

How to Guide:

GRADUATE ASSISTANT APPOINTMENT FORM

Interview Exchange
Electronic Forms Module



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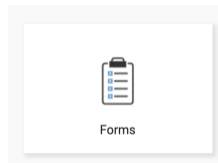
Login to Interview Exchange

- 1.) [Click here](#) to sign into Hirezon/Interview Exchange using single sign on.
- 2.) You will then enter your Laker NetID and password, click Login and it will direct you to the main Hirezon/Interview Exchange page.

****For department Hirezon/Interview Exchange accounts you will login using the same login [link](#) and your Interview Exchange department email and associated password.**

Note: If you have a non-Oswego email address you will continue to login with your individual Hirezon/Interview Exchange account credentials (email address and associated password) through [this link](#).

- 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.

0

Created by me

0

Assigned to me

2

Guest Reviews

+ Start New Form

Incomplete Forms

ID	Title	Originator	Template	Updated
No Records Found				

Completed Forms

ID	Title	Originator	Template	Updated
No Records Found				

Published Forms

ID	Title	Originator	Template	Updated
No Records Found				

Waiting for Form Approval

ID	Title	Originator	Template	Updated
No Records Found				

Waiting for Task Approval

ID	Title	Originator	Template	Updated

Guest Reviews

ID	Title	Originator	Template	Updated

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.

0

Created by me

0

Assigned to me

2

Guest Reviews

+ Start New Form

Tasks Assigned to Me ?

Show Completed

ID	Title	Originator	Template	Updated
10522	Liz Employee	HR Super Admin User	Staff Development	07/22/2019

1 — Records from 1 to 1 of 1

Waiting for Form Approval ?

Show Completed

ID	Title	Originator	Template	Updated
----	-------	------------	----------	---------

No Records Found

Waiting for Task Approval ?

Show Completed

ID	Title	Originator	Template	Updated
----	-------	------------	----------	---------

No Records Found

Guest Reviews ?

ID	Title	Originator	Template	Updated
11087	Chemistry Instructor	HR Super Admin User	Position Management	05/29/2018
10123	HR Assistant	HR Super Admin User	Request to Fill Demo	04/22/2018

1 — Records from 1 to 2 of 2

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:

Hirezon|EXchange

SUNY Oswego

Dashboard

Leah Holmes

Notifications (36)

Help

Instructions

Logout

Start New Form

Department:

--Select--

Category:

Template:

Title/Name: ?

Create Form

Steps:

1.) Select the department this Graduate Assistant works for.

The screenshot shows the 'Start New Form' interface. The 'Department' dropdown is open, showing a list of departments including Admissions, Accessibility Resources, Accounting, Finance & Law, Admissions (highlighted), Advisement Center, Alumni & Parent Relations, Anthropology, and Art. A modal window from 'www.interviewexchange.com' is displayed, stating: 'You selected the Admissions department. Please click OK to confirm this department.' It includes a note: 'Note: Departments can not be changed after Form creation. An incorrect department may result in a denial during the Form approval process. If you do not have access to the correct department, *Do Not Proceed*. Contact your Administrator for access to the correct department.' The modal has 'Cancel' and 'OK' buttons.

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 Graduate Assistant Appointment Form is located in: Personnel Records.

3.) Select the template: Graduate Assistant Appointment Form.

4.) Enter the Graduate Assistants' Name.

Note: This section does say Title/Name- do not enter Graduate Assistant- it must be the Graduate Assistants name. This will allow for easy recognition when going through the approval process.

The screenshot shows the 'Start New Form' page with the following fields filled out: Department: Human Resources, Category: Personnel Records, Template: Graduate Assistant Appointment..., and Title/Name: John Smith. The 'Create Form' button is visible at the bottom.

5.) Click: **Create Form**

This will be the next screen:

The screenshot shows the form creation screen for 'John Smith-TEST' (Form ID: 59526). It displays the 'Graduate Assistant Appointment Form' template. There are checkboxes for 'Graduate Assistant Appointment Form' (checked) and 'Graduate Assistant Appointment Form' (unchecked). Below these is a 'Discussions' section with a 'Start New Discussion' link. At the bottom, there is a 'Send for Next Action' button.

6.) Click on: [Graduate Assistant Appointment Form](#)

This will be your next screen- the appointment form you will fill out and complete.

Graduate Assistant Appointment Form

OSWEGO
STATE UNIVERSITY OF NEW YORK

Graduate Assistant Appointment Form

Employee Information

*First Name: *Last Name: Campus Building: --Select-- Banner #: ☐ Revised

*Home Address: *City: *State: *Zip:

Appointment Information

*Choose Appointment Request: --Select-- If other change selected, please specify below:

Employment Type: Graduate Assistant Appointment Type: Temporary

*Work Obligation (If other, provide comments below): --Select-- If other selected, please specify below:

Line # (if applicable): **Save & Submit**

NEW: Under the Account Information section of the appointment form, you can now list the Tuition Scholarship Account in addition to the Stipend Account.

Account Information

Note: If more than one account should be charged, please indicate dollar amount/percentage for each.

Stipend Account

(\$/%) Acct (1) to be charged (E.g. 860603-00):

(\$/%) Acct (2) to be charged (E.g. 860603-00):

(\$/%) Acct (3) to be charged (E.g. 860603-00):

Tuition Scholarship Account

(\$/%) Acct (1) to be charged (E.g. 860603-00):

(\$/%) Acct (2) to be charged (E.g. 860603-00):

(\$/%) Acct (3) to be charged (E.g. 860603-00):

7.) Complete the Graduate Assistant Appointment Form with all the required and applicable information to the appointment. The last section of form is the Employment Action Justification. [Click here](#) for guidance if needed.

Employment Action Justification

[Click here](#) for Employment Action Justification guidelines.

<p>*Please select the SUNY criteria that justifies this position:</p> <p>--Select--</p>	<p>*SUNY criteria description</p>
<p>*Please include an explanation as to how this action specifically meets the SUNY criteria selected above?</p>	
<p>*Describe the critical need for this action, including but not limited to, the impact on the College if this action is not taken?</p>	

Note: The Employment Action Justification section is **required for all Graduate Assistant Appointment forms**.

Click Save & Submit. Then click Continue.

8.) You will be back to this screen:

Hirezon|ExChange

SUNY Oswego

Dashboard Test Oswego Notifications Help Instructions Logout

John Smith-TEST

Form ID: 59526

Graduate Assistant Appointment Form

Test Oswego

Graduate Assistant Appointment Form

Graduate Assistant Appointment Form

Discussions

Start New Discussion

Task Routing

Actions

Send for Next Action

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

10.) This is where you will setup the task routing for the appropriate approvals. Click on the pencil icon on the right:

Task Routing			
Approver Title	User	Status	Actions
Chair/Supervisor			
Dean/Director/Administrative Officer			
Graduate Studies Office	Graduate Studies	Not Initiated	
Provost/Vice President			
Payroll	Payroll Office	Not Initiated	
Finance Office	Finance Office	Not Initiated	
Human Resources	IE Forms -HR	Not Initiated	

It will drop down to this screen:

Approver Title: ?

User:

Permission: ?

Chair/Supervisor

Instructions (optional)

Save Routing

Cancel

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**. All approvers fields must have a name/department email in them.

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:

College of Business and Entrepreneurship: cobe@oswego.edu

College of Liberal Arts, Sciences and Engineering clase@oswego.edu

College of Communication, Media & the Arts: cma@oswego.edu

College of Education, Health and Human Services: educate@oswego.edu

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

Provost/Vice President: Depending on the division you are in will determine the email you enter:

Academic Affairs: provost@oswego.edu

Student Affairs: studentaffairs@oswego.edu

Alumni & Development: develop@oswego.edu

Administration & Finance: adminfinance@oswego.edu

Other areas:

Communications & Marketing: karen.crowe@oswego.edu

Office of Business and Community Relations: jill.pippin@oswego.edu

Office of Diversity & Inclusion: kendra.cadogan@oswego.edu

Institutional Research & Assessment: deborah.furlong@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.

**If an approver is the same person for multiple approver lines, they must be listed in each one and approve/deny for each approval line.*

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.

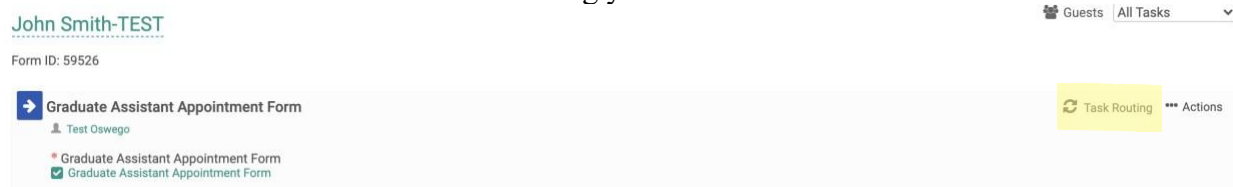
Task Routing Features

Check Status:

Both form creators and form approvers can view the task routing and check to see where the form is in the approval process at any time.

Creator Steps:

- 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.
- 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:



- 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:


- 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.
- 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:

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:

- 1.) Go back to your Dashboard screen, find the form you want to review.
- 2.) Click on the box with the pencil icon on the left of the form title under “Actions.”
- 3.) Click on  Task Routing icon in the top right of your screen.
- 4.) This will bring you to the Task Routing screen. You can view what approver the form is sitting with.
- 5.) 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.

Finance Office

 Finance Office

In Progress [05-05-2020 01:10 PM EDT]

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

Comments Box:

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:

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.

Human Resources

 Human Resources

Complete [05-01-2020 08:41 AM EDT]



Additional Approver:

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:

- d.) 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.
- e.) Once the form gets to the Finance Office, they will re-route the appointment form to the specified department/individual for approval.
- f.) 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:

Waiting for Task Approval 

☐ Show Completed

ID	Title/Name	Originator	Template	Updated
 59526	John Smith-TEST	Test Oswego	Graduate Assistant Ap	03/01/2021

1 to 1 of 1 Records Page 1

- 4.) Click on the box with pencil icon next to the form and it will bring you to this screen 

Task Approvals on John Smith-TEST

Form ID: 59526

☐ Please review the tasks below and click Approve or Deny.



Please enter comments here.

Approve

Deny

[Return to Dashboard](#)

5.) Click on **Graduate Assistant Appointment Form** and review the information on the form. When you are finished reviewing click Save & Submit then Continue. There should now be a green check mark next to the form:

* Graduate Assistant Appointment Form
☒ Graduate Assistant Appointment Form

**Note: The Chair/Supervisor, Dean/Director/Administrative Officer, Graduate Studies, 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 that already approved the form will still be able to see the 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, as well as 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.) Click on the ...Actions drop down in the top right, and click “Mark as Incomplete.”



- c.) Click on the same ...Actions drop down in the top right, and this time click “Republish.”
- d.) You will see the red comment stating to complete the tasks. Click on the **Graduate Assistant Appointment Form**.
- e.) 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.
- f.) 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.
- g.) 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.

Please allow 5 business days for processing before inquiring about the status of this request.

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 ?

	ID	Title	Originator	Template	Updated
🔍	37353	Rachel McAdams	Leah Holmes	Unclassified Service Appoi	05/01/2020
🔍	37311	Harrison Holmes	Leah Holmes	Unclassified Service Appoi	05/01/2020
🔍	37416	John Smith	Leah Holmes	Unclassified Service Appoi	04/30/2020
🔍	37761	Michael Jordan	Leah Holmes	Unclassified Service Appoi	04/30/2020
🔍	37352	Emma Stone	Leah Holmes	Unclassified Service Appoi	04/27/2020

1 to 5 of 7 Records Page 1

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

OSWEGO
STATE UNIVERSITY OF NEW YORK
John Smith-TEST

Form ID: 59526
Template: Graduate Assistant Appointment Form
Department: Human Resources
Originator: Test Oswego
Created: 03-01-2021 01:07 PM EST
Completed: 03-01-2021 01:22 PM EST

✓ Graduate Assistant Appointment Form
Completed: 03-01-2021 01:22 PM EST [Test Oswego]
* Graduate Assistant Appointment Form
✓ Graduate Assistant Appointment Form
Task Routing

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:

- Login to your Interview Exchange account and go to your Dashboard.
- 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:


Waiting for Task Approval ? ☐ Show Completed

ID	Title/Name	Originator	Template	Updated
----	------------	------------	----------	---------


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:


Completed Task Approval

☒ Show Completed

ID	Title/Name	Originator	Template	Updated
 59526	John Smith-TEST	Test Oswego	Graduate Assistant Ap	03/01/2021


- 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:

View 



John Smith-TEST

Form ID: 59526
 Template: Graduate Assistant Appointment Form
 Department: Human Resources
 Originator: Test Oswego
 Created: 03-01-2021 01:07 PM EST
 Completed: 03-01-2021 01:22 PM EST

 Graduate Assistant Appointment Form

Completed: 03-01-2021 01:22 PM EST [Test Oswego]

* Graduate Assistant Appointment Form

☒ Graduate Assistant Appointment Form

Task Routing

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

EForm



Graduate Assistant Appointment Form

Employee Information

First Name: (Required)

Last Name: (Required)

Revised:

Check this box when you are submitting a revised form.

Home Address: (Required)

City: (Required)

State: (Required)

Zip: (Required)

Campus Building: (Required)

Banner # (if applicable):

Appointment Information

Choose Appointment Request: (Required)¹

If other changed selected, please specify in the box below:

Employment Type:²

Appointment Type:³

Work Obligation: (Required)⁴

If other is selected, please specify in the box below:

Line # (if applicable):

hrs/week (Required):

Stipend:

GA Tuition Scholarship
(if applicable):

Effective Begin Date:

Effective End Date:

Department: (Required)

This field will auto populate based on the department you choose when you started the form.

Supervisor: (Required)

Previous individual in this position:

Comments:

Any additional comments can be added here.

¹ There are three options to choose from: New Hire, Renewal, Other

² Hard Coded: Graduate Assistant

³ Hard-Coded: Temporary

⁴ There are three options to choose from: Academic, Semester, Other

Account Information

Stipend Account

%/ \$: _____
%/ \$: _____
%/ \$: _____

Acct. to be charged: _____
Acct. to be charged: _____
Acct. to be charged: _____

Tuition Scholarship Account

%/ \$: _____
%/ \$: _____
%/ \$: _____

Acct. to be charged: _____
Acct. to be charged: _____
Acct. to be charged: _____

*Note: You can 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.*

Employment Action Justification

The Employment Action Justification section is **required for all employment actions.*

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?