UT SHARE

eForms
(Phase I)

PEOPLESOFT

THE UNIVERSITY OF TEXAS AT EL PASO

Agenda

- eForms Overview
- Phase I eForms:
  - End Employee Assignment(s) Form
  - Retirement Form
  - Position Funding Change Form
    - Check Funds
- Approving eForms
- eForm Tips
- eForms Phase II

eForms Overview

What are eForms?

- Similar to IAPs, eForms allows us to electronically route documents for approval.

What's different from IAPs?

- eForms streamline the entire process for completing and approving transactions.
- Forms enable electronic approval routing, capture and update data directly in PeopleSoft, and provides audits and reporting capabilities.

eForms Overview

How does it work?

Initiator Submits eForm → Department Approval → Back Office Review → Update PeopleSoft

eForms Overview

Who will use 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, Employee 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 have access to:
  - Search for their pending and completed documents
  - Recall documents pending approval
  - Cancel documents not submitted
- Approvers will receive emails regarding pending documents and they can approve using the worklist.

Phase I eForms:

Current IAP	Transition	eForm Name	eForm Action
HR Separation/Retirement IAP Form*	→	End Employee Assignment(s)	Ends an employment record for an employee with one or multiple appointments.
	→	Retirement	Ends all employment records for employees retiring from the university.
Position Funding Changes IAP*	→	Position Funding Change	Updates the funding source for a position.

***Important: Effective December 3, 2018, the Separations/Retirement IAP Form & Position Funding Changes IAP will be removed from peoplesoft.utep.edu and the respective eForm will need to be submitted. All other IAP forms will remain active.**

End Employee Assignment(s) eForm

When to use

- When an employee should no longer be employed by your department. Ex: employee resignation, transferring to another department, student is graduating, etc…

When not to use

- Involuntary separations should be processed by Human Resources. Please work with your Employee Relations (ER) representative.

Access

- System allows you to see all active assignments for the employee.
- System only allows you to end the assignment associated to your departmental access group.

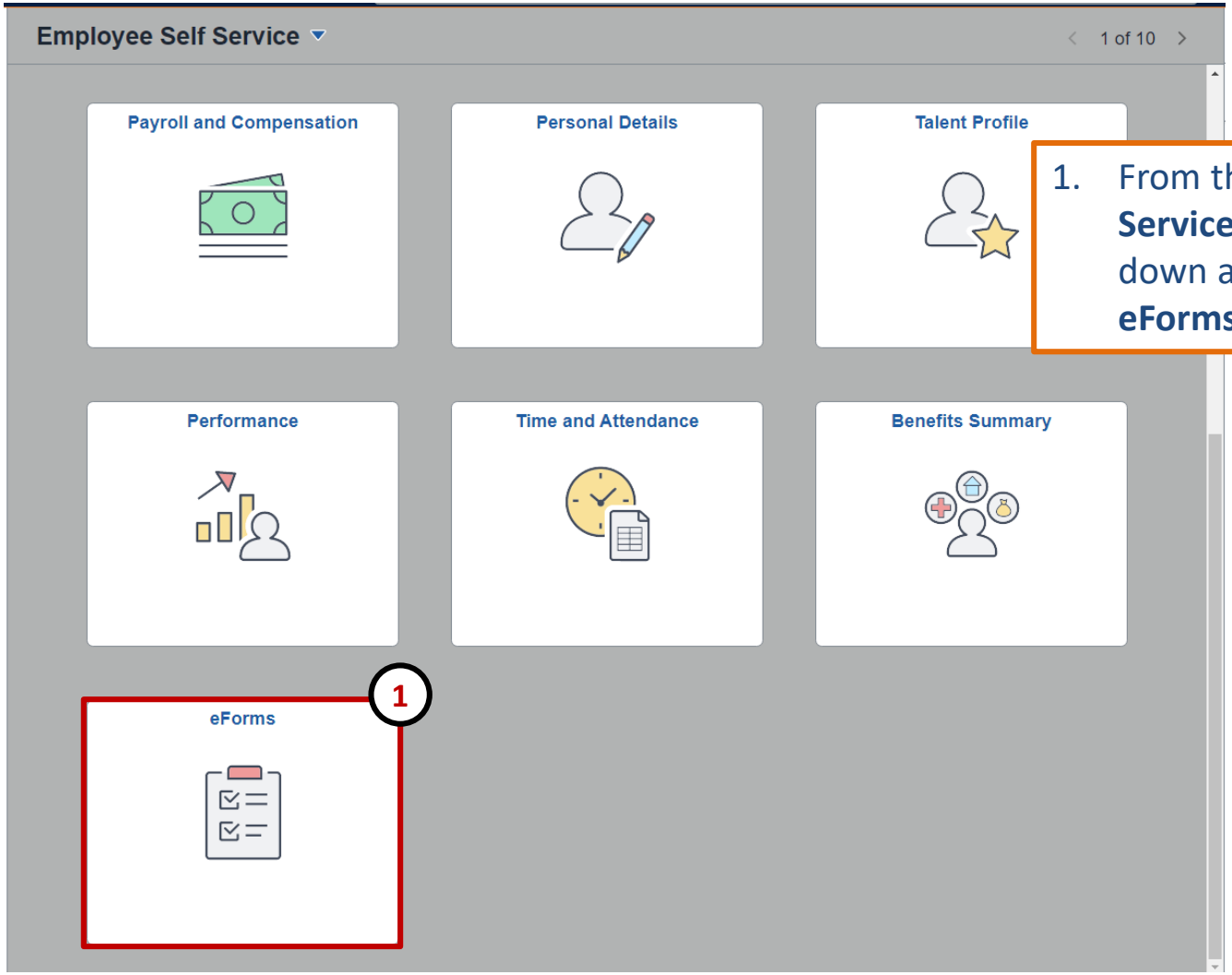
Timesheets

- If applicable, all time (sick, vacation, paid hours) must be entered before processing this form.

End Employee Assignment(s) Warning Messages

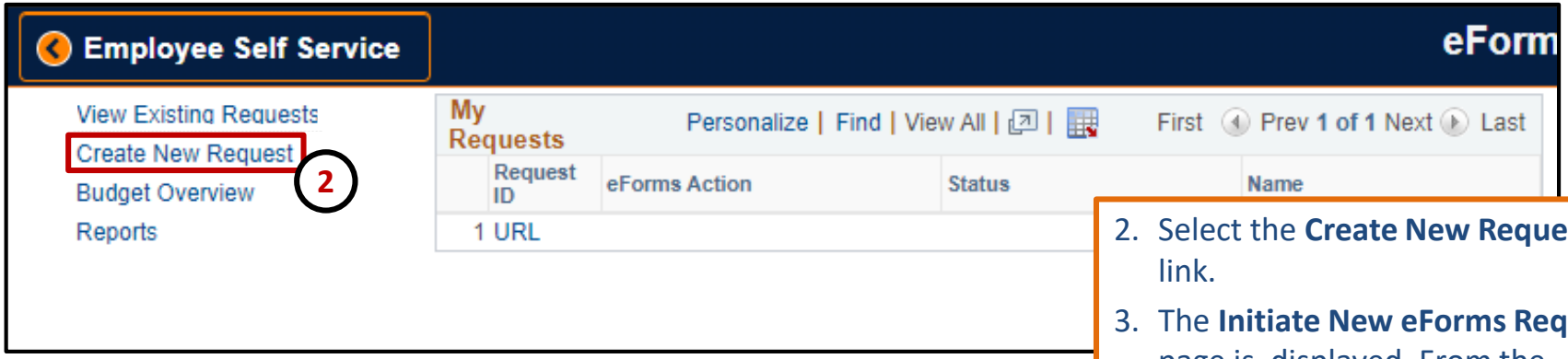
- **General Warning-** Warning message on duplicate request for a Position #/Empl ID.
- **Ending Primary Record-** This primarily impacts employees with multiple job records. You can proceed with submission and the Back Office will review to take the necessary steps.
- **Hard Stop-** Error message for missing required fields and/or attachments, date errors.
- Please attach the letter of resignation to the eform.

Initiating an End Employee Assignment(s) eForm

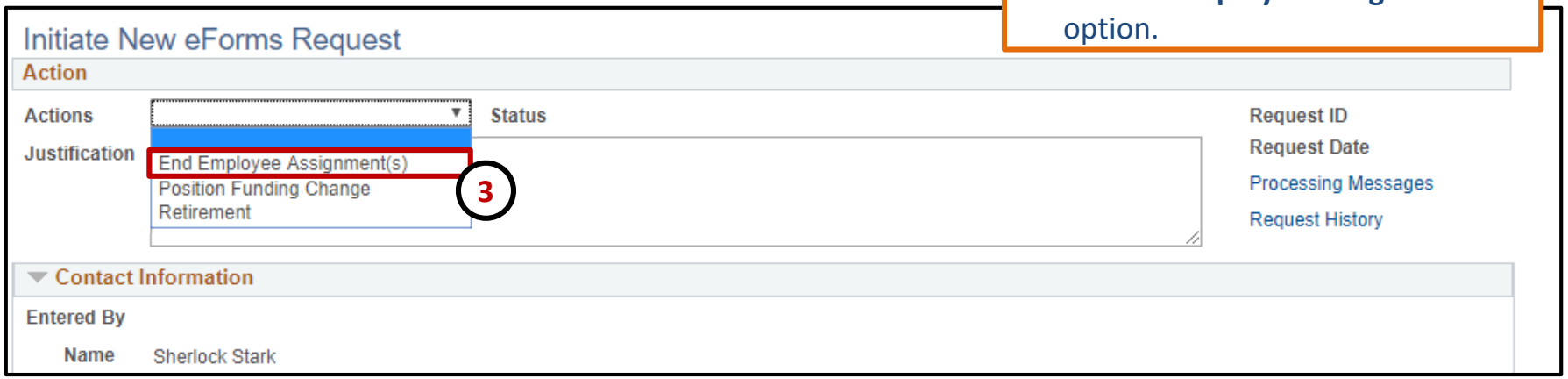


1. From the **Employee Self Service** homepage, scroll down and click on the **eForms Tile**.

Initiating an End Employee Assignment(s) 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 **End Employee Assignment** option.



Initiating an End Employee Assignment(s) eForm

End Employee Assignment(s)

Action

Actions: End Employee Assignment(s) | Status

*Justification: Ending appointment as of 11/30/2018 (3)

Request ID
Request Date
Processing Messages
Request History

Employee Information (4)

*Empl ID: 6001010000 Lieber, Stanley M

	Select	Empl RCD	Last Day Worked	Job Indicator	Compan		Reason
1	☐	0		Primary	ELP	ge	Correction-Pay Rate
2	☐ (5)	1		Secondary	ELP	ge	Pay Group Change
3	☑	2	11/30/2018 (6)	Secondary	ELP		Rehire - Same Institution

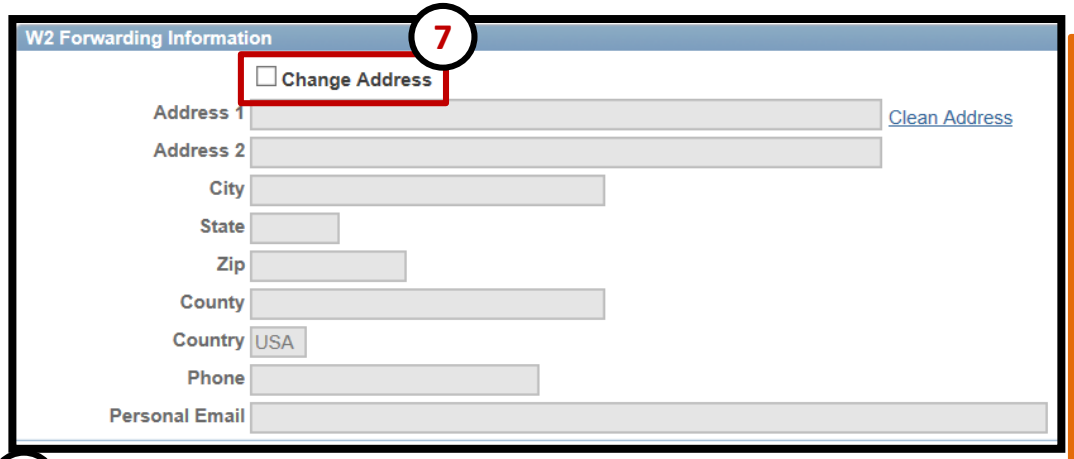
3. The **End Employee Assignment** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
4. From the **Employee Information** section, enter or look up the employee's ID in the **Empl ID** field.

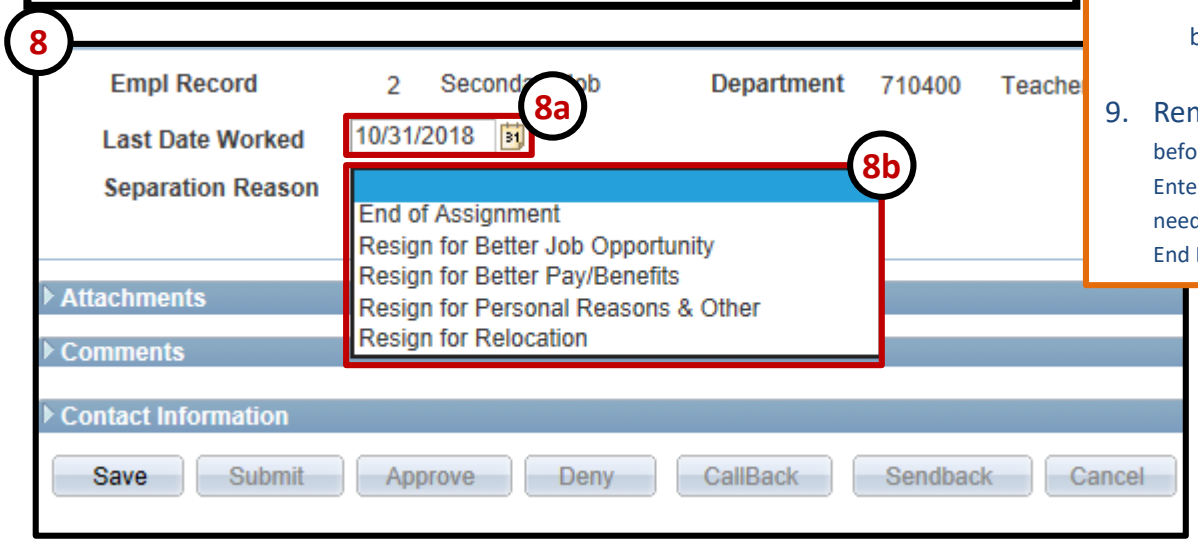
   Note: All active employee records for the employee will display but you will only have the option to select records for the department(s) you have access to; this is dependent on your security access.

5. Select the appropriate **Empl Record.**
6. Once the Empl Record(s) has been selected, enter the **Last Day Worked.**

   Note: The Last Date Worked should be the last day the employee actually worked or the last date that time was entered for the employee.

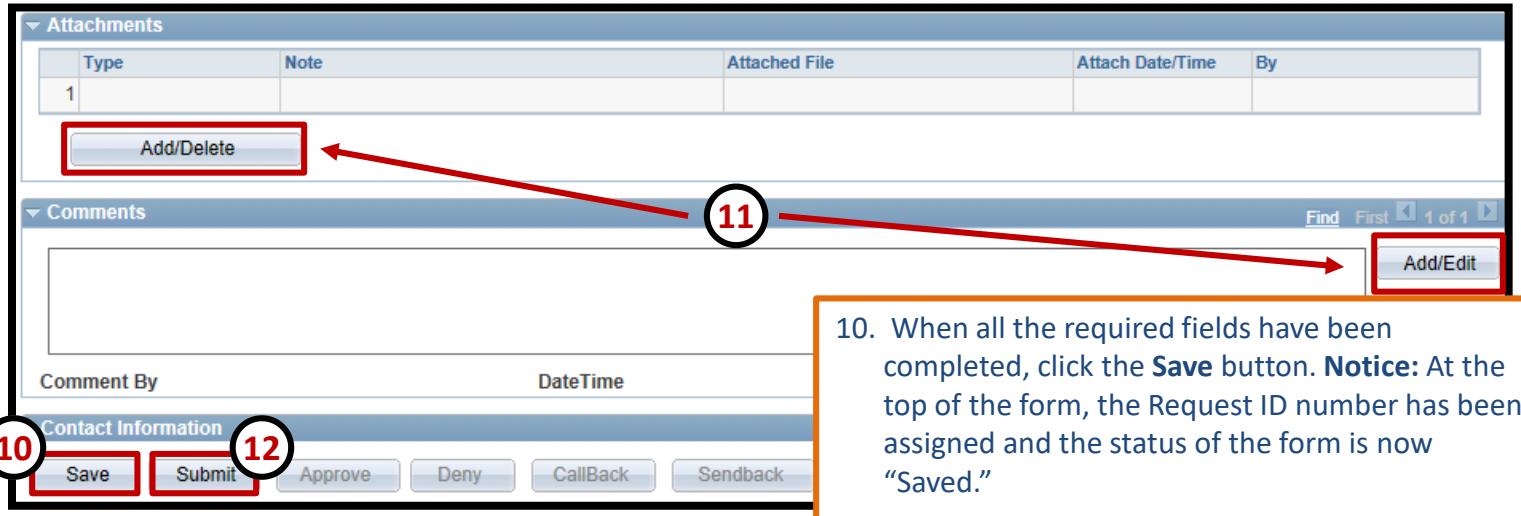
Initiating an End Employee Assignment(s) eForm





7. The **W2 Forwarding Information** section displays the employee's current mailing address. Select the **Change Address** checkbox if the employee has provided a different mailing address to use for their W2.
   - **Note:** Use the **Clean Address** link if updating the address, to ensure a valid postal address is entered.
8. The **Appointment Detail** section is used to capture details for the end of appointment:
   a) Verify the **Last Date Worked** matches the date entered above.
   b) From the drop down, select the corresponding **Separation Reason**.
9. Reminder: All time (sick, vacation, paid hours) must be entered before the completion of this form, check the "All Time and Leave Entered" box if you have entered the time. Otherwise, you will need to save the form, enter the time, and return to complete the End Employee Assignment(s) form.

Initiating an End Employee Assignment(s) eForm

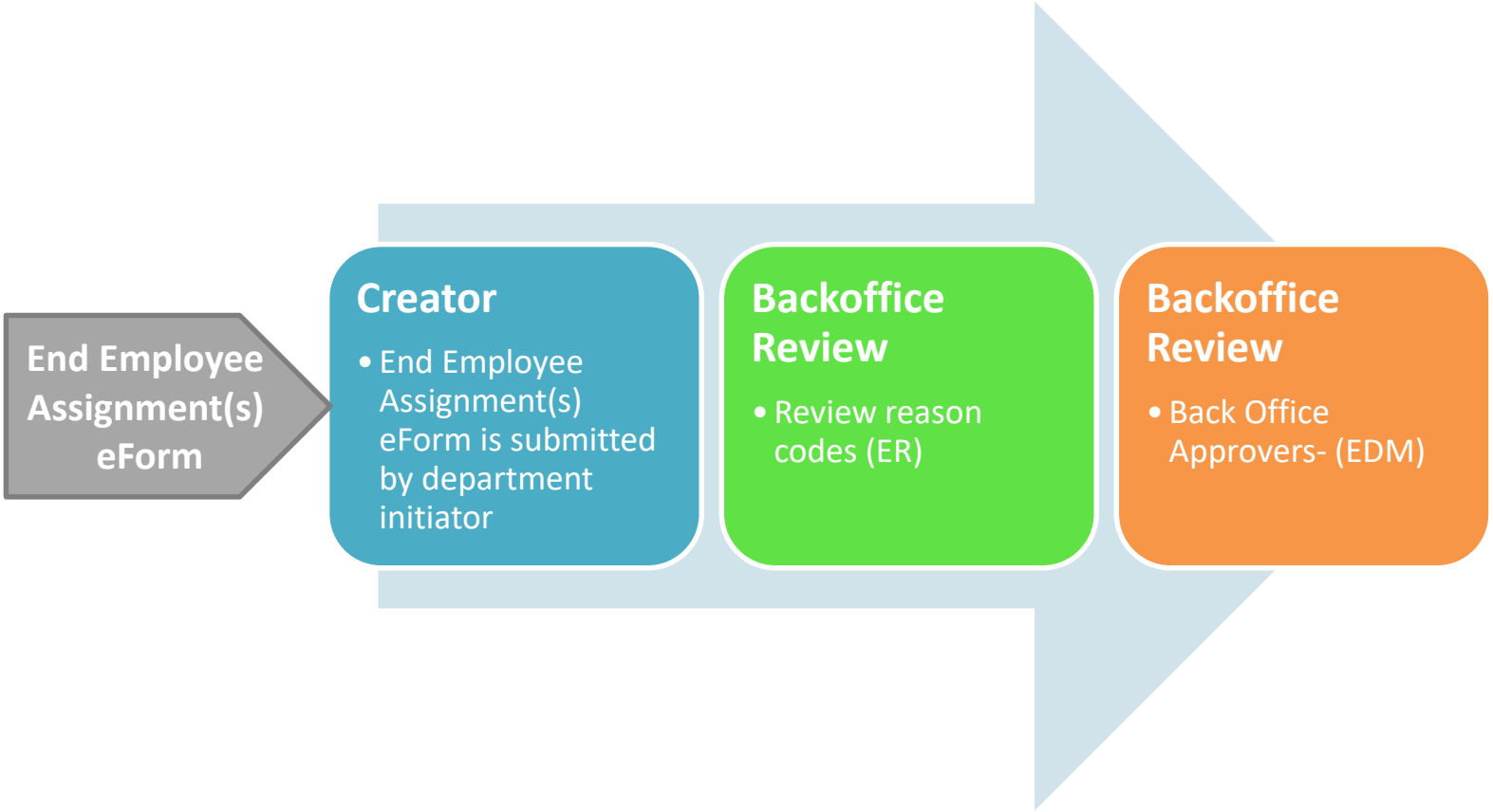


10. When all the required fields have been completed, click the **Save** button. **Notice:** At the top of the form, the Request ID number has been assigned and the status of the form is now "Saved."
11. Expand the **Attachments** or **Comments** section to attach required documentation and include any 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.

Separation Reasons

Separation Reason	Completed by	When to use?
End of Assignment	Department	Used when student's assignment has ended (e.g. graduated or ineligible), faculty appointed semester by semester only, funds for grant have ended- verify with ORSP to confirm funding.
Resign for Better Job Opportunity	Department	Employee is resigning due to other job opportunity (attach resignation letter)
Resign for Better Pay/ Benefits	Department	Employee is resigning due to better pay/benefits opportunity (attach resignation letter)
Resign for Personal Reasons & Other	Department	Employee is resigning due to personal reasons (attach resignation letter)
Resign for Relocation	Department	Employee is resigning due to relocation (attach resignation letter)

End Employee Assignment(s) Workflow



Retirement eForm

When to use

- Employees retiring from the university.
- This form will retire **ALL** active employee records.

Access

- System allows you to see all active assignments for the employee.
- System allows you to end **ALL** assignments associated with the employee.

Timesheets

- All time (sick, vacation, paid hours) must be entered before processing this eForm.

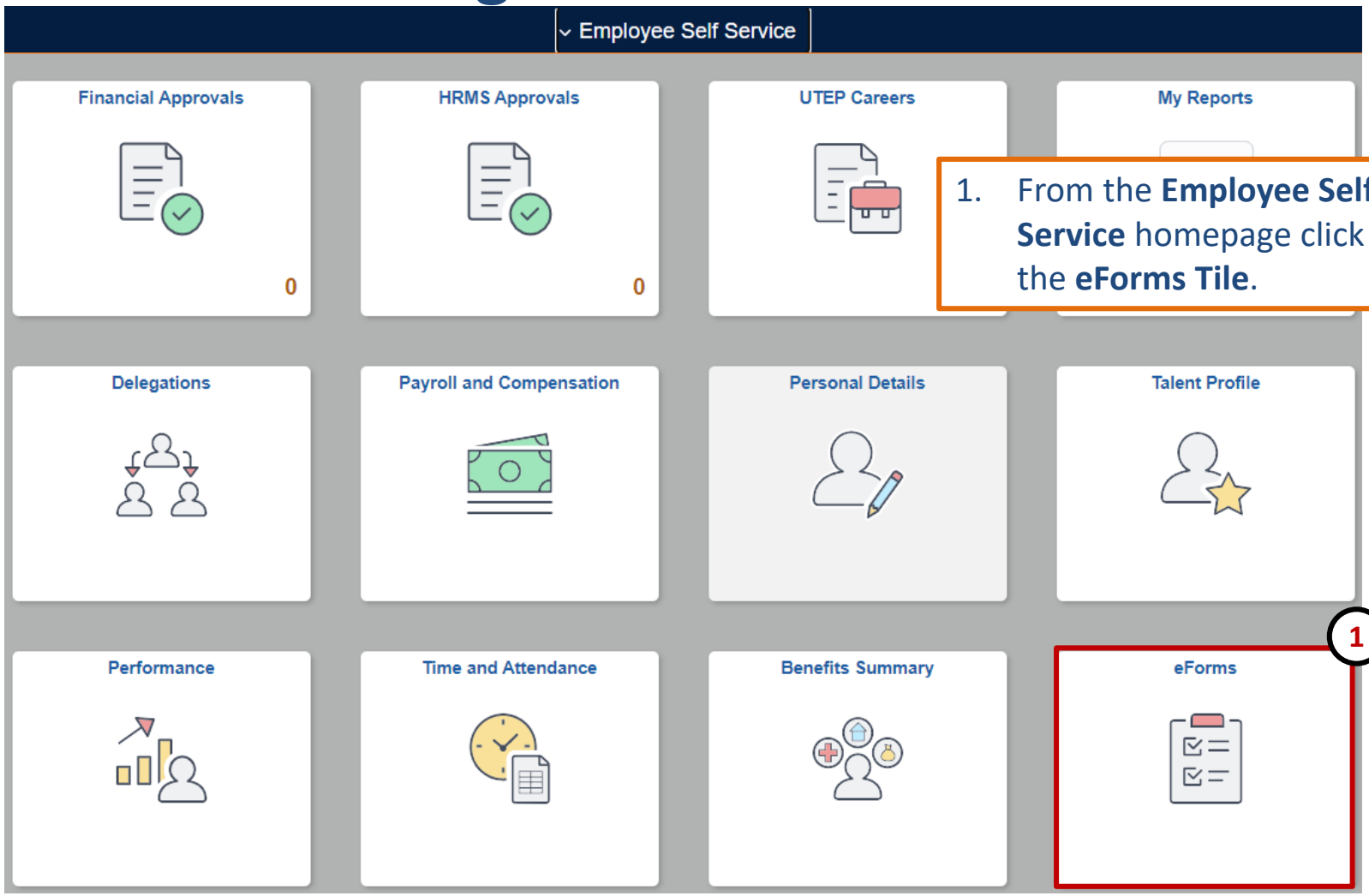
Attachments

- Required: Retirement Letter

Retirement eForm Warning Messages

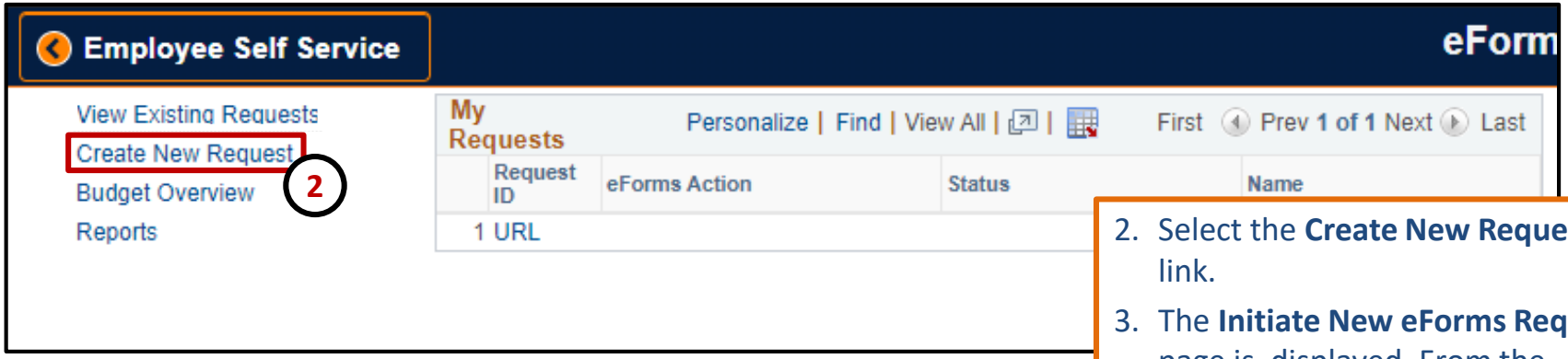
- **General Warning-** Warning message on duplicate request for a Position #/Empl ID.
- **Hard Stop-** Error message for missing required fields and/or attachments, date errors.

Initiating a Retirement eForm

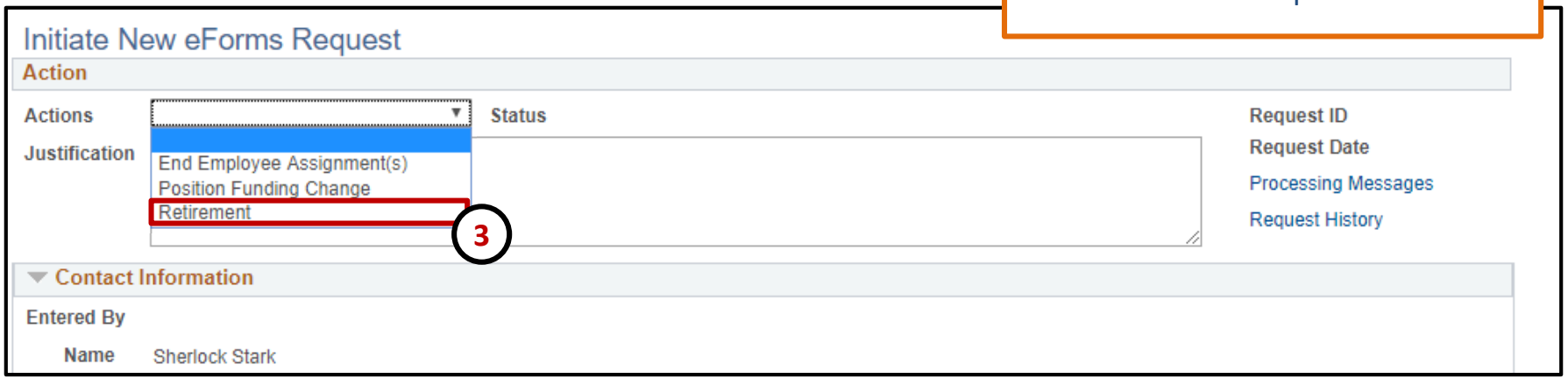


1. From the **Employee Self Service** homepage click on the **eForms Tile**.

Initiating a Retirement 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 **Retirement** option.



Initiating a Retirement eForm

Retirement

Action

Actions: Retirement Status

*Justification: Employee will be retiring on 11/30/2018 (4)

Request ID
Request Date
Processing Messages
Request History

Employee Information (5)

*Empl ID 6001111111 Rogers, Steve

	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID	Dept Name
1	1	Primary	ELP	Active	Active	09/01/2			602001	Extended Universit
2	0	Secondary	ELP	Active	Active	09/01/2			741200	English

Termination Information (6)

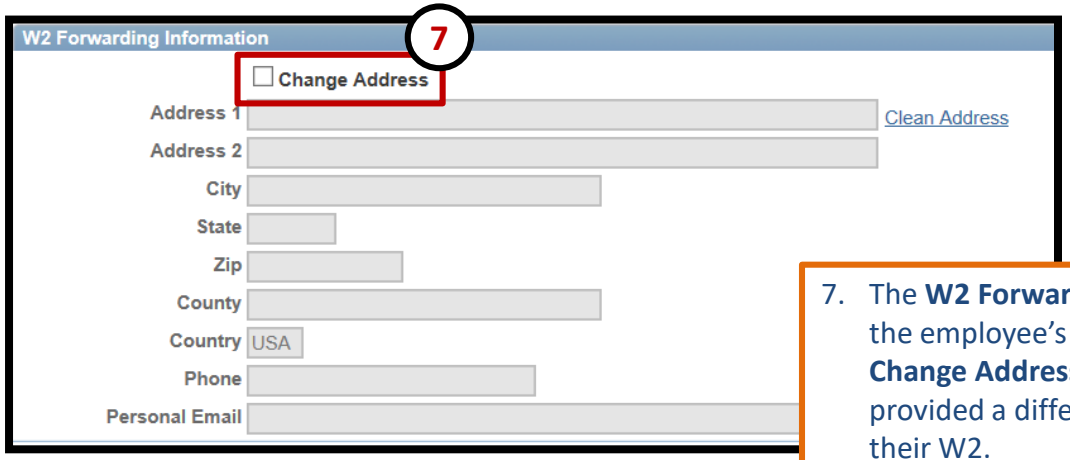
*Last Date Worked

(7) All Time and Leave Entered

4. The **Retirement** 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: All active employee records for the employee will display.
6. Under the **Termination Information** section enter the **Last Date Worked**.
   Note: Last date work is the last day the employee actually worked or the last date time was entered for the employee.

7. Reminder: All time (sick, vacation, paid hours) must be entered before the completion of this form, check the "All Time and Leave Entered" box if you have entered the time. Otherwise, you will need to save the form, enter the time, and return to complete the Retirement form.

Initiating a Retirement eForm



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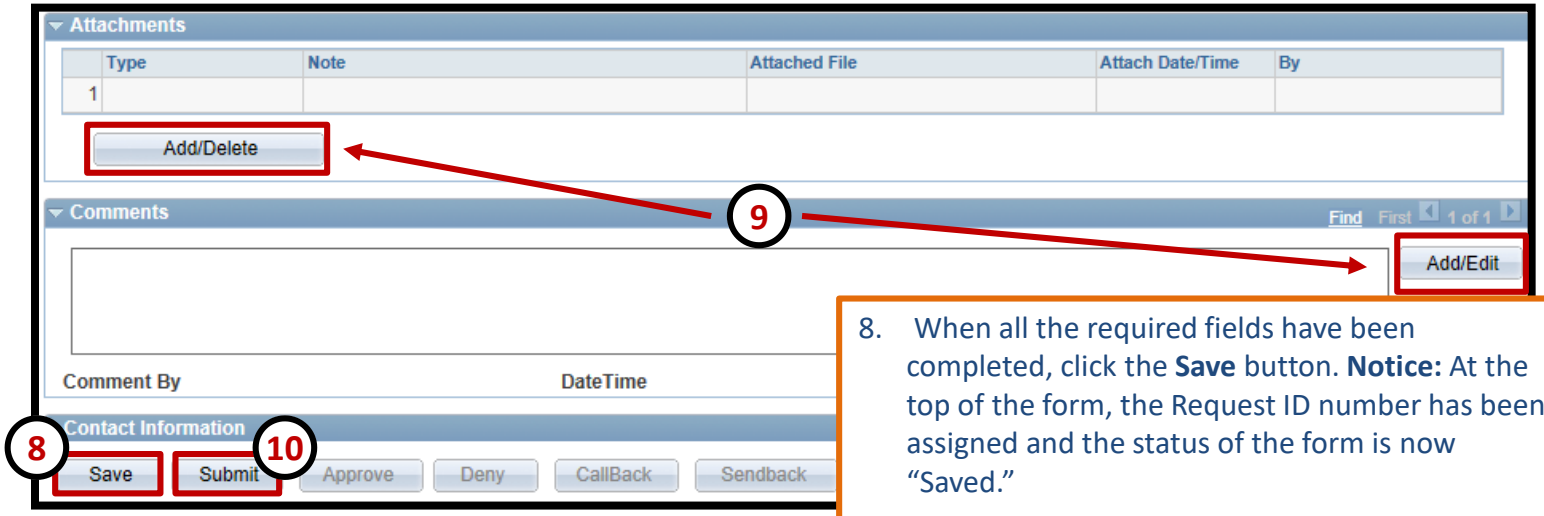
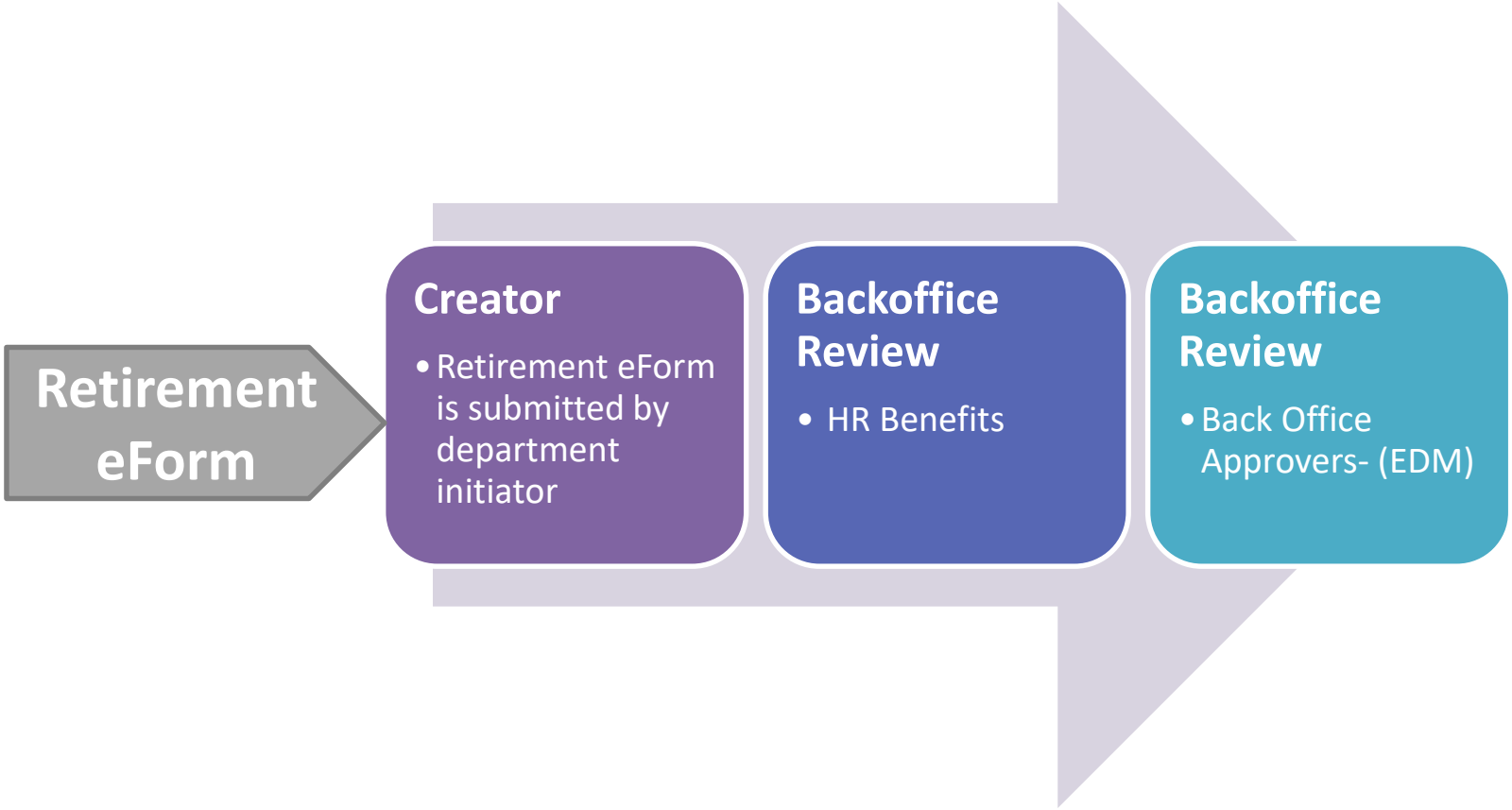
   - **Note:** Use the **Clean Address** link if updating the address, to ensure a valid postal address is entered.

Initiating a Retirement eForm



8. 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."
9. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
10. Click the **Submit** button.
11. 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.

Retirement Workflow



Position Funding Change eForm

When to use

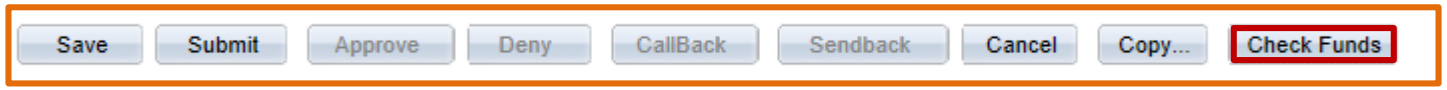
- To update the funding for a position

Access

- System only allows you to submit funding changes for positions associated to your departmental access group.
- The funding may be split between multiple funding sources and will route to the appropriate budget authority for review and approval

Budget Checking

- There is a new button called **Check Funds**, any eForm that has the ability to add or update funding, will have the "Check Funds" button at the bottom.
- "Check Funds" allows 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

- **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

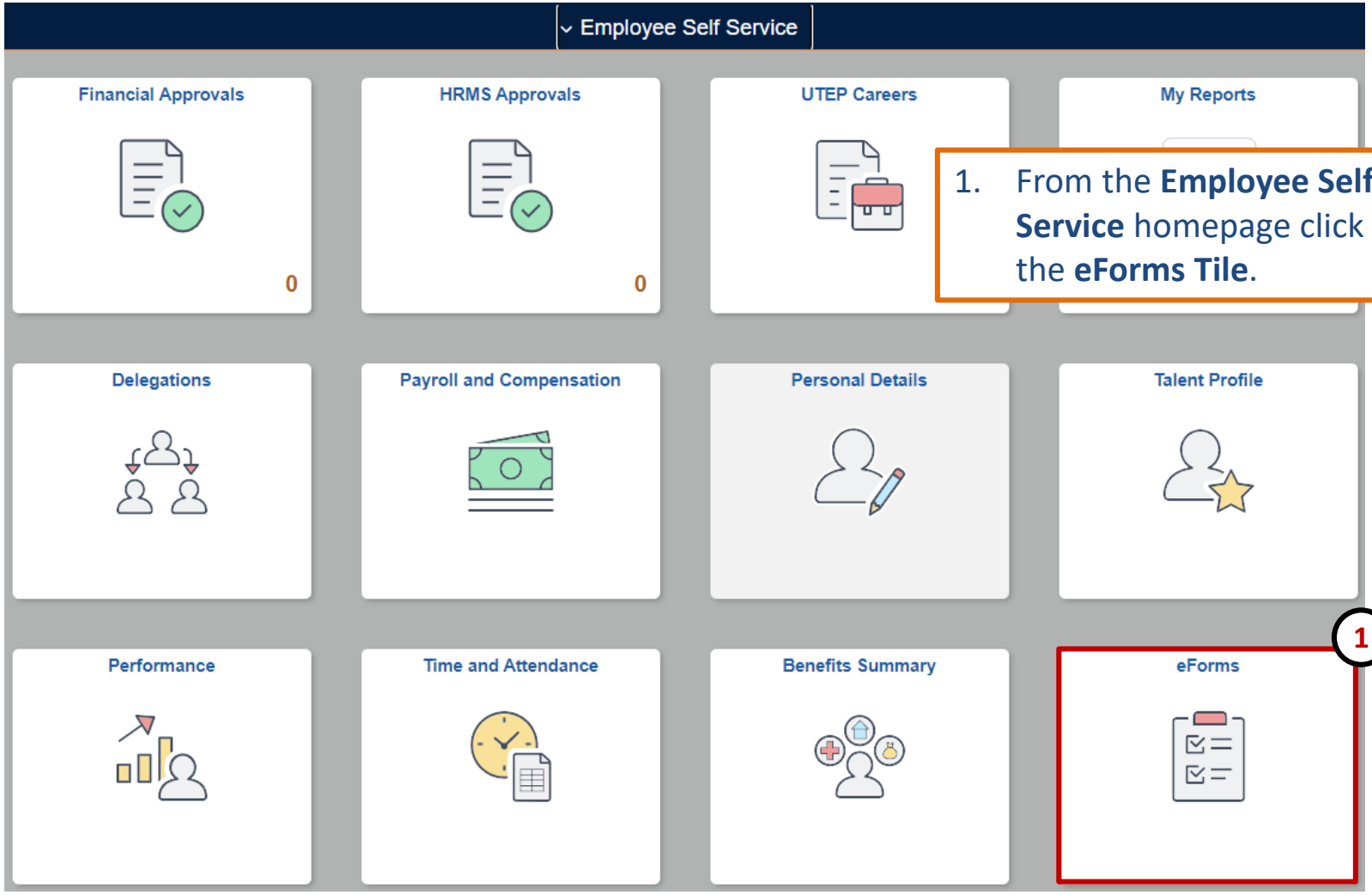
Cost Center EGDL03 ILT -NTT SALARIES

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***

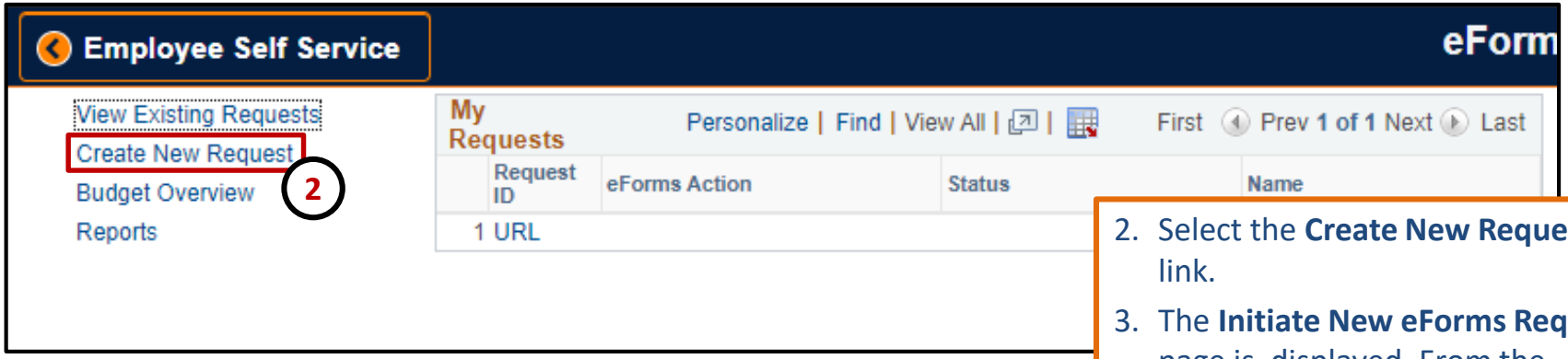
Color	Description
White	Budgetary Account is not in overdraft
Yellow	Budgetary Account is in overdraft
Blue	Amount for the current request
Pink	Amounts for other pending eForms requests
Red	Cost Center or Project is in overdraft

Initiating a Position Funding Change eForm

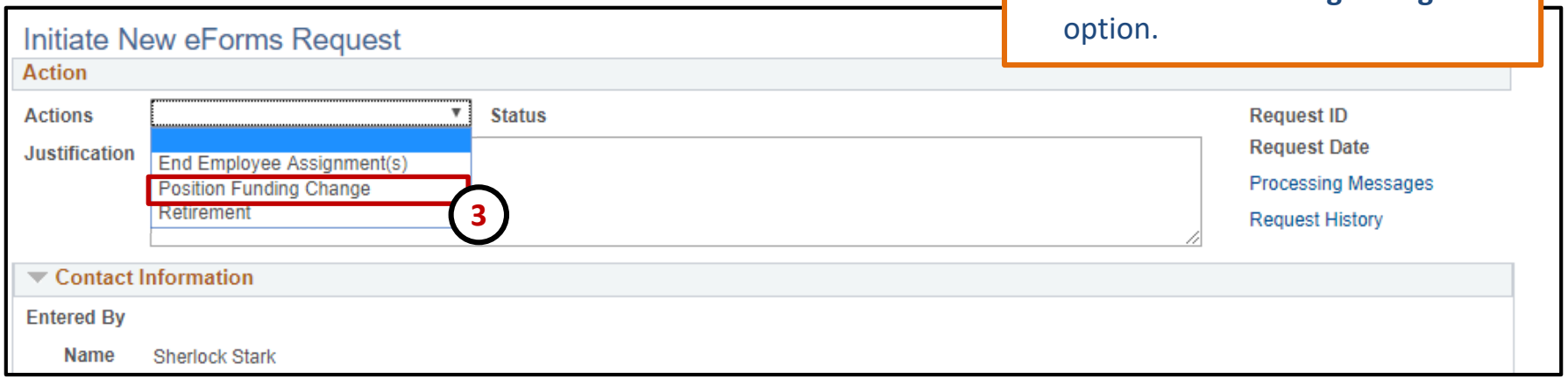


1. From the **Employee Self Service** homepage click on the **eForms Tile**.

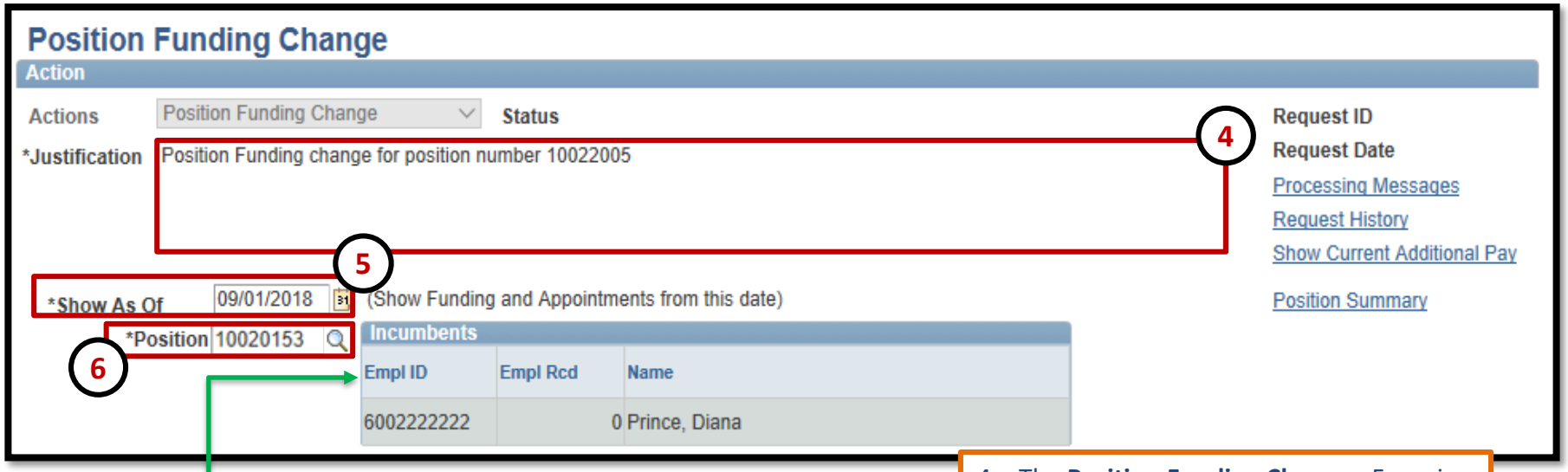
Initiating a Position Funding Change eForm



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 Funding Change** option.



Initiating a Position Funding Change eForm



4. The **Position Funding Change** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.
5. Modify the **Show As Of Date**, if needed. Please note this date will always default to the first of the current fiscal year. The date entered will display the position information "as of" the date selected.
6. Enter or look up the **Position Number.**

   Note: If the position is filled, the current incumbent's information will display in the **Incumbents** section.

Initiating a Position Funding Change eForm

Current Position Information

Effective Date	05/01/2014	
Status	Active	
Reason Code	Position Data Update	
Business Unit	UTE04	Business Affairs
Department	301500	PeopleSoft
Job Code	10405	Manager
Job Title	Manager	
Reg/Temp	Regular	
Full/Part Time	Full-Time	
FLSA Status	Exempt	
Empl Class	Administrative / Profe	
Sal Plan	UTEP Administrative Profssnl	
Proposed Salary		
Budgeted Amt		
Acdmc Rnk		
FTE	1.000000	
Stnd Hrs/Wk	40.00	
Max Head Cnt	1	
Reports To Pos	10024078	
Reports To Name	Iris Niestas	
Reports To Email	IRNIESTAS@UTEP.EDU	
Location Code	1	
Mail Drop ID	00649	

- [ ] Key Position
- [x] Budgeted Position
- [x] Permanently Budgeted

7

7. The **Current Position Information** section will show position attribute data as of the "Show as of" date provided.

   Note: This information is not editable

Initiating a Position Funding Change eForm

8

Current Funding

Start Date 09/01/2018

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	30102311	ECON-JPMORGAN CHASE BANK PROF			08/31/2018	100.000	

8. The Current Position Information section will show position attribute data as of the effective date provided.

Note: This information is not editable

9

Proposed Funding Find First 1 of 1 Last

9a

*Start Date 09/01/2018

9d

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	14021600	PEOPLESOFT VPBA				50.000	
			226860067A	Hispanic Serving Institutions:	08/31/2019	50.000	

9b 9c

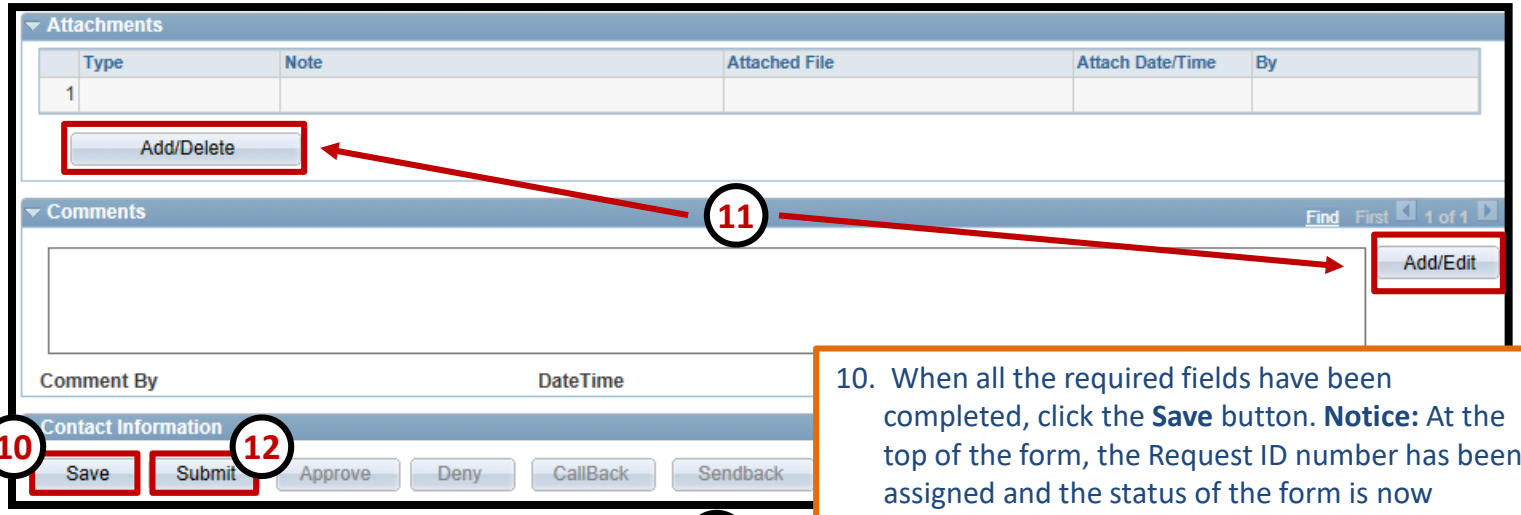
9. In the Proposed Funding section update the funding source information, as needed.
   - 9a. Verify the start date is correct.
   - 9b. Enter the new cost center or project ID (in the respective field), add the funding end date (if applicable) and enter the distribution percentage.
   - 9c. If adding more than one funding source click the **+** button next to Est. Expense column. A new line will appear, repeat step 8b.
   - 9d. 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 8b.

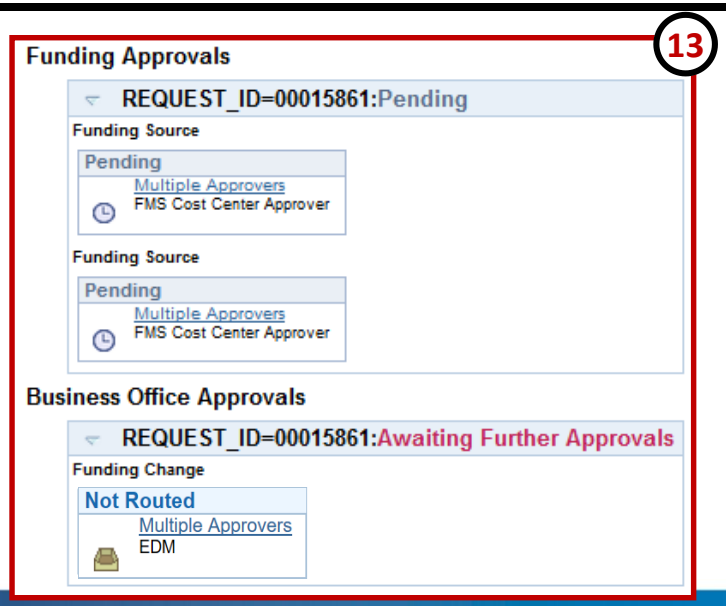
PeopleSoft Tip

When making changes to the funding source:

- **DO NOT** make any changes to lines that hold an earn code (Ern Cd), making changes may affect additional pay, supplemental pay, cell phone allowances and etc.
- 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.

Initiating a Position Funding Change eForm





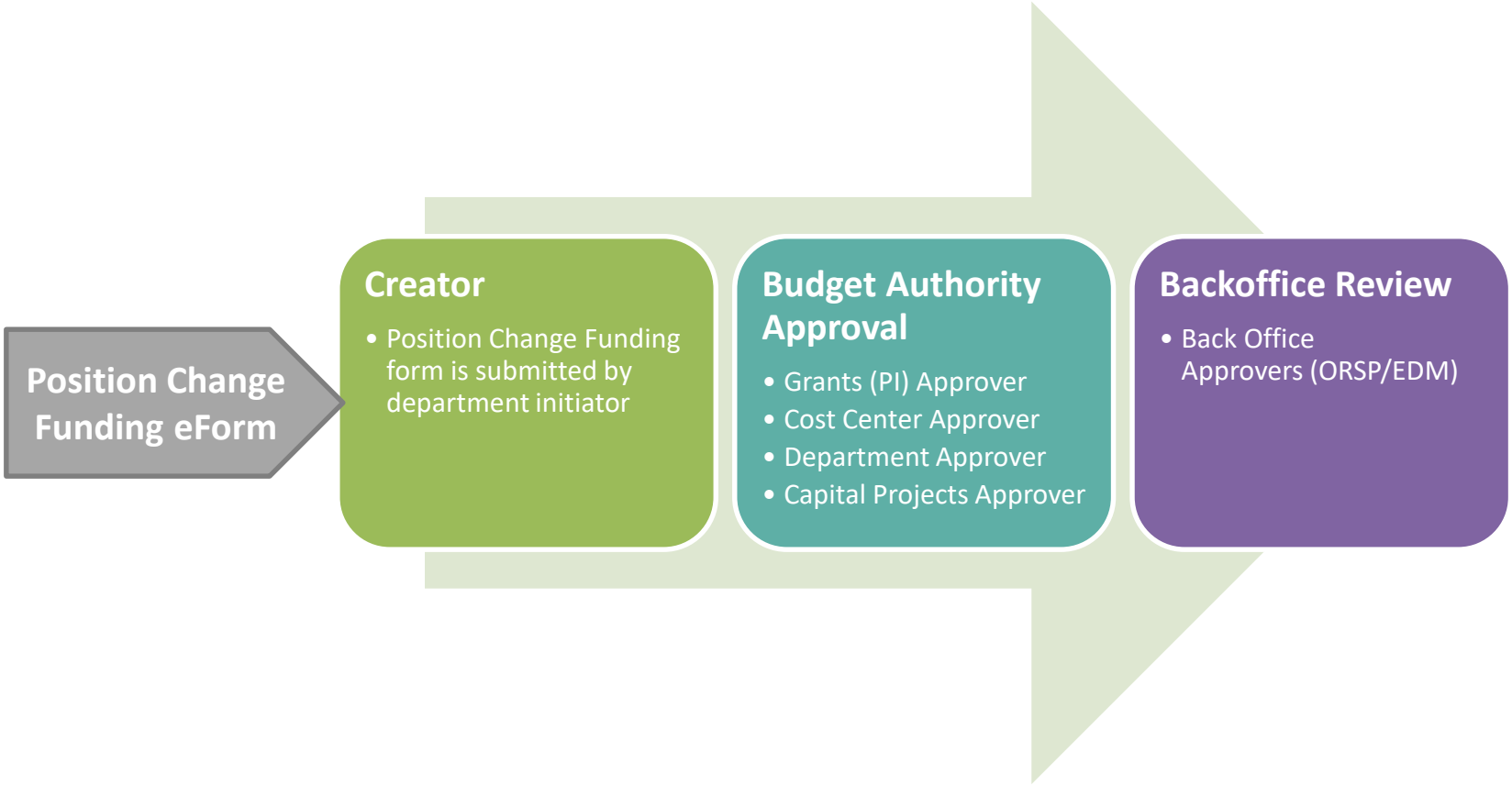
10. When all the required fields have been completed, click the **Save** button. **Notice:** At the top of the form, the Request ID number has been assigned and the status of the form is now "Saved."
11. Expand the **Attachments** or **Comments** section to attach required documentation and include any 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.

Funding End Date

DBT Requires end dates for:

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

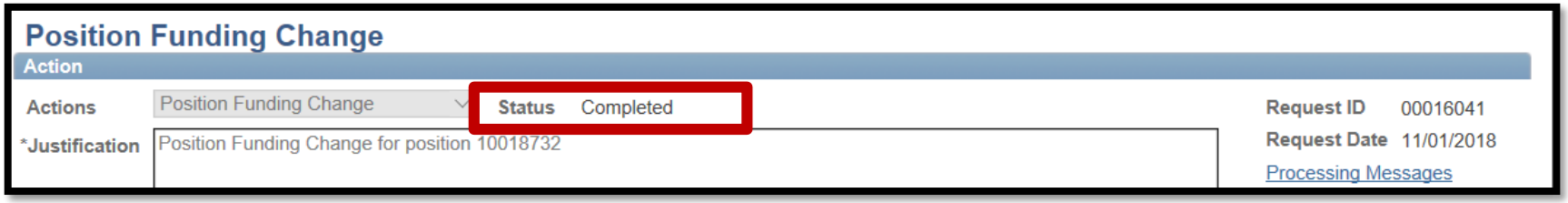
Position Funding Change Workflow



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



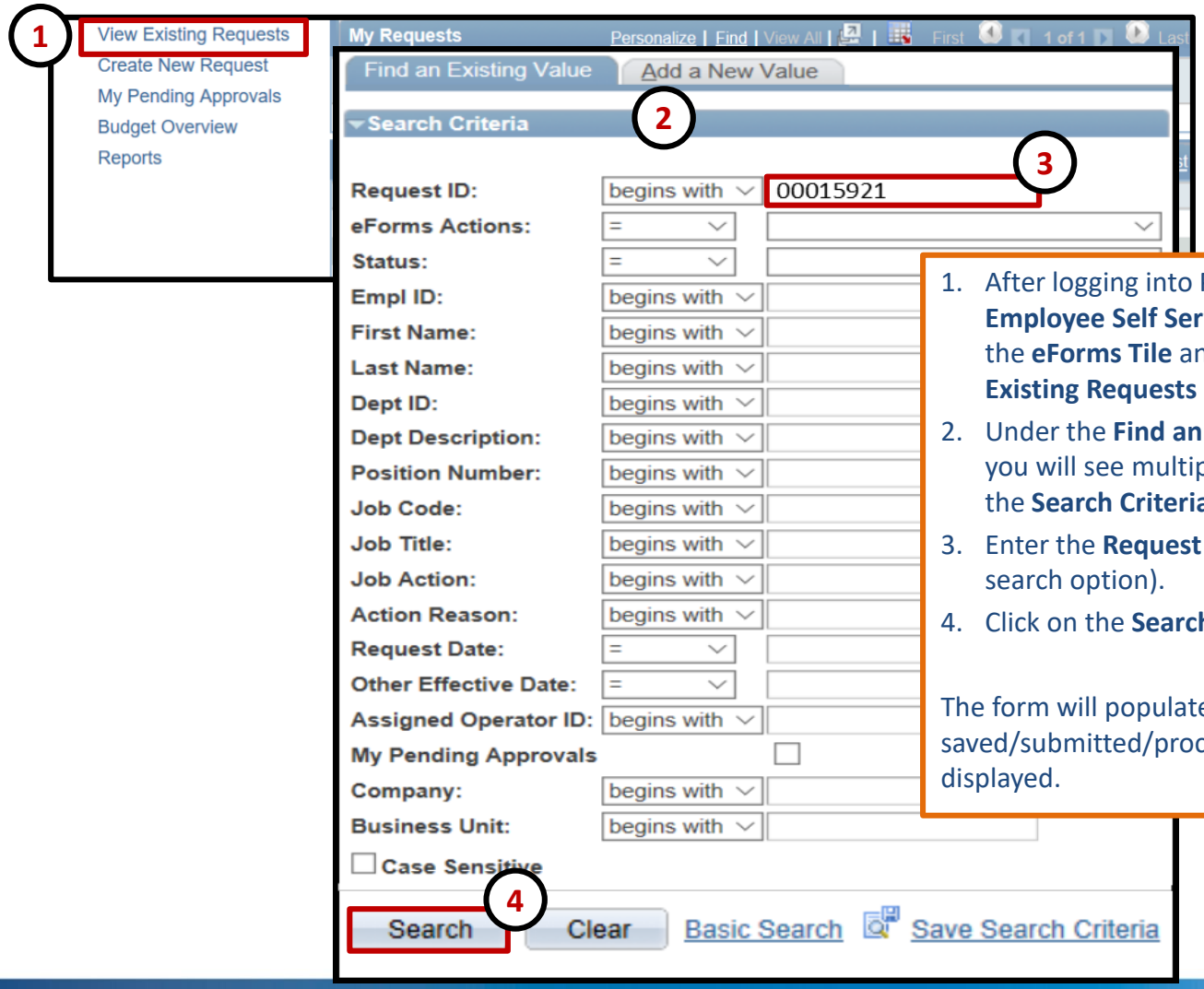
eForm Status*	Description
Saved	Form has been saved and is pending with the creator for submission
Pending Approvals	Form has been submitted and is routing for approval
Call Back for Revision	Form was submitted but called back by the creator for modification
Sent Back for Revision	Form has been sent 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.**

PEOPLESOFT
THE UNIVERSITY OF TEXAS AT EL PASO

UT SHARE

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:

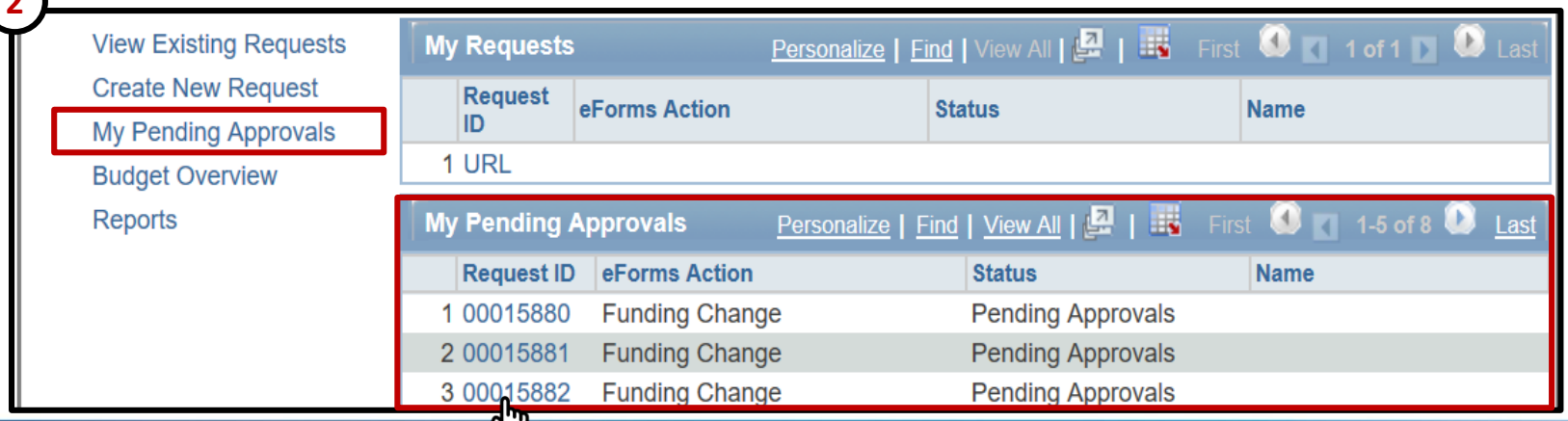
1) "E-MAIL" method:

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

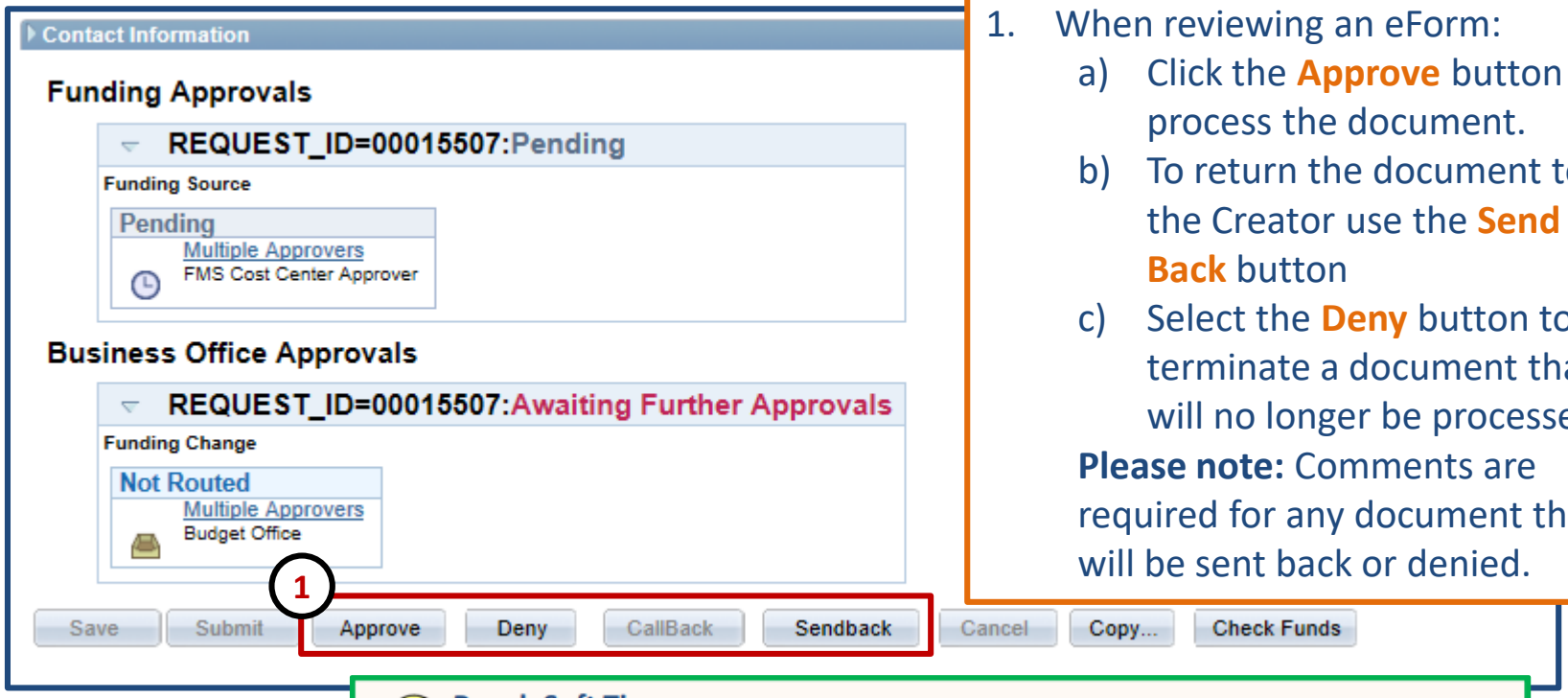
2) "eForms section" method:

- 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 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 HRTC@utep.edu
- **Last Date Worked** is the employee's last working day at UTEP
- On the Job record, the **Effective Date** is always the day after the actual last date worked even if it is a weekend or holiday
- Before submitting a form, verify all leave and/or timesheets has been entered into the system

eForms Phase II

What's to come

- New Positions & Positions Changes
- New Appointments & Re-Appointments

When?

- Spring 2019

Questions

Thank You

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