

Align Training Guide

CEMRP FY25 Deliverable Setting

UCI Human Resources
Empower People Success

WELCOME TO Align

We are pleased to introduce Align, UCI's new performance program for non-represented staff. Align can be summarized in three words

- Purposeful
- Flexible
- Simple

UCI Human Resources

Align Performance Program

- A** Align priorities and establish key deliverables with your leader
- B** Between check-ins, have regular 1:1s to discuss progress on key deliverables, seek and receive feedback, and make adjustments where needed
- C** Check-in with your leader to review the outcomes and expectations
- D** Discuss what to focus on next, what support or development is needed, and what opportunities lie ahead

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CO-WORKER CEMRP DELIVERABLE SETTING

The CEMRP Deliverable Setting will be completed using the [Create/Verify Deliverables](#) task in Align.

Click here

The screenshot displays the UCI Align Performance Program dashboard. At the top, it says 'Hi, [User Name]' and 'Welcome to your performance review dashboard'. Below this are four filter boxes: 'Filter by employee', 'Filter by review status', 'Filter by review type', and 'Filter by review period'. The main section is titled 'MY OPEN TASKS' and contains three cards: 'All Open Tasks' (Total 1), 'My Review Tasks' (Set Key Deliverables 1, My Self Assessments 0), and 'Leadership Tasks' (Key Deliverables for My Employees 0, Assessment of...). The 'All Open Tasks' card is expanded to show a task: 'Create/Verify Deliverables' with a sub-task 'CEMRP • FY-2025 - Ready • Due: 2024-10-15'. Below this is the 'MY REVIEWS' section, which includes 'Active Reviews' (FY-2025 - CEMRP • Deliverable Setting), 'Closed Reviews' (No Records Found), and 'Archived Reviews' (No Records Found).

CO-WORKER DELIVERABLE SETTING

- Enter the information for all three CEMRP deliverables. Include deliverable title, description and the three levels of achievement.
- All three deliverables must be completed before you are able to submit.
- Select “save edits” then the submit button will become available.
- Select “Submit” to advance for approval
- Once you select “Submit” you **WILL NOT** be able to modify.

UCI / Align Performance Program

Dashboard All Tasks & Reviews

CEMRP: FY-2025 | Create/Verify Deliverables Review ID: REV0010347

Due Date: 10/15/2024

Deliverable Setting ✓ Deliverable Approval Deliverable Finalization In Progress Self Assessment Leadership Assessment Assessment Finalization Closed

Ashley Szocinski

UCInetID: aszocins
Employee number: 10749801
Manager: Diana Ramos
Indirect Manager: Angie Labadie
Primary appointment type: Staff: Career
Job Code Description: REVENUE CYCLE HC SUPV 2
Department: Revenue Integrity
Department ID: 428534
Division: Medical Center
Subdivision: Administration

State | Draft

Deliverable #3

Key Deliverable Description *

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time.
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

Save Edits Submit

Step 1 **Step 2** **Step 3**

LEADER CEMRP APPROVAL

The leader CEMRP deliverable approval process will be completed using the [Approve Employee Deliverables](#) task in Align.

The screenshot displays the UCI Align Performance Program dashboard. At the top, it says "UCI Align Performance Program" and "Hi, [User Name] Welcome to your performance review dashboard". Below this are three filter boxes: "Filter by employee", "Filter by review status", and "Filter by review type". A section titled "MY OPEN TASKS" contains three cards: "All Open Tasks" with a total of 2, "My Review Tasks" with 1 Set Key Deliverables and 0 My Self Assessments, and "Key Deliverables for My Employees". Below these cards is a list of tasks under the heading "All Open Tasks". The first task is "Create/Verify Deliverables" (CEMRP • FY-JW Test • Past Due • Due: 2024-08-28). The second task, "Approve Employee Deliverables" (CEMRP • FY-2025 • Ready • Due: 2024-10-22), is highlighted in blue and has a yellow arrow pointing to it with the text "Click here" next to it.

LEADER APPROVAL

- Review the CEMRP Deliverables provided, if correct and appropriate select “Approve Deliverable”
- If revisions are needed the leader can:
 - Make the needed revisions, **OR**
 - Send back to co-worker using the “Needs Revisions” button.
- Action must be taken on all three deliverables before you are able to submit.
- Select “Submit” to advance for finalization.
- You may change your action prior to submission using the “Undo” button.

The screenshot displays the UCI Align Performance Program interface. At the top, it shows the title "CEMRP: FY-2025 | Approve Employee Deliverables" and a due date of 10/22/2024. A progress bar indicates the current step is "Deliverable Approval". Below the progress bar, there are three deliverables, each with a status: "#1: Pending Finalization", "#2: Pending Finalization", and "#3: Pending Approval".

The main content area shows a detailed view for "Deliverable #3". It includes a "Key Deliverable Description" section with a text editor. The description text is: "Provide Title of CEMRP Deliverable. Include a detailed description of CEMRP deliverable. Include the three levels of achievement, these should be specific, measurable and stretch. • Thresholds: should be set such that they are achieved about 80-90% of the time. • Targets: should be set such that they are achieved about 50-60% of the time. • Outstanding: should be set such that they are achieved about 10-20% of the time." Below the text editor, there are three buttons: "Approve Deliverable" (highlighted in orange), "Save Edits", and "Needs Revision".

At the bottom of the interface, there is a "Submit" button. A "Comments/Progress" section shows "#3 Comments/Progress".

Yellow arrows labeled "Step 1", "Step 2", and "Step 3" point to the "Approve Deliverable" button, the "Needs Revision" button, and the "Submit" button, respectively. A yellow arrow labeled "Review" points to the text editor area. A yellow arrow labeled "Undo" points to the "Undo" button in the bottom left corner.

REVISIONS: LEADER

- If you are not able to make needed revisions and need to re-route select “Needs Revision”
- Enter revision comments then select “Save Deliverable Revision Comments”
- Select “Submit” on the task in order for the revision request to be sent.
- Deliverables re-routed for revision will be sent to the co-worker and will be submitted through the approval process again.
- Approved deliverables will be routed the finalization.

UCI Align Performance Program

Dashboard All Tasks & Reviews

CEMRP: FY-2025 | Approve Employee Deliverables | Review ID: REV0009716

Due Date: 10/22/2024

Deliverable Setting ✓ Deliverable Approval ✓ Deliverable Finalization In Progress Self Assessment Leadership Assessment Assessment Finalization Closed

#1: Needs Revision #2: Pending Finalization #3: Pending Approval

State | Pending Approval

Deliverable #3

Key Deliverable Description *

Review

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time .
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

Approve Deliverable Save Edit **Needs Revision** Submit

Step 1

Step 3

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FY-2025 Deliverable #1

Deliverable Revision Comments

The leader can return the CEMRP deliverable for edits

Step 2

*** This comment will be visible to the employee ***

Save Deliverable Revision Comments Cancel

Key Deliverable Description

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time.
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

INDIRECT LEADER APPROVAL

The indirect leader CEMRP approval process will be completed using the **Finalize Employee Deliverables** task in Align.

The screenshot shows the UCI Align Performance Program dashboard. At the top, there is a navigation bar with 'Dashboard' and 'All Tasks & Reviews'. Below this, a greeting says 'Hi, [User Name] Welcome to your performance review dashboard'. There are four filter boxes: 'Filter by employee', 'Filter by review status', 'Filter by review type', and 'Filter by review period'. The main section is titled 'MY OPEN TASKS' and contains three cards: 'All Open Tasks' (Total 4), 'My Review Tasks' (Set Key Deliverables 2, My Self Assessments 0), and 'Leadership Tasks' (Key Deliverables for My Employees 2, Assessment of My Employees 0). Below these cards is a list of tasks under the heading 'All Open Tasks'. The first task, 'Finalize Employee Deliverables | CEMRP - FY-2025 - Ready - Due: 2024-10-22', is highlighted with a yellow arrow and the text 'Click here'.

INDIRECT LEADER APPROVAL

- Review the CEMRP Deliverables provided, if correct and appropriate select “Approve Deliverable”
- If edits are needed the Indirect leader can make the needed revisions. The leader may also send back to the co-worker using the “Needs Revisions” button.
- Action must be taken on all three deliverables before you are able to submit.
- Select “Submit” to approve.
- You may change your action prior to submission using the “Undo” button.

UCI Align Performance Program

Dashboard All Tasks & Reviews

CEMRP: FY-2025 | Finalize Employee Deliverables | Review ID: REV0010347

Due Date: 10/22/2024

Deliverable Setting ✓ Deliverable Approval ✓ **Deliverable Finalization** ✓ In Progress Self Assessment Leadership Assessment Assessment Finalization Closed

UCInetID
Employee number
Manager
Indirect Manager
Primary appointment type
Job Code Description
Department
Department ID
Division
Subdivision

Deliverable #3

Key Deliverable Description *

Review

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time.
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

Approve Deliverable Save Edits Needs Revision

Step 1

Step 2

Step 3

Submit

Undo

Submit

#3 Comments/Progress

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REVISIONS: INDIRECT LEADER

- If you are not able to make needed revisions and need to re-route select “Needs Revision”
- Enter revision comments then select “Save Deliverable Revision Comments”
- Select “Submit” on the task in order for the revision request to be sent.
- Deliverables re-routed for revision will be sent to the co-worker and will be submitted through the approval process again.
- Approved deliverables will be routed the finalization.

UCInetID
Employee number
Manager
Indirect Manager
Primary appointment type
Job Code Description
Department
Department ID
Division
Subdivision

FY-2025 Deliverable #1

Deliverable Revision Comments

The leader can return the CEMRP deliverable for edits

*** This comment will be visible to the employee ***

Save Deliverable Revision Comments Cancel

Key Deliverable Description

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time.
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

Step 2

#1: Approved #2: Approved #3: Pending Finalization
State | Pending Finalization

Deliverable #3

Key Deliverable Description *

Review

Provide Title of CEMRP Deliverable

Include a detailed description of CEMRP deliverable.

Include the three levels of achievement, these should be specific, measurable and stretch.

- Thresholds: should be set such that they are achieved about 80-90% of the time.
- Targets: should be set such that they are achieved about 50-60% of the time.
- Outstanding: should be set such that they are achieved about 10-20% of the time.

Approve Deliverable Save Edits Needs Revision

Step 1

Submit

Step 3

HELP AND RESOURCES

- Visit <https://www.hr.uci.edu/partnership/align/> for information about the [ALIGN](#) system
- For questions or trouble shooting please submit a ticket with the EEC [here](#)

ALIGN & CEMRP SUPPORT

UCI Employee Experience Center (EEC)
Monday – Friday, 8:30 a.m. – 5:00 p.m.
eec@uci.edu • 949.824.0500
Live Chat
Open a Support Ticket for Align



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UCI'S SINGLE SOURCE FOR EMPLOYEE SUPPORT

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