

Interview Exchange Instructions

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Interview Exchange Instructions

Logging into your Hirezon / Interview Exchange Account:

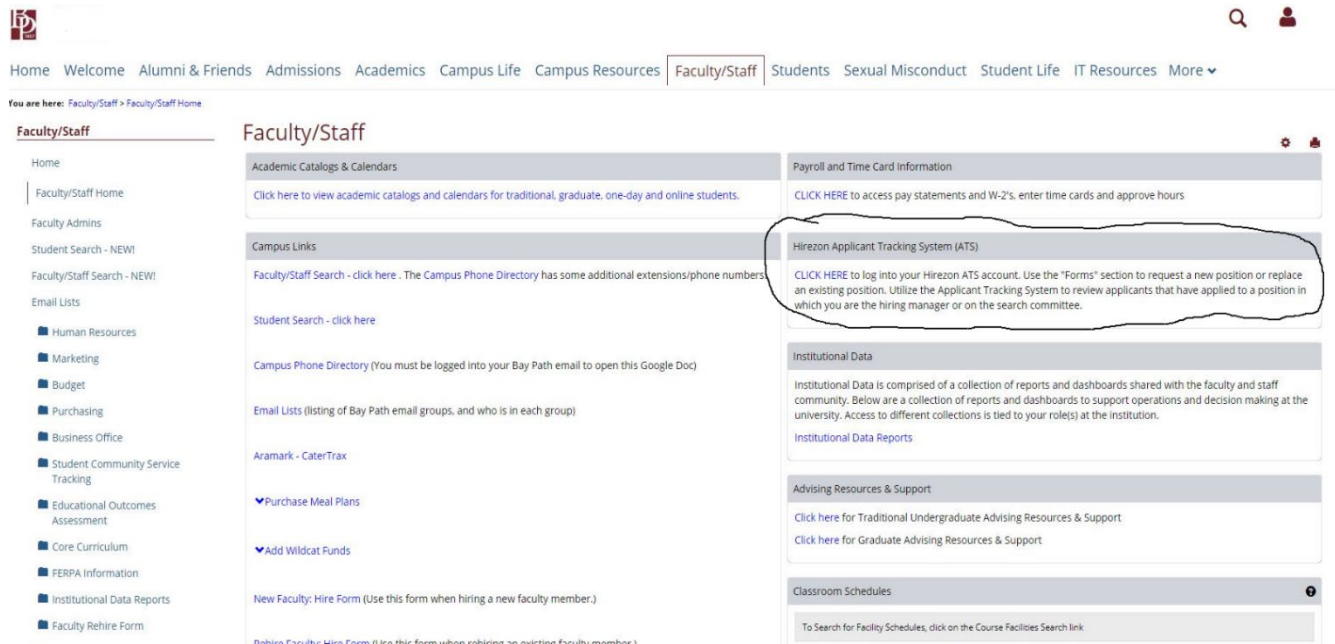
There are three ways in which you can log into your account.

1. If you are already logged into the My Bay Path portal or your Bay Path email. Click on this link:

<https://sso.interviewexchange.com/baypath/sso.jsp>

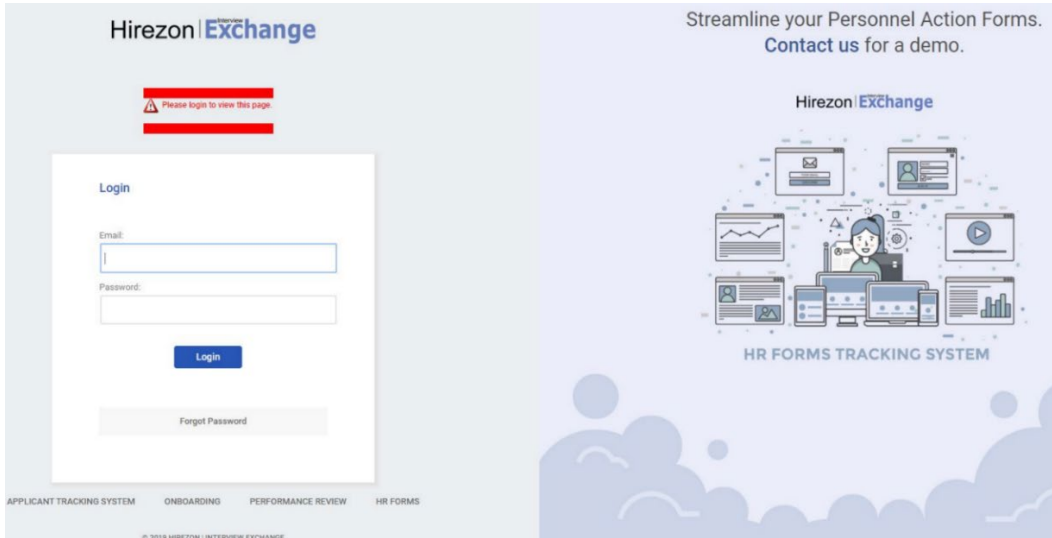
**** It is recommended that you save the link to your favorites and use the link to login.**

2. On the Faculty/Staff page in the “Hirezon Applicant Tracking System (ATS) section of the My Bay Path portal. (see screen shot below) You will be automatically logged in and taken to the main screen of the Applicant Tracking System.



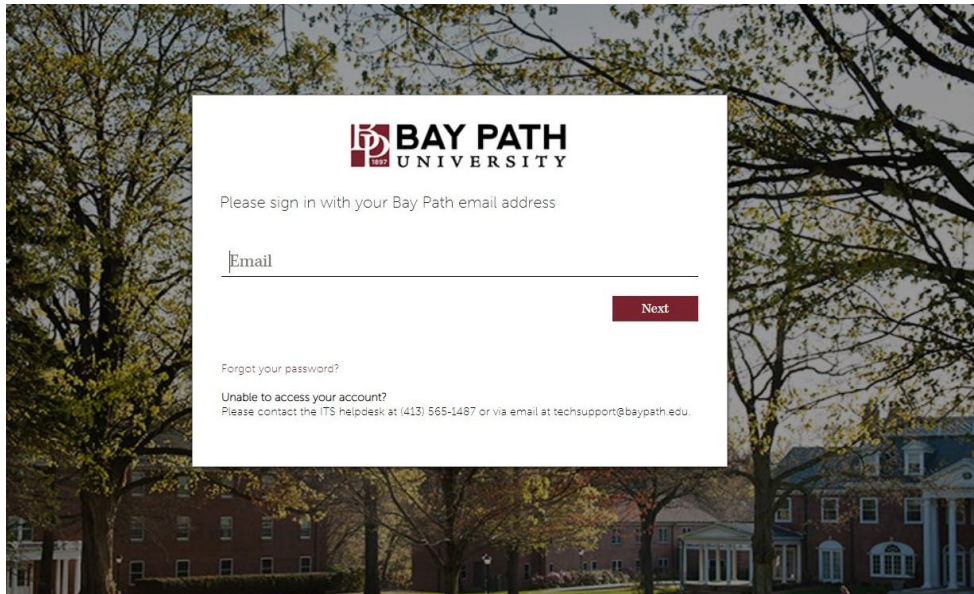
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- If you are not logged into the My Bay Path portal or your Bay Path email and you click on the link above, you will be directed to the ATS login screen. See screenshot below.



Simply:

- Enter your Bay Path email address
- Click in the Password box (no need to enter your password)
- You will be directed to the Bay Path portal login page. This is the same page you would log into to access your Bay Path email. See screenshot below.
- Enter your Bay Path email address once again
- Click “Next.”
- Enter your Bay Path portal password (Bay Path email password)



Interview Exchange Instructions

Initiating Employee Request Form for Faculty Positions (Not Adjuncts)

For Faculty positions that have been previously posted through this system only:

To initiate an employee request form for a position that has not been previously posted through this system, please refer to that section.

1. **ALWAYS SEARCH HIREZON SYSTEM FOR THE POSITION IN THE JOB LIBRARY FIRST. IF THIS IS A BRAND NEW POSITION OR THE POSITION IS NOT LISTED IN THE JOB TEMPLATE LIBRARY, PROCEED TO INITIATING EMPLOYEE REQUEST FORM IN NEW POSITION SECTION.**
2. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation or compensation range.
 - c. All job description information. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.
 - ii. Grant budget number (xx-xx-xxxx).
3. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
4. Choose the “Forms” icon
5. Choose “+ Start New Form” icon in upper right corner.
6. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
7. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
8. Template
 - a. Choose – “Position Request”.
 - b. Do not select Position Request (Adjunct) for Faculty positions. This should only be used when posting an adjunct or adjunct type position (i.e. Subject Material Expert, Lead Adjunct, Directed Study etc).

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9. If this position has been previously entered into the system, search the job template library to access previously posted position with the same title. This may save you significant data entry while allowing you to make any necessary changes to the previous position. To search the job template library:
 - a. Choose "Use Job Template".
 - b. Select the previously posted position with same title.
 - c. If this is the position you would like to use as a "template", select "Use This Job Template" located at end of the job template. ** Do not worry if position details are not exactly the same. You will be able to make changes.*
 - d. The Job Title should appear in the Title section. If the title of the position is changing, type in the new title in the title section. Note: If the position is 100% online/remote please add "Online/Remote" at the end of the position title. (Ex. "Professor Math (Online/Remote)") If the title is not changing, skip this step. Do not abbreviate any words in the title. Using back arrow to return to previous page will erase all information you have entered.
 - e. Choose "Create Form".
 - f. If it is not the position you would like to use as a template, close window and select another position from the library.
10. Choose Employee Request Form
 - a. Choose "Employee Request Form" w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an "*" are required. You will not be able to proceed to the next step without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Once complete, choose "Save and Submit".
 - e. Review ERF for accuracy. If you need to make changes, choose "Edit" and make necessary corrections.
 - f. Once completed, choose "Continue".
 - g. You will then have a "✓" next to ERF.
11. In the Employee Request Form section, choose the title of position under Job Details.
12. Make all necessary changes to the position, job summary, essential duties, job requirements etc. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - a. If the position is 1%-100% remote indicate this in the job description.

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- b. In the optional field section, please choose appropriate Job Type and Job Category from drop down menus.
 - c. Once all job changes are made choose "Save Job Details" at end.
 - d. Review position information. If position information is inaccurate, select "edit" and correct information.
 - e. Once the information is accurate, choose "Close".
 - f. After choosing "Close" a "✓" will appear next to the position title under job details.
13. Choose Physical Demands Chart.
- a. Complete the Physical Demands Chart.
 - b. Select "Save and Submit".
 - c. Review Physical Demands Chart for accuracy. If changes should be made, choose "Edit" and make necessary corrections.
 - d. Choose "Continue".
 - e. You will then see a "✓" next to Physical Demands Chart.
14. Attach any supporting documents such as copies of grants, etc.
15. OPTIONAL: You may enter information or notes in the "Start a Discussion" box.
- a. The information entered will be seen by the approvers.
 - b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit "Submit".
16. You must now set up the approval path for this position. This is the electronic path or routing for position approval.
- a. Select "Routing" in the upper right corner located to the right of Job Details.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. You are considered the "Position Originator". The next individual that must approve this position is your direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Position Originator's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select "Save Routing".
 - h. Follow same procedure for your Divisional VP/ Chief.
 - i. If you are a Divisional VP or Chief must enter yourself as:
 1. Position Originator's Supervisor AND
 2. Division VP / Chief.

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3. You will have to approve this position two times. Once in your supervisory role and once in your divisional VP / Chief role.
17. Choose “Send for Next Action” button to begin the approval process.
 18. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
 - a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers’ name from the list.
 - d. A pop-up window will appear asking “Are you sure you want to change the Assignee? All the data entered for this task will be lost.”
 - e. Select “Ok”.
 - f. The hiring manager’s name should now appear under the Recommendation To Hire.
 19. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
 - a. Select “Routing” to the right of Recommendation To Hire.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. The hiring manager is considered the “Position Originator”. The next individual that must approve this position is the hiring manager’s direct supervisor.
 - d. Select the pencil icon under “Actions” next to the title “Hiring Manager’s Supervisor”.
 - e. In the “User” box, type the first few letters of your supervisor’s first name.
 - f. Select your supervisor’s name and email from the list.
 - g. Select “Save Routing”.
 - h. If additional individuals must approve the candidate hired, you must then add additional approvers.
 - i. If additional approvals are required, click on “Show Add/Edit Routing”.
 - j. Put the title of the additional approver in the Title Box.
 - k. In the “User” box, type the first few letters of your supervisor’s first name.
 - l. Select your supervisor’s name and email from the list.
 - m. Select “Save Routing”.
 - n. Follow same procedure if additional approvals are needed.
 - 20. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.**

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- a. In the Recommendation to Hire section, to the right, click “Actions”.
- b. Click “Clone Workflow”.
- c. A pop-up window will appear asking if you are sure you want to clone workflow.
- d. Click “Ok”.
- e. Another Recommendation to Hire will appear.
- f. If more than one additional person is to be hired, repeat. **NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.**

21. Once approved and all changes made, position will be posted by HR.

22. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address once you set your “Alerts”.

Cloning or duplicating a Faculty position that you previously posted through this system:

Cloning a position exactly duplicates a previously approved and posted position. It will duplicate or “clone” the Employee Request Form, Job Details and Physical Demands (if applicable).

***** You can only clone a position you previously posted. You cannot clone a position someone else posted. When cloning a position, it is critical that you review each form in its entirety for accuracy and change previously entered information as necessary. (Ex. Times, dates, job details, task routing, pay supervisor information etc.)**

1. Go to your “Forms” Page.
2. In the “Completed Forms” section, locate the position you wish to clone.
3. Click the “edit” icon next to the position.
4. Click “Actions”.
5. Select “Copy Data to New Form”.
6. Click “Ok”.
7. Select the appropriate department.
8. Category.
9. Title
10. Create Form.
11. Then review all information for accuracy. Then select appropriate approval task routing
12. Send for Next Action.

Interview Exchange Instructions

For Faculty positions that have not been previously posted through this system:

To initiate an employee request form for a position that has previously posted through this system, please refer that section.

1. **ALWAYS SEARCH HIREZON SYSTEM FOR THE POSITION IN THE JOB LIBRARY FIRST. IF THIS IS A BRAND NEW POSITION OR THE POSITION IS NOT LISTED IN THE JOB TEMPLATE LIBRARY, PROCEED TO INITIATING EMPLOYEE REQUEST FORM IN NEW POSITION SECTION.**
2. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation or compensation range.
 - c. All job description information. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.
 - ii. Grant budget number (xx-xx-xxxx).
3. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
4. Choose the “Forms” icon.
5. Choose “+ Start New Form” icon in upper right corner.
6. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
7. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
8. Template
 - a. Choose – “Position Request”.
 - b. Do not select Position Request (Adjunct) for Faculty positions. This should only be used when posting an adjunct position.
9. If this is a **new** position (new meaning not previously entered into this system).
 - a. Select “Use Job Template Library”.

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- b. Select “Faculty Template” from the library. You can type it in the search box if you do not see it listed. *
Do not worry if the title or position details are not exactly the same as the position you are requesting.
You will be able to make changes.
 - c. Scroll to the end and select “Use This Job Template”.
 - d. You will be back at the “Start New Form Screen”.
 - e. Replace “Faculty Template” in title box with the EXACT title of the new position. Do not abbreviate or shorten words in the title. Note: If the position is 100% online/remote please add “Online/Remote” at the end of the position title. (Ex. “Course Builder (Online / Remote)” or “Professor Math (Online/Remote”).
 - f. If position is not 100% online / remote do not place it in the job title. Indicate the percentage remote when updating the position description.
 - g. Click “Create Form”.
10. Choose “Employee Request Form” (ERF).
- a. Choose ERF w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an “*” are required. You will not be able to proceed without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Choose “Save and Submit”.
 - e. Review ERF for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - f. Choose “Continue”.
 - g. You will then see a “✓” next to ERF.
 - h. Attach any supporting documents such as copies of grants etc.
11. Select title of position in upper left of screen under Job Details.
- a. Do not change Company Description section. This is pre-populated with University approved language and is not to be altered.
 - b. Enter Job Description information. ** Note everything listed in the job description will be in the posted advertisement as written. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - i. Some information has been pre-populated. This information should not be deleted.
 - ii. Enter position code immediately after colon. If you do not know correct position code, leave blank. HR will complete.
 - iii. Enter job type immediately after colon. (Example: Full Time or Part Time)

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- iv. Enter standard working hours immediately after colon. (Example: 8:30am-5:00pm or 2:00pm-5:00pm)
 - v. Enter standard work days immediately after colon. (Example: Mon – Fri or Mon, Wed & Fri)
 - vi. Enter position location immediately after colon: (Example: On Ground or Remote)
 - vii. Enter all other job description information after completing steps i-vi. This is the section where you enter Job Summary, Essential duties etc. Please be sure it is in the same format (i.e. font, bulleted etc.)
 - viii. If position is 1%-100% remote, please include this in the job description to ensure applicants are aware.
- c. Enter the Job Summary information after colon.
 - d. Enter Essential functions use bulleted format to enter each essential function on a new line.
 - e. Enter Requirements. ** Note everything listed in the job description will be in the posted advertisement as written. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - i. Some requirements have been pre-populated. This information should not be deleted. These pre-populated requirements should be listed LAST.
 - ii. To add requirements to the list, place your cursor after the first bullet point and hit “enter”. Then type your first requirement, hitting enter after each new requirement.
 - f. Do not change any information in Additional Information section. This is prepopulated with desired University language and is not to be altered.
 - g. Do not enter anything in the Application Instruction section. HR will populate with desired University language.
 - h. Do not enter any information in the Internal Description section.
 - i. In the Optional Field Box:
 - i. Select appropriate Job Type from drop down menu.
 - ii. Select appropriate Job Category from drop down menu.
 - j. Choose “Save Job Details” when finished.
 - k. Review job details for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - l. Choose “Close” in pop up window once you are satisfied all information is accurate.
 - m. You will then see a “✓” next to the position title under job details.
12. Choose “Physical Demands Chart”.

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- a. Choose Physical Demands Chart w/ blank box next to it.
 - b. Complete the Physical Demands Chart. This is required, you will not be able to proceed without completing this chart.
 - c. Select "Save and Submit".
 - d. Review Physical Demands Chart for accuracy. If changes should be made, choose "Edit" and make necessary corrections.
 - e. Choose "Continue".
 - f. You will then see a "✓" next to Physical Demands Chart.
13. Attach any supporting documents such as copies of grants, etc.
14. OPTIONAL: You may enter information or notes in the "Start a Discussion" box.
- a. The information entered will be seen by the approvers.
 - b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit "Submit".
15. You must now set up the approval path for this position. This is the electronic path or routing for position approval.
- a. Select "Routing" in the upper right corner located to the right of Job Details.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. You are considered the "Position Originator". The next individual that must approve this position is your direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Position Originator's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select "Save Routing".
 - h. Follow same procedure for your Divisional VP/ Chief.
 - i. If you are a Divisional VP or Chief must enter yourself as:
 1. Position Originator's Supervisor AND
 2. Division VP / Chief.
 3. You will have to approve this position two times. Once in your supervisory role and once in your divisional VP / Chief role.
 - j. Once you have completed the routing, click on the "x" in the upper right of the task routing pop-up window to exit.
16. Choose "Send for Next Action" button to begin the approval process.

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17. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
 - a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers' name from the list.
 - d. A pop-up window will appear asking "Are you sure you want to change the Assignee? All the data entered for this task will be lost."
 - e. Select "Ok".
 - f. The hiring manager's name should now appear under the Recommendation To Hire.
18. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
 - a. Select "Routing" to the right of Recommendation To Hire.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. The hiring manager is considered the "Position Originator". The next individual that must approve this position is the hiring manager's direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Hiring Manager's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select "Save Routing".
 - h. If additional individuals must approve the candidate hired, you must then add additional approvers. If not, skip to step 19.
 - i. If additional approvals are required, click on "Show Add/Edit Routing".
 - j. Put the title of the additional approver in the Title Box.
 - k. In the "User" box, type the first few letters of your supervisor's first name.
 - l. Select your supervisor's name and email from the list.
 - m. Select "Save Routing".
 - n. Follow same procedure if additional approvals are needed.
- 19. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.**
 - a. In the Recommendation to Hire section, to the right, click "Actions".
 - b. Click "Clone Workflow".

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- c. A pop-up window will appear asking if you are sure you want to clone workflow.
 - d. Click "Ok".
 - e. Another Recommendation to Hire will appear.
 - f. If more than one additional person is to be hired, repeat. ***NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.***
20. Once approved and all changes made, position will be posted by HR.
21. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address once you set your "Alerts".

Interview Exchange Instructions

Initiating Employee Request Form for Staff Positions

For Staff positions that have been previously posted through this system only:

To initiate an employee request form for a position that has not been previously posted through this system, refer to page 16.

1. **ALWAYS SEARCH HIREZON SYSTEM FOR THE POSITION IN THE JOB LIBRARY FIRST. IF THIS IS A BRAND NEW POSITION OR THE POSITION IS NOT LISTED IN THE JOB TEMPLATE LIBRARY, PROCEED TO INITIATING EMPLOYEE REQUEST FORM IN NEW POSITION SECTION.**
2. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation, compensation range, hourly rate or hourly rate range.
 - c. All job description information. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.
 - ii. Grant budget number (xx-xx-xxxx).
3. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
4. Choose the “Forms” icon.
5. Choose “+ Start New Form” icon in upper right corner.
6. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
7. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
8. Template
 - c. Choose – “Position Request”.
 - d. Do not select Position Request (Adjunct) for Staff positions. This should only be used when posting an adjunct or adjunct type position (i.e. Subject Material Expert, Lead Adjunct, Directed Study etc.).

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9. If this position has been previously entered into the system, search the job template library to access previously posted position with the same title. This may save you significant data entry while allowing you to make any necessary changes to the previous position. To search the job template library:
 - a. Choose "Use Job Template".
 - b. Select the previously posted position with same title.
 - c. If this is the position you would like to use as a "template", select "Use This Job Template" located at end of the job template. ** Do not worry if position details are not exactly the same. You will be able to make changes in the next step.*
 - d. The Job Title should appear in the Title section. If the title of the position is changing, type in the new title in the title section. Note: If the position is 100% online/remote please add "Online/Remote" at the end of the position title. (Ex. "Professor Math (Online/Remote)") If the title is not changing, skip this step. Do not abbreviate any words in the title. Using back arrow to return to previous page will erase all information you have entered.
 - e. Choose "Create Form".
 - f. If it is not the position you would like to use as a template, close window and select another position from the library.
10. Choose Employee Request Form.
 - a. Choose ERF w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an "*" are required. You will not be able to proceed without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Once complete, choose "Save and Submit".
 - e. Review ERF for accuracy. If you need to make changes, choose "Edit" and make necessary corrections.
 - f. Once completed, choose "Continue".
 - g. You will then see a have a "✓" next to ERF.
 - h. Attach any supporting documents such as copies of grants, etc.
11. In the Employee Request Form section, choose the title of position under Job Details.
12. Make all necessary changes to the position, job summary, essential duties, job requirements etc. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - a. If the position is 1%-100% remote indicate this in the job description.

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- b. In the optional field section, please choose appropriate Job Type and Job Category from drop down menus.
 - c. Once all job changes are made choose "Save Job Details" at end.
 - d. Review position information. If position information is inaccurate, select "edit" and correct information.
 - e. Once the information is accurate, choose "Close".
 - f. After choosing "Close" a "✓" will appear next to the position title under job details.
13. Choose Physical Demands Chart.
- a. Complete the Physical Demands Chart.
 - b. Select "Save and Submit".
 - c. Review Physical Demands Chart for accuracy. If changes should be made, choose "Edit" and make necessary corrections.
 - d. Choose "Continue".
 - e. You will then see a "✓" next to Physical Demands Chart.
14. Attach any supporting documents such as copies of grants, etc.
15. OPTIONAL: You may enter information or notes in the "Start a Discussion" box.
- a. The information entered will be seen by the approvers.
 - b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit "Submit".
16. You must now set up the approval path for this position. This is the electronic path or routing for position approval.
- a. Select "Routing" in the upper right corner, to the right of Job Details.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. You are considered the "Position Originator". The next individual that must approve this position is your direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Position Originator's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select Save Routing.
 - h. Follow same procedure for your Divisional VP/ Chief.
 - a. If you are a Divisional VP or Chief must enter yourself as:
 1. Position Originator's Supervisor AND
 2. Division VP / Chief.

Interview Exchange Instructions

3. You will have to approve this position two times. Once in your supervisory role and once in your divisional VP / Chief role.
17. Choose “Send for Next Action” button to begin the approval process.
 18. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
 - a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers’ name from the list.
 - d. A pop-up window will appear asking “Are you sure you want to change the Assignee? All the data entered for this task will be lost.”
 - e. Select “Ok”.
 - f. The hiring manager’s name should now appear under the Recommendation To Hire.
 19. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
 - a. Select “Routing” to the right of Recommendation To Hire.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. The hiring manager is considered the “Position Originator”. The next individual that must approve this position is the hiring manager’s direct supervisor.
 - d. Select the pencil icon under “Actions” next to the title “Hiring Manager’s Supervisor”.
 - e. In the “User” box, type the first few letters of your supervisor’s first name.
 - f. Select your supervisor’s name and email from the list.
 - g. Select “Save Routing”.
 - h. If additional individuals must approve the candidate hired, you must then add additional approvers.
 - i. If additional approvals are required, click on “Show Add/Edit Routing”.
 - j. Put the title of the additional approver in the Title Box.
 - k. In the “User” box, type the first few letters of your supervisor’s first name.
 - l. Select your supervisor’s name and email from the list.
 - m. Select “Save Routing”.
 - n. Follow same procedure if additional approvals are needed.
 - 20. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.**

Interview Exchange Instructions

- a. In the Recommendation to Hire section, to the right, click “Actions”.
 - b. Click “Clone Workflow”.
 - c. A pop-up window will appear asking if you are sure you want to clone workflow.
 - d. Click “Ok”.
 - e. Another Recommendation to Hire will appear.
 - f. If more than one additional person is to be hired, repeat. ***NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.***
21. Once approved and all changes made, position will be posted by HR.
22. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address once you set your “Alerts”.

Interview Exchange Instructions

Cloning or duplicating a Staff position that you previously posted through this system:

Cloning a position exactly duplicates a previously approved and posted position. It will duplicate or “clone” the Employee Request Form, Job Details and Physical Demands (if applicable).

***** You can only clone a position you previously posted. You cannot clone a position someone else posted. When cloning a position, it is critical that you review each form in its entirety for accuracy and change previously entered information as necessary. (Ex. Times, dates, job details, task routing, pay supervisor information etc.)**

1. Go to your “Forms” Page.
2. In the “Completed Forms” section, locate the position you wish to clone.
3. Click the “edit” icon next to the position.
4. Click “Actions”.
5. Select “Copy Data to New Form”.
6. Click “Ok”.
7. Select the appropriate department.
8. Category.
9. Title
10. Create Form.
11. Then review all information for accuracy. Then create appropriate approval task routing
12. Send for Next Action.

For Staff positions that have not been previously posted through this system:

To initiate an employee request form for a position that has been previously posted through this system, refer to page 11.

1. **ALWAYS SEARCH HIREZON SYSTEM FOR THE POSITION IN THE JOB LIBRARY FIRST. IF THIS IS A BRAND NEW POSITION OR THE POSITION IS NOT LISTED IN THE JOB TEMPLATE LIBRARY, PROCEED TO INITIATING EMPLOYEE REQUEST FORM IN NEW POSITION SECTION.**
2. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation, compensation range, hourly rate or hourly rate range.
 - c. All job description information. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.

Interview Exchange Instructions

- ii. Grant budget number (xx-xx-xxxx).
3. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
4. Choose the “Forms” icon.
5. Choose “+ Start New Form” icon in upper right corner.
6. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
7. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
8. Template
 - a. Choose – “Position Request”.
 - b. Do not select Position Request (Adjunct) for Staff positions. This should only be used when posting an adjunct position.
9. If this is a **new** position (new meaning not previously entered into this system).
 - a. Select “Use Job Template Library”.
 - b. Select “Staff Template” from the library. You can type it in the search box if you do not see it listed. * Do not worry if the title or position details are not exactly the same as the position you are requesting. You will be able to make changes.
 - c. Scroll to the end and select “Use This Job Template”.
 - d. You will be back at the “Start New Form Screen”.
 - e. Replace “Faculty Template” in title box with the EXACT title of the new position. Do not abbreviate or shorten words in the title. Note: If the position is 100% online/remote please add “Online/Remote” at the end of the position title. (Ex. “Course Builder (Online / Remote)” or “Professor Math (Online/Remote”).
 - f. If position is not 100% online / remote do not place it in the job title. Indicate the percentage remote when updating the position description.
 - g. Click “Create Form”.
10. Choose Employee Request Form (ERF)

Interview Exchange Instructions

- a. Choose ERF w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an “*” are required. You will not be able to proceed without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Choose “Save and Submit”.
 - e. Review ERF for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - f. Choose “Continue”.
 - g. You will then see a “✓” next to ERF.
 - h. Attach any supporting documents such as copies of grants etc.
11. Select title of position in “Job Details” in upper left under Job Details
- a. Do not change Company Description section. This is pre-populated with University approved language and is not to be altered.
 - b. Enter Job Description information. ** Note everything listed in the job description will be in the posted advertisement as written. Please be cautious with wording!
 - i. Some information has been pre-populated. This information should not be deleted.
 - ii. Enter position code immediately after colon. If you do not know correct position code, leave blank. HR will complete.
 - iii. Enter job type immediately after colon. (Example: Full Time or Part Time)
 - iv. Enter standard working hours immediately after colon. (Example: 8:30am-5:00pm or 2:00pm-5:00pm)
 - v. Enter standard work days immediately after colon. (Example: Mon – Fri or Mon, Wed & Fri)
 - vi. Enter position location immediately after colon: (Example: On Ground or Remote)
 - vii. Enter all other job description information after completing steps i-vi. This is the section where you enter Job Summary, Essential duties etc. Please be sure it is in the same format (i.e. font, bulleted etc.)
 - viii. If position is 1%-100% remote, please include this in the job description to ensure applicants are aware.
 - c. Enter the Job Summary information after colon.
 - d. Enter Essential functions use bulleted format to enter each essential function on a new line.
 - e. Enter Requirements. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.

Interview Exchange Instructions

- i. Some requirements have been pre-populated. This information should not be deleted. These pre-populated requirements should be listed LAST.
 - ii. To add requirements to the list, place your cursor after the first bullet point and hit “enter”. Then type your first requirement, hitting enter after each new requirement.
 - f. Do not change any information in Additional Information section. This is prepopulated with desired University language and should not be altered.
 - g. Do not enter anything in the Application Instruction section. HR will populate with desired University language.
 - h. Do not enter any information in the Internal Description section.
 - i. In the Optional Field Box
 - i. Select appropriate Job Type from drop down menu.
 - ii. Select appropriate Job Category from drop down menu.
 - j. Choose “Save Job Details” when finished.
 - k. Review job details for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - l. Choose close in pop up window once you are satisfied all information is accurate.
 - m. You will then see a “✓” next to the position title under job details.
12. Choose Physical Demands Chart.
- a. Choose Physical Demands Chart w/ blank box next to it.
 - b. Complete the Physical Demands Chart. This is required, you will not be able to proceed without completing this chart.
 - c. Select “Save and Submit”.
 - d. Review Physical Demands Chart for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - e. Choose “Continue”.
 - f. You will then see a “✓” next to Physical Demands Chart.
13. Attach any supporting documents such as copies of grants, etc.
14. OPTIONAL: You may enter information or notes in the “Start a Discussion” box.
- a. The information entered will be seen by the approvers.
 - b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit “Submit”.

Interview Exchange Instructions

15. You must now set up the approval path for this position. This is the electronic path or routing for position approval.
- a. Select "Routing" in the upper right corner, to the right of Job Details.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. You are considered the "Position Originator". The next individual that must approve this position is your direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Position Originator's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select "Save Routing".
 - h. Follow same procedure for your Divisional VP/ Chief.
 - i. If you are a Divisional VP or Chief must enter yourself as:
 1. Position Originator's Supervisor AND
 2. Division VP / Chief.
 3. You will have to approve this position two times. Once in your supervisory role and once in your divisional VP / Chief role.
 - j. Once you have completed the routing, click on the "x" in the upper right of the task routing pop-up window to exit.
16. Choose "Send for Next Action" button to begin the approval process.
17. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
- a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers' name from the list.
 - d. A pop-up window will appear asking "Are you sure you want to change the Assignee? All the data entered for this task will be lost."
 - e. Select "Ok".
 - f. The hiring manager's name should now appear under the Recommendation To Hire.
18. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
- a. Select "Routing" to the right of Recommendation To Hire.

Interview Exchange Instructions

- b. You will notice some individuals are pre-populated and cannot be changed.
- c. The hiring manager is considered the “Position Originator”. The next individual that must approve this position is the hiring manager’s direct supervisor.
- d. Select the pencil icon under “Actions” next to the title “Hiring Manager’s Supervisor”.
- e. In the “User” box, type the first few letters of your supervisor’s first name.
- f. Select your supervisor’s name and email from the list.
- g. Select “Save Routing”.
- h. If additional individuals must approve the candidate hired, you must then add additional approvers. If not, skip to step 19.
- i. If additional approvals are required, click on “Show Add/Edit Routing”.
- j. Put the title of the additional approver in the Title Box.
- k. In the “User” box, type the first few letters of your supervisor’s first name.
- l. Select your supervisor’s name and email from the list.
- m. Select “Save Routing”.
- n. Follow same procedure if additional approvals are needed.

19. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.

- a. In the Recommendation to Hire section, to the right, click “Actions”.
- b. Click “Clone Workflow”.
- c. A pop-up window will appear asking if you are sure you want to clone workflow.
- d. Click “Ok”.
- e. Another Recommendation to Hire will appear.
- f. If more than one additional person is to be hired, repeat. **NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.**

20. Once approved and all changes made, position will be posted by HR.

21. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address once you set your “Alerts”.

Interview Exchange Instructions

Initiating Employee Request Form for Adjunct Positions

For Adjunct positions that have been previously posted through this system only:

To initiate an employee request form for a position that has not been previously posted through this system, refer to page 25.

Use the Adjunct Employee Request form for the following types of contracted employees:

- ⇒ Teaching Adjunct (not Faculty position)
- ⇒ SME (TAWC)
- ⇒ Lead Adjunct
- ⇒ Directed Study
- ⇒ Supervisor

1. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation or compensation range.
 - c. All job description information, for example course name, course number, course dates, course times etc. and course catalog description. If the position is not a teaching position, you must know the essential duties. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.
 - ii. Grant budget number (xx-xx-xxxx).
2. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
3. Choose the “Forms” icon.
4. Choose “+ Start New Form” icon in upper right corner.
5. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
6. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
7. Template

Interview Exchange Instructions

- a. Choose – “Position Request (Adjunct)”.
8. **ALWAYS SEARCH HIREZON SYSTEM FOR THE POSITION IN THE JOB LIBRARY FIRST. IF THIS IS A BRAND NEW POSITION OR THE POSITION IS NOT LISTED IN THE JOB TEMPLATE LIBRARY, PROCEED TO INITIATING EMPLOYEE REQUEST FORM IN NEW POSITION SECTION.**
9. If this position has been previously entered into the system, search the job template library to access previously posted position with the same title. This may save you significant data entry while allowing you to make any necessary changes to the previous position. To search the job template library:
 - a. Choose “Use Job Template”.
 - b. Select the previously posted position with same title.
 - c. If this is the position you would like to use as a “template”, select “Use This Job Template” located at end of the job template. * Do not worry if position details are not exactly the same. You will be able to make changes in the next step.
 - d. The Job Title should appear in the Title section. (The title can be changed but you must use adjunct title naming standard as follows:
 - i. Adjunct Title Naming Standard: (All adjunct positions must follow this standard)
 - ii. Do not abbreviate any words in the title.
 1. Adjunct Professor, Course Title (Course #)
 - a. Example: “Adjunct Professor, Math101 (MAT101)”
 2. Online Adjunct Professor, Course Title (Course #)
 - a. Example: “Online Adjunct Professor, Math101 (MAT101)”
 - e. If the title is not changing AND the current title meets the adjunct naming standards above, skip this step. If the initial title did not follow the approved naming standard, change it to conform to naming standards. Do not abbreviate any words in the title.
 - f. Choose “Create Form”.
10. If it is not the position you would like to use as a template, close window and select another position from the library.
11. Choose Employee Request Form.
 - a. Choose ERF w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an “*” are required. You will not be able to proceed without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Choose “Continue”.

Interview Exchange Instructions

12. You will then see a “✓” next to ERF.
13. Select title of position in “Job Details” in upper left under Job Details.
14. Make all necessary changes to the position, course description, essential duties, job requirements etc. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - i. Some information has been pre-populated.
 - ii. Enter position code immediately after colon. If you do not know correct position code, leave blank. HR will complete.
 - iii. Job type has been pre-populated as “PT Adjunct”. If this position is something other than PT Adjunct, you may change it otherwise leave as is.
 - iv. Enter Traditional On Ground or Online position immediately after colon. (Example: OnGround or Remote)
 - v. Enter Undergraduate or Graduate information immediately after colon. (Example: Undergraduate or Graduate)
 - vi. Enter date classes are scheduled to begin immediately after colon. (Example: September 25, 2017)
 - vii. Enter class schedule immediately after colon. (Example: M,W,F or T,T)
 - viii. Enter duration of class immediately after colon. (Example: 6 weeks, 8 week or 15 weeks)
 - ix. Enter time of class immediately after colon. (Example: 7:30am -12:00pm or 8:00am – 1:00pm)
 - x. Enter basic course description next after completing steps i-xi. Typically the job description information is the course description cut and pasted copied from course catalog.
 - xi. Change description of duties (if applicable).
 - xii. Change course description (if applicable). Typically this information comes from course catalog. This can be cut and pasted from course catalog.
 - xiii. If position is 1%-100% remote, please include this in the job description to ensure applicants are aware.
15. In the Requirements section provide the following information:
 - a. Degree requirements for position (Bachelor’s, Master’s, PhD etc.).
 - b. Previous teaching experience: (Ex. Required, Preferred or N/A)
 - c. Any additional information you’d like potential applicants to know.

Interview Exchange Instructions

16. Make all necessary changes to the position, job requirements, essential duties etc. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - a. If the position is 1%-100% remote indicate this in the job description.
 - b. Once all job changes are made choose "Save Job Details" at end.
 - c. Review for accuracy. If no changes are needed select "Close".
 - d. If changes are needed select "Edit" and make changes.
 - e. Choose "Close" in the pop-up window.
 - f. After choosing "Close" a "✓" will appear next to the position title under Job Details.
17. Attach any supporting documents such as copies of grants etc.
18. OPTIONAL: You may enter information or notes in the "Start a Discussion" box.
 - a. The information entered will be seen by the approvers.
 - b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit "Submit".
19. Choose "Send for Next Action" button to begin the approval process.
20. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
 - a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers' name from the list.
 - d. A pop-up window will appear asking "Are you sure you want to change the Assignee? All the data entered for this task will be lost."
 - e. Select "Ok".
 - f. The hiring manager's name should now appear under the Recommendation To Hire.
21. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
 - a. Select "Routing" to the right of Recommendation To Hire.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. The hiring manager is considered the "Position Originator". The next individual that must approve this position is the hiring manager's direct supervisor.

Interview Exchange Instructions

- d. Select the pencil icon under “Actions” next to the title “Hiring Manager’s Supervisor”.
- e. In the “User” box, type the first few letters of your supervisor’s first name.
- f. Select your supervisor’s name and email from the list.
- g. Select “Save Routing”.
- h. If additional individuals must approve the candidate hired, you must then add additional approvers. If not, skip to step 22.
- i. If additional approvals are required, click on “Show Add/Edit Routing”.
- j. Put the title of the additional approver in the Title Box.
- k. In the “User” box, type the first few letters of your supervisor’s first name.
- l. Select your supervisor’s name and email from the list.
- m. Select “Save Routing”.
- n. Follow same procedure if additional approvals are needed.

22. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.

- a. In the Recommendation to Hire section, to the right, click “Actions”.
- b. Click “Clone Workflow”.
- c. A pop-up window will appear asking if you are sure you want to clone workflow.
- d. Click “Ok”.
- e. Another Recommendation to Hire will appear.
- f. If more than one additional person is to be hired, repeat. **NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.**

23. Once approved and all changes made, position will be posted by HR.

24. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address.

Interview Exchange Instructions

Cloning or duplicating an Adjunct position that you previously posted through this system:

Cloning a position exactly duplicates a previously approved and posted position. It will duplicate or “clone” the Employee Request Form, Job Details and Physical Demands (if applicable).

***** You can only clone a position you previously posted. You cannot clone a position someone else posted. When cloning a position, it is critical that you review each form in its entirety for accuracy and change previously entered information as necessary. (Ex. Times, dates, job details, task routing, pay supervisor information etc.)**

1. Go to your “Forms” Page.
2. In the “Completed Forms” section, locate the position you wish to clone.
3. Click the “edit” icon next to the position.
4. Click “Actions”.
5. Select “Copy Data to New Form”.
6. Click “Ok”.
7. Select the appropriate department.
8. Category.
9. Title
10. Create Form.
11. Then review all information for accuracy. Then select appropriate approval task routing
12. Send for Next Action.

For Adjunct positions that have not been previously posted through this system:

To initiate an employee request form for a position that has not been previously posted through this system, refer to page 21.

Use the Adjunct Employee Request form for the following types of contracted employees:

- ⇒ Teaching Adjunct (not Faculty position)
- ⇒ SME (TAWC)
- ⇒ Lead Adjunct
- ⇒ Directed Study
- ⇒ Supervisor

1. Before initiating the process to fill a new or vacant position, you will need the following information:
 - a. Know the department budget number this position will be charged to (xx-xx-xxxx).
 - b. Compensation or compensation range.

Interview Exchange Instructions

- c. All job description information, for example course name, course number, course dates, course times etc. and course catalog description. If the position is not a teaching position, you must know the essential duties. You may cut and paste from a word document and/or you can make changes to the previously posted position information as needed.
 - d. If the position is grant funded, you will need to include the following information:
 - i. Start and end date of grant.
 - ii. Grant budget number (xx-xx-xxxx).
2. Log into Hirezon / InterviewExchange portal (see logging in to your Hirezon/Interview Exchange Account section.
 3. Choose the “Forms” icon.
 4. Choose “+ Start New Form” icon in upper right corner.
 5. Choose the proper department from the drop down listing.
 - a. This should be the department number in which the employee will be assigned.
 - b. If the position is shared between multiple departments, select the primary department.
 - c. If you do not see the appropriate department number in the drop down listing, please contact Human Resources in order to be given access. **DO NOT select an incorrect department number.**
 - d. Verify correct department number was selected by clicking “ok” in the pop up box.
 6. Category
 - a. Choose – “Recruitment”.
 - b. Personnel Records category is only to be used by HR.
 7. Template
 - a. Choose – “Position Request (Adjunct)”.
 - b. Do not select “Position Request” this is only for Staff and Faculty positions.
 8. If this is a **new** position (new meaning not previously entered into this system).
 - a. Select “Use Job Template Library”.
 - b. Select “Adjunct Template” from the library. You can type it in the search job templates box if you do not see it listed. *
 - c. The adjunct template will open in a separate pop up box.
 - d. Scroll to the end and select “Use This Job Template”.
 - e. You will be back at the “Start New Form Screen”.
 - f. The title box will be blank.
 - g. Enter the title using adjunct title naming standard as follows:
 - i. Adjunct Title Naming Standard: (All adjunct positions must follow this standard)

Interview Exchange Instructions

- ii. Do not abbreviate any words in the title.
 - 1. Adjunct Professor, Course Title (Course #)
 - a. Example: “Adjunct Professor, Math101 (MAT101)”
 - 2. Online Adjunct Professor, Course Title (Course #)
 - a. Example: “Online Adjunct Professor, Math101 (MAT101)”
 - h. If position is not 100% online / remote do not place it in the job title. Indicate the percentage remote when updating the position description.
 - i. Click “Create Form”.
9. Choose Employee Request Form (ERF)
- a. Choose ERF w/ blank box next to it.
 - b. Complete ERF in detail. Fields with an “*” are required. You will not be able to proceed without completing these fields.
 - c. Be sure to identify the hiring manager and all members of the search committee for this position.
 - d. Choose “Save and Submit”.
 - e. Review ERF for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
 - f. Choose “Continue”.
 - g. You will see a “✓” next to ERF.
10. Select title of position in “Job Details” in upper left under Job Details.
- a. Do not change Company Description section. This is pre-populated with University approved language and is not to be altered.
 - b. Enter Job Description information. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
 - i. Some information has been pre-populated.
 - ii. Enter position code immediately after colon. If you do not know correct position code, leave blank. HR will complete.
 - iii. Job type has been pre-populated as “PT Adjunct”. If this position is something other than PT Adjunct, you may change it otherwise leave as is.
 - iv. Enter Traditional On Ground or Online position immediately after colon. (Example: On Ground or Remote)
 - v. Enter Undergraduate or Graduate information immediately after colon. (Example: Undergraduate or Graduate)

Interview Exchange Instructions

- vi. Enter date classes are scheduled to begin immediately after colon. (Example: September 25, 2017)
 - vii. Enter class schedule immediately after colon. (Example: M,W,F or T,T)
 - viii. Enter duration of class immediately after colon. (Example: 6 weeks, 8 week or 15 weeks)
 - ix. Enter time of class immediately after colon. (Example: 7:30am -12:00pm or 8:00am – 1:00pm)
 - x. Enter basic course description next after completing steps i-ix. Typically the job description information is the course description cut and pasted copied from course catalog.
 - xi. If position is 1%-100% remote, please include this in the job description to ensure applicants are aware.
- c. Enter Requirements. ** Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the final job description at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
- i. Some requirements have been pre-populated. This information should not be deleted.
 - ii. To add requirements to the list, place your cursor before the Ability to adhere to University policies and procedures bullet point and hit “enter”. Then type your additional requirement, hitting enter after each new requirement.
- d. Do not change any information in Additional Information section. This is prepopulated with desired University language and should not be altered.
- e. Do not enter anything in the Application Instruction section. HR will populate with desired University language.
- f. Do not enter any information in the Internal Description section.
- g. In the Optional Field Box.
- i. Select Adjunct in Job Type from drop down menu.
 - ii. Select Adjunct in Job Category from drop down menu.
- h. Choose “Save Job Details” when finished.
- i. Review job details for accuracy. If changes should be made, choose “Edit” and make necessary corrections.
- j. Choose close in pop up window once you are satisfied all information is accurate.
- k. You will see a “✓” next to the position title under job details.
11. Attach any supporting documents such as copies of grants, etc.
12. OPTIONAL: You may enter information or notes in the “Start a Discussion” box.
- a. The information entered will be seen by the approvers.

Interview Exchange Instructions

- b. This can be used to provide additional information / details or it can be skipped. It is not required.
 - c. Once you have entered your discussion notes, hit "Submit".
13. Choose "Send for Next Action" button to begin the approval process.
14. If the individual initiating this form (you) is **NOT** the hiring manager for the position, you must remove your name from the Recommendation To Hire and add the name of the hiring manager.
- a. Click on your name under the Recommendation To Hire section.
 - b. A Task Assignee pop-up window will appear.
 - c. Type in the first few letters of the hiring managers first (or last) name. A listing of individuals will appear. Select the hiring managers' name from the list.
 - d. A pop-up window will appear asking "Are you sure you want to change the Assignee? All the data entered for this task will be lost."
 - e. Select "Ok".
 - f. The hiring manager's name should now appear under the Recommendation To Hire.
15. You must now set up the approval path for the Recommendation to Hire. This is the electronic path or routing for approval to hire a candidate.
- a. Select "Routing" to the right of Recommendation To Hire.
 - b. You will notice some individuals are pre-populated and cannot be changed.
 - c. The hiring manager is considered the "Position Originator". The next individual that must approve this position is the hiring manager's direct supervisor.
 - d. Select the pencil icon under "Actions" next to the title "Hiring Manager's Supervisor".
 - e. In the "User" box, type the first few letters of your supervisor's first name.
 - f. Select your supervisor's name and email from the list.
 - g. Select "Save Routing".
 - h. If additional individuals must approve the candidate hired, you must then add additional approvers. If not, skip to step 17.
 - i. If additional approvals are required, click on "Show Add/Edit Routing".
 - j. Put the title of the additional approver in the Title Box.
 - k. In the "User" box, type the first few letters of your supervisor's first name.
 - l. Select your supervisor's name and email from the list.
 - m. Select "Save Routing".
 - n. Follow same procedure if additional approvals are needed.

Interview Exchange Instructions

- 16. This step is only to be followed if more than one individual will be hired for this position. If hiring only one person, skip this step.**
- a. In the Recommendation to Hire section, to the right, click “Actions”.
 - b. Click “Clone Workflow”.
 - c. A pop-up window will appear asking if you are sure you want to clone workflow.
 - d. Click “Ok”.
 - e. Another Recommendation to Hire will appear.
 - f. If more than one additional person is to be hired, repeat. **NOTE: The Clone Workflow option is only available in the first Recommendation to Hire section. All clones must be initiated here.**
17. Once approved and all changes made, position will be posted by HR.
18. You will receive notification of all new applicants at the conclusion of each day to your Bay Path email address once you set your “Alerts”.

Approval of Position Request

1. If you are an approver for a position, you will receive an email invitation asking you to review and approve the position request information.
2. You can log into your Hirezon account directly from this email to approve by clicking on the “account” link in the email.
3. After logging on you can select the “Assigned to Me” which is at the top of the page.
4. In the “Waiting for Task Approval” section, select the position you would like to review/approve by clicking on the edit icon next to the position title.
5. Under Employee Request Form, select Employee Request Form and review all the information. If it’s accurate select “Save & Submit”.
6. You now see a “✓” next to ERF.
7. Under Job Details, select the position title and review the job description details. If they are accurate, select “Close”.
 - a. If changes are required in this section, please proceed to “Denial of Position Request” section.
8. You now see a “✓” next to Job Details.
9. Then select “Continue”.
 - a. If changes are required in this section, please see Denial of Position Request section.

Interview Exchange Instructions

10. For Faculty and Staff positions with a Physical Demands Chart: Select the Physical Demands icon and review the physical demands. If they are accurate, select "Save & Submit". Adjunct positions do not require a Physical Demands Chart. If no Physical Demands Chart, proceed to step 13.
11. If no changes are required for the Physical Demands, select "Continue".
 - a. If changes are required in this section, please proceed to Denial of Position Request section.
12. You now see a "✓" next to Physical Demands.
13. In the comments section please indicate your approval, then select "Approve".
14. The position request will be sent to the next approver.

Interview Exchange Instructions

Changing Information In Position Request

1. Based on your privileges within the Hirezon system, you may have the ability to change information in the job description details or employee request form. If you have the “edit” capability, you will be presented with an icon allowing you to alter the job details and/or employee request form. **ONLY MAKE CHANGES IF YOU ARE 100% SURE THE CHANGES ARE ACCURATE AND APPROVED.** If you are not 100% sure, deny the position request by following the Denial of Position Request section.
2. If you are an approver for a position, you will receive an email invitation asking you to review and approve the position request information.
3. You can log into your Hirezon account directly from this email to approve by clicking on the “account” link in the email.
4. After logging on you can select the “Assigned to Me” which is at the top of the page.
5. In the “Waiting for Task Approval” section, select the position you would like to approve by clicking on the edit icon next to the position title.
6. Select the job details icon and review the job description details. If changes are needed (and you have proper authorization) you may change the job description by selecting “edit”. Most will not have the authority to change information. If changes are required, it is highly recommended you deny the position request, see Denial of Position Request” section.
7. Make the appropriate changes in the appropriate sections. Note everything listed in the job description will be in the posted advertisement. It is your responsibility to review the job description information at this point in the process for accuracy. Again, everything listed in the job description will be in the posted advertisement.
8. When finished, select “Save Job Details”.
9. Select “Close”.
10. Next select the employee request form and review. Make changes as necessary to ERF.
11. Select “Save & Submit”.
12. Then select “Continue”.
13. You will see a “✓” next to ERF.
- 14. BE SURE TO IDENTIFY THE CHANGES MADE IN THE COMMENTS SECTION.**
15. If the changes are insignificant and should not hold up posting process, select “Approve”.
16. If changes are significant and the originator should be aware of these changes, choose “Review & Resend”. Originator of request will receive an email with your comments and be able to view your changes. If in agreement, they can republish the request with updated information for approval again.

Interview Exchange Instructions

Denial of Position Request

1. If you are an approver for a position, you will receive an email invitation asking you to review and approve the position request information.
2. You can log into your Hirezon account directly from this email to approve by clicking on the “account” link in the email.
3. After logging on you can select the “Assigned to Me” which is at the top of the page.
4. In the “Waiting for Task Approval” section, select the position you would like to approve by clicking on the edit icon next to the position title.
5. Select the job details icon and review the job description details and employee request form. If there is a mistake or mistakes proceed to step 6.
6. If you are an approver for a position and the information in the job description details, employee request form or physical demands chart is incorrect, you must deny the request.
7. In the comments section please indicate the reason for your denial so the originator can correct the issue(s) and begin the approval process again. After entering your comments, choose “Review and Resend” and the request will be sent back to the originator. Your comments will appear in the Task Routing History.
8. Originator will receive an email with your comments and will make necessary changes or reach out to you for additional information.
9. Once necessary corrections are made position must be republished to start approval process again. See Republishing Position Request after Denial section.

Interview Exchange Instructions

Updating Position or Employee Request Form after Denial

1. If you are the Originator for a denied position, you will receive an email indicating a position has been denied.
2. You can log into your Hirezon account directly from this email to approve by clicking on the “account” link in the email.
3. After logging into your account, select the “Forms” tab.
4. In the “In Progress” box, locate the position you will be making edits to.
5. Click on the “edit” icon located to the left of the position title.
6. Choose “Task Routing” to the right of Employee Request Form.
7. A pop up window will appear. In the lower left corner of the pop up window, choose “Show Routing History”.
8. The denied approval routing will appear in the lower portion of the pop up window.
9. In the Action column, look for the word “Denied”. It will be next to the individual that denied the position.
10. The individual that denied the position should have added notes indicating the reason(s) they denied the request. If there are numerous items which need correcting, print the screen so you don’t have to remember them all.
11. Choose “Actions” icon on right side of screen (to the right of Employee Request Form).
12. Choose “Mark as Incomplete”.
13. A pop up message will appear, click “ok”.
14. Choose “Actions” icon again (to the right of Employee Request Form).
15. Choose “Republish”.
16. A pop up message will appear, click “ok”.
17. Make necessary corrections to ERF, job details or physical demands.
18. Select “Send for Next Action” and the updated position will be sent for approval(s) again.

Interview Exchange Instructions

Position Recruiting: Hiring Manager Only (No Search Committee)

1. Once a position has been posted the hiring manager will receive an email indicating they have been invited to review a job posting. In order to receive notification when new applicants apply, you must activate “Alerts”.
2. Click on the link in the email to set-up your notification alert preferences. You will be taken to the alerts screen for this position

E-mail Alerts
Faculty Template

[Return to Shortlist](#)

Alert Options

Alert me for all new candidates
 Qualified candidates only

Send alerts:

[Policy](#) | [Terms of Use](#) | [Contact Us](#)

3. Select the radio button next to “Alert me for all new candidates”.
4. In the Send Alerts drop down menu select the frequency in which you would like to receive alerts. “Daily” is recommended.
 - a. At the conclusion of each day you will receive notification indicating that new resumes were received. (The position title will be in the subject line of the email just in case you are involved in multiple searches.)
5. Click “Submit”.
6. You can log into your account via a link in the email to view the new resumes. Click the link and enter your log in credentials.
7. You will be directed to the main page.
8. Select the Applicant Tracking icon.
9. You will then be at your “Manage Jobs” page. This page should list all of the jobs you are a part of either as the hiring manager or search committee member.
10. Select the position title from the listing of your jobs to review resumes received.

Interview Exchange Instructions

12. You can review each resume, application information and additional documents provided by the applicant by clicking on the name of the candidate.
 - a. Note: You can sort the candidates based on: Name, Date received, or score based on COREquisite questions asked during the application process.
13. After reviewing each candidate's information, and throughout the recruitment process for this position, you can move them to the appropriate recruitment "folder". (Ex. If an applicant is interviewed by phone, then brought in for an in person interview, then a 2nd in person interview, that applicant should be moved into three (3) different folders at the time the applicant progressed in the search.) The system will track the movement from folder-to-folder. (Note: moving a candidate into or out of a recruitment folder **will not** generate any automated notification to the candidate.) Below are the available folders:
 - a. Yes
 - b. No
 - c. Maybe
 - d. Committee Review (only used when search committee is involved)
 - e. Initial Phone Interview
 - f. In Person / Remote Interview
 - g. 2nd In Person / Remote Interview
 - h. Finalist Interviews
 - i. Job Offer Extended
 - j. Future Consideration (Perhaps this candidate was the 2nd place finalist or would be good for another position, place them here)
14. You should move candidate to appropriate folder based on where candidate is in the recruitment process up to and including the "Hired" folder.
15. Any and all email communication between you and the candidate should go through the system. You can send emails directly from the recruitment section in several ways:
 - a. You may send the candidate a standard type email by using the pre-populated email templates:
 - i. In the contact information box at the top of the candidate page, in the "move to" box, select the appropriate email you would like to send by selecting "Send Email" and "Submit"
 - ii. Select "Sample Email Templates"
 - iii. Review the samples and select the appropriate email template. You can edit these emails but we suggest limited editing as the wording has been approved by the University.
 - iv. Add a subject title for your email

Interview Exchange Instructions

- v. Select "Preview" to review the email
 - vi. If the email requires a response please select the radio button next to the "This is a follow-up email and requires a response". If it doesn't require a response select the no response required radio button.
 - vii. When you are satisfied with the content of the email, place a "✓" next to the statement "Place a check mark when you are ready to send"
 - viii. Then select "Send Email"
- b. You may also communicate with the candidate by utilizing the "Follow-Up Questions" section at the end of the candidate's page. There are email templates in this section.
- i. Type your email in the Ask this candidate a question box
 - ii. Click "Preview". Ensure all spelling and grammar is accurate
 - iii. Click "Send Question"
16. At the conclusion of the search, all candidates that were interviewed either by phone or in-person, should remain in the appropriate folder. Do not move them to the No folder if they were not selected. HR will send letters to all applicants at the conclusion of the search notifying them the position was filled. The folder they are in determines the wording of letter sent. (ex. An applicant in the "Finalist" folder will receive a different letter than someone in the "No" folder.
- a. EXCEPTION: If a candidate verbally withdraws from the search after a phone or in-person interview, they should be moved to the "Withdrawn" folder. No letters are sent to a candidate that withdraws.
17. For those candidates you did not hire whether based on phone screen, or interviews (whether in-person, telephone or remote interviews), you must give them a "Disposition code" located under the candidate report fields section.
- a. Select the appropriate disposition code for non-selection from the drop down menu
 - b. If none of the drop down menu items fit your reason for non-selection, select "Other" and enter your reasoning in the justification box.
18. All candidates that applied for the position, whether they were interviewed or not, will be notified once the position has been filled.

Interview Exchange Instructions

Position Recruiting: With Search Committee

1. Once a position has been posted the hiring manager and all members of the search committee will receive an email indicating they have been invited to review a job posting. In order to receive notification when new applicants apply, you must activate “Alerts”.
2. Click on the link in the email to set-up your notification alert preferences. You will be taken to the alerts screen for this position

The screenshot shows a web interface for configuring email alerts. The main heading is "E-mail Alerts" with a subtitle "Faculty Template". A link "Return to Shortlist" is located in the top right corner. Under the "Alert Options" section, there are two radio buttons: "Alert me for all new candidates" (which is selected) and "Qualified candidates only". Below this is a "Send alerts:" dropdown menu currently set to "Immediately". At the bottom of the form are "Submit" and "Cancel" buttons. A footer at the very bottom of the page contains links for "Policy", "Terms of Use", and "Contact Us".

3. Select the radio button next to “Alert me for all new candidates”.
4. In the Send Alerts drop down menu select the frequency in which you would like to receive alerts. “Daily” is recommended.
 - a. At the conclusion of each day you will receive notification indicating that new resumes were received. (The position title will be in the subject line of the email just in case you are involved in multiple searches.)
5. Click “Submit”.
6. You can log into your account via a link in the email to view the new resumes. Click the link and enter your log in credentials.
7. You will be directed to the main page.
8. Select the Applicant Tracking icon.
9. You will then be at your “Manage Jobs” page. This page should list all of the jobs you are a part of either as the hiring manager or search committee member.

Interview Exchange Instructions

11. Select the position title from the listing of your jobs to review resumes received.
12. Note: You can communicate with one or more members of the search committee during the recruitment process utilizing the “Reviewer Notes” tab in the position’s tool bar.
 - a. After selecting “Reviewer Notes” in the toolbar, scroll to the “Add Job Notes” area.
 - b. Type in the message / information you would like to send to the search committee members.
 - c. Attach any supporting documents, if applicable.
 - d. In the “Type” drop down menu select “Job Note”.
 - e. In the “Notify” drop down menu select either “All” or “Selected”
 - i. **All-** will send all members of the search committee AND HR notification that a note has been added to the position for review.
 - ii. **Selected-** will send all selected members of the search committee notification that a note has been added to the position for review.
13. The hiring manager and search committee can review each resume, application information and additional documents provided by the applicant by clicking on the name of the candidate.
 - a. Note: You can sort the candidates based on: Name, Date received, or score based on COREquisite questions asked during the application process.
14. The hiring manager and members of the search committee can review the applicants and add notes for the other members of the search committee in the Notes for Review Team section such as:
 - a. Strong candidate.
 - b. Lacking education.
 - c. Looks like a good candidate I think we should interview.
 - d. Basically any notes you would make as if you were sitting in the same room with the other committee members.
 - e. Note: Any notes become part of the permanent record for this position.
15. Once consensus has been made on the candidates to move forward in the recruitment process (i.e. phone interviews, interviews, final interviews etc.) interviews can commence.
16. Throughout the recruitment process, the hiring manager will move applicants to the appropriate recruitment “folder”. (Ex. If an applicant is interviewed by phone, then brought in for an in person interview, then a 2nd in person interview, that applicant should be moved into three (3) different folders at the time the applicant progressed in the search.) The system will track the movement from folder-to-folder. (Note: moving a candidate into or out of a recruitment folder **will not** generate any automated notification to the candidate.) Note: Only

Interview Exchange Instructions

the hiring manager can move candidates into various recruitment folders and communicate directly with the candidates through the system. Below are the available folders:

- a. Yes
- b. No
- c. Maybe
- d. Committee Review (only used when search committee is involved)
- e. Initial Phone Interview
- f. In Person / Remote Interview
- g. 2nd In Person / Remote Interview
- h. Finalist Interviews
- i. Job Offer Extended
- j. Future Consideration (Perhaps this candidate was the 2nd place finalist or would be good for another position, place them here)

17. You should move candidate to appropriate folder based on where candidate is in the recruitment process up to and including the “Hired” folder.

18. Any and all email communication between BPU and the candidate should go through the system. The hiring manager can send emails directly from the recruitment section in several ways:

- a. You may send the candidate a standard type email by using the pre-populated email templates:
 - i. In the contact information box at the top of the candidate page, in the “move to” box, select the appropriate email you would like to send by selecting “Send Email” and “Submit”
 - ii. Select “Sample Email Templates”
 - iii. Review the samples and select the appropriate email template. You can edit these emails but we suggest limited editing as the wording has been approved by the University.
 - iv. Add a subject title for your email
 - v. Select “Preview” to review the email
 - vi. If the email requires a response please select the radio button next to the “This is a follow-up email and requires a response”. If it doesn’t require a response select the no response required radio button.
 - vii. When you are satisfied with the content of the email, place a “✓” next to the statement “Place a check mark when you are ready to send”
 - viii. Then select “Send Email”

Interview Exchange Instructions

- b. The hiring manager may also communicate with the candidate by utilizing the “Follow-Up Questions” section at the end of the candidate’s page.
 - i. Type your email in the Ask this candidate a question box
 - ii. Click “Preview”. Ensure all spelling and grammar is accurate
 - iii. Click “Send Question”
19. At the conclusion of the search, all candidates that were interviewed either by phone or in-person, should remain in the appropriate folder. Do not move them to the No folder if they were not selected. HR will send letters to all applicants at the conclusion of the search notifying them the position was filled. The folder they are in determines the wording of letter sent. (ex. An applicant in the “Finalist” folder will receive a different letter than someone in the “No” folder.
 - a. EXCEPTION: If a candidate verbally withdraws from the search after a phone or in-person interview, they should be moved to the “Withdrawn” folder. No letters are sent to a candidate that withdraws.
20. For those candidates that were interviewed whether by phone, in-person or remote interviews, the hiring manager must give them a “Disposition code” located under the candidate report fields section.
 - a. Select the appropriate disposition code for non-selection from the drop down menu
 - b. If none of the drop down menu items fit your reason for non-selection, select “Other” and enter your reasoning in the justification box.
21. All candidates that applied for the position, whether they were interviewed or not, will be notified once the position has been filled.

Recommending Candidate for Hire

1. After all final interviews are conducted, once the hiring manager / search committee members have identified the candidate they would like to hire, they must put forth a recommendation to hire.
2. The hiring manager must log into the system and click on the candidate page of the applicant they wish to hire.
3. In the upper right hand corner, click the recommendation form link, under the Application Details section.
4. A pop up window will appear with a message “Existing forms for {Name of Applicant}.”
5. Click on “Please click here to complete this form for {Name of Applicant}.”
6. The recommendation to hire form will appear. The candidate’s name should be pre-populated.
7. Complete the remainder of the form with the appropriate information.
8. Click “Send For Next Action”.

Interview Exchange Instructions

9. The form will be sent to those individuals identified to approve the candidate, position and compensation.

Denying or Requesting Additional Information in Recommending to Hire Form

1. A recommendation to hire form is completed by the hiring manager once the recruitment process has completed and the search committee has identified a candidate they would like to extend an offer to.
2. The hiring manager completes the recommendation to hire form (See Recommending Candidate For Hire section).
3. If you are one of the individuals responsible for reviewing and approving a recommendation to hire form, you will receive an email asking you to review and approve. Once this form is approved by all the required individuals, an offer of employment can be made to the candidate (In the case of staff positions, offers will be made by Human Resources Only).
4. Log in to your Hirezon account using the link contained in the email you received.
5. Go to the “forms” section of the Hirezon system.
6. At the top of the page, click on the bubble “Assigned to Me”.
7. Find the position for which the changes need to be made the “In Progress” box.
8. Select the “edit” icon next to the position title.
9. Review the form. Ensure all information contained on the recommendation to hire form is accurate.
10. If some information is missing, inaccurate or unclear you must deny the form and provide the hiring manager with the necessary information to correct the form.
11. In the discussion box, select “start new discussion” and indicate, in detail, why the form is being denied and the information needed to complete the form correctly.
12. Select “Submit”.
13. Click on the word “Actions” immediately to the right of the Recommendation to Hire.
14. Select “Mark as Incomplete”.
15. Click on the word “Actions” again and select “Republish”.
16. The hiring manager will receive an email, review the discussion information and make the necessary changes.
17. The hiring manager will then complete the recommendation to hire (see recommending candidate for hire section).
18. The recommendation to hire form will then go through the approval process again.

Interview Exchange Instructions

What to do if your Recommendation for Hire is Denied or Missing Information

1. If your recommendation to hire form is not approved, likely there is either missing or inaccurate information.
2. The individual that denied the recommendation to hire form will enter the reason for the denial in the discussion box.
3. That individual will mark the form as incomplete which will generate an email to the original individual that completed the recommendation to hire form.
4. The person that originally completed the recommendation to hire form should review the discussion box for the required changes.
5. Go to the “forms” section of the Hirezon system.
6. At the top of the page, click on the bubble “Assigned to Me”.
7. Find the position for which the changes need to be made the “In Progress” box.
8. Select the “edit” icon next to the position title.
9. Scroll to the bottom and click on “Recommendation Form” below the candidates name and address information.
10. Update the information in the recommendation to hire form.
11. Click “Continue” when all the information is updated and corrected.
12. Select “Send for Next Action”. This will send the form for approval.