

How to Guide: PROFESSIONAL EMPLOYEE PERFORMANCE PROGRAM & EVALUATION *EMPLOYEE VIEW*

Hirezon/Interview Exchange Performance Review Module



October 2023

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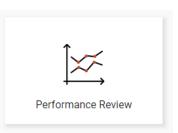
Login to Interview Exchange

- 1. <u>Click here</u> to sign into Hirezon/Interview Exchange using single sign on. If you do use the <u>old</u> <u>link</u> 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 <u>old link</u> 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.

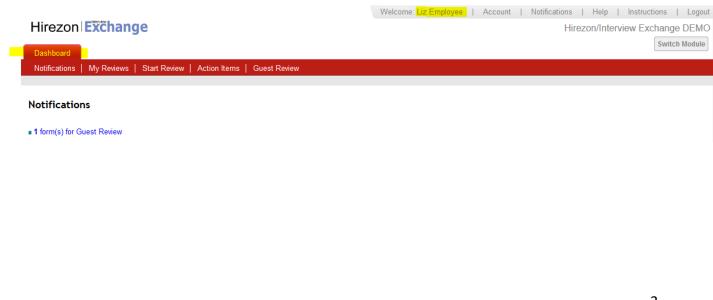
3. Click on this icon:



4. This will bring you to your main Dashboard.

Dashboard

Employee View



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 via 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 performance program they have prepared:

Approval for Performance Review [Employee: Test Oswego] International Internationa International International International International Int			8	Ø
Interview Exchange <info@interviewexchange.com> to me ▼</info@interviewexchange.com>	2:58 PM (O minutes ago)	☆	¢	:
HirezonlExchange				
Dear Test, You are asked to evaluate a performance review - please <u>click here</u> to view. Performance Review Details Employee: Test Oswego Supervisor: Leah Holmes Template: Professional Employee Performance Program For any further assistance, please contact us via the online <u>Help Deak</u> . 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:

	Welcome: Test Oswego Account Notifications (12) Help Instructions Logout
Hirezon Exchange	SUNY Oswego
Dashboard	Switch Module
Assigned to Me My Reviews Start Review Action Items Guest Review	
Assigned to Me	
■ 4 form(s) for Action	
	4

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

			Welcome: Test Oswego Acc	ount Notifications (12)	
Hirezon Exc	change		10000000. 1000 0000 3 0 1 1 1000		SUNY Osw
	j-				Switch Mod
Dashboard	A Destaura I. Obert Destaura I. Antine Room	- Curret Davidaria			
Assigned to Me N	Ay Reviews Start Review Action Item	s Guest Review			
orms for Revie	ew				
EMPLOYEE	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego	Leah Holmes	06/08/2023 01:55 PM ES	06/08/2023 01:58 PM EST		Routing - In-Progress
Upcoming F	orms for <mark>R</mark> eview				
Reviewed Fo	orms				
		n Emailarua a dha mar			
) CIICK OII y Performance Revie	our name in blue unde	r Employee, the per	formance program	orm will pop up	:
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					🖶 🔁
					₽ 🔁
OSWE		D			SUNY Osusara
state UNIVERSITY	Employee Performance	Program			SUNY Oswego
	Employee Performance	Program Review Period:	Year 2023		SUNY Oswego
Employee:		Review Period:			SUNY Oswego
Employee: Position:	Test Oswego Admissions Coordinator	Review Period: Department:	Admissions		SUNY Oswego
Employee: Position: Supervisor:	Test Oswego Admissions Coordinator Leah Holmes	Review Period: Department: Discussions:	Admissions		SUNY Oswego
Employee:	Test Oswego Admissions Coordinator	Review Period: Department:	Admissions		SUNY Oswego
mployee: Position: Supervisor: Preated:	Test Oswego Admissions Coordinator Leah Holmes	Review Period: Department: Discussions:	Admissions		SUNY Oswego
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imployee: Position: Supervisor: Created:	Test Oswego Admissions Coordinator Leah Holmes	Review Period: Department: Discussions: Completed:	Admissions O 	of a new hires start date an	
mployee: osition: upervisor: reated: structions <u>pervisor:</u> Comple	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST	Review Period: Department: Discussions: Completed:	Admissions Q tup Task Routing within 30 days		nd annually for current
Employee: Position: Supervisor: Created: Instructions Supervisor: Comple Inployees. Once yo	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST	Review Period: Department: Discussions: Completed:	Admissions tup Task Routing within 30 days tup Tork Routing within 30 days	oyee for review). Set up a t	nd annually for current time to meet with the
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Employee: Position: Supervisor: Preated: Astructions appervisor: Comple aployees. Once yo aployee in-person. aployee electronic	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST ete all sections below (Employee Data ou have completed the form, click ser /virtually to review and discuss the p	Review Period: Department: Discussions: Completed: A, Performance Program) and se and for routing at the bottom (the erformance program before sul formance program, submit the	Admissions Admissions tup Task Routing within 30 days the form will then go to the employment performance program to Human	oyee for review). Set up a t nce you have reviewed with Resources to be filed in th	nd annually for current time to meet with the h the employee and the
mployee: osition: upervisor: reated: ostructions pervisor: Comple uployees. Once yo aployee in-person. aployee electronic	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST ete all sections below (Employee Data ou have completed the form, click ser /virtually to review and discuss the p cally acknowledges receipt of the per	Review Period: Department: Discussions: Completed: A, Performance Program) and se and for routing at the bottom (the erformance program before sul formance program, submit the	Admissions Admissions tup Task Routing within 30 days the form will then go to the employment performance program to Human	oyee for review). Set up a t nce you have reviewed with Resources to be filed in th	nd annually for current time to meet with the h the employee and the
mployee: osition: upervisor: reated: structions pervisor: Comple nployees. Once yo nployee in-person. nployee electronic e. After HR acknow	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST ete all sections below (Employee Data ou have completed the form, click ser /virtually to review and discuss the p cally acknowledges receipt of the per	Review Period: Department: Discussions: Completed: a, Performance Program) and see and for routing at the bottom (the erformance program before sull formance program, submit the he final copy will be in your data	Admissions Admissions tup Task Routing within 30 days the form will then go to the employ bomitting to Human Resources. Or performance program to Human shboard when you log back into y	oyee for review). Set up a t nce you have reviewed with Resources to be filed in th your account.	nd annually for current time to meet with the h the employee and the ne employee's personnel
mployee: osition: upervisor: reated: structions pervisor: Comple aployee in-person. aployee electronic e. After HR acknow	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST ete all sections below (Employee Data ou have completed the form, click ser /virtually to review and discuss the p cally acknowledges receipt of the per wledges the performance program, th	Review Period: Department: Discussions: Completed: A, Performance Program) and se and for routing at the bottom (the erformance program before sull formance program, submit the he final copy will be in your das	Admissions Admissions Admissions Admissions atup Task Routing within 30 days tup Task Routing within 30 days the form will then go to the employ be form and the program to Human shooard when you log back into y ared by your supervisor. You will	oyee for review). Set up a t nce you have reviewed with Resources to be filed in th your account. be given the option to mak	nd annually for current time to meet with the h the employee and the he employee's personnel ke comments and
Employee: Position: Supervisor: Created: Instructions Inployees: Comple Inployees: Once yo Inployee in-person Inployee in-person Inployee in-person Inployee: You will Inployee: You will Inployee: You will	Test Oswego Admissions Coordinator Leah Holmes 06/08/2023 01:55 PM EST ete all sections below (Employee Data ou have completed the form, click ser /virtually to review and discuss the p cally acknowledges receipt of the per wledges the performance program, the receive an email to review the performance	Review Period: Department: Discussions: Completed: A, Performance Program) and set and for routing at the bottom (the erformance program before sul formance program, submit the he final copy will be in your das rmance program that was prepa- then either return the perform	Admissions	oyee for review). Set up a f nee you have reviewed with Resources to be filed in th your account. be given the option to make ervisor for a second review.	nd annually for current time to meet with the h the employee and the ne employee's personnel ke comments and /ability to make changes

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5.) Review the performance program. You will have two options:

account.

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.

**If the supervisor and employee do not concur on the performance program, the employee has the right to provide a statement along with the performance program within ten (10) working days of receipt. As the employee, if you would like to provide a statement you have two options. You may write your statement in the comments box section before you click acknowledge receipt OR you may email the statement to your supervisor and Human Resources. Either way, the statement will be put into your personnel file with your performance program.

*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:

Performance Review Completed (External) Σ Inbox x			¢	ß
Interview Exchange <info@interviewexchange.com> to me •</info@interviewexchange.com>	3:29PM (2 minutes ago)	☆	4	:
HirezoniExcha	inge			
Supe Empli For a Than	User, formance review (Employee: Test Oswego) has completed routing. visors - please <u>click here</u> to view. ny further assistance, please contact us via the online <u>Help Desk</u> . « you for using the Interview Exchange. iew Exchange Support			

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

		Welcome: Test Oswego	Account	Notifications (13)	Help	Instructions Logout
	Hirezon Exchange					SUNY Oswego
	Dashboard					Switch Module
	Assigned to Me My Reviews Start Review Action Items Guest Review					
	My Reviews					
\rightarrow	YEAR 2023					
	ADHOC REVIEWS					
						6
						6

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

irezon 🗈	cchange				SUNY Osv
ashboard					Switch Mo
ssianed to Me	My Reviews Start Review A	ction Items Guest Review			
Reviews					
EAR 2023					
EAR 2023	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
	SUPERVISOR Leah Holmes	CREATED 06/08/2023 01:40 PM EST	UPDATED 06/08/2023 01:41 PM EST	COMPLETED	STATUS Form - Complete

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:

	i			
Professional	Employee Performance		SUNY Oswego	
Employee:	Test Oswego	Review Period:	Year 2023	
	Test Oswego Admissions Coordinator	Review Period: Department:	Year 2023 Admissions	
Employee: Position: Supervisor:	•			

Instructions

Supervisor: Complete all sections below (Employee Data, Performance Program) and setup Task Routing within 30 days of a new hires start date and annually for current 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 Evaluation

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

Interview Exchange <info@inter to me</info@inter 	viewexchange.com>		1:25 PM (26 minutes ago)	☆	¢	:
Hirezon	Exchange					
	Dear Test,					
	You are asked to evaluate a perfor	rmance review - please <u>click here</u>	to view.			
	Performance Review Details Employee: Test Oswego Supervisor: Leah Holmes Template: Professional Employee	Evaluation				
	For any further assistance, please	contact us via the online Help De	<u>əsk</u> .			
	Thank you for using the Interview	Exchange.				
	Interview Exchange Support					
2.) Login to your Hirezon/Inter as you login your Dashboard w	•	-				
Hirozon Ewebongo		Welcome: Test Oswego Account	Notifications (12) Help	Instruction	ns Lo	gout

Hirezon Exchange	SUNY Oswego
Dashboard	Switch Module
Assigned to Me My Reviews Start Review Action Items Guest Review	
Assigned to Me	
1 form(s) for Action	
3.) Click on the form that needs action, the forms that ne	ed review will drop down with information:
	Welcome: Test Oswego Account Notifications (12) Help Instructions Logout
Hirezon Exchange	SUNY Oswego

Dashboard Assigned to Me	My Reviews	Start Review	Action Items	Guest Review			Switch Modul
Forms for Rev	/iew						
EMPLOYEE		SUPERVIS	OR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego		Leah Holme	s	06/08/2023 01:55 PM EST	06/08/2023 01:58 PM EST		Routing - In-Progress
Upcoming	Forms for I	Review					
Reviewed	Forms						

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

Performance Review

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\nearrow	STATE		ERSIT	r OF		YORK

Professional Employee Evaluation

SUNY Oswego

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Employee:	Test Oswego	Review Period:	Year 2023
Position:	Admissions Coordinator	Department:	Admissions
Supervisor:	Leah Holmes	Discussions:	0
Created:	06/09/2023 12:10 PM EST	Completed:	

Instructions

Supervisor: Complete all sections below (Employee Data, Evaluation, Performance Rating) and setup Task Routing annually for all employees. Once you have completed the form, click Attach Past Reviews on the bottom and attach the performance program you are evaluating from, then 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 before submitting to Next Level Supervisor. Once you reviewed with the employee and the employee electronically acknowledged receipt, submit the evaluation to Next Level Supervisor. After HR acknowledges the evaluation, 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 that was prepared by your supervisor. You will be given the option to make comments throughout the evaluation and within the text box before you electronically acknowledge receipt of the evaluation. You can then either return the evaluation back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit forward. Please meet with your supervisor in-person/virtually to review and discuss the evaluation before electronically acknowledging receipt and submitting. After HR acknowledges the evaluation, the final copy will be in your dashboard when

5.) Review the evaluation. You will have two options:

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

b.) **Return to Supervisor**- if you'd like to make comments throughout your evaluation 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 evaluation. 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 evaluation and your comments/suggestions. Once they are finished and send 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.

**As the employee, if you would like to provide a statement along with your evaluation, you have two options. You may write your statement in the comments box section before you click acknowledge receipt OR you may email the statement to your supervisor and Human Resources. Either way, the statement will be put into your personnel file with your evaluation.

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

How to Find Completed Evaluation

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

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

, , , , , , , , , , , , , , , , , , ,	Welcome: Test Oswego Account Notifications (13) Help Instructions Logout
Hirezon Exchange	SUNY Oswego
Dashboard	Switch Module
Assigned to Me My Reviews Start Review Action Items Guest Review	
My Reviews	
YEAR 2023	
ADHOC REVIEWS	

3.) Click on the person icon on the left of the evaluation form:

Hirezon E	xchange				SUNY Oswe
Dashboard					Switch Mode
Assigned to Me	My Reviews Start Review A	ction Items Guest Review			
Ay Reviews					
Ay Reviews					
•	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
YEAR 2023	SUPERVISOR Leah Holmes	CREATED 06/08/2023 01:40 PM EST	UPDATED 06/08/2023 01:41 PM EST	COMPLETED	STATUS Form - Complete

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

				-
Professional	Employee Evaluation			SUNY Oswego
Employee:	Test Oswego	Review Period:	Year 2023	
Employee: Position:	Test Oswego Admissions Coordinator	Review Period: Department:	Year 2023 Admissions	
	0			

Instructions

Supervisor: Complete all sections below (Employee Data, Evaluation, Performance Rating) and setup Task Routing annually for all employees. Once you have completed the

FAQ's & Useful Information

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

* 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.