



Cornerstone Performance – Annual Review – Manager

How to Access the Cornerstone System

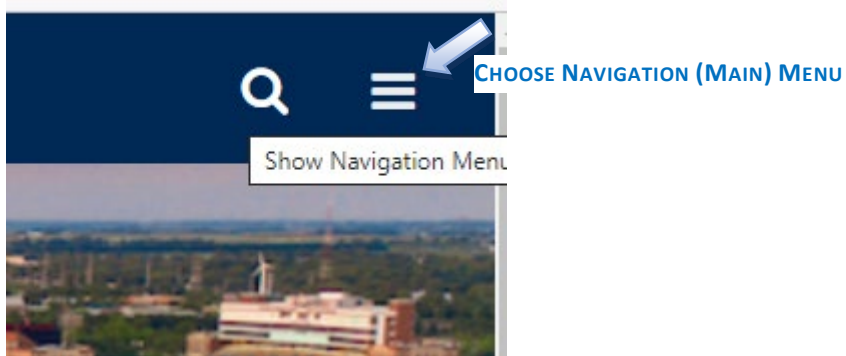
1. Open internet browser and go to <http://go.illinois.edu/cornerstone>
2. Log in to Cornerstone using your net ID and password.

Cornerstone Performance – Annual Review – Manager:

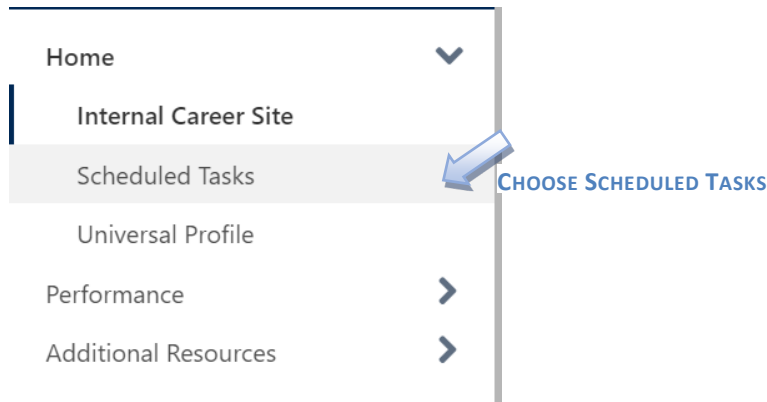
- Use this job aid to learn how to:
 - Access the Scheduled Tasks List
 - Select Competencies
 - Complete the Manager Review
 - Complete the Discussion Step and Sign Off
 - Access the Completed Annual Review
- If you have any questions, please contact ihr-hrais@illinois.edu.

Access the Scheduled Tasks List:

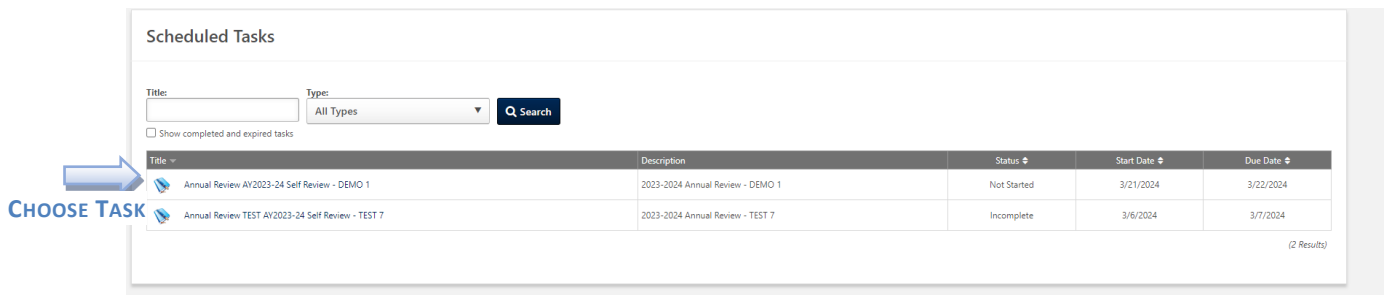
1. From any page in Cornerstone, access the main menu in the upper right corner of the page and choose Home, Scheduled Tasks
 - a. Select the menu:



b. Select Home, Scheduled Tasks:



c. On the Scheduled Tasks page, choose the Annual Review task that you have been assigned. You may enter search criteria to locate a particular task if desired:



Complete the Manager Review:

1. Once you access the form, there is an explanation of the 4 steps that the Annual Review will go through. Select "Get Started" to begin the Manager Review.
 - a. NOTE: There is a Reopen Step button beside the Get Started button. If the employee needs the review to be sent back to them for editing, you can choose Reopen Step to send it back. You will then need to wait until they submit it again to begin the Manager Review process.

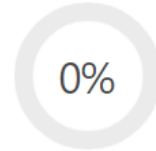
2023-2024 Annual Review - DEMO 1

Options ▾

- Overview
- Goal Rating
- Competencies
- Performance/Professi...
- Overall Performance R...
- Manager Review Sub...
- Sign Off



Employee One
Account Technician I
6/1/2023 - 5/31/2024



Overview

Resources and Job Aids

Job Aids and Training

Video Walkthrough

DESCRIPTION OF THE STEPS

The Annual Review will be a series of 4 steps

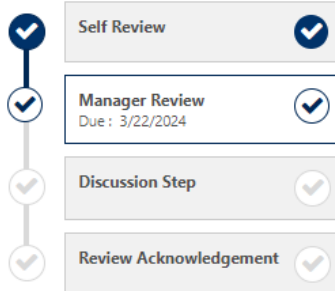
Step 1 - Self Review - Employee will update goal progress as needed and evaluate themselves on the core competencies and any additional selected by the Supervisor. The self-review will be viewable by the Supervisor after the review is submitted.

Step 2 - Manager Review - The manager (supervisor) will enter their evaluation. The employee will not be able to view the evaluation at this time.

Step 3 - Discussion Step - The manager (supervisor) will review the evaluation with the employee and sign the Annual Review form. The employee cannot see the evaluation until the manager submits. Managers are able to make additional comments during the discussion step.

Step 4 - Review Acknowledgement - The Employee signs the Annual Review form.

Review Step Progression



Reopen Step

Get Started

CLICK GET STARTED

- The first page will be any goals that were entered for this reporting period. If no goals were entered during the report period, this page will be blank. You can add comments if desired to the goals and you can also adjust the goals progress by choosing the down arrow in the upper right corner of the goal and select Manage Goals. If there were any attachments or comments added to the goal, you can view them by select Goals: Attachments or Goals: Comments.

The screenshot displays a web interface for a 2023-2024 Annual Review. On the left is a navigation sidebar with options: Overview, Goal Rating (selected), Competencies, Performance/Professi..., Overall Performance R..., and Sign Off. The main header shows '2023-2024 Annual Review - DEMO 1' and an 'Options' dropdown. Below the header, a profile card for 'Employee One' (Account Technician I, 6/1/2023 - 5/31/2024) is shown next to a '0%' progress indicator. The 'Goal Rating' section features a 'Goal #1' card with a manager note: 'This is not goal #1. Of course it is. This is a manager note.' The goal's progress is 81%, with a status of 'In Progress', start date of 1/1/2023, and due date of 6/30/2023. A dropdown menu in the top right of the goal card offers 'Goals : Comments', 'Goals : Attachments', and 'Manage Goals'. A blue arrow points to 'Manage Goals' with the text 'SELECT TO MODIFY GOAL AS NEEDED'. Below the goal card is a 'Comments' section with a rich text editor toolbar and a text input area. A blue arrow points to the input area with the text 'ENTER COMMENTS AS NEEDED'.

3. If you choose to modify the goal, you will be taken to this page. To adjust the progress, you can use the slider bar. Attachments and comments can be added to the goal as well. Choose Done when you are finished with any updates.

Manage Goals

81% **Goal #1**
Status : In Progress Due Date : 6/30/2023

Description :
This is not goal #1. Of course it is. This is a manager note.

Start Date : 1/1/2023

Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1MB

Comments

Add Comment

Done

MOVE SLIDER BAR TO CHANGE PROGRESS

SELECT DONE WHEN FINISHED

4. Once you have made any updates or added comments to the goals, press the Save and Continue button to proceed to the next page. You may choose to select Save and Exit to save your changes and return to the review at a later time.

Test Goal 1

Test Goal 1 - Obtain Certifications

Progress : 50%

Status : In Progress

Start Date : 6/1/2023

Due Date : 5/31/2024

more...

Comments :

PRESS SAVE AND CONTINUE WHEN FINISHED

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

- The next page lists the Competencies for this position type. For each Competency, you can review the employee's self-assessment and respond to their comments and/or add additional comments citing examples of performance indicators that demonstrate the employee's proficiency in each area. You can also comment on any performance indicators that you see as growth opportunities.

2023-2024 Annual Review - DEMO 1 Options ▾

Employee One
Account Technician I
6/1/2023 - 5/31/2024

33%

Competencies

Employee: Please provide comments regarding how you meet each of the following competencies. Click the menu button for each competency heading (downward-facing triangle) and then on "Details" to see a list of performance indicators for each competency.

Managers: Please provide comments regarding how the employee meets (or does not meet) each of the following competencies. Click the menu button for each competency heading (downward-facing triangle) and then on "Details" to see a list of performance indicators for each competency.

Collaboration, Communication, and Dependability ▾ Details

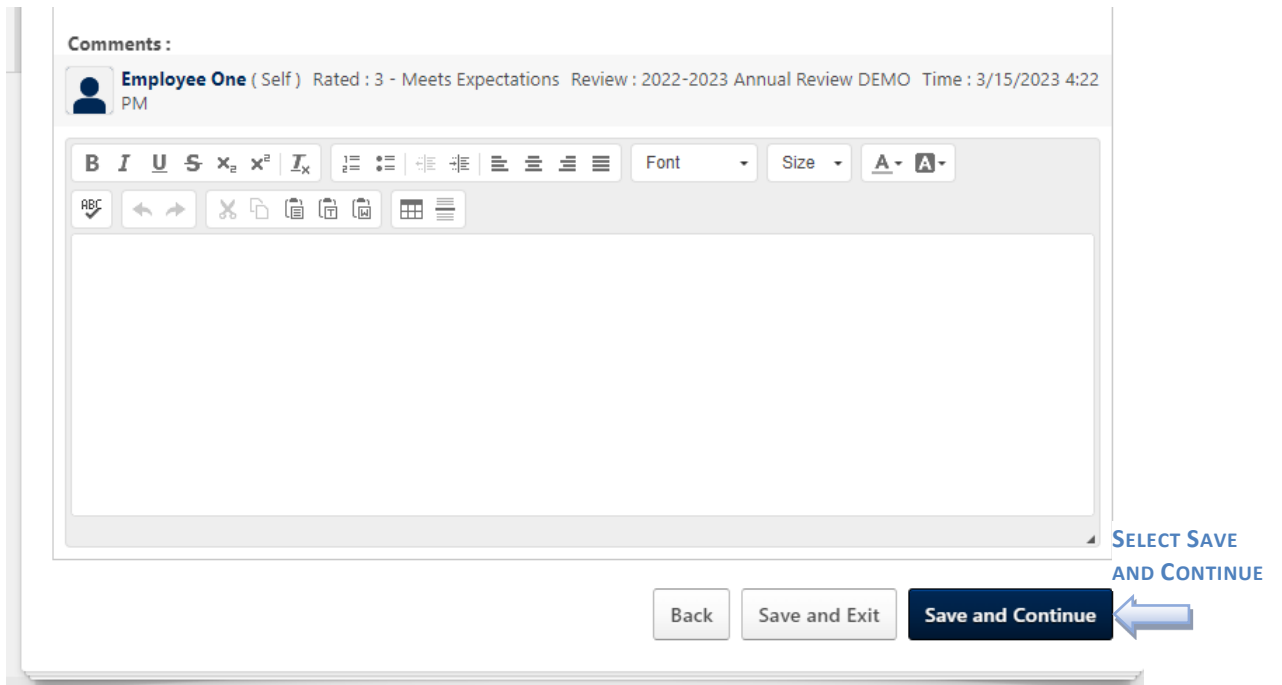
Comments :

B I U S x₂ x² I_x | [List, Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent] | Font - Size - A- A+ | [Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Link, Unlink, Table, Table of Contents]

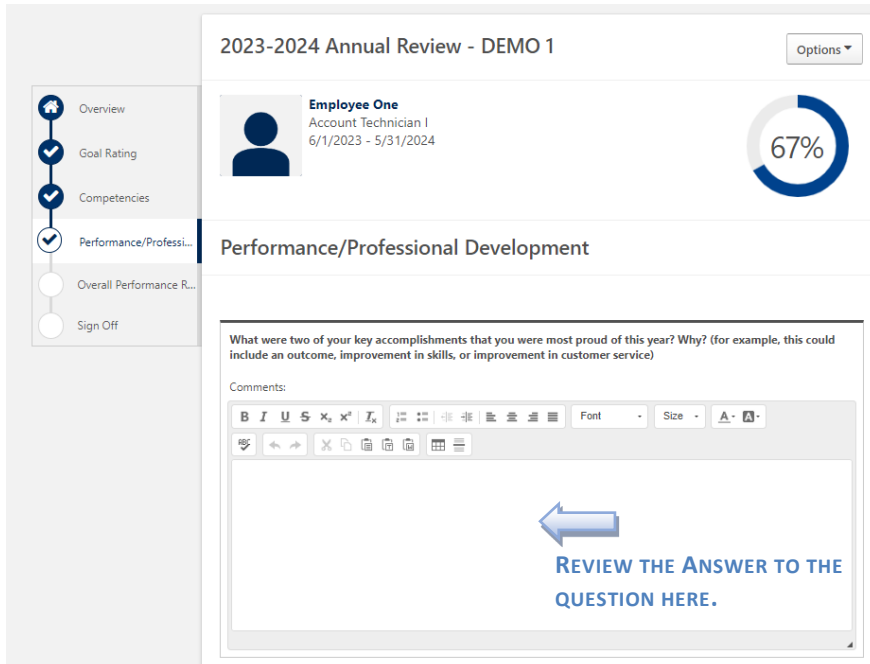
SELECT DETAILS FOR DESCRIPTION OF RATINGS

ENTER COMMENTS

- Once all three competencies have been reviewed, select the Save and Continue button to proceed to the next page.



- The next page will ask you to review your employees' answers to the Performance and Professional Development questions. You can add any comments you wish on this page as well.



8. Press “Save and Continue” when you are finished reviewing this section.
 - a. You can also click on “Save and Exit” if you are not finished and want to come back and make changes before submitting to your supervisor.

What assistance would be helpful from your team or your supervisor to support your success in the coming year?
(Optional)

Comments:

B I U S x_2 x^2 I_x $\frac{1}{2}$ $\frac{1}{3}$ $\frac{1}{4}$ $\frac{1}{5}$ $\frac{1}{6}$ $\frac{1}{7}$ $\frac{1}{8}$ $\frac{1}{9}$ $\frac{1}{10}$ Font Size A- A+

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CLICK “SAVE AND CONTINUE”

9. The next page allows you to choose an overall performance rating. Once selected, choose Save and Continue to proceed to the Summary page. You may choose Submit now to proceed to the next step without reviewing the Summary page.

Rating Comments
When providing comments for a performance review, it's important to be **constructive**. Here are some guidelines for crafting your comments:

1. **Specificity:** Be specific about the employee's achievements and areas for improvement. Instead of general statements like "good job," provide concrete examples of what they did well.
2. **Balance:** Pair any criticisms with positive feedback. This can help motivate the employee to improve while also recognizing their strengths.
3. **Actionable:** Offer clear suggestions for how the employee can improve or continue to excel. This could include training opportunities, resources, or specific goals to work towards.
4. **Objective:** Keep the comments focused on the employee's performance. Stick to facts and observable behaviors.
5. **Future-Oriented:** Frame the feedback in a way that focuses on future performance and growth opportunities.

Next Steps
Step 3 - Discussion Step - The manager (supervisor) will review the evaluation with the employee and sign the Annual Review form. The employee cannot see the evaluation until the manager submits. Managers are able to make additional comments at the discussion step.
Step 4 - Review Acknowledgement - The Employee signs the Annual Review form.

Rate the employee on their overall performance.

Select

SELECT AN OVERALL RATING

Please provide comments for your overall rating.

Comments: *

ADD ANY COMMENTS HERE

Back Save and Exit **Save and Continue**

SELECT SAVE AND CONTINUE

10. The summary page will average the ratings that you have given for the review as well as show the employee's self-review ratings. Press Submit to proceed to the Discussion step. The employee will not be able to view the review during this next step. If you wish to print the review at this time, you can choose Print Review under the Options drop-down. The Print Review and Print Reviewee options will generate the same result. This will download a PDF which can save and/or print.

You will need to click the "Manager Review Submission Confirmation" and click "Submit". Then, you will get a pop-up indicating you cannot modify once you have submitted. If there is a need to modify after you submit, please send email to ihr-hrais@illinois.edu. Press Submit to continue.

2023-2024 Annual Review - DEMO 1 Options ▾

Employee One
Account Technician I
6/1/2023 - 5/31/2024

80%

Manager Review Submission Confirmation

Manager Review Submission Confirmation
Note: As a reminder, this page will appear at the beginning of the Discussion step. Comments and overall rating will not be visible to the employee in Cornerstone until *after* the discussion step. If you wish to provide this information to the employee prior to the discussion step, please save a copy of the review using the "print review" option. You can send that document to the employee prior to your meeting.

Next Steps
Step 3 - Discussion Step - The manager (supervisor) will review the evaluation with the employee and sign the Annual Review form. The employee cannot see the evaluation until the manager submits. Managers are able to make additional comments at the discussion step.
Step 4 - Review Acknowledgement - The Employee signs the Annual Review form.

Manager Review Submission Confirmation
 *

CHECK THIS BOX TO CONFIRM YOU ARE SUBMITTING

Back Save and Exit **Submit**

TO PRINT, SELECT OPTIONS, PRINT REVIEW

PRESS SUBMIT WHEN FINISHED

11. You will receive an email to let you know that Discussion Step has now been assigned. The employee does not currently have access to the review.

Complete the Discussion Step and Sign Off:

1. The Discussion Step occurs when you are meeting with the employee regarding their annual review. You will be able to make changes to goals, competency rating, overall rating, and comments during this step. The Discussion Step and Manage Review Step will have separate rating scores in the overall summary.
2. To access the annual review for the Discussion Step, return to Scheduled Tasks and choose the Annual Review.

Scheduled Tasks

Title: Type: All Types

Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Annual Review TEST AI2023-24 Self Review - TEST 7	2023-2024 Annual Review - TEST 7	Incomplete	3/6/2024	3/7/2024

SELECT TASK

3. To begin the Discussion Step, press Get Started. You will notice there is a Reopen Step button as well. This is used to reopen the Self-Review step if needed. If you would like to print the review at this point, you can choose Options, Print Review.

Overview

Resources and Job Aids

Job Aids and Training

Video Walkthrough

The Annual Review will be a series of 4 steps

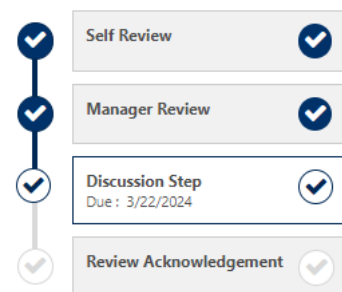
Step 1 - Self Review - Employee will update goal progress as needed and evaluate themselves on the core competencies and any additional selected by the Supervisor. The self-review will be viewable by the Supervisor after the review is submitted.

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Step 4 - Review Acknowledgement - The Employee signs the Annual Review form.

Review Step Progression



**SELECT GET
STARTED**

Reopen Step **Get Started**



4. Goal progress can be updated, and comments can be entered as desired just as they are in the Manager Review step.

2023-2024 Annual Review - DEMO 1 Options ▾

Employee One
Account Technician I
6/1/2023 - 5/31/2024

0%

Goal Rating

Goal #1

This is not goal #1. Of course it is. This is a manager note.

Progress : **81%**

Status : In Progress
Start Date : 1/1/2023
Due Date : 6/30/2023
more...

Comments :


Goals : Comments
Goals : Attachments
Manage Goals

Rich Text Editor: B I U S x₂ x² I_x [List] [Link] [Image] [Table] [Table] [Table] Font - Size - A - A

5. Press Save and Continue to proceed to the next page in the review.

Test Goal 1

Test Goal 1 - Obtain Certifications

Progress :  50%

Status : In Progress

Start Date : 6/1/2023

Due Date : 5/31/2024


more...

Comments :

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Font, Size, Text Color, and Background Color. Below the toolbar is a large empty text area for entering comments.


Back Save and Exit **Save and Continue**

PRESS SAVE AND CONTINUE

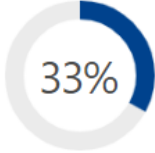


6. Competency ratings can be modified, and comments entered as needed for each Competency just as in the Manager Review step.

2023-2024 Annual Review - DEMO 1
Options ▾



Employee One
Account Technician I
6/1/2023 - 5/31/2024



- Overview
- Goal Rating
- Competencies
- Performance/Professi...
- Overall Performance R...
- Sign Off

Competencies

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Collaboration, Communication, and Dependability
▾

[Details](#)

Comments :

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7. Press Save and Continue to proceed to the next page.

Comments :

 **Employee One (Self)** Rated : 3 - Meets Expectations Review : 2022-2023 Annual Review DEMO Time : 3/15/2023 4:22 PM

B I U S x₂ x² I_x | [List Icons] | Font - Size - A+ A-

RBC | [Undo] [Redo] [Cut] [Copy] [Paste] [Table] [List]

PRESS SAVE AND CONTINUE ←

8. The Performance/Professional Development questions and comments can be updated if desired.

2023-2024 Annual Review - DEMO 1

Options

Employee One
Account Technician I
6/1/2023 - 5/31/2024

67%

Performance/Professional Development

What were two of your key accomplishments that you were most proud of this year? Why? (for example, this could include an outcome, improvement in skills, or improvement in customer service)

Comments:

Rich text editor toolbar and input area.

9. Press Save and Continue to proceed to the next page.

What assistance would be helpful from your team or your supervisor to support your success in the coming year?
(Optional)

Comments:

Rich text editor toolbar and input area.

Back Save and Exit Save and Continue

PRESS SAVE AND CONTINUE

10. The Overall Performance Rating can be updated if desired. Press Save and Continue when finished.

Rating Comments
When providing comments for a performance review, it's important to be **constructive**. Here are some guidelines for crafting your comments:

1. **Specificity:** Be specific about the employee's achievements and areas for improvement. Instead of general statements like "good job," provide concrete examples of what they did well.
2. **Balance:** Pair any criticisms with positive feedback. This can help motivate the employee to improve while also recognizing their strengths.
3. **Actionable:** Offer clear suggestions for how the employee can improve or continue to excel. This could include training opportunities, resources, or specific goals to work towards.
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Next Steps
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Step 4 - Review Acknowledgement - The Employee signs the Annual Review form.

Rate the employee on their overall performance.

Select

Please provide comments for your overall rating.

Comments: *

B I U S x₂ x₃ T_x | **¶** | **☰** | **☷** | **☹** | **☺** | **☻** | **☼** | **☽** | **☾** | **☿** | **♁** | **♂** | **♀** | **♋** | **♌** | **♍** | **♎** | **♏** | **♐** | **♑** | **♒** | **♓** | **☰** | **☷** | **☹** | **☺** | **☻** | **☼** | **☽** | **☾** | **☿** | **♁** | **♂** | **♀** | **♋** | **♌** | **♍** | **♎** | **♏** | **♐** | **♑** | **♒** | **♓** | **☰** | **☷** | **☹** | **☺** | **☻** | **☼** | **☽** | **☾** | **☿** | **♁** | **♂** | **♀** | **♋** | **♌** | **♍** | **♎** | **♏** | **♐** | **♑** | **♒** | **♓**

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Back Save and Exit **Save and Continue**

PRESS SAVE AND CONTINUE ←

11. The Summary page has now been updated with the any ratings changes that were made during the discussion step. Click Next.
12. The next page is the acknowledgement page. Enter your name into the Manager box and press Sign. Enter any comments that you would like added to the review.

2022-2023 Annual Review DEMO Options ▾

Employee One
Account Technician I
9/1/2022 - 8/31/2023

80%

Sign Off

The employee's signature on the evaluation form signifies that the employee and the supervisor have discussed the contents of the review. By signing, the employee is not indicating agreement with the review, only that the discussion was held. The employee may provide additional comments below, which will be retained as part of the evaluation.

Self
Pending Signature

Manager

ENTER NAME **PRESS SIGN**

Comment

B I U S T

Comment entered by Manager.

ENTER COMMENTS

13. Press Submit when finished. This will send the review to the employee to acknowledge. Notice that you have a Redo button beside your signature in case you need to type your name in again.

2022-2023 Annual Review DEMO

Options

Employee One
Account Technician I
9/1/2022 - 8/31/2023

80%

Sign Off

The employee's signature on the evaluation form signifies that the employee and the supervisor have discussed the contents of the review. By signing, the employee is not indicating agreement with the review, only that the discussion was held. The employee may provide additional comments below, which will be retained as part of the evaluation.

Self
Pending Signature

Manager
Manager One Date : 3/16/2023

Redo

Comment

Comment entered by Manager.

Back Save and Exit Submit

PRESS REDO TO RETYPE YOUR NAME IF NEEDED

PRESS SUBMIT

14. You will not be able to make changes after hitting the submit button. If you need a step re-opened, please email ihr-hrais@illinois.edu. Press Submit to send the review to the employee.

Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

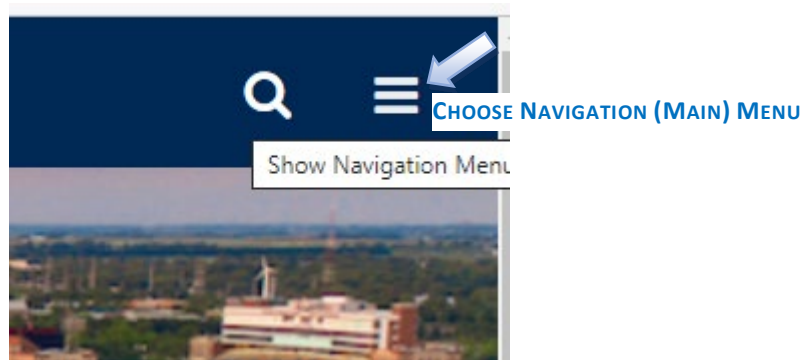
Cancel Submit

PRESS SUBMIT

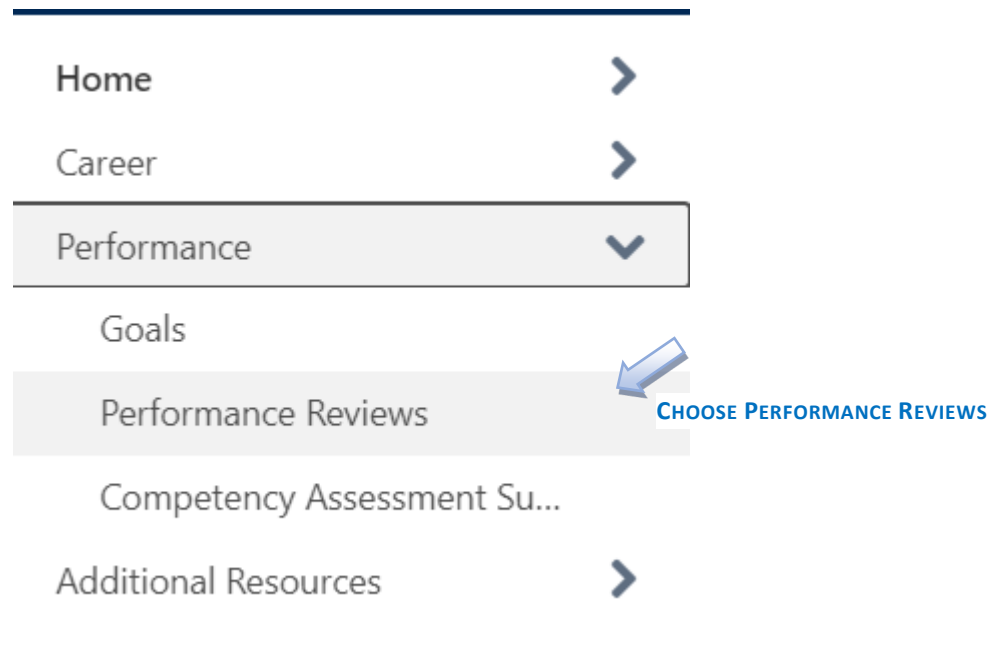
15. The employee will now receive an email that the Annual Review is ready for the Acknowledgement step. Once the employee has acknowledged their form, you and the employee will receive an email that the task is complete.

Access the Completed Annual Review:

1. To review the performance review at a later date, you can go to the Performance Reviews page.
 - a. From any page in Cornerstone, access the main menu in the upper right corner of the page and choose Performance, Performance Review
 - i. Select the menu:



- ii. Select Performance, Performance Reviews:



2. On the Performance Review Summary page, the My Assigned Reviews tab, select the Completed status to view completed performance reviews. Click on the Review you would like to view. This will download a PDF document which you can then save or print.

Performance Review Summary - Manager One

Launch Review


CHOOSE MY ASSIGNED REVIEWS

My Assigned Reviews My Personal Reviews

Title: Search

Status: **CHECK COMPLETED**

Not Started Completed Incomplete Expired

Title	Description
 AY2023-24 Annual Review of Employee One - DEMO 1	2023-2024 Annual Review - DEMO 1

SELECT REVIEW FORM

Last Modified: March 25, 2024