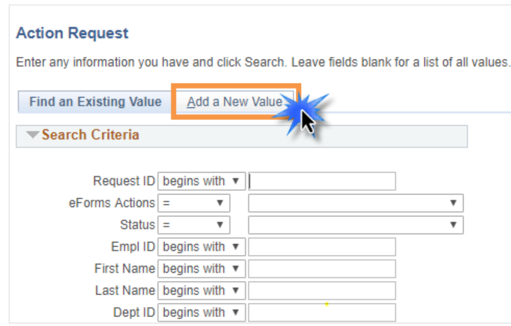
Add New Assignment

The Add New Assignment form is used to assign an employee to a position. This includes new hires and rehires. To create a new assignment, complete the following steps:

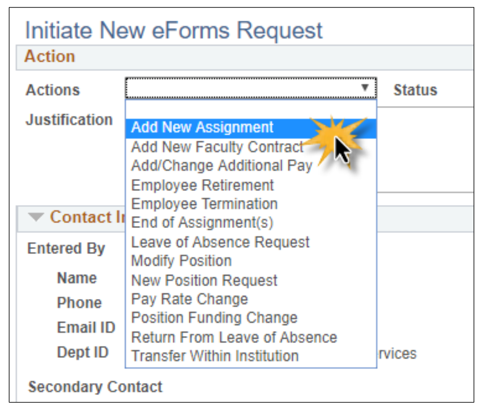
1) In UT Share, navigate to the Action Request page. NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

2) Click the Add a New Value tab.



3) Select the Add New Assignment Form

4) Use the Justification text box to explain or justify the reason for the request. (Optional)

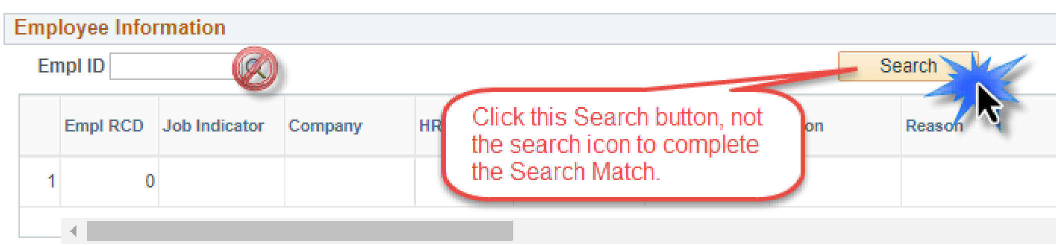


5) Complete the Employee Information and Search Match

   The **Employee Information** section is used to identify the incumbent you are assigning to the position.

   When appointing a new or existing employee, you should always perform **Search Match**. This feature searches multiple PeopleSoft environments to help identify Empl IDs and check for duplicate or multiple records for students and employees across UT Campuses (e.g. UT El Paso, UT Permian Basin, UT San Antonio, UT Tyler, UT System). To perform a Search Match:

   a. Leave the **Empl ID** field blank. Click the **Search** button.



   b. The **Search Match** page is displayed. Enter the new hire **Name (First and Last)** * and **Empl ID** (if known) and then click **Search**.

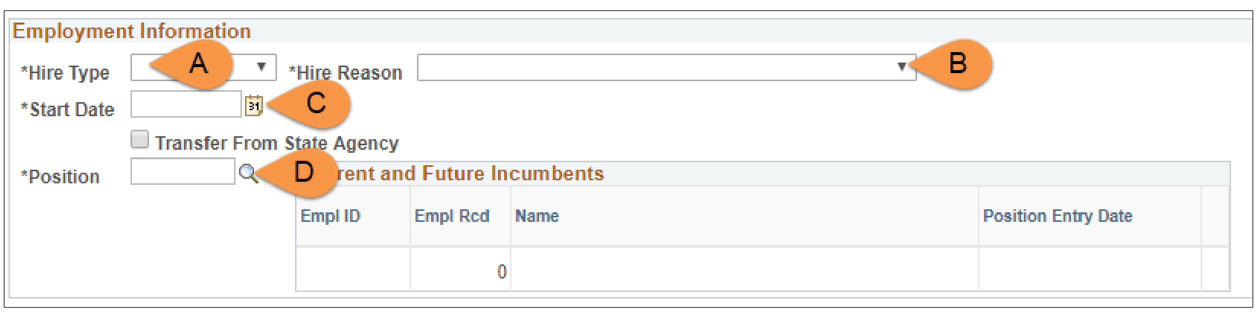
*Must enter at least two letters of both first and last name.

If a match is found, click the **Select** button to return to main page. If a match is not found, click **Cancel** and proceed to the next step.

6) Complete the Employment Information Section

Enter the following pieces of information on the form:

A. Hire Type
B. Hire Reason
C. Start Date
D. Position



A. Select the **Hire Type** and **Hire Reason.** The Hire Type will determine the Hire Reason.

Hire Type	Hire Reason
Hire	• **Add POI (Person of Interest)** • **Direct Transfer: Other TX Higher Ed** • **Direct Transfer: Other UT Institution** • **Direct Transfer: TX State Agency** • **Hire** - used for additional appointments or new hires • **Return to Work Retiree**
Rehire	• **Add POI (Person of Interest)** • **Direct Transfer: Other TX Higher Ed** • **Direct Transfer: Other UT Institution** • **Direct Transfer: TX State Agency** • **Rehire: Returning Retiree** • **Rehire: Reverse Termination** • **Rehire: Same Institution**

B. If the incumbent is transferring from another State of Texas Agency, select the **Transfer From State Agency** checkbox.

C. Enter the assignment **Start Date**.

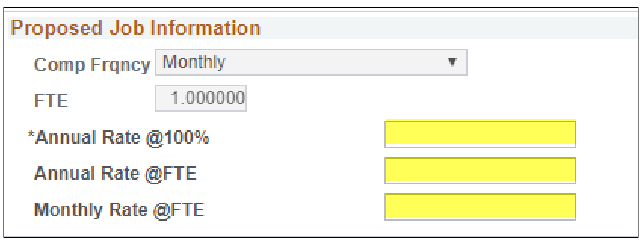
D. Enter or lookup the **Position** ID number where the incumbent will be assigned.

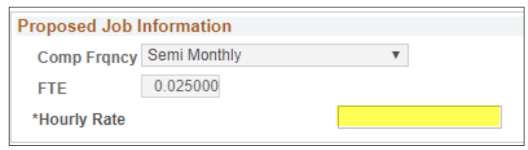
Note: *If there is an existing employee assigned to the position, their name will display in the **Current and Future Incumbents** grid.*

7) Complete the Proposed Job Information Section

The **Proposed Job Information** section is used to enter compensation information. The required fields are different for Staff, Student or Faculty:

If the request is for a Staff or Student, complete the following fields and proceed to step eight:

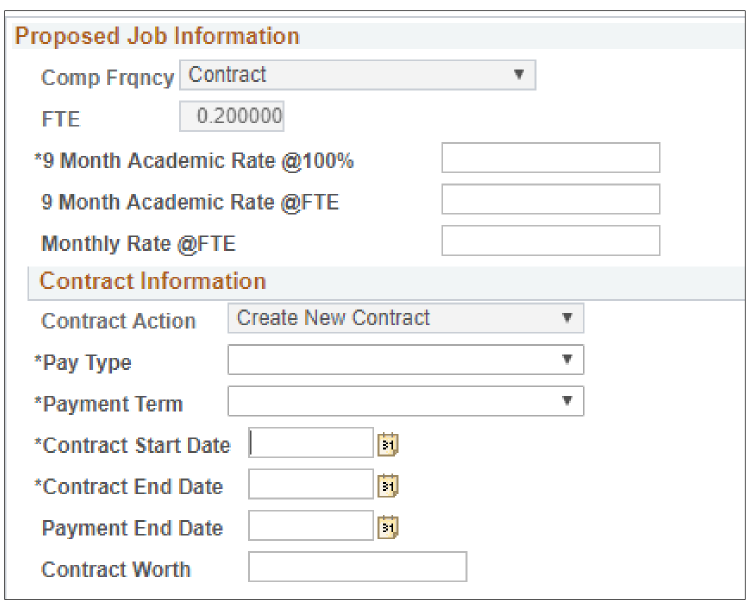




a. **The Compensation Frequency** and **FTE (Full Time Equivalency)** defaults with the appropriate value based on the Position number.

b. Depending on the position type, enter the proposed **Annual Rate**, or **Hourly Rate** and press enter or tab-out of the field.

If the request is for a Faculty, complete the following fields and then proceed to step eight:



a. **Proposed 9 MO Academic Rate @ 100%:** Use this field to provide the proposed salary based on a 100% appointment.

- **Proposed 9 MO Academic Rate @ FTE:** Based on the position's FTE, this field will reflect what the faculty member will be paid (using the 100% 9-month academic rate and FTE).

- **Proposed Monthly @ FTE:** Based on the position's FTE, this field will reflect what the faculty member will be paid on a monthly basis (using the 100% 9-month academic rate and FTE).

Note*: Instead of entering the* ***9 mo Academic Rate*** *or* ***Monthly Rate****, complete the* ***Contract Information*** *section. Once the* ***Contract Worth*** *is entered, the 9 mo Academic and Monthly Rate will default with the appropriate values.*

b. Enter the **Contract Information**:

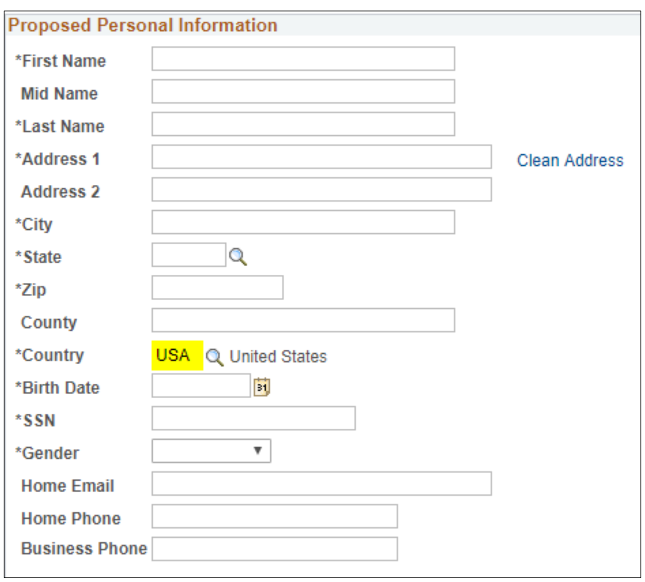
- Select the contract **Pay Type** from the drop-down menu. The options are**:**
  - **Faculty 9/9** – paid over 9 months
  - **Pay Over Contract** – paid over a specific period of time
- Based on the "Contact Pay Type" selected, the **Payment Term** will default to the appropriate value:
  - **Pay Over 'X' Dates**
  - **Pay Over 1.5 Months**
  - **Pay Over 4.5 Months**
- Provide the **Contract Start Date, Contract End Date**, and **Payment End Date**.
- Enter the **Contract Worth**.

8) Complete the Proposed Personal Information Section

The **Personal Information** section is used to enter or update the incumbents information:

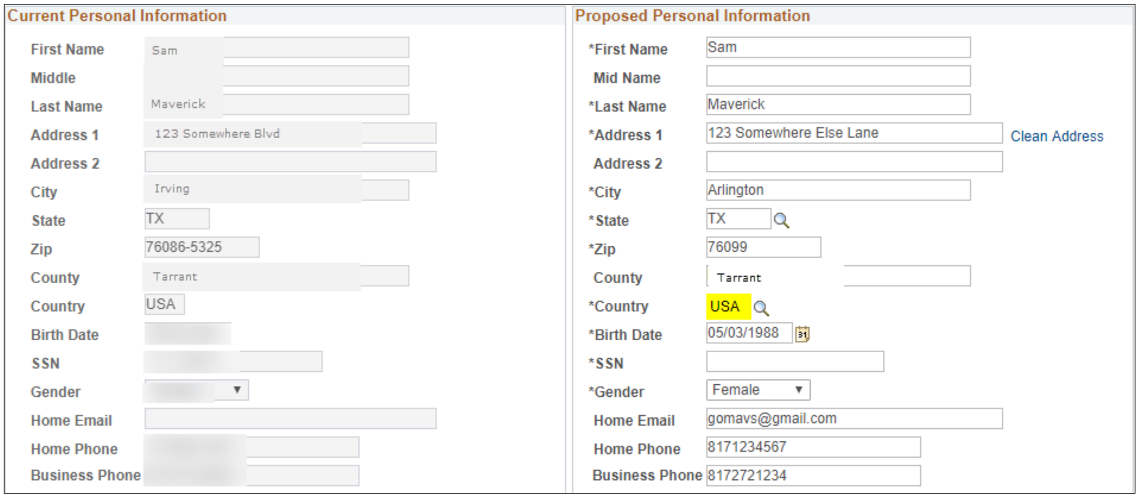
New Employee:

If the incumbent is a new employee, complete the **Proposed Personal Information** section. Provide information such as First Name, Last Name, Address, Home Email, Phone Number, etc.


Proposed Personal Information
*First Name
Mid Name
*Last Name
*Address 1
Clean Address
Address 2
*City
*State
*Zip
County
*Country USA United States
*Birth Date
*SSN
*Gender
Home Email
Home Phone
Business Phone

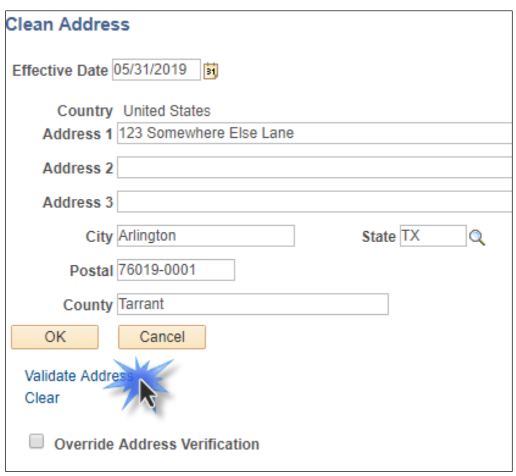
Existing Employee:

If the incumbent is an existing employee, the employee's **Current Personal Information** is displayed. Review and make the necessary changes in the **Proposed Personal Information** section.



9) Clean and Validate the Employee Address

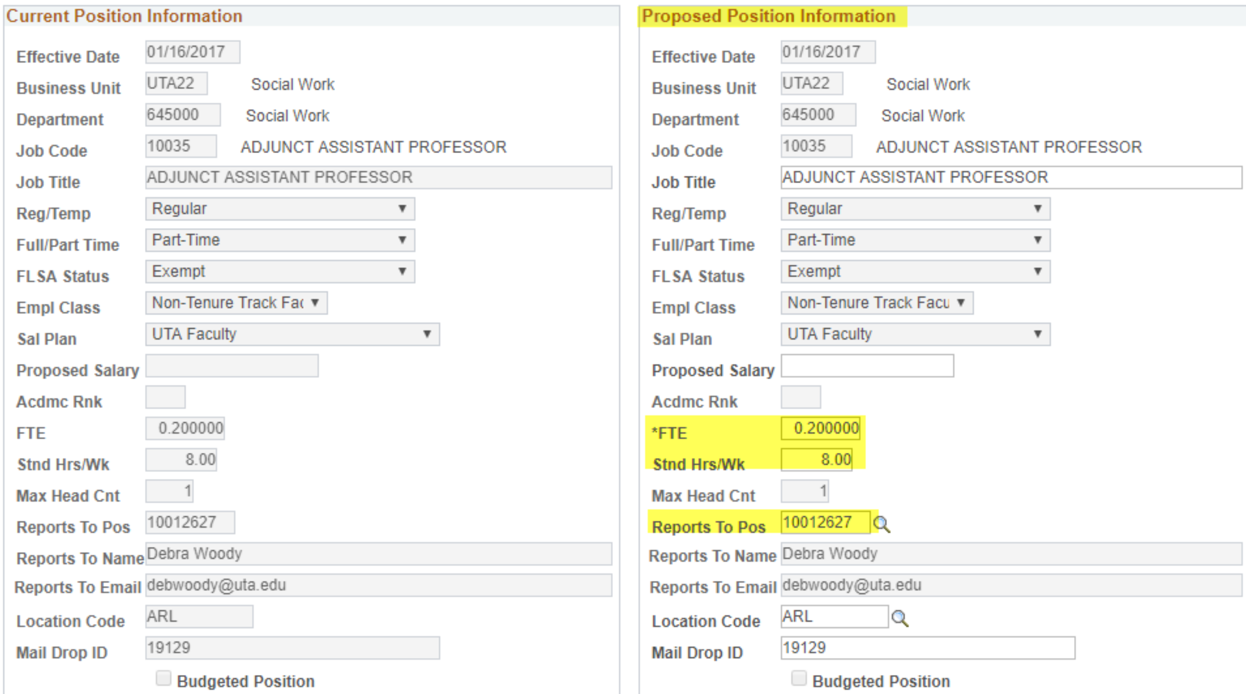
After entering or updating the incumbents address, select the **Clean Address** link to validate the address. From the **Clean Address** page, click the **Validate Address** link and then select **OK**.



Note: *If an exact address match is not found, a suggestion box appears to allow you to select from a list of possible addresses. If applicable, choose one of the addresses provided in the list, or click* ***OK*** *to return to the main page of the eForm.*

10) Complete the Proposed Position Information Section

Based on the Position number entered in the **Employment Information** section, the position attributes are displayed in the **Current Position Information** section. If necessary, use the **Proposed Position Information** section to update the **FTE**, **Std Hrs/Wk**, and/or the **Reports To**. Any other changes must be made using a Modify Position eForm.



11) Complete the Proposed Funding section

Use the **Proposed Funding** section to enter funding information for the new position.

Note: *The Proposed Funding section should show the funding for the entirety of the fiscal year (beginning September 1) regardless of the effective date of the funding change. For example, if the position funding change is to be effective March 1, the Proposed Funding section should show the prior funding with Start Date September 1 and a Funding End Date of February 28, then an additional Funding Period row added, with Start Date March 1.*

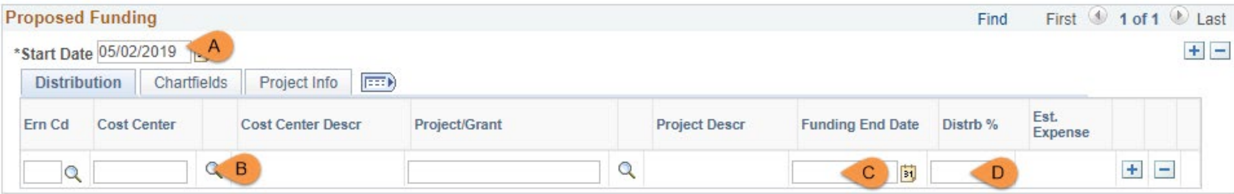
If the position effective date (aka the date the position was created) was within the Fiscal Year (after September 1), the Start Date should reflect the date the position was initially made effective.

Also, position funding from a Project will need to include a Funding End Date of either the end of the Fiscal Year (August 31) or the end of the Project, whichever comes first.

Enter the following fields:

A. Start Date
   Enter the effective date for the Proposed Funding in the Start Date field.
B. Cost Center, Cost Share or Project/Grant
   Enter the Cost Center, Cost Share or Project/Grant funding the position.
C. Funding End Date
   The Funding End Date for Projects or Cost Shares should be the end of the assignment, the project or fiscal year; whichever date is first. If the funding source is a Cost Center, leave the Funding End Date field blank.
D. Distribution percentage
   Enter the funding Distribution %. Funding may be split between different Cost Centers,

Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus [+] or minus sign [-] to add/remove an additional funding source.



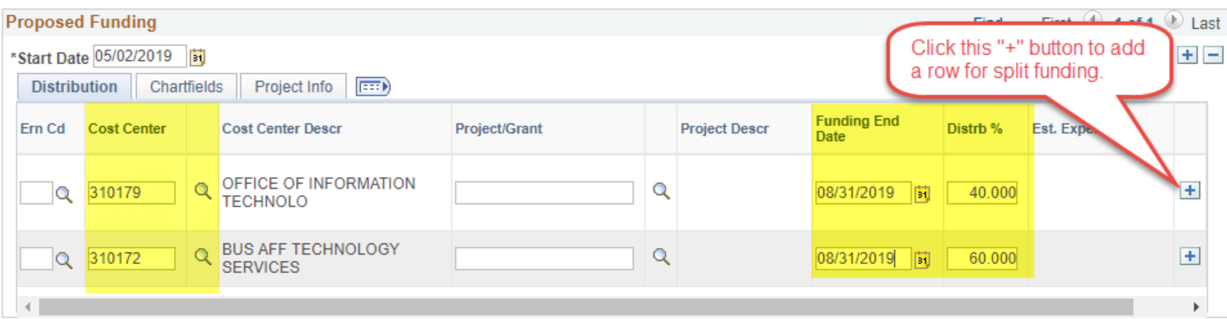
11a. Add additional or split funding

You may add split funding to the eForm by adding distribution rows and/or adding funding periods. To do so use the plus signs [+] at the end of the rows and in the upper-right corner of the Proposed Funding section.

11b. Add a Distribution Row

To enter split funding for the same time period, click the plus sign [+] in the right column of the **distribution tab** to insert a new row.

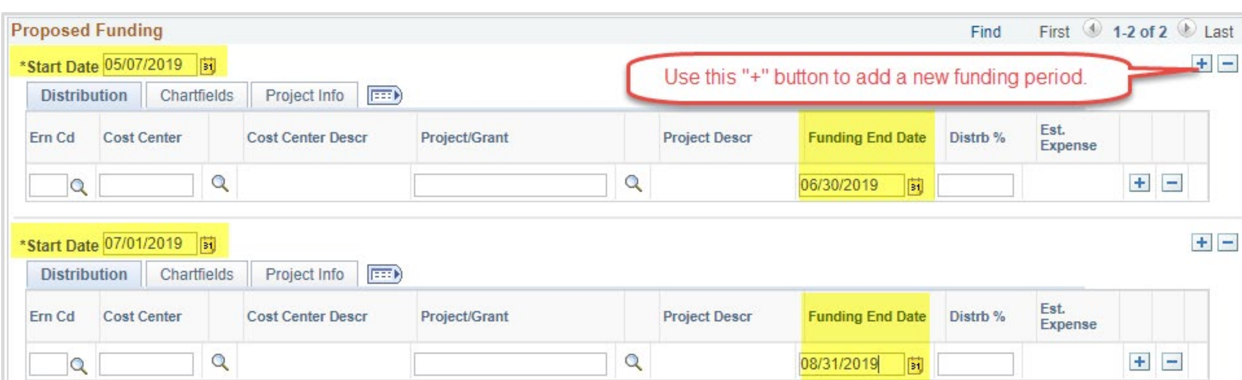
Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



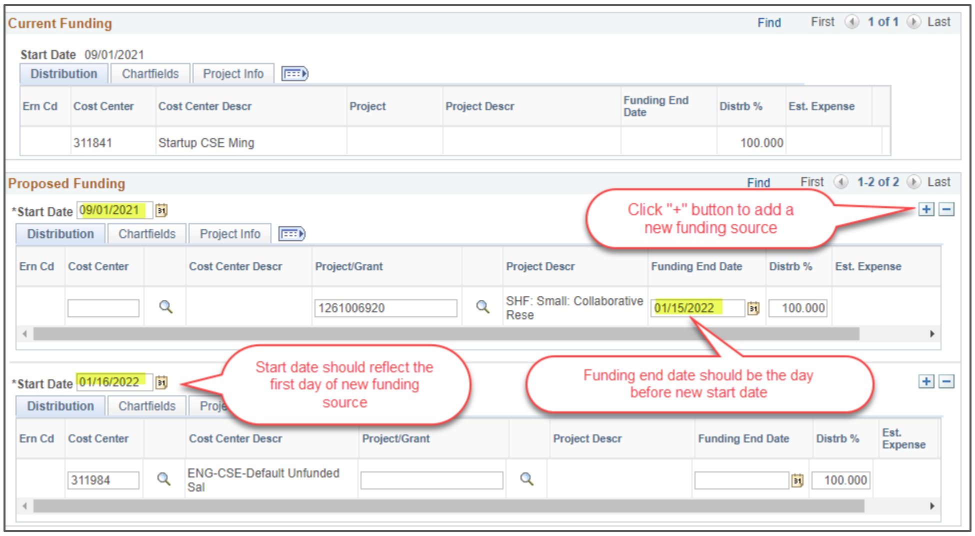
11c. Add a Funding Period

To enter funding with a different, **Start Date**, click the plus sign [+] in the upper-right corner of the **Proposed Funding** section to insert a new row.

Below is an example of Split funding over two funding periods (May/June & July/August).

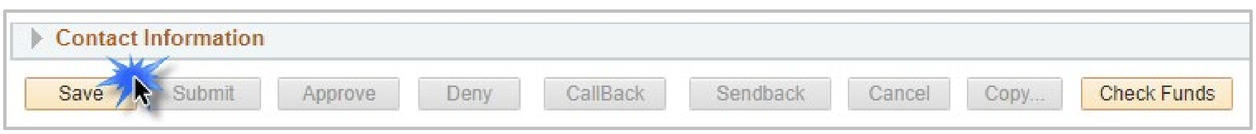


Note: *If an appointment is going to use an additional funding period, the first funding period must end prior to the start date of the next funding period. In this instance, you click on the "+" and enter the start for the next funding period.*



12) Click Save and Review Available Funds

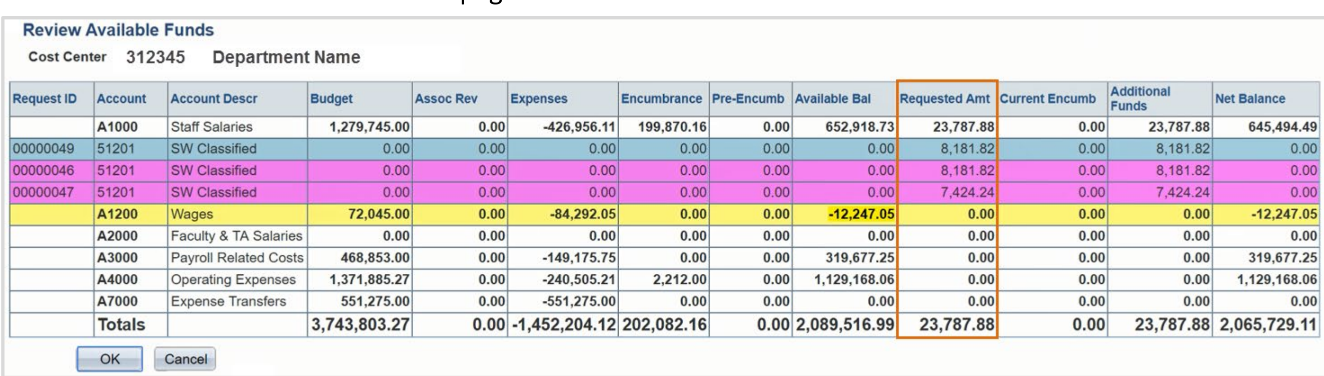
Once the required fields (indicated with an *asterisk) are completed, click **Save**. Once the form is saved, a **Request ID** number (e.g. 00002476) is assigned and the form status is displaying "Saved" at the top of the form.



The **Review Available Funds** page will automatically display once you have clicked save. This page is used to view the current condition of your Budget.

If the Cost Center, Cost Share or Project is overdrawn, take necessary actions to complete a budget transfer or revise the funding sources for the position on the eForm prior to submitting it. If the form is submitted with an overdrawn budget the budget office will not approve the form.

- The Requested Amount column displays the estimated expense for the current request and the estimated expenses for any other pending requests on the same cost center or project.
- Click **OK** to return to the main page of the form.



Review Available Funds

Cost Center 312345 Department Name

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	1,279,745.00	0.00	-426,956.11	199,870.16	0.00	652,918.73	23,787.88	0.00	23,787.88	645,494.49
00000049	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000046	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000047	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	7,424.24	0.00	7,424.24	0.00
	A1200	Wages	72,045.00	0.00	-84,292.05	0.00	0.00	-12,247.05	0.00	0.00	0.00	-12,247.05
	A2000	Faculty & TA Salaries	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	A3000	Payroll Related Costs	468,853.00	0.00	-149,175.75	0.00	0.00	319,677.25	0.00	0.00	0.00	319,677.25
	A4000	Operating Expenses	1,371,885.27	0.00	-240,505.21	2,212.00	0.00	1,129,168.06	0.00	0.00	0.00	1,129,168.06
	A7000	Expense Transfers	551,275.00	0.00	-551,275.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		3,743,803.27	0.00	-1,452,204.12	202,082.16	0.00	2,089,516.99	23,787.88	0.00	23,787.88	2,065,729.11

OK Cancel

Row colors on the Review Available Funds Page indicate the following:

Blue = the current eForm request

Pink = other pending eForm requests

Yellow = the budgetary account line is overdrawn (e.g. A1200)

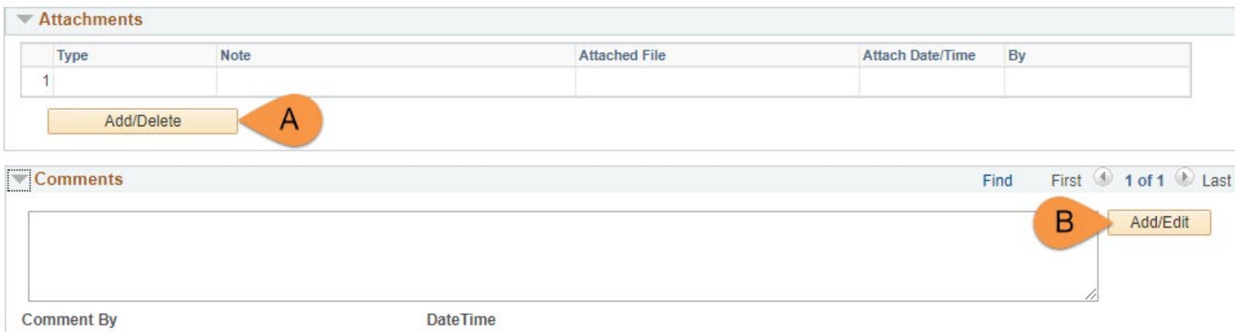
Red = overall budget is overdrawn

13) Add Attachments and Comments

A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.

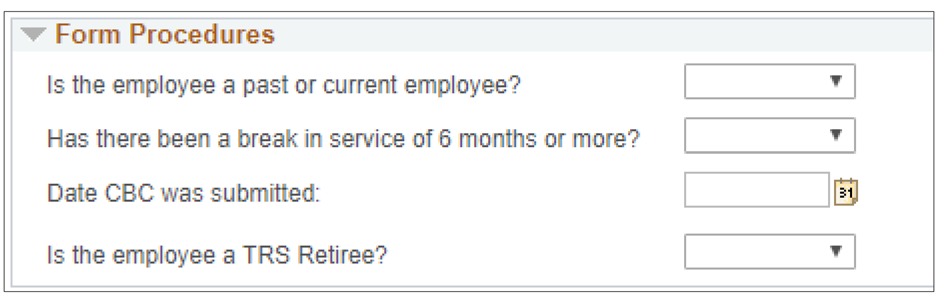
B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

Note: *Attachments and Comments cannot be added unless you have clicked Save.*



14) Complete the Form Procedures Section

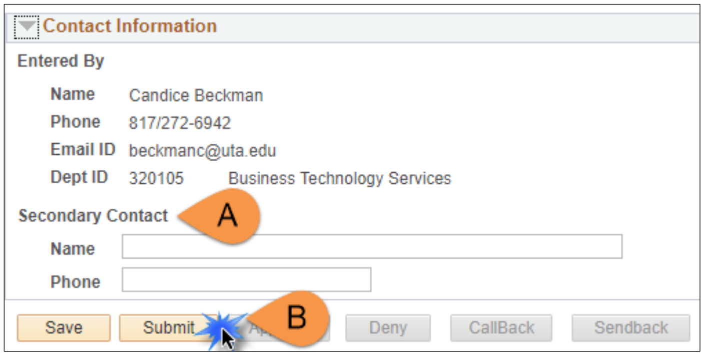
The **Form Procedures** section is used as a checklist and to provide additional information about the request. Review and provide answers to the questions in this section.



15) Add a Secondary Contact (if needed) and Submit the Form to Workflow

A. If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the New Position Request form.

B. After completing the eForm, click the **Submit** button to send the document for approval. The eForm **Status** changes to “Pending Approvals” and the current routing is displayed.


Contact Information
Entered By
Name
Candice Beckman
Phone
817/272-6942
Email ID
beckmanc@uta.edu
Dept ID
320105
Business Technology Services
Secondary Contact
A
Name
Phone
Save
Submit
B
Deny
CallBack
Sendback