

Manage eForms Approvals

eForm is an electronic form solution that provides a secure and efficient way for processing various human resources, payroll and position funding transactions.

Workflow Overview

After a Requester submits an eForm for approval, Workflow begins. Workflow is an electronic routing and approval process for documents processed in UT Share. The forms are designed to route to pre-defined Approvers:

- The first approval level is the **Department Approval**, which may include the “Reports To” Manager or Department Head.
- The second approval level is **Funding Approval**. Depending on the funding source(s) used, the form will route to the Budget Authority for Cost Centers and/or to the Principal Investigator (PI) for Projects (Grants).
- The last approval level is **Business Office Approval**, which may include Budget Office, Provost, Grants & Contracts, Human Resources, Payroll, etc.

As the request passes through each Approval stage, the Approver is responsible for the following:

- Reviewing and verifying the information for accuracy.
- Approving the request to move the form forward to the next approval level or returning the request for revisions or denying (cancelling) the request completely.

Department Approvals

REQUEST_ID=00000780:Pending

All Forms But Funding Changes

Pending

Jane Dolan

New Position Reports To

Funding Approvals

REQUEST_ID=00000780:Awaiting Further Approvals

Funding Approval

Not Routed

Multiple Approvers

FMS Cost Center Approver

Funding Approval

Not Routed

Alyson Baker

Project Principal Investigator

Business Office Approvals

REQUEST_ID=00000780:Awaiting Further Approvals

APTs & XFRs

Not Routed

Barry Moorehouse

Budget Office

→

Not Routed

Multiple Approvers

HR Data Administrator

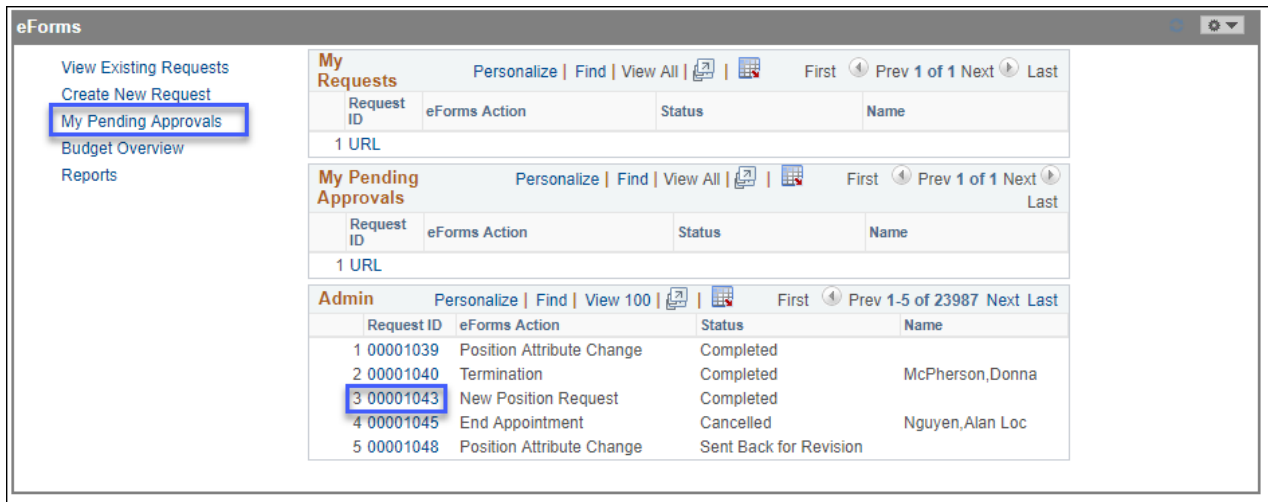
View eForms Awaiting Approval

Approvers will receive an email notification for documents pending approval. The document can be accessed using one of the following options:

Option 1 – eForms Pagelet

1. Log in to UT Share.
2. The eForms pagelet allows you to view all pending forms awaiting your approval (by clicking the *My Pending Approvals*) or a specific form (by clicking the *Request ID*).

Note: If the eForms pagelet is not appearing on the homepage, click the “Content” link to add the pagelet.

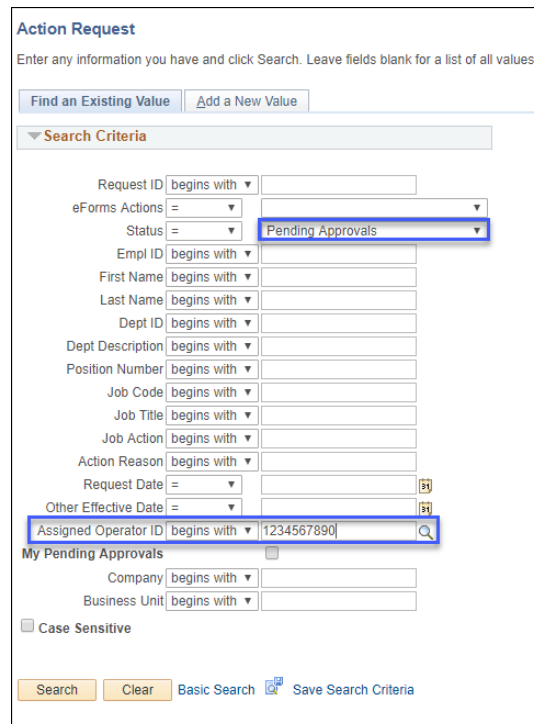


The screenshot shows the eForms interface with a sidebar on the left containing navigation links: View Existing Requests, Create New Request, My Pending Approvals (highlighted), Budget Overview, and Reports. The main content area is divided into three sections: My Requests, My Pending Approvals, and Admin. The Admin section contains a table of requests with the following data:

Request ID	eForms Action	Status	Name
1 00001039	Position Attribute Change	Completed	
2 00001040	Termination	Completed	McPherson, Donna
3 00001043	New Position Request	Completed	
4 00001045	End Appointment	Cancelled	Nguyen, Alan Loc
5 00001048	Position Attribute Change	Sent Back for Revision	

Option 2 – My Pending Approvals

1. Log in to UT Share.
2. Begin navigating to the Navigator > HRMS > UTZ Customizations > eForms HR/Payroll Actions > My Pending Approvals
3. The eForms **Action Request** page is displayed. Select “Pending Approvals” from the **Status** field.
4. The **Assigned Operator ID** defaults with your Empl ID. Click **Search**.
5. If applicable, forms pending your approval are displayed in the **Search Results** table. Select the form you want to approve from the table. The eForm request page is displayed.



The screenshot shows the Action Request search form with the following fields and values:

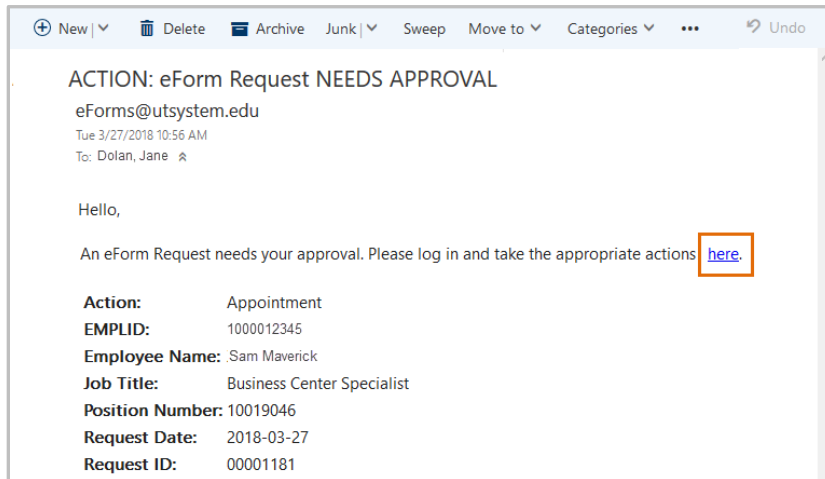
- Request ID: begins with []
- eForms Actions: = []
- Status: = Pending Approvals
- Empl ID: begins with []
- First Name: begins with []
- Last Name: begins with []
- Dept ID: begins with []
- Dept Description: begins with []
- Position Number: begins with []
- Job Code: begins with []
- Job Title: begins with []
- Job Action: begins with []
- Action Reason: begins with []
- Request Date: = []
- Other Effective Date: = []
- Assigned Operator ID: begins with [1234567890]
- My Pending Approvals: []
- Company: begins with []
- Business Unit: begins with []
- Case Sensitive: []

Buttons at the bottom: Search, Clear, Basic Search, Save Search Criteria

Option 3 – Email Notification (not recommended)

1. When the Requester submits the eForm for approval, each approver will receive an email notification. Select the link provided in the email message.

Note: Some users experience issues connecting to the workflow form using the email link.

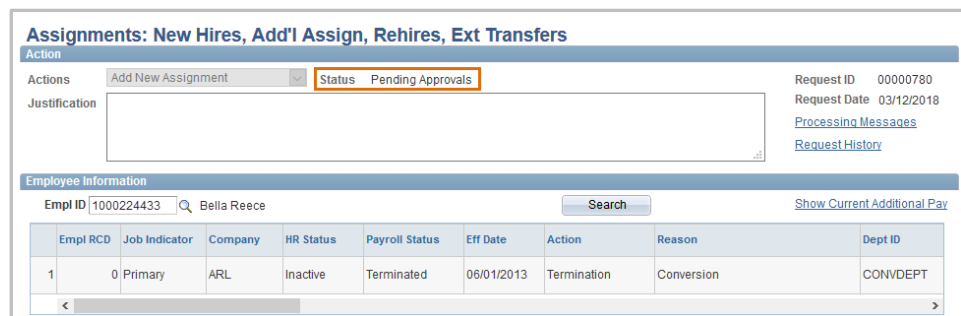


2. If logged in to UT Share, you will be directed to the eForm request page. If not, you will be prompted to provide your login credentials and then the eForm request page is displayed.

Take Action on eForm

1. Once the eForm page is displayed, review the details provided on the request for accuracy (e.g. Proposed

Position Information, Proposed Job Information, Proposed Funding, etc.).

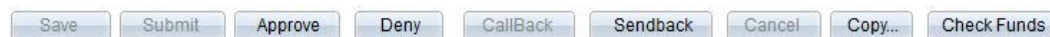


Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1	0 Primary	ARL	Inactive	Terminated	06/01/2013	Termination	Conversion	CONVDEPT

If applicable,

expand the attachments and comments section to view additional information provided.

2. After reviewing the form, select one of the following options:

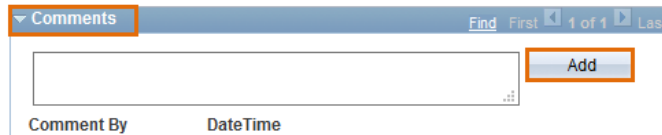


- **Approve** – the form is approved and routed to the next approver.
- **Deny** – cancels the request completely and no further action can be taken. The approver must provide an explanation in the **Comments** section explaining why the document was denied.
- **Send Back** – the form is returned to the requester. The approver must provide an

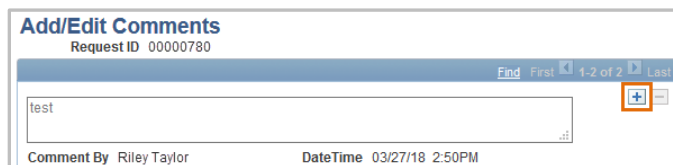
explanation in the **Comments** section explaining why the document was returned.

Add Comments to eForm

- a. If necessary, expand the **Comments** section.
- b. Click **Add**.
- c. Enter your remarks and then click **OK**.



Note: If there are existing **Comments** click the plus sign [+] to insert a new row and then begin typing.



View an Existing eForm

1. Begin navigating to the Main Menu > HRMS > UTZ Customizations > eForms HR/Payroll Actions > Action Request.
2. The **eForms Action Request** page is displayed. Use the **Find an Existing Value** tab to search for an existing form. You may perform a search by:
 - **Request ID:** use this option to search by the 8-digit reference number assigned when the form was saved or submitted.
 - **eForms Actions:** use this option to search for a specific eForm type (Appointment, Additional Pay, New Position, Pay Rate Changes, etc.)
 - **Status:** use this option to search for forms with a specific status (Approved, Pending Approvals, Denied, etc.).
 - **Empl ID or Name:** use this option to perform a search by the 10-digit employee ID or Name (person the action is for)
 - **Department:** use this option to display all eForms for a specific department.
 - **Position Number, Job Code, Job Title or Job Action:** use this option to perform a search with the position number or job information used on the request.
 - **Effective Date:** use this option to perform a search by the effective date on the request (e.g.



hire date, etc.)

After entering your search criteria, click **Search**.