How to Guide:

**Reassignment/Extra Service Request**

Interview Exchange
Electronic Forms Module
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Login to Interview Exchange

1.) Click this link to login to your Interview Exchange account.

2.) Use your general department/office email address and password to login.

3.) Click on this icon:

![Forms](image)

4.) This will bring you to your main Dashboard.

User Dashboard

*Tab: Created by me*

**Incomplete Forms:** Forms created by you and have not yet been sent for approval or completed.

**Completed Forms:** Forms created by you which are now completed.

**Published Forms:** Forms created by you which are pending task completion or routing review and approval.

**Waiting for Form Approval:** Forms created by you and waiting for approval from others.

**Waiting for Task Approval:** Forms created by you and have tasks waiting for approval from others.

**Guest Reviews:** User can view forms in read-only mode with no action required by them.
*Tab: Assigned to me*

**Task Assigned to Me:** Forms created by other users and tasks assigned to you for completion.

**Form Approval:** Forms created by other users and are pending review and approval by you.

**Task Approval:** Forms created by other users with tasks pending review and approval by you.

**Guest Reviews:** Forms available to you in read-only mode with no action required.

*Note: User can view all completed Forms/Tasks by clicking the Show Completed checkboxes.*
How to Start Form

+Start Form – Look for this icon in the top right corner of your screen, click this button. It will bring you to this screen:

Steps:

1.) Select the department this employee works for.
2.) Select the category: Personnel Records.

3.) Select the template: Reassignment/Extra Service Request.

4.) Enter the Employees Name.

Note: This section does say Title/Name- do not enter the title of this employee- it must be the employees name. This will allow for easy recognition when going through the approval process.

5.) Click: Create Form

This will be the next screen:

**John Smith-TEST**

Form Id: 46404

Reassignment/Extra Service Request

* Reassignment/Extra Service Request
  - Reassignment and Extra Service Request 463720

Attach Position Description

Instructions:

Attach a position description if necessary:

**Choose File** No file chosen

(Optional File comment (description, etc.)

Save

Attach Prior Work Performance

Instructions:

Please attach a brief summary or evaluation from the Chair or Dean about prior work performance to support the request reassignment/extra service request.

**Choose File** No file chosen

(Optional File comment (description, etc.)

Save

Discussions

Send for Next Action
6.) Click: Reassignment and Extra Service Request- it will bring you to this screen:

7.) Complete the Reassignment and Extra Service Request form with all of the required and applicable information. The last section of the form is the Employment Action Justification which is **required** for all Reassignment/Extra Service Requests. Click Save & Submit. Then click Continue.
8.) You will be back to this screen:

9.) You will now see a check mark next to the form showing you that task is complete. Next you can upload a position description and prior work performance documentation if necessary by clicking on the Choose File drop box and click Save.

10.) After you have uploaded all of the appropriate documents. Click on the “Task Routing” in the top right corner. This is where you will setup the task routing for the appropriate approvals. Click on the pencil icon on the right:

It will drop down to this screen:
Click in the box under “User” and type in the individual’s name or if the approver is a certain department type the department name. The email should pop up and you click on it to autofill into the box. Once selected you have the option to write in any instructions or comments in the box then click Save Routing.

*Note: Do not enter the employee/department email—it will not pop up. It must be a name then the email will pop up.*

**Approver Title Email Guidance:**

**Faculty/Employee:** Type in the individual’s name that the reassignment/extra service request is for. They must review first.

*Note: If the individual’s email does not pop up please contact hr@oswego.edu and we can add them to the system.*

**Chair/Supervisor:** Department Chair or Supervisor. Depending on your department’s internal process enter either the individual’s email or general department email.

**Department Head/Dean:** Depending on the department/areas internal process enter either the individual’s email or general department email. If Dean’s Office please use general email:
- School of Business: business@oswego.edu
- College of Liberal Arts & Sciences: clas@oswego.edu
- School of Communication Media & the Arts: scma@oswego.edu
- School of Education: educate@oswego.edu

**Provost/Vice President:** Depending on the division you are in will determine the general email you enter:
- Academic Affairs: provost@oswego.edu
- Student Affairs: jerri.howland@oswego.edu
- Alumni & Development: develop@oswego.edu
- Administration & Finance: adminfinance@oswego.edu

**Finance Office:** The Finance Office email is hard-coded into the task routing so you do not need to enter anything.

**Payroll:** The Payroll Office email is hard-coded into the task routing so you do not need to enter anything.
Note: For most departments, you will be using their general emails instead of an individual’s name. This will allow for all forms in each department to be located in the same dashboard and for more than one individual in a department to have access to these forms and to create them if needed.

11.) Once the Task Routing is setup and complete, exit out. You will return to this screen:

Click on **Send for Next Action**. This submits the form to the first approver.

**Task Routing Features**

**Check Status:**

1.) As the creator of the form and any approver of a form you can view the task routing at any time and check to see where it is in the approval process.

**Creator Steps:**

a.) Go back to your Dashboard screen, go to the **Waiting for Task Approval** section. This is where your forms will be when still in the task routing approval process.

b.) Find the form you want to review. Click on the box with pencil icon to the left of the form title. It will bring you back to this screen:
c.) Click on Task Routing in the upper right corner. This will bring you to the task routing screen and you can see all approvers, the date and time the form was approved and what approver the form is sitting with.

**Approver Steps:**

a.) Go back to your Dashboard screen, click on the Show Completed box in the Waiting for Task Approval section. Once you click on that box, the section will be renamed to Completed Task Approval and all forms will be listed that you have approved.

b.) Find the form you want to review. Click on the magnifying glass on the left of the form title.

c.) This will bring the task routing screen up to show you all of the approvers, the date and time the form was approved and what approver the form is sitting with.

**Friendly Reminder:**

2.) As the creator of the form you are able to send a “reminder” to an approver within the task routing. Note: This feature can only be used once within a 24 hour time-period.

**Steps:**

a.) Go back to your Dashboard screen, find the form you want to review within the Waiting for Task Approval section.

b.) Click on the box with the pencil icon on the left of the form title.

c.) Click on Task Routing icon in the top right of your screen.

d.) This will bring you to the Task Routing screen. You can view what approver the form is sitting with.
e.) To send a friendly reminder, click on the bell icon next to the approver’s name under “Actions.” This will automatically send an email to the approver to review this specific form.

*Note: Please be respectful with this feature and only send reminders when absolutely necessary.

Comments Box:

3.) Within the task routing the creator and any approvers may write a comment when approving/denying a form. This feature allows us to communicate certain information to everyone within the task routing that may be important to know and document.

*Note: These comments cannot be deleted and will be a permanent record with the form.

See Changes Made to Form:

4.) If a change was made to a form the creator can see what the change was within the task routing. If you click on the box with the pencil next to the form, then click on “Tasking Routing” in the top right corner. It will bring you to the task routing screen and you will see a clock with an arrow around it next to the approver who made the change- click on that icon and you will see the changes made.

Additional Approver:

5.) If there is a Reassignment/Extra Service Request that requires an additional approver that is outside of the normal task routing approvers the following process should be followed:

Steps:

a.) The creator of the form should indicate in the comments box when initially sending the Reassignment/Extra Service form that such “department/individual” must be an additional approver.

b.) Once the form gets to the Finance Office, they will re-route the Reassignment/Extra Service form to the specified department/individual for approval.

c.) The approval/denial process will be the same. This department/individual will receive an email to approve/deny. Once they complete the task the Reassignment/Extra Service form will continue through the set task routing approvers.
How to Review/Approve Form

As an approver within the task routing process you will receive an email to review and either approve or deny a form.

Steps:
1.) Receive general email requesting you to review the form:

2.) Login into your Interview Exchange account and go to your Dashboard. Click the tab on the top: Assigned to Me.

3.) The forms that are requiring your review and approval/denial will be in the section titled Waiting for Task Approval:

4.) Click on the box with pencil icon next to the form and it will bring you to this screen:
5.) Click on Reassignment and Extra Service Request and review the information on the form. When you are finished reviewing click the X in the top right to exit out of the form. It will bring you back to the screen above.

*Note: The Chair/Supervisor, Department Head/Dean, Provost/Vice President, Finance Office and Payroll Office approvers can edit the form if necessary.

6.) Next, you can click on the position description and prior work performance documents if any were uploaded to review.

7.) You then have the option to enter any comments if you’d like and click Approve or Deny.

*Note: As a reminder the comments and discussion box available to communicate with the creator and all approvers cannot be deleted and will become a permanent record with this Reassignment/Extra Service Request.

8.) Once you click approve, an automatic email will be sent to the next approver within the task routing.

**Denied Form Process**

1.) If an approver within the task routing has to deny a form, they have the option by clicking the deny button instead of the approve button when it gets to them in the process.
2.) That approver will have to put in a comment before submitting. If it is something that can be edited on the form, please indicate in the comments box so the creator can edit and resubmit the form.

3.) If a form is denied, only the creator will receive an email letting them know the form was denied. Anyone within the approval task routing process will still be able to see this form within their dashboard and if they click on the magnifying glass to view - they will see a big red X in the top left corner to show the form was denied and with the comments the approver who denied entered.

4.) If the form can be edited and resubmitted, the creator must:

   **Steps:**
   a.) Click on the box with pencil on the left of the form.
   b.) It will bring you to this screen:
   c.) Click on the …Actions drop down in the top right, and click “Mark as Incomplete.”
   d.) Click on the same …Actions drop down in the top right, and this time click “Republish.”
   e.) You will see the red comment stating to complete the tasks. Click on the Reassignment and Extra Service Request.
   f.) This will open up the form you submitted, you can then make edits. Click Save and Submit. Then next screen, click Continue.
   g.) If the task routing is the same, you can click Send for Next Action. If any of the approvers in the task routing need to be changed before you submit, you can make changes by clicking on Task Routing in the top right to edit.
   h.) This will email the first approver again for this form and through the approval process.

5.) If the form was denied for other reasons that cannot be edited the creator must:

   **Steps:**
a.) Forward the automatic denial email they received from Interview Exchange to everyone who already approved the form and HR.
b.) HR will then “close out” the form.

**Completed Forms**

Once a form has been approved by everyone in the task routing process the form is considered complete and ready to process.

If you created a form or was an approver of a form you will see all of those forms within your Dashboard.

See the steps below on where to find all of the completed forms depending on if you were the creator of the form or an approver.

If you were the *creator* of the form you will first receive an automatic email stating the form you submitted is complete:

```
To find the completed forms:

Steps:
   a.) Login to your Interview Exchange account and go to your Dashboard.
   b.) Click on the Created by me tab at the top:
   c.) Then look in the **Completed Forms** section in the top right of your screen:
```

![Completed Forms table](image)
d.) You will be able to view any of the forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:

![Image of the preview screen]

Form ID: 46404
Template: Reassignment/Extra Service Request v8/27/20
Originator: Test Oswego
Created: 08-28-2020 10:40 AM EDT
Completed: 08-28-2020 03:09 PM EDT

John Smith-TEST

Reassignment/Extra Service Request
Completed: 08-28-2020 03:09 PM EDT [Test Oswego]
* Reassignment/Extra Service Request
  Reassignment and Extra Service Request v82720

Attach Position Description
Instructions:
Attach a position description if necessary:

Test.docx

Comment: No Comment

Attach Prior Work Performance
Instructions:
Please attach a brief summary or evaluation from the Chair or Dean about prior work performance to support the repeat reassignment/extra service request.

Test.docx

e.) You have the option to download into a PDF in the top right corner so you can print or save each completed/approved RTF.

If you were an approver of the form:

Steps:

a.) Login to your Interview Exchange account and go to your Dashboard.
b.) Click on the Assigned to me tab at the top of your screen:

c.) Look at the Waiting for Task Approval section- find the Show Completed box and click on it, the section will now be named Completed Task Approval and the Show Completed box has a blue check mark:

![Image of the completed task approval screen]

Completed Task Approval
ID Title Originator Template Updated
46404 John Smith-TEST Test Oswego Reassignment/Extra S- 08/28/2020

d.) You will be able to view any of the forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:
f.) Click on the **Reassignment and Extra Service Request**. You have the option to download into a PDF in the top right corner so you can print or save each completed/approved Reassignment/Extra Service form.