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

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Employees who are in Cornerstone Conversation’s Performance Management process today (Executives, Managers, Academic Administrators, Researchers, Non-Represented Staff, and Staff Association members) must complete the first and last step in the below Mid-Year Check In process, including sharing progress to date & the degree to which they feel prepared for end-of-year success and acknowledging receipt of feedback.

This job aid supports staff with using Cornerstone for both of those steps.

**Mid-Year Check Process Steps:**

1. Employee Input (starts on page 3)
2. Manager Input
3. Employee Acknowledgement (starts on page 13)
Mid-Year Check In:
Employee Input
It can be helpful to have a copy of your 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, your goals were not yet approved.

If goals aren’t approved, you might seek to connect with your manager to validate them first as well as share overall comments on the Mid-Year Status page without goal approval.

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 Employee 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 Mid-Year Check In**" link.
This is the first screen you will see when you click on “Complete Mid-Year Check In” 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 view Touch Point one-on-one meeting notes (aka “Check Ins”) and print the final document with your input once you’re complete.

6. The **Get Started button** will take you to the Performance Goals Check In step.
On this page you will share the progress you’ve made on each approved performance goal and the degree to which you feel 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.

2. Click on **manage goals** to make edits, such as sliding your progress bar forward or modifying dates, or click on **comments** or **attachments** to view goal updates already made. Note: some goal changes require manager approval, including date updates, deleting the goal entirely or modifying the title.

3. Use the **Select drop down menu** to share the degree to which you believe you’re 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 you are prepared for end-of-year success).

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

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

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

1. Once you have reviewed each value, click the Select drop down menu to share the degree to which your 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 you’re prepared for end-of-year success).

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

3. Include in the comments area example/s of how your approach to your work embodied the WSU values. This is a required field.

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 share a reminder of the learning & development goals you have set for gaining knowledge/skill helpful to you in your current role as well as activities completed to-date.

It can be helpful to have a copy of your approved Annual Performance Plan for reference as you recall your 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:

1. A reminder about your **learning & development goal/s** set at the start of the performance year. These would highlight things you would like to learn to improve your ability to successfully achieve your performance goals and/or things you might teach others.

2. **Activities completed so far** to obtain this learning and ways in which you might have applied it on-the-job and/or new ideas that are surfacing as you consider more effective & efficient ways to accomplish your goals as a result of it.

3. **Manager support** helpful – or merely advice you seek – as you continue your 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.
Career Development (Optional)

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 may 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.

1. As you jot down comments, consider if/how your aspirations are evolving as the year continues and ways in which your manager may be able to support you. 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 prepared for end-of-year success based upon performance goal achievements, the ways in which you 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 a progress check in to ensure you’re prepared for end-of-year success).

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

4. 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 completed all the sections of this first step in the Mid-Year Check In process.

1. Click **Submit** to share this progress/input with your manager and spark a discussion as well as their own input.

Note: Once this plan is submitted, you will NOT have the opportunity to make any further edits. Your manager, however, could reopen (this) step and send this back to you for changes if you ask them. When they click on “Complete Mid-Year Check In for (your name)” from their Cornerstone Conversations landing page, the first “Overview” page allows this option at the bottom right with a button called, **Reopen Step** (see Mid-Year Check In: Leader Cornerstone User Manual for instructions, page 7).

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.
Mid-Year Check In: Employee Acknowledgement
To begin the Employee Acknowledgement step of the Mid-Year Check In, log via Academica, Employee Resources, Administrative Systems, Cornerstone Conversations.

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 Mid-Year Check In”** link.
After your manager provides input, an email will be sent requesting you to acknowledge receipt of it. This is the first screen you will see when you click on “Complete Mid-Year Check In” 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. You have already provided input and completed the first 5 steps. Acknowledgement is the final step.

2. This **“Review Step Progression”** shows you that the first two steps in this process were completed and provides a due date for this final step.

3. 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).

4. The **Get Started button** will take you to the Performance Goals Check In page to view manager input.
On this page you’ll be able to view manager input on your progress for each approved performance goal.

1. Review **manager input** for each goal in the gray shaded box below it, including the numeric progress indicator (not a formal rating, this is a default term in the Cornerstone system that could not be changed) as well as any comments. Numeric indicators include:

   - **1: At Risk** (barriers prevent successful on-time goal attainment)
   - **2: Behind Schedule** (obstacles experienced which may delay goal attainment)
   - **3: On Track** (on track for successful, on-time goal attainment)
   - **4: Complete** (goal has been attained)

   Note: if you wish to comment on manager input, there is space available on the **Mid-Year Status and Acknowledgement** pages.

2. Remind yourself about your **own input** for the goal.

3. Click **Next** to advance to the next page; use **Exit** if you wish to leave and return at a later time or **Back** to view prior page/s.
On this page you’ll be able to view manager input on the degree to which your behaviors embody the WSU values.

1. Review manager input for how consistently you’ve lived the WSU values in total in the gray shaded box below it, including the numeric progress indicator (not a formal rating, this is a default term in the Cornerstone system that could not be changed) as well as any comments. Numeric indicators include:

   **1: Not Aligned** (employee has not displayed satisfactory alignment to the WSU values. Immediate improvement is needed.)

   **2: Inconsistent Alignment** (employee does not consistently demonstrate alignment to some or all of the WSU values. There is an opportunity for improvement.)

   **3: Aligned** (Employee demonstrates that they embrace the WSU values by using them as guidance on how they approach and accomplish their work, interact with others, strive to have a positive impact to the University and the accomplishment of its strategic plan.)

   Note: if you wish to comment on manager input, there is space available on the *Mid-Year Status and Acknowledgement* pages.

2. Remind yourself about your own input for the goal.

3. Click Next to advance to the next page; use Exit if you wish to leave and return at a later time or Back to view prior page/s.
On this page you’ll be able to view manager input on the learning & development goals you’ve set and progress you’ve attained.

1. Review **manager input** for each of the three questions about your learning goals and progress in the gray shaded box below each question. If this is left blank, it is because the manager opted to not provide input.

2. Remind yourself about your **own input** for each question. If this is left blank, it is because you opted to not provide input.

3. Click **Next** to advance to the next page; use **Exit** if you wish to leave and return at a later time or **Back** to view prior page/s.
On this page you’ll be able to view manager input on the career development goals you’ve set and progress you’ve attained.

1. Review **manager input** as one set of overall feedback on your career development goals and progress in the gray shaded box. If this is left blank, it is because the manager opted to not provide input.

2. Remind yourself about your **own input**. If this is left blank, it is because you opted to not provide input.

3. Click **Next** to advance to the next page; use **Exit** if you wish to leave and return at a later time or **Back** to view prior page/s.
On this page you’ll be able to view manager input on overall Mid-Year progress, values, and learning and development accomplishments and preparation for end-of-year success.

1. Review **manager input** in the gray shaded box below it, including the numeric progress indicator (not a formal rating, this is a default term in the Cornerstone system that could not be changed) as well as any comments. Numeric indicators include:

   **1: Red – At Risk** (barriers prevent successful, on-time goal attainment and/or behaviors are not aligned with WSU values.)

   **2: Yellow – Behind Schedule** (Obstacles experienced which may delay goal attainment and/or some behaviors may be inconsistently aligned with WSU values.)

   **3: Green – On Track** (On track for successful, on-time goal attainment and behaviors consistently align with WSU values.)

2. Remind yourself about your **own input**. Add **comments** if you wish.

3. Click **Next** to advance to the next page; use **Exit** if you wish to leave and return at a later time or **Back** to view prior page/s.
This is the final screen you will see once you have reviewed manager input on all pages of this Mid-Year Check In process.

1. Type your name to **Sign** in order to acknowledge receipt of this feedback. This is not an agreement of all input, merely a confirmation that you received it.

2. Add **comments** if desired.

3. 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.
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** (aprx. 15 minutes)
  - Mid-Year Check In Video Overview: **Leader Input** (aprx. 14 minutes)
  - Mid-Year Check In Video Overview: **Employee Acknowledgement** (aprx. 6 minutes)

**Regional Support**

Ask ?’s:  
- **HR Consultants**