

### 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

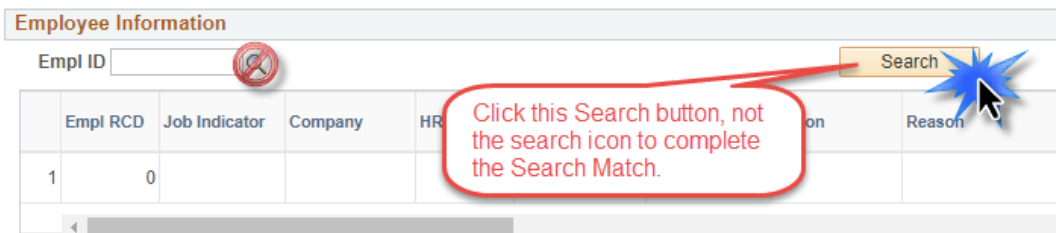
2) Click the Add a New Value tab.

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.

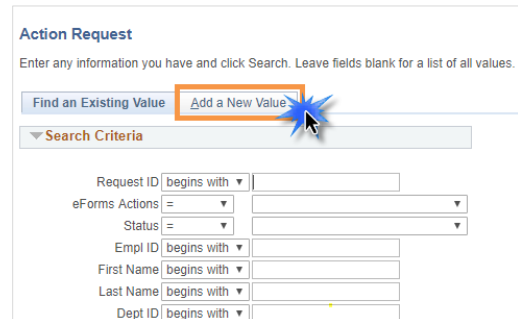


**Employee Information**

Empl ID

Empl RCD	Job Indicator	Company	HR	Reason
1	0			

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



**Action Request**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

▼ Search Criteria

Request ID begins with

eForms Actions =

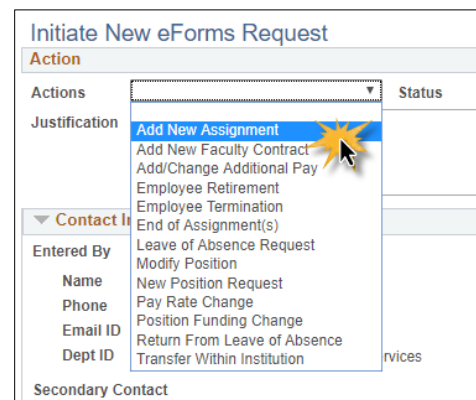
Status =

Empl ID begins with

First Name begins with

Last Name begins with

Dept ID begins with



**Initiate New eForms Request**

**Action**

Actions	Status
Justification	
▼ Contact Information	
Entered By	
Name	
Phone	
Email ID	
Dept ID	
Secondary Contact	

Justification dropdown options:  
 Add New Assignment  
 Add New Faculty Contract  
 Add/Change Additional Pay  
 Employee Retirement  
 Employee Termination  
 End of Assignment(s)  
 Leave of Absence Request  
 Modify Position  
 New Position Request  
 Pay Rate Change  
 Position Funding Change  
 Return From Leave of Absence  
 Transfer Within Institution

**Search Match**

First Name

Last Name

Empl ID

---

Find |  | First 1 of 1

Name and ID	Phone	Address	Source ID	Company	Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthDate	National ID
1												

\*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

**Employment Information**

\*Hire Type  \*Hire Reason

\*Start Date

Transfer From State Agency

\*Position  **Current and Future Incumbents**

Empl ID	Empl Rcd	Name	Position Entry Date
	0		

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

Hire Type	Hire Reason
Hire	<ul style="list-style-type: none"> <li>• <b>Add POI (Person of Interest)</b></li> <li>• <b>Direct Transfer: Other TX Higher Ed</b></li> <li>• <b>Direct Transfer: Other UT Institution</b></li> <li>• <b>Direct Transfer: TX State Agency</b></li> <li>• <b>Hire - used for additional appointments or new hires</b></li> <li>• <b>Return to Work Retiree</b></li> </ul>
Rehire	<ul style="list-style-type: none"> <li>• <b>Add POI (Person of Interest)</b></li> <li>• <b>Direct Transfer: Other TX Higher Ed</b></li> <li>• <b>Direct Transfer: Other UT Institution</b></li> <li>• <b>Direct Transfer: TX State Agency</b></li> <li>• <b>Rehire: Returning Retiree</b></li> <li>• <b>Rehire: Reverse Termination</b></li> <li>• <b>Rehire: Same Institution</b></li> </ul>

- 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:**

Proposed Job Information	
Comp Frqncy	Monthly
FTE	1.000000
*Annual Rate @100%	<input type="text"/>
Annual Rate @FTE	<input type="text"/>
Monthly Rate @FTE	<input type="text"/>

Proposed Job Information	
Comp Frqncy	Semi Monthly
FTE	0.025000
*Hourly Rate	<input type="text"/>

- 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:**

Proposed Job Information	
Comp Frqncy	Contract
FTE	0.200000
*9 Month Academic Rate @100%	<input type="text"/>
9 Month Academic Rate @FTE	<input type="text"/>
Monthly Rate @FTE	<input type="text"/>
Contract Information	
Contract Action	Create New Contract
*Pay Type	<input type="text"/>
*Payment Term	<input type="text"/>
*Contract Start Date	<input type="text"/> 31
*Contract End Date	<input type="text"/> 31
Payment End Date	<input type="text"/> 31
Contract Worth	<input type="text"/>

- 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.

Current Personal Information	Proposed Personal Information
First Name: Sam	*First Name: Sam
Middle:	Mid Name:
Last Name: Maverick	*Last Name: Maverick
Address 1: 123 Somewhere Blvd	*Address 1: 123 Somewhere Else Lane <a href="#">Clean Address</a>
Address 2:	Address 2:
City: Irving	*City: Arlington
State: TX	*State: TX
Zip: 76086-5325	*Zip: 76099
County: Tarrant	County: Tarrant
Country: USA	*Country: USA
Birth Date:	*Birth Date: 05/03/1988
SSN:	*SSN:
Gender:	*Gender: Female
Home Email:	Home Email: gomavs@gmail.com
Home Phone:	Home Phone: 8171234567
Business Phone:	Business Phone: 8172721234

### 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**.

**Clean Address**

Effective Date: 05/31/2019

Country: United States

Address 1: 123 Somewhere Else Lane

Address 2:

Address 3:

City: Arlington State: TX

Postal: 76019-0001

County: Tarrant

OK Cancel

Validate Address  
Clear

Override Address Verification

**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.

Current Position Information	Proposed Position Information
Effective Date: 01/16/2017	Effective Date: 01/16/2017
Business Unit: UTA22 Social Work	Business Unit: UTA22 Social Work
Department: 645000 Social Work	Department: 645000 Social Work
Job Code: 10035 ADJUNCT ASSISTANT PROFESSOR	Job Code: 10035 ADJUNCT ASSISTANT PROFESSOR
Job Title: ADJUNCT ASSISTANT PROFESSOR	Job Title: ADJUNCT ASSISTANT PROFESSOR
Reg/Temp: Regular	Reg/Temp: Regular
Full/Part Time: Part-Time	Full/Part Time: Part-Time
FLSA Status: Exempt	FLSA Status: Exempt
Empl Class: Non-Tenure Track Fac	Empl Class: Non-Tenure Track Facu
Sal Plan: UTA Faculty	Sal Plan: UTA Faculty
Proposed Salary: [ ]	Proposed Salary: [ ]
Acadm Rnk: [ ]	Acadm Rnk: [ ]
FTE: 0.200000	*FTE: 0.200000
Stnd Hrs/Wk: 8.00	Stnd Hrs/Wk: 8.00
Max Head Cnt: 1	Max Head Cnt: 1
Reports To Pos: 10012627	Reports To Pos: 10012627
Reports To Name: Debra Woody	Reports To Name: Debra Woody
Reports To Email: debwoody@uta.edu	Reports To Email: debwoody@uta.edu
Location Code: ARL	Location Code: ARL
Mail Drop ID: 19129	Mail Drop ID: 19129
<input type="checkbox"/> Budgeted Position	<input type="checkbox"/> Budgeted Position

### 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.*

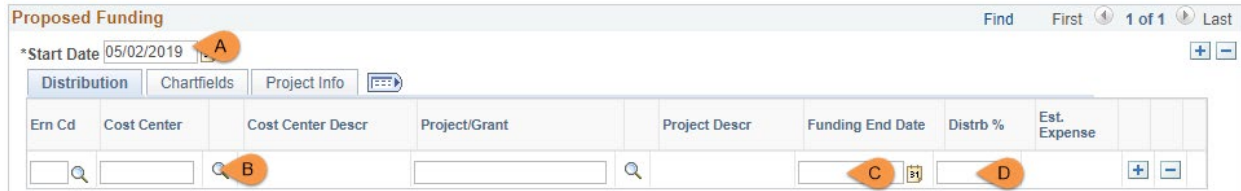
*If the position effective date (aka the date the position was created) was within the Fiscal Year (after September 1), the Start Date should reflect the date the position was initially made effective.*

*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.



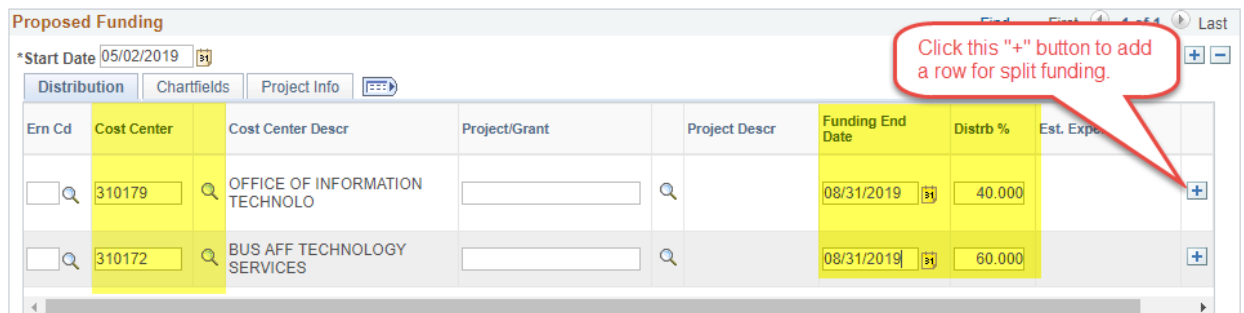
### 11a. Add additional or split funding

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.

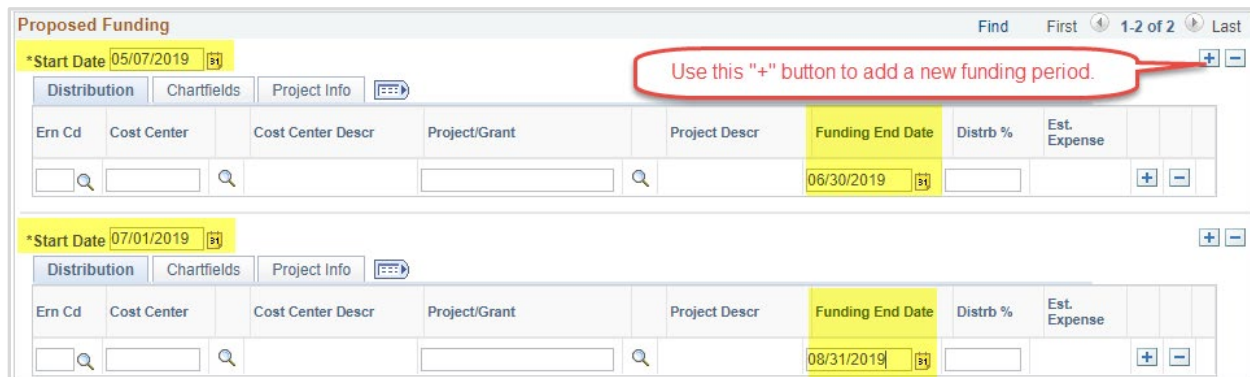
Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



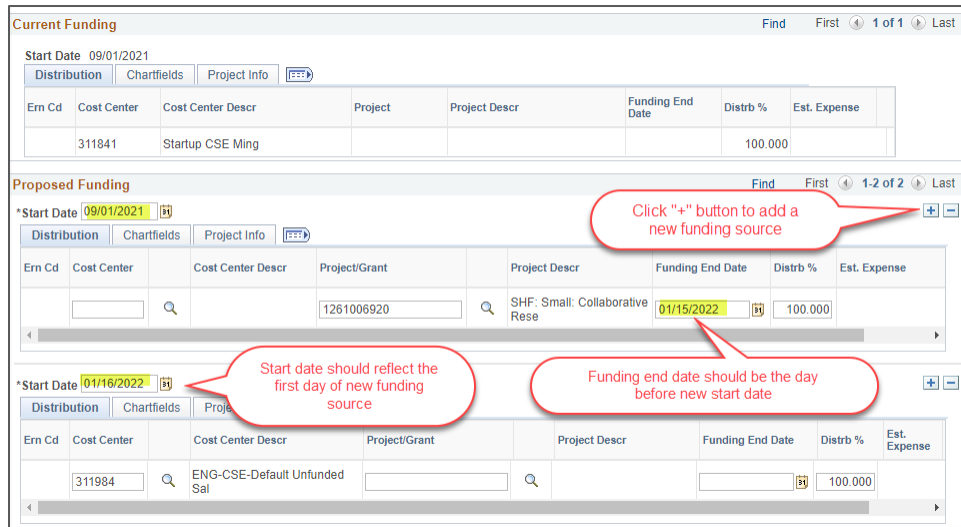
### 11c. Add a Funding Period

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.



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

Start Date 09/01/2021

Em Cd	Cost Center	Cost Center Descr	Project	Project Descr	Funding End Date	Distr %	Est. Expense
311841	Startup CSE Ming					100.000	

**Proposed Funding** Find First 1-2 of 2 Last

\*Start Date 09/01/2021

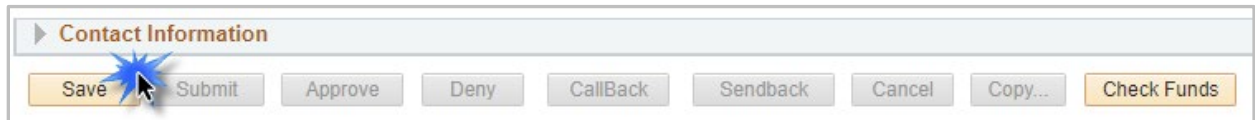
Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distr %	Est. Expense
			1261006920	SHF: Small: Collaborative Rese	01/15/2022	100.000	

\*Start Date 01/16/2022

Em Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distr %	Est. Expense
311984	ENG-CSE-Default Unfunded Sal					100.000	

### 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	8,181.82	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
	<b>Totals</b>		<b>3,743,803.27</b>	<b>0.00</b>	<b>-1,452,204.12</b>	<b>202,082.16</b>	<b>0.00</b>	<b>2,089,516.99</b>	<b>23,787.88</b>	<b>0.00</b>	<b>23,787.88</b>	<b>2,065,729.11</b>

OK Cancel



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

**Blue** = the current eForm request

**Pink** = other pending eForm requests

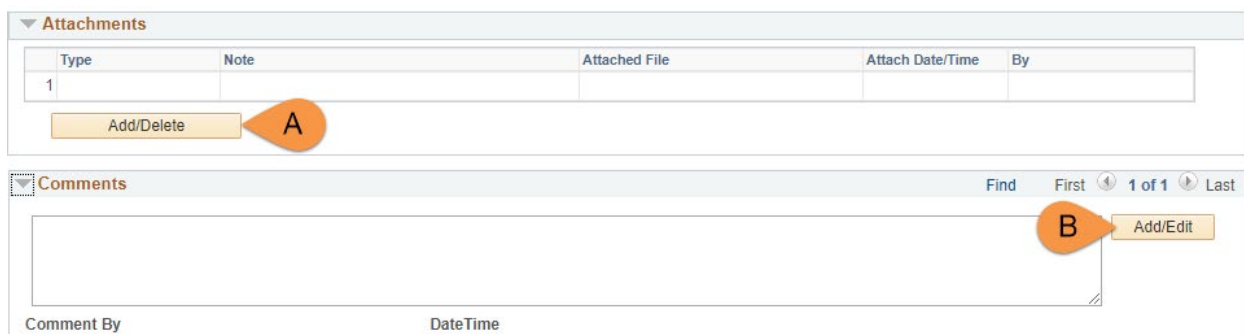
**Yellow** = the budgetary account line is overdrawn (e.g. A1200)

**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.



**Attachments**

Type	Note	Attached File	Attach Date/Time	By
1				

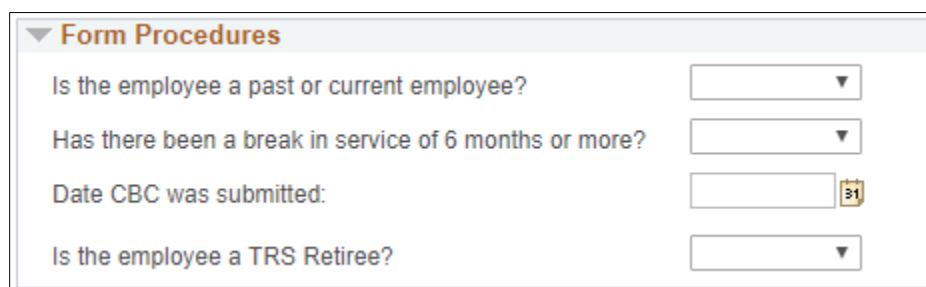
Add/Delete **A**

**Comments** Find First 1 of 1 Last **B** Add/Edit

Comment By DateTime

### 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.



**Form Procedures**

Is the employee a past or current employee?

Has there been a break in service of 6 months or more?

Date CBC was submitted:  31

Is the employee a TRS Retiree?

### 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**