

How to Guide:

STUDENT APPOINTMENT FORM

Interview Exchange
Electronic Forms Module



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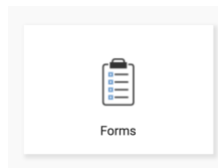
Login to Interview Exchange

1.) Click here to sign into [Hirezon/Interview Exchange](#) using single sign on.

2.) You will then enter your Laker NetID and password, click Login and it will direct you to the main Hirezon/Interview Exchange page.

****For department Hirezon/Interview Exchange accounts you will login using the same login link as above with your Interview Exchange department email and associated password.**

3.) Click on this icon:



4.) This will bring you to your main Dashboard.

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 the student employee will work 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: **Student Assistant 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 **employee's name**. This will allow for easy recognition when going through the approval process.*

Click: [Create Form](#)
This will be your next screen:

John Doe

Guests All Tasks

Form ID: 347533

Student Appointment Form Task Routing Actions

IE Forms - HR

Student Appointment Form

Student Assistant Appointment Form

Discussions

Start New Discussion

Send for Next Action

5.) Click on: [Student Assistant Appointment Form](#)
This will be your next screen:

Student Assistant Appointment Form

Student Assistant Appointment Form

Instructions

Please see full instructions [here](#).

For **NEW HIRES ONLY** - Forms I-9, W-4 (federal), IT-2104 (state) must be submitted to the Payroll Office.

****Form I-9 must be completed and submitted within THREE (3) days of hire.**

Maximum Hours per week:

- 20 hours when classes are in session
- 29 hours when classes are not in session

Employee Information

☐ Revised:

If revised, provide original IE form # (number only entry):

*Appointment Type:
--Select--

*First Name (Legal Name):

*Last Name (Legal Name):

Social Security Number: (XXX-XX-XXXX)

Date of Birth:

Home Address:

City:

State:

Zip:

Appointment Information

*Payment Type:
--Select--

*Payment A
\$

Save & Submit

*Supervisor:

6.) Complete the Student Assistant Appointment Form with all the required and applicable information about the appointment.

Click Save & Submit. Then click Continue.

7.) You will be back to this screen.

The screenshot shows a web interface for a 'Student Appointment Form'. At the top left, the user 'John Doe' is logged in, with a 'Form ID: 347533' below it. On the top right, there are 'Guests' and 'All Tasks' dropdown menus. The main header area includes a blue arrow icon, the title 'Student Appointment Form', and a 'Task Routing' button with a circular arrow icon. Below the header, there is a list of forms: 'IE Forms -HR', 'Student Appointment Form' (marked with a red asterisk), and 'Student Assistant Appointment Form' (marked with a green checkmark). A 'Discussions' section is visible, containing a text area and a 'Start New Discussion' button. At the bottom center, there is a grey button labeled 'Send for Next Action'.

You will then click the **Send for Next Action** button. This submits the form to the first approver.

Note: Task Routing is hard-coded to the Finance and Payroll Office. This means that both departments will receive the form for review after you click **Send for Next Action**

Task Routing Features

Check Status:

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

Steps:

- a.) Go back to your Dashboard screen, then go to the Waiting for Task Approval section. This is where your forms will be located 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:

John Doe

Form ID: 347533

Close Form Guests All Tasks

Student Appointment Form

IE Forms +HR

* Student Appointment Form

✓ Student Assistant Appointment Form

Discussions

Start New Discussion

- 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.

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 “Task 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 to see the changes made.

Finance Office

 Finance Office

Complete [09-01-2026 04:33 PM EDT]



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 enter a comment before submitting.
- 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 the form, 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 the form 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:

John Doe

Close Form Guests All Tasks

Form ID: 347533

 Student Appointment Form

IE Forms -HR

* Student Appointment Form

☒ Student Assistant Appointment Form

Discussions

 Start New Discussion

- 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:

Tasks Assigned on John Doe

Form ID: 347533

[View Complete Form](#)☐ Please complete all the tasks below and click Send for Next Action once completed.

 Student Appointment Form

IE Forms -HR

* Student Appointment Form

☐ Student Assistant Appointment Form

Discussions

 Start New Discussion

Send For Next Action

- f.) You will see the red comment stating to complete the tasks. Click on [Student Assistant Appointment Form](#).
- g.) This will open up the form you submitted, you can then make edits. As a reminder: be sure to check the revised box at the top of the form. Click Save and Submit. Then on the next screen, click Continue.
- h.) You will then click [Send for Next Action](#).
- 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 Finance and Payroll.
- b.) Payroll 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.

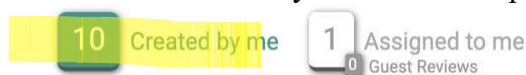
A student can only begin work upon full approval of the Student Assistant Appointment Form, and after all required forms specified in the Student Employee Instructions have been submitted to Payroll.

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

See the steps below on where to find all 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:

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

1 to 5 of 7 Records Page 1

- d.) You will be able to view any of these forms by clicking on the magnifying glass on the left of the form and it will bring you to a preview screen.
- e.) You have the option to download the form into a PDF in the top right corner so you can print or save each completed/approved form.

For each approved form, you will receive an automatic email stating the form you submitted is complete.

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.
- You can “Mark as Incomplete” and “Republish” 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.

Q.) Should I be entering the title of the employee or name of the employee when completing the Student Assistant Appointment Form?

A.) When starting a new Student Assistant Appointment Form, in the Title/Name section, you must put the Employees Name. That way it is easy to recognize when going through the approval process.

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 bring ALL documents to payroll@oswego.edu.

Q.) Where can I learn more about how our campus uses Hirezon/Interview Exchange?

A.) Please view the document in this link for a [Hirezon/Interview Exchange Overview](#).