Learning & Organization Development at UCSF

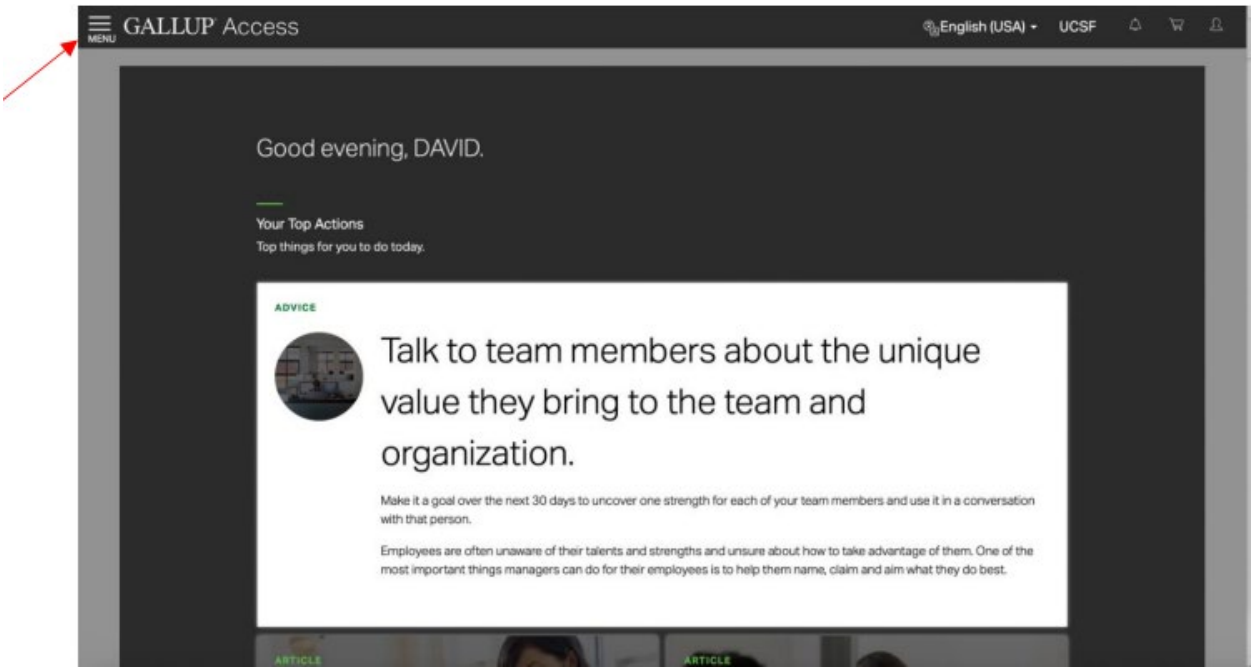
Entering your team Engagement Action Plan into Gallup Access

UCSF Engagement Manager or Delegate Guide

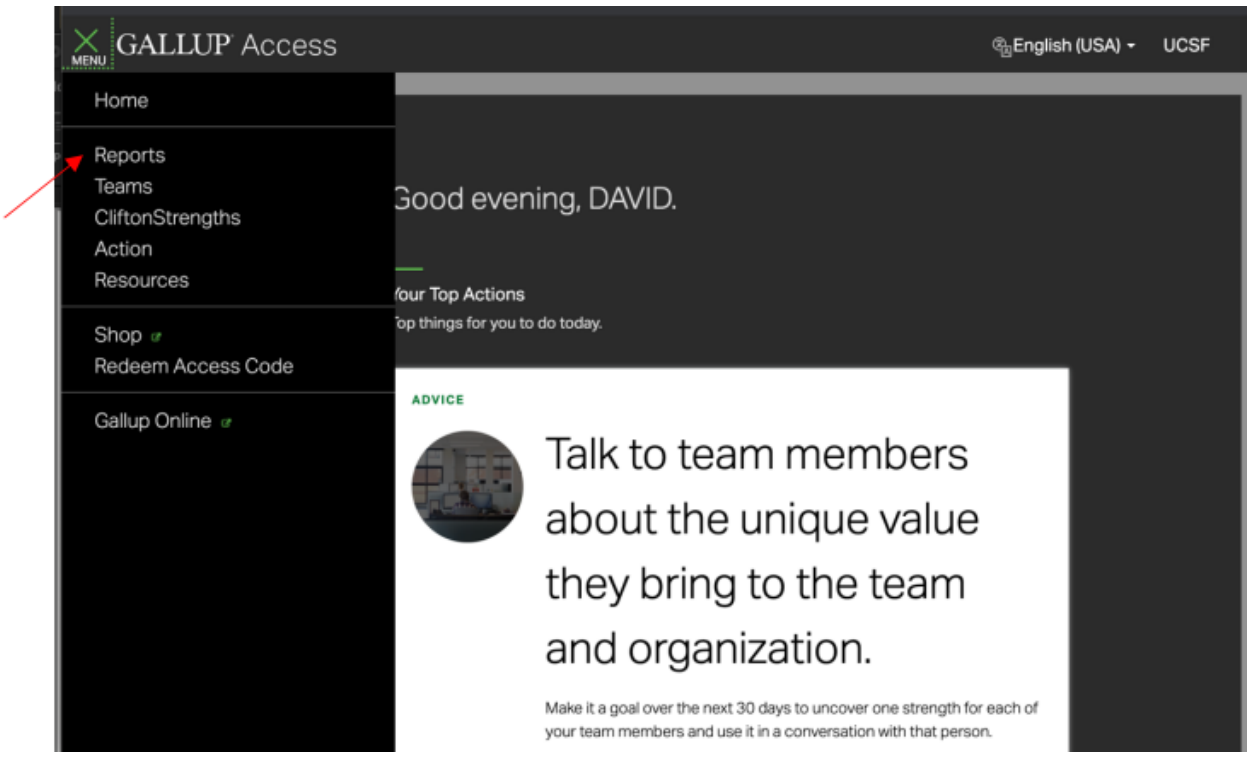
Where the engagement survey is a snapshot of your team's state once a year, action planning is key to creating an engaging environment throughout the year. Gallup Access is UCSF's trusted vendor online portal to create and track your team action plans towards successful completion.

Here's how:

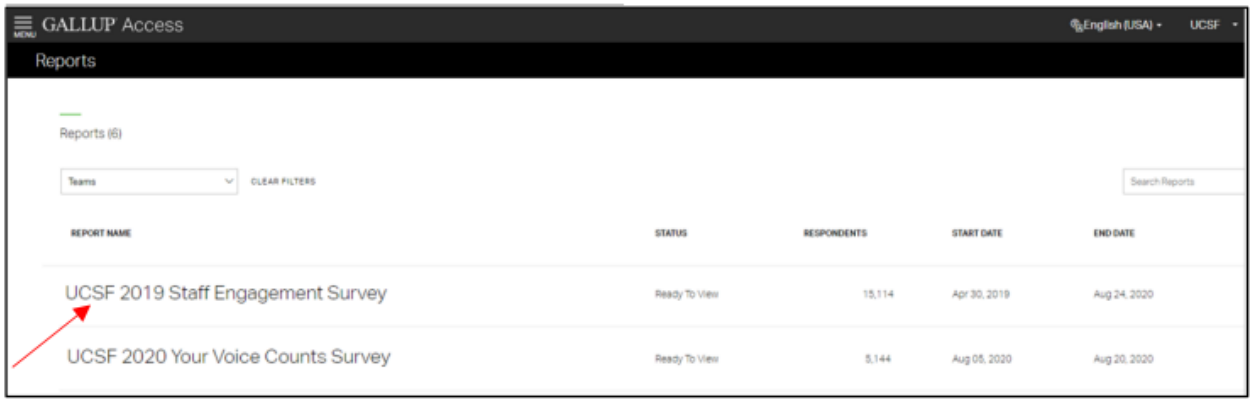
1. Visit the Gallup Access portal, available via UCSF MyAccess login.
   Once you arrive to the personalized homepage, click the "**Menu**" button on the top left corner.



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

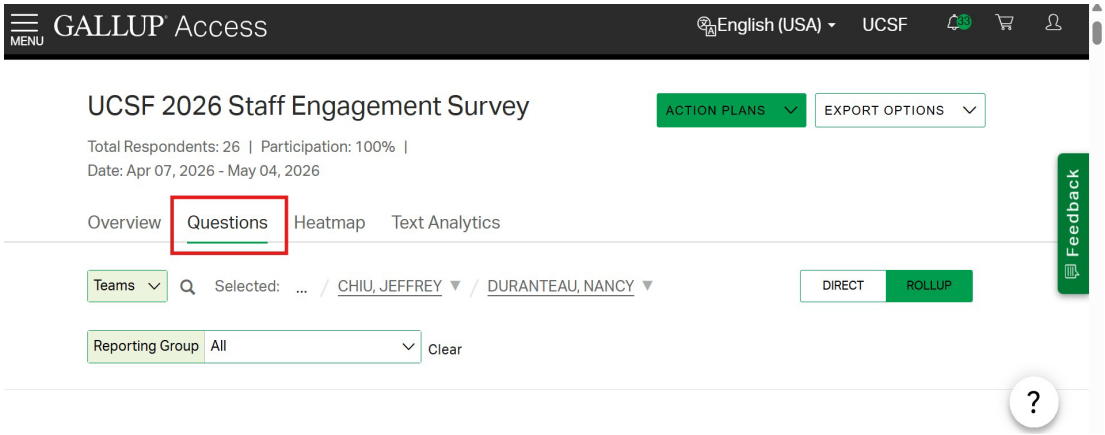


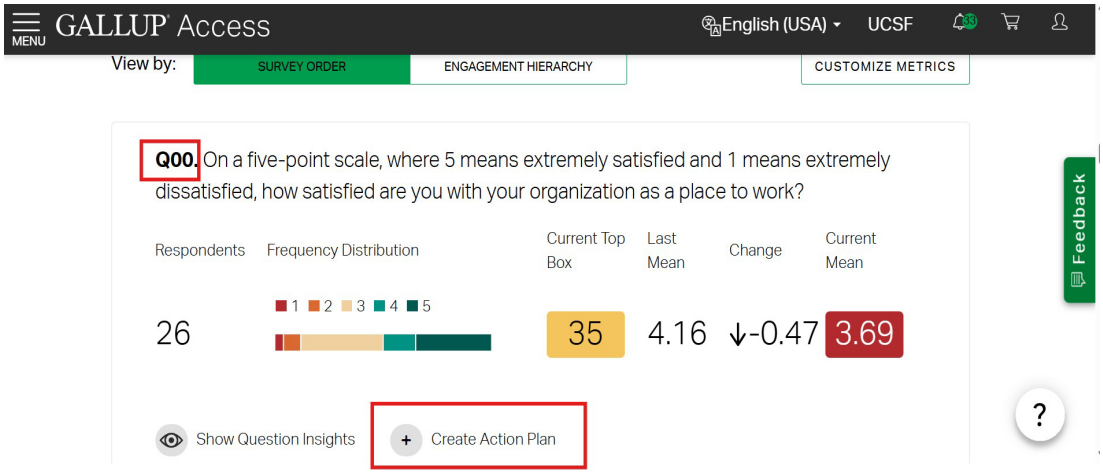
3. Select the survey you wish to view, such as **“UCSF 2026 Staff Engagement Survey.”**



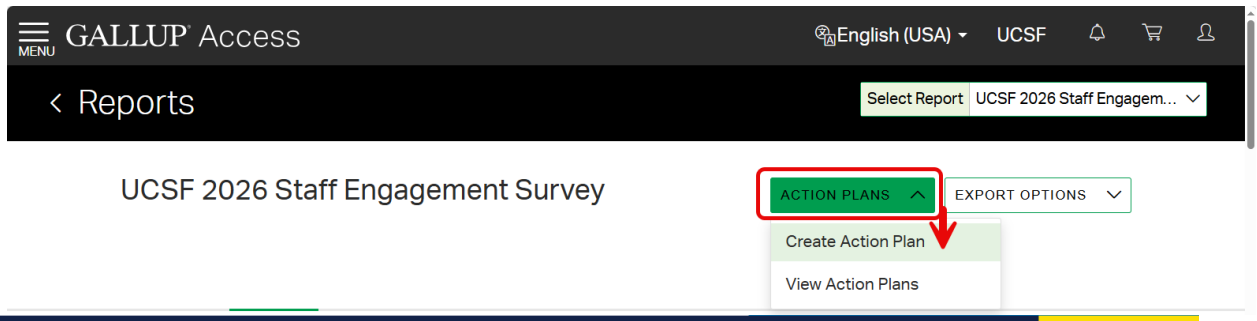
4.

a) **If you have engagement survey results for your team**, we recommend your action planning focuses on questions from your results by selecting the "**Questions**" tab, scrolling down to the question you wish to address in your action planning work, then selecting the "**+ Create Action Plan**" button underneath it.





b) **If you do not have engagement survey results for your team**, select the "**Action Plans**" button on top right and choose "**Create Action Plan**" from the dropdown menu.



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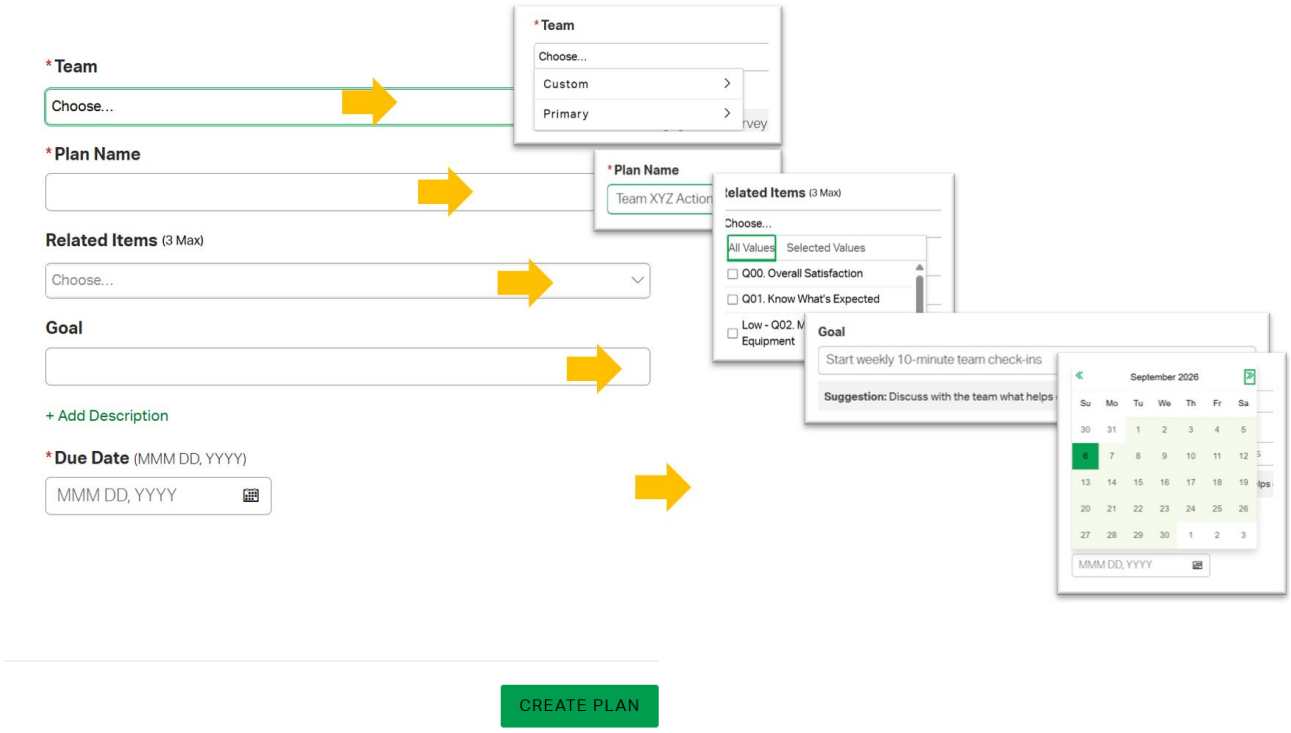
5. Follow the fill-in prompts with your:
    - **team**'s information (required)
    - **plan name** (required)
    - **related items**
    - **goal**(s)
    - **description**
    - **due date** (required)

    Finally, select the "**Create plan**" button at the bottom.



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