

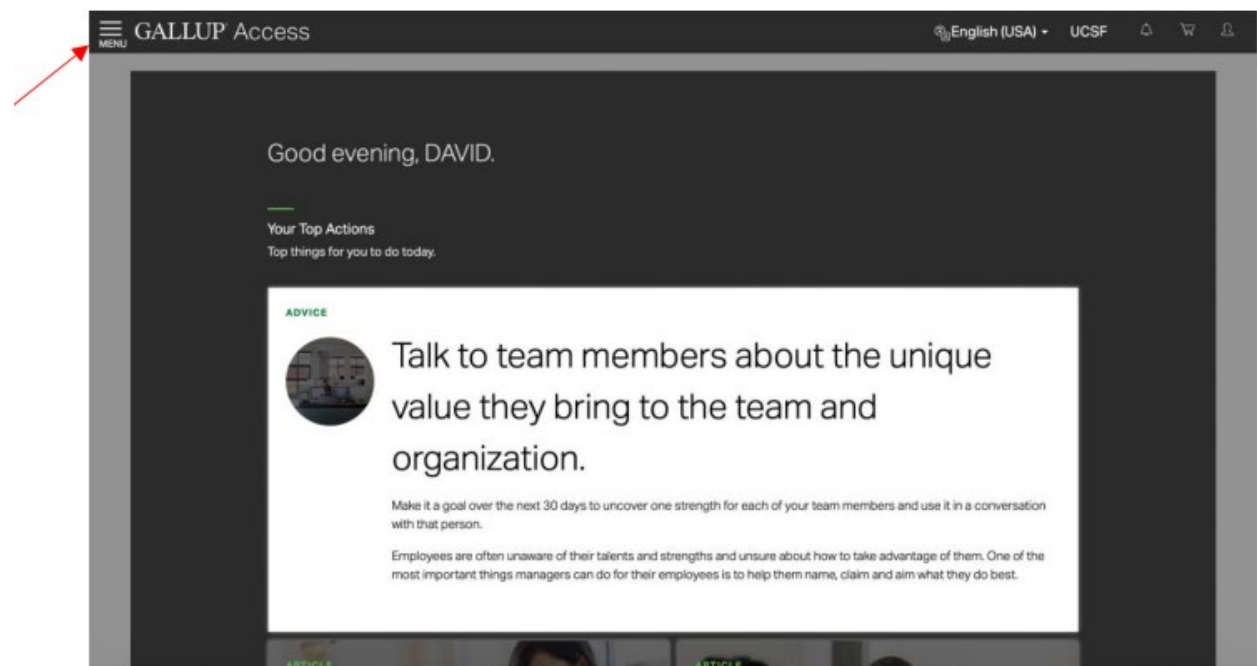
Tracking your direct reports' Engagement Action Plans in Gallup Access

UCSF Engagement Manager or Delegate Guide

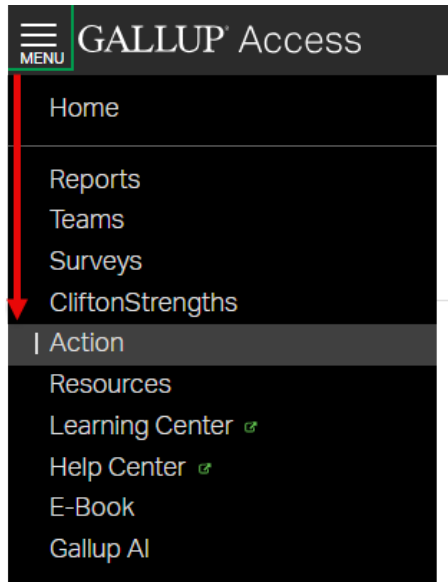
Where the engagement survey is a snapshot of your team's state once a year, action planning is key to creating an engaging environment throughout the year. Gallup Access is UCSF's trusted vendor online portal to create and track your team action plans towards successful completion.

How to monitor Engagement Action Plans submitted by your direct reports:

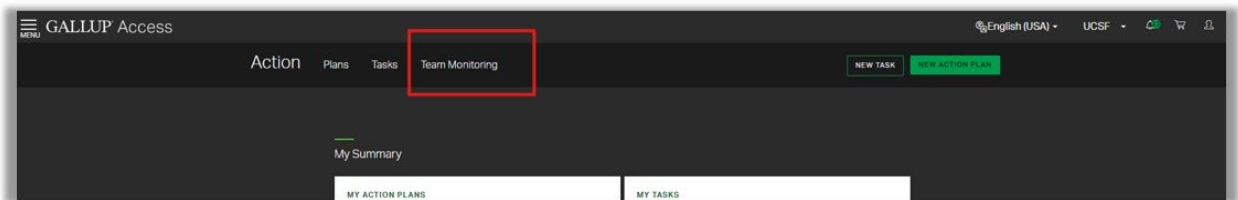
1. [Visit the Gallup Access portal](#), available via UCSF MyAccess login.
Once you arrive to the personalized homepage, click the **"Menu"** button on the top left corner.



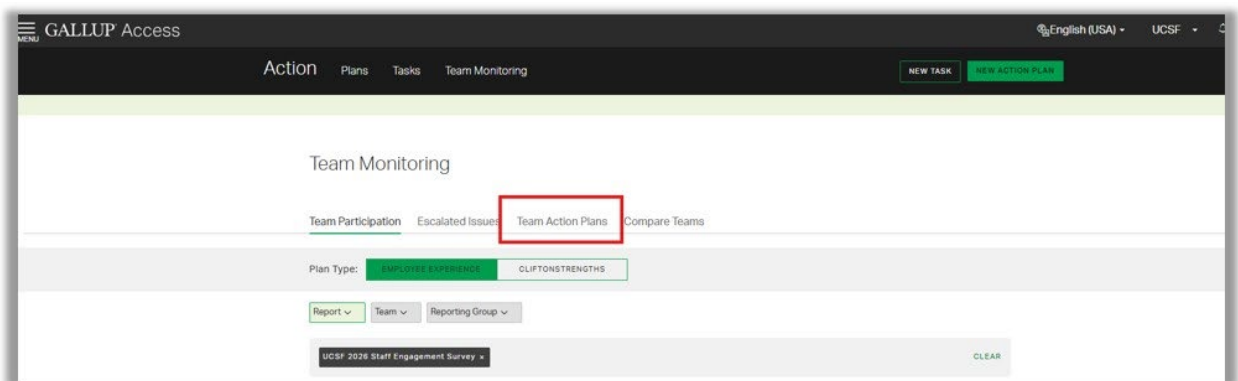
2. Select “**Action**” from the lefthand dropdown menu.



3. From the Action Planning page, select “**Team Monitoring**.”



4. From the Team Monitoring page, select the “**Team Action Plans**” tab.



Here you may review action plans submitted by leaders within your reporting hierarchy.

- a) To download an Excel file containing submitted Team Action Plans, select the “**Export**” button at the far right.

The screenshot shows a web interface for 'Team Monitoring'. At the top, there's a dark navigation bar with 'Action', 'Plans', 'Tasks', and 'Team Monitoring' tabs. To the right are 'NEW TASK' and 'NEW ACTION PLAN' buttons. Below this is a 'Team Monitoring' header with sub-tabs: 'Team Participation', 'Escalated Issues', 'Team Action Plans' (which is active), and 'Compare Teams'. Under 'Team Action Plans', there's a section for 'Action Plans (171)'. This section includes filter buttons for 'Plan Status', 'Topics', 'Related Items', 'Report', and 'Team'. A search bar labeled 'Search Available Plans' with a magnifying glass icon is on the right. Below the filters is a dropdown menu showing 'UCSF 2026 Staff Engagement Survey' and a 'CLEAR' button. At the bottom, a table header is visible with columns: 'PLAN NAME', 'STATUS', 'PLAN ADMINISTRATOR', 'LAST UPDATED', and 'DUE DATE'. The 'EXPORT' button in the top right of the 'Action Plans' section is highlighted with a red rectangle.

More support for creating action plans, connecting your survey results to your action plans, or meeting action plan goal completion is available on our [UCSF Engagement Action Planning webpage](#).

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