UT SHARE

Hiring eForms (Phase II)

PEOPLESOFT

THE UNIVERSITY OF TEXAS AT EL PASO

Agenda

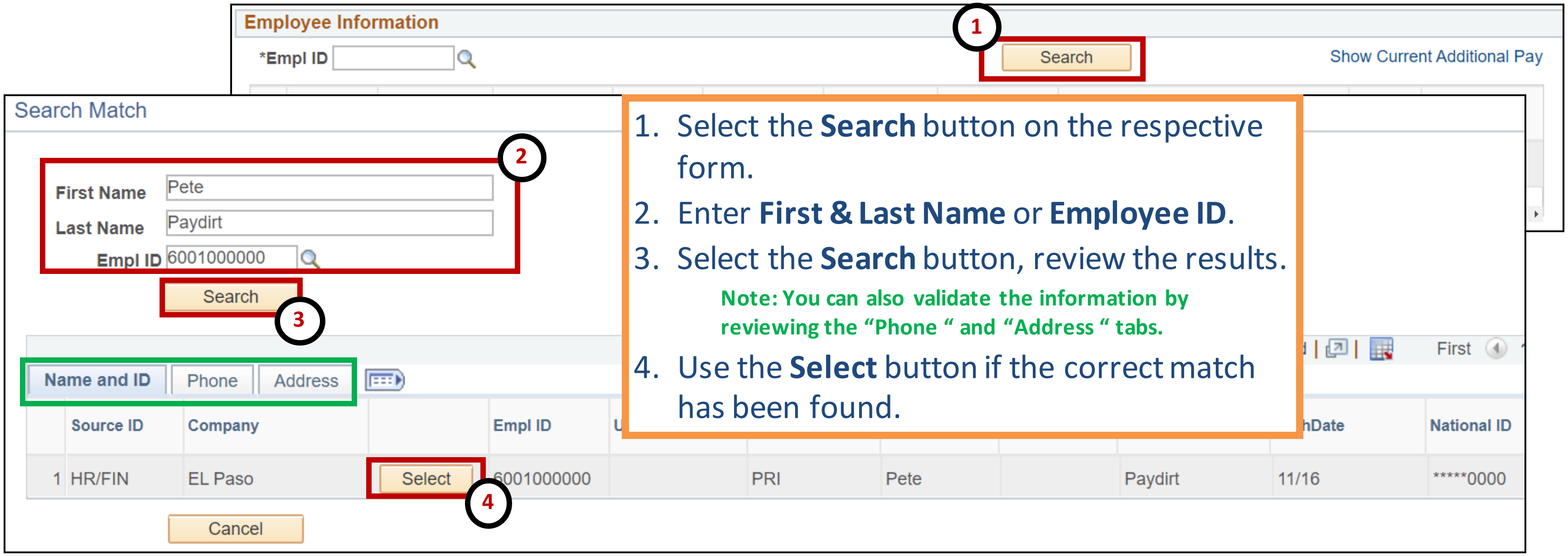
- eForms Overview
- New eForms:
  - Affiliate
  - New Position
  - Appointment (New Hire/Rehire)
  - Position Attribute Change
  - Job Attribute Change
  - Transfer
- Approving eForms
- eForm Tips

eForms Overview

What's new?

- **No dual entry:** eForms enable electronic processing in PeopleSoft, approval routing, and provide audit and reporting capabilities.
- **New Forms:** eForms will be available for new appointments, rehires, transfers, position changes, and updates to job information.
- **New Feature**: Search Match

Search Match



1. Select the **Search** button on the respective form.
2. Enter **First & Last Name** or **Employee ID**.
3. Select the **Search** button, review the results.

   Note: You can also validate the information by reviewing the "Phone " and "Address " tabs.
4. Use the **Select** button if the correct match has been found.

- **Search Match** enables you to find individuals outside of your departmental access and is only available for the new **Appointment Request, Affiliate Request,** and **Transfer** eForms.

eForms Overview

Who will use the new eForms?

- **Initiators:** department users with ability to create new and view existing eForms
- **Department Approvers:** department heads, "Reports To" supervisors, or budget authorities who are able to view and approve submitted eForms
- **Back Office Reviewers:** processing offices such as Human Resources, Budget Office, Employment Data Management (EDM), Grants & Research, Financial Aid, etc.

eForms Overview

Things to Know

- eForms will be accessible directly on the PeopleSoft home page.
- All eForms have the option to attach documents and add comments
- Initiators will still have access to search, recall, and cancel documents.
- Approvers will receive e-mails regarding pending documents and they can also approve using the eForms tile in PeopleSoft.

eForms Overview

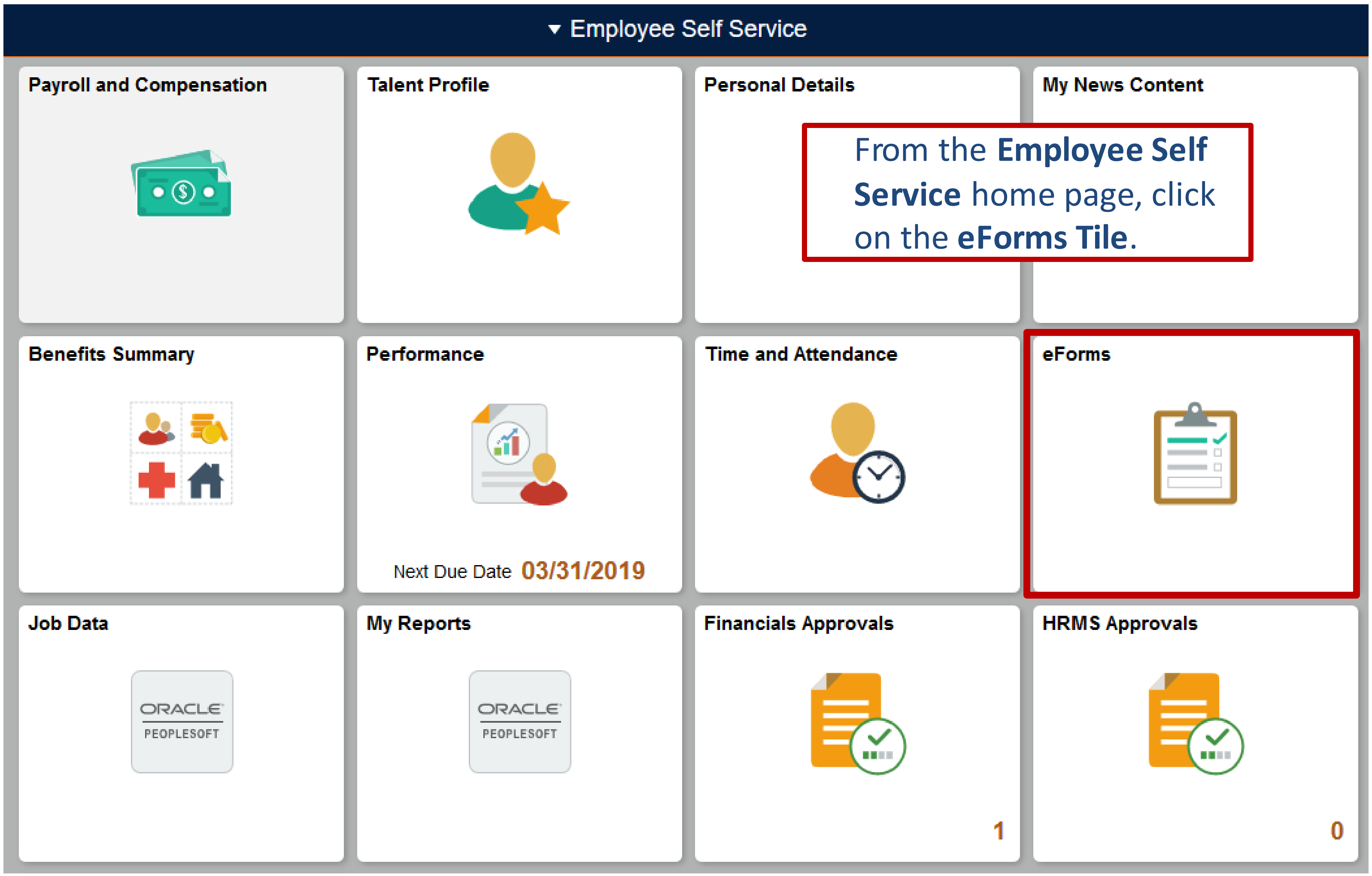
IAPS

- **Effective April 6, 2020**, the Appointment Actions Request and the Position Request & Modifications IAP forms will be replaced by the newest eForms.

- **Affiliate Request IAP** continue to use for student program participants and for 800# (SPRIDEN ID).

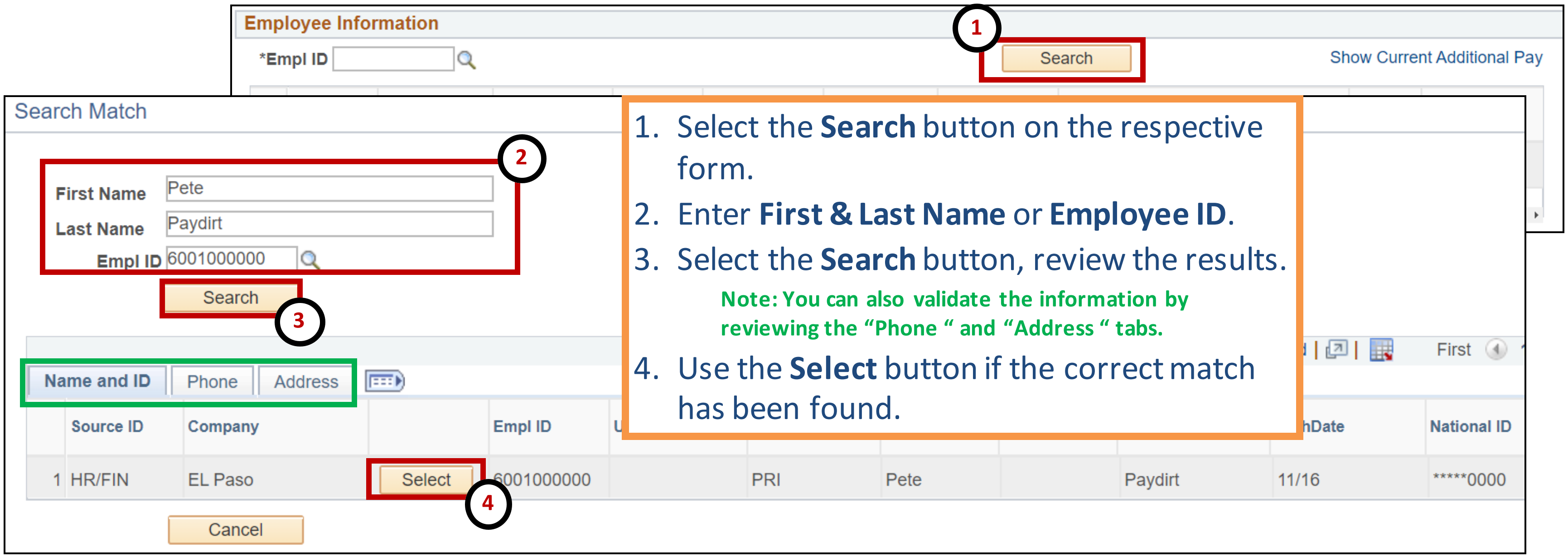
- **DBT** Funding submissions/changes will be fully completed through eForms.

Initiating an eForm



From the **Employee Self Service** home page, click on the **eForms Tile**.

Search Match



- **Search Match** enables you to find individuals outside of your departmental access and is only available for the new **Appointment Request, Affiliate Request,** and **Transfer** eForms.

Affiliate

When to use

- For a person who will not be paid or receive benefits through UTEP but needs access to facilities or systems for other purposes. Such person is sponsored by a UTEP employee and is compensated by other means or a third party.

  - **Example-** EPCC student working under the Humanities Collaborative at EPCC-UTEP will be interning at UTEP Centennial Museum working on exhibit preparation, collection organizing, and other similar duties. Student will require a parking permit and access to UTEP library databases off-campus for research projects.

- To appoint vendor or contractor who will be paid via APS.

- Extending a current Affiliate past the current end date.

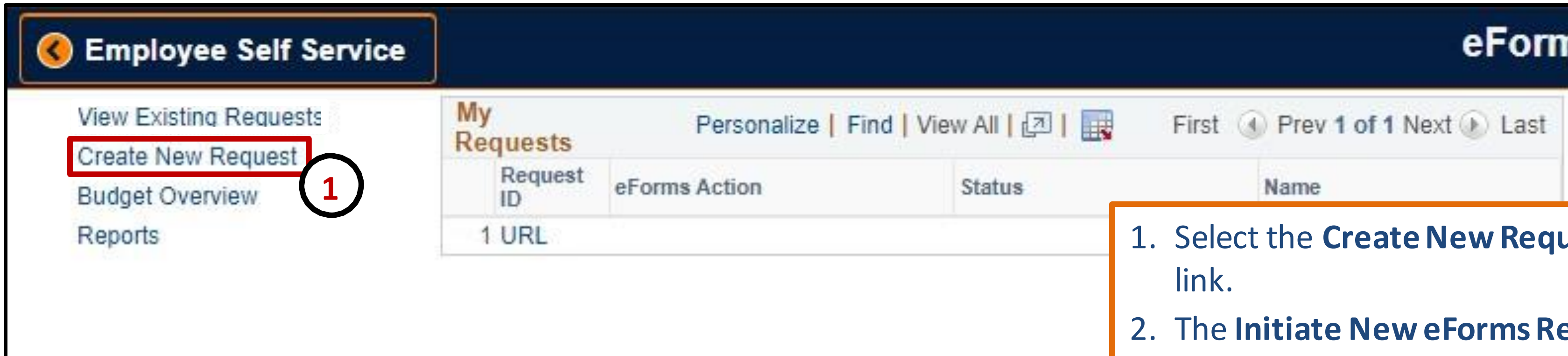
When NOT TO use

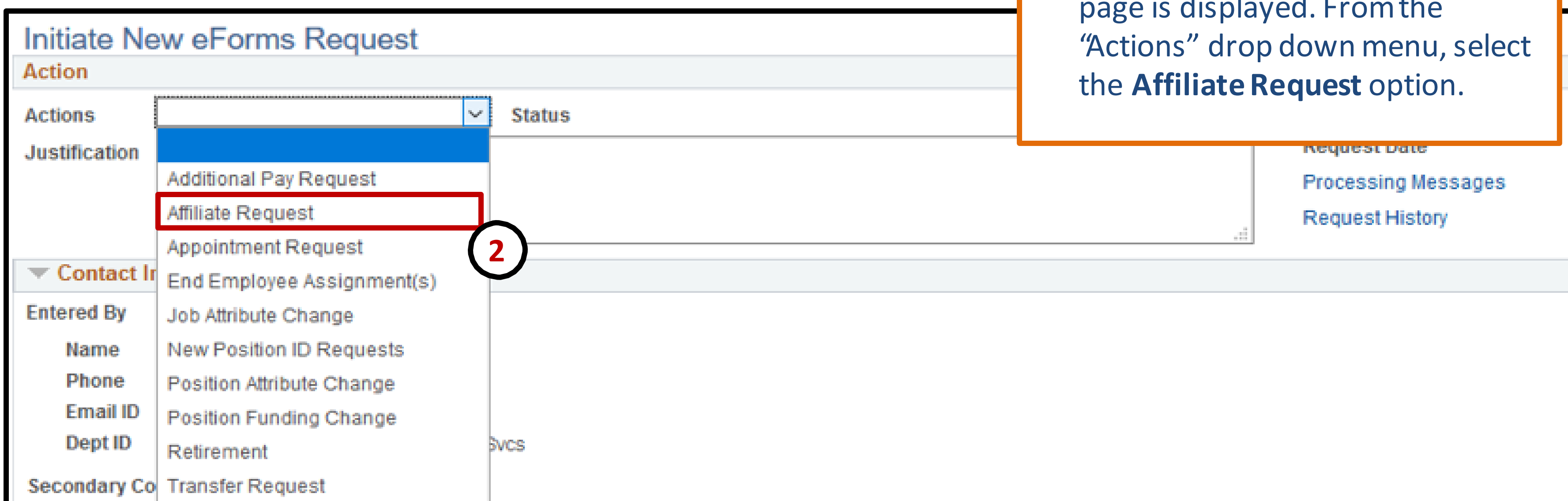
- To gain early access for a paid employee.

Affiliate Warning Messages

- **General Warning-** Warning message on duplicate request for a Position #/Empl ID.
- **Hard Stop-** Error message for missing required fields and/or attachments, date errors.
  - Please attach a valid Government issued photo ID to the eForm.
    - Drivers License
    - Passport
    - Etc.

Initiating an Affiliate eForm





1. Select the **Create New Request** link.
2. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **Affiliate Request** option.

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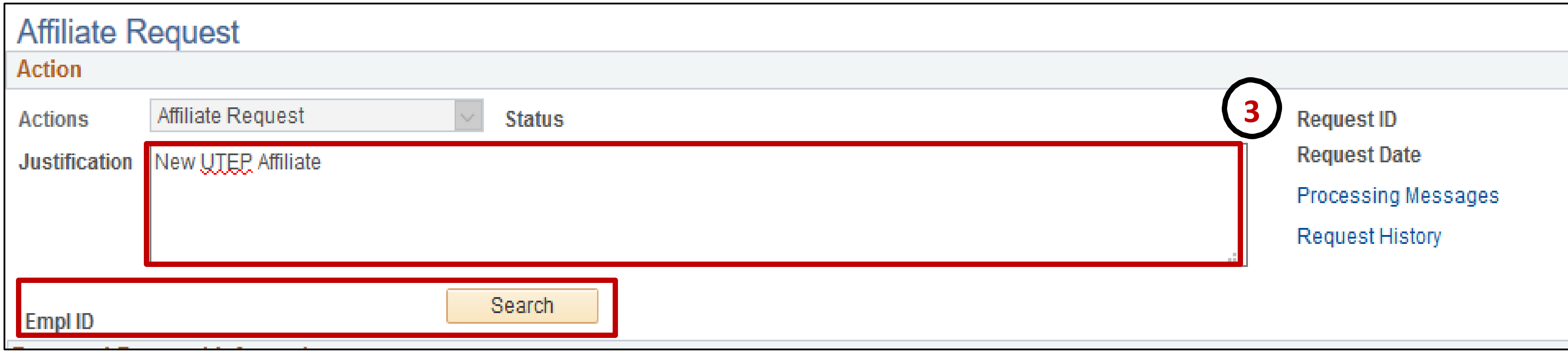
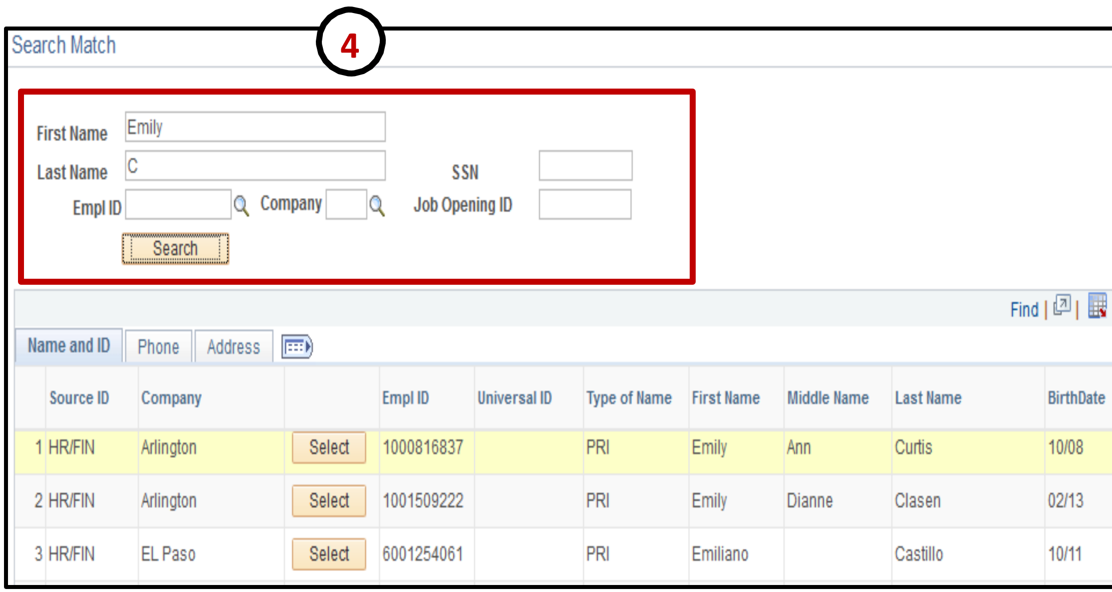
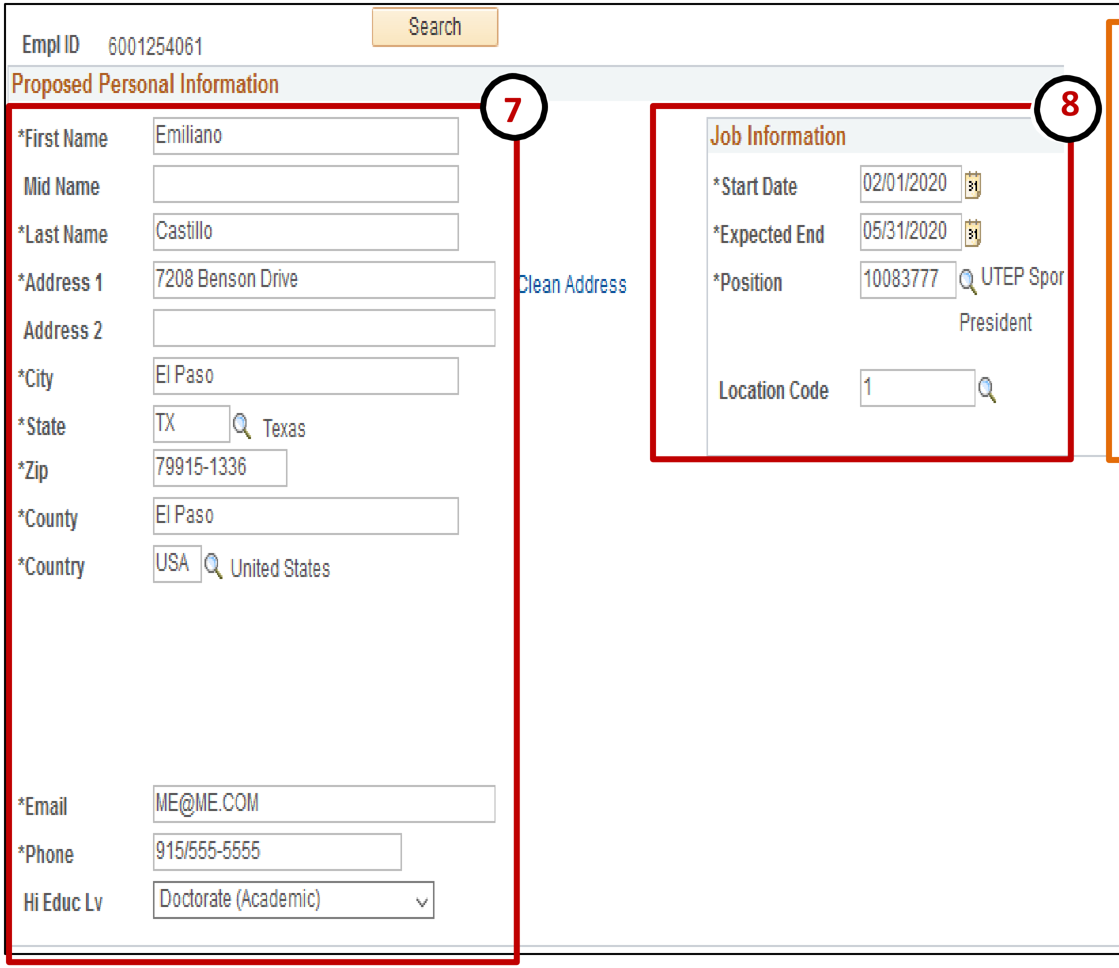
Initiating an Affiliate Request eForm





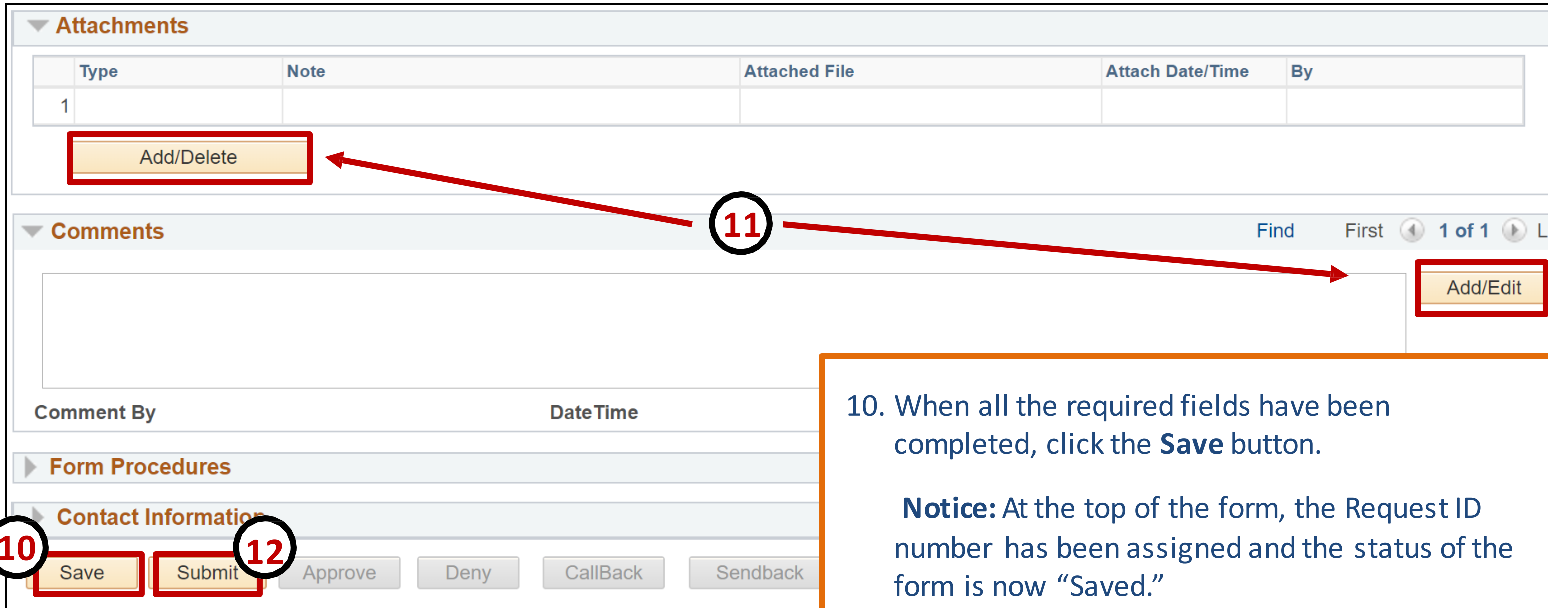
3. The **Affiliate Request** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
4. To verify if the employee being appointed has an Empl ID please use the "Search" button, here you can search by the following fields:
    - First Name
    - Last Name
    - Empl ID (if known)
    - Company
    - SSN

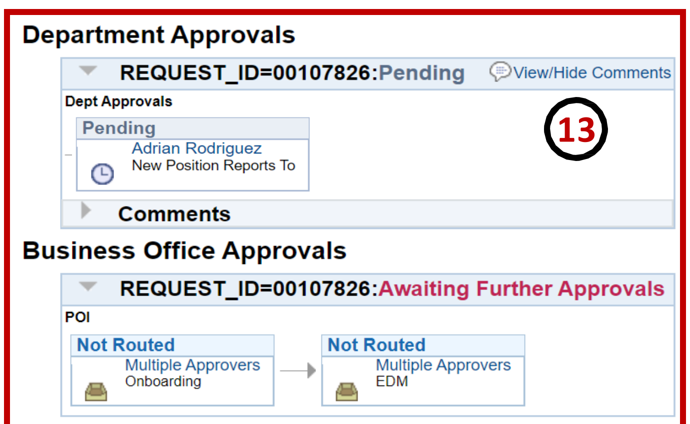
Initiating an Affiliate Request eForm



7. If an employee is selected from the Search Match the Personal Information will populate (Please double check this information is correct before submitting)
8. The **Job Information** will need to be updated with the start date & expected end date. The position number will be provided to your department before hand by EDM (each College & Division has one Affiliate position number for all Affiliates)

Initiating an Affiliate Request eForm





10. When all the required fields have been completed, click the **Save** button.

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

11. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
12. Click the **Submit** button.
13. 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.

Affiliate Request Workflow

Affiliate Request eForm

Creator

- Affiliate Request eForm is submitted by department initiator

Department Approvals

- CAO or Reports to Approval

Backoffice Review

- HR Onboarding
- Back Office Approvers- (EDM)

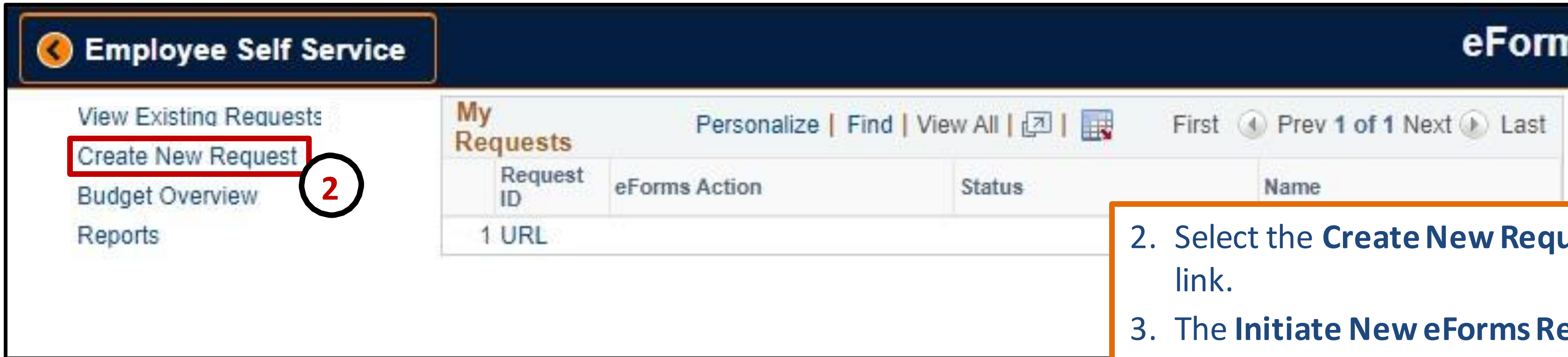
New Position Request ID eForm

When to use

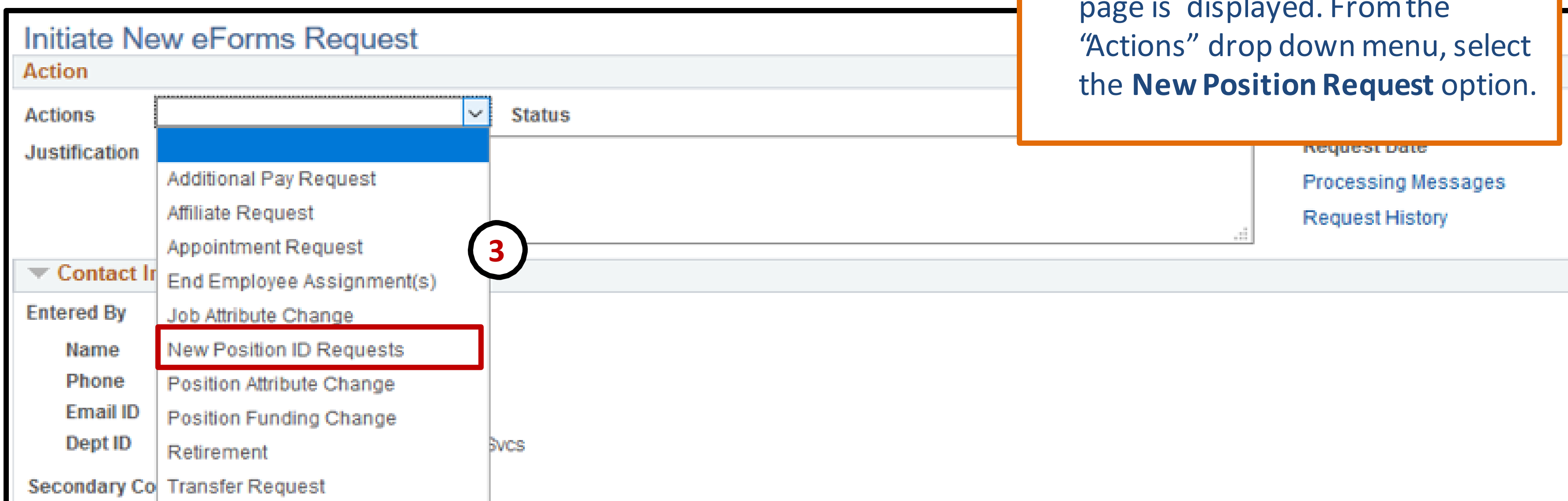
- When all available vacant positions in the Department have been utilized.
  - **Example** - Department has requested a new Ph. D Teaching Assistant position in order for the department to function at full capacity.

- Type of positions
  - **Staff positions** – SEAR Approvals are needed for any New/Rehired Employee and the eForm will be submitted by HR
  - **Faculty positions** – All Tenure/Tenure Track (Professor, Associate Professor, & Assistant Professor) need to have an approved offer letter
  - **Student positions** – Will be created or activated as needed

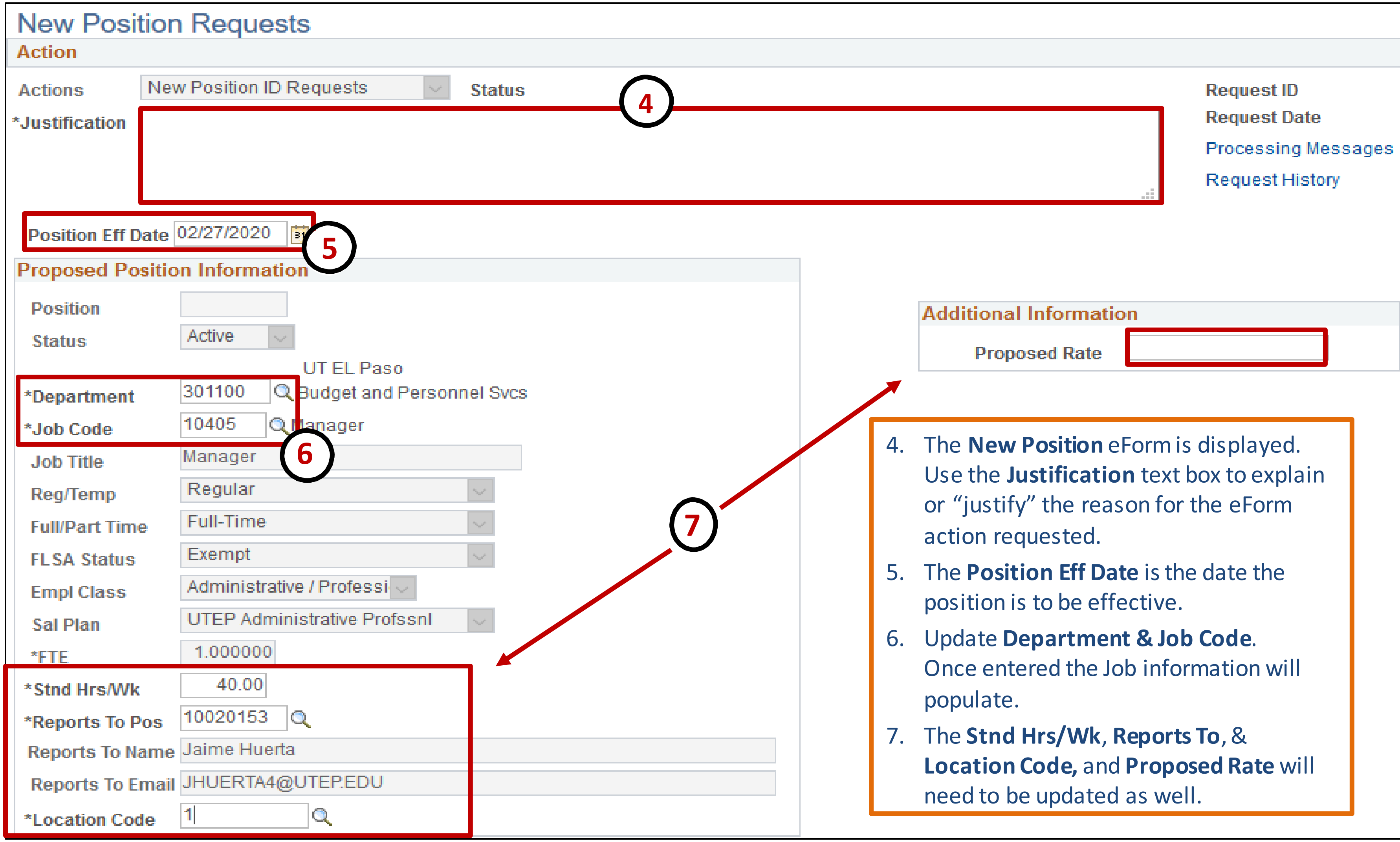
Initiating a New Position eForm



2. Select the **Create New Request** link.
3. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **New Position Request** option.

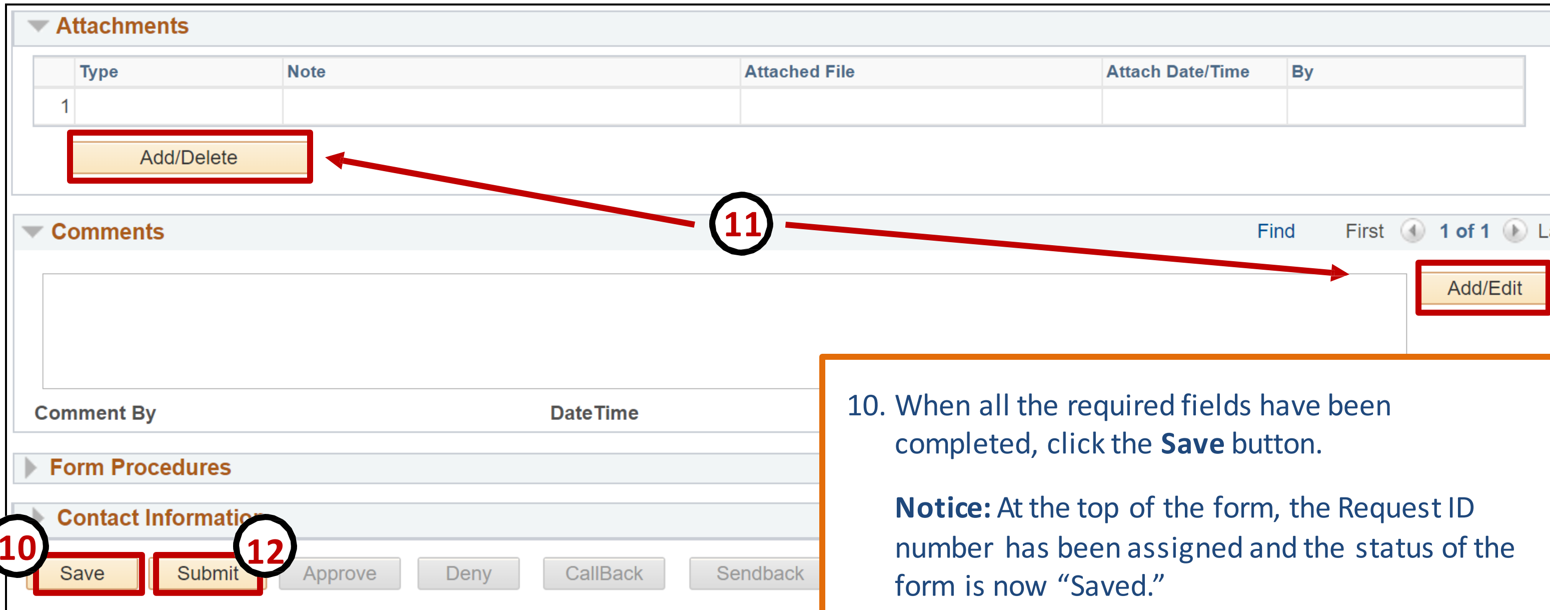


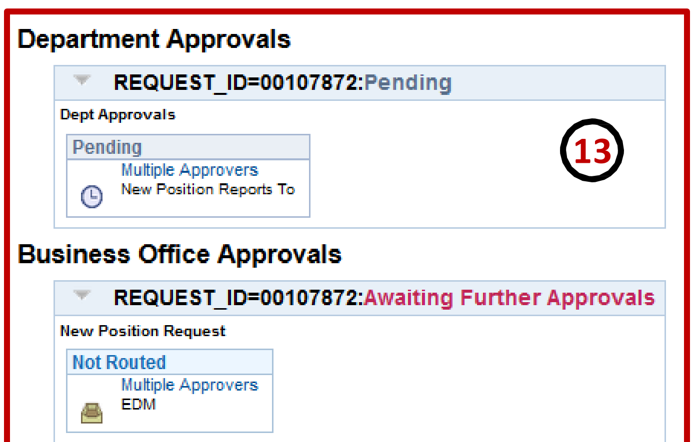
Initiating a New Position eForm



4. The **New Position** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.
5. The **Position Eff Date** is the date the position is to be effective.
6. Update **Department & Job Code**. Once entered the Job information will populate.
7. The **Stnd Hrs/Wk**, **Reports To**, & **Location Code,** and **Proposed Rate** will need to be updated as well.

Initiating a New Position eForm





10. When all the required fields have been completed, click the **Save** button.

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

11. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
12. Click the **Submit** button.
13. 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.

New Position Workflow

New Position eForm

Creator

- New Position form is submitted by department initiator

Department Approval

- Reports to reviews and approves

Backoffice Approval

- Back Office Approvers (EDM)

Position Attribute Change (PAC) Request

When to use

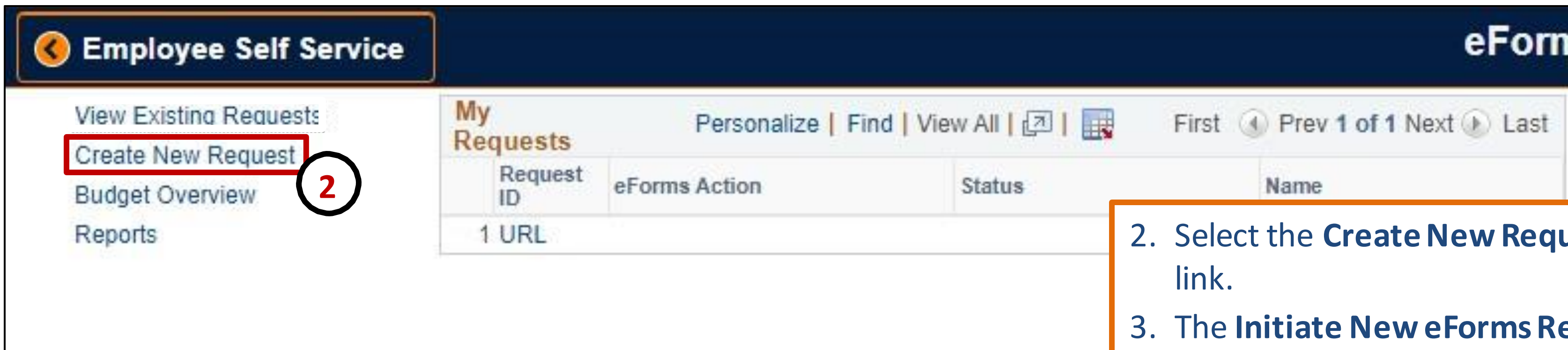
- A change in FTE (Hours), Reports To, Department, Location, or Working Title.

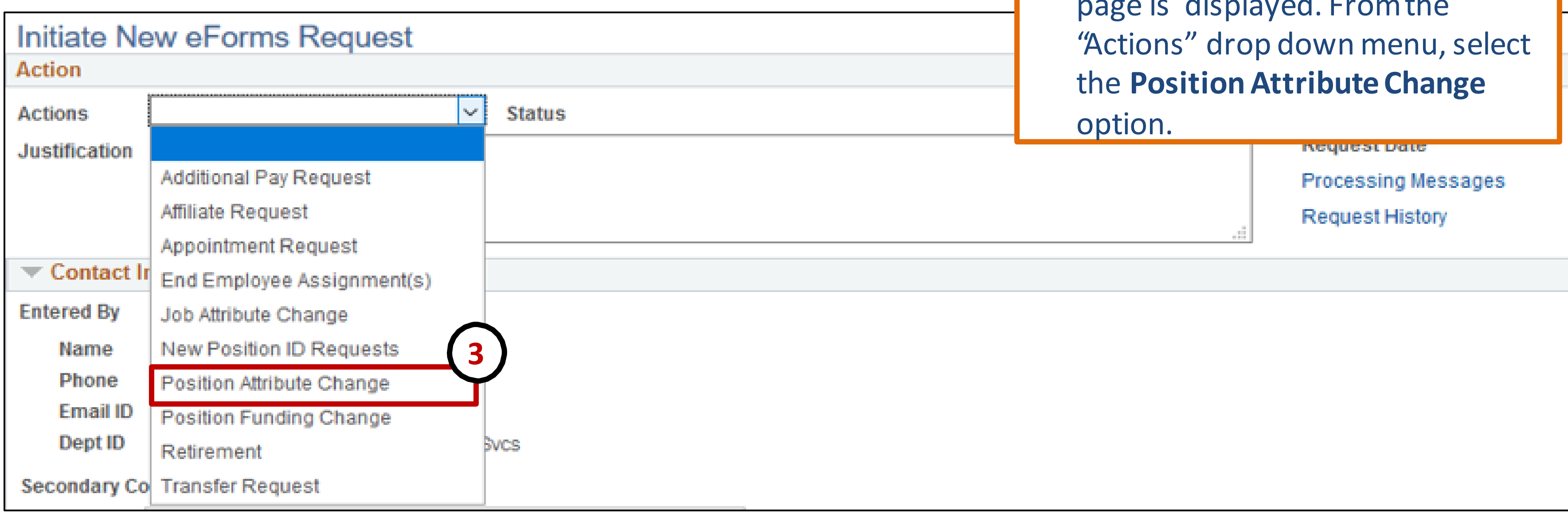
❖ System allows you to see the most recent position information

Attachments

- Approvals to modify a Staff position FTE (SEAR approval), eForm will be submitted by HR

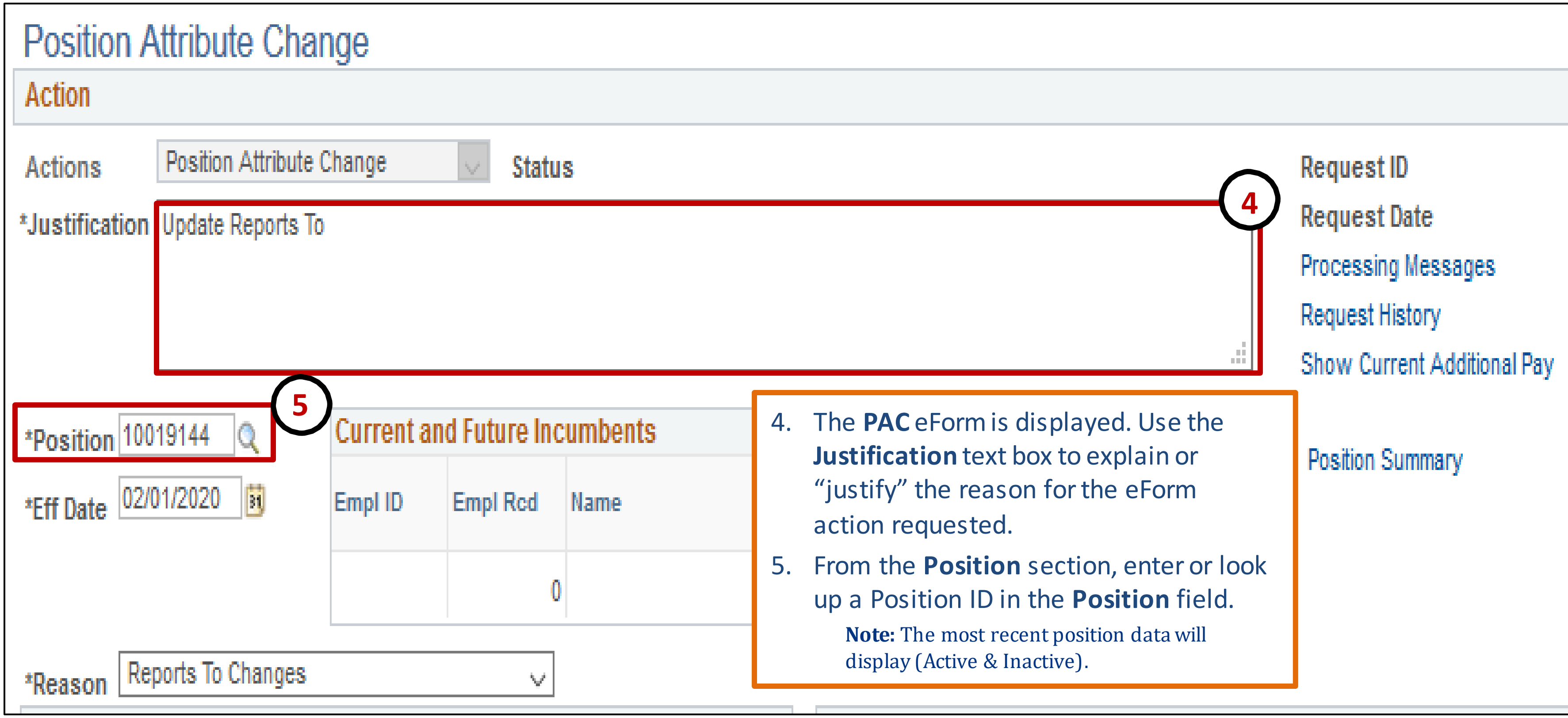
Initiating a PAC eForm





2. Select the **Create New Request** link.
3. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **Position Attribute Change** option.

Initiating a PAC eForm



4. The **PAC** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. From the **Position** section, enter or look up a Position ID in the **Position** field.

   Note: The most recent position data will display (Active & Inactive).

Initiating a PAC eForm

Current Position Information

Position	10019144 Profile ID ELP10019144
Effective Date	05/01/2019
Status	Active
Reason Code	Position Data Update
Company	University of Texas, El Paso UT EL Paso
Department	203000
Job Code	16343 Guard I
Job Title	Guard I
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Nonexempt
Empl Class	Classified
Sal Plan	UTEP Classified
Proposed Salary	
Budgeted Amt	20088.00
Acdmc Rnk	
FTE	1.000000
Stnd Hrs/Wk	40.00
Max Head Cnt	1
Reports To Pos	10021624
Reports To Name	Florencio Ramirez
Reports To Email	FRAMIREZ61@UTEP.EDU
Location Code	OTHR
Mail Drop ID	00631
Officer Code	Not Applicable

☐ Key Position
☑ Budgeted Position
☐ Permanently Budgeted

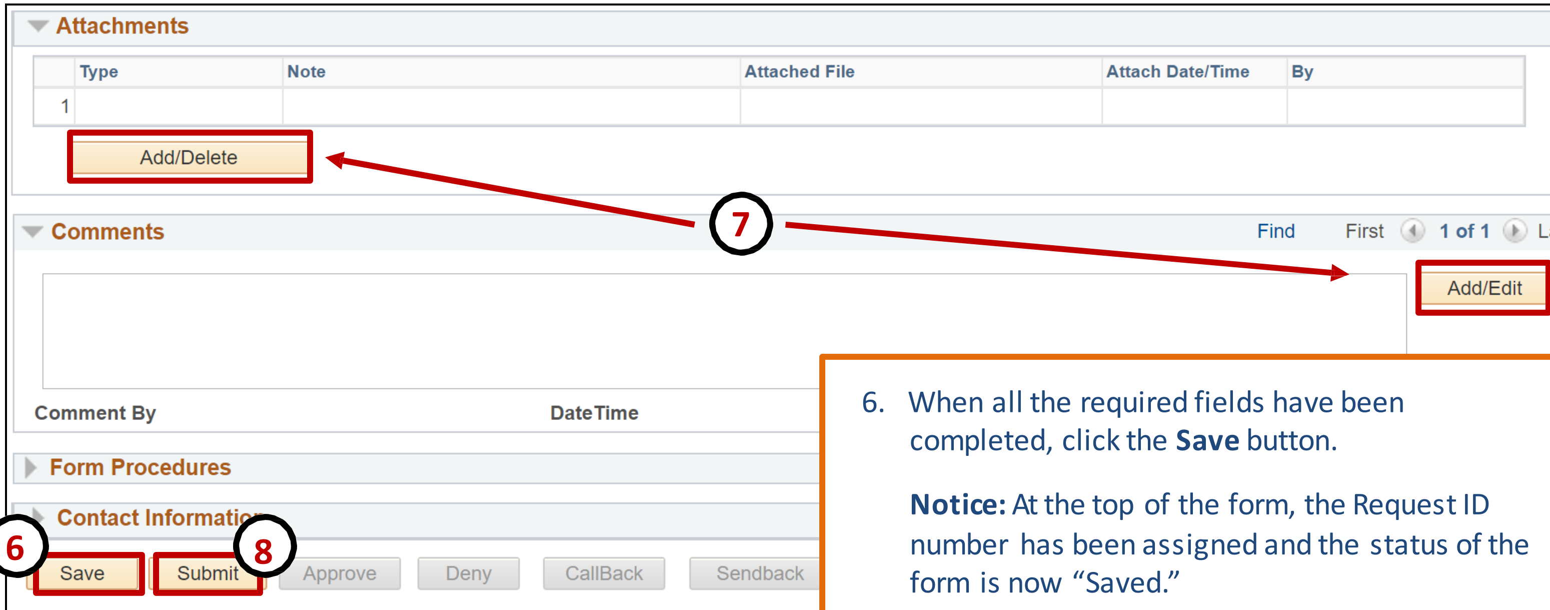
Proposed Position Information

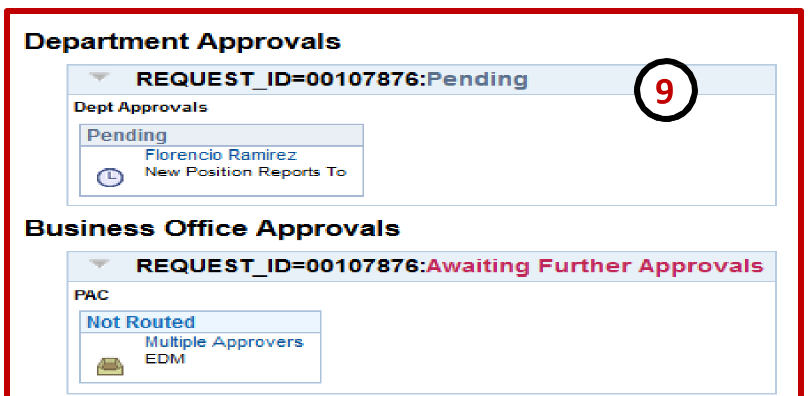
Position	10019144
Effective Date	05/01/2019
Status	Active
Reason Code	Position Data Update
Company	University of Texas, El Paso UT EL Paso
Position Title	203000 Police Department
Job Code	16343 Guard I
Job Title	Guard I
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Nonexempt
Empl Class	Classified
Sal Plan	UTEP Classified
Proposed Salary	
Budgeted Amt	20088.00
*FTE	1.000000
Stnd Hrs/Wk	40.00
Max Head Cnt	1
Reports To Pos	10021624
Reports To Name	Florencio Ramirez
Reports To Email	FRAMIREZ61@UTEP.EDU
Location Code	OTHR
Mail Drop ID	00631

☐ Key Position
☑ Budgeted Position
☐ Permanently Budgeted

- All Fields marked with an asterisk(*) need to be completed.
- Once the information has been entered the information in the grey fields will populate, based on the information currently in PeopleSoft.

Initiating a PAC eForm





6. When all the required fields have been completed, click the **Save** button.

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8. Click the **Submit** button.
9. 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.

PAC Workflow

PAC eForm

Creator
- PAC eForm is submitted by department initiator

Department Approvals
- Reports To

Backoffice Review
- EDM

Appointment Request

When to use

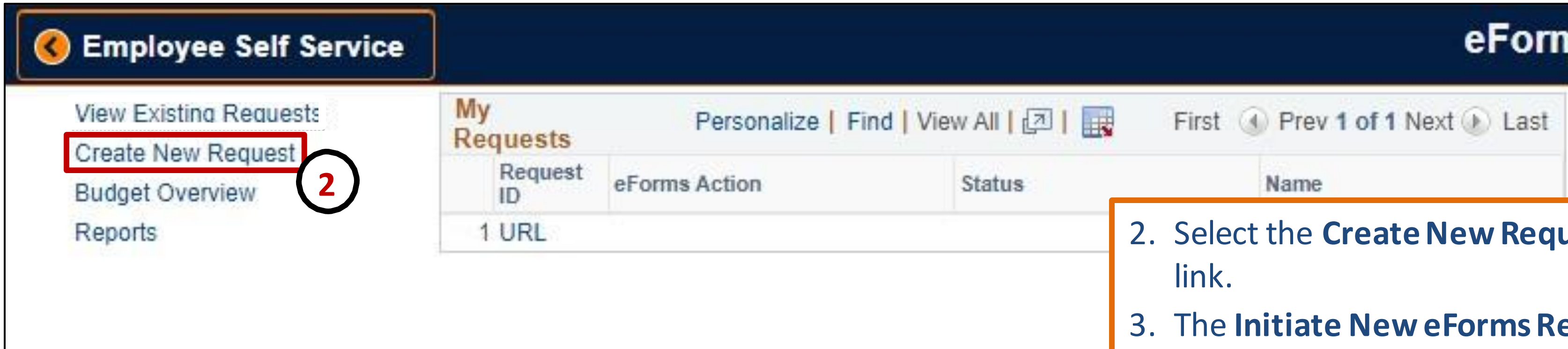
- New Employees
    - **Example -** Employee “A” will be starting as a brand new student employee.
- Employees who are returning who have been termed
    - **Example -** Employee “B” left UTEP in 2016 and is being rehired effective 2/1/2019

❖ System allows you to see the most recent assignments for the employee.

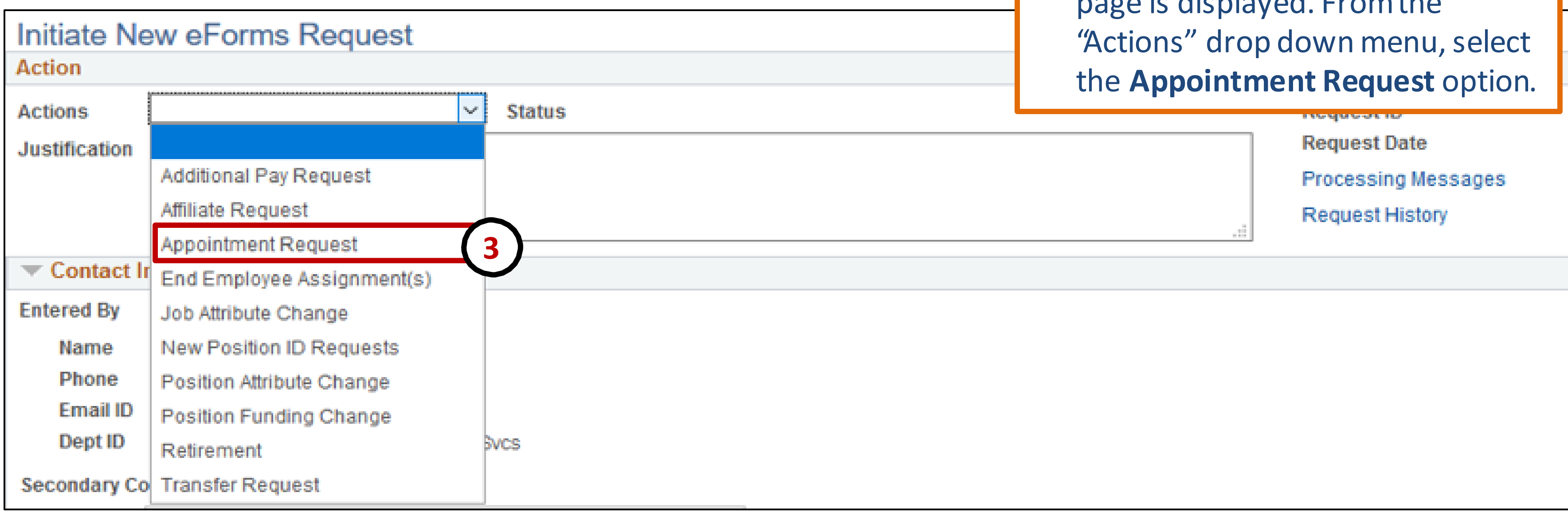
Attachments

- Required: Faculty Offer Letter if new Faculty, New Staff Appointments will be submitted by HR

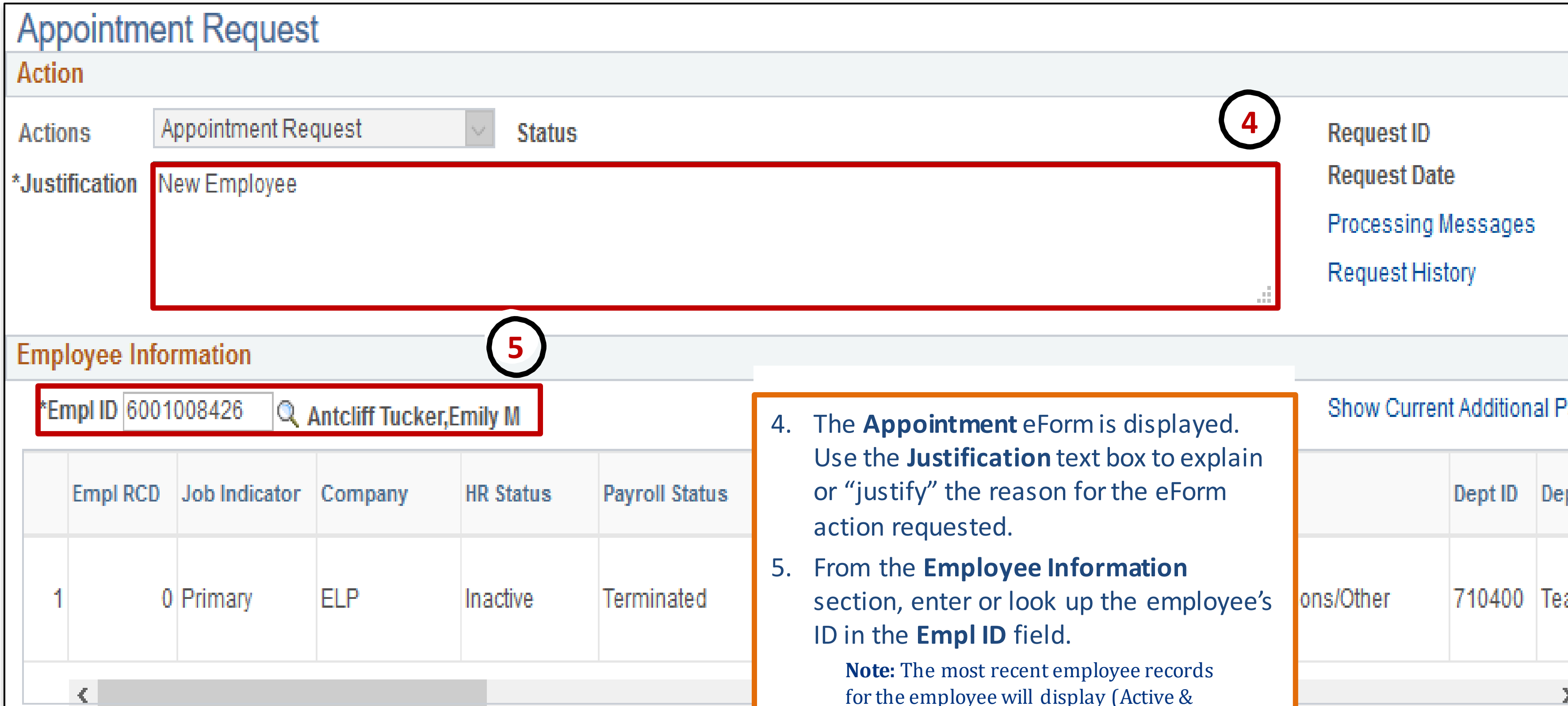
Initiating an Appointment Request eForm



2. 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.



Initiating an Appointment eForm



4. The **Appointment** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. From the **Employee Information** section, enter or look up the employee's ID in the **Empl ID** field.

   Note: The most recent employee records for the employee will display (Active & Inactive).

Initiating an Appointment eForm

Proposed Job Information

Empl Class	Student
Comp Frqncy	Semi-Monthly
FTE	0.625000
Stnd Hrs/Wk	25.00
*Semi-Monthly Hourly Rate	7.250000

Current Personal Information

*First Name	Emily
Middle	M
*Last Name	Antcliff Tucker
Birth Date	07/22/1962
*Home Email	EMILYM_ANTCLIFF_TUCKER@EARTHLINK.NE

Current Position Information

Position	10082638	Profile ID
Effective Date	09/01/2019	
Status	Active	
Company	University of Texas, El Paso	
Business Unit	UTEP1	UT EL Paso
Department	301100	Budget and Personnel Svcs
Job Code	10072	Undergraduate Assistant II
Job Title	Undergraduate Assistant II	
Budgeted Amt		
Acdmc Rnk		
FTE	0.475000	
Stnd Hrs/Wk	19.00	
Max Head Cnt	1	
Reports To Pos	10021052	
Reports To Name	Andrea Reveles	
Reports To	ARREVELES@UTEP.EDU	

6. All Fields marked with an asterisk(*) need to be completed.

Once the information has been entered the information in the grey fields will populate, based on the information currently in People Soft

Initiating an Appointment eForm

Funding will need to be provided from the first day of the appointment until the last day of the appointment.

Current Funding Find First 1 of 1 Last

Start Date 09/01/2019

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
	19021300	Budget Office Ope Expenses				100.000	

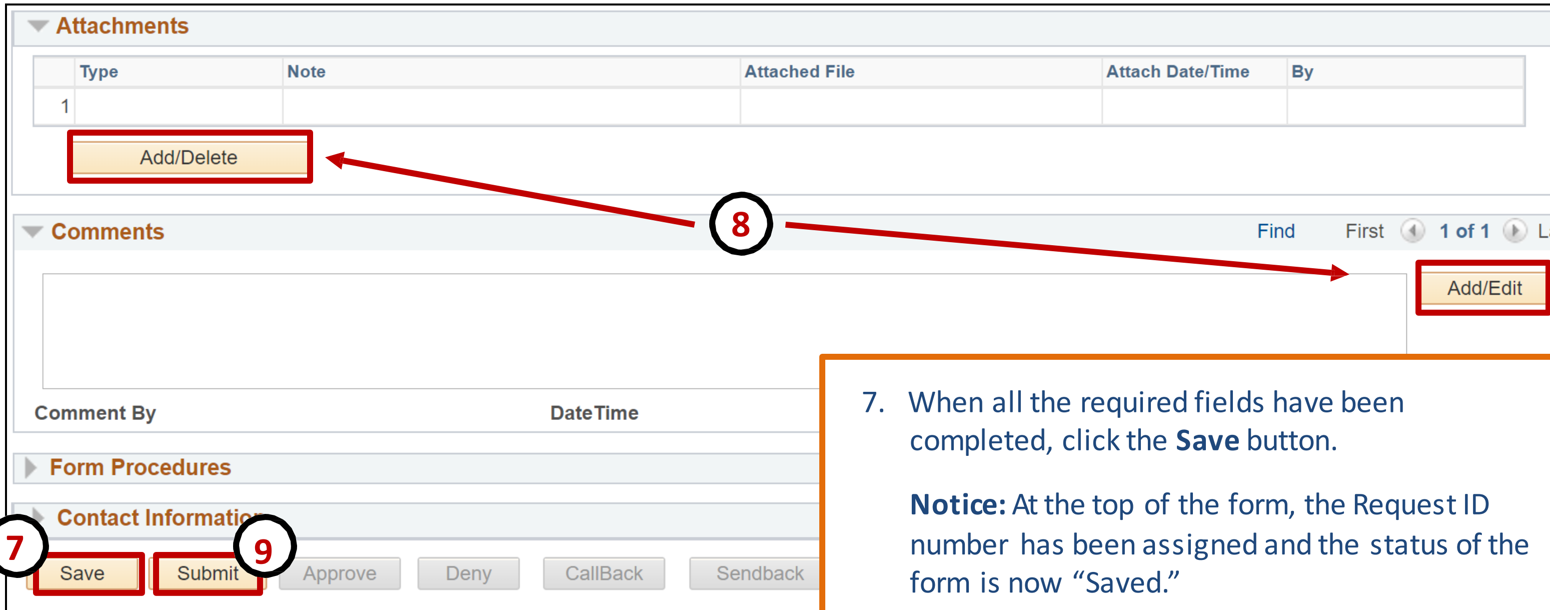
Proposed Funding Find First 1 of 1 Last

**Start Date 02/01/2020

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	19021300	Budget Office Ope Expenses				100.000	5,473.75

Initiating a Appointment eForm



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Appointment Workflow

Appointment eForm

Creator

- Appointment eForm is submitted by department initiator

Department Approvals

- Reports To
- Funding Approver

Backoffice Approvals

- Financial Aid/OCSEO
- Grant Support Center
- EDM

Job Attribute Change (JAC) Request

When to use

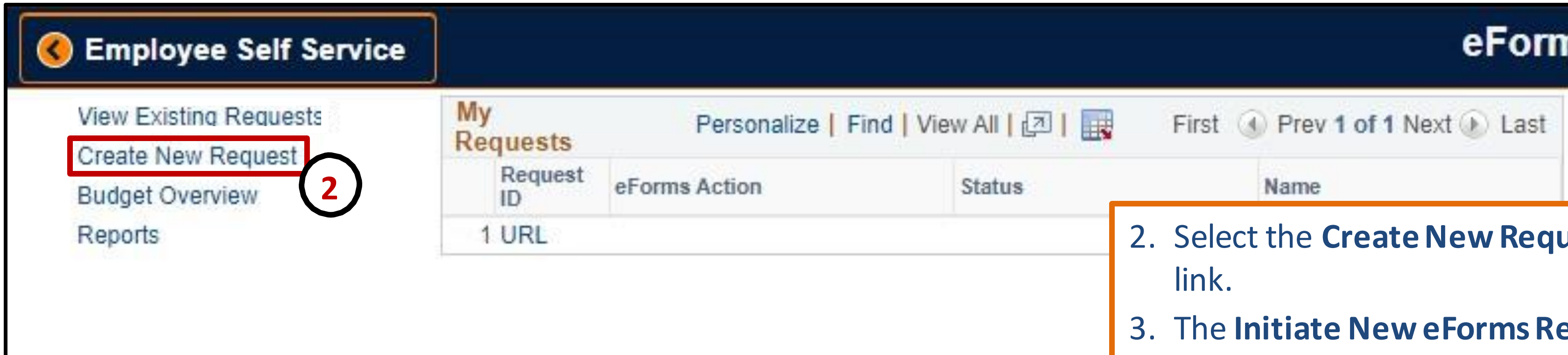
- For active employees needing their appointment extended OR
- A change in pay
  - Corrections
  - Merit/Out of Cycle Merit
  - Market Adjustment
  - Promotion

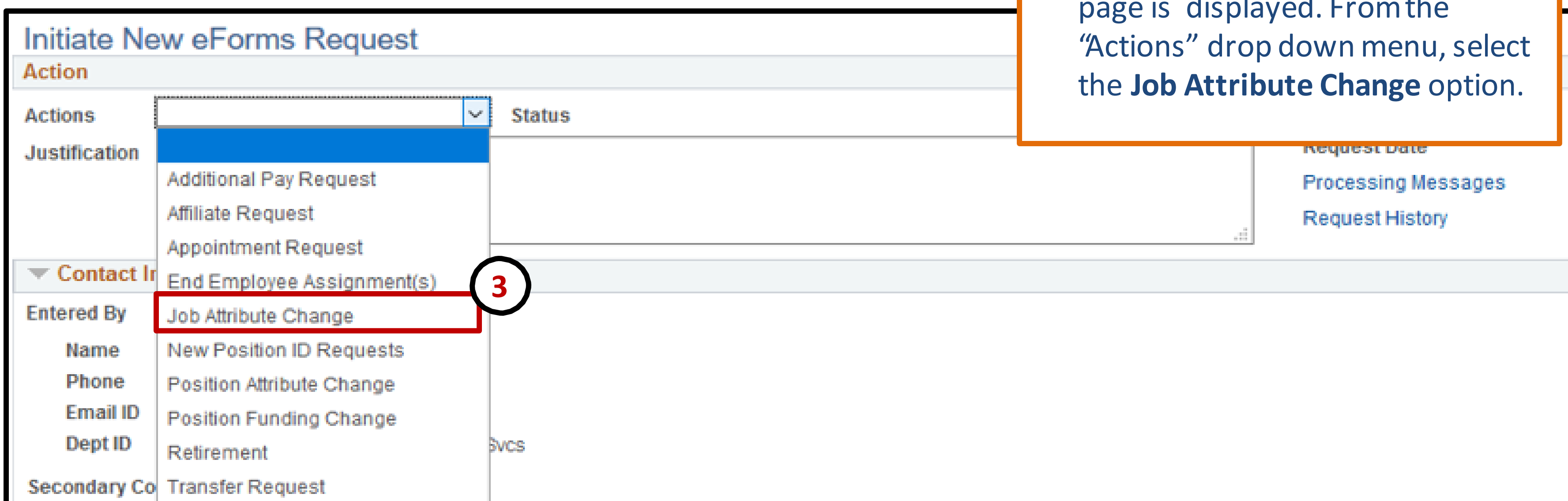
❖ System allows you to see the most recent Job information

Attachments

- Approvals to modify a Staff position FTE, this eForm should be submitted by HR (SEAR approval)
- Approvals to modify Faculty pay require an updated signed Offer Letter

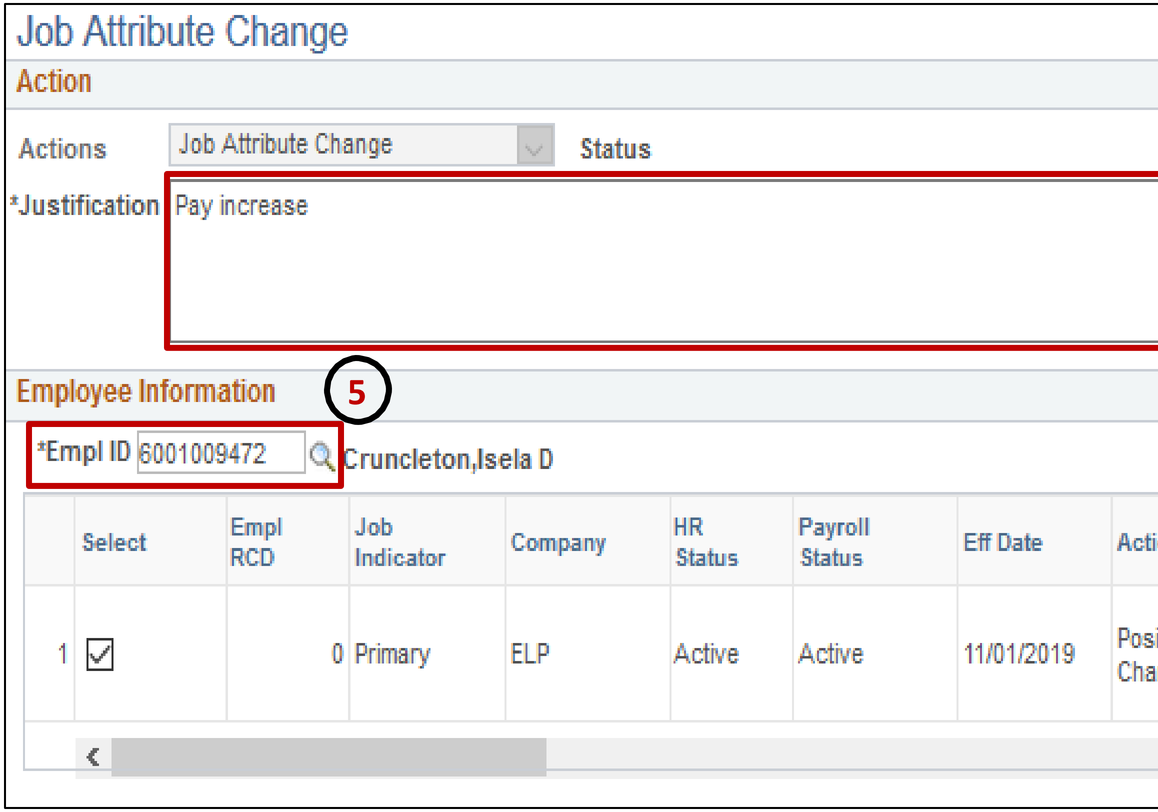
Initiating a JAC Request eForm





2. Select the **Create New Request** link.
3. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **Job Attribute Change** option.

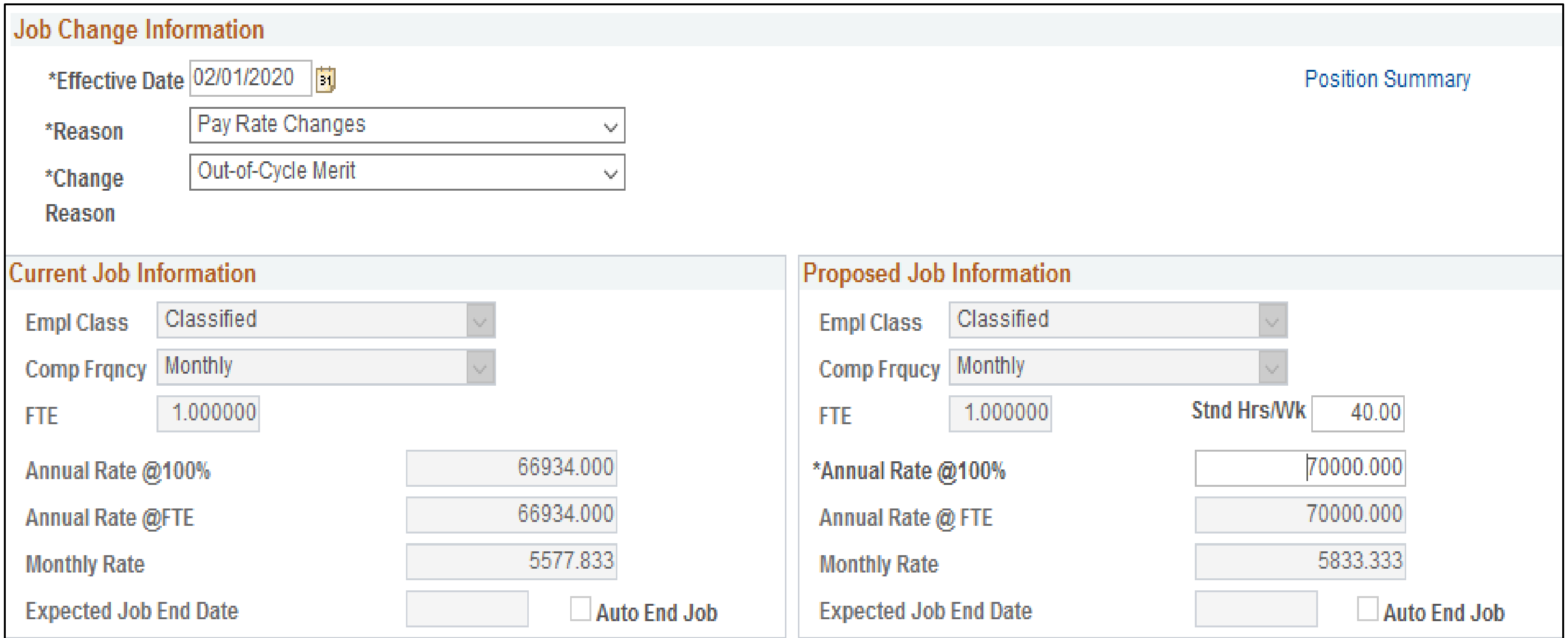
Initiating a JAC eForm



4. The **JAC** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. From the **Empl ID** section, enter or look up an **Empl ID** in the **Position** field.

   Note: The most recent Job data will display for Active employees only. Inactive employees can not be modified.

Initiating a JAC eForm



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PeopleSoft
THE UNIVERSITY OF TEXAS AT EL PASO

UT SHARE

Initiating an JAC Request eForm

Funding will need to be provided from the first day of the appointment until the last day of the appointment.

Current Funding Find First 1 of 1 Last

Start Date 09/01/2019

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
	19021300	Budget Office Ope Expenses				100.000	

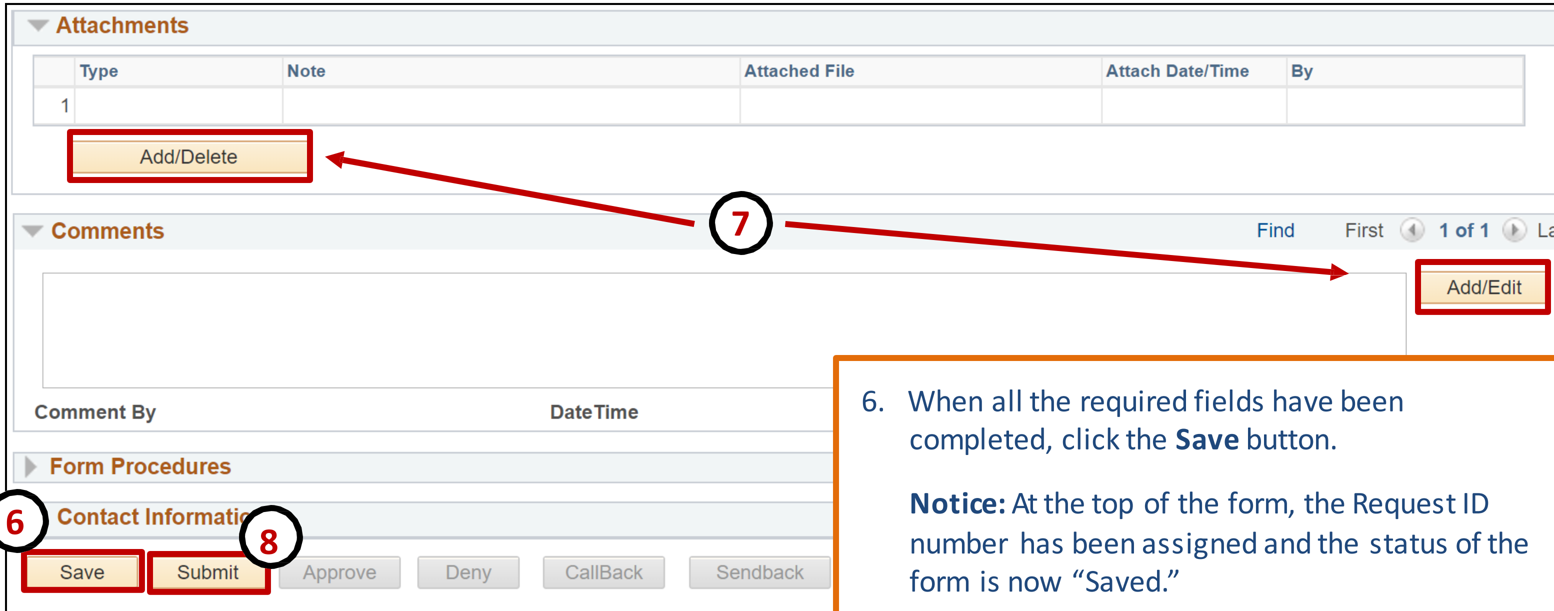
Proposed Funding Find First 1 of 1 Last

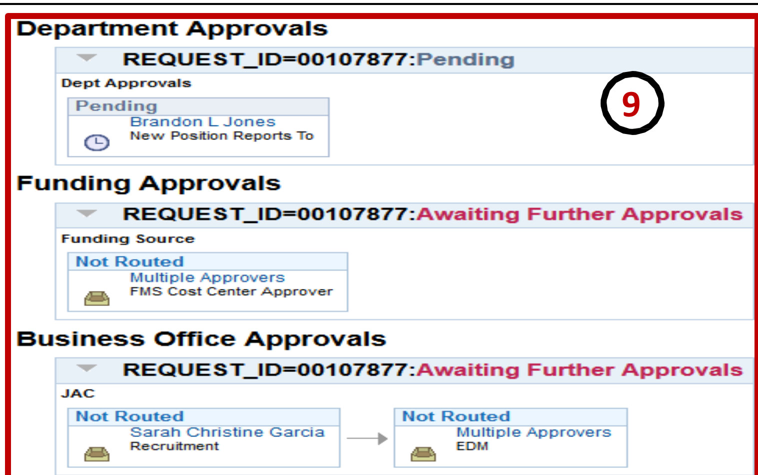
**Start Date 02/01/2020

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	19021300	Budget Office Ope Expenses				100.000	5,473.75

Initiating a JAC eForm





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PeopleSoft
The University of Texas at El Paso

UT SHARE

JAC Workflow

JAC eForm

Creator
- JAC eForm is submitted by department initiator

Department Approvals
- Reports To
- Funding Approver

Backoffice Review
- Financial Aid/OCSEO
- Grant Support Center
- EDM

Transfer Request

When to use

- A current active employee who is moving from:
  - one position to another
  - department to another

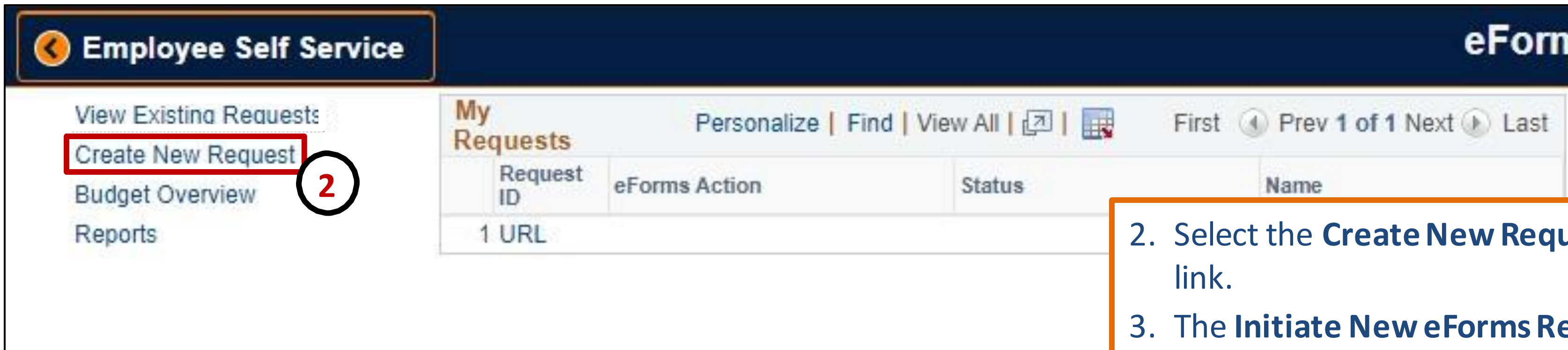
- **Example -** Employee Rosa will be moving from Position A as a Senior Analyst (10078956) to Position B as a Manager (10086359).

❖ System allows you to see the most recent Job information

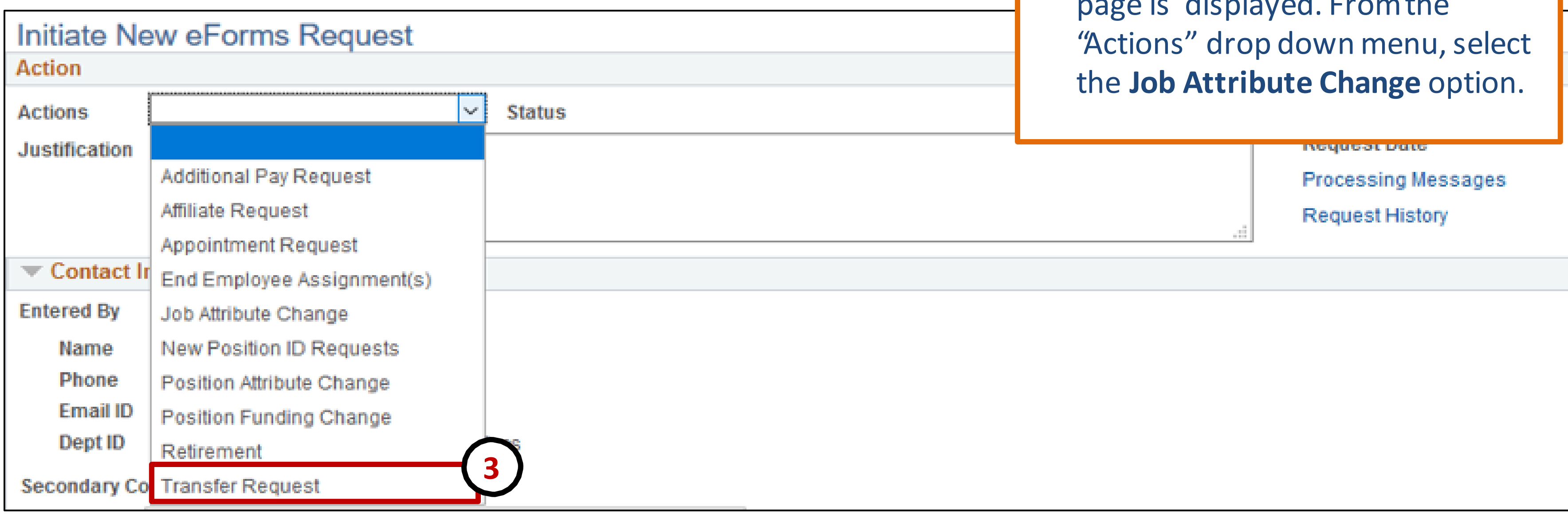
Attachments

- Approvals to hire Staff (SEAR); eForm should be submitted by HR

Initiating a Transfer Request eForm



2. Select the **Create New Request** link.
3. The **Initiate New eForms Request** page is displayed. From the "Actions" drop down menu, select the **Job Attribute Change** option.



PEOPLESOFT
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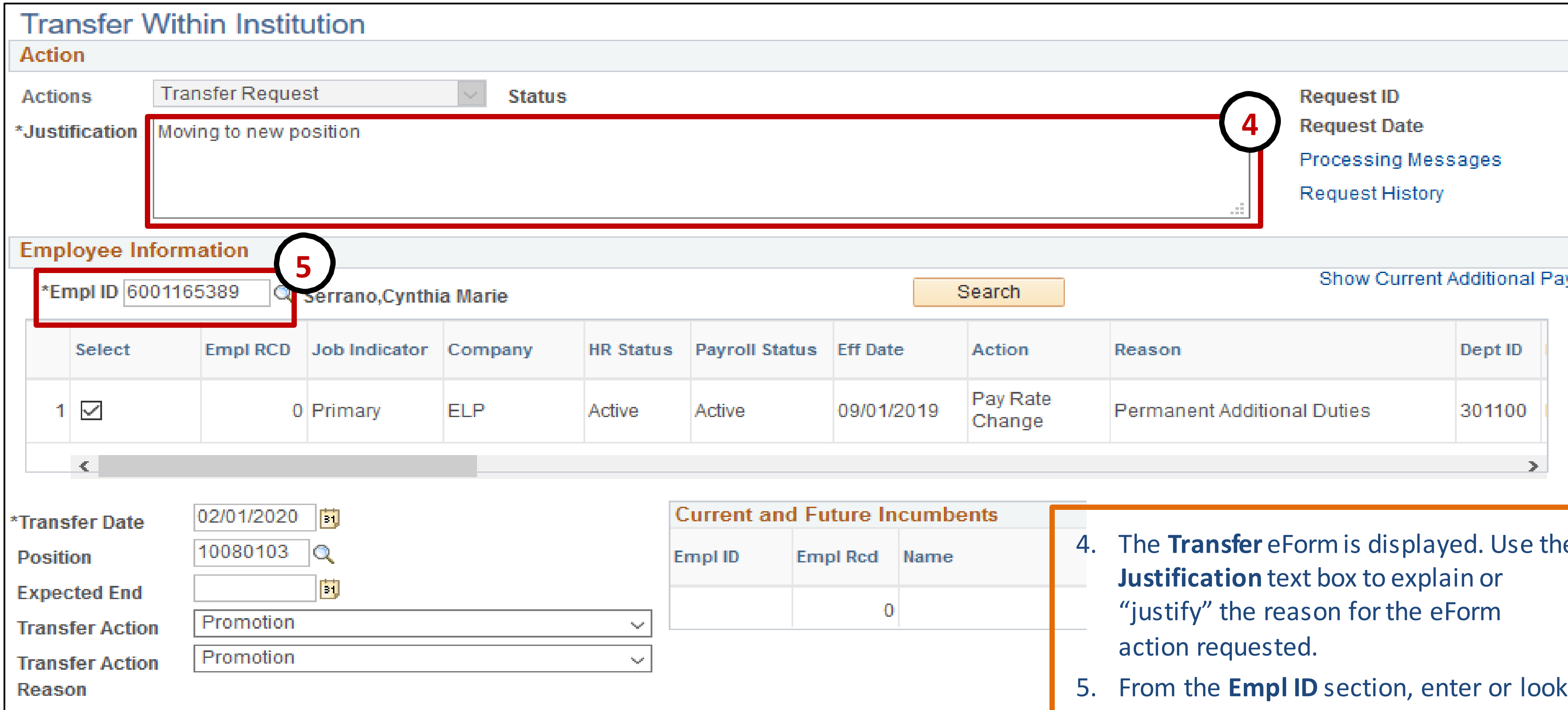
UT SHARE

Initiating a Transfer eForm


Transfer Within Institution

Action

Actions: Transfer Request
Status
*Justification: Moving to new position
Request ID
Request Date
Processing Messages
Request History

4

Employee Information

5

*Empl ID 6001165389 Serrano,Cynthia Marie
Search
Show Current Additional Pay

	Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1	☑	0	Primary	ELP	Active	Active	09/01/2019	Pay Rate Change	Permanent Additional Duties	301100

*Transfer Date: 02/01/2020
Position: 10080103
Expected End:
Transfer Action: Promotion
Transfer Action Reason: Promotion

Current and Future Incumbents

Empl ID	Empl Rcd	Name
	0	

4. The **Transfer** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. From the **Empl ID** section, enter or look up an **Empl ID** in the **Empl ID** field.

   Note: The most recent Job data will display for Active employees only. Inactive employees can not be modified.

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UT SHARE

Initiating a Transfer eForm

Current Position Information

Position	10080103
Profile ID	
Company	University of Texas, El Paso
Business Unit	UTEP1 UT EL Paso
Department	301100 Budget and Personnel Svcs
Job Code	10404 Assistant Director
Job Title	Assistant Director
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Exempt
Empl Class	Administrative / Profe
Sal Plan	UTEP Administrative Profssnl
Proposed Salary	
Budgeted Amt	90610.00
Acdmc Rnk	
FTE	1.000000
Stnd Hrs/Wk	40.00
Max Head Cnt	1
Reports To Pos	10018745
Reports To Name	Joanne Richardson
Reports To Email	JRICHARDSON@UTEP.EDU
Location Code	260
Mail Drop ID	
Officer Code	Not Applicable

Proposed Position Information

Position	10080103
Status	Active
Company	University of Texas, El Paso
Business Unit	UTEP1 UT EL Paso
Department	301100 Budget and Personnel Svcs
Job Code	10404 Assistant Director
Job Title	Assistant Director
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Exempt
Empl Class	Administrative / Profess
Sal Plan	UTEP Administrative Profssnl
Proposed Salary	
Budgeted Amt	90610.00
*FTE	1.000000
Stnd Hrs/Wk	40.00
Max Head Cnt	1
Reports To Pos	10018745
Reports To Name	Joanne Richardson
Reports To Email	JRICHARDSON@UTEP.EDU
Location Code	260
Mail Drop ID	
Officer Code	Not Applicable

- All Fields marked with an asterisk(*) need to be completed.
- Once the information has been entered the information in the grey fields will populate, based on the information currently in People Soft.
- The Position Data should be updated before this form is filled out and submitted as this information is populated from Position Data.

Initiating a Transfer eForm

- The Rate will need to be updated based on the approvals received.
- The proposed funding for staff will need to updated based upon the approvals received from SEAR.
- The proposed funding for Faculty & Students will be approved based on allowable available funds.

Proposed Job Information

Empl Class: Administrative / Professional
Comp Frqncy: Monthly
FTE: 1.000000 Stnd Hrs/Wk:
*Annual Rate @100%
Annual Rate @FTE
Proposed Annualized Rate
Monthly Rate @FTE

Current Funding Find First 1 of 1 Last

Start Date 09/01/2019

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021300	BUDGET OFFICE				100.000	
CDA	19021300	Budget Office Ope Expenses				100.000	

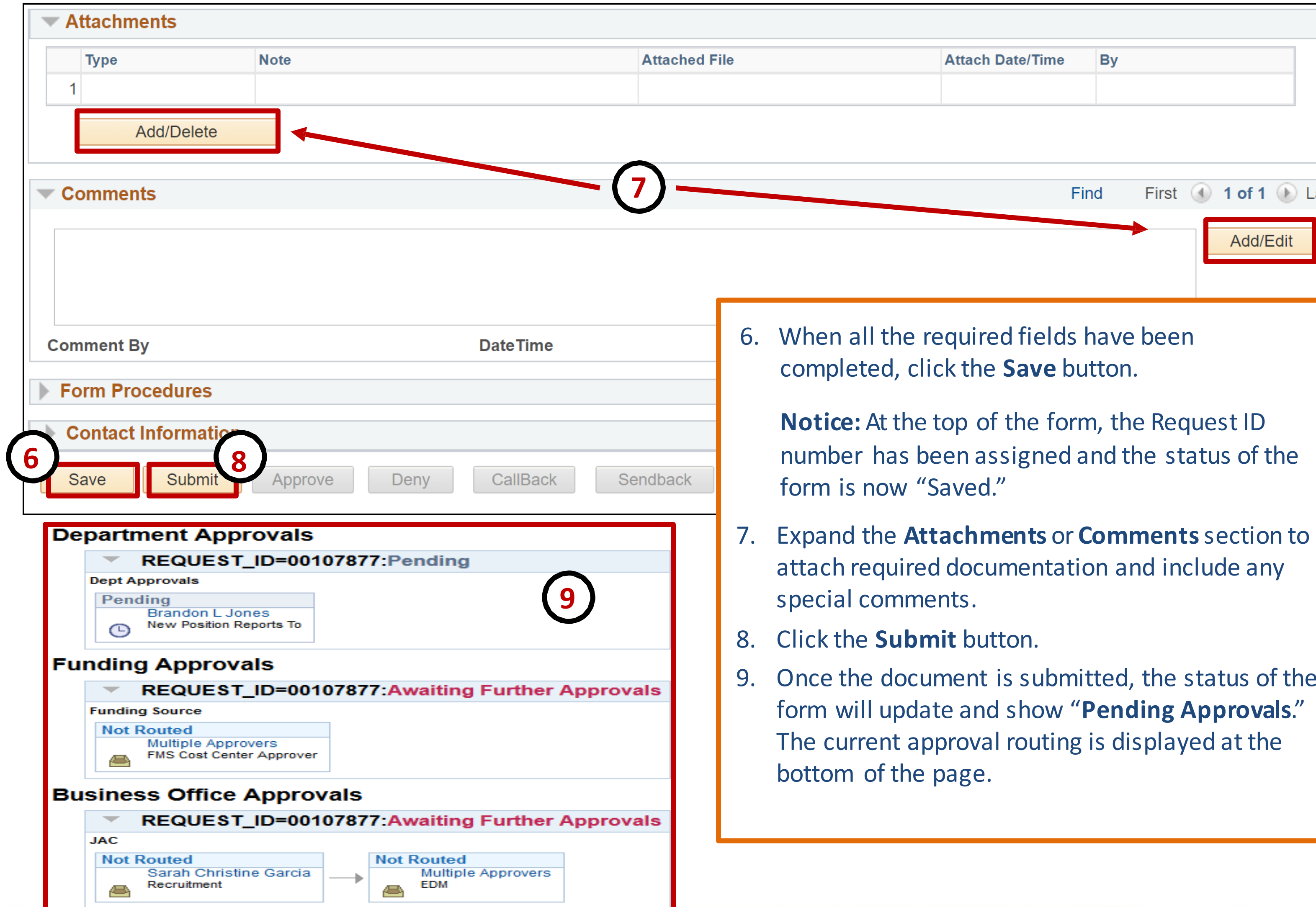
Proposed Funding Find First 1 of 1 Last

*Start Date 09/01/2019

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021300	BUDGET OFFICE				100.000	
CDA	19021300	Budget Office Ope Expenses				100.000	

Initiating a Transfer eForm



6. When all the required fields have been completed, click the **Save** button.

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

7. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
8. Click the **Submit** button.
9. 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.

Transfer Workflow

JAC eForm

Creator

- Transfer eForm is submitted by department initiator

Department Approvals

- Reports To
- Funding Approver

Backoffice Review

- Financial Aid/OCSEO
- Grant Support Center
- EDM

eForm Warning Messages

- **General Warning-** Warning message on duplicate request for a Position #/Empl ID.
- **Hard Stop-** Error message for missing required fields and/or attachments, or date errors.

Budget Checking

Budget Checking is available for the following new eForms:

- Appointment Request
- Transfer

Similar to the Position Funding Change eForm, the Check Funds button will be available and will allow users to check the availability of funds of any cost centers and/or project IDs indicated on the funding section before submitting/approving. The form will automatically check funding upon saving.

Check Funds Recap

Once the "Check Funds" button is selected, the Review Available Funds* page will appear. Information regarding the availability of funds and eForms routing for approval/saved will be posted for the respective cost center/grant selected:

Review Available Funds

Cost Center EGDL03 ILT -NTT SALARIES

Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	0.00	0.00	0.00	0.00	0.00	0.00	26,666.67	0.00	26,666.67	-26,666.67
00001052	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	15,000.00	0.00	15,000.00	0.00
00001069	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	5,000.00	0.00
00001101	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	6,666.67	0.00	6,666.67	0.00
	A2000	Faculty & TA Salaries	603,367.00	0.00	-472,792.15	214,946.01	0.00	-84,371.16	3,750.00	0.00	3,750.00	-88,121.16
	50205	SW Non Tenure Track	0.00	0.00	0.00	0.00	0.00	0.00	3,750.00	0.00	3,750.00	0.00
	A3000	Payroll Related Costs	114,901.67	0.00	-113,266.96	1,634.71	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		718,268.67	0.00	-586,059.11	216,580.72	0.00	-84,371.16	30,416.67	0.00	30,416.67	-114,787.83

Color Guide of **Review Available Funds***

Color	Description
White	Budgetary Account is not in overdraft
Yellow	Budgetary Account is in overdraft
Blue	Amount for the current request
Pink	Amounts for other pending eForms requests
Red	Cost Center or Project is in overdraft

Funding End Date

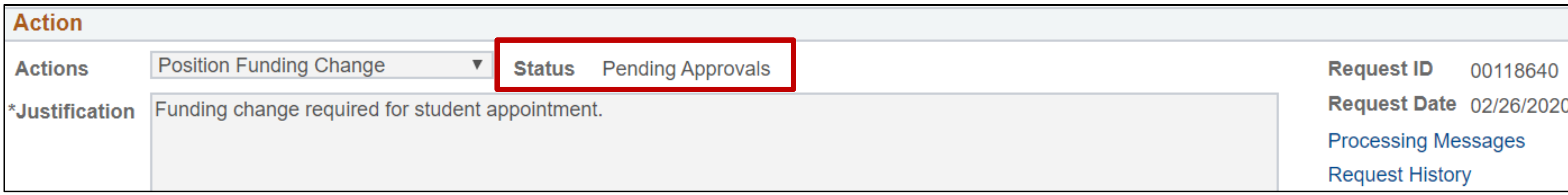
DBT Requires End Dates for:

- Positions funded by grants
- Faculty not on contract
- All monthly students
- Temporary staff

Button Description

Button	Access	Action
Save	Creators	Saves latest changes added to the document
Submit	Creators	Sends document to the next approver in workflow, form cannot be modified
CallBack	Creators	Recalls document back to the creator for modifications
Cancel	Creators	Creator terminates the document and makes it unavailable for processing
Copy	Creators	Creates an exact copy of a document with a new Request ID, the new form can be modified as needed.
Approve	Approvers	Approves document as is with no adjustments
Deny	Approvers	Approver terminates the document and makes it unavailable for processing
Sendback	Approvers	Approver returns document to creator for modification
Check Funds	Creators & Approvers	Allows users to check the availability of funds of any funding source entered on the proposed funding section

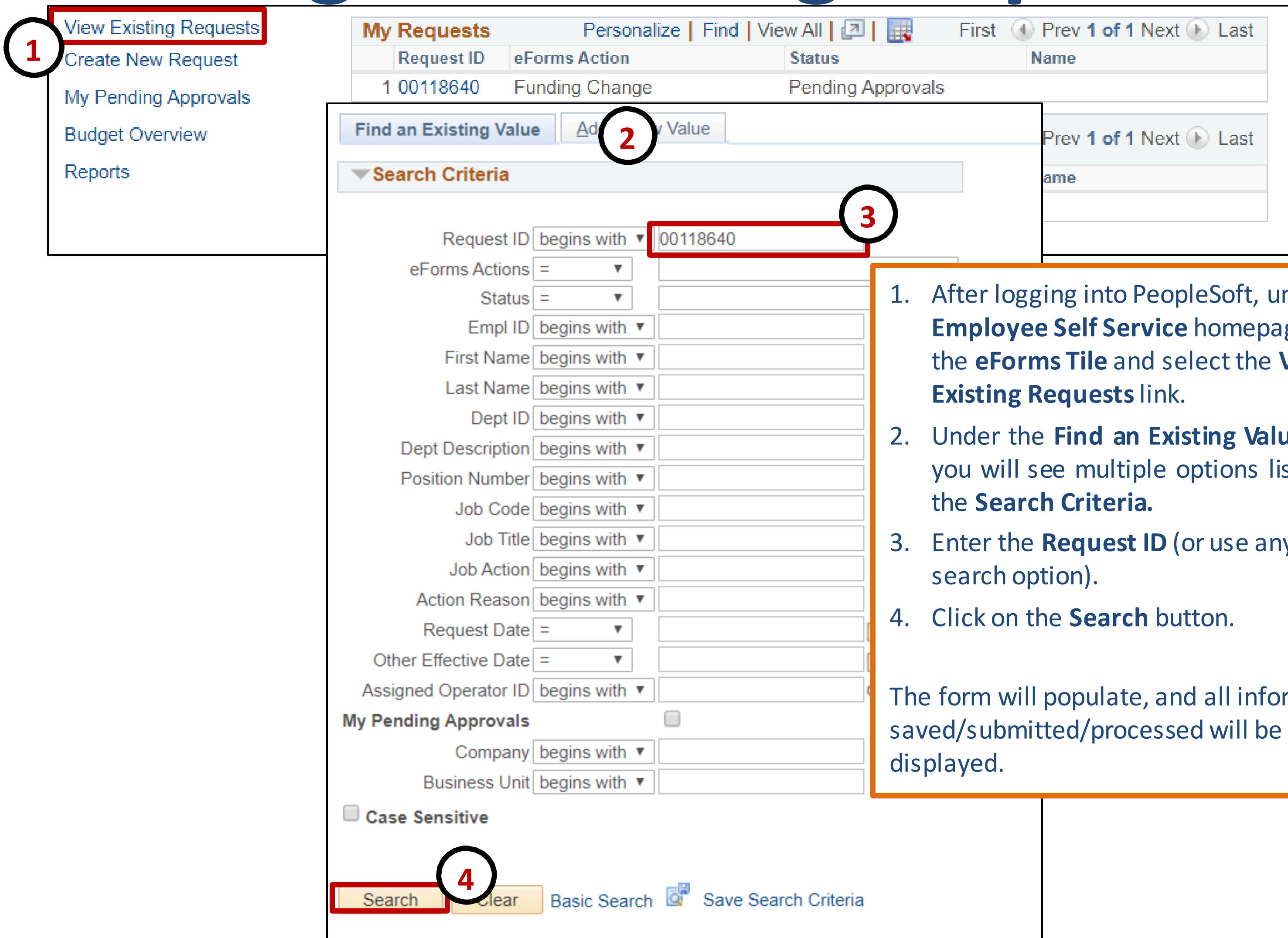
eForm Status



eForm Status*	Description
Saved	Form has been saved and is pending with the creator for submission
Pending Approvals	Form has been submitted and is routing for approval
Call Back for Revision	Form was submitted but called back by the creator for modification
Sent Back for Revision	Form has been sent back by the approver and needs to be modified by the creator
Cancelled	Form has been cancelled by the creator and can no longer be processed
Denied	Workflow has been cancelled by the approver and can no longer be processed
Approved	Form has been fully approved, but not processed
Completed	Form has been processed and job record has been updated*
Completed Manually	Form was processed by a back office user and job record has been updated

*** For DBT Retros, keep in mind that even if the form shows a "Completed" status, it still needs to be processed with the next payroll run in order for it to expense to the requested funding source.**

Searching for Existing Requests

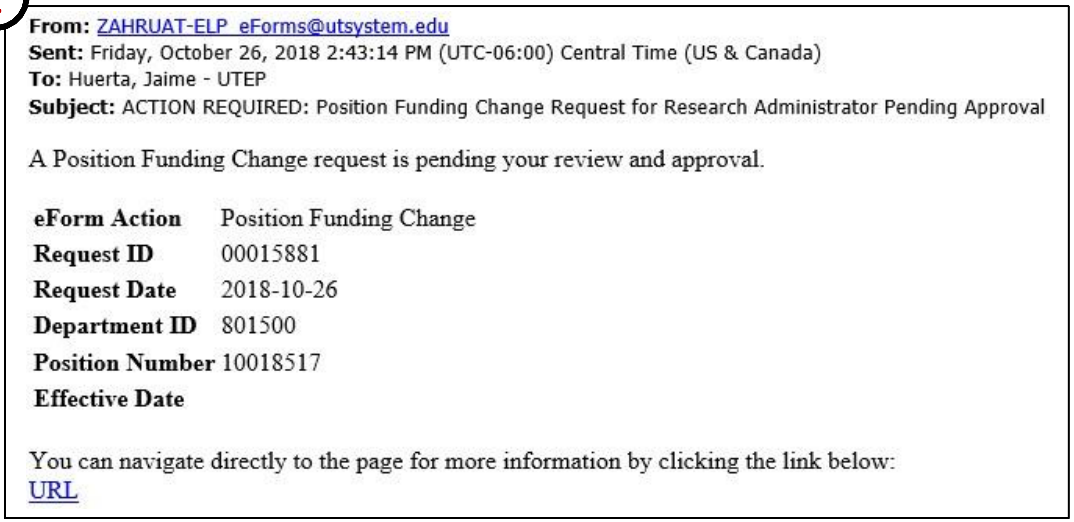


1. After logging into PeopleSoft, under the **Employee Self Service** homepage select the **eForms Tile** and select the **View Existing Requests** link.
2. Under the **Find an Existing Value** tab, you will see multiple options listed in the **Search Criteria.**
3. Enter the **Request ID** (or use any other search option).
4. Click on the **Search** button.

The form will populate, and all information saved/submitted/processed will be displayed.

Approving eForms

1



From: ZAHRUAT-ELP_eForms@utsystem.edu
Sent: Friday, October 26, 2018 2:43:14 PM (UTC-06:00) Central Time (US & Canada)
To: Huerta, Jaime - UTEP
Subject: ACTION REQUIRED: Position Funding Change Request for Research Administrator Pending Approval

A Position Funding Change request is pending your review and approval.

eForm Action	Position Funding Change
Request ID	00015881
Request Date	2018-10-26
Department ID	801500
Position Number	10018517
Effective Date	

You can navigate directly to the page for more information by clicking the link below:
URL

Two approval methods:

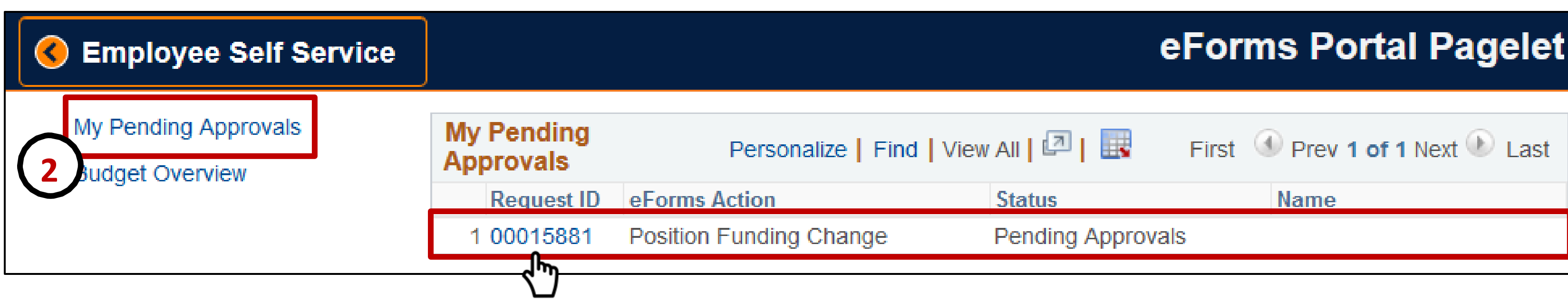
1) "E-MAIL" method:

- Document is sent to Outlook.
- Log into PeopleSoft to review document information.
- Click hyperlink at bottom of email to open the document.

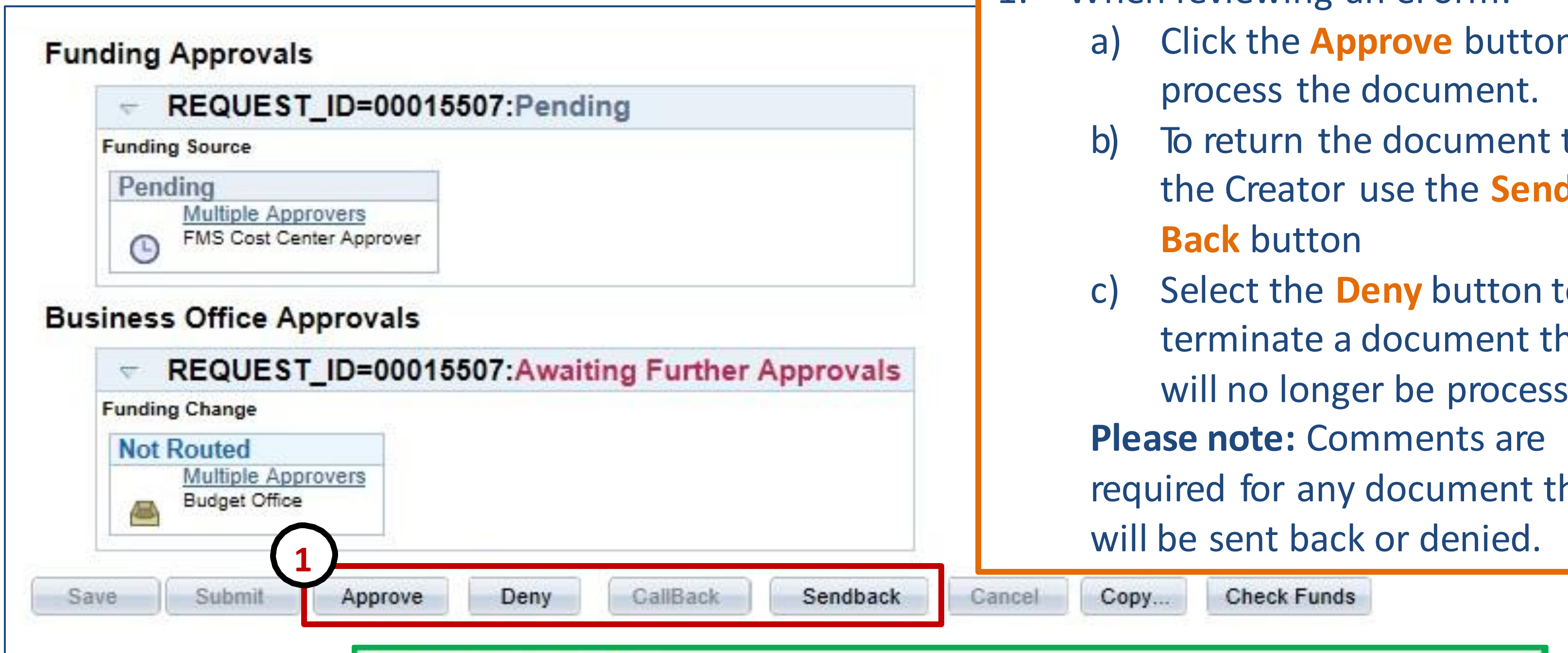
2) "eForms section" method:

- Log into PeopleSoft, from the Employee Self Service homepage select the **eForms Tile**.
- Under **My Pending Approvals**, select the document to review/approve.

2



Approving eForms



1. When reviewing an eForm:
   a) Click the **Approve** button to process the document.
   b) To return the document to the Creator use the **Send Back** button
   c) Select the **Deny** button to terminate a document that will no longer be processed.

   Please note: Comments are required for any document that will be sent back or denied.

PeopleSoft Tips

- **If Approvers are having trouble, create Help Desk ticket and describe issue:**

  1) The Approver receives a "**No Security Access**" type message
  2) The Approver cannot see the "**Approve**" button
  3) The "**Approve**" button is grayed out/ or locked
  4) The system seems to be stuck processing or is very slow

eForm Reminders

- **Transfers**: When transferring an employee, the receiving department should submit the Transfer eForm

- **Separations**: Separation forms are no longer required for transferring employees

- **Positon Changes**: If position changes are required the PAC eForm should be submitted before submitting a JAC, Transfer, or Appointment Request eForm.

eForm Tips

- Submit a Help Desk ticket for any technical issues related to eForms
- For general questions on the processing of forms contact EDM via e-mail at EDMQA@UTEP.EDU

Questions

Thank You

PeopleSoft

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