

Position and Workforce Management

Table of Contents

Position and Workforce Management Overview1
Definitions 1
Empl ID
Job Code
Position Types at UTA1
Position1
Assignment
Funding Source
Incumbent
Pooled Positions
Recruiting Tools at UTA2
Review Position and Job Data
View Job Data
View Job Summary
View Position Information
View Department Budget Table (DBT)11
Processing eForms
Action Request15
Workflow16
Requester Workflow16
Approvers Workflow
Action Buttons
Requesters Action Buttons
Approvers Action Buttons
Check Funds Action Button
Search Match
Address Validation
eForms
New Appointment Forms
Change Forms
End Forms
LOA Forms
Reports and Queries

Resource Information

Position and Workforce Management Overview

UT Share is used by departments at UTA to view incumbent, position, and funding source information. The **Human Capital Management (HCM)** module in UT Share allows management of positions and employee data. **eForms** is an electronic form solution that allows users to create forms in UT Share that supports capturing data, updating data, workflow approvals, auditing, and reporting.

Definitions

Empl ID

A unique 10-digit number, i.e. 1000123456, assigned to individuals with an affiliation with UTA. It is used in the place of the SSN to identify an individual.

Job Code A code used to identify a job role at the university, i.e. 10076 = Student.

Position Types at UTA

Classified, e.g. Accounting Clerk, Support Specialist, Administrative Assistant

Administrative and Professional, e.g. Accountant, Manager, Director, President

Faculty, e.g. Professors, Instructors, Lecturers

Graduate Student, e.g. Teaching Assistant, Research Assistant

Undergraduate Student, e.g. Student Assistant, Student Associates, Tutors

Persons of Interest (POI): This is an individual doing work for the University who is not considered a traditional employee. A POI may include visiting researchers, visiting students, volunteers, perspective employees, independent contractors. Job Codes for POIs usually start with an "A".

Position

A position is a collection of tasks, duties, and responsibilities performed by an employee. It contains the attributes for a specific job such as Department, Job Code, Job Title, Purpose and Function, Qualifications, and Hours per Week. When a Position is created, a **Position ID** number is generated. It is a unique eight-digit number, i.e. 00012354, used to identify the position.

Assignment

An Assignment is the relationship between an incumbent and a position. It connects the incumbent to the position they hold.

Funding Source

This is the Chartfield values used to fund the position.

Incumbent

An Incumbent is an individual who currently holds the position.

When an incumbent is hired (assigned) to work in a position, the incumbent inherits the attributes of the position. When the incumbent leaves the position, the position stays on the organization chart, becomes vacant, and the information associated with the position is retained. Another incumbent can now fill the position.

EXCEPTION: Tenured Faculty Positions: When the incumbent leaves a tenured faculty position, the position should end. A new position must be created for a new tenured faculty member joining the university.

Pooled Positions

Most positions will have a Headcount of one. A position's Headcount indicates the maximum number of incumbents that can be assigned to a position. A position created for an Undergraduate Student or Person of Interest can have multiple incumbents. This type of position is called a "Pooled Position".

Incumbents in a Pooled Position must share the following attributes:

- Job code
- Pay Type (hourly, monthly)
- Paid from the same funding source (Cost Center or Project)
- Hours per week
- Appointed within the same assignment date range

Note: The incumbents in a Pooled Position can have different pay rates.

Recruiting Tools at UTA

PeopleAdmin is used to recruit and hire staff, faculty and administrators. Departments can create a job posting, run reports, review and manage applications. For more information, contact HR Employment Services at 272-3461.

Handshake: is a career center platform for on-campus (e.g. Tutors, Student Assistant, etc.) as well as off-campus job/internship postings. This tool is used to manage applicants. For more information, send an email to careers@uta.edu or call 817-272-2932.

Review Position and Job Data

There are several pages in UT Share used to view Position and Job Data:

- Job Data
- Job Summary
- Position Information
- Department Budgeting Table (DBT)

View Job Data

The Job Data page is used to view position information such as work location (position number, physical location, department, assignment dates), job information (job code, Reports To, part-time/full-time status), and compensation (salary information, e.g. daily, weekly, monthly and annual pay rate).

- 1. Navigate to: NavBar > Menu > HRMS > Workforce Administration > Job Information > Job Data
- The Current Job search page is displayed. This page provides several options for performing a search. The most common search method is by Empl ID or Name.
- 3. Enter the search parameter in the appropriate field and click the **Search** Button

nd an Existing Value	Keyword Search
rch Criteria	
Empl ID	begins with
Empl Record	= ~
Name	begins with ~
Last Name	begins with ~
Second Last Name	begins with v
ate Character Name	begins with v
Middle Name	begins with

The **Job Data** page is displayed. This page is divided into four tabs: **Work Location** (default tab), **Job Information**, **Job Labor**, and **Compensation**.

Favorites 🗸 Main Menu 🗸	$>$ Workforce Administration ${\color{red} \bullet}$ > $$ Job Information ${\color{red} \bullet}$ > $$ Job Data
Employee Self-Service	Training
Work Location	ob Information Job Labor Compensation
Sam Maverick	Empl ID ¹⁰⁰⁰¹²³⁴⁵⁶
Employee	Empl Record 0

The **Work Location** page shows the overall job data. It shows the Effective Date of the current job record, the Position number, Position entry date, Company, Business Unit, Department, Location, etc.

This page also shows an employee's start date, status, the effective date of the current record, and the actions/reasons that this record was entered.

Historical records can be accessed by checking **Include History** from the search page and then clicking through the arrows at the top of the job record.

This will allow a user to view all the actions on an employee's position.

Work Location Job Informati	on Job Labor Co	mpensation			
estasia Salem		Empl ID			
ployee		Empl Record 0			
ork Location Details ⑦			QI	€	
Effective Date	09/01/2020			Go To Row	
Effective Sequence	0	Action	Position Change		
HR Status	Active	Reason	Position Data Update		
Payroll Status	Active	Job Indicator	Primary Job	_	_
Position Number	10010225 Override Position	Business Support Analyst I Data		Current]
Position Entry Date	01/21/2020	Record			
Regulatory Region	USA	United States			
Company	ARL	University of Texas, Arlington			
Business Unit	UTA11	VP of Information Technology			
Department	340301	OIT Knowledge Services			
Department Entry Date	01/21/2020				
Location	ARL	ARLINGTON			
Establishment ID	ARL	UT Arlington	Date Created	09/22/2020	
Last Start Date Expected Job End Date	02/01/2017	End Job Automatically			
Job Data Er	ployment Data	Faminas Distribution	Popofito Program	n Participation	
	iproyment Data	Carnings Distribution	Benefits Program	n Faruopauoli	
Save Return to Search	Notify Refresh		L	Jpdate/Display	lude Histon

The **Job Information** page is used to view job code, job title, and Reports To information. Also, it provides part-time/full-time status, hours per week, and FTE (Full-Time Equivalent) information.

Sam Maverick		Empl ID	1000067890		
mployee		Empl Record	0		
Job Information Details ③				Q. 4	1 of 2 🗸 🕨
Effective Date	11/15/2018				Go To Row
Effective Sequence	1		Action	Position Change	
HR Status	Active		Reason	Position Reports To Change	
Payroll Status	Active		Job Indicator	Primary Job	ourset 🗍
Job Code	10076		Student Assistant		Current -
Entry Date	09/27/2017				
Supervisor Level					
Reports To	10010647		Personal Computing	Specialist 1000012345	
Regular/Temporary	Regular		Full/Part Part-Time		
Empl Class	Student	(Officer Code Not Applica	able	
Regular Shift	Not Applicable		Shift Rate		
Classified Ind			Shift Factor		
Standard Hours ⑦					
Standard Hours	19.00	N.	Work Period W	Weekly	
FIE	0.475000		- Franker	0	

Note: The Job Labor page is not used at UT Arlington

Work Location Job Information Job Labor Compensation Sam Maverick Employee Compensation Details ③ Q, | |4 |4 |1 of 2 ∨ ▶ ▶| Action Position Change Effective Sequence 1 HR Status Active Reason Position Reports To Change Payroll Status Active Job Indicator Primary Job Current 360.21 🚚 USD Semimonthl Frequency s Compensation Rate Academic Rate 0.000000 Comparative Information (2) Pay Rates ③ Default Pay Components Pay Components ③ 🗐 🔍 1-1 of 1 🗸 🕨 ₿ Q Amounts Controls Changes Conversion III Rate Code Seq Comp Rate Currency Frequency Percent 1 NAANNL 8,750000 🗊 USD н

The **Pay Rates** section displays an employee's *Daily, Weekly, Monthly,* and *Annual* pay rate. To view the pay rates, click the expand arrow to open the section.

▼Pay	r Rates ⑦						
Г	Daily	33.250000	USD	Monthly	720.416666	USD	1
	Weekly	166.250000	USD	Annual	8,644.999992	USD	

View Job Summary

The Job Summary page displays tabled job history by fiscal year for an incumbent. This page provides historical data such as job code, position number, Reports To, salary information, e.g. daily, weekly, monthly, and annual pay rate, and funding information.

- Begin by navigating to: NavBar > Menu > HRMS > UTZ Customizations > Human Resources > Job Summary
- 2. The Job Summary search page is displayed. This page provides several options for performing a search. The most common search method is by Empl ID or Name.
- 3. Enter the search parameter in the appropriate field and click the **Search** button.

The Compensation page is used to view the incumbent's salary information such as the compensation rate and compensation frequency (monthly, hourly, or contract).

Find an Exis	sting Value				
Search (Criteria				
	EmpLID	heains	with	~	
	Empl Record	=	~]	
	Name	begins	with	, ~	
	Last Name	begins	with	\sim	
Secon	d Last Name	begins	with	\sim	
Alternate Cha	aracter Name	begins	with	\sim	
1	Middle Name	begins	with	\sim	
	Fiscal Year	=	\sim]	
Case Ser	sitive				

The Job Summary page is divided into seven tabs: General (default tab), Job Information, Work Location, Salary Plan, Compensation, Distribution, and Contract. This page displays historical data for an incumbent such as job history, salary, and funding source information.

	<u>G</u> eneral	Job Information	Work Location	<u>S</u> alary Plan	<u>Compensation</u>	Distribution	Contract
--	-----------------	-----------------	---------------	---------------------	---------------------	--------------	----------

The **Job Information** tab provides the employee's job code history, the effective date for the job, part-time/full-time status, and standard work hours.

Job Sun	nmary									
Sam Maver	ick				EM	Р	Empl ID 10000	67890		
Job Inform	nation						Personalize	e Find 💷 📑	First 🤇) 1-3 of 3 🕑
<u>G</u> eneral	Job Inform	nation W	ork Location	Salary Pl	an <u>C</u> ompei	nsation <u>D</u> i	istribution Co	ntract 📖		
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
EMP	0	09/01/2018	8	19205	Salaried	Active	Full-Time	Regular	40.00	Weekly

Job Sum	Job Summary											
Sam Maveri	ck						EMP	Empl ID	1000067890			
Job Information Personalize Find 💷 🌆 First 🚯 1-3 of 3 🕑 Last												
General Job Information Work Location Salary Plan Compensation Distribution D												
Org Relation	Empl Record	Effective Date	Seq	Sal Plan	Gra	ide	Step	Pay Group	Frequency			
EMP	0	11/15/2018	1	CLAS	10		O	MON	Monthly			
EMP	0	11/15/2018	0	CLAS	10		0	MON	Monthly			
EMP	0	09/01/2018	8	CLAS	10		0	MON	Monthly			

The **Salary Plan** tab provides the employee's salary plan history, grade, and frequency.

The **Compensation** tab provides the employee's compensation rate history such as annual, monthly, daily, and hourly rate of pay.

Job Sum	mary										
Sam Maverio	k				EMF	Þ	Empl ID	1000067890			
Job Information Personalize Find 🔄 🔜 First 🕚 1-3 of 3 🛞 Last											
General	Job Inform	ation <u>W</u> ork	Location	Salary Plan	Compens	sation	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			
EMP	0	09/01/2018	8	53200.000		204.615	25.576923	USD	2.308		

The **Distribution** tab displays the history of funding distribution for the employee. This information includes the cost center/project used to fund the employee's position, position number, and the percentage of the funding distribution

Job Sun	ob Summary													
Nita Alexan	Nita Alexander EMP Empl ID 1000303788													
Job Inform	Job Information Personalize Find 🕮 🔣 First 🛞 1.3 o													
General	Job Inform	nation <u>W</u>	ork Location	Salary Plar	n <u>C</u> ompensat	ion Distribution Co	ntract							
Org Relation	Empl Record	Effective Date	Seq	Fiscal Year	Earnings Code	Project	PC Business Unit	Department	Cost Cente	Position Number	Combination Code	Percent of Distribution	Begin Date	End Date
EMP	o	11/15/2018	1	2019				320105	310172	10085582	100148528	100.000	09/01/2018	08/31/2019
EMP	o	11/15/2018	0	2019				320105	310172	10085582	100146528	100.000	09/01/2018	08/31/2019
EMP	0	09/01/2018	8	2019				320105	310172	10085582	100146528	100.000	09/01/2018	08/31/2019

If the employee is contract pay, i.e. faculty, the **Contract** tab displays the contract number and the start and end dates of the contract.

Job Sumr	mary							
					EMP	Empl ID		
Job Informa	tion			Persona	alize Find 💷	16	First 🕘 1-3 o	r 3 🛞 Last
Work Loc	ation Salar	y Plan Comp	ensation	Distribution	Contract	D		
Org Relation	Empl Record	Effective Date	Seq	Contract #	Begin Date	E	nd Date	
EMP	C	11/15/2018	1					
EMP	O	11/15/2018	0					
EMP	0	09/01/2018	8					

View Position Information

The **Position Information** page is used to track position related data. This page contains information such as Reports To, owning department, part-time/full-time status, assigned incumbent (if filled), position headcount, position classification, e.g. student, classified, faculty, A&P, etc.

- Navigate to: NavBar > Menu > HRMS > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info.
- The Position Information search page is displayed. This page provides several options for performing a search. The most common search method is by Position Number, Department, or Job Code.
- Enter the search parameter in the appropriate field and click the Search button.
 NOTE: If you want to be able to view the position history, check the "Include History" box.

Add/Update Position Enter any information you have	Info and click Search. Leave fields blank for a list of all	values.
Find an Existing Value		
 Search Criteria 		
Position Number	begins with 🤟	
Description	begins with 🗸	
Position Status	= ~	
Business Unit	begins with 🗸 🖸 C	L
Department	begins with 🗸 🖸 C	L
Job Code	begins with 🗸 🖸 C	L
Reports To Position Number	begins with 🗸	
Include History Case	Sensitive	
Search Clear Bas	sic Search 📓 Save Search Criteria	

The **Position Information** page is divided into four tabs: **Description** (default tab), **Specific Information**, **Budget and Incumbents**, and **HR Data**.

	Description	Specific Information	Budget and Incumbents	<u>H</u> R Data
Ľ				

The **Description** tab is broken into four sections: Position Information, Job Information, Work Location, and Salary Plan Information. This section will display the overall attributes of the position itself including status, headcount, effective date, etc.

The **Position Information** section provides the position number, the current maximum headcount for the position, the actual head count, the effective date of the position, the status of the position, and the status date.

Position Information					
Position Number Headcount Status Effective Date	10016968 Filled		Current Head Count	1 o Status	out of 1 Active
Reason Position Status	FRT Approved	Position FTE/Ben Elig/Reg/Tem Status Date (p 05/01/2014	Action Date	09/20/2018

The **Job Information** section provides the job code, title, and the part-time/full-time status for the position.

Job Information				
Business Unit	UTA25	Global Ed, Outrch, Ext Studies		
Job Code	19017	Customer Service Representativ		
Reg/Temp	Regular		Full/Part Time	Full-Time
Regular Shift	Not Applicable		Union Code	
Title	Customer Service	Representativ	Short Title	Csr

The **Work Location** section provides the department associated with the position, the primary location, and the position number of the individual to whom the position reports.

ork Location						
	Reg Region	USA	United States			
	Department	511009	Admiss, Records and Registrat	Company	ARL	University of Texas, Arlington
	Location	ARL	ARLINGTON			
	Reports To	10010613	DIRECTOR*	Dot-Line		
	Supervisor Lvl			Security Clearance		

The **Salary Plan** section provides the salary class and hours per week for the position.

Salary Plan In	nformation						
	Salary Admin Plan Standard Hours	CLAS 40.00	Wor	Grade 06 Work Period W		Step Weekly	
	Mon	Tue 8.00	Wed 8.00	Thu 8.00	Fri 8.00	Sat 8.00	Sun

The **Specific Information** tab displays the current and maximum head count for the position, the PO Box number, and work phone number where the position is located. Also, this page provides FTE (Full-Time Equivalent) information.

	Description	Specific Information	Budget and Incumbents	HR Data		
The FTE value is used to calculate		Position Number 1 Headcount Status F	10014934 Filled		Current Head Count 1	out of 1
the budget for the position e.g.	Specific Inform	nation			Q, 4	4 1 of 1 🗸 🕨 🕅 🗌 View A
100%=1.0, 75%=.75, 50%=.50.		Effective Date 01	1/01/2019		Status	Active
		Max Head Count Mail Drop ID 19 Work Phone	1 9197		Ir	Update Incumbents
		Health Certificate	1//2/2-2581			V Include Salary Plan/Grade
		Signature Authority				Force Update for Title Changes
			•			Budgeted Position Confidential Position Job Sharing Permitted Available for Telework
	 Education 	and Government				
		Position Pool ID)			
	'	Pre-Encumbrance Indicator	No Encumbrance		Calc Group (Flex Serv	ice)
		Encumber Salary Option	Salary Step		Academic R	lank
		Classified Indicator	Classified		FTE 1.000	000 🗹 Adds to FTE Actual Count

The **Budget and Incumbents** tab displays the incumbent(s) assigned to the position. In addition, it provides the Empl ID, record number, part-time/full-time status and hours per week for the incumbent(s).

Specific	Information	Budget a	nd Incumbents	HR Data					
Position N	lumber 100	14934							
Headcount	Status Fille	d				Curi	ent Head Count	1	out of
t									
nings	Deductions	Ta	ax Cdn 1	Гах	Total				
0.000	0.000	0.0	00 0.0	000	0.00				
ents									
									1-1 of 1
Empl Record	Full/Part	Stnd Hrs/Wk	Name	Effective D	ate Action		Action Reason	Override Position Data	Job Dat
0	Full-Time	40.00	Sam Maverick	01/01/2019) Pay Ra	te Change	Merit	N	Job Dat
	Specific Position I Headcount t t ents Empl Record 0	Specific Information Position Number 100 Headcount Status Fille t	Specific Information Budget a Position Number 10014934 Headcount Status Filled t 10000 0.000 0.000 ents Full/Part Stind Record Full/Part 0 Full-Time	Specific Information Budget and Incumbents Position Number 10014934 Headcount Status Filled t 10014934 bings Deductions Tax Cdm 0.000 0.000 Full/Part Stind Hrs/Wrk Name 0 Full/Part 40.00 Sam Maverick	Specific Information Budget and Incumbents HR Data Position Number 10014934 Headcount Status Filled t t sings Deductions Tax Cdn Tax 0.000 0.000 0 Full/Part Sind Hrs/Wk Name Effective D 0 Full-Time 40.00 Sam Maverick 01/01/2015	Specific Information Budget and Incumbents HR Data Position Number 10014934 Headcount Status Filled t t sings Deductions 0 0.000 0 Full/Part Stind Hame effective Date Action 0 Full-Time 40.00 Sam Maverick 0 Full-Time	Specific Information Budget and Incumbents HR Data Position Number 10014934 Curr Headcount Status Filled Curr t	Specific Information Budget and Incumbents HR Data Position Number 10014934 Current Head Count Headcount Status Filled Current Head Count t	Specific Information Budget and Incumbents HR Data Position Number 10014934 Current Head Count 1 Headcount Status Filled Current Head Count 1 t t 0.000 0.000 0.000 0.000 0.000 ents Effective Date Action Action Reason Override Position Data 0 Full/Part Stind Hrs/Wk Name Effective Date Action Action Reason Data

The **HR Data** tab displays the employee class, current and past, of the incumbent. This information is based on the person not the position.

Description	Specific Information	Budget and Incumbents	HR Data									
Docition Number 10014034												
Pos	Readcount Statue Filled Current Read Count 1 out of 1											
Head	Reaucount Status Filled Current Read Count 1 Out of 1											
Business Unit	UTA25											
UTZ Position Data Q 14 4 1 of 1 View All												
Effective Date	01/01/2010 Effectiv	n Data 01/01/2019 Rucin	occ Unit LITA?	25								
Enecuve Date	checuve bate o ho hzo ha checuve bate o ho hzo ha busilless Unit. O hZO											
Emplicias	CL Classified		Officer Code	Not Applicable								
All Dates with S	ame Business Unit											
Effective Date	01/01/2019											
Empl Class	01/01/2019		Officer Code	Not Applicable								
Empiciass	CL Classified		Officer Code	Not Applicable								
Effective Date	05/01/2019											
Enective Dute	05/01/2018											
Empl Class	CL Classified		Onicer Code	Not Applicable								
Effective Date	12/01/2016											
Empl Clace	0 00000		Officer Code	Not Applicable								
cmpl Class	CL Classified		onicel code	raor Applicable								

View Position Funding

The Department Budget Table (DBT) is used to view position funding information. This page contains information such as funding source and allocation of funding, budget period beginning and end dates, and incumbent(s) assigned to the position (if filled).

 Begin by navigating to: NavBar > Menu > HRMS > UTZ Customizations > Manager Self Service > Position Management Center, then click the Department Budget Table USA button.

Position Management Center							
Add/Update Position Info Enter the description, work location, and other information about a position.	Department Budget Table USA Define annual budgets.						
Position Update Requests	DBT Change Requests						

- 2. The **Department Budget Table** search page provides several options for performing a search. The most common search method is by **Department** or **Position Number**.
 - a. Searching by Department displays all positions for the department.
 You will be required to select the appropriate position from a Search Results table.
 - b. Searching by Position Number displays information for a specific position in the department.
- 3. Enter the budget year (fiscal year) for the position, i.e. 2019.
- 4. Click the **Search** button.

Department Budget Table US	A
Enter any information you have and cli	ck Search. Leave fields blank for a list o
Find an Existing Value	
Search Criteria	
Set ID 🛛 = 🗸	UTARL Q
Department begins with 🗸	٩
Fiscal Year = 🗸	
Budget Level = 🗸	×
Position Pool ID begins with 🗸	٩
Job Code Set ID begins with 🗸	٩
Job Code begins with 🗸	٩
Position Number begins with 🗸	٩
Empl ID begins with 🗸	٩
Empl Record 😑 🗸 🗸	٩
Include History	
Search Clear Basic Search	h 🖉 Save Search Criteria

NOTE: If you leave the fiscal year field blank and/or if the position existed in multiple budget years, you must select the appropriate row from a **Search Results** table.

Set ID	Department	Fiscal Year	Budget Level	Position Pool ID	Job Code Set ID	Job Code	Position Number	Empl ID	Empl Record
UTARL	635000	2019	Position	(blank)	(blank)	(blank)	10083946	(blank)	0
UTARL	635000	2018	Position	(blank)	(blank)	(blank)	10083946	(blank)	0
UTARL	635000	2017	Position	(blank)	(blank)	(blank)	10083946	(blank)	0
UTARL	635000	2016	Position	(blank)	(blank)	(blank)	10083946	(blank)	0

The **Department Budget Table** page is divided into eight tabs. The various tabs are used by the Budget office to setup funding for positions.

(Page 1)	Dept Budget Date	Dept Budget De <u>f</u> aults	Dept Budget <u>E</u> arnings	Dept Budget Deductions
(Page 2)	C Dept Budget Earn	ings Dept Budget D	Dept Budget I:	axes Budgetary Funding

NOTE: The ">" and "<" allow moving from page one to page two of the tabs.

Departments will use the **Department Budget Earnings** tab and/or the **Budgetary Funding** tab to obtain funding and position information.

- The **Department Budget Earnings** page is used to view the chartfield values to fund the position.
- The **Budgetary Funding** page is used to view the incumbent(s) assigned to the position (if filled).

The **Department Budget Earnings** page displays earnings information for the position.

- The top section of this page provides the department name and the fiscal year for the position budget. In addition, this section displays the beginning and ending dates for the budget period.
- The middle section provides the position number and the title associated with the position. Also, it displays the effective date of the budget row.

	Dept Budget Default	3 Dept Budget Earnings	Dept Budget Deductions	>			
Set ID UTARL	Departm	ient		Fiscal Ye	ar 2019		
	Budget Begin D	late 09/01/2018	Offset Group UTSHR	Budget Cap			
	Budget End D	late 08/31/2019		Per Budget Level	Per	r Earn/Tax/Ded	
Defau	It Funding Source Opt	tion Distrib over Actual Earnin	ngs				
vel					Q	1 of 3 🔹 🕨	▶ I View A
Department	Position P	ool Jobc	ode	Appointment			
Posi	tion Number	PO	ST DOCTORAL RESEARCH ASSO	CIA			
F	Effective Date 07/01/	2019 Eff Seg	0 Status Activ	2	Date Entered 09	/19/2018	
Bude	get Level Cap	0.00	Currency USD				
		0.00	,				
rnings Distribution	n						
≡, Q					14		•
Combination Code	<u>D</u> istributed	Earning Code Description	Combination Code Description	Exclusion Fringe Group	Redirect Combo (Code II⊧	
Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Bud	get Amount	Dist	ribution %
Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Bud	get Amount	Dist	ribution %

If changes have occurred to the position during the fiscal year, i.e. funding source changes, it may be necessary for you to click the **View All** link to view the historical data.

Q I II	▲ 1 of 3 ∨	I View All



The **Earnings Distribution** grid consists of five tabs. Departments will use the Combination **Code** tab and/or the **Combination Code Description** tab to obtain information.

Combination Code	Distributed	Earning Code Description	Combination Code Description	Exclusion Fringe <u>G</u> roup	Redirect Combo Code
------------------	-------------	--------------------------	------------------------------	--------------------------------	---------------------

The **Combination Code** tab displays the **Earnings Code** type, the **Combination Code**, and the budget **Distribution**:

- The Earnings Code specifies the earning type. Examples include:
 - **CDA =** Cell Device Allowance
 - **TMP =** Temporary Supplement
 - **SUP** = Permanent Supplement
 - Note: If the field is blank, the earning type is **Salary**.

- The **Combination Codes** column identifies the funding source(s) for the budget.
- The **Distribution** column displays the percentage of funding allocated to each earning type and funding source. The distribution must equal 100%.

Ea	rnings Distribution					
	≣, Q					I = ● 1-1 of 1 > → →
	Combination Code	<u>D</u> istributed	Earning Code Description Combina	tion Code Description	Exclusion Fringe Group	ct Combo Code III>
	Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
	1	1	100156407			100.000

The **Combination Code Description** tab displays the funding source(s) for the position. The **ChartField Details** link displays the budget information.

ľ	Combination Code	Distributed [Earning Code Description	Exclusion Fringe Group	Redirect Combo Code
	Earnings Code	Sequence Number	Combination Code	Combination Code Description	ChartField Details
	1	1	100156407	HCM Integration	ChartField Details

The **Position Budgetary Funding** page allows you to see the current employee(s) assigned to the position. It will provide the employee ID, record number, part-time/full-time status, hours per week, and the name of the incumbent.

View Incum	nbents								
Position	10083946								
Current Incur	mbents								
≡, Q								1-1 of 1	~
Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	
1234567890	0	Full-Time	40.00	Sam Maverick	07/01/2018	Pay Rate Change	Equity	Ν	

Note: If the position is vacant, this section will be blank.

Processing eForms

After reviewing position information, it may be necessary to create a new position or make changes to an existing position. This can be accomplished by processing the appropriate eForm in UT Share. 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	Change Forms	End Forms	LOA Forms
 Add New Assignment Add New Faculty Contract New Position Request 	 Add Additional Pay Modify Position Pay Rate Change Position Funding Change Transfer Within Institution 	 Employee Retirement Employee Termination End Assignment 	 Leave of Absence Request Return Employee From Leave

Action Request

The Action Request page allows one to find an existing eForm or to create a new eForm.

Navigate to NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions >

Action Request



Workflow

Workflow is an electronic routing and approval process used in eForms. 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 eform for accuracy.

The eForm Approvers are:

- "Reports To" approver Manager listed on the position
- **Funding approver** Depending on the funding source(s), 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 and Contracts, Human Resources, and/or Payroll.

It is highly recommended that at least two or more individuals are designated at each approval level to avoid delays in routing. **Exceptions:** "Reports To" Manager and Principal Investigator approvers.

If an individual is assigned to two different approval levels (e.g. "Reports To" Manager and Funding Approver), it is not necessary to approve the form twice. The document will auto approve at the next stage.

An eForm Requester should not create an eForm if listed as the "Reports To" Manager on a position.

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 eForm will be returned to the Requester.

Requester Workflow

Requesters will receive an email notification when the eForm has been sent back (returned), denied (canceled) or approved.

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

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

Option 1 – Using the eForms Pagelet

- 1. Log into UT Share.
- 2. Navigate to the "Workforce Administrator" homepage and click the "eForms" tile; then click "View Existing Requests."

View Existing Requests	My F	Requests	P	ersonalize F	ind Viev	w All 🖾 🔣	First 6	Prev 1 of 1	Vext 🕑 Last
Create New Request		Request							
My Pending Approvals		ID .	eForms A	ction		Status		Name	
Budget Overview	1	URL							
Reports	My F Appr	Pending rovals		Personali	e Find	View All 🔄	🔜 Fii	rst 🕚 Prev 1	of 1 Next 🕑 Last

Option 2 – Using Action Request Menu

- 1. Navigate to Navigator > Menu > HRMS > UTZ Customizations > eForms HR/Payroll Actions > Action Request
- 2. Search by the **Request ID** number or any other field.
- 3. Enter the search parameter in the appropriate field and click the **Search** button.

Action Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Request ID	begins with \checkmark	
eForms Actions	= ~	~
Status	= ~	~
Empl ID	begins with \smile	
First Name	begins with \smile	
Last Name	begins with \smile]
Dept ID	begins with \checkmark]
Dept Description	begins with \checkmark]
Position Number	begins with \checkmark]
Job Code	begins with \checkmark]
Job Title	begins with \checkmark]
Job Action	begins with \checkmark]
Action Reason	begins with \checkmark]
Request Date	= ~	81
Other Effective Date	= ~	31
Assigned Operator ID	begins with \checkmark	Q
ly Pending Approvals		
Company	begins with $\!$]
Business Unit	begins with \sim	
Case Sensitive		

Option 3 – Using the Email Message Link (not recommended)

- Select the link provided in the email message. Note: Some users have experienced issues connecting to the workflow from using the email link.
- If you are already logged in to UT Share, you will be directed to the eForm page. If not, you will be prompted to provide your login credentials, and then the eForm page is displayed.

🕀 Nev	/ ` ∎	Delete	Archive	Junk 🗸	Sweep	Move to 💙	Categories 🗸
ATTN	eForn	n Reque	est is DEN	IED	*	Reply all	v
	ZAHRU Today, 1:24 Dolan, J	IAT-eForr 4 PM Jane &	ns@utsyster	m.edu			
	Hello,						
	An eFor	m request	has been Der	nied. Please	take the	appropriate a	ictions <u>here</u> .
	Action:			RFL			
	Descrip	otion		Return Fr	om Leave	of Absence	
	Reques	t ID:		00001258	3		
	Reques	t Date:		2018-03-	30		
	First &	Last Nan	ne:	Baker, J	ulie		
	EMPL:			100012	453		
	Dept:			510005			
	LOA Be	gan: (pul	I LOA Eff Dt) 2018-03-	19		
	Return	from LO/	A:	2018-09-	01		

Approvers Workflow

Approvers will receive an email notification when the eForm has been submitted for approval

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

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

Option 1 – Using the eForms Pagelet

- 1. Log into UT Share.
- Navigate to the "Workforce Administrator" homepage and click the "eForms" tile; then click "My Pending Approvals."

View Existing Requests	My Request	My Requests Personalize Find		d View All 🛃 Zoom My Requests 🔣		
Create New Request	ing reequest			1 of 1	Las	
My Pending Approvals	Request	eForms Action	Status	Name		
Budget Overview	1 URL					
Reports	My Pending Approvals	Personaliz	e Find View All	Zoom My Pending Ap First ④ 1	provals	
	Request	eForms Action	Status	Name		
	1101					

Option 2 – Using Action Request Menu

- Navigate to NavBar > Menu> HRMS > UTZ Customizations > eForms HR/Payroll Actions > My Pending Approvals
- Select "Pending Approvals" from the Status field.
- If necessary, enter your Empl ID in the "Assigned Operator ID" field and click Search.
- 4. Select the appropriate eForm from the Search Results table.

Note: If you have only one eForm to approve, it will open after clicking Search.

 Search Criteria 			
Request ID	begins with 🗸		
eForms Actions	= ~		~
Status	= ~	Pending Approvals	~
Empl ID	begins with \checkmark		
First Name	begins with \checkmark		
Last Name	begins with \checkmark		
Dept ID	begins with \checkmark		
Dept Description	begins with \checkmark		
Position Number	begins with \checkmark		
Job Code	begins with \checkmark		
Job Title	begins with \checkmark		
Job Action	begins with \checkmark		
Action Reason	begins with \checkmark		
Request Date	= ~		F
Other Effective Date	= ~		31
Assigned Operator ID	begins with 🗸	1000433597	Q
My Pending Approvals			
Company	begins with $\!$		
Business Unit	begins with $\!$		
Case Sensitive			
Search Clear	Basic Search	Save Search Criter	ia
Search Results			
/iew All			
Request ID eForm Actio	n Statue	Empl ID First No	me Last Name Dent ID Dent Descriptio
Auguous is si vini Autiv		emprile mound	and case manne popt in popt peaciptio

Enter any information you have and click Search. Leave fields blank for a list of all values

Option 3 – Using the Email Message Link (not recommended)

1. Select the link provided in the email message. Note: Some users have experienced issues connecting to the workflow form using the email link.

Action Request

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



Action Buttons

Requesters Action Buttons

- Save: Saves the information entered on the form.
- Submit: Submits the form into workflow.
- **Callback:** Recalls a form for revision or cancellation.
- **Cancel:** Cancels a form that is no longer needed.
- **Copy**: Creates a copy of an existing form

Action		
Actions *Justification	Pay Rate Change Status	Request ID Request Date Processing Messages Request History
Employee In Attachme	formation ents	
Comment	\$	
Contact I	nformation	
Save	Submit Approve Deny Callback Sendback Cancel Copy Check Fur	ids

Approvers Action Buttons

- **Approve:** Approves and routes the form forward.
- **Deny:** Cancels the request completely; no further action can be taken. Comments are required explaining why the form was denied.
- **Send Back:** Returns eForm to the requester. Comments are required explaining why the form was returned.

Action	Salary Grange		
Actions *Justification	Pay Rate Change Status Pending Approvals		Request ID 00000780 Request Date 03/12/2019 Processing Messages Request History
Employee In	nformation		
 Comment 	ts		
Contact I	Information		
Save	Submit Approve Deny Callback Sendback Cancel	Copy Check Fun	ids

Check Funds Action Button

The Check Funds button appears on any eForm that can add or update funding and is available to Requesters and Approvers. This button is used to check the availability of funds for the Cost Center/Project being used for the eForm expense. The Check Funds function will automatically display any time a funding change is recognized when an eForm is submitted.

Action		
Actions Justification	Pay Rate Change Status	Request ID Request Date Processing Messages Request History
Employee Ir	formation	
Comment	8	

The **Review Available Funds** page displays the current condition of your budget.

view Availa	able Fund	s										
Cost Cent	ter 35927	4										
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	-24,356.7
00051758	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	2,737.93	3,422.42	-684.49	0.0
	A1200	Wages	0.00	0.00	-43,256.04	21,060.00	0.00	-64,316.04	0.00	0.00	0.00	-64,316.0
	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	-20,454.9
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	0.0
	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	59,798.9
	A3000	Payroll Related Costs	264,245.97	0.00	-264,106.79	139.18	0.00	0.00	0.00	0.00	0.00	0.0
	A7000	Expense Transfers	59,248.00	0.00	-59,248.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	0	K 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

The **Requested Amount** column displays the estimated expense for the current request and any other pending requests on the same cost center or project.

Currently, the **Check Funds** button is not a hard stop for the eForm request. If the Cost Center or Project is overdrawn, the form will still move forward in Workflow.

Search Match

Search Match should always be performed when assigning a new or an existing employee. This feature searches multiple PeopleSoft environments to help identify Empl IDs and check for duplicate or multiple records for students and employees across UTShare Campuses, e.g. UT Arlington, UT El Paso, UT Permian Basin, UT San Antonio, UT Tyler, UT System.

First Name	Sam		1								
Last Name	Maverick]								
Empl ID											
	Search										
									(2) III		1000
										Elect 4 1.10 of 1	C 1. A. U
									Level me	Caler of 1-16-01-1	0.0
Name and ID	Phone Address								LINE COLUMN	FR61 (* 1*16-01 1	
Name and ID Bource ID	Phone Address (Company		Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthOate	National ID	
Name and ID Bource ID 14 Arilington	Phone Address Company	Select	Empl 10 1000567895	Universal ID	Type of Name PRI	First Name Sam	Middle Name	Last Name Mathew	BirthDate	National ID	
Name and ID Bource ID 14 Ariington 15 Ariington	Phone Address (Company	Select Select	Empl ID 1000567895 1000567897	Universal ID	Type of Name PRI PRI	First Name Sam Samile	Middle Name	Last Name Mathew Mason	BirthOate	National ID	

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. If an exact address match is not found, a suggestion box appears to allow you to select from a list of possible addresses.

Clean Address
Effective 05/02/2019
Country United States
Address 1 123 Somewhere Blvd
Address 2
Address 3
City Arlington State TX Q
Postal 76017-1236
County
OK Cancel
Validate Address Clear
Override Address Verification

eForms

New Appointment Forms

eForm Title	Purpose
Add New Assignment	Assign an incumbent into a position, e.g. new hires and rehires.
Add New Faculty Contract	Create a new contract or update an existing contract. Contracts are used to pay Faculty salary or contracted amount within a specified date range.
	Once the contracted amount has been paid, payroll is stopped; but the employee remains "Active".
New Position Request	Create a brand new position for the department.

New Appointment Forms Workflow

New Assignment



Add a New Faculty Contract



New Position Request Workflow



Change Forms

eForm Title	Purpose
Modify Position	Change the attributes on a vacant or filled position, e.g. Reports To change, reorganization, reclassification, inactivate/activate a position, transfer a position etc.
Add Additional Pay	Request payment outside of an employee's base salary, e.g. Supplement, awards, special assignment, etc.
Pay Rate Change	Request an approved salary adjustment for an employee, e.g. equity, promotion, etc.
Position Funding Change	Update position funding and/or the allocation of funding.
Transfer Within Institution	Transfer an employee from one position to another within the same department or institution. (To be completed by the receiving department. Search match will likely need to be used due to security constraints)

Change Forms Workflow

Modify Position Workflow



Pay Rate Change Workflow



Additional Pay Workflow



Funding Change Workflow



Transfer Within Institution Workflow



End Forms

eForm Title	Purpose
End Assignment	End a single or multiple assignments for an employee, e.g. student, non-tenured faculty, etc.
Employee Retirement	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	End an employee's employment with the University. This eform will terminate all existing job records for the employee.

End Forms Workflow

Termination, End Assignment, and Retirement Workflow



LOA Forms

Form Title	Purpose
Leave of Absence Request	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	Return an employee form a paid or unpaid leave of absence.
Leave	

LOA Forms Workflow

Leave of Absence Request & Return Employee from Leave Workflow



Reports and Queries

Query Viewer is used to view data, i.e. position information, in a report format. This page allows you to search for an existing query, download the results to Microsoft Excel, and/or print a query.

- Begin by navigating to: NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
- 2. The **Query Viewer** search page is displayed. The recommended search method is by **Query Name** or **Description**.
- 3. Enter the search parameter in the appropriate field.
- 4. Click Search.
- 5. The query is displayed in a **Search Results** table. To view the results of the query, click the appropriate link.
 - The HTML link is used to run a query and display the results in a new browser window.
 - The Excel link is used to download the result of the query to Microsoft Excel.

Available Reports and Queries

Description	Navigation
Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Filled Position List	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Permanent Budgeted Positions	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Positions Not Funded	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Job Data by Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Position Profile by Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Vacant or LOA Position List	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
SICK/VAC	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Reports To Information	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Vacant or LOA Position List	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
VAC/SICK Leave by Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Positions Funded including Vacant	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
Funded & Filled; No Vacant	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
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.
	DescriptionPermanent Budgeted PositionsFilled Position ListPermanent Budgeted PositionsPermanent Budgeted PositionsPositions Not FundedJob Data by DepartmentPosition Profile by DepartmentVacant or LOA Position ListSICK/VACReports To InformationVacant or LOA Position ListVAC/SICK Leave by DepartmentPositions Funded including VacantFunded & Filled; No VacantProvides salary and benefitinformation for all employeesassociated with a specific department.It contains information such as thefunding source, longevity pay,premium sharing, etc.

Resource Information

Policy & Procedures

Policies, Procedures and Official University forms are located at: <u>https://www.uta.edu/policy</u>

For more information on Position Management and Workforce Management refer to the following:

- Procedures HR-E-PR2
 - Classification and Allocation of Positions
- Procedures HR-E-PR3
 - Salary Administration Classified Service
- Procedures HR-E-PR10
 - Employee Separation and Clearance process
- Procedures BF-P-PR7
 - Accrued Vacation, Sick Leave, Death Benefits, Excessive Absences, and Mid-Month Terminations