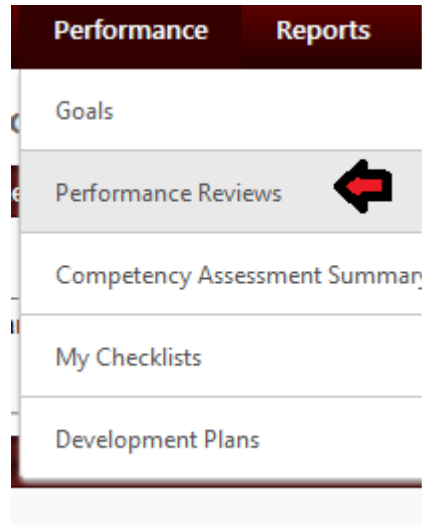


## Executive Level Self-Assessment (Performance Review):

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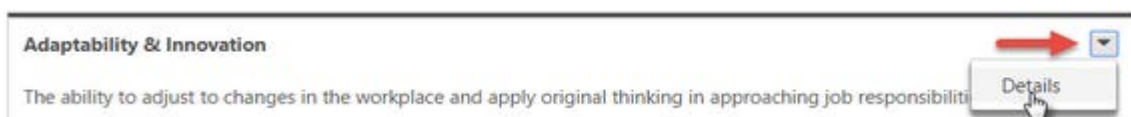
To access the Cornerstone system, login to your uLink account, navigate to the Human Resources block of your employee tab, and click on the Cornerstone link, which will automatically direct you into the system.

1. Hover over the Performance tab, and select **Performance Reviews** from the drop-down menu.



2. Once in your Performance Review Summary page, select the **My Personal Reviews** tab. From this screen, click the Annual Evaluation Form link under the Review column to initiate your review.
3. The review will open with the default first step: **Overview**. Scroll down to the bottom of the page, and click the **Get Started** button.
4. This will launch the Executive Goals page, where you should describe your accomplishments for the past evaluation period (fiscal year), and provide an overall rating. In the provided blank text field, document notable successes, accomplishments, and strategies of the past year. Ensure these are tied to the overall strategic mission of the University. Click **Save and Continue** to proceed to the next page.
5. The next page is the Executive Competencies page. Please rate yourself on each of the competency types, and utilize the Comments box to detail justification for each respective rating.

(Detailed descriptions for each competency type can be found by clicking the Down arrow at the top right of each block. )



6. There are 12 in total. All must be evaluated in order to proceed to the next step. Click **Save and Continue**.
7. The Goal Planning step allows for documentation of goals for the current evaluation period. Begin by clicking the “Add Goals” button. There are two methods for adding goals at this step:

- a. **Create a New Goal:**

Compose a new goal from the “Create Goals” page. Indicate a title, description, date range for completion, and Perspective type (Departmental, Assigned Goals, or Strategic initiatives). You can also attach supporting documentation to each respective goal. The system requires that you designate a weight for each goal. Enter a weight for your goal between 0 and 100. Weighting allows you to place a greater value on certain goals. For example, if you have four goals for a review period and they are valued equally, you should assign them each a weight of 25%. Similarly, if one goal is more important than the others, you may give that goal a weight of 40% and assign the other three a weight of 20%. The heavier weighted goal will count more towards your overall goal progress than the other 3.

Tasks and targets enable users to break down the different steps that are needed to accomplish the goal and to make the goal more clear to the user's performance manager. To add a task or target to the goal, click the Add Tasks or Targets button. See Goal - Create/Edit - Add Task or Target. Once tasks and targets are added to a goal, they are displayed in the Tasks and Targets section. The Weight field displays the weight that was entered when the task or target was created. However, you can continue to update the weight of each task and target until the goal is saved. The total weight of all tasks and targets is displayed in the upper-right corner of the Tasks and Targets section. When the goal is saved, the total weight must be equal to 100%.

The Visibility checkbox allows you to share your goal with other executives so that they can align their goals to yours if relevant

- b. **Align with an existing Goal:**

Aligning your goal with another goal indicates that your goal directly supports and contributes towards the success of an existing goal. These goals will be those of your supervisor already documented in the system. Goal alignment ensures that all employees in a team, division, or company are working to achieve similar goals, and allows employees to see how their efforts contribute to the overall success of the company by creating a hierarchy of goals.

To access, click the **Align** button, then select the radio button next to the relevant goal(s) you wish to align to your review.

Click the checkbox labeled (**Overwrite the following fields when aligning: Title, Description, Weight**) to copy over the existing goals and its attributes. If you do not select this box, you will have to indicate a description, title, weight, etc. Click “Align” Button to return to the Goal Planning page.

8. Click **Save** button once all goals and their respective attributes have been entered, then **Save and continue**.
9. The next page is the Development Planning step. Unlike goals, which are intended to accomplish strategic missions of the enterprise, development plans are meant to provide an opportunity for identifying objectives that can contribute to your own professional development and career goals. Examples include attaining certifications, developing particular technical skills, completing educational accomplishments, etc.
10. Click the Add Objective button, then title, and designate the Objective Category. Once added, click the down Arrow next to the objective, and select either a training or action step to support achievement of said objective.
  - a. The Training option, will link to existing Learning Objectives within the Cornerstone Training module.
  - b. Action Steps will link to competencies within the Performance module. After entering the step title, select the corresponding competency type from the **Activity Category** Drop-down menu, and an anticipated achievement date (Due Date).
11. Once completed, click submit, which then forwards your self-assessment to your supervisor for approval. Your Supervisor will review the goals you've entered, document their own ratings for each of your competencies, and review your goal and development plannings. This will then route to your 2<sup>nd</sup> level supervisor (if applicable), then back to your supervisor for Discussion with you.
12. After this discussion, your supervisor will sign off, which then route the evaluation back to your queue in Cornerstone for your signature.
13. Return to your Performance Review tab, click on **Complete Self Assessment** link.
14. Click **Get Started** Button. You'll go through each of the evaluation steps once more, reviewing notes from yourself and your evaluators. Click **Save and Continue** to proceed through each page.
15. The Summary page will display your overall rating. Click the Next button to proceed to the signatory page.
16. Click the Acknowledgement box **AND** click the **Sign** button. You may enter comments in the free text field below, followed by clicking the **Submit** button at the bottom right.

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

**Sign**

Sign

17. The system will prompt you to click submit once more, which will finalize your executive evaluation for this review period.