How to Guide:

Unclassified Service Appointment Form

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:

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.
Note: This should be the department the creator of this form also works in. Each user (creator of form) only has access to the department they currently work in or will need to request access to another department (if applicable) by contacting the Human Resources Office at hr@oswego.edu.

2.) Select the category. The Unclassified Service Appointment Form is located in: Personnel Records.

3.) Select the template: Unclassified Service Appointment Form.

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:
6.) Click on: **Unclassified Service Appointment**  
This will be your next screen - the appointment form you will fill out and complete.

7.) Complete the Unclassified Service Appointment Form with all of the required and applicable information to the appointment. The last section of form is the Employment Action Justification.  
Click here for guidance to see if your request requires justification.

**Employment Action Justification**

Click here for Employment Action Justification guidelines.

- Is this Appointment a Full Time Term Professional Renewal?  
  --Select--  

- Please select the SUNY criteria that justifies this position:  
  --Select--  

- SUNY criteria description  

- Please include an explanation as to how this action specifically meets the SUNY criteria selected above?  

- Describe the critical need for this action, including but not limited to, the impact on the College if this action is not taken?  

**Note:** If the appointment you are submitting is a **FT Term Professional Renewal**- you must select yes in the drop down and the employment actions justification section will not be required. All other appointment types must select no in the drop down and will be required to complete the employment actions justification section.
Click Save & Submit. Then click Continue.

8.) You will be back to this screen:

9.) Next, click on the “Task Routing” in the top right corner.

10.) 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 any instructions or comments in the box then click **Save Routing**. Do this for the first three approvers. The rest are auto-filled for you.

*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:**

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

**Dean/Director/Administrative Officer:** Dean, Director of department/area or Administrative Officer. Depending on the department/areas internal process enter either the individuals email or general department email. If Dean’s Office please use general email:
- School of Business: [business@oswego.edu](mailto:business@oswego.edu)
- College of Liberal Arts & Sciences: [clas@oswego.edu](mailto:clas@oswego.edu)
- School of Communication Media & the Arts: [scma@oswego.edu](mailto:scma@oswego.edu)
- School of Education: [educate@oswego.edu](mailto:educate@oswego.edu)

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

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

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

**Human Resources:** The Human Resources 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.
b.) Click on the box with the pencil icon on the left of the form title under “Actions.”
c.) Click on Task Routing with the circle arrows 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.

Example: “Please note this is grant funded….etc.”

*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 an appointment for example that requires an additional approver for funding 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 appointment form that such “department/individual” must be an additional approver due to the funding source.

b.) Once the form gets to the Finance Office, they will re-route the appointment form to the specified department/individual for approval. Note: All GA appointments will also be re-routed to the Graduate Studies Office.

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 appointment 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 Unclassified Service Appointment 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 Dean/Director/Administrative Officer, Provost/Vice President, Payroll, Finance and HR approvers can edit the form if necessary.

6.) 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 appointment.

7.) 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.) This will bring you to this screen:

f.) You will see the red comment stating to complete the tasks. Click on the **Unclassified Service Appointment**.

g.) This will open up the form you submitted, you can then make edits. As a reminder: be sure to check the revised box are the top of the form. Click Save and Submit. Then next screen, click Continue.

h.) 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.

i.) 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:
d.) You will be able to view any of these forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:

![Preview](image)

![OSWEGO](image)

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

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:

![Assigned to me](image)

c.) Look at the **Waiting for Task Approval** section- find the Show Completed box and click on it:
d.) It will bring you to this screen. The Show Completed box has a blue check mark and the section is now named **Completed Task Approval**:

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Originator</th>
<th>Template</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>37311</td>
<td>Harrison Holmes</td>
<td>Leah Holmes</td>
<td>Unclassified Service Aj</td>
<td>05/01/2020</td>
</tr>
<tr>
<td>37416</td>
<td>John Smith</td>
<td>Leah Holmes</td>
<td>Unclassified Service Aj</td>
<td>04/30/2020</td>
</tr>
<tr>
<td>37761</td>
<td>Michael Jordan</td>
<td>Leah Holmes</td>
<td>Unclassified Service Aj</td>
<td>04/30/2020</td>
</tr>
<tr>
<td>37314</td>
<td>GA- L. Higgins</td>
<td>Devin M Higgins</td>
<td>Unclassified Service Aj</td>
<td>04/27/2020</td>
</tr>
<tr>
<td>37257</td>
<td>Ziggy Ciccarelli</td>
<td>Holly DeMar</td>
<td>Unclassified Service Aj</td>
<td>04/23/2020</td>
</tr>
</tbody>
</table>

11 to 15 of 17 Records

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e.) You will be able to view any of these forms by clicking on the magnifying glass on the left of the form and it will bring you to this preview screen:

<table>
<thead>
<tr>
<th>Maggie Thompson</th>
</tr>
</thead>
</table>

**Unclassified Service Appointment**

Completed: 05-06-2020 03:54 PM EDT [Leah Holmes]
* Unclassified Service Appointment
  ✓ Unclassified Service Appointment -5/7

Task Routing

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f.) Click on the **Unclassified Service Appointment**. You have the option to download into a PDF in the top right corner so you can print or save each completed/approved form.
Unclassified Service Appointment Form

Employee Information

First Name: (Required)  
Last Name: (Required)  
IE Posting ID# (if applicable):  
Revised:  
If this was a searched position and posted in Interview Exchange you can enter the Job Posting ID number.  
Check this box when you are submitting a revised form.  
Home Address: (Required)  
City: (Required)  
State: (Required)  
Zip: (Required)  
Campus Building: (Required)  
Office/Room#  
Banner # (if applicable):  

Appointment Information

Choose Appointment Request: (Required)  
If other changed selected, please specify in the box below:  
Employment Type: (Required)  
Appointment Type: (Required)  
Work Obligation: (Required)  
If other is selected, please specify in the box below:  
Line # (if applicable):  
PSR   TS   [Line Number]   This is not required. If you do not know, it will be completed by the Finance Office.  
Previous individual in this position:  
Position Type: (Required)  
Part-Time (requires %)  
This % determines eligibility for health insurance and is required if employee is part-time.  
Salary:  
Salary Increase (if applicable):  

1 There are five options to choose from: New Hire, Renewal, Promotion, Salary Increase, Other Change.  
2 There are four options to choose from: UUP, MC, GA, Tech. Casual.  
3 There are four options to choose from: Term, Temporary, Permanent (Professional Only), Continuing (Faculty Only)  
4 There are four options to choose from: Annual, 10-Month, Semester, Other  
5 There are three options to choose from: Full-Time, Part-Time, GA
GA Tuition Scholarship (if applicable): Department: (Required)
This field will auto populate based on the department you choose when you started the form.

Effective Begin Date: Effective End Date:

Supervisor: (Required) Local Title: (Required)

State Title: (Required) SL: (Salary Level)
Click on State Titles for the link to all the titles available with salary levels.

Comments:
Any additional comments can be added here.

Account Information

%:_______________ Acct. to be charged:____________
%:_______________ Acct. to be charged:____________
%:_______________ Acct. to be charged:____________

Note: You are able to indicate up to 3 accounts that may be charged for each appointment. If there is more than 1 account charged, it is **required** to indicate the percentage of each account.

Part-Time Faculty Only

Number of courses: Number of courses with enrollment of 90 students or more (if applicable):

Total credit hours or credit hour equivalent: Comments:

Note: This section is **required** to be completed for all part-time faculty. This will assist in determining the correct salary and also eligibility for health insurance.

Employment Action Justification

Is this Appointment a Full Time Term Professional Renewal? Drop down- Yes or No

*If yes- you do not need to complete the employment action justification.
*If no- you must complete the employment action justification.

Please select the SUNY criteria that justifies this position: SUNY criteria description:

*When you select one of the drop down options the description will pop up on the right.
Please include an explanation as to how this action specifically meets the SUNY criteria selected above?

Describe the critical need for this action, including but not limited to, the impact on the College if this action is not taken?

Describe all other possible alternatives that have been explored for fulfilling these responsibilities (reassignment of work to existing staff within your department, division or another campus area, reorganization, reclassification of position, decrease of FTE, eliminate duties, etc.):

Describe the overall impact on FTE, headcount, and/or budget (salary/compensation) this action will have on your unit:

Demonstrate the specific cost and savings to your budget. How much cost savings will this generate?