

Align Training Guide

CEMRP 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 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 'Hi, [User Name]' and 'Welcome to your performance review dashboard' is displayed. There are four filter boxes: 'Filter by employee', 'Filter by review status', 'Filter by review type', and 'Filter by review per'. 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, Asses). Below these cards is a section for 'All Open Tasks' with a task titled 'Create/Verify Deliverables' for 'CEMRP' with a progress bar and 'Ready + Due:' information. The bottom section is 'MY REVIEWS', which includes 'Active Reviews' (FY: [Progress Bar], 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- [redacted] | Create/Verify Deliverables Review ID: REV0010347

Due Date: [redacted]

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

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

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

Submit

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, the logo reads "UCI / Align Performance Program". Below the logo is a navigation bar with "Dashboard" and "All Tasks & Reviews". A personalized greeting "Hi, [blurred name]" and "Welcome to your performance review dashboard" is shown. There are three filter boxes: "Filter by employee", "Filter by review status", and "Filter by review type". A section titled "MY OPEN TASKS" contains three main 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 E". Below these is a detailed view of "All Open Tasks" with two items: "Create/Verify Deliverables" and "Approve Employee Deliverables". A yellow arrow points to the "Approve Employee Deliverables" task, 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.

UCI Align Performance Program

Dashboard All Tasks & Reviews

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

Due Date:

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

Step 1 State | Pending Approval

Deliverable #3

KeyDeliverable 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 2

Step 3

Submit

Undo

Submit

#3 Comments/Progress

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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- | Approve Employee Deliverables | Review ID: REV0009716

Due Date:

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

#1: Pending Finalization #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 Edits **Needs Revision** Submit

Step 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.

Step 3

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INDIRECT LEADER APPROVAL

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

The screenshot displays the UCI Align Performance Program dashboard. At the top, the logo 'UCI / Align Performance Program' is visible. Below the logo, there are navigation tabs for 'Dashboard' and 'All Tasks & Reviews'. A user greeting 'Hi, [Profile Picture]' and 'Welcome to your performance review dashboard' is shown. Below the greeting, there are four filter boxes: 'Filter by employee', 'Filter by review status', 'Filter by review type', and 'Filter by review period'. The main content area is titled 'MY OPEN TASKS' and is divided into three sections: 'All Open Tasks', 'My Review Tasks', and 'Leadership Tasks'. The 'All Open Tasks' section shows a total of 4 tasks. The 'My Review Tasks' section shows 2 'Set Key Deliverables' and 0 'My Self Assessments'. The 'Leadership Tasks' section shows 2 'Key Deliverables for My Employees' and 0 'Assessment of My Employees'. A yellow arrow points to the 'Finalize Employee Deliverables' task in the 'All Open Tasks' list, with the text 'Click here' next to it.

Task Name	Status
Total	4
Set Key Deliverables	2
My Self Assessments	0
Key Deliverables for My Employees	2
Assessment of My Employees	0

Finalize Employee Deliverables | CEMRP • FY • Ready • Due

Finalize Employee Deliverables | CEMRP • FY • Ready • Due

Create/Verify Deliverables | CEMRP • FY • Ready • Due

Create/Verify Deliverables | CEMRP • FY • Past Due • Due

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-____ | Finalize Employee Deliverables | Review ID: REV0010347

Due Date: _____

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

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

Step 1 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.

Step 2

Approve Deliverable Save Edits Needs Revision

Step 3

Submit

Undo **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.

UCI Align Performance Program

Dashboard All Tasks & Reviews

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

Due Date: XXXX-XX-XX

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

#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

Submit

Step 3

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.

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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](#)



EMPLOYEE EXPERIENCE CENTER
UCI'S SINGLE SOURCE FOR EMPLOYEE SUPPORT

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