



UReview Performance Management System Manager Guide

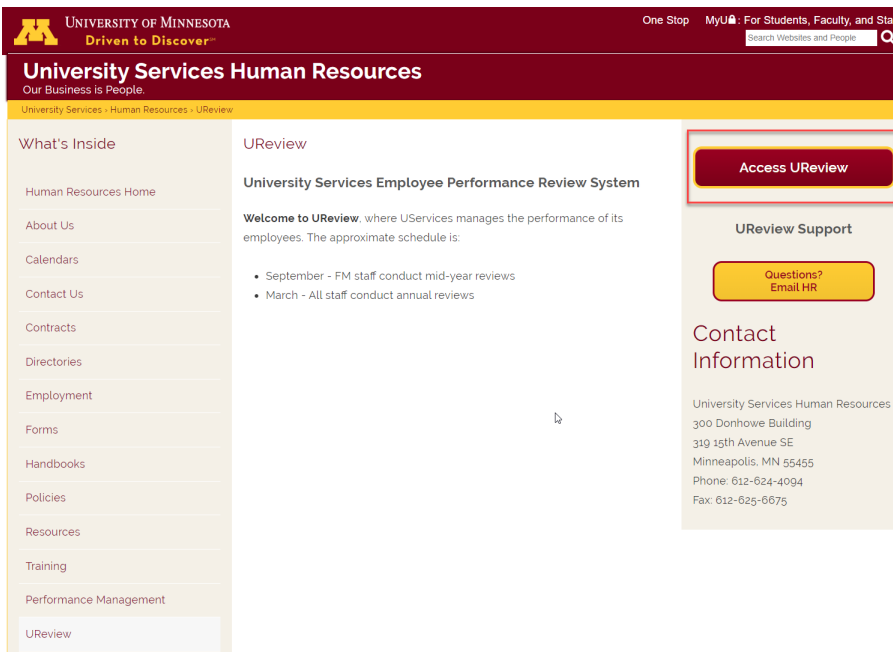
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ACCESSING UREVIEW

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 top navigation bar includes the University of Minnesota logo, the text "UNIVERSITY OF MINNESOTA Driven to DiscoverSM", and a search bar. The main header reads "University Services Human Resources" with the tagline "Our Business is People." Below the header, there is a navigation menu on the left with the following items: What's Inside, Human Resources Home, About Us, Calendars, Contact Us, Contracts, Directories, Employment, Forms, Handbooks, Policies, Resources, Training, Performance Management, and UReview. The UReview link is highlighted. The main content area is titled "UReview" and "University Services Employee Performance Review System". It includes a "Welcome to UReview" message and a list of review schedules: "September - FM staff conduct mid-year reviews" and "March - All staff conduct annual reviews". On the right side, there is a "UReview Support" section with a "Questions? Email HR" button and a "Contact Information" section with the address: "University Services Human Resources, 300 Donhowe Building, 319 15th Avenue SE, Minneapolis, MN 55455, Phone: 612-624-4094, Fax: 612-625-6675". A red box highlights the "Access UReview" button in the top right corner of the main content area.

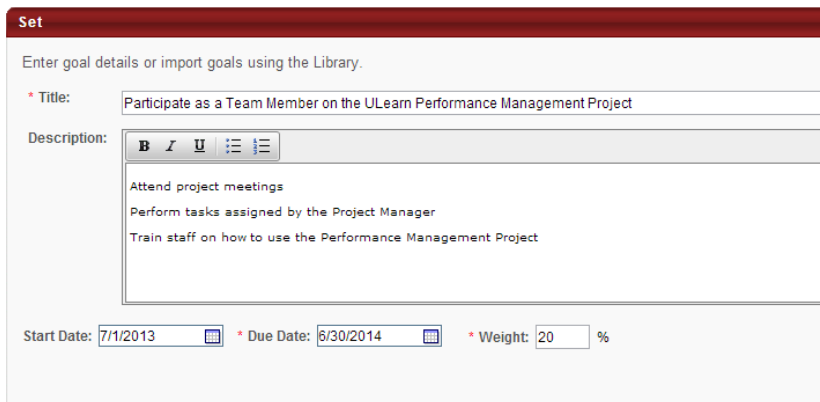
1. Click on the **Access UReview** button.
2. Sign-in to UReview using your internet ID and password. If you have trouble with your password, you should contact the University's OIT helpline (1-4357).

CREATING AND ASSIGNING GOALS

A goal can be assigned to an individual or to all of your direct reports. The weight of all the goals assigned to an employee need to add up to 100%. If no weight is assigned to the goal, then UReview will automatically calculate an equal weight for each goals(e.g., if an employee has 4 goals, then each will be weighted at 25%).

1. Select **Performance-->Goals**.
2. Select the **Create** button.

Create Goals

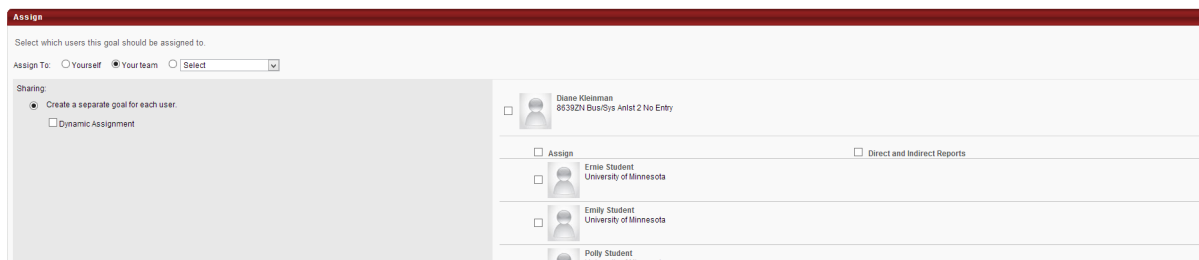


3. In the **Title** field enter a title for the goal.
4. In the **Description** field, enter a more detailed description of the goal.
5. Enter a weight for the goal. All the goals entered for the employee must add up to 100%.

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

6. Click **Next** to assign the goal to an employee or employees.
7. Click **Your Team** to assign this goal to one or more team members.

Create Goals

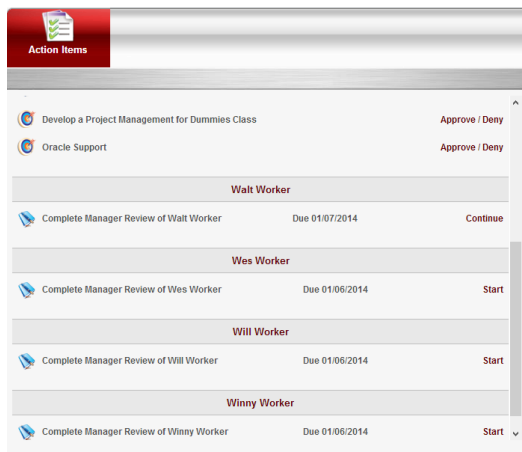


8. Click the **Assign** button to assign to all team members, or select them individually.
9. Select **Dynamic Assignment** if this goal will apply to future hires in the same position.
10. Click **Submit**.

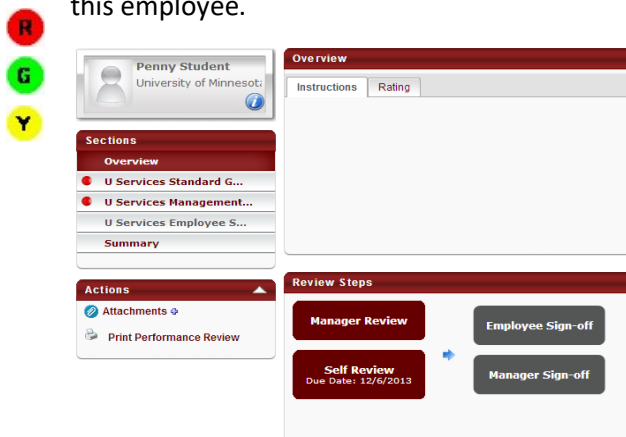
COMPLETING A YEAR END REVIEW

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

1. From the U Learn homepage, navigate to the **My Team** tab and click on **My Team**.



2. Locate the direct report you will review and click on the **Complete Manager Review** link for this employee.



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.

11. Click on the section name to open and select a rating for each goal or competency from the drop-down list.
12. 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.
13. 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.
14. Click **Submit** to return the performance appraisal to the employee for signature.

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.



	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

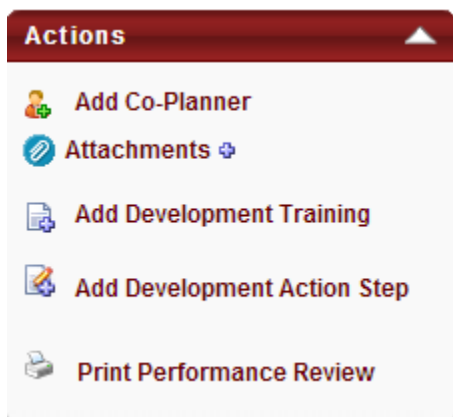
2. Click on **Sign-Off** section to open this section of the review.



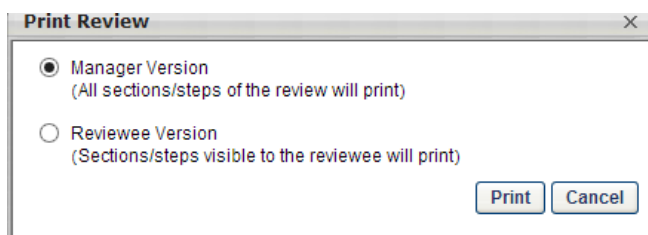
3. In the **Manager** Field, type in your first and last name and click the **Sign** button.



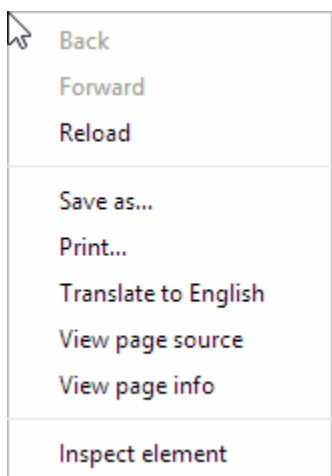
4. Type in any comments (if applicable).
5. In the **Actions** section, click **Print Performance Review** to print the appraisal before submitting it if you would like a printed copy. It is not required to print the appraisal before submitting it.



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



7. Click the **Print** button to open up the review form.
8. Right-click to select the **Print** option and print the appraisal.



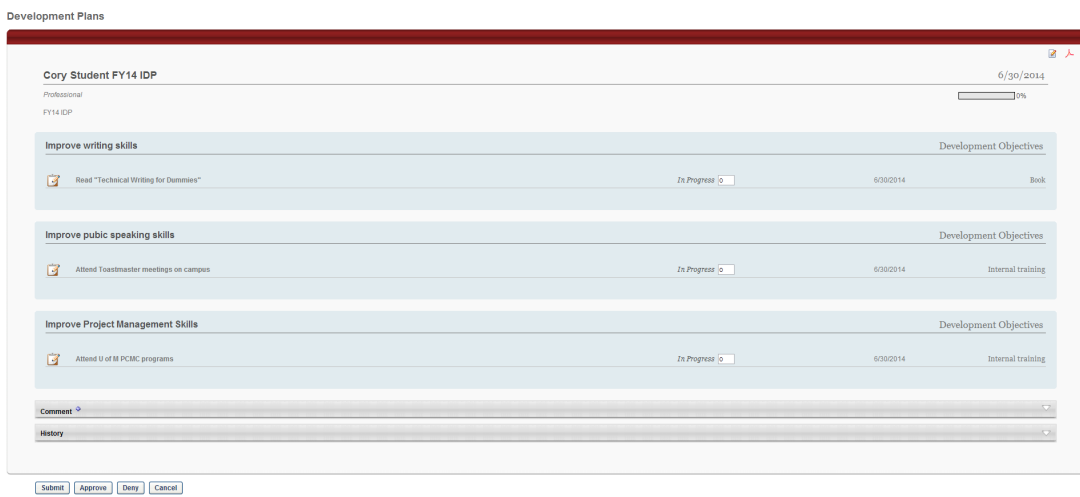
9. Return to the review and Click the **Submit** button to sign off on the appraisal.

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**.

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



Development Plans

Cory Student FY14 IDP 6/30/2014

Professional 0%

FY14 IDP

Development Objectives	In Progress	Due Date	Resource
Improve writing skills <input checked="" type="checkbox"/> Read "Technical Writing for Dummies"	<input type="checkbox"/>	6/30/2014	Book
Improve public speaking skills <input checked="" type="checkbox"/> Attend Toastmaster meetings on campus	<input type="checkbox"/>	6/30/2014	Internal training
Improve Project Management Skills <input checked="" type="checkbox"/> Attend U of M PCMC programs	<input type="checkbox"/>	6/30/2014	Internal training

Comment

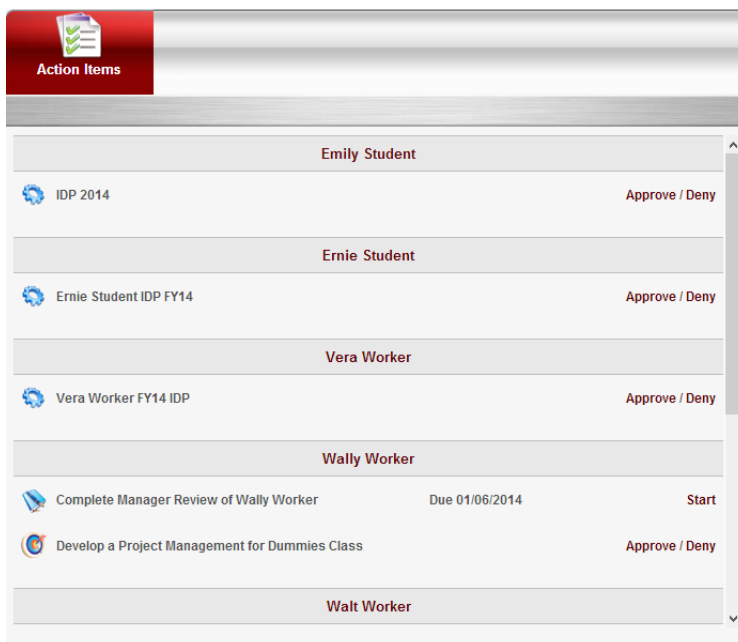
History

- Click the **Approve** button to approve the IDP for this employee.

APPROVING GOALS SUBMITTED BY EMPLOYEES

Some managers may prefer that the employee create their own goals. Follow these steps to review and approve goals created by employees. Managers will receive an email when a goal needs to be approved.

- Click the **My Team** menu.



Action Items		
Emily Student		
	IDP 2014	Approve / Deny
Ernie Student		
	Ernie Student IDP FY14	Approve / Deny
Vera Worker		
	Vera Worker FY14 IDP	Approve / Deny
Wally Worker		
	Complete Manager Review of Wally Worker	Due 01/06/2014 Start
	Develop a Project Management for Dummies Class	Approve / Deny
Walt Worker		

2. Click **Action Items** to see a list of items that are pending approval.
3. Click the **Approve/Deny link**.
4. Click the **General** icon to make any edits.
5. Click the **Approve** or Deny button.

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 arrow to the right of that employee.

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%	🔍 🖨️ ✖️


2. This will give you a view of the title of each goal assigned to an employee. Using the buttons to the right of the goal, you can edit or delete a goal as appropriate.
3. To view and/or print all goals for a direct report on one screen, select the **View/Print** button on 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%	▼
Prilly 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.

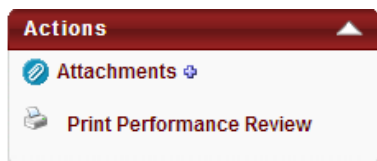
PRINTING A COMPLETED APPRAISAL

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.

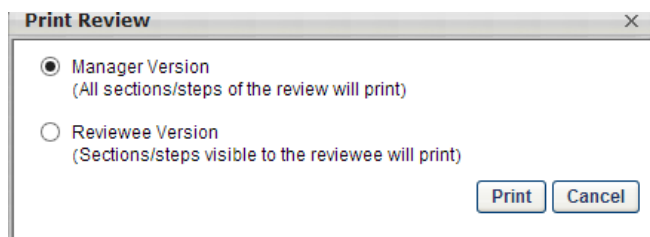


Title	Description	Status	Start Date	Due Date
Complete Manager Review of Emily Student		Complete	11/14/2013	12/9/2013
Complete Manager Review of Ernie Student		Complete	11/14/2013	12/9/2013

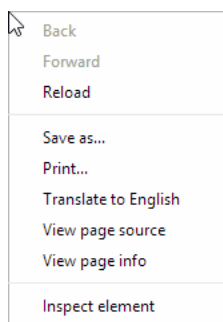
1. Select the review to open it.
2. Select **Print Performance Review** from the **Actions** section.



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.