

**University of Utah Performance
Management System
UUPM**

Employee 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

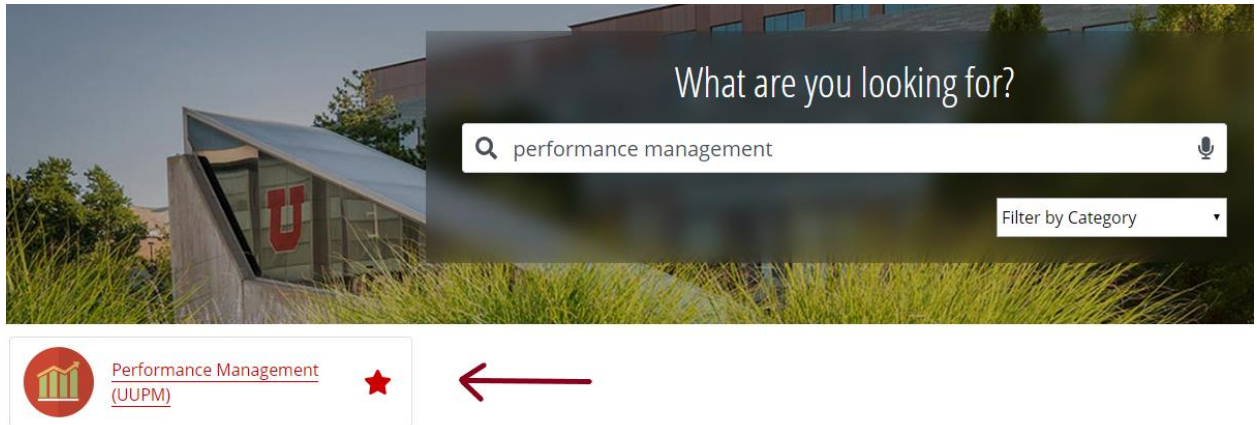
801-581-2169

ACCESSING UUPM

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

Type “performance management” in the search bar. Click on the Performance Management (UUPM) tile.

Note: To save the Performance Management (UUPM) tile as a favorite for future use, click on the star.



Click the red Start button on the left hand-side of the screen under New Performance Management System.

EFFECTIVE JANUARY 1, 2019

**The University has switched
to a new Performance Management system.**

New Performance Management System

Use For:

- Performance documents effective **after** December 31st, 2018
- For ALL campus departments, including U of U Health Academics

START



Legacy Performance Management System

Use For:

- Performance documents effective **before** January 1st, 2019
- For U of U Health Academics, **go to Pulse Performance Management**

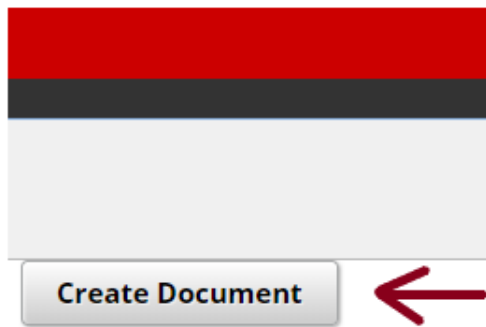
START

CREATING PERFORMANCE PLANS

Creating a new plan

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

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



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.

A screenshot of a web form titled 'Create Documents'. The form has a header bar with a 'Back' button on the left, the title 'Create Documents' in the center, and a 'Create' button on the right with a red arrow pointing to it. The form contains several fields: 'Period Begin Date' with the value '07/01/2019' and a calendar icon; 'Period End Date' with the value '06/30/2020' and a calendar icon; 'Document Type' with a dropdown menu showing 'Performance Document'; 'Clone from Prior Document' with a radio button and the text 'No'; and 'Template' with a dropdown menu showing '00939 UHRM Annual Performan'.

| | | |
|---------------------------|-----------------------------|--------|
| Back | Create Documents | Create |
| Period Begin Date | 07/01/2019 | |
| Period End Date | 06/30/2020 | |
| Document Type | Performance Document | |
| Clone from Prior Document | <input type="radio"/> No | |
| Template | 00939 UHRM Annual Performan | |

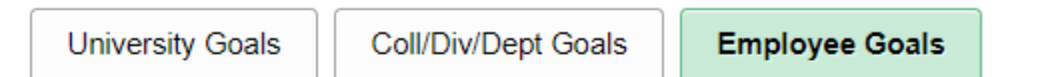
ESTABLISH PERSONAL GOALS

Define criteria

To establish personal goals which you will be evaluated on, click on the Employee Goals tab.

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

On the Employee Goals tab, click Add Goal



▼ Section 3 - Employee Goals

Employee Goals will be evaluated by: Employee, Manager

 Add Goal


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

Add Your Own Goal

*Title Professional Development

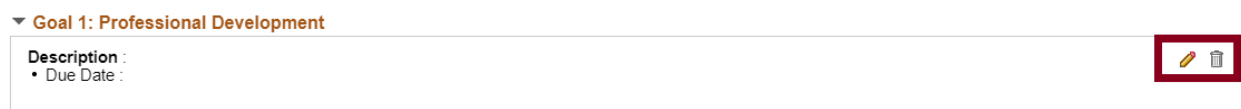
Description

Attend a professional development workshop

Due Date  (example 12/31/2000)

Add

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



ESTABLISH PERSONAL GOALS

Define criteria, continued

To create more goals, repeat the Add Goal process.

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

When all goals are created, click Save. Then select Notify. This will send an email to your manager prompting them to review and approve your goals.



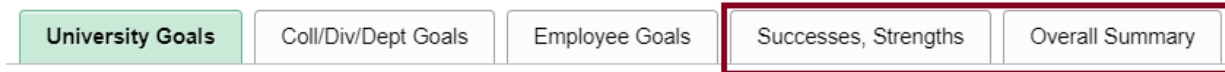
When the manager receives the email that your goals have been created, the manager will log into CIS to review and/or edit your goals.

Once the goals are reviewed, your manager will approve them.

After the Employee Goals section has been approved by your manager, the Define Criteria step is complete.

EVALUTION IN PROGRESS

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



During the evaluation period, you and your manager will have periodic performance discussions. You are able to record your progress towards achieving your goals and other areas you are being evaluated on. You will enter your comments in the Employee Comments box under each available tab.

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

Expand your goals and enter any additional comments regarding your performance in the Employee Comments box.

▼ Goal 7: Professional Development

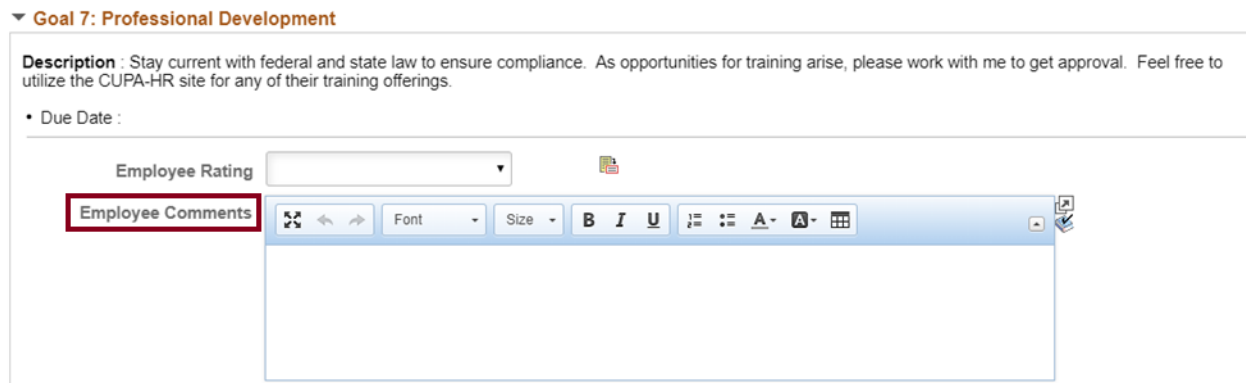
Description : Stay current with federal and state law to ensure compliance. As opportunities for training arise, please work with me to get approval. Feel free to utilize the CUPA-HR site for any of their training offerings.

- Due Date :

Employee Rating

Employee Comments

Font Size B I U



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.

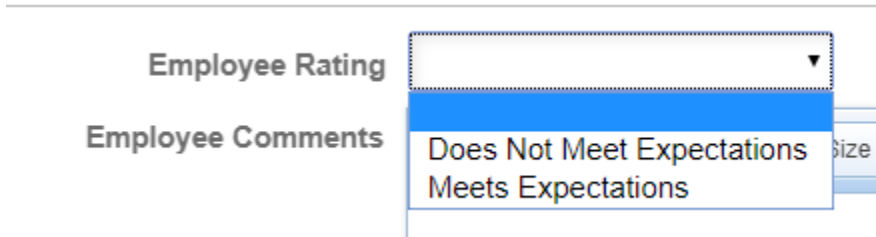
Click Save in the top right-hand corner of the window.

Note: Do **not** click Complete until your self-evaluation is finalized at the end of the evaluation period.

Save progress often.

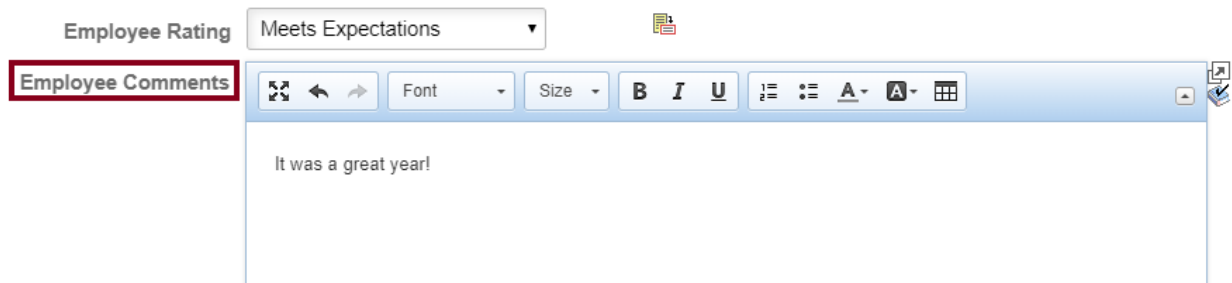
COMPLETE SELF-EVALUATION

To complete your self-evaluation, click each tab, excluding University Goals, and rate your performance on each goal by making a selection from the drop down menu.



A screenshot of a web form. On the left, there are two labels: "Employee Rating" and "Employee Comments". To the right of "Employee Rating" is a dropdown menu. The dropdown menu is open, showing two options: "Does Not Meet Expectations" and "Meets Expectations". The "Meets Expectations" option is highlighted in blue. To the right of "Employee Comments" is a text input box, partially visible, with the word "Size" next to it.

Next finalize your comments for each goal in the Employee Comments box.



A screenshot of a web form. At the top, there is a label "Employee Rating" followed by a dropdown menu showing "Meets Expectations". Below this is a label "Employee Comments" which is highlighted with a red box. To the right of "Employee Comments" is a rich text editor. The editor has a toolbar with icons for undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, link, and unlink. The text area of the editor contains the text "It was a great year!".

Repeat this process for each goal within each tab.

When finished, click Save in the top right-hand corner of the window. Then click Complete.



A screenshot of two buttons. The first button is labeled "Save" and has a red arrow pointing to it from the left. The second button is labeled "Complete" and is highlighted with a red box.

 Print |  Notify

COMPLETE SELF-EVALUATION

Continued

Next, click Confirm.

Complete Evaluation

You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.



Finally, click Notify. This will send an email to your manager that your self-evaluation is complete.



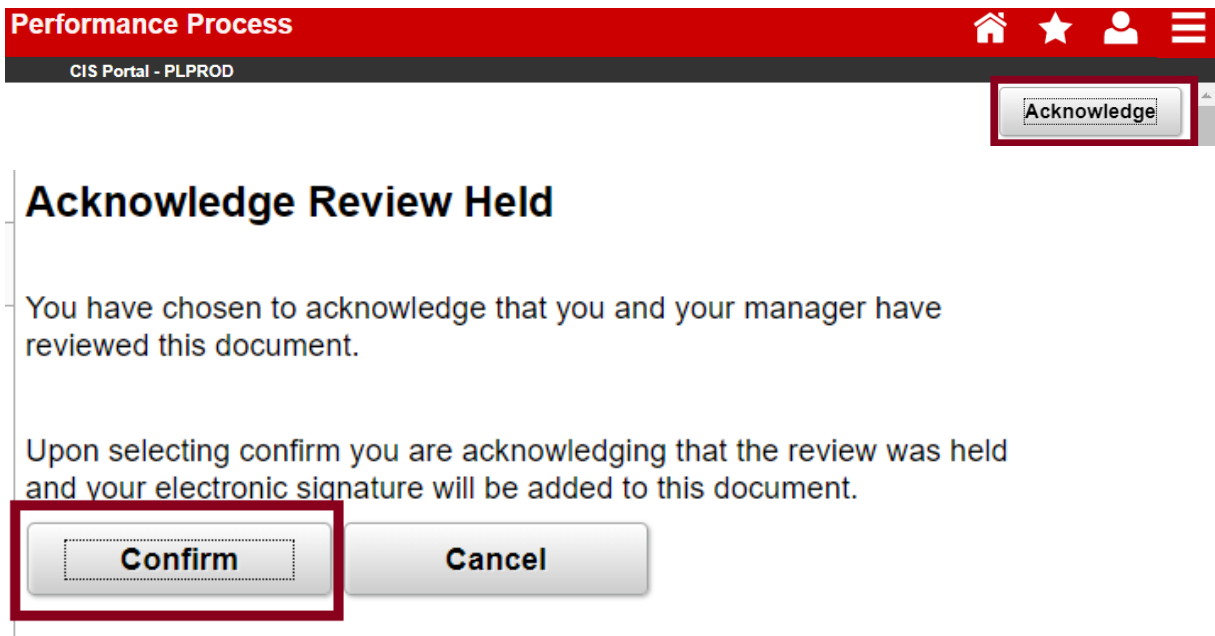
MANAGER EVALUATION AND IN-PERSON REVIEW

After you have submitted your self-evaluation, your manager will complete their evaluation. Managers can add attachments during this process. If you have any relevant attachments you would like included in your evaluation, provide those documents to your manager.

You and your manager will meet in person to discuss your performance for the evaluation period.

The final step is to acknowledge that you discussed the evaluation with your manager.

When ready, select Review Manager Evaluation and then click Acknowledge in the top right-hand corner of the window. Then click Confirm.



You will receive a confirmation screen once this has been completed

Confirmation - Employee Acknowledgement

✔ You have successfully acknowledged this document.

The UUPM Website may be found here:

<https://www.hr.utah.edu/serviceTeams/perfManagement.php>