



UReview Performance Management System Employee Guide

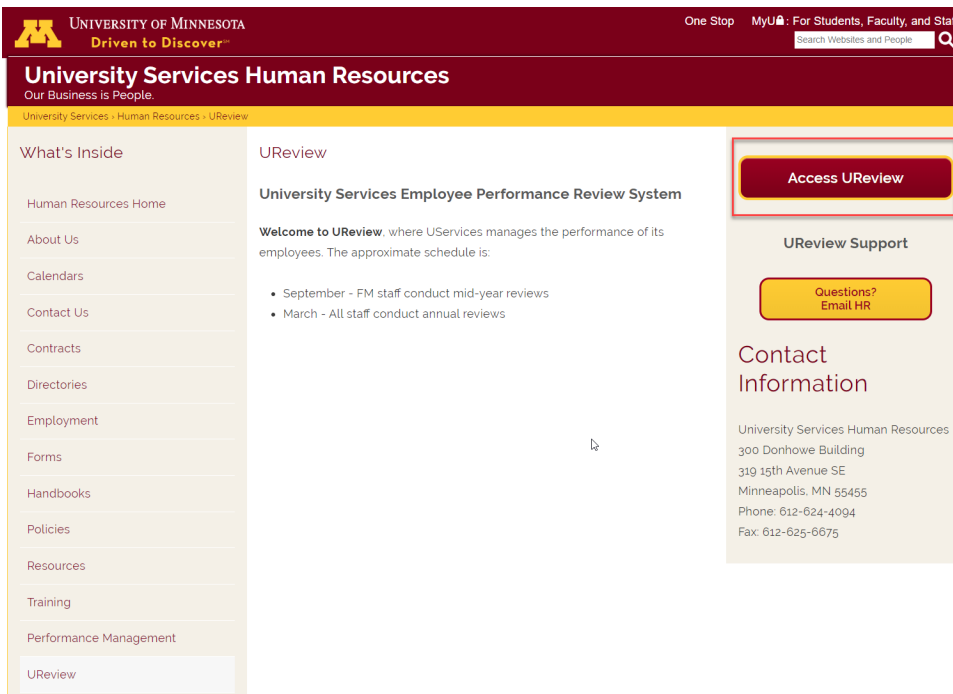
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ACCESSING UREVIEW

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 text "University Services Human Resources". The left-hand navigation menu is expanded, showing a list of links including "UReview". The main content area displays the "UReview" page, which includes a "Welcome to UReview" message and a list of review dates: "September - FM staff conduct mid-year reviews" and "March - All staff conduct annual reviews". A red box highlights the "Access UReview" button in the right-hand sidebar.

1. Click on the **Access UReview** 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).

REVIEWING GOALS/COMPLETING A SELF REVIEW

You can view the goals assigned to you by your supervisor by viewing your Self Review. The Self Review is completed at year-end. At year-end you will be expected to rank your performance according to the goals assigned to you by your supervisor.

1. From the **Your Tasks** section of the UReview HomePage, select **Complete Self Review**.



The screenshot shows the "Your Tasks" section of the UReview homepage. It features a table with a header row containing "Due Date". Below the header, there is a single row with the text "Complete Self Review" and the date "1/3/2014".

	Due Date
Complete Self Review	1/3/2014

Employees are expected to complete both the **Goals Section** and the **Competency Section** of the Self Review.

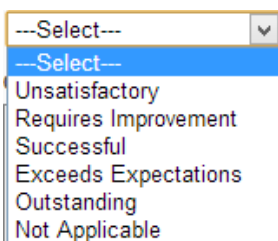
Red light – Indicates the section is required, but has not yet been started.

Green light – Indicates that a section has been completed.

Yellow light – Indicates that a section has been started, but has not been completed.



2. Click on the section name to open that section of the review.
3. Select a rating for each competency or goal from the drop-down list based on what you feel is appropriate for your performance.



4. Enter any comments in the **Comments** field. (Optional).
5. Click **Save and Continue** to continue with the next section or click **Save and Exit** to save this section and continue rating at a later time.
6. When you have completed the review and are satisfied with your rankings click **Submit** to submit your Self Review to your supervisor.

Summary		
Sections	Self Review	Manager Review
U Services Standard Goal/Objective Rating	Successful 3.0 / 5.0 (70%)	-
U Services Management Services Competency Section	Successful 3.0 / 5.0 (30%)	-
Overall	Successful 3.0 / 5.0	-

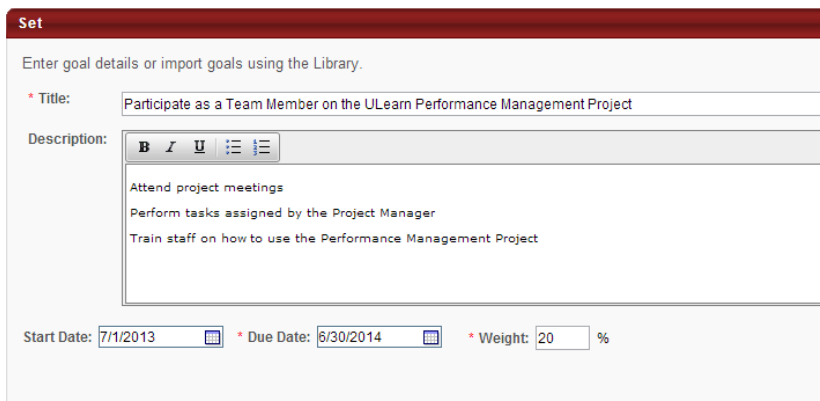


CREATING GOALS (OPTIONAL)

Some managers may request that employees create their own goals which will then be reviewed and approved by the manager.

1. Select **Performance** → **Goals**.
2. Select the **Create** button.

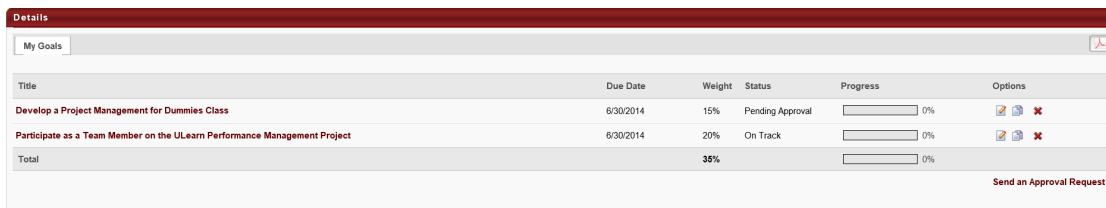
Create Goals



- In the **Title** field, enter a title for the goal.
- In the **Description** field, enter a more detailed description of the goal.
- Enter a weight for the goal. All the goals entered for the employee must add up to 100%.

Note: If no weight is assigned to the goal, then UReview will automatically calculate an equal weight for all goals.

- Click the **Submit** button.



Title	Due Date	Weight	Status	Progress	Options
Develop a Project Management for Dummies Class	6/30/2014	15%	Pending Approval	0%	
Participate as a Team Member on the ULearn Performance Management Project	6/30/2014	20%	On Track	0%	
Total		35%		0%	

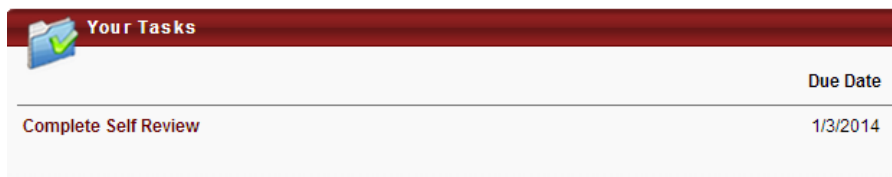
[Send an Approval Request](#)

- Click the **Send an Approval Request** link to request that your manager will approve this request.

SIGNING OFF THE APPRAISAL

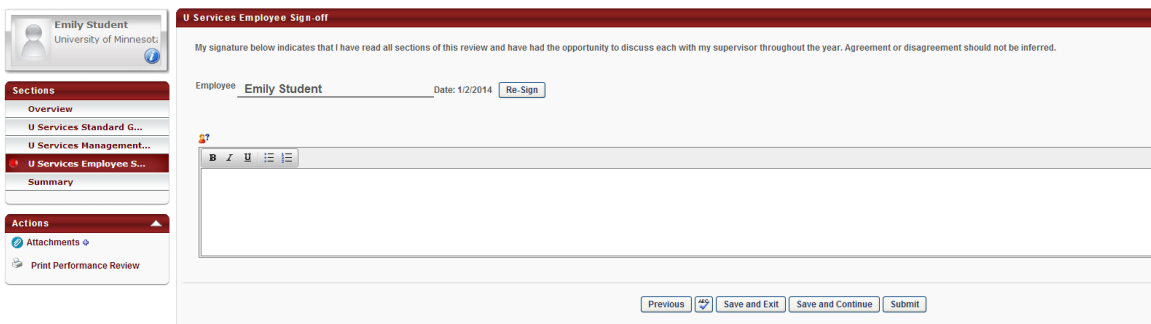
Once your supervisor completes their portion of your performance appraisal, you will need to sign off on your appraisal.

- From the **Your Tasks** section of the UReview Homepage, select **Complete Self Review**.

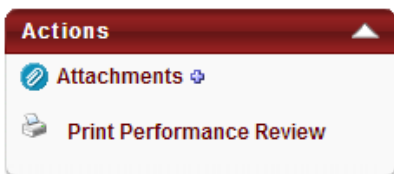


Your Tasks	
	Due Date
Complete Self Review	1/3/2014

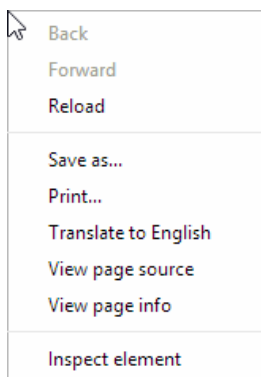
- Click on **Sign-Off** section to open this section of the review.



3. In the **Employee** field, type in your first and last name and click the **Sign** button.
4. Type in any comments (if applicable).
5. In the **Actions** section, click **Print Performance Review** to print the appraisal before submitting it if you would like a printed copy.



6. Right-click to select the **Print** option and print the document.



7. Return to the performance appraisal review and click the **Submit** button.

CREATING AN IDP (OPTIONAL)

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. To enter your IDP into UReview, complete the following steps.

1. Select **Performance** → **Development Plans**.

Development Plan: Penny Student

Use the Development Plan to match your training to your career objectives. You may request training, update your progress, add and read comments when you ma



Hide Complete and Past Due Plans Display Canceled Plans **View Merged Development Plan**

Your Development Plans			
Plan Title	Date Created	Due Date	Progress

2. Click the **Create** button.

Create a Development Plan

Define your development plan by adding objectives and action steps

Details

Title:

Progress:

Category:

Status: New

Description:

B I U L I

IDP for FY14

3. In the **Title** field, enter a title for the plan.
4. In the **Description** field, enter a description for the pl
5. Click **Add Objective** to and enter an objective title.

Add Recommended Training **Add Objective**

Objective Title: Development Objectives:

Attend Toastmaster Meetings on Campus
 Progress: 8/30/2014

6. Click the **Add Action Step** icon and enter an action step for the objective. *An action step is required for each objective.*
7. Continue entering IDP objectives by clicking **Add Objective**. It is recommended that an IDP have no more than 3 objectives.
8. Click the **Save as Draft** button to save your IDP if you are not ready to submit or click the **Submit** button to submit to your supervisor for review/approval.

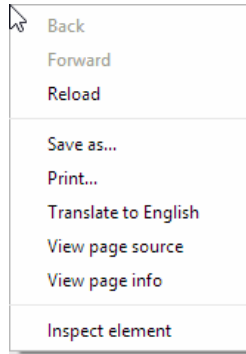
PRINTING A COMPLETED APPRAISAL

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



Performance Reviews						
My Assigned Reviews		My Personal Reviews				
Review	Review Period	Start Date	Completion Date	Task Status	Rating	Attachments
U Services Demonstration Process FY14	7/1/2013 - 6/30/2014	11/14/2013	1/2/2014	Complete	--	(1 Results)

1. Select the review to open it.
2. Right-click to select the **Print** option.



3. Print the review.