



UNIVERSITY OF
TEXAS
ARLINGTON

KNOWLEDGE
SERVICES

Position and Workforce Management

Agenda



Overview

Review Position and Job
Data

eForms

Reports and Queries

Position & Workforce Management Overview

Position & Workforce Mgmt Overview

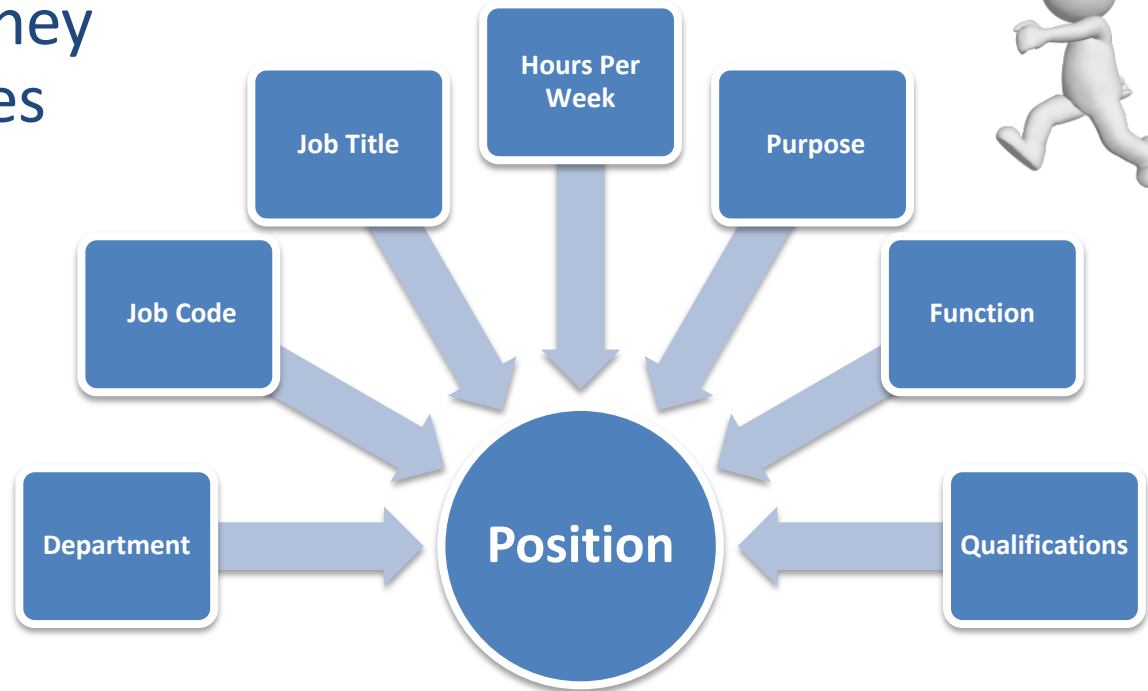
The HCM (Human Capital Management) module in UT Share is used to manage positions and employee data.

Positions are identified through a unique eight-digit Position ID.

An Incumbent is an individual who currently holds the position.

Position & Workforce Mgmt Overview

When an incumbent is hired (appointed) they inherit the attributes of the position.



When the incumbent leaves the position, the attributes are retained.

Position & Workforce Mgmt Overview

When a UTA employee transfers from one UTA position into a different UTA position, it is **important that the sending department does not create an e-form to terminate the employee** since it creates a situation where the employee is separated from UTA in UTShare.

Receiving department should use the Transfer Within Institution eForm to transfer the employee from one position into another.

Position & Workforce Mgmt Overview

Transfer Scenario:

Thelma works in the College of Education as a Coordinator III. She was recently hired by the College of Science as an Assistant Director. She gave two weeks notice to her current supervisor Suzie Sending. Her last day in the College of Education is 11/30. She starts her new job working for Raquel Receiving on 12/01.

Action to Take:

Raquel's Administrative Assistant (new position) initiates an e-form with Action: Transfer Within Institution and Effective Date 12/01.



Position & Workforce Mgmt Overview

Types of positions at UTA:

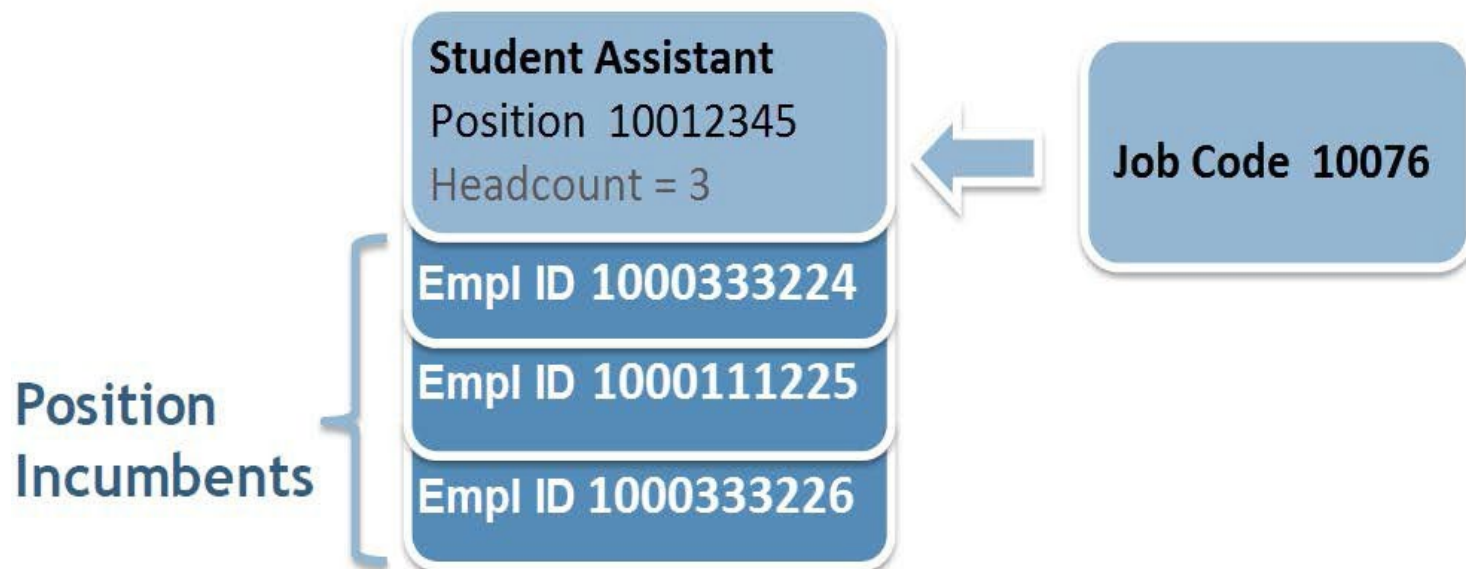
- Classified
- Administrative and Professional
- Faculty
- Graduate Student
- Undergraduate Student
- Persons of Interest - Job Codes for POIs usually starts with an “A”. Listed below are examples:

Job Code	Description	Job Code	Description	Job Code	Description
A002	Adjunct/Clinical Affiliate	A004	Payroll Contractor	A007	Visiting Student
A003	Independent Contractor	A006	Visiting Researcher	A009	Other University Affiliate

Position & Workforce Mgmt Overview

Pooled Positions

A position created for an Undergraduate Student, Casual Employee, or Person of Interest can have multiple incumbents. This type of position is called a "Pooled Position".



Position & Workforce Mgmt Overview

Pooled Positions

Incumbents in a Pooled Position must share the following attributes:

- Job code
- Pay Type
- Funding Source
- Hours per week
- Reports To



Position & Workforce Mgmt Overview

Recruiting Tools at UTA

PeopleAdmin: is used to recruit and hire staff, faculty and administrators.

Handshake: is a career center platform for on-campus (e.g. Tutors, Student Assistant, etc.) as well as off-campus job/internship postings.



Position & Workforce Mgmt Overview

Recruiting Assistance at UTA

Faculty: Contact Academic Talent and Culture for all hiring and search needs related to faculty:
AcademicHR@uta.edu

Staff: Contact TCI Talent Acquisition for all hiring and search needs related to staff:
employment@uta.edu



Review Position & Job Data

Review Position and Job Data

Job Data

The Job Data page is used to view position information for an incumbent.

Work Location | Job Information | Job Labor | Compensation

Sam Maverick
Employee

Empl ID 1000067890
Empl Record 0

Work Location Details ? 1 of 2 Go To Row

Effective Date	11/15/2018	Action	Position Change
Effective Sequence	1	Reason	Position Reports To Change
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		Current <input type="checkbox"/>

Position Number 10085582 Business Support Analyst I
Override Position Data

Position Entry Date 09/27/2017
 Position Management Record

Regulatory Region	USA	United States
Company	ARL	University of Texas, Arlington
Business Unit	UTA04	VP of Business Affairs
Department	320105	Business Technology Services

Department Entry Date 09/27/2017

Location	ARL	ARLINGTON
Establishment ID	ARL	UT Arlington

Date Created 11/15/2018

Last Start Date 12/16/2008
Expected Job End Date End Job Automatically

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save Return to Search Notify Refresh Update/Display Include History

Review Position and Job Data

Job Summary

Displays job history for an incumbent.

NavBar > Menu > HRMS >
 UTZ Customizations >
 Human Resources > Job
 Summary

Job Summary

Nita Alexander EMP Empl ID 1000309766

Personalize Find First 1-3 of 3 Last

General	Job Information	Work Location	Salary Plan	Compensation	Distribution	Contract				
Org Relation	Empl Record	Effective Date	Seq	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
EMP		0 11/15/2018	1	19205	Salaried	Active	Full-Time	Regular	40.00	Weekly
EMP		0 11/15/2018	0	19205	Salaried	Active	Full-Time	Regular	40.00	Weekly

General	Job Information	Work Location	Salary Plan	Compensation	Distribution	Contract			
Org Relation	Empl Record	Effective Date	Seq	Position	Description	Company	Department	Location	Reports To
EMP		0 11/15/2018	1	10085582	Business Support Analyst I	ARL	BATS	ARLINGTON	10089419
EMP		0 11/15/2018	0	10085582	Business Support Analyst I	ARL	BATS	ARLINGTON	10089419

General	Job Information	Work Location	Salary Plan	Compensation	Distribution	Contract			
Org Relation	Empl Record	Effective Date	Seq	Annual Rate	Monthly Rate	Daily Rate	Hourly Rate	Currency	Change Percent
EMP		0 11/15/2018	1	53200.000		204.615	25.576923	USD	
EMP		0 11/15/2018	0	53200.000		204.615	25.576923	USD	

General	Job Information	Work Location	Salary Plan	Compensation	Distribution	Contract								
Org Relation	Empl Record	Effective Date	Seq	Fiscal Year	Earnings Code	Project	PC Business Unit	Department	Cost Center	Position Number	Combination Code	Percent of Distribution	Begin Date	End Date
EMP		0 11/15/2018	1	2019				320105	310172	10085582	100146528	100.000	09/01/2018	09/31/2019
EMP		0 11/15/2018	0	2019				320105	310172	10085582	100146528	100.000	09/01/2018	09/31/2019

Review Position and Job Data

Position Information

This page is used to track position related data.

Description	Specific Information	Budget and Incumbents	HR Data
Position Information			
Position Number	10083946	Current Head Count	1 out of 1
Headcount Status	Filled	Status	Active
Effective Date	04/01/2016	Reason	NEW
Position Status	Approved	New Position	Action Date 04/27/2016
		Status Date	04/01/2016
			<input type="checkbox"/> Key Position
Job Information			
Business Unit	UTA20	College of Nursing	
Job Code	10551	POST DOCTORAL RESEARCH ASSOCIA	
Reg/Temp	Regular	Full/Part Time	Full-Time
Regular Shift	Not Applicable	Union Code	
Title	POST DOCTORAL RESEARCH ASSOCIA	Short Title	P Doc Assc Detailed Position Description
Work Location			
Reg Region	USA	United States	
Department	635000	Nursing	Company ARL University of Texas, Arlington
Location	ARL	ARLINGTON	
Reports To	10079905	PROFESSOR	Dot-Line
Supervisor Lvl			Security Clearance
Salary Plan Information			
Salary Admin Plan	A&P	Grade	Step
Standard Hours	40.00	Work Period	W Weekly
Mon	Tue	Wed	Thu
	8.00	8.00	8.00
		Fri	Sat
		8.00	8.00
			Sun

NavBar > Menu > HRMS > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

Review Position and Job Data

Department Budget Table

These pages are used to view position funding information.

Dept Budget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budget Deductions	>
Set ID	UTARL	Department	635000	Nursing
Fiscal Year	2019			
Budget Begin Date	09/01/2018	Budget End Date	08/31/2019	
Offset Group	UTSHR	Payroll Offset Accounts		
Budget Cap				
<input checked="" type="radio"/> Per Budget Level <input type="radio"/> Per Earn/Tax/Ded				
Suspense Combination Code <input type="text"/> <input type="button" value="Q"/> <input type="button" value="⏪"/> <input type="button" value="⏩"/> 1 of 1 <input type="button" value="View All"/>				
Effective Date	09/01/2018	Effective Sequence	0	
Combination Code	100149578	HCM Integration	ChartField Details	
Balance	0.00			
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Previous in List"/>	<input type="button" value="Next in List"/>	<input type="button" value="Notify"/>
			<input type="button" value="Update/Display"/>	<input type="button" value="Include History"/>

NavBar > Menu > HRMS > UTZ Customizations > Manager Self Service > Position Management Center > Department Budget Table USA

Review Position & Job Data

Class Activity

- View Job Data
- View Job Summary
- View Position Information
- View Department Budget Table (DBT)



Processing eForms

Processing eForms

eForm is an electronic form used to process various human resources, payroll and position funding transactions. Listed below are the different types of eForms:

New Appt Forms

- Add New Assignment
- Add New Faculty Contract
- New Position Request

Change Forms

- Add Additional Pay
- Modify Position
- Pay Rate Change
- Position Funding Change
- Transfer Within Institution

End Forms

- Employee Retirement
- Employee Termination
- End Assignment

LOA Forms

- Leave of Absence Request
- Return Employee From Leave

Processing eForms

Use the **Action Request** page to find an existing eForm or to create a new form.

Action Request

Enter any information you have and click Search. Leave fields blank to search for 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 []
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 = [] [B1]
Other Effective Date = [] [B1]
Assigned Operator ID begins with [] [Q]

My Pending Approvals

Company begins with []
Business Unit begins with []

Case Sensitive

Initiate New eForms Request

Action

Actions [] **Status** []

Justification []

Contact Information

Entered By

Name []
Phone []
Email ID []
Dept ID []

Secondary Contact

Name []
Phone []

Request ID []
Request Date []
[Processing Messages](#)
[Request History](#)

[Basic Search](#)

The Find an Existing Value tab is used to view an existing saved or submitted eForm request.

The Add a New Value tab is used to create a new eForm request

Click the Actions drop-down menu and select the appropriate request form to get started.

eForms Workflow

Workflow is an electronic routing and approval process.

It enables transactions that are initiated by the eForm Requester, to route through the system to pre-defined Approvers.

Approvers are responsible for reviewing and verifying the information in the form for accuracy.



eForms Workflow

Workflow Approvers for eForms:

Department Approver



“Reports To”
Manager listed on
the position

Funding Approver



Approval is required
from the **Cost
Center** and/or
Project (Grant)
budgetary authority

Business Office Approver



Depending on the
eForm, approval is
required from
Budgets, Provost,
Grants & Contracts,
Human Resources,
and/or Payroll

eForms Workflow

It is highly recommended that at least two or more individuals are designated at department funding approval to avoid delays in routing.

If an individual is assigned to two different approval levels (e.g. “Reports To” Manager and Funding Approver), the document will auto approve at the next stage.

eForm Requester should not process an eForm if listed as the “Reports To” Manager on a position.

eForms Workflow

Documents with multiple funding sources will route simultaneously for funding approval.

Each budgetary authority must approve the form before it will move to the next stage.

If one portion of funding is denied, the entire document will be returned to the Requester.

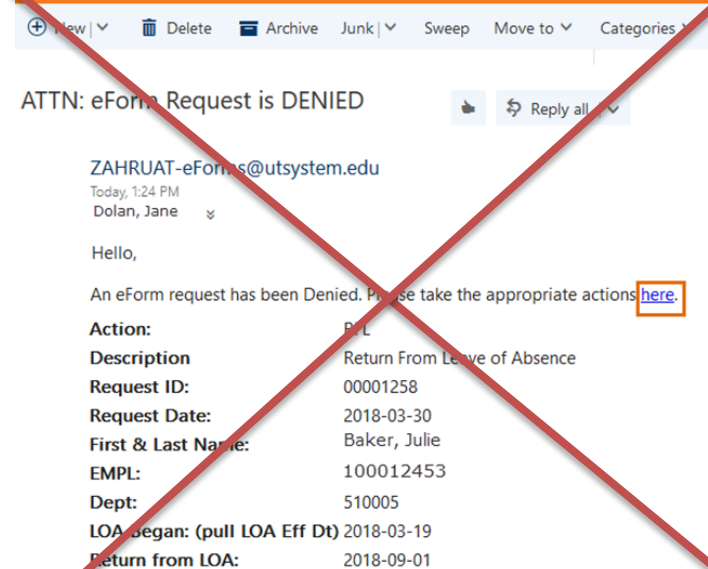


Workflow Notifications

Requesters will receive an email notification when the form has been Sent Back (Returned), Denied (Canceled) or Approved. Approvers will receive an email notification when an eForm has been submitted for approval.

The form can be accessed using one of the following options:

- 1: eForms pagelet
- 2: Action Request page
- 3: Email Message Link
(not recommended)



eForms Action Buttons

Requesters Action Buttons:

- Save
- Submit
- Callback
- Cancel
- Copy

The screenshot displays the 'Request Salary Change' form interface. At the top, the title 'Request Salary Change' is visible. Below it, there is an 'Action' section with a dropdown menu set to 'Pay Rate Change' and a 'Status' field. A large text area for '*Justification' is present. To the right, there are links for 'Request ID', 'Request Date', 'Processing Messages', and 'Request History'. Below the justification area, there are expandable sections for 'Employee Information', 'Attachments', 'Comments', and 'Contact Information'. At the bottom of the form, a row of buttons is displayed: 'Save', 'Submit', 'Approve', 'Deny', 'Callback', 'Sendback', 'Cancel', 'Copy', and 'Check Funds'. The 'Save', 'Submit', 'Callback', and 'Copy' buttons are highlighted with red borders, corresponding to the list of action buttons mentioned in the text above.

eForms Action Buttons

Approvers Action Buttons:

- **Approve**
- **Deny**
- **Send Back**

Request Salary Change

Action

Actions Status

*Justification

Request ID 00000780
Request Date 03/12/2019
[Processing Messages](#)
[Request History](#)

Employee Information

▶ **Attachments**

▶ **Comments**

▶ **Contact Information**

eForms Action Buttons

Check Funds Action button:

- This button is available to Requesters and Approvers.
- It's used to check the availability of funds for the Cost Center/Project being used for the eForm expense.

The screenshot displays the 'Request Salary Change' form. At the top, the title 'Request Salary Change' is shown. Below it, the 'Action' section contains a dropdown menu set to 'Pay Rate Change' and a 'Status' field. A large text area for '*Justification' is present. On the right side, there are links for 'Request ID', 'Request Date', 'Processing Messages', and 'Request History'. The form is divided into sections: 'Employee Information', 'Attachments', 'Comments', and 'Contact Information'. At the bottom, a row of buttons includes 'Save', 'Submit', 'Approve', 'Deny', 'Callback', 'Sendback', 'Cancel', 'Copy', and 'Check Funds'. The 'Check Funds' button is highlighted with a red border.

eForms Action Buttons

Check Funds Action button:

After clicking the **Check Funds** button, the **Review Available Funds** page displays the current condition of your budget.

Review Available Funds

Cost Center 359274

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	53,194.00	0.00	-57,847.40	20,387.83	0.00	-25,041.23	2,737.93	3,422.42	-684.49	-24,356.74
00051758	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	2,737.93	3,422.42	-684.49	0.00
	A1200	Wages	0.00	0.00	-43,256.04	21,060.00	0.00	-64,316.04	0.00	0.00	0.00	-64,316.04
	A2000	Faculty & TA Salaries	1,829,660.00	0.00	-1,229,433.45	603,266.02	0.00	-3,039.47	17,415.46	0.00	17,415.46	-20,454.93
00034218	50205	SW Non Tenure Track	0.00	0.00	0.00	0.00	0.00	0.00	17,415.46	0.00	17,415.46	0.00
	A2100	GTA Salaries	66,880.00	0.00	-4,741.04	2,340.00	0.00	59,798.96	0.00	0.00	0.00	59,798.96
	A3000	Payroll Related Costs	264,245.97	0.00	-264,106.79	139.18	0.00	0.00	0.00	0.00	0.00	0.00
	A7000	Expense Transfers	59,248.00	0.00	-59,248.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		2,273,227.97	0.00	-1,658,632.72	647,193.03	0.00	-32,597.78	20,153.39	3,422.42	16,730.97	-49,328.75

OK Cancel

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

eForms Action Buttons

Check Funds Action button:

The **Requested Amount** column displays the estimated expense for the current request and any other pending requests on the same funding source.

Currently, the **Check Funds** button is not a hard stop for the eForm request.

Review Available Funds

Cost Center 359274

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	53,194.00	0.00	-57,847.40	20,387.83	0.00	-25,041.23	2,737.93	3,422.42	-684.49	-24,356.74
00051758	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	2,737.93	3,422.42	-684.49	0.00
	A1200	Wages	0.00	0.00	-43,256.04	21,060.00	0.00	-64,316.04	0.00	0.00	0.00	-64,316.04
	A2000	Faculty & TA Salaries	1,829,660.00	0.00	-1,229,433.45	603,266.02	0.00	-3,039.47	17,415.46	0.00	17,415.46	-20,454.93
00034218	50205	SW Non Tenure Track	0.00	0.00	0.00	0.00	0.00	0.00	17,415.46	0.00	17,415.46	0.00
	A2100	GTA Salaries	66,880.00	0.00	-4,741.04	2,340.00	0.00	59,798.96	0.00	0.00	0.00	59,798.96
	A3000	Payroll Related Costs	264,245.97	0.00	-264,106.79	139.18	0.00	0.00	0.00	0.00	0.00	0.00
	A7000	Expense Transfers	59,248.00	0.00	-59,248.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		2,273,227.97	0.00	-1,658,632.72	647,193.03	0.00	-32,597.78	20,153.39	3,422.42	16,730.97	-49,328.75

OK Cancel

eForms Page Features

Search Match

Search Match should always be performed when assigning a new or an existing employee.

Search Match

First Name
Last Name SSN
Empl ID Company Job Opening ID

Find | | First 1-519 of 519 >|

Name and ID	Phone	Address		Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthDate	National ID	
74 Arlington			<input type="button" value="Select"/>			PRF	John		Smith			
75 Arlington			<input type="button" value="Select"/>			PRI	John		Smith			
76 Arlington			<input type="button" value="Select"/>			PRF	John		Smith			
77 Arlington			<input type="button" value="Select"/>			PRI	John		Smith			
78 Arlington			<input type="button" value="Select"/>			PRF	John		Smith			

eForms Page Features

Address Validation

The Clean Address feature is used to correct and standardize addresses.

To ensure accuracy, you should run this process when entering addresses on the eForm.

Clean Address

Effective Date

Country

Address 1

Address 2

Address 3

City State

Postal

County

Override Address Verification

New Appointment Forms

The New Appointment Forms include:

Form Title	Purpose
Add New Assignment	Use to assign an incumbent into a position (e.g. new hires and rehires).
Add New Faculty Contract	<p>Use to create a new contract, or update an existing 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.</p> <p>Once the contracted amount has been paid, payroll is stopped; but the employee remains “Active”.</p>
New Position Request	Use to create a brand new position for your department.

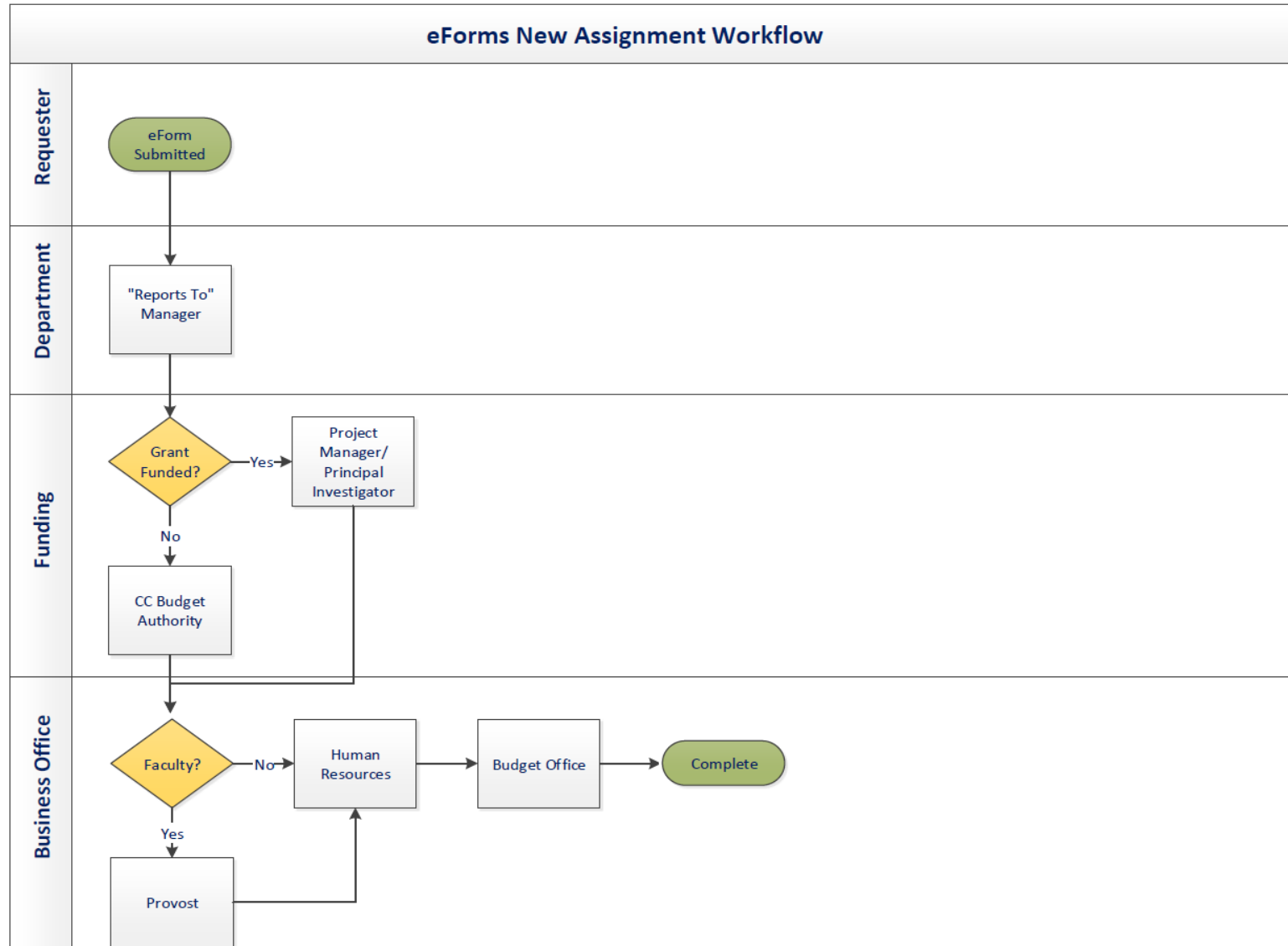
NOTE: Add New Assignment should NOT be used for employee transfers.

Class Activity

- Add New Assignment



Example Workflow



Change Forms

The Change Forms include:

Form Title	Purpose
Modify Position	Use to change the attributes on a vacant or filled position (i.e. Reports To Change, Reorganization, Reclassification, Inactivate/Activate a Position, Transfer a Position, etc.)
Add Additional Pay	Use to request payment outside of an employee's base salary (e.g. supplement, Awards, Special Assignment, etc.).
Pay Rate Change	Use to request an approved salary adjustment for an employee (e.g. equity, promotion, etc.).
Position Funding Change	Use to update position funding and/or the allocation of funding.
Transfer Within Institution	Use to transfer an employee from one position to another within the same department or institution.

NOTE: Transfer Within Institution SHOULD be used for all employee transfers.

Class Activity

- Modify Position



End Forms

The End Forms include:

Form Title	Purpose
End Assignment	Use to end a single or multiple assignments for an employee (i.e. student, non-tenured faculty, etc.).
Employee Retirement	Use for employee's retiring from the University. If the employee has multiple positions, this form will retire all job records for the employee.
Employee Termination	Use to end an employee's employment with the University. This form will terminate all existing job records for the employee.

NOTE: End forms should NOT be used for employee transfers.

Class Activity

- Employee Termination



LOA Forms

The Leave of Absence Forms include:

Form Title	Purpose
Leave of Absence Request	Use to place an employee on paid or unpaid leave (e.g. Academic Development Leave, Administrative Leave, Emergency Leave). Note: This form should not be used for FMLA or Sick Leave Pool.
Return Employee from Leave	Use to return an employee from a paid or unpaid leave of absence.

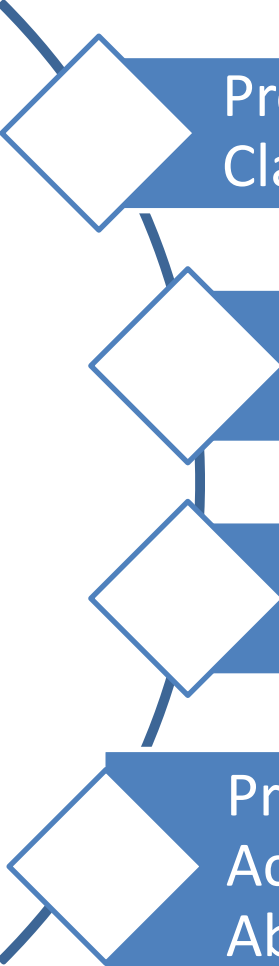
Resources

Available Reports and Queries

Report /Query Name	Description	Navigation
UTA_CA_PERMANENT_BUDGETED_POS	Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_CA_FILLED_WORKSTUDY	Filled position list	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_CA_PERMANENT_BUDGETED_POS	Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_CA_PERM_BDGTD_POS_BY_DEPT	Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_CA_UNFUNDED_POSITIONS	Positions Not Funded	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_HR_JOB_DATA	Job Data by Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_HR_POS_PROFILE	Position Profile by Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_HR_VACANT_POSN	Vacant or LOA position list	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_MONTHLY_ACCRLS	SICK/VAC	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_POS_RPTS_TO	Reports To Information	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTA_VACANT_POSN	Vacant or LOA position list	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTZ_HA_VAC_SICK_LEAVE_BAL_DEPT	Vac/Sick Leave By Dept	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTZ_CA_POSITIONS_FUNDED_DBT	Positions Funded incl. vacant	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTZ_CA_POSITIONS_FUNDED_FILLED	Funded & filled; no vacant	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
PAYROLL ANALYSIS REPORT	Provides salary and benefit information for all employees associated with a specific department. It contains information such as, the funding source, Longevity Pay, Premium Sharing, etc.	NavBar > Menu > Financials > Reporting Tools > BI Publisher > Query Report Scheduler Note: You must have the appropriate security role to view queries/reports in UT Share. Your security role determines the results.

Procedures

For more information on Position Management and Workforce Management refer to the following at <https://policy.uta.edu/>



Procedure HR-E-PR2:
Classification and Allocation of Positions

Procedure HR-E-PR3:
Salary Administration – Classified Service

Procedure HR-E-PR10:
Employee Separation and Clearance Process

Procedures BF-P-PR7:
Accrued Vacation, Sick Leave, Death Benefits, Excessive Absences and Mid-Month Terminations

Resource Information

Support & Help:

- Knowledge Services: 817-272-2155
- Human Resources: 817-272-5554 / AskHR@uta.edu
- ServiceNow Self-Service

Training Resources:

- <https://www.uta.edu/business-affairs/training/>
 - Register for Classes
 - Join Business Affairs Listserv
 - View and/or Print Training Materials
 - PowerPoint
 - Training Guide
 - Job Aids