How to Guide:

CSEA Performance Program, Six-Month Recertification, Evaluation/Appraisal

Supervisor View

Hirezon/Interview Exchange
Performance Review Module

October 2023/ Revised September 2025

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Log in to Interview Exchange

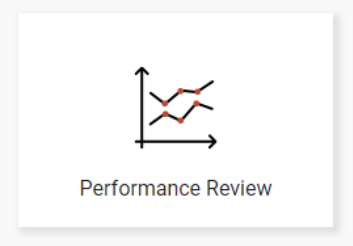
1. Click here to sign into Hirezon/Interview Exchange using single sign on. If you do use the old link it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).

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 log in 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 log in with your individual Hirezon/Interview Exchange account credentials (email address and associated password) through this link.

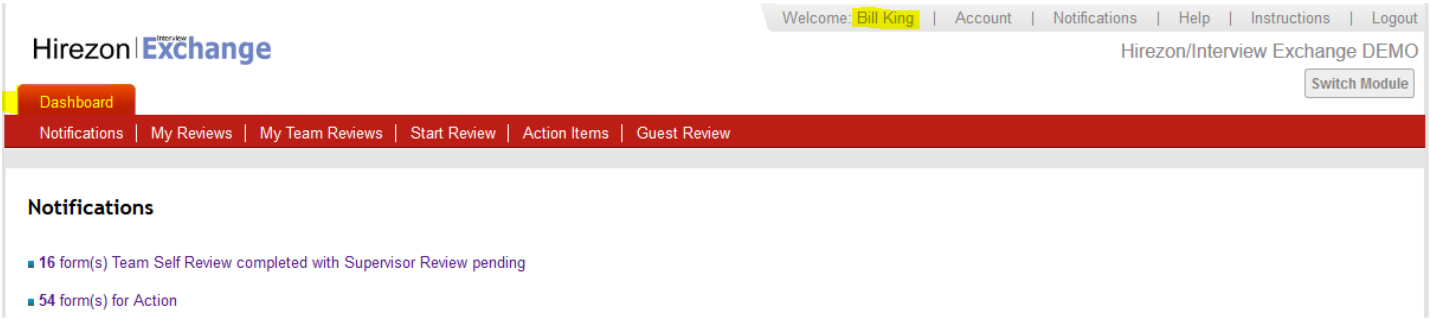
3. Click on this icon:



4. This will bring you to your main Dashboard.

Dashboard

Supervisor View



Supervisor Dashboard Tabs

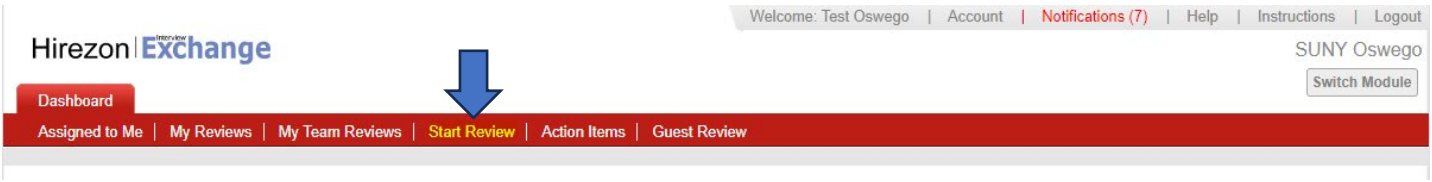
	Description
Dashboard	Your personalized landing page after login
Assigned to me	Displays all pending work.
My Reviews	Displays your Evaluation Form(s) and review(s)
My Team Reviews	Displays the Evaluation Form(s) and review(s) of your employees only.
Start Review	Enables you to create and customize an 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.

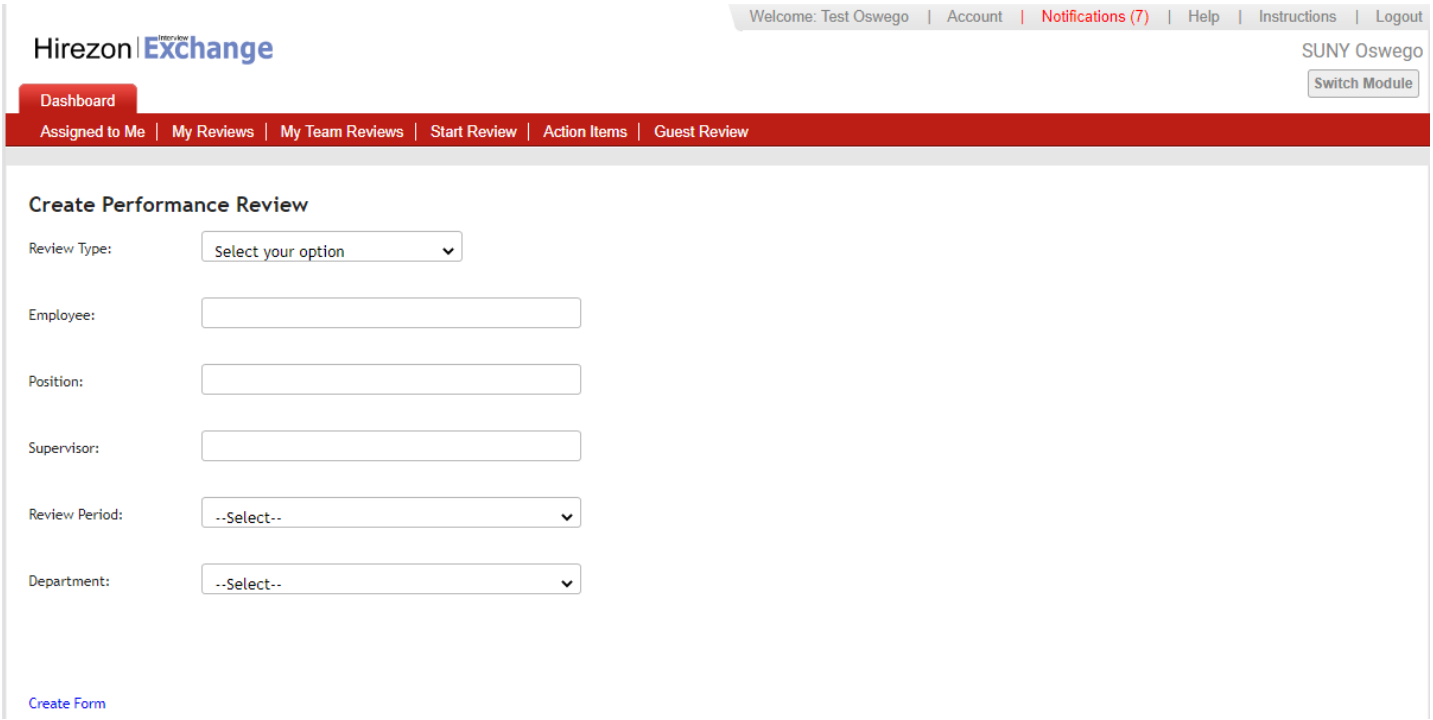
Supervisors have the **My Team Reviews tab to complete performance programs and evaluations on direct reports.*

How to Start New CSEA Performance Program

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



It will then take you to the following screen:



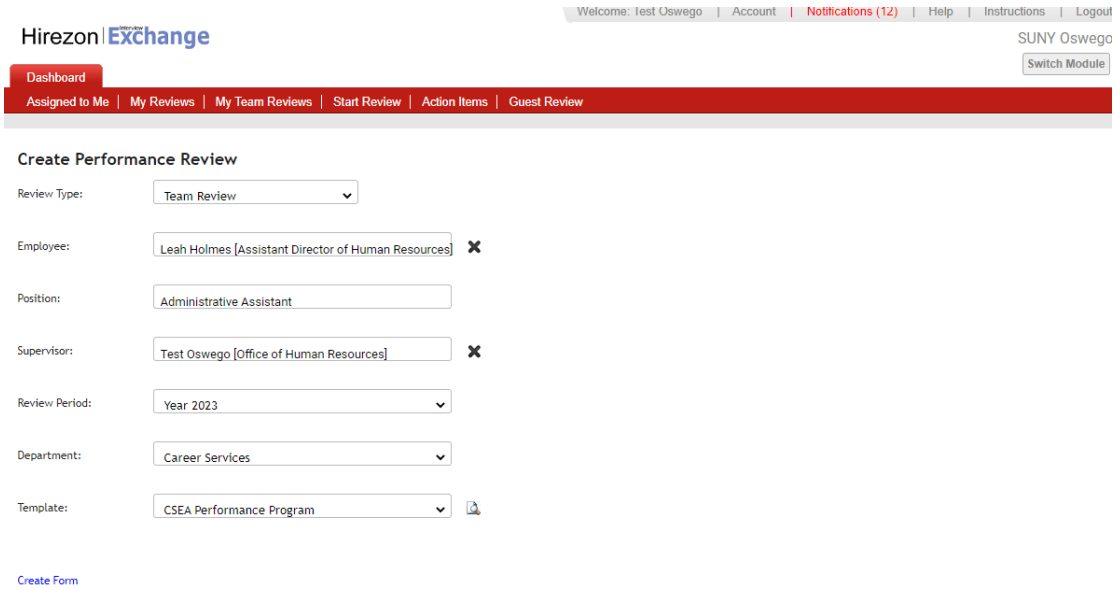
2.) Fill in all the requested information and click Create Form:

Review Type: Will be Team Review when completing a form for a direct report.
Employee: Type in your direct report's name. It should auto populate. Click on their name.

**If their name doesn't auto populate that means they do not have access to the performance module. Contact hr@oswego.edu and Human Resources will grant them access.*

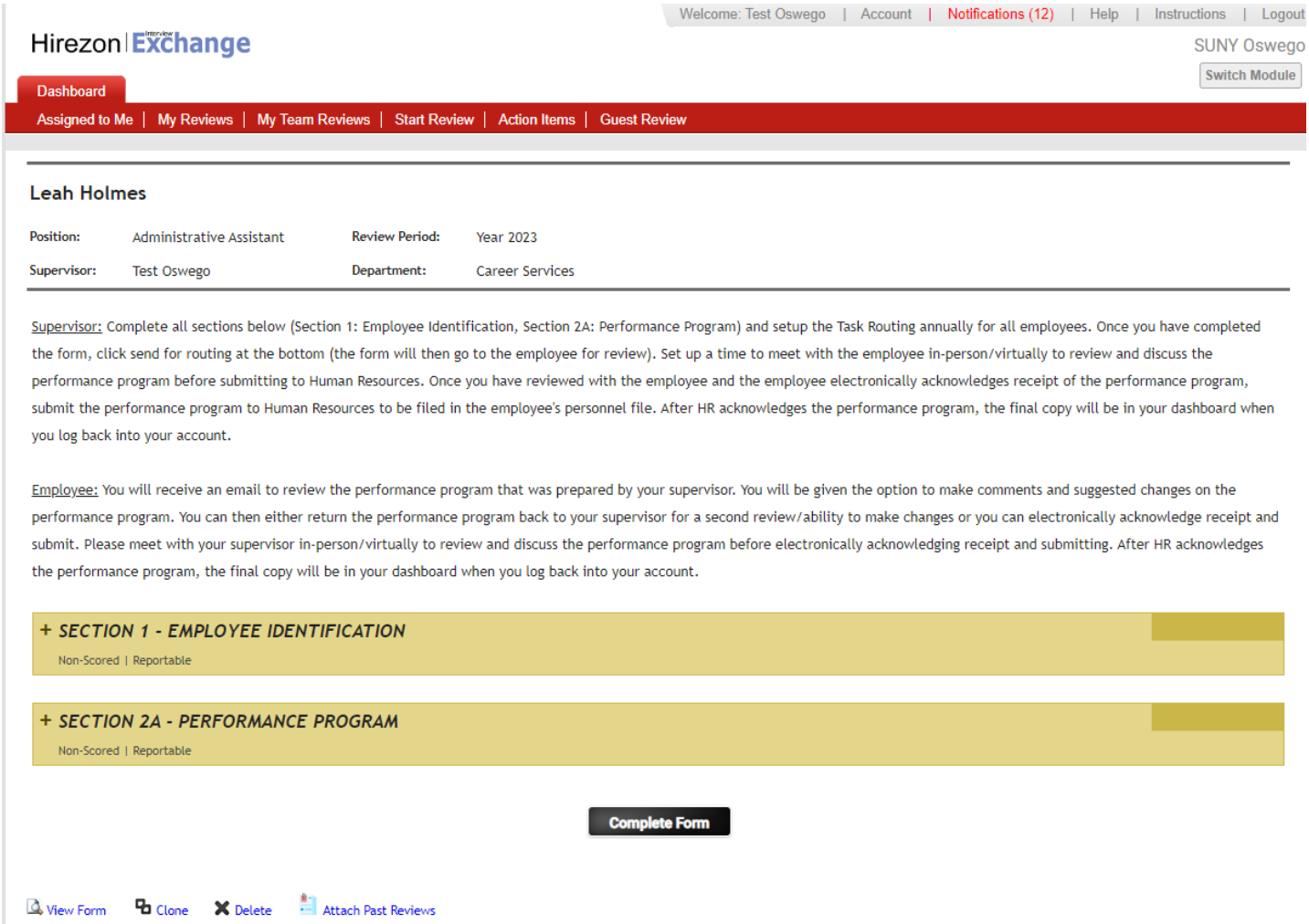
***If the title of the employee is incorrect next to their name, the employee must log in to their Interview Exchange account and edit their profile to update the title to their current title.*

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: Select your direct report's department from the drop down.
Template: You will see all active templates- choose *CSEA Performance Program*.

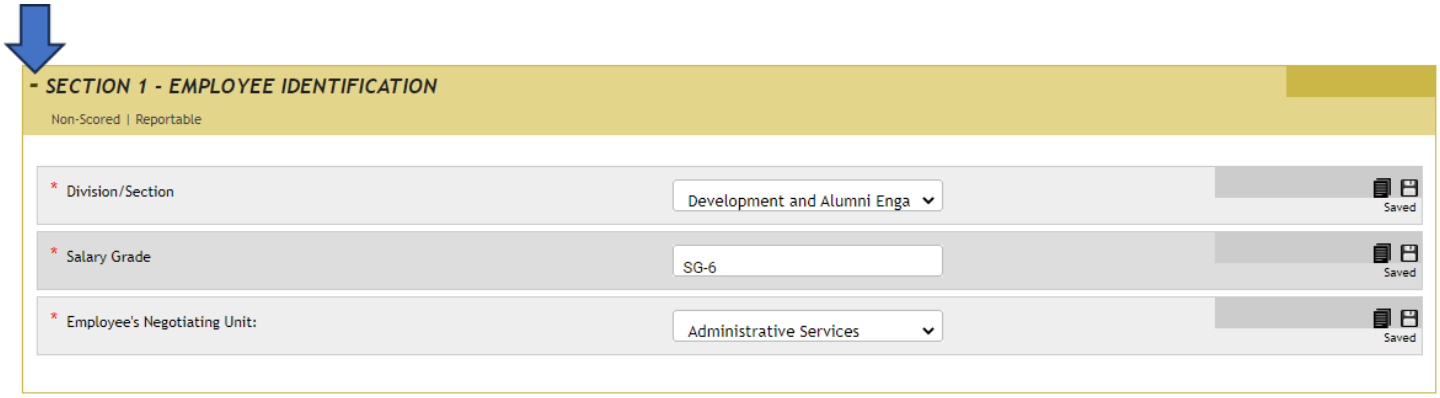


3.) The next screen will be the CSEA Performance Program form for you to complete.

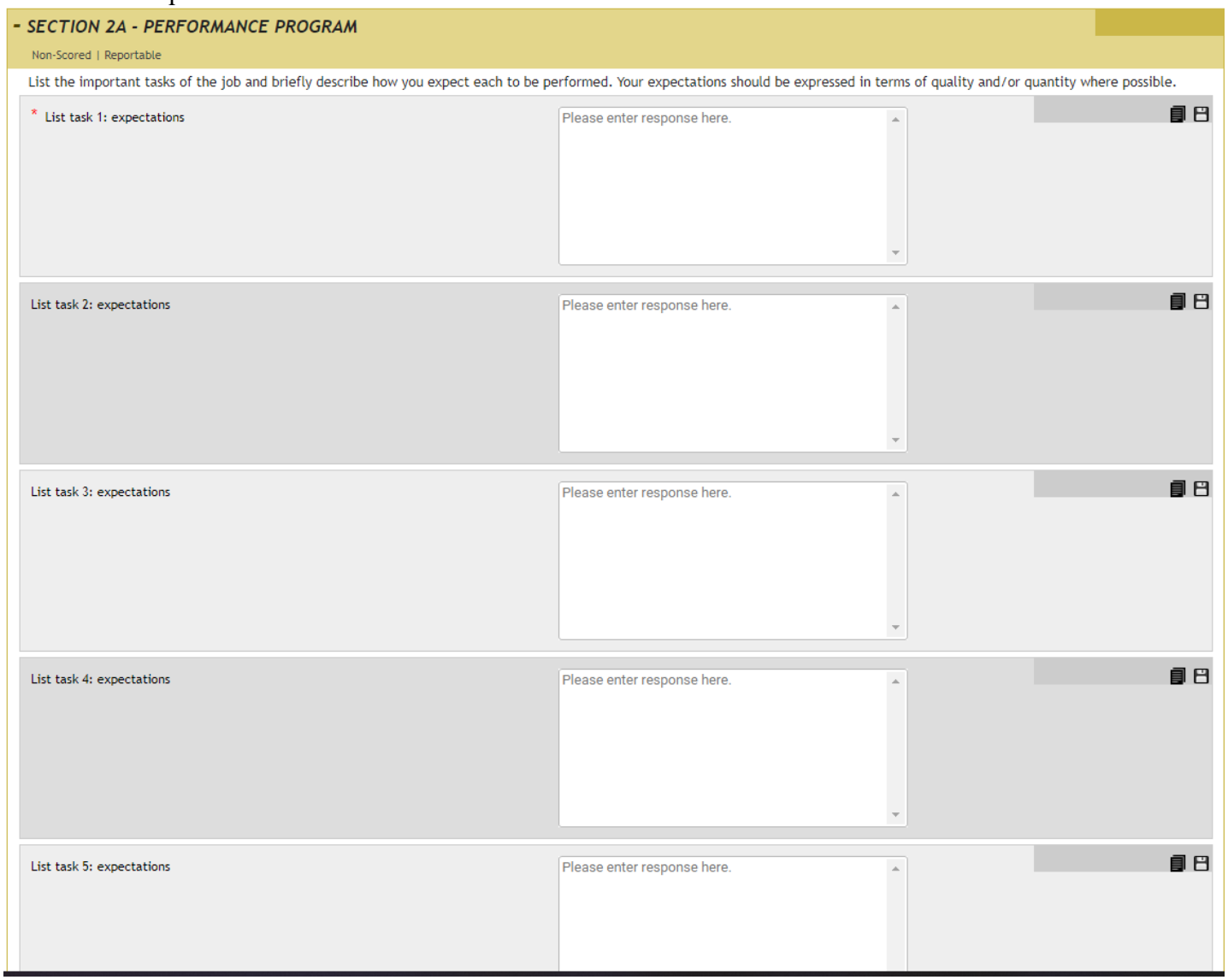
**There are instructions at the top for your review.*



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



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

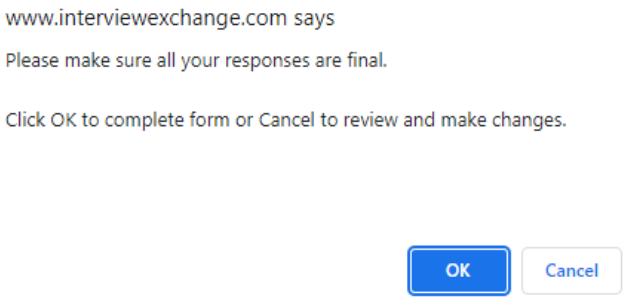


**The form is the same as the paper version you are used to working with. There are no language changes.*

**Note: As you use this system year after year, content will be saved. Each year, you can copy the 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.*

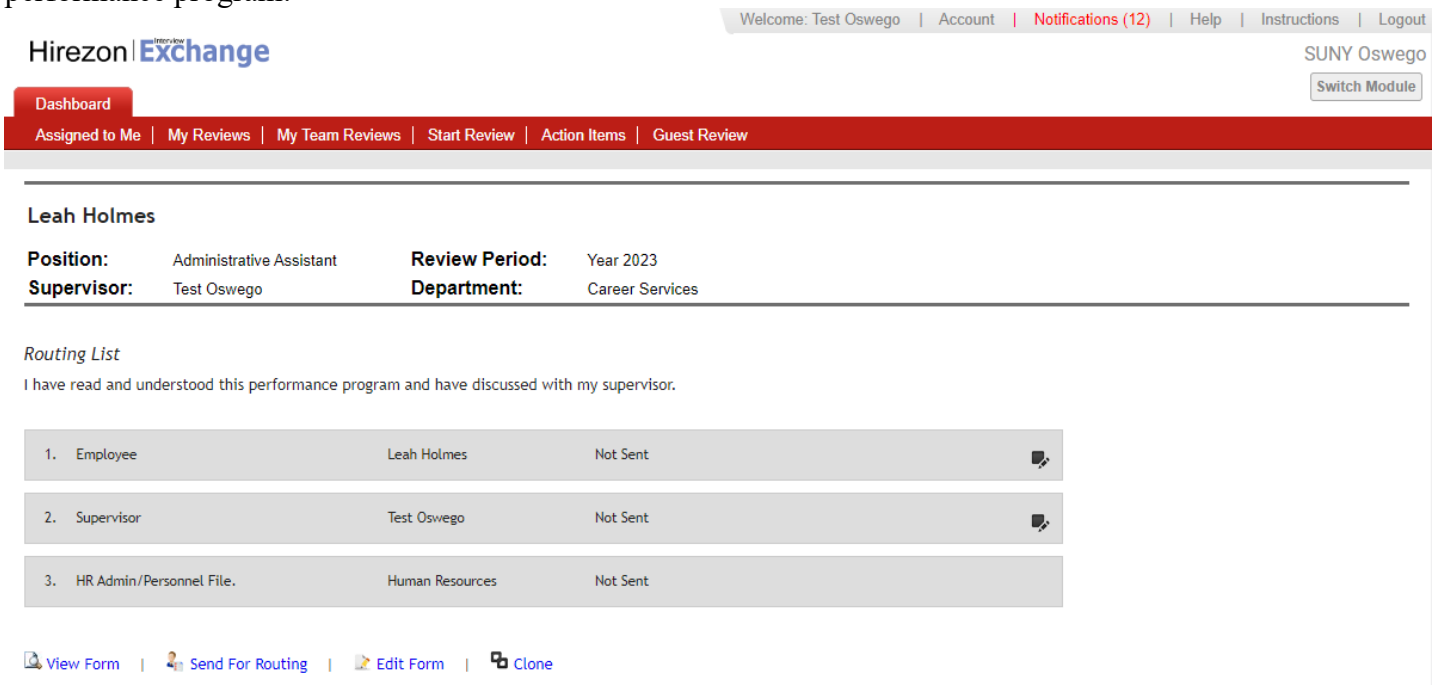
6.) Once you have finished entering all the information, click the Complete Form box at the bottom:

You will get this notification box:



When all your responses are final, click OK.

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

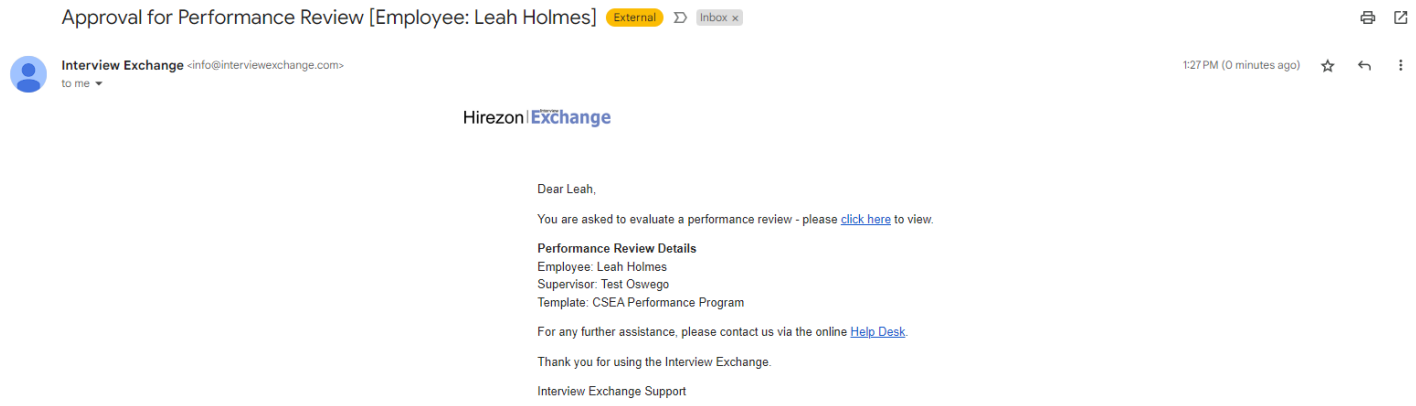


The employee (direct report) will be auto populated as the first person to review. As the immediate supervisor,

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.

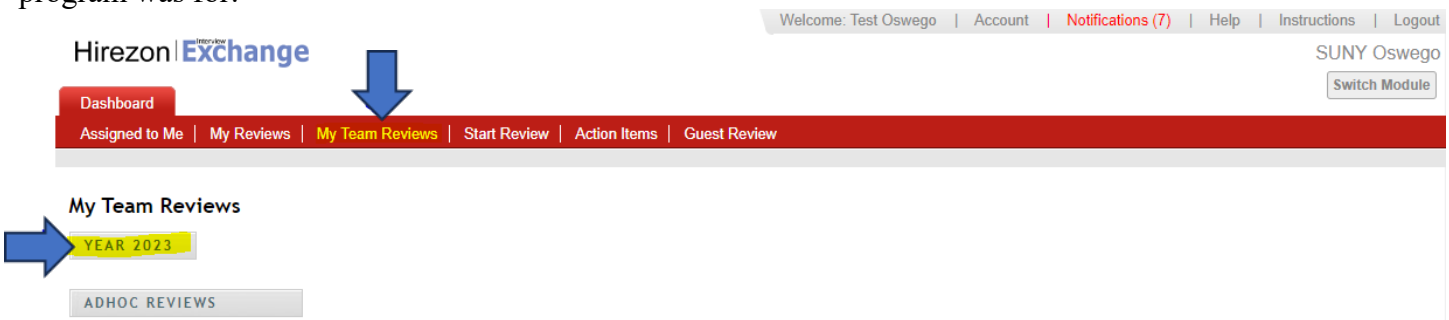
Once you have the routing list completed, click Send for Routing at the bottom.

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:

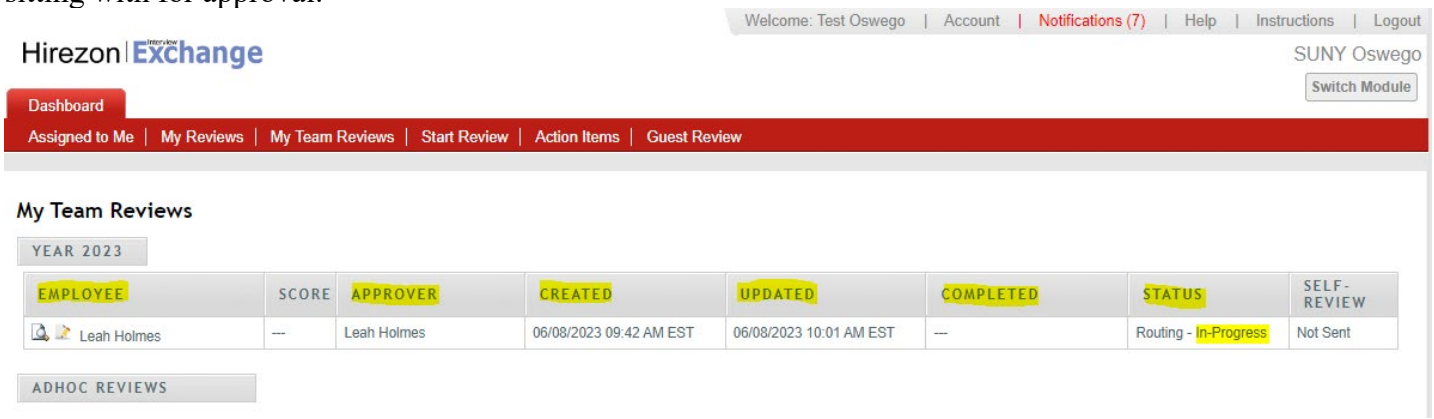


How to Find Direct Report CSEA Performance Programs in Process

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



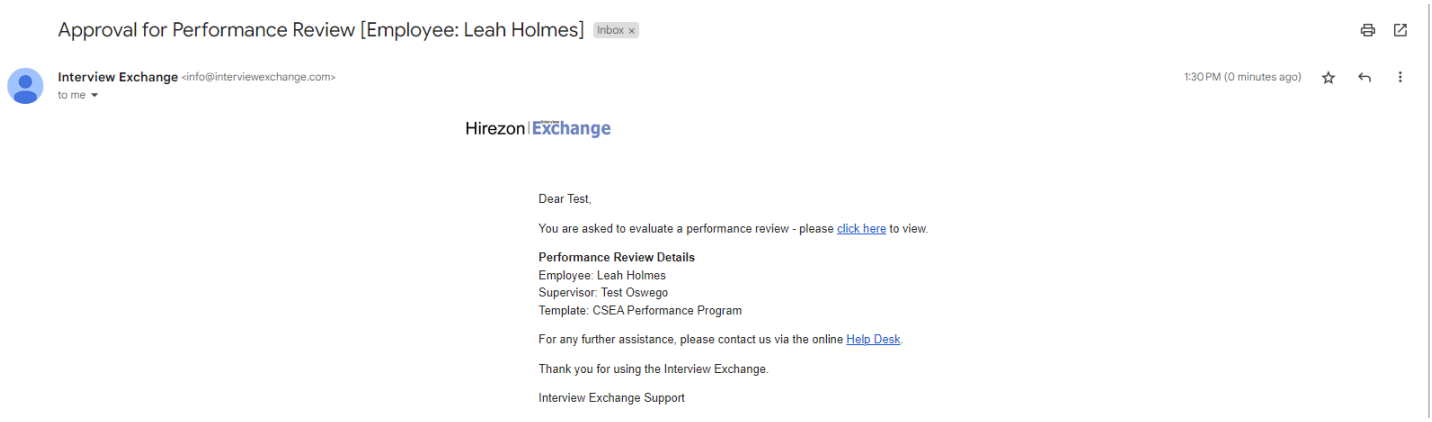
2.) The drop-down menu will give you information on what is in process and who the performance program is sitting with for approval:



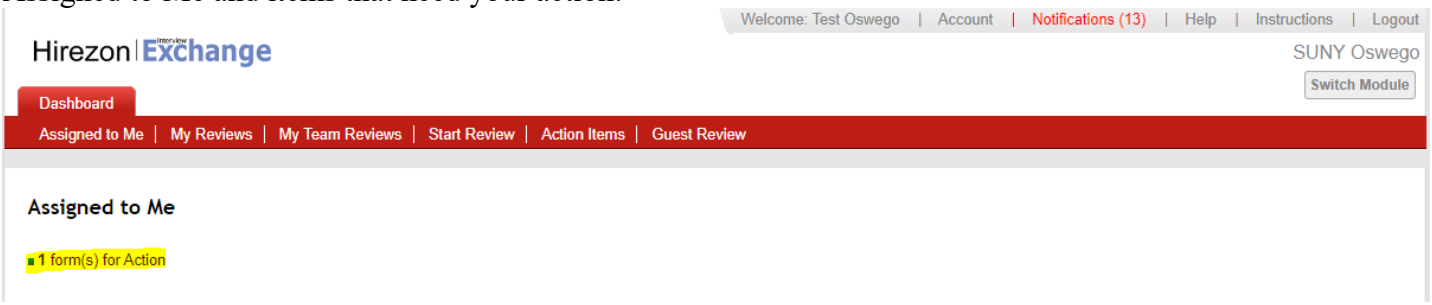
a.) You can click on the paper with magnifying glass next to the employee's name to view the performance program. *You can download into a PDF or print if needed- if you'd like to bring a physical copy to the meeting with your employee. If you do this, please remember this is NOT the final copy. The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

How to Review/Acknowledge Direct Report CSEA Performance Program

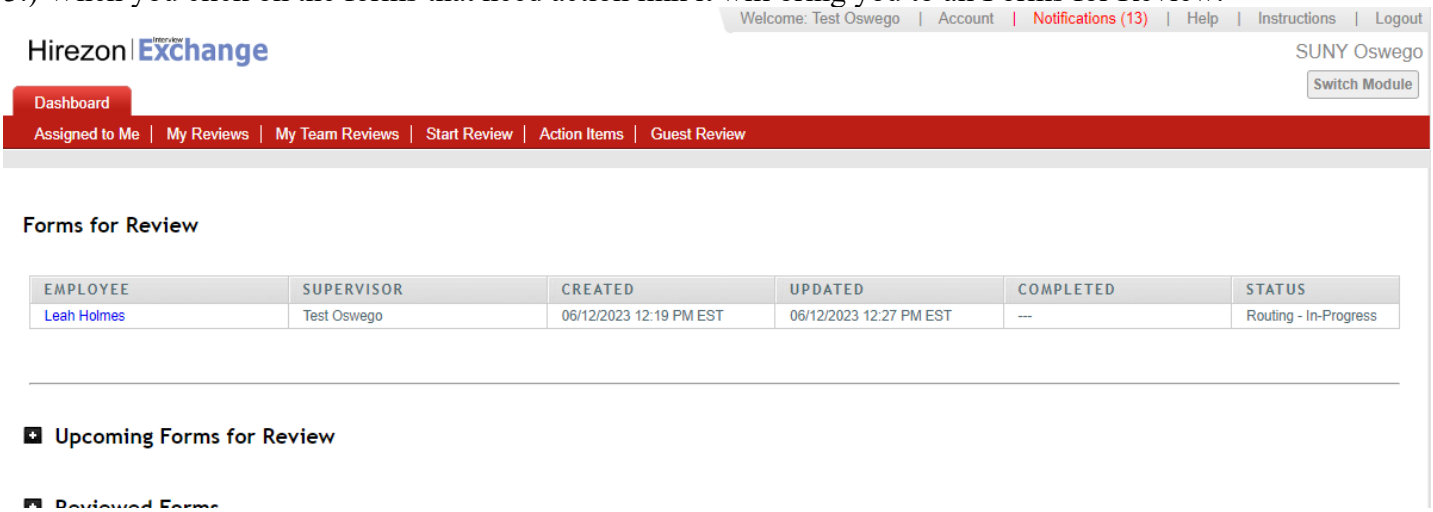
1.) You will receive an email notification once your direct report has either approved/acknowledged their performance program OR they sent the performance program back to you with comments/suggestions on items they would like for you to review and possibly make adjustments/changes to the performance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



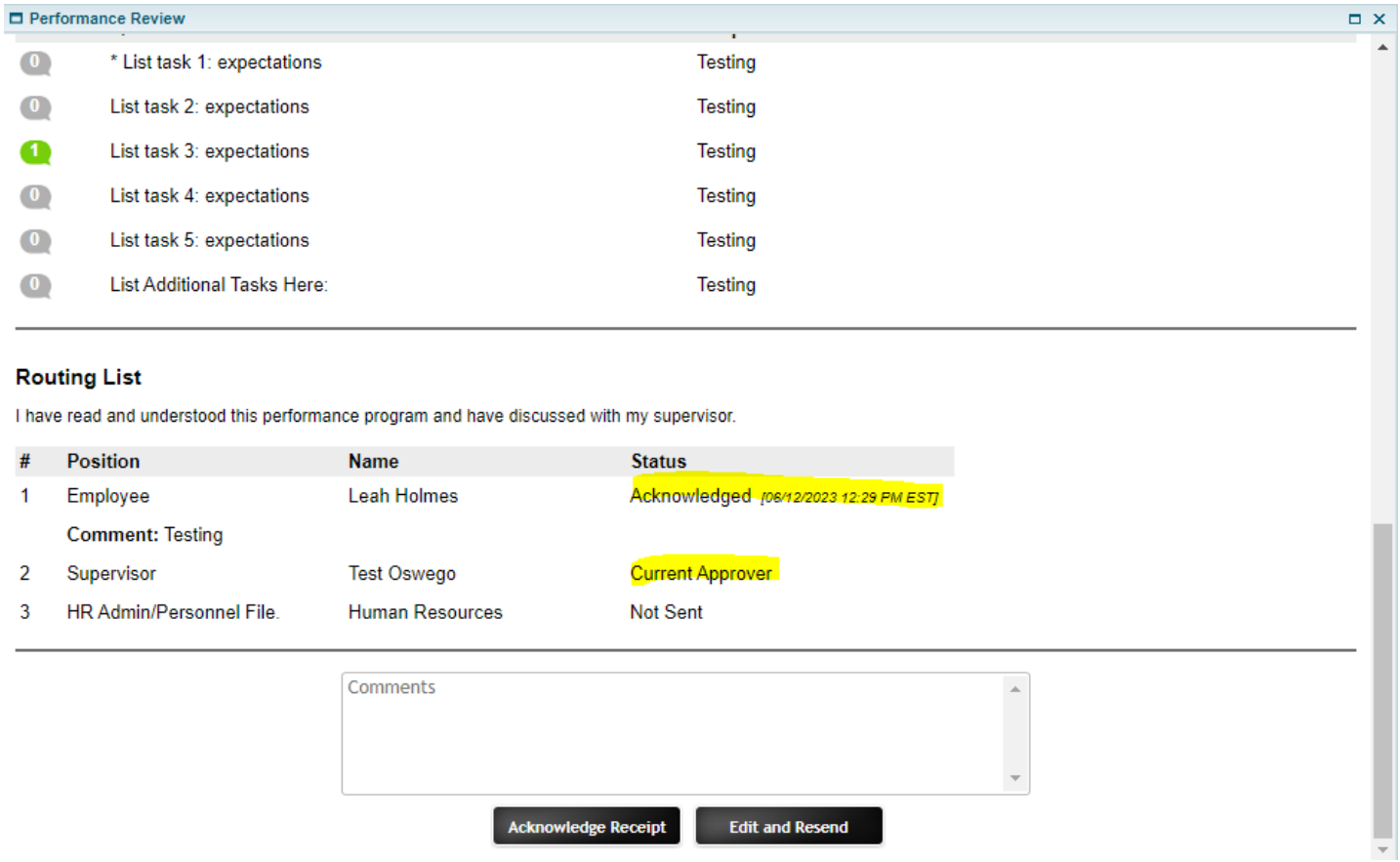
2.) Once you log in to your Hirezon/Interview Exchange account, this will be the first screen you see- Assigned to Me and items that need your action:



3.) When you click on the forms that need 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 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 0 - they 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:

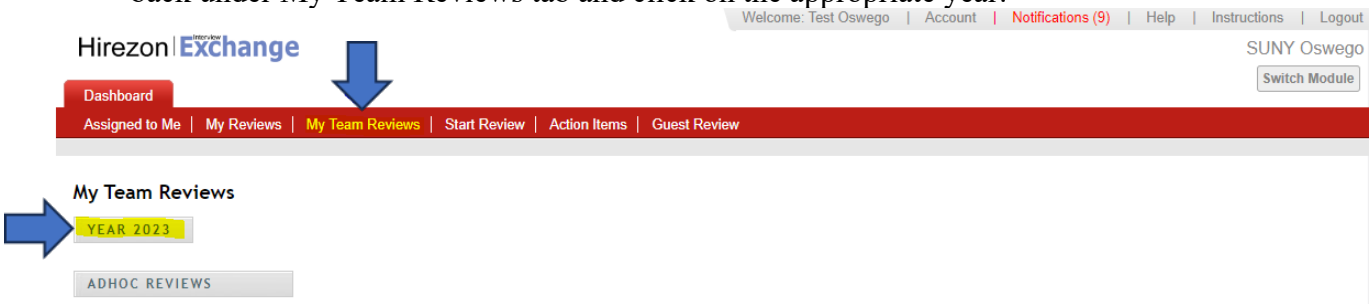


5.) You will see the employee either acknowledged the performance program or sent back to you for suggested changes. Review the performance program and you have two options:

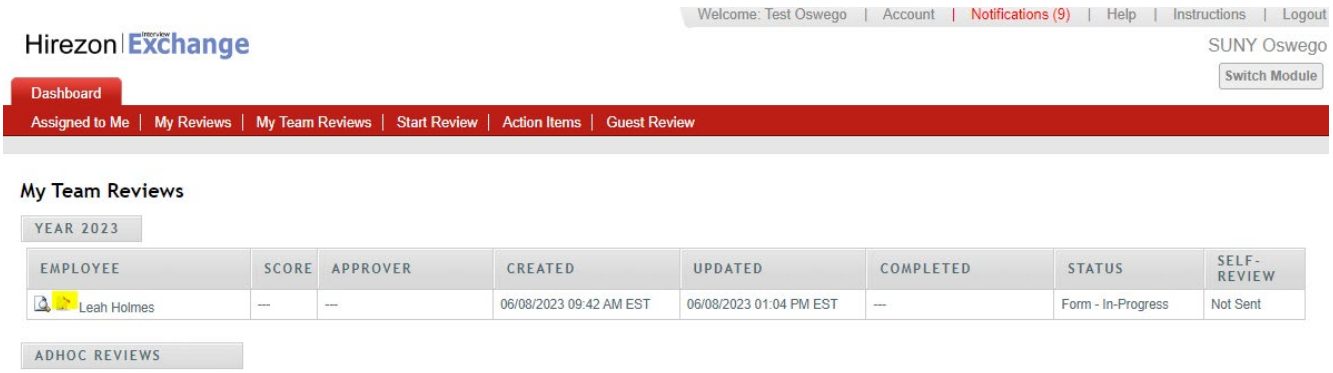
a.) **Acknowledge Receipt-** which means you are finalizing the performance program, and it will be sent to the HR Office to be filed in the employee's personnel file.

b.) **Edit and Resend-** you can make last minute changes if needed and send 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:



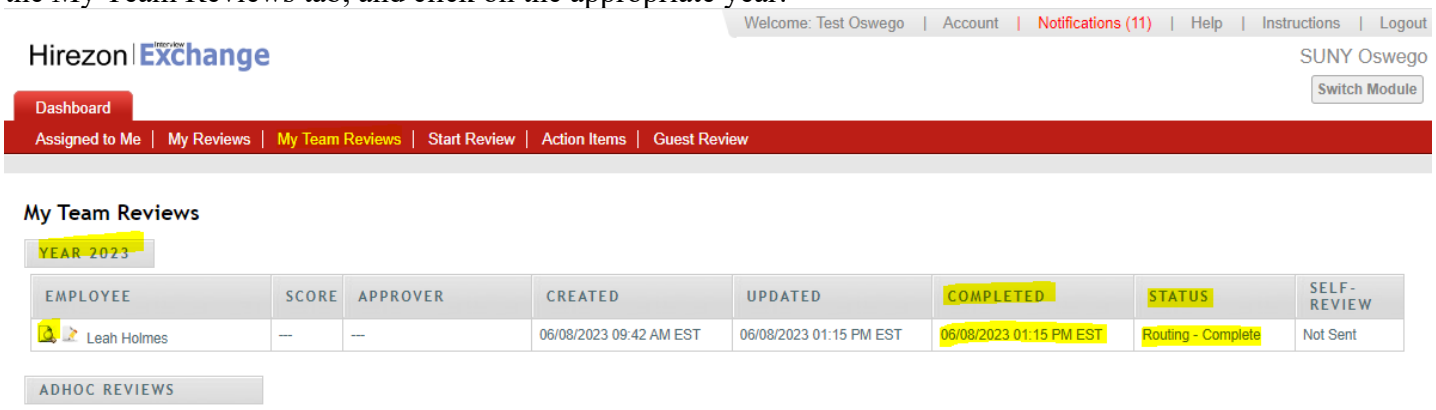
iii.) Make the necessary changes, scroll to the bottom- click Complete Form, then on the next screen verify the routing list again and click Send for Routing at the bottom. This will be sent back to the employee for their review/acknowledgment.

**Note: all discussions/comments made within the 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.

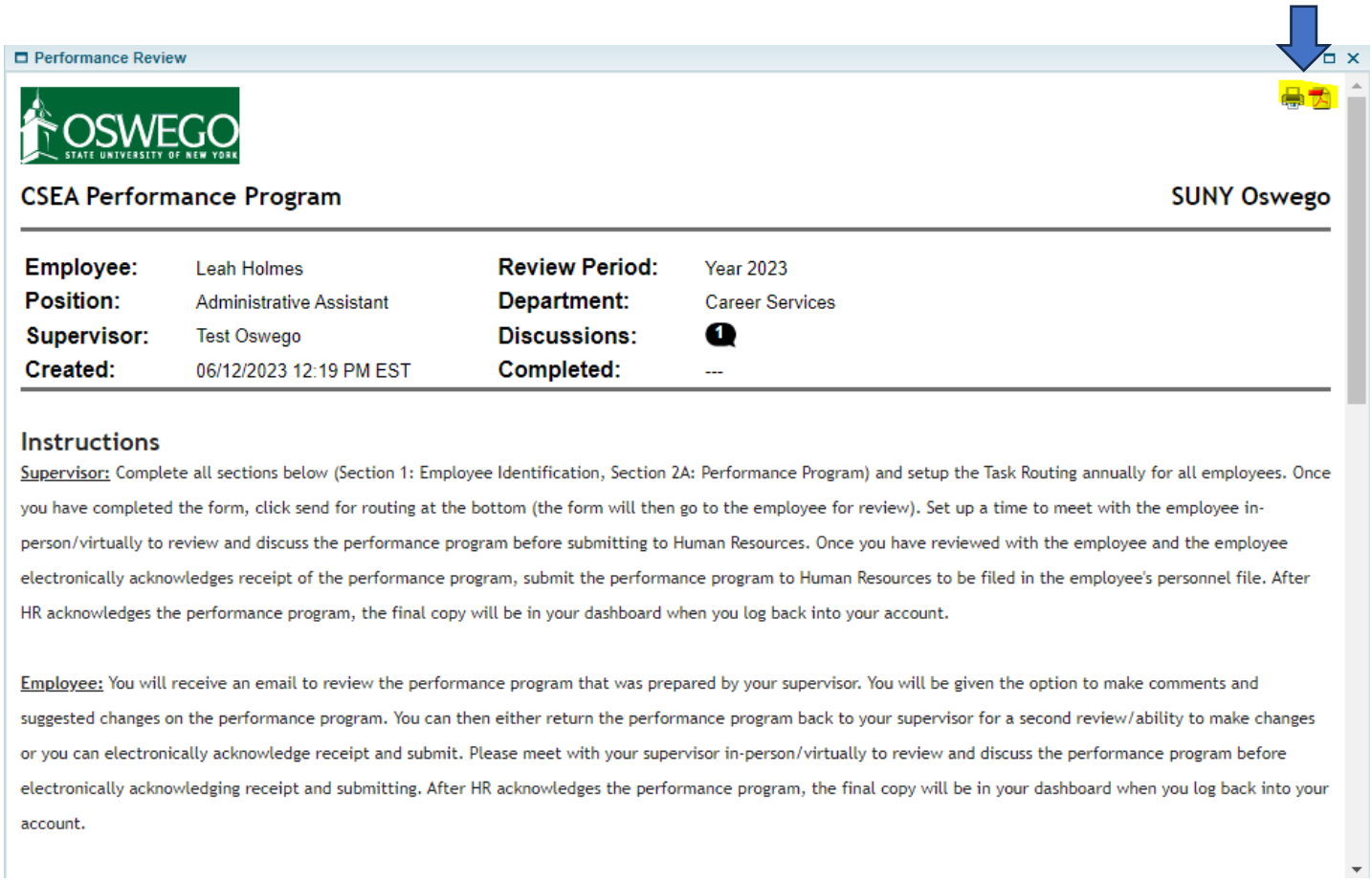
2.) You can log in to your Hirezon/Interview Exchange account and find the final performance program under the My Team Reviews tab, and click on the appropriate year:



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

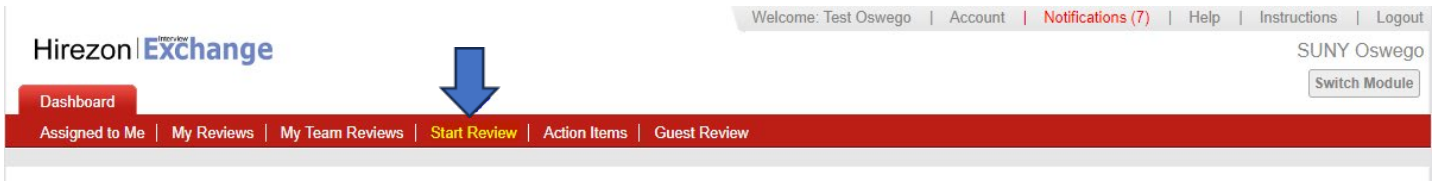
b.) You can then click on the paper with magnifying glass icon to view, when you scroll to the bottom of the performance program, you'll see all approvers have acknowledged the form with a date and time.

c.) Next, you can use the print or save icons (highlighted on the next page) to print or save a copy of the performance program to an external folder. **At this time, you should download a copy of the performance program and send it to your (evaluator's) supervisor.**

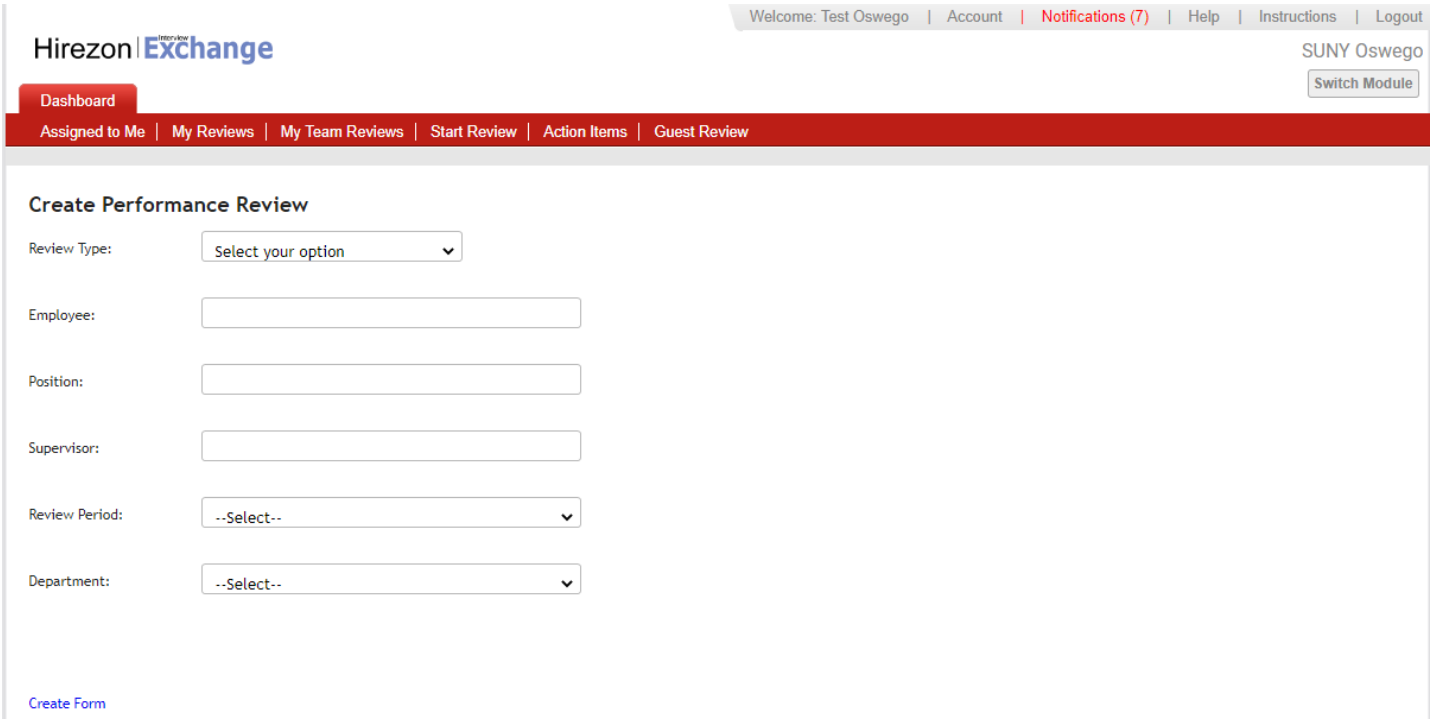


How to Start New CSEA Six-Month Recertification

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

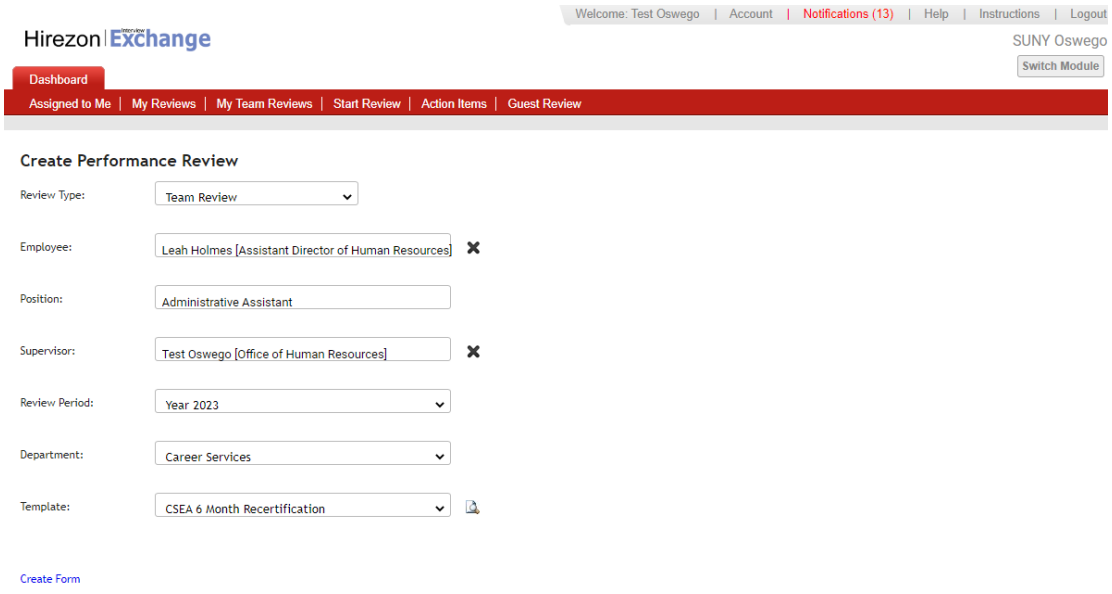


It will then take you to the following screen:



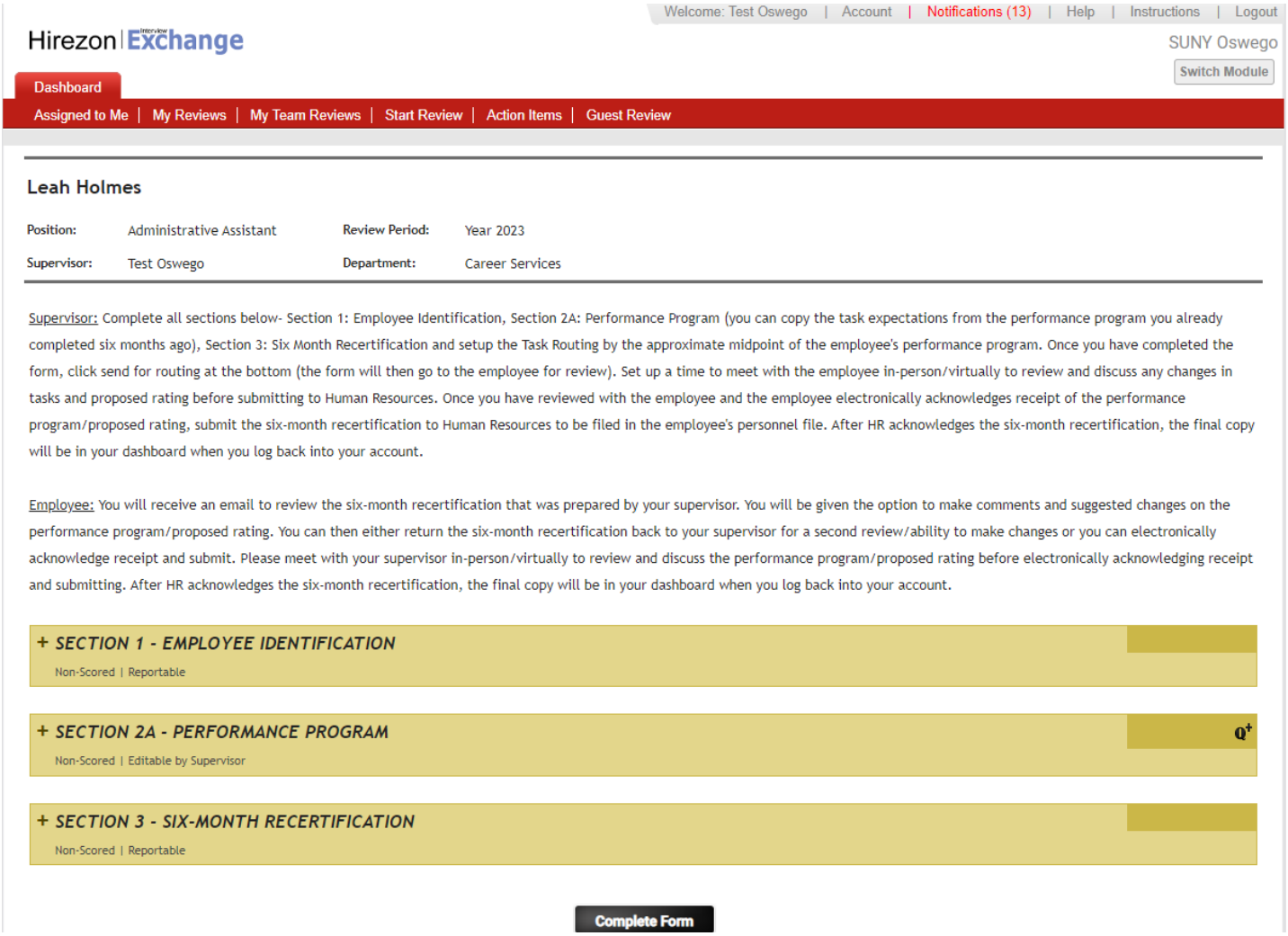
2.) Fill in all the requested information and click Create Form:

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: Select the direct report's department from the drop down.
Template: You will see all active templates- choose *CSEA 6 Month Recertification*.

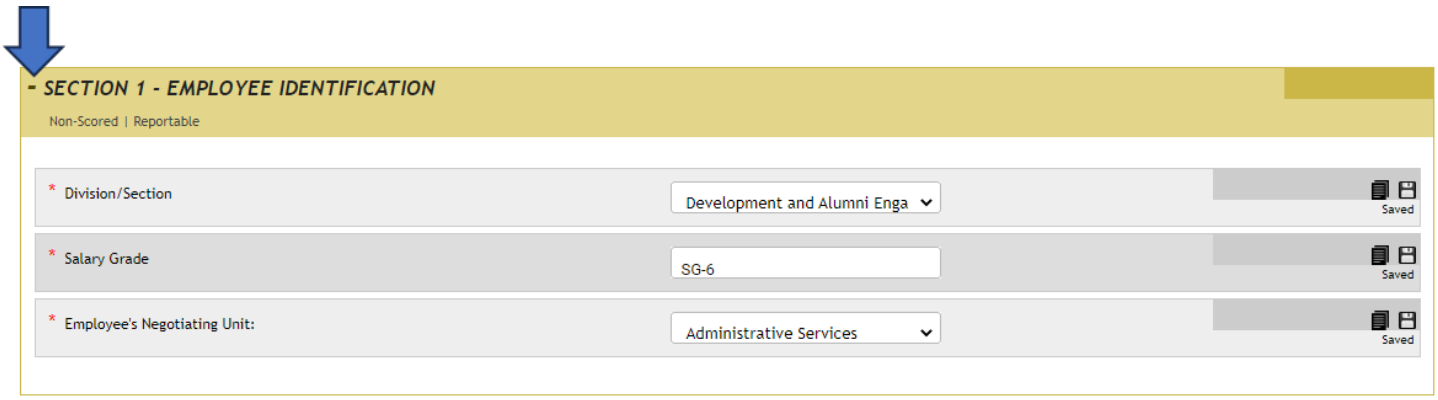


3.) The next screen will be the CSEA Six-Month Recertification form for you to complete.

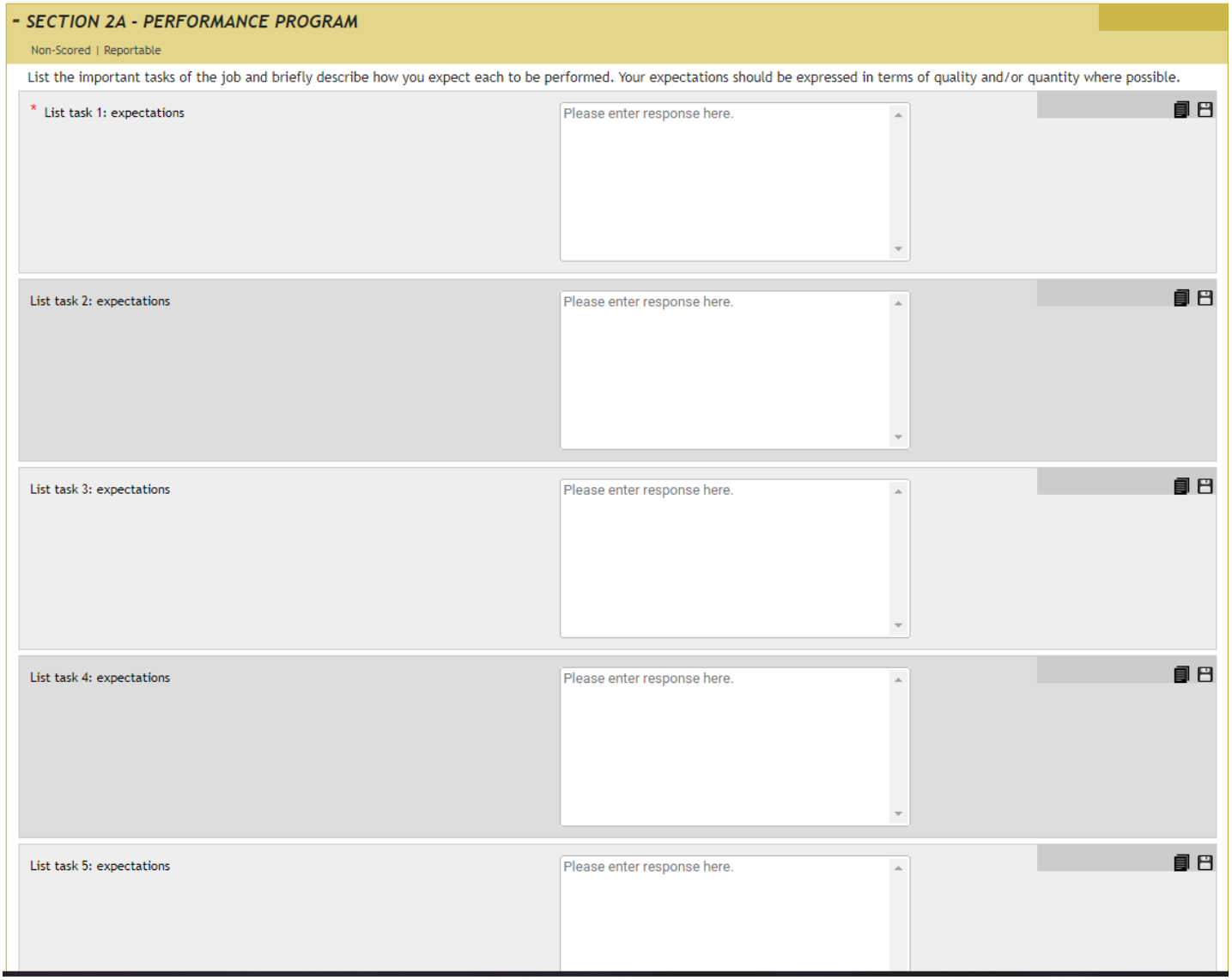
**There are instructions at the top for your review.*



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



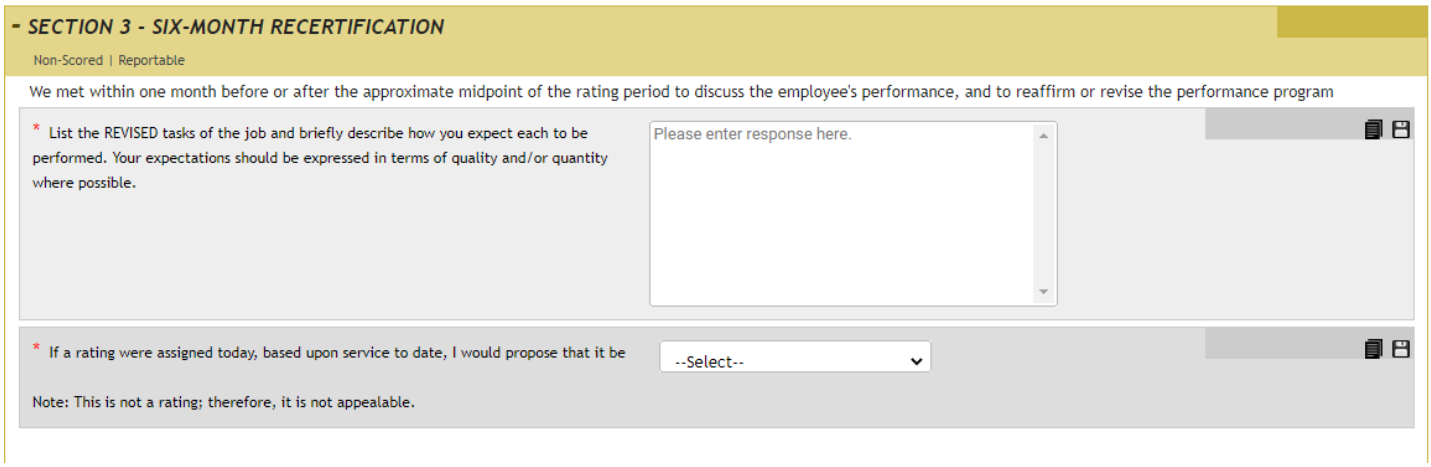
5.) Next, click on the + next to Section 2A- Performance Program and the form will drop down, complete the information required:



**The form is 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. Each year, you can copy the 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.*

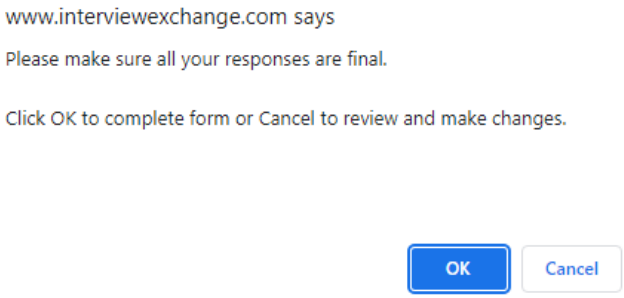
6.) Last, click on the + next to Section 3- Six-Month Recertification and the form will drop down, complete the required information:



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

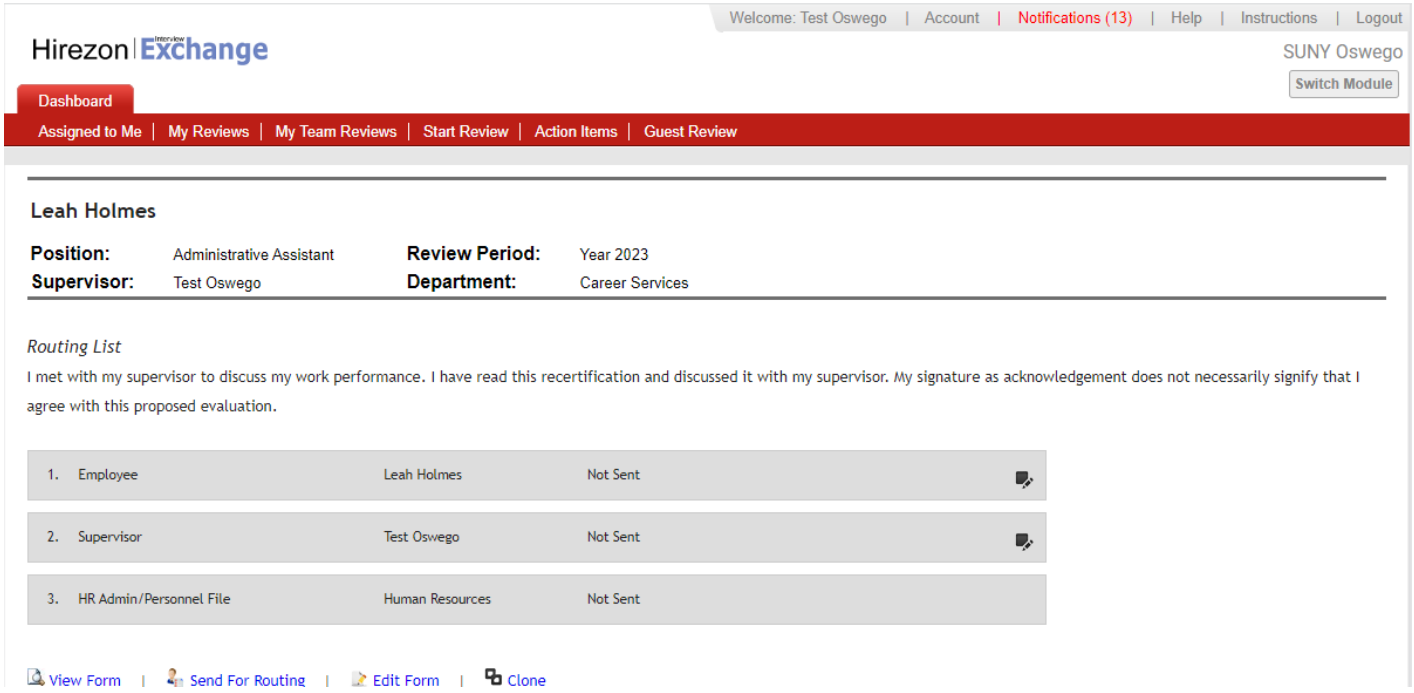
7.) Once you have finished entering all the information, click the Complete Form box at the bottom:

You will get this notification box:



When all your responses are final, click OK.

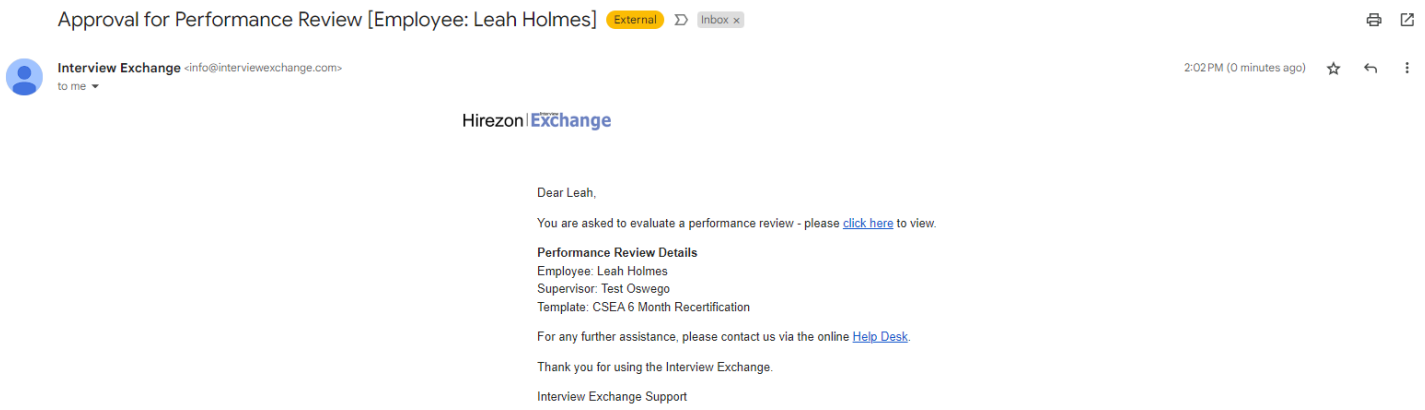
8.) After you click OK, the next screen will be the routing list (who needs to see/acknowledge) this 6 Month Recertification:



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.

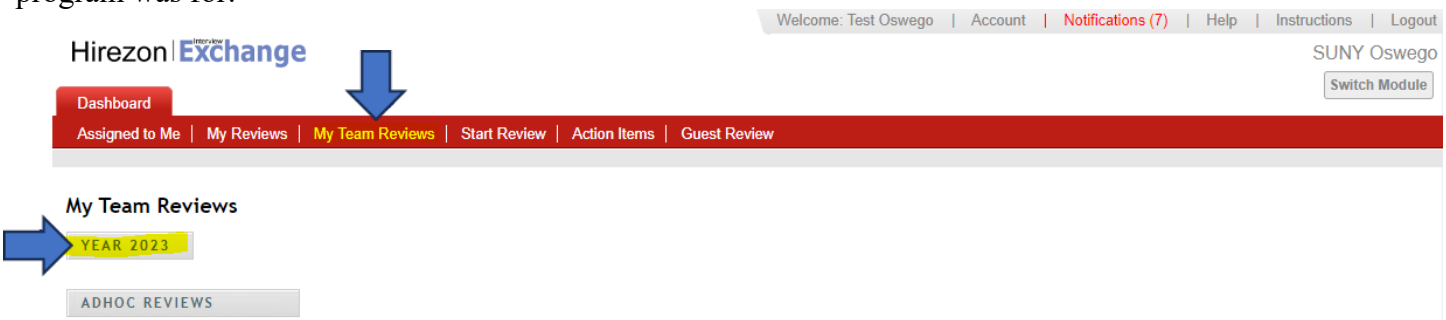
Once you have the routing list completed, click Send for Routing at the bottom.

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

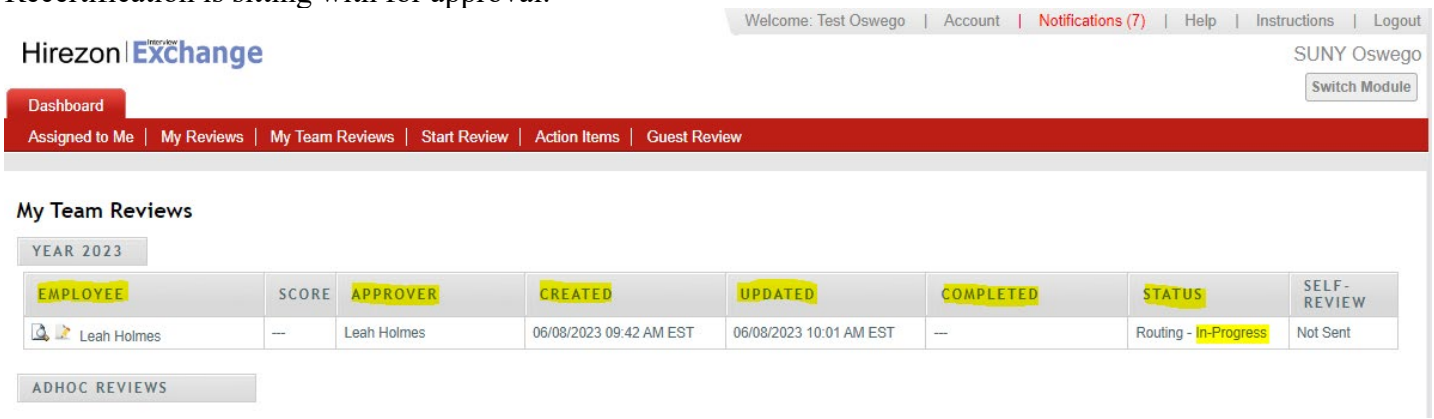


How to Find Direct Report CSEA Six-Month Recertification in Process

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



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

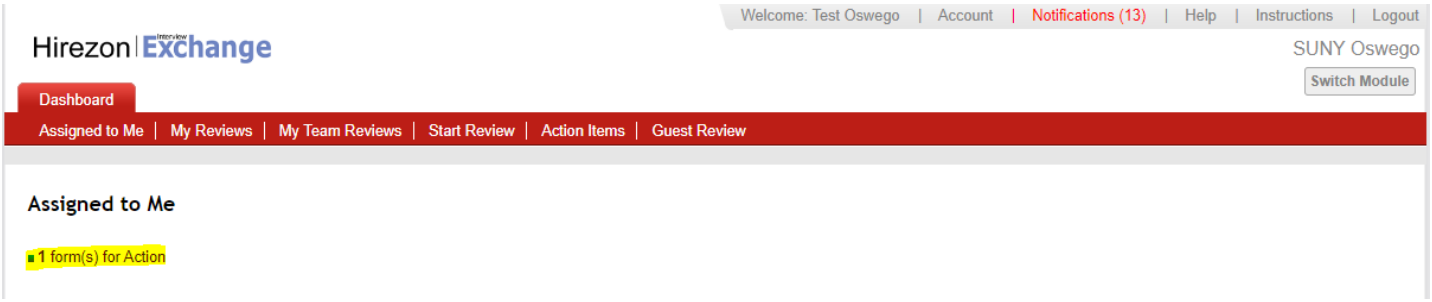


a.) You can click on the paper with magnifying glass next to the employee's name to view the 6 Month Recertification. *You can download into a PDF or print if needed- if you'd like to bring a physical copy to the meeting with your employee. If you do this, please remember this is NOT the final copy. The Six-Month Recertification is not final until the employee, you and HR have approved/acknowledged it in the system.

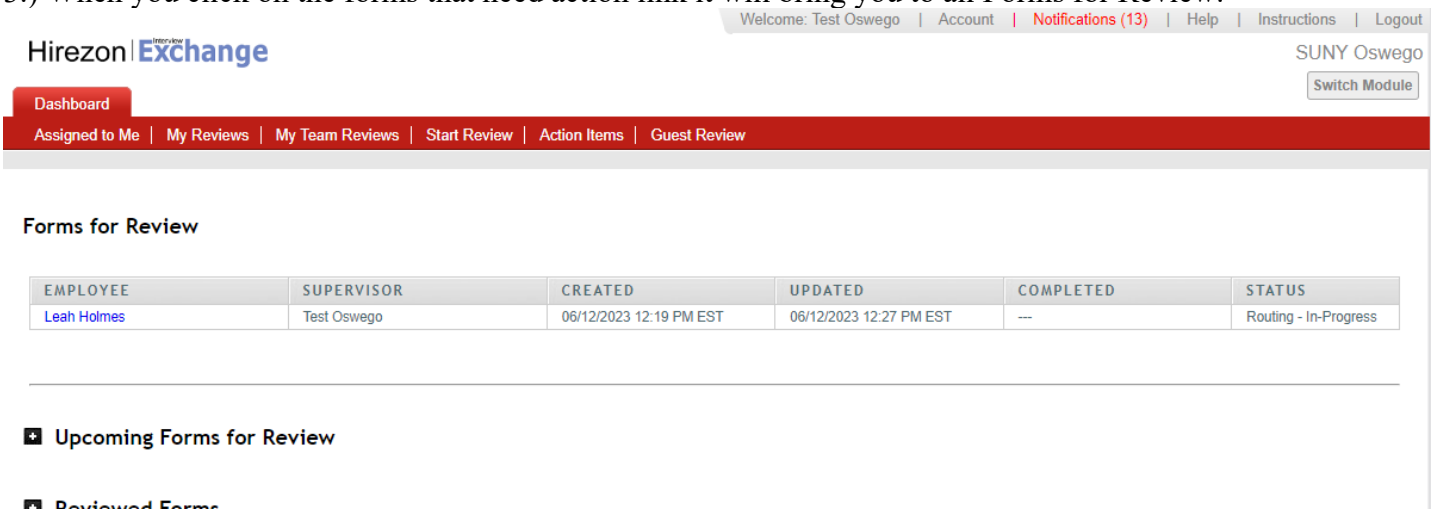
How to Review/Acknowledge Direct Report CSEA Six-Month Recertification

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

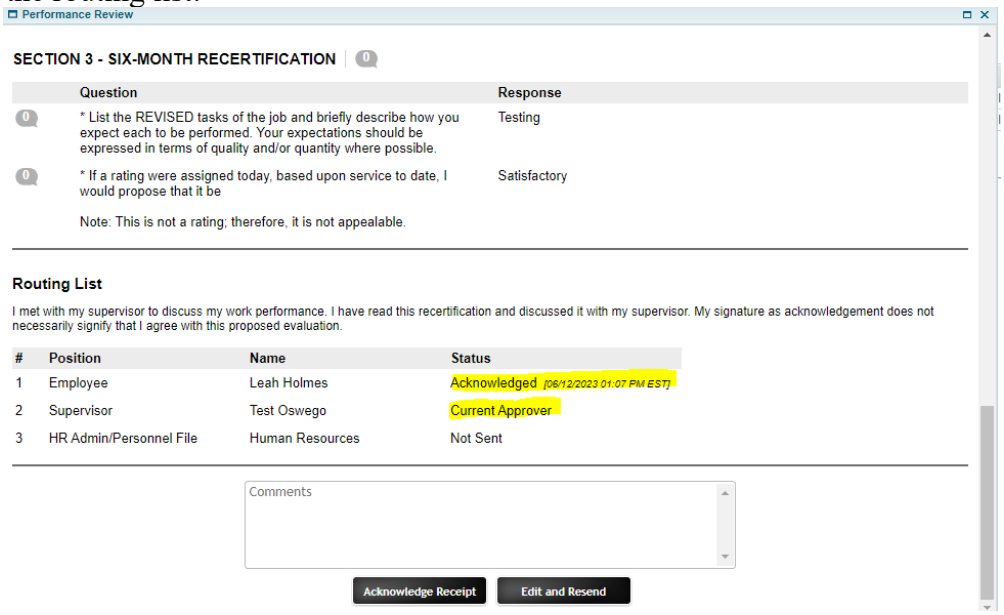
2.) Once you log in to your Hirezon/Interview Exchange account, this will be the first screen you see- Assigned to Me and items that need your action:



3.) When you click on the forms that need 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 CSEA Six-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 0 - 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:



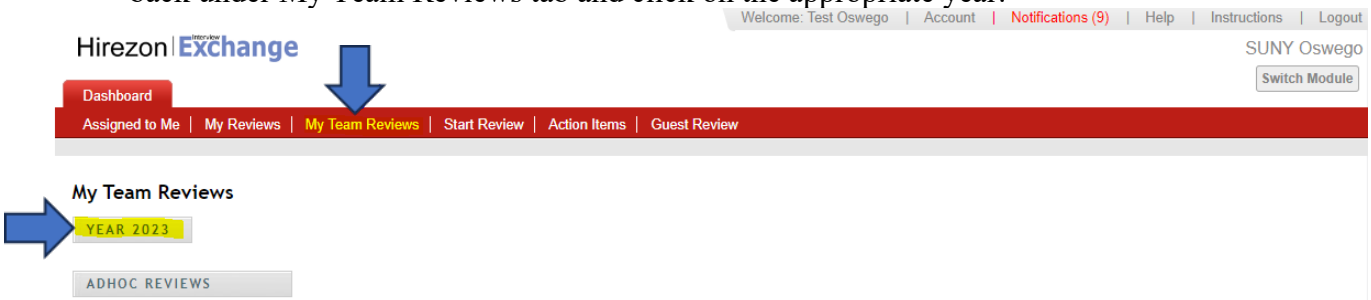
5.) You will see the employee either acknowledged the Six-Month Recertification or sent back to you for

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

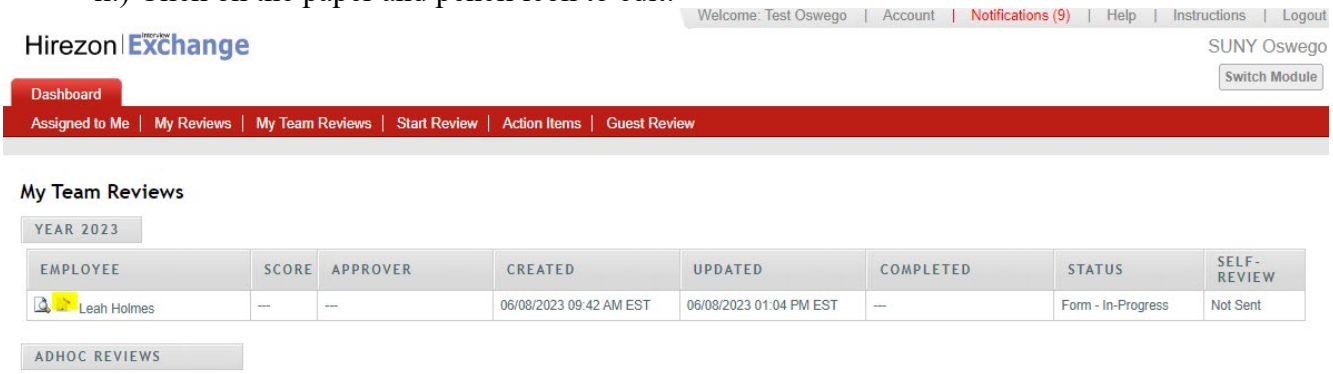
a.) **Acknowledge Receipt-** which means you are finalizing the Six-Month Recertification, and it will be sent to the HR Office to be filed in the employee's personnel file.

b.) **Edit and Resend-** you can make last minute changes if needed and send it 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:



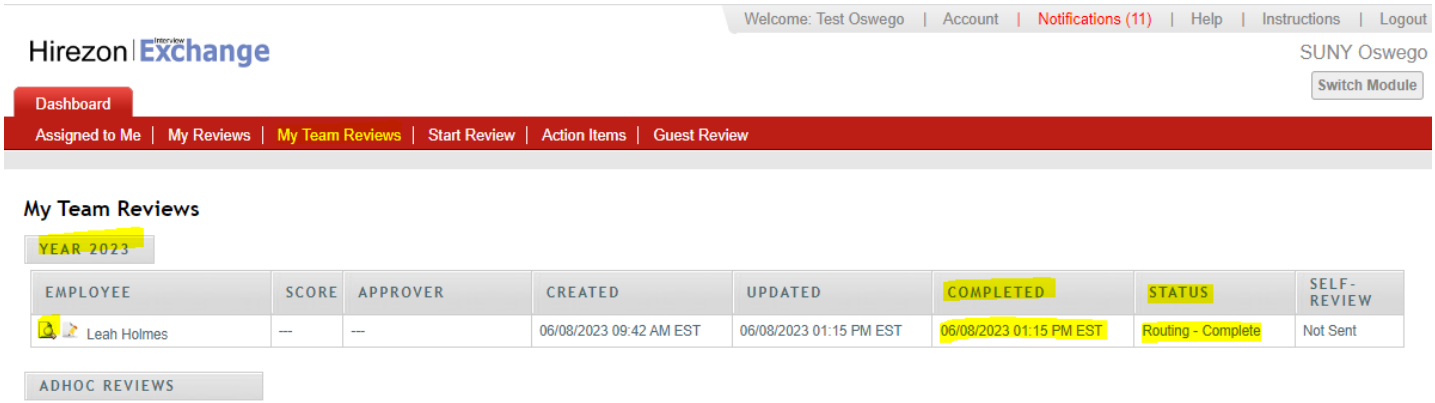
iii.) Make the necessary changes, scroll to the bottom- click Complete Form, then on the next screen verify the routing list again and click Send for Routing at the bottom. This will be sent back to the employee for their review/acknowledgment.

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

How to Find Completed Direct Report CSEA Six-Month Recertification

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

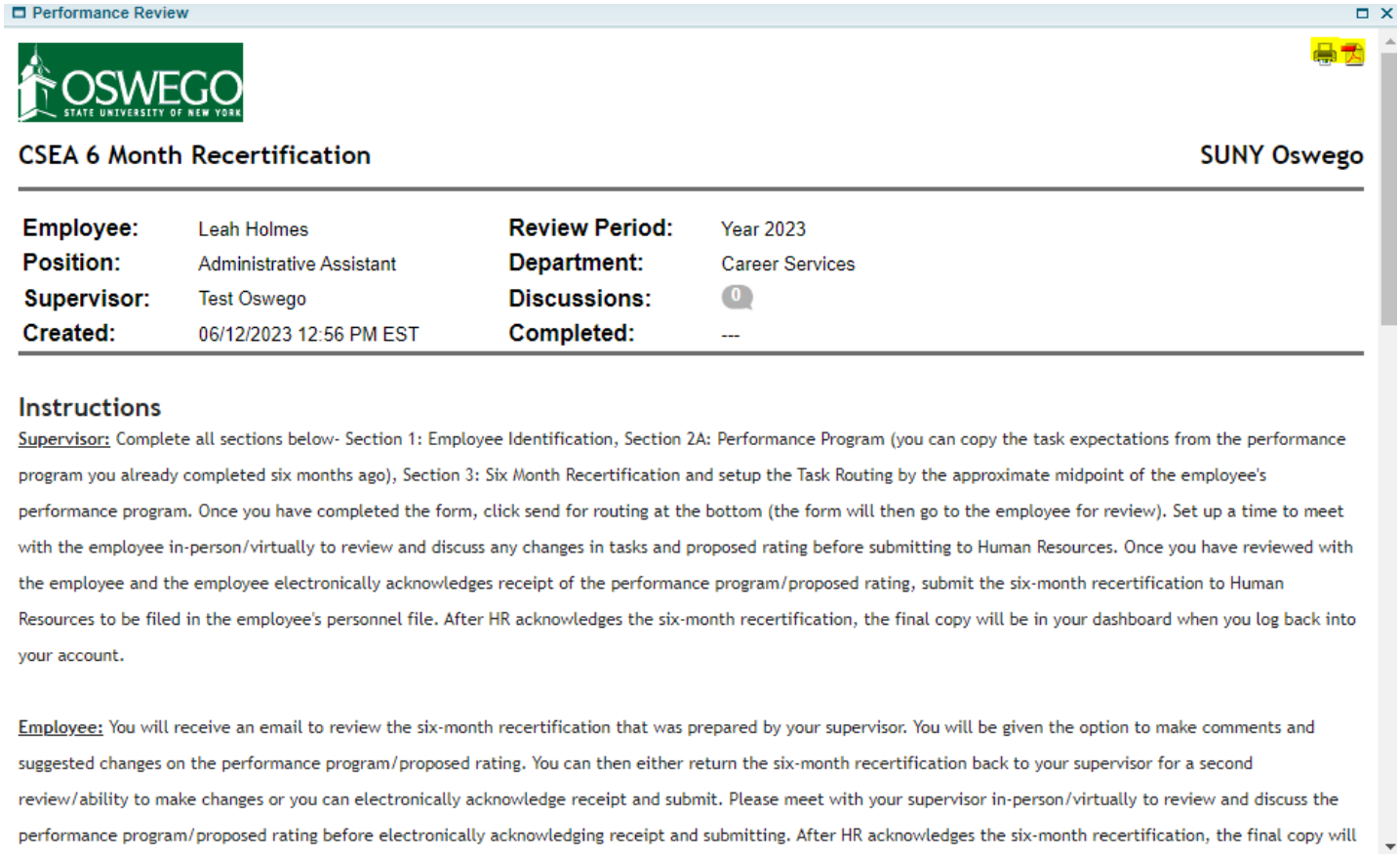
2.) You can log in to your Hirezon/Interview Exchange account and find the final Six-Month Recertification under the My Team Reviews tab, and click on the appropriate year:



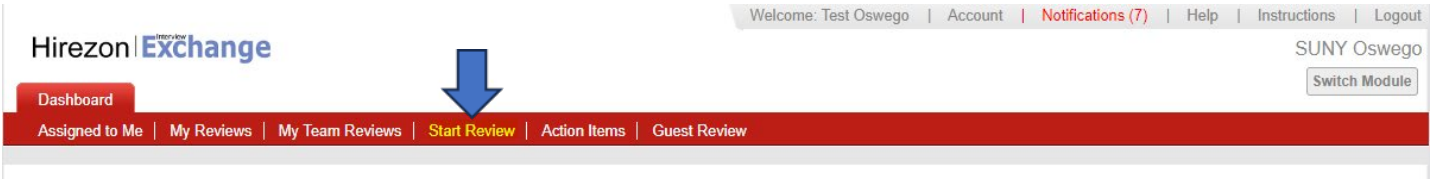
a.) You will now see there is a completed date and time filled in and the status reads, Routing-Complete.

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

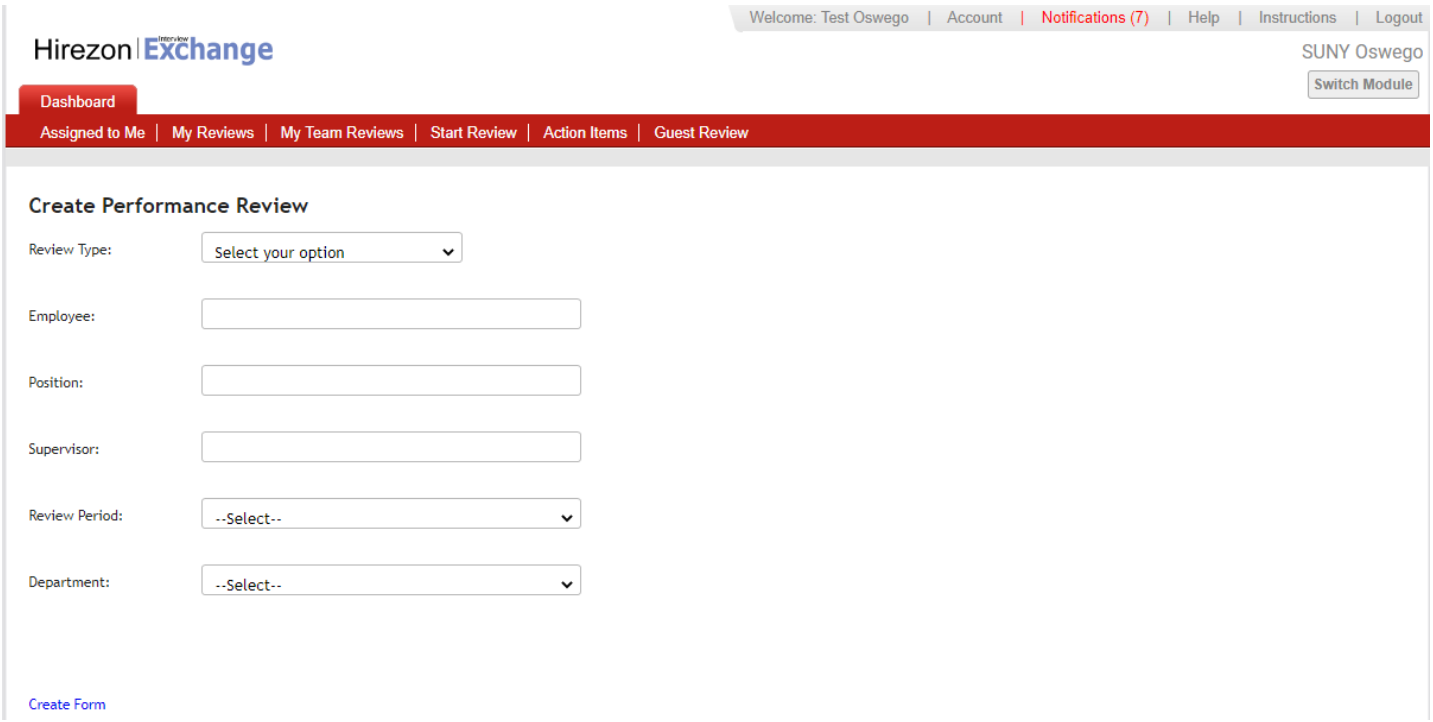
c.) Then you can download the final version into a PDF to save or print. At this point, you should download a copy of the Six-Month Recertification and send it to your (evaluator's) supervisor.



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

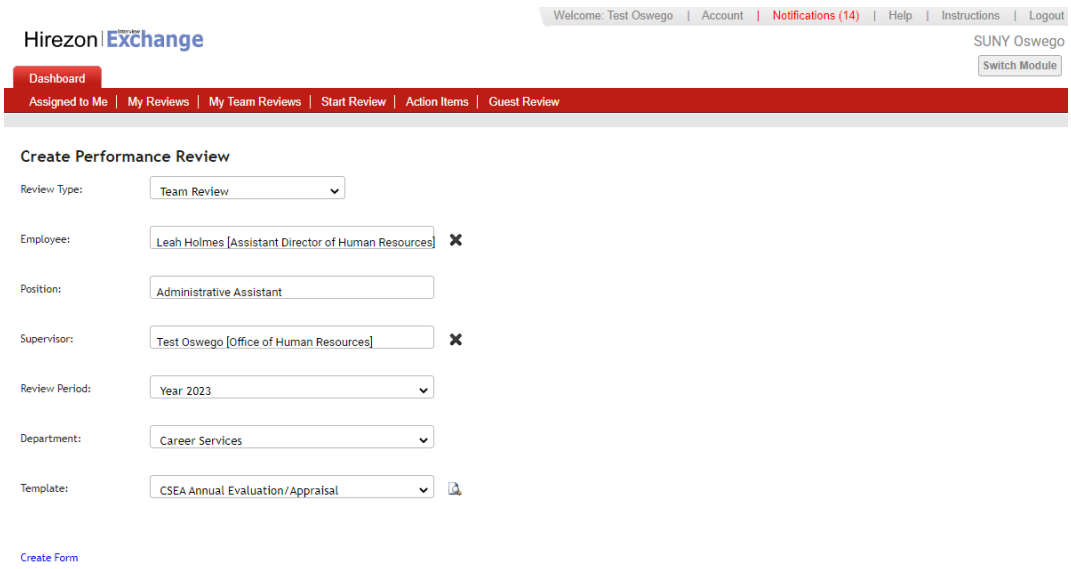


It will then bring you to the following screen:



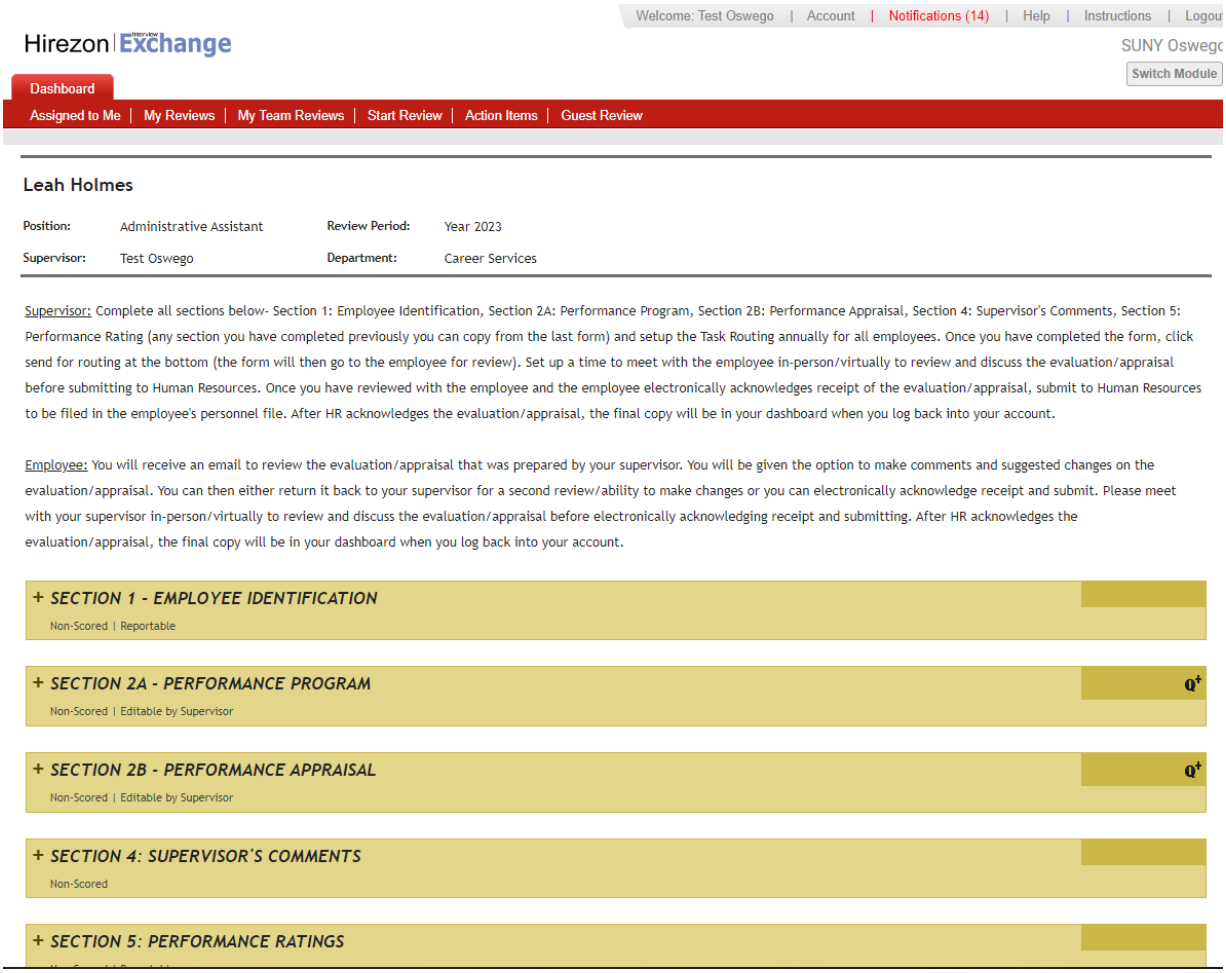
2.) Fill in all the requested information and click Create Form:

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: Select the direct report's department from the drop down.
Template: You will see all active templates- choose *CSEA Annual Evaluation/Appraisal*.

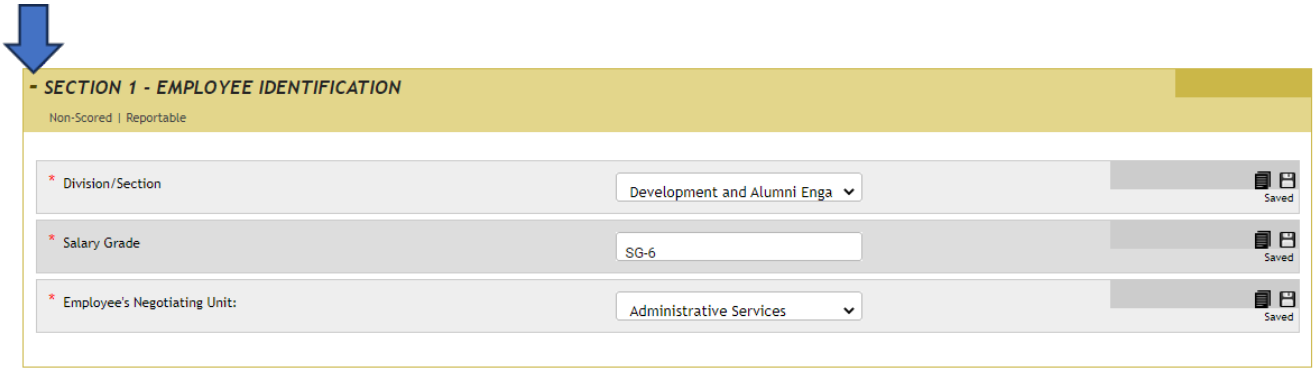


3.) The next screen will be the CSEA Annual Evaluation/Appraisal form for you to complete.

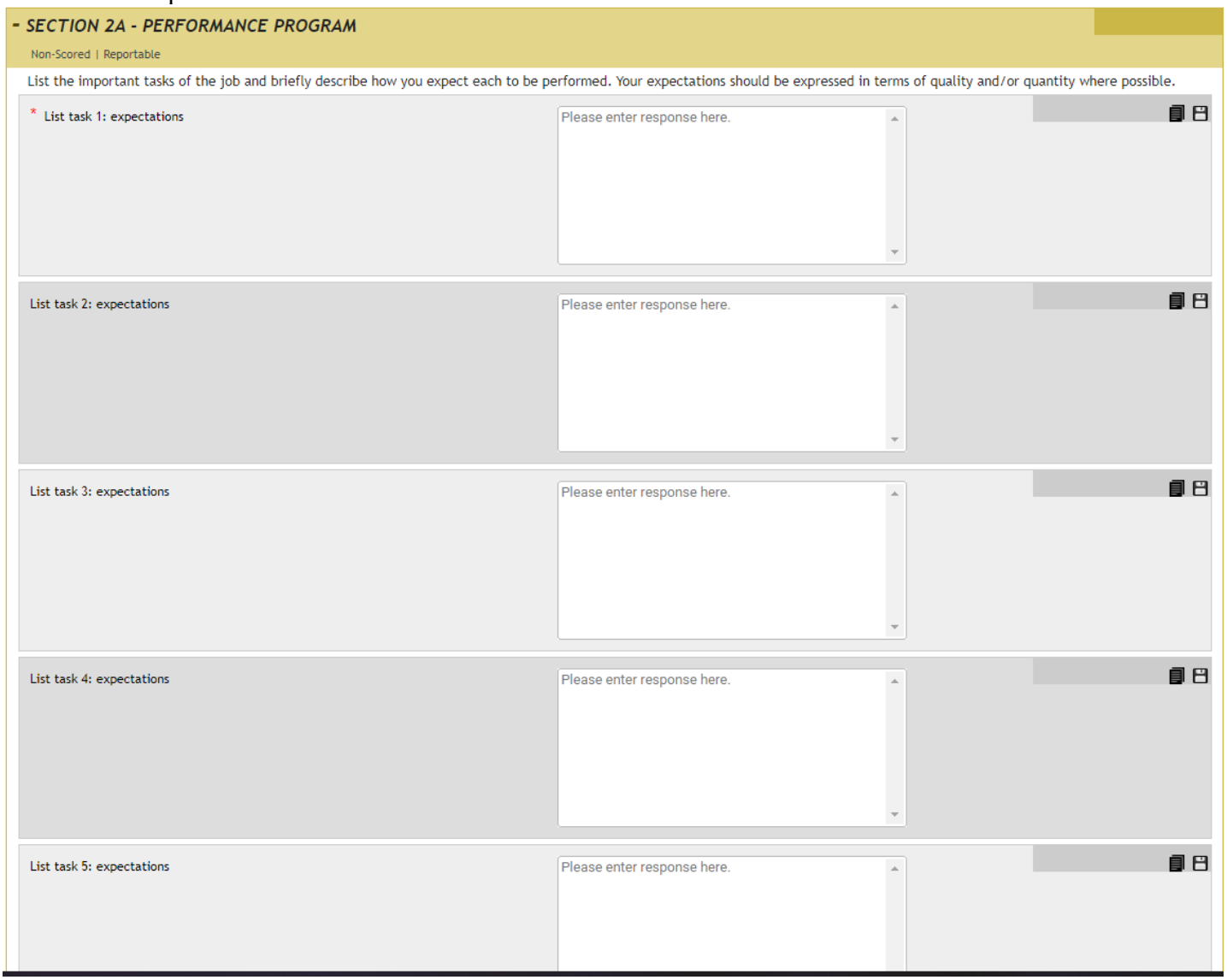
**There are instructions at the top for your review.*



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

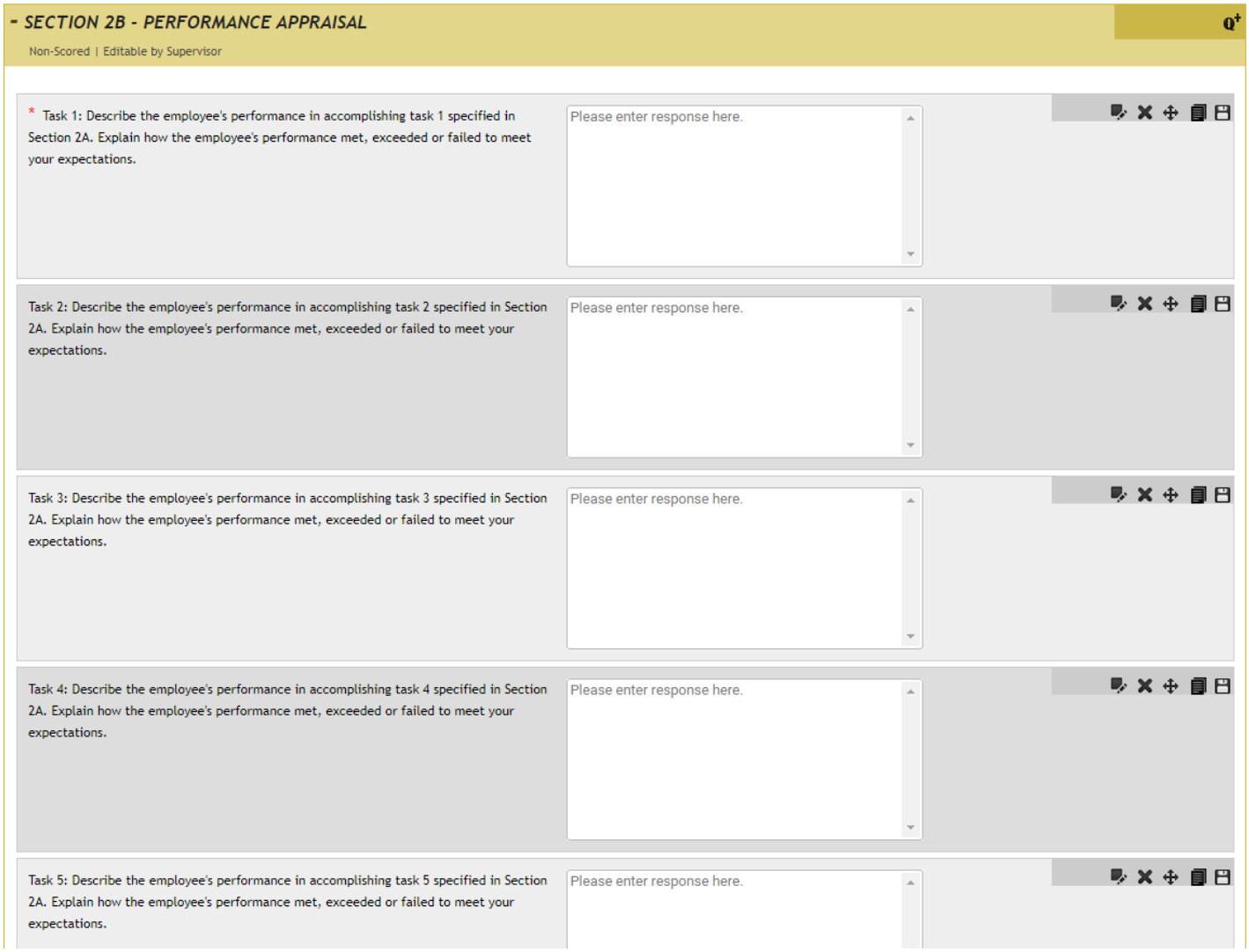


5.) Next, click on the + next to Section 2A- Performance Program and the form will drop down, complete the information required:

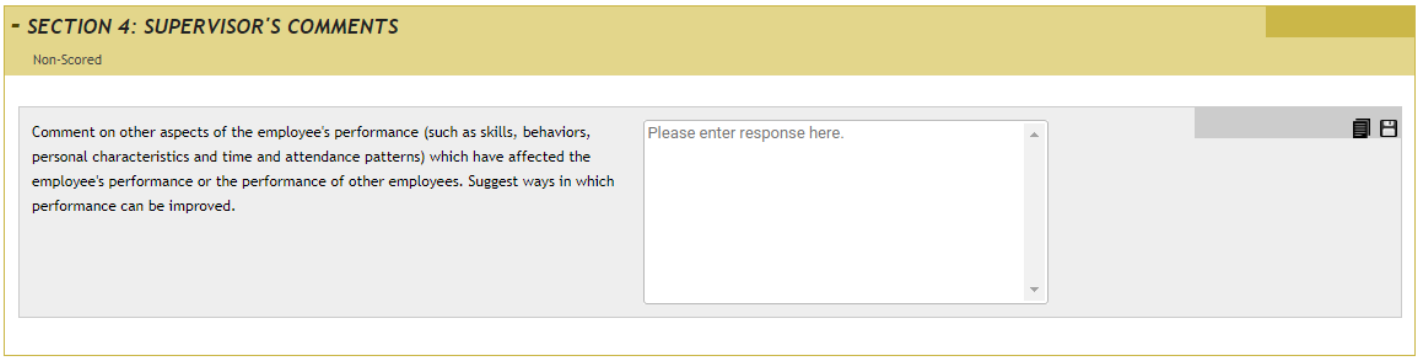


6.) Next, click on the + next to Section 2B- Performance Appraisal and the form will drop down, complete the

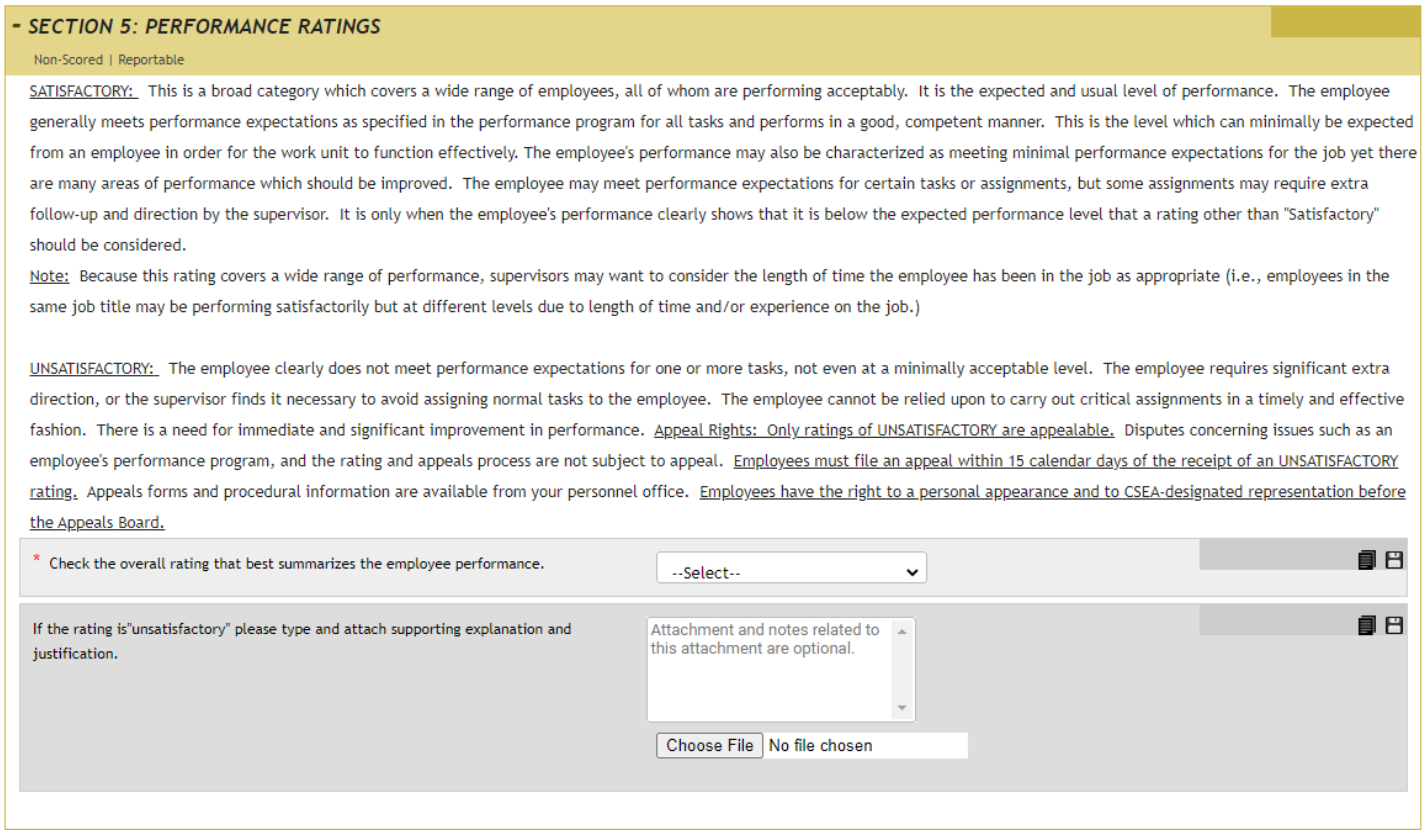
information required:



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



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

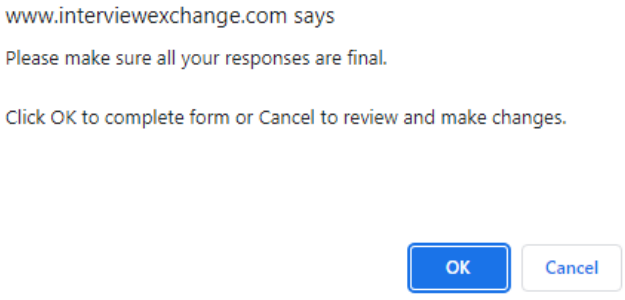


**The form is the same as the paper version you are used to working with. There are no language changes.*

**Note: As you use this system year after year, content will be saved. Each year, you can copy the 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.*

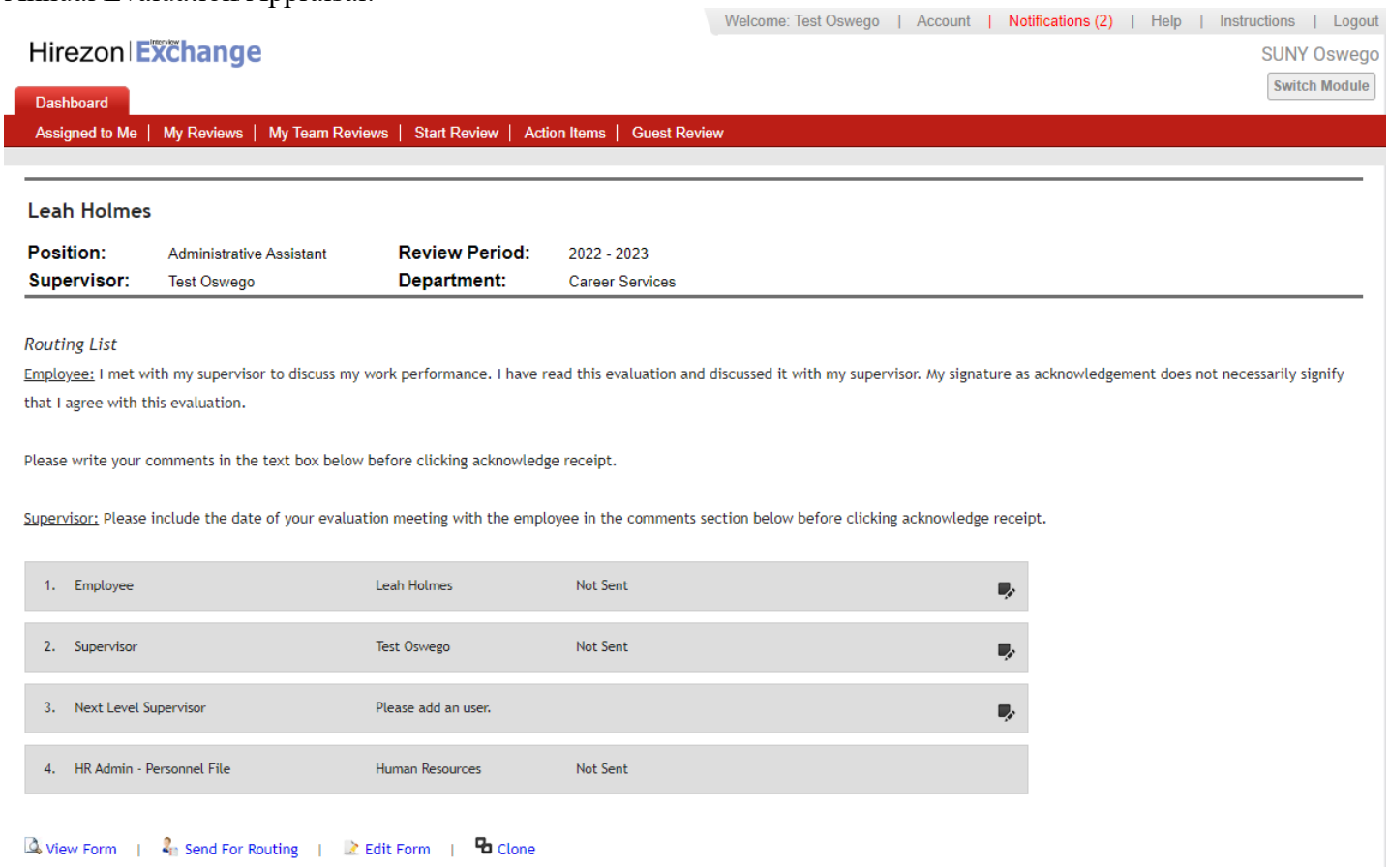
9.) Once you have finished entering all the information, click the Complete Form box at the bottom:

You will get this notification box:



When all your responses are final, 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 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 ×

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

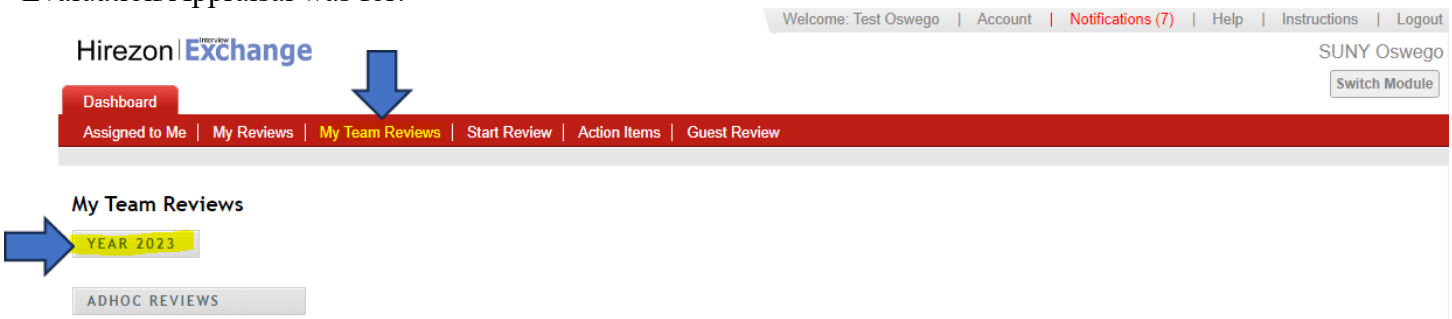
For any further assistance, please contact us via the online Help Desk.

Thank you for using the Interview Exchange.

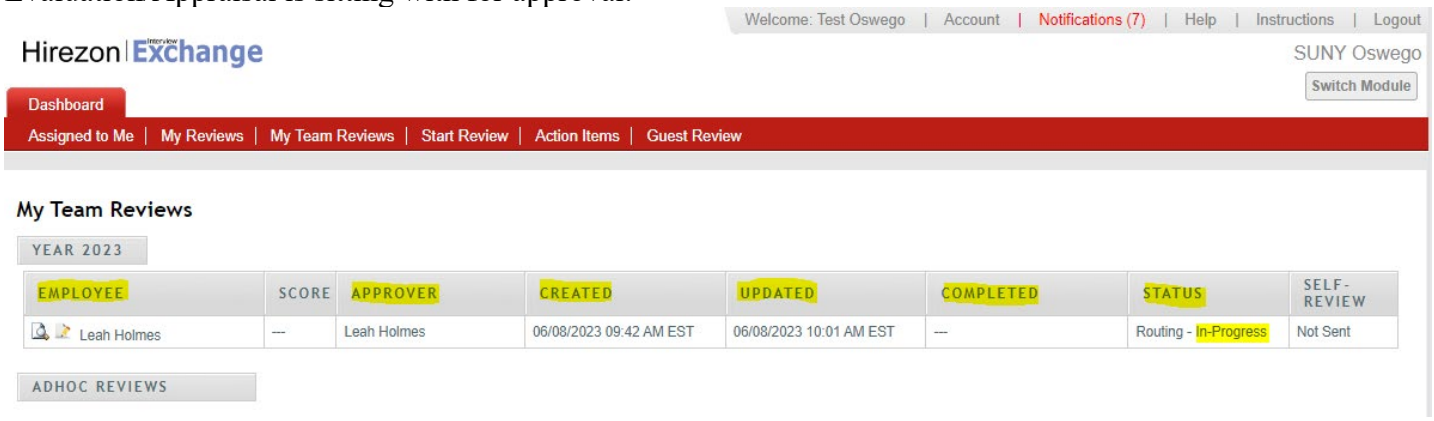
Interview Exchange Support

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:



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:



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, your supervisor 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.

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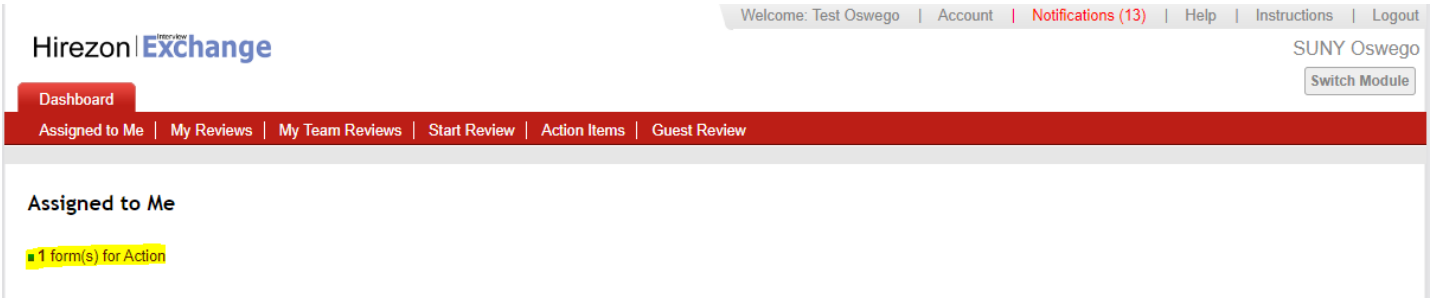

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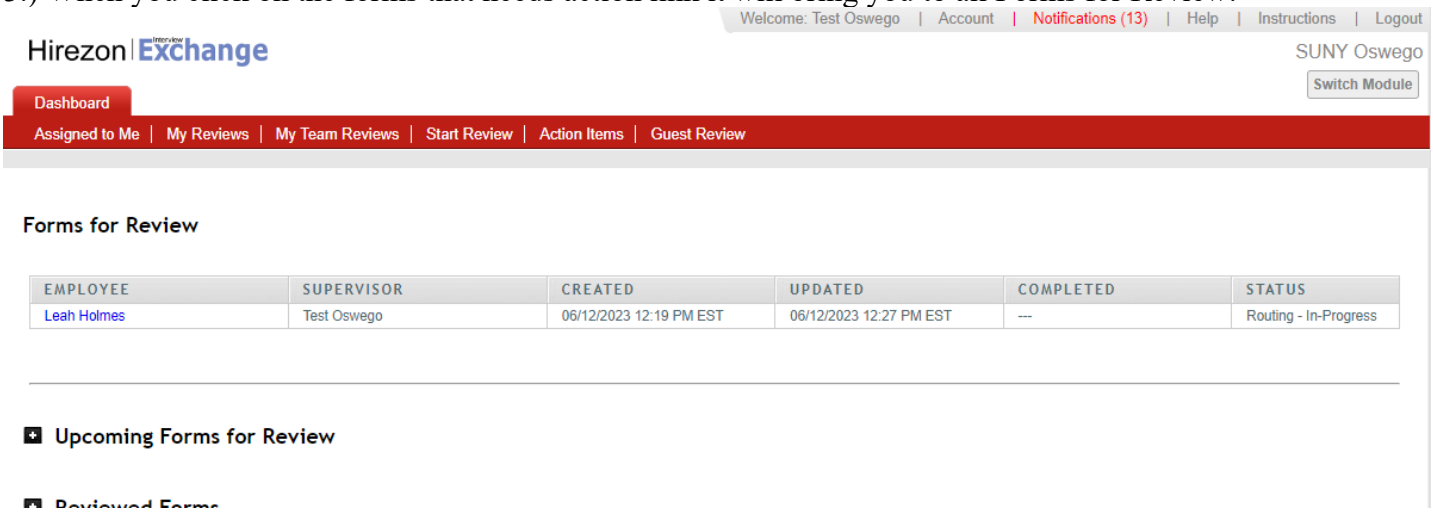

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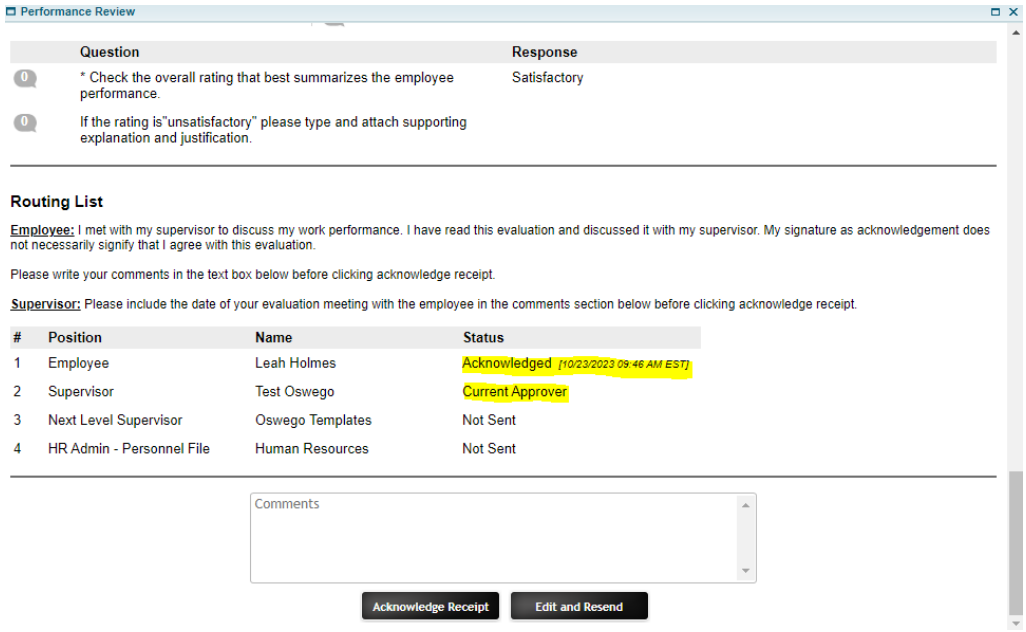

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a.) **Acknowledge Receipt-** which means you are finalizing the CSEA Annual Evaluation/Appraisal, and it will be sent to the HR Office to be filed in the employee's personnel file.

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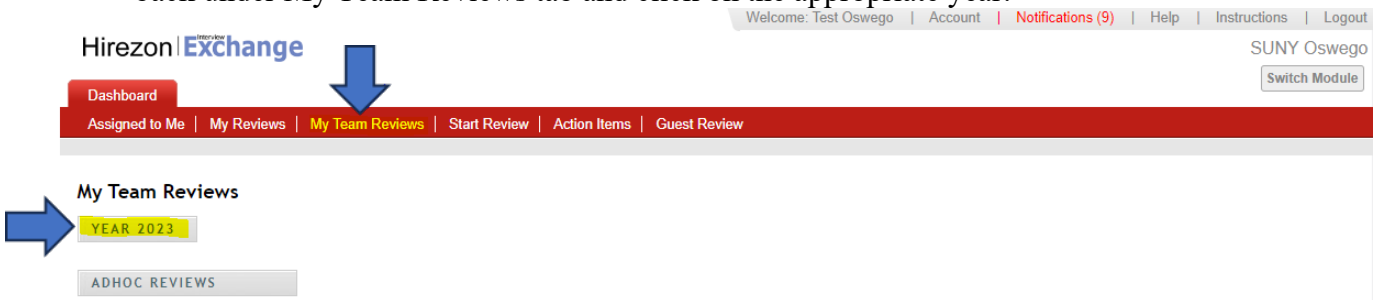

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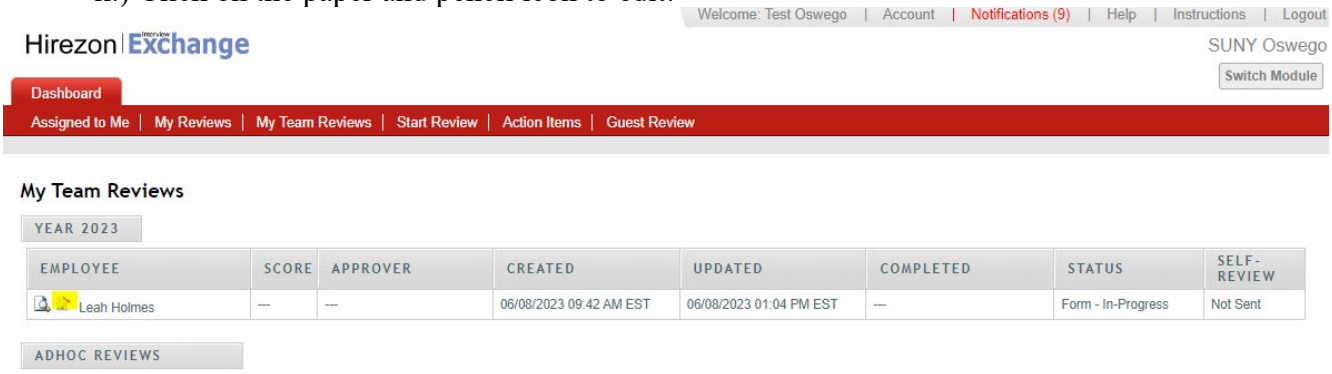

iii.) Make the necessary changes, scroll to the bottom- click Complete Form, then on the next screen verify the routing list again and click Send for Routing at the bottom. This will be sent back to the employee for their review/acknowledgment.

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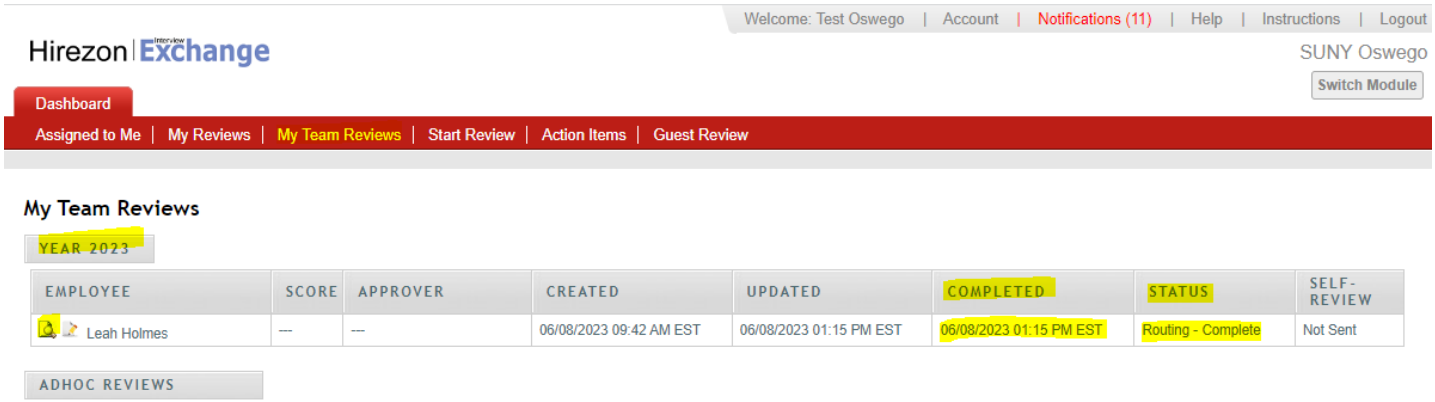

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c.) Then you can download the final version into a PDF to save or print. **At that time, you should download a copy of the Annual Evaluation/Appraisal and send it to your (evaluator's) supervisor.**

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.