



# Hiring eForms (Phase II)



# Agenda

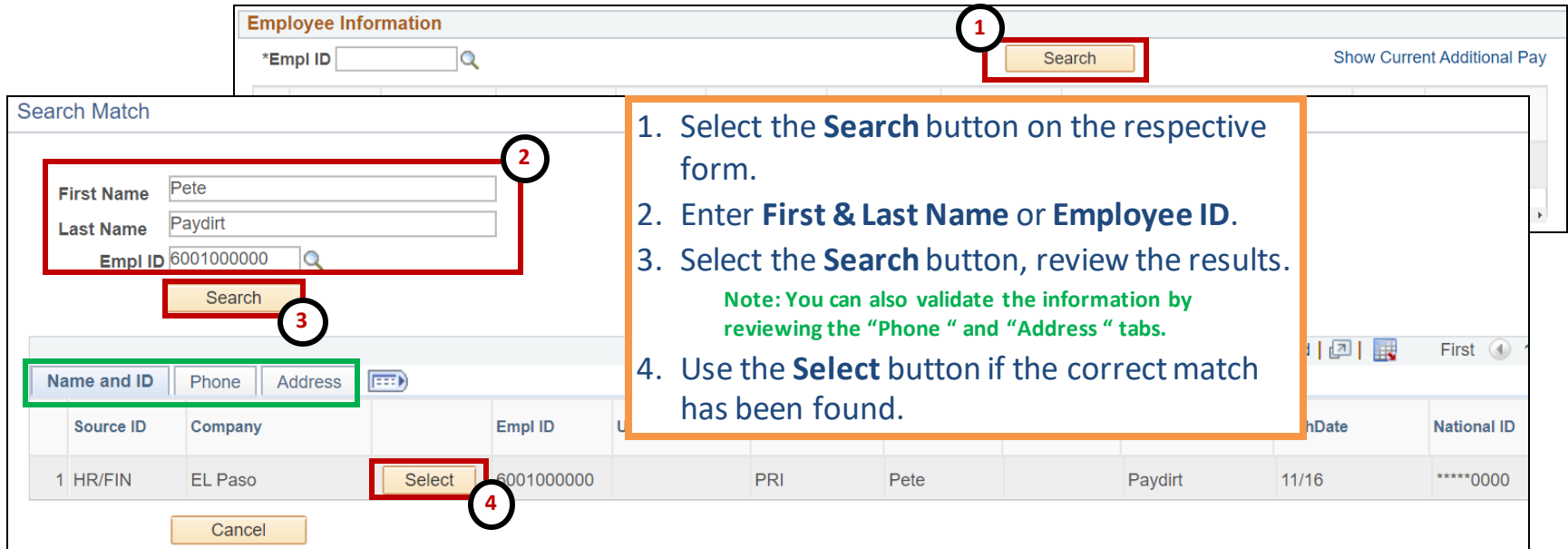
- eForms Overview
- New eForms:
  - Affiliate
  - New Position
  - Appointment (New Hire/Rehire)
  - Position Attribute Change
  - Job Attribute Change
  - Transfer
- Approving eForms
- eForm Tips

# 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



**Employee Information**

\*Empl ID   Show Current Additional Pay

**Search Match**

First Name   **2**

Last Name

Empl ID   **3**

**Name and ID** | Phone | Address

Source ID	Company	Empl ID	U	hDate	National ID
1 HR/FIN	EL Paso	6001000000	PRI	Pete	Paydirt 11/16 *****0000

**4**

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

Employee Self Service

<b>Payroll and Compensation</b> 	<b>Talent Profile</b> 	<b>Personal Details</b>	<b>My News Content</b>
<b>Benefits Summary</b> 	<b>Performance</b>  Next Due Date <b>03/31/2019</b>	<b>Time and Attendance</b> 	<b>eForms</b> 
<b>Job Data</b> 	<b>My Reports</b> 	<b>Financials Approvals</b>  1	<b>HRMS Approvals</b>  0

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



# Search Match

**Employee Information**

\*Empl ID   Show Current Additional Pay

**Search Match**

First Name

Last Name

Empl ID

**Name and ID** | Phone | Address

Source ID	Company	Empl ID	U	hDate	National ID
1 HR/FIN	EL Paso	6001000000	PRI	Pete	Paydirt 11/16 *****0000

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.**

# 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

**Employee Self Service** eForm

View Existing Requests  
**Create New Request** 1  
Budget Overview  
Reports

**My Requests** Personalize | Find | View All | First ◀ Prev 1 of 1 Next ▶ Last

Request ID	eForms Action	Status	Name
1 URL			

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.

**Initiate New eForms Request**

**Action**

Actions	Status
<b>Justification</b>	
Additional Pay Request	
<b>Affiliate Request</b> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">2</span>	
Appointment Request	
End Employee Assignment(s)	
<b>Contact Information</b>	
Entered By	
Name	
Phone	
Email ID	
Dept ID	
Secondary Co	
Job Attribute Change	
New Position ID Requests	
Position Attribute Change	
Position Funding Change	
Retirement	Svcs
Transfer Request	

Request Date  
Processing Messages  
Request History

# Initiating an Affiliate Request eForm

**Affiliate Request**

**Action**

Actions:  Status

Justification:

Request ID  
Request Date  
Processing Messages  
Request History

Empl ID

**Search Match**

First Name:  Last Name:  SSN:

Empl ID:  Company:  Job Opening ID:

Name and ID	Phone	Address		Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthDate
1 HR/FIN	Arlington	<input type="button" value="Select"/>		1000816837		PRI	Emily	Ann	Curtis	10/08
2 HR/FIN	Arlington	<input type="button" value="Select"/>		1001509222		PRI	Emily	Dianne	Clasen	02/13
3 HR/FIN	EL Paso	<input type="button" value="Select"/>		6001254061		PRI	Emiliano		Castillo	10/11

- The **Affiliate Request** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.
- 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

Empl ID 6001254061

**Proposed Personal Information** 7

\*First Name

Mid Name

\*Last Name

\*Address 1

Address 2

\*City

\*State

\*Zip

\*County

\*Country

\*Email

\*Phone

Hi Educ Lv

**Job Information** 8

\*Start Date

\*Expected End

\*Position   President

Location Code

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

**Attachments**

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

**Comments** Find First 1 of 1 La

Add/Edit

Comment By DateTime

**Form Procedures**

**Contact Information**

Save Submit Approve Deny CallBack Sendback

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.

**Department Approvals**

REQUEST\_ID=00107826:Pending View/Hide Comments

Dept Approvals

Pending

Adrian Rodriguez  
New Position Reports To

**Comments**

**Business Office Approvals**

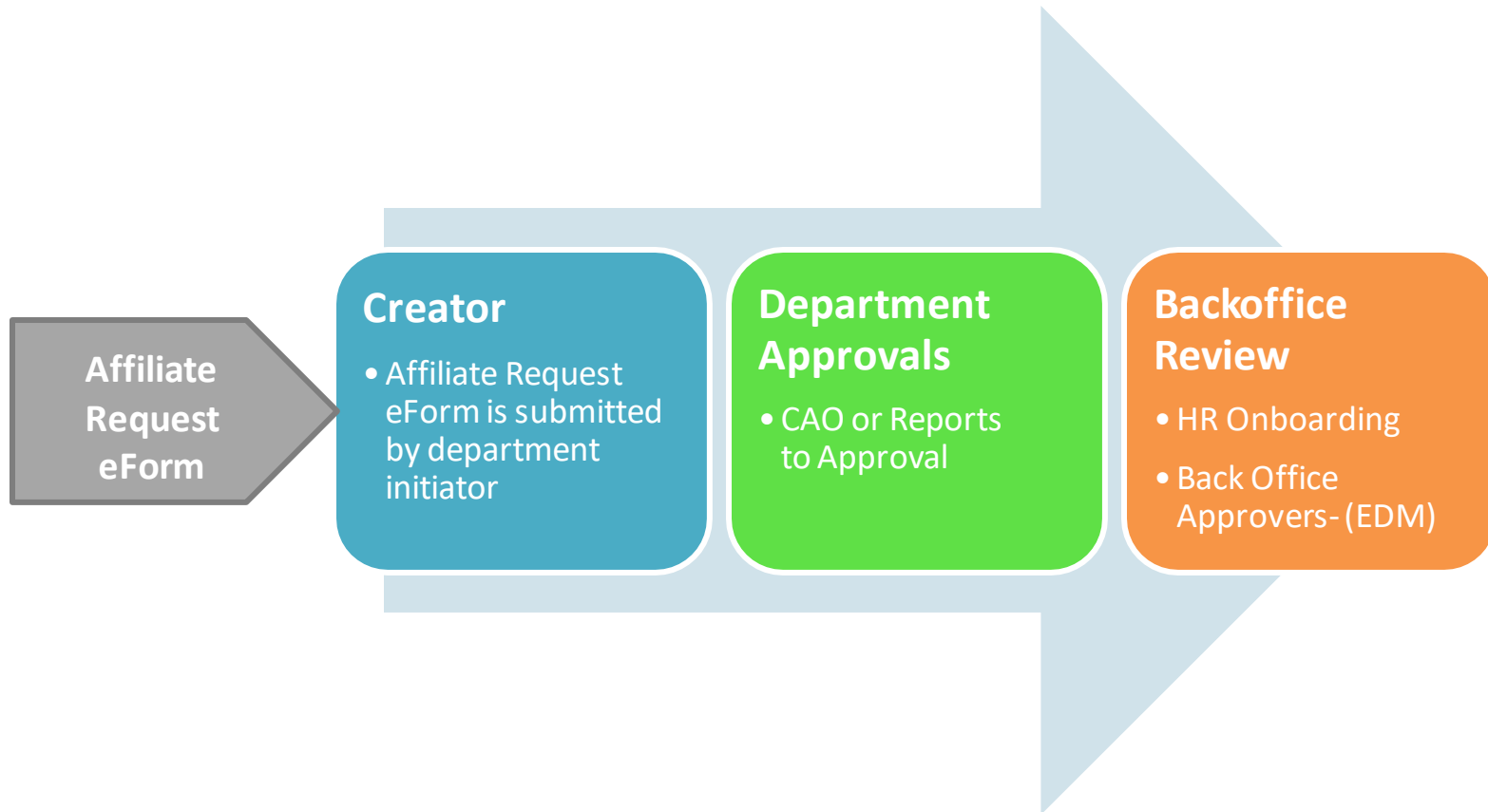
REQUEST\_ID=00107826:Awaiting Further Approvals

POI

Not Routed Multiple Approvers Onboarding

Not Routed Multiple Approvers EDM

# Affiliate Request Workflow





# 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

Employee Self Service eForm

View Existing Requests  
**Create New Request**  
Budget Overview  
Reports

My Requests Personalize | Find | View All | First Prev 1 of 1 Next Last

Request ID	eForms Action	Status	Name
1 URL			

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.

Initiate New eForms Request

Action

Actions Justification Status

Additional Pay Request  
Affiliate Request  
Appointment Request  
End Employee Assignment(s)  
Job Attribute Change  
**New Position ID Requests**  
Position Attribute Change  
Position Funding Change  
Retirement  
Transfer Request

Contact Information

Entered By Name Phone Email ID Dept ID Secondary Co

Request Date  
Processing Messages  
Request History

# Initiating a New Position eForm

## New Position Requests

**Action**

Actions New Position ID Requests Status

\*Justification 4

Request ID

Request Date

Processing Messages

Request History

Position Eff Date 5 02/27/2020

**Proposed Position Information**

Position

Status Active

UT EL Paso

\*Department 6 301100 Budget and Personnel Svcs

\*Job Code 6 10405 Manager

Job Title

Reg/Temp Regular

Full/Part Time Full-Time

FLSA Status Exempt

Empl Class Administrative / Professi

Sal Plan UTEP Administrative Profssnl

\*FTE

**Additional Information**

Proposed Rate 7

\*Std Hrs/Wk 7

\*Reports To Pos 7

Reports To Name

Reports To Email

\*Location Code 7

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 **Std Hrs/Wk, Reports To, & Location Code, and Proposed Rate** will need to be updated as well.

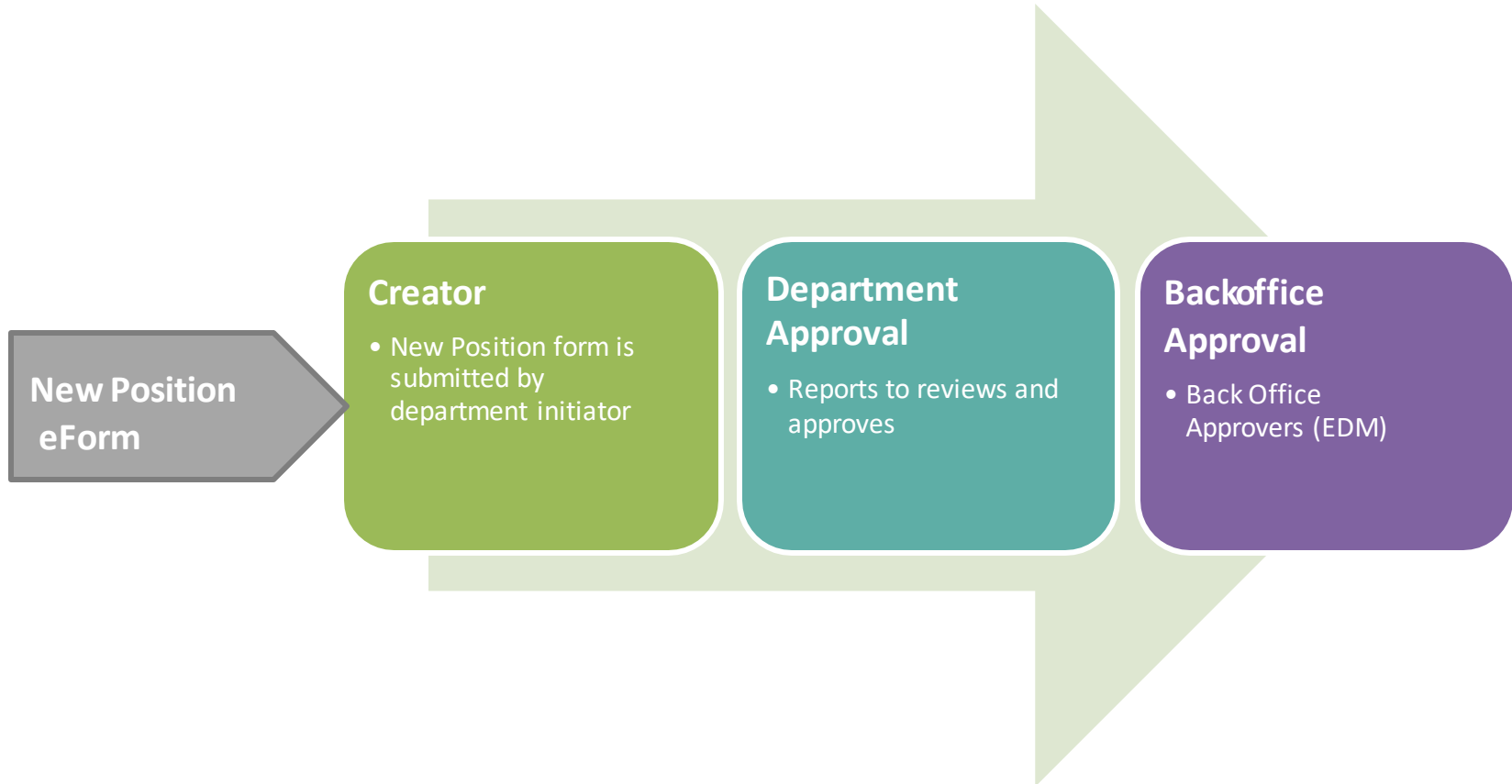
# Initiating a New Position eForm

The screenshot shows the top portion of the eForm. The 'Attachments' section contains a table with columns: Type, Note, Attached File, Attach Date/Time, and By. Below the table is an 'Add/Delete' button. The 'Comments' section has a text area and an 'Add/Edit' button. The 'Form Procedures' section includes a 'Contact Information' area with a 'Save' button (callout 10), a 'Submit' button (callout 12), and other buttons like 'Approve', 'Deny', 'CallBack', and 'Sendback'. A red arrow (callout 11) points from the 'Add/Delete' button to the 'Add/Edit' button.

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.

The screenshot shows the bottom portion of the eForm. The 'Department Approvals' section is titled 'REQUEST\_ID=00107872:Pending' and shows a 'Pending' status with 'Multiple Approvers' and 'New Position Reports To'. The 'Business Office Approvals' section is titled 'REQUEST\_ID=00107872:Awaiting Further Approvals' and shows a 'Not Routed' status with 'Multiple Approvers' and 'EDM'. A red callout 13 points to the 'Pending' status in the Department Approvals section.

# New Position Workflow



# 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

The screenshot shows the 'Employee Self Service' eForm interface. On the left, a navigation menu includes 'View Existing Requests', 'Create New Request' (highlighted with a red box and a circled '2'), 'Budget Overview', and 'Reports'. The main area displays 'My Requests' with a table containing one entry: '1 URL'. A callout box on the right contains the following instructions:

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.

The 'Initiate New eForms Request' page shows a table with columns for 'Action', 'Justification', 'Status', and 'Request Date'. The 'Actions' dropdown menu is open, listing various request types. The 'Position Attribute Change' option is highlighted with a red box and a circled '3'.

Request ID	eForms Action	Status	Name
1 URL			

Action	Justification	Status	Request Date
Additional Pay Request			Processing Messages
Affiliate Request			Request History
Appointment Request			
End Employee Assignment(s)			
Job Attribute Change			
New Position ID Requests			
Position Attribute Change			
Position Funding Change			
Retirement			
Transfer Request			

# Initiating a PAC eForm

## Position Attribute Change

**Action**

Actions Position Attribute Change Status

\*Justification Update Reports To 4

\*Position 10019144 5

\*Eff Date 02/01/2020 [calendar icon]

\*Reason Reports To Changes [dropdown arrow]

**Current and Future Incumbents**

Empl ID	Empl Rcd	Name
	0	

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).

Request ID

Request Date

Processing Messages

Request History

Show Current Additional Pay

Position Summary



# Initiating a PAC eForm

Current Position Information	Proposed Position Information
Position: 10019144 Profile ID: ELP10019144	Position: 10019144
Effective Date: 05/01/2019	Effective Date: 05/01/2019
Status: Active	Status: Active
Reason Code: Position Data Update	Reason Code: Position Data Update
Company: University of Texas, El Paso	Company: University of Texas, El Paso
Department: 203000 UT EL Paso	Department: 203000 UT EL Paso
Job Code: 16343 Guard I	Job Code: 16343 Guard I
Job Title: Guard I	Job Title: Guard I
Reg/Temp: Regular	Reg/Temp: Regular
Full/Part Time: Full-Time	Full/Part Time: Full-Time
FLSA Status: Nonexempt	FLSA Status: Nonexempt
Empl Class: Classified	Empl Class: Classified
Sal Plan: UTEP Classified	Sal Plan: UTEP Classified
Proposed Salary: [Grey Field]	Proposed Salary: [Grey Field]
Budgeted Amt: 20088.00	Budgeted Amt: 20088.00
Acadm Rnk: [Grey Field]	*FTE: 1.000000
FTE: 1.000000	Std Hrs/Wk: 40.00
Std Hrs/Wk: 40.00	Max Head Cnt: 1
Max Head Cnt: 1	Reports To Pos: 10021624
Reports To Pos: 10021624	Reports To Name: Florencio Ramirez
Reports To Name: Florencio Ramirez	Reports To Email: FRAMIREZ61@UTEP.EDU
Reports To Email: FRAMIREZ61@UTEP.EDU	Location Code: OTHR
Location Code: OTHR	Mail Drop ID: 00631
Mail Drop ID: 00631	<input type="checkbox"/> Key Position <input checked="" type="checkbox"/> Budgeted Position <input type="checkbox"/> Permanently Budgeted
Officer Code: Not Applicable	
<input type="checkbox"/> Key Position <input checked="" type="checkbox"/> Budgeted Position <input type="checkbox"/> 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

The screenshot shows the PAC eForm interface. The **Attachments** section has a table with columns: Type, Note, Attached File, Attach Date/Time, and By. Below the table is an **Add/Delete** button. The **Comments** section has an **Add/Edit** button. The **Form Procedures** section has buttons for **Save**, **Submit**, **Approve**, **Deny**, **CallBack**, and **Sendback**. A red arrow points from the **Add/Delete** button to the **Add/Edit** button, with a circled '7' in the middle. A circled '6' is next to the **Save** button, and a circled '8' is next to the **Submit** button.

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."

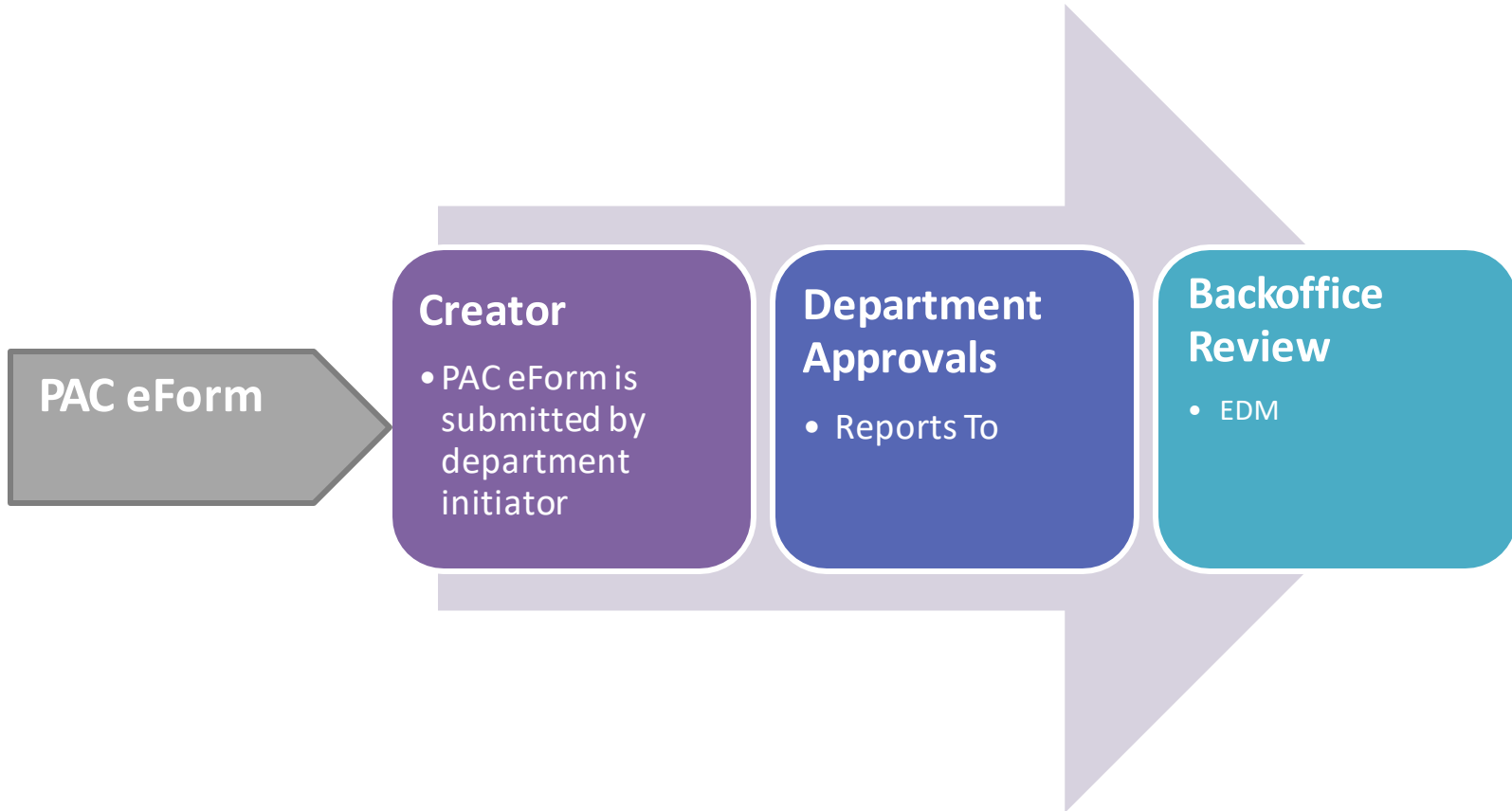
7. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

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.

The screenshot shows the **Department Approvals** and **Business Office Approvals** sections. The **Department Approvals** section shows a **REQUEST\_ID=00107876:Pending** status with a **Pending** status for **Florencio Ramirez** with **New Position Reports To**. A circled '9' is next to this section. The **Business Office Approvals** section shows a **REQUEST\_ID=00107876:Awaiting Further Approvals** status with a **Not Routed** status for **Multiple Approvers** with **EDM**.

# PAC Workflow



# 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

**Employee Self Service** eForm

View Existing Requests  
**Create New Request** 2  
 Budget Overview  
 Reports

**My Requests** Personalize | Find | View All | First ◀ Prev 1 of 1 Next ▶ Last

Request ID	eForms Action	Status	Name
1 URL			

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.

**Initiate New eForms Request**

**Action**

Actions  Status

Justification

- Additional Pay Request
- Affiliate Request
- Appointment Request** 3
- End Employee Assignment(s)

▼ **Contact Information**

Entered By

Name

Phone

Email ID

Dept ID

Secondary Company

Job Attribute Change

New Position ID Requests

Position Attribute Change

Position Funding Change

Retirement

Transfer Request

Request ID

Request Date

Processing Messages

Request History

# Initiating an Appointment eForm

**Appointment Request**

**Action**

Actions  Status 4

\*Justification  5

Request ID  
Request Date  
Processing Messages  
Request History

**Employee Information**

\*Empl ID   Show Current Additional Pa

Empl RCD	Job Indicator	Company	HR Status	Payroll Status
1	0 Primary	ELP	Inactive	Terminated

Dept ID Dept  
ons/Other 710400 Teac

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
Std 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		
Acadm Rnk		
FTE	0.475000	
Std 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

**Current Funding** Find First 1 of 1 Last

Start Date 09/01/2019

Distribution Chartfields Project Info

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

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

**Proposed Funding** Find First 1 of 1 Last

\*\*Start 02/01/2020

Date

Distribution Chartfields Project Info

Em 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

The screenshot shows the top portion of the Appointment eForm. It includes sections for Attachments, Comments, and Form Procedures. A red box labeled '7' highlights the 'Add/Delete' button in the Attachments section. A red arrow labeled '8' points from the 'Add/Edit' button in the Comments section to the 'Add/Delete' button. Another red box labeled '9' highlights the 'Submit' button in the Form Procedures section.

7. 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."

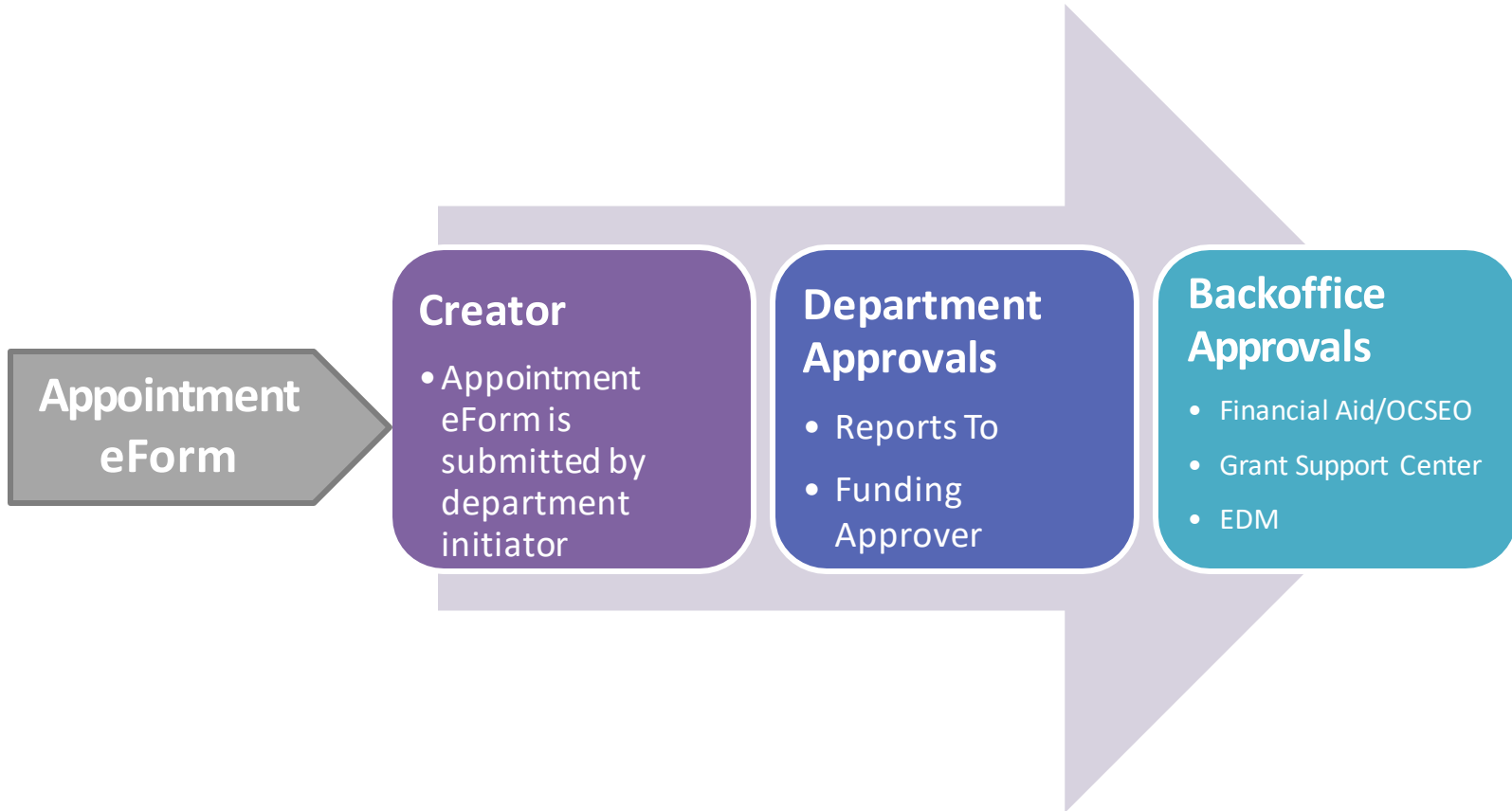
8. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

9. Click the **Submit** button.

10. 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.

The screenshot shows the bottom portion of the Appointment eForm, displaying approval sections. A red box labeled '10' highlights the 'Department Approvals' section, which shows a 'Pending' status for the request. Below it are 'Funding Approvals' and 'Business Office Approvals', both showing 'Not Routed' statuses.

# Appointment Workflow



# 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

Employee Self Service eForm

View Existing Requests  
**Create New Request**  
Budget Overview  
Reports

My Requests Personalize | Find | View All | First | Prev 1 of 1 Next | Last

Request ID	eForms Action	Status	Name
1 URL			

- 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.

Initiate New eForms Request

Action

Actions	Status
Justification	
Additional Pay Request	
Affiliate Request	
Appointment Request	
End Employee Assignment(s)	
<b>Job Attribute Change</b>	
New Position ID Requests	
Position Attribute Change	
Position Funding Change	
Retirement	SVCS
Transfer Request	

Contact Information

Entered By

Name

Phone

Email ID

Dept ID

Secondary Co

Request Date

Processing Messages

Request History

# Initiating a JAC eForm

**Job Attribute Change**

**Action**

Actions: Job Attribute Change (dropdown) Status (dropdown) 4

\*Justification: Pay increase

Request ID  
Request Date  
Processing Messages  
Request History

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**Employee Information** 5

\*Empl ID: 6001009472 Cruncleton, Isela D

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action
1 <input checked="" type="checkbox"/>		0 Primary	ELP	Active	Active	11/01/2019	Position Change

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

Job Change Information		Position Summary	
*Effective Date	02/01/2020		
*Reason	Pay Rate Changes		
*Change Reason	Out-of-Cycle Merit		
Current Job Information		Proposed Job Information	
Empl Class	Classified	Empl Class	Classified
Comp Frqncy	Monthly	Comp Frqncy	Monthly
FTE	1.000000	FTE	1.000000
Annual Rate @100%	66934.000	*Annual Rate @100%	70000.000
Annual Rate @FTE	66934.000	Annual Rate @ FTE	70000.000
Monthly Rate	5577.833	Monthly Rate	5833.333
Expected Job End Date	<input type="text"/> <input type="checkbox"/> Auto End Job	Expected Job End Date	<input type="text"/> <input type="checkbox"/> Auto End Job

- 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 JAC Request eForm

**Current Funding** Find First 1 of 1 Last

Start Date 09/01/2019

Distribution Chartfields Project Info

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

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

**Proposed Funding** Find First 1 of 1 Last

\*\*Start 02/01/2020

Date

Distribution Chartfields Project Info

Em 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

**Attachments**

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

**Comments**

Find First 1 of 1 Last

Add/Edit

Comment By DateTime

**Form Procedures**

**6** Contact Information **8**

Save Submit Approve Deny CallBack Sendback

- 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."
- Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
- Click the **Submit** button.
- 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=00107877:Pending

Dept Approvals

Pending

Brandon L Jones  
New Position Reports To

**9**

**Funding Approvals**

REQUEST\_ID=00107877:Awaiting Further Approvals

Funding Source

Not Routed

Multiple Approvers  
FMS Cost Center Approver

**Business Office Approvals**

REQUEST\_ID=00107877:Awaiting Further Approvals

JAC

Not Routed

Sarah Christine Garcia  
Recruitment

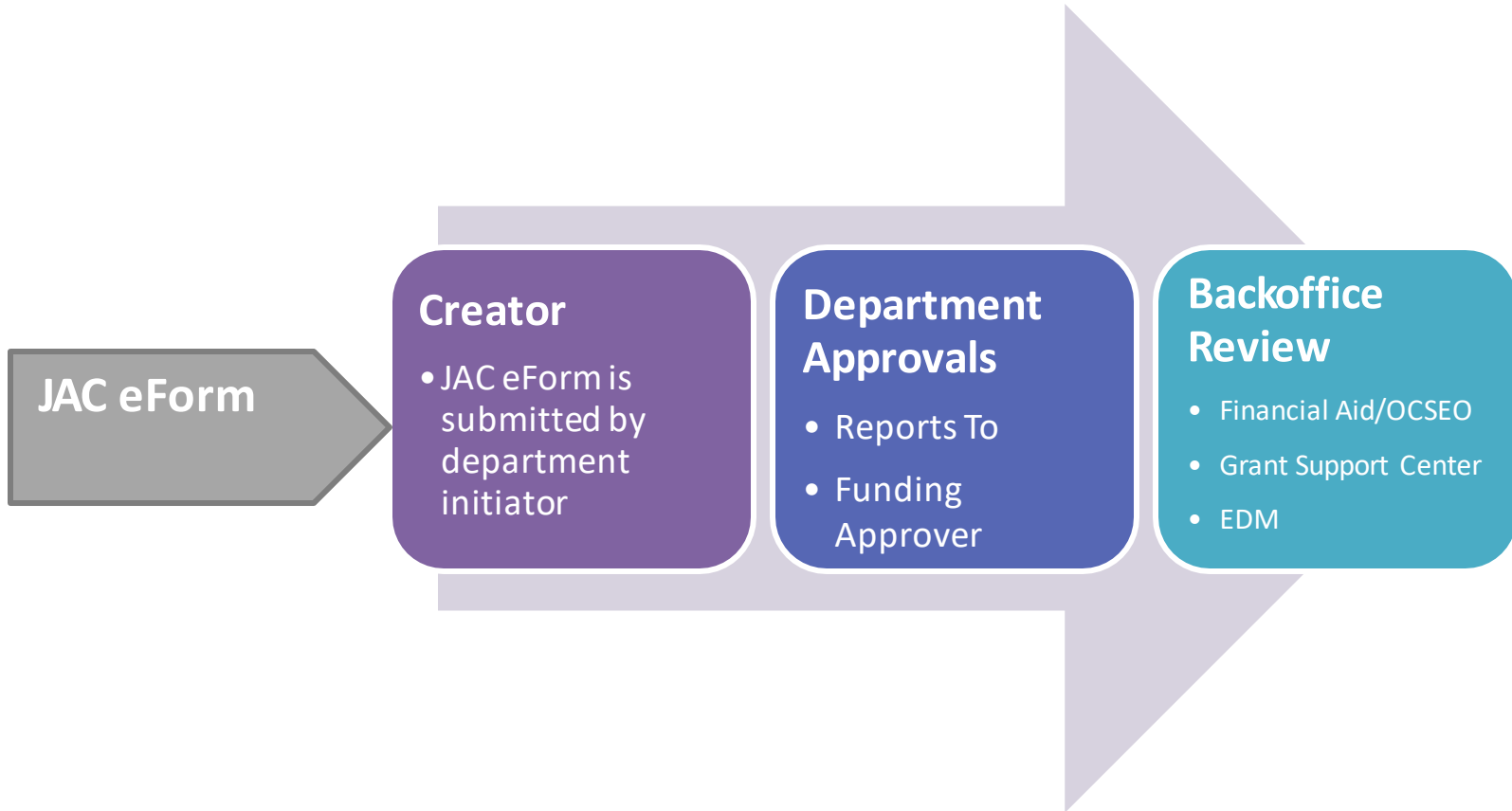
→

Not Routed

Multiple Approvers  
EDM



# JAC Workflow



# 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

**Employee Self Service** eForm

View Existing Requests  
**Create New Request** (2)  
 Budget Overview  
 Reports

**My Requests** Personalize | Find | View All | [Icons] First Prev 1 of 1 Next Last

Request ID	eForms Action	Status	Name
1	URL		

**Initiate New eForms Request**

**Action**

Actions [Dropdown] Status

Justification

Request Date  
 Processing Messages  
 Request History

▼ **Contact Information**

Entered By

Name  
 Phone  
 Email ID  
 Dept ID

Secondary Contact

Additional Pay Request  
 Affiliate Request  
 Appointment Request  
 End Employee Assignment(s)  
 Job Attribute Change  
 New Position ID Requests  
 Position Attribute Change  
 Position Funding Change  
 Retirement  
**Transfer Request** (3)

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 Transfer eForm

**Transfer Within Institution**

**Action**

Actions:  Status:

\*Justification:  4

Request ID  
Request Date  
Processing Messages  
Request History

**Employee Information** 5

\*Empl ID:  Serrano, Cynthia Marie  [Show Current Additional Pay](#)

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1 <input checked="" type="checkbox"/>		0 Primary	ELP	Active	Active	09/01/2019	Pay Rate Change	Permanent Additional Duties	301100

\*Transfer Date:

Position:

Expected End:

Transfer Action:

Transfer Action Reason:

**Current and Future Incumbents**

Empl ID	Empl Rcd	Name
	0	

- The **Transfer** eForm is displayed. Use the **Justification** text box to explain or “justify” the reason for the eForm action requested.
- 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.

# Initiating a Transfer eForm

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

## Proposed Job Information

Empl Class

Comp Frqncy

FTE  Std Hrs/Wk

\*Annual Rate @100%

Annual Rate @FTE

Proposed Annualized Rate

Monthly Rate @FTE

- 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.

## Current Funding

Find First 1 of 1 Last

Start Date 09/01/2019

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

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	<input type="text" value="14021300"/>	<input type="text" value="BUDGET OFFICE"/>	<input type="text"/>		<input type="text" value=""/>	<input type="text" value="100.000"/>	<input type="button" value="+"/> <input type="button" value="-"/>
CDA	19021300	Budget Office Ope Expenses				100.000	<input type="button" value="+"/>

# Initiating a Transfer eForm

**Attachments**

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

**Comments**

Find First 1 of 1 La

Add/Edit

Comment By DateTime

**Form Procedures**

**Contact Information**

6 Save 8 Submit Approve Deny CallBack Sendback

- 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."
- Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
- Click the **Submit** button.
- 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=00107877:Pending

Dept Approvals

Pending  
Brandon L Jones  
New Position Reports To

**Funding Approvals**

REQUEST\_ID=00107877:Awaiting Further Approvals

Funding Source

Not Routed  
Multiple Approvers  
FMS Cost Center Approver

**Business Office Approvals**

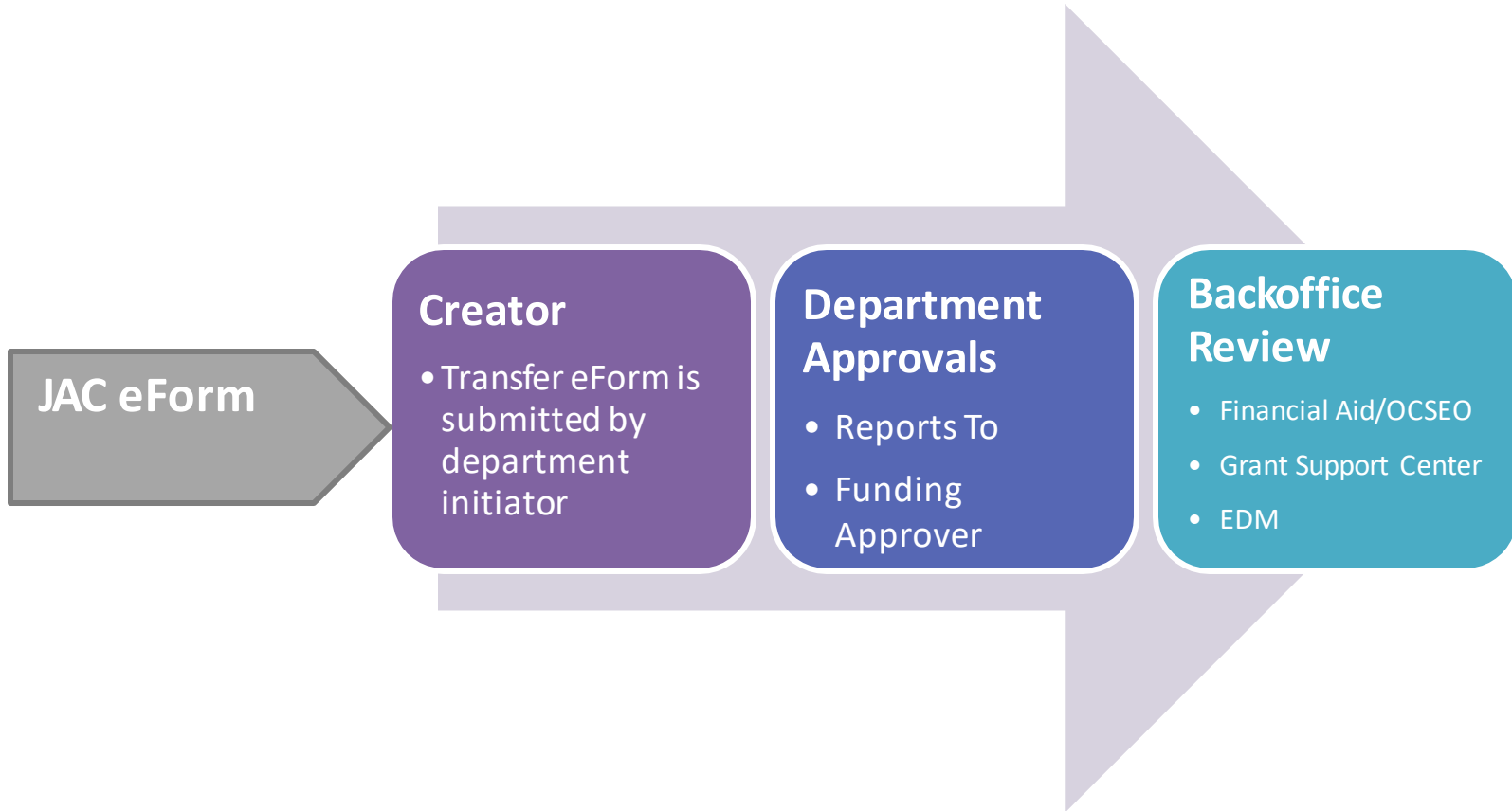
REQUEST\_ID=00107877:Awaiting Further Approvals

JAC

Not Routed Sarah Christine Garcia Recruitment → Not Routed Multiple Approvers EDM

9

# Transfer Workflow





# eForm Warning Messages

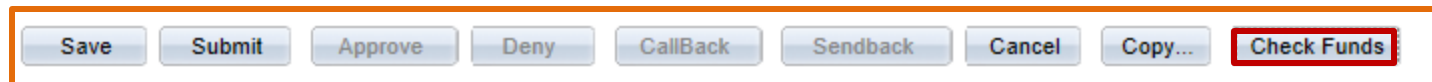
- **General Warning-** Warning message on duplicate request for a Position #/Empl ID.
- **Hard Stop-** Error message for missing required fields and/or attachments, or date errors.

# 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 EGDLO3    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
	<b>Totals</b>		<b>718,268.67</b>	<b>0.00</b>	<b>-586,059.11</b>	<b>216,580.72</b>	<b>0.00</b>	<b>-84,371.16</b>	<b>30,416.67</b>	<b>0.00</b>	<b>30,416.67</b>	<b>-114,787.83</b>

## 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

Action	
Actions	Position Funding Change ▼ <b>Status</b> Pending Approvals
*Justification	Funding change required for student appointment.
	Request ID 00118640 Request Date 02/26/2020 <a href="#">Processing Messages</a> <a href="#">Request History</a>

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

- Create New Request
- My Pending Approvals
- Budget Overview
- Reports

**My Requests** Personalize | Find | View All | First Prev 1 of 1 Next Last

Request ID	eForms Action	Status	Name
1 00118640	Funding Change	Pending Approvals	

Find an Existing Value Add Value Prev 1 of 1 Next Last

**Search Criteria**

Request ID begins with 00118640

eForms Actions =

Status =

Empl ID begins with

First Name begins with

Last Name begins with

Dept ID begins with

Dept Description begins with

Position Number begins with

Job Code begins with

Job Title begins with

Job Action begins with

Action Reason begins with

Request Date =

Other Effective Date =

Assigned Operator ID begins with

**My Pending Approvals**

Company begins with

Business Unit begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

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:

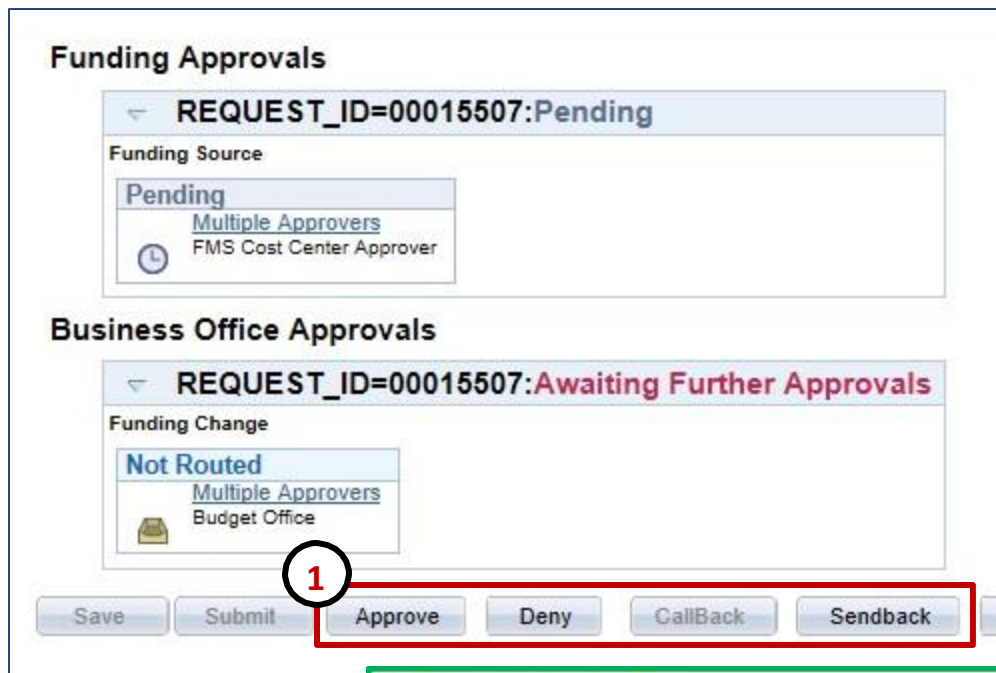
- Log into PeopleSoft, from the Employee Self Service homepage select the **eForms Tile**.
- Under **My Pending Approvals**, select the document to review/approve.

The screenshot shows the 'Employee Self Service' navigation bar and the 'eForms Portal Pagelet'. A red box highlights the 'My Pending Approvals' link in the left sidebar. A second red box highlights the 'My Pending Approvals' section header in the main content area. Below this, a table lists the pending approvals. A hand cursor is pointing at the first row of the table.

Request ID	eForms Action	Status	Name
1 00015881	Position Funding Change	Pending Approvals	



# Approving eForms



**Funding Approvals**

REQUEST\_ID=00015507:Pending

Funding Source

Pending

Multiple Approvers  
FMS Cost Center Approver

**Business Office Approvals**

REQUEST\_ID=00015507:Awaiting Further Approvals

Funding Change

Not Routed

Multiple Approvers  
Budget Office

1

Save Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds

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
- **Position 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](mailto:EDMQA@UTEP.EDU)

# Questions



# Thank You

