



## Reviewing and Approving Forms in HireTouch

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The role of the **Approver** in HireTouch is to review the information submitted on a form. After your review, you will determine if the form should be approved, rerouted, or rejected.

As an approver, you have two options for reviewing the forms:

1. Reviewing Forms via the Tasks Tab
2. Reviewing Forms via Email Notification

### *Definitions*

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HireTouch Role Name	Definition
Form Originator	Person who initiated/started the form
Task Recipient	Name of user selected on Approvals page of a form as a reviewer
Form Approver	Name of user selected on Approvals page of a form as a reviewer

## Option 1: Reviewing Forms via the Tasks Tab

One option for reviewing forms is through the **Tasks** tab in HireTouch. When you are selected as an approver for a form, a task is automatically created for you.

1. Login to the [HireTouch Administrative Application](#).



**NOTE:** For more information on accessing HireTouch, refer to the [Logging into HireTouch document](#).

2. Click the **Tasks** tab on the menu bar.

The screenshot shows the HireTouch dashboard with the 'TASKS' tab highlighted in the top navigation bar. Below the navigation bar, there are two main sections: 'VIEWED JOBS' and 'VIEWED APPLICANTS'.

Date	Time	Job ID	Title
Jul 25	4:15 PM	4191	Business Administrative Associate (Director) - Testing
Jul 25	3:03 PM	4615	Acct Assoc Resources Test (UAT)
Jul 25	11:46 AM	4102	Business/Administrative Associate (Business Director) - Art History
Jul 25	11:46 AM	4109	Business/Administrative Associate (Assistant Director) - College of Med
Jul 24	2:54 PM	4146	Information Technology Technical Associate (Web Developer) - Human Resources-Dept 6
Jul 20	11:29 PM	4143	Accounting Associate - Dept 17
Jul 20	11:24 PM	4926	Business/Administrative Associate (Assistant Director) - Art History
Feb 27	3:11 PM	4847	Extra Help Information Technology Support Associate (Help Desk Support) - University Library
Feb 27	3:11 PM	4907	Extra Help Administrative Clerk (Office Manager) - Training
Feb 27	2:54 PM	4910	Extra Help Administrative Clerk (Office Manager) - HRIS

Date	Time	Name
Jul 25	3:52 PM	Sally Albright
Jul 25	2:51 PM	Harry Burns
Jul 24	12:10 PM	Sandra Bullock
Jul 24	11:20 AM	Abigail Jeffrey

A list of tasks assigned to you appears.

3. Highlight the task in the **My Tasks** list.

The screenshot shows the 'My Tasks' list in HireTouch. A task titled 'Approval Requested: Position Authorization' is highlighted. The 'Job Forms' link in the task details is circled.

ID	Name	Task Type	Priority	Status	Task Date	Due Date
16586	Approval Requested: Position Authorization	Approval Requested: Position Authorization	Medium	Opened	Mon 11/19/12	

**Approval Requested: Position Authorization ID: 16586**

Task Details | Task History | Task Workflow

Task Type: Approval Requested: Position Authorization Task Date: Monday, November 19, 2012 at 1:13 AM Checklist: None

Priority: Medium Reminder Date: None Add an Item

Status: Opened Due Date: None

Created: Monday, November 19, 2012 at 1:13 AM by MC User1

Opened: Monday, November 19, 2012 at 1:13 AM by MC User1

Assigned To: MC User1

Link: [Job Forms](#)

Notes: None Add a Note

4. Click the **Job Forms** link in the lower-section of the task that displays.

- Click **Approvals** on the **Show Job Forms** page.

Staff Nurse I - Surgery  
UI Health - Nursing - Pending - PMC Review

Properties | Applicants | Activity | Processes | Forms

Job Forms | Comments

Show Job Forms

Form Name	Auto Generated Number	Status	Completed	Completion Date	Recertify	Action	Approval	Document History
Position Authorization			<input checked="" type="checkbox"/>	Mon, 11/19/12 at 1:00 AM		View	<b>Approvals</b>	View History

Your name appears in the **Job Form Approval** list for the job

- Click the **Review** button to view the form information on the form.

Business/Administrative Associate (Business Director) - Art History  
Chicago - Civil Service - Pending

Properties | Applicants | Activity | Processes | Forms

Job Forms | Comments

Job Form Approval

Form: Position Authorization - Civil Service  
Form Originator: Mezydio, Victoria

Title	Name	Approved	Rejected	Date	Document
Unit HR	Campus User				
College	Campus User				
*HR Compensation	_ *HR-Compensation				
*HR Recruitment & Staffing	_ *HR-Recruitment & Staffing				

Back | Approvals | **Review** | Edit | Approve | Reject | Download

This allows you to review the data entered in the form to determine if it should be approved or denied

Business/Administrative Associate (Business Director) - Art History  
Chicago - Civil Service - Pending

Properties | Applicants | Activity | Processes | Forms

Job Forms | Comments

View Form

Position Authorization - Civil Service

All fields marked with a red asterisk (\*) on this form are required.

HireTouch Job ID #: 4102

Reason for Filling Position: New Position

Appointment Type: Permanent

For Contract Appointment Types Only  
Worksite Location:

Flex Year Appointment Type:

Civil Service Classification: Business/Administrative Associate (5010)

Position Number: GD1234  
Former Incumbent's Name:  
Job Location: Chicago  
FTE Requested: 1.0

Business Necessity (Check all that apply): Business Continuity

**Campus HR Use Only**  
If you are not a Campus HR member, please click the Continue to Approvals button below:

Date Approved (PRMS): 01/20/2014  
Date Created (PRMS): 01/20/2014

Position Originator	Name	Status	Date
Unit HR	Victoria Mezydio		
College	Campus User		
*HR Compensation	_ *HR-Compensation		
*HR Recruitment & Staffing	_ *HR-Recruitment & Staffing		

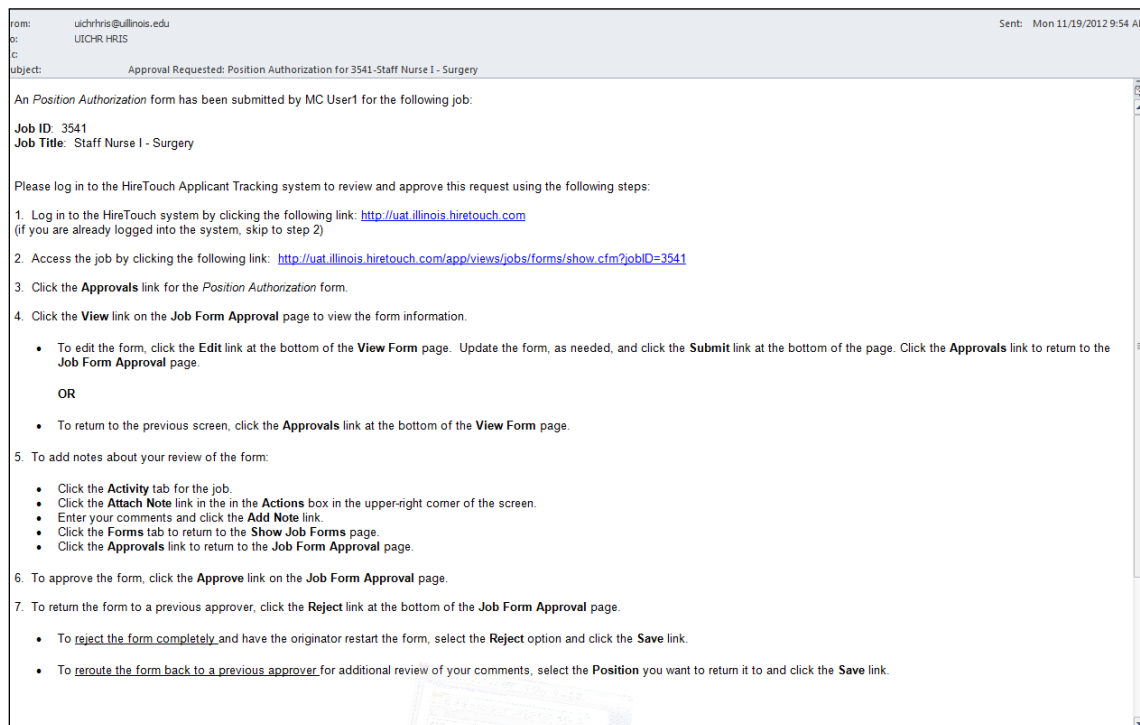
Approvals | Edit | Approve | Reject | Download

7. From this view you can:
- Click the **Approvals** button to return to the previous screen.
- OR**
- Click the **Edit** button to open the form in an editable window. You can update the form as needed send for further approval.
- OR**
- Click the **Approve** button to approve the information you reviewed.
- OR**
- Click the **Reject** button to reroute or reject the form.
- OR**
- Click the **Download** button to save a PDF copy of the form to your computer.

Refer to the steps in the **Post-Review Options: Approve, Reroute, or Reject** section later in this document for more information on these options.

## Option 2: Reviewing Forms via Email Notification

Another option for reviewing forms is via email notification. When you are selected as an approver for a form, you automatically receive an email notifying you that you have an approval to complete. This email contains steps needed to locate the job and approve the form, similar to the sample below.



While the email contains detailed steps for approving a form, you also can follow the steps below to locate the job you need to approve.

1. Login to the [HireTouch Administrative Application](#).



**NOTE:** For more information on accessing HireTouch, refer to the **Logging into HireTouch** document.

2. Click the **Jobs** tab.

The screenshot shows the HireTouch dashboard with the 'JOBS' tab selected. Below the navigation bar, there are two main sections: 'VIEWED JOBS' and 'VIEWED APPLICANTS'. The 'VIEWED JOBS' section contains a table with columns for Date, Time, Job ID, and Title. The 'VIEWED APPLICANTS' section includes a filter dropdown set to 'This Month' and a table with columns for Date, Time, and Name.

3. Search for the job in the list and click the job **Title**.

The screenshot displays the 'Civil Service Jobs' search results. At the top, there is a search bar and a dropdown menu for 'Civil Service Jobs'. Below this is a table with columns for 'TITLE', 'JOB ID', 'STATUS', 'ORG CODE', 'ORG NAME', 'HR OFFICER', 'POSITION AUTHORIZATION', 'POSTING', 'HR REVIEW', 'FREEZE/ REFERRAL', 'INTERVIEW', 'JOB OFFER', 'CLEARANCES', and 'ONBOARDING'. A red arrow points to the 'Accounting Associate - Training B' row.

4. Click the **Forms** tab within the job.
5. Click **Approvals** in the **Show Job Forms** list.

The screenshot shows the details for a 'Staff Nurse I - Surgery' job. The 'Forms' tab is selected and highlighted with a red circle. Below the tabs, there is a 'Show Job Forms' section with a table. The table has columns for 'Form Name', 'Auto Generated Number', 'Status', 'Completed', 'Completion Date', 'Recertify', 'Action', 'Approval', and 'Document History'. The 'Approvals' button in the 'Action' column is highlighted with a red circle.

Your name appears in the **Job Form Approval** list for the job.

6. Click the **Review** button to view the form information on the form.

HOME APPLICANTS JOBS TASKS

**Business/Administrative Associate (Business Director) - Art History**  
Chicago - Civil Service - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Job Form Approval

Form: Position Authorization - Civil Service  
Form Originator: Mezydio, Victoria

Title	Name	Approved	Rejected	Date	Document
Unit HR	Campus User				
College	Campus User				
*HR Compensation	_ *HR-Compensation				
*HR Recruitment & Staffing	_ *HR-Recruitment & Staffing				

Back Approvals **Review** Edit Approve Reject Download

This allows you to review the data entered in the form to determine if it should be approved or denied

HOME APPLICANTS JOBS TASKS

**Business/Administrative Associate (Business Director) - Art History**  
Chicago - Civil Service - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

View Form

**Position Authorization - Civil Service**

All fields marked with a red asterisk (\*) on this form are required.

HireTouch Job ID # 4102

Reason for Filling Position: New Position

Appointment Type <sup>?</sup> Permanent

For Contract Appointment Types Only  
Worksite Location:

Flex Year Appointment Type:

Civil Service Classification: Business/Administrative Associate (5010)

Position Number <sup>?</sup> CD1234

Former Incumbent's Name:  
Job Location: Chicago  
FTE Requested: 1.0

Business Necessity (Check all that apply): Business Continuity

**Campus HR Use Only**  
If you are not a Campus HR member, please click the Continue to Approvals button below.

Date Approved (PRMS): 01/20/2014  
Date Created (PRMS): 01/20/2014

Position Originator	Name	Status	Date
Unit HR	Victoria Mezydio		
College	Campus User		
*HR Compensation	_ *HR-Compensation		
*HR Recruitment & Staffing	_ *HR-Recruitment & Staffing		

Approvals **Approvals** Edit Approve Reject Download

7. From this view you can:
  - a. Click the **Approvals** button to return to the previous screen.  
**OR**
  - b. Click the **Edit** button to open the form in an editable window. You can update the form as needed send for further approval.  
**OR**
  - c. Click the **Approve** button to approve the information you reviewed.  
**OR**
  - d. Click the **Reject** button to reroute or reject the form.  
**OR**
  - e. Click the **Download** button to save a PDF copy of the form to your computer.

Refer to the steps in the **Post-Review Options: Approve, Reroute, or Reject** section later in this document for more information on these options.

## Adding Notes About your Review

If you want to add notes regarding your review of the form, you can do so via the **Job Form Approvals** page.

1. Enter your comments and click the **Add Note** button.

The screenshot displays the 'Job Form Approvals' page for a 'Business/Administrative Associate (Business Director) - Art History' position. The page includes a navigation menu with 'HOME', 'APPLICANTS', 'JOBS', and 'TASKS'. Below the job title, there are tabs for 'Properties', 'Applicants', 'Activity', 'Processes', and 'Forms'. The 'Job Form Approval' section shows a table with columns for 'Title', 'Name', 'Approved', 'Rejected', 'Date', and 'Document'. The table contains one row with a green checkmark in the 'Approved' column. Below the table, there are buttons for 'Back', 'Approvers', 'Review', 'Edit', 'Approve', 'Reject', and 'Download'. A section titled '0 NOTES SO FAR' shows a note from 'Campus User' with the text 'Please update the Preferred Qualifications for this job:'. A red arrow points to the 'Add Note' button at the bottom left of the note section.

Title	Name	Approved	Rejected	Date	Document
Unit HR	Campus User	✓		10/02/29 PM Wed 7/25/18	
College	Campus User				
*HR Compensation	*HR Compensation				
*HR Recruitment & Staffing	*HR Recruitment & Staffing				

2. Your notes appear below the list of approvers.

The screenshot shows the 'Job Form Approval' page for a 'Business/Administrative Associate (Business Director) - Art History' position. Below the approver table, there is a note section with the following content:

1 NOTE SO FAR  
 Wed 7/25/18 | Campus User said...  
 Please update the Preferred Qualifications for this job.

These notes will be viewable by the users reviewing the job and the forms in the future.

## Post-Review Options: Approve, Reroute, or Reject

Once you complete your review, you need to determine if you will approve, reroute, or reject the form.

### Approving a Form

**Approving** a form indicates your review is complete and you confirm the information entered on the form. It also sends a notification to the next approver in the list, or, if you are the last approver, a notification to the Form Originator that your approval is complete.

1. From the **Job Form Approval** page, click the **Approve** button.

The screenshot shows the 'Job Form Approval' page with the 'Approve' button circled in red. The table of approvers is visible, with the 'Name' column containing 'Campus User' in red text.

- A green check ( ✓ ) indicates approval of the form by that person
- A name in **red** indicates the next person who needs to approve the form
- Dates and times of approvals are indicated in the far-right column



## Rerouting a Form

**Rerouting** a form notifies the selected approver that you are returning the form back to them for re-review and possible changes. A reroute asks the selected approver to either confirm data on the form or to make suggested edits before sending the form through for approval. Notes added to the Activity tab (as outlined previously) will assist the user in determining why you have rerouted a form.

1. From the **Job Form Approval** page, click the **Reject** button.

Business/Administrative Associate (Business Director) - Art History  
Chicago - Civil Service - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Job Form Approval

Form: Position Authorization - Civil Service  
Form Originator: Mezydlo, Victoria

Title	Name	Approved	Rejected	Date	Document
Unit HR	Campus User				
College	Campus User				
*HR Compensation	*HR-Compensation				
*HR Recruitment & Staffing	*HR-Recruitment & Staffing				

Back Approvers Review Edit Approve **Reject** Comments

2. In the **Reject Form** list, select the appropriate **Reroute Form** position and click the **Save** button.

Staff Nurse I - Surgery  
UI Health - Nursing - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Reject Form

Reroute Form	Name
Position	
<input checked="" type="radio"/> Hiring Manager	MC User2
Reject	
<input type="radio"/> Reject Form	

**Save** Back

3. This action reroutes the form back to the selected user and notifies them, via email, that you have rerouted the form. The email contains instructions for the user to review to determine the next steps for this position.

## Rejecting a Form

**Rejecting** a form notifies the Form Originator that you have denied their request as submitted. A rejection asks the Form Originator to either start over with the submission of the form or to consider the form denied outright. Notes added to the Activity tab (as outlined previously) will assist the user in determining why you have rejected a form.

1. From the **Job Form Approval** page, click the **Reject** button.

Business/Administrative Associate (Business Director) - Art History  
Chicago - Civil Service - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Job Form Approval

Form: Position Authorization - Civil Service  
Form Originator: Mazydlo, Victoria

Title	Name	Approved	Rejected	Date	Document
Unit HR	Campus User				
College	Campus User				
*HR Compensation	*HR Compensation				
*HR Recruitment & Staffing	*HR Recruitment & Staffing				

Back Approvers Review Edit Approve **Reject** Show

2. In the **Reject Form** list, select the **Reject Form** option and click the **Save** button.

Staff Nurse I - Surgery  
UI Health - Nursing - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Reject Form

Reroute Form	
Position	Name
<input type="radio"/> Hiring Manager	MC User2
<input checked="" type="radio"/> Reject Form	

**Save** Back

3. This action rejects the form and notifies the Form Originator, via email, that you have rejected the form. The email contains instructions for the Form Originator to review to determine the next steps for this position.