How to Guide:

Professional Employee Performance Program & Evaluation

Employee View

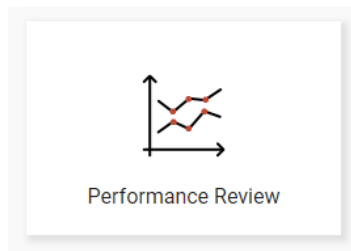Hirezon/Interview Exchange
Performance Review Module

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Login to Interview Exchange

1. Click here to sign into Hirezon/Interview Exchange using single sign on. If you do use the old link it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).

2. You will then enter your Laker NetID and password, click Login and it will direct you to the main Hirezon/Interview Exchange page.

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

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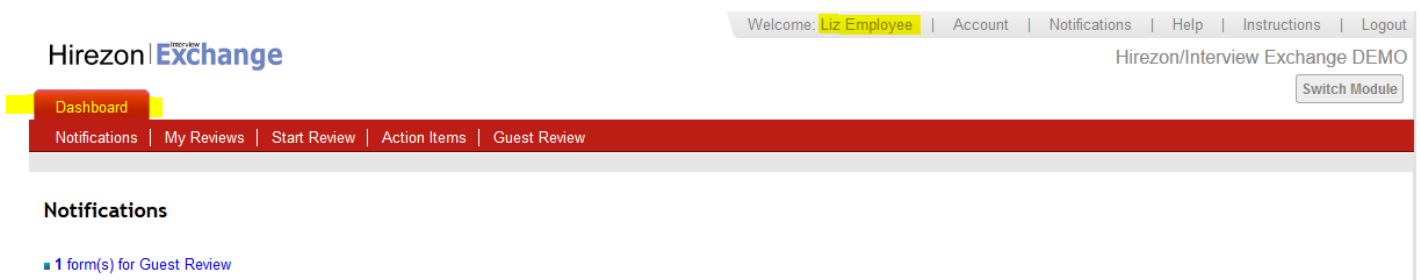
3. Click on this icon:

Performance Review

4. This will bring you to your main Dashboard.

Dashboard

Employee View

Employee Dashboard Tabs

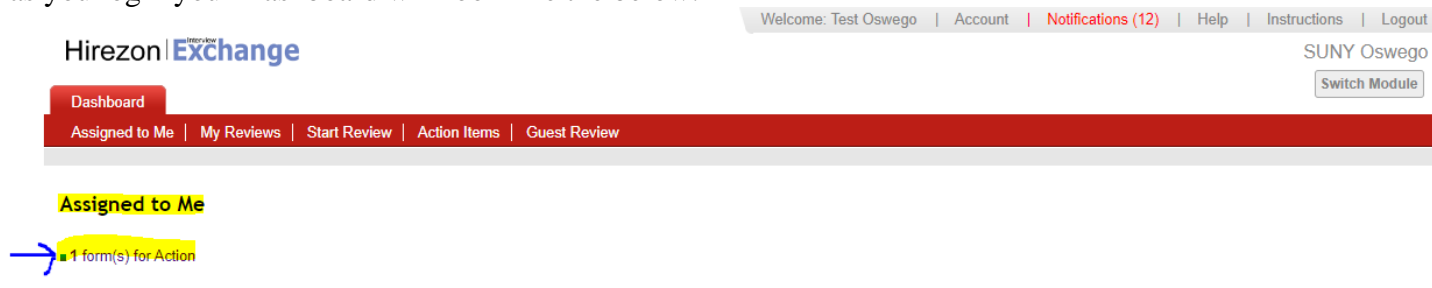|	Description
Dashboard	Your personalized landing page after login.
Notifications	Displays all pending work.
My Reviews	Displays your Evaluation Form(s) and review(s)
Start Review	This page displays only when self-appraisal feature is enabled in your account. Appropriate template Forms are available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

** Not available to all users.

How to Review/Acknowledge Your Performance Program

1.) You will receive an email notification once your supervisor sends you the performance program they have prepared:
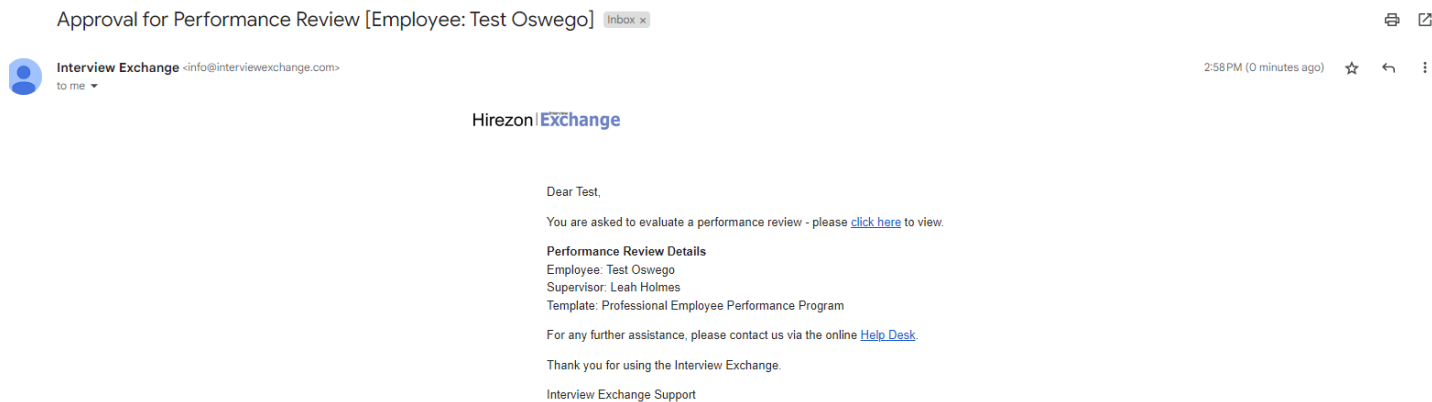
2.) Login to your Hirezon/Interview Exchange account and go into the Performance Review module. As soon as you login your Dashboard will look like the below:

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

Hirezon | Exchange

SUNY Oswego

Switch Module

Dashboard

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

Forms for Review

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

➕ **Upcoming Forms for Review**

➕ **Reviewed Forms**

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

Performance Review

Professional Employee Performance Program

SUNY Oswego

Employee:	Test Oswego	**Review Period:**	Year 2023
Position:	Admissions Coordinator	**Department:**	Admissions
Supervisor:	Leah Holmes	**Discussions:**	0
Created:	06/08/2023 01:55 PM EST	**Completed:**	---

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.

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

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

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

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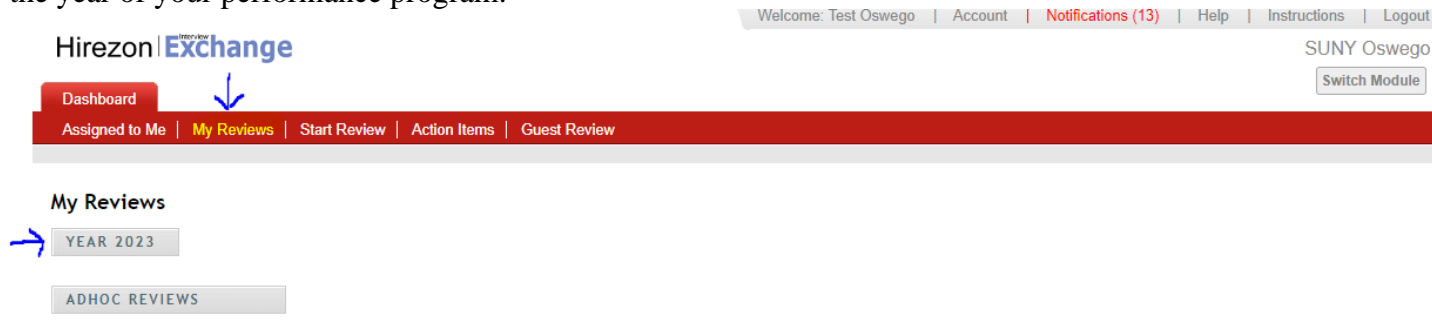
Note: all discussions/comments made within the performance program will become a permanent part of the performance program file.

How to Find Completed Performance Program

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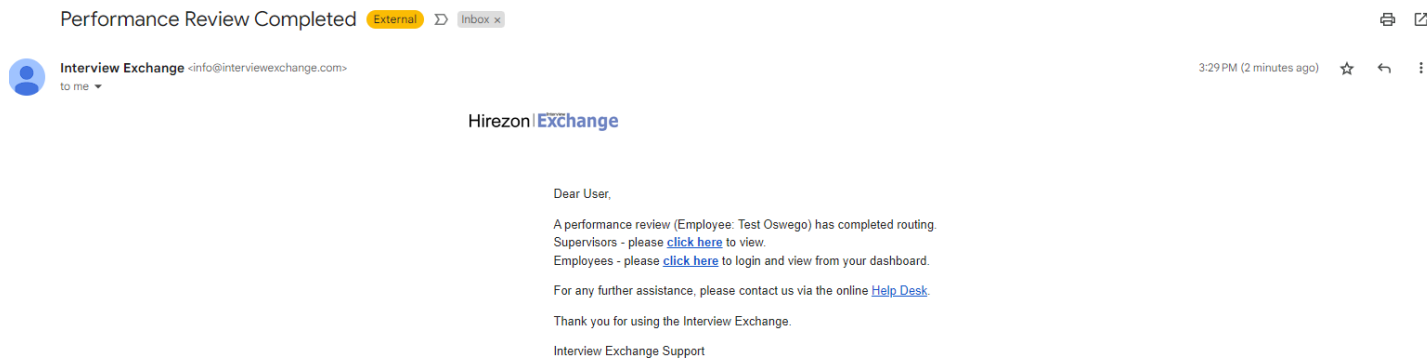
2.) Login to your Hirezon/Interview Exchange account and click on My Reviews tab on your Dashboard, then the year of your performance program:

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

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

How to Review/Acknowledge Your Evaluation

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

Interview Exchange <info@interviewexchange.com> to me ▾ 1:25 PM (26 minutes ago) ☆ ↩ ⋮

Hirezon | 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

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

Welcome: Test Oswego | Account | Notifications (12) | Help | Instructions | Logout

Hirezon | Exchange   SUNY Oswego

Switch Module

Dashboard

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

Assigned to Me

→ ▪ 1 form(s) for Action

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

Welcome: Test Oswego | Account | Notifications (12) | Help | Instructions | Logout

Hirezon | Exchange   SUNY Oswego

Switch Module

Dashboard

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

Forms for Review

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

➕ **Upcoming Forms for Review**

➕ **Reviewed Forms**

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

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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

<u>Supervisor:</u> 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.

<u>Employee:</u> You will receive an email to review the evaluation that was prepared by your supervisor. You will be given the option to make comments throughout the evaluation and within the text box before you electronically acknowledge receipt of the evaluation. You can then either return the evaluation back to your supervisor for a second review/ability to make changes or you can electronically acknowledge receipt and submit forward. Please meet with your supervisor in-person/virtually to review and discuss the evaluation before electronically acknowledging receipt and submitting. After HR acknowledges the evaluation, the final copy will be in your dashboard when

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

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

b.) **Return to Supervisor**- if you'd like to make comments throughout your evaluation and any suggested changes for your supervisor to review you can go ahead and add those by clicking on any of the gray talking bubbles [0] that are throughout the evaluation. Click on one of those and you can start a discussion and save. Your supervisor will then be able to read those. Once you are finished making comments/suggestions click on the Return to Supervisor button at the bottom.

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

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

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

How to Find Completed Evaluation

1.) Once your evaluation has been acknowledged by yourself, your supervisor, the next level supervisor, and the HR Office, you will receive an email notification that your evaluation is complete.
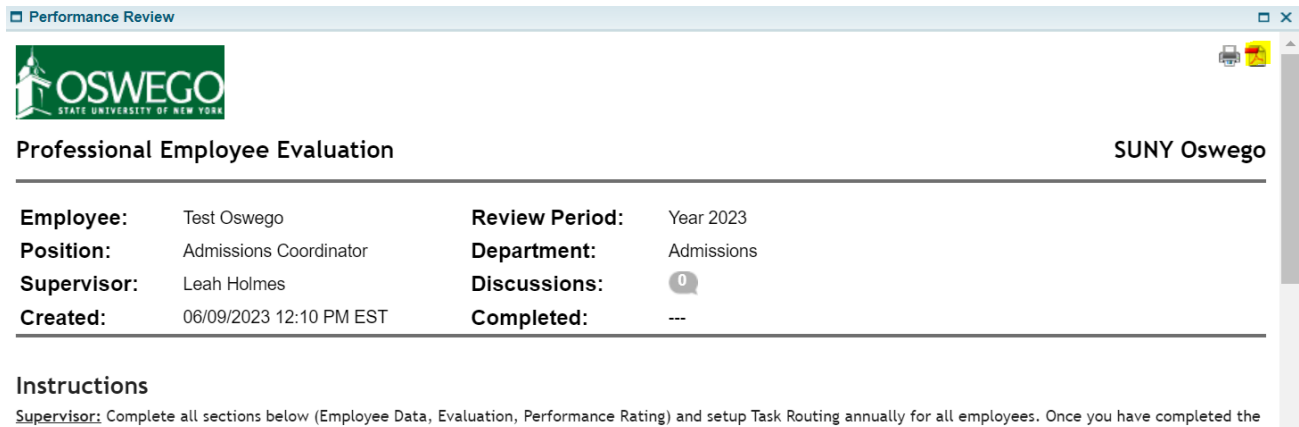
2.) Login to your Hirezon/Interview Exchange account and click on My Reviews tab on your Dashboard, then the year of your evaluation:
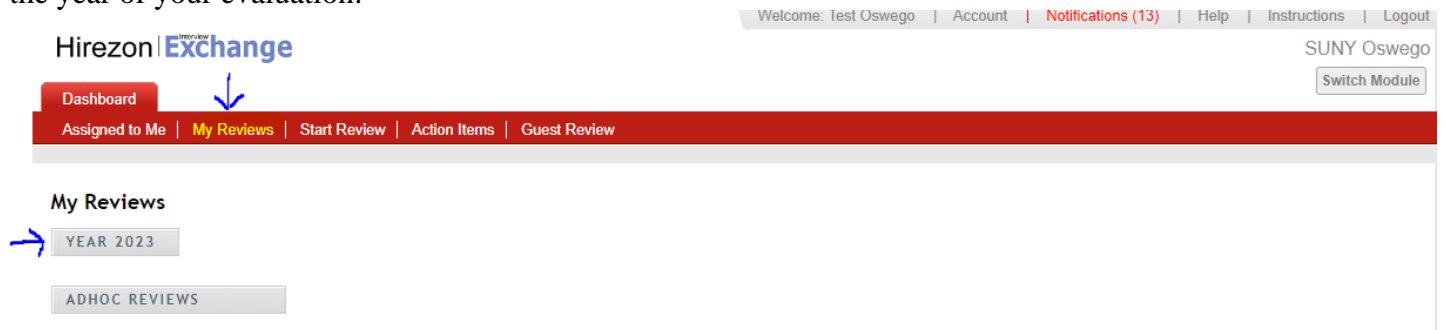
3.) Click on the person icon on the left of the evaluation form:
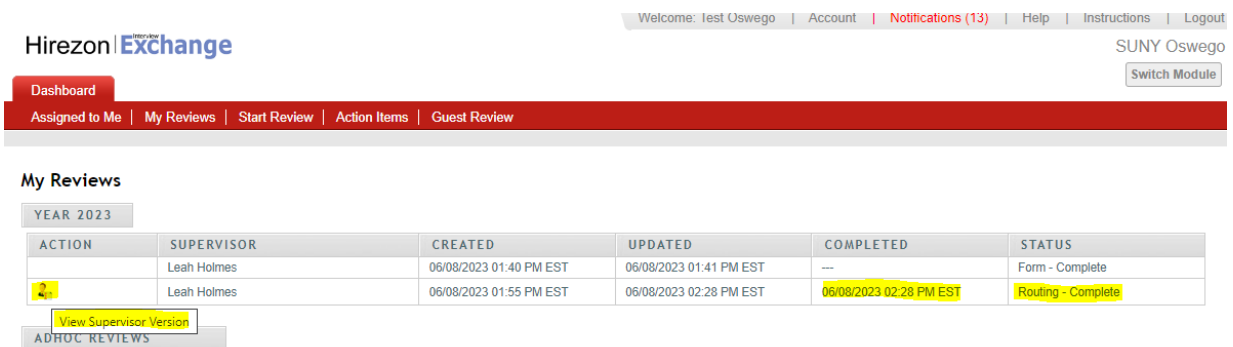
4.) The final evaluation will pop up. You can then download into a PDF and save for your own records with all acknowledgments documented:

FAQ's & Useful Information

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

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