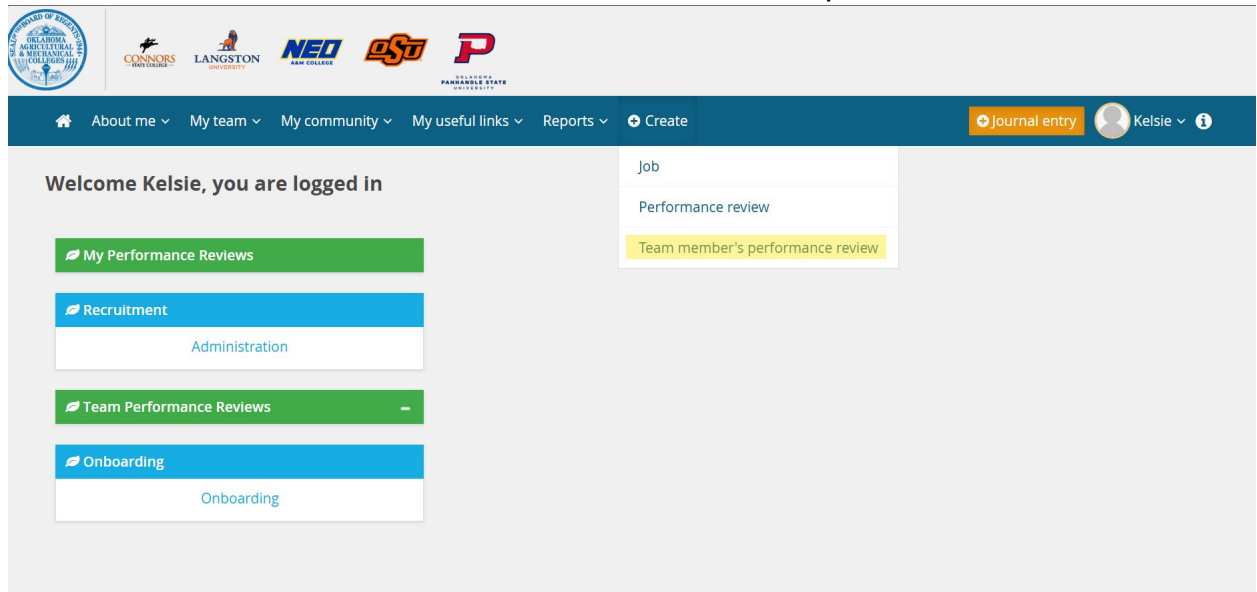


PageUp Performance User Guide

Supervisor Role, Performance Planning 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 be aligned 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:
 - a. OSU Stillwater Performance Planning Process: This 365-day template is a performance management tool recommended to be used for a full evaluation period and is launched at the **beginning** of the review period for an evaluation roughly 250 days from the initial launch. See glossary for more details.
 - b. OSU Stillwater Condensed Review Process: This template is recommended to be used for employees who begin employment after the start of the evaluation period, or for a shortened review process that does not utilize the performance management tools of the longer template.
 - c. OSU Stillwater Initial Probationary Period Review: This template will be used to complete initial probationary period evaluations and should be completed prior to an employee’s 90th day with the university.
 - d. OSU Stillwater No Self-Evaluation: This template is designed for areas that do not utilize an employee self-evaluation in the evaluation process.


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 1 year or 90 days, depending on the template selected.
7. **Supervisor:** name should populate but verify it is correct.
8. **1-up 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 Kelsie ▾



New: Performance review for team member



Review start date:* 1 Jul 2025 

Review process:* OSU Stillwater Performance Planning Pr ▾

Review end date:* Jul 1, 2026 

Employee:* Kelsie Miner Paul  

Manager:* Melissa Sturgeon  

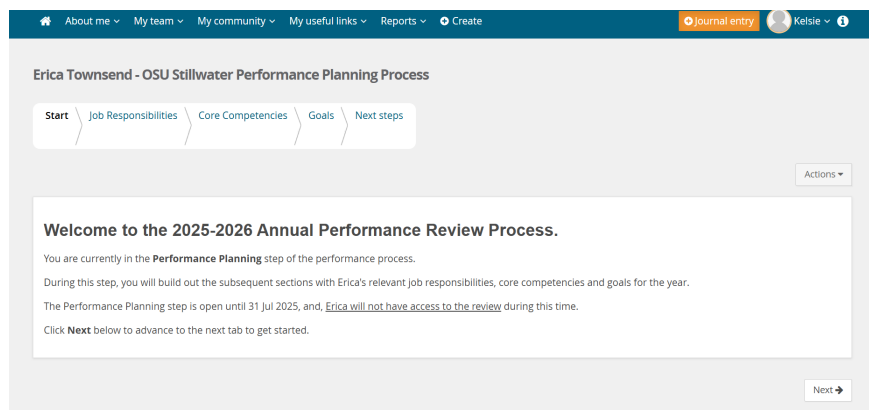
1-up manager: Christa Louthan  

☒ Copy from role
☐ Copy from an existing review

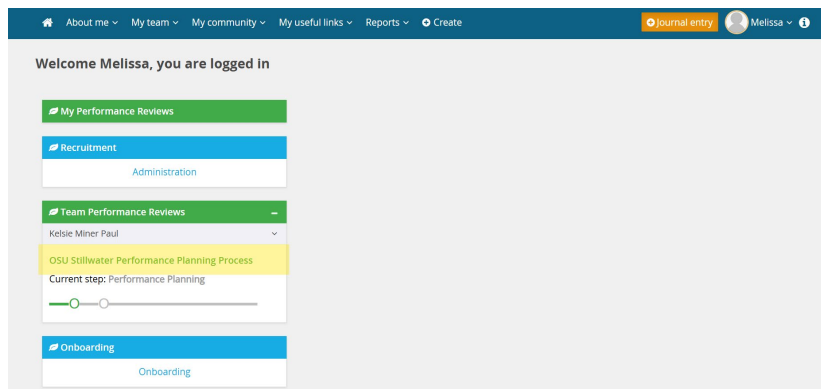
Save Cancel

How to Complete the Performance Planning Phase

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



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.



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

Kelsie Miner Paul - OSU Stillwater Performance Planning Process

Start Job Responsibilities Core Competencies Goals Next steps

Actions

Welcome to the 2025-2026 Annual Performance Review Process.

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, core competencies and goals for the year.

The Performance Planning step is open until 31 Jul 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

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 Performance Planning Process

Start Job Responsibilities Core Competencies Goals Next steps

Job Responsibilities

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](#).

Item title

Title Job Responsibility #1

Measure

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

Weight 50% of entire review

Attachment Upload document

Add Job Responsibilities

Back Next

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

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

Weight 50% of entire review

Attachment Upload document

Add Job Responsibilities

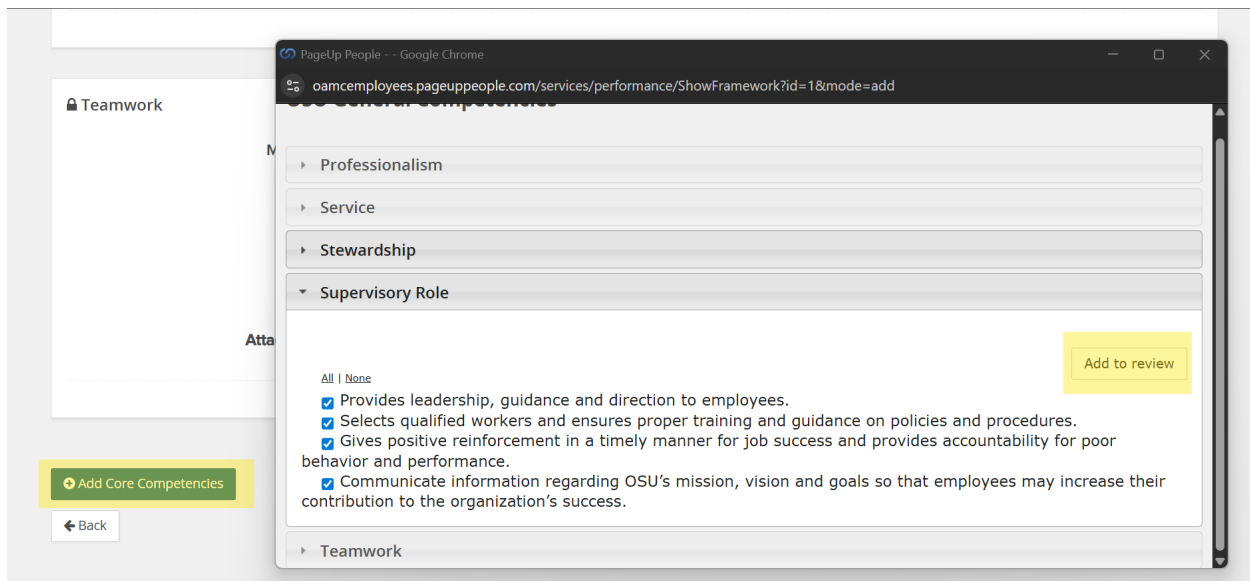
Back Next

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. If you will be setting goals for the employee, push the **"Next"** button at the bottom of the page to proceed to the **Goals** section. If you are not setting goals for the employee, select the **Next Steps** section.

Title*

Supervisory Role

Measure

B

I

U

↕

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

≡

Source

- 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.
- Communicate information regarding OSU's mission, vision and goals so that employees may increase their contribution to the organization's success.

Weight

%

10% of entire review

Attachment

Upload document

Add Core Competencies

Back

Next

Home

About me

My team

My community

My useful links

Reports

Create

Journal entry

Melissa

Kelsie Miner Paul - OSU Stillwater Performance Planning Process

Start

Job Responsibilities

Core Competencies

Goals

Next steps

Core Competencies

Saved

Actions

Competencies are the knowledge, skills, abilities and personal attributes that an employee needs to perform their job.

Toward the end of the evaluation period, the employee and supervisor will have the opportunity to evaluate and rate each of the competencies below.

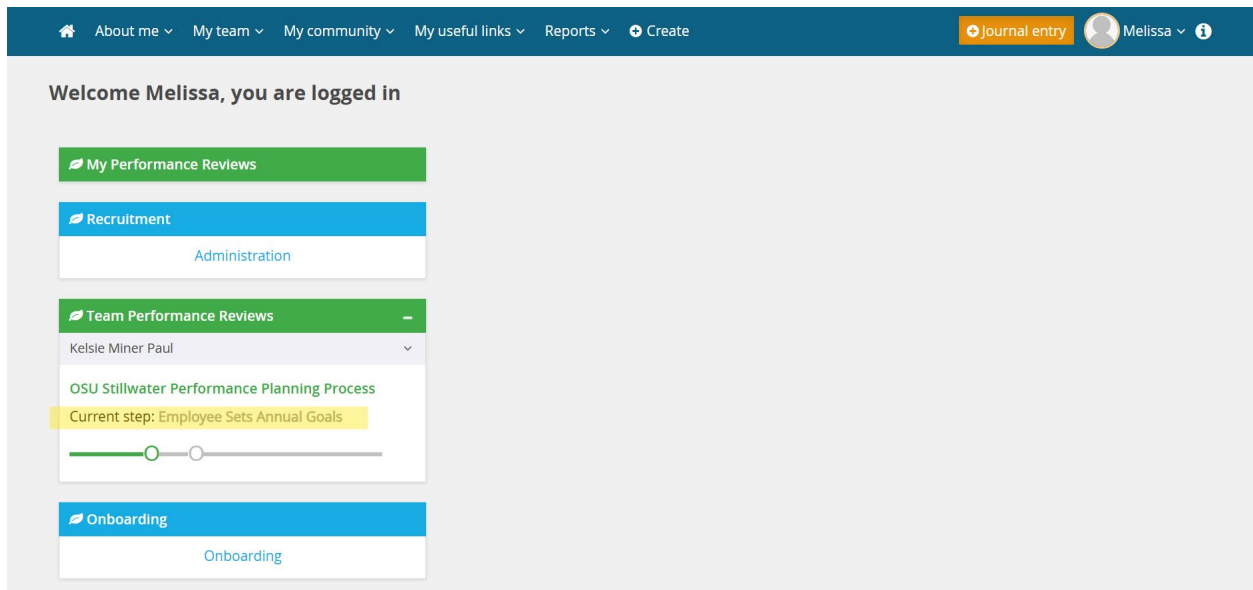
Supervisor Instructions:

Four required competencies have been pre-added to the page below. If the employee is in a supervisory role, click the "Add Core Competencies" button at the bottom of the page to select and add the supervisory competency as needed.

How to Add Employee Goals (if applicable)

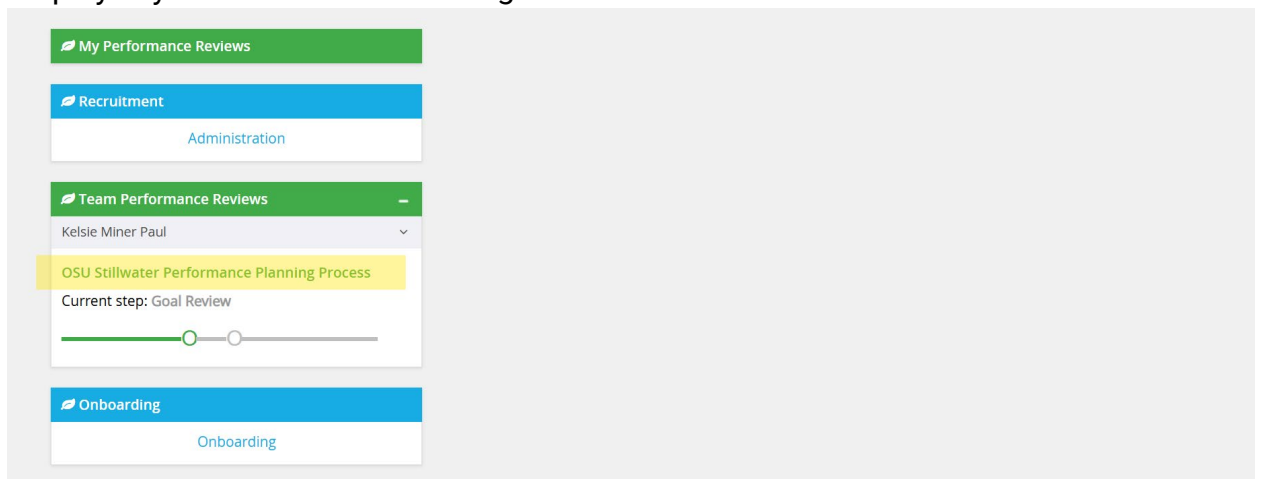
This is an optional step.

1. Review and follow the guidance on the **Goals** section tab, then select **"Add Goals"** or **"Next"** if not adding goals.



Goal Review

1. The system will move the evaluation into the **Goal Review** phase automatically after 20 days. Select the green text under "Team Performance Review" for the employee you would like to review goals for.



2. Review the **Start** section tab guidance. Then view and assess the goals in the "**Goals**" section tab. Meet with your employee to discuss the goals that were set and use this time to make necessary edits.

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

Last saved: Jul 21, 2025, 3:39pm Actions ▾

Kelsie Miner Paul's goals are available for review. Please view and assess in the goals tab above. During the goal review phase, you may meet with Kelsie to discuss.

Next ➔

3. The evaluation will progress to the next step, Coaching/Goal Tracking, after 20 days.

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

Last saved: Jul 21, 2025, 3:46pm Actions ▾

❗ Cannot progress review to next step, this will automatically occur on the 10 Sep 2025

Thank you for reviewing Kelsie's goals. In the next phase, please consider having coaching conversations and regularly discussing these goals.

Overall rating: Not rated

Summary: Summary

Your next step: Coaching/Goal Tracking

❗ Cannot progress review to next step, this will automatically occur on the 10 Sep 2025

Coaching and Goal Tracking

1. To start documenting coaching conversations and tracking goals in PageUp, please select the green text under the employee's name. This step will be available to the supervisor until the date posted on the "Next Steps" section.

My Performance Reviews

Recruitment
Administration

Team Performance Reviews
Kelsie Miner Paul ▾

OSU Stillwater Performance Planning Process
Current step: Coaching/Goal Tracking

Onboarding
Onboarding

2. Review the guidance on the Start section tab. During this phase, you can update the employee's goal and make journal entries. Journal entries can later be linked to job responsibilities, core competencies and goals during the Supervisor Evaluation phase. Please note, only supervisors can update goals during this phase. Employees will not have editing access.

Kelsie Miner Paul - OSU Stillwater Performance Planning Process

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

Last saved: Jul 21, 2025, 4:13pm Actions

You are currently in the **Coaching and Goal Tracking** phase of the performance process.

While no action is required during this step, you have the opportunity to update Kelsie's goals and track progress against job responsibilities and core competencies. If needed, you will be able to make adjustments until the performance evaluation begins on 08 Mar 2026. You may use the "Journal entry" feature to document milestones and track goals.

Employees can view their review during this phase, but cannot make changes to the review content.

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

Next →

3. When adding a **Journal entry**, please ensure it is titled with the employee's name, date and subject. This will make linking to the correct employee evaluation easier during the Supervisor Evaluation phase.

Add Journal entry

Met with EMPLOYEE NAME on DATE to discuss SUBJECT

You may use the "Journal Entry" feature to document milestones and track goals.

Add

✉ My journal mail matcher

Use your mail matcher address to send journal entries via email. Ensure you have added the [journal] tag in your email: [My journal](#)
<melissa_sturgeon.qlqb.lyvmpl.XAMUL@m.dc4.pageuppeople.com>

4. Note, the Coaching and Goal Tracking step is set to close on the date identified on the screen. It will then advance to the employee self-evaluation phase.

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

Last saved: Jul 21, 2025, 4:13pm Actions ▾

❗ Cannot progress review to next step, this will automatically occur on the 09 Mar 2026

This review will automatically advance into the **employee self-evaluation** step on the date displayed above.
Until then, you can log back in to view and document progress toward Kelsie's goals.

Summary

Summary

Job Responsibilities

1. Job Responsibility #1

Core Competencies

Goals

Your next step: Employee Self-Evaluation

❗ Cannot progress review to next step, this will automatically occur on the 09 Mar 2026

[View entire process](#)

Employee Self-Evaluation

After the Coaching/Goal Tracking 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 35 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 35 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."

Home About me My team My community My useful links Reports Create Journal entry Melissa

Welcome Melissa, you are logged in

- My Performance Reviews
- Recruitment
 - Administration
- Team Performance Reviews
 - Kelsie Miner Paul
 - OSU Stillwater Performance Planning Process
 - Current step: Supervisor Evaluation
- Onboarding
 - Onboarding

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

Start Job Responsibilities Core Competencies Goals Next steps

Last saved: Jul 22, 2025, 10:34am Actions

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.

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.

Job Responsibility #1

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

Weight: %, 50% of entire review

There are no comments for this goal.

Bottom menu: Add comment, Link journal entry, Upload file

Rating section:

Reviewer	Rating
Kelsie Miner Paul	3 - Meets Expectations
Melissa Sturgeon	Not rated

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

Bottom menu: Add comment

There are no comments for this goal.

Link Journal Modal:

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

Add comment
 Link journal entry
 Upload file

There are no comments for this goal.

Kelsie Miner Paul
 4 - Exceeds Expectations
 Melissa Sturgeon
 5- Far Exceeds Expectations

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

There are no comments for this goal.

Kelsie Miner Paul
 Exceeds Expectations
 lissa Sturgeon
 Far Exceeds Expectations

Link Journal

Search

You have no journal entries.

Link

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:

No file chosen


Description:


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
















































There are no comments for this goal.

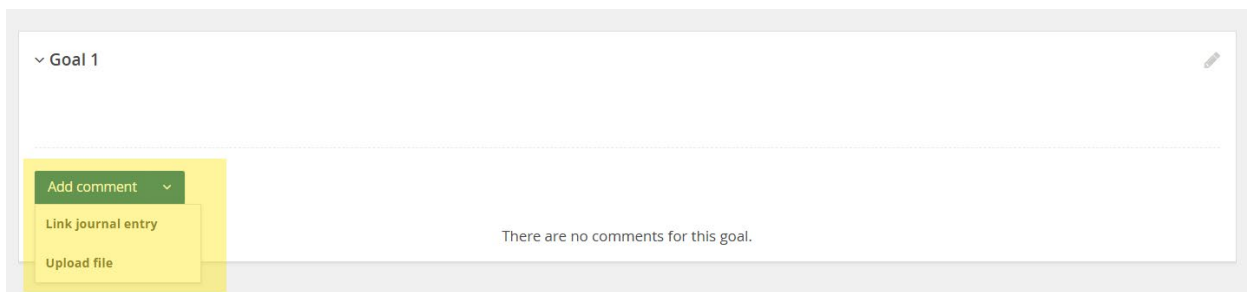
1. The very last rating is the summary of core competencies. Leave final comments in the **“Summary: Core Competencies”** text box. The system automatically averages the scoring, which cannot be altered by a supervisor or an employee. The weighted value of each core competency is set by the system. The Core Competency section of the review accounts for 50% of the overall evaluation score. When finished, push the **“Next”** button to move on to Goals.

Summary: Core Competencies

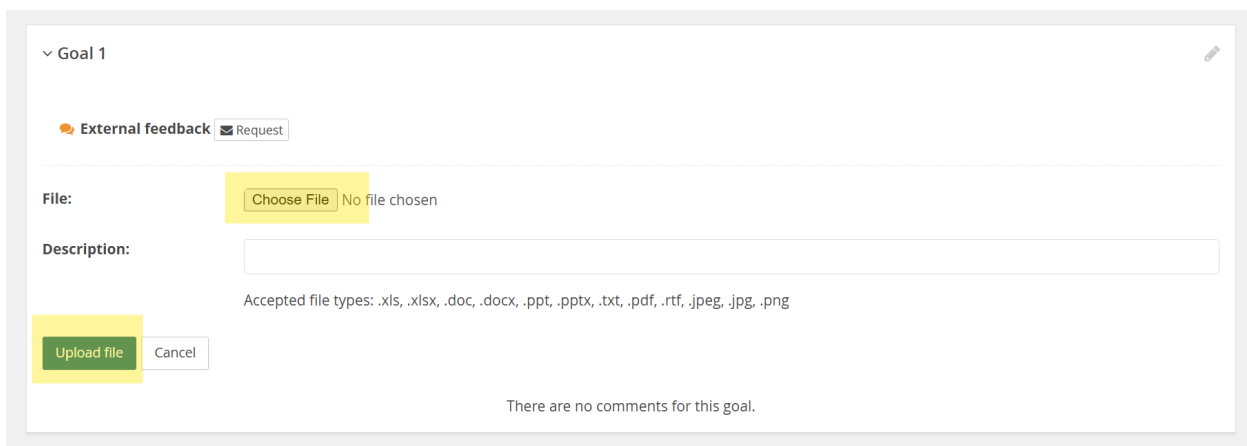
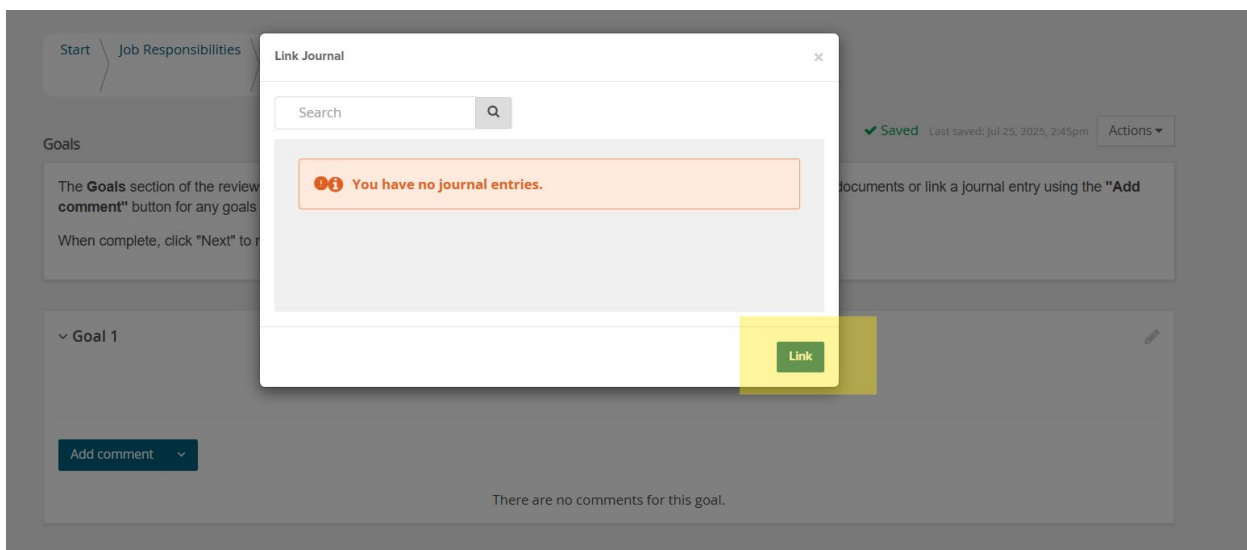

Kelsie


Melissa

B **I** **U**                                               



- 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 you would like to upload, then pushing **“Upload file.”**




1. Leave final comments in the **“Summary: Goals”** text box. When finished, push the **“Next”** button to move on to the **Next steps** section tab.

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

Push **"Acknowledge"** to progress the evaluation to the skip level supervisor to review and sign-off. Please note, per policy the evaluation must be signed off by the skip-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**

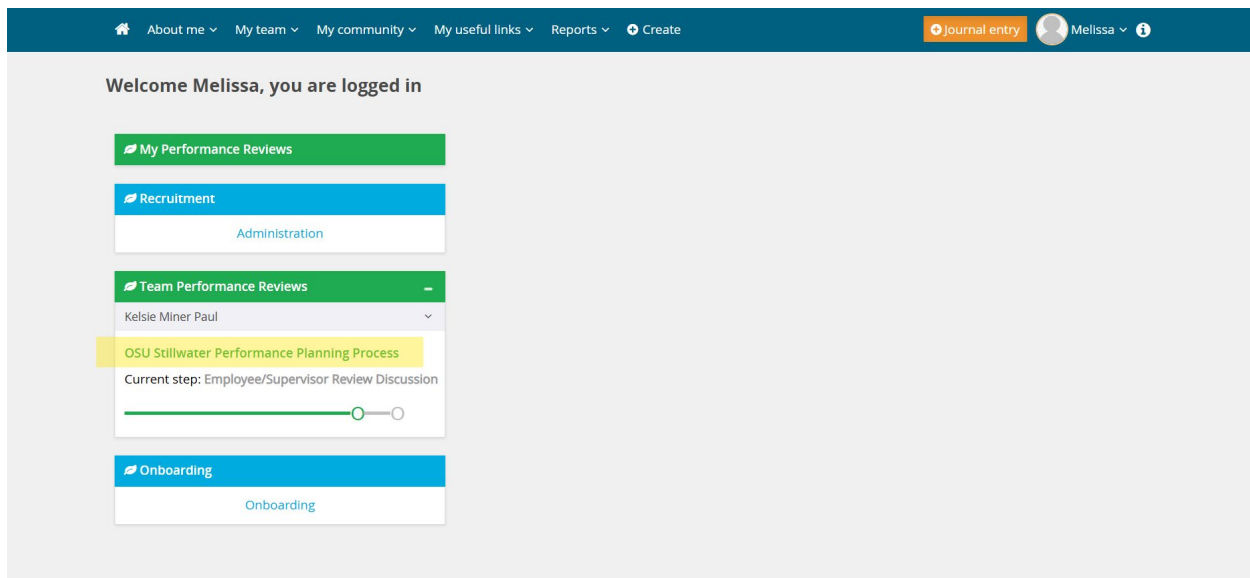
Melissa, as the supervisor, do you approve Kelsie's evaluation? Acknowledge

Erica has not approved this evaluation

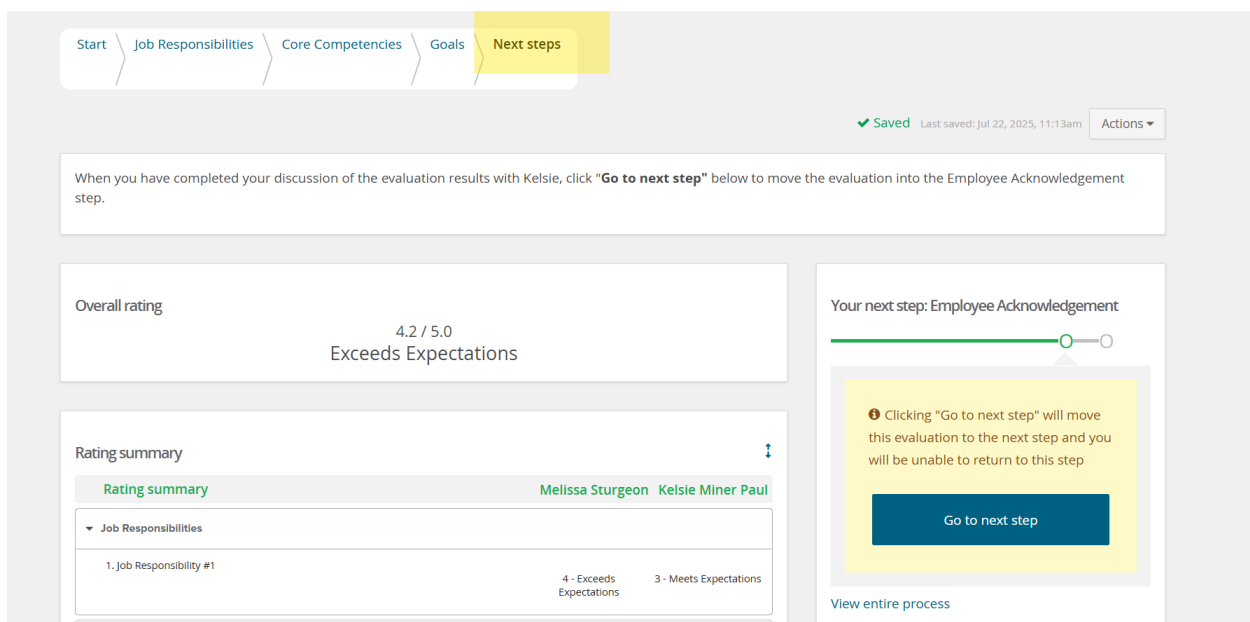
[View entire process](#)

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 30 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."

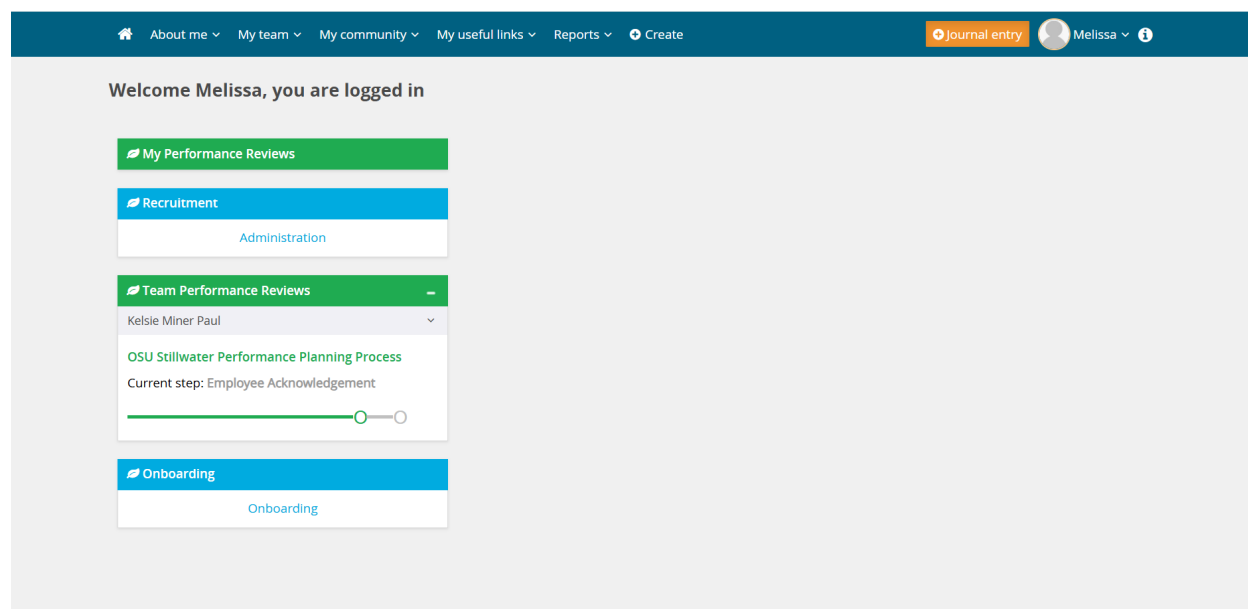


Review the guidance on the **Start** page and complete a discussion with the employee. Once the discussion has been completed, push the “**Next steps**” section tab. Review the text in the yellow box and click “**Go to next step**” to move the evaluation to the Employee Acknowledgment step. This will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



Employee Acknowledgment

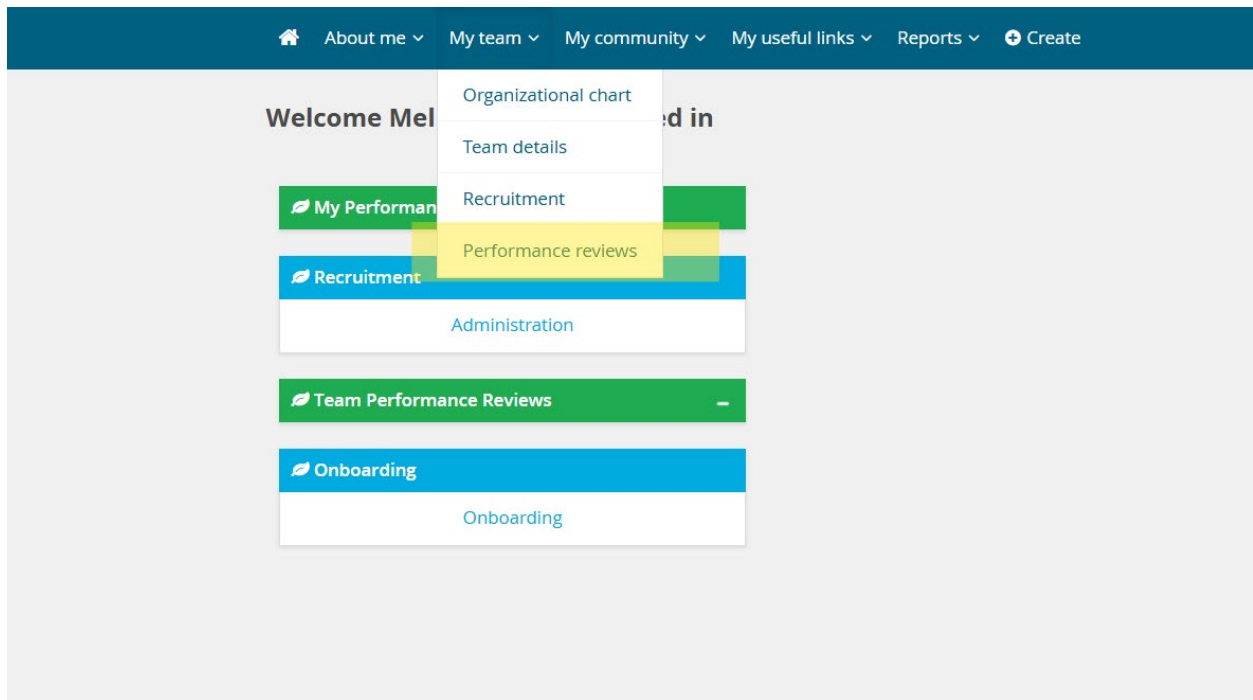
The supervisor will not have access to the evaluation during the Employee Acknowledgment step.



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 14 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."



- 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).

The screenshot displays the 'My team performance reviews' search interface. It includes a header with navigation links and a user profile for Melissa. The search filters are as follows:

- Employee first name:
- Employee last name:
- Level:
- Status:
- Employee preferred name:
- Review process step:

Buttons for 'Clear' and 'Search' are located to the right of the filters. Below the filters, a table with the following columns is shown: Employee, Review process, Review step, Role, Start date, and Due date. The table is empty, displaying the message 'There are no items to show.' The footer indicates 'Page 1 of 1', 'Jump to page', and 'Records 0 to 0 of 0'.