

Basic Guidelines / Instructions: Lump Sum Payment Request

1. Log in Hirezon utilizing the following link: [Login \(interviewexchange.com\)](https://interviewexchange.com)
If using SSO: <https://sso.interviewexchange.com/wiu/sso.jsp>
2. Click on the **Forms** tab.
3. Select **Start New Form** tab in the upper right.

Hirezon|Exchange Western Illinois University Dashboard WIU Employee Notifications (1) Help Instructions Logout

0 Created by me 0 Assigned to me 0 Guest Reviews

Search

Incomplete Forms

ID	Title/Name	Originator	Template	Updated
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No Records Found Page 1

Completed Forms

ID	Title/Name	Originator	Template	Updated
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No Records Found Page 1

Published Forms

ID	Title/Name	Originator	Template	Updated
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No Records Found Page 1

Waiting for Form Approval

ID	Title/Name	Originator	Template	Updated
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No Records Found Page 1

Waiting for Task Approval Guest Reviews

4. In the Department drop-down, select the correct department for this position.

A pop-up window will appear asking user to ensure the department selected is accurate. If the department selected is correct, click **OK**. If the department is incorrect, click **Cancel** and update.

Hirezon|Exchange

Start New Form ?

Department: Information Technology

Category: -Select-

Template: Human Resources

Title/Name: ?

Create Form

sysit.interviewexchange.com says

You selected the Information Technology department. Please click OK to confirm this department.

Note: Departments can not be changed after Form creation. An incorrect department may result in a denial during the Form approval process.

If you do not have access to the correct department, *Do Not Proceed*. Contact your Administrator for access to the correct department.

OK Cancel

Select OK if department is correct.

Select Cancel if department is incorrect, then select correct department.

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Note: If the department is wrong and not fixed during this step, you cannot fix it after completing this step, you will be forced to start over.

5. In the Category dropdown, select **Personnel Records**.
6. In the Template dropdown, select the appropriate form, in this case **Lump Sum Payment Request**.

Note: Once you select a form from the template dropdown menu, you can preview the form by clicking on the preview icon next to the form name to ensure you have chosen the correct form. This will be very helpful if you have multiple forms to choose from.

7. Type in the enter the title/name using WIU naming standard for this form in the **Title/Name** field.
Do not abbreviate. Type out in full.
8. Click **Create Form**.

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Start New Form ?

Department: HUMAN RESOURCES

Category: Personnel Records

Template: Lump Sum Payment Request

Title/Name: Jones, John 7.2.25

Create Form

9. You will be directed to the Requisition page.
10. Click on **Lump Sum Payment Request** form.

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Jones, John 7.2.25

Form ID: 275267

Lump Sum Payment Request

WIU Employee

Lump Sum Payment Request

Lump Sum Payment Request

Discussions

Start New Discussion

Send for Next Action

11. The **Lump Sum Payment Request** form will now appear.

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12. Complete the form with all required and pertinent information for this request required by WIU.

Note: All fields with a * are required. You will not be able to submit this form for approval without all the required fields being completed.

13. Once you have completed the Lump Sum Payment Request form, click **Save & Submit**.

14. Review to ensure all the information is accurate.

- If changes need to be made, click **Edit** and make any necessary changes.
- Once all the information is accurate, click **Continue**.

15. Once you click **Continue**, you will be directed to the Requisition page again. You will now see a checkmark ✓ next to Lump Sum Payment Request form.

The screenshot shows the Hirezon Exchange interface for Western Illinois University. The user is John Jones, and the form ID is 275267. The main content area displays a 'Lump Sum Payment Request' form, which is marked as complete with a green checkmark. A black arrow points to the checkmark. Below the form, there is a 'Discussions' section with a 'Start New Discussion' button. At the bottom, there is a 'Send for Next Action' button.

16. You may upload any supporting documents for your request by clicking on “Start New Discussion” and attaching the file.

Your Request is now ready to be sent for appropriate approval. This is accomplished by clicking on **Task Routing** to the right of Lump Sum Payment Request form.

Note: Some approvers may be pre-populated in the approval routing for convenience. All positions must be fully approved before the position is posted.

17. Click on the pencil icon to the right of Hiring Supervisor under **Actions**. After clicking the pencil icon enter the Hiring Supervisor’s name in the **User** field. (start typing last name of the and their name should appear. If the desired approver does not appear, reach out to your HR representative for assistance.

18. Click **Save Routing**.

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Task Routing

Approver Title	User	Status	Actions
Hiring Supervisor			
Vice President/Provost/Dean			
Instructions: (For Provost area only - Dean signature sufficient for payments \$3000 or less)			
HR Employment	Amelia Hartnett	Not Initiated	
	Tamara Irwin	Not Initiated	
Sponsored Projects			
Instructions: For grant or foundation budgets only			
Foundation Accounts			
Instructions: For 538740 or 538730 accounts only			
Vice President for Finance and Administration			
Instructions: (Required for lump sum payments for services beyond 3 months)			
Budget Office	Renee Georges	Not Initiated	
	Dana VanBebber	Not Initiated	
	Bonnie J Elder	Not Initiated	
HR Employment	Amelia Hartnett	Not Initiated	
	Tamara Irwin	Not Initiated	

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

Approver Title: Hiring Supervisor

User: [Redacted]

Permission: [View]

Instructions (optional):

Save Routing Cancel

19. Repeat this process for all required approvers in the Lump Sum Payment Request form section.

Note:

- a. Sponsored Projects approvers are for grant funded positions only. If this is not a grant funded position, leave blank.
- b. Foundation approvers are for 538740 and 538730 accounts only. If this position is not associated with these accounts, leave blank.

20. Click **Send for Next Action** at the bottom of the page to initiate the initial approval process.

21. One-by-one, in linear order, approvers will receive an email to approve.

Note: You can view the status of the approval process at any time by clicking on Task Routing. As each user approves, the request will move to the next approver until all have reviewed and approved.

22. If the Lump Sum Payment Request form is denied for some reason during the approval process, the initiator (originator) of the form will receive a system notification. The individual that denied should include the reason for the denial so the initiator (originator) can update the position accordingly and resubmit the Lump Sum Payment Request form, if applicable.

Note: If denied, once the initiator makes the necessary corrections, the Lump Sum Payment Request form must go through the entire approval process from the beginning. All denial and change information will be stored for audit purposes.