



How to Guide:

REASSIGNMENT/ EXTRA SERVICE REQUEST

Interview Exchange
Electronic Forms Module



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Login to Interview Exchange

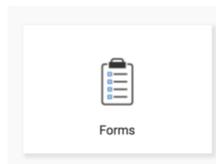
1.) [Click here](#) to sign into Hirezon/Interview Exchange using single sign on. If you do use the [old link](#) it will still direct you to the single sign on screen once you put in your long email address (first.lastname@oswego.edu).

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:



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
No Records Found				

Guest Reviews

ID	Title	Originator	Template	Updated
No Records Found				

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:

Category:

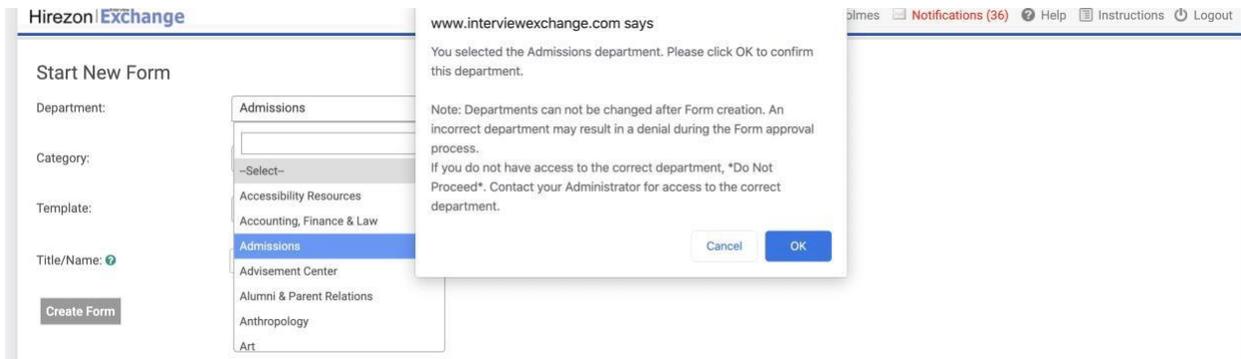
Template:

Title/Name: ?

Create Form

Steps:

1.) Select the department this employee works for.



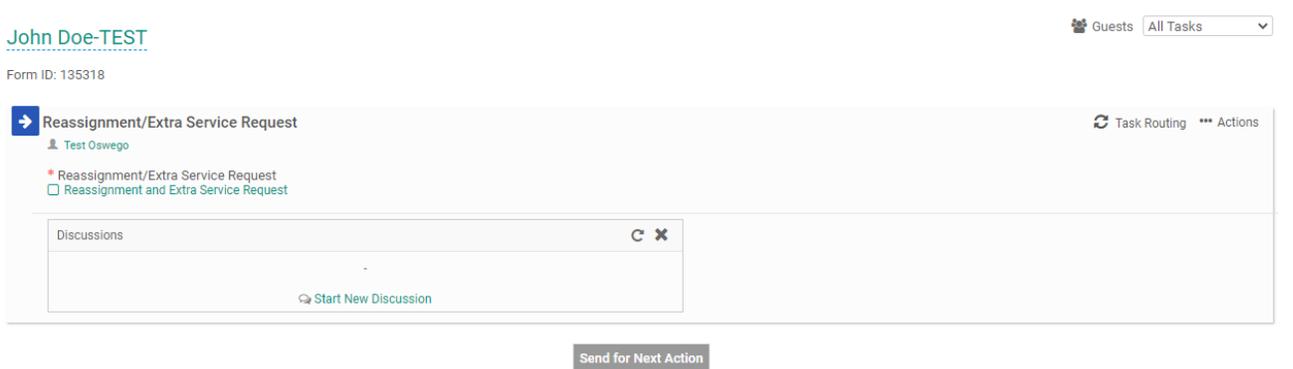
Note: This should be the department the creator of this form also works in. Each user (creator of form) only has access to the department they currently work in or will need to request access to another department (if applicable) by contacting the Human Resources Office at hr@oswego.edu.

- 2.) Select the category: 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.

Click: **Create Form**

This will be the next screen:



6.) Click: **Reassignment and Extra Service Request**- it will bring you to this screen:

Reassignment and Extra Service Request



Reassignment and Extra Service Request

*Name: John Doe-TEST	*Department: Accessibility Resources	<input type="checkbox"/> Revised
*Division: --Select--	If Acad Aff, Select School/Unit: --Select--	If Other, specify:

Reassignment from Teaching Request

*How many credits of teaching are being reassigned? 	
*How will the credits be covered? --Select--	If Other, specify:
Funding Account Number # 	Is this an ongoing/multi-semester reassignment? --Select--

Extra Service Compensation Request

*Category Indicator: Select	Save & Submit
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7.) Complete the Reassignment and Extra Service Request form with all 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.

Reassignment and Extra Service Request

Employment Action Justification

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

*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?

*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 (s Save & Submit ve on your unit:
--

Note: There are two sections within this form- Reassignment from Teaching Request and Extra Service Compensation Request. If one section is not applicable, in any of the required fields please insert NA or in the drop down select Other and “skip” over that section.

8.) You will be back to this screen:

John Doe-TEST Guests All Tasks

Form ID: 135318

Reassignment/Extra Service Request Task Routing Actions

Test Oswego

* Reassignment/Extra Service Request
 Reassignment and Extra Service Request

Discussions Close

[Start New Discussion](#)

Send for Next Action

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:

Task Routing Close			
Approver Title	User	Status	Actions
Chair/Supervisor			
Department Head/Dean			
Provost/Vice President			
Finance Office	Finance Office	Not Initiated	
VP of Admin & Finance	Division of Administration...	Not Initiated	
	Angela M Galvin	Not Initiated	
Payroll Office	Payroll Office	Not Initiated	

It will drop down to this screen:

Approver Title: User: Permission:

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 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

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

Department Head/Dean: 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

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

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.

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.

**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 user interface for a task titled "Reassignment/Extra Service Request" with a sub-task "Test Oswego". The user is identified as "John Doe-TEST" and the form ID is "135318". The interface includes a "Task Routing" button and an "Actions" menu. Below the task title, there are two options: "Reassignment/Extra Service Request" (selected with a red asterisk) and "Reassignment and Extra Service Request" (unselected). A "Discussions" section is visible with a "Start New Discussion" button. At the bottom, there is a "Send for Next Action" button.

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:

This screenshot is identical to the one above, but with a yellow highlight around the "Task Routing" button in the top right corner of the task card.

- 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.

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:

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.

Human Resources

 Human Resources

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



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:

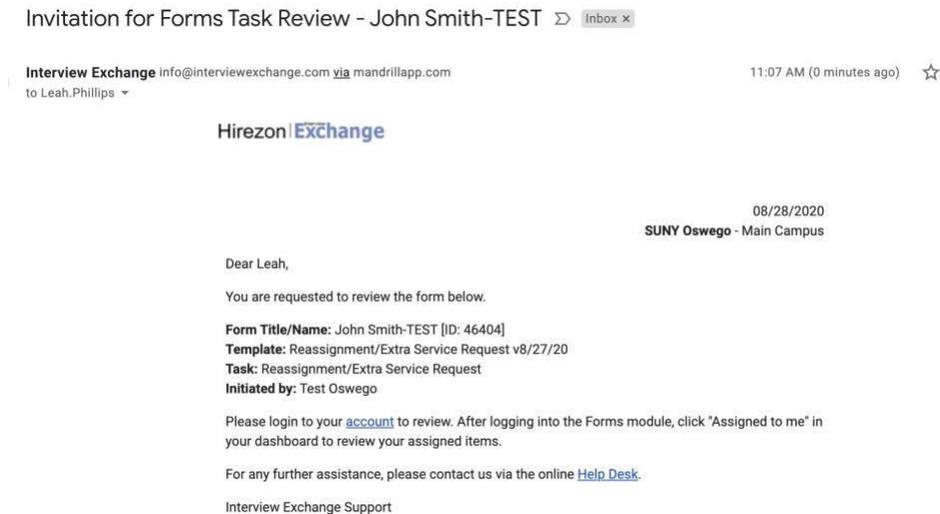
- a.) The creator of the form should indicate in the comments box when initially sending the Reassignment/Extra Service form that such "department/individual" must be an additional approver.
- b.) Once the form gets to the Finance Office, they will re-route the Reassignment/Extra Service form to the 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:

Waiting for Task Approval ? Show Completed

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

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

John Doe-TEST

Guests All Tasks

Form ID: 135318

→ Reassignment/Extra Service Request

Test Oswego

* Reassignment/Extra Service Request

Reassignment and Extra Service Request

Discussions

Start New Discussion

Send for Next Action

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:

The screenshot shows a web interface for a form titled "Reassignment/Extra Service Request". At the top left, the user is identified as "John Doe-TEST" and the form ID is "135318". The form is currently in a "Task Routing" state. A "Discussions" box is visible at the bottom, with a "Start New Discussion" button. A "Send for Next Action" button is highlighted in the bottom right corner.

- 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.

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 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:

Form Completed - John Smith-TEST [Reassignment/Extra Service Request v8/27/20] Inbox x

Interview Exchange info@interviewexchange.com via mandrillapp.com
to me ▾

Hirezon | Exchange

08/28/2020
SUNY Oswego - Main Campus

Dear Test,

The form below has been completed.

Form Title/Name: John Smith-TEST [ID: 46404]

Template: Reassignment/Extra Service Request v8/27/20

Initiated by: Test Oswego

Please login to your [account](#) to invite any guest for review.

For any further 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 ?

ID	Title	Originator	Template	Updated
46404	John Smith-TEST	Test Oswego	Reassignment/Extra Servi	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:

Preview



John Smith-TEST

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

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:

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



- 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	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:

View 


John Smith-TEST

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

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](#)

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.