

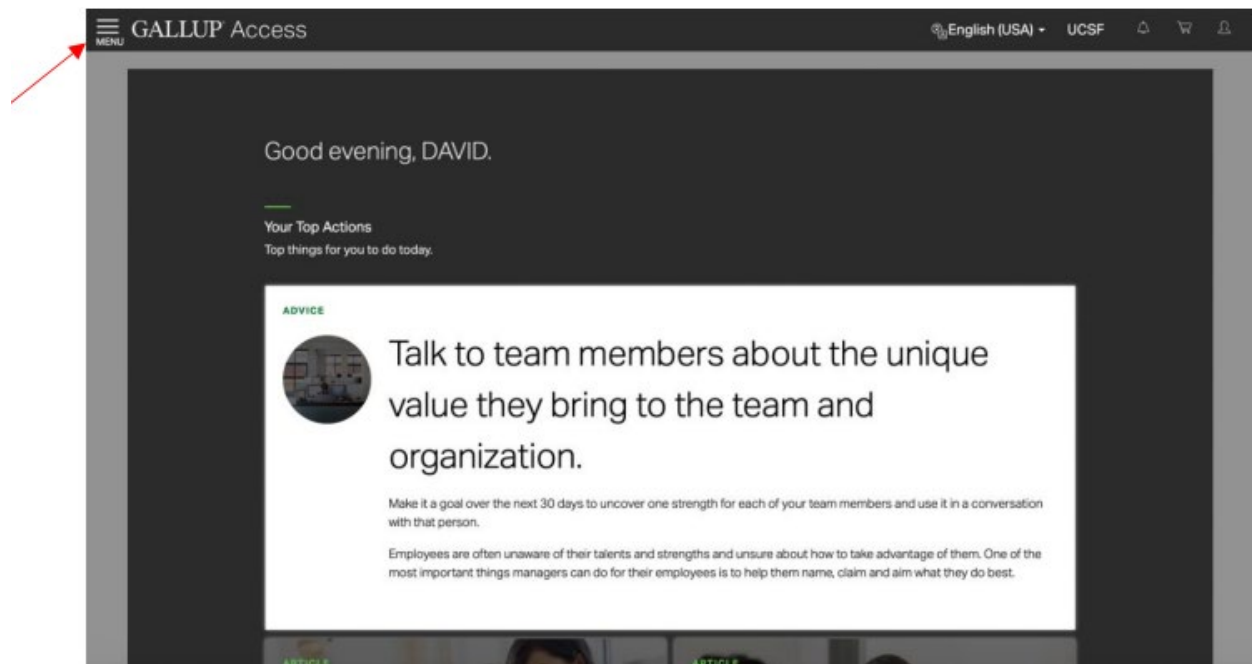
Entering your team Engagement Action Plan into Gallup Access

UCSF Engagement Manager Guide

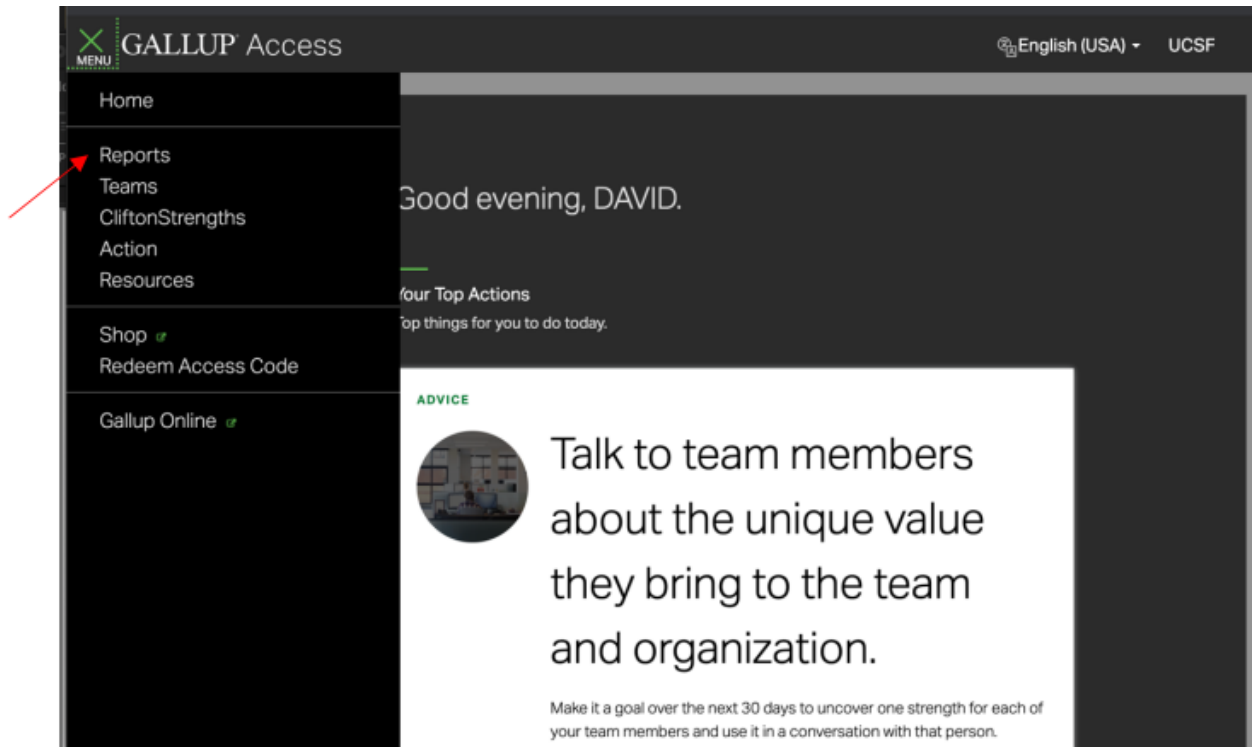
Where the engagement survey is a snapshot of your team's state once a year, action planning is key to creating an engaging environment throughout the year. Gallup Access is UCSF's trusted vendor online portal to create and track your team action plans towards successful completion.

Here's how:

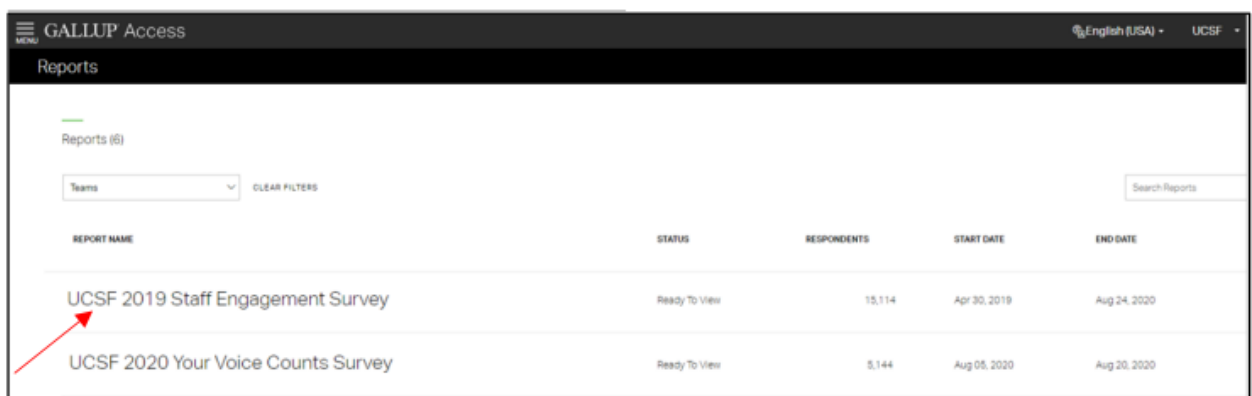
1. [Visit the Gallup Access portal](#), available via UCSF MyAccess login. Once you arrive to the personalized homepage, click the **"Menu"** button on the top left corner.



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.

GALLUP Access English (USA) UCSF

UCSF 2026 Staff Engagement Survey

Total Respondents: 26 | Participation: 100% | Date: Apr 07, 2026 - May 04, 2026

Overview **Questions** Heatmap Text Analytics

Teams Selected: ... / CHIU, JEFFREY / DURANTEAU, NANCY

Reporting Group All Clear

Feedback

GALLUP Access English (USA) UCSF

View by: SURVEY ORDER ENGAGEMENT HIERARCHY CUSTOMIZE METRICS

Q00. On a five-point scale, where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with your organization as a place to work?

Respondents	Frequency Distribution	Current Top Box	Last Mean	Change	Current Mean
26		35	4.16	↓-0.47	3.69

Show Question Insights **+ Create Action Plan**

Feedback

- 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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< Reports Select Report UCSF 2026 Staff Engagem...

UCSF 2026 Staff Engagement Survey

ACTION PLANS EXPORT OPTIONS

- Create Action Plan
- View Action Plans

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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.

The image shows a 'Create Plan' form with several fields and callouts. The fields are: '* Team' (dropdown menu), '* Plan Name' (text input), 'Related Items (3 Max)' (dropdown menu), 'Goal' (text input), '+ Add Description' (text input), and '* Due Date (MMM DD, YYYY)' (calendar picker). The callouts show: '* Team' dropdown with options 'Choose...', 'Custom', and 'Primary'; '* Plan Name' with 'Team XYZ Action'; 'Related Items (3 Max)' with 'All Values' and 'Selected Values' options, and checkboxes for 'Q00. Overall Satisfaction', 'Q01. Know What's Expected', and 'Low - Q02. M Equipment'; 'Goal' with the text 'Start weekly 10-minute team check-ins' and a suggestion 'Suggestion: Discuss with the team what helps'; and a calendar for 'September 2026' with the 6th highlighted. A green 'CREATE PLAN' button is 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](#).

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