UNIVERSITY OF TEXAS ARLINGTON

KNOWLEDGE SERVICES

Position and Workforce Management

R 8/5/21

Agenda

- Overview
- Review Position and Job Data
- eForms
- Reports and Queries

Position & Workforce Management Overview

Position & Workforce Mgmt Overview

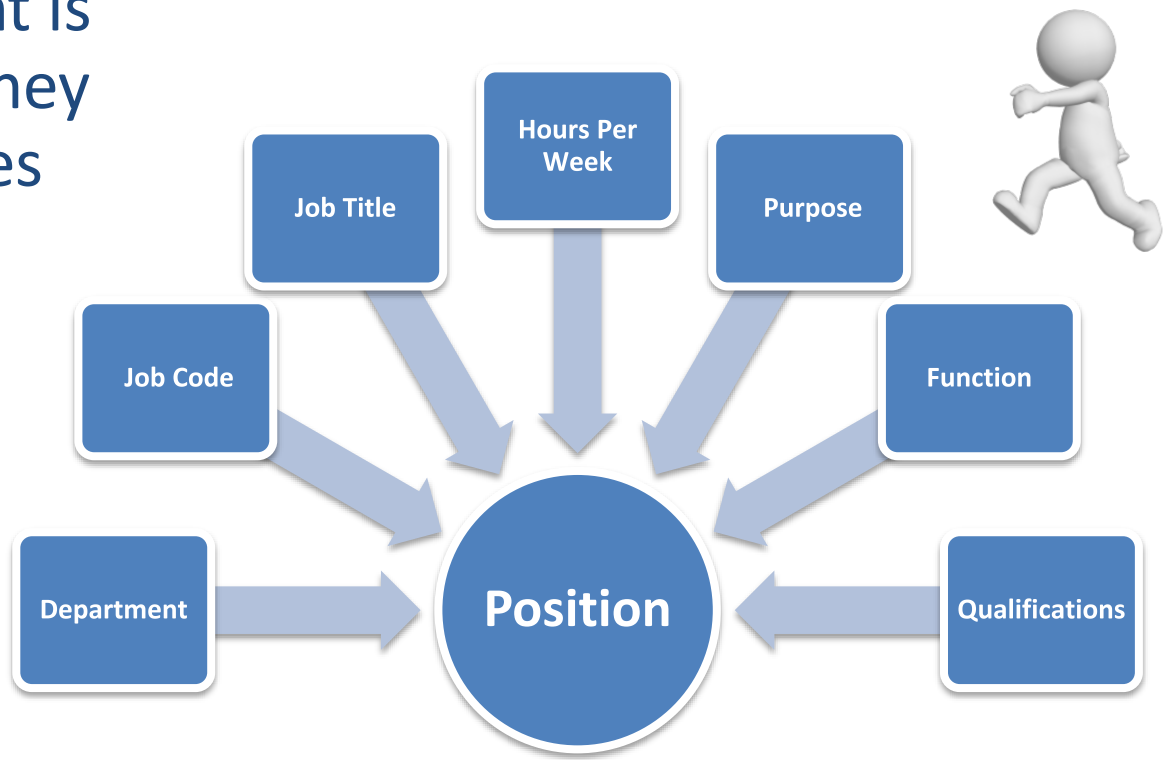
The HCM (Human Capital Management) module in UT Share is used to manage positions and employee data.

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:

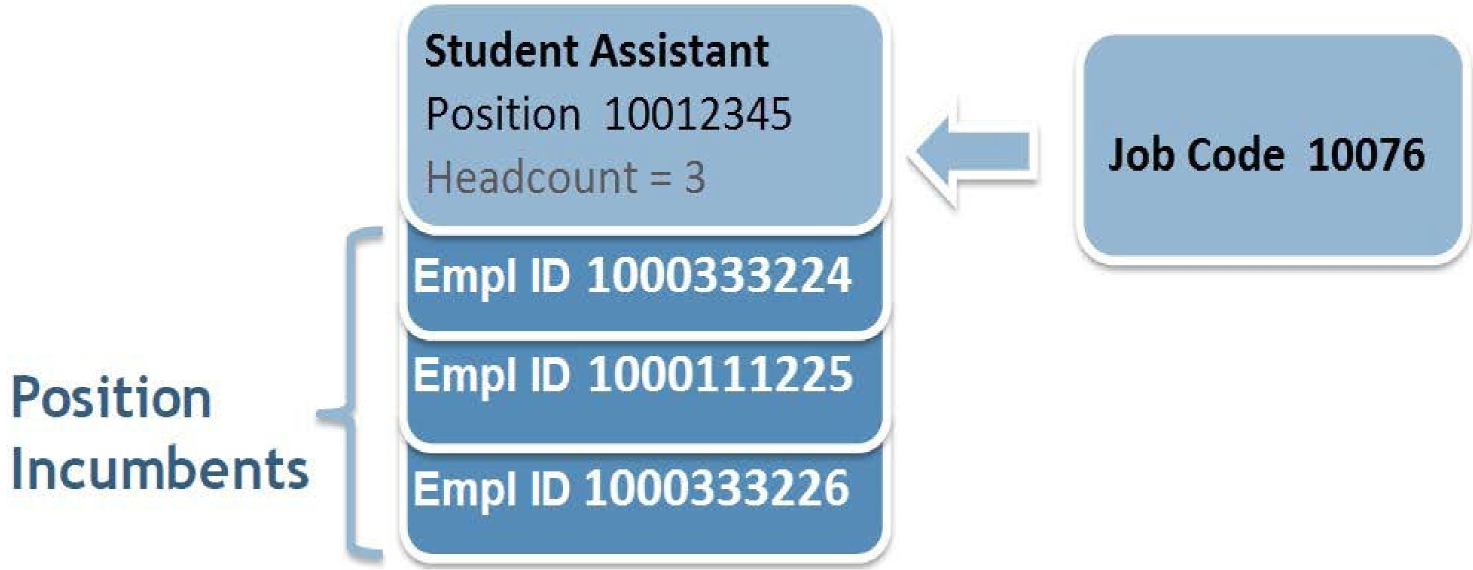
- Classified
- Administrative and Professional
- Faculty
- Graduate Student
- Undergraduate Student
- Persons of Interest - Job Codes for POIs usually starts with an "A". Listed below are examples:

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**

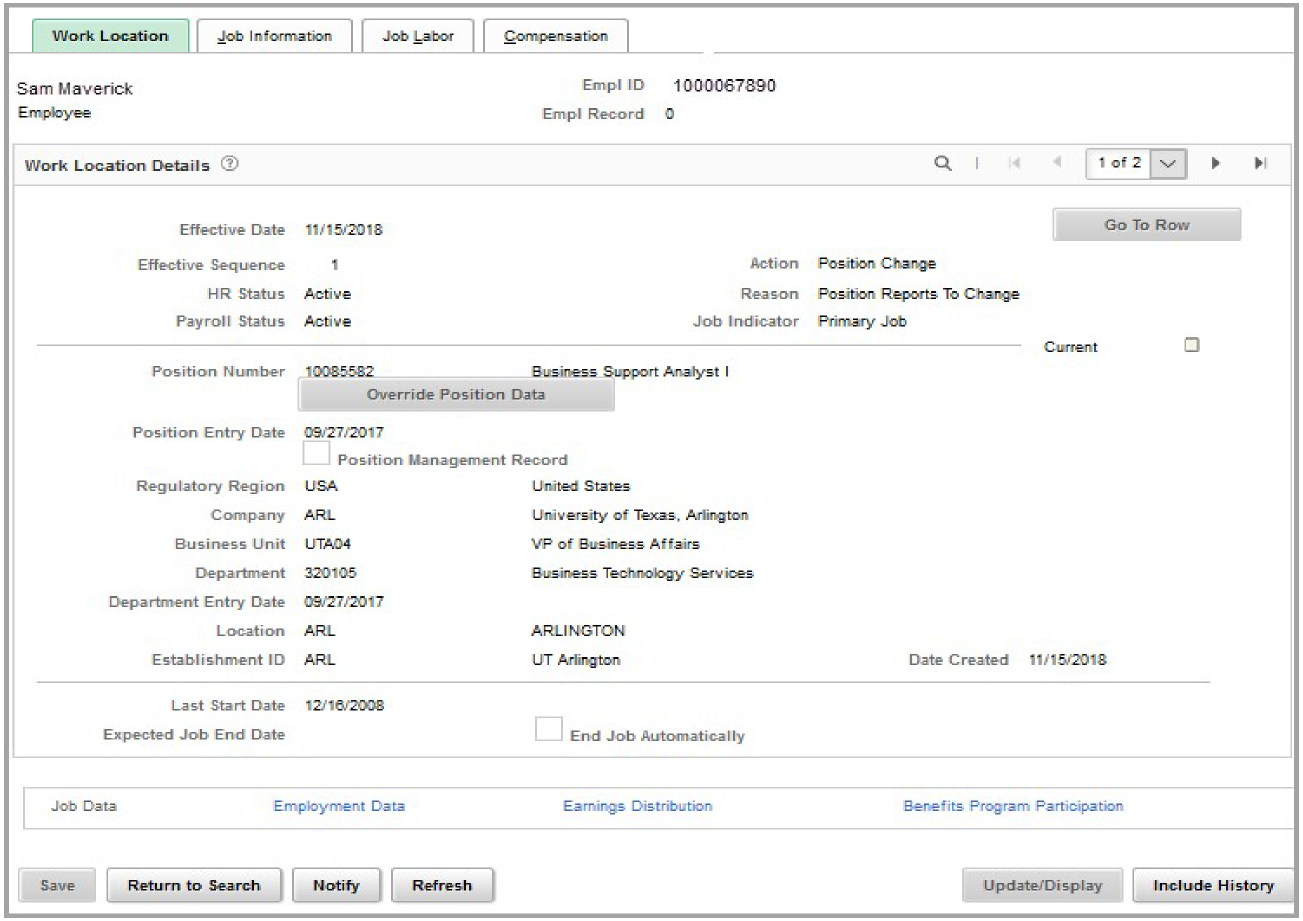
Staff: Contact TCI Talent Acquisition for all hiring and search needs related to staff: **employment@uta.edu**

Review Position & Job Data

Review Position and Job Data

Job Data

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



NavBar > Menu > HRMS > Workforce Administration > Job Information > Job Data

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 1000309768

Job Information 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	

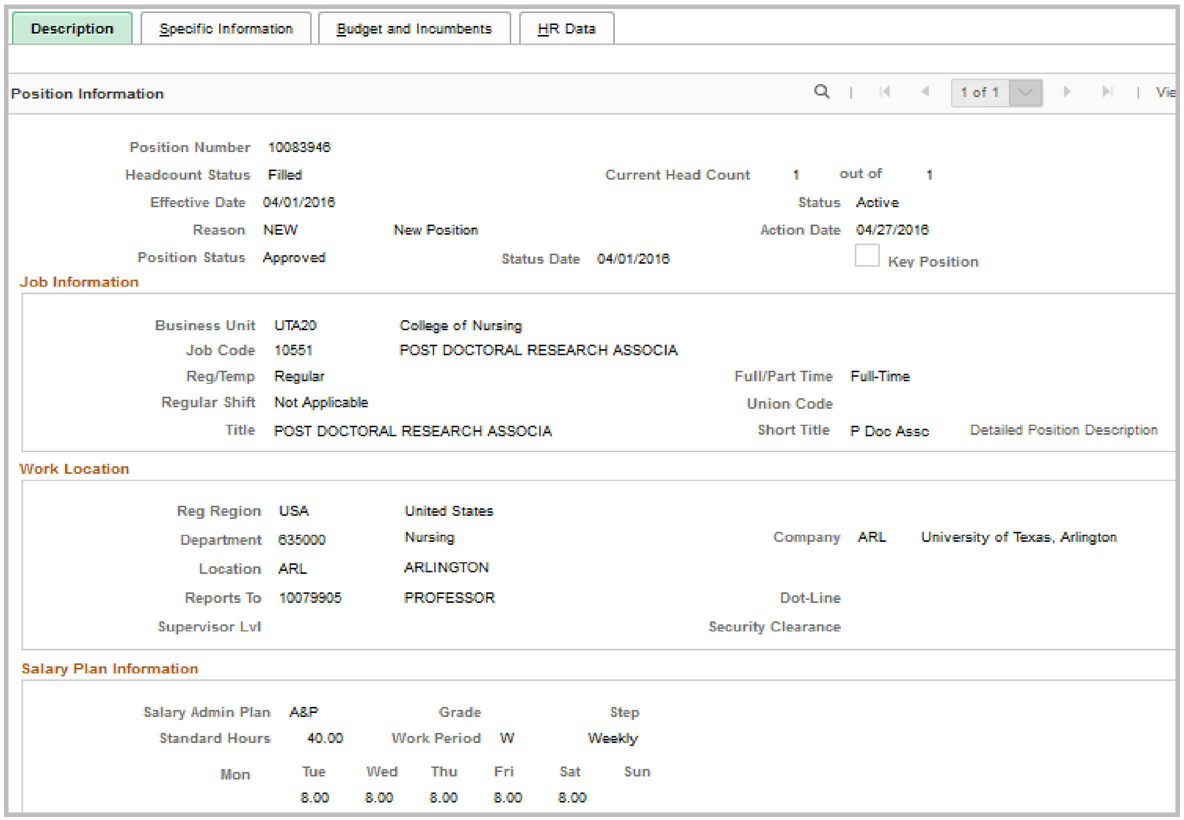
General | Job Information | Work Location | Salary Plan | Compensation | Distribution | Contract

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	08/31/2019
EMP	0	11/15/2018	0	2019				320105	310172	10085582	100146528	100.000	09/01/2018	08/31/2019

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 — 1 of 1

Position Number 10083946

Headcount Status Filled — Current Head Count 1 out of 1

Effective Date 04/01/2016 — Status Active

Reason NEW New Position — Action Date 04/27/2016

Position Status Approved — Status Date 04/01/2016 — 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

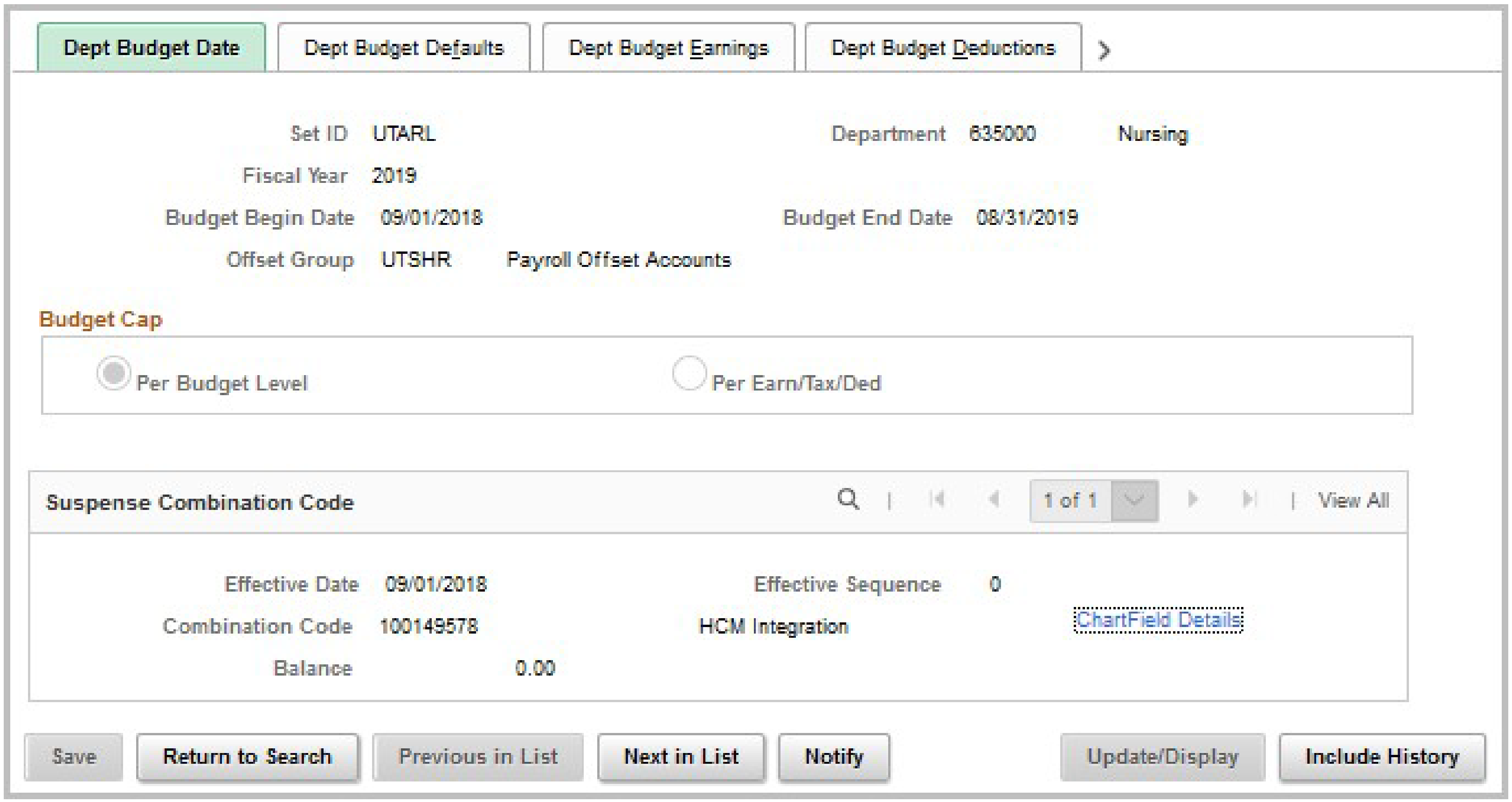
Mon	Tue	Wed	Thu	Fri	Sat	Sun
	8.00	8.00	8.00	8.00	8.00	

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.



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

Review Position & Job Data

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

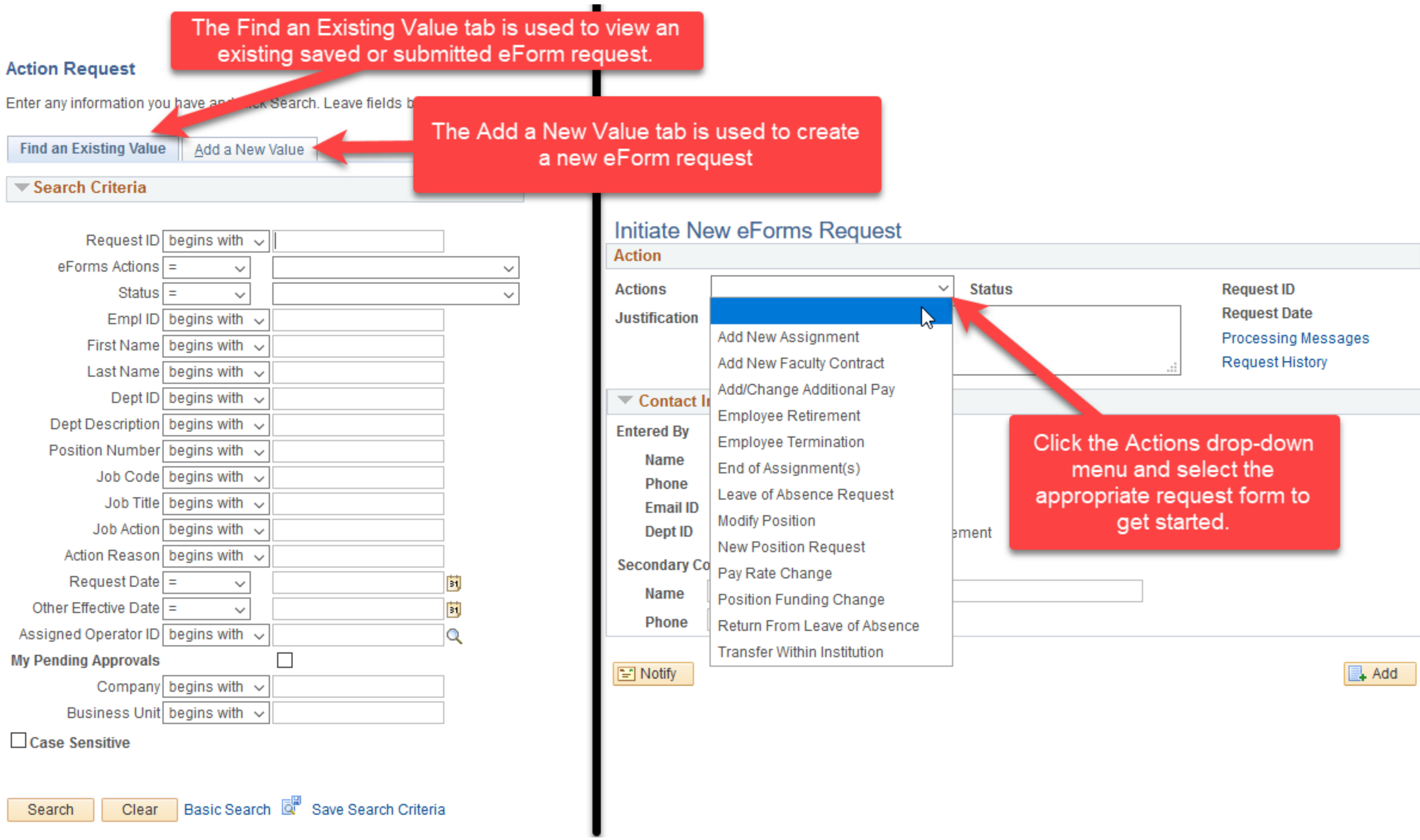
Change Forms
- Add Additional Pay
- Modify Position
- Pay Rate Change
- Position Funding Change
- Transfer Within Institution

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.



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.

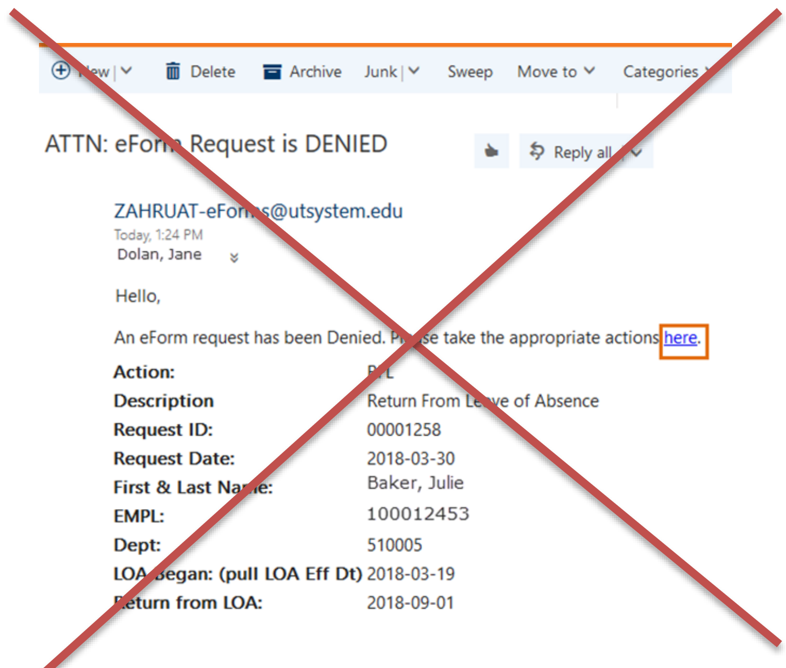
If one portion of funding is denied, the entire document will be returned to the Requester.

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:

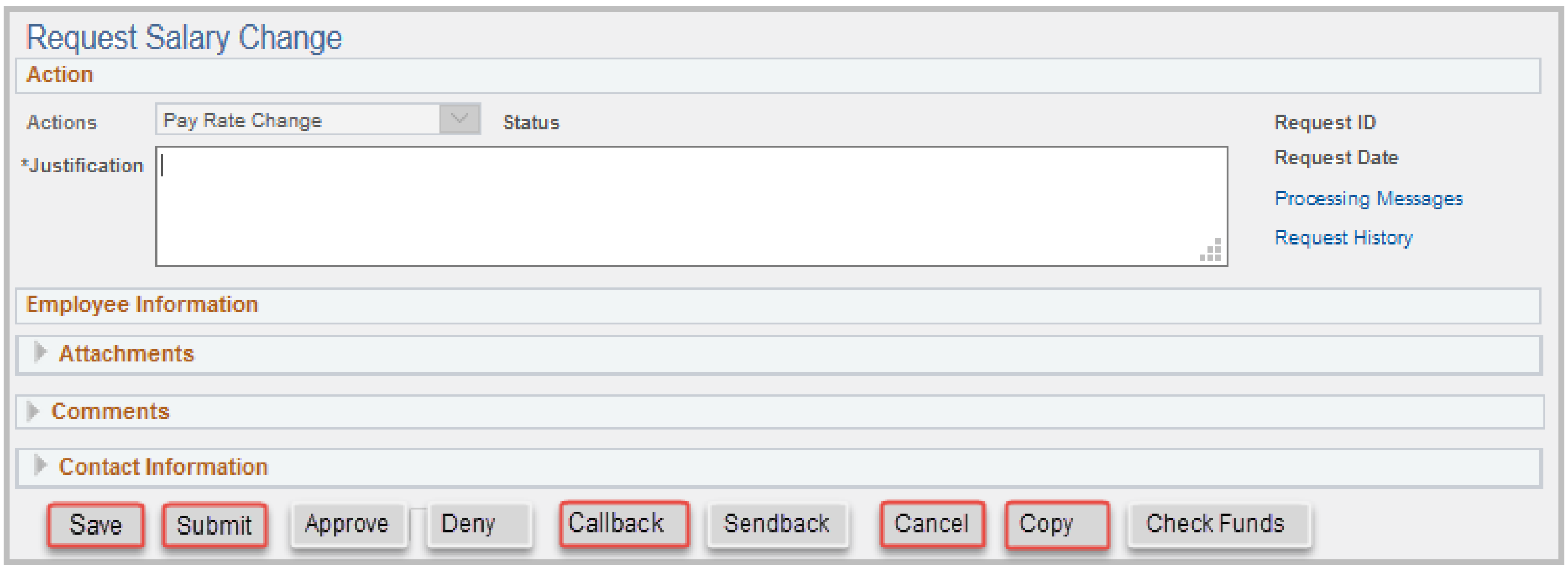
1: eForms pagelet
2: Action Request page
3: Email Message Link
(not recommended)



eForms Action Buttons

Requesters Action Buttons:

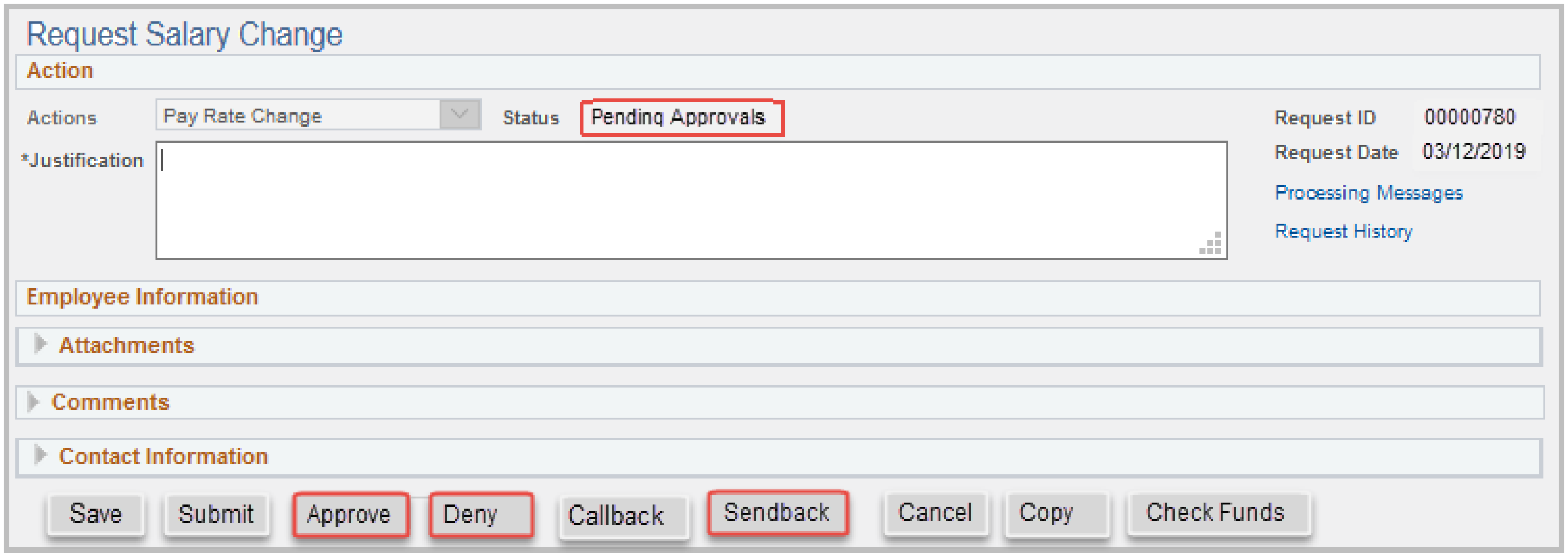
- **Save**
- **Submit**
- **Callback**
- **Cancel**
- **Copy**



eForms Action Buttons

Approvers Action Buttons:

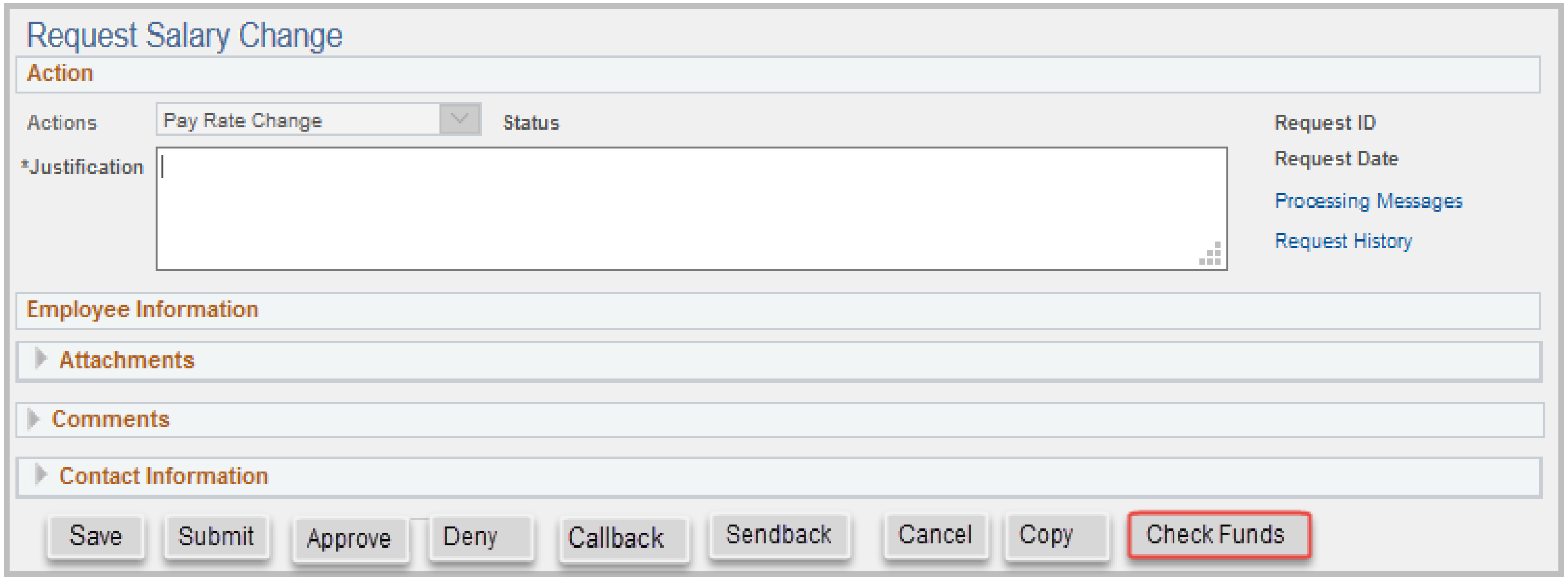
- **Approve**
- **Deny**
- **Send Back**



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.



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

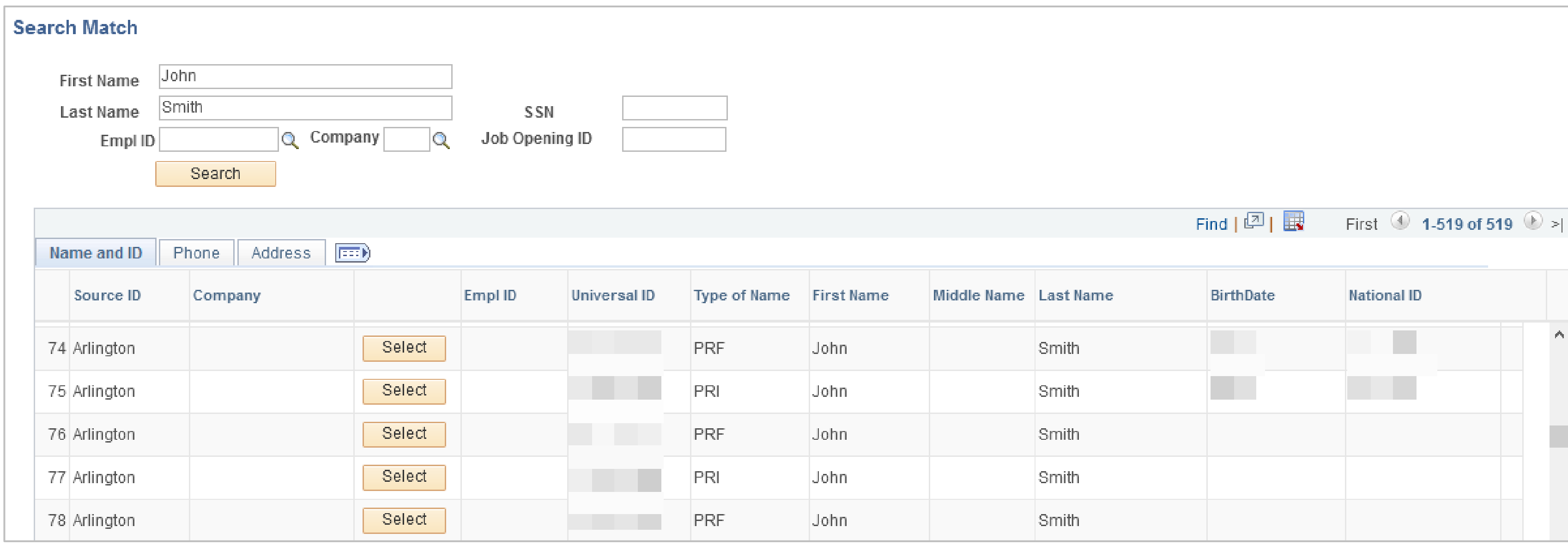
Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	53,194.00	0.00	-57,847.40	20,387.83	0.00	-25,041.23	2,737.93	3,422.42	-684.49	-24,356.74
00051758	51201	SW Classified	0.00	0.00	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: John
Last Name: Smith
SSN:
Empl ID:
Company:
Job Opening ID:

Search

Find | First 1-519 of 519 >|

Name and ID | Phone | Address

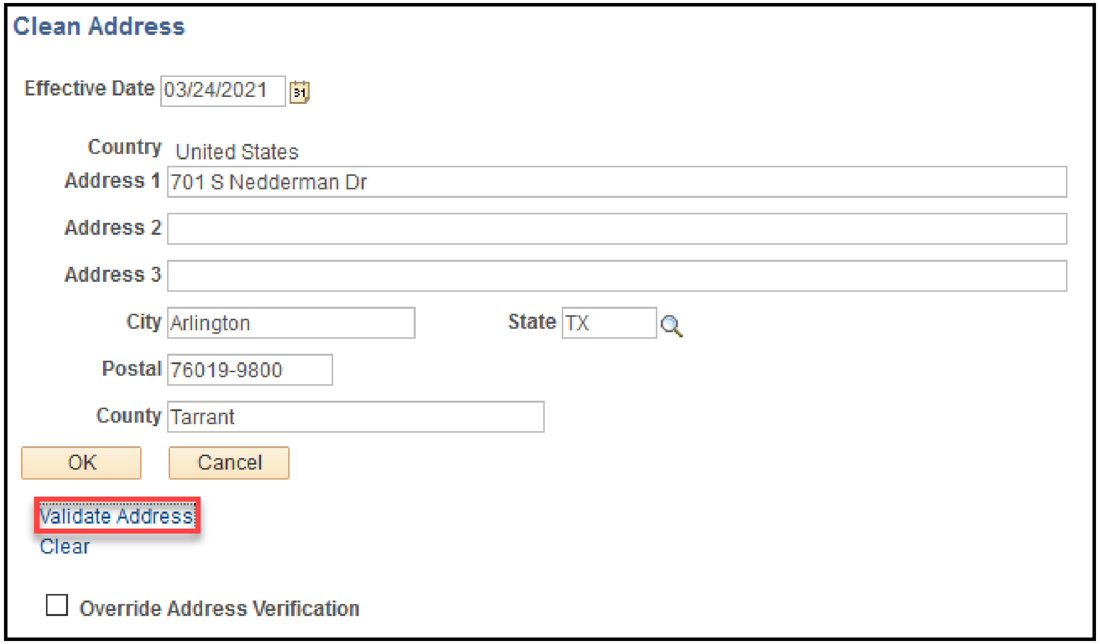
	Source ID	Company		Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthDate	National ID
74	Arlington		Select			PRF	John		Smith		
75	Arlington		Select			PRI	John		Smith		
76	Arlington		Select			PRF	John		Smith		
77	Arlington		Select			PRI	John		Smith		
78	Arlington		Select			PRF	John		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.



New Appointment Forms

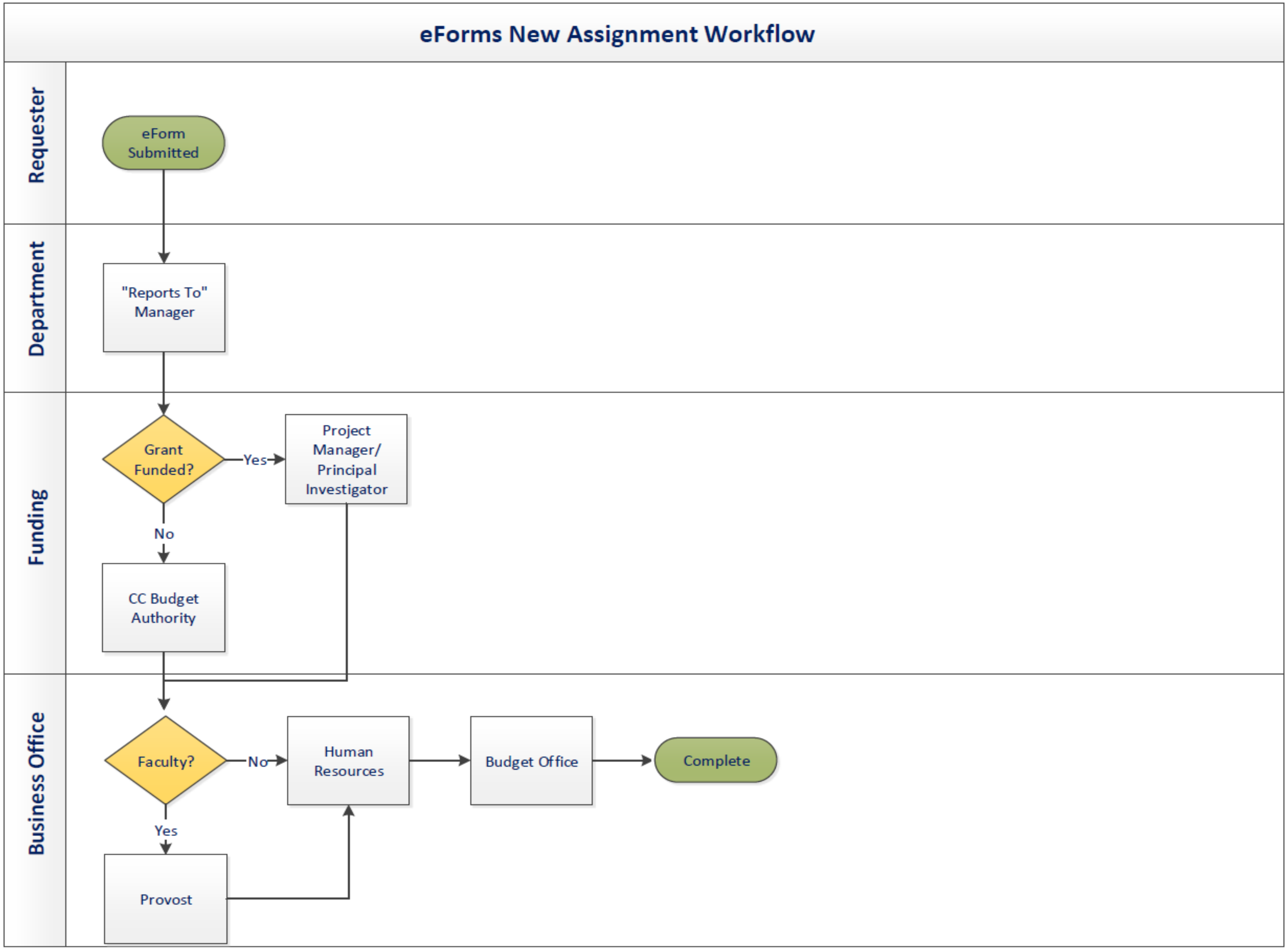
The New Appointment Forms include:

Form Title	Purpose
Add New Assignment	Use to assign an incumbent into a position (e.g. new hires and rehires).
Add New Faculty Contract	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. Once the contracted amount has been paid, payroll is stopped; but the employee remains “Active”.
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 form 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