



How to Guide:

# **PHASED RETIREMENT PROGRAM APPLICATION FOR FACULTY AND PROFESSIONAL EMPLOYEES**

Interview Exchange  
Electronic Forms Module



## Table of Contents

Login to Interview Exchange.....	3
User Dashboard .....	3
How to Start Form .....	5
Approver Title Email Guidance .....	9
Task Routing Features .....	10
Check Status:.....	10
Friendly Reminder:.....	11
Comments Box:.....	11
See Changes Made to Form: .....	12
How to Review/Approve Form.....	12
Denied Form Process .....	13
Completed Forms.....	14

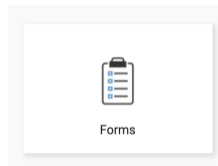
## Login to Interview Exchange

- 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:



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

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.

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

**Waiting for 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 you work for

**Hirezon|Exchange**

**Start New Form**

Department: Admissions

Category: --Select--

Template: Accessibility Resources

Title/Name: Accounting, Finance & Law

**Create Form**

**www.interviewexchange.com says**

You selected the Admissions department. Please click OK to confirm this department.

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.

**Cancel** **OK**

*Note: If you need access, please contact the Office Human Resources at [hr@oswego.edu](mailto: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:

**John Doe-TEST**

Form ID: 157326

**Phased Retirement Program Application for Faculty and Professional Employees**

Test Oswego

Phased Retirement Program Application for Faculty and Professional Employees

Phased Retirement Program Application for Faculty and Professional Employees

Discussions

[Start New Discussion](#)

**Send for Next Action**

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

The screenshot shows a web form titled "Phased Retirement Program Application for Faculty and Professional Employees" with the Oswego State University of New York logo. The form is divided into three sections:

- Section I. Employee Information:** Contains fields for Employee Name, Title, Phone Number, Department, and Department Chair/Supervisor Email Address.
- Section II. Participation:** Includes a checkbox for "I am requesting to participate in the Phased Retirement Program." and two date pickers for "My effective (date) beginning of business" and "My effective date of retirement will be (date) beginning of business".
- Section III. Reduction in FTE:** Includes a checkbox for "I agree to the reduction in FTE." and a field for "Reduction in FTE to %:" with a note "fall under 50%".

A blue "Save & Submit" button is located at the bottom right of the form.

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:

The screenshot shows a task routing interface. At the top, it displays the user "John Doe-TEST" and the form ID "157326". The main task is "Phased Retirement Program Application for Faculty and Professional Employees" by "Test Oswego". Below the task name, there is a list of tasks, with "Phased Retirement Program Application for Faculty and Professional Employees" checked. A "Discussions" section is visible with a "Start New Discussion" link. At the bottom, there is a "Send for Next Action" button.

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.

Task Routing <span>✕</span>			
Approver Title	User	Status	Actions
Human Resources	Human Resources	Not Initiated	
Department Chair/Supervisor			
Dean/Director/Administrative Officer			
Provost/Vice President			
VP Admin & Finance	Division of Administration...	Not Initiated	
President	Mary Ann Perry	Not Initiated	
Human Resources	Human Resources	Not Initiated	

Note: Task is enabled for routing users to be optional.

[Show Routing History](#)

Click on the pencil icon on the right under actions- it will drop down to this screen:

Approver Title: 

Department Chair/Supervisor ▼

User:

Permission:

Instructions (optional)

Save Routing

Cancel

[Show Routing History](#)

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:

College of Business and Entrepreneurship: [cobe@oswego.edu](mailto:cobe@oswego.edu)

College of Liberal Arts, Sciences and Engineering [clase@oswego.edu](mailto:clase@oswego.edu)

College of Communication, Media & the Arts: [cma@oswego.edu](mailto:cma@oswego.edu)

College of Education, Health and Human Services: [educate@oswego.edu](mailto: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](mailto:provost@oswego.edu)

Student Affairs: [studentaffairs@oswego.edu](mailto:studentaffairs@oswego.edu)

Alumni & Development: [develop@oswego.edu](mailto:develop@oswego.edu)

Administration & Finance: [adminfinance@oswego.edu](mailto:adminfinance@oswego.edu)

*Other areas:*

Communications & Marketing: [karen.crowe@oswego.edu](mailto:karen.crowe@oswego.edu)

Office of Business and Community Relations: [jill.pippin@oswego.edu](mailto:jill.pippin@oswego.edu)

Office of Diversity & Inclusion: [kendra.cadogan@oswego.edu](mailto:kendra.cadogan@oswego.edu)

Institutional Research & Assessment: [deborah.furlong@oswego.edu](mailto: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:

The screenshot shows a web interface for a form titled "Phased Retirement Program Application for Faculty and Professional Employees". At the top left, it says "John Doe-TEST" and "Form ID: 157326". At the top right, there are tabs for "Guests" and "All Tasks". Below the title, there is a section for "Discussions" with a "Start New Discussion" link. At the bottom, there is a button labeled "Send for Next Action".

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:

This screenshot is identical to the one above, but the "Task Routing" button in the top right corner is highlighted in yellow, indicating it is the next step in the process.

- 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 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 within the Waiting for Task Approval section.
- 2.) Click on the box with the pencil icon on the left of the form title.
- 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.



*\*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.

*\*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]

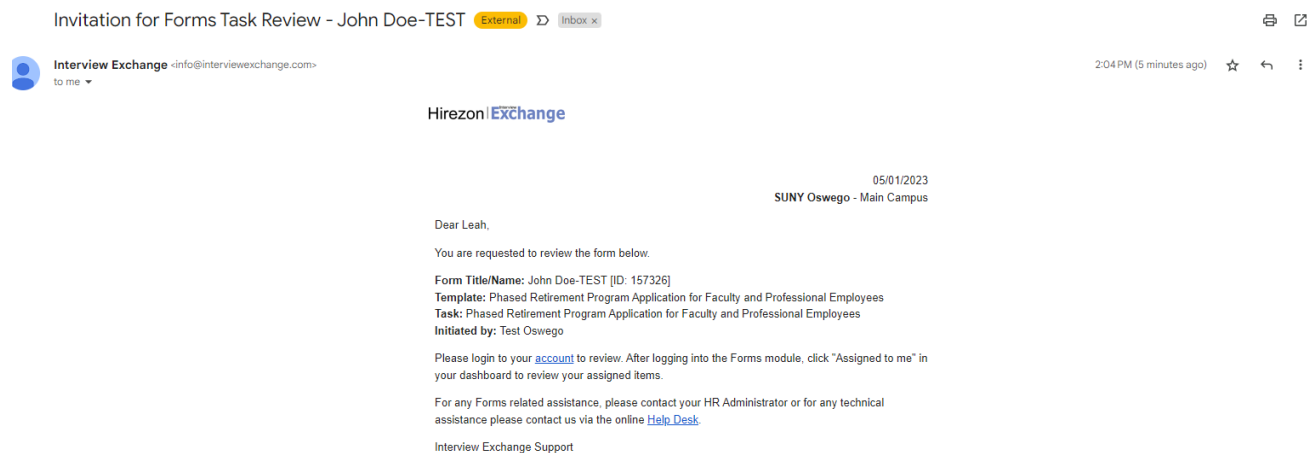


## How to Review/Approve Form

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 ?				<input type="checkbox"/> 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:



Task Approvals on John Doe-TEST

Form ID: 157326

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

Phased Retirement Program Application for Faculty and Professional Employees

Test Oswego

Phased Retirement Program Application for Faculty and Professional Employees

Phased Retirement Program Application for Faculty and Professional Employees

Discussions

Start New Discussion

Please enter comments here.

Approve Deny

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.

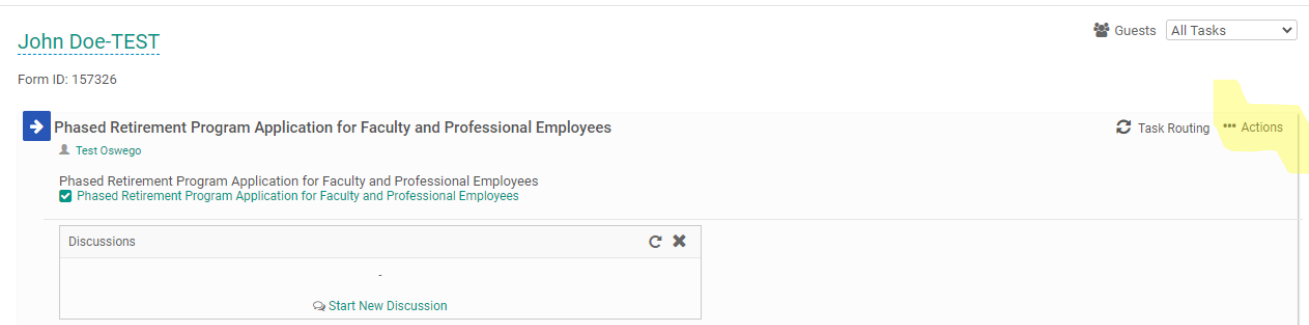
2.) That approver will have to put in a comment before submitting. If it is something that can be edited on the form, please indicate in the comments box so the creator can edit and resubmit the form.

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 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.) It will bring you to this screen:



Send for Next Action

- 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:



To find the completed forms:

Steps:

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



- 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

- 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:



Testing

Form ID: 155895  
Template: Phased Retirement Program  
Application for Faculty and Professional  
Employees  
Department: Human Resources  
Originator: [Leah Holmes](#)  
Created: 04-19-2023 01:09 PM EDT  
Completed: 05-01-2023 02:41 PM EDT



**Phased Retirement Program Application for Faculty and Professional Employees**

*Completed: 05-01-2023 02:41 PM EDT [Leah Holmes]*

Phased Retirement Program Application for Faculty and Professional Employees

☐ [Phased Retirement Program Application for Faculty and Professional Employees](#)

**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 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 ?

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.