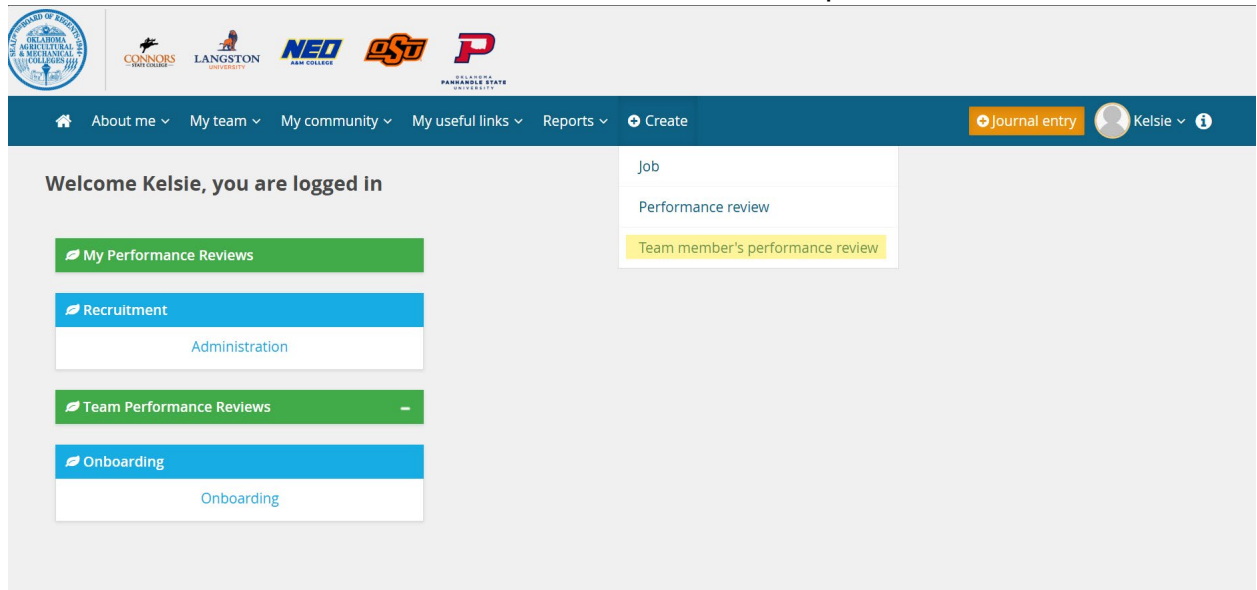


# PageUp Performance User Guide

## Supervisor Role for OSU Stillwater Evaluation: No Self Eval

### 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 **No Self Eval** template:
  - This is the same process as the condensed review process, except without a self-evaluation step for the employee. This is a 38-day template. *UHR recommends this process for supervisors who have an established tool for performance management and need to only complete an evaluation. Alternatively, this template may be used by those who are utilizing the 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 38 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 is a navigation bar with links like 'About me', 'My team', 'My community', 'My useful links', 'Reports', and 'Create'. A 'Journal entry' button and a user profile for 'Melissa' are also visible. The main heading is 'New: Performance review for team member'. Below this is a form with several fields: 'Review start date:\*' (22 May 2025), 'Review process:\*' (OSU Stillwater No Self-Evaluation), 'Review end date:\*' (Jun 29, 2025), 'Employee:\*' (Kelsie Miner Paul), 'Manager:\*' (Melissa Sturgeon), and '1-up manager:' (Christa Louthan). Each name field has a search icon and a dropdown arrow. At the bottom of the form are two radio buttons: '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 No Self-Evaluation'. It features a progress bar with four steps: 'Start' (active), 'Job Responsibilities', 'Core Competencies', and 'Next steps'. An 'Actions' dropdown menu is in the top right. The main content area has a heading 'Welcome to the 2025-2026 Annual Performance Review Process.' followed by instructions: 'You are currently in the Performance Planning step of the performance process. During this step, you will build out the subsequent sections with Kelsie's relevant job responsibilities and core competencies. This step is open until 21 Aug 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 'Next' button with a right arrow is 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 screenshot shows a user interface for a performance review system. 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 is a 'Journal entry' button and a user profile for 'Melissa'. Below the navigation bar, a message says 'Welcome Melissa, you are logged in'. The main content area has four sections: 'My Performance Reviews' (green header), 'Team Performance Reviews' (green header with a dropdown for 'Kelsie Miner Paul'), 'Onboarding' (blue header with a link to 'Onboarding'), and 'Recruitment' (blue header with a link to 'Administration'). The 'Team Performance Reviews' section is expanded, showing a review for 'OSU Stillwater No Self-Evaluation' with a progress bar indicating the 'Current step: Performance Planning'.

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 a performance review. At the top, it says 'Kelsie Miner Paul - OSU Stillwater No Self-Evaluation'. Below this is a breadcrumb navigation bar with 'Start', 'Job Responsibilities', 'Core Competencies', and 'Next steps'. The 'Start' tab is active. On the right, there is an 'Actions' dropdown menu. The main content area has a white box with the heading 'Welcome to the 2025-2026 Annual Performance Review Process.' and the following text: 'You are currently in the Performance Planning step of the performance process. During this step, you will build out the subsequent sections with Kelsie's relevant job responsibilities and core competencies. This step is open until 21 Aug 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.' At the bottom right, there is a yellow 'Next' button with a right arrow.

## 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 No Self-Evaluation**

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\*

Measure 

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

- 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\*

Measure 

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

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

Weight  % 50% of entire review

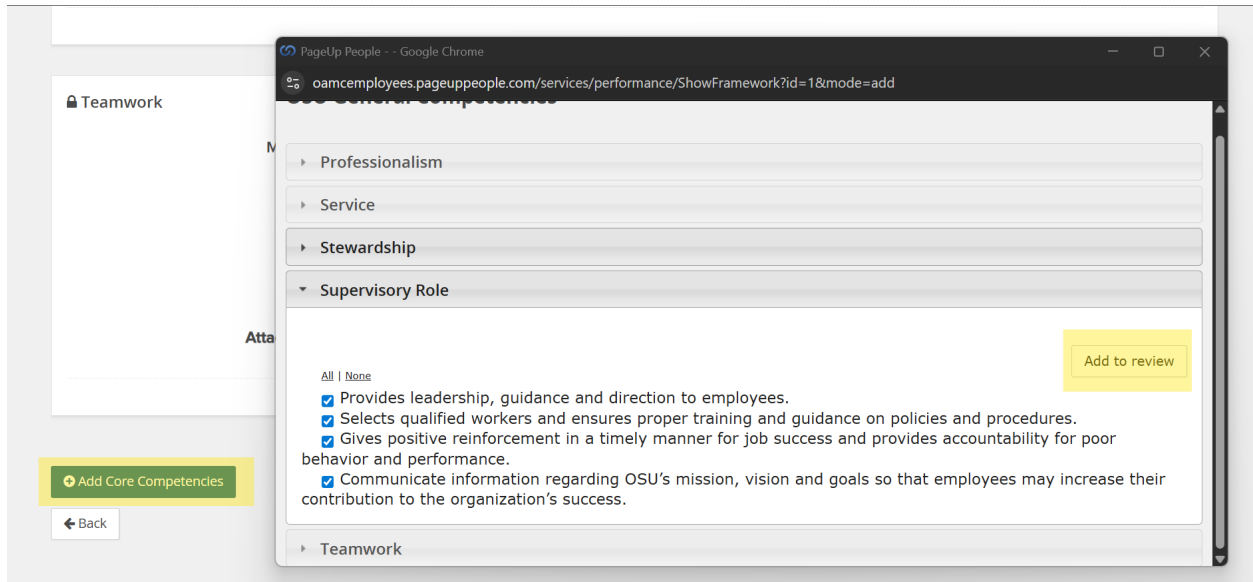
Attachment

- 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 Supervisor Evaluation step for you to complete.

## How to Complete the Supervisor Evaluation

This step will remain available to the supervisor for 7 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.”

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

Journal entryMelissa ▾

Welcome Melissa, you are logged in

My Performance Reviews

Team Performance Reviews

Kelsie Miner Paul ▾

NEW OSU Stillwater No Self-Evaluation

Current step: Supervisor Evaluation

Onboarding

Onboarding

Recruitment

Administration

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

**Kelsie Miner Paul - OSU Stillwater No Self-Evaluation**

Start > Job Responsibilities > Core Competencies > Next steps

Last saved: Aug 11, 2025, 3:52pm Actions ▾

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

Use this form to evaluate Kelsie'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.

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.

▼ Responsibility 1

Melissa Sturgeon

Not rated

🔗 Weight: %, 50% of entire review

Add comment ▾

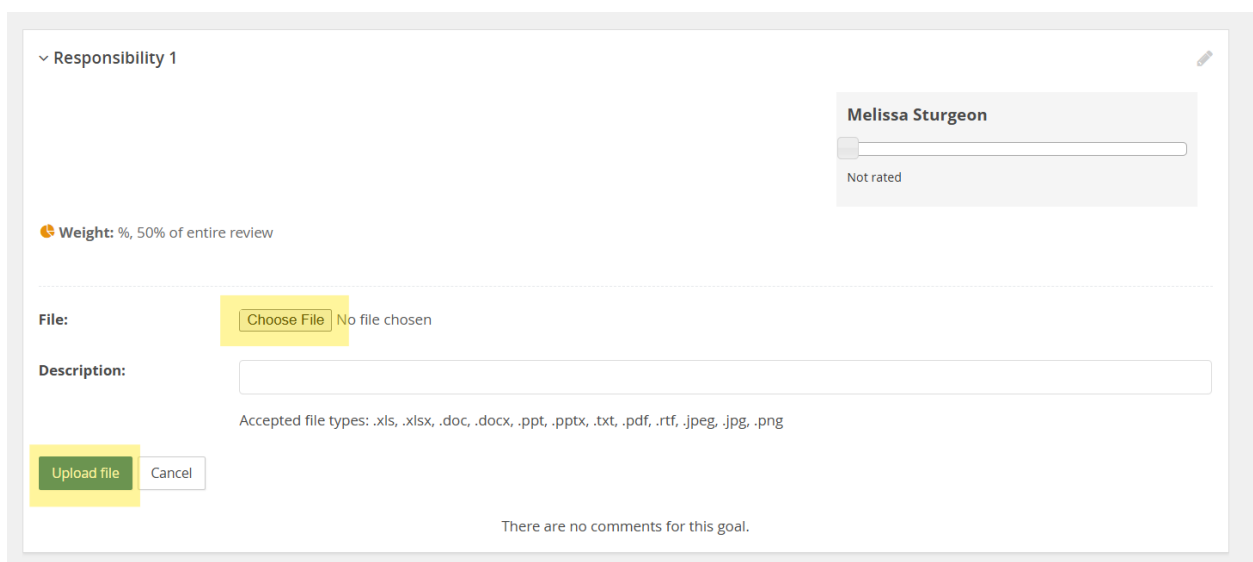
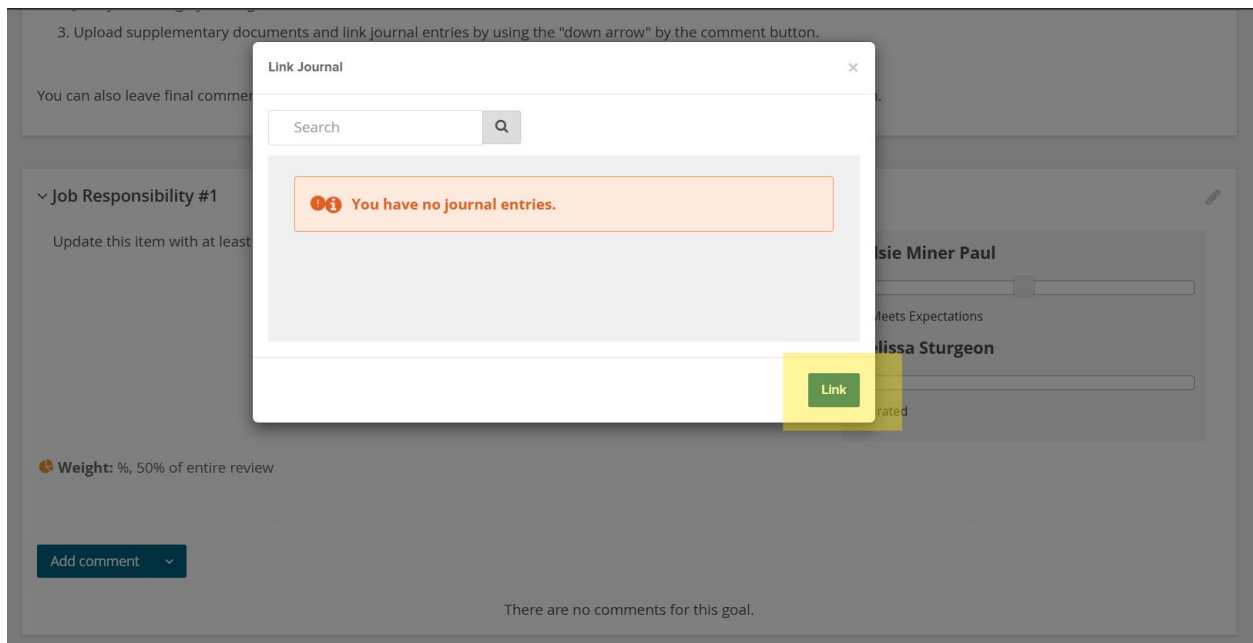
Link journal entry

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.**”



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

**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:** %, 12.5% of entire review

**Melissa Sturgeon**

Not rated

Add comment ▾

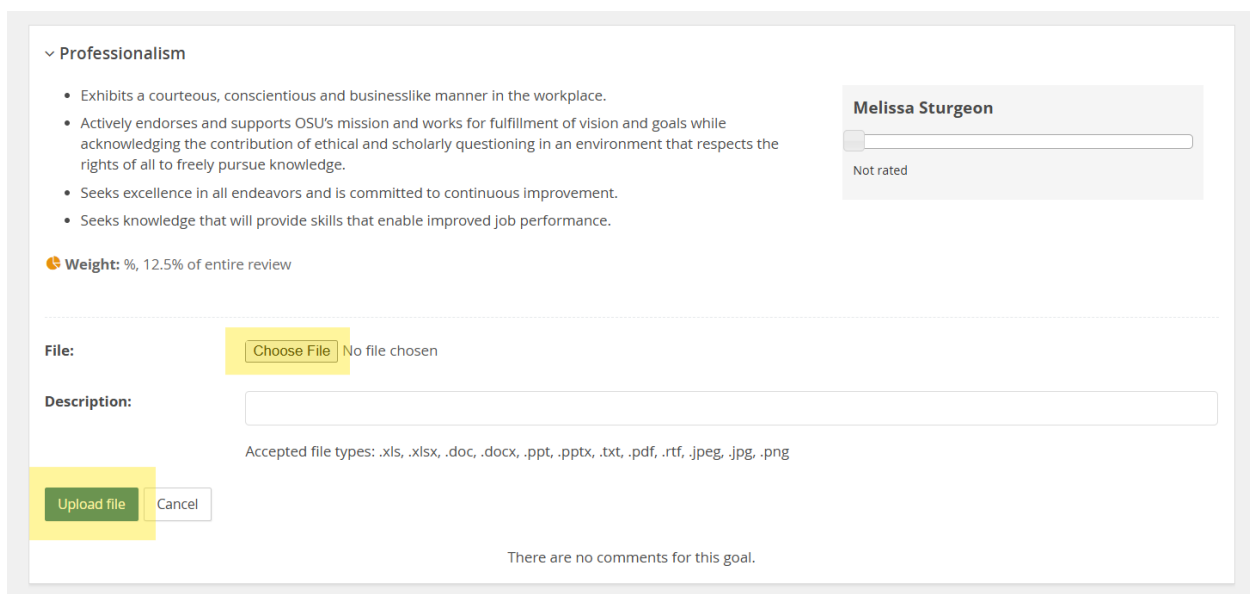
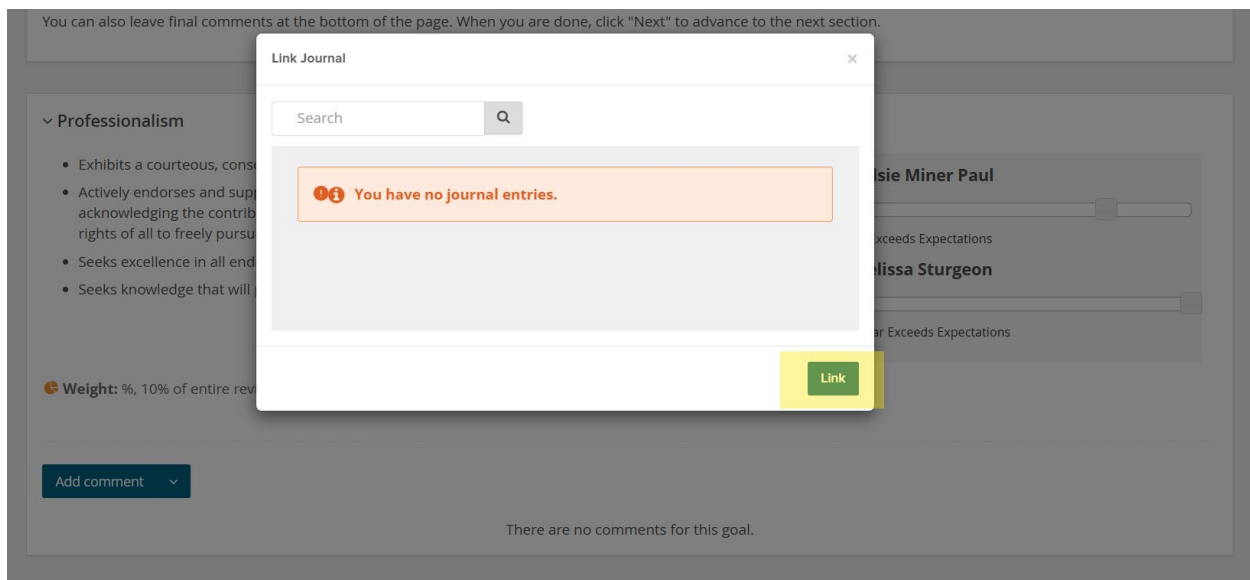
Link journal entry

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."**



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.

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.

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](http://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."

Welcome Melissa, you are logged in

My Performance Reviews

Team Performance Reviews

Kelsie Miner Paul

NEW OSU Stillwater No Self-Evaluation

Current step: Employee/Supervisor Review Discussion

Onboarding

Onboarding

Recruitment

Administration

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.

The screenshot shows the 'Next steps' tab selected in a breadcrumb navigation bar at the top, which also includes 'Start', 'Job Responsibilities', 'Core Competencies', and 'Goals'. Below the navigation bar, a green 'Saved' status is shown with the text 'Last saved: Jul 22, 2025, 11:13am' and an 'Actions' dropdown menu. A white box contains the instruction: '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.' Below this, a white box displays the 'Overall rating' as '4.2 / 5.0' with the text 'Exceeds Expectations'. To the right, a section titled 'Your next step: Employee Acknowledgement' features a progress bar with a green segment and a yellow segment. A yellow callout box with an information icon states: 'Clicking “Go to next step” will move this evaluation to the next step and you will be unable to return to this step'. Below this callout is a blue button labeled 'Go to next step'. At the bottom right of this section is a link that says 'View entire process'. On the left side, a 'Rating summary' section shows a table with columns for 'Rating summary', 'Melissa Sturgeon', and 'Kelsie Miner Paul'. Under the 'Rating summary' column, there is a dropdown for 'Job Responsibilities' and a table with one row: '1. Job Responsibility #1' with ratings '4 - Exceeds Expectations' and '3 - Meets Expectations'.

## Employee Acknowledgment

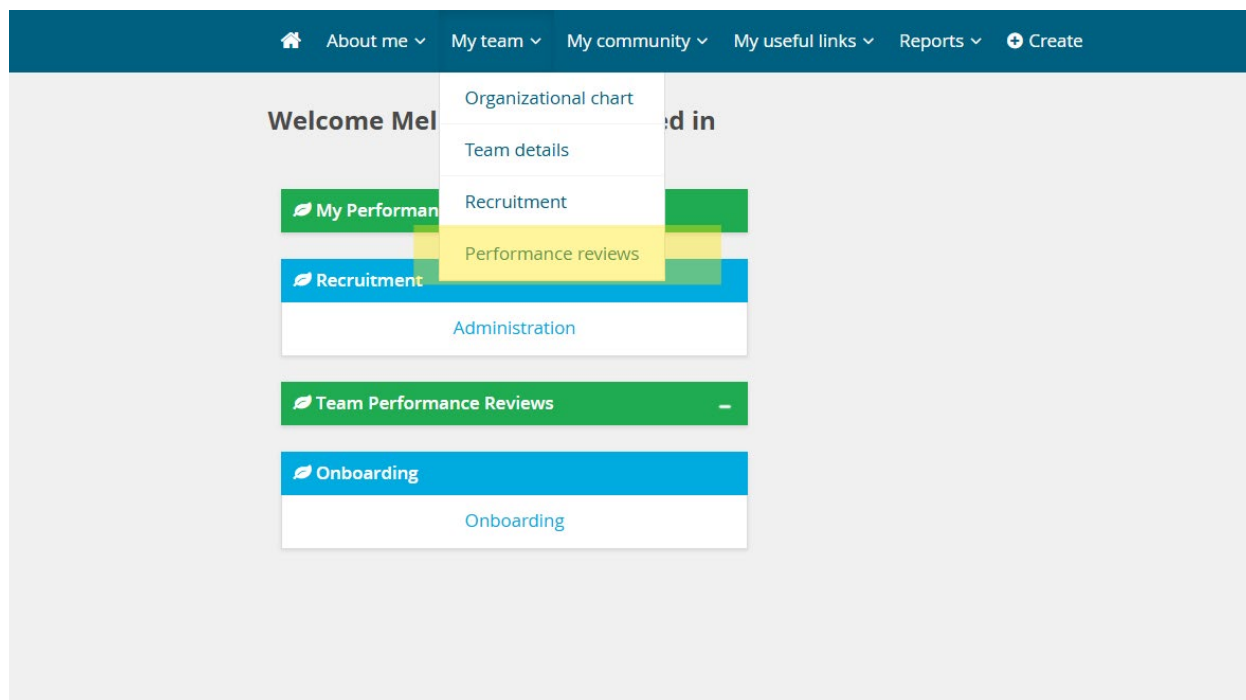
The supervisor will not have access to the evaluation during the Employee Acknowledgment step.

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'. On the right, there is a 'Journal entry' button and a user profile for 'Melissa'. Below the navigation bar, a message says 'Welcome Melissa, you are logged in'. The main content area has several sections: 'My Performance Reviews' (green header), 'Team Performance Reviews' (green header with a minus sign), and 'Onboarding' (blue header). Under 'Team Performance Reviews', there is a dropdown for 'Kelsie Miner Paul' and a new entry 'OSU Stillwater No Self-Evaluation' with the status 'Current step: Employee Acknowledgement' and a progress bar. Under 'Onboarding', there is a link for 'Onboarding'. Under 'Recruitment', there is a link for '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:

Level:

All

Employee preferred name:

Status:

Complete

Review process step:

Select

Role:

Clear

Search

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

Page 1 of 1

Jump to page

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