



OKLAHOMA STATE UNIVERSITY
OKLAHOMA CITY

ANNUAL PERFORMANCE REVIEW

*The document contains instructions for the employee, supervisor, and indirect supervisor. Everyone will log into the talent management system the same way but will have different responsibilities once the system is accessed. You can use control and click directly on the step below to go directly to the section. Be mindful of the deadlines. Overall completion deadline is **May 31, 2024**.*

LOG INTO TALENT MANAGEMENT SYSTEM

STEP ONE – SUPERVISOR ENTERING MAJOR RESPONSIBILITIES OF POSITION

Deadline - Same day as the evaluation is created.

STEP TWO – EMPLOYEE COMPLETING SELF REVIEW

Deadline - Within 5 days of supervisor assignment of the evaluation

STEP THREE – SUPERVISOR RATING EVALUATION

Deadline – Within 14 days of completion of employee self-review

STEP FOUR – INDIRECT MANAGER REVIEW AND SIGNATURE

Deadline – Within 5 days of supervisor completion of evaluation

STEP FIVE – EVALUATION MEETING

STEP SIX – SUPERVISOR SIGNATURE

Deadline – The day of the evaluation

STEP SEVEN – EMPLOYEE SIGNATURE

Deadline – The day of the evaluation. If an employee would like to add an additional statement regarding the evaluation, it should be submitted to HR within 10 days of the evaluation meeting to be placed in the personnel file.

LOG INTO TALENT MANAGEMENT SYSTEM

1. Start at my.okstate.edu.
2. Choose OSU-Stillwater/Tulsa if asked (all HR related information is in the Stillwater portal)

Choose Campus

Please choose your campus below to access resources provided by your campus.

OSU Oklahoma City
OSUIT
OSU Stillwater/Tulsa ←

3. Choose Employee tab.



4. Choose Talent Management System

Employee

Employee Links

Employee Self Service Links

- [Employee Dashboard](#)
- [Historical Pay Stub](#)

Other Information

- [HR Website](#)
- [Manage Expertise Information](#)
- [OK Corral](#)
- [OSU Stillwater/Tulsa Bursar Account](#)
- [OSU-OKC Bursar Account](#)
- [OSU-CHS Bursar Account](#)
- [Talent Management System](#)

Benefits and Deductions

[Benefits: Enroll, Verify, Qualifying Event](#)
[United Way](#)

Administrative Access

[Banner Administrative \(Banner 9 \)](#)
[Banner HR Information and Quick Reference](#)
[Banner Access Request](#)
[Cognos 11](#)
[ePrint](#)
[Online EPAFs](#)

5. Choose Performance.

America's Brightest Orange

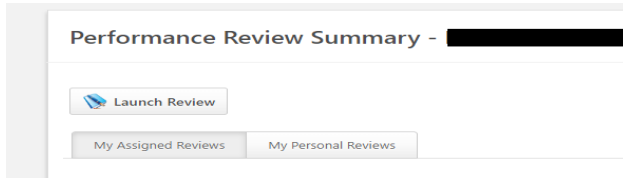
You can access your professional development through the **LEARNING** portal, **SEARCH JOBS** if you are managing or looking for open positions, or access the **PERFORMANCE** portal to manage performance reviews and feedback opportunities.



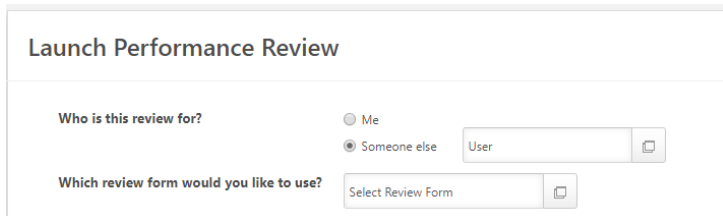
[Back to top](#)


STEP ONE – SUPERVISOR ENTERING MAJOR RESPONSIBILITIES OF POSITION

1. Performance Review Summary page - This section will allow you to launch a new review, review ones assigned to you, and your personal reviews. For a new review, choose Launch Review.



2. Launch Performance Review - This section allows you to launch a review for yourself or someone else and the type of review form.



3. In this case, you will choose the selection for someone else. You will click  which will bring up the screen where you can choose the employee. Type in their first and last name and search. Double click on the name. **The review form you MUST use is the OSU – Oklahoma City Performance Evaluation 2024. Do not use the Generic Evaluation forms or you will be required to complete a 2nd review on the correct form.**

Launch Performance Review

Who is this review for? *
 Me
 Someone else

Which review form would you like to use? *

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

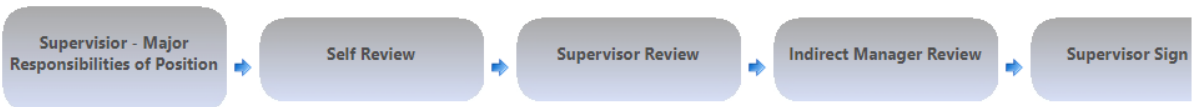
Expiration Date: *
5/31/2024

What is the review period? *
From: To:

OSU-Oklahoma City Performance Evaluation 2024

Description: 2024 Performance Review

Workflow:



Add the following items.


Review Type – Annual Review

What is the review period – 5/1/2023 through 4/30/2024– Then Launch on the bottom right.

You should complete this step for every employee that you are completing evaluations.

4. Performance Review Summary page

Once you launch the evaluation, you have one day to add the four major responsibilities and send it forward to the employee. You should be able to get this information from the revised job descriptions.

Click on the  Complete Manager Review to begin.

TEST -OSU-Oklahoma City Performance Evaluation

Overview

0%

Review Step Progression

- Supervisor - Major Responsibilities of Position
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Get Started

You can view the % of completion at the top right and what step you are in by looking at the bottom of the page. Click Get Started.

- The first section is Major responsibilities of the Position. Supervisors will list one major responsibility in each comment box for a total of four and submit. You can easily cut and paste from the job descriptions. You will not enter a score at this level.

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0%

OSU - Oklahoma City Major Responsibilities of Position

Supervisors: Please list one major 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.

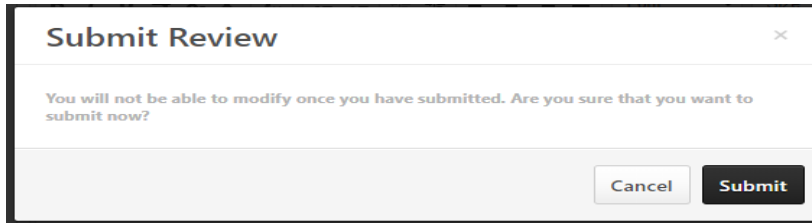
Employees: Please provide a rating and comments regarding your performance related to the responsibility your supervisor listed in the comment section.

Responsibility 1

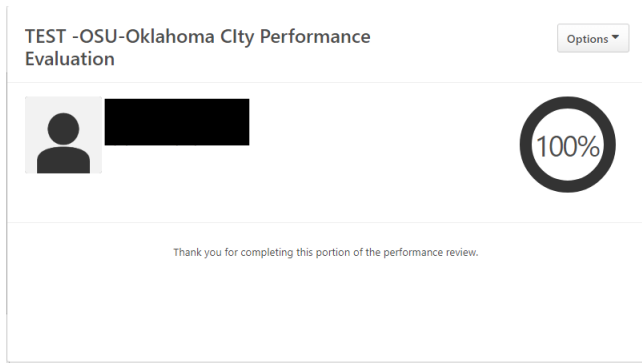
Please comment on the rating as needed:

Rich text editor toolbar: B, I, U, S, X, K, T, L, Font, Size, A, A.

You will receive a warning message to make sure you are ready to submit.



You will receive the notice that you are 100% complete with this step. The review is now moved to the employee cue.

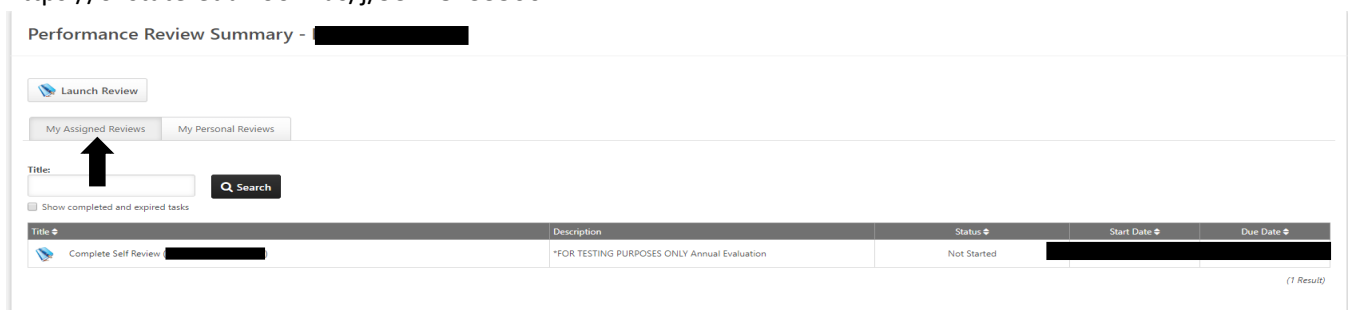


[Back to top](#)

STEP 2 – EMPLOYEE SELF REVIEW

1. Employee will log into the Talent Management System and choose Performance.
2. Performance Review Summary – Employee will launch performance review by clicking on my assigned reviews and chose the one with current start date.

<https://okstate-edu.zoom.us/j/93748233500>



TEST -OSU-Oklahoma City Performance Evaluation

Overview

The supervisor will begin by identifying the employee's major 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 performance responsibilities need to directly relate to the position description.

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

The supervisor will then complete his/her 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 and 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 personal file.

If an employee's overall rating is below a 3.0, the supervisor should work with Human Resources to take appropriate corrective action. 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.

Review Step Progression

- Supervisor - Major Responsibilities of Position
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Get Started

You can view the % of completion at the top right and what step you are in by looking at the bottom of the page. Click Get Started.

3. Employee will complete self-evaluation on the following areas:

A. Four major responsibilities – each responsibility will have a score

B. Cowboy Code – One score for all three behaviors

Initiative and Dependability – The ability to use sound judgement to make decisions appropriate to job level; knows what needs to be done and does it without step-by-step instructions and reminders; demonstrated positive safety behaviors; can be relied upon to complete assignments in a timely manner; demonstrates consistent attendance at work; knows, understands, and adheres to policies and procedures.

Listening and Communication – Practices active listening; has patience to hear people out; can accurately restate opinion of others even when he/she disagrees; ability to convey thoughts, concepts and ideas in a way that is clear and understandable; knows what to communicate, to whom and when, and does so in an appropriate manner.

Teamwork and Interpersonal Skills – Ability to work with others to achieve a common goal; cooperative; encourages collaboration; relates well to others; builds positive relationships; uses diplomacy and tact; builds rapport with others easily.

C. Core Values – One score for all five core values

Stewardship of Resources – Uses University resources wisely and encourages others to do so, as well; accepts individual responsibility for actions that affect institution; pursues opportunities to deliver services more efficiently and effectively.

Integrity – Committed to principles of truth and honesty; straightforward, forthright and appropriate in communications; keeps confidences; admits mistakes; widely trusted; honors commitments and promises; upholds the highest ethical conduct.

Diversity – Seeks opportunities to learn and understand other cultures and appreciates differences; respects different opinions; seeks to understand before acting.

Service – Anticipates the needs of others; provides prompt and courteous service with a positive attitude; takes pride in what he/she does; passion for assisting customers and representing the OSU brand with positivity and professionalism.

Excellence – Seeks excellence in all endeavors; embraces change; recognizes personal strengths and weaknesses and strives for improvement; seeks improvement in processes and services; demonstrates positive safety behaviors; cultivates a passion for life-long learning; attends required training such as Safety, HIPPA, FERPA, and Title IX; attends two professional development opportunities per year.

- D. Strategic Plan** - Models the Mission and Vision; recognizes the significance of the Strategic Plan and continuous improvement reflects the implementation and participation in the goals, initiatives, and strategies of the plan.
- E. Attendance** - Demonstrates punctuality and begins work as scheduled, contact supervisor concerning absences on a timely basis, can be depended upon to be available for work.

F and G are Supervisor categories only - If not in a supervisory position, chose N/A for this score.

- F. Leadership – Supervisor Evaluation Only** - Demonstrates the ability to direct others in accomplishing work; demonstrates professional, administrative, supervisory and/or specialized knowledge required to perform the job; high quality of service; functions effectively under pressure; represents self and situations honestly; responds appropriately to criticism; manages budget, assets including technology, equipment.
- G. Staff Development – Supervisor Evaluation Only** - Effectively evaluates staff performance; Coaches for performance including plans of improvement if needed; provides opportunities for others to develop skills; creates a culture supportive of staff, which fosters individual motivation, high levels of individual and team performance.

Detail of each box can be found on the top right corner.

OSU - Oklahoma City Attendance	▼
Demonstrates punctuality and begins work as scheduled, contact supervisor concerning absences on a timely basis, can be depended upon to be available for work.	

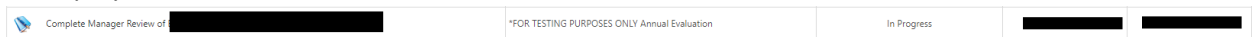
- The final sections is not scored but lists the accomplishments of the review year and a **minimum of two goals for the next year**. Be sure to specify which goal, initiative or strategy is associated with accomplishment and goals. This is a self-review. Managers will comment in the next step.
- You will receive the notice that you are 100% complete with this step. The review is now moved to the supervisor cue.



[Back to top](#)

STEP 3 – SUPERVISOR RATING EVALUATION

- Supervisor will log into the Talent Management System and choose Performance. Performance Review Summary – Supervisor will launch performance review by clicking on the name of employee with current dates



- Supervisors will be able to see the ratings and comments made by the employee. **A score and comment is required on each section.** Accomplishments for the reviewing period and a **minimum of two goals will be entered for the next year.** Be sure to specify which goal, initiative or strategy is associated with accomplishment and goals. If non-supervisory position, be sure to select N/A on Leadership and staff development. Refer to Performance Evaluation Guidelines for guidance. Submit once completed.

STEP 4 – INDIRECT MANAGER REVIEW AND SIGNATURE

- Indirect manager will log into the Talent Management System and choose Performance. Performance Review Summary – Indirect Manager will launch performance review by clicking on

TEST -OSU-Oklahoma City Performance Evaluation

Overview

The supervisor will begin by identifying the employee's major 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 performance responsibilities need to directly relate to the position description.

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

The supervisor will then complete his/her 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 and 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 should work with Human Resources to take appropriate corrective action. 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.

Review Step Progression

- Supervisor - Major Responsibilities of Position
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Reopen Step | **Get Started**

You can view the % of completion at the top right and what step you are in by looking at the bottom of the page. Click Get Started.

2. Indirect Managers will review the scores and comments by the employee and supervisor to ensure appropriateness of the scores and comments. If desired, comments can be made in the achievement and Goal text boxes. After all of the sections are reviewed, a score for the self-review and supervisor.

TEST -OSU-Oklahoma City Performance Evaluation

Summary


Overall Rating: 3 - Fully Meets Job Requirements

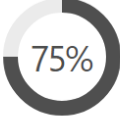
	Self Review	Supervisor Review
OSU-Oklahoma City Core Competencies	3.0 / 5.0	3.0 / 5.0
OSU - Oklahoma City Major Responsibilities of Position	3.0 / 5.0	3.0 / 5.0
OSU - Oklahoma City Accomplishments and Goals	N/A	N/A
Overall	3.0 / 5.0	3.0 / 5.0

Back | Next

3. Signature – Type in your name to record approval of the review and submit.

TEST -OSU-Oklahoma City Performance Evaluation Options ▾





Signatures

I acknowledge that I have seen this report and have been apprised of this evaluation.
 I understand that I may make a written statement within ten working days. If a statement is submitted within ten days, it will be placed in the employee file.


Self
Pending Signature


Manager
Pending Signature

Indirect Manager

And you will see 100% completed.

TEST -OSU-Oklahoma City Performance Evaluation Options ▾





Thank you for completing this portion of the performance review.

[Back to top](#)

STEP FIVE – EVALUATION MEETING

Employee and Supervisor meet to discuss the evaluation. Copies could be printed to reference by clicking the Options button at the top right of the screen of any form. To ensure all comments are available, print after the indirect manager signature. Be sure to schedule adequate time for the meeting and without distractions. Refer to Performance Evaluation Guidelines for guidance.

STEP SIX – SUPERVISOR SIGNATURE

1. Supervisor will log into the Talent Management System, and choose Performance. Performance Review Summary – Supervisor will launch performance review by clicking on

Complete Manager Review of [REDACTED] *FOR TESTING PURPOSES ONLY Annual Evaluation In Progress 5/2/2019 5/17/2019

TEST -OSU-Oklahoma City Performance Evaluation

Overview

0%

Overview

The supervisor will begin by identifying the employee's major 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 performance responsibilities need to directly relate to the position description.

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Review Step Progression

- Supervisor - Major Responsibilities of Position
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Reopen Step Get Started

You can view the % of completion at the top right and what step you are in by looking at the bottom of the page. Click Get Started.

2. Signature – Type in your name to record approval of the review and submit. After submit, you will see 100% complete.

TEST -OSU-Oklahoma City Performance Evaluation

75%

TEST -OSU-Oklahoma City Performance Evaluation

Options

Options

100%

Thank you for completing this portion of the performance review.

Back Save and Exit Submit

STEP SEVEN – EMPLOYEE SIGNATURE

1. Employee will log into the Talent Management System and choose Performance. Performance Review Summary – Employee will launch performance review by clicking on

Complete Manager Review of [redacted] Annual Evaluation 2019

*FOR TESTING PURPOSES ONLY Annual Evaluation

In Progress

5/2/2019

5/17/2019

TEST -OSU-Oklahoma City Performance Evaluation

0%

Overview

The supervisor will begin by identifying the employee's major 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 performance responsibilities need to directly relate to the position description.

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Review Step Progression

- Supervisor - Major Responsibilities of Position
- Self Review
- Supervisor Review
- Indirect Manager Review
- Supervisor Sign Off
- Employee Sign Off
- HR Holding Queue

Get Started

You can view the % of completion at the top right and what step you are in by looking at the bottom of the page. Click Get Started.

Signature – Type in your name to record approval of the review and submit.

TEST -OSU-Oklahoma City Performance Evaluation

75%

Signatures

I acknowledge that I have seen this report and have been apprised of this evaluation. I understand that I may make a written statement within ten working days, if a statement is submitted within ten days, it will be placed in the employee file.

Self

First and last name

Manager

Indirect Manager

TEST -OSU-Oklahoma City Performance Evaluation

100%

Thank you for completing this portion of the performance review.

After submit, you will see 100% complete.

[Back to top](#)