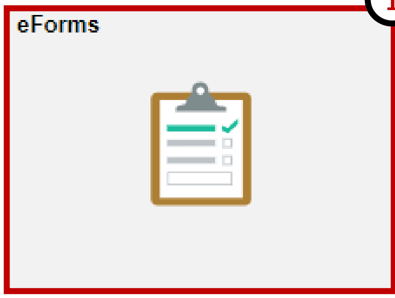
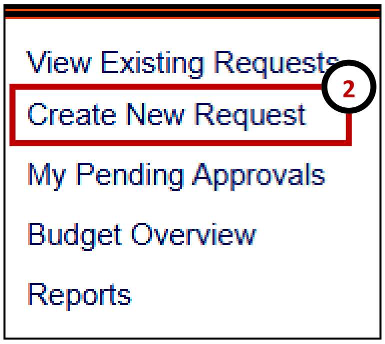
Appointment Request

This eForm should be used when appointing a new paid employee for the first time or when appointing a returning employee with a break in service.

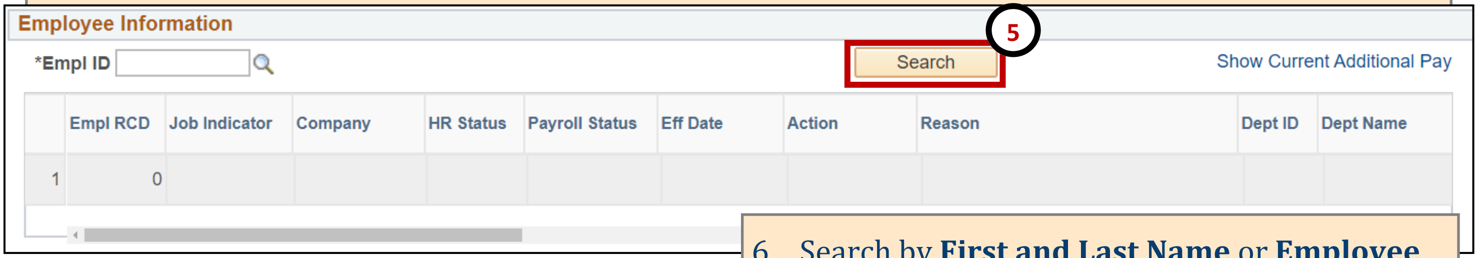
1. After logging into PeopleSoft, click the **eForms tile** on the Employee Self-Service home page.
2. From the "eForms Portal Pagelet" select the **Create New Request** link.





3. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **Appointment Request** option.
4. The **Appointment Request** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.

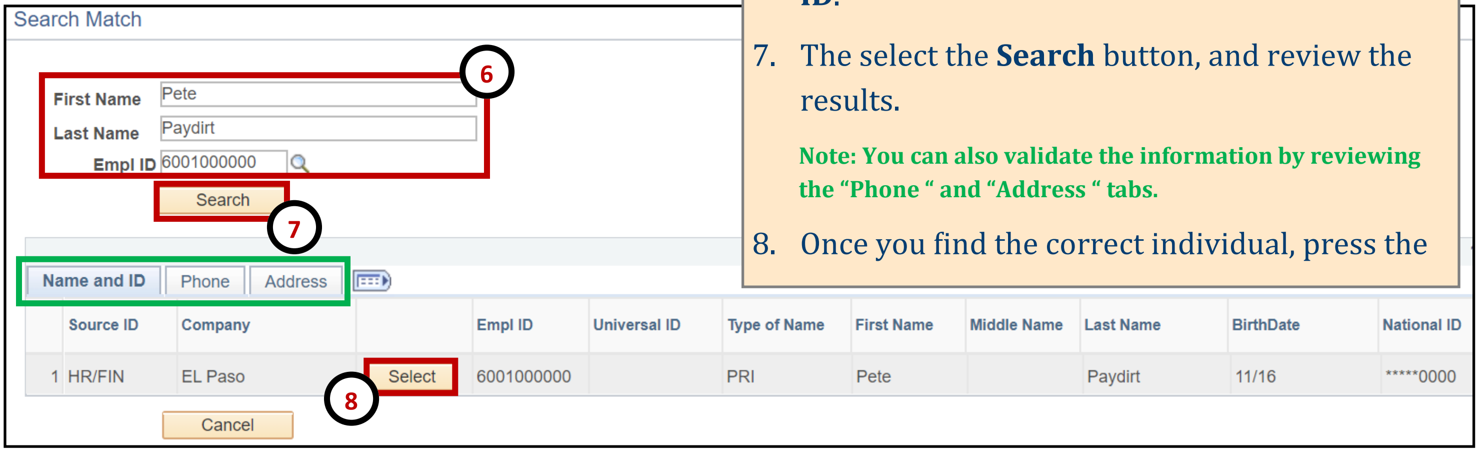
5. Use the "Search Match" feature to find the individual that will be newly appointed, by selecting the **Search** button:



6. Search by **First and Last Name** or **Employee ID**.
7. The select the **Search** button, and review the results.

Note: You can also validate the information by reviewing the "Phone " and "Address " tabs.

8. Once you find the correct individual, press the



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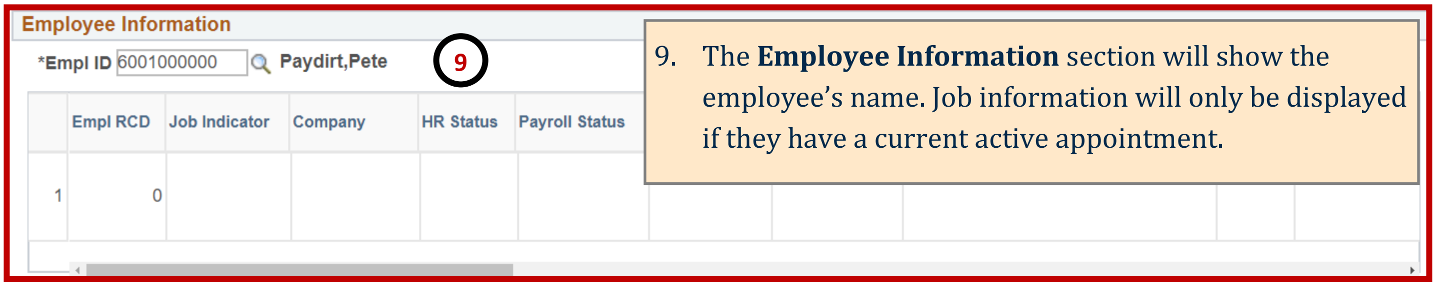
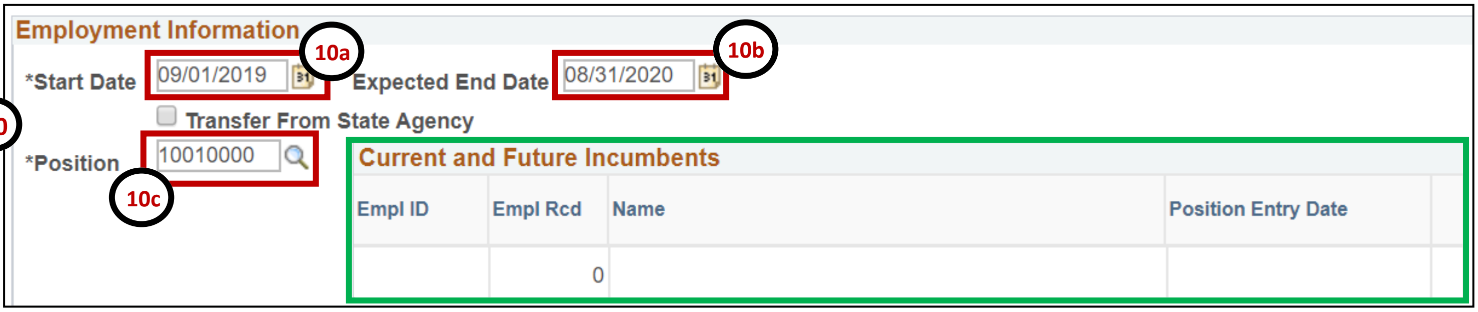


9. The **Employee Information** section will show the employee's name. Job information will only be displayed if they have a current active appointment.



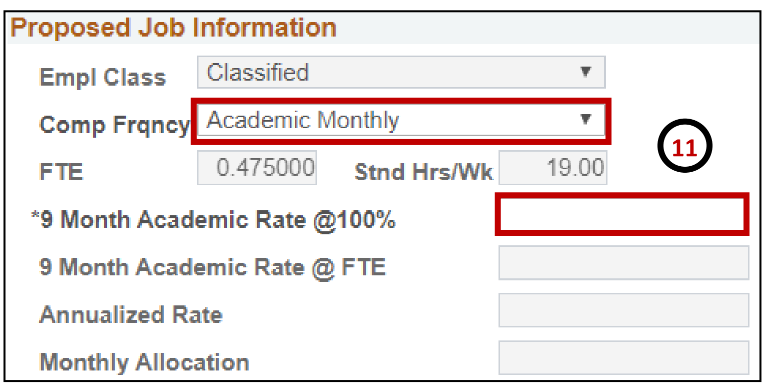
10. Under the **Employment Information** section make the following changes:

  10a. Enter the **Start Date**.

  10b. Enter the **Expected End Date**, if applicable.

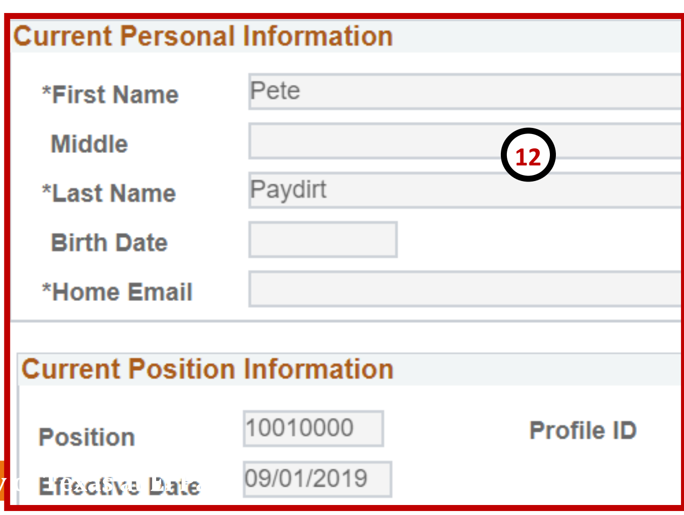
  10c. Enter the **Position Number**, use the magnifying glass to search for the position number.

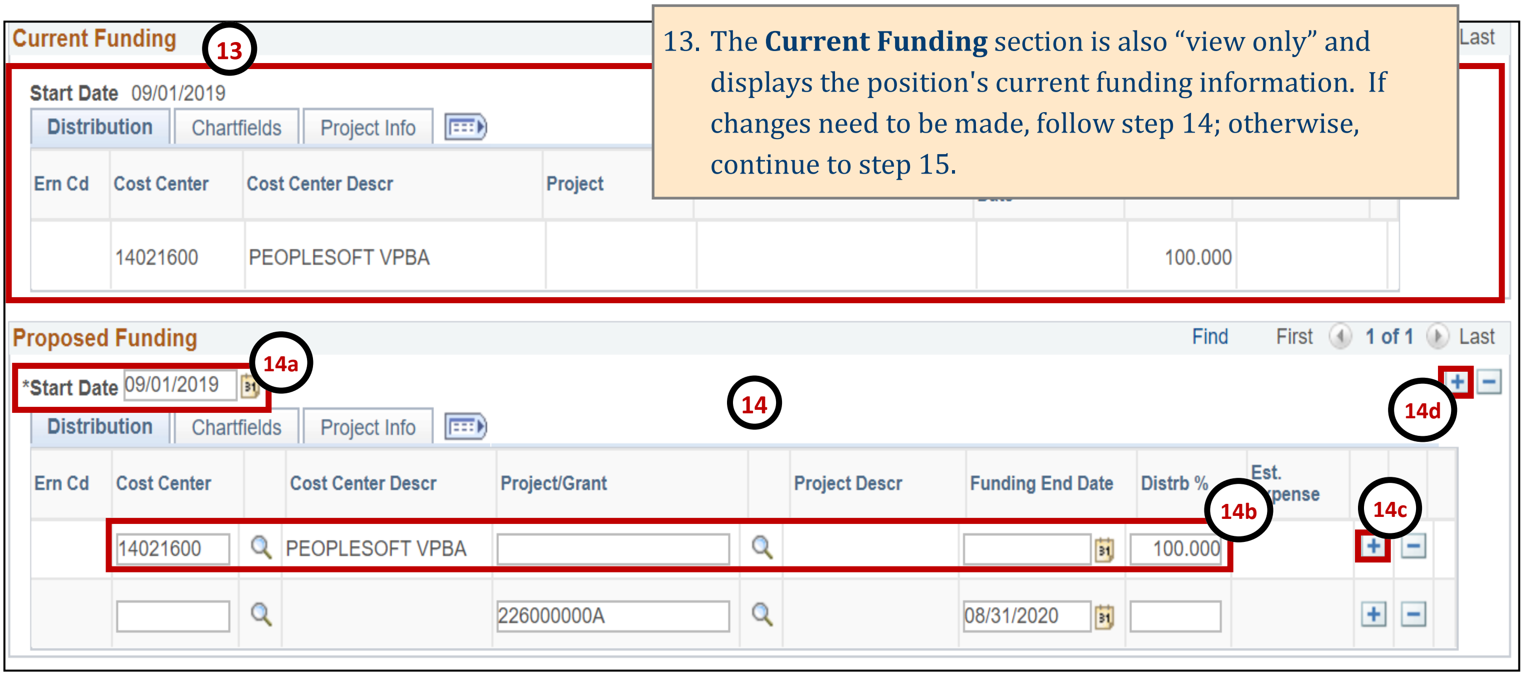
  Note: If the there is a current incumbent you will see the employee's information under the "Current and Future Incumbents" section.



11. Enter the **pay rate** based on the compensation frequency, or if needed you can make changes to **Comp Frqncy.** The rate fields will adjust based on the comp frequency selected and the amount entered.

12. Next you will see the **Current Personal Information** and the **Current Position Information;** these sections are "view only" and provide details regarding the employee and position.





13. The **Current Funding** section is also "view only" and displays the position's current funding information. If changes need to be made, follow step 14; otherwise, continue to step 15.

14. In the **Proposed Funding** section update the funding source information, as needed.

    14a. Verify the start date is correct.

    14b. Enter the new cost center or project ID (in the respective field), add the funding end date (if applicable) and enter the distribution percentage.

    14c. If adding more than one funding source click the **+** button next to the **Est. Expense** column. A new line will appear, repeat step 14b.

    14d. If adding an additional funding source with a different "start date" click the **+** button on the upper right corner of the **Proposed Funding** field, an additional funding section will appear. Add the start date and repeat step 14b.

PeopleSoft Tip

When making changes to the funding source:

- The new funding source must hold sufficient funds
- The funding distribution should always equal 100%
- If using a Project/Grant, the funding start/end date must fall within the project start date.

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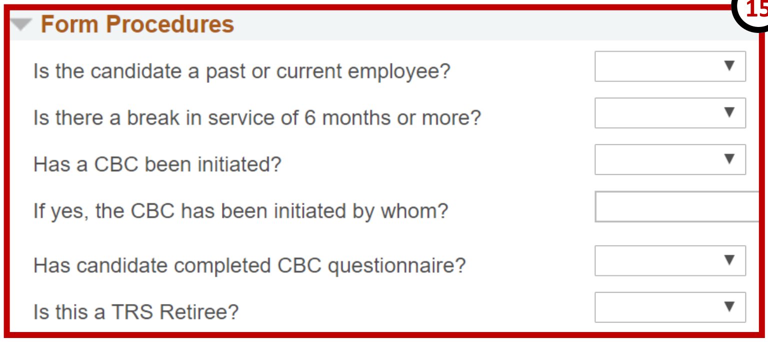


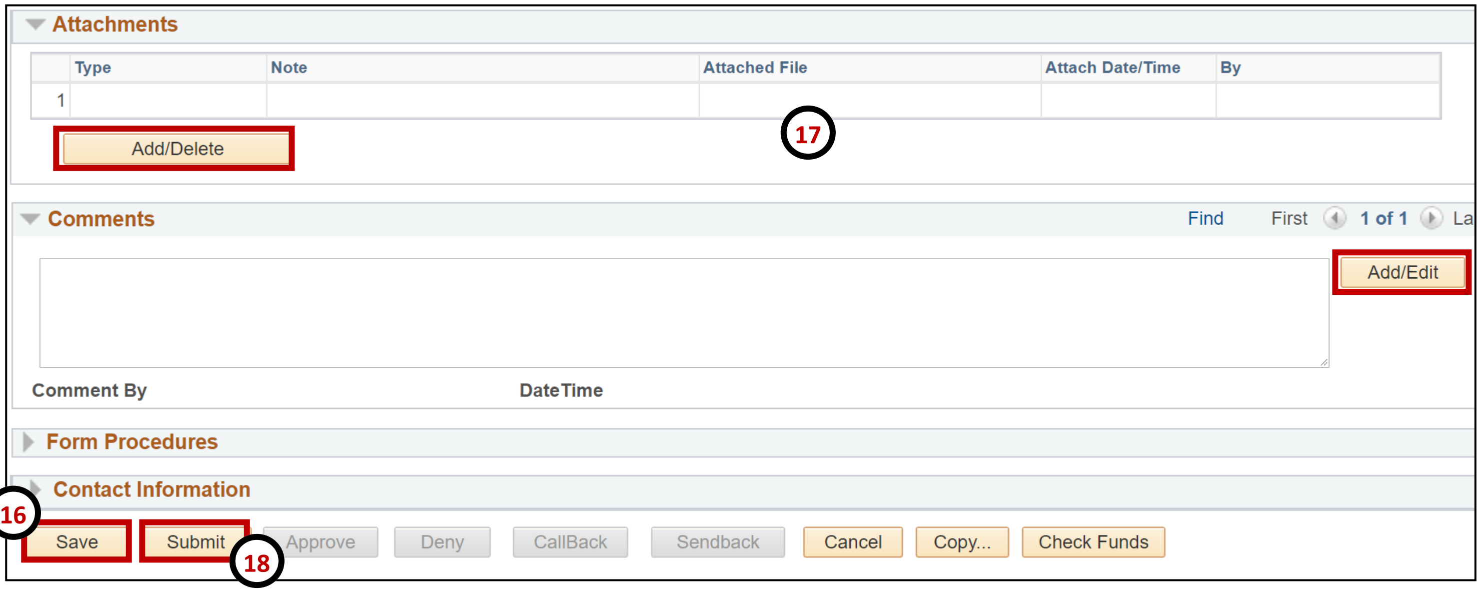
15. Make sure to respond to the questions under the **Form Procedures** section.

16. Once all the required fields have been completed, click the **Save** button at the bottom of the form.

    Notice: At the top of the form, the **Request ID** number has been assigned and the status of the form is now "**Saved**."

17. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

18. After adding any attachments and comments (if needed), click the **Submit** button.



19. Once the document is submitted, the status of the form will update and show "**Pending Approvals.**" The current approval routing is displayed at the bottom of the page.