

Fiscal Year 22/23 Planning Task

Step 2: Supervisor Review/Discussion/Sign-Off



This Task involves
Planning for things
that should be
accomplished from
July 1, 2022
through June 30,
2023



Find the task for the Employee you will review in the *Pending Performance Tasks* block of your Cornerstone Welcome Page.

Pending Performance Tasks

22/23 Planning or Rating of Employee Name



Goals

- 

Suggested Process for Supervisors

Copy Employee's Entries to your box and strike through, or add to, Employee's comments

1. Develop a process to triage incoming requests, assign them to the appropriate person, then follow up to make sure request is fulfilled.

Less

Example:

1. Develop a process to triage incoming requests, assign them to the appropriate person, then follow up to make sure request is fulfilled. **This process should be completed by the system analyst position**
2. Increase the use of the online catalog by 50%.
 - Establish a committee to come up with possible solutions
 - Supervisor will select solution, then committee will implement solution
 - Run usage report each month, pivot and reconvene committee if we are not getting moving in the right direction
3. Develop a training plan and cadence to provide compliance training for those with no computer access (facilities, housing, NIRC) proctor on-site training a minimum of 2 times at each facility before 6/15/23

The Supervisor should for edit, modify, or enter goals that are appropriate for the position.

Competencies

Core Competencies are the knowledge, skills, abilities, and behaviors that contribute to Performance. Core competencies apply to **every** employee.

For each competency review comments entered by the employee.

Integrity and Professional Conduct:

- Maintains professional composure and attitude.
- Ability to be a consistent, honest, and trustworthy steward of State resources.
- Adheres to University and departmental policies including but not limited to code of ethics, attendance, punctuality and dress code.
- Completes required training in time frame directed by supervisor or administration (this bullet will be rated separately in the rating task).

Comments:

J (Self)

5/11/2022 11:28 AM

- Make a conscious effort to respond rather than react to issues
- Consider several options prior to requesting purchases
- Complete training when assigned

Enter expectations for the fiscal year for each competency. Document those actions you would like the employee to stop, start, or sustain.

Example:

Integrity and Professional Conduct:

- Maintains professional composure and attitude.
- Ability to be a consistent, honest, and trustworthy steward of State resources.
- Adheres to University and departmental policies including but not limited to code of ethics, attendance, punctuality and dress code.
- Completes required training in time frame directed by supervisor or administration (this bullet will be rated separately in the rating task).

Comments:

J (Self)

5/11/2022 11:28 AM

- Make a conscious effort to respond rather than react to issues
- Consider several options prior to requesting purchases

More



Expectation:

- Continue demonstrating professional attitude
- Review Purchase requests with Supervisor
- Arrive prepared to work at 7:30 on workdays
- Complete 2023 required compliance training by 4/30/23

Characters: 0

Don't use evaluation statements like "you are trustworthy and honest"

Additional Required Competencies

Skills, Abilities, or Behaviors required for this position that are not included in the Core Competencies.



Regardless if you add one competency or several, Competencies added in this section will account for 20% of the Overall Rating

Competencies can be added from our Competency bank:

Additional Required Competencies

Additional Required Competencies ×

☐ Select All

Add Competency

Select Competencies

Click Here

Then Here

Enter the competency then Search.

The example below is to add the "*Customer Service*" competency to the employee's planning task:

Tell me more

Search Competencies

Search

Selected (1)

customer service

Search

Refine Search

<input type="checkbox"/>	Name	ID
<input checked="" type="checkbox"/>	Customer Service	

Cancel

Add Selected

Customer Service

Meets the expectations and requirements of internal and external customers; establishes and maintains effective relationships with customers.

Comments :

B

I

U

S

x₂

x²

I_x

¶

¶

¶

¶

¶

¶

¶

¶

Font

Size

A

A

ABC

↶

↷

✂

📄

📋

📌

📁

📧

🔄

The selected competency(ies) will be added to the Planning.
Supervisor should enter expectations for Competencies added to the task.

Supervisors can also “write in” competencies and expectations:

Add any other competencies that are relevant to this position

Comments:



The employee will be rated on his/her Performance on the Core Competencies and added competencies at the end of the fiscal year.

Professional Development

Review entries made by employee (if any) then provide guidance or suggestions. Entries can be made to this area when you discuss the Planning with the employee. Enter suggestions for training, conferences, books to read, workshops to attend...

Provide
guidance,
make
helpful
suggestions
and follow
through

Indicate specific training and professional activities to be completed in the next rating period that will contribute to development within your current role and/or facilitate future professional growth.

Comments:

d (Self)

Time : 5/11/2022 11:29 AM

I would like to pursue the SPHR Professional Certification as it will help me to grow in my current role. There are several courses on LinkedIn that I plan to take and, if possible, I would like to attend the SHRM annual conference.



Pursuing this certificate will serve you well in your Professional endeavors. The local SHRM chapter offers workshops. I will provide you with a contact. I am not sure the budget will support a SHRM conference, however, we will try to get you to a CSOD Learning Product Academy this fiscal year

Position Description



999868|Manager, Business Services
1/1/2020 - 12/31/2020

Select Options then
Employee Details to
see the Position
Description on file
with HR

Options ▼

- Add Co-Planners
- Attachments
- Employee Details
- Complete Offline
- Upload Review
- Print Review
- Print Reviewee Version

Position Description

Enter changes to
the Position
Description in
the Comment
box

*submit changes to HR Business
Partner for approval

- Job Summary
- Required Education and Experience
- Required Knowledge Skills and Abilities
- Essential Functions

Arrange a meeting with the employee to discuss the Planning. Review expectations for competencies as well as goals for the fiscal year. Go over Professional Development issues and the Position description with the Employee.



When all is clearly understood by both parties, advise the employee that the task will move to his/her queue for acknowledgement.

By your electronic signature you acknowledge that you have discussed the competencies with this employee and he/she understands the expectations for the review period.

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

Second Level Evaluator

Manual Signature on the printable version

Sign

Check Box
Click "Sign"
Then Submit

Comment

B *I* U ~~S~~ *I*_x ABC

Back

Save and Exit

Submit

Once
Submitted, the
task will move
back to the
Employee's
queue in
Cornerstone

