

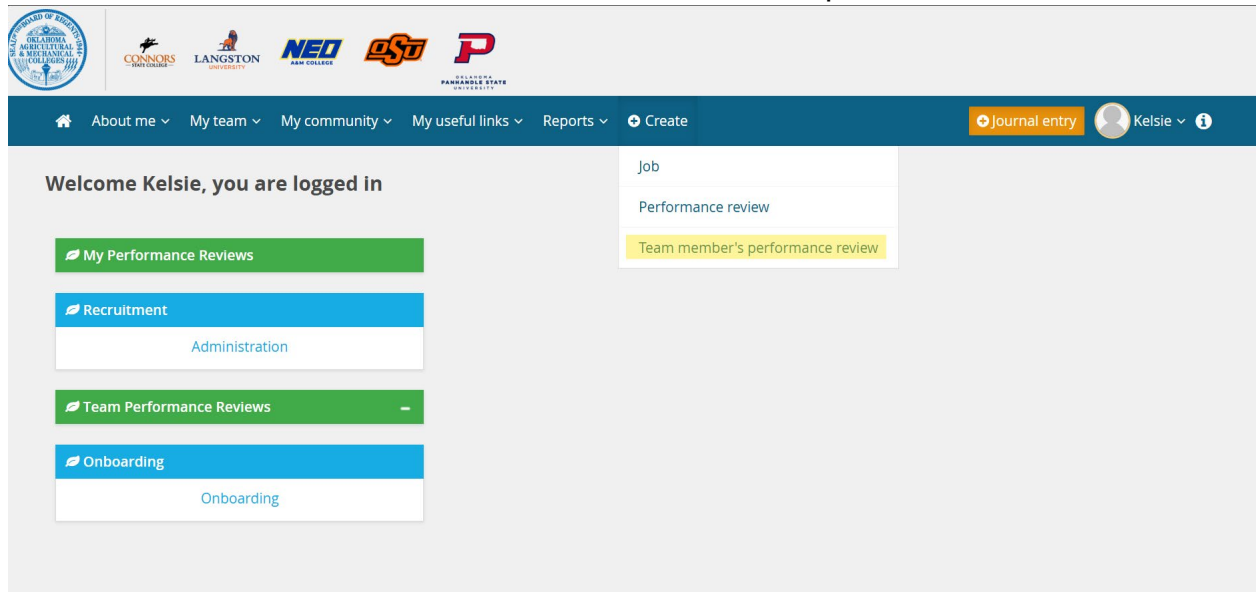


PageUp Performance User Guide

Supervisor Role, Initial Probationary Period Review

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 **Initial Probationary Period** template:
 - This is an 82-day template to assist supervisors manage performance during the probationary period following a new appointment or promotion and consists of five phases, as outlined below.
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 82 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.

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

Journal entry
 Melissa ▾

New: Performance review for team member

Review start date:*

11 Aug 2025

Review process:*

OSU Stillwater Initial Probationary Period ▾

Review end date:*

Nov 1, 2025

Employee:*

Kelsie Miner Paul

Manager:*

Melissa Sturgeon

1-up manager:

Christa Louthan

☒ Copy from role

☐ Copy from an existing review

Save

Cancel

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

Kelsie Miner Paul - OSU Stillwater Initial Probationary Period

Start

Job Responsibilities

Core Competencies

Next steps

Actions ▾

Welcome to the Initial Probationary Period performance evaluation process.

You are currently in the **Performance Planning** step of the performance process. Per [Policy 3-0706](#), all new classified staff are required to serve a three month probationary period.

[Policy 3-0741](#) outlines requirements for rating and review to determine final certification as a status employee. **This review shall be given within two to four weeks prior to the completion of three months of service.**

During this step, you will populate the subsequent sections with Kelsie's relevant job responsibilities and core competencies as a tool to track the employee's performance.

This step is open until 05 Oct 2025, and [Kelsie will not have access to the review](#) during this time.

Click **Next** below to advance to the next tab to get started.

Next →

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 screenshot shows a user dashboard for Melissa. The top navigation bar includes links for 'About me', 'My team', 'My community', 'My useful links', 'Reports', and 'Create'. A 'Journal entry' button and a user profile icon are also present. Below the navigation bar, a welcome message states 'Welcome Melissa, you are logged in'. The main content area features a sidebar with four sections: 'My Performance Reviews' (green header), 'Team Performance Reviews' (green header with a minus icon), 'Onboarding' (blue header), and 'Recruitment' (blue header). Under 'Team Performance Reviews', a dropdown menu shows 'Kelsie Miner Paul'. A highlighted green box indicates a 'NEW OSU Stillwater Initial Probationary Period' with the 'Current step: Performance Planning'. A progress bar shows five steps, with the first step being active. The 'Onboarding' section has a link to 'Onboarding', and the 'Recruitment' section has a link to 'Administration'.

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

The screenshot shows the 'Start' tab guidance for 'Kelsie Miner Paul - OSU Stillwater Initial Probationary Period'. The top navigation bar is the same as the previous screenshot. Below the navigation bar, the title 'Kelsie Miner Paul - OSU Stillwater Initial Probationary Period' is displayed. A breadcrumb trail shows 'Start' (active), 'Job Responsibilities', 'Core Competencies', and 'Next steps'. An 'Actions' dropdown menu is visible on the right. The main content area contains a welcome message: 'Welcome to the Initial Probationary Period performance evaluation process.' followed by a paragraph explaining the process: 'You are currently in the **Performance Planning** step of the performance process. Per [Policy 3-0706](#), all new classified staff are required to serve a three month probationary period. [Policy 3-0741](#) outlines requirements for rating and review to determine final certification as a status employee. **This review shall be given within two to four weeks prior to the completion of three months of service.** During this step, you will populate the subsequent sections with Kelsie's relevant job responsibilities and core competencies as a tool to track the employee's performance. This step is open until 05 Oct 2025, and Kelsie will not have access to the review during this time. Click **Next** below to advance to the next tab to get started.' A yellow '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 Initial Probationary Period

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](#) or campus HR office.

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

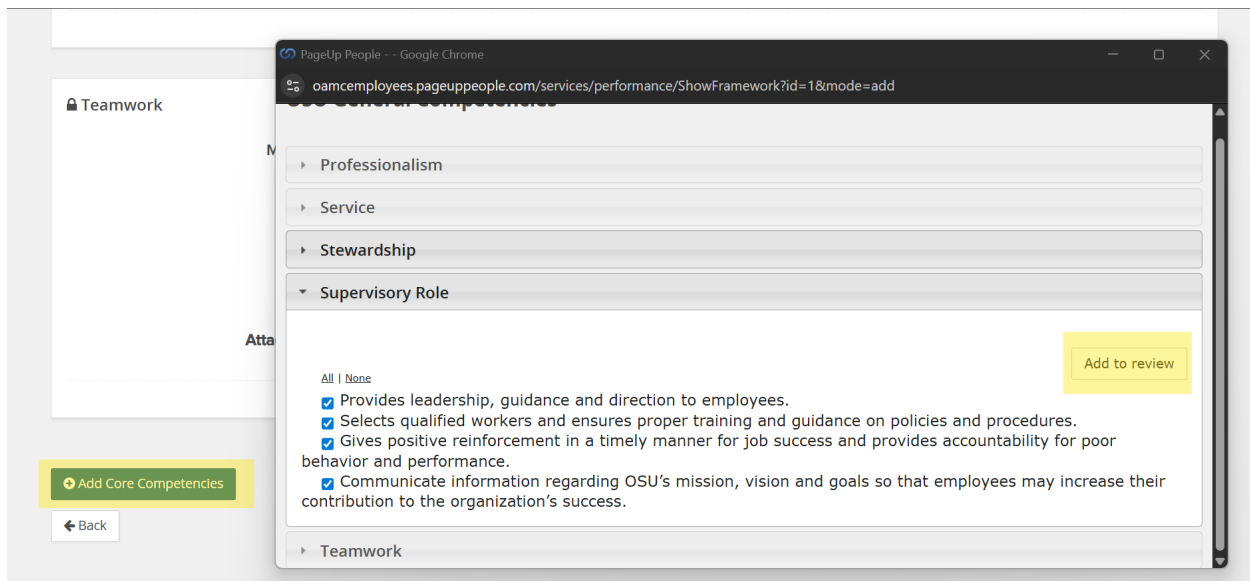
◀ Back Next ▶

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.

The screenshot shows the 'Supervisory Role' section of the PageUp People interface. The 'Title' field is set to 'Supervisory Role'. The 'Measure' field is populated with a list of 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. The 'Weight' field is set to 10% of the entire review. The 'Attachment' field has an 'Upload document' button. At the bottom, there is a blue 'Add Core Competencies' button and a yellow '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.

The screenshot displays a performance review interface. On the left, a 'Summary' panel contains a list of sections: 'Summary' (highlighted), 'Job Responsibilities' (expanded to show '1. Job Responsibility #1'), 'Core Competencies', and 'Goals'. On the right, a progress bar indicates the current step is 'Approval' (Approve Plan). Below the progress bar, a yellow callout box contains a warning icon and text: 'Clicking "Acknowledge" will move this evaluation to the next step and you will be unable to return to this step'. Below this, a question asks 'Melissa, as the supervisor, do you approve Kelsie's evaluation?' with a green 'Acknowledge' button. A link 'View entire process' is at the bottom right.

By pushing “**Acknowledge**”, this will move the process to the Supervisor Evaluation step for you to complete.

How to Complete the Supervisor Evaluation

This step will remain available to the supervisor for 10 days. You will receive an email prompting you to launch the supervisor evaluation. 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.”

Home 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 Initial Probationary Period
Current step: Supervisor Evaluation
Onboarding
Recruitment
Administration

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

Kelsie Miner Paul - OSU Stillwater Initial Probationary Period

Start Job Responsibilities Core Competencies Next steps

Last saved: Aug 11, 2025, 4:17pm Actions

You are currently in the **Supervisor Evaluation** step of the performance process.

Use this form to evaluate your employees’ accomplishments as well as their values/competencies.

After the evaluation is filled out, make arrangements to meet with Kelsie and discuss the performance evaluation.

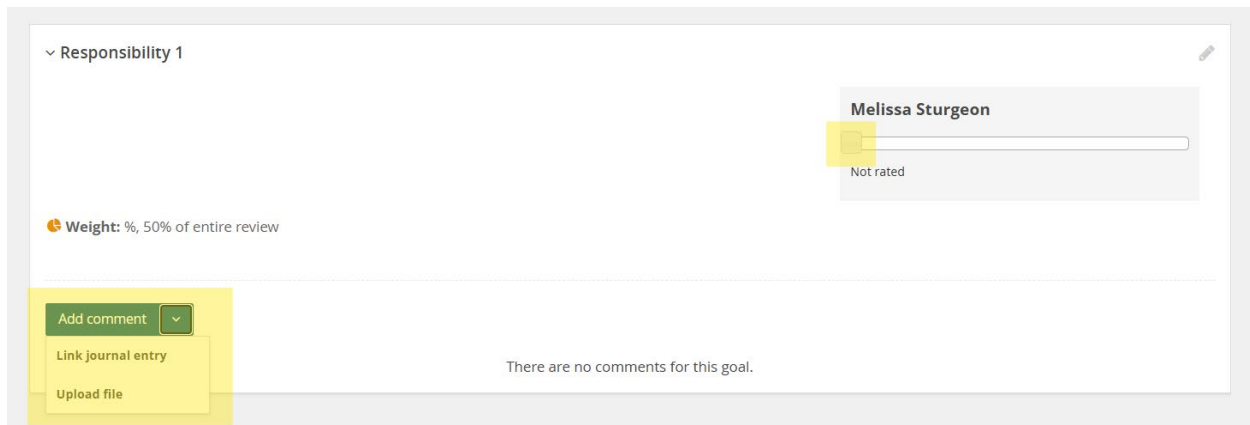
Note: Kelsie will not have access to their review while you are completing your evaluation.

Click **Next** below to advance to the next tab to get started with your review.

Next

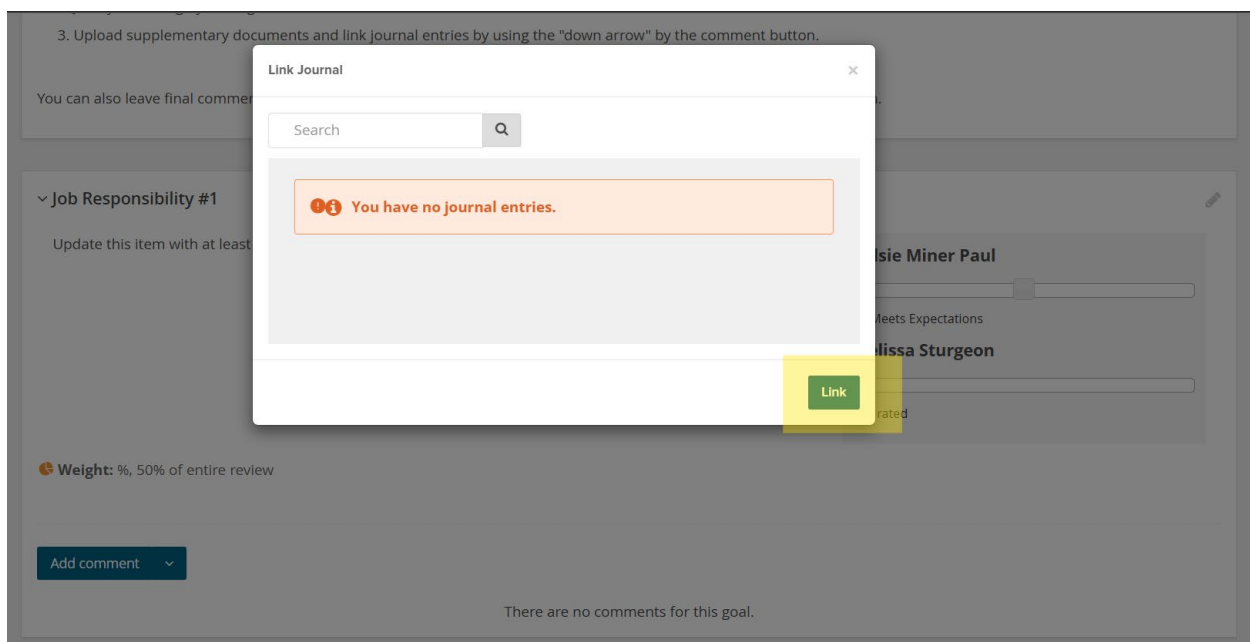
Rating **Job Responsibilities**

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



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.”**



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

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?

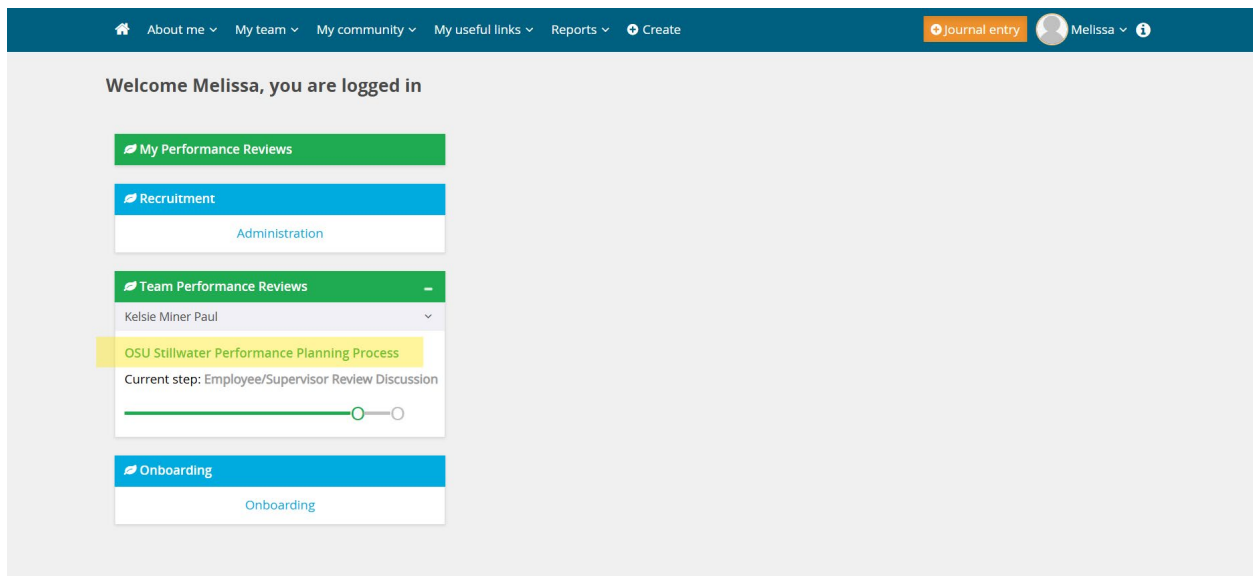
Acknowledge

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 10 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 Initial Probationary Period

Current step: Employee Acknowledgement

Onboarding

Recruitment

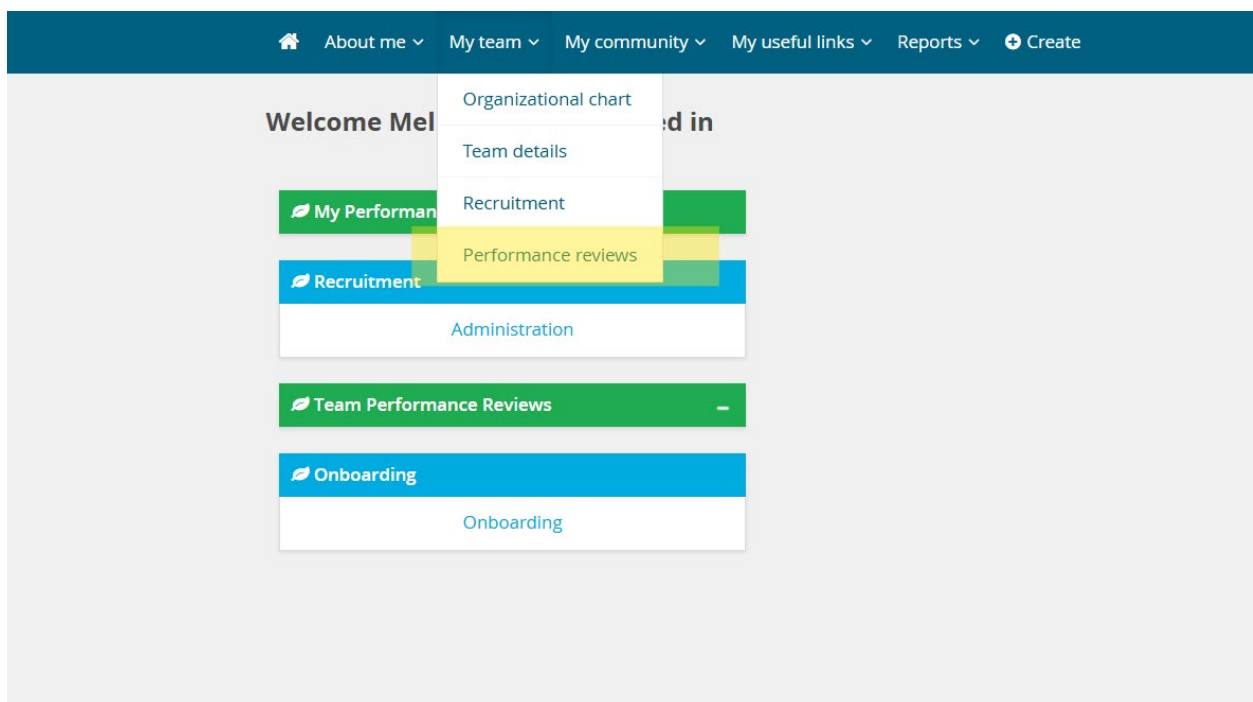
Administration

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 1

Jump to page

Records 0 to 0 of 0