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?

• eForms enable electronic processing in PeopleSoft, approval routing, and provide audit and reporting capabilities.
• eForms will be available for new appointments, rehires, transfers, position changes, and updates to job information.
• New Features:
  - Search Match
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.
• **Important:** Effective April 6, 2020, the Appointment Actions Request and the Position Request & Modifications IAP forms will be replaced by the newest eForms. All other IAP forms will remain active.
• DBTs will no longer require processing. Funding submissions/changes will be completed with the new/current eForms.
Initiating an eForm

From the Employee Self Service home page, scroll down and click on the eForms Tile.
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.

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.
4. Use the **Select** button if the correct match has been found.

Note: You can also validate the information by reviewing the “Phone” and “Address” tabs.
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.
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.
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)
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

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

<table>
<thead>
<tr>
<th>New Position Requests</th>
<th>Action</th>
<th>Status</th>
<th>Request ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions</td>
<td>New Position ID Requests</td>
<td></td>
<td>Request Date</td>
</tr>
<tr>
<td>Justification</td>
<td></td>
<td></td>
<td>Processing Messages</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Request History</td>
</tr>
</tbody>
</table>

#### 4. Justification
- Use the Justification text box to explain or “justify” the reason for the eForm action requested.

#### 5. Position Eff Date
- 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. Stnd Hrs/Wk, Reports To, & Location Code
- The Stnd Hrs/Wk, Reports To, & Location Code, and Proposed Rate will need to be updated as well.

**Proposed Position Information**

<table>
<thead>
<tr>
<th>Position</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>301100 Budget and Personnel Svcs</td>
</tr>
<tr>
<td>Job Code</td>
<td>10405 Manager</td>
</tr>
<tr>
<td>Job Title</td>
<td>Manager</td>
</tr>
<tr>
<td>Reg/Temp</td>
<td>Regular</td>
</tr>
<tr>
<td>Full/Part Time</td>
<td>Full-Time</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Exempt</td>
</tr>
<tr>
<td>Emp Class</td>
<td>Administrative / Professorial</td>
</tr>
<tr>
<td>Sal Plan</td>
<td>UTEP Administrative Professional</td>
</tr>
<tr>
<td>ETE</td>
<td>1.000000</td>
</tr>
<tr>
<td>Stnd Hrs/Wk</td>
<td>40.00</td>
</tr>
<tr>
<td>Reports To Pos</td>
<td>10020153</td>
</tr>
<tr>
<td>Reports To Name</td>
<td>Jaime Huerta</td>
</tr>
<tr>
<td>Reports To Email</td>
<td><a href="mailto:JHUERTA4@UTEP.EDU">JHUERTA4@UTEP.EDU</a></td>
</tr>
<tr>
<td>Location Code</td>
<td>1</td>
</tr>
</tbody>
</table>
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)
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
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.
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).

Will you discuss search match?
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.
Funding will need to be provided from the first day of the appointment until the last day of the appointment.
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.
Appointment Workflow

- **Creator**
  - Appointment eForm is submitted by department initiator

- **Department Approvals**
  - Reports To
  - Funding Approver

- **Backoffice Approvals**
  - Financial Aid/OCSEO
  - Grant Support Center
  - EDM

Appointment eForm
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
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

<table>
<thead>
<tr>
<th>Current Position Information</th>
<th>Proposed Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position</strong></td>
<td>10019144</td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td>05/01/2019</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Active</td>
</tr>
<tr>
<td><strong>Reason Code</strong></td>
<td>Position Data Update</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>University of Texas, El Paso</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>203000</td>
</tr>
<tr>
<td><strong>Job Code</strong></td>
<td>16343</td>
</tr>
<tr>
<td><strong>Job Title</strong></td>
<td>Guard I</td>
</tr>
<tr>
<td><strong>Reg/Temp</strong></td>
<td>Regular</td>
</tr>
<tr>
<td><strong>Full/Part Time</strong></td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>FLSA Status</strong></td>
<td>Nonexempt</td>
</tr>
<tr>
<td><strong>Empl Class</strong></td>
<td>Classified</td>
</tr>
<tr>
<td><strong>Sal Plan</strong></td>
<td>UTEP Classified</td>
</tr>
<tr>
<td><strong>Proposed Salary</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Budgeted Amt</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Acme Rnk</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FTE</strong></td>
<td>1.000000</td>
</tr>
<tr>
<td><strong>Stnd Hrs/Wk</strong></td>
<td>40.00</td>
</tr>
<tr>
<td><strong>Max Head Cnt</strong></td>
<td>1</td>
</tr>
<tr>
<td><strong>Reports To Pos</strong></td>
<td>10021624</td>
</tr>
<tr>
<td><strong>Reports To Name</strong></td>
<td>Florencio Ramirez</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:FRAMIREZ61@UTEP.EDU">FRAMIREZ61@UTEP.EDU</a></td>
</tr>
<tr>
<td><strong>Location Code</strong></td>
<td>OTHR</td>
</tr>
<tr>
<td><strong>Mail Drop ID</strong></td>
<td>00631</td>
</tr>
</tbody>
</table>

- 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.

   **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.
PAC Workflow

Creator
- PAC eForm is submitted by department initiator

Department Approvals
- Reports To

Backoffice Review
- EDM

PAC eForm
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.
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

- 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 JAC 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.
JAC Workflow

**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.
Initiating a Transfer eForm

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.
## Initiating a Transfer eForm

### Current Position Information
- **Position**: UTEP1
- **Company**: University of Texas, El Paso
- **Business Unit**: UTEP
- **Department**: 301100 Budget and Personnel Svcs
- **Job Code**: 10404 Assistant Director

### Proposed Position Information
- **Position**: UTEP1
- **Company**: University of Texas, El Paso
- **Business Unit**: UTEP
- **Department**: 901100 Budget and Personnel Svcs
- **Job Code**: 10404 Assistant Director

### Relevant Notes:
- 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.
The Rate will need to be updated based on the approvals received.

The proposed funding for staff will need to be updated based upon the approvals received from SEAR.

The proposed funding for Faculty & Students will be approved based on allowable available funds.
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

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:

<table>
<thead>
<tr>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>Budgetary Account is not in overdraft</td>
</tr>
<tr>
<td>Yellow</td>
<td>Budgetary Account is in overdraft</td>
</tr>
<tr>
<td>Blue</td>
<td>Amount for the current request</td>
</tr>
<tr>
<td>Pink</td>
<td>Amounts for other pending eForms requests</td>
</tr>
<tr>
<td>Red</td>
<td>Cost Center or Project is in overdraft</td>
</tr>
</tbody>
</table>

Color Guide of **Review Available Funds***
Funding End Date

DBT Requires End Dates for:

• Positions funded by grants
• Faculty not on contract
• All monthly students
• Temporary staff
## Button Description

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

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

* 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.
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: 10018317
   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.

Employee Self Service

eForms Portal Pagelet

My Pending Approvals

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

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**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 EDMQA@UTEP.EDU
Questions
Thank You