Instructions for navigating the Cornerstone system to share manager input on employee progress in the Mid-Year Check In process

May 2023
Table of Contents

Leaders must complete the second step in the below Mid-Year Check In process, providing feedback on employee progress to date and the degree to which the individual is prepared for end-of-year success for those in Cornerstone Conversation’s Performance Management process today (Executives, Managers, Academic Administrators, Researchers, Non-Represented Staff, and Staff Association members).

This job aid supports leaders with using Cornerstone for this step.

**Mid-Year Check Process Steps:**

1. Employee Input
2. **Manager Input** (starts on page 3)
3. Employee Acknowledgement
Mid-Year Check In:
Manager Input
It can be helpful to have a copy of the employee’s approved Annual Performance Plan for reference before you begin.

1. Log in via Academica, Employee Resources, Administrative Systems, Cornerstone Conversation. Click on the 3 horizontal lines on home page.

2. Select Performance, Performance Reviews

3. Check the completed box in Status. Click on the title of the Annual Performance Planning form for the appropriate performance year. Then, click on the Option button in top right corner of any page of that Plan to Print Review, if desired.

If the Plan doesn’t appear in the list of available options, select other status boxes as well to open the original Performance Plan. Click on the title of it to review the Overview page. If it does NOT have a green check mark next to “Manager Goal Review” and/or you don’t see your (or a prior) manager’s signature on the last page, goals were not yet approved.

To approve goals BEFORE completing the Mid-Year Check In, see instructions in the Annual Performance Planning: Leader Cornerstone User Guide.

You might also check your Inbox on your Cornerstone Home Page for individual goal update requests.

Alternatively you could provide a summary of feedback on the Mid-Year Status page WITHOUT providing prior goal approval. However, when the Annual Review begins at the start of the fiscal year, it will be a similar experience of not having approved goals pre-populate that form.

Finally, if you have been documenting one-on-one conversations using Cornerstone Touch Points, it may be helpful to review those notes as well.
To begin the Manager Input step of the Mid-Year Check In, return to the Cornerstone Conversation home page by clicking on the WSU logo in left corner.

1. The **Instructions area** provides an overview of the new performance process and includes a link to learning opportunities and resources to help you throughout the year.

2. Your **Inbox** will reflect messages pertinent to performance management, such as feedback or goal approval requests.

3. The **Your Tasks** area links to the three main tasks (Goal Planning, Mid-Year Check In, and Annual Review) that 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 "**Complete Manager Mid-Year Check In for (Employee Name)**" link.
This is the first screen you will see when you click on “Complete Mid-Year Check In for (Employee Name)” from the Cornerstone home page.

1. The **left sidebar** helps you keep track of where you are in the Mid-Year Check In Process, comprised of 6 steps.
   - The section you are currently in will be highlighted in white.
   - Completed sections are marked with a green check.

2. The **Overview area** provides the goals of this process as well as learning resources.

3. This **Review Step Progression** shows you that there are just 3 steps in this process & the due dates for each:
   - 1) Employee Input
   - 2) Manager Input
   - 3) Employee Acknowledgement

4. This **progress meter** indicates the percentage of pages viewed in this process – each page is worth 17% (or 1 out of 6 steps/pages total).

5. The **Options drop down menu** allows you to complete the process offline in Excel and upload it into the system when you’re able as well as the ability to print “reviewee” version if helpful. You might wait to print the final (Mid-Year Check In) review until it is complete with your feedback.

6. The **Get Started button** will take you to the Performance Goals Check In step. The **Reopen Step button** allows you to return the Mid-Year Check In to the employee for change prior to your feedback. See page 5 for instructions.
The “Reopen Step” (available on the Overview page) is available for those managers who wish to return the Mid-Year Check In to the employee for change/s prior to providing their feedback.

After clicking the Reopen Step button (shown on page 5):

1. Click in the radio button next to “Employee Input: Mid-Year Check In” to select this Cornerstone ‘task’ with a check mark.
2. Provide comments about the change/s you’re requesting.
3. Click Save to send the employee an email request.
On this page you will share feedback on the employee’s progress made on each approved performance goal and the degree to which you feel the individual is prepared for end-of-year success.

1. Review each approved goal. Note: If you don’t see any goals listed – check that they were approved (see page 4) AND that their start date and end date ranges are within the current performance year. Use the Select drop down menu to share the degree to which you believe the individual is prepared for end-of-year success based upon progress to date & accomplishments achieved. Note: this is NOT a rating (even though the Cornerstone system may use that word as a default that couldn’t be changed – it is merely a progress check in to ensure individual is prepared for end-of-year success).

2. Refer to the progress scale definitions by clicking on the green question mark.

3. Review employee input with a numeric progress indicator (not a formal rating) and comments in the gray shaded box.

4. Click on drop down arrow to view goal updates made throughout the year (comments or attachments). You might also refer to Cornerstone Touch Point meeting notes if available. Note: the manage goals area allows you to edit this goal directly as appropriate. However, you might also request the employee make edits first for your approval, then provide your feedback here.

5. Insert comments as you wish. Then save. The Save and Continue button allows you to advance to the next step; use Save and Exit if you wish to leave and return at a later time. If you click Back after typing in changes, it will NOT save.
Mid-Year Check In – Manager Input

WSU Values Check In

On this page you will share the degree to which you feel the employee has been able to consistently demonstrate the best practice behaviors for living our WSU values.

Here you are asked to reflect on how the individual achieves their work, not just the accomplishments they attained.

1. Once you have reviewed each value, click the Select drop down menu to share the overall degree to which the individual’s behaviors have consistently aligned with them. Note: this is NOT a rating (even though the Cornerstone system may use that word as a default that couldn’t be changed – it is merely a progress check in to ensure individual is prepared for end-of-year success).

2. Click on green question mark for a definition of each progress indicator.

3. Review employee input with numeric progress indicator and comments in the gray shaded box.

4. Include your feedback in the comments area, such as example/s of how individual approaches to their work embodies the WSU values. This is a required field.

5. Then, save your work. The Save and Continue button allows you to advance to the next step; use Save and Exit if you wish to leave and return at a later time. If you click Back after typing in changes, it will NOT save.
On this page you will provide feedback on the employee’s learning & development goals and progress to date.

It can be helpful to have a copy of the individual’s approved Annual Performance Plan for reference as you recall their approved professional development goals. Click on the 3 horizontal lines on home page, Performance, Performance Reviews, completed & expired status. These goals DID NOT auto-populate into this section.

Just three questions are posed for your input after you view the employee’s comments (if provided) in the gray shaded box:

1. Any updates or support for the individual’s learning & development goal/s set at the start of the performance year. These would highlight things helpful to learn to improve their ability to successfully achieve performance goals and/or things they might teach others.

2. Feedback on the activities completed so far to obtain this learning and ways in which they might have applied it on-the-job.

3. Ways you could provide support or advice as they continue their learning.

4. Then, save your work. The Save and Continue button allows you to advance to the next step; use Save and Exit if you wish to leave and return at a later time. If you click Back after typing in changes, it will NOT save.
Mid-Year Check In – Manager Input
Career Development Check In

On this page you will provide feedback on the employee's career development goals and progress to date.

It can be helpful to have a copy of the individual’s approved Annual Performance Plan for reference as you recall their approved professional development goals. Click on the 3 horizontal lines on home page, Performance, Performance Reviews, completed & expired status. These goals DID NOT auto-populate into this section.

1. Review employee comments in the gray shaded box and share your own comments of support. It may be helpful to return to the original prompts for this in the goal setting period including:

   What professional aspirations do you have? Is there a space in which you would excel, and you would like more exposure to? What job skills would you like to grow into? How do they relate to your strengths and the work you are energized by? What does your long-term career vision look like?

2. Then, save your work. The Save and Continue button allows you to advance to the next step; use Save and Exit if you wish to leave and return at a later time. If you click back after typing in changes, it will NOT save.
On this page you will share an overall progress indicator on the degree to which you feel the employee is prepared for end-of-year success based upon performance goal achievements, the ways in which they live our WSU values, and any learning & development activities completed.

1. Click the **Select drop down menu** to pick the one overall progress indicator that best summarizes the past six months of performance.

2. Click on **green question mark** for a definition of each progress indicator.

   Note: this is NOT a rating (even though the Cornerstone system may use that word as a default that couldn’t be changed – it is merely your progress to ensure you’re prepared for end-of-year success).

3. Review **employee input** with numeric progress indicator and comments in the gray shaded box.

4. Include in the **comments** area example/s of why you selected this indicator. This is a required field.

5. Then, save your work. The **Submit** button allows you to advance to the next step; use **Save and Exit** if you wish to leave and return at a later time. If you click **Back** after typing in changes, it will NOT save.
This is the final screen you will see once you have reviewed employee input on all pages of this Mid-Year Check In process.

1. Type your name and click the **Sign button** in order to submit your input.

   Add **comments** if desired. Review any **employee comments** if provided in the gray shaded box.

2. Click **Submit** to complete the review. A pop-up message will appear requesting you to click submit a second time as confirmation.

   Prior to clicking submit you may choose to click on **“Option”** at the top right of any page and “Print Review” to have a copy for your records. It is also available to view by clicking on the 3 horizontal lines of your Cornerstone landing page, Performance, Performance Reviews, show completed status.
Resources

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

Find:  
- Instructor-led sessions  
- Recorded webinars  
  - Mid-Year Check In Video Overview: **Employee Input** (appx. 15 minutes)  
  - Mid-Year Check In Video Overview: **Leader Input** (appx. 14 minutes)  
  - Mid-Year Check In Video Overview: **Employee Acknowledgement** (appx. 6 minutes)

**Regional Support**

Ask ?’s:  
**HR Consultants**