eForms
(Phase I)
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
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:**

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

*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.
1. After logging into PeopleSoft, under the home page look for the eForms section and select the Create New Request link.
2. The Initiate New eForms Request page is displayed. From the “Actions” drop down menu, select the End Employee Assignment(s) option.
Initiating an End Employee Assignment eForm

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.
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.
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

<table>
<thead>
<tr>
<th>Separation Reason</th>
<th>Completed by</th>
<th>When to use?</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Assignment</td>
<td>Department</td>
<td>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.</td>
</tr>
<tr>
<td>Resign for Better Job Opportunity</td>
<td>Department</td>
<td>Employee is resigning due to other job opportunity (attach resignation letter)</td>
</tr>
<tr>
<td>Resign for Better Pay/ Benefits</td>
<td>Department</td>
<td>Employee is resigning due to better pay/benefits opportunity (attach resignation letter)</td>
</tr>
<tr>
<td>Resign for Personal Reasons &amp; Other</td>
<td>Department</td>
<td>Employee is resigning due to personal reasons (attach resignation letter)</td>
</tr>
<tr>
<td>Resign for Relocation</td>
<td>Department</td>
<td>Employee is resigning due to relocation (attach resignation letter)</td>
</tr>
</tbody>
</table>
End Employee Assignment(s) Workflow

Creator
- End Employee Assignment(s) eForm is submitted by department initiator

Backoffice Review
- Review reason codes (ER)

Backoffice Review
- Back Office Approvers- (EDM)
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. After logging into PeopleSoft, under the home page look for the eForms section and select the Create New Request link.
2. The Initiate New eForms Request page is displayed. From the “Actions” drop down menu, select the Retirement option.
3. The Retirement 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.

5. 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.

6. 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.
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.
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.
Retirement Workflow

Creator
- Retirement eForm is submitted by department initiator

Backoffice Review
- HR Benefits

Backoffice Review
- Back Office Approvers - (EDM)
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:

<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>
1. After logging into PeopleSoft, under the home page look for the eForms section and select the Create New Request link.

2. The Initiate New eForms Request page is displayed. From the “Actions” drop down menu, select the Position Funding Change option.
3. The Position Funding Change eForm is displayed. Use the Justification text box to explain or “justify” the reason for the eForm action requested.

4. 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.

5. Enter or look up the Position Number. 

   Note: If the position is filled, the current incumbent’s information will display in the Incumbents section.
6. The **Current Position Information** section will show position attribute data as of the “Show as of” date provided. **Note:** This information is not editable.
The Current Position Information section will show position attribute data as of the effective date provided.

Note: This information is not editable.

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

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

11. Click the **Submit** button.

12. 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

**Creator**
- Position Change Funding form is submitted by Department initiator

**Budget Authority Approval**
- Grants (PI) Approver
- Cost Center Approver
- Department Approver
- Capital Projects Approver

**Backoffice Review**
- Back Office Approvers (ORSP/Budget Office)
# Button Description

<table>
<thead>
<tr>
<th>Button</th>
<th>Access</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Creators</td>
<td>Saves latest changes added to the document</td>
</tr>
<tr>
<td>Submit</td>
<td>Creators</td>
<td>Sends document to the next approver in workflow, form cannot be modified</td>
</tr>
<tr>
<td>CallBack</td>
<td>Creators</td>
<td>Recalls document back to the creator for modifications</td>
</tr>
<tr>
<td>Cancel</td>
<td>Creators</td>
<td>Creator terminates the document and makes it unavailable for processing</td>
</tr>
<tr>
<td>Copy</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>Approve</td>
<td>Approvers</td>
<td>Approves document as is with no adjustments</td>
</tr>
<tr>
<td>Deny</td>
<td>Approvers</td>
<td>Approver terminates the document and makes it unavailable for processing</td>
</tr>
<tr>
<td>Sendback</td>
<td>Approvers</td>
<td>Approver returns document to creator for modification</td>
</tr>
<tr>
<td>Check Funds</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.
Searching for Existing Requests

1. After logging into PeopleSoft, under the home page look for the eForms section 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

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, on the home page look for the eForms section.
   - Under My Pending Approvals, select the document to review/approve.
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?

• Summer 2019
Questions
Thank You