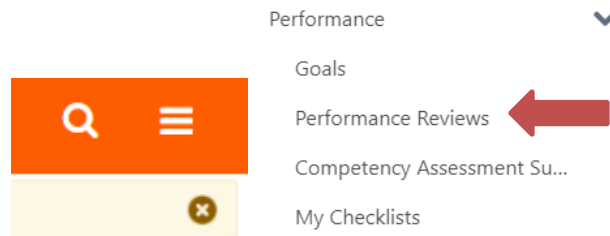


Employee User Guide Performance Management – Employee – self launch

Performance Review in Talent Management

1. From Google Chrome or Mozilla Firefox - Log into the Talent Management Systems using your O-key Credentials at <http://talent.okstate.edu>. Hover over the three lines in the upper right corner of the screen, then click on Performance Reviews



2. Select the Review that best describes your role.

The correct performance review form depends on your role:

- CHS/Tulsa Staff Performance Review (no supervisory role)
- CHS/Tulsa Supervisor Performance Review (supervisory role)
- CHS Faculty Performance Review

Performance Review Summary -

Launch Review

My Assigned Reviews My Personal Reviews

Title:

☐ Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Complete Self Review	CHS/Tulsa Staff Performance Review is the performance review...	Not Started	10/9/2018	11/8/2018
Complete Self Review	CHS/Tulsa Supervisor Performance Review is the performance r...	Not Started	10/9/2018	11/8/2018

(2 Results)


3. The form will automatically open. Read and follow the instructions in each step. The Overview gives a brief description of the evaluation period, completion date and the steps for the review to be completed.

- **Note for the employee that the review will come back to them for signature.**

Overview

CHS/Tulsa TRAINING Standard Cycle Staff Performance Review

Options ▾



4/1/2018 - 10/1/2018

0%

Overview

Review Period: April 2018 to April 2019

Completion Due Date for the review is April 15, 2019

Form available dates: January 1, 2019 to April 15, 2018

The steps include:

1. Human Resources sends out the notice for All Employees to begin their own review electronically.
2. Employee completes Employee Assessment portions and submits electronically, which automatically sends to supervisor for supervisor to complete their portion.
3. The Supervisor completes their portion including remarks and scores in the electronic form.
4. **Before submitting electronically**, the Supervisor **STOPS** and sets a meeting to discuss the performance with the employee. Then, reviews the form and scores with the employee in a performance review meeting.
5. After the meeting, the Supervisor makes any necessary adjustments/additions to the electronic review as discussed in the review meeting. Then signs and submits the review electronically.

The employee is notified via email to view, sign and submit electronically.

The review then goes to next level supervisor to view, sign and submit electronically.

Once all signatures are completed, the form is electronically sent to Human Resources by due date **April 15, 2019**.

This concludes the Performance Review process for this employee.

- You can see the progress of the form

Review Step Progression

✓

Self Review
Due: 11/8/2018

✓

✓

Manager Review

✓

✓

Employee View and Signature

✓

✓

Indirect Supervisor Signature

✓

✓

CHS/Tulsa HR User

✓

Get Started

- Click “Get Started” in the bottom right corner of the screen.



Core Values Section

4. For Staff and Supervisor, the forms start with Core Values pictured below:
 - For Faculty-one score includes: Core Values, Major Responsibilities, Behaviors and Supervisory Skills if applicable.
 - Each section gives you the chance to describe your performance in a text box.
 - The circle to the right shows a dropdown arrow that displays the Core Values with more detail.

CHS/Tulsa Core Values

Employee: Provide a narrative to describe your performance as it relates to the following core values: Stewardship of Resources, Integrity, Respect of Diversity, Service to Others, and Excellence and Continuing Self-Improvement.

Supervisor/Manager: Provide a narrative and a rating to describe the employee's performance as it relates to the following core values: Stewardship of Resources, Integrity, Respect of Diversity, Service to Others, and Excellence and Continuing Self-Improvement.

CHS/Tulsa Core Values

The OSU Core Values are: Stewardship of Resources, Integrity, Respect for Diversity, Service to Others, and Excellence and Continuous Self-Improvement. Click on the dropdown arrow to the right for more details describing the OSU Core Values.

Comments:

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Back

Save and Exit

Save and Continue

- You can save and exit to come back at a later time.
- There are other text options within the form that you can do such as:
 - You can cut and paste from other word document.
 - Add color, italicize or bold your text.
 - Number or bullet point your text.

- You can even save/print your review to reference what you wrote for the meeting with your supervisor.

5. Save and Continue to go on to the next section. Save and Exit to save your work and come back later.
- You can see your progress through the sections in the form on the left.
 - Overview>Core Values>Major Responsibilities>Behaviors> etc.

Major Responsibilities

6. Save and Continue to go on to the next section. Save and Exit to save your work and come back later.
 - The Major Responsibilities section includes the employee job duties as well as describing performance (see instructions).

CHS/Tulsa Major Responsibilities

Employee Major Responsibilities listed: the employee enters a brief list/description of the major responsibilities of their job in the text box below.

Employee Assessment: Employee provides a narrative describing ways in which they met expectations and ways in which they will continue to improve as it relates to the major responsibilities of their job they listed/described. Provide this narrative in the text box below the list/description of the major responsibilities.

Supervisor Assessment: Supervisor provides a narrative and one rating to describe the employee's performance as it relates to the major responsibilities in the position that the employee listed/described. Supervisor validates and edits the responsibilities as needed in the text box provided below.

Tulsa/CHS Major Responsibilities of Position (from job description) ▼

Employee enters a brief description of the major responsibilities/objectives here based on their job description. Supervisor validates this information.

Comments:

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Font Size A- A+

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Behaviors

7. Behaviors section has a dropdown arrow that explains the behaviors in greater detail.

CHS/Tulsa Behaviors

Employee: Provide a narrative to describe your performance as it relates to the following behaviors: Initiative, Dependability, Listening, Communication, Teamwork, Interpersonal Skills.

Supervisor/Manager: Provide a narrative and a rating to describe the employee's performance as it relates to the following behaviors: Initiative, Dependability, Listening, Communication, Teamwork, Interpersonal Skills.

CHS/Tulsa Behaviors

The behaviors are: Initiative, Dependability, Listening, Communication, Teamwork, and Interpersonal Skills. Click on the dropdown arrow to the right for more details describing these behaviors.

Comments:

B I U S x₂ x² I_x **¶** **☰** **☷** **☶** **☵** **☴** **☳** **☲** **☱** **☰** **Font** **Size** **A-** **A+**

ABC **↶** **↷** **✂** **📄** **📅** **📆** **📇** **📈** **☰**

Goals from the Past 12 Month Period

8. Follow the instructions on the form using the SMART (Specific, Measurable, Achievable, Relevance, Timely) goal method example provided:

CHS/Tulsa Goals from the Past 12 Month Period

Employee: List your goals from the past 12 month period. List each goal by numbering them and adding your comments for each in the text box below.

Supervisor: Evaluate the employee on completion of his/her goals. Adding the A, NA, IP, or DNA as directed for each goal. Make any necessary comments. You can copy & paste what the employee has provided into your comment box to score and make your own comments.

A=Achieved NA=No longer applicable IP=In progress DNA=Did not achieve

EXAMPLE:

Employee:

Goal 1. I plan to do 3 online excel courses to advance my knowledge on pivot tables.

EE Comment: I completed the online courses and learning about pivot tables helped me to do a comparison in a much shorter time period with less confusion.

Supervisor Comment: *EE's name* has mastered pivot tables and able to get me the comparison reports in a more timely manner. A=Achieved

CHS/Tulsa Goals

Comments:

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Goals for the Next 12 Month Period

9. Follow the instructions for the goals for the next period.
10. Be sure to add your professional development in the text box as well.

CHS/Tulsa Goals for Next 12 Month Period & Professional Development

List at least 3 specific position goals/objectives to work toward the next evaluation period. Include time frames, criteria for completion, and planned actions for supervisor to assist. Your supervisor must approve future goals/objectives.
Include your goals for the next period as a list in the text box below.

Position Goal Example:

1. I plan to decrease my errors on data entry to less than 1% within the first 3 months of this evaluation period.

Include training or professional development goals for the next period in the next text box below.

Professional Development Goal Example:

1. I plan to do 3 online excel courses in the LMS to advance my knowledge on pivot tables.

CHS/Tulsa Goals

Comments:

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11. Click Save and Continue to get to the Summary. At this point you can save or print by clicking on the Options in the top right corner before submitting to your supervisor.

CHS/Tulsa TRAINING Standard Cycle Staff Performance Review

Options

100%

Summary

Back

Submit

Overview

CHS/Tulsa Core Values

CHS/Tulsa Major Resp...

CHS/Tulsa Behaviors

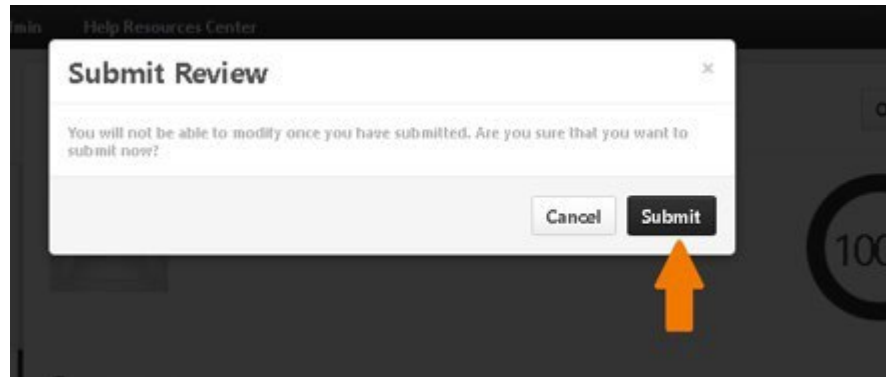
CHS/Tulsa Goals from...

CHS/Tulsa Goals for N...

Summary

Signatures

12. Once you have gone through all the steps, and are ready to submit to your supervisor for them to complete their portion, click Submit. A window will pop up asking if you are sure you want to submit. You cannot edit your comments after you submit.



The review auto-electronically goes to the Supervisor/Manager for their portion.

- An email will notify supervisor to open the talent.okstate website to complete the manager section.

13. The supervisor will complete their portion. Then have a one-on-one meeting with you to discuss your performance and scores.

After the one-on-one meeting and after the manager/supervisor Submits. The performance review will come back to you for your review and signature.

14. Reopen the form by logging into the talent site and hovering over Performance Tab and select Performance Reviews. Open the In Progress review.

Review Step Progression	
✓	Self Review ✓
✓	Manager Review ✓
✓	Employee View and Signature ✓ Due: 10/22/2018
○	Indirect Supervisor Signature ○
○	CHS/Tulsa HR User ○

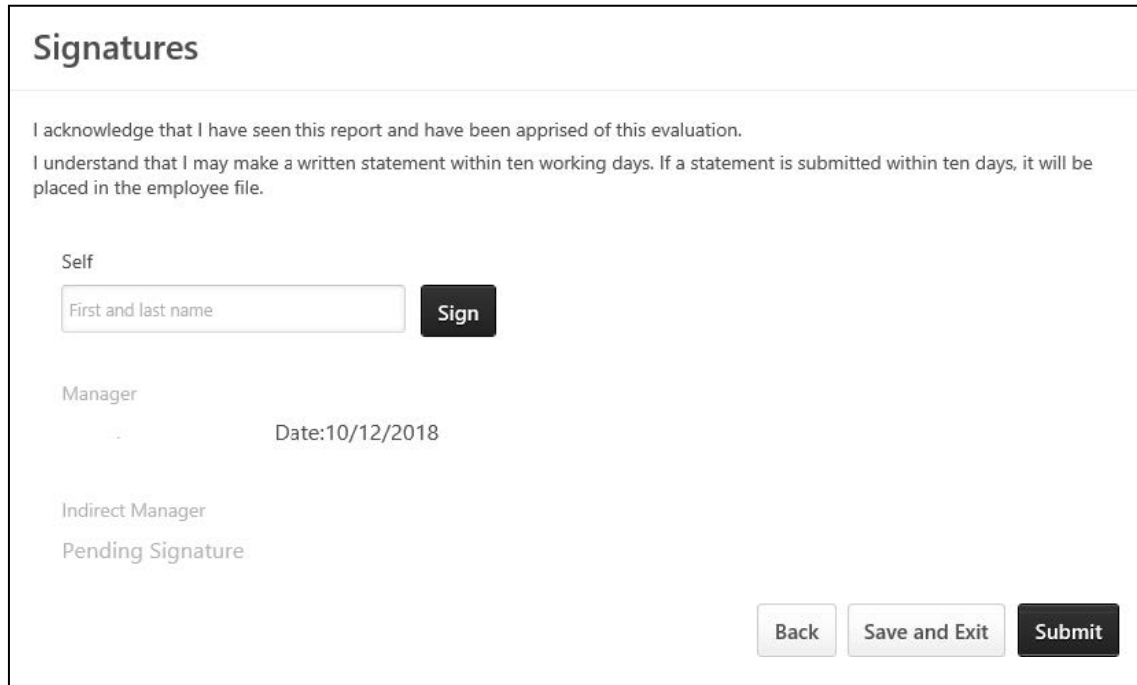
Get Started

15. Click “Get Started” and review each section.

16. Click Save and Continue through all the sections to view the scores and comments.

Signatures

17. Employee signs off and submits the form. Type your name in the signature box. Click Submit.



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 **Sign**

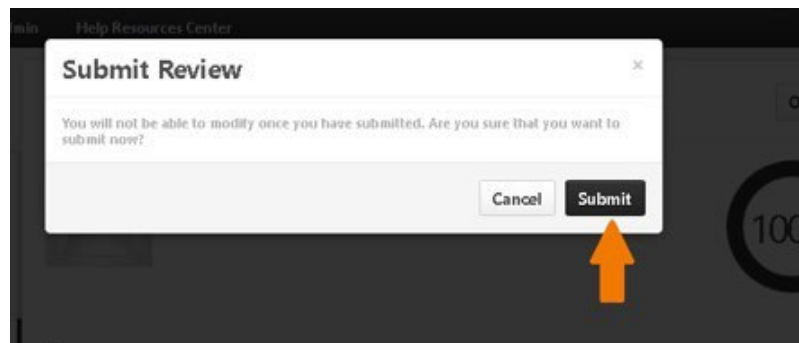
Manager Date: 10/12/2018

Indirect Manager

Pending Signature

Back Save and Exit Submit

- A window will pop up asking if you are sure you want to submit. Click Submit.



- An email will notify the next level manager to login to the talent.okstate website to complete their portion of the review.

18. The form auto-electronically goes to the Next Level Manager.

- The Next Level Manager opens the form and can go through the complete form to see the employee and supervisor comments and scores.

- Next Level Manager signs off and submits the form. Type their name in the signature box. Click Submit.

The Form auto-electronically goes to Human Resources. The Employee can view that review any time from the Performance Review tab in the talent.okstate.edu site.

If you have any questions or need help, please contact HR by call 918-594-8221 or email tulsa.hr@okstate.edu.