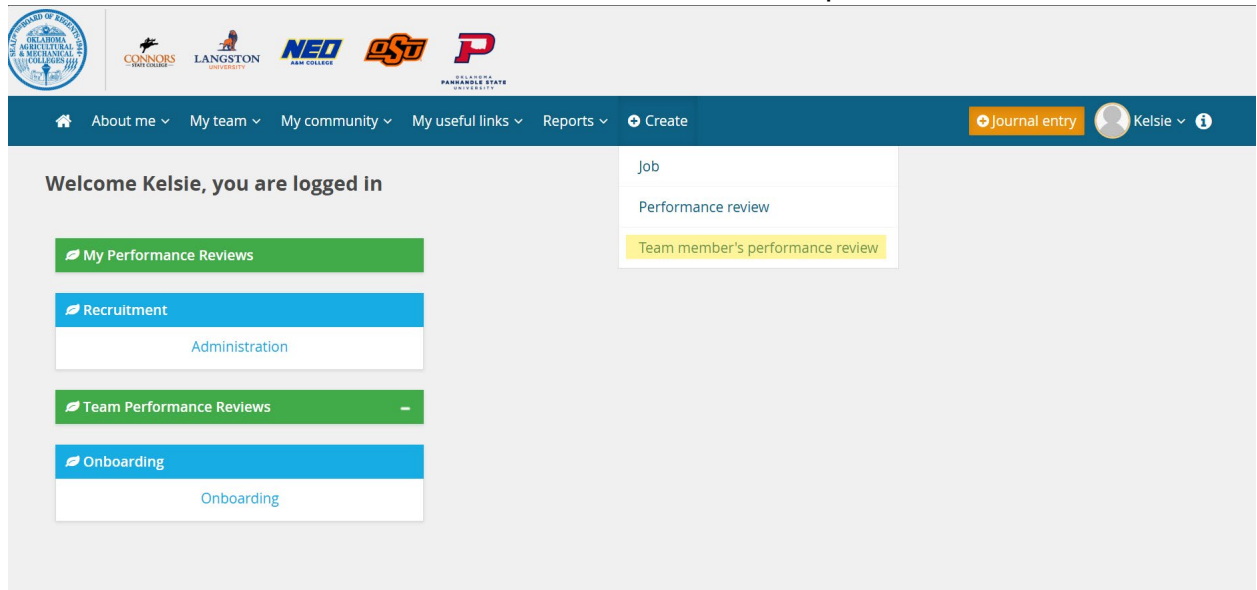


PageUp Performance User Guide

Supervisor Role, Condensed Review Process

How to Launch a Review

1. Log in to talent.okstate.edu
2. Hover over the “+Create” tab, and select “Team member’s performance review”



3. **Enter Start Date.** This date should align with when the performance review period should start, for example, July 1.
4. **In the “Review process” drop down,** select the appropriate template from the options provided, in this case the **OSU Stillwater Condensed Review Process**:
 - This is a 45-day template. UHR recommends utilizing this process for supervisors who have an established tool for performance management and need to only complete a review evaluation. Alternatively, this template may be used by those who are utilizing the full performance planning process for their employees and have an employee who has started employment toward the end of the evaluation period.
5. Search for the employee’s name using the binoculars icon. Please ensure that you select the appropriate employee by reviewing the email listed next to their name. You can use the eraser to remove a name from the employee field.
6. **Review end date:** The system automatically defaults to 45 days.
7. **Supervisor:** name should populate, but verify it is correct
8. **Higher level supervisor:** name should populate, but verify is correct
9. Always select “**Copy from Role**”
10. **Save**

11. The employee will receive an email that the review has been launched.

The screenshot shows a web interface for creating a new performance review. At the top, there is a navigation bar with links like 'About me', 'My team', 'My community', 'My useful links', 'Reports', and 'Create'. A user profile for 'Melissa' is visible on the right. The main heading is 'New: Performance review for team member'. Below this, the form includes fields for 'Review start date' (16 May 2025), 'Review process' (OSU Stillwater Condensed Evaluation Pr), 'Review end date' (Jun 30, 2025), 'Employee' (Kelsie Miner Paul), 'Manager' (Melissa Sturgeon), and '1-up manager' (Christa Louthan). There are also radio buttons for 'Copy from role' (selected) and 'Copy from an existing review'. 'Save' and 'Cancel' buttons are at the bottom right.

How to Complete the Performance Planning Phase

1. If starting the evaluation process immediately after launching, meaning job responsibilities and goals will be entered, skip to “How to Update Job Responsibilities” guide

The screenshot shows a performance review page for 'Kelsie Miner Paul - OSU Stillwater Condensed Evaluation Process'. It features a breadcrumb trail: 'Start' > 'Job Responsibilities' > 'Core Competencies' > 'Next steps'. An 'Actions' dropdown menu is in the top right. A large white box contains a welcome message: 'Welcome to the 2025-2026 Annual Performance Review Process.' followed by instructions about the 'Performance Planning' step, the deadline of May 26, 2025, and a 'Next' button. A 'Next' button with a right arrow is also at the bottom right.

1. If returning at a later time to start completing the review process, select the performance review you would like to work on by clicking the green text under the employee's name.

The dashboard features a top navigation bar with links: About me, My team, My community, My useful links, Reports, and Create. A 'Journal entry' button and a user profile for Melissa are also present. The main content area welcomes the user and displays several sections: 'My Performance Reviews', 'Team Performance Reviews' (listing Kelsie Miner Paul), a highlighted 'NEW OSU Stillwater Condensed Evaluation Process' with a progress bar for 'Performance Planning', 'Onboarding', and 'Recruitment' (listing Administration).

2. Read the **Start** tab guidance and then select the “**Next**” button to advance to the Job Responsibilities section.

This page shows the 'Start' tab selected in a breadcrumb trail: Start > Job Responsibilities > Core Competencies > Next steps. An 'Actions' dropdown menu is visible. The main content area contains a welcome message for the 2025-2026 Annual Performance Review Process, stating the user is in the 'Performance Planning' step. It provides instructions on building out sections with Kelsie's job responsibilities and core competencies, and includes a deadline of August 21, 2025. A 'Next' button with a right arrow is located at the bottom right.

How to Update Job Responsibilities

1. Read the guidance and begin by copying/pasting the job responsibilities. Please see the links and instructions on the “**Job Responsibilities**” tab to complete this task.

Kelsie Miner Paul - OSU Stillwater Condensed Evaluation Process

Start > **Job Responsibilities** > Core Competencies > Next steps

Job Responsibilities

✓ Saved Actions ▾

Supervisor Instructions:

One job responsibility has been pre-added to the page below. You can add more job responsibilities by clicking the "Add Job Responsibilities" button below. **Do not** edit the job responsibilities once the performance planning phase has completed.

Please update the item's title, measure and weight to mirror the employee's position description. The overall weight must equal 100%.

For reference, you can view the employee's position description by navigating to the [Position Description Library](#) and searching by their position number. To align the evaluation with the employee's job description, copy and paste the job responsibilities into the evaluation. If you need additional assistance identifying or updating the job responsibilities, please [reach out to your Human Resources Consultant](#).

Employee Instructions:

Your supervisor has built out at least one job responsibility below. You are welcome to review it, but **no action is required from you in this section at this time**. The job responsibilities below are populated as listed in your position description. **Do not** alter job responsibilities or their weight during this step.

Item title

Title*

Job Responsibility #1

Measure

B *I* U | | | | | | | | Source

2. To add additional job responsibilities, select the **"Add Job Responsibilities"** button. Adjust the **Weight Percentage** to align with the job description, and ensure the total is 100%.

Item title

Title*

Job Responsibility #1

Measure

B *I* U | | | | | | | | Source

Update this item with at least one (1) Job Responsibility.

Weight

%

50% of entire review

Attachment

Upload document

Add Job Responsibilities

Back

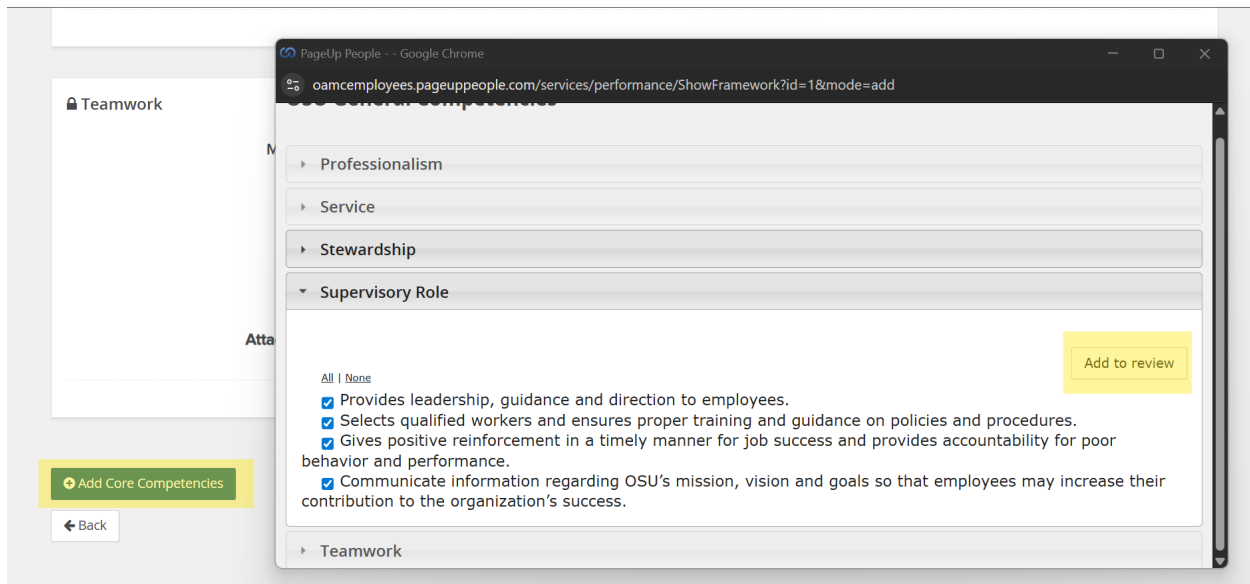
Next

3. After all responsibilities have been created and aligned with the job description, select **"Next"** to advance to the Core Competencies section.

How to Update Core Competencies

The next section moves the process to the **Core Competencies** section.

1. Review and follow guidance on the **Core Competencies** section. Four required competencies have been pre-added. If the employee is in a supervisory role, click the "Add Core Competencies" button at the bottom of the page, then select "Add to review" within the Supervisory Role to add the supervisory competency as needed.



2. After all responsibilities have been reviewed and added, push the "**Next**" button at the bottom of the page to proceed to the **Next steps** section.

A screenshot of the PageUp People interface showing the 'Supervisory Role' section. The 'Title' field is set to 'Supervisory Role'. The 'Measure' field contains a list of four competencies: 'Provides leadership, guidance and direction to employees.', 'Selects qualified workers and ensures proper training and guidance on policies and procedures.', 'Gives positive reinforcement in a timely manner for job success and provides accountability for poor behavior and performance.', and 'Communicate information regarding OSU's mission, vision and goals so that employees may increase their contribution to the organization's success.' Below the list, the 'Weight' field is set to '10% of entire review'. The 'Attachment' field has an 'Upload document' button. At the bottom of the page, there is an 'Add Core Competencies' button, a 'Back' button, and a 'Next' button.

After reviewing, select "**Acknowledge.**"

When you are satisfied with the plan, click the "I acknowledge button" below. This will advance the review into the employee's annual goal setting phase, allowing the employee access to review goals that you may have set and add their own optional goals. Once Kelsie completes their goal setting phase, you and Kelsie will review all goals.

Summary

Summary

▼ Job Responsibilities

1. Job Responsibility #1

► Core Competencies

► Goals

Your next step: Employee Sets Annual Goals

Approval

Approve Plan

Clicking "Acknowledge" will move this evaluation to the next step and you will be unable to return to this step

Melissa, as the supervisor, do you approve Kelsie's evaluation?

Acknowledge

[View entire process](#)

By pushing **"Acknowledge"**, this will move the process to the employee to complete the **Employee Self-Evaluation** step.

Employee Self-Evaluation

After the Performance Planning step, the employee will receive an email notifying them that they may launch the employee self-evaluation. This step will be available to the employee for 7 days. This can be accessed with a link in the email or through the talent.okstate.edu. The supervisor will not be able to access the evaluation during the Employee Evaluation phase.

How to Complete the Supervisor Evaluation

You will receive an email prompting you to launch the supervisor evaluation. This step will remain available to the supervisor for 7 days. This can be accessed with a link in the email or at talent.okstate.edu. Select the employee's evaluation by clicking on the green text under the employee's name, within "Team Performance Reviews."

The screenshot shows a user interface for performance reviews. At the top is a dark blue navigation bar with links: 'About me', 'My team', 'My community', 'My useful links', 'Reports', and 'Create'. On the right of this bar are a 'Journal entry' button, a user profile for 'Melissa', and an information icon. Below the navigation bar, a message says 'Welcome Melissa, you are logged in'. A sidebar on the left contains several menu items: 'My Performance Reviews' (green), 'Team Performance Reviews' (green, with a dropdown arrow), 'OSU Stillwater Condensed Evaluation Process' (yellow, with a 'NEW' tag), 'Onboarding' (blue), and 'Recruitment' (blue). The 'OSU Stillwater Condensed Evaluation Process' item is expanded, showing 'Current step: Supervisor Evaluation' and a progress bar with five circles, the third of which is filled. Below this, the 'Onboarding' and 'Recruitment' items are also expanded, showing 'Onboarding' and 'Administration' respectively.

1. After reading the overview on the Start section tab, push the “Next” button.

The screenshot shows the 'Start' tab of the performance review process. At the top, a breadcrumb navigation bar shows 'Start' (active), 'Job Responsibilities', 'Core Competencies', 'Goals', and 'Next steps'. Below this, a message says 'Last saved: Jul 22, 2025, 10:34am' and an 'Actions' dropdown menu. The main content area contains the following text: 'You are currently in the **Supervisor Evaluation** step of the performance process. Kelsie has completed their self-evaluation and you now have the opportunity to complete the supervisor portion of their review. Use this form to evaluate your employee's performance. After the evaluation is filled out, make arrangements to meet with Kelsie and discuss the performance evaluation. **Note:** Kelsie will not have access to their review while you are completing your evaluation. Click **Next** below to advance to the next tab to get started with your review.' At the bottom right, there is a yellow 'Next' button with a right arrow.

Rating **Job Responsibilities**

1. Follow the instructions as they are outlined on the **Job Responsibilities** tab. Rate each responsibility and provide a comment to justify the rating.

Job Responsibility #1

Update this item with at least one (1) Job Responsibility.

Weight: %, 50% of entire review

Kelsie Miner Paul
3 - Meets Expectations

Melissa Sturgeon
Not rated

Add comment

Link journal entry

Upload file

There are no comments for this goal.

Journal entries, documents and files can be added to accompany a responsibility.

- Link journal entries by clicking “**Link journal entry**” with the down arrow next to “**Add comment**” and selecting the journal entry you would like to link and pushing “**Link.**”
- You upload documents by clicking the down arrow next to “**Add comment**” and selecting Upload file, then pushing “**Choose File**” and selecting the file you would like to upload, then pushing “**Upload file.**”

3. Upload supplementary documents and link journal entries by using the "down arrow" by the comment button.

You can also leave final comments.

Job Responsibility #1

Update this item with at least one (1) Job Responsibility.

Weight: %, 50% of entire review

Add comment

There are no comments for this goal.

Link Journal

Search

You have no journal entries.

Link

Job Responsibility #1

Update this item with at least one (1) Job Responsibility.

Kelsie Miner Paul

3 - Meets Expectations

Melissa Sturgeon

Not rated

Weight: %, 50% of entire review

File:

Choose File No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png


Upload file

Cancel


There are no comments for this goal.

The very last rating is the summary of job responsibilities. Final comments may be left in the **“Summary: Job Responsibilities”** text box. The system automatically averages the scoring and cannot be altered by a supervisor or an employee. When finished, push the **“Next”** button to move on to rating the **Core Competencies**.







Summary: Job Responsibilities



Kelsie



Melissa

B *I* U |       Source

Kelsie Miner Paul

3 - Meets Expectations

Melissa Sturgeon

Not rated

← Back

Next →

Core Competencies

Please review the guidance on the **Core Competencies** section tab. Similar to the Job Responsibilities section, you will rate the employee on each core competency and provide a comment justifying the rating.

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.

Weight: %, 10% of entire review

Kelsie Miner Paul
4 - Exceeds Expectations

Melissa Sturgeon
5- Far Exceeds Expectations

Add comment
Link journal entry
Upload file

There are no comments for this goal.

Journal entries, documents and links can be added to accompany a core competency.

- Link journal entries by clicking **"Link journal entry"** with the down arrow next to **"Add comment"** and selecting the journal entry and pushing **"Link."**
- Upload documents by clicking the down arrow next to **"Add comment"** and selecting Upload file, then pushing **"Choose File,"** selecting the file, then pushing **"Upload file."**

You can also leave final comments at the bottom of the page. When you are done, click "Next" to advance to the next section.

Professionalism

- Exhibits a courteous, cons...
- Actively endorses and sup...
acknowledging the contrib...
rights of all to freely pursu...
- Seeks excellence in all end...
- Seeks knowledge that will...

Weight: %, 10% of entire rev...

Add comment

Link Journal

Search

You have no journal entries.

Link

There are no comments for this goal.

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.

Kelsie Miner Paul

4 - Exceeds Expectations

Melissa Sturgeon

5- Far Exceeds Expectations

Weight: %, 10% of entire review

File:

Choose File No file chosen

Description:

Accepted file types: .xls, .xlsx, .doc, .docx, .ppt, .pptx, .txt, .pdf, .rtf, .jpeg, .jpg, .png

Upload file

Cancel

There are no comments for this goal.

1. The very last rating is the summary of core competencies. Leave final comments in the **"Summary: Core Competencies"** text box. The system automatically averages the scoring, which cannot be altered by a supervisor or an employee. The weighted value of each core competency is calculated by the system and amounts to 50% of the overall evaluation. When finished, push the **"Next"** button to move on to the **Next steps** page.

Summary: Core Competencies



Kelsie



Melissa

B I U | | | | | | | | | | Source

Kelsie Miner Paul

4 - Exceeds Expectations

Melissa Sturgeon

4 - Exceeds Expectations

Back

Next

Review the guidance on the **Next steps** page, then review any final comments the employee or higher level supervisor made and leave any final supervisor comments in the Final comments text box.

Final comments

Kelsie Miner Paul
No comments made

Melissa Sturgeon

B I U | | | | | | Source

Erica Townsend
No comments made

[← Back](#)

Push **“Acknowledge”** to progress the evaluation to the higher level supervisor to review and sign-off. Please note, per policy the evaluation must be signed off by the higher level supervisor to proceed to the next step, **Employee/Supervisor Review Discussion**.

Your next step: Employee/Supervisor Review Discussion



❗ Cannot progress the evaluation to the next step

Approval

Approval is required to progress this evaluation to the next step. Please ensure you accept the objectives in this evaluation to proceed.

☒ **Notify Erica after you approve**

Melissa, as the supervisor, do you approve Kelsie's evaluation?

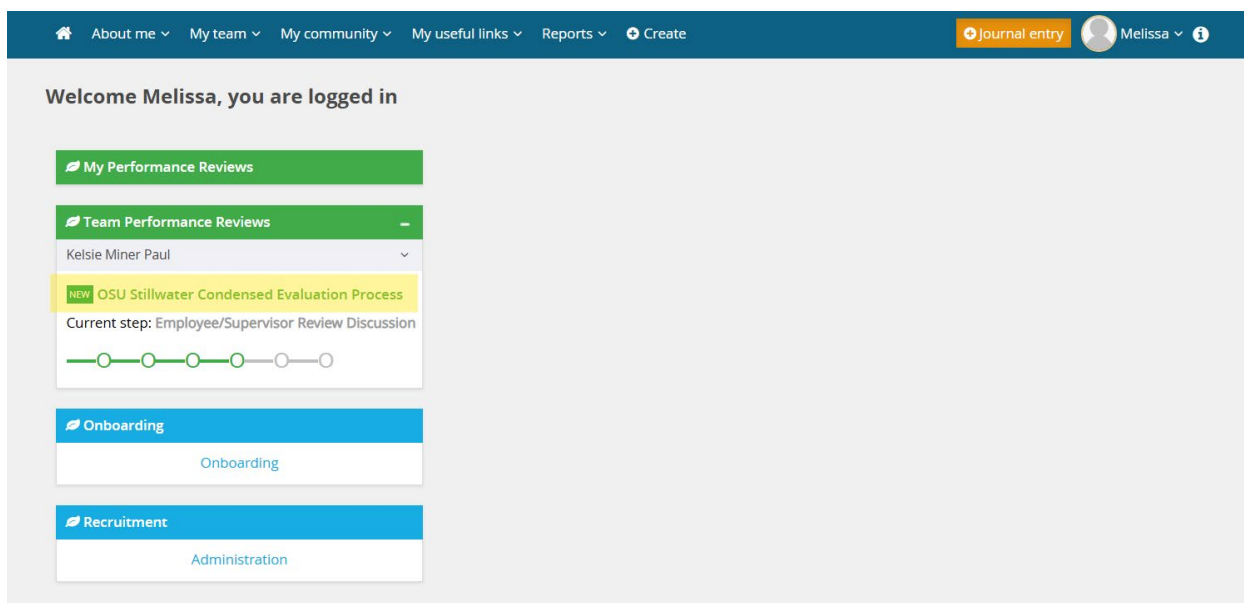
[Acknowledge](#)

Erica has not approved this evaluation

[View entire process](#)

Completing Employee/Supervisor Review Discussion

The supervisor receives an email stating that the higher level supervisor has completed their review and signed off. The Employee/Supervisor Review Discussion step may be launched at this time. This step will be available to the supervisor for 14 days. This can be accessed with a link in the email or within the review at talent.okstate.edu. Select the employee evaluation that you would like to progress by clicking on the green text under the employee's name listed under "Team Performance Reviews."



Review the guidance on the **Start** page and complete a discussion with the employee. Once the discussion has been completed, push the "**Next steps**" section tab. Review the text in the yellow box and click "**Go to next step**" to move the evaluation to the Employee Acknowledgment step. This will progress the evaluation and send an email to the employee to sign-off on the evaluation.

Start > Job Responsibilities > Core Competencies > Goals > **Next steps**

✓ **Saved** Last saved: Jul 22, 2025, 11:13am Actions

When you have completed your discussion of the evaluation results with Kelsie, click **"Go to next step"** below to move the evaluation into the Employee Acknowledgement step.

Overall rating
4.2 / 5.0
Exceeds Expectations

Rating summary

Rating summary		Melissa Sturgeon	Kelsie Miner Paul
Job Responsibilities			
1. Job Responsibility #1	4 - Exceeds Expectations	3 - Meets Expectations	

Your next step: Employee Acknowledgement

Clicking "Go to next step" will move this evaluation to the next step and you will be unable to return to this step

Go to next step

[View entire process](#)

Employee Acknowledgment

The supervisor will not have access to the evaluation during the Employee Acknowledgment step.

About me > My team > My community > My useful links > Reports > Create

Journal entry Melissa

Welcome Melissa, you are logged in

My Performance Reviews

Team Performance Reviews
Kelsie Miner Paul

NEW OSU Stillwater Condensed Evaluation Process
Current step: Employee Acknowledgement

Onboarding
[Onboarding](#)

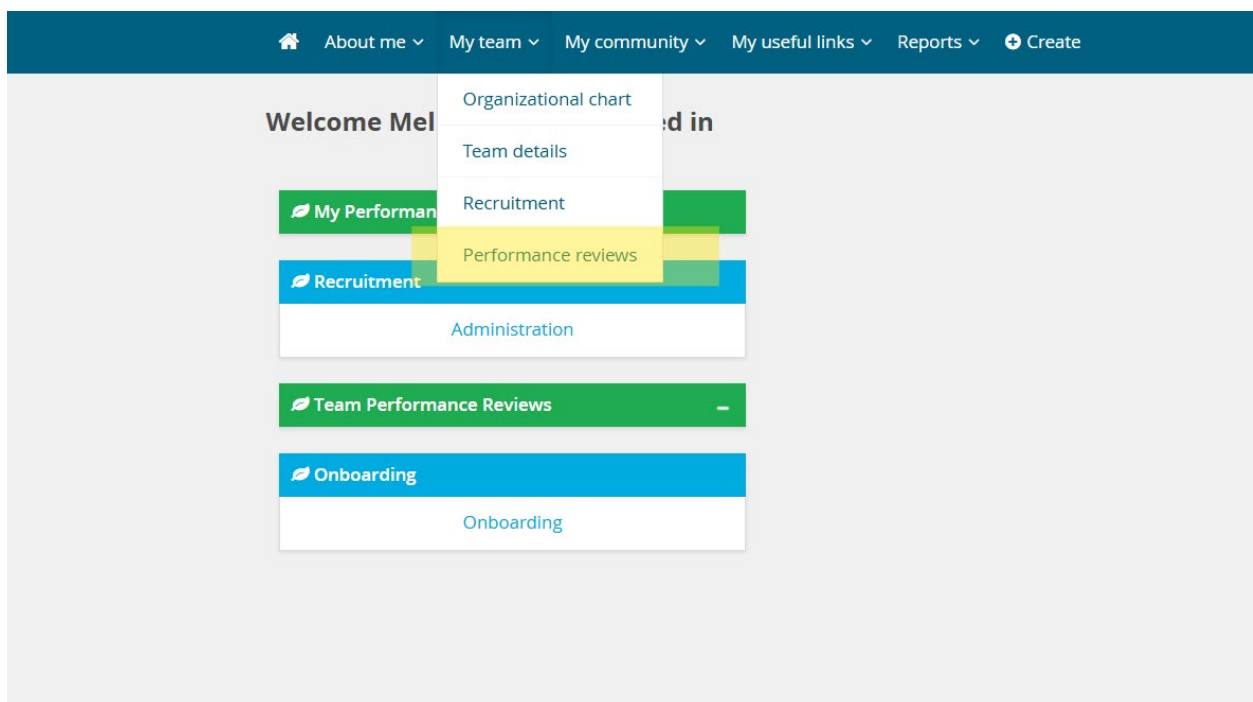
Recruitment
[Administration](#)

1. No action is required from the supervisor during this step. The employee will receive an email notifying them that their performance evaluation requires a signature within 7 days. They will log into the portal using the link in the email or by visiting talent.okstate.edu.
- Their signature will be preceded by the following statement: "I acknowledge that I have seen this report and have been apprised of my evaluation. I understand that

I may make a written statement to my supervisor within ten working days following. If a statement is submitted within ten working days, it will be attached to this evaluation report. If I choose to make a written statement below in the final comments box, I will notify my supervisor.” Written statements should be sent by the employee to the supervisor. Employee statements must be submitted within the first 10 days following the evaluation meeting.

Completing a review and accessing past reviews

1. Once the employee has signed off on their evaluation, they will no longer be able to access the evaluation from the home screen. To access completed evaluations, hover over “My Team,” and click “Performance reviews.”



2. From here, the supervisor may utilize the search features to find employee evaluations. If looking for complete evaluations, please ensure that the status is **Complete** (as shown below).

About me

My team

My community

My useful links

Reports

Create

Journal entry

Melissa

My team performance reviews

Employee first name:

Employee last name:

Clear

Search

Level:

All

Employee preferred name:

Status:

Complete

Review process step:

Select

Role:

Employee	Review process	Review step	Role	Start date	Due date
There are no items to show.					

Page 1 of 1Jump to pageRecords 0 to 0 of 0