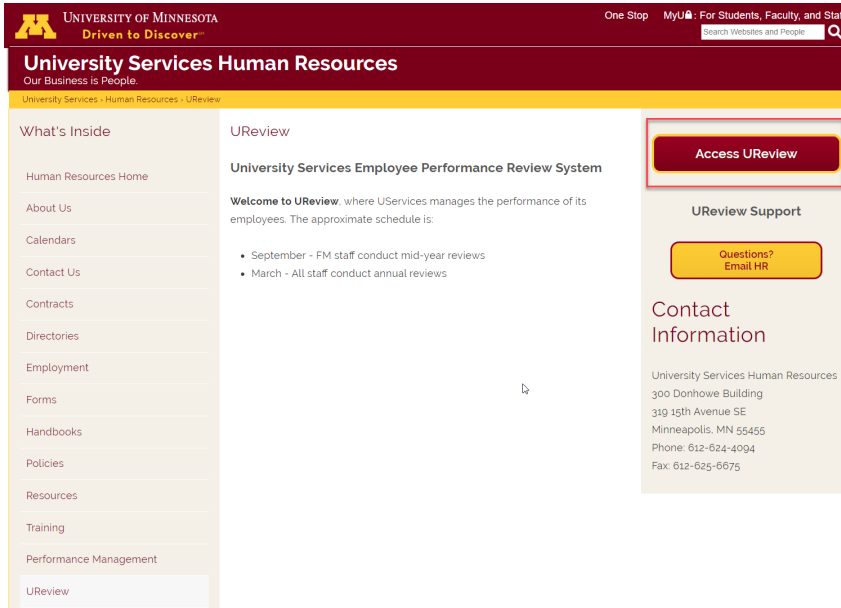


ACCESSING UREVIEW

You can access UReview from the University Services HR website at:

<http://userservices.umn.edu>

Select the UReview link on the left-hand side.



The screenshot shows the University Services Human Resources website. The header includes the University of Minnesota logo and the slogan "Driven to Discover". The main navigation menu on the left lists various HR services, with "UReview" highlighted in a red box. The main content area features a "UReview" section with a "Welcome to UReview" message and a list of review dates. A red box highlights the "Access UReview" button in the top right corner of the main content area.


1. Click on the **Access U Review** button.
2. Sign-in to UReview using your internet ID and password. If you have trouble with your password, you should contact the University's OIT helpline (1-4357).

COMPLETING A YEAR END REVIEW

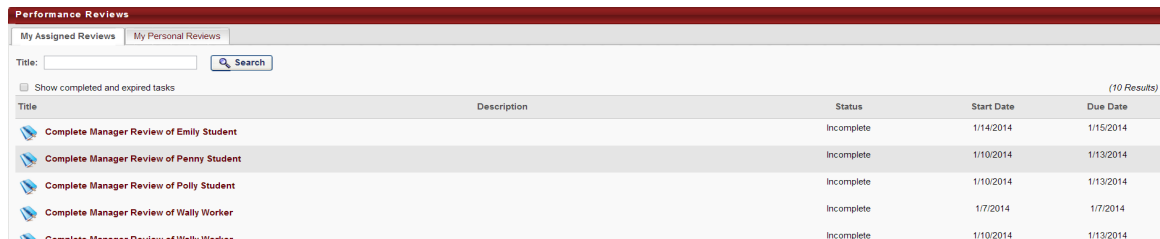
Once your direct reports have completed their self review, you will need to complete the year end review for each direct report.

1. You can either find the year end review for your direct reports under the **Your Tasks** section on the U Learn homepage or from the U Learn homepage, navigate to the **Performance** menu and click on **Performance Reviews** and select the **My Assigned Reviews** tab.

Your Tasks

Your Tasks		Due Date
	Complete Manager Review of Wes Worker	1/6/2014
	Complete Manager Review of Wally Worker	1/7/2014
	Complete Manager Review of Emily Student	1/15/2014

Performance – Performance Reviews

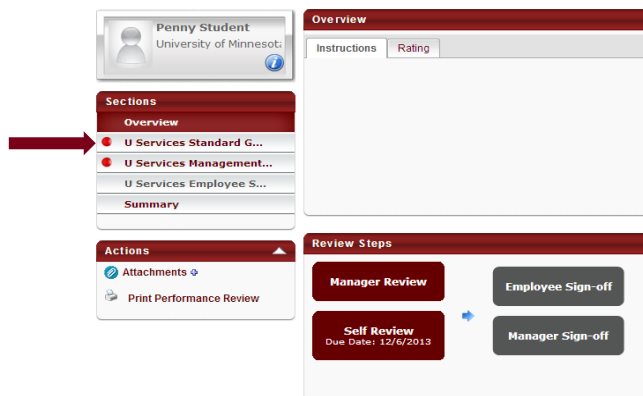


Title	Description	Status	Start Date	Due Date
Complete Manager Review of Emily Student		Incomplete	1/14/2014	1/15/2014
Complete Manager Review of Penny Student		Incomplete	1/10/2014	1/13/2014
Complete Manager Review of Polly Student		Incomplete	1/10/2014	1/13/2014
Complete Manager Review of Wally Worker		Incomplete	1/7/2014	1/7/2014
Complete Manager Review of Wally Worker		Incomplete	1/10/2014	1/13/2014

2. Locate the direct report you will review and click on the **Complete Manager Review** link for this employee.
3. Supervisors are expected to complete both the **Goals Section** and the **Competency Sections** of the Review.

Red light	Indicates the section is required, but has not yet been started
Green light	Indicates that a section has been completed
Yellow Light	Indicates that a section has been started, but has not been completed.

4. Click on the section name to open and select a rating for each goal or competency from the drop-down list.

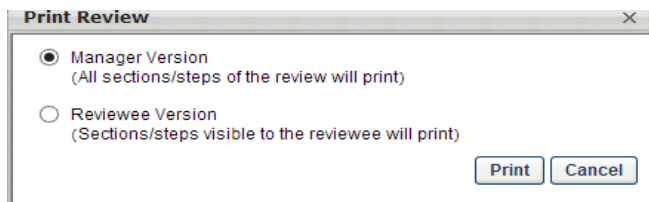


The screenshot shows the 'Overview' page for Penny Student. On the left, there is a 'Sections' menu with 'Overview' selected. A red arrow points to the 'U Services Standard G...' section. Below the menu are 'Actions' (Attachments, Print Performance Review) and 'Review Steps' (Manager Review, Employee Sign-off, Self Review, Manager Sign-off).

5. Click on the section name to open and select a rating for each goal or competency from the drop-down list.
6. Enter comments into the **Comments** field. You will see the employee's self-ratings under each comment field along with any comments the employee made.
7. Click **Save and Continue** to continue with the next section to be rated, or click **Save and Exit** to save this section and continue rating later.
8. In the **Actions** section, click **Print Performance Review** to print the appraisal before submitting it if you would like a printed copy. It is not required to print the appraisal before submitting it.

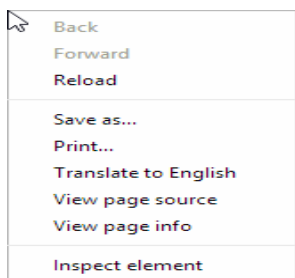


9. Select the version of the review you would like to print.



10. Click the **Print** button to open up the review form.

11. Right-click to select the **Print** option and print the appraisal.



12. Return to the review and Click **Submit** to return the performance appraisal to the employee for signature.

Summary		
Overall Rating: Requires Improvement		
Sections	Self Review	Manager Review
U Services Standard Goal/Objective Rating	Requires Improvement 2.0 / 5.0 (70%)	Requires Improvement 2.0 / 5.0 (70%)
U Services Management Services Competency Section	Successful 3.4 / 5.0 (93%)	Successful 3.0 / 5.0 (80%)
Overall	Requires Improvement 2.4 / 5.0	Requires Improvement 2.3 / 5.0

SIGNING OFF ON THE APPRAISAL

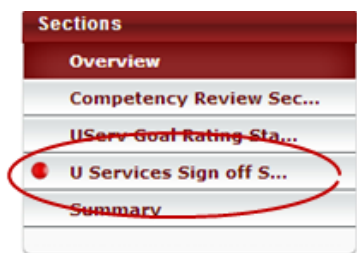
After your direct report(s) sign off on their appraisal, you will need to provide your signature.

1. From the **Your Tasks** section of the UReview Homepage, select **Complete Manager Review** for this employee or access the review for this employee from the **My Team** menu.



Your Tasks	
	Due Date
⚠ Complete Manager Review of Polly Student	12/9/2013
⚠ Complete Manager Review of Penny Student	12/9/2013
Complete Manager Review of Will Worker	1/6/2014

2. Click on Sign-Off section to open this section of the review.



3. In the **Manager** Field, type in your first and last name and click the **Sign** button.
4. Type in any comments (if applicable).
5. Click the **Submit** button to sign off on the appraisal.

U Services Manager Sign-off

My signature below indicates that I reviewed and completed the performance evaluation on Polly Student.

Manager
(Type First Name and Last Name)

REVIEWING OR EDITING GOALS ASSIGNED TO A DIRECT REPORT

To review, edit, print, or delete goals assigned to a direct report, go to **Performance**→**Goals** and select the **Team Goals** tab.



1. Find the direct report that you would like to review and click the funnel button to the right of that employee.
2. This will give you a view of the title of each goal assigned to an employee. Via the buttons to the right of the goal, you can edit or delete a goal as appropriate.

Title	Due Date	Weight	Status	Results Final	Progress	Options
Emily Student					4%	⌵
Ernie Student					12%	⬆
Develop Project Management Course for University Services	6/30/2014	0%	On Track	<input type="checkbox"/>	0%	🔍 🖨️ ✖
Participate as a team member on the ULearn Performance Management Project	6/30/2014	0%	On Track	<input type="checkbox"/>	25%	🔍 🖨️ ✖

3. To view and/or print all goals for a direct report on one screen, select the Adobe button in the right hand side of the screen.

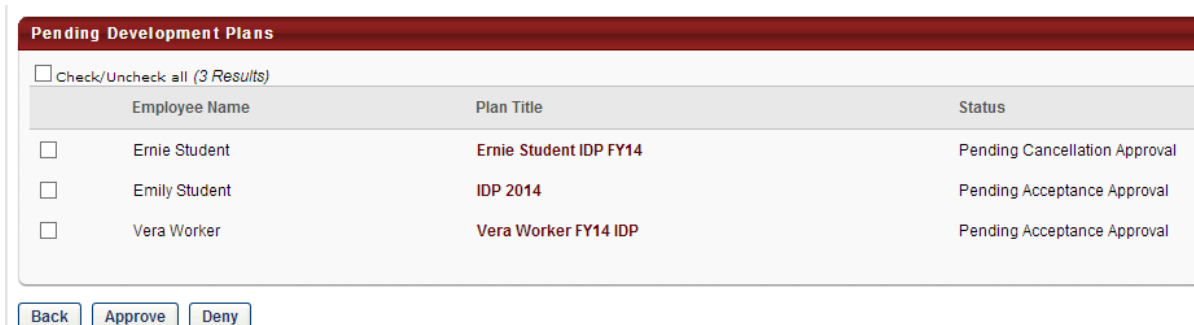
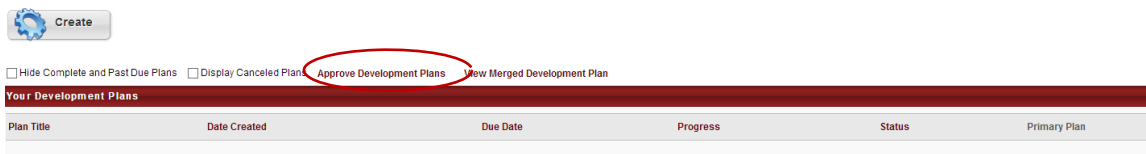
Title	Due Date	Weight	Status	Results Final	Progress	Options
Emily Student					4%	⌵
Ernie Student					12%	⬆
Develop Project Management Course for University Services	6/30/2014	0%	On Track	<input type="checkbox"/>	0%	🔍 🖨️ ✖
Participate as a team member on the ULearn Performance Management Project	6/30/2014	0%	On Track	<input type="checkbox"/>	25%	🔍 🖨️ ✖
Penny Student					0%	⬆
Polly Student					1%	⬆

4. This will open the goals in another browser tab. From this tab, you can select **File** and then **Print** if you choose.
5. These steps can be repeated for each direct report that you would like to view.

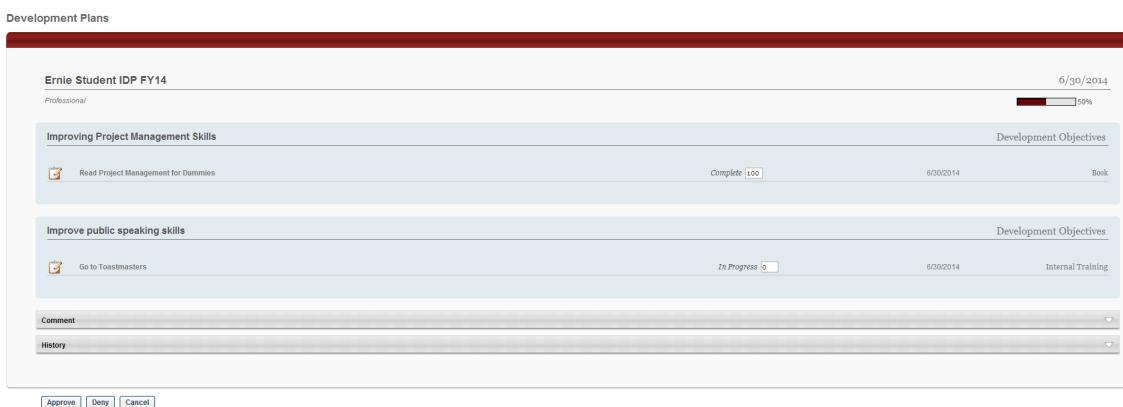
APPROVING AN IDP

Employees can work with their supervisors to capture their individual-based development plans (IDP) using UReview. It is up to the individual supervisor whether or not these are required for their employees.

1. Select **Performance-->Development Plans**.
2. Click on **Approve Development Plans**. You will see all development plans that are pending approval.



3. Click on the link for the IDP you are approving to open the plan to review.



4. Click the **Approve or Deny** button as appropriate for the IDP for this employee.

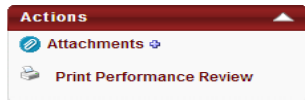
PRINTING AN APPRAISAL

To print a past review done in UReview, go to **Performance→Performance Reviews** and select the **My Assigned Reviews** tab. This will display a history of reviews in UReview.

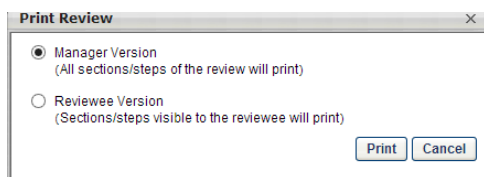


Title	Description	Status	Start Date	Due Date
Complete Manager Review of Emily Student		Complete	11/14/2013	12/9/2013
Complete Manager Review of Ernie Student		Complete	11/14/2013	12/9/2013

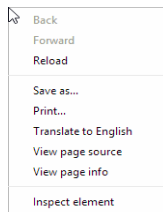
1. Select the review to open it.
2. Select **Print Performance Review** from the **Actions** section.



3. Select the version of the review you would like to print and click the **Print** button.



4. Right-click to select the **Print** option.



5. Print the review.
6. Click **Save and Exit** to return to the list of reviews for your direct reports.