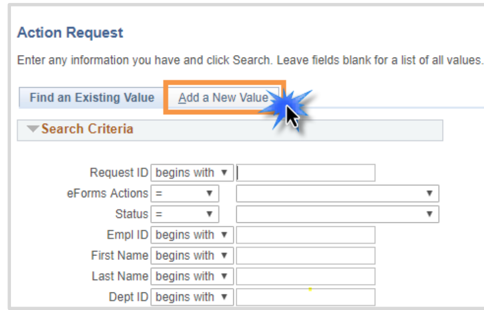
New Position Request

The New Position Request form is used to create a new position for your department. To process a new position request, complete the following steps:

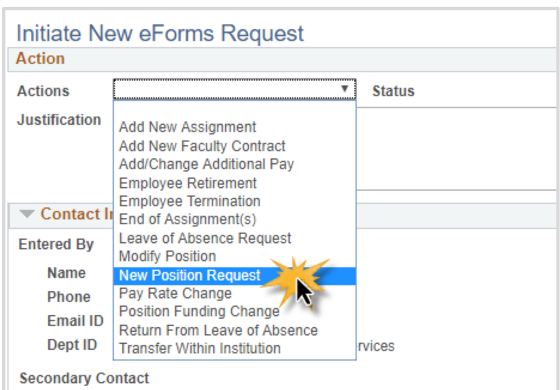
1) In UT Share, navigate to the Action Request page.

   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 **New Position Request** from the **Actions** drop-down menu.



4) **Complete the Action section**

   Enter the following fields:

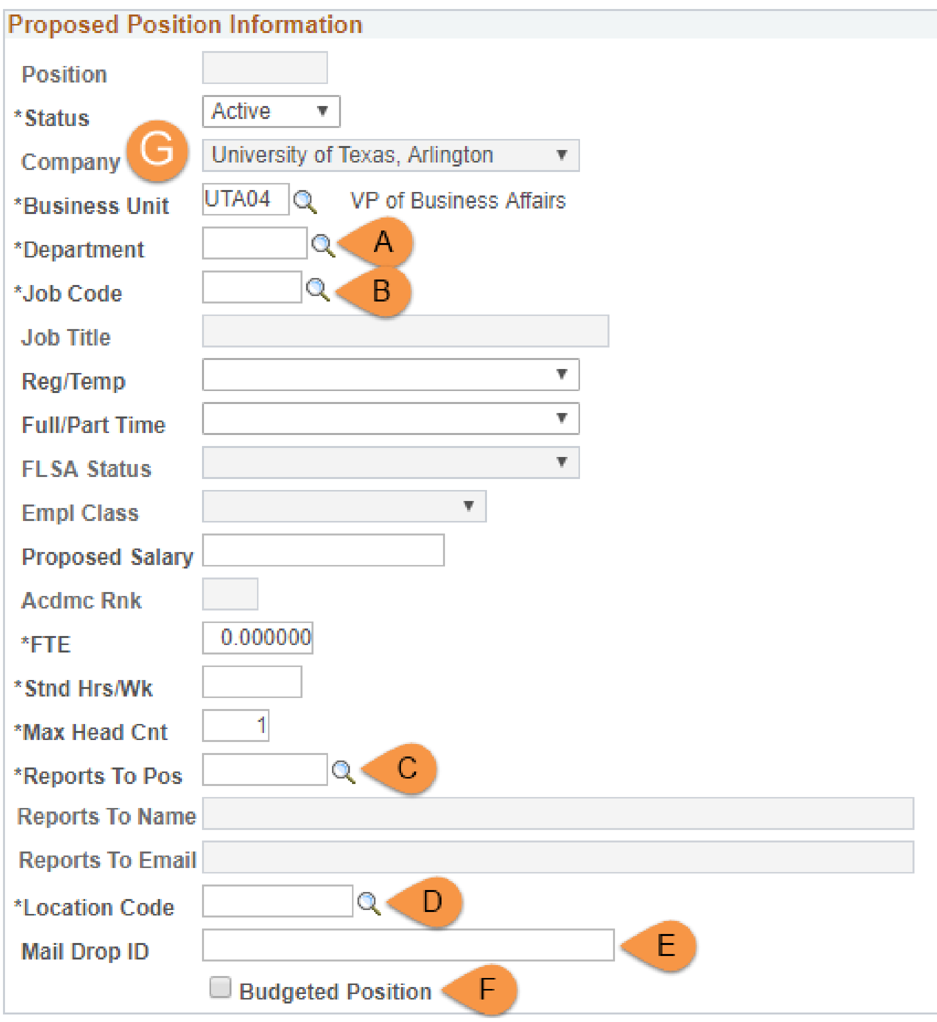
   A. Justification
   B. Position Effective Date
   C. If desired, you may use the **Copy Position** field to enter or lookup an existing Position number to copy the details (position attributes) to your new request (i.e. Department, Job

Code/Title, Standard Hours, FTE, etc.).

5) The **Proposed Position Information** section is used to enter the key attributes for the position. If the **Copy Position** feature was used, tab to the appropriate fields and make the necessary changes. Otherwise, you must complete all the required fields in this section.

Enter the following position attributes:

A. Department
B. Job Code
   Once the Job Code is entered, several position attributes will auto populate.
C. Reports to Position
   Once the Report to Pos is entered, the “Reports To Name” and “Reports To Email” will auto populate (if the Reports to position is filled).
D. Location Code
E. Mailbox Drop ID (campus P.O. Box number)
F. Select the checkbox if this is a Budgeted Position.
G. If necessary, update the Business Unit and Status.



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

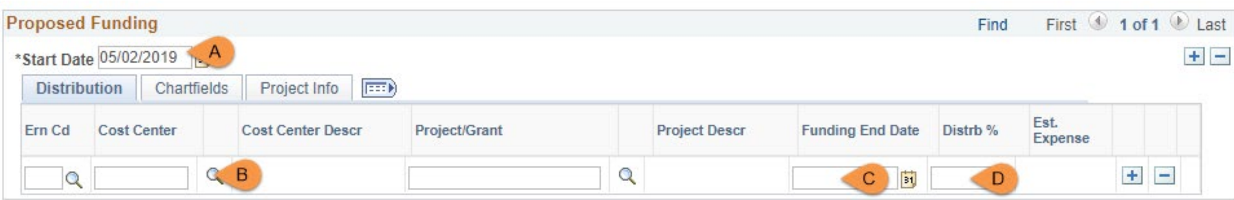
      Enter the Cost Center, Cost Share or Project/Grant funding the position, click the magnifying glass and confirm the account number.

   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

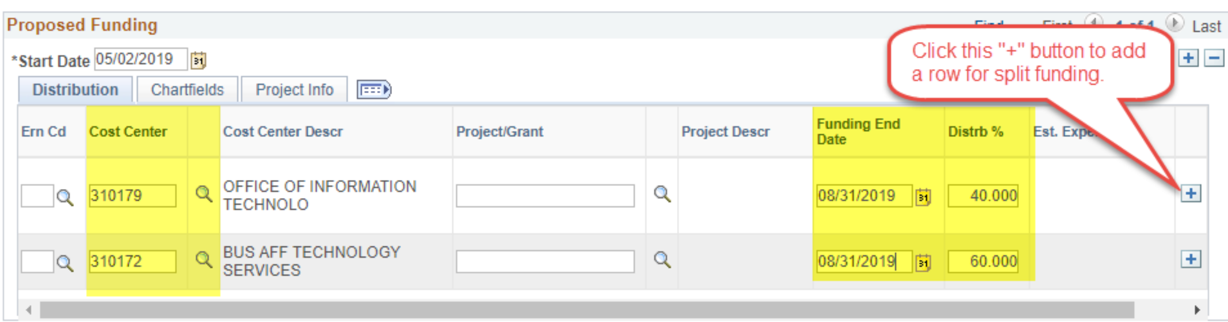
      Enter the funding Distribution %. Funding may be split between different Cost Centers, Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus [+] or minus sign [-] to add/remove an additional funding source.



6a. 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.

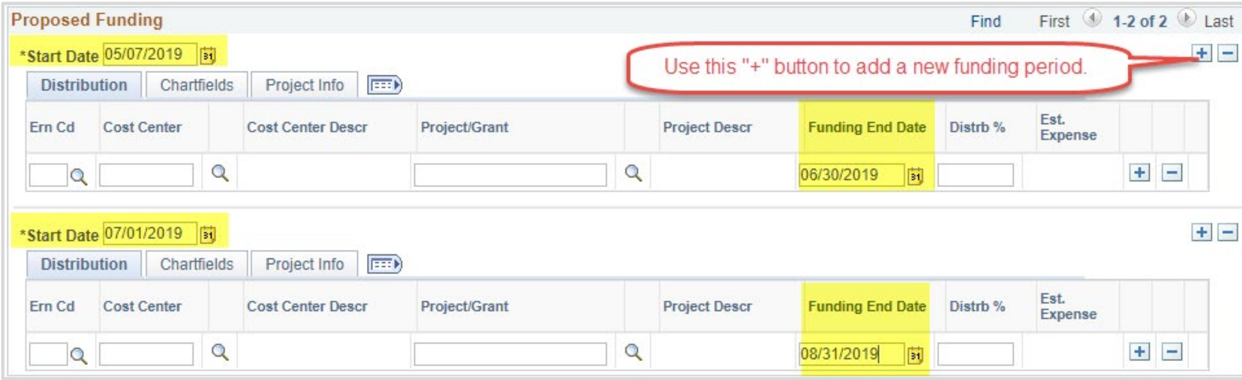
Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



6b. Add a Funding Period

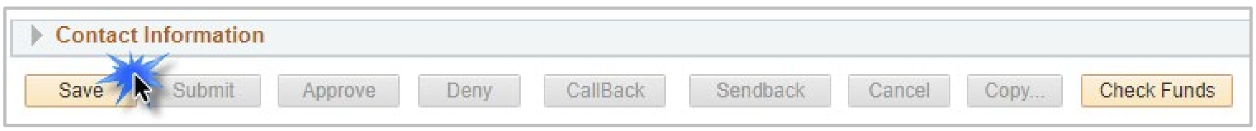
To enter funding with a different, **Start Date**, click the plus sign [+] in the upper-right corner of the **Proposed Funding** section to insert a new row.

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



7) Click Save and Review Available Funds

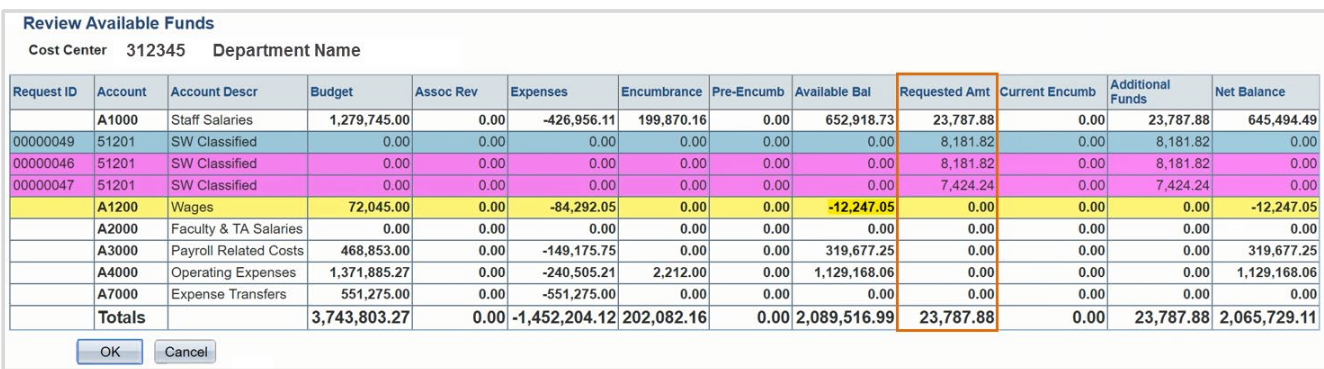
Once the required fields (indicated with an *asterisk) are completed, click **Save**. Once the form is saved, a **Request ID** number (e.g. 00002476) is assigned and the form status is displaying "Saved" at the top of the form.



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)

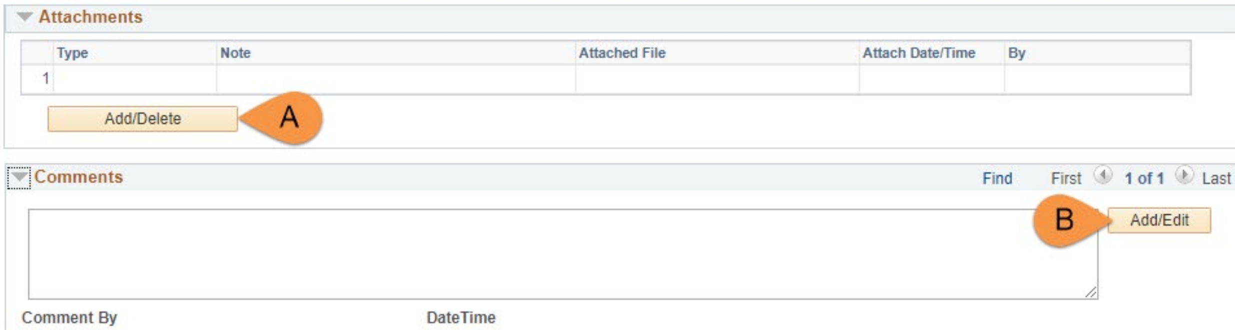
Red = overall budget is overdrawn

8) 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.



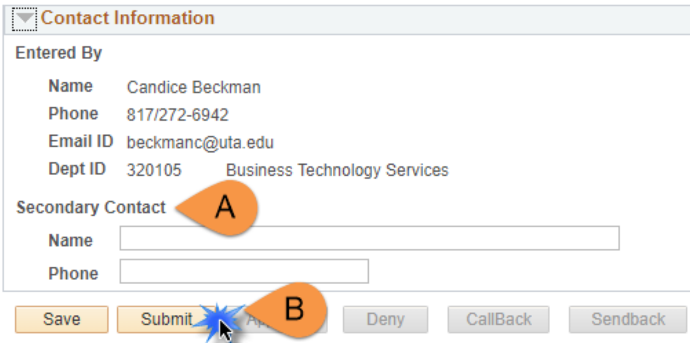
9) Complete the Form Procedures Section

   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.

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.


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