

# **University of Utah Performance Management System**

## **UUPM**

### **Supervisor User Guide**

Updated January 2020

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For questions regarding UUPM, please contact your HR Associate Director.

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

Or

801-581-2169

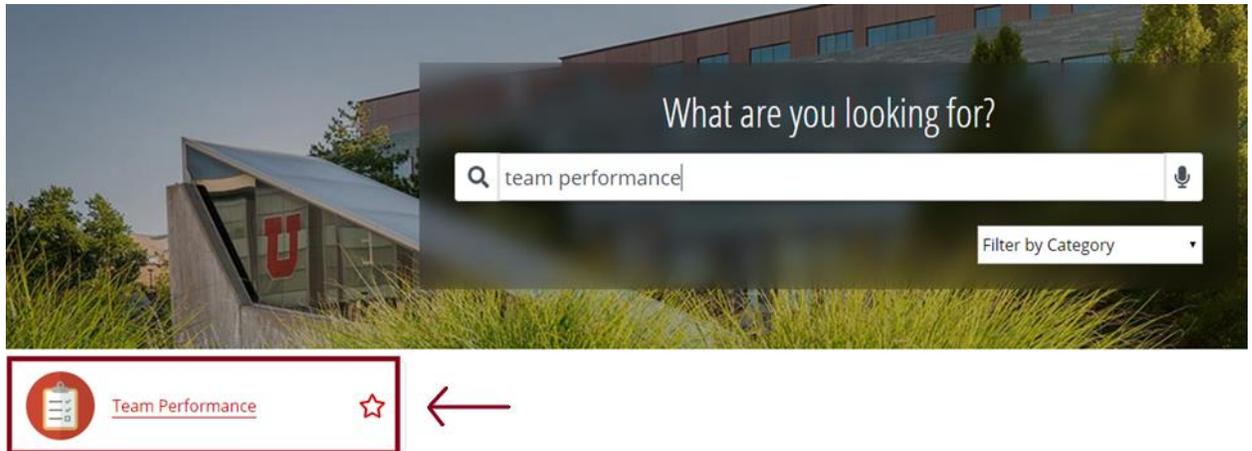
## ACCESSING UUPM

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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.

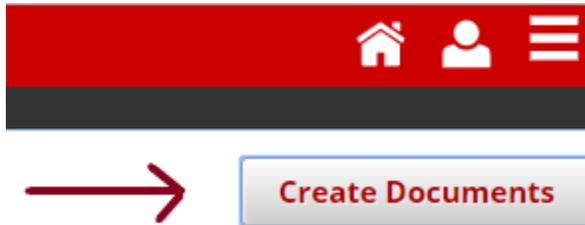


## CREATING PERFORMANCE PLANS

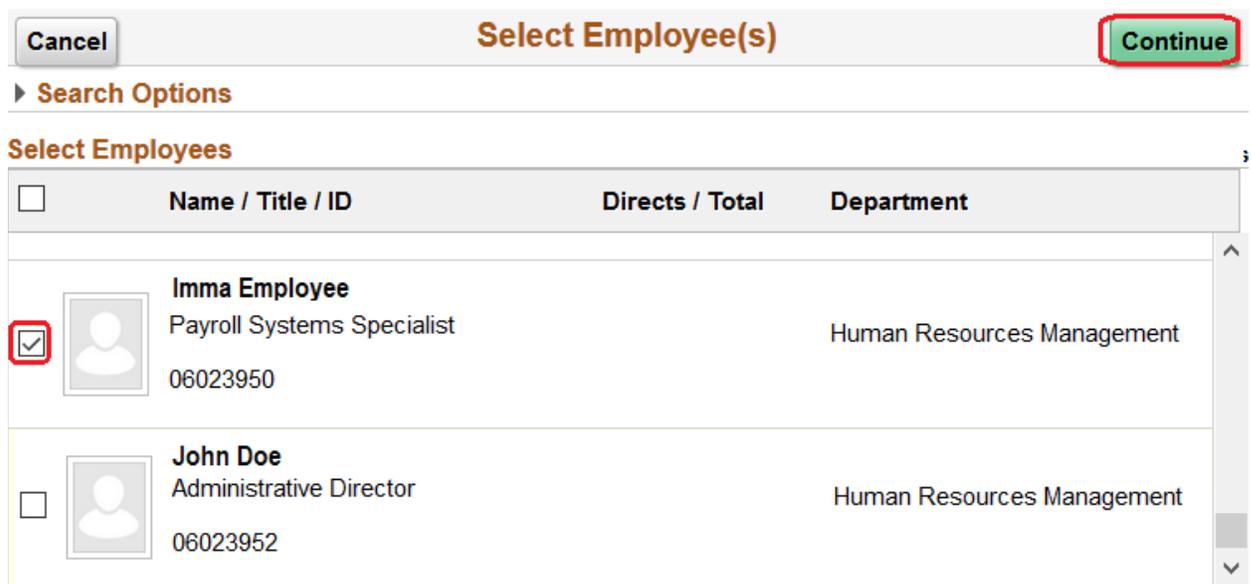
### *Creating a new plan*

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.

A screenshot of a 'Select Employee(s)' window. At the top, there are 'Cancel' and 'Continue' buttons. Below them is a 'Search Options' section. The main area is a table titled 'Select Employees' with columns for 'Name / Title / ID', 'Directs / Total', and 'Department'. Two employees are listed: Imma Employee (Payroll Systems Specialist, ID 06023950) and John Doe (Administrative Director, ID 06023952). The checkbox for Imma Employee is checked.

	Name / Title / ID	Directs / Total	Department
<input checked="" type="checkbox"/>	 <b>Imma Employee</b> Payroll Systems Specialist 06023950		Human Resources Management
<input type="checkbox"/>	 <b>John Doe</b> Administrative Director 06023952		Human Resources Management

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.

## CREATING PERFORMANCE PLANS

*Creating a new plan, continued*

Click the green Create button in the upper right-hand corner of the window.

Back **Create Documents**  Create

**Period Begin Date**  

**Period End Date**  

**Document Type**  ▼

**Clone from Prior Document**  **No**

**Template**  ▼

## COMPLETING A PERFORMANCE PLAN

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### *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

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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

The form contains the following fields and controls:

- Title:** Professional Development
- Description:** Attend a professional development workshop
- Due Date:** (example 12/31/2000)
- Action:** Add

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

Goal 1: Professional Development

Description:  
• Due Date:

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

Save Approve

Define Criteria

Print | Notify | Export

On the next screen, click Confirm.

## Approve Performance Criteria

Select confirm to approve and complete the Define Criteria Step.

Confirm Cancel

# EVALUTION 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.

### ▼ Section 3 - Employee Goals

◂ Expand | ▸ Collapse

#### ▼ Goal 1: Professional Development

Description : Attend a workshop

• Due Date :

Manager Rating

Manager Comments

A rich text editor interface with a toolbar containing icons for undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, link, and unlink. Below the toolbar is a large empty text area for entering comments.

Employee Rating Meets Expectations

Employee Comments

Attended the Meowvelous World of HR workshop for HR professionals that love cats

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.

## EVALUTION IN PROGRESS

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*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

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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.

**Attachments**

File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By
Doc1.docx	<input type="text"/>	<input type="text" value="Employee and Manager"/>	12/03/2019 4:36:54PM	SARAH WILSON

+ Add Attachment

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.

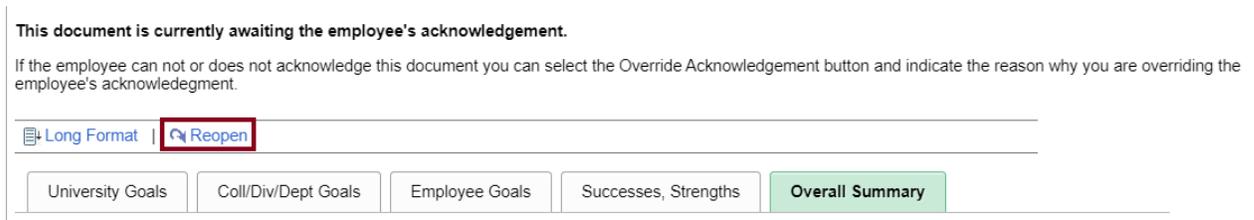
The screenshot shows the 'Performance Process' header with navigation icons (home, star, user, menu) and the text 'CIS Portal - PLPROD'. Below the header are two buttons: 'Save' and 'Share with Employee'. The 'Share with Employee' button is highlighted with a red box. Below the buttons is a dialog box titled 'Share with Employee'. The dialog box contains the following text: 'Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.', 'The overall rating you have assigned to this employee is **Meets Expectations.**', and 'Upon selecting confirm your electronic signature will be added to this document.' At the bottom of the dialog box are two buttons: 'Confirm' and 'Cancel'. The 'Confirm' button is highlighted with a red box.

## MEETING WITH EMPLOYEE

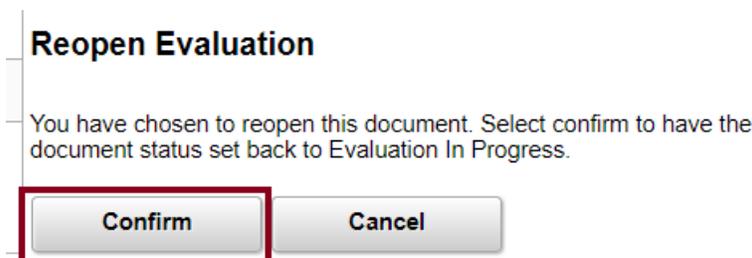
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Meet with the employee in-person to discuss the performance evaluation.

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>