

Roger Williams University Department of Human Resources

The Online Performance Review Module at Roger Williams University & School of Law

Instructions for Supervisors





Performance Review Module Instructions for Supervisors

When the Performance Review process begins for the year, please follow these instructions for each of your direct reports that have been in their position for at least one year.

For employees in their position less than one year, please establish Developmental Goals in the Supervisor Review section. They will still receive the voluntary Self-Evaluation.

- **1.** Log into the system using your RWU Single Sign on at:
 - https://www.interviewexchange.com/login.jsp

On the Hirezon/Interview Exchange login page, enter your email address and then TAB into the password line.

This step will re-direct you to the RWU single sign in page.

12 14 23		
Login		
Email:		
YOUR EN	IAIL HERE, then press TAB	
Password:		
Password:		
Password:	Login	

Hirezon Exchange

Use the same login as Office365

(not necessarily your network password)



You will get a Duo Push for 2-step verification



2. <u>Click on the Performance Review Module</u>



3. The Performance Review Dashboard

Once you have logged in, you are able to see all reviews you have completed in the system, including past reviews and those you are working on. You will also see your personal reviews.

- In the system, <u>always use</u> the **Year 202X** option.
- Do not select <u>Annual</u> or <u>AdHoc Reviews</u>.

To see Reviews you have created, select "My Team Reviews" and the year.

Hirezon	xchange
Dashboard	Performance Review Admin
Assigned to Me	My Reviews My Team Reviews
My Team Rev YEAR 2023	views <last b="" year's<=""></last>
YEAR 2024	<new< th=""></new<>

If you or your Employee's job titles are incorrect.

Stop creating the form and correct the job title(s) first, using the 5 simple steps

to changing your job title in Interview Exchange. Both titles should be corrected before you "Create Form".





- 4. Creating a New Review
 - Click on "Start Review"



Here are the Form Categories

- Employee This field sorts by name and will show a list of all employees.
 Please be sure you select the correct employee from the list.
 If you do not see your employee please contact HR to have them added.
- **Position Same as the Directory.** Copy & Paste from the Employee line.
- **Supervisor** This will usually be you.
- Review Period Always use the current "Year 2024".
- **Department** A drop down list will appear.
- **Template** Only appears after you fill in the Department. (There is only one option)

Here is what a complete Form looks like.

Create Performance Review								
Employee:	Jared Smith [Compensation and Benefits Associate]	×						
Position:	Compensation and Benefits Associate							
Supervisor:	Joyce A Maynard [Mgr. Comp & Benefits]	×						
Review Period:	Year 2023 🗸							
Department:	Human Resources							
Template:	PERFORMANCE PLANNING and EVALUATION	4						
Create Form								

You can now click on "Create Form" to start the process.

5. Send for Self-Review/Evaluation

🕹 Send For Self Review

page and click

As soon as you create the form, immediately scroll to the bottom of the

+ Self Evaluation - Results of Previously Established Goals Non-Scored | Reportable | Valble for Self Review
+ Self Evaluation - Performance Non-Scored | Reportable | Valble for Self Review
+ Self Evaluation - Performance Non-Scored | Reportable | Valble for Self Review
+ Self Evaluation - Future Goals & Objectives Non-Scored | Reportable | Valble for Self Review
+ Supervisor Review - Employee ID Non-Scored | Reportable
+ Supervisor Review - Performance Summary Non-Scored | Reportable
+ Supervisor Review - Performance Summary Non-Scored | Reportable
+ Supervisor Review - Performance Summary Non-Scored | Reportable
+ Supervisor Review - Performance/Developmental Goals | (if applicable) Non-Scored | Reportable
+ Supervisor Review - Overall Rating Non-Scored | Reportable
- Supervisor Review - Overall Rating Non-Scored | Reportable
- Supervisor Review - Overall Rating Non-Scored | Reportable
- Add New SecterCICCK CHERERE Non-Scored | Reportable
- Add New SecterCICCK HERERE Non-Scored | Reportable
- Add New SecterCICCK HERERE
- A

Here is a visual aide to show you where to click.

REPEAT THAT FOR ALL OF YOUR EMPLOYEES

1.		2.		3.
Hirezon Exchange	Create Perform	ance Review		CLICK HERE!
Dashboard Performance Review Admin	Employee:	Jared Smith [Compensation and Benefits Associate]	×	
Assigned to Me My Reviews My Team Reviews All Reviews Start Review	Position	Compensation and Benefits Associate		🚨 🕹 Send For Self Review
	Supervisor:	Joyce A Maynard [Mgr. Comp & Benefits]	×	
	Review Period:	Year 2023 👻		
	Department:	Human Resources		
	Template:	PERFORMANCE PLANNING and EVALUATION	а	
	Create Form			

- The Self-Evaluation is voluntary for employees, but they do need to at least Complete the form. <u>The review cannot be submitted for routing if</u> <u>the Self-Evaluation is not submitted, even blank.</u>
- **Do NOT create two reviews for the same person.** All you're doing is creating more work for yourself because you will have to transfer everything you did on the second review to the version that has the Self-Evaluation. Check your Dashboard to make sure nobody is there twice in the same year.

6.

6. <u>Reviewing and Responding to the Self-Evaluation</u>

- When the Employee submits the Self-Evaluation, even if they left it blank, you will receive an email from the system.
- In the Dashboard banner select "My Team Reviews"
- Click on the Edit Icon next to the Employee's name

Hirezon Exchan	ige		We	Icone: RWJ Hiring Menager	Account Notil	ications(3) Hulp Ins RogerV	tractions Logout Villiams University Switch Module
Dashboard Assigned to Me My Rovia	ws My Team	Reviews Start Rev	iow Active Itoms Guest Re	view			
My Team Reviews							
EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	REVIEW
RWU Employee	-		02/23/2023 03:04 PM EST	02/23/2023 02:36 PM EST	-	Form - In-Progress	Complete
ADHOC REVIEWS							

This will take you into the Self-Evaluation

Click on the "+" next to the words "Self-Evaluation" to expand each section and see the Employee's responses.

nt: Academic Program epare for a meaningful discus and career growth opportuni lease click COMPLETE Form be Established Goals esults achieved. If no goals wer	s, UC sion about your performance. Please ties by clicking on the + in each sect elow. Please enter response here.	e provide information about perfor ion to reveal the evaluation criter	rmance highlights over the ria.	past 12
epare for a meaningful discus and career growth opportuni lease click COMPLETE Form b Established Goals esults achieved. If no goals wer	sion about your performance. Please ties by clicking on the + in each sect elow.	e provide information about perfor ion to reveal the evaluation criter	rmance highlights over the ria.	past 12
Established Goals	e Please enter response here.	•	-	e
esults achieved. If no goals wer	 Please enter response here. 	Â		
		-		
ctives				
	; ctives	ctives	ctives	s ctives

Here is what the Self-Evaluation looks like

- The Employee comments are in the green box.
- If you feel the need to leave a response, enter it in the **purple** box.

RWU Emp	oloyee		
Position:	Position Title Here	Review Period:	Year 2023
Supervisors	RWU Hiring Manager	Department	Academic Programs, UC
This form is i months and i If you wish n	intended to help you and your identify current and/or future ot to participate self evaluation	supervisor prepare fo development and car on this year, please cli	or a meaningful discussion about your performance. Please provide information about performance highlights over the past 12 reer growth opportunities by clicking on the + in each section to reveal the evaluation criteria. ick COMPLETE Form below.
- Self Ev Non-Score	valuation - Results of d Reportable Visible for Self Re	Previously Estat	blished Goals
List goals set, desc	established from your last evalu ribe contributions you made duri Employ	ation and the results as ing that time yee self-evalue	ation by the supervisor
RMU Emp	COMM	er cs.	Noyee response to self-evoluation goes here Copy employee comments icon

7. The Supervisor Review

- These are the 6 sections to be completed
- Click on the "+" sign to expand each section



Completing the Review

When the Self-Evaluation has been Submitted and you have completed the Supervisor review portion, with <u>no additional edits</u> to make, click on:

Complete Form

This should take you to the Routing Page. If you are not directed there, it may be because the Self-Evaluation hasn't been completed. Check your Dashboard. If you are stumped getting to the next screen, call HR.

 Please remember that all fields in the Supervisor review are "<u>required</u>" which means all fields need to have something in them for the form to complete.
 <u>For Example</u>, if you only have 2 goals but the system is set up for 5, you can just enter "N/A" in the other spaces for goals so the form will complete.

Your Dashboard at a Quick Glance - Where is the Review in the Process?

The **<u>Status</u>** field will show:

- Form You are editing the Review. Needs to be Completed and Routed.
- **Routing** The closed/completed Review is in route (Approver column).

The **<u>Self-Review</u>** field has 3 statuses, that tell you:

- Not Sent You didn't "Send for Self-Review".
- In-Progress The Employee is working on it.
- **Complete** Employee is done, Review can be completed.

EMPLOYEE	SUPERVISOR	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
🗟 这 Employee 1	Immediate Supervisor	-N/A	Shows who has the Form in the	06/08/2023	06/08/2023 11:55 AM EST	After HR	Form - In-Progress	In-Progress
🔍 🖄 Employee 2	Immediate Supervisor	-N/A	Approval Routing, or will be blank.	06/09/2023	06/09/2023 09:56 AM EST		Form - In-Progress	Not Sent
🗟 这 Employee 3	Immediate Supervisor		Jared Smith	05/15/2023	05/19/2023 11:38 AM EST	-	Routing - In-Progress	Complete

When the Review is completed, a date will appear in the Completed field. 9.

8. The Routing Window

Once you have clicked **Complete Form** the Template Routing screen will appear. If they require it, please add to the routing your Supervisor, or the next level up approver, in the box labeled **Next Level Supervisor** by clicking on the **Edit** icon **s** typing their name, select them, then click the **Save** button.

Routing List

By acknowledging this form, the supervisor and employee certify they have read and participated in this performance planning & evaluation process.
Employee: Once you have met with your supervisor, you will be able to add your comments below regarding your evaluation here.

1.	Next Level Supervisor	Type in NLS's nan	ne here, then >		8	
2.	Employee	Employee's Name	Not Sent	×	•	
3.	Human Resources	Jared Smith	Not Sent		×	

If the review is not going to the Next Level Supervisor,

click the **X** on that line to remove it.



1.	Employee	Employee's Name	Not Sent	×	•
2.	Human Resources	Jared Smith	Not Sent		×

• Once the routing is correct, click on



• This will send the completed form to the person on the first line of the routing, they will appear as **Current Approver**.



- If you still see "Not Sent" next to the first person's name, it did not send. There may be an issue with the form being incomplete, also check the Self-Evaluation to make sure it's completed.
 - If you get stuck, call HR.

Change After the In-Person Meeting

At this point, if you have made a decision to change one of the scorings based on the meeting, the Employee will need to send the form back to you by clicking on "Return to Supervisor" so you can make changes. Once you have made your changes, you will start the routing again by:

- Scroll to the bottom and click on
- In the Routing screen click on Send For Routing

Please do not change the Routing. This routing will overwrite the original routing, which means General Comments left the first time will be deleted. If someone had left a comment the first time, they will need to repeat that.

Complete Form

at the bottom of the page

9. Finalizing the Review

If the Employee requires no changes, or any changes have been made and the form is in routing, the Employee will click on **Acknowledge Receipt** which sends the form to HR for finalization.

The Review process is now complete!

DON'T STRUGGLE. IF YOU HAVE QUESTIONS PLEASE CALL HR.



Next Level Supervisors

- Work with your Supervisors through the review process and let them know how involved you intend to be in the process.
- You see the final review in the system before the Employee if you require that.
 - You will receive an email from the system.
- If you have edits, click "<u>Return to Supervisor</u>" to have the Supervisor make edits and changes.
- You click on "<u>Acknowledge Receipt</u>" to send the review to the Employee.
- In-Person Meeting happens.
- Employee clicks "<u>Acknowledge Receipt</u>" or:
 - If changes are made to the scoring, the Review opens and is sent back through the routing so everyone can approve the changes, starting with you and ending with the Employee clicking "<u>Acknowledge Receipt</u>"
 - If you made a General Comment the first time, it will need to be written again, as this routing will overwrite the first time.
- After the Employee clicks "<u>Acknowledge Receipt</u>" the completed review goes to HR for submission into the library.



Performance Rating Descriptions

O = <u>Outstanding Performance</u>. Reserved for individuals who regularly, consistently and substantially exceed overall expectations. These individuals work with little or no supervision and produce work that is exceptionally high in quality with an outstanding additional contribution that deserves special recognition.

E = <u>Exceeds Expectations</u>. Results achieved occasionally exceed performance expectations regarding this goal, project or behavior.
 Demonstrates high level of effectiveness and judgement. Contributes to the overall objectives of the department.

M = <u>Meets Expectations</u>. Results demonstrate effective performance. Performance is reflective of a fully qualified and experienced individual in this position. Viewed as someone who gets the job done and effectively prioritizes work.

N = <u>Not Meeting Expectations</u>. Regularly has difficulty meeting expected quality, quantity, customer service goals, behaviors and/or timeliness standards.