Roger Williams University
Department of Human Resources

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

Instructions for Supervisors

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Department of Human Resources

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 <u>that have been in their position for at least one year.</u>

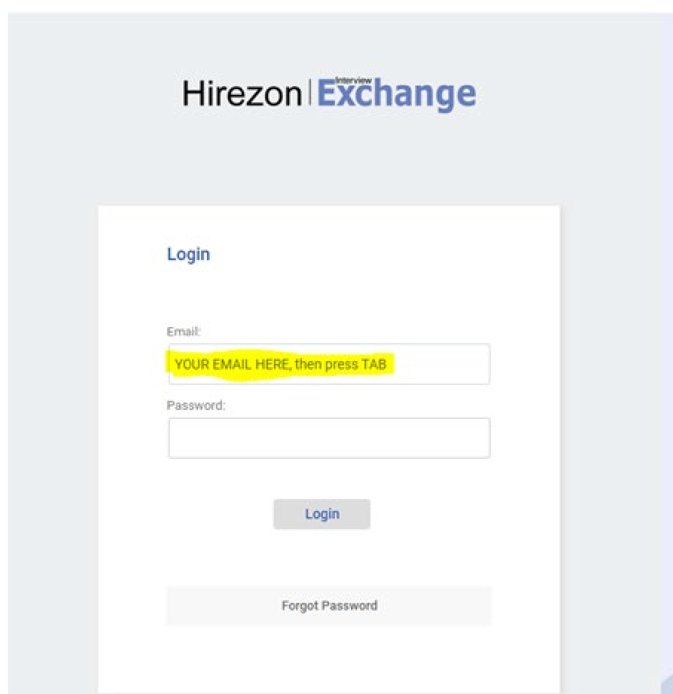
For employees <u>in their position less than one year</u>, please establish Developmental Goals in the Supervisor Review section. They will still receive the voluntary Self-Evaluation.

1. Log into the system using your RWU Single Sign on at:

- **https://sso.interviewexchange.com/rwu/sso.jsp**

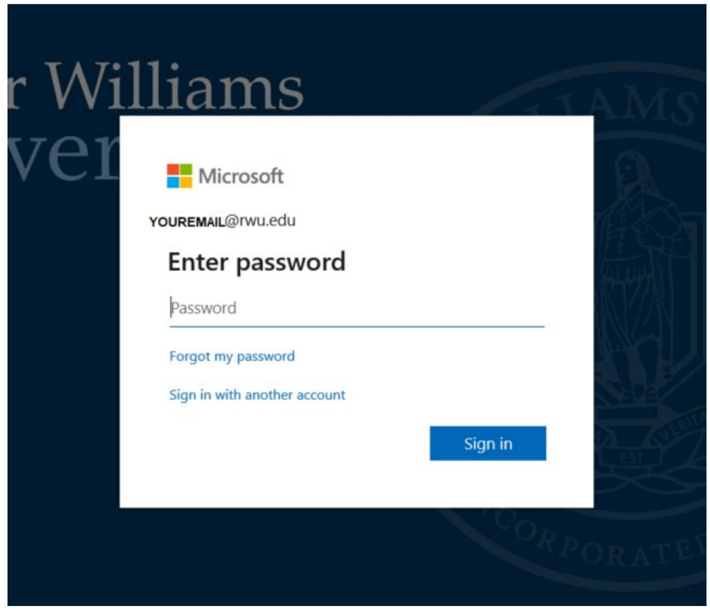
On the Hirezon/Interview Exchange login page, enter your email address and then TAB into the password line.

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

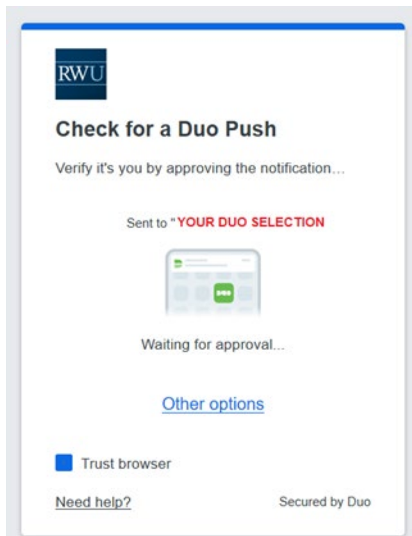


Use the same login as Office365

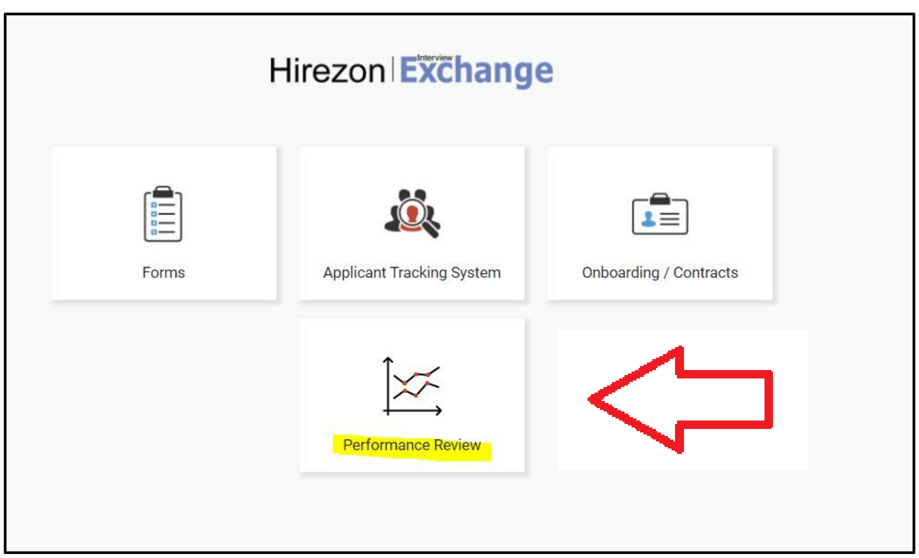
(not necessarily your network password)



You will get a Duo Push for 2-step verification



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

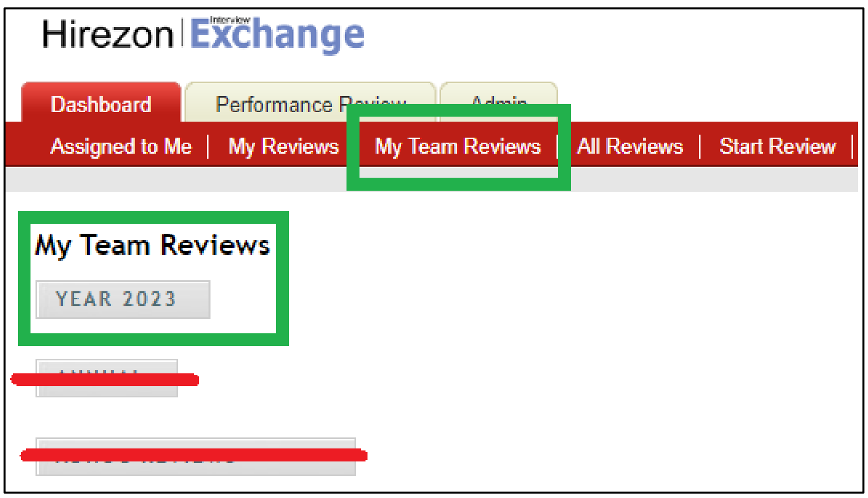


3. The Performance Review Dashboard

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.

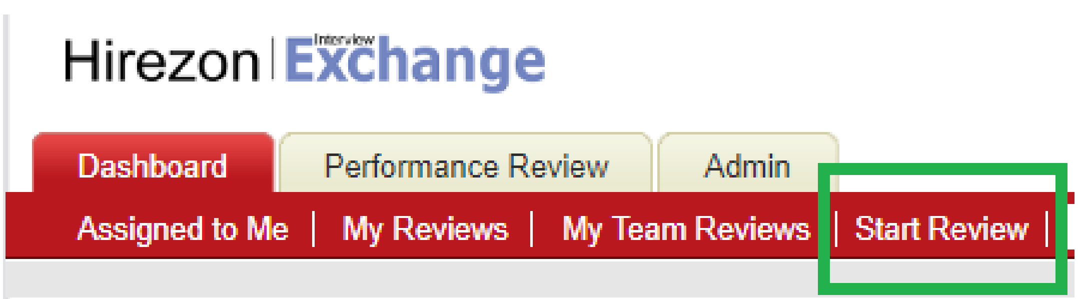
- In the system, always use the **Year 202X** option.
- **Do not select** Annual or AdHoc Reviews.

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



4. Creating a New Review

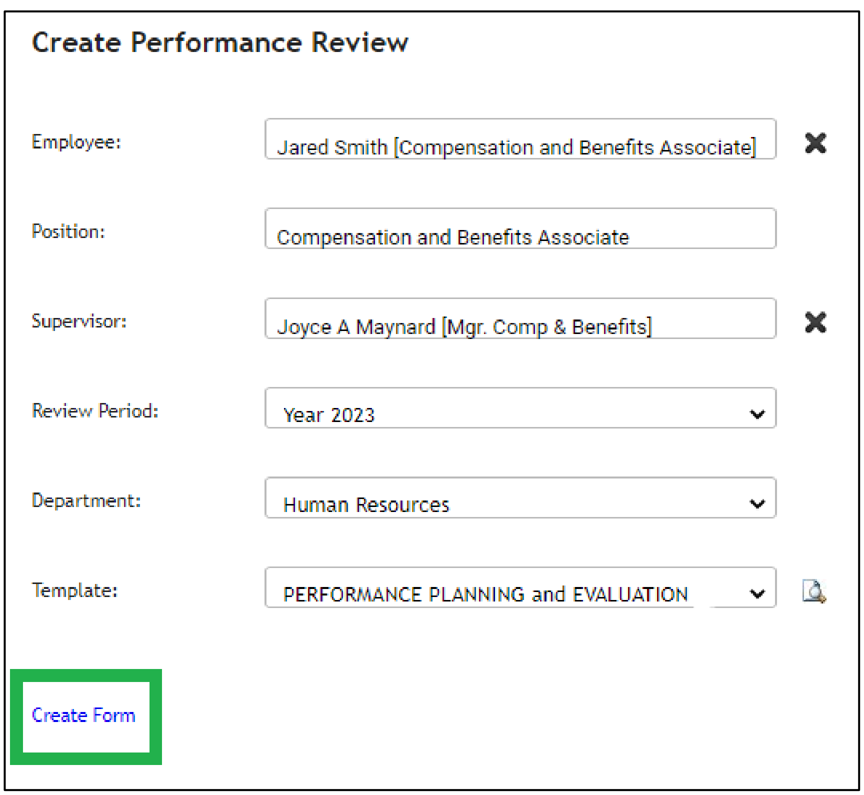
- **Click on "Start Review"**



<u>Here are the Form Categories</u>

- **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 –** If unsure, check the employee listing provided by HR.
- **Supervisor –** This will usually be you.
- **Review Period –** **<u>Always use the current "Year 202X".</u>**
- **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

Create Form

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

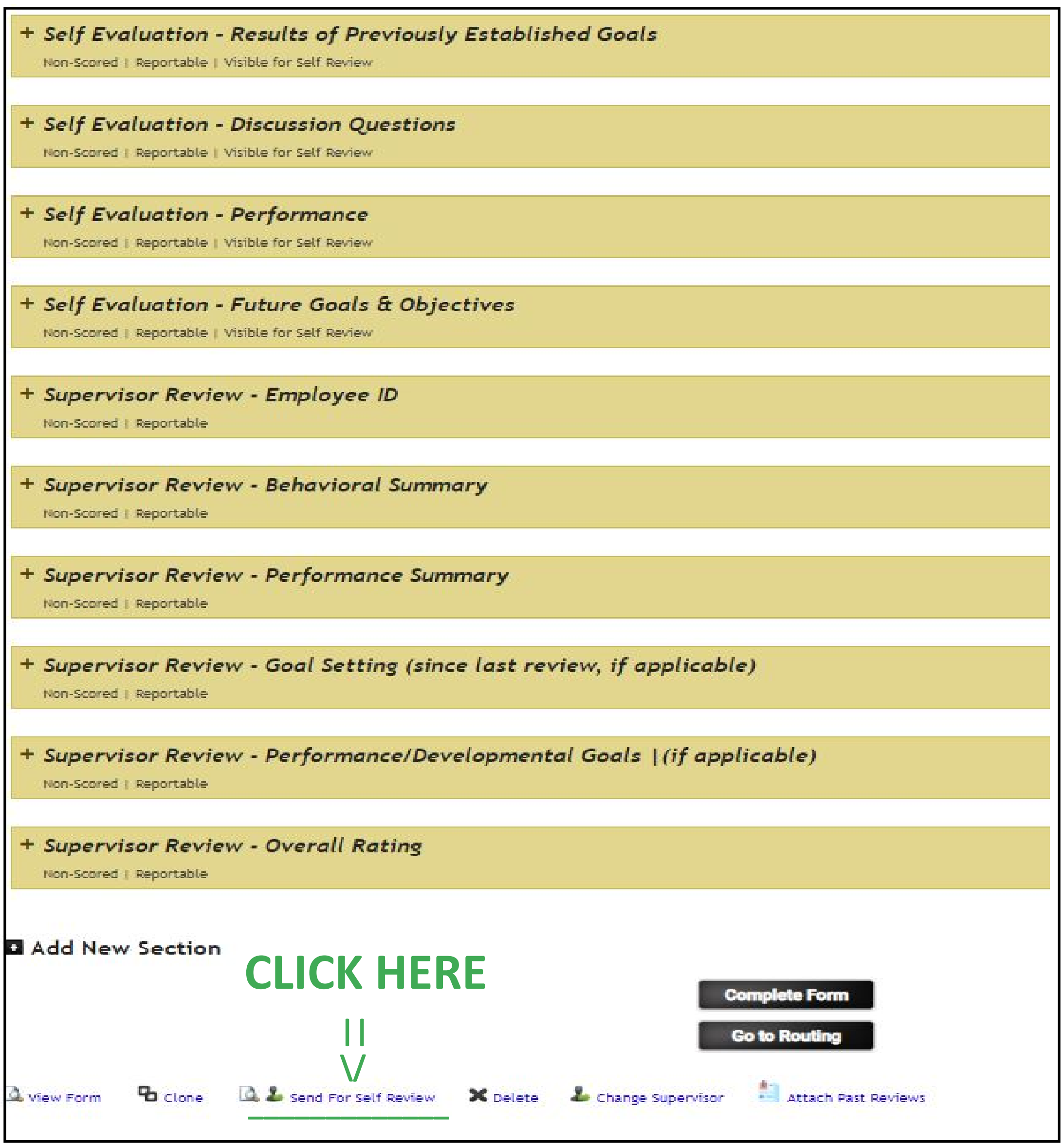
5. Send for Self-Review/Evaluation

- The first step is to initiate the Employee Self-Evaluation.

- Scroll to the bottom of the page and click Send For Self Review which generates an email to the Employee informing them the review has begun and they can now go in and complete their Self-Evaluation.

- The Self-Evaluation is voluntary for employees, but they do need to at least select Complete Form so the Self-Evaluation closes. The review cannot be completed if the Self-Evaluation is not submitted, even if blank.

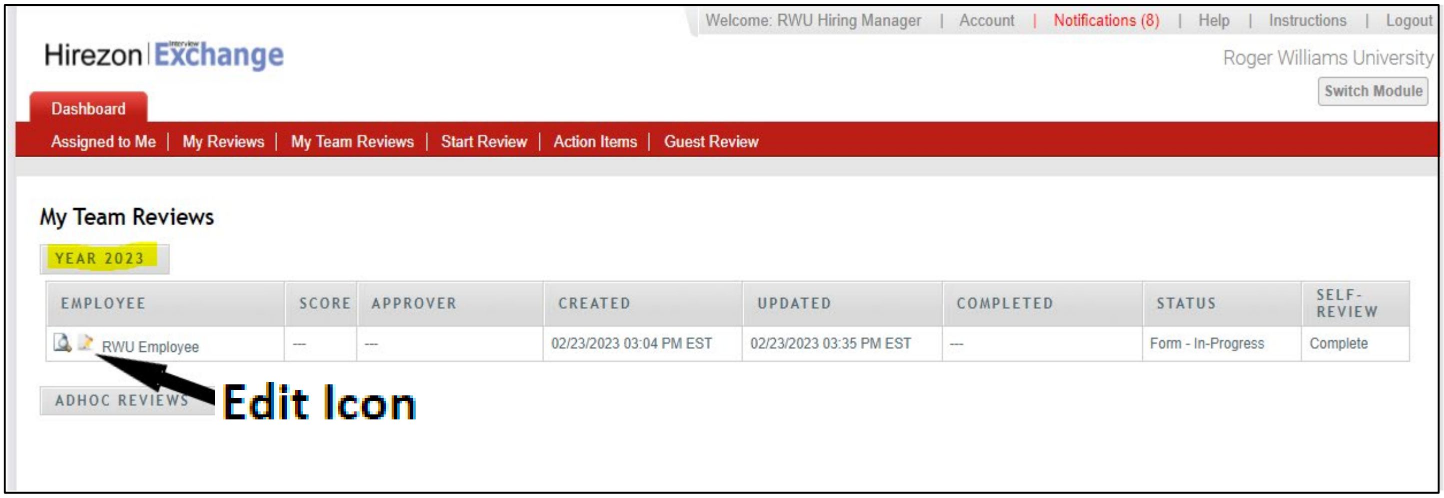
- You do not need to wait for the Employee Self-Evaluation to be completed to begin the Supervisor review. You can start/edit any time.



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

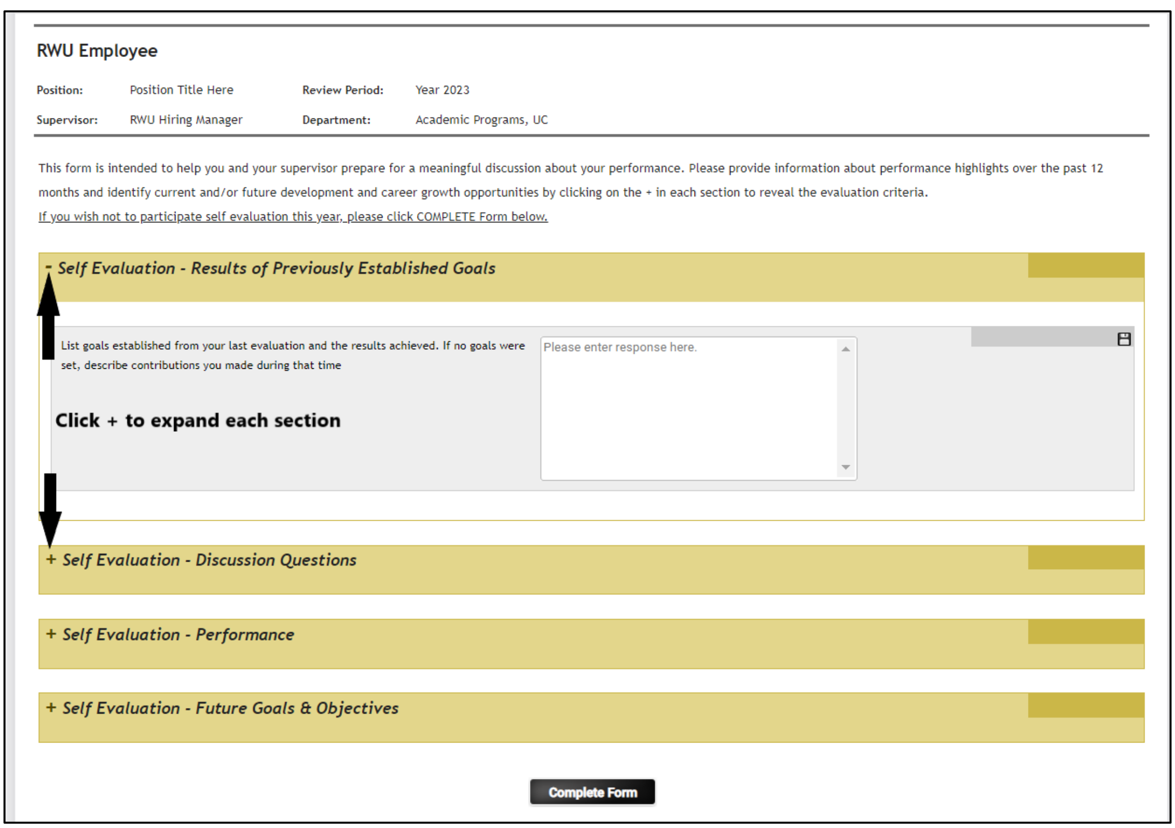
6. Reviewing and Responding to the Self-Evaluation

- 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



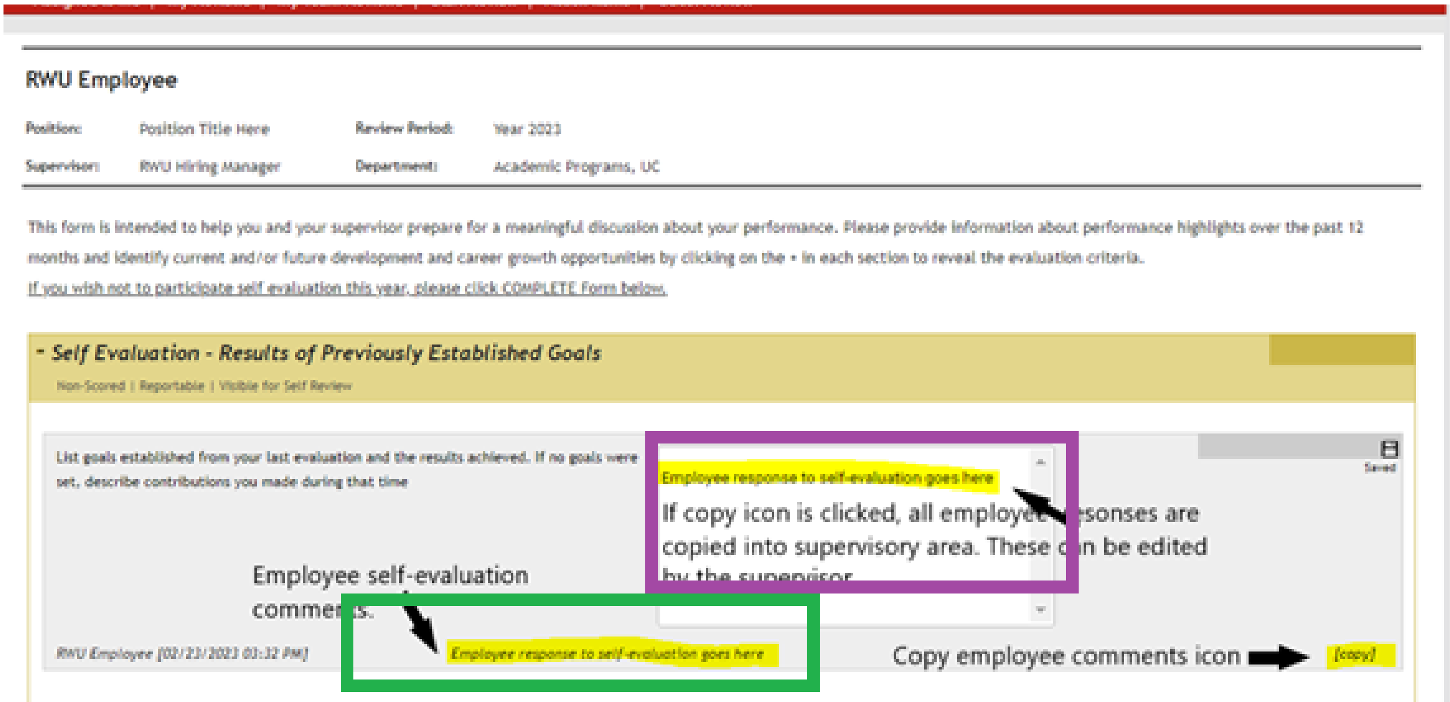
This will take you into the Self-Evaluation

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



Here is what the Self-Evaluation looks like

- The Employee comments are in the **green** box.
- Your response, if any, is entered 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 response to self-evaluation goes here

Saved

RWU Employee [02/23/2023 03:32 PM]

Employee response to self-evaluation goes here

[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

The online review process is based on the existing process.

Below are the sections to complete.

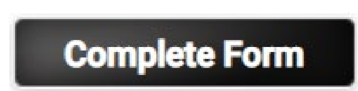
- **Employee ID** *Check the employee listing provided by HR if you don't have that information.*
- **Behavioral Summary**
- **Performance Survey**
- **Goal Setting Since Last Review**
- **Performance & Developmental Goals**
- **Overall Rating**

Completing the Review

You should work with your Supervisor for their input as you are working on the review. When the Self-Evaluation has been Submitted, you have completed the Supervisor review portion, and there are no additional edits to make, click on:

- 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.

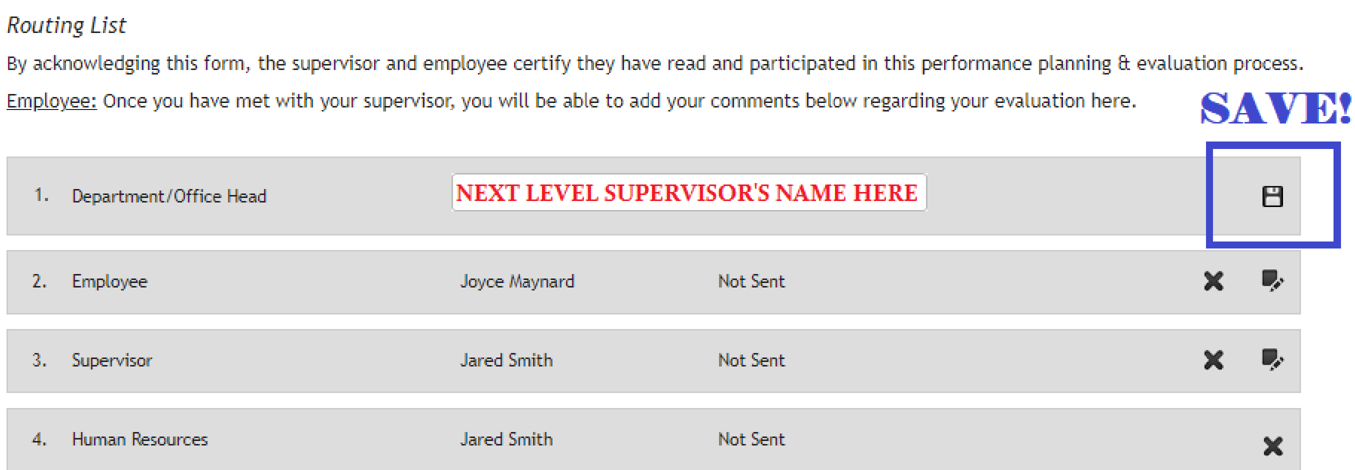
  For Example, if you only have 2 goals but the system is set up for 5, you can just enter "N/A" in the other spaces for goals so the form will complete.

- Another time-saving feature is that your responses are automatically saved so you can start and stop working on the form as needed. You will be able to continue to edit the form until you click on the 

button at the bottom of the page.

8. The Routing Window & Employee Responses

Once you have clicked **Complete Form** the Template Routing screen will appear. 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 the first few letters of their first name and selecting the appropriate individual from the list. 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	Joyce Maynard	Not Sent
3.	Supervisor	Jared Smith	Not Sent
4.	Human Resources	Jared Smith	Not Sent

- Once the routing is correct, click on Send For Routing
- This will send the completed form to your Supervisor for review and possibly for comment.
- You should discuss the review with your Supervisor before this point.
- **If needed,** your Supervisor will return the form to you for editing.
- Otherwise, your Supervisor will click on **Acknowledge Receipt** to send the review to the Employee, for the In-Person meeting.
- If your Supervisor returns the form for editing, you will need to click on **Complete Form** and then Send For Routing to repeat the process.
- Once your Supervisor has approved the form, you will see the Employee is now listed as "Current Approver" so they can review the evaluation, and respond if they wish, in preparation for your In-Person meeting.

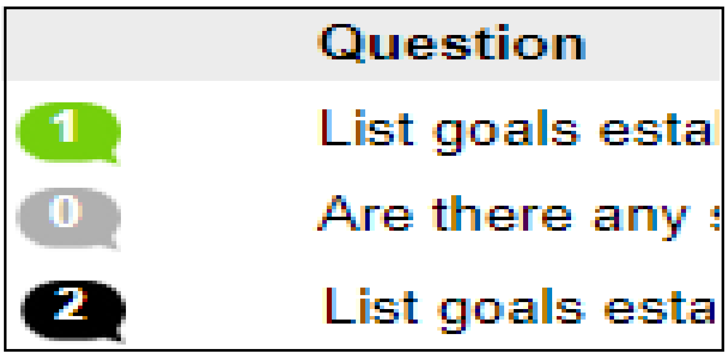
Employee Responses & Comments – "Discussions"

In preparation for the In-Person meeting, Employees can leave comments for all parts of the review, called Discussions.

As part of your preparation for the In-Person meeting, you will need to be sure and review any comments made on the form to discuss in the meeting. Be sure to let the Employee know when you are ready to begin your preparation, so they can complete any comments while giving you adequate preparation time.

You are able to see comments using the View Icon next to the Employee's name in "My Team Reviews". You will see them in real time as the Employee enters them, but you will not be notified by the system.

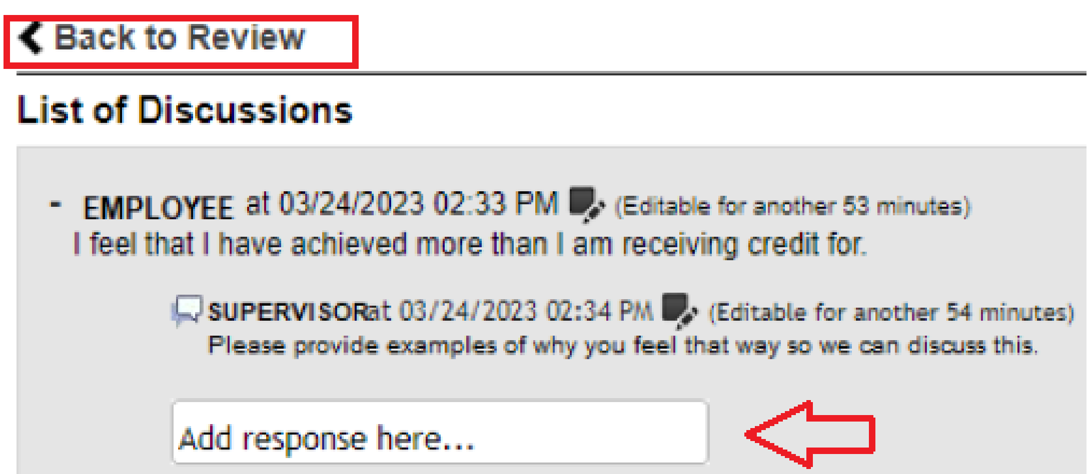
Here is what it looks like when an Employee leaves a comment.



- Click on the icon to open the Discussion.
- Those in green have not been viewed by you.
- When you view the Discussion the icon will turn **black**.

Responding to Employee Comments as Discussions

After the meeting, the Employee may ask that you respond to a Discussion comment on the review. You respond to a Discussion by clicking on the "+" sign next to it. Add in your response and then click "Back to Review".



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 "Edit and Resend" 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 **Complete Form**
- In the Routing screen click on Send For Routing at the bottom of the page

This will send the updated review to your Next Level Supervisor and then the Employee.

9. Finalizing the Review

If the Employee requires no changes, or any changes have been made, any Discussions requiring a response are complete, and the form is in routing, the Employee will click on **Acknowledge Receipt** which sends the form back to you.

Once you also click on **Acknowledge Receipt** the form will be routed to Human Resources.

The Review process is now complete!

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

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Next Level Supervisors

- **Work with your Supervisors through the review process.**
- **You see the final review in the system before the Employee.**
    - **You will receive an email from the system.**
- **If you have edits, communicate them outside of the system.**
    - **Discussions are visible to everyone and are permanent.**
- **If applicable, click "Edit and Resend" to have the Supervisor make edits/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"**
- **The review then goes to the Supervisor who clicks "Acknowledge Receipt" to send the review to HR.**

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.