Annual Review:
Leader Cornerstone User Manual

Instructions for Providing Performance Ratings for Direct Reports as well as Completing Your Own Self-Review/Acknowledgement in Cornerstone

September 15, 2022
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Below are links to the job aids that will support you in completing your own Annual Review and providing Annual Review feedback to your direct reports in this process*:

1. Completing Manager Reviews: Providing Performance Ratings for Direct Reports*
2. Completing Your Own Self-Review
3. Acknowledging Your Final Review Ratings Were Shared with You

* Individuals included in this 2022 performance management process: Academic Administrators, Executives, Managers, Researchers, and Non-Academic/Non-Represented Staff
Annual Review:
Completing the Manager Review: Providing Performance Ratings for Direct Reports
Contact your HR Consultant with any questions
The Annual Review process has 3 steps and requires that goals were approved for the start of the performance year in the "Annual Performance Plan". This year, goals were set for a short period of 4/1/22 – 9/30/22. The steps and deadlines are:

- Employee Self Review (due 9/30/22)
- Manager Review (due 10/21/22)
- Employee Acknowledgement (due 10/24/22)

To begin the Manager Review process to provide annual review ratings for direct reports, use your WSU Access ID and password to log into the system with this working link: Academica > Employee Resources > Administrative Systems > Cornerstone Conversations.


   If you don’t see a task for a direct report, it is because they haven’t yet completed their employee self-review.

Note: This landing page may look different over time as additional Cornerstone modules are implemented.
To get started with your Manager Review:

1. Click on **Get Started**. From here, you will be taken to your direct report’s Performance Goals page.

**Note:**

a. A **menu** shares the total number of web pages included in the Manager Review.

b. The calendar **year timeframe** shown below your direct report’s name and title is merely a system default – the rating period is from 4/1/22 – 9/30/22.

c. The **options drop down** offers an opportunity to:
   
   - Reference **one-on-one meeting documentation** in "View Check In's" if you took advantage of this system feature during the performance year. If not, but you’d like to learn more about it for next year, see this **brief video**. (To access, log in to Academica, Employee Resources, Other Resources, Accelerate. Click this link once to be brought to the landing page, then a second time to be brought to the video.)
   
   - **Print** your completed self-review
   
   - See your **progress** as you move through this process. Each time you open a page, you'll be 20% closer to completion.

Would you like to send this self-review back to your direct report for any changes? Simply click on **Reopen Step** to the left of **Get Started**.
On the Performance Goals screen, you have a variety of options to view your direct report’s approved performance goals prior to selecting a rating:

1. Use this drop down to:
   - View comments added to this approved goal throughout the performance year if available
   - View file attachments added to this approved goal throughout the performance year if available
   - Change your goal status by selecting Manage Goals. Here you can indicate the percentage of completion using the slide bar, add files, and/or add comments prior to rating.

2. Rate achievements by selecting the appropriate rating. Click on the green circle question mark for rating definitions. Ratings are required for each goal. Add comments if desired.

3. Reference direct report’s self-rating and comments, if provided.

4. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.

Note: if NO goals appear on this page, it because goals were not submitted by direct report and/or approved by you in the “Annual Performance Plan”. Proceed to the next page and capture performance goals in the Overall Performance Rating.
Skim the behavioral indicators for each WSU value as you consider the behaviors embodied by your direct report as they achieved their goals.

1. Select an overall rating to indicate the degree to which those behaviors aligned with the WSU values. Click on the green circle question mark for rating definitions. Add comments to share examples – these are required.

2. Reference direct report's self-rating and comments, if provided.

3. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.
If your direct report had professional development goals in their Annual Performance Plan, they would have added comments in each area of this Annual Review that you would be able to view (in a grey shaded box similar to the prior two pages for performance goals or values). There is no rating for this section.

1. Add comments to highlight feedback on any learning goals your direct report set out to achieve.

2. Add comments to highlight feedback on any learning activity achievements and the impact of them on your direct report’s work.

3. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.

Note: If your direct report did not have any learning goals, simply proceed with the Save and Continue button.
If your direct report had career development goals in their Annual Performance Plan to share the learning that would be helpful to reach their desired next career challenge, they would have added comments in this Annual Review that you would be able to view (in a grey shaded box similar to what was shown for performance goals or values). There is no rating for this section.

1. Add comments to highlight feedback on any career goals and learning your direct report set out to achieve and accomplishments, key learnings, etc. they experienced.

2. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.

Note: If your direct report did not have any career goals, simply proceed with the Save and Continue button.
Provide one combined, **overall rating** here for your direct report’s performance outcomes/impact attained as well as behavior alignment with the WSU values.

1. Select an **overall rating** to reflect both performance and value alignment. Click on the green circle question mark for **rating definitions**. Add **comments** to share rationale – this is required.

2. Reference **direct report’s self-rating and comments**, if provided.

3. Click **Save and Continue** to proceed or **Save and Exit** to complete the work up to this point and return at a later date. If you click **Back**, you will lose any work completed on this page.

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Note: If your direct report did not have any performance goals to rate on the "Performance Goal" page of this Annual Review process, you can still complete this section by referencing agreed upon goals that may have been documented outside of the Cornerstone system. These goals cannot be uploaded as a file – however the comments section could capture them as well as achievements.
Annual Review: Submit Final Ratings & Indicate a Discussion Was Held on Acknowledgment Page

Be sure to schedule a discussion to share the final ratings with your direct report. Then:

1. Type your name in order to sign this review and confirm that you had a discussion. Add comments if desired.

2. Click Save and Continue to submit the final rating, Save and Exit if you wish to save your signature and return at a later date, or Back if you wish not to sign at this time.

   A pop-up message will appear to confirm you wish to submit. Click submit once more.

Note: Once you click submit, you will not be able to make changes to this Manager Review. As you return to the Cornerstone landing page, you'll know you were successful if there are no tasks for this direct report listed in the "Your Task" area.

If you’d like to print a copy of what you submitted, go to the hamburger menu (three horizontal lines at top right corner of landing page), Scheduled Tasks, click the "show completed & expired tasks" box and click on the "Complete (Annual Review) Manager Review for (Direct Report)" file name. Here you could go to options in the top right corner to print review.

After your Annual Review discussion with your direct report, they will be asked to "Acknowledge" receipt of the ratings.
Annual Review:
Completing Your Self-Review
Contact your HR Consultant with any questions
The Annual Review process has 3 steps and requires that goals were approved for the start of the performance year in the "Annual Performance Plan". This year, goals were set for a short period of 4/1/22 – 9/30/22. The steps and deadlines are:

- Employee Self Review (due 9/30/22)
- Manager Review (due 10/21/22)
- Employee Acknowledgement (due 10/24/22)

To begin the Employee Self Review, use your WSU Access ID and password to log into the system with this working link: Academia > Employee Resources > Administrative Systems > Cornerstone Conversations.

1. Under "Your Tasks", click Complete (Annual Review) Self Review and then Acknowledge

Note: this landing page may look different over time as additional Cornerstone modules are implemented.
To get started with your Employee Self Review:

1. Click on Get Started. From here, you will be taken to your Performance Goals screen.

Note:

a. A menu shares the total number of web pages included for the Employee Self Review.

b. The calendar year timeframe shown below your name and title is merely a system default – the rating period is for goals from 4/1/22 – 9/30/22.

c. The options drop down offers an opportunity to:
   
   - Reference one-on-one meeting documentation in “View Check In’s” if you took advantage of this system feature during the performance year. If not, but you’d like to learn more about it for next year, see this brief video. (To access, log in to Academica, Employee Resources, Other Resources, Accelerate. Click this link once to be brought to the landing page, then a second time to be brought to the video.)
   - Print your completed self-review
   - See your progress as you move through this process. Each time you open a page, you’ll be 20% closer to completion.
On the Performance Goals screen, you have a variety of options to view/update approved performance goals prior to selecting a rating:

1. Use this drop down to:
   - View comments added to this approved goal throughout the performance year, if available
   - View file attachments added to this approved goal throughout the performance year, if available
   - Change your goal status by selecting Manage Goals. Here you can indicate the percentage of completion using the slide bar, add files, and/or add comments prior to rating.

2. Rate your achievements by selecting the appropriate rating. Click on the green circle question mark for rating definitions. Ratings are required for each goal. Add comments if desired.

3. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.

Note: if NO goals appear on this page, it because goals were not submitted and/or approved by your manager in the “Annual Performance Plan”. Proceed to next page and capture goal achievements on the Overall Ratings page.
Skim the behavioral indicators for each WSU value as you consider the actions you took in order to achieve your goals.

1. Select an overall rating to indicate the degree to which those behaviors aligned with the WSU values. Click on the green circle question mark for rating definitions. Add comments to share examples – this is required.

2. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.
If you had professional development goals in your Annual Performance Plan to share the *learning that would be helpful to reach your performance goals*, please describe activities you completed here. There is no rating for this section.

1. Add comments to highlight the **learning goals** you set out to achieve.

   *Note: this section does not automatically populate from the Annual Performance Plan.* Not sure how to locate your original goals? Go to the hamburger menu (3 horizontal lines at the top right of the Cornerstone landing page, Scheduled Tasks. Click ‘show completed and expired tasks’, then click on the “2022 Annual Performance Planning” file name.

2. Add comments to highlight **learning activity achievements** and the impact of them on your work.

3. Click **Save and Continue** to proceed to next page or **Save and Exit** to complete the work up to this point and return at a later date. If you click **Back**, you will lose any work completed on this page.

   *Note: if you did not have any learning goals, simply proceed with the Save and Continue button.*
If you had career development goals in your Annual Performance Plan to share the learning that would be helpful to reach your desired next career challenge, please share activities you completed here. There is no rating for this section.

1. Add comments to highlight the career goals and learning you set out to achieve and accomplishments, key learnings, etc.

   Note: this section does not automatically populate from the Annual Performance Plan. Not sure how to locate your original goals? Go to the hamburger menu (3 horizontal lines at the top right of the Cornerstone landing page, Scheduled Tasks. Click ‘show completed and expired tasks’, then click on the “2022 Annual Performance Planning” file name.

2. Click Save and Continue to proceed to next page or Save and Exit to complete the work up to this point and return at a later date. If you click Back, you will lose any work completed on this page.

   Note: if you did not have any career goals, simply proceed with the Save and Continue button.
Provide one combined, **overall rating** here for performance outcomes/impact attained as well as behavior alignment with the WSU values.

1. Select an **overall rating** to reflect both performance and value alignment. Click on the green circle question mark for **rating definitions**. Add **comments** to share rationale – this is required.

2. Click **Submit** to send your self-rating to your manager for input/discussion/final ratings or **Save and Exit** to complete the work up to this point and return at a later date. If you click **Back**, you will lose any work completed on this page.

Note: if you did not have any performance goals to rate on the “Performance Goal” page of this Annual Review process, you can still complete this section by referencing agreed upon goals that may have been documented outside of the Cornerstone system. These goals cannot be uploaded as a file – however the comments section could capture them as well as achievements.
Once you select Submit on the Overall Ratings page, a pop-up message will appear.

1. Select Submit a second time to confirm your goal of sending your self-rating to your manager. Click Cancel if you wish to return at a later date.

Note: Once you click Submit, you will not be able to make changes to this self-rating. As you return to the Cornerstone landing page, you’ll know you were successful if there are no tasks listed in the “Your Task” area.

If you’d like to print a copy of what you submitted, go to the hamburger menu (three horizontal lines at top right corner of landing page), Scheduled Tasks, click the “Show completed & expired tasks” box and click on the “Complete (Annual Review) Self Review and then Acknowledge” file name. Here you could go to options in the top right corner to print review.

After your manager provides a final rating and discusses your accomplishments with you, return here for a final step to “Acknowledge” that the ratings were shared with you.
Annual Review:
Acknowledging Your Final Ratings Were Shared With You
Contact your HR Consultant with any questions
The Annual Review process has 3 steps and requires that goals were approved for the start of the performance year in the “Annual Performance Plan”. This year, goals were set for a short period of 4/1/22 – 9/30/22. The steps and deadlines are:

- Employee Self Review (due 9/30/22)
- Manager Review (due 10/21/22)
- Employee Acknowledgement (due 10/24/22)

To begin the Employee Acknowledgement, use your WSU Access ID and password to log into the system with this working link: Academica > Employee Resources > Administrative Systems > Cornerstone Conversations.

1. Under “Your Tasks”, click Complete (Annual Review) Self Review and then Acknowledge

Note: this landing page may look different over time as additional Cornerstone modules are implemented.
To get started with your Employee Acknowledgement:

1. Click on Get Started. From here, you will be taken to your Performance Goals screen.

Note:

   a. A menu shares the total number of web pages included for the Employee Acknowledgement.
   
   b. The calendar year timeframe shown below your name and title is merely a system default – the rating period is for goals from 4/1/22 – 9/30/22.
   
   c. The options drop down offers an opportunity to:
      
      • Reference one-on-one meeting documentation in “View Check In’s” if you took advantage of this system feature during the performance year. If not, but you’d like to learn more about it for next year, see this brief video. (To access, log in to Academica, Employee Resources, Other Resources, Accelerate. Click this link once to be brought to the landing page, then a second time to be brought to the video.)
      
      • Print your completed self-review
      
      • See your progress as you move through this process. Each time you open a page, you’ll be 20% closer to completion.
On the Performance Goals screen, for each approved goal you can view:

1. **Manager rating.** Click on the green circle question mark for rating definitions.
2. **Manager rating and comments,** if provided, as well as your own self-rating and comments, if provided.
3. Click **Next** to proceed to next page or **Exit** to return at a later date.

**Note:** if NO goals appear on this page, it because goals were not submitted and/or approved by your manager in the “Annual Performance Plan”.
On the **WSU Values** screen, you can view:

1. **Manager rating** for overall rating of behavior alignment with WSU values. Click on the green circle question mark for **rating definitions**.

2. **Manager rating and comments**, if provided, as well as your own **self-rating and comments**, if provided.

3. Click **Next** to proceed to next page or **Exit** to return at a later date.
If you had professional development goals in your Annual Performance Plan and added comments in the Annual Review, they would be viewable on this page along with your manager’s feedback, if provided. There was no rating for this section.

1. View your and your manager’s comments on **learning goals**, if provided.

2. View your and your manager’s comments on **learning activity achievements**, if provided.

3. Click **Next** to proceed to next page or **Exit** to return at a later date.

*Note: if you did not have any learning goals as shown in this example, simply proceed with the Next button.*
If you had career development goals in your Annual Performance Plan and added comments in the Annual Review, they would be viewable on this page along with your manager’s comments, if provided. There was no rating for this section.

1. View your and your manager’s comments on career goals and learning, if provided.

2. Click Next to proceed to next page or Exit to return at a later date.

Note: if you did not have any learning goals as shown in this example, simply proceed with the Next button.
On the **Overall Performance Rating** screen, you can view:

1. **Manager rating** for overall, combined rating of performance achievements and behavior alignment with WSU values. Click on the green circle question mark for rating definitions.
2. **Manager rating and comments**, if provided, as well as your own **self-rating and comments**, if provided.
3. Click **Next** to proceed to next page or **Exit** to return at a later date.

**Note:** if you did not have any performance goals to rate on the "Performance Goal" page of this Annual Review process, this page would reflect performance achievements for goals agreed upon outside of this system.
To submit an acknowledgement of this process:

1. Type your name to sign this form. Add comments if desired.

2. Click Submit to confirm that you have viewed these ratings and spoke with your manager. Click Save and Exit if you wish to return at a later date.

   If you click submit, a pop-up message will appear to confirm. Click submit once more.

Note: Once you click submit, you will not be able to make changes to this acknowledgement. As you return to the Cornerstone landing page, you’ll know you were successful if there are no tasks listed in the “Your Task” area.

If you’d like to print a copy of what you submitted, go to the hamburger menu (three horizontal lines at top right corner of landing page), Scheduled Tasks, click the “Show completed & expired tasks” box and click on the “Complete (Annual Review) Self Review and then Acknowledge” file name. Here you could go to options in the top right corner to print review.

This was the final step in this process.
Resources

**Learning Support** (website: https://hr.wayne.edu/performance/resources)

Find: Instructor-led sessions on the TSW

Accelerate, on-demand learning

**Regional Support**

Click: **HR Consultants** (website: https://hr.wayne.edu/clientservices/about/contact)

**C&IT Help Desk** (website: https://tech.wayne.edu/helpdesk) Ph. 313-577-4357

For assistance with Academica links, internet browsers, etc.