

# Self-Evaluation and Planning

## Step 1

# Click on Your Evaluation

Pathway:

Login to ULINK > Click on “Employee” tab  
> Click on “Cornerstone “ in Human  
Resources block



Access your review  
and  
“Get Started”

# Pages of the Review/Planning

Pages for 2019 Review

Pages for 2020 Planning

- Overview
- Goal Rating
- Core Competency Rati...
- Departmental Compet...
- Goal Planning
- Core Competency Plan...
- Departmental Compet...
- Development Planning
- Summary
- Position Description
- Signatures-Unclassified

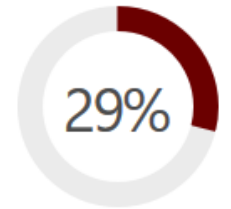
## 2019 Evaluation for Unclassified Staff

Options ▾



998191|Lab Specialty Analysis Tech  
1/1/2019 - 12/31/2019

Disregard!



### Overview

Your annual performance evaluation is an important tool to support your professional development as an employee of the University of Louisiana at Lafayette. This provides an opportunity to be recognized for your contributions and to collaborate with your supervisor in aligning your goals and performance with the mission and values of the University.

#### Review Step Progression

- Self Evaluation Due: 1/31/2020
- Evaluating Supervisor Review
- Second Level Evaluator Review
- Evaluating Supervisor Discussion and Sign Off
- Employee Acknowledgment

Indicates which step you are on

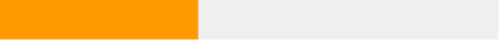
Click Here to Start

Get Started

# Goal Rating

## To Mark Progress on Goal:

Develop and launch Performance reviews for all full time employees of the university

Progress:  40%

Start Date: 1/1/2019

Due Date: 12/31/2019

more...

- Goals Page Comments
- Goals Page Attachments
- Manage Goals



Click on the drop-down arrow in the Goal area then click “Manage Goals”

# Manage Goals

Enter % Complete for Goal, or, Tasks and Targets if you have them

100% =  
Complete

## Tasks & Targets

	<b>Description:</b> Identify groups of employees and coordinate with the administration to determine review requirements for each group	<b>Start Date:</b> 1/1/2019	<b>Due Date:</b> 12/31/2019	<b>Weight:</b> 20%	<b>Progress:</b> <input type="text" value="100"/>
	<b>Description:</b> Develop review and training for Civil Service employees based on PES	<b>Start Date:</b> 1/1/2019	<b>Due Date:</b> 12/31/2019	<b>Weight:</b> 20%	<b>Progress:</b> <input type="text" value="100"/>

Show All (5)

Be sure to enter progress for all tasks

Done

# Manage Goals

## Manage Goals

60% **develop triage process**  
Due Date: 12/31/2019 Perspective: Departmental Goals Weight: 100%

Progress:

60

Description:

Start Date: 1/1/2019

### Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

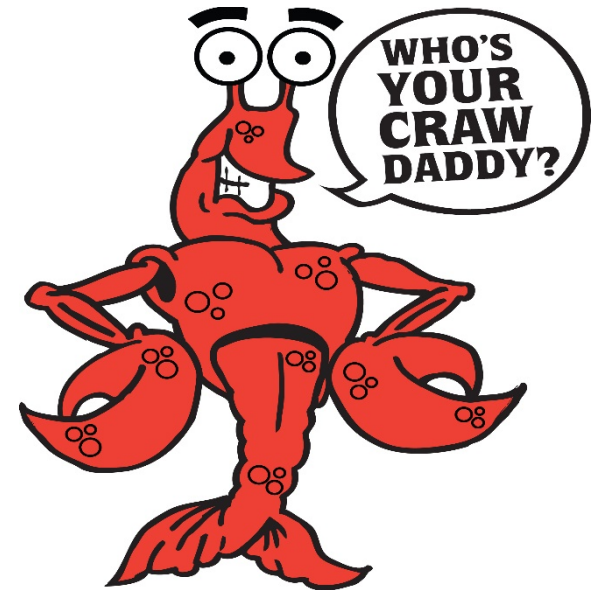
### Comments

Add Comment

Click here to  
continue

Comments can be  
added by clicking  
here

Done



# Goal Rating

Progress indicator for entire goal will change based on progress of Goal or Tasks



Develop and launch Performance reviews for all full time employees of the university

Progress:  100%

Start Date: 1/1/2019

Due Date: 12/31/2019

more...

# Goal Rating



Click on “?” to see Rating Scale Details

- Select
- ✓ Select
  - Not Evaluated
  - Not Met
  - Needs Improvement
  - Partially Met
  - Met
  - Exceeded

## Rating Scale

Rating	Description
<b>Not Evaluated</b>	
<b>Not Met</b>	No dimensions of the goal (i.e. on time, on budget, etc.) were achieved
<b>Needs Improvement</b>	Most dimensions of the goal (i.e. on time, on budget, etc.) were not achieved.
<b>Partially Met</b>	One or more dimensions of the goal (i.e. on time, on budget, etc.) were not achieved.
<b>Met</b>	Goal was fully achieved (i.e. on time, on budget).
<b>Exceeded</b>	Goal was achieved ahead of schedule and/or under budget



# Goal Rating

The screenshot shows a web interface for goal rating. On the left, a dropdown menu is open, showing options: Select (checked), Not Evaluated, Not Met, Needs Improvement, Partially Met, Met, and Exceeded. A green arrow points from this menu to a central orange box. The orange box contains the text: "Select Rating and Enter Comments. Comments/Documentation Required for Rating of 'Not Met' or 'Exceeded'". To the right of the orange box, another green arrow points to a menu with the title "Options" and items: Attachments, Complete Offline, Upload Review, and Print Review. A green callout box points to the "Options" menu with the text: "Options menu on upper right of page". Below the orange box, a green arrow points to a button labeled "Save and Continue". A light green arrow points from the "Save and Continue" button to the text: "Click to Move to Next Page".

Select Rating and Enter Comments  
Comments/Documentation  
Required for Rating of "Not Met" or "Exceeded"

Documentation can also be added as an attachment

Options menu on upper right of page

Click to Move to Next Page

Save and Continue


Employees hired on or after October 1, 2019 have not worked for the University long enough to be appropriately rated. These employees can provide the rating “Not Evaluated” for Goals and Competencies

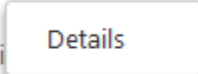




New to the University


# Core Competency Rating

Basic abilities required to successfully perform role

**Adaptability & Innovation** 

The ability to adjust to changes in the workplace and apply original thinking in approaching job responsibilities 

  \*

**Comments:** 

Click on the drop-down arrow, then, "Details" to see Work Examples for this Competency

Click on this icon to see Performance Benchmarks for this Competency

Benchmarks can be "pulled-in" to populate in the Competency Comment area. See how on next slide

Which Statement Best Describes Your Performance for this Competency?

Click on “+” for statements to populate in Competency Comment area

+	Always pursues continuous learning to adapt to job changes	Advanced
+	Seeks and integrates constructive criticism	Advanced
+	Always pursues and applies learning/training to improve performance	Advanced
+	Finds new ways to perform various tasks, resulting in increased personal and organizational performance	Advanced
+	Eagerly and proactively seeks to accept, adopt and integrate new ideas into his/her work	Advanced
+	Somewhat flexible when encountering change, but more flexibility is needed	Developing
+	Can only handle a couple of tasks simultaneously	Developing
+	Performance suffers when under a moderate level of stress and pressure	Developing
+	Sometimes pursues continuous learning to adapt to job changes	Developing
+	Accepts but does not integrate constructive criticism	Developing
+	Occasionally pursues and applies learning/training to improve performance	Developing
+	Occasionally looks for ways to perform a task better or more efficiently	Developing
+	Reluctant to accept new ideas or new ways of doing things	Developing
+	Maintains the same approach, even when the circumstances call for a change in approach	Does Not Demonstrate
+	Can only handle one task at a time	Does Not Demonstrate



Scroll for more options

# Core Competency Rating

Select



Click on the “?” for Rating Scale Details

- ✓ Select
- Not Evaluated
- Does Not Demonstrate
- Developing
- Proficient
- Advanced
- Expert

Provide justification, or notes, regarding your rating in the Comment box. Documentation Must be provided for ratings of “*Does Not Demonstrate*” or “*Expert*”

# Core Competency Rating

Rate Yourself on Each  
Competency then Click

Save and Continue

To Move to Next Page



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# Departmental Competency Rating

- This section is currently populated for Human Resources and Athletics Personnel Only

Those who do not work in HR or Athletics should click

Save and Continue



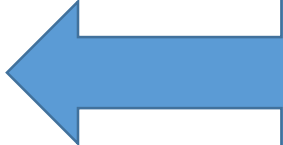
# Departmental Competency Rating

*For Employees in HR or Athletics:*

Departmental Competencies

Select Competencies

Rate your Performance on the  
Selected Departmental Competencies  
The Comment box can be used to  
explain your Rating



Click and select the  
Competencies that are  
appropriate for your  
Position



Click "Save and Continue"



You've completed the 2019 Rating portion of the Review



The next Pages allow you to Plan for 2020

# Goal Planning

## 2019 Evaluation for Unclassified Staff



998191|Lab Specialty Analysis Tech  
1/1/2019 - 12/31/2019

Options ▾

- Attachments
- Complete Offline
- Upload Review
- Print Review

Documentation can be attached

## Goal Planning

Add Goals

Click to Add Goals

Enter goals for the 2020 calendar year.

Back

Save and Exit

Save and Continue



Title \*

Create and Launch Performance Planning for Unclassified Employees

What should my position accomplish this year?

Description

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

Consider requirements for both those who supervise and those who don't to build a task in CSOD that would allow for Planning for the 2019 year.

Examine requirements to roll-out task

Example

Start Date

1/1/2019 [Calendar Icon]

Due Date \*

12/31/2019 [Calendar Icon]

Weight \*

60

Does the accomplishment of this goal mean more (or less) than others to the Department?

Perspective \*

Assigned Goals

Where does this goal come from?

Tasks and Targets

Add Tasks or Targets

What must I do to accomplish this goal?



# Add Tasks or Targets

## Add Tasks or Targets

### Description

Build review in Cornerstone; one for Supervisors, one for non-supervisors

### Start Date \*

1/1/2019

### Due Date \*

12/31/2019

### Weight \*

50

%

Include Target

### Type

Currency

### Start Value

Start Value

### Target

Target

For the progress of this target, include results from employees aligning with this goal and inheriting this target.

## Add Tasks or Targets

### Description

Develop, schedule, and conduct training for navigation. Provide instructions for ongoing support.

### Start Date \*

1/1/2019

### Due Date \*

12/31/2019

### Weight \*

50

%

Include Target

### Type

Currency

### Start Value

Start Value

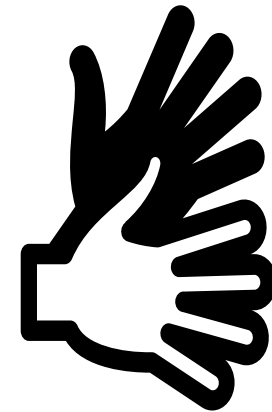
### Target

Target

For the progress of this target, include results from employees aligning with this goal and inheriting this target.

# Goal Planning

When you have added  
all Goals for 2020,  
Click “Save and  
Continue”

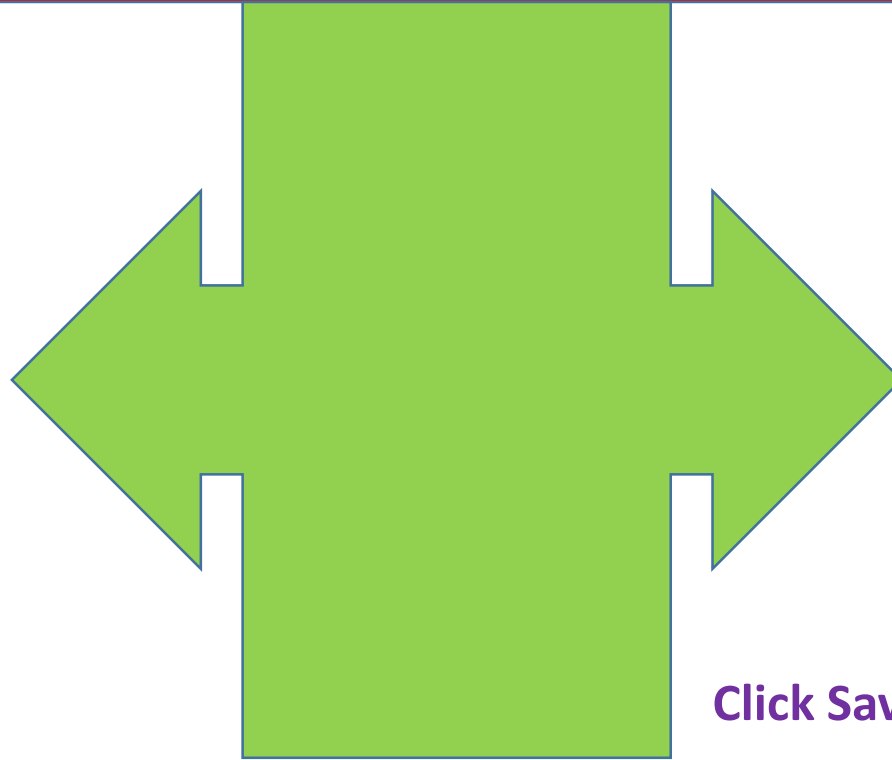


# Core Competency Planning

This area will be primarily used by Supervisors to enter expectations for Competencies. Employees can use the comment area to enter changes they wish to make this year that will affect the Competency rating next year.

# Departmental Competency Planning

Currently only  
for employees  
in HR and  
Athletics



Those in HR or Athletics  
can select the  
Competencies they feel  
are relevant to their  
position and enter  
comments in the  
comment box

**Click Save and Continue to Move to Next Page**

# Development Plans

Objectives that can contribute to your career goals as well as work and behavior performance



What do I need to do to be who I Want to be?

- Obtain a certification
  - Develop specific skills
  - Pursue education
  - Correct a persistent issue
  - Participate on committee
  - Enroll in training
- The list goes on and on...

[Click here to Start](#)

Development Planning

Add Objective

Back

Save and Exit

Save and Continue

Submit



# Add/Edit Objective

## Add/Edit Objective

Objective Title \*

Obtain SHRM certification

Objective Category

Select Objective Category

- ✓ Select Objective Category
- Behavior Development Objective
- Educational Development Objective
- Knowledge Development Objective
- Performance Development Objective
- Personal Development Objective
- Skill development objective
- Technical Development Objective

Cancel

Save

Back

Save and Exit

Select the best fit

Enter what you  
would like to get or  
achieve

# Development Planning

Obtain SHRM certification - (Knowledge Development Objective)

Add Training or Action Steps from the drop down.

Back Save and Exit Save a

- Edit Objective
- Delete Objective
- Add Training
- Add Action Step

1 2

## Add/Edit Action Step

### Action Step Title \*

Participate in certification prep course through ASHRM

### Activity Category

External Training

Select Activity Category

Adaptability and Innovation

Analysis, Problem Solving, and Decision Making

Builds Relationships and Fosters Collaboration

Builds Talent

Business, Planning, Organizing and Scheduling, Strategy and Execution

Communicates Openly and Listens

Demonstrates Emotional Acuity

Ensures Alignment

Ensures Execution

Establishes Trust

✓ External Training

Save

Exit

Choose the best fit

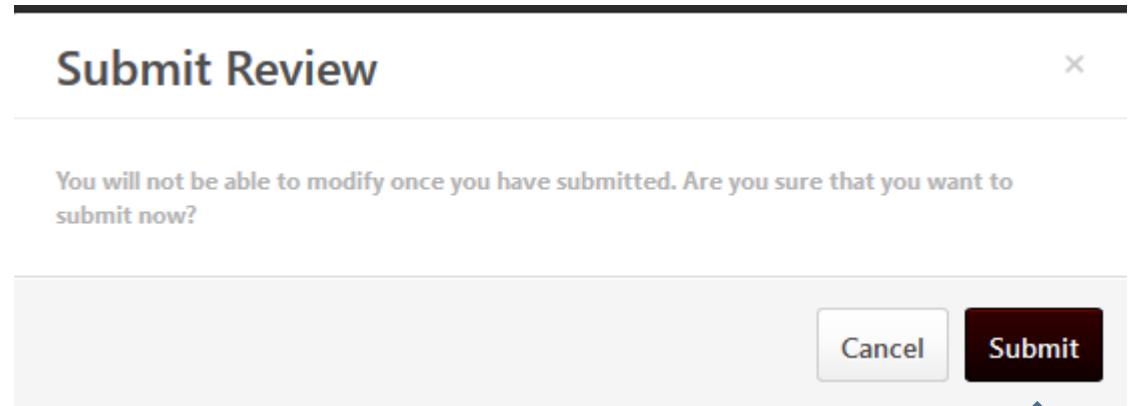
Align Action Steps with a Competency

# Submit the Review

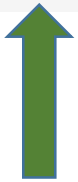
The review will move to your supervisor's queue



Click Here



And Here Too!



# Step 1 Complete

