



Mid-Year Check In:

Leader Cornerstone User Manual

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

May 2023

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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:

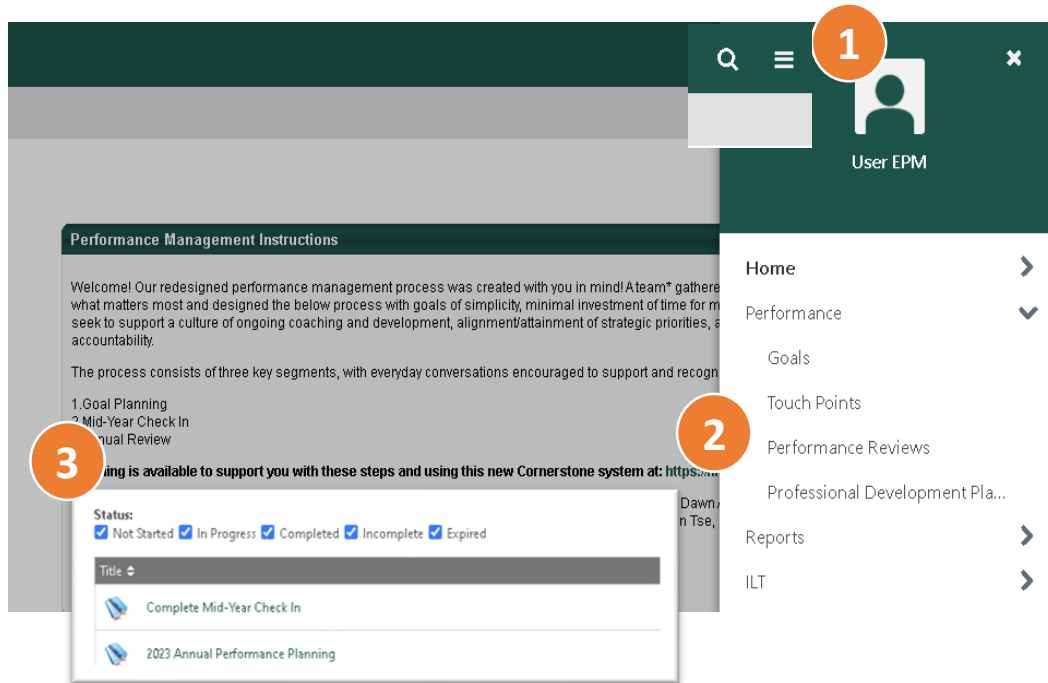
1. Employee Input
2. Manager Input (starts on page 3)
3. Employee Acknowledgement

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.



Mid-Year Check In – Manager Input Cornerstone Performance Management Home Page



1 Performance Management Instructions

Welcome! Our redesigned performance management process was created with you in mind! A team* gathered feedback across the Campus community to hear what matters most and designed the below process with goals of simplicity, minimal investment of time for maximum value, and fairness in mind. In the end we seek to support a culture of ongoing coaching and development, alignment/attainment of strategic priorities, and even higher levels of engagement and accountability.

The process consists of three key segments, with everyday conversations encouraged to support and recognize success:

- 1.Goal Planning
- 2.Mid-Year Check In
- 3.Annual Review

Learning is available to support you with these steps and using this new Cornerstone system at: <https://hr.wayne.edu/performance>

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2 Wayne Talent Career Site

To sign into the *Wayne Talent Career Site* as an applicant using your WSU AccessID, click [here](#).

3 Your Inbox

View transcript
(0 approved training selection(s))
(Registered for 0 training selection(s))

Your Tasks

	Due Date
Complete Manager Mid-Year Check In for User EPM	7/14/2023

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.



The screenshot shows the '2023 Mid-Year Check In - NRNA' overview screen. It features a left sidebar with navigation items: Overview (highlighted), Performance Goal Check In, WSU Values Check In, Professional Development, Career Development, Mid-Year Status, and Acknowledgement. The main content area includes a user profile for 'User EPM' (10/1/2022 - 9/30/2023), a progress meter showing 0%, and a 'Review Step Progression' section with three steps: 'Employee Input: Mid-Year Check In' (completed), 'Manager Mid-Year Check In' (due 7/14/2023), and 'Employee Acknowledgement'. At the bottom, there are 'Reopen Step' and 'Get Started' buttons.

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.



Mid-Year Check In – Manager Input Optional: Reopen Step

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.

Reopen Previous Review Step ×

You may only reopen 1 review step at a time. Only steps that have a status of Complete or Past Due will appear.

1 Employee Input: Mid-Year Check In

Comment for reviewer 2

3

Cancel Save

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.

The screenshot shows the 'Performance Goal Check In' interface. On the left is a navigation menu with items: Overview, Performance Goal Check In (highlighted), WSU Values Check In, Professional Development, Career Development, Mid-Year Status, and Acknowledgments. The main content area is titled 'Budget Reporting' and includes a progress bar at 50%, status 'On Track', start date '10/1/2022', due date '9/30/2023', and a weight of 100%. A 'Select' dropdown menu is highlighted with callout 1. A 'Rating Scale' pop-up window is shown with callout 2, containing a table with the following data:

Rating	Description
At Risk	Barriers prevent successful, on-time goal attainment
Behind Schedule	Obstacles experienced which may delay goal attainment
On Track	On track for successful, on-time goal attainment
Complete	Goal has been attained

Below the rating scale is a 'Comments' section with a text editor and a user profile for 'User EPM (Self)'. Callout 3 points to the text editor. Callout 4 points to the 'Select' dropdown. Callout 5 points to the 'Save and Continue' button at the bottom right. Other buttons include 'Back', 'Save and Exit', and 'Save and Continue'.

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

The screenshot shows a web interface for a mid-year check-in. On the left is a navigation sidebar with items: Overview, Performance Goal Che..., WSU Value (1), Professional D..., Career Development (...), Mid-Year Stat..., and Acknowled... (3). The main content area has a 'Rating Scale' pop-up window (2) with three options: 'Not Aligned', 'Inconsistent Alignment', and 'Aligned'. Below this is a 'Select' dropdown menu (1) with the same three options. The user's input is shown as 'User EPM (Self) Rated : 3 - Aligned' with a comment 'I believe I've lived our value of collaboration....' (4). At the bottom are three buttons: 'Back', 'Save and Exit', and 'Save and Continue' (5). A rich text editor toolbar is visible above the comment box.

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.



The screenshot shows a web interface for a 'Professional Development Check In'. On the left is a navigation sidebar with five items: 'Overview', 'Performance Goal Che...', 'WSU Values Check In', 'Professional Develop...', and 'Career Development (...)'. The main content area has three sections, each with a question and a text input field:

- Section 1:** Question: "What learning and development goals did you set to help you successfully reach your performance goals this year?" Comment: "User EPM (Self) Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:48 PM I set out to learn more about Excel...".
- Section 2:** Question: "What progress have you made? In what way has this learning helped you to accomplish your performance goals in new or better ways? What changes to your learning and development plans are needed to achieve success?" Comment: "User EPM (Self) Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:48 PM I completed Accelerate eLearning courses...".
- Section 3:** Question: "What support would be helpful, if any?" Comment: "User EPM (Self) Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:48 PM XXXX".

At the bottom of the form are three buttons: 'Back', 'Save and Exit', and 'Save and Continue'. A fourth callout '4' points to the 'Save and Continue' button.

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.



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.

Instructions for Employee:

- Review any initial goals for ongoing career growth at WSU shared at the start of the performance year.
- Prepare for a discussion to highlight how your goals are evolving as you undertake learning and development experiences.
- Reflect on ways your manager and others might support your continued development. Two resources that may be helpful as you explore career goals/plans more include:
 - Accelerate’s “Staff Career Conversations” folder provides great books, courses and other learning resources to support career goal planning. Log in to Academics, Employee Resources, Other Resources, Accelerate Employee Development Tools, Featured Topics (in left menu of home page).
 - WSU’s Career Development Planner provides goal prompts and a development plan template.

Instructions for Manager:

- Prepare for a discussion about the below career goals.
- Reflect on questions you might ask to learn more about how goals may have evolved over time and ways in which you can provide support/championship. Two resources that may be helpful include:
 - Accelerate’s “Leader Career Conversations” folder provides great books, courses and other learning resources to support career goal planning. Log in to Academics, Employee Resources, Other Resources, Accelerate Employee Development Tools, Featured Topics (in left menu of home page).
 - WSU’s Career Development Leader Discussion Planner provides thought-starter questions and agenda templates.

Comments

Comments:
User EPM (Self) Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:48 PM

Rich text editor toolbar: B I U S x₂ x² I_x [bulleted list] [numbered list] [link] [unlink] [font] [size] [color] [background color]

Buttons: Back, Save and Exit, Save and Continue

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.



Mid-Year Status

As you consider progress-to-date on performance goals, how do you feel prepared for end-of-year success using the below progress indicator?

- **At Risk: Barriers prevent successful, on-time goal attainment.**
- **Behind Schedule: Obstacles experienced which may delay goal attainment and/or some behaviors may be inconsistently aligned with WSU value/s.**
- **On track: On track for successful, on-time goal attainment and behaviors consistently align with WSU values.**

Please select the Mid-Year progress indicator:

1. Select

2. Select

3. Select

4. Comments

5. Save and Continue

Rating	Description
Red - At Risk	Barriers prevent successful, on-time goal attainment and/or behaviors are not aligned with WSU value/s
Yellow - Behind Schedule	Obstacles experienced which may delay goal attainment and/or some behaviors may be inconsistently aligned with WSU value/s
Green - On Track	On track for successful, on-time goal attainment and behaviors consistently align with WSU values

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.



Acknowledgement

Instructions for Employees:
Please provide an e-signature to signal that your input for the Mid-Year Check In is now complete.

Instructions for Manager:
Please provide an e-signature to indicate that you have had a discussion to share feedback and approve the mid-year status.

Self
Pending Signature

Manager
 Sign

Comment

B I U S Ix [List Icons] [ABC]

Submit

Back Save and Exit Submit

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>)

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**