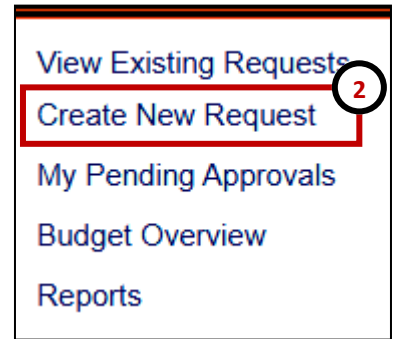
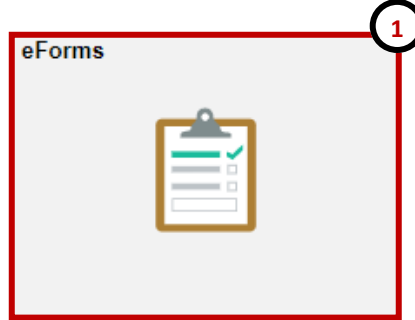


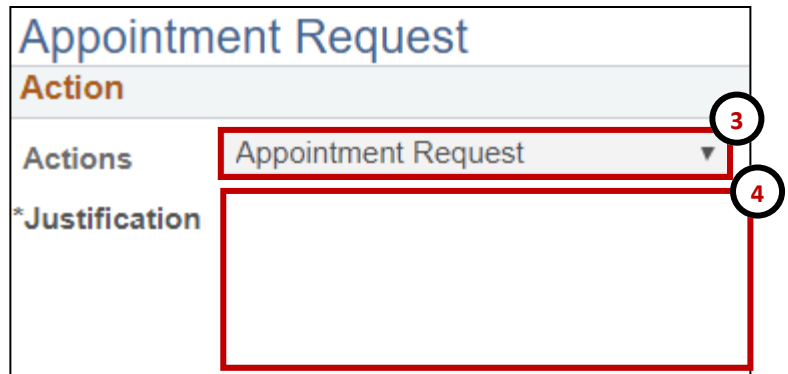
Appointment Request

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.

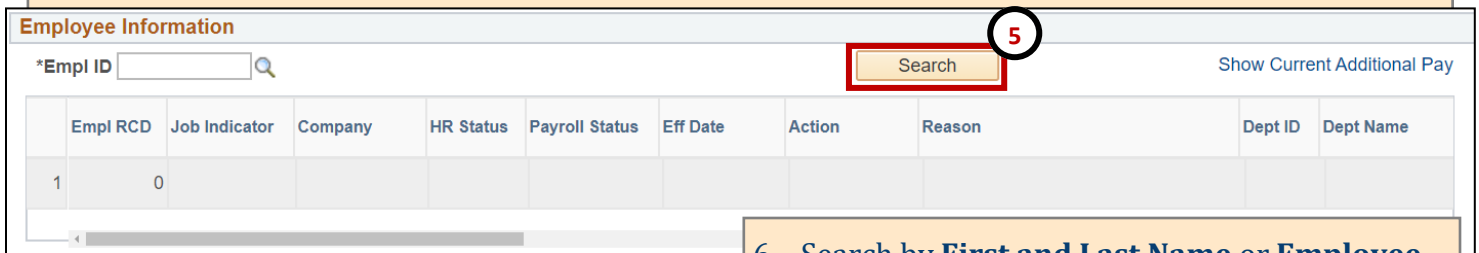
1. After logging into PeopleSoft, click the **eForms** tile on the Employee Self-Service home page.
2. From the “eForms Portal Pagelet” select the **Create New Request** link.



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:

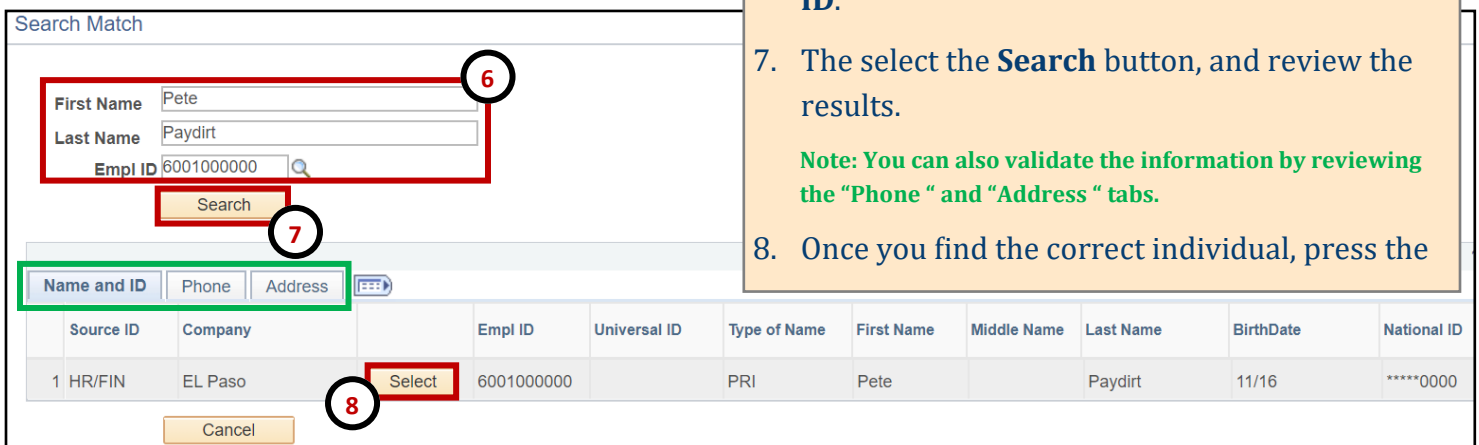


6. Search by **First and Last Name** or **Employee ID**.

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



Appointment Request

Employee Information

*Empl ID **9**

Empl RCD	Job Indicator	Company	HR Status	Payroll Status
1	0			

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

Employment Information

*Start Date **10a** Expected End Date **10b**

Transfer From State Agency

*Position **10c**

Current and Future Incumbents

Empl ID	Empl Rcd	Name	Position Entry Date
	0		

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

Proposed Job Information

Empl Class

Comp Frqncy **11**

FTE Stnd Hrs/Wk

*9 Month Academic Rate @100%

9 Month Academic Rate @ FTE

Annualized Rate

Monthly Allocation

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.

Current Personal Information

*First Name

Middle

*Last Name **12**

Birth Date

*Home Email

Current Position Information

Position Profile ID

Effective Date

Appointment Request

Current Funding 13

Start Date 09/01/2019

Distribution | Chartfields | Project Info

Em Cd	Cost Center	Cost Center Descr	Project				
	14021600	PEOPLESOFT VPBA					100.000

Proposed Funding Find First 1 of 1 Last

*Start Date 09/01/2019 14a

Distribution | Chartfields | Project Info

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrib %	Est. Expense
	14021600	PEOPLESOFT VPBA				100.000	14b 14c
			226000000A		08/31/2020		14d

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.

Appointment Request

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

Form Procedures

Is the candidate a past or current employee?

Is there a break in service of 6 months or more?

Has a CBC been initiated?

If yes, the CBC has been initiated by whom?

Has candidate completed CBC questionnaire?

Is this a TRS Retiree?

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.

Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

17

Add/Delete

Comments Find First 1 of 1 Last

18 Add/Edit

Comment By DateTime

Form Procedures

Contact Information

16 Save **18** Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds

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.

Department Approvals

REQUEST_ID=00107821:Pending

Dept Approvals

Pending

Jane Smith
New Position Reports To

19

Funding Approvals

REQUEST_ID=00107821:Awaiting Further Approvals

Funding Source

Not Routed

Multiple Approvers
FMS Cost Center Approver

Business Office Approvals

REQUEST_ID=00107821:Awaiting Further Approvals

Appointment

Not Routed

Multiple Approvers
EDM