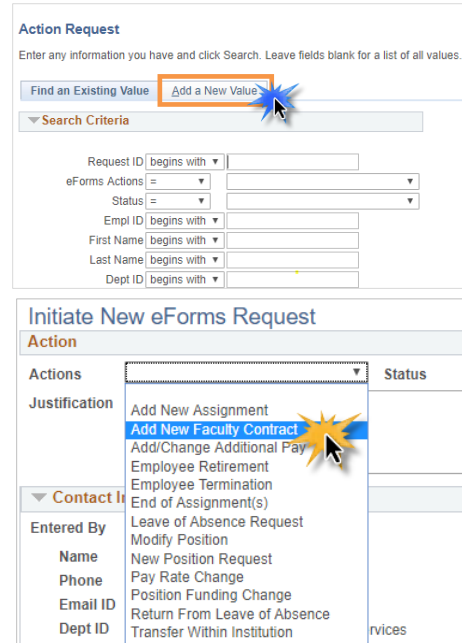


Add New Faculty Contract

The Add New Faculty Contract form is used to create a new contract or update an existing Faculty contract. Contracts are used to pay Faculty salary, or contracted amount, within a specified date range. This form will be used to reassign non-tenured Faculty. To create a new or update an existing contract, 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) The **Initiate New eForms Request** page is displayed. Select **Add New Faculty Contract** from the **Actions** drop-down menu.
- 4) Use the Justification text box to explain or justify the reason for the request.
- 5) Enter the Employee ID and Effective Date



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: 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

Contact II

Entered By: Name, Phone, Email ID, Dept ID

The **Employee Information** section is used to identify the incumbent receiving the new or updated contract.

- a. Enter or lookup the employees **Empl ID**. The table below displays all the existing assignments for the employee.
- b. If necessary, select the checkbox next to the Empl Record used for contract.
- c. Enter the **Effective Date**. This field will default with the current date. If desired, you may change the Effective Date to match the contract **Start Date**.

Select Emplid and Position Below

Employee Information

*Empl ID 1002543606 Dolan, Jane Show Current Additional Pay

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1 <input checked="" type="checkbox"/>		0 Primary	ARL	Active	Active	09/01/2019	Data Change	Contract	625101

*Effective Date

- 6) Complete the Proposed Job Information

If there is an existing Contract, the **Current Job Information** section is displayed. Use the **Proposed Job Information** section to enter or update contract information for the faculty member:

Current Job Information		Proposed Job Information	
Empl Class	Regular Faculty	Empl Class	Regular Faculty
Comp Frqncy	Contract	Comp Frqncy	Contract
FTE	1.000000	FTE	1.000000
9mo Academic Rate @100%	148581.000	*9mo Academic Rate @100%	160000.000
9mo Academic Rate @FTE	148581.000	9mo Academic Rate @FTE	160000.000
Monthly Rate @FTE	16509.000	Monthly Rate @FTE	17777.778
Contract Information		Contract Information	
Contract #	8	Contract Actn	Create New Contract
Pay Type	Faculty 9/9	Pay Type	Pay Over Contract
Payment Term	Pay over 'X' months	Payment Term	Pay Over 1.5 Months
Contract Start Date	09/01/2017	Contract Start Date	06/01/2018
Contract End Date	05/31/2018	Contract End Date	07/15/2018
Payment End Date	05/31/2018	Payment End Date	07/15/2018
Contract Worth	148581.000	Contract Worth	26666.667

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 "Create New Contract" from the **Contract Actn** drop down menu (The system will automatically assign the Contract number once the eForm is approved).
- 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 "Contract 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**.

7) 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

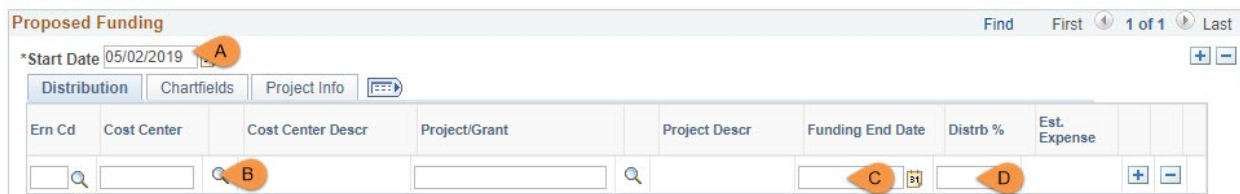
prior funding with Start Date September 1 and a Funding End Date of February 28, then an additional Funding Period row added, with Start Date March 1.

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.



The screenshot shows the 'Proposed Funding' form with the following fields highlighted:

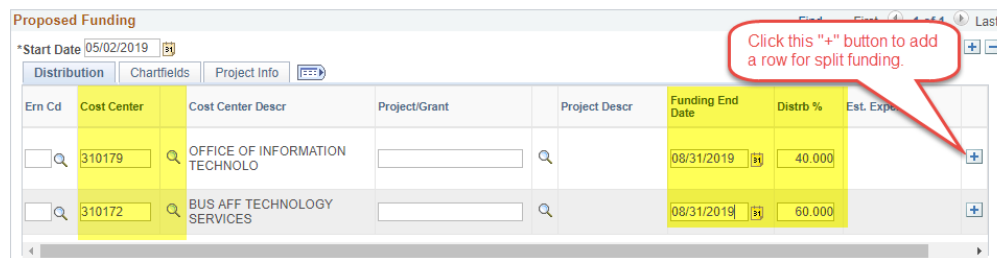
- A:** Start Date field containing '05/02/2019'.
- B:** Cost Center field.
- C:** Funding End Date field.
- D:** Distribution % field.

7a. 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.

7b. 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.



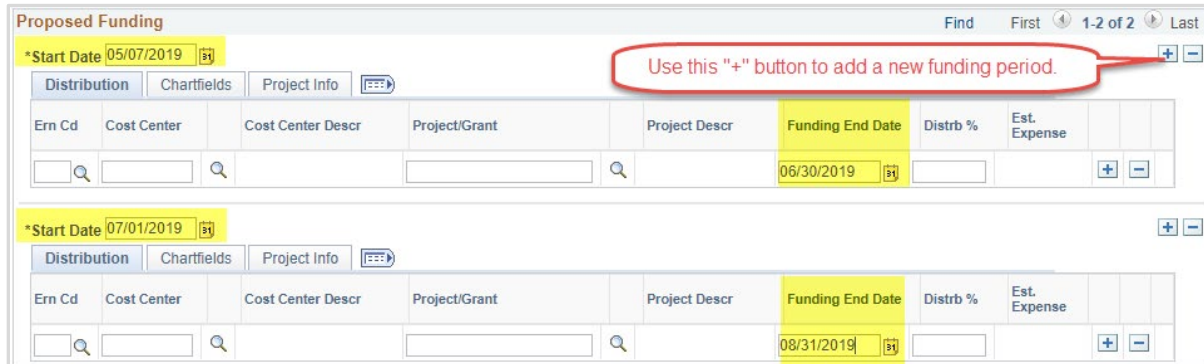
The screenshot shows the 'Proposed Funding' form with two rows of split funding. A red callout box points to the plus sign [+] button in the right column of the first row, with the text: "Click this '+' button to add a row for split funding."

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
	310179	OFFICE OF INFORMATION TECHNOLO			08/31/2019	40.000	
	310172	BUS AFF TECHNOLOGY SERVICES			08/31/2019	60.000	

7c. 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).



Proposed Funding Find First 1-2 of 2 Last

*Start Date 05/07/2019 [sj] +

Use this "+" button to add a new funding period.

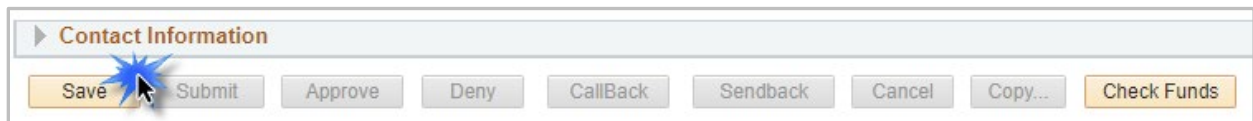
Err Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
					06/30/2019 [sj]		

*Start Date 07/01/2019 [sj] +

Err Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
					08/31/2019 [sj]		

8) 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.



Contact Information

Save Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds

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

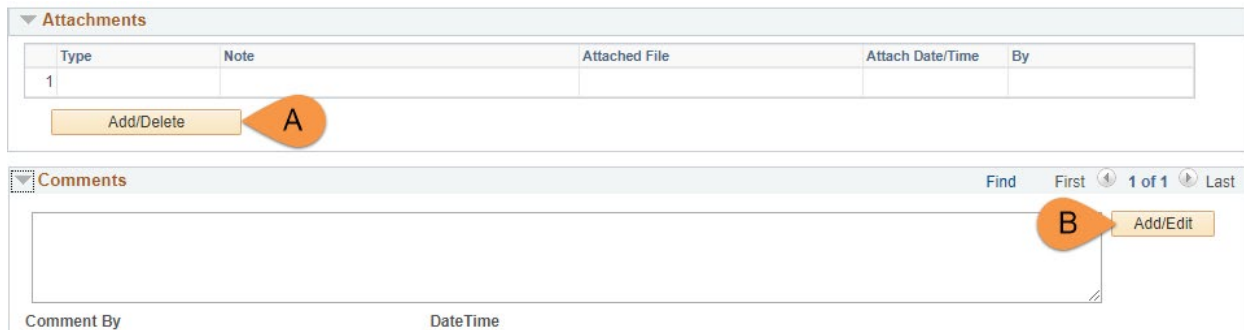
Yellow = the budgetary account line is overdrawn (e.g. A1200)

Red = overall budget is overdrawn

9) 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)

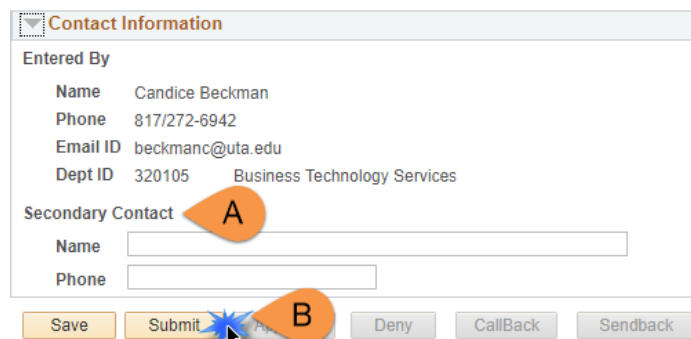
Note: Attachments and Comments cannot be added unless you have clicked Save.



The screenshot shows two sections: 'Attachments' and 'Comments'. In the 'Attachments' section, there is a table with columns: Type, Note, Attached File, Attach Date/Time, and By. Below the table is an 'Add/Delete' button, which is circled in orange with a callout 'A'. In the 'Comments' section, there is a large text input area. To the right of the input area is an 'Add/Edit' button, which is circled in orange with a callout 'B'. The 'Comments' section also includes a 'Find' field and navigation buttons for 'First', '1 of 1', and 'Last'. Below the input area, there are labels for 'Comment By' and 'DateTime'.

10) 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.



The screenshot shows the 'Contact Information' section. It includes a sub-section 'Entered By' with fields for Name (Candice Beckman), Phone (817/272-6942), Email ID (beckmanc@uta.edu), and Dept ID (320105 Business Technology Services). Below this is the 'Secondary Contact' section, which has input fields for Name and Phone. The 'Secondary Contact' label is circled in orange with a callout 'A'. At the bottom of the section are several buttons: 'Save', 'Submit', 'Deny', 'CallBack', and 'Sendback'. The 'Submit' button is circled in orange with a callout 'B' and a mouse cursor is pointing at it.