How to Guide:

Phased Retirement Program Application for Faculty and Professional Employees

Interview Exchange
Electronic Forms Module

May 2023

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Login to Interview Exchange

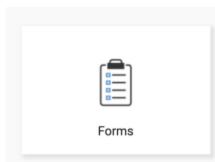
1.) Click here to sign into Hirezon/Interview Exchange using single sign on. If you do use the old link it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).

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 continue to login the same way you currently do using the old 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:



Note: If you need access to the forms module, contact the Office of Human Resources at hr@oswego.edu.

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.

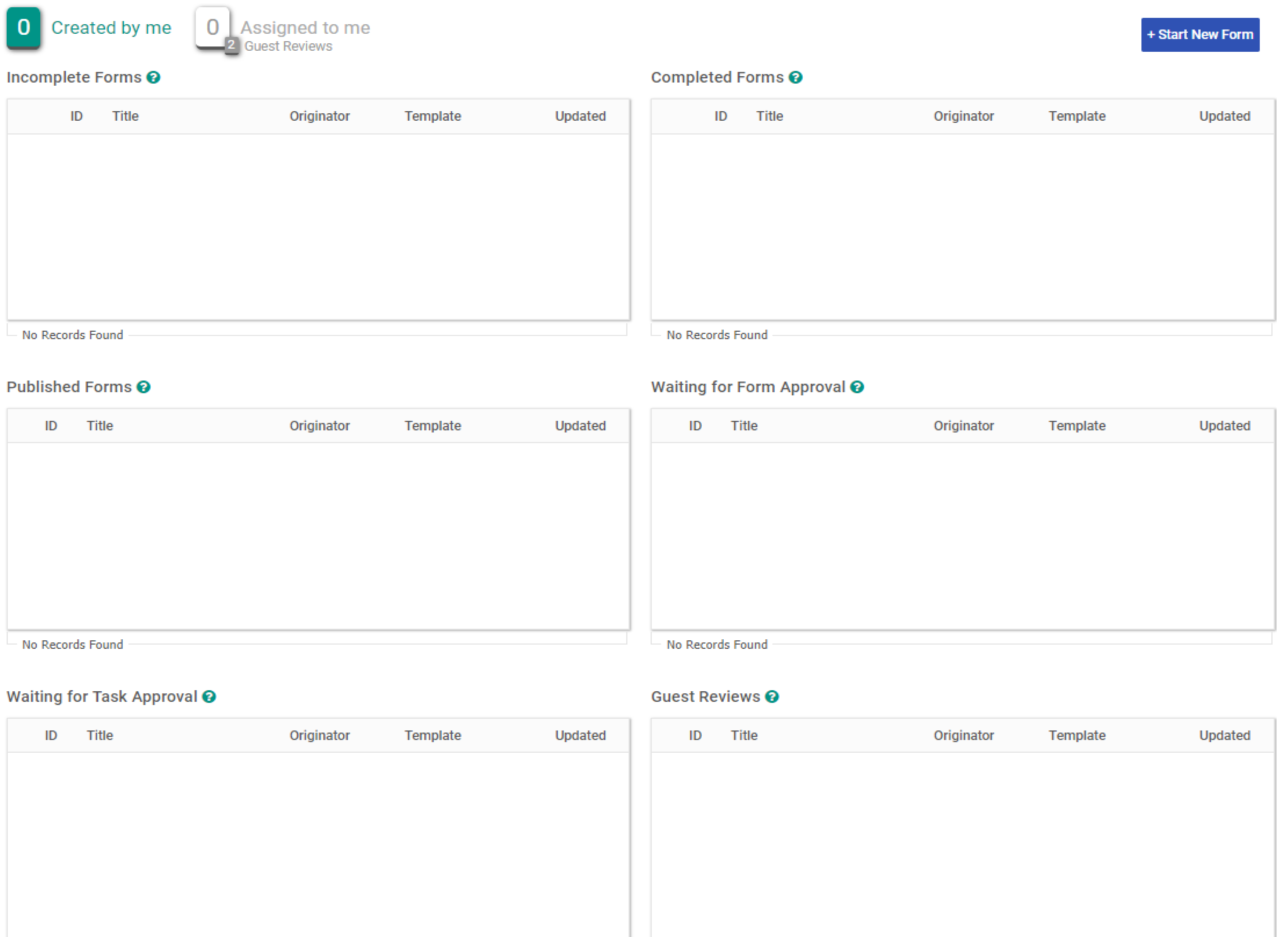
Completed Forms: Forms created by you which are now completed.

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

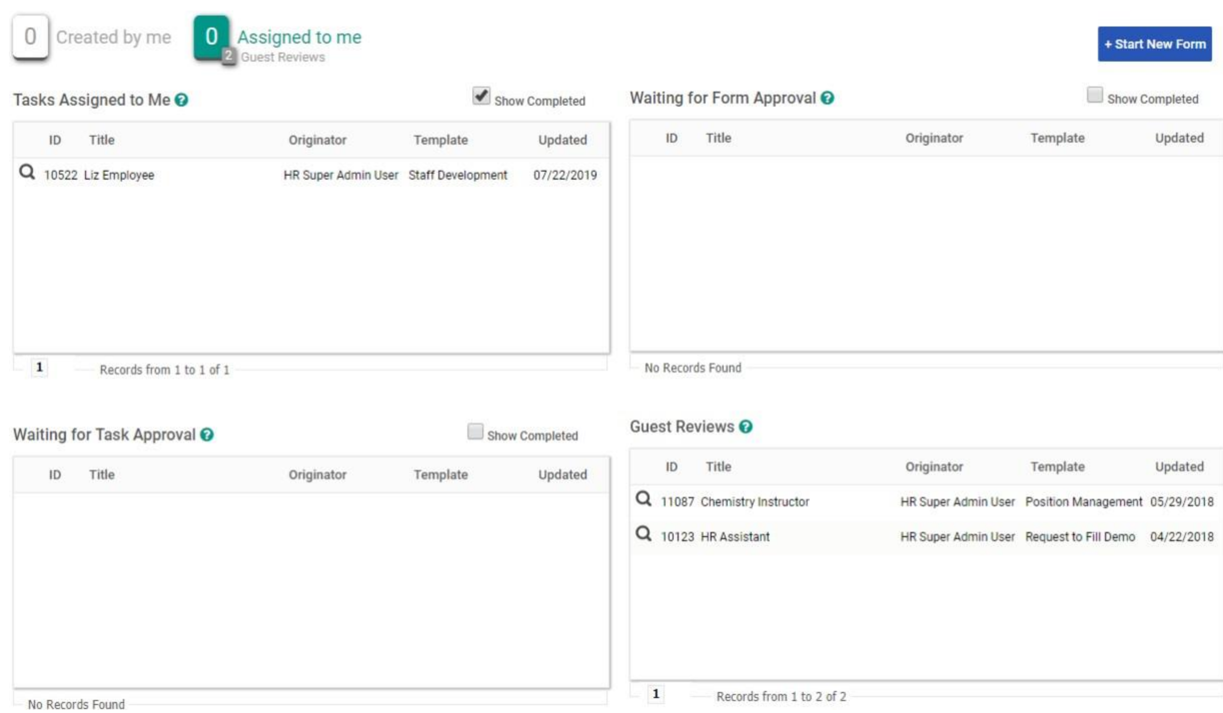
Task Assigned to Me: Forms created by other users and tasks assigned to you for completion.

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.

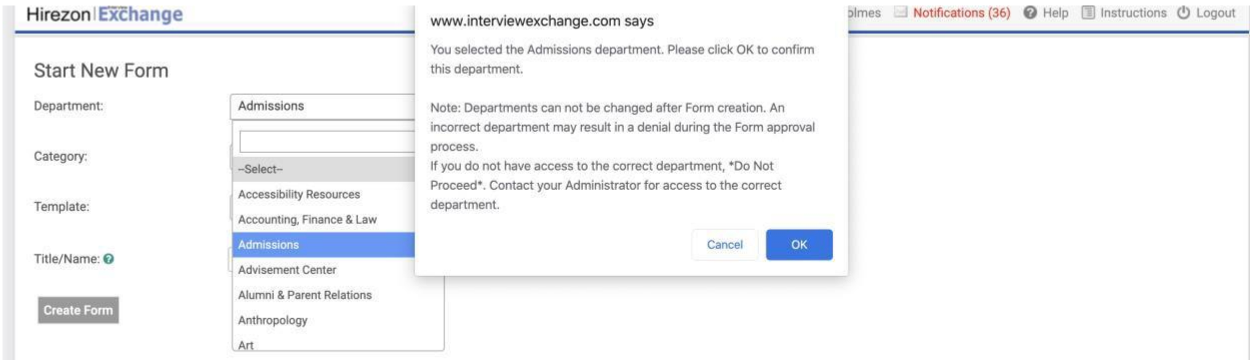


How to Start Form

+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 you work for



Note: If you need access, please contact the Office Human Resources at hr@oswego.edu.

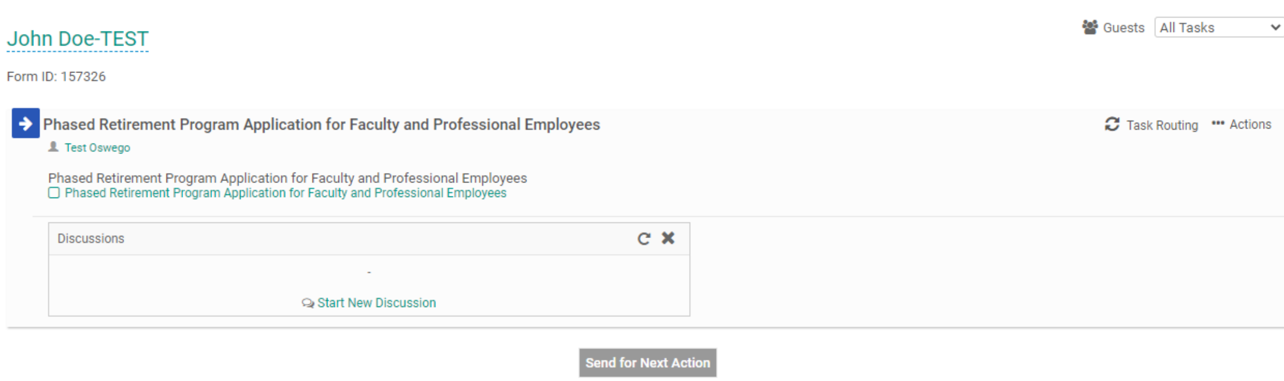
2.) Select the category: Personnel Records

3.) Select the template: Phased Retirement Program Application for Faculty and Professional Employees

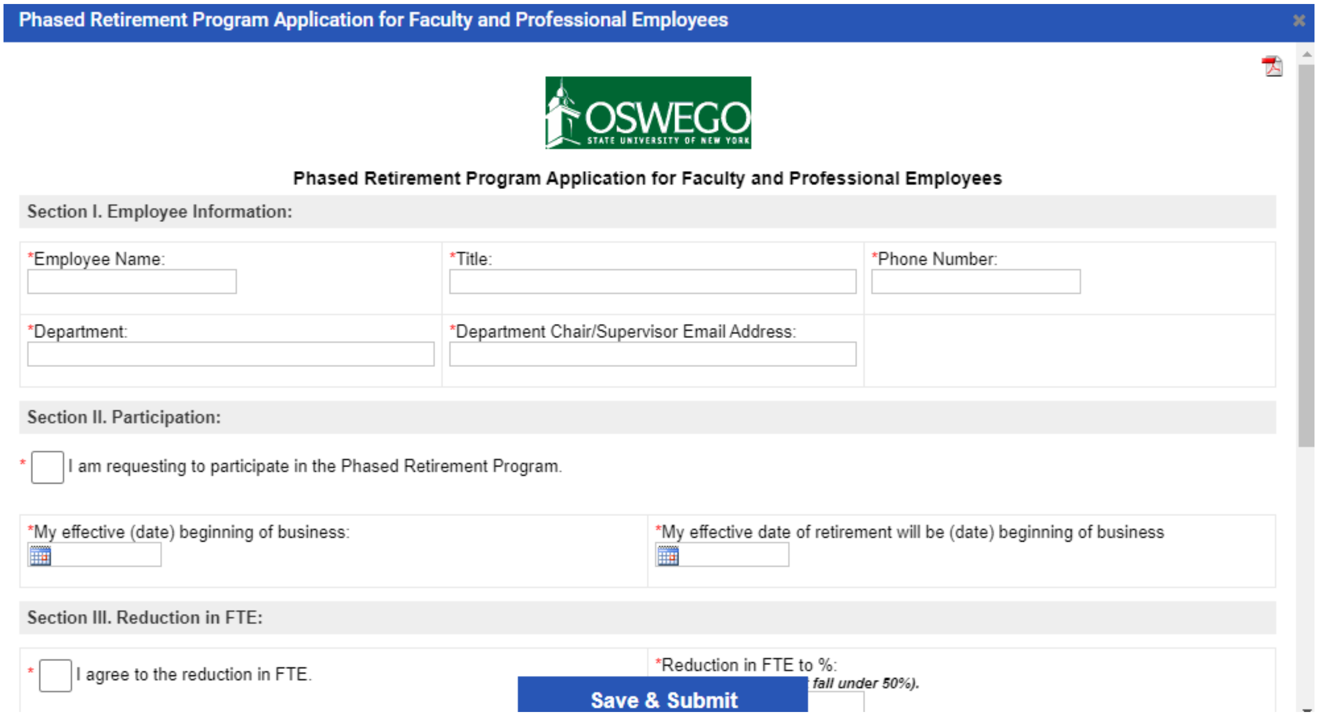
4.) Enter Your Name

Note: This section does say Title/Name- do not enter your title- please enter your name. This will allow for easy recognition when going through the approval process.

5.) Click: Create Form
This will be the next screen:

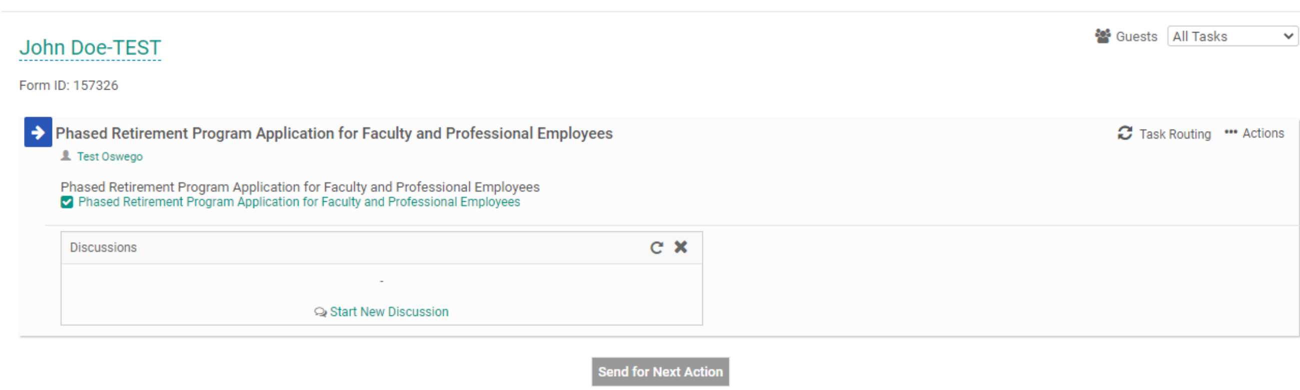


6.) Click: Phased Retirement Program Application for Faculty and Professional Employees- it will bring you to this screen:

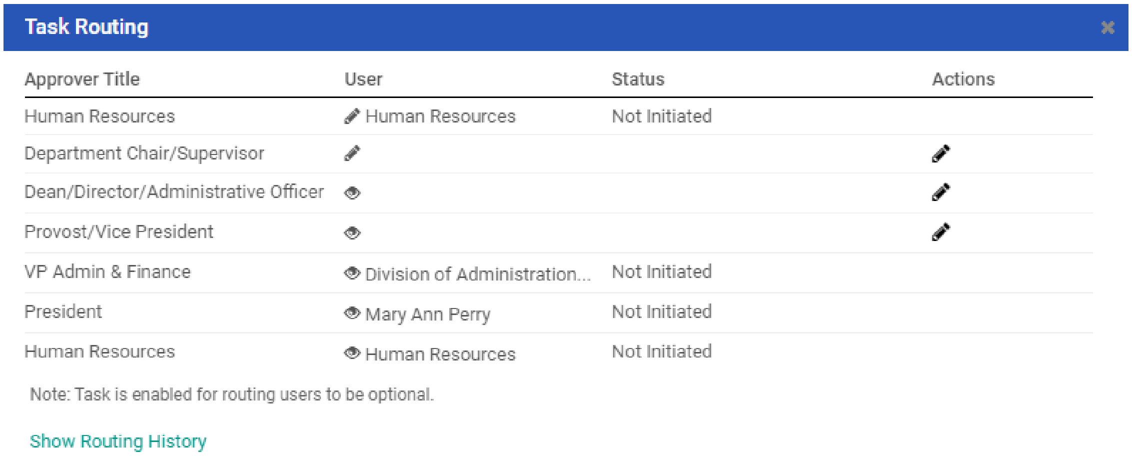


7.) Complete the Phased Retirement Program Application for Faculty and Professional Employees form with all the required and applicable information. Click Save & Submit. Then click Continue.

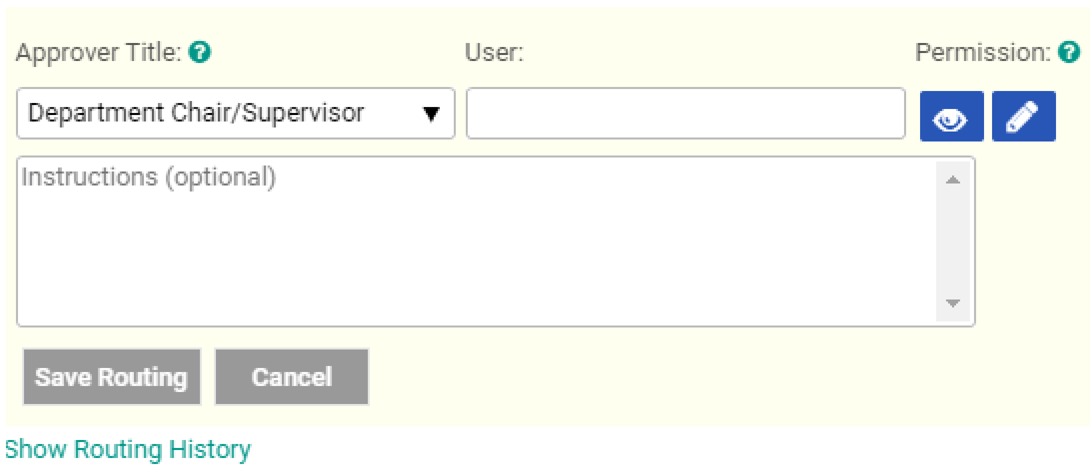
8.) You will be back to this screen:



9.) Click on the "Task Routing" in the top right corner. Task Routing This is where you will setup the task routing for the appropriate approvals.



Click on the pencil icon on the right under actions- 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

Human Resources: The Office of Human Resources is hard-coded into the task routing so you do not need to enter anything.

Department 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: 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
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: studentaffairs@oswego.edu
Alumni & Development: develop@oswego.edu
Administration & Finance: adminfinance@oswego.edu

Other areas:

Communications & Marketing: wayne.westervelt@oswego.edu
Office of Diversity & Inclusion: kendra.cadogan@oswego.edu
Institutional Research & Assessment: deborah.furlong@oswego.edu

VP of Administration & Finance: The VP of Admin & Finance email is hard-coded into the task routing so you do not need to enter anything.

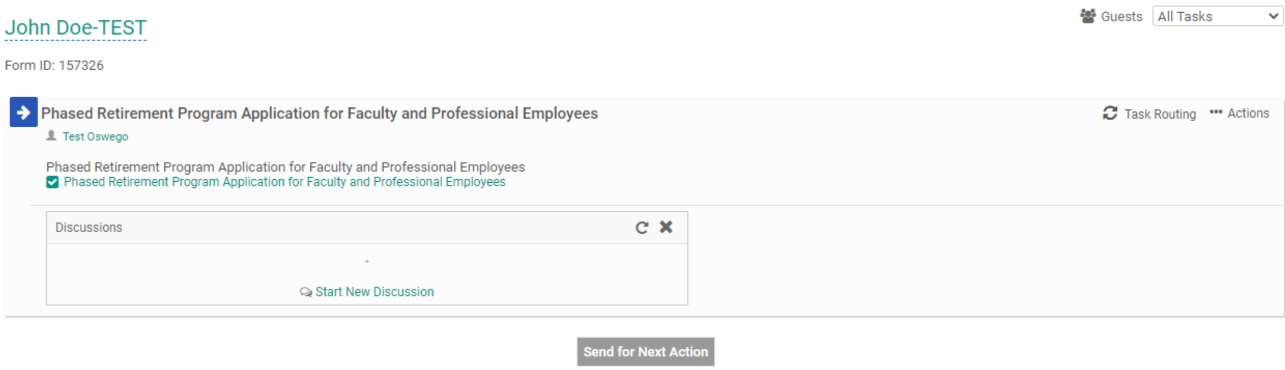
President: The President's Office email is hard-coded into the task routing so you do not need to enter anything.

Human Resources: The Office of Human Resources 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.*

10.) 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

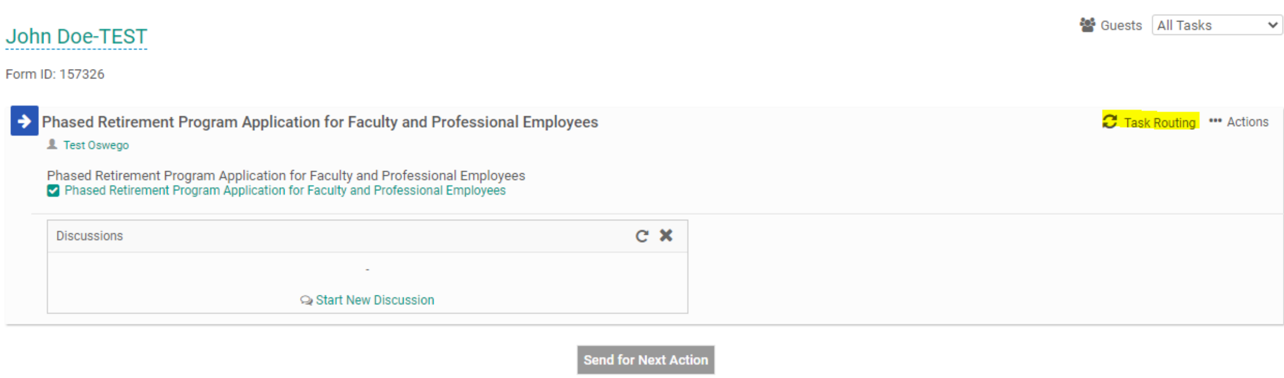
Check Status:

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.

<u>Approver</u> Steps:

a.) Go back to your Dashboard screen, click on the Show Completed box in the <u>Waiting for Task Approval</u> section. Once you click on that box, the section will be renamed to <u>Completed Task Approval</u> 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 the approvers, the date and time the form was approved and what approver the form is sitting with.

Friendly Reminder:

1.) 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.

<u>Steps</u>:

a.) Go back to your Dashboard screen, find the form you want to review within the <u>Waiting for Task Approval</u> 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 <u>absolutely</u> necessary.*

Comments Box:

1.) 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:

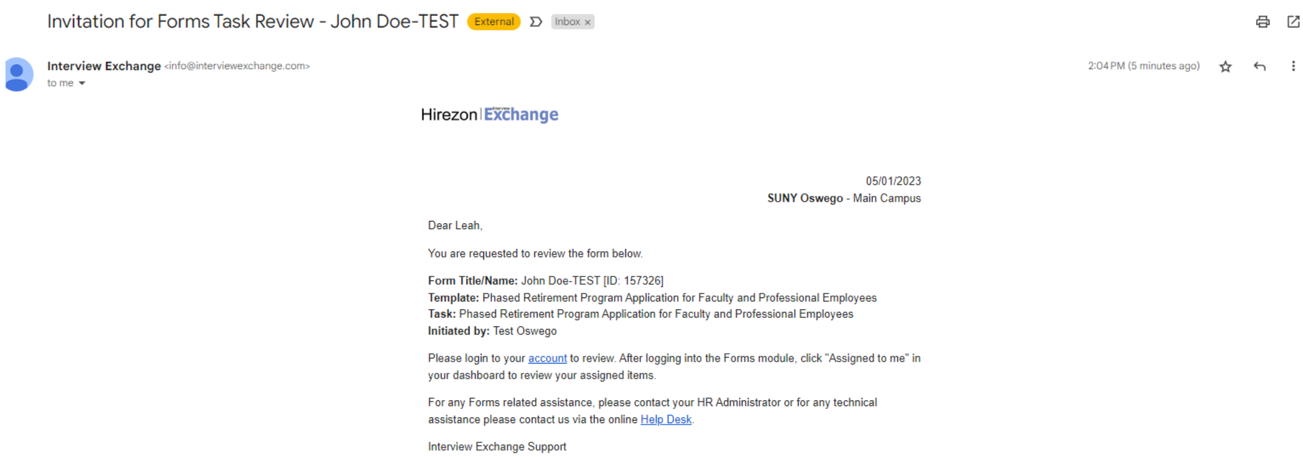
1.) If a change was made to a form the creator can see what the change was within the task routing. If you click on the box with the pencil next to the form, then click on "Tasking Routing" in the top right corner. It will bring you to the task routing screen and you will see a clock with an arrow around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

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:


Invitation for Forms Task Review - John Doe-TEST External Inbox ×

Interview Exchange <info@interviewexchange.com>
to me
2:04 PM (5 minutes ago)

Hirezon | Exchange

05/01/2023
SUNY Oswego - Main Campus

Dear Leah,

You are requested to review the form below.

Form Title/Name: John Doe-TEST [ID: 157326]
Template: Phased Retirement Program Application for Faculty and Professional Employees
Task: Phased Retirement Program Application for Faculty and Professional Employees
Initiated by: Test Oswego

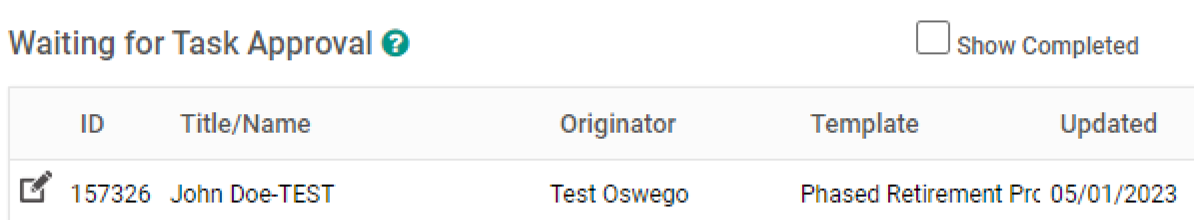
Please login to your account to review. After logging into the Forms module, click "Assigned to me" in your dashboard to review your assigned items.

For any Forms related assistance, please contact your HR Administrator or for any technical assistance please contact us via the online Help Desk.

Interview Exchange Support

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

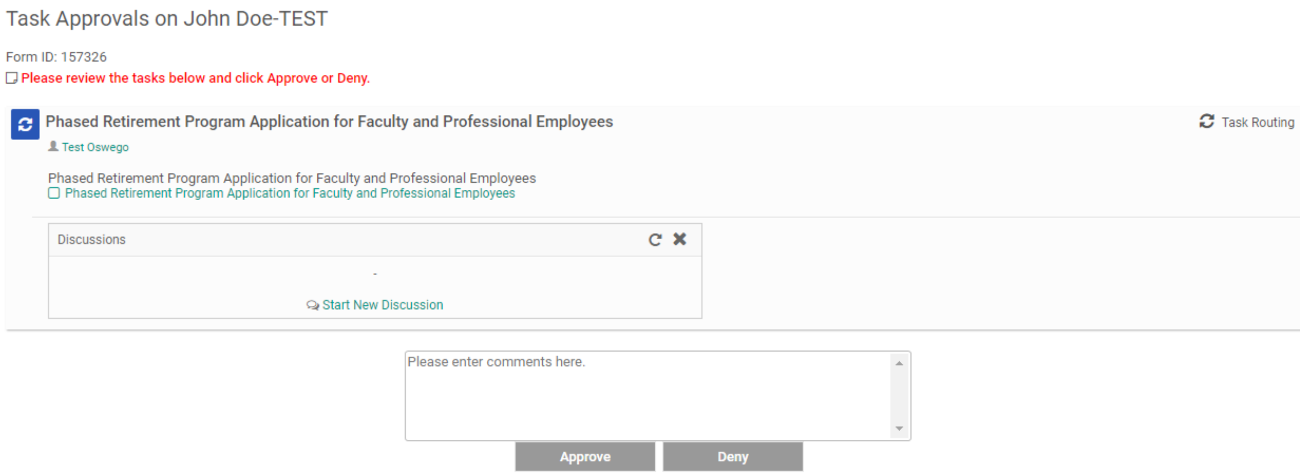
3.) The forms that are requiring your review and approval/denial will be in the section titled *Waiting for Task Approval:*


Waiting for Task Approval

Show Completed

ID	Title/Name	Originator	Template	Updated
157326	John Doe-TEST	Test Oswego	Phased Retirement Prc	05/01/2023

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



4.) Click on Phased Retirement Program Application for Faculty and Professional Employees and review the information on the form. When you are finished reviewing click Save & Submit at the bottom. Then Continue.

5.) 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 application.*

6.) 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.

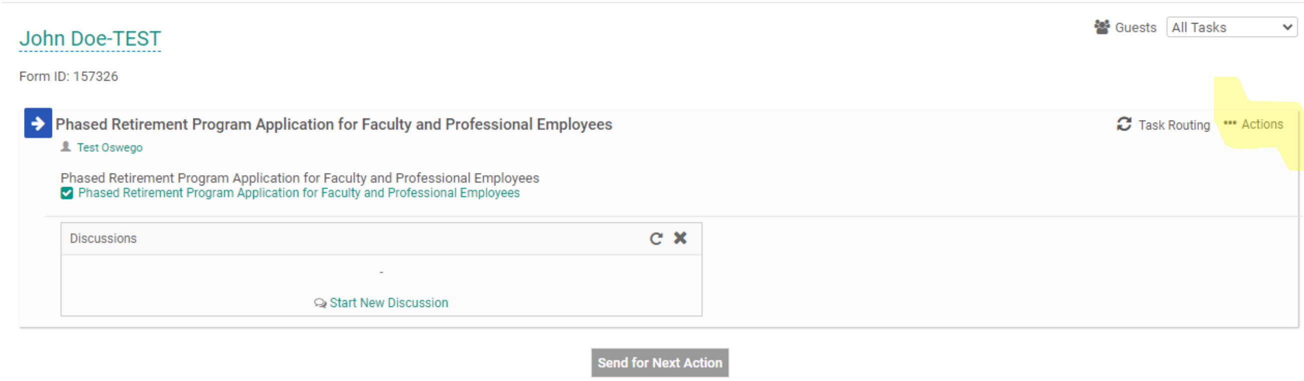
3.) If a form is denied, only the creator will receive an email letting them know the form was denied. Anyone within the approval task routing process will still be able to see this form within their dashboard and if they click on the magnifying glass to view- they will see a big red X in the top left 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 Phased Retirement Program Application for Faculty and Professional Employees.

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.

Note: If you resubmit a denied form- be sure to click the Revised box in the top right corner of the form.

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.

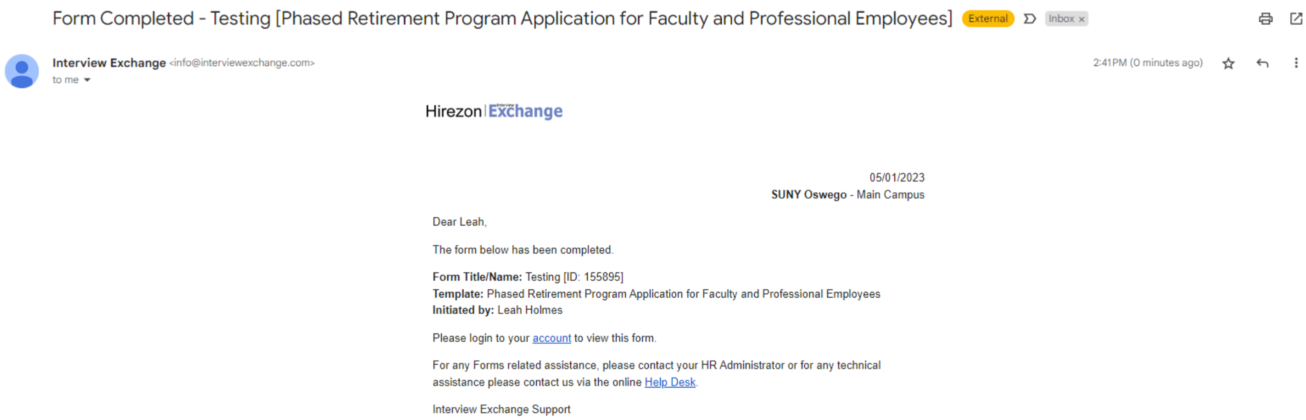
Completed Forms

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 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:


Form Completed - Testing [Phased Retirement Program Application for Faculty and Professional Employees] External Inbox ×

Interview Exchange <info@interviewexchange.com>
to me
2:41 PM (0 minutes ago)

Hirezon | Exchange

05/01/2023
SUNY Oswego - Main Campus

Dear Leah,

The form below has been completed.

Form Title/Name: Testing [ID: 155895]
Template: Phased Retirement Program Application for Faculty and Professional Employees
Initiated by: Leah Holmes

Please login to your account to view this form.

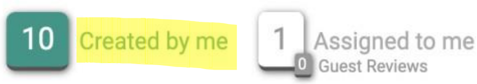
For any Forms related assistance, please contact your HR Administrator or for any technical assistance please contact us via the online Help Desk.

Interview Exchange Support

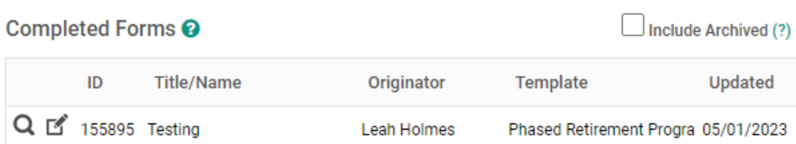
To find the completed forms:

Steps:

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



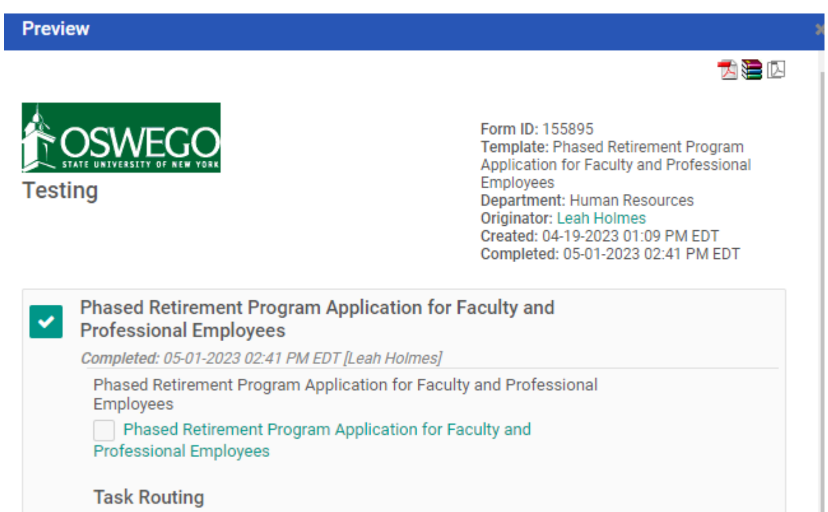
c.) Then look in the *Completed Forms* section in the top right of your screen:


Completed Forms

Include Archived (?)

	ID	Title/Name	Originator	Template	Updated
	155895	Testing	Leah Holmes	Phased Retirement Progra	05/01/2023

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:



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

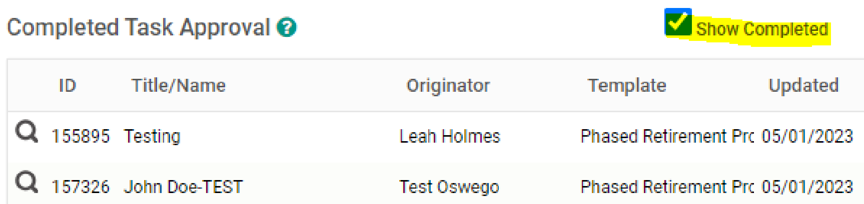
If you were an *approver* of the form:

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:


Completed Task Approval

Show Completed

ID	Title/Name	Originator	Template	Updated
155895	Testing	Leah Holmes	Phased Retirement Prc	05/01/2023
157326	John Doe-TEST	Test Oswego	Phased Retirement Prc	05/01/2023

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 Phased Retirement Program Application for Faculty and Professional Employees. You have the option to download into a PDF in the top right corner so you can print or save each completed/approved application.