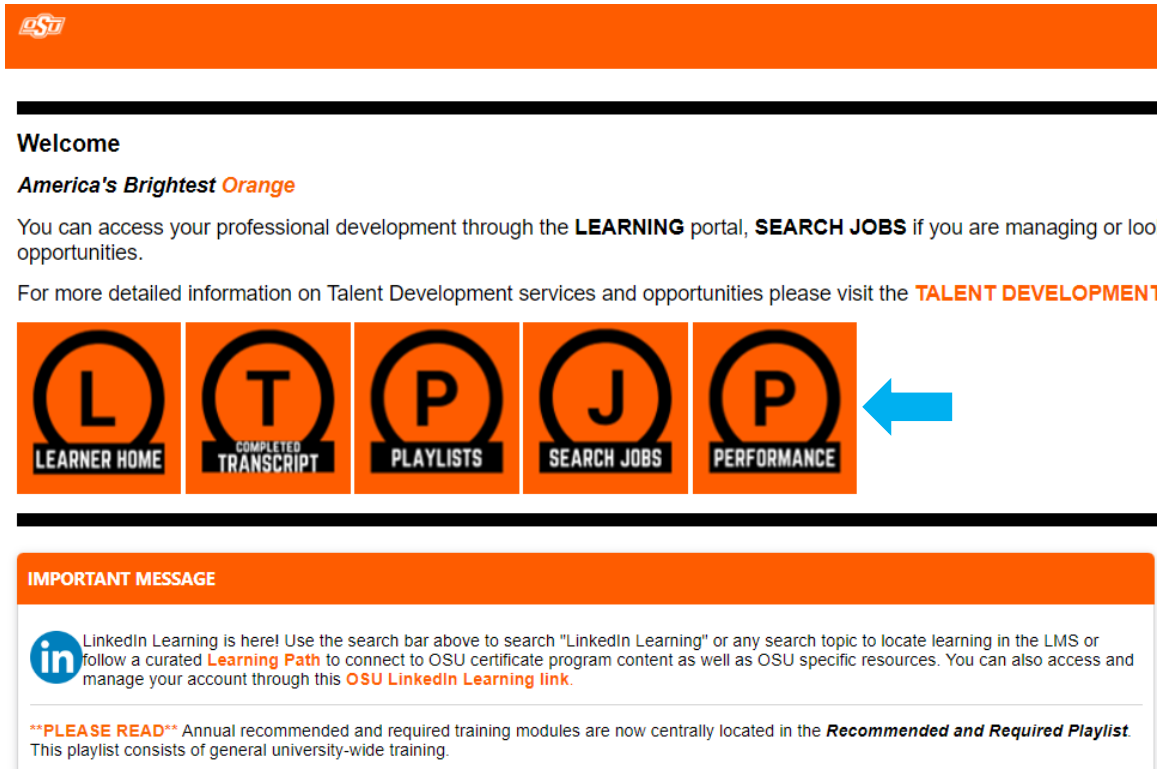


## User Guide Performance Management – Manager

To start a performance review for your staff, log into <http://talent.okstate.edu> using your O-key Credentials.

Step 1. From the home screen select Performance. From the dropdown click on **Performance Reviews** and then select **Launch Review**.



The screenshot shows the OSU Talent Development portal home screen. At the top is the OSU logo. Below it is a "Welcome" section with the tagline "America's Brightest Orange". The main content area features five circular icons: "LEARNER HOME", "COMPLETED TRANSCRIPT", "PLAYLISTS", "SEARCH JOBS", and "PERFORMANCE". A blue arrow points to the "PERFORMANCE" icon. Below the icons is an "IMPORTANT MESSAGE" section with a LinkedIn logo and text about LinkedIn Learning. At the bottom of the message is a note about training modules.

**Welcome**


*America's Brightest Orange*

You can access your professional development through the **LEARNING** portal, **SEARCH JOBS** if you are managing or look opportunities.

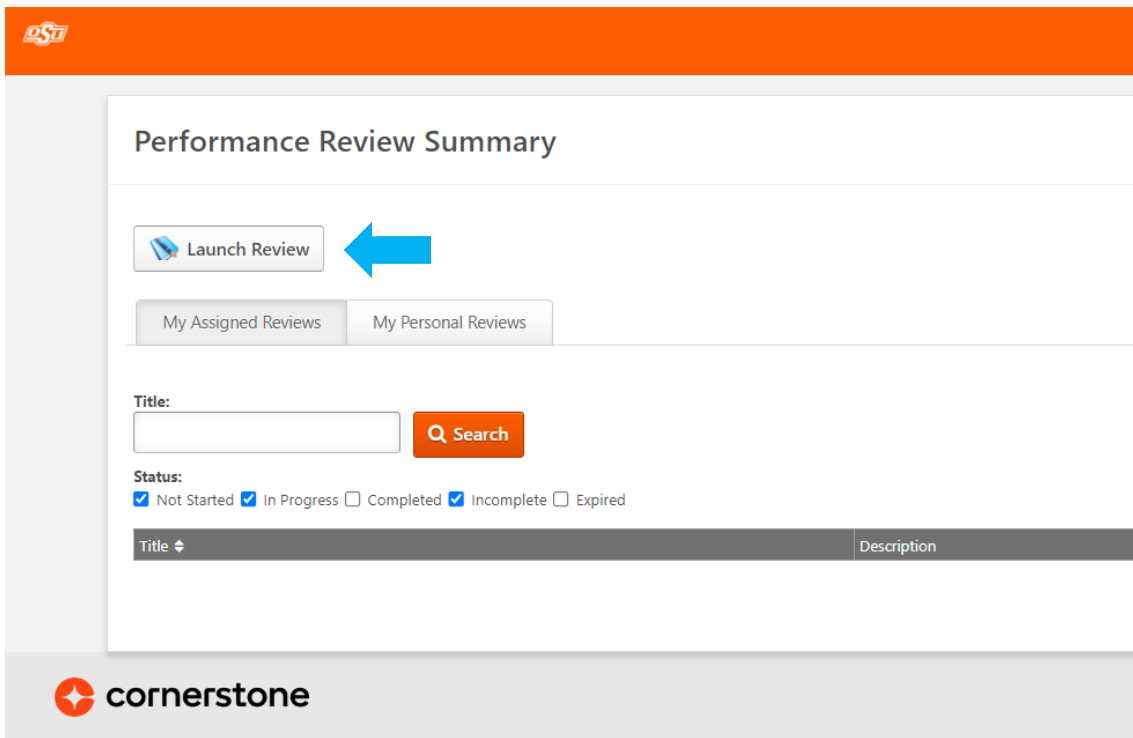
For more detailed information on Talent Development services and opportunities please visit the **TALENT DEVELOPMENT**

**L** LEARNER HOME   **T** COMPLETED TRANSCRIPT   **P** PLAYLISTS   **J** SEARCH JOBS   **P** PERFORMANCE

**IMPORTANT MESSAGE**


 LinkedIn Learning is here! Use the search bar above to search "LinkedIn Learning" or any search topic to locate learning in the LMS or follow a curated **Learning Path** to connect to OSU certificate program content as well as OSU specific resources. You can also access and manage your account through this **OSU LinkedIn Learning link**.

**\*\*PLEASE READ\*\*** Annual recommended and required training modules are now centrally located in the **Recommended and Required Playlist**. This playlist consists of general university-wide training.




The screenshot shows the "Performance Review Summary" page. It features a "Launch Review" button with a blue arrow pointing to it. Below the button are two tabs: "My Assigned Reviews" and "My Personal Reviews". There is a search bar with a "Search" button. Below the search bar are status filters: "Not Started", "In Progress", "Completed", "Incomplete", and "Expired". At the bottom, there is a table header with "Title" and "Description" columns. The Cornerstone logo is at the bottom left.

**Performance Review Summary**


 Launch Review

My Assigned Reviews   My Personal Reviews

Title:   Search

Status:  Not Started  In Progress  Completed  Incomplete  Expired

Title	Description
-------	-------------

 **cornerstone**

Step 2. Select the employee to be reviewed. Click in the user field to select the employee. You may search by name or CWID.

**Launch Performance Review**

Who is this review for?  Me  Someone else

Which review form would you like to use?

Cancel

**Select User** X

Search is limited to 1000 records only

Last Name	First Name	ID	User Name	Manager's Last Name
talent				

Q Search

Name	User ID	User Name	Manager
Talent Development, OSU	05152019	osutrng	Morris, Shelby

(1 Result)

Cancel

Step 3. Select the review you want to use.

### Launch Performance Review

Who is this review for?


Me

Someone else

Talent Development, OSU ✕

Which review form would you like to use?

📄



Cancel

### Launch Performance Review

Who is this review for?

Which review form would you like to use?

Review Form:  🔍 Search

Review Form	Description
Facilities Management Performance Review	Performance review for all full time, continuous employees within Facilities Management.
General Performance Evaluation	This is the performance review for employees with no supervisory responsibilities.
General Performance Evaluation for Supervisors	This is the performance review for employees with supervisory responsibilities.

(3 Results)

Cancel

Step 4. Enter the review type (annual, 90 day, etc.) and review period, then click Launch at the bottom of the screen.

### Launch Performance Review

**Who is this review for?**  Me  Someone else Talent Development, OSU x

**Which review form would you like to use?** General Performance Evaluatic x

**Review Type (Ex. Annual, 90 days, etc.)** Annual

**Expiration Date:** 127 days

**What is the review period?** From: 7/1/2022 To: 6/30/2023

---

#### General Performance Evaluation

**Description:** This is the performance review for employees with no supervisory responsibilities.

**Workflow:**

```
graph LR; A[Key Performance Responsibilities] --> B[Self Review]; B --> C[Supervisor Review]; C --> D[Indirect Manager Review]; D --> E[Supervisor Sign]
```

Cancel Launch

Step 5. Under the tab My Assigned Reviews, you will see “Complete Manager Review of *employee name*”. Select the review you want to complete.

Performance Review Summary

Launch Review

My Assigned Reviews My Personal Reviews

Title:  Search

Status:  Not Started  In Progress  Completed  Incomplete  Expired

Title	Description	Status	Start Date	Due Date	Last Modified Date
Complete Manager Review of OSU Talent Development (Annual)	This is the performance review for employees with no supervi...	Not Started	6/14/2023	6/15/2023	6/14/2023

(1 Result)

Step 6. The Performance Review screen will show: Employee Name and percent of completed review. The left side menu will show steps to complete. Click **Get Started**.

The screenshot displays the 'General Performance Evaluation' interface. On the left, a vertical navigation menu includes 'Overview' (selected), 'Key Performance Resp...', 'Summary', 'Core Competencies', 'Accomplishments and ...', and 'Signatures'. The main content area features the OSU logo, the text 'OSU Talent Development', 'Coor HR Trng', and the period '7/1/2022 - 6/30/2023'. A large circular progress indicator shows '0%'. Below this is an 'Overview' section with several paragraphs of text explaining the review process. At the bottom right, a blue arrow points to an orange 'Get Started' button.

**General Performance Evaluation** Options ▾

**OSU Talent Development**  
Coor HR Trng  
7/1/2022 - 6/30/2023

0%

### Overview

The supervisor will begin by identifying the employee's key performance responsibilities and adding them to the performance review. The supervisor may wish to ask the employee for input regarding the key performance responsibilities. In all cases, the key performance responsibilities need to directly relate to the position description.

The employee will complete a self-review, detailing ways in which they have met the expectations regarding performance factors and key responsibilities, and ways in which they will continue to improve and grow in each area.

The supervisor will then complete their portion of the review, detailing ways in which the employee has met the expectations regarding performance factors and key responsibilities, and ways in which the employee will continue to improve and grow in each area.

The performance review will also be routed to the indirect manager for review, approval, and suggested revisions, if necessary. Once the performance review is approved and signed electronically by the indirect manager, the supervisor and employee will meet to discuss the review, progress made in performance, the employee's self-review, the supervisor review, and progress towards objectives and goals for the upcoming year. The supervisor and employee will then complete the electronic signatures. The employee has the right to make a written statement or rebuttal within ten days of the meeting to discuss the review. Such statement will be kept in the employee's personnel file.

If an employee's overall rating is below a 3.0, the supervisor must work with OSU Human Resources to take appropriate corrective action. *(Please note that the rounded overall rating is not used for performance review scores. Only the true overall rating is recorded.)* The employee should be placed on a performance improvement plan for a specific length of time, usually up to three months. The performance improvement plan will be a separate document provided to the employee. During the duration of the performance improvement plan, the supervisor should work with the employee providing feedback on a monthly (if not more frequent) basis.

Refer to the HR website for additional information (<http://hr.okstate.edu/hr/supertools>).

### Review Step Progression

- Key Performance Responsibilities Due: 6/15/2023
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

**Get Started**

Step 7. At this point you are going to enter the Key Responsibilities for the employee. When complete, click **Save and Continue** at the end of the page.

**OSU Talent Development**  
Coor HR Trng  
7/1/2022 - 6/30/2023

0%

### Key Performance Responsibilities

**Supervisors:** Please list one key performance responsibility in each comment box. After the employee has completed the self-review, the review will route back to you for further evaluation where you will be able to rate and add further comments related to the responsibility listed.

**Employees:** Please provide a rating and comments regarding your performance related to the responsibility your supervisor listed in the comment section.

**Responsibility 1**

Please comment on the rating as needed:

Rich text editor toolbar: B I U S x<sub>2</sub> x<sub>3</sub> I<sub>x</sub>, bulleted list, numbered list, indent, outdent, Font, Size, text color, background color, undo, redo, link, unlink, table, table border, table cell background color, table cell text color.

Step 8. This screen will show you when the responsibilities have been entered. Click **Submit**.

**OSU Talent Development**  
Coor HR Trng  
7/1/2022 - 6/30/2023

100%

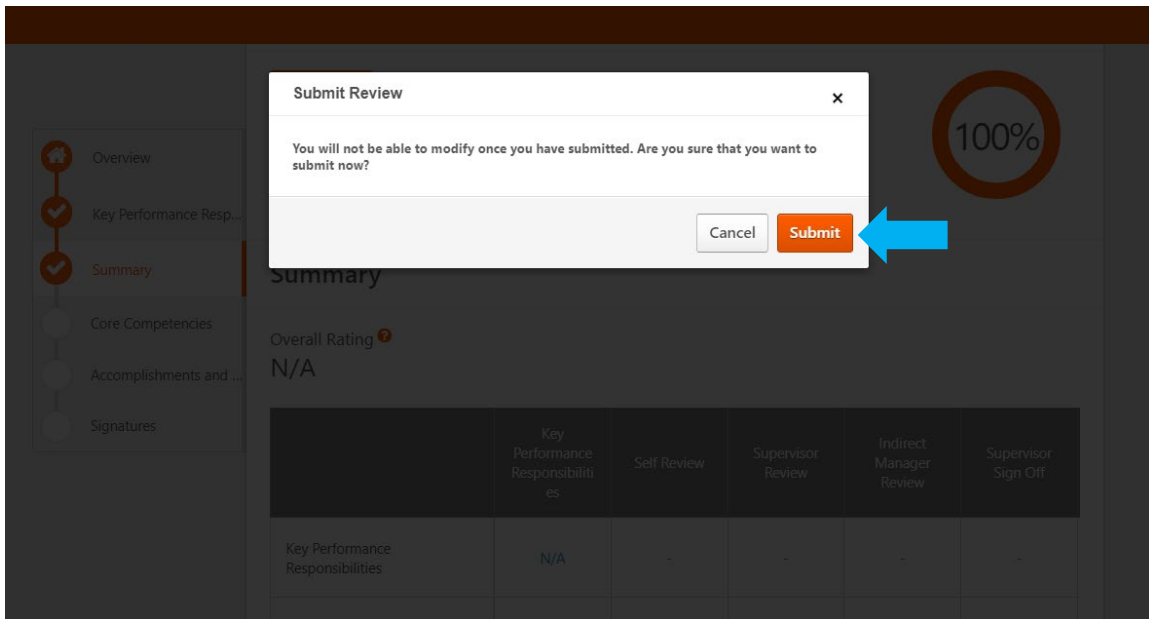
### Summary

Overall Rating <sup>?</sup>  
N/A

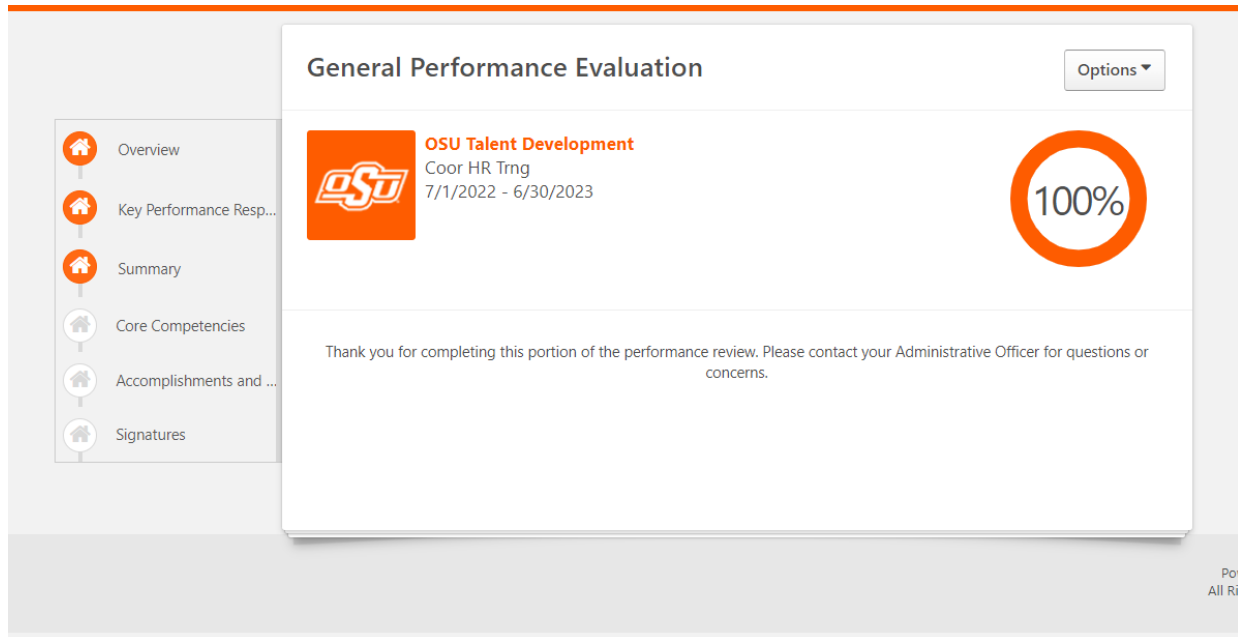
	Key Performance Responsibilities	Self Review	Supervisor Review	Indirect Manager Review	Supervisor Sign Off
Key Performance Responsibilities	N/A	-	-	-	-
Core Competencies	-	-	-	-	-
Accomplishments and Goals	-	-	-	-	-
Overall <sup>?</sup>					

Back Submit

You will see a second **Submit Review** pop up reminder. Click **Submit**.



Step 9. Once you submit, the review will route to the employee for self-review.



The review has now been sent to the employee to complete their self-evaluation. After they complete their portion of the review you will receive an email letting you know. At which point you will log into <http://talent.okstate.edu> and follow the steps on the next page of this user guide.

## Manager Review Completion Steps

Step 1. Under the My Tasks widget you will see "Complete Manager Review of *employee name*". Select the review you want to complete.

**Welcome**

*America's Brightest Orange*

You can access your professional development through the **LEARNING** portal, **SEARCH JOBS** if you are managing or looking opportunities.

For more detailed information on Talent Development services and opportunities please visit the **TALENT DEVELOPMENT** web

**L** LEARNER HOME   **T** COMPLETED TRANSCRIPT   **P** PLAYLISTS   **J** SEARCH JOBS   **P** PERFORMANCE

**IMPORTANT MESSAGE**

LinkedIn Learning is here! Use the search bar above to search "LinkedIn Learning" or any search topic to locate learning in the LMS or follow a curated **Learning Path** to connect to OSU certificate program content as well as OSU specific resources. You can also access and manage your account through this [OSU LinkedIn Learning link](#).

**\*\*PLEASE READ\*\*** Annual recommended and required training modules are now centrally located in the **Recommended and Required Playlist**. This playlist consists of general university-wide training.

Talk to your supervisor to determine which modules are right for your position and if there are additional training modules you may need.

Additionally, the Division of Agriculture has required Civil Rights trainings, please visit with your DASNR supervisor to discuss the required trainings or visit the Civil Rights playlist.

**INBOX**

[View transcript](#)  
(0 approved training selection(s))  
(Registered for 7 training selection(s))

**TASKS**

	Due Date
<a href="#">Complete Manager Review of OSU Talent Development (Annual)</a>	7/14/2023

Step 2. The home page will show that responsibilities have been entered and the self-review completed. Click **Get Started** to complete the Supervisor Review.

Refer to the HR website for additional information (<http://hr.okstate.edu/hr/supertools>).

**Review Step Progression**

- Key Performance Responsibilities
- Self Review
- Supervisor Review**  
Due: 7/14/2023
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Reopen Step   **Get Started**



Step 3. Score and comment on each section of the evaluation. On the Key Performance Responsibilities, be sure to place your comments below your previous comments where you identified the responsibilities. Click **Save and Continue** to advance through the screens.

General Performance Evaluation Options ▾

**OSU Talent Development**  
Coor HR Trng  
7/1/2022 - 6/30/2023

0%

### Key Performance Responsibilities

**Supervisors:** Please list one key performance responsibility in each comment box. After the employee has completed the self-review, the review will route back to you for further evaluation where you will be able to rate and add further comments related to the responsibility listed.

**Employees:** Please provide a rating and comments regarding your performance related to the responsibility your supervisor listed in the comment section.

**Responsibility 1**

Select ?

Please comment on the rating as needed:

Step 4. Score and comment on each section of the evaluation for the Core Competencies sections. Click **Save and Continue** to advance through the screens.

General Performance Evaluation Options ▾

**OSU Talent Development**  
Coor HR Trng  
7/1/2022 - 6/30/2023

33%

### Core Competencies

Please evaluate the employee on the following competencies.

**Professionalism**

Exhibits a courteous, conscientious and businesslike manner in the workplace. Actively endorses and supports OSU's mission and works for fulfillment of vision and goals while acknowledging the contribution of ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge. Seeks excellence in all endeavors and is committed to continuous improvement. Seeks knowledge that will provide skills that enable improved job performance.

4 - Exceeds Expec... ?

Comments :

Step 5. The Accomplishments and Goals sections are optional. If you do not wish to fill out the fields, you can click **Save and Continue**.

**General Performance Evaluation** Options ▾

**OSU Talent Development**  
 Coor HR Trng  
 7/1/2022 - 6/30/2023

67%

**Accomplishments and Goals**

Please provide details on Accomplishments and Goals.

**ACCOMPLISHMENTS:** Review progress toward goals and staff development achievements established for this evaluation period. Be sure to include any additional goals established during the course of the rating period. Discuss not only strengths and/or significant accomplishments but also difficulties and recommended actions.

Comments:

**B I U S x<sup>2</sup> | I<sub>x</sub>** Font Size A- A+

Step 6. This screen will show you the scores of each section of the evaluation. When you are ready click **Submit**. You will see a second **Submit Review** pop up reminder. When ready click **Submit**.

**General Performance Evaluation** Options ▾

**OSU Talent Development**  
 Coor HR Trng  
 7/1/2022 - 6/30/2023

100%

**Summary**

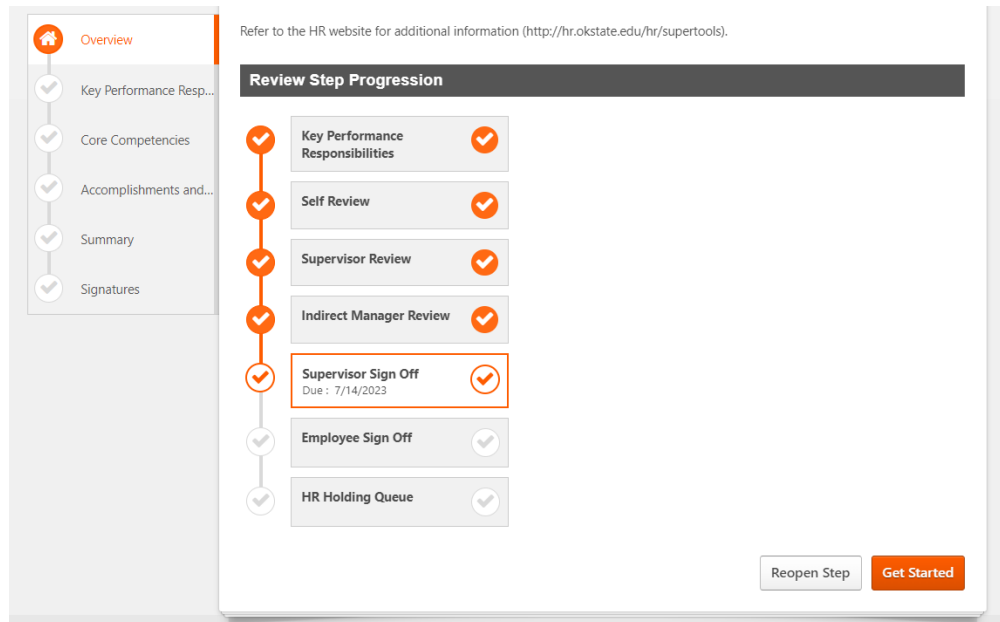
Overall Rating 🔔  
 Exceeds Expectations

	Key Performance Responsibilities	Self Review	Supervisor Review	Indirect Manager Review	Supervisor Sign Off
Key Performance Responsibilities	<b>4.3 / 5.0</b> 4 - Exceeds Expectations	<b>3.0 / 5.0</b> 3 - Meets Expectations	<b>4.3 / 5.0</b> 4 - Exceeds Expectations	-	-
Core Competencies	-	<b>3.0 / 5.0</b> 3 - Meets Expectations	<b>4.3 / 5.0</b> 4 - Exceeds Expectations	-	-
Accomplishments and Goals	-	N/A	N/A	-	-

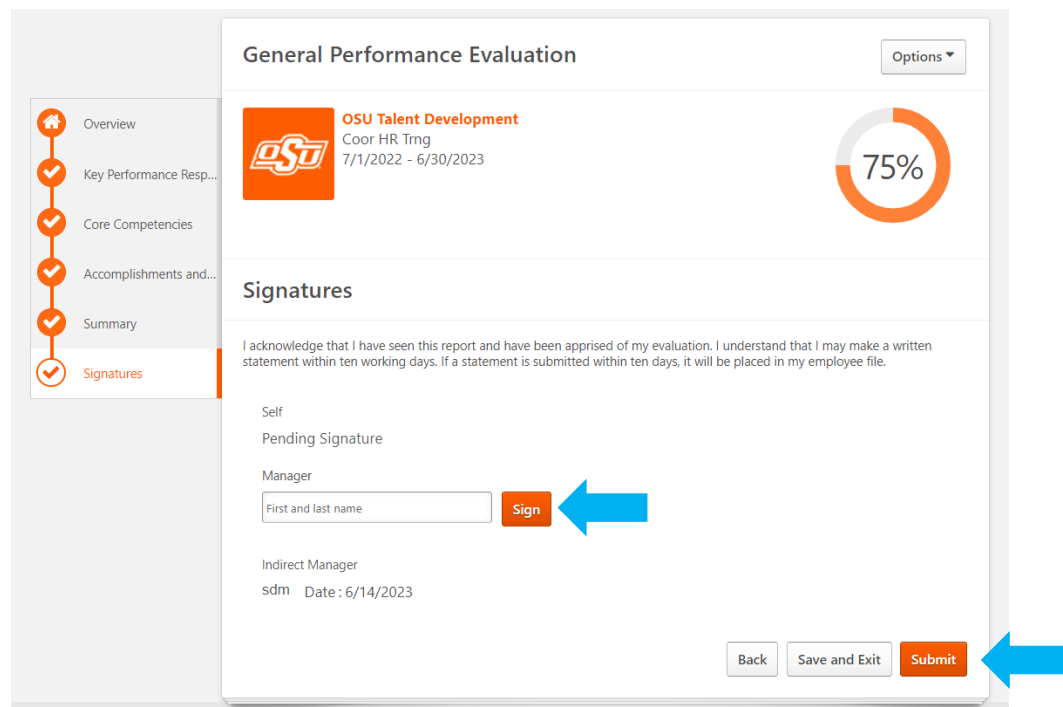
You have now completed the supervisor's portion of the review. The review has been submitted to the [indirect manager](#) for review and will then be sent back to you for a final sign-off and meeting with the employee. Continue to the Supervisor Sign Off section.

## Supervisor Sign Off

Step 1. Once logged into <http://talent.okstate.edu>, you will see the employee's performance review in your My Task widget. Select the performance review to sign and then click **Get Started**. In the summary you can verify that the indirect manager viewed the review.



Step 2. The final step in the electronic process is to sign and click **Submit**. The review is now final, and no changes can be made. You are now ready to meet with the employee for the one-on-one meeting to go over the performance review. A hard copy of the review can be printed by clicking **Options** and select **Print** from the menu.



After you have electronically signed, click **Submit** to send the review to the employee for electronic signature.