How to Guide:

Unclassified Service Appointment Form

Interview Exchange
Electronic Forms Module

Updated: August 2025

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Login to Interview Exchange

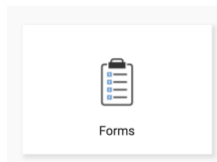
1.) Click here to sign into Hirezon/Interview Exchange using single sign on.

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.

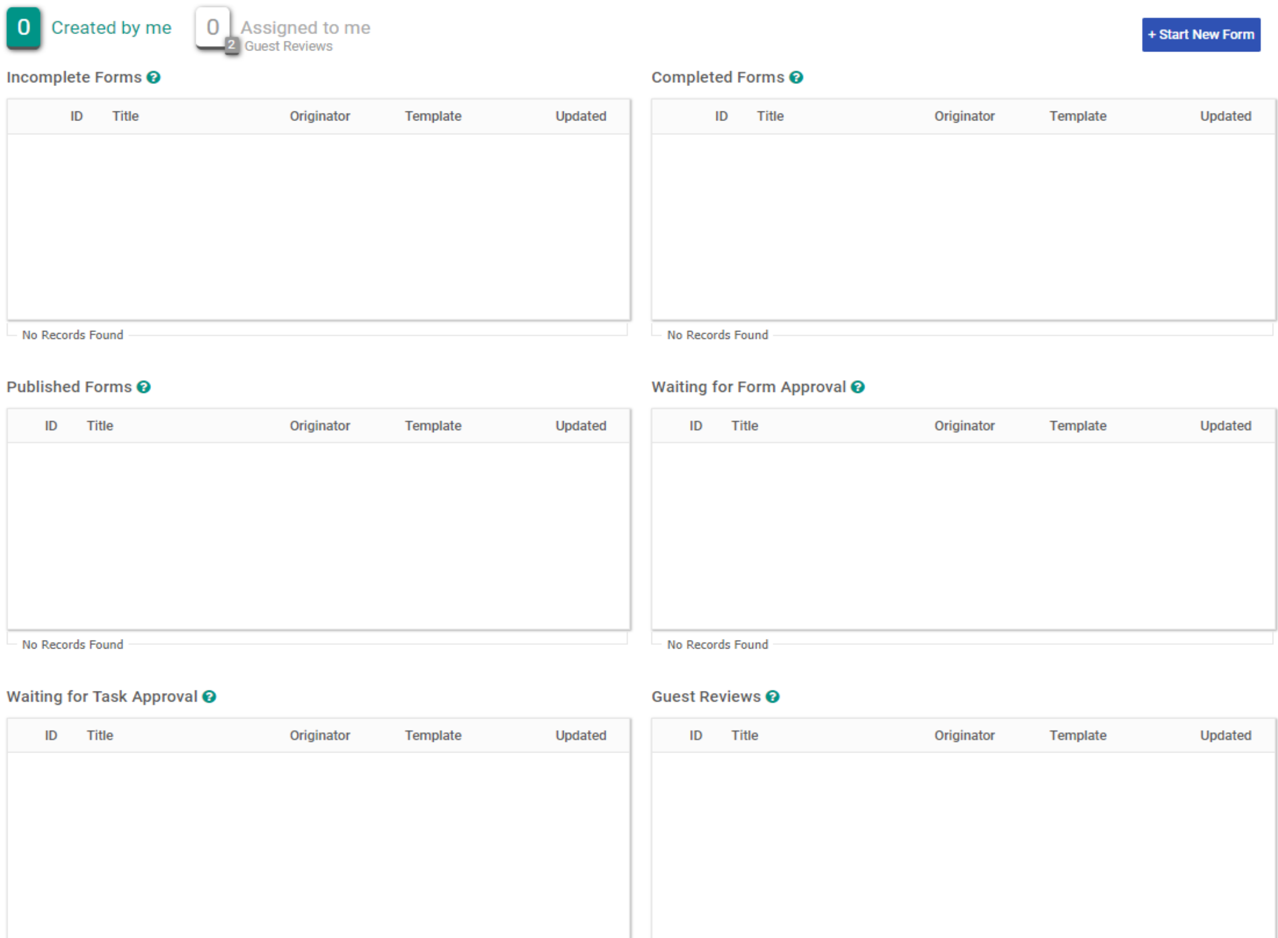
Completed Forms: Forms created by you which are now completed.

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.



Tab: Assigned to me

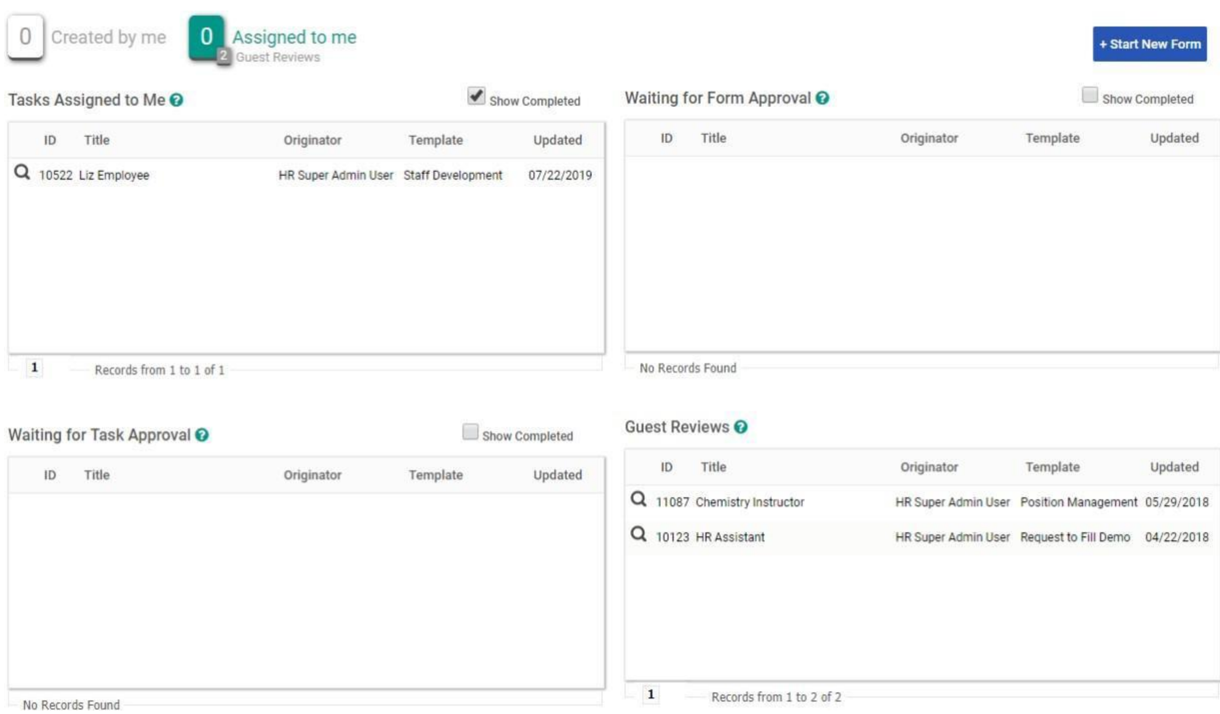
Tasks Assigned to Me: Forms created by other users and tasks assigned to you for completion.

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.

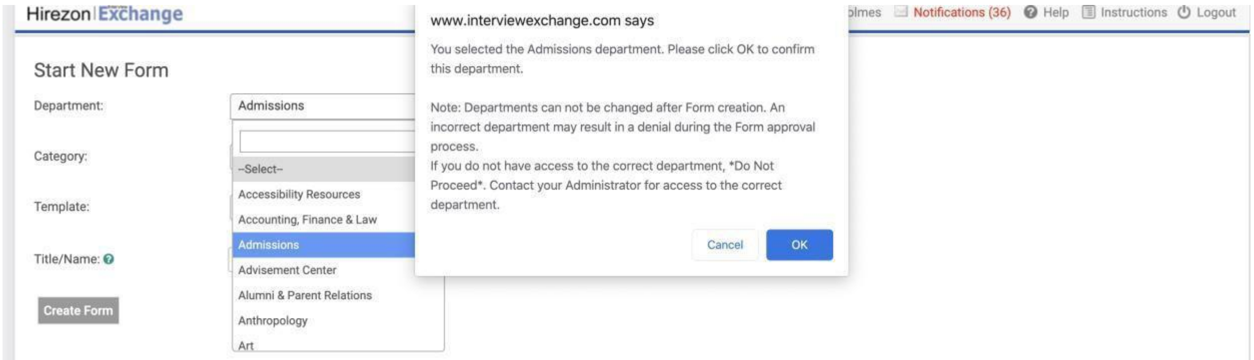


How to Start Form

+Start Form– Look for this icon in the top right corner of your screen, click this button. It will bring you to this screen:

Steps:

1.) Select the department this employee works for.



Note: This should be the department the creator of this form also works in. Each user (creator of form) only has access to the department they currently work in. If you are completing the form for someone in another department you can change the name of the department within the form in the department field.

2.) Select the category: Personnel Records

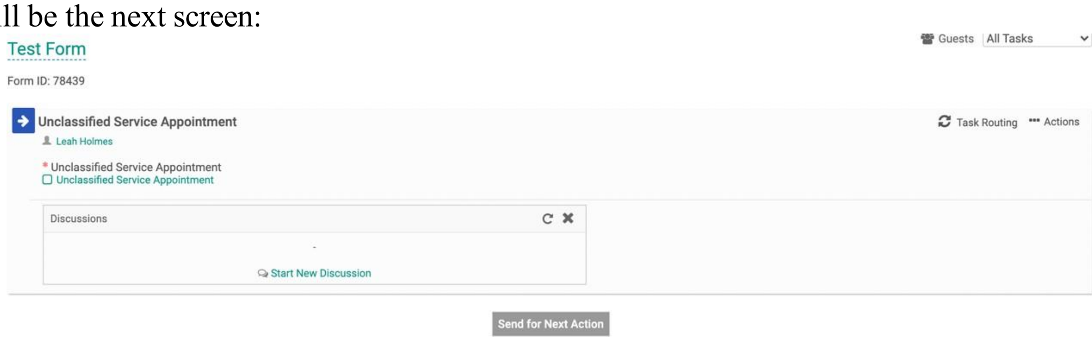
3.) Select the template: Unclassified Service Appointment Form

4.) Enter the Employees Name

Note: This section does say Title/Name- do not enter the title of this employee- it must be the employees name. This will allow for easy recognition when going through the approval process.

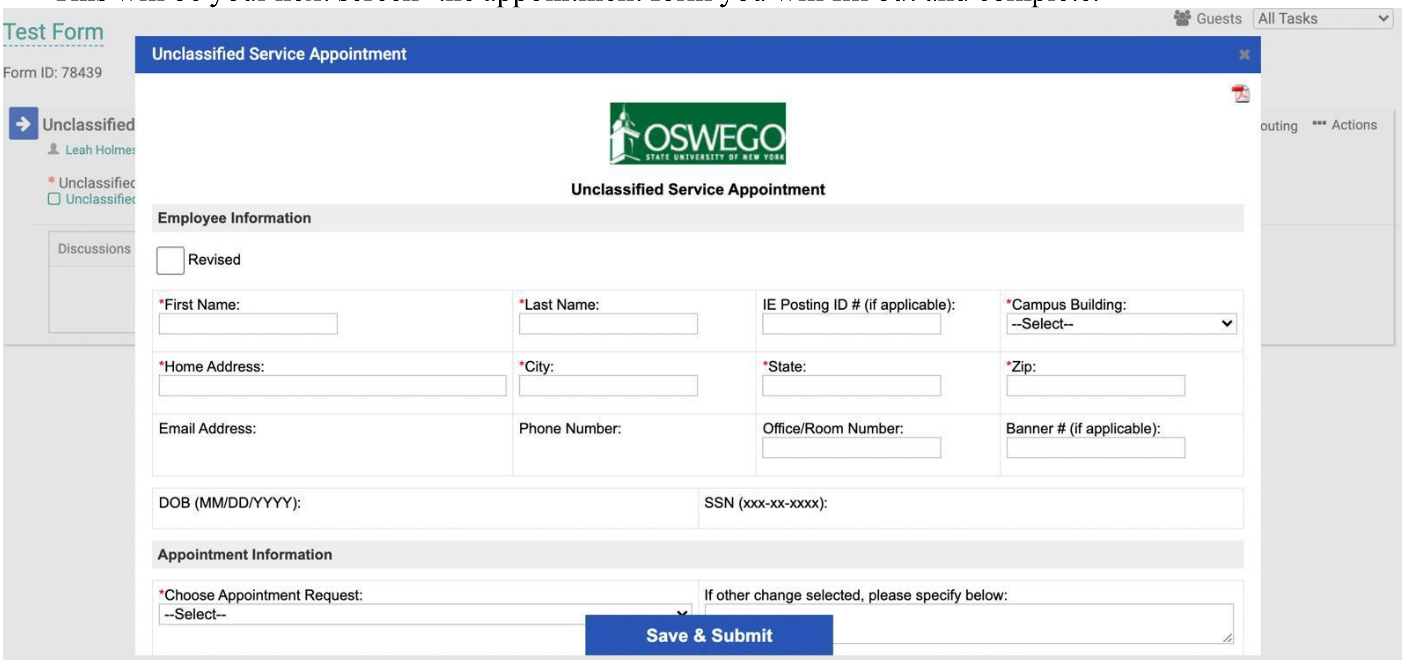
Click: Create Form

This will be the next screen:



5.) Click on: Unclassified Service Appointment

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

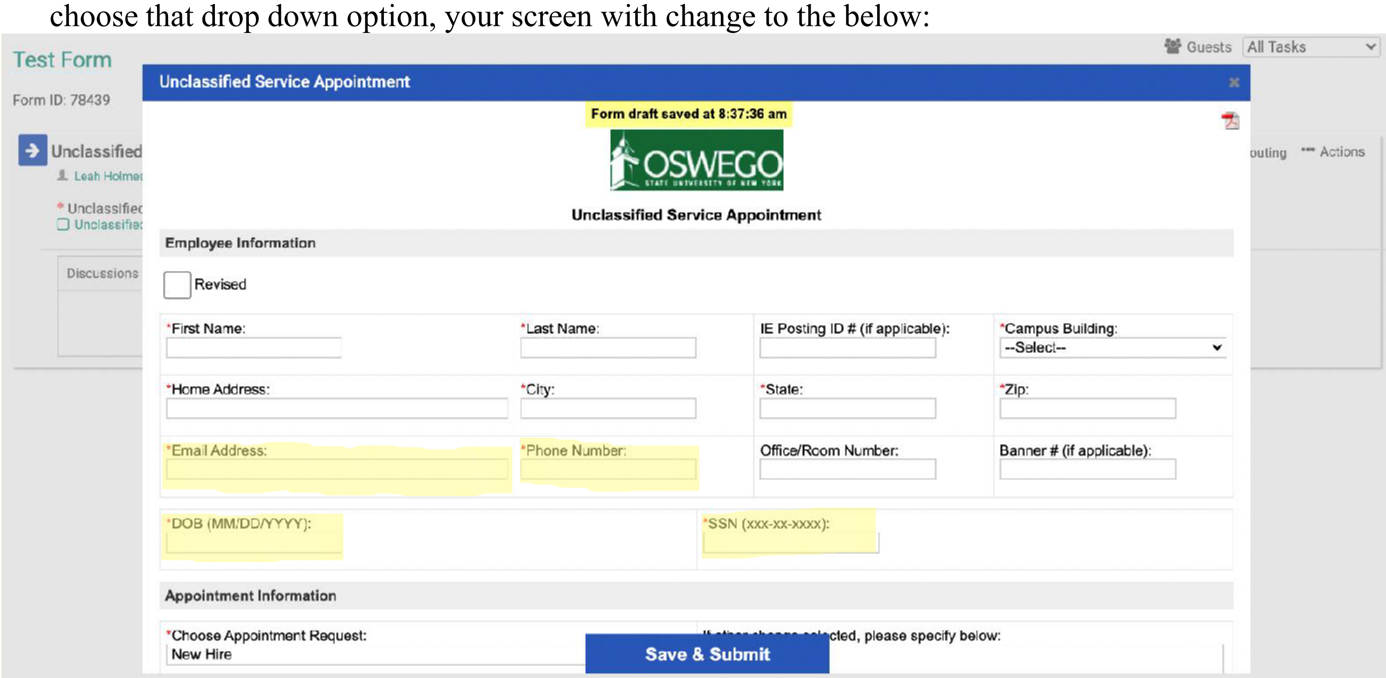


Note:

Within the "Employee Information" section, the following fields are for ***New Hires ONLY***.

- Email Address
- Phone Number
- Date of Birth (DOB)
- Social Security Number (SSN)

These 4 fields will not be fillable unless you click "New Hire" in the "Choose Appointment Request" drop down in the "Appointment Information" section. If you are completing the form for a New Hire and choose that drop down option, your screen with change to the below:



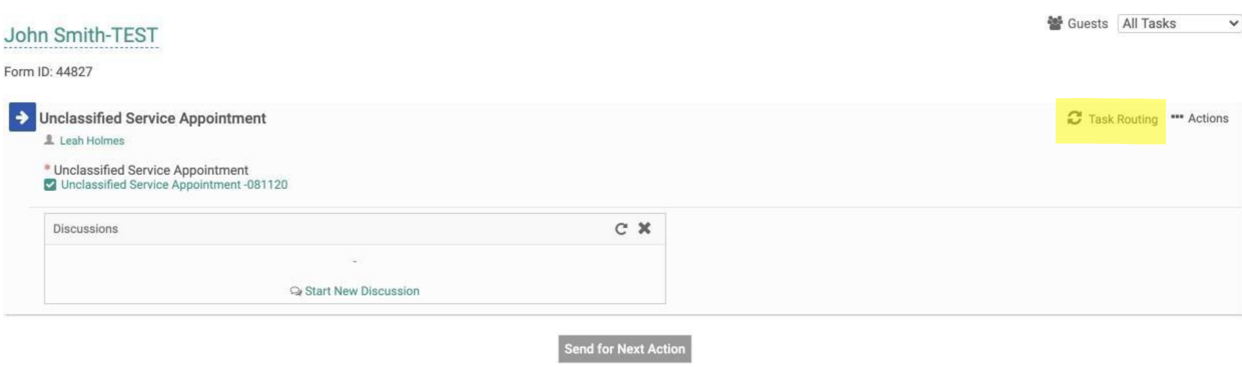
***All 4 fields will become fillable and are required. If you have any new hire paperwork from a new hire, please**

email all documents to hr@oswego.edu.

6.) Complete the Unclassified Service Appointment Form with all the required and applicable information to the appointment.

Click Save & Submit. Then click Continue.

7.) You will be back to this screen:



8.) Next, click on the "Task Routing" in the top right corner. 

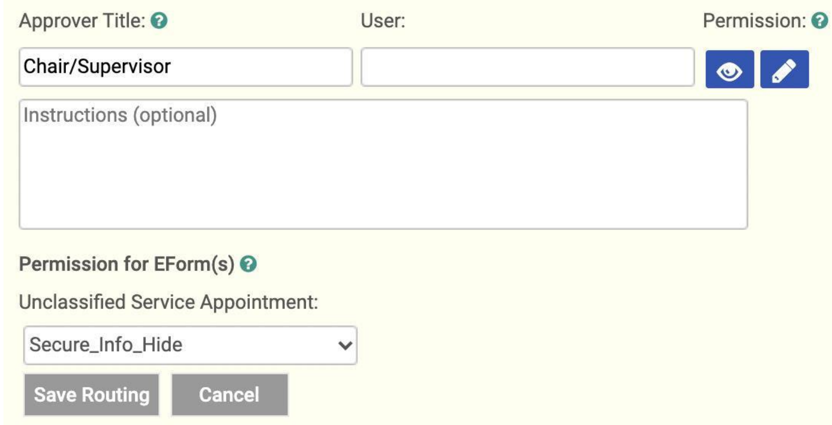
9.) This is where you will setup the task routing for the appropriate approvals. Click on the pencil icon on the **right**.

Note: The pencil icon on the left (under "User) means the approver has editing access to the form:

Task Routing

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

Upon clicking on the pencil icon on the **right**, it will drop down to this screen:



Note:
When setting up the task routing approvers, you will see a drop down that states Permission for EForm(s) with the two options of "Secure_Info_Hide" and "Secure_Info_View." ALL approvers are automatically hard coded to the "Secure_Info_Hide" option. ***Please leave it on the Secure_Info_Hide for ALL approvers.*** For security purposes, this option will hide the date of birth and social security number that may have been entered for a New Hire on the form. The only approver that will have access to see that information will be the Office of Human Resources.

Click in the box under "User" and type in the individual's name. If the approver is a certain department, type the department name. The email should pop up, and you should click on it to autofill into the box. Once the name/department is selected, you have the option to write any instructions or comments in the box, then click Save Routing. Repeat this process for the first three approvers. The rest are auto-filled for you.

Note: Do not enter the employee/department email-it will not pop up. You must first type 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

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.

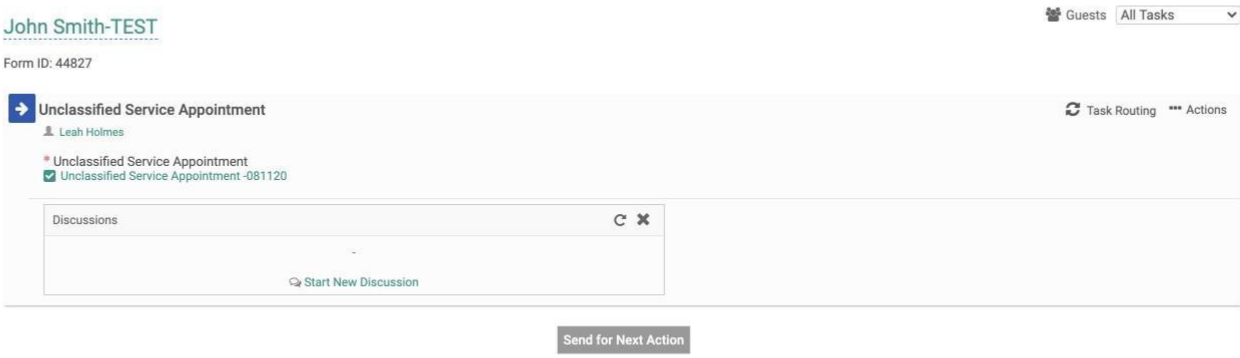
Finance Office: The Finance Office email is hard-coded into the task routing so you do not need to enter anything.

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.*

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

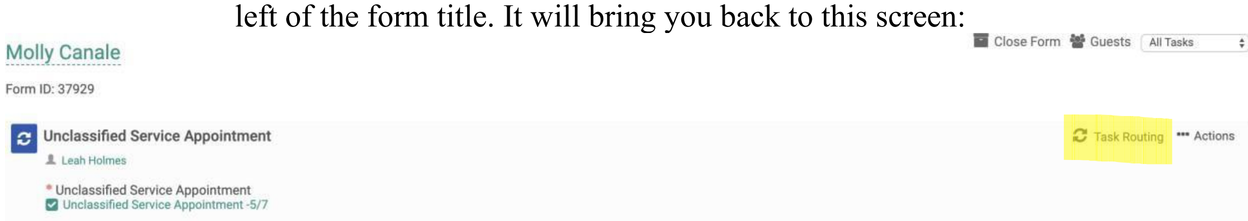
Check Status:

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:

a.) Go back to your Dashboard screen, then 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 the 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 currently sitting with.

Approver Steps:

a.) Go back to your Dashboard screen (Assigned to me), 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 currently sitting with.

Friendly Reminder:

As the creator of the form you are able to send a "reminder" to an approver within the task routing. 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.

**Note: Please be respectful with this feature and only send reminders when <u>absolutely</u> 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 or any approver in the task routing 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. C lick on that icon to see the changes made.

Additional Approver:

If there is an appointment that requires an additional approver (ex. Funding purposes) that is outside of the normal task routing approvers, the following process should be followed:

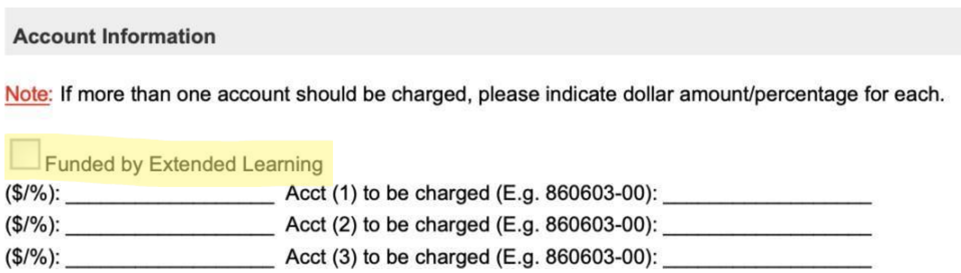
Steps:

1.) 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.

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

3.) 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

Note: There is a check box in the Account Information section to indicate a position is funded by Extended Learning if needed. This will help the Finance Office easily identify this information to re-route to Extended Learning.

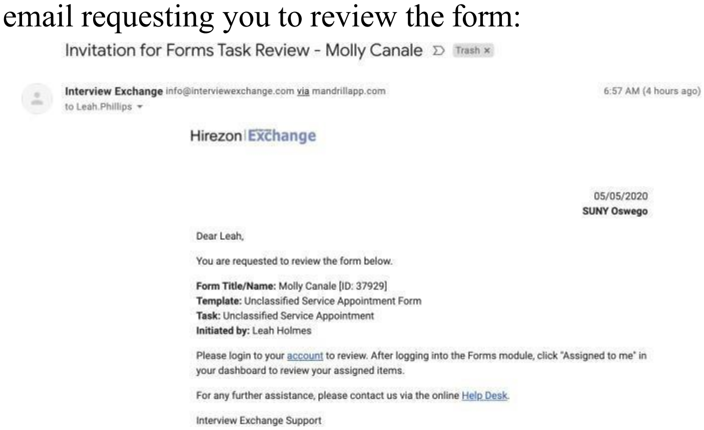


How to Review/Approve Form

As an approver within the task routing process, you will receive an email to review and either approve or deny a form.

Steps:

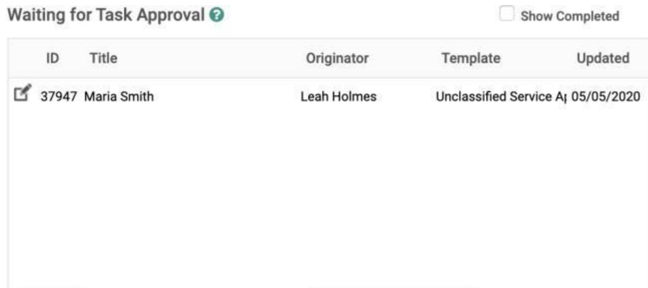
1. Receive general email requesting you to review the form:



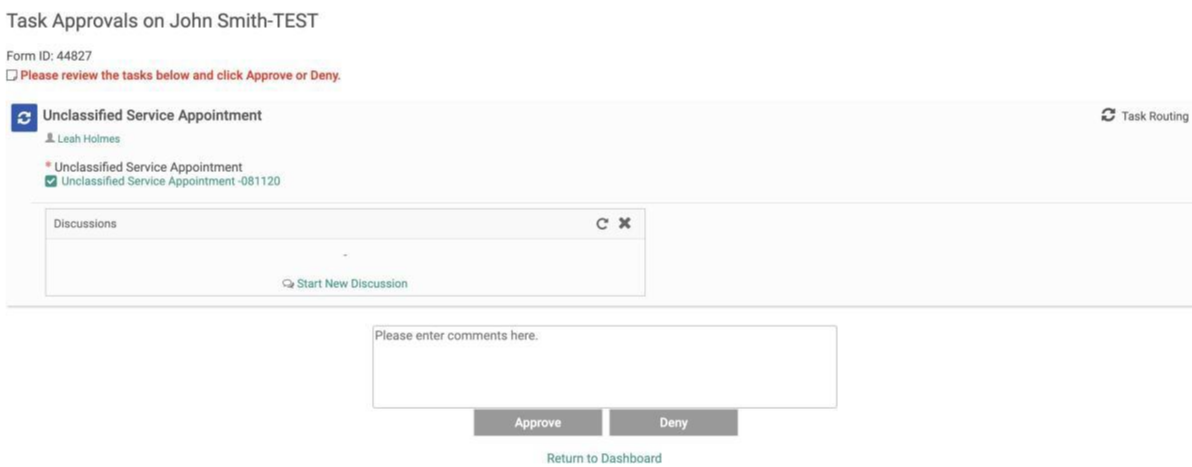
2.) Login into your Interview Exchange account and go to your Dashboard. Click the tab on the top: Assigned to me.

3.) The forms that are requiring your review and approval/denial will be in the section titled

Waiting for Task Approval:



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



5.) Click on Unclassified Service Appointment and review the information on the form. When you are finished reviewing click Save & Submit then click Continue.

**Note: All approvers have the option to 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 must 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:

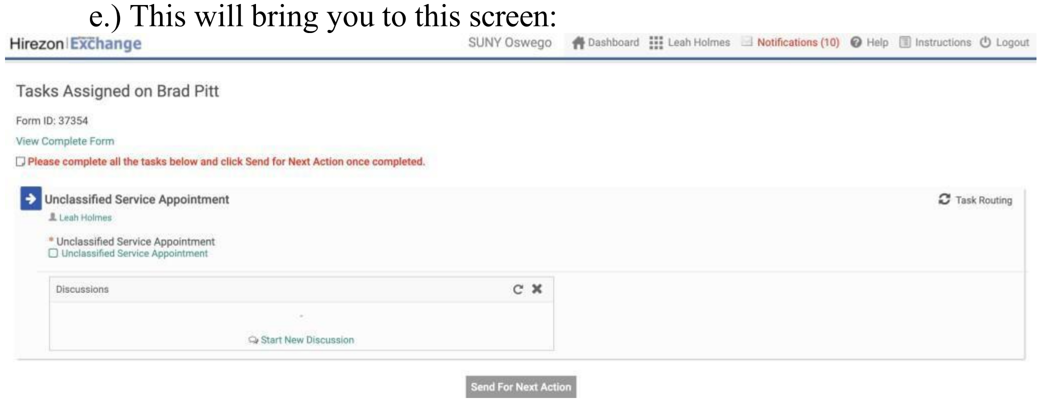
a.) Click on the box with pencil on the left of the form.

b.) It will bring you to this screen:

c.) Click on the …Actions drop down in the top right and click "Mark as Incomplete."

d.) Click on the same …Actions drop down in the top right, and this time click "Republish."

e.) This will bring you to this screen:



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

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

h.) If the task routing is the same, you can click Send for Next Action. If any of the approvers in the task routing need to be changed before you submit, you can make changes by clicking on Task Routing in the top right to edit.

i.) This will email the first approver again for this form and through the approval process.

5.) If the form was denied for other reasons that cannot be edited the *creator* must:

Steps:

a.) Forward the automatic denial email they received from Interview Exchange to everyone who *already* approved the form and HR.

b.) HR will then "close out" the form.

Completed Forms

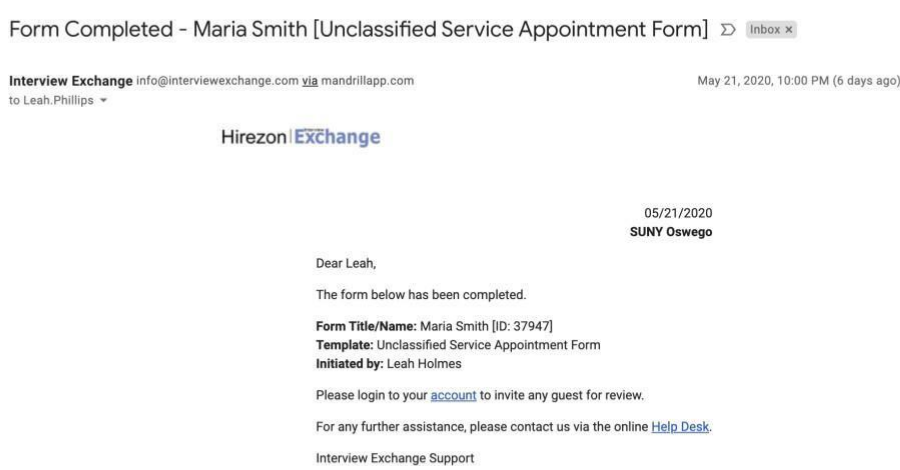
Once a form has been approved by everyone in the task routing process the form is considered complete and ready to process.

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 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 - Maria Smith [Unclassified Service Appointment Form] Inbox ×

Interview Exchange info@interviewexchange.com via mandrillapp.com May 21, 2020, 10:00 PM (6 days ago)
to Leah.Phillips

Hirezon Exchange

05/21/2020
SUNY Oswego

Dear Leah,

The form below has been completed.

Form Title/Name: Maria Smith [ID: 37947]
Template: Unclassified Service Appointment Form
Initiated by: Leah Holmes

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

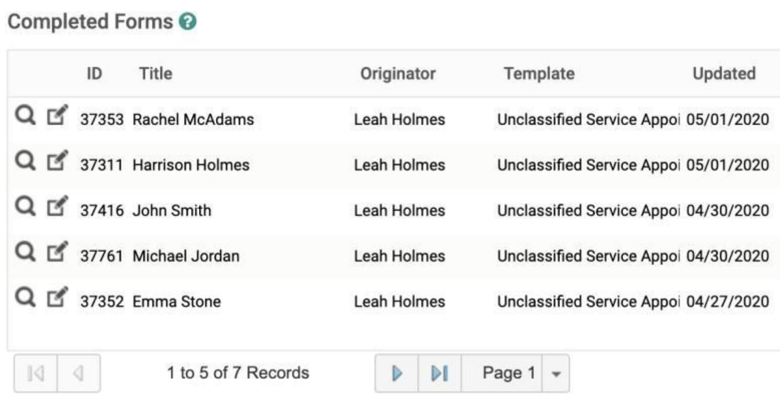
To find the completed forms:

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
	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

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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:

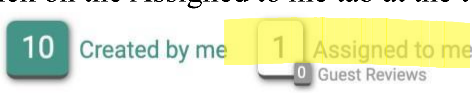
e.) You have the option to download into a PDF in the top right corner so you can print or save each completed/approved form.

If you were an *approver* of the form:

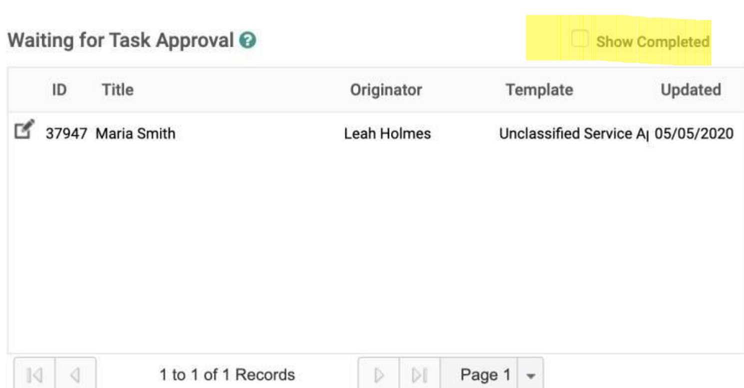
Steps:

a.) Login to your Interview Exchange account and go to your Dashboard.

b.) Click on the Assigned to me tab at the top of your screen:



c.) Look at the *Waiting for Task Approval* section- find the Show Completed box and click on it:



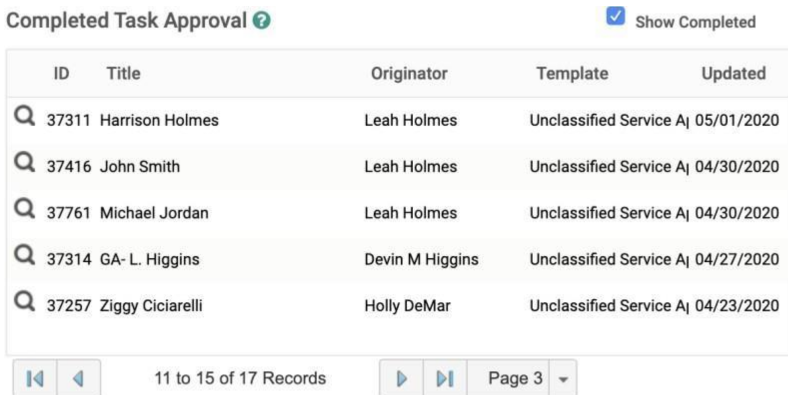
Waiting for Task Approval

Show Completed

	ID	Title	Originator	Template	Updated
	37947	Maria Smith	Leah Holmes	Unclassified Service A|	05/05/2020

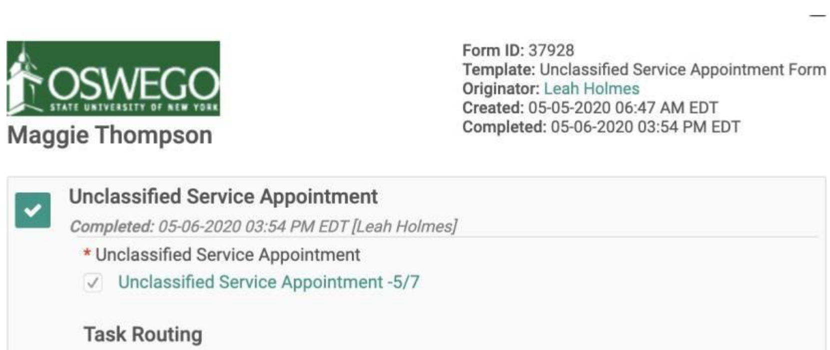
1 to 1 of 1 Records Page 1

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*:



ID	Title	Originator	Template	Updated
37311	Harrison Holmes	Leah Holmes	Unclassified Service A	05/01/2020
37416	John Smith	Leah Holmes	Unclassified Service A	04/30/2020
37761	Michael Jordan	Leah Holmes	Unclassified Service A	04/30/2020
37314	GA- L. Higgins	Devin M Higgins	Unclassified Service A	04/27/2020
37257	Ziggy Ciciarelli	Holly DeMar	Unclassified Service A	04/23/2020

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:



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

Unclassified Service Appointment Form

Employee Information

First Name: (Required)

Last Name: (Required)

IE Posting ID & RTF ID# (if applicable):
If this was a searched position and posted in Interview Exchange you can enter the Job Posting ID number.

Revised:
Check this box when you are submitting a revised form.

Home Address: (Required)

City: (Required)

State: (Required)

Zip: (Required)

Campus Building: (Required)

Office/Room#

Banner # (if applicable):

Email Address, Phone Number, DOB, SSN- ***New Hires ONLY***

Appointment Information

Choose Appointment Request: (Required)[1]

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

Employment Type: (Required)[2]

Appointment Type: (Required)[3]

Work Obligation: (Required)[4]

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

Line # (if applicable):

PSR TS [Line Number]
This is not required. If you do not know, it will be completed by the Finance Office.

Previous individual in this position:

Position Type: (Required)[5]

Part-Time (requires %)
This % determines eligibility for health insurance and is required if employee is part-time.

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

Salary:

Salary Increase Check Box(if applicable)

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1 There are four options to choose from: New Hire, Renewal, Promotion, Other Change.

2 There are three options to choose from: United University Professionals (UUP), Management Confidential (MC),Technical Assistant Casual

3 There are five options to choose from: Term, Temporary, Permanent (Professional Only), Continuing (FacultyOnly), Management Confidential (M/C)

4 There are four options to choose from: Annual, 10-Month, Semester, Other

5 There are two options to choose from: Full-Time, Part-Time

Effective Begin Date:

Effective End Date:

Supervisor: (Required)

Employee Local Title: (Required)

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

SL: (Salary Level)

Comments:
Any additional comments can be added here.

Account Information (Required)
(Check Box) Funded by Extended Learning

%/$:__________________	Acct. to be charged:______________
%/$:__________________	Acct. to be charged:______________
%/$:__________________	Acct. to be charged:______________

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

Part-Time Faculty Only

Number of courses:

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

Total credit hours or credit hour equivalent:

Comments:

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

Frequently Asked Questions

Q.) Can you edit the form after you submit?

A.) You have two options:

- Check the task routing and see which approver the form is sitting with. Email that approver and either ask them to deny the form so you can make a correction, or if they have editing access and are willing to edit the form for you. If that approver denies the form, you can then "Mark as Incomplete" and "Republish" the form so you can edit and resubmit. Full instructions are on pages 14-15.
- You can "Mark as Incomplete" and "Republish" (full instructions on pages 14-15) to bring the form back to you so you can edit and resubmit.

Q.) How do I get the form to Extended Learning (or another department that needs to approve (funding, etc.))?

A.) You do not include them into the task routing when you are setting it up. Once the form gets to the Finance Office for approval, they will re-route the form to Extended Learning (or appropriate department) for approval.

**When completing the form be sure to include the appropriate funding account (ie. Extended Learning). Be sure to check the box stating the appointment is Funded by Extended Learning in the Account Information section. These indicators will let Finance know this form must be re-routed.

Q.) Why isn't someone's name popping up in the task routing?

A.) If someone is not popping up in the task routing that usually means they do not have an account setup yet or access to the forms. Please email hr@oswego.edu and we can get them added into the system.

Q.) When I type in the email address into task routing, I receive an error message?

A.) When putting in approvers within task routing the system only reads employee/department names. You cannot put in an email address. Once you type in a person's name or department name the email address should pop up for you to click on.

Q.) Should I be putting the title of employee or name of employee when completing the Unclassified Service Appointment form?

A.) In the Title/Name section when starting a new Unclassified Service Appointment form you must put the *Employees Name*. That way it is easy to recognize when going through the approval process.

Q.) When I receive a notification email from Interview Exchange stating I have a form I must review, when I click on the link within the email to go to my account I receive an error message stating "You do not have the permission to perform the operation."

A.) If you receive this error message, do not click on the link within the email. You must click this link to login to your Interview Exchange account. This is also located on the front page of the HR website.

Q.) What should I do with new hire paperwork I have received from a new hire (tax forms, I-9, etc.)?

A.) If a new hire completes any new hire paperwork and/or you have completed the I-9 with them please email ALL documents to hr@oswego.edu.