



How to Guide:

PROFESSIONAL EMPLOYEE PERFORMANCE PROGRAM & EVALUATION

SUPERVISOR VIEW

Hirezon/Interview Exchange
Performance Review Module



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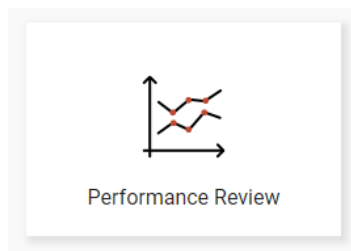
Login to Interview Exchange

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](#).

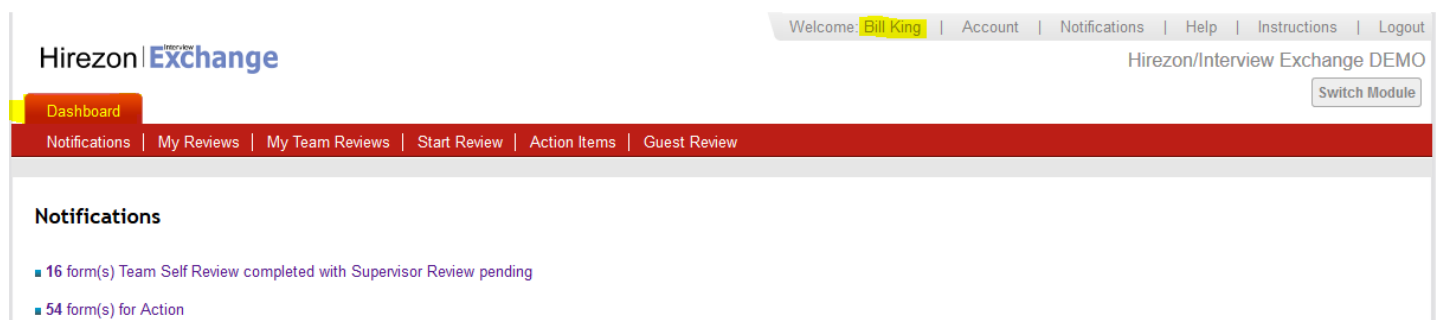
3. Click on this icon:



4. This will bring you to your main Dashboard.

Dashboard

Supervisor View

A screenshot of the Hirezon Interview Exchange Supervisor View Dashboard. The page has a white background with a red navigation bar at the top. The navigation bar contains the following items: "Dashboard" (highlighted in orange), "Notifications", "My Reviews", "My Team Reviews", "Start Review", "Action Items", and "Guest Review". The main content area is titled "Notifications" and contains two items: "16 form(s) Team Self Review completed with Supervisor Review pending" and "54 form(s) for Action". The top right corner of the page shows the user's name "Bill King" and links for "Account", "Notifications", "Help", "Instructions", and "Logout". The page title is "Hirezon/Interview Exchange DEMO" and there is a "Switch Module" button.

Supervisor Dashboard Tabs

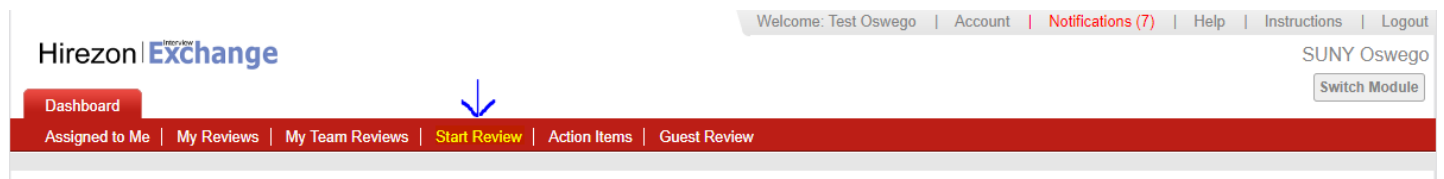
	Description
Dashboard	Your personalized landing page after login
Assigned to me	Displays all pending work.
My Reviews	Displays your Evaluation Form(s) and review(s)
My Team Reviews	Displays the Evaluation Form(s) and review(s) of your employees only.
Start Review	Enables you to create and customize an Evaluation Form for your employee. 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 view a copy of all system emails sent to them (assigned emails, etc.)
Help	To contact Support team for technical assistance.
Instructions	Users can follow Instruction details of how to complete evaluation.
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.

Supervisors have the **My Team Reviews tab to complete performance programs and evaluations on direct reports.*

How to Start New Performance Program

1.) Click on Start Review at the top of your dashboard:



It will then bring you to the following screen:

Create Performance Review

Review Type:	<input type="text" value="Select your option"/>
Employee:	<input type="text"/>
Position:	<input type="text"/>
Supervisor:	<input type="text"/>
Review Period:	<input type="text" value="--Select--"/>
Department:	<input type="text" value="--Select--"/>

[Create Form](#)

2.) Fill in all the requested information and click [Create Form](#):

Review Type: Will be Team Review when completing a form for a direct report.
Employee: Type in your direct reports name- they should auto populate, click on their name.

**If they do not auto populate that means they do not have access to the performance module- please contact hr@oswego.edu to request the access.*

***If the title of the employee is incorrect next to their name, the employee must log in to their Interview Exchange account and edit profile to update the title to their current title.*

Position: Type in your direct reports title.
Supervisor: Type in your name and it should auto populate, click on your name.
Review Period: Select the appropriate year for the performance program.
Department: Choose the department your direct report is located in the drop down.
Template: You will see all active templates- choose *Professional Employee Performance Program*.

Welcome: Test Oswego | Account | Notifications (7) | Help | Instructions | Logout

SUNY Oswego
Switch Module

Dashboard
Assigned to Me | My Reviews | My Team Reviews | Start Review | Action Items | Guest Review

Create Performance Review

Review Type: Team Review

Employee: Leah Holmes [Assistant Director of Human Resources] ✕

Position: Assistant Director of Human Resources

Supervisor: Test Oswego [Office of Human Resources] ✕

Review Period: Year 2023

Department: Human Resources

Template: Professional Employee Performance Program

[Create Form](#)

3.) The next screen will be the Professional Employee Performance Program form for you to complete.

**There are instructions at the top for your review.*

Welcome: Test Oswego | Account | Notifications (7) | Help | Instructions | Logout

SUNY Oswego
Switch Module

Dashboard
Assigned to Me | My Reviews | My Team Reviews | Start Review | Action Items | Guest Review

Leah Holmes

Position:	Assistant Director of Human Resources	Review Period:	Year 2023
Supervisor:	Test Oswego	Department:	Human Resources

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.

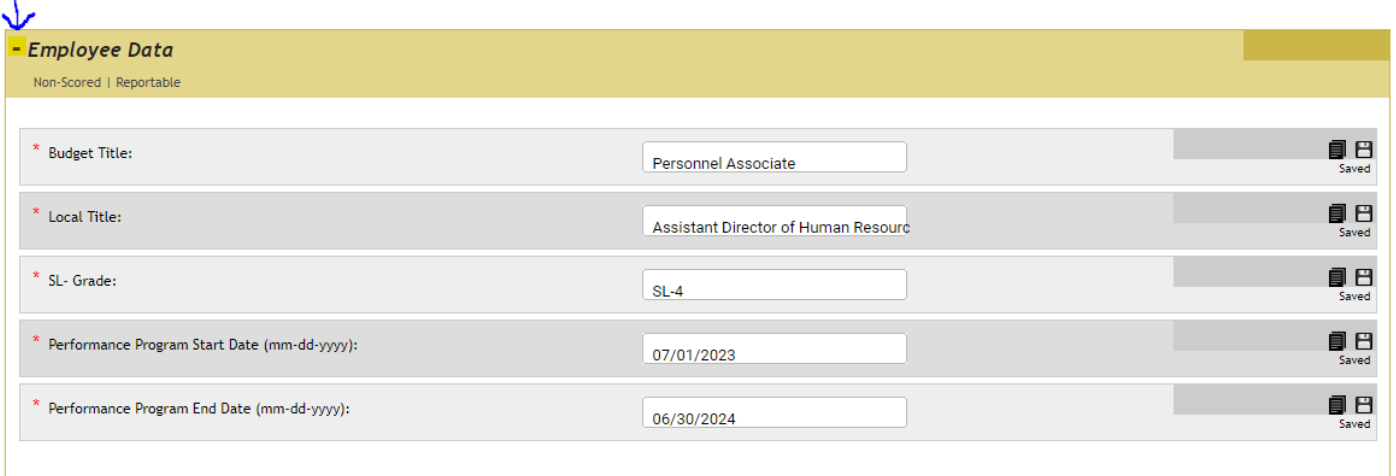
+ Employee Data
Non-Scored | Reportable

+ Performance Program
Non-Scored | Reportable

Complete Form

[View Form](#) [Clone](#) [Delete](#) [Attach Past Reviews](#)

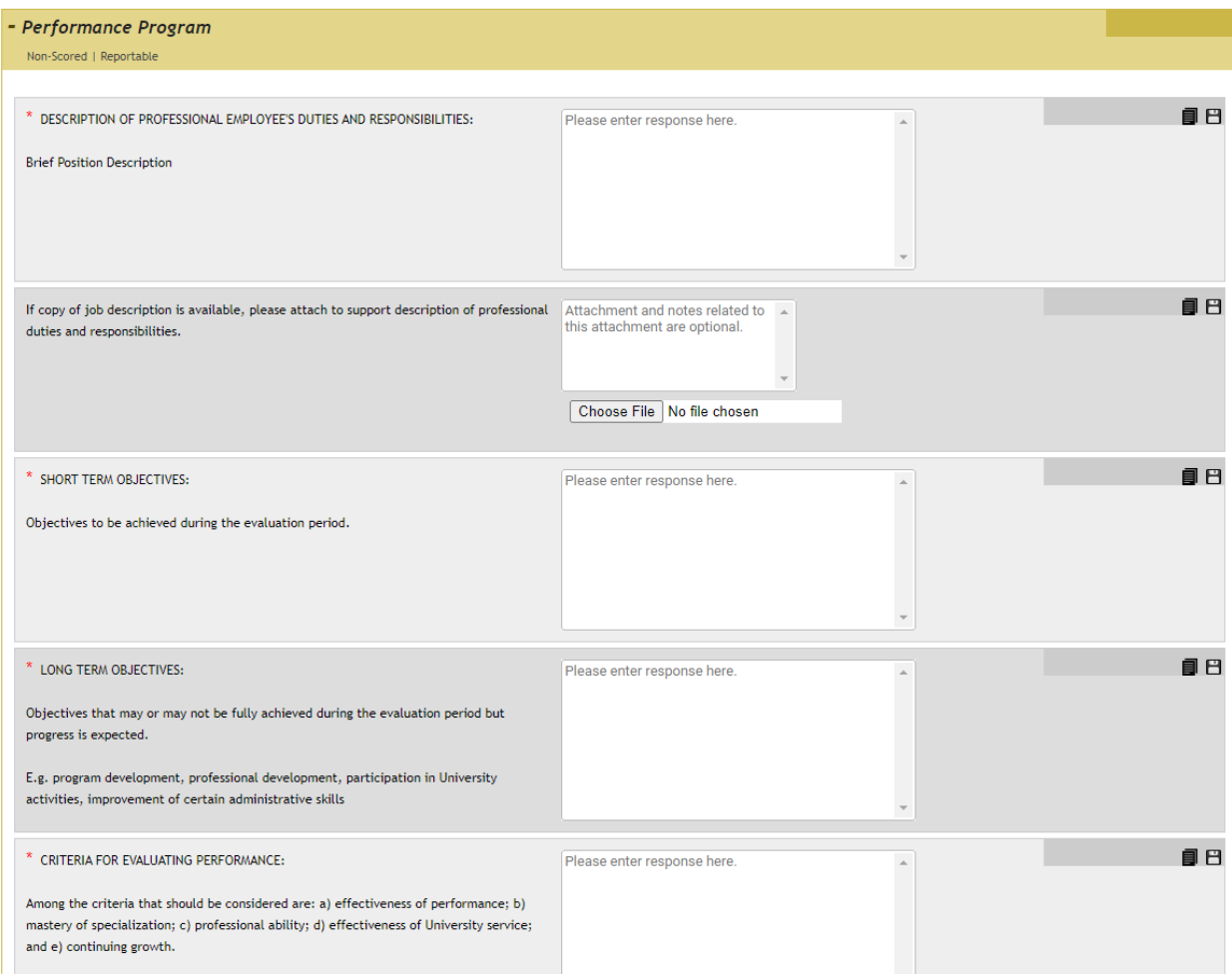
4.) Click on the + next to Employee Data and the form will drop down, complete the information required:



A screenshot of a web form titled "Employee Data" with a sub-header "Non-Scored | Reportable". The form contains five rows of input fields, each with a "Saved" button to its right. A blue arrow points to a plus sign on the left side of the form header.

Field Label	Value	Action
* Budget Title:	Personnel Associate	Saved
* Local Title:	Assistant Director of Human Resourc	Saved
* SL- Grade:	SL-4	Saved
* Performance Program Start Date (mm-dd-yyyy):	07/01/2023	Saved
* Performance Program End Date (mm-dd-yyyy):	06/30/2024	Saved

5.) Next, click on the + next to Performance Program and the form will drop down, complete the information required:



A screenshot of a web form titled "Performance Program" with a sub-header "Non-Scored | Reportable". The form contains five sections, each with a "Saved" button to its right.

- * DESCRIPTION OF PROFESSIONAL EMPLOYEE'S DUTIES AND RESPONSIBILITIES:** Brief Position Description. Text area with "Please enter response here." and a "Saved" button.
- If copy of job description is available, please attach to support description of professional duties and responsibilities.** Attachment and notes related to this attachment are optional. Includes a "Choose File" button and "No file chosen" text. "Saved" button.
- * SHORT TERM OBJECTIVES:** Objectives to be achieved during the evaluation period. Text area with "Please enter response here." and a "Saved" button.
- * LONG TERM OBJECTIVES:** Objectives that may or may not be fully achieved during the evaluation period but progress is expected. E.g. program development, professional development, participation in University activities, improvement of certain administrative skills. Text area with "Please enter response here." and a "Saved" button.
- * CRITERIA FOR EVALUATING PERFORMANCE:** Among the criteria that should be considered are: a) effectiveness of performance; b) mastery of specialization; c) professional ability; d) effectiveness of University service; and e) continuing growth. Text area with "Please enter response here." and a "Saved" button.

**The form is exactly the same as the paper version you are used to working with. There are no language changes.*

**Note: As you use this system year after year, content will be saved, and you will be able to simply copy over from year to year on items that have not changed. You can do this by clicking on the stack of papers icon next to the square save icon. There will be a list of content you can choose from that was used for the same employee previously.*

6.) Once you are finished entering all the information, click the Complete Form box at the bottom:



You will get this notification box:

www.interviewexchange.com says
Please make sure all your responses are final.
Click OK to complete form or Cancel to review and make changes.



You can go ahead and click OK.

7.) After you click OK, the next screen will be the routing list (who needs to see/acknowledge) this performance program:

The screenshot shows the Hirezon|Exchange interface. At the top, there is a navigation bar with links for 'Welcome: Test Oswego', 'Account', 'Notifications (3)', 'Help', 'Instructions', and 'Logout'. The user is identified as 'SUNY Oswego' with a 'Switch Module' button. Below the navigation bar is a red header with 'Dashboard' and a sub-menu with 'Assigned to Me', 'My Reviews', 'My Team Reviews', 'Start Review', 'Action Items', and 'Guest Review'. The main content area displays information for 'Leah Holmes':
Position: Admissions Coordinator
Supervisor: Test Oswego
Review Period: 2023 - 2024
Department: Admissions
Below this is a 'Routing List' section with the text: 'Employee: This is to signify that I have read and understand the above Performance Program.' A note follows: '*Note: If the supervisor and employee do not concur on the performance program, the employee has the right to provide their supervisor and Human Resources a statement within ten (10) working days of receipt that will be attached to the performance program. The employee can write their statement in the comments text box below before clicking acknowledge receipt OR they can email separately to their supervisor and Human Resources.' The routing list table is as follows:

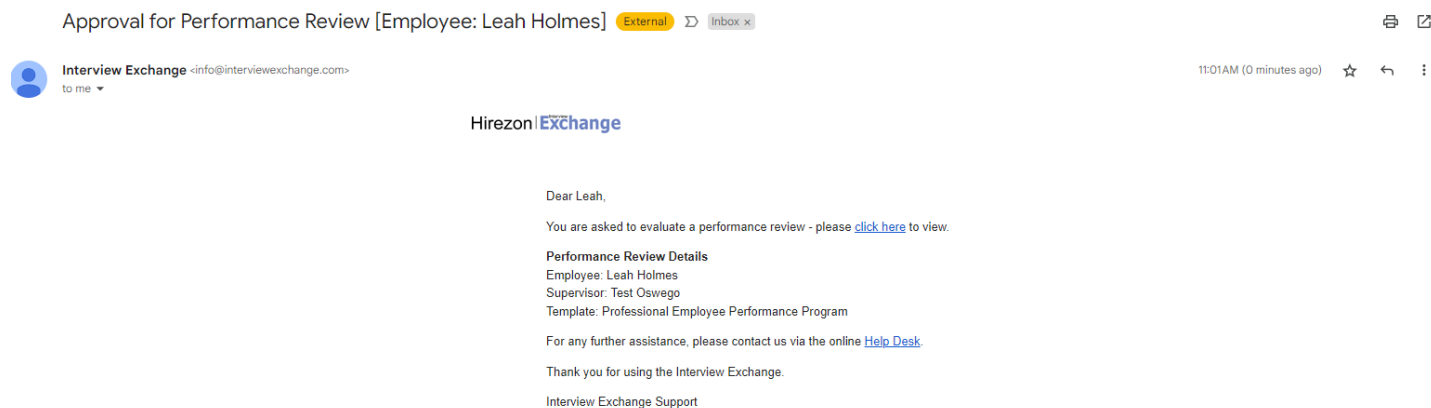
Order	Role	Name	Status	Action
1.	Employee	Leah Holmes	Not Sent	
2.	Immediate Supervisor	Please add a user.		
3.	HR / Personnel File	Human Resources	Not Sent	

At the bottom of the interface, there are four icons with labels: 'View Form', 'Send For Routing', 'Edit Form', and 'Clone'.

The employee (direct report) will be auto populated as the first person to review. As the immediate supervisor, you will add your name there by clicking on the pen and pencil icon on the right and click save. Then the last to receive will be the HR Office which is hard coded, and you will not need to do anything with.

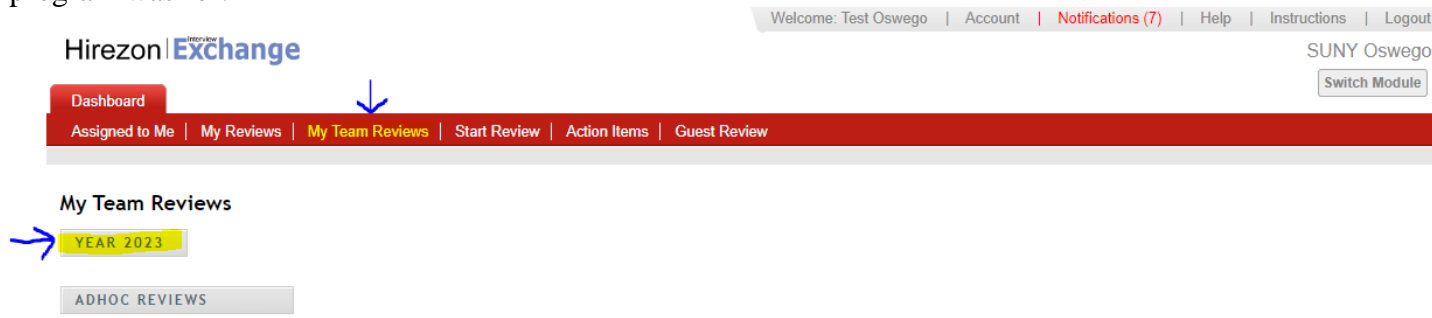
Once you have the routing list completed, click [Send for Routing](#) at the bottom.

8.) After you click Send for Routing, the employee (direct report) will receive an email notification letting them know they have a performance program to review in Hirezon/Interview Exchange from their supervisor:



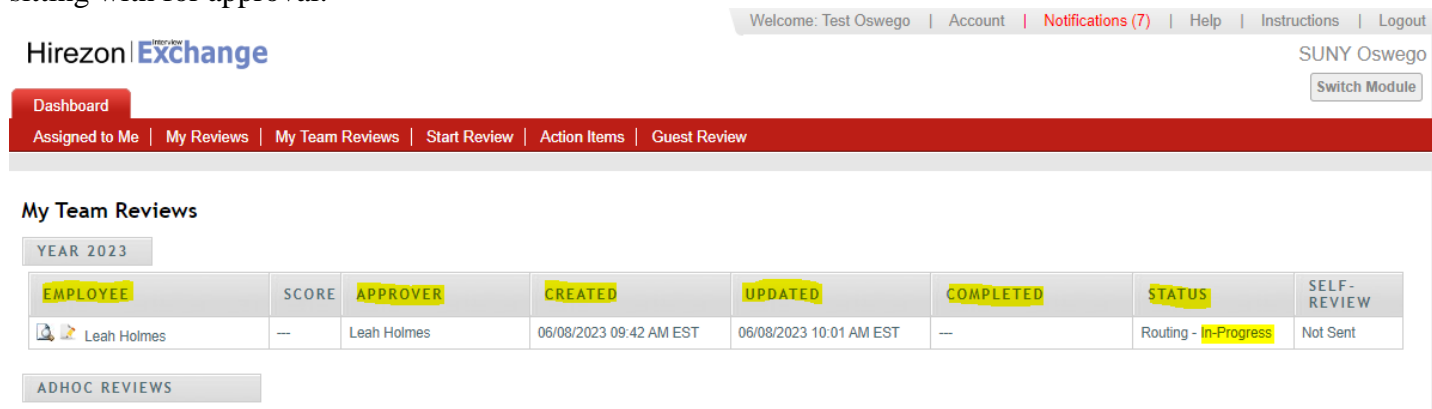
How to Find Direct Report Performance Programs in Process

1.) Click on My Team Reviews tab on the top of your Dashboard, then click on the year the performance program was for:



The screenshot shows the Hirezon Exchange dashboard. At the top right, there is a navigation bar with 'Welcome: Test Oswego', 'Account', 'Notifications (7)', 'Help', 'Instructions', and 'Logout'. Below this is the 'SUNY Oswego' logo and a 'Switch Module' button. The main navigation bar is red and contains 'Dashboard', 'Assigned to Me', 'My Reviews', 'My Team Reviews' (highlighted with a blue arrow), 'Start Review', 'Action Items', and 'Guest Review'. Below the navigation bar, the 'My Team Reviews' section is visible, with a dropdown menu for 'YEAR 2023' highlighted with a blue arrow. Below the dropdown is an 'ADHOC REVIEWS' button.

2.) The drop-down menu will give you information on what is in process and who the performance program is sitting with for approval:



The screenshot shows the Hirezon Exchange dashboard with the 'My Team Reviews' tab selected. The 'YEAR 2023' dropdown menu is open, showing a table of performance programs. The table has columns for EMPLOYEE, SCORE, APPROVER, CREATED, UPDATED, COMPLETED, STATUS, and SELF-REVIEW. The first row shows a performance program for Leah Holmes, with a score of ---, approved by Leah Holmes, created on 06/08/2023 09:42 AM EST, updated on 06/08/2023 10:01 AM EST, and a status of 'Routing - In-Progress'. The 'SELF-REVIEW' column shows 'Not Sent'. Below the table is an 'ADHOC REVIEWS' button.

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
Leah Holmes	---	Leah Holmes	06/08/2023 09:42 AM EST	06/08/2023 10:01 AM EST	---	Routing - In-Progress	Not Sent

a.) You can click on the paper with magnifying glass next to the employee's name to view the performance program. *You can download into a PDF or print if needed- if you'd like to bring a physical copy to the meeting with your employee. If you do this, please remember this is NOT the final copy. The final copy will not be until the employee, you and HR have approved/acknowledged in the system.

How to Review/Acknowledge Direct Report Performance Program

1.) You will receive an email notification once your direct report has either approved/acknowledged their performance program OR they sent the performance program back to you with comments/suggestions on items they would like for you to review and possibly makes adjustments/changes to the performance program:

Interview Exchange <info@interviewexchange.com>
to me ▾

1:50 PM (1 minute ago) ☆ ↶ ⋮

Hirezon | **Exchange**

Dear Test,

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

Performance Review Details
 Employee: Leah Holmes
 Supervisor: Test Oswego
 Template: Professional Employee Performance Program

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

Thank you for using the Interview Exchange.
 Interview Exchange Support

2.) Once you login to your Hirezon/Interview Exchange account, this will be the first screen you see- Assigned to Me and items that need your action:

The screenshot shows the user interface of the Hirezon/Interview Exchange dashboard. At the top, there is a navigation bar with links for 'Welcome: Test Oswego', 'Account', 'Notifications (8)', 'Help', 'Instructions', and 'Logout'. The user's name 'SUNY Oswego' and a 'Switch Module' button are also visible. Below the navigation bar is a red header with 'Dashboard' and a menu of options: 'Assigned to Me', 'My Reviews', 'My Team Reviews', 'Start Review', 'Action Items', and 'Guest Review'. The main content area is titled 'Assigned to Me' and features a yellow highlight indicating '6 form(s) for Action'.

3.) When you click on the forms that needs action link it will bring you to all Forms for Review:

The screenshot displays the 'Forms for Review' page. It includes the same navigation and header as the dashboard. The main section is a table with the following data:

EMPLOYEE	SUPERVISOR	CREATED	UPDATED	COMPLETED	STATUS
Test Oswego	Leah Holmes	04/05/2023 12:32 PM EST	04/05/2023 12:35 PM EST	---	Routing - In-Progress
Test Oswego	Leah Holmes	04/05/2023 12:36 PM EST	04/05/2023 12:50 PM EST	---	Routing - In-Progress
Test Oswego	Leah Holmes	04/05/2023 12:53 PM EST	04/05/2023 12:54 PM EST	---	Routing - In-Progress
Test Oswego	Leah Holmes	05/08/2023 09:51 AM EST	05/08/2023 09:52 AM EST	---	Routing - In-Progress
Test Oswego	Leah Holmes	05/22/2023 12:10 PM EST	05/22/2023 12:11 PM EST	---	Routing - In-Progress
Leah Holmes	Test Oswego	06/08/2023 09:42 AM EST	06/08/2023 10:01 AM EST	---	Routing - In-Progress

Below the table, there are two sections: 'Upcoming Forms for Review' with a message 'There are no reviews available to view at this time.' and 'Reviewed Forms' with a button labeled 'ADHOC REVIEWS'.

4.) Click on the employee’s name in blue and the form will pop up. Review the performance program, and any discussions/comments the employee wrote to you. You can respond back to those discussions within the form as well. (These are the little gray talk bubbles throughout the form). Scroll to the bottom and you will see the routing list:

Performance Review

Among the criteria that should be considered are: a) effectiveness of performance; b) mastery of specialization; c) professional ability; d) effectiveness of University service; and e) continuing growth.

0 * EXTENT TO WHICH SECONDARY SOURCES SHALL BE CONSULTED AS PART OF EVALUATION: Testing.

Secondary sources are agencies, offices, or individuals which will be involved with the performance of the employee and may affect the employee's ability to achieve the stated objectives. Identify specifically. If individuals are used, identify by title only.

Routing List

Employee: This is to signify that I have read and understand the above Performance Program.

*Note: If the supervisor and employee do not concur on the performance program, the employee has the right to provide their supervisor and Human Resources a statement within ten (10) working days of receipt that will be attached to the performance program.

#	Position	Name	Status
1	Employee	Leah Holmes	Acknowledged [06/08/2023 12:50 PM EST]
2	Immediate Supervisor	Test Oswego	Current Approver
3	HR / Personnel File	Leah Holmes	Not Sent

Comments

Acknowledge Receipt Edit and Resend

5.) You will see the employee either acknowledged the performance program or sent back to you for suggested changes. Review the performance program and you have two options:

a.) **Acknowledge Receipt**- which means you are finalizing the performance program and it will be sent to the HR Office to be filed in the employee's personnel file.

b.) **Edit and Resend**- you can make last minute changes if needed and resend back to the employee for their review and approval/acknowledgment.

i.) If you need to make changes and send it back to yourself for edits you will find the form back under My Team Reviews tab and click on the appropriate year:

Welcome: Test Oswego | Account | Notifications (9) | Help | Instructions | Logout
 SUNY Oswego
 Switch Module
 Dashboard
 Assigned to Me | My Reviews | **My Team Reviews** | Start Review | Action Items | Guest Review
 My Team Reviews
 → YEAR 2023
 ADHOC REVIEWS

ii.) Click on the paper and pencil icon to edit:

My Team Reviews

YEAR 2023

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
Leah Holmes	--	--	06/08/2023 09:42 AM EST	06/08/2023 01:04 PM EST	--	Form - In-Progress	Not Sent

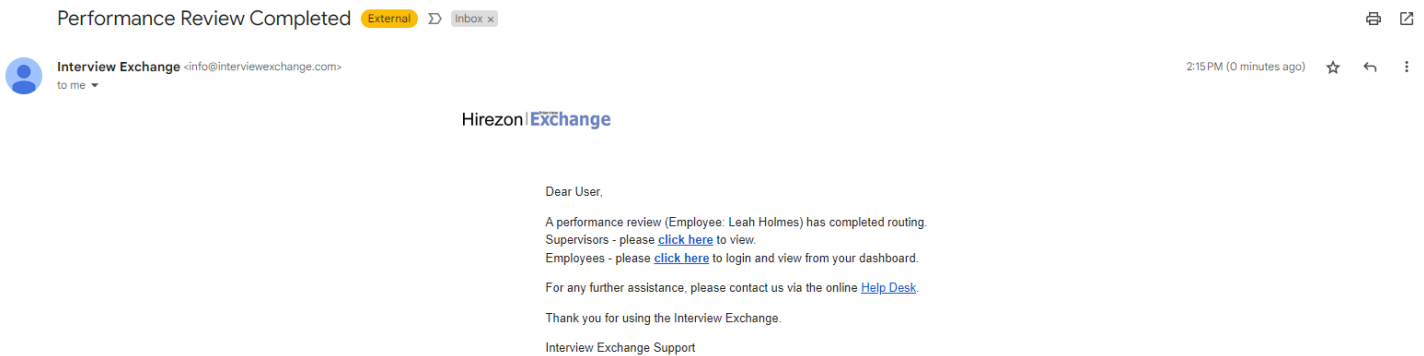
ADHOC REVIEWS

iii.) Make the necessary changes, scroll to the bottom- click Complete Form, then on the next screen verify the routing list again and click Send for Routing at the bottom. This will be sent back to the employee for their review/acknowledgment.

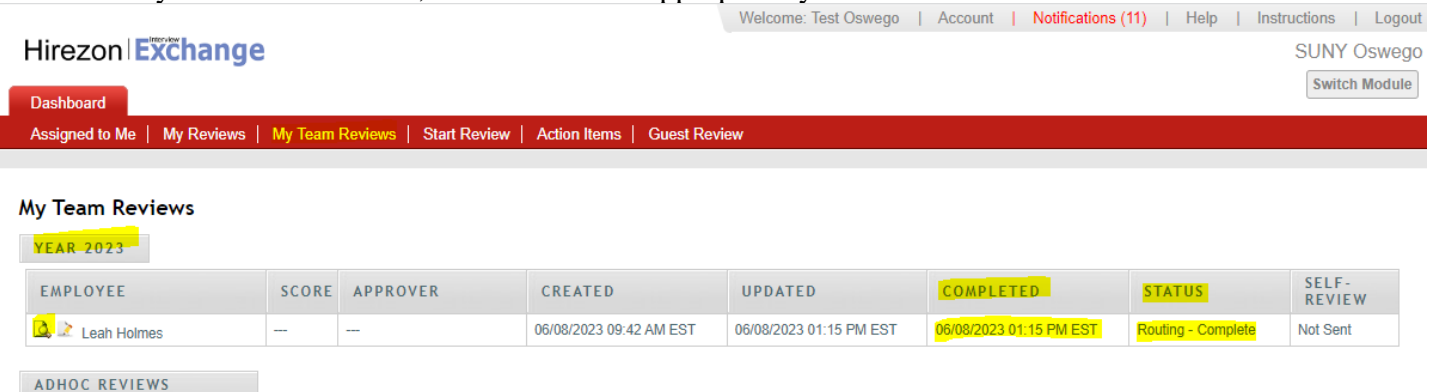
**Note: all discussions/comments made within the performance program will become a permanent part of the performance program file.*

How to Find Completed Direct Report Performance Programs

1.) Once the HR Office reviews, acknowledges, and files the performance program in the employees personnel file, you will receive an email notification that the process has been completed:



2.) You can login into your Hirezon/Interview Exchange account and find the final performance program under the My Team Reviews tab, and click on the appropriate year:



a.) You will now see there is a completed date and time filled in and the status reads, Routing-

Complete.

b.) You can then click on the paper with magnifying glass icon to view, when you scroll to the bottom of the performance program, you'll see all approvers have acknowledged the form with a date and time:

Routing List

Employee: This is to signify that I have read and understand the above Performance Program.

***Note:** If the supervisor and employee do not concur on the performance program, the employee has the right to provide their supervisor and Human Resources a statement within ten (10) working days of receipt that will be attached to the performance program.

#	Position	Name	Status
1	Employee	Leah Holmes	Acknowledged [06/08/2023 01:13 PM EST]
2	Immediate Supervisor	Test Oswego	Acknowledged [06/08/2023 01:14 PM EST]
3	HR / Personnel File	Leah Holmes	Acknowledged [06/08/2023 01:15 PM EST]

c.) Then you can download the final version into a PDF to save or print:

Professional Employee Performance Program SUNY Oswego

Employee:	Leah Holmes	Review Period:	Year 2023
Position:	Assistant Director of Human Resources	Department:	Human Resources
Supervisor:	Test Oswego	Discussions:	0
Created:	06/08/2023 09:42 AM EST	Completed:	06/08/2023 01:15 PM EST

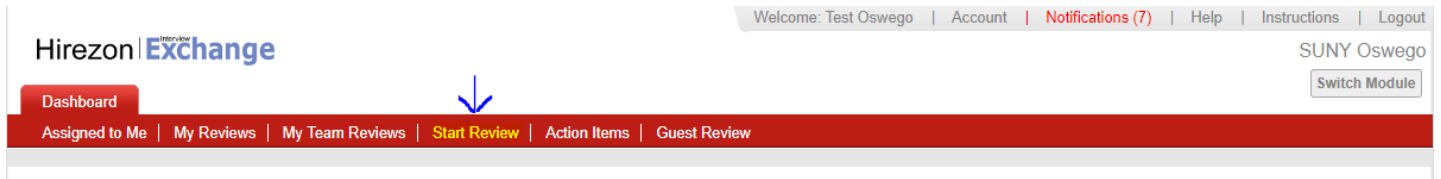
Instructions

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 Start New Evaluation

1.) Click on Start Review at the top of your dashboard:



It will then bring you to the following screen:

2.) Fill in all the requested information and click [Create Form](#):

Review Type: Will be Team Review when completing a form for a direct report.
Employee: Type in your direct reports name- they should auto populate, click on their name.

**If they do not auto populate that means they do not have access to the performance module- please contact hr@oswego.edu to request the access.*

***If the title of the employee is incorrect next to their name, the employee must log in to their Interview Exchange account and edit profile to update the title to their current title.*

Position: Type in your direct reports title.
Supervisor: Type in your name and it should auto populate, click on your name.
Review Period: Select the appropriate year for the evaluation.
Department: Choose the department your direct report is located in the drop down.
Template: You will see all active templates- choose *Professional Employee Evaluation*.

Create Performance Review

Review Type:

Employee: ✕

Position:

Supervisor: ✕

Review Period:

Department:

Template: 📎

[Create Form](#)

3.) The next screen will be the Professional Employee Evaluation form for you to complete.

**There are instructions at the top for your review.*

Welcome: Leah Holmes | Account | Notifications (67) | Help | Instructions | Logout

Hirezon | **Exchange** | SUNY Oswego

Dashboard | Performance Review | Admin | Switch Module

Assigned to Me | My Reviews | My Team Reviews | All Reviews | Start Review | Action Items | Guest Review

Test Oswego

Position: Admissions Coordinator | Review Period: Year 2023
 Supervisor: Leah Holmes | Department: Admissions

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 you log back into your account.

Next Level Supervisor: You will receive an email to review the evaluation that was prepared for the employee by their current supervisor. Review the evaluation and enter your recommendation (I

4.) Click on the + next to Employee Data and the form will drop down, complete the information required:



- EMPLOYEE DATA
Non-Scored | Reportable

* Budget Title:	Admissions Advisor	Saved
* Local Title:	Admissions Coordinator	Saved
* SL-Grade:	SL-3	Saved
* Evaluation Period Start date: (mm/dd/yyyy)	07/01/2022	Saved
* Evaluation Period End date: (mm/dd/yyyy)	06/30/2023	Saved
Date of Evaluation Meeting: (mm/dd/yyyy)	Please enter response here.	

**The Date of Evaluation Meeting is NOT required at this time in the process. If you do have a set date for your meeting with the employee, then please put the date in this field. If you do not have a set date yet, you can leave blank, put the evaluation through task routing and when it gets to you as the supervisor to approve and move forward, put the date you met with the employee in the comments section before you click acknowledge receipt.*

5.) Next, click on the + next to Evaluation and the form will drop down, complete the information required:



- EVALUATION
Non-Scored | Reportable

* SUPERVISOR EVALUATIVE COMMENTS: <small>Comments should present a summary of the employees effectiveness in performing assigned duties and responsibilities, with special attention to the achievement of short term objectives, and in progress towards the achievement of long-term objectives.</small>	Testing	Saved
* SUMMARY OF INFORMATION OF SECONDARY SOURCES IDENTIFIED IN PERFORMANCE PROGRAM:	Testing	Saved
* AREA OF COMMENDABLE PERFORMANCE OR WHERE IMPROVEMENTS SHOULD BE MADE:	Testing	Saved

6.) Lastly, click on the + next to Performance Rating and the form will drop down, complete the information required:

- PERFORMANCE RATING

Non-Scored | Reportable

* Please enter the performance rating.

Satisfactory



* Please select one of the following recommendations

I recommend renewal of this t



Complete Form

Go to Routing

**The form is exactly the same as the paper version you are used to working with. There are no language changes.*

**Note: As you use this system year after year, content will be saved, and you will be able to simply copy over from year to year on items that have not changed. You can do this by clicking on the stack of papers icon next to the square save icon. There will be a list of content you can choose from that was used for the same employee previously.*

7.) Once you are finished entering all the information, click the Complete Form box at the bottom:

Complete Form

You will get this notification box:

www.interviewexchange.com says

Please make sure all your responses are final.

Click OK to complete form or Cancel to review and make changes.

OK

Cancel

You can go ahead and click OK.

8.) After you click OK, the next screen will be the routing list (who needs to see/acknowledge) this evaluation:

Leah Holmes




Position: Admissions Coordinator **Review Period:** 2022 - 2023
Supervisor: Test Oswego **Department:** Admissions





Routing List

Employee: I have read and understood this report and have discussed its contents with my supervisor. My signature as an acknowledgement does not necessarily represent agreement.

Please write your comments in the text box below before clicking acknowledge receipt.

Supervisor: Please include the date of your evaluation meeting with the employee in the comments section below before clicking acknowledge receipt.

1. Employee	Leah Holmes	Not Sent	
2. Supervisor	Test Oswego	Not Sent	
3. Next Level Supervisor	Please add an user.		
4. HR Admin / Personnel File	Human Resources	Not Sent	

 View Form |  Send For Routing |  Edit Form |  Clone

The employee (direct report) will be auto populated as the first person to review. As the immediate supervisor, you will add your name there by clicking on the pen and pencil icon on the right and click save. Next, add in the next level supervisor and click save. Then the last to receive will be the HR Office which is hard coded, and you will not need to do anything with.

Once you have the routing list completed, click [Send for Routing](#) at the bottom.

9.) After you click Send for Routing, the employee (direct report) will receive an email notification letting them know they have an evaluation to review in Hirezon/Interview Exchange from their supervisor:



Interview Exchange <info@interviewexchange.com>
to me ▾

1:25 PM (1 minute ago)



Hirezon | interview Exchange

Dear Test,

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

Thank you for using the Interview Exchange.

Interview Exchange Support

How to Find Direct Report Evaluations in Process

1.) Click on My Team Reviews tab on the top of your Dashboard, then click on the year the performance program was for:

Welcome: Test Oswego | Account | Notifications (7) | Help | Instructions | Logout

SUNY Oswego

Switch Module

Dashboard

Assigned to Me | My Reviews | **My Team Reviews** | Start Review | Action Items | Guest Review

My Team Reviews

→ YEAR 2023

ADHOC REVIEWS

2.) The drop-down menu will give you information on what is in process and who the performance program is sitting with for approval:

Welcome: Test Oswego | Account | Notifications (7) | Help | Instructions | Logout

SUNY Oswego

Switch Module

Dashboard

Assigned to Me | My Reviews | **My Team Reviews** | Start Review | Action Items | Guest Review

My Team Reviews

YEAR 2023

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
Leah Holmes	---	Leah Holmes	06/08/2023 09:42 AM EST	06/08/2023 10:01 AM EST	---	Routing - In-Progress	Not Sent

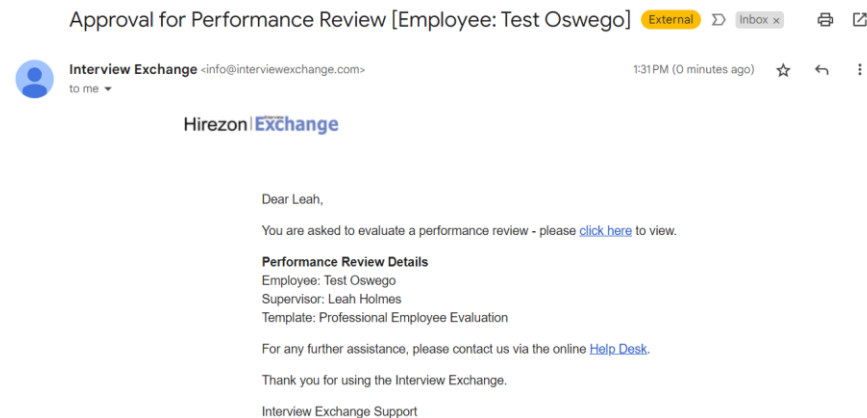
ADHOC REVIEWS

- a.) You can click on the paper with magnifying glass next to the employee's name to view the performance program. *You can download into a PDF or print if needed- if you'd like to bring a physical copy to the meeting with your employee. If you do this, please remember this is NOT the 20

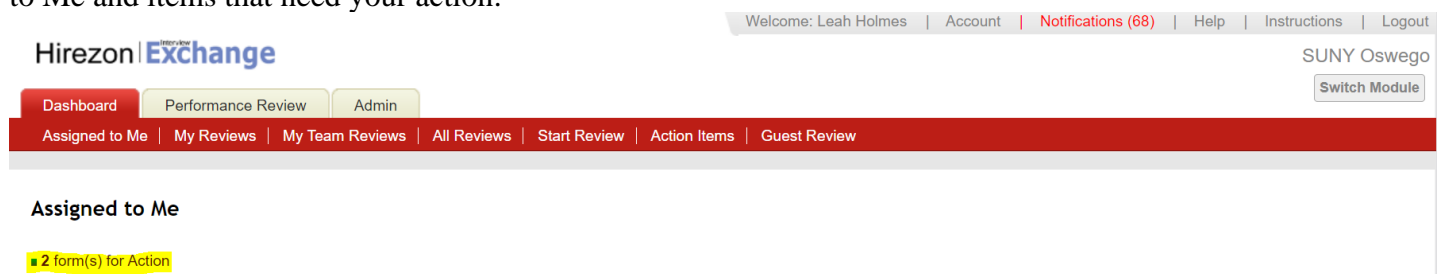
final copy. The final copy will not be until the employee, you and HR have approved/acknowledged in the system.

How to Review/Acknowledge Direct Report Evaluations

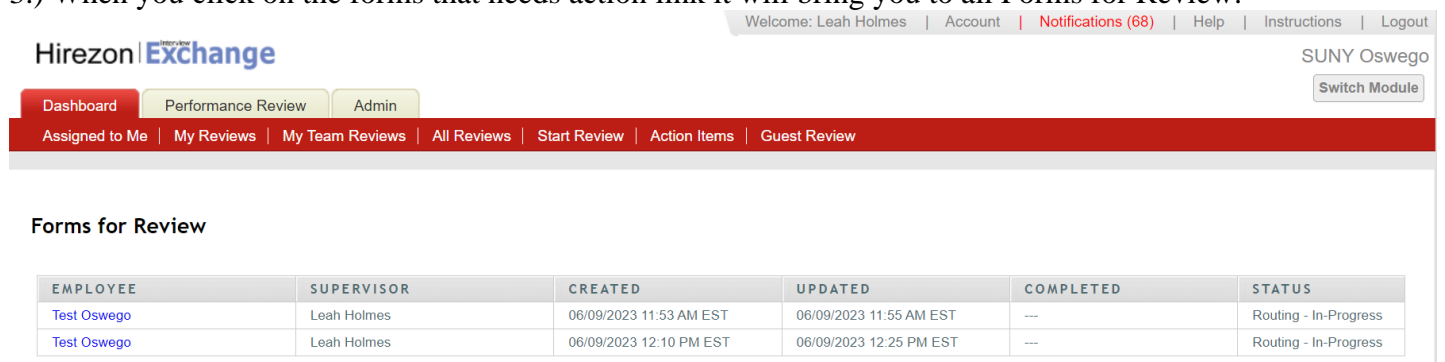
1.) You will receive an email notification once your direct report has either approved/acknowledged their evaluation OR they sent the evaluation back to you with comments/suggestions on items they would like for you to review and possibly makes adjustments/changes to the evaluation:




2.) Once you login to your Hirezon/Interview Exchange account, this will be the first screen you see- Assigned to Me and items that need your action:



3.) When you click on the forms that needs action link it will bring you to all Forms for Review:



4.) Click on the employee's name in blue and the form will pop up. Review the evaluation, and any discussions/comments the employee wrote to you. You can respond back to those discussions within the form as well. (These are the little gray talk bubbles throughout the form ). Scroll to the bottom and you will see the routing list:

Performance Review

PERFORMANCE RATING | 0

Question	Response
0 * Please enter the performance rating.	Satisfactory
0 * Please select one of the following recommendations	I recommend renewal of this term appointment

Routing List

Employee: I have read and understood this report and have discussed its contents with my supervisor. My signature as an acknowledgement does not necessarily represent agreement.
Write your Comments in the text box below before click Acknowledge receipt

#	Position	Name	Status
1	Employee	Test Oswego	Acknowledged 06/09/2023 12:31 PM EST
2	Supervisor	Leah Holmes	Current Approver
3	Next Level Supervisor	Leah Holmes	Not Sent
4	HR Admin / Personnel File	Human Resources	Not Sent

5.) You will see the employee either acknowledged the evaluation or sent back to you for suggested changes. Review the evaluation and you have two options:

a.) **Acknowledge Receipt**- which means you are finalizing the evaluation and sending it to the next level supervisor, then the evaluation will be sent to the HR Office to be filed in the employee's personnel file.

**If you did not put the Date of Evaluation Meeting in the top Employee Data section, please put the date you met with the employee within the comments box section before clicking acknowledge receipt, so it is documented with the evaluation.*

b.) **Edit and Resend**- you can make last minute changes if needed and resend back to the employee for their review and approval/acknowledgment.

i.) If you need to make changes and send it back to yourself for edits you will find the form back under My Team Reviews tab and click on the appropriate year:

Hirezon Exchange

Welcome: Test Oswego | Account | Notifications (9) | Help | Instructions | Logout

SUNY Oswego

Dashboard

Assigned to Me | My Reviews | My Team Reviews | Start Review | Action Items | Guest Review

My Team Reviews

YEAR 2023

ADHOC REVIEWS

ii.) Click on the paper and pencil icon to edit:

Hirezon Exchange

Welcome: Test Oswego | Account | Notifications (9) | Help | Instructions | Logout

SUNY Oswego

Dashboard

Assigned to Me | My Reviews | My Team Reviews | Start Review | Action Items | Guest Review

My Team Reviews

YEAR 2023

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
Leah Holmes	--	--	06/08/2023 09:42 AM EST	06/08/2023 01:04 PM EST	--	Form - In-Progress	Not Sent

ADHOC REVIEWS

iii.) Make the necessary changes, scroll to the bottom- click Complete Form, then on the next screen verify the routing list again and click Send for Routing at the bottom. This will be sent

back to the employee for their review/acknowledgment.

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

How to Find Completed Direct Report Evaluations

1.) Once the HR Office reviews, acknowledges, and files the evaluation in the employees personnel file, you will receive an email notification that the process has been completed.

2.) You can login into your Hirezon/Interview Exchange account and find the final evaluation under the My Team Reviews tab, and click on the appropriate year:

My Team Reviews

YEAR 2023

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
Leah Holmes	---	---	06/08/2023 09:42 AM EST	06/08/2023 01:15 PM EST	06/08/2023 01:15 PM EST	Routing - Complete	Not Sent

ADHOC REVIEWS

a.) You will now see there is a completed date and time filled in and the status reads, Routing-Complete.

b.) You can then click on the paper with magnifying glass icon to view, when you scroll to the bottom of the evaluation, you'll see all approvers have acknowledged the form with a date and time.

c.) Then you can download the final version into a PDF to save or print:

Performance Review

OSWEGO
STATE UNIVERSITY OF NEW YORK

Professional Employee Evaluation SUNY Oswego

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

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>.