University of Utah Performance Management System
UUPM
Supervisor User Guide
Updated January 2020
For questions regarding UUPM, please contact your HR Associate Director.

http://services.hr.utah.edu/contact/search/

Or

801-581-2169
ACCESSING UUPM

To access UUPM, log in to CIS using your uNID and password.

Type “team performance” in the search bar. Click on the Team Performance tile.

Note: To save the Team Performance tile as a favorite for future use, click on the star.

Click on the Team Performance tile on the Manager Self Service screen.
CREATING PERFORMANCE PLANS

Creating a new plan

Performance plans can be initiated by a manager or by the employee. If your employee has already created their performance plan, please skip to the next section.

From the Team Performance screen, click on Create Documents in the upper right-hand corner of the window.

The Select Employee(s) window will appear. Click the checkbox next to the employee you are creating a plan for and click continue. You may select multiple employees to create performance plans simultaneously.

Define the performance plan period begin date and end date. Performance plan review periods are established by departments.

The document type should be Performance Document. From the Template drop-down, select the template for your department.
Click the green Create button in the upper right-hand corner of the window.
COMPLETING A PERFORMANCE PLAN

Define criteria

Both the employee and the manager can enter the employee’s goals on the Employee Goals tab by clicking the Add Goal option. Follow the instructions below to add goals to and approve an employee’s Performance Plan.

Note: If the employee has already entered their goals for the defined performance review period, you will receive an email notification for approval. You can add, edit, and remove goals as necessary.

From the Team Performance Screen, select an employee.

You will see the University Goals tab and may see the Coll/Div/Dept Goals tab. Review the goals under these tabs. No action in these areas is required at this time.

Select the Employee Goals tab to review any existing goals. To add a goal for the employee, click Add Goal.

Section 3 - Employee Goals

Employee Goals will be evaluated by: Employee, Manager

Add Goal
COMPLETING A PERFORMANCE PLAN

Define criteria, continued

Create a summarized title for the goal, provide a description, enter a due date (optional), and click Add.

Add Your Own Goal

Existing goals can be edited by selecting the pencil icon, or deleted by selecting the trash can icon.

Save progress often by clicking Save in the upper right-hand corner of the window.

To complete the Define Criteria step, click Approve.

Performance Document

Define Criteria

On the next screen, click Confirm.

Approve Performance Criteria

Select confirm to approve and complete the Define Criteria Step.
EVALUATION IN PROGRESS

Review Manager Evaluation

You will now see two additional tabs – Successes, Strengths and Overall Summary.

During the evaluation period, you and your employee will have periodic performance discussions. You are able to record the employee’s progress towards achieving their goals and other areas they are being evaluated on. You will enter your comments in the Manager Comment box under each available tab.

Note: Goals cannot be changed at this step in the process.

Expand the employee’s goals and enter any additional comments regarding the employee’s progress and performance in the Manager Comment box.

Date each comment to differentiate the various comments you add during the evaluation period.

You can complete this process for each goal within all tabs, excluding the University Goals tab.
EVALUATION IN PROGRESS
Review Manager Evaluation, continued

Click Save in the top right-hand corner of the window.

Note: Do not click Share with Employee until you have added all comments and rated each section of the employee’s performance for the entire evaluation period.

Save progress often.

REVIEW EMPLOYEE SELF-EVALUATION

Before meeting with the employee to finalize the evaluation, the employee should rate their performance and add comments in each area of the evaluation. Once the employee has submitted their self-evaluation, you will receive a system generated email prompting you to begin the manager evaluation.
PERFORM MANAGER EVALUATION AND RATINGS

Finalize performance review

Prior to meeting with the employee to finalize and complete the performance evaluation, you will add the manager ratings and comments to each section of the evaluation. Expand the goals, review employee comments, and select a rating from the drop-down menu. Provide comments to support your rating. Complete this step for all available tabs.

Documents can be attached to each section of the evaluation. Locate the appropriate tab, scroll down, and click Add Attachment. Add a document description, select the appropriate attachment audience.

Once you have uploaded all necessary attachments, click Save.

When you have completed the manager evaluation, click Save and then Complete in the upper right-hand corner of the window.

You may choose to share your ratings and comments with the employee prior to meeting in person to discuss their performance evaluation. To do so click Share with Employee and then Confirm.
MEETING WITH EMPLOYEE

Meet with the employee in-person to discuss the performance evaluation.

After the in-person meeting has been completed, if there are any final changes or comments you need to make to the evaluation, you must reopen the evaluation by clicking Reopen.

Next click Confirm. This will reopen the document in the Evaluation in Progress status.

Once all changes are complete, repeat the process of sharing the evaluation with the employee.

Finally, the employee must login to CIS to acknowledge the document. The employee should select Review Manager Evaluation and then click Acknowledge in the upper right-hand corner of the window.

The UUPM Website may be found here:
https://www.hr.utah.edu/serviceTeams/perfManagement.php