performance cycle – end dates should be September 30 to enable the goal to be pre-populated into the Annual Review at the end of the year.
   - Weightings of all goals should equal 100%
   - Unit strategic priorities, job descriptions, and other forms of input to ensure individual goals align with desired outcomes.
   - Comments can be added as notes for individual consideration without formally editing a given goal

2. To modify a goal’s title, start/end date or weighting, click the dropdown arrow and select Edit. Files could also be uploaded here. Alternatively, goals could be deleted if required. Be sure to schedule a discussion with the individual to discuss requested changes.

   Note: There are learning resources available to help you write or coach toward the creation of meaningful goals. Click on the Plan tab in the accordion featured on this webpage. Instructions for updating approved goals or cascading approved goals are provided in the Nurture Success Cornerstone User Guide (coming soon).
Annual Performance Planning: Input Window for Editing Goals

Editing goals brings you to the Create Goals screen. Here you can modify content, confirm information, or simply leave a comment.

1. Is the title an accurate reflection of the intended goal?
2. Does the goal align with team performance goals? Is this a SMART goal?
3. Are the start and end dates accurate? For instance, the start date should be 10/1/22 or later and the end date should be 9/30/23 or sooner for the FY23 fiscal year. If this doesn't occur, the performance goal will not populate on the Annual Review at the end of the year.

Do you agree with the goal weight, as this defines the level of priority for you and the employee?

Note: The sum total of goal weights should add up to 100%.

4. You are able to upload a maximum of three attachments, if desired, or simply add comments.
5. When you are done, click Save.
Once you’ve saved the goal, you will be returned to the Performance Goal page and your changes (if any) will be reflected.

For assistance in creating strong goals, refer to these learning resources. Click on the Plan tab in the accordion featured on this webpage.

1. There is no “approval button.” Once you are satisfied with the goal(s), and their combined weight equals 100%, click Save and Continue.

All goals will be “approved.”

To return to Cornerstone to complete goals, click Save and Exit.
No action is required by supervisors on the employee's WSU Values page.

1. To advance, **click Save and Continue**.

   To return to Cornerstone later to review these values, **click Save and Exit**.
On this screen you can review the professional development plans submitted by an employee, if any.

As part of your ongoing dialog, this is an opportunity to encourage employee growth. Click here for learning resources, then click on the Plan tab in the accordion featured on this webpage.

**Note:** Be sure to confirm the knowledge and skills identified are aligned with an employee’s professional duties.

1. Offer suggestions, support, and/or encouragement to the desired learning goal by leaving a comment.

2. Offer guidance or recommended next steps to the learning and development plan prompt by leaving a comment.

**Note:** The employee will see whatever modifications or comments you make.

3. Once you've reviewed an employee’s performance goals, click **Save and Continue**.

If you want to return later to Cornerstone to complete your comments, click **Save and Exit**.
Career development plans are an optional activity for your employee.

The introduction includes a link to career development resources to help guide you and your employee in planning. Click the staff or leader planner at this website. Note that the leader template offers sample agendas for career conversations along with thought-starter discussion questions.

1. Feel free to leave an encouraging comment if employees respond to any of the three prompts.

To advance to the final screen, click Save and Continue.

To return to Cornerstone to complete career development plans, click Save and Exit.
Annual Performance Planning: Goal Planning Acknowledgement

This is the final screen of the employee Annual Performance Planning process.

1. To approve an employee’s performance plan, enter your name here and click Sign.

2. Add any final comments.

3. Once you are satisfied with the performance plan, click Submit.

   If you are not ready to approve the performance plan, click Save and Exit.

To review previous sections, click Back.

Note: Once you click Submit, a final prompt will confirm whether or not the total weight of all goals equals 100%. If it does not, click Cancel and return to the performance goals page.

Once the approved performance plan is submitted, no further changes can be made.
Resources

**Learning Support**
Find:
- Instructor-led sessions on TSW
- Accelerate, on-demand learning

**Regional Support**
Click:
- **HR Consultants**
- **Cornerstone Clinic Schedule**
- **C&IT Help Desk**
  Ph. 313-577-4357
  For assistance with Academica links, internet browsers, etc.