

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

SUPERVISOR VIEW

Hirezon/Interview Exchange
Performance Review Module



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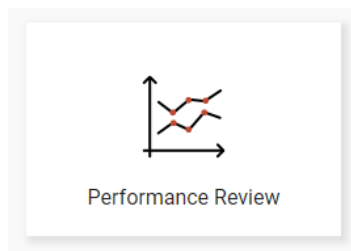
Login to Interview Exchange

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](#).

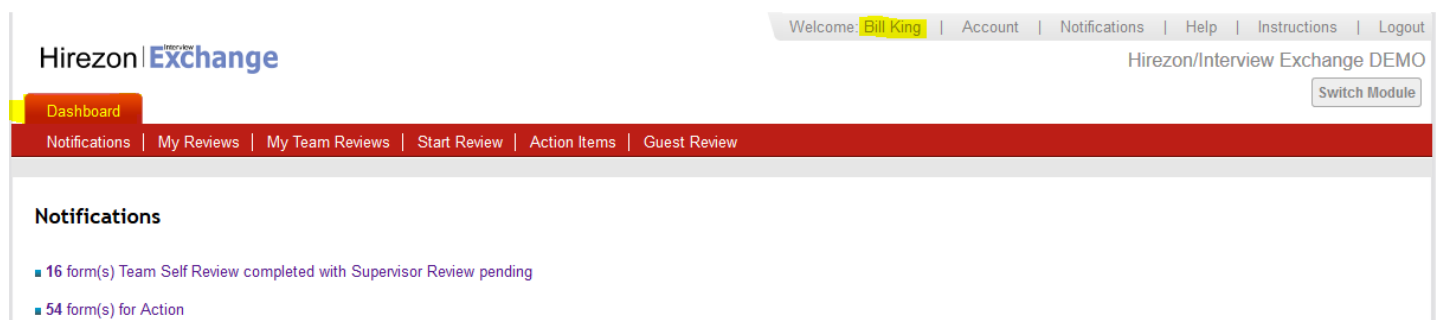
3. Click on this icon:



4. This will bring you to your main Dashboard.

Dashboard

Supervisor View



The screenshot shows the "Supervisor View" dashboard for Hirezon Interview Exchange. At the top right, there is a navigation bar with links for "Welcome Bill King", "Account", "Notifications", "Help", "Instructions", and "Logout". Below this, the text "Hirezon/Interview Exchange DEMO" is displayed, along with a "Switch Module" button. A red navigation bar contains links for "Dashboard", "Notifications", "My Reviews", "My Team Reviews", "Start Review", "Action Items", and "Guest Review". The main content area is titled "Notifications" and lists two items: "16 form(s) Team Self Review completed with Supervisor Review pending" and "54 form(s) for Action".

Supervisor Dashboard Tabs

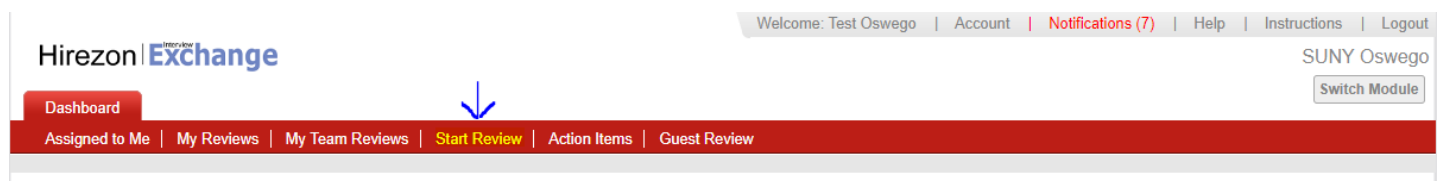
| | Description |
|-----------------|--|
| Dashboard | Your personalized landing page after login |
| Assigned to me | Displays all pending work. |
| My Reviews | Displays your Evaluation Form(s) and review(s) |
| My Team Reviews | Displays the Evaluation Form(s) and review(s) of your employees only. |
| 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 CSEA 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:

Employee:

Position:

Supervisor:

Review Period:

Department:

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 *CSEA Performance Program*.

Switch Module

Dashboard

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

Create Performance Review

Review Type:

Employee: ✕

Position:

Supervisor: ✕

Review Period:

Department:

Template: 📄

[Create Form](#)

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

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

Switch Module

Dashboard

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

Leah Holmes

Position: Administrative Assistant Review Period: Year 2023
 Supervisor: Test Oswego Department: Career Services

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.

+ SECTION 1 - EMPLOYEE IDENTIFICATION

Non-Scored | Reportable

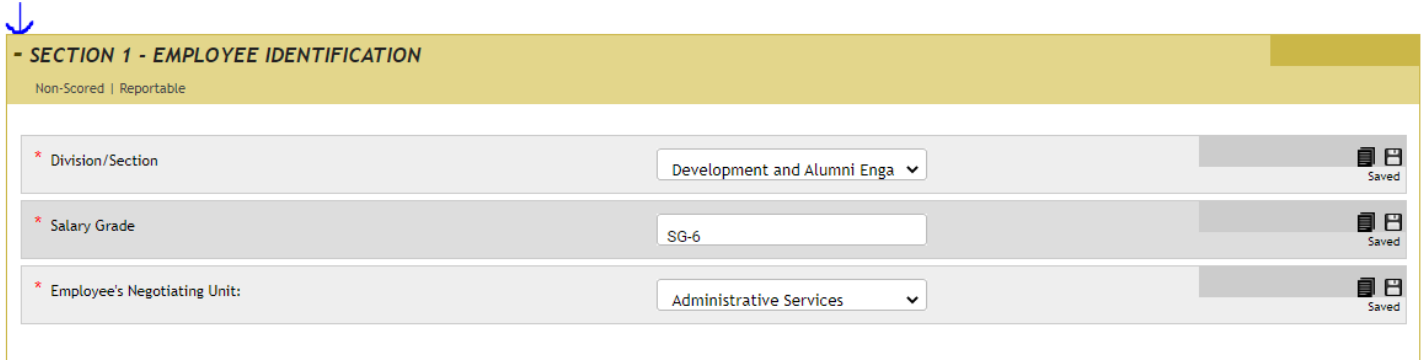
+ SECTION 2A - PERFORMANCE PROGRAM

Non-Scored | Reportable

Complete Form

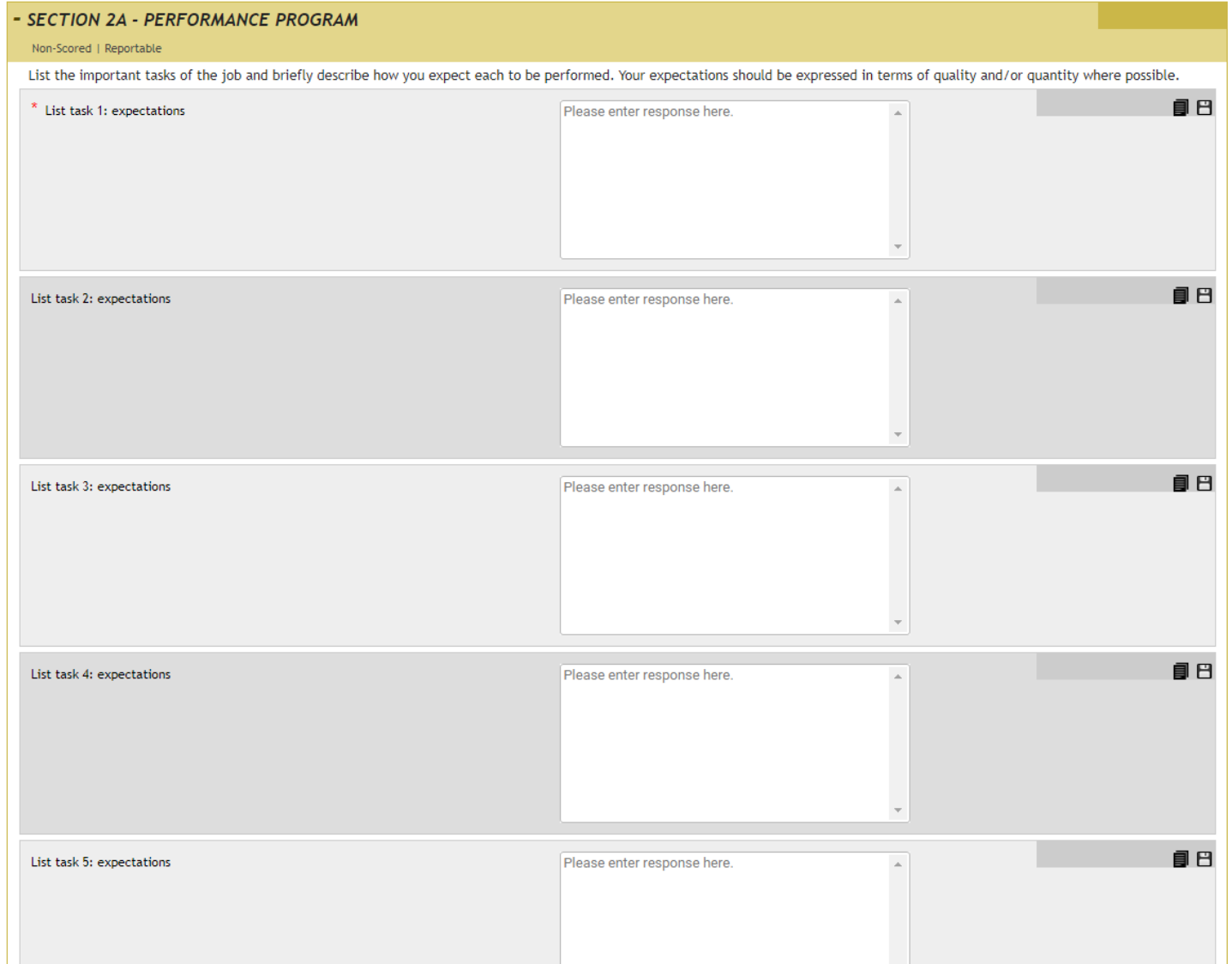
View Form Clone Delete Attach Past Reviews

4.) Click on the + next to Section 1- Employee Identification and the form will drop down, complete the information required:



A screenshot of a web form titled "SECTION 1 - EMPLOYEE IDENTIFICATION". The form is set against a light yellow background. Below the title, it says "Non-Scored | Reportable". There are three rows of input fields, each with a red asterisk indicating a required field. The first row is "Division/Section" with a dropdown menu showing "Development and Alumni Enga". The second row is "Salary Grade" with a text input field containing "SG-6". The third row is "Employee's Negotiating Unit:" with a dropdown menu showing "Administrative Services". To the right of each row is a grey button with a document icon and the word "Saved". A blue arrow points down to the top left of the form.

5.) Next, click on the + next to Section 2A- Performance Program and the form will drop down, complete the information required:



A screenshot of a web form titled "SECTION 2A - PERFORMANCE PROGRAM". The form is set against a light yellow background. Below the title, it says "Non-Scored | Reportable". The main instruction reads: "List the important tasks of the job and briefly describe how you expect each to be performed. Your expectations should be expressed in terms of quality and/or quantity where possible." Below this are five rows, each labeled "List task X: expectations" (where X is 1 through 5). Each row has a large text input area with the placeholder text "Please enter response here." and a vertical scrollbar. To the right of each row is a grey button with a document icon and the word "Saved".

**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.

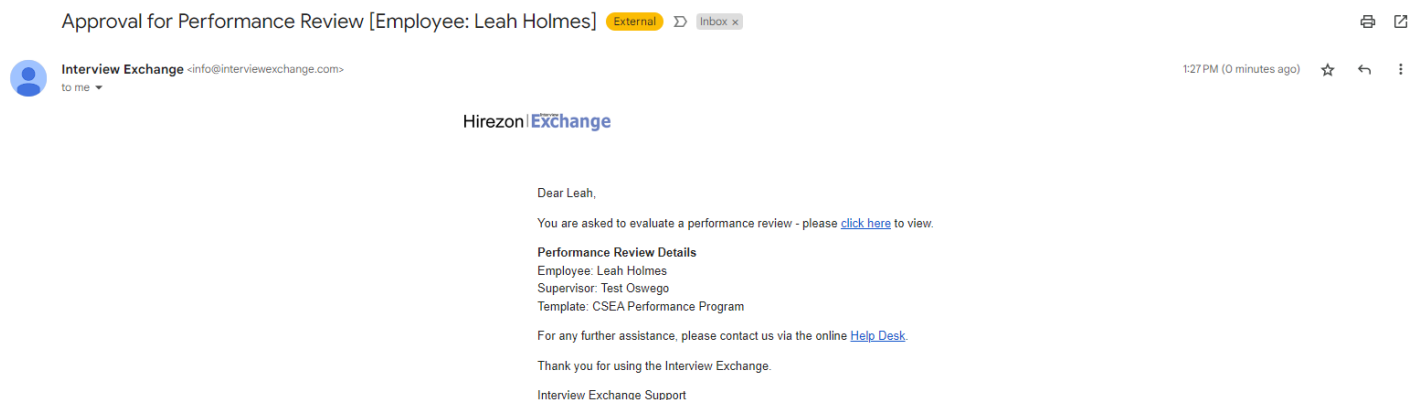
7.) After you click OK, the next screen will be the routing list (who needs to see/acknowledge) this performance program:

The screenshot shows the 'Routing List' section of the Hirezon Interview Exchange system. At the top, there is a navigation bar with 'Welcome: Test Oswego', 'Account', 'Notifications (12)', 'Help', 'Instructions', and 'Logout'. The user is identified as 'SUNY Oswego'. Below the navigation bar, there is a red header with 'Dashboard' and a sub-header with 'Assigned to Me', 'My Reviews', 'My Team Reviews', 'Start Review', 'Action Items', and 'Guest Review'. The main content area displays the name 'Leah Holmes' and her details: Position: Administrative Assistant, Review Period: Year 2023, Supervisor: Test Oswego, and Department: Career Services. Below this, the 'Routing List' section shows a statement: 'I have read and understood this performance program and have discussed with my supervisor.' The routing list consists of three rows, each representing a reviewer: 1. Employee (Leah Holmes, Not Sent), 2. Supervisor (Test Oswego, Not Sent), and 3. HR Admin/Personnel File. (Human Resources, Not Sent). At the bottom of the routing list, there are four icons: '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, your name will also be auto populated. 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 CSEA 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 links for '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 the following tabs: '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 'YEAR 2023' button highlighted by a blue arrow and an 'ADHOC REVIEWS' button below it.

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' section expanded. The 'YEAR 2023' button is selected. Below it is a table with the following columns: 'EMPLOYEE', 'SCORE', 'APPROVER', 'CREATED', 'UPDATED', 'COMPLETED', 'STATUS', and 'SELF-REVIEW'. The table contains one row of data for Leah Holmes. The 'STATUS' column for Leah Holmes is 'Routing - In-Progress'.

| 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 CSEA 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:

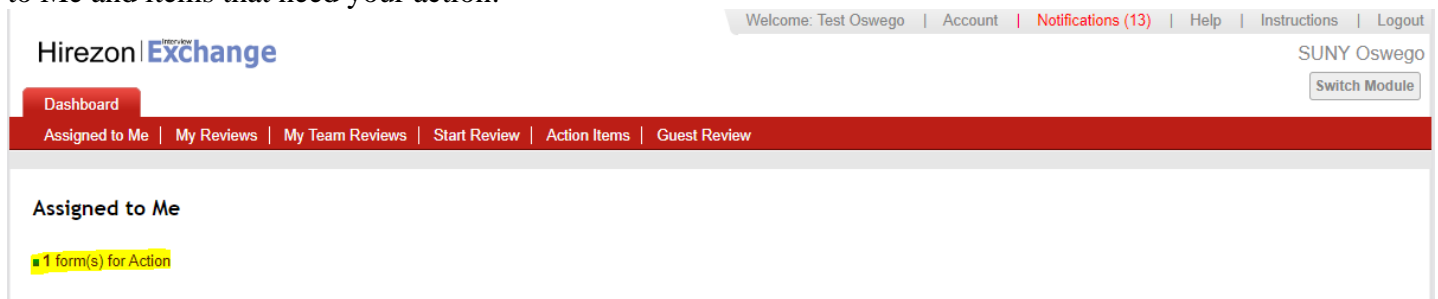
 Interview Exchange <info@interviewexchange.com>
to me

1:30 PM (0 minutes 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: CSEA 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:

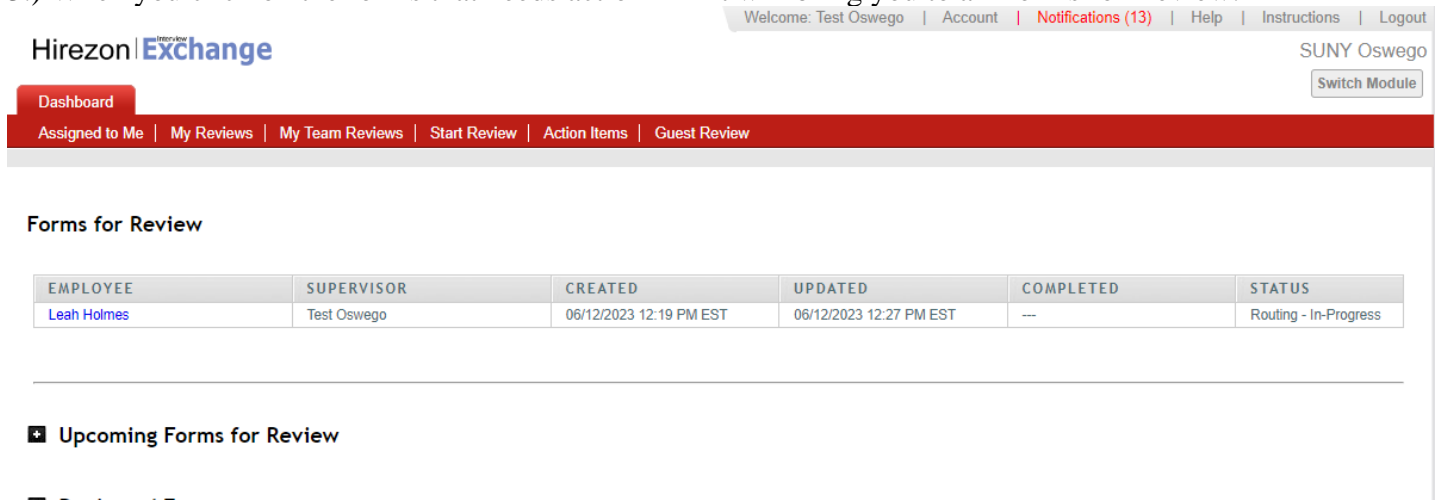


Dashboard | Assigned to Me | My Reviews | My Team Reviews | Start Review | Action Items | Guest Review

Assigned to Me

1 form(s) for Action

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




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

Forms for Review

| EMPLOYEE | SUPERVISOR | CREATED | UPDATED | COMPLETED | STATUS |
|-----------------------------|-------------|-------------------------|-------------------------|-----------|-----------------------|
| Leah Holmes | Test Oswego | 06/12/2023 12:19 PM EST | 06/12/2023 12:27 PM EST | --- | Routing - In-Progress |

Upcoming Forms for Review

Reviewed Forms

4.) Click on the employee’s name in blue and the form will pop up. Review the CSEA 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  - those will be green if there is a discussion/comment entered within that section for you to review.). Scroll to the bottom and you will see the routing list:

Performance Review

| | | |
|---|-----------------------------|---------|
| 0 | * List task 1: expectations | Testing |
| 0 | List task 2: expectations | Testing |
| 1 | List task 3: expectations | Testing |
| 0 | List task 4: expectations | Testing |
| 0 | List task 5: expectations | Testing |
| 0 | List Additional Tasks Here: | Testing |

Routing List

I have read and understood this performance program and have discussed with my supervisor.

| # | Position | Name | Status |
|------------------|--------------------------|-----------------|--|
| 1 | Employee | Leah Holmes | Acknowledged [06/12/2023 12:29 PM EST] |
| Comment: Testing | | | |
| 2 | Supervisor | Test Oswego | Current Approver |
| 3 | HR Admin/Personnel File. | Human Resources | 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

Hirezon Exchange
 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 CSEA 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:

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 performance program, 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



CSEA Performance Program SUNY Oswego

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

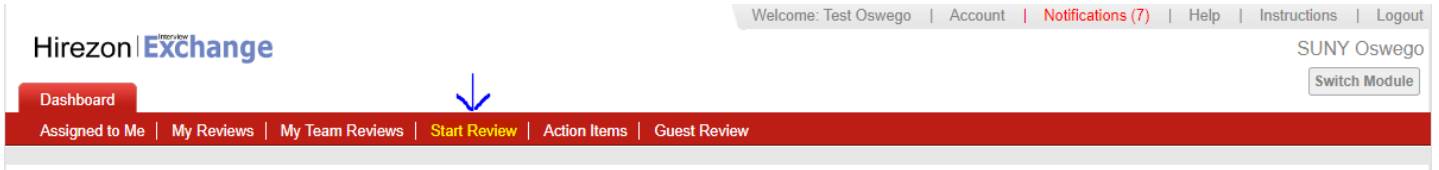
Instructions

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 Start New CSEA 6 Month Recertification

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



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

Hirezon | Exchange SUNY Oswego

Dashboard Switch Module

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

It will then bring you to the following screen:

Create Performance Review

Review Type:

Employee:

Position:

Supervisor:

Review Period:

Department:

[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.*
- 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 *CSEA 6 Month Recertification*.

Hirezon | powered by Exchange

Welcome: Test Oswego | Account | Notifications (13) | 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:

Employee: ✕

Position:

Supervisor: ✕

Review Period:

Department:

Template: 📄

[Create Form](#)

3.) The next screen will be the CSEA 6 Month Recertification form for you to complete.

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

Welcome: Test Oswego | Account | Notifications (13) | Help | Instructions | Logout

Hirezon Exchange

SUNY Oswego

Dashboard

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

Leah Holmes

Position: Administrative Assistant Review Period: Year 2023

Supervisor: Test Oswego Department: Career Services

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 be in your dashboard when you log back into your account.

+ SECTION 1 - EMPLOYEE IDENTIFICATION
Non-Scored | Reportable

+ SECTION 2A - PERFORMANCE PROGRAM
Non-Scored | Editable by Supervisor

+ SECTION 3 - SIX-MONTH RECERTIFICATION
Non-Scored | Reportable

Complete Form

4.) Click on the + next to Section 1- Employee Identification and the form will drop down, complete the information required:

- SECTION 1 - EMPLOYEE IDENTIFICATION
Non-Scored | Reportable

* Division/Section Development and Alumni Enga Saved



* Salary Grade SG-6 Saved



* Employee's Negotiating Unit: Administrative Services Saved



5.) Next, click on the + next to Section 2A- Performance Program and the form will drop down, complete the information required:



- SECTION 2A - PERFORMANCE PROGRAM
Non-Scored | Reportable



List the important tasks of the job and briefly describe how you expect each to be performed. Your expectations should be expressed in terms of quality and/or quantity where possible.

* List task 1: expectations  

List task 2: expectations  

List task 3: expectations  

List task 4: expectations  

List task 5: expectations  

**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.) Last, click on the + next to Section 3- Six-Month Recertification and the form will drop down, complete the information required:

- SECTION 3 - SIX-MONTH RECERTIFICATION

Non-Scored | Reportable

We met within one month before or after the approximate midpoint of the rating period to discuss the employee's performance, and to reaffirm or revise the performance program

* List the REVISED tasks of the job and briefly describe how you expect each to be performed. Your expectations should be expressed in terms of quality and/or quantity where possible.

Please enter response here.

* If a rating were assigned today, based upon service to date, I would propose that it be

--Select--

Note: This is not a rating; therefore, it is not appealable.

**Note: If there were no revisions to any tasks you can enter N/A in the text box.*

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 6 Month Recertification:

Welcome: Test Oswego | Account | Notifications (13) | Help | Instructions | Logout

Hirezon Interview Exchange SUNY Oswego
Switch Module

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

Leah Holmes

Position: Administrative Assistant **Review Period:** Year 2023
Supervisor: Test Oswego **Department:** Career Services

Routing List
 I met with my supervisor to discuss my work performance. I have read this recertification and discussed it with my supervisor. My signature as acknowledgement does not necessarily signify that I agree with this proposed evaluation.

| | | | |
|----------------------------|-----------------|----------|--|
| 1. Employee | Leah Holmes | Not Sent | |
| 2. Supervisor | Test Oswego | Not Sent | |
| 3. 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, your name will also be auto populated. 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 the 6 Month Recertification to review in Hirezon/Interview Exchange from their supervisor:

Approval for Performance Review [Employee: Leah Holmes] External ⓘ Inbox x

Interview Exchange <info@interviewexchange.com> to me

2:02 PM (0 minutes ago) ☆ ↶ ⋮

Hirezon Interview 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

How to Find Direct Report CSEA 6 Month Recertification 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 Interview Exchange dashboard. At the top, there is a navigation bar with links for 'Welcome: Test Oswego', 'Account', 'Notifications (7)', 'Help', 'Instructions', and 'Logout'. Below this is a secondary navigation bar with 'Dashboard', 'Assigned to Me', 'My Reviews', 'My Team Reviews', 'Start Review', 'Action Items', and 'Guest Review'. A blue arrow points to the 'My Team Reviews' tab. Below the navigation bar, there is a section titled 'My Team Reviews' with a dropdown menu showing 'YEAR 2023' and 'ADHOC REVIEWS'. A blue arrow points to the 'YEAR 2023' option.

2.) The drop-down menu will give you information on what is in process and who the 6 Month Recertification is sitting with for approval:

The screenshot shows the Hirezon Interview Exchange dashboard with the 'My Team Reviews' section expanded. It displays a table with the following columns: EMPLOYEE, SCORE, APPROVER, CREATED, UPDATED, COMPLETED, STATUS, and SELF-REVIEW. The table contains one row for Leah Holmes. Below the table is a button for 'ADHOC REVIEWS'.

| 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 6 Month Recertification. *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 CSEA 6 Month Recertification

1.) You will receive an email notification once your direct report has either approved/acknowledged their 6 Month Recertification OR they sent the 6 Month Recertification back to you with comments/suggestions on items they would like for you to review and possibly makes adjustments/changes to the 6 Month Recertification:

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:

Assigned to Me

1 form(s) for Action

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

Forms for Review

| EMPLOYEE | SUPERVISOR | CREATED | UPDATED | COMPLETED | STATUS |
|-------------|-------------|-------------------------|-------------------------|-----------|-----------------------|
| Leah Holmes | Test Oswego | 06/12/2023 12:19 PM EST | 06/12/2023 12:27 PM EST | --- | Routing - In-Progress |

Upcoming Forms for Review

Reviewed Forms

4.) Click on the employee's name in blue and the form will pop up. Review the CSEA 6 Month Recertification, 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 - those will be green if there is a discussion/comment entered within that section for you to review.). Scroll to the bottom and you will see the routing list:

Performance Review

SECTION 3 - SIX-MONTH RECERTIFICATION 0

| Question | Response |
|---|--------------|
| 0 * List the REVISED tasks of the job and briefly describe how you expect each to be performed. Your expectations should be expressed in terms of quality and/or quantity where possible. | Testing |
| 0 * If a rating were assigned today, based upon service to date, I would propose that it be | Satisfactory |

Note: This is not a rating; therefore, it is not appealable.

Routing List

I met with my supervisor to discuss my work performance. I have read this recertification and discussed it with my supervisor. My signature as acknowledgement does not necessarily signify that I agree with this proposed evaluation.

| # | Position | Name | Status |
|---|-------------------------|-----------------|---------------------------------------|
| 1 | Employee | Leah Holmes | Acknowledged :06/12/2023 01:07 PM EST |
| 2 | Supervisor | Test Oswego | Current Approver |
| 3 | HR Admin/Personnel File | Human Resources | Not Sent |

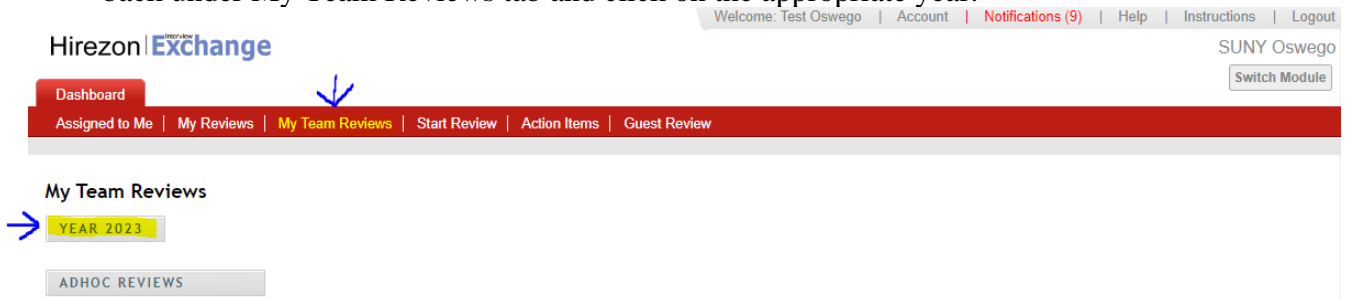
Comments

Acknowledge Receipt
Edit and Resend

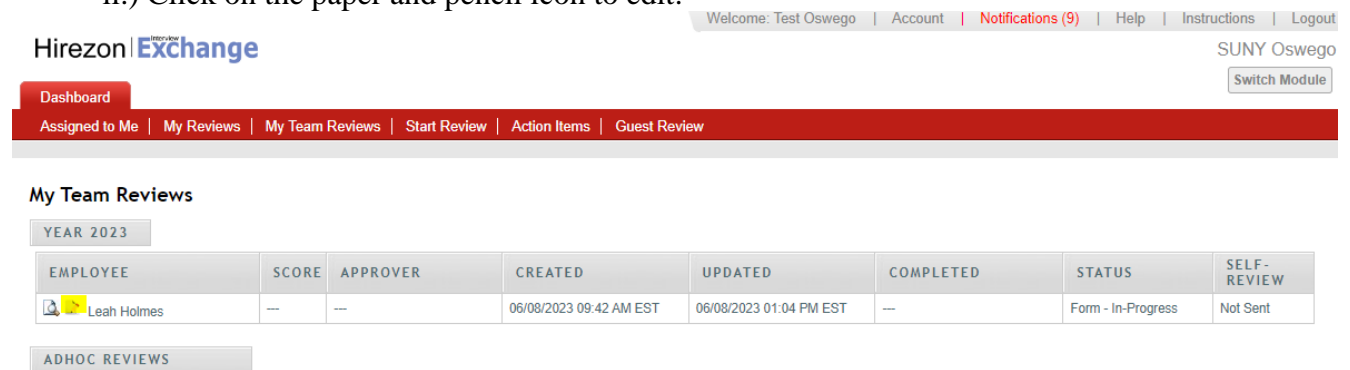
5.) You will see the employee either acknowledged the 6 Month Recertification or sent back to you for

suggested changes. Review the 6 Month Recertification and you have two options:

- a.) **Acknowledge Receipt**- which means you are finalizing the 6 Month Recertification 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:



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



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 6 Month Recertification will become a permanent part of the file.*

How to Find Completed Direct Report CSEA 6 Month Recertification

- 1.) Once the HR Office reviews, acknowledges, and files the 6 Month Recertification 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 6 Month Recertification 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 6 Month Recertification, 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

CSEA 6 Month Recertification
SUNY Oswego

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

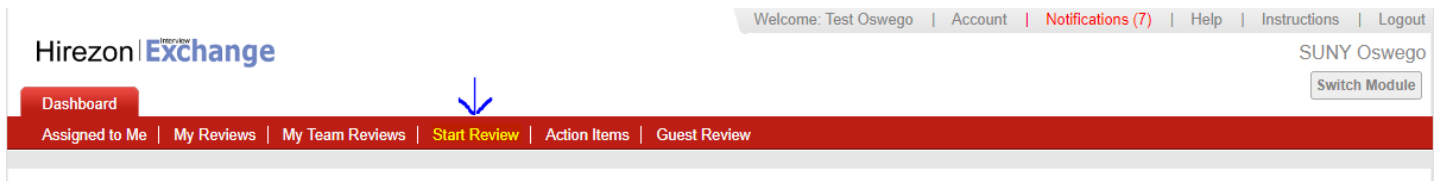
Instructions

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 Start New CSEA Annual Evaluation/Appraisal

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.*
- 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 *CSEA Annual Evaluation/Appraisal*.

Create Performance Review

Review Type:

Employee: ✕

Position:

Supervisor: ✕

Review Period:

Department:

Template: 📄

Create Form

3.) The next screen will be the CSEA Annual Evaluation/Appraisal form for you to complete.

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

Leah Holmes

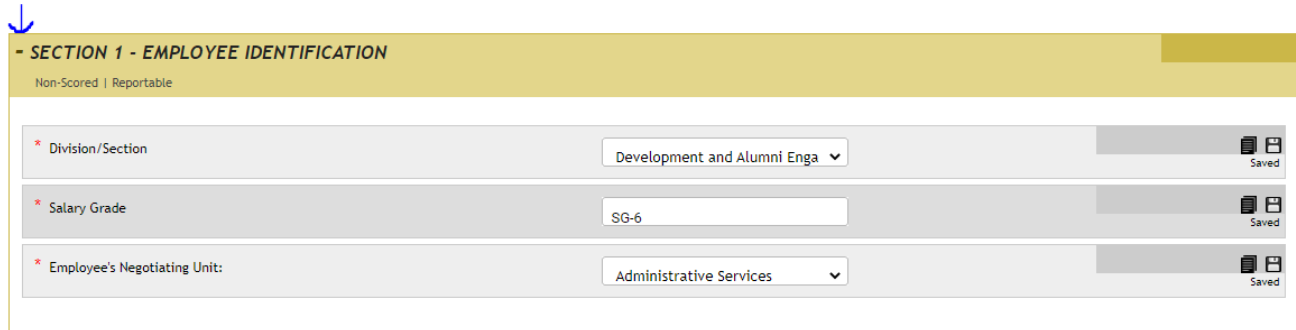
Position: Administrative Assistant Review Period: Year 2023
 Supervisor: Test Oswego Department: Career Services

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.

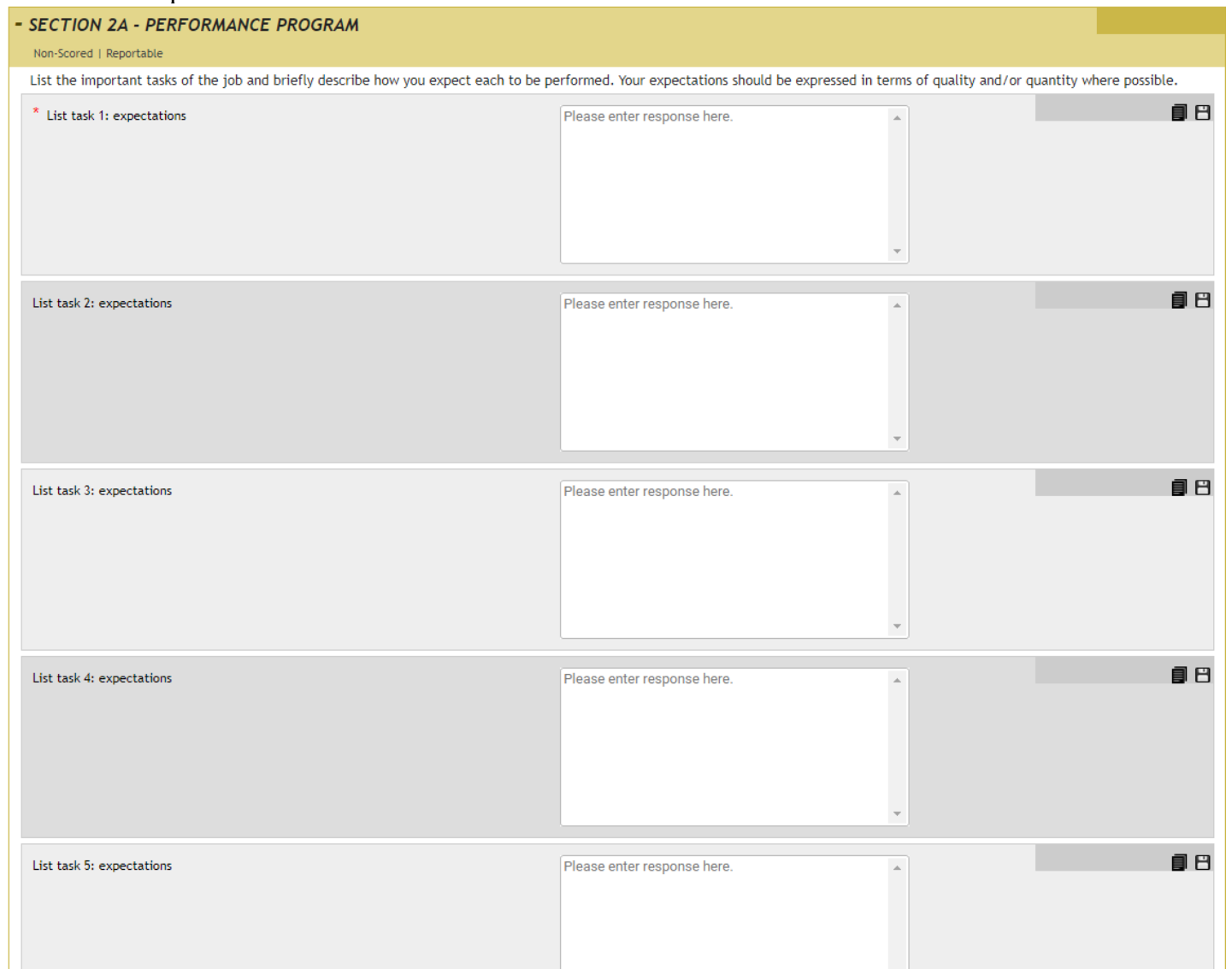
| | |
|---------------------------------------|----|
| + SECTION 1 - EMPLOYEE IDENTIFICATION | |
| Non-Scored Reportable | |
| + SECTION 2A - PERFORMANCE PROGRAM | Q+ |
| Non-Scored Editable by Supervisor | |
| + SECTION 2B - PERFORMANCE APPRAISAL | Q+ |
| Non-Scored Editable by Supervisor | |
| + SECTION 4: SUPERVISOR'S COMMENTS | |
| Non-Scored | |
| + SECTION 5: PERFORMANCE RATINGS | |

4.) Click on the + next to Section 1- Employee Identification and the form will drop down, complete the information required:



A screenshot of a web form titled "SECTION 1 - EMPLOYEE IDENTIFICATION" with a sub-header "Non-Scored | Reportable". The form contains three rows of input fields, each with a "Saved" icon to its right. The first row is labeled "Division/Section" and has a dropdown menu with "Development and Alumni Enga" selected. The second row is labeled "Salary Grade" and has a text input field containing "SG-6". The third row is labeled "Employee's Negotiating Unit:" and has a dropdown menu with "Administrative Services" selected. A blue arrow points to the top left corner of the form.

5.) Next, click on the + next to Section 2A- Performance Program and the form will drop down, complete the information required:



A screenshot of a web form titled "SECTION 2A - PERFORMANCE PROGRAM" with a sub-header "Non-Scored | Reportable". Below the header is a text instruction: "List the important tasks of the job and briefly describe how you expect each to be performed. Your expectations should be expressed in terms of quality and/or quantity where possible." The form contains five rows, each with a label on the left and a text input field on the right. The first row is labeled "* List task 1: expectations" and the others are "List task 2: expectations", "List task 3: expectations", "List task 4: expectations", and "List task 5: expectations". Each text input field contains the placeholder text "Please enter response here." and has a "Saved" icon to its right.

6.) Next, click on the + next to Section 2B- Performance Appraisal and the form will drop down, complete the

information required:

- SECTION 2B - PERFORMANCE APPRAISAL Q+

Non-Scored | Editable by Supervisor

* Task 1: Describe the employee's performance in accomplishing task 1 specified in Section 2A. Explain how the employee's performance met, exceeded or failed to meet your expectations.

Task 2: Describe the employee's performance in accomplishing task 2 specified in Section 2A. Explain how the employee's performance met, exceeded or failed to meet your expectations.

Task 3: Describe the employee's performance in accomplishing task 3 specified in Section 2A. Explain how the employee's performance met, exceeded or failed to meet your expectations.

Task 4: Describe the employee's performance in accomplishing task 4 specified in Section 2A. Explain how the employee's performance met, exceeded or failed to meet your expectations.

Task 5: Describe the employee's performance in accomplishing task 5 specified in Section 2A. Explain how the employee's performance met, exceeded or failed to meet your expectations.

7.) Next, click on the + next to Section 4- Supervisor's Comments and the form will drop down, complete the information required:

- SECTION 4: SUPERVISOR'S COMMENTS

Non-Scored

Comment on other aspects of the employee's performance (such as skills, behaviors, personal characteristics and time and attendance patterns) which have affected the employee's performance or the performance of other employees. Suggest ways in which performance can be improved.

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

- SECTION 5: PERFORMANCE RATINGS

Non-Scored | Reportable

SATISFACTORY: This is a broad category which covers a wide range of employees, all of whom are performing acceptably. It is the expected and usual level of performance. The employee generally meets performance expectations as specified in the performance program for all tasks and performs in a good, competent manner. This is the level which can minimally be expected from an employee in order for the work unit to function effectively. The employee's performance may also be characterized as meeting minimal performance expectations for the job yet there are many areas of performance which should be improved. The employee may meet performance expectations for certain tasks or assignments, but some assignments may require extra follow-up and direction by the supervisor. It is only when the employee's performance clearly shows that it is below the expected performance level that a rating other than "Satisfactory" should be considered.

Note: Because this rating covers a wide range of performance, supervisors may want to consider the length of time the employee has been in the job as appropriate (i.e., employees in the same job title may be performing satisfactorily but at different levels due to length of time and/or experience on the job.)

UNSATISFACTORY: The employee clearly does not meet performance expectations for one or more tasks, not even at a minimally acceptable level. The employee requires significant extra direction, or the supervisor finds it necessary to avoid assigning normal tasks to the employee. The employee cannot be relied upon to carry out critical assignments in a timely and effective fashion. There is a need for immediate and significant improvement in performance. **Appeal Rights: Only ratings of UNSATISFACTORY are appealable.** Disputes concerning issues such as an employee's performance program, and the rating and appeals process are not subject to appeal. **Employees must file an appeal within 15 calendar days of the receipt of an UNSATISFACTORY rating.** Appeals forms and procedural information are available from your personnel office. **Employees have the right to a personal appearance and to CSEA-designated representation before the Appeals Board.**

* Check the overall rating that best summarizes the employee performance.

If the rating is "unsatisfactory" please type and attach supporting explanation and justification. Attachment and notes related to this attachment are optional.

**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.*

9.) 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.

You can go ahead and click OK.

10.) After you click OK, the next screen will be the routing list (who needs to see/acknowledge) this CSEA Annual Evaluation/Appraisal:

The screenshot shows the Hirezon/Interview Exchange interface. At the top, there is a navigation bar with links for 'Welcome: Test Oswego', 'Account', 'Notifications (2)', 'Help', 'Instructions', and 'Logout'. The user is identified as 'SUNY Oswego' with a 'Switch Module' button. Below this is a red navigation bar with 'Dashboard' selected and other options: 'Assigned to Me', 'My Reviews', 'My Team Reviews', 'Start Review', 'Action Items', and 'Guest Review'. The main content area displays the profile for Leah Holmes, an Administrative Assistant at Test Oswego, with a review period of 2022-2023 in the Career Services department. A 'Routing List' section follows, containing a text box for the employee's acknowledgment and a section for supervisor comments. Below these are four routing items in a table:

| Order | Role | Name | Status | Action |
|-------|---------------------------|---------------------|----------|--------|
| 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 | |


At the bottom of the routing list, there are four action buttons: '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, your name will also be auto populated. Next to acknowledge, the Next Level Supervisor. You will need to enter in this individual and 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.

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

Approval for Performance Review [Employee: Leah Holmes] External ▸ Inbox x

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

3:02 PM (0 minutes ago)

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

How to Find Direct Report CSEA Annual Evaluation/Appraisal in Process

1.) Click on My Team Reviews tab on the top of your Dashboard, then click on the year the CSEA Annual Evaluation/Appraisal was for:

The screenshot shows the Hirezon Interview Exchange dashboard. At the top, there is a navigation bar with links for 'Welcome: Test Oswego', 'Account', 'Notifications (7)', 'Help', 'Instructions', and 'Logout'. Below this is a secondary navigation bar with 'Dashboard', 'Assigned to Me', 'My Reviews', 'My Team Reviews' (highlighted with a blue arrow), 'Start Review', 'Action Items', and 'Guest Review'. Underneath, there is a section for 'My Team Reviews' with a dropdown menu for 'YEAR 2023' (indicated by a blue arrow) and a button for 'ADHOC REVIEWS'. The user's name 'SUNY Oswego' and a 'Switch Module' button are visible in the top right corner.

2.) The drop-down menu will give you information on what is in process and who the CSEA Annual Evaluation/Appraisal is sitting with for approval:

The screenshot shows the 'My Team Reviews' section of the dashboard. It features a table with the following columns: EMPLOYEE, SCORE, APPROVER, CREATED, UPDATED, COMPLETED, STATUS, and SELF-REVIEW. The table contains one entry for Leah Holmes. The 'STATUS' column for Leah Holmes is 'Routing - In-Progress'. There is a magnifying glass icon next to Leah Holmes' name. Below the table is a button for 'ADHOC REVIEWS'. The top navigation bar is identical to the previous screenshot.

| 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 CSEA Annual Evaluation/Appraisal *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 CSEA Annual Evaluation/Appraisal

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

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:

Assigned to Me

1 form(s) for Action

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

Forms for Review

| EMPLOYEE | SUPERVISOR | CREATED | UPDATED | COMPLETED | STATUS |
|-----------------------------|-------------|-------------------------|-------------------------|-----------|-----------------------|
| Leah Holmes | Test Oswego | 06/12/2023 12:19 PM EST | 06/12/2023 12:27 PM EST | --- | Routing - In-Progress |

Upcoming Forms for Review

Reviewed Forms

4.) Click on the employee’s name in blue and the form will pop up. Review the CSEA Annual Evaluation/Appraisal, 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 - those will be green if there is a discussion/comment entered within that section for you to review.). Scroll to the bottom and you will see the routing list:

Performance Review

| Question | Response |
|--|--------------|
| 0 * Check the overall rating that best summarizes the employee performance. | Satisfactory |
| 0 If the rating is "unsatisfactory" please type and attach supporting explanation and justification. | |

Routing List

Employee: I met with my supervisor to discuss my work performance. I have read this evaluation and discussed it with my supervisor. My signature as acknowledgement does not necessarily signify that I agree with this evaluation.

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.

| # | Position | Name | Status |
|---|---------------------------|------------------|--|
| 1 | Employee | Leah Holmes | Acknowledged (10/23/2023 09:46 AM EST) |
| 2 | Supervisor | Test Oswego | Current Approver |
| 3 | Next Level Supervisor | Oswego Templates | Not Sent |
| 4 | HR Admin - Personnel File | Human Resources | Not Sent |

Comments

Acknowledge Receipt
Edit and Resend

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

a.) **Acknowledge Receipt**- which means you are finalizing the CSEA Annual Evaluation/Appraisal 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:

The screenshot shows the Hirezon Interview Exchange dashboard. At the top, there is a navigation bar with 'Dashboard', 'Assigned to Me', 'My Reviews', 'My Team Reviews' (highlighted with a blue arrow), 'Start Review', 'Action Items', and 'Guest Review'. Below this, there is a section for 'My Team Reviews' with a sub-tab for 'YEAR 2023' (highlighted with a blue arrow). Underneath, there is a button for 'ADHOC REVIEWS'.

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

The screenshot shows the Hirezon Interview Exchange dashboard with a table of 'My Team Reviews' for 'YEAR 2023'. The table has columns for EMPLOYEE, SCORE, APPROVER, CREATED, UPDATED, COMPLETED, STATUS, and SELF-REVIEW. A row is visible for Leah Holmes with a paper and pencil icon in the EMPLOYEE column.

| 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 |

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 CSEA Annual Evaluation/Appraisal will become a permanent part of the file.*

How to Find Completed Direct Report CSEA Annual Evaluation/Appraisal

1.) Once the HR Office reviews, acknowledges, and files the CSEA Annual Evaluation/Appraisal 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 CSEA Annual Evaluation/Appraisal 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 CSEA Annual Evaluation/Appraisal, 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:



Employee: Leah Holmes
Position: Administrative Assistant
Supervisor: Test Oswego
Created: 06/12/2023 01:54 PM EST

Review Period: Year 2023
Department: Career Services
Discussions: 0
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.

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>.