

How to Guide:  
**CSEA**  
**PERFORMANCE PROGRAM,  
6 MONTH RECERTIFICATION,  
EVALUATION/APPRAISAL**

**\*EMPLOYEE VIEW\***

Hirezon/Interview Exchange  
Performance Review Module



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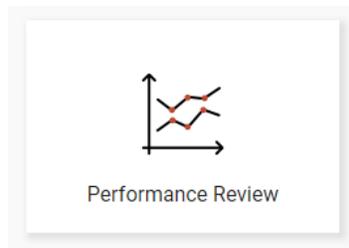
## Login to Interview Exchange

1. [Click here](#) to sign into Hirezon/Interview Exchange using single sign on. If you do use the [old link](#) it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).
2. You will then enter your Laker NetID and password, click Login and it will direct you to the main Hirezon/Interview Exchange page.

\*\*For department Hirezon/Interview Exchange accounts you will continue to login the same way you currently do using the [old link](#) and your Interview Exchange department email and associated password.

*Note: If you have a non-Oswego email address you will continue to login with your individual Hirezon/Interview Exchange account credentials (email address and associated password) through [this link](#).*

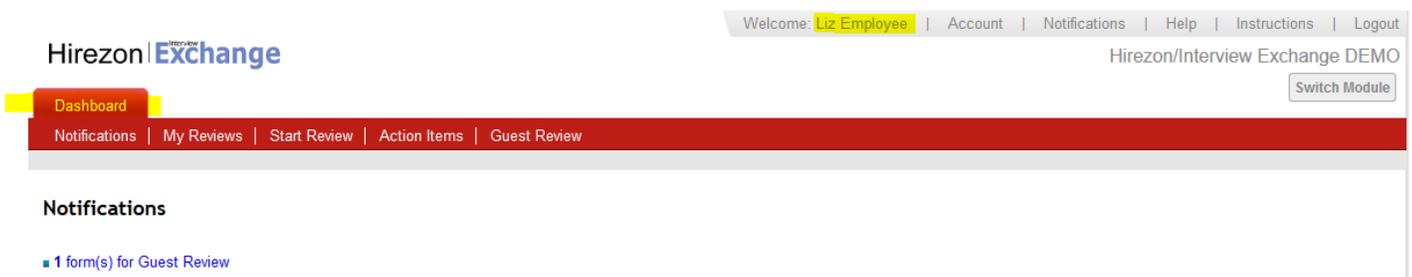
3. Click on this icon:



4. This will bring you to your main Dashboard.

## Dashboard

### **Employee View**

A screenshot of the Hirezon Interview Exchange Employee View Dashboard. The top navigation bar is light gray and contains the text "Welcome: Liz Employee" followed by links for "Account", "Notifications", "Help", "Instructions", and "Logout". The main header area is white and features the "Hirezon Interview Exchange" logo on the left and "Hirezon/Interview Exchange DEMO" on the right, with a "Switch Module" button below it. A red navigation bar contains the following links: "Dashboard" (highlighted in yellow), "Notifications", "My Reviews", "Start Review", "Action Items", and "Guest Review". Below the navigation bar, the "Notifications" section is visible, showing a notification: "1 form(s) for Guest Review".

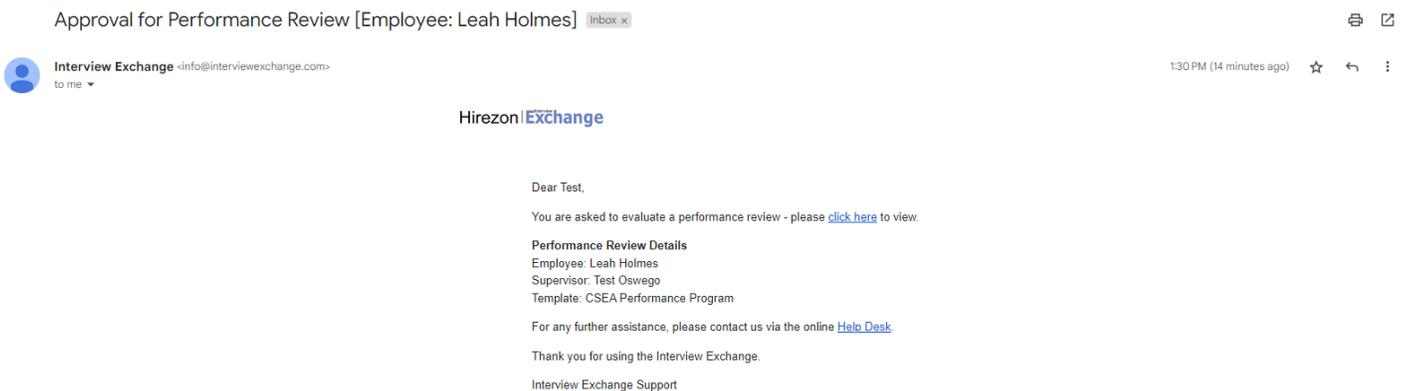
## Employee Dashboard Tabs

	Description
Dashboard	Your personalized landing page after login.
Notifications	Displays all pending work.
My Reviews	Displays your Evaluation Form(s) and review(s)
Start Review	This page displays only when self-appraisal feature is enabled in your account. Appropriate template Forms are available <i>via</i> Template lists and are originally created by your HR Admin user.
Action items	Displays all Forms for your review, completed reviews(history) and to be completed (task is not assigned to you at this time- Routing in Progress)
Guest Review	Displays any new Forms that need your attention, e.g., you may have been invited to review an evaluation Form as 360 Guest Reviewer.
Account	Displays user account details.
Notifications	Users can follow Instruction details of how to complete evaluation.
Help	To contact Support team for technical assistance.
Instructions	Users can view a copy of all system emails sent to them (assigned emails, etc.)
Log out	Ends account session.
Switch Module**	You can switch back to Applicant Tracking primary system module (if applicable) and vice versa without login credentials.

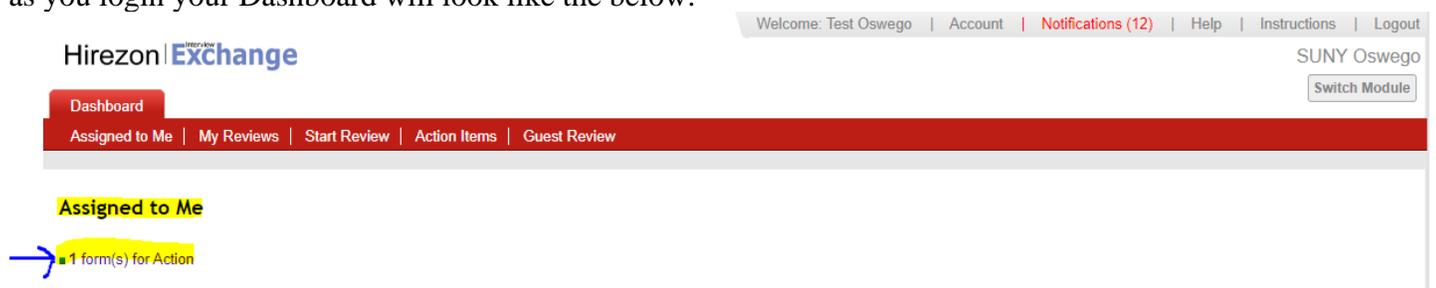
\*\* Not available to all users.

## How to Review/Acknowledge Your Performance Program

1.) You will receive an email notification once your supervisor sends you the CSEA performance program they have prepared:



2.) Login to your Hirezon/Interview Exchange account and go into the Performance Review module. As soon as you login your Dashboard will look like the below:



3.) Click on the form that needs action, the forms that need review will drop down with information:

Forms for Review

EMPLOYEE	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego	Leah Holmes	06/08/2023 01:55 PM EST	06/08/2023 01:58 PM EST	---	Routing - In-Progress

Upcoming Forms for Review

Reviewed Forms

4.) Click on your name in blue under Employee, the CSEA Performance Program form will pop up:

Performance Review
Print | Refresh

**SUNY Oswego**

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**Employee:** Leah Holmes

**Position:** Administrative Assistant

**Supervisor:** Test Oswego

**Created:** 06/12/2023 12:19 PM EST

**Review Period:** Year 2023

**Department:** Career Services

**Discussions:** 1

**Completed:** ---

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**Instructions**

Supervisor: Complete all sections below (Section 1: Employee Identification, Section 2A: Performance Program) and setup the Task Routing annually for all employees. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss the performance program before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the performance program, submit the performance program to Human Resources to be filed in the employee's personnel file. After HR acknowledges the performance program, the final copy will be in your dashboard when you log back into your account.

Employee: You will receive an email to review the performance program that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the performance program. You can then either return the performance program back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the performance program before electronically acknowledging receipt and submitting. After HR acknowledges the performance program, the final copy will be in your dashboard when you log back into your account.

5.) Review the CSEA Performance Program. You will have two options:

a.) **Acknowledge Receipt**- which means you have acknowledged your performance program for this coming year, and it will go to your supervisor for them to acknowledge and pass along to the HR Office to finalize into your personnel file.

b.) **Return to Supervisor**- if you'd like to make comments throughout your performance program and

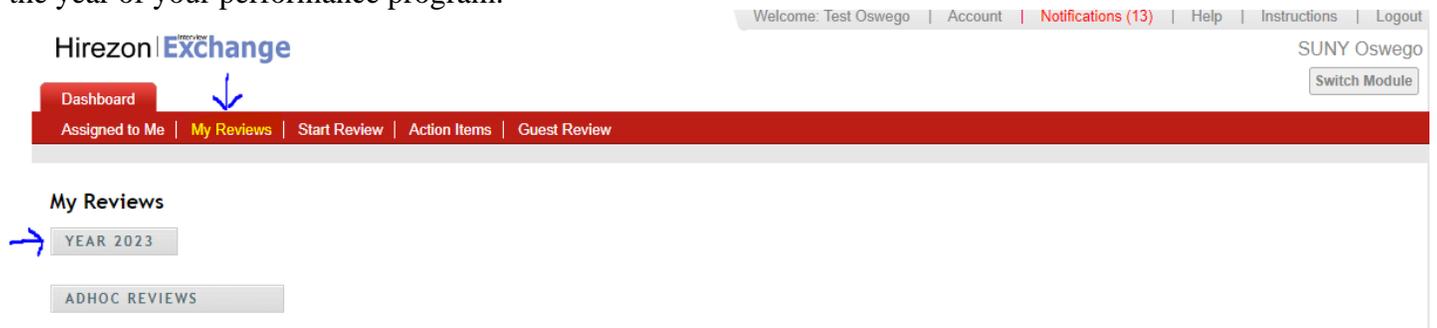
any suggested changes for your supervisor to review you can go ahead and add those by clicking on any of the gray talking bubbles  that are throughout the performance program. Click on one of those and you can start a discussion and save. Your supervisor will then be able to read those. Once you are finished making comments/suggestions click on the Return to Supervisor button at the bottom.

i.) If you do return to your supervisor, they will review the performance program and your comments/suggestions. Once they are finished and sent back to you, you will receive another email notification to let you know it's ready for your review. Follow the same steps as above until you have acknowledged receipt.

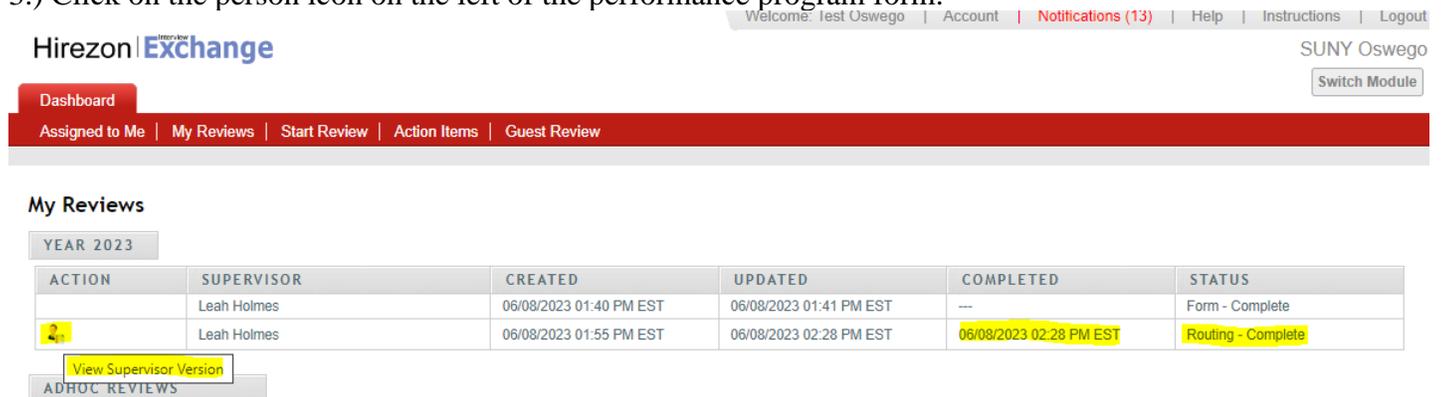
*\*Note: all discussions/comments made within the performance program will become a permanent part of the performance program file.*

### How to Find Completed Performance Program

- 1.) Once your performance program has been acknowledged by yourself, your supervisor, and the HR Office, you will receive an email notification that your performance program is complete.
- 2.) Login to your Hirezon/Interview Exchange account and click on My Reviews tab on your Dashboard, then the year of your performance program:



- 3.) Click on the person icon on the left of the performance program form:



- 4.) The final performance program will pop up. You can then download into a PDF and save for your own records with all acknowledgments documented:

Performance Review



**CSEA Performance Program** SUNY Oswego

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<b>Employee:</b>	Leah Holmes	<b>Review Period:</b>	Year 2023
<b>Position:</b>	Administrative Assistant	<b>Department:</b>	Career Services
<b>Supervisor:</b>	Test Oswego	<b>Discussions:</b>	1
<b>Created:</b>	06/12/2023 12:19 PM EST	<b>Completed:</b>	---

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**Instructions**

Supervisor: Complete all sections below (Section 1: Employee Identification, Section 2A: Performance Program) and setup the Task Routing annually for all employees. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss the performance program before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the performance program, submit the performance program to Human Resources to be filed in the employee's personnel file. After HR acknowledges the performance program, the final copy will be in your dashboard when you log back into your account.

Employee: You will receive an email to review the performance program that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the performance program. You can then either return the performance program back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the performance program before electronically acknowledging receipt and submitting. After HR acknowledges the performance program, the final copy will be in your dashboard when you log back into your account.

## How to Review/Acknowledge Your 6 Month Recertification

1.) You will receive an email notification once your supervisor sends you the CSEA 6 Month Recertification they have prepared:

Hirezon | powered by Exchange

Dear Leah,

You are asked to evaluate a performance review - please [click here](#) to view.

**Performance Review Details**

Employee: Leah Holmes

Supervisor: Test Oswego

Template: CSEA 6 Month Recertification

For any further assistance, please contact us via the online [Help Desk](#).

Thank you for using the Interview Exchange.

Interview Exchange Support

2.) Login to your Hirezon/Interview Exchange account and go into the Performance Review module. As soon as you login your Dashboard will look like the below:

Assigned to Me

→ 1 form(s) for Action

3.) Click on the form that needs action, the forms that need review will drop down with information:

Forms for Review

EMPLOYEE	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego	Leah Holmes	06/08/2023 01:55 PM EST	06/08/2023 01:58 PM EST	---	Routing - In-Progress

Upcoming Forms for Review

Reviewed Forms

4.) Click on your name in blue under Employee, the CSEA 6 Month Recertification form will pop up:

Performance Review



SUNY Oswego

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**CSEA 6 Month Recertification**

<b>Employee:</b>	Leah Holmes	<b>Review Period:</b>	Year 2023
<b>Position:</b>	Administrative Assistant	<b>Department:</b>	Career Services
<b>Supervisor:</b>	Test Oswego	<b>Discussions:</b>	0
<b>Created:</b>	06/12/2023 12:56 PM EST	<b>Completed:</b>	---

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**Instructions**

Supervisor: Complete all sections below- Section 1: Employee Identification, Section 2A: Performance Program (you can copy the task expectations from the performance program you already completed six months ago), Section 3: Six Month Recertification and setup the Task Routing by the approximate midpoint of the employee's performance program. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss any changes in tasks and proposed rating before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the performance program/proposed rating, submit the six-month recertification to Human Resources to be filed in the employee's personnel file. After HR acknowledges the six-month recertification, the final copy will be in your dashboard when you log back into your account.

Employee: You will receive an email to review the six-month recertification that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the performance program/proposed rating. You can then either return the six-month recertification back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the performance program/proposed rating before electronically acknowledging receipt and submitting. After HR acknowledges the six-month recertification, the final copy will

5.) Review the CSEA 6 Month Recertification. You will have two options:

a.) **Acknowledge Receipt**- which means you have acknowledged your CSEA 6 Month Recertification for mid-year, and it will go to your supervisor for them to acknowledge and pass along to the HR Office to finalize into your personnel file.

b.) **Return to Supervisor**- if you'd like to make comments throughout your 6 Month Recertification and any suggested changes for your supervisor to review you can go ahead and add those by clicking

on any of the gray talking bubbles  that are throughout the 6 Month Recertification Click on one of those and you can start a discussion and save. Your supervisor will then be able to read those. Once you are finished making comments/suggestions click on the Return to Supervisor button at the bottom.

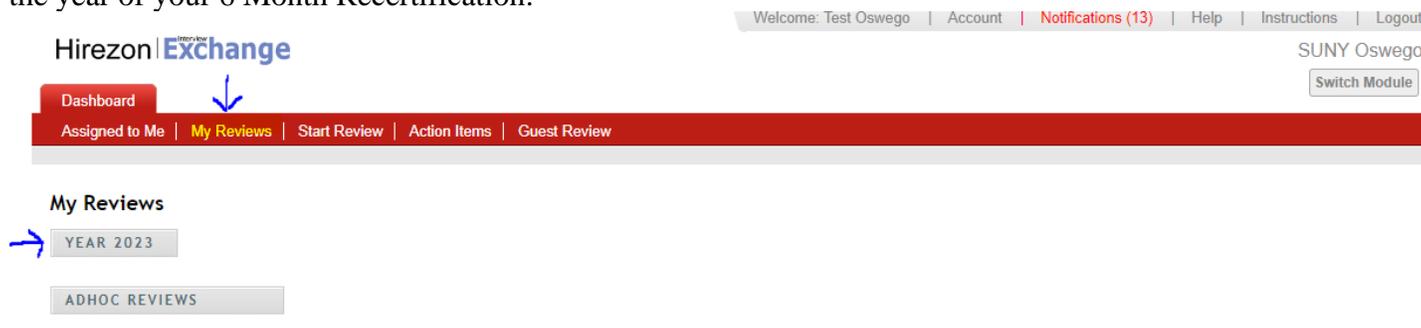
i.) If you do return to your supervisor, they will review the 6 Month Recertification and your comments/suggestions. Once they are finished and sent back to you, you will receive another email notification to let you know it's ready for your review. Follow the same steps as above until you have acknowledged receipt.

*\*Note: all discussions/comments made within the 6 Month Recertification will become a permanent part of the file.*

### How to Find Completed 6 Month Recertification

1.) Once your 6 Month Recertification has been acknowledged by yourself, your supervisor, and the HR Office, you will receive an email notification that your 6 Month Recertification is complete.

2.) Login to your Hirezon/Interview Exchange account and click on My Reviews tab on your Dashboard, then the year of your 6 Month Recertification:



The screenshot shows the Hirezon Exchange dashboard. At the top, there is a navigation bar with 'Welcome: Test Oswego | Account | Notifications (13) | Help | Instructions | Logout'. Below this is the 'Hirezon Exchange' logo and 'SUNY Oswego' with a 'Switch Module' button. The main navigation bar includes 'Dashboard', 'Assigned to Me', 'My Reviews', 'Start Review', 'Action Items', and 'Guest Review'. Under 'My Reviews', there is a dropdown menu for 'YEAR 2023' and a button for 'ADHOC REVIEWS'.

3.) Click on the person icon on the left of the 6 Month Recertification form:



The screenshot shows the 6 Month Recertification form. At the top, there is a navigation bar with 'Welcome: Test Oswego | Account | Notifications (13) | Help | Instructions | Logout'. Below this is the 'Hirezon Exchange' logo and 'SUNY Oswego' with a 'Switch Module' button. The main navigation bar includes 'Dashboard', 'Assigned to Me', 'My Reviews', 'Start Review', 'Action Items', and 'Guest Review'. Under 'My Reviews', there is a dropdown menu for 'YEAR 2023' and a button for 'ADHOC REVIEWS'. Below this is a table with the following data:

ACTION	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
	Leah Holmes	06/08/2023 01:40 PM EST	06/08/2023 01:41 PM EST	---	Form - Complete
	Leah Holmes	06/08/2023 01:55 PM EST	06/08/2023 02:28 PM EST	06/08/2023 02:28 PM EST	Routing - Complete

Below the table, there is a button for 'View Supervisor Version' and a button for 'ADHOC REVIEWS'.

4.) The final 6 Month Recertification will pop up. You can then download into a PDF and save for your own records with all acknowledgments documented:

**Performance Review**

**OSWEGO**  
STATE UNIVERSITY OF NEW YORK

**CSEA 6 Month Recertification** SUNY Oswego

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<b>Employee:</b>	Leah Holmes	<b>Review Period:</b>	Year 2023
<b>Position:</b>	Administrative Assistant	<b>Department:</b>	Career Services
<b>Supervisor:</b>	Test Oswego	<b>Discussions:</b>	0
<b>Created:</b>	06/12/2023 12:56 PM EST	<b>Completed:</b>	---

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**Instructions**

**Supervisor:** Complete all sections below- Section 1: Employee Identification, Section 2A: Performance Program (you can copy the task expectations from the performance program you already completed six months ago), Section 3: Six Month Recertification and setup the Task Routing by the approximate midpoint of the employee's performance program. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss any changes in tasks and proposed rating before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the performance program/proposed rating, submit the six-month recertification to Human Resources to be filed in the employee's personnel file. After HR acknowledges the six-month recertification, the final copy will be in your dashboard when you log back into your account.

**Employee:** You will receive an email to review the six-month recertification that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the performance program/proposed rating. You can then either return the six-month recertification back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the performance program/proposed rating before electronically acknowledging receipt and submitting. After HR acknowledges the six-month recertification, the final copy will

## How to Review/Acknowledge Your CSEA Annual Evaluation/Appraisal

1.) You will receive an email notification once your supervisor sends you the CSEA Annual Evaluation/Appraisal they have prepared:

Hirezon | **Exchange**

Dear Leah,

You are asked to evaluate a performance review - please [click here](#) to view.

**Performance Review Details**

Employee: Leah Holmes

Supervisor: Test Oswego

Template: CSEA Annual Evaluation/Appraisal

For any further assistance, please contact us via the online [Help Desk](#).

Thank you for using the Interview Exchange.

Interview Exchange Support

2.) Login to your Hirezon/Interview Exchange account and go into the Performance Review module. As soon as you login your Dashboard will look like the below:

3.) Click on the form that needs action, the forms that need review will drop down with information:

EMPLOYEE	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego	Leah Holmes	06/08/2023 01:55 PM EST	06/08/2023 01:58 PM EST	---	Routing - In-Progress

Upcoming Forms for Review  
 Reviewed Forms

4.) Click on your name in blue under Employee, the CSEA Annual Evaluation/Appraisal form will pop up:

**Employee:** Leah Holmes      **Review Period:** Year 2023  
**Position:** Administrative Assistant      **Department:** Career Services  
**Supervisor:** Test Oswego      **Discussions:** 0  
**Created:** 06/12/2023 01:54 PM EST      **Completed:** ---

**Instructions**  
**Supervisor:** Complete all sections below- Section 1: Employee Identification, Section 2A: Performance Program, Section 2B: Performance Appraisal, Section 4: Supervisor's Comments, Section 5: Performance Rating (any section you have completed previously you can copy from the last form) and setup the Task Routing annually for all employees. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss the evaluation/appraisal before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the evaluation/appraisal, submit to Human Resources to be filed in the employee's personnel file. After HR acknowledges the evaluation/appraisal, the final copy will be in your dashboard when you log back into your account.

**Employee:** You will receive an email to review the evaluation/appraisal that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the evaluation/appraisal. You can then either return it back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the evaluation/appraisal before electronically acknowledging receipt and submitting. After HR acknowledges the evaluation/appraisal, the final copy will be in your dashboard when you log back into your account.

5.) Review the CSEA Annual Evaluation/Appraisal. You will have two options:

a.) **Acknowledge Receipt**- which means you have acknowledged your CSEA Annual Evaluation/Appraisal for the current year, and it will go to your supervisor for them to acknowledge and pass along to the HR Office to finalize into your personnel file.

b.) **Return to Supervisor**- if you'd like to make comments throughout your CSEA Annual Evaluation/Appraisal and any suggested changes for your supervisor to review you can go ahead and add those by clicking on any of the gray talking bubbles  that are throughout the CSEA Annual Evaluation/Appraisal. Click on one of those and you can start a discussion and save. Your supervisor will then be able to read those. Once you are finished making comments/suggestions click on the Return to Supervisor button at the bottom.

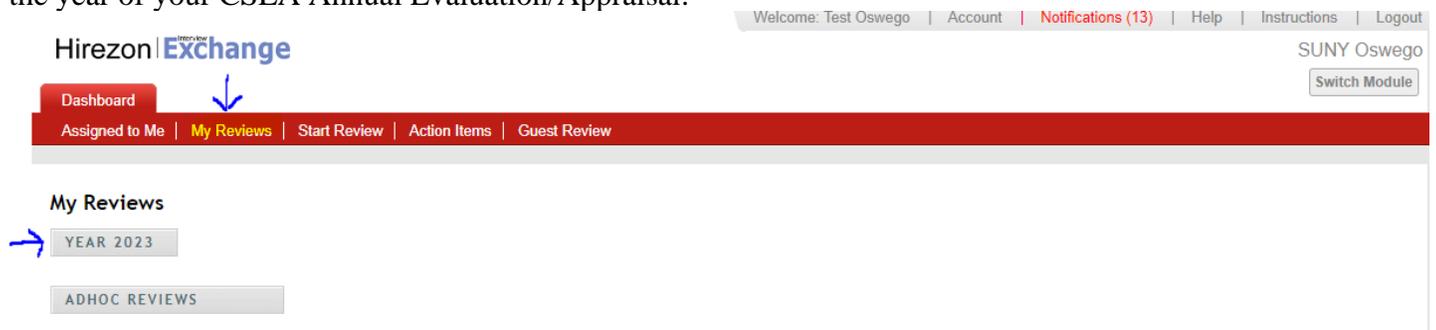
i.) If you do return to your supervisor, they will review the CSEA Annual Evaluation/Appraisal and your comments/suggestions. Once they are finished and sent back to you, you will receive another email notification to let you know it's ready for your review. Follow the same steps as above until you have acknowledged receipt.

*\*Note: all discussions/comments made within the CSEA Annual Evaluation/Appraisal will become a permanent part of the file.*

### How to Find Completed CSEA Annual Evaluation/Appraisal

1.) Once your CSEA Annual Evaluation/Appraisal has been acknowledged by yourself, your supervisor, and the HR Office, you will receive an email notification that your CSEA Annual Evaluation/Appraisal is complete.

2.) Login to your Hirezon/Interview Exchange account and click on My Reviews tab on your Dashboard, then the year of your CSEA Annual Evaluation/Appraisal:



The screenshot shows the Hirezon/Interview Exchange dashboard. At the top, there is a navigation bar with links for "Welcome: Test Oswego", "Account", "Notifications (13)", "Help", "Instructions", and "Logout". The user is identified as "SUNY Oswego" and there is a "Switch Module" button. The main navigation bar includes "Dashboard", "Assigned to Me", "My Reviews" (highlighted with a blue arrow), "Start Review", "Action Items", and "Guest Review". Below this, the "My Reviews" section is active, showing a dropdown menu for "YEAR 2023" (with a blue arrow pointing to it) and a button for "ADHOC REVIEWS".

3.) Click on the person icon on the left of the CSEA Annual Evaluation/Appraisal form:

My Reviews

YEAR 2023

ACTION	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
	Leah Holmes	06/08/2023 01:40 PM EST	06/08/2023 01:41 PM EST	---	Form - Complete
2	Leah Holmes	06/08/2023 01:55 PM EST	06/08/2023 02:28 PM EST	06/08/2023 02:28 PM EST	Routing - Complete

View Supervisor Version

ADHUC REVIEWS

4.) The final CSEA Annual Evaluation/Appraisal pop up. You can then download into a PDF and save for your own records with all acknowledgments documented:

Performance Review



SUNY Oswego

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**CSEA Annual Evaluation/Appraisal**

<b>Employee:</b> Leah Holmes	<b>Review Period:</b> Year 2023
<b>Position:</b> Administrative Assistant	<b>Department:</b> Career Services
<b>Supervisor:</b> Test Oswego	<b>Discussions:</b> 0
<b>Created:</b> 06/12/2023 01:54 PM EST	<b>Completed:</b> ---

---

**Instructions**

**Supervisor:** Complete all sections below- Section 1: Employee Identification, Section 2A: Performance Program, Section 2B: Performance Appraisal, Section 4: Supervisor's Comments, Section 5: Performance Rating (any section you have completed previously you can copy from the last form) and setup the Task Routing annually for all employees. Once you have completed the form, click send for routing at the bottom (the form will then go to the employee for review). Set up a time to meet with the employee in-person/virtually to review and discuss the evaluation/appraisal before submitting to Human Resources. Once you have reviewed with the employee and the employee electronically acknowledges receipt of the evaluation/appraisal, submit to Human Resources to be filed in the employee's personnel file. After HR acknowledges the evaluation/appraisal, the final copy will be in your dashboard when you log back into your account.

**Employee:** You will receive an email to review the evaluation/appraisal that was prepared by your supervisor. You will be given the option to make comments and suggested changes on the evaluation/appraisal. You can then either return it back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit. Please meet with your supervisor in-person/virtually to review and discuss the evaluation/appraisal before electronically acknowledging receipt and submitting. After HR acknowledges the evaluation/appraisal, the final copy will be in your dashboard when you log back into your account.

FAQ's & Useful Information

Please visit the Hirezon/Interview Exchange user manual for FAQ's and useful information within the performance module: <https://support.interviewexchange.com/articles/#!hirezon-performance/useful-information>.

*\* If your title is incorrect next to your name, you must log in to your Interview Exchange account and edit profile to update your title to your current title.*