WAYNE STATE
Human Resources

cornerstone
conversations

Mid-Year Check In:
Staff Cornerstone User Manual

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

May 2023

Table of Contents

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.
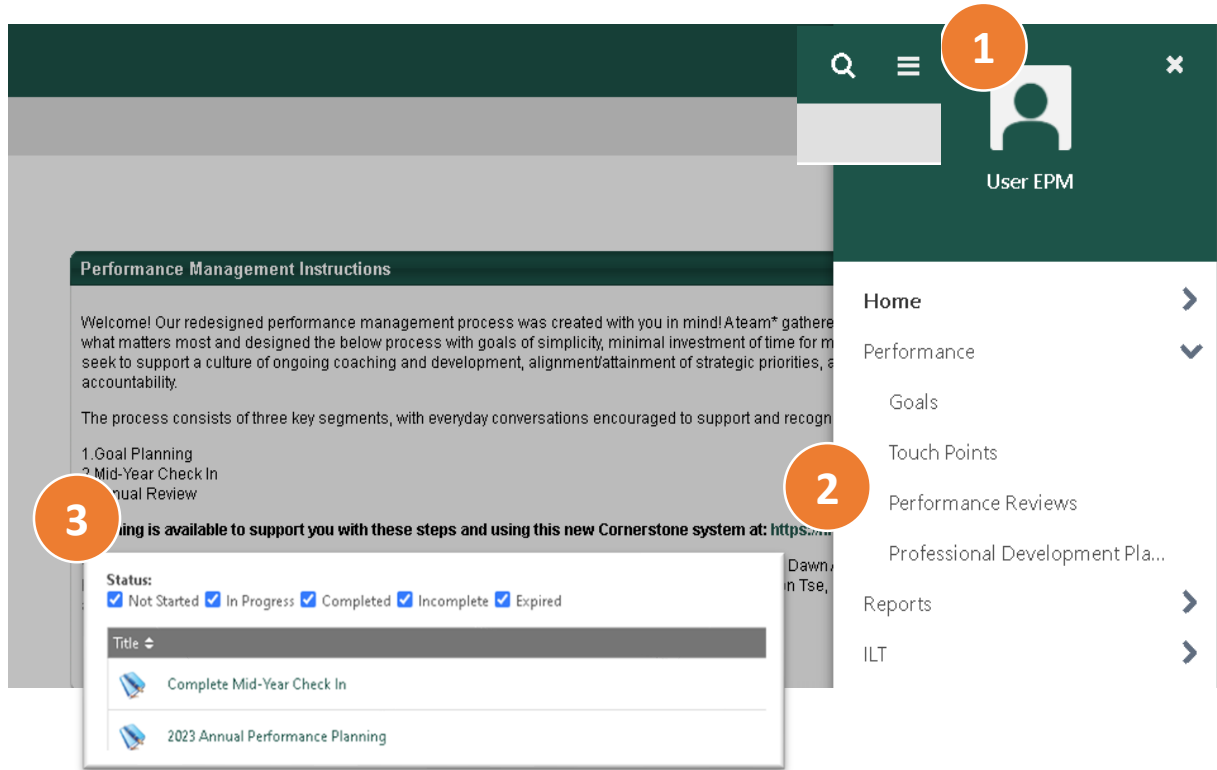
Mid-Year Check Process Steps:

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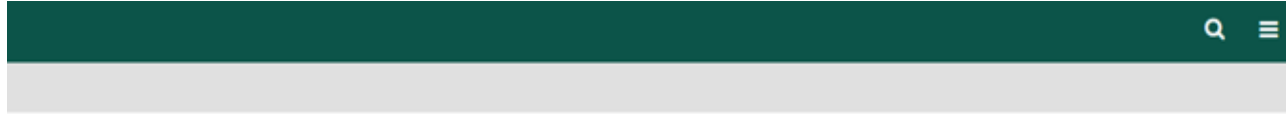
    If the Plan doesn't appear in the list of available options, select other status boxes as well to open the original Performance Plan. Click on the title of it to review the Overview page. If it does NOT have a green check mark next to "Manager Goal Review" and/or you don't see your (or a prior) manager's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

Cornerstone Performance Management Home Page

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.

Mid-Year Check In – Employee Input
Overview Screen

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.

7

WSU Values Check In

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.

Professional Development

Instructions for Employees:

Please share professional development accomplishments below. The following resources may be helpful:

- The Staff Guide to the Mid-Year Check In: This includes how to identify unique strengths, assess learning needs, set SMART learning goals, identify learning strategies and partners, and strategies to implement your plan. It highlights that a rich array of formal and informal learning experiences might be considered to help you reach your goals. Many resources do not require budget.
- Accelerate's Professional Development folder features many great learning resources to support development planning as well as topics such as time management, organization and planning, and embracing a growth mindset. To access it, login to Academica, Employee Resources, Other Resources, Accelerate-Employee Development Tools. Check with your manager to inquire if a budget request is possible pending your needs.

Instructions for Manager:

Please be sure to offer support for plan attainment including coaching, removing obstacles, and ensuring resources are available.

(1) What learning and development goals did you set to help you successfully reach your performance goals this year?

Comments:

(2) 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?

Comments:

(3) What support would be helpful, if any?

Comments:

(4)

Back | Save and Exit | Save and Continue

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.

9

Career Development Check In

cornerstone conversations

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 more include:
  - Accelerate's "Staff Career Conversations" folder provides great books, courses and other learning resources to support career goal planning. Log in to Academica, 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 Academica, 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.

Sidebar navigation:
- Overview
- Performance Goal Che...
- WSU Values Check In
- Professional Develop...
- Career Development (...
- Mid-Year Status
- Acknowledgement

Comments

Comments:

(1)

(2)

Back | Save and Exit | **Save and Continue**

On this page you will share a reminder of any career aspirations you included in your Annual Performance Plan as well as activities completed to-date. Alternatively, you may choose to insert career goals for the first time here to spark a dialogue with your manager.

It can be helpful to have a copy of your approved Annual Performance Plan for reference . Click on the 3 horizontal lines on home page, Performance, Performance Reviews, completed & expired status. Your career development goals were an optional activity for you and your manager at that time and DID NOT auto-populate into this section.

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.

10

Mid-Year Status

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.

11

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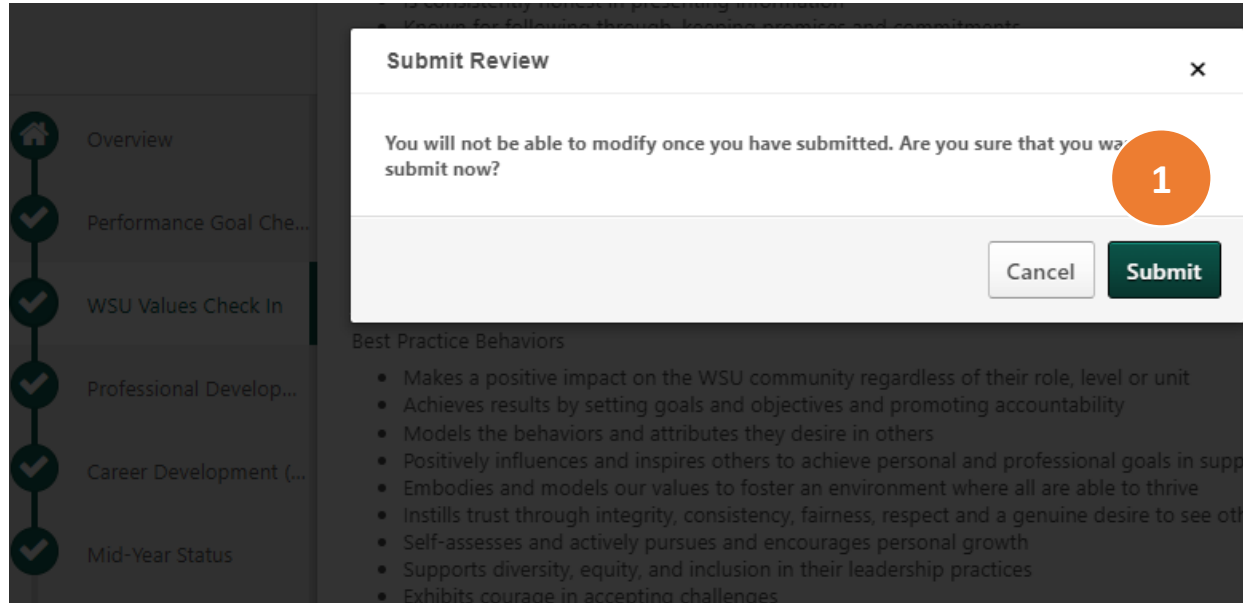
1. Click **Submit** to share this progress/input with your manager and spark a discussion as well as their own input.

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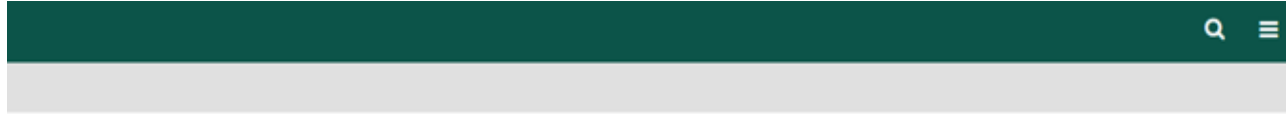
   Prior to clicking submit you may choose to click on **"Option"** at the top right of any page and "Print Review" to have a copy for your records. It is also available to view by clicking on the 3 horizontal lines of your Cornerstone landing page, Performance, Performance Reviews.

12

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.

15

Performance Goal Check In

Please share the current goal status and comments, as applicable, for each performance goal. If goal priorities have changed - please modify these in the My Goals section found by clicking on the Navigation Menu, Performance, Goals. See the Staff Cornerstone User Guide for step-by-step instructions to update goals.

This check in is designed to allow great feedback conversations and position individuals for a successful annual performance review. Please be sure to celebrate accomplishments for completed/on track goals as well as discuss ways to overcome obstacles or modify approaches for goals that are behind schedule or at risk of being attained.

It may be helpful to reference notes from your one-on-one's in preparation for this conversation: see Touch Points in the Nurture Success Staff or Leader Cornerstone User Guide for more. And, please be sure to use the comment space to capture any agreed upon next steps. For goals behind schedule or at risk, we encourage setting a regular check in schedule.

Your HR Consultant is available for questions and support.

Navigation:
- Overview
- Performance Goal Che...
- WSU Values Check In
- Professional Develop...
- Career Development (...
- Mid-Year Status
- Acknowledgement

Budget Reporting

Complete monthly budget accurately and on time and send with a few summary highlights to (Unit Leader) by (date).

Progress : 50%
Status : On Track
Start Date : 10/1/2022
Due Date : 9/30/2023

more...

Weight : 100 %

On Track

Manager EPM (Manager) Rated : 3 - On Track Review : 2023 Mid-Year Check In - NRNA Time : 5/10/2023 4:56 PM
Leader Feedback Here....

User EPM (Self) Rated : 3 - On Track Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:40 PM

Back Exit Next

(1)
(2)
(3)

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.

WSU Values Check In

Integrity:

We keep our word. We live up to our commitments and are accountable regarding out responsibilities and to each other. Ours is a greater calling, and we do what is right for our students, each other, our community and the quest for knowledge.

Best Practice Behaviors

- Always displays a high level of professional, ethical behavior
- Is consistently honest in presenting information
- Known for following through, keeping promises and commitments
- Does not take credit from others - gives credit to others
- Admits mistakes and takes actions to remedy them
- Places the good of the WSU community ahead of individual interests
- Considers organizational impact beyond the short-term and potential impact on others when making decisions
- Instills trust through confidentiality and following through on plans and promises

Leadership:

We are proud of our long history as an anchor institution in Detroit, and will continue to serve our community while playing a lead role in the city's resurgence.

Best Practice Behaviors

- Makes a positive impact on the WSU community regardless of their role, level or unit
- Achieves results by setting goals and objectives and promoting accountability
- Models the behaviors and attributes they desire in others
- Positively influences and inspires others to achieve personal and professional goals in support of Wayne State's mission
- Embodies and models our values to foster an environment where all are able to thrive
- Instills trust through integrity, consistency, fairness, respect and a genuine desire to see others succeed
- Self-assesses and actively pursues and encourages personal growth
- Supports diversity, equity, and inclusion in their leadership practices
- Exhibits courage in accepting challenges

Sidebar navigation:
- Overview
- Performance Goal Che...
- WSU Values Check In
- Professional Develop...
- Career Development (...
- Mid-Year Status
- Acknowledgement

Overall Rating (Required)

Aligned ▾ ❓*

(1) **Manager EPM** (Manager) Rated : 3 - Aligned Review : 2023 Mid-Year Check In - NRNA Time : 5/10/2023 4:58 PM
Leader feedback

(2) **User EPM** (Self) Rated : 3 - Aligned Review : 2023 Mid-Year Check In - NRNA Time : 5/8/2023 12:45 PM **(3)**
I believe I've lived our value of collaboration.....

[Back] [Exit] [Next]

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.

17

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.

18

Career Development Check In

cornerstone
conversations

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.
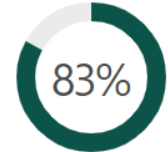
On this page you'll be able to view manager input on overall Mid-Year progress, values, and learning and development accomplishments and preparation for end-of-year success.

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.

20

Goal Planning Acknowledgement

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

<u>Learning Support</u> (website: <u>https://hr.wayne.edu/performance/resources</u>)

Find: Instructor-led sessions

          Recorded webinars

          <u>Mid-Year Check In Video Overview: **Employee Input**</u> (appx. 15 minutes)

          <u>Mid-Year Check In Video Overview: Leader Input</u> (appx. 14 minutes)

          <u>Mid-Year Check In Video Overview: Employee Acknowledgement</u> (appx. 6 minutes)

Regional Support

Ask ?'s: **<u>HR Consultants</u>**