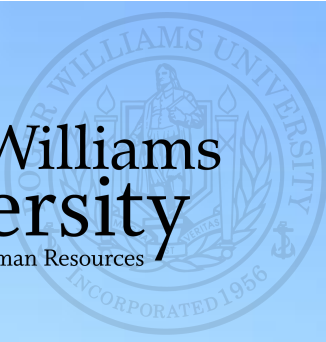


Roger Williams
University

Department of Human Resources



Updated for 2024!

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

Instructions for Supervisors



Performance Review Module Instructions for Supervisors

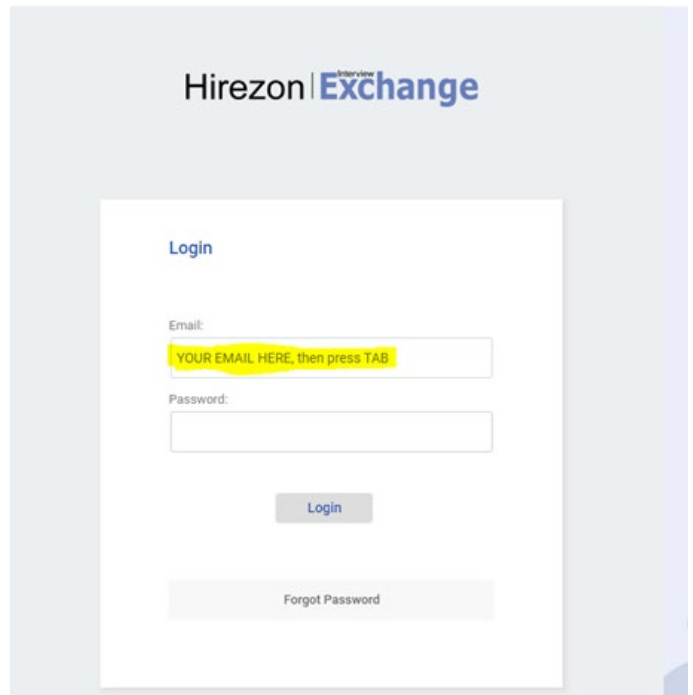
When the Performance Review process begins for the year, please follow these instructions for each of your direct reports that have been in their position for at least one year.

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.



Hirezon | Interview Exchange

Login

Email:
YOUR EMAIL HERE, then press TAB

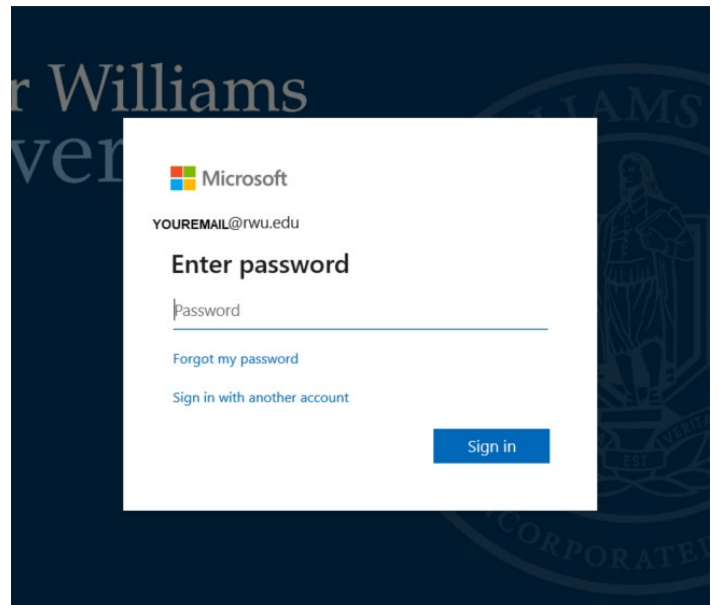
Password:

Login

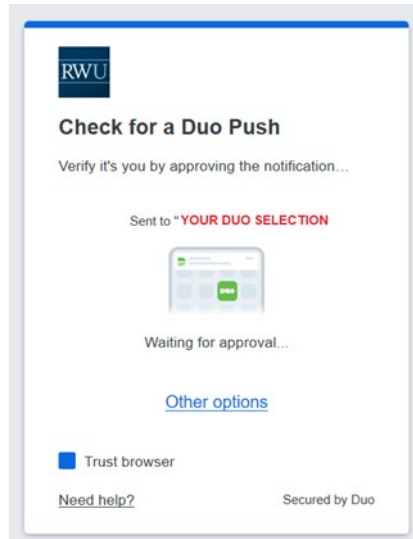
Forgot Password

Use the same login as Office365

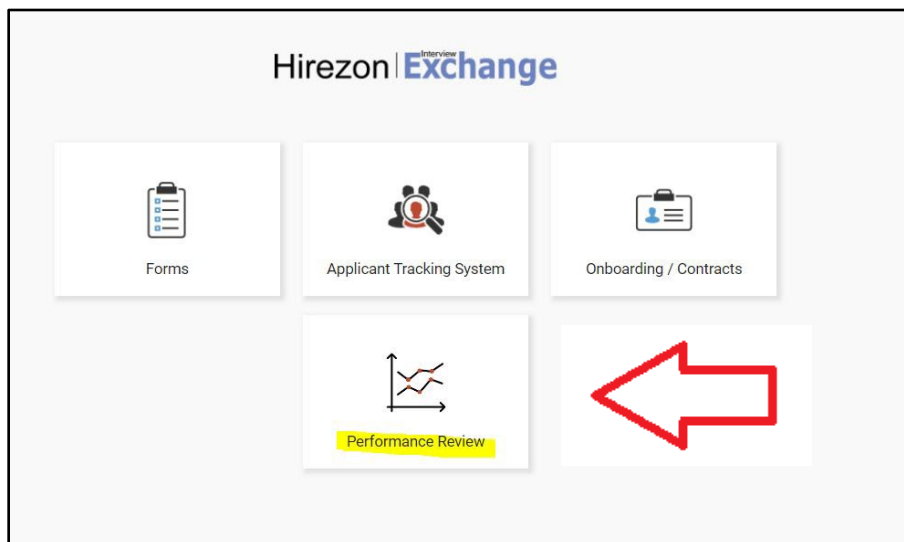
(not necessarily your network password)



You will get a Duo Push for 2-step verification



2. Click on the Performance Review Module

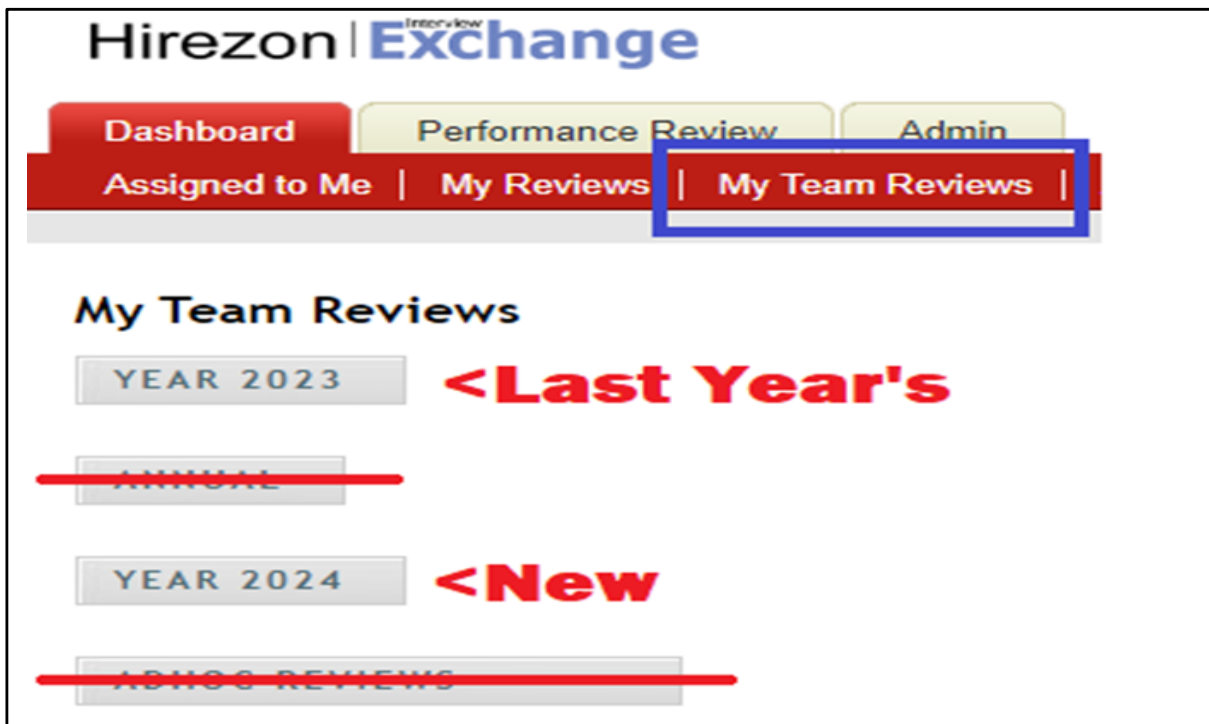


3. The Performance Review Dashboard

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, always use the Year 202X option.
- **Do not select** Annual or AdHoc Reviews.

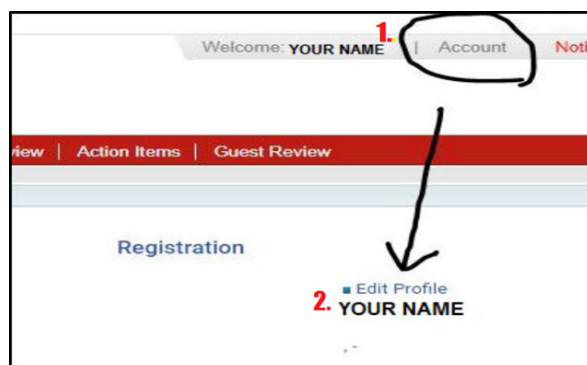
To see Reviews you have created, select "My Team Reviews" and the year.



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

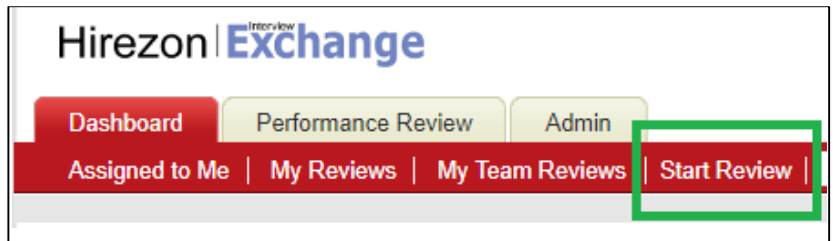
Stop creating the form and correct the job title(s) first, using the 5 simple steps to changing your job title in Interview Exchange.

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.

A screenshot of the 'Create Performance Review' form. The form contains the following fields:

- Employee: Jared Smith [Compensation and Benefits Associate] (with a close icon)
- Position: Compensation and Benefits Associate
- Supervisor: Joyce A Maynard [Mgr. Comp & Benefits] (with a close icon)
- Review Period: Year 2023 (dropdown menu)
- Department: Human Resources (dropdown menu)
- Template: PERFORMANCE PLANNING and EVALUATION (dropdown menu with a help icon)

A green rectangular box highlights the 'Create Form' button at the bottom left of the form.

You can now click on “**Create Form**” to start the process.

5. Send for Self-Review/Evaluation

- As soon as you create the form, immediately scroll to the bottom of the page and click



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

A screenshot of a performance review form. The form has several sections, each with a plus sign and a title: "Self Evaluation - Results of Previously Established Goals", "Self Evaluation - Discussion Questions", "Self Evaluation - Performance", "Self Evaluation - Future Goals & Objectives", "Supervisor Review - Employee ID", "Supervisor Review - Behavioral Summary", "Supervisor Review - Performance Summary", "Supervisor Review - Goal Setting (since last review, if applicable)", "Supervisor Review - Performance/Developmental Goals (if applicable)", and "Supervisor Review - Overall Rating". At the bottom, there is a "Send For Self Review" button highlighted with a green box and a green arrow pointing to it. Other buttons include "Complete Form" and "Go to Routing".

REPEAT THAT FOR ALL YOUR EMPLOYEES

1. Screenshot of the Hirezone Exchange dashboard with the "Start Review" button highlighted in a green box.

2. Screenshot of the "Create Performance Review" form with the "Create Form" button highlighted in a green box.

3. Screenshot of the "Send For Self Review" button highlighted in a green box with the text "CLICK HERE!" above it.

- The Self-Evaluation is voluntary for employees, but they do need to at least Complete the form. The review cannot be submitted for routing if the Self-Evaluation is not submitted, even blank.
- Do NOT create a second review, If you do, transfer all of your information to the version that has the Self-Evaluation, then delete the extra review in your Dashboard.

6. Reviewing and Responding to the Self-Evaluation

- 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

Dashboard

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

My Team Reviews

YEAR 2023

EMPLOYEE	SCORE	APPROVER	CREATED	UPDATED	COMPLETED	STATUS	SELF-REVIEW
RWU Employee	--	--	02/23/2023 03:04 PM EST	02/23/2023 03:35 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.

RWU Employee

Position: Position Title Here Review Period: Year 2023

Supervisor: RWU Hiring Manager Department: Academic Programs, UC

This form is intended to help you and your supervisor prepare for a meaningful discussion about your performance. Please provide information about performance highlights over the past 12 months and identify current and/or future development and career growth opportunities by clicking on the + in each section to reveal the evaluation criteria.
[If you wish not to participate self evaluation this year, please click COMPLETE Form below.](#)

- Self Evaluation - Results of Previously Established Goals

List goals established from your last evaluation and the results achieved. If no goals were set, describe contributions you made during that time.

Click + to expand each section

+ Self Evaluation - Discussion Questions

+ Self Evaluation - Performance

+ Self Evaluation - Future Goals & Objectives

Complete Form

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 Employee

Position: Position Title Here Review Period: Year 2023
Supervisor: RWU Hiring Manager Department: Academic Programs, UC

This form is intended to help you and your supervisor prepare for a meaningful discussion about your performance. Please provide information about performance highlights over the past 12 months and identify current and/or future development and career growth opportunities by clicking on the + in each section to reveal the evaluation criteria.
[If you wish not to participate self evaluation this year, please click COMPLETE Form below.](#)

- Self Evaluation - Results of Previously Established Goals
Non-Scored | Reportable | Visible for Self Review

List goals established from your last evaluation and the results achieved. If no goals were set, describe contributions you made during that time

Employee self-evaluation comments.

Employee response to self-evaluation goes here

If copy icon is clicked, all employee responses are copied into supervisory area. These can be edited by the supervisor

Copy employee comments icon [copy]

7. The Supervisor Review

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

- + **Supervisor Review - Employee ID**
Non-Scored | Reportable
- + **Supervisor Review - Behavioral Summary**
Non-Scored | Reportable
- + **Supervisor Review - Performance Summary**
Non-Scored | Reportable
- + **Supervisor Review - Goal Setting (since last review, if applicable)**
Non-Scored | Reportable
- + **Supervisor Review - Performance/Developmental Goals | (if applicable)**
Non-Scored | Reportable
- + **Supervisor Review - Overall Rating**
Non-Scored | Reportable

Completing the Review

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



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. If you are stumped getting to the next screen, call HR.

- Please remember that all fields in the Supervisor review are “required” which means all fields need to have something in them for the form to complete.

For Example, 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 **Status** 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 **Self-Review** field will 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
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 Acknowledgement	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
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.

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 **Department/Office Head** by clicking on the **Edit** icon  and typing their name, 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.

SAVE!

1. Department/Office Head	NEXT LEVEL SUPERVISOR'S NAME HERE	
2. Employee	Your 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  **Send For Routing**
- This will send the completed form to the person on the first line of the routing, they will appear as **Current Approver**.

1. Employee	Employee Name	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  at the bottom of the page

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.

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  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 "Return to Supervisor" to have the Supervisor make edits and changes.
- You click on "Acknowledge Receipt" to send the review to the Employee.
- In-Person Meeting happens.
- Employee clicks "Acknowledge Receipt" 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 "Acknowledge Receipt"
 - 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 "Acknowledge Receipt" the completed review goes to HR for submission into the library.

Performance Rating Descriptions

O = Outstanding Performance. 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 = Exceeds Expectations. 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 = Meets Expectations. 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 = Not Meeting Expectations. Regularly has difficulty meeting expected quality, quantity, customer service goals, behaviors and/or timeliness standards.