

Basic Guidelines / Instructions:
Lump Sum Student and Graduate Assistantship Payment Request Instructions

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.

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.

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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 Student and Graduate Assistantship 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 Student & Graduate ...

Title/Name: Jones, Sally 7.2.25

Create Form

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

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Jones, Sally 7.2.25

Form ID: 275288

Lump Sum Student & Graduate Assistant Payment Request

WIU Employee

Lump Sum Payment Request

Lump Sum Student & Graduate Assistant Payment Request

Discussions

Start New Discussion

Send for Next Action

11. The **Lump Sum Student and Graduate Assistantship Payment Request** form will now appear.

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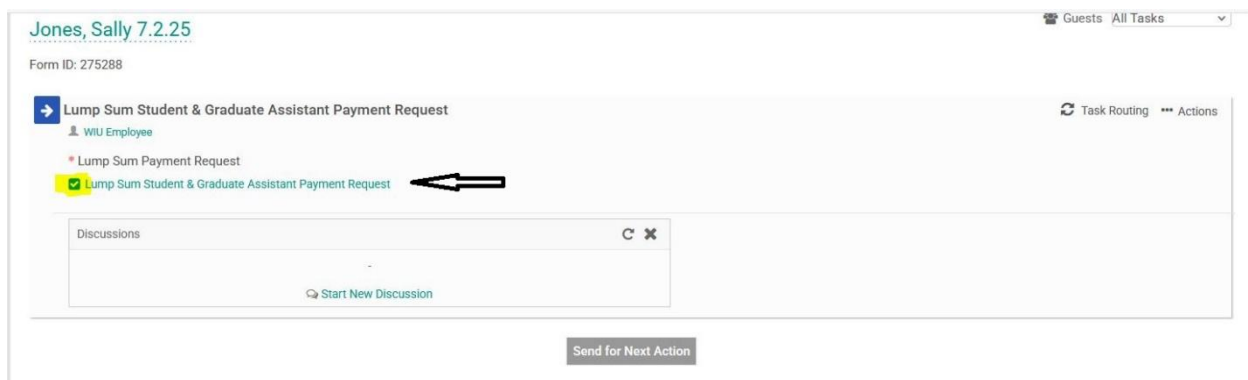
12. Complete the form with all required and pertinent information for this request required by WIU.

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 Student and Graduate Assistantship 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 Student and Graduate Assistantship Payment Request form.



The screenshot shows a web interface for a payment request form. At the top, it says "Jones, Sally 7.2.25" and "Form ID: 275288". Below this, there's a section titled "Lump Sum Student & Graduate Assistant Payment Request" with a "WIU Employee" icon. Underneath, there are two items: "Lump Sum Payment Request" with a red asterisk and "Lump Sum Student & Graduate Assistant Payment Request" with a green checkmark. A black arrow points to the green checkmark. To the right of the form title, there are links for "Task Routing" and "Actions". Below the form title, there's a "Discussions" section with a "Start New Discussion" button. At the bottom of the form, there's a "Send for Next Action" button.

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

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 Student and Graduate Assistantship 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			
Student Employment	Amelia Hartnett	Not Initiated	
Graduate Studies	Sheryl Harty Dana Sistko	Not Initiated	
Sponsored Projects			
Instructions: For grant or foundation budgets only			
Foundation Accounts			
Instructions: For 538740 or 538730 accounts only			
Budget Office	Renee Georges Dana VanBebber Bonnie J Elder	Not Initiated	
Student Employment	Amelia Hartnett	Not Initiated	

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

Approver Title: Hiring Supervisor User: [Redacted] Permission: [Redacted]

Instructions (optional): [Redacted]

Save Routing **Cancel**

Show Routing History

19. Repeat this process for all required approvers in the Lump Sum Student and Graduate Assistantship 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 Student and Graduate Assistantship 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 Student and Graduate Assistantship Payment Request form, if applicable.

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