UNIVERSITY OF TEXAS ARLINGTON

KNOWLEDGE SERVICES

Position and Workforce Management

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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.

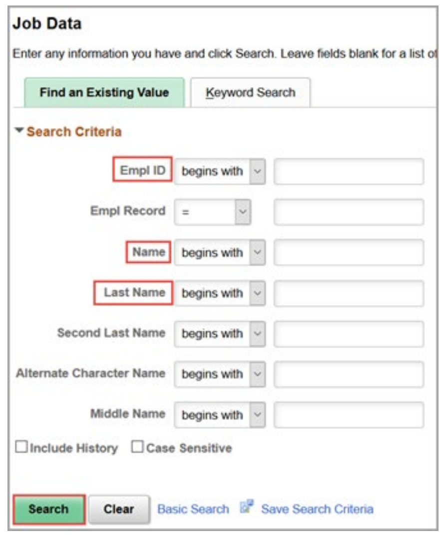
Review Position and Job Data

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

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

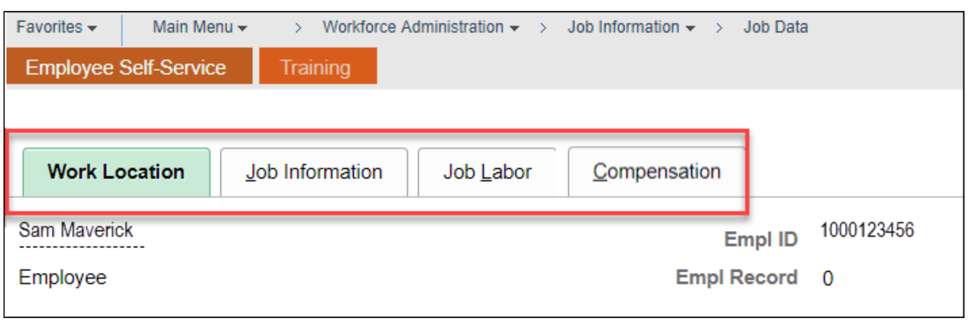
View Job Data

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**
2. 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

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

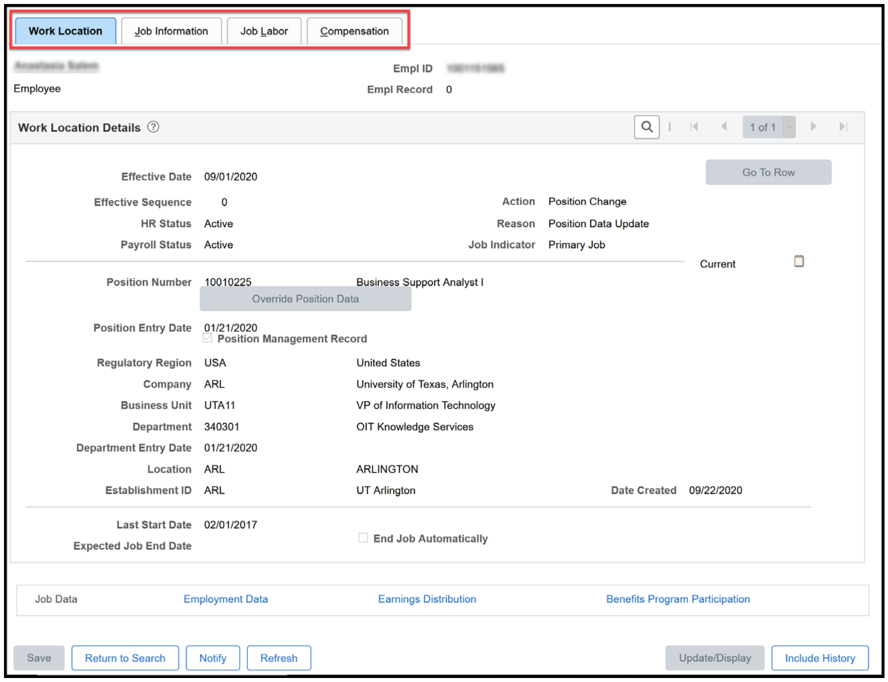


The **Work Location** page shows the overall job data. It shows the Effective Date of the current job record, the Position number, Position entry date, Company, Business Unit, Department, Location, etc.

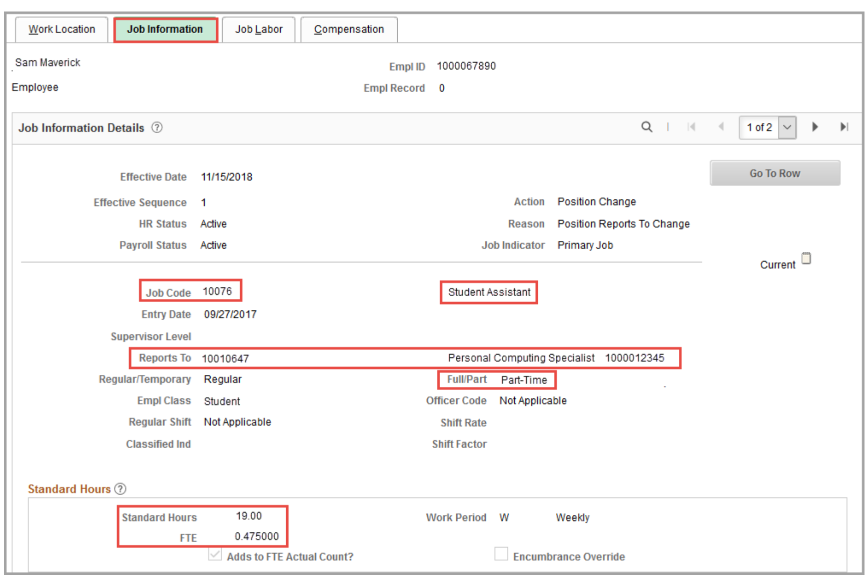
This page also shows an employee's start date, status, the effective date of the current record, and the actions/reasons that this record was entered.

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.

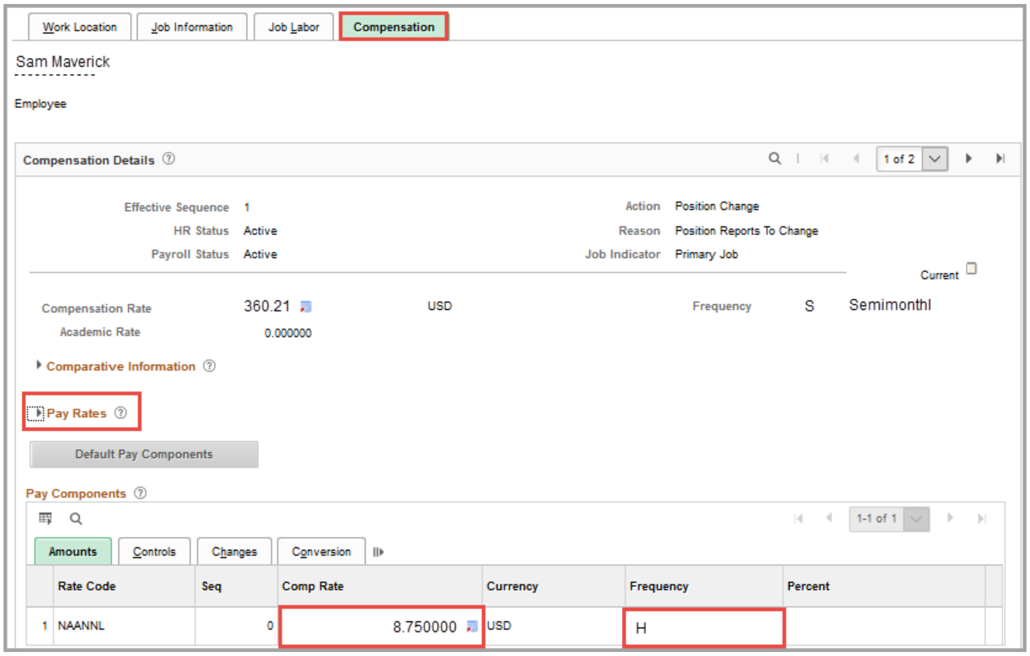


The **Job Information** page is used to view job code, job title, and Reports To information. Also, it provides part-time/full-time status, hours per week, and FTE (Full-Time Equivalent) information.

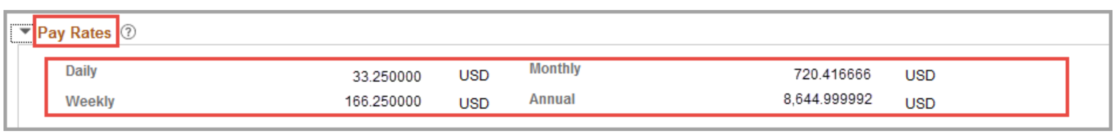


Note: The Job Labor page is not used at UT Arlington

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



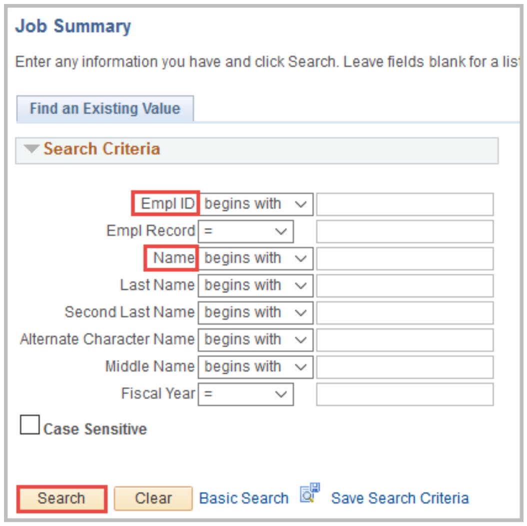
The **Pay Rates** section displays an employee's *Daily*, *Weekly*, *Monthly*, and *Annual* pay rate. To view the pay rates, click the expand arrow to open the section.



View Job Summary

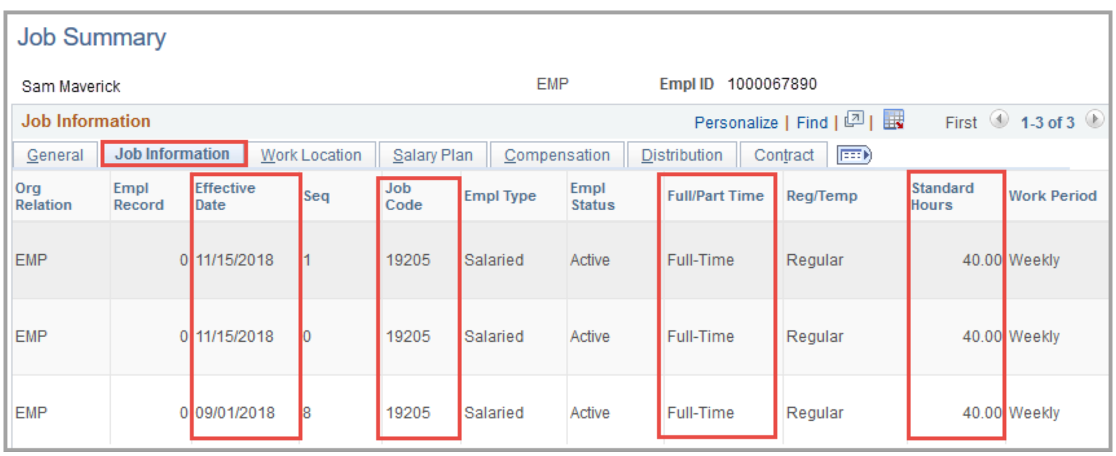
The Job Summary page displays tabled job history by fiscal year for an incumbent. This page provides historical data such as job code, position number, Reports To, salary information, e.g. daily, weekly, monthly, and annual pay rate, and funding information.

1. 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 **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.

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 Summary

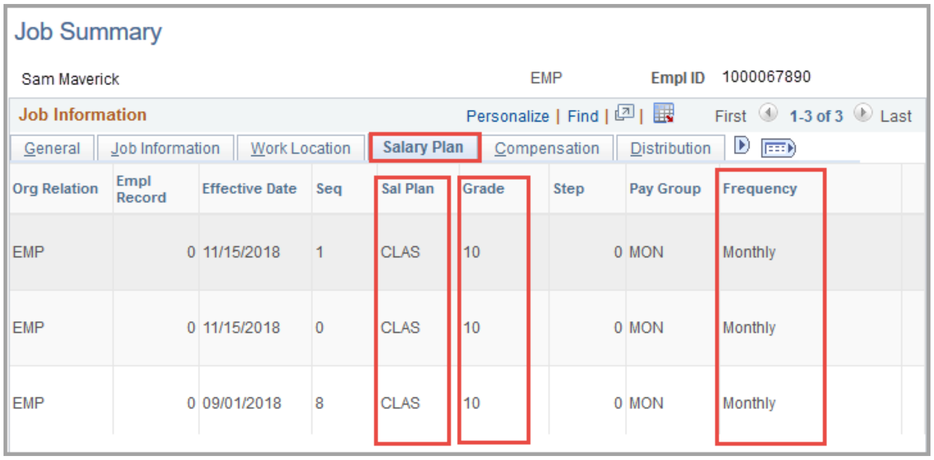
Sam Maverick EMP Empl ID 1000067890

Job Information Personalize | Find | First 1-3 of 3

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
EMP	0	09/01/2018	8	19205	Salaried	Active	Full-Time	Regular	40.00	Weekly

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



Job Summary

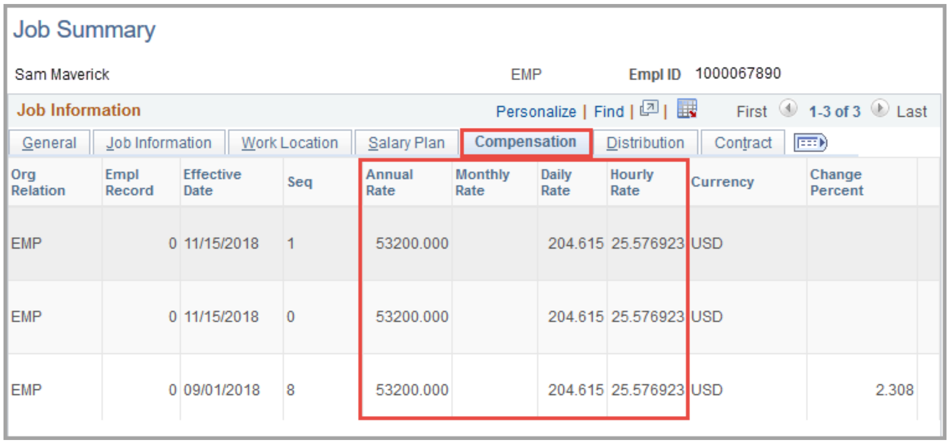
Sam Maverick EMP Empl ID 1000067890

Job Information Personalize | Find | First 1-3 of 3 Last

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

Org Relation	Empl Record	Effective Date	Seq	Sal Plan	Grade	Step	Pay Group	Frequency
EMP	0	11/15/2018	1	CLAS	10	0	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 **Compensation** tab provides the employee's compensation rate history such as annual, monthly, daily, and hourly rate of pay.



Job Summary

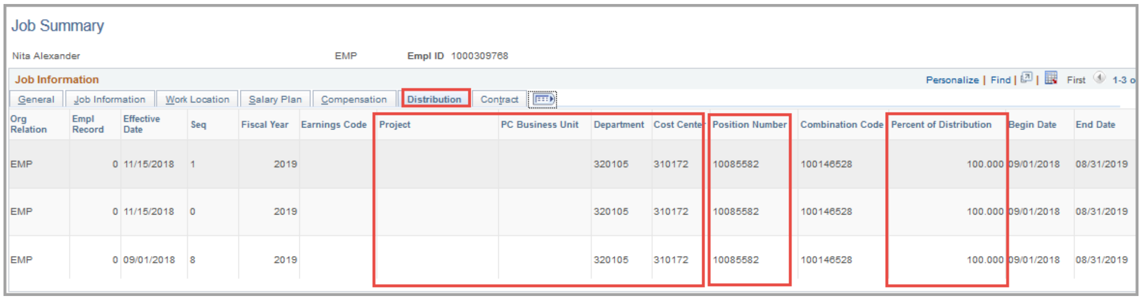
Sam Maverick EMP Empl ID 1000067890

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	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 Summary

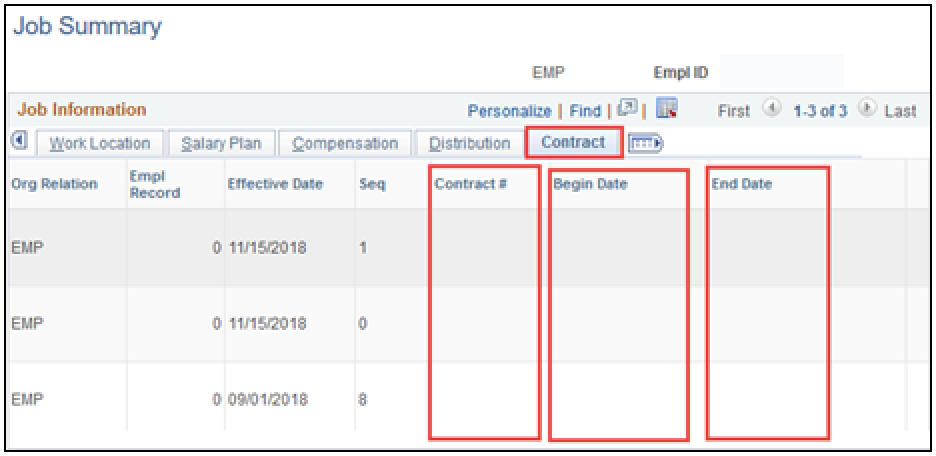
Nita Alexander EMP Empl ID 1000309768

Job Information Personalize | Find | First 1-3 o

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

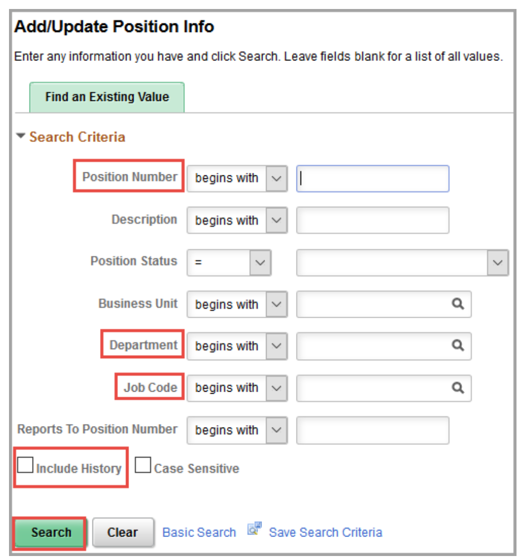
Org Relation	Empl Record	Effective Date	Seq	Fiscal Year	Earnings Code	Project	PC Business Unit	Department	Cost Center	Position Number	Combination Code	Percent of Distribution	Begin Date	End Date
EMP	0	11/15/2018	1	2019				320105	310172	10085582	100146528	100.000	09/01/2018	08/31/2019
EMP	0	11/15/2018	0	2019				320105	310172	10085582	100146528	100.000	09/01/2018	08/31/2019
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.



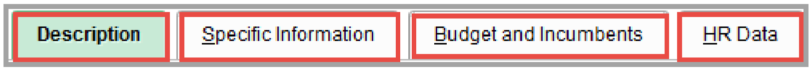
View Position Information

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.



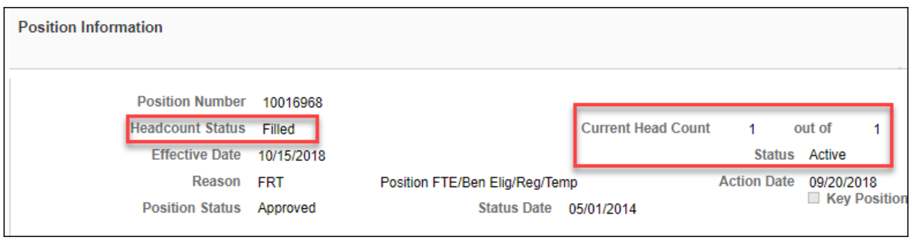
1. Navigate to: **NavBar > Menu > HRMS > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info**.
2. The **Position Information** search page is displayed. This page provides several options for performing a search. The most common search method is by **Position Number**, **Department**, or **Job Code**.
3. 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.

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

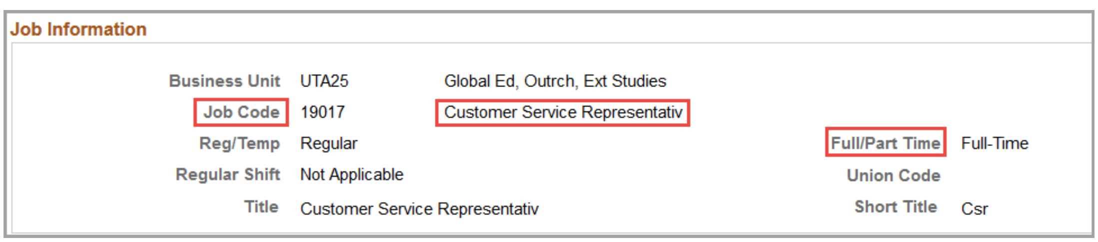


The **Description** tab is broken into four sections: Position Information, Job Information, Work Location, and Salary Plan Information. This section will display the overall attributes of the position itself including status, headcount, effective date, etc.

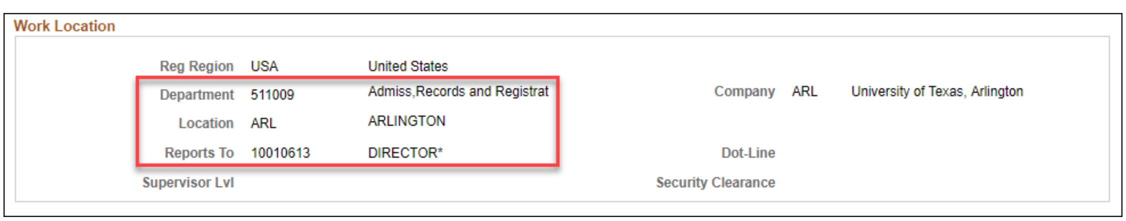
The **Position Information** section provides the position number, the current maximum headcount for the position, the actual head count, the effective date of the position, the status of the position, and the status date.



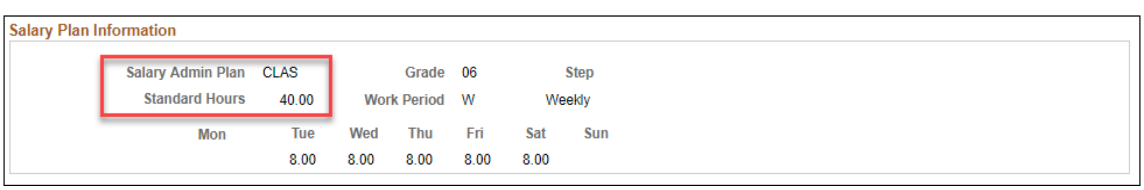
The **Job Information** section provides the job code, title, and the part-time/full-time status for the position.



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.

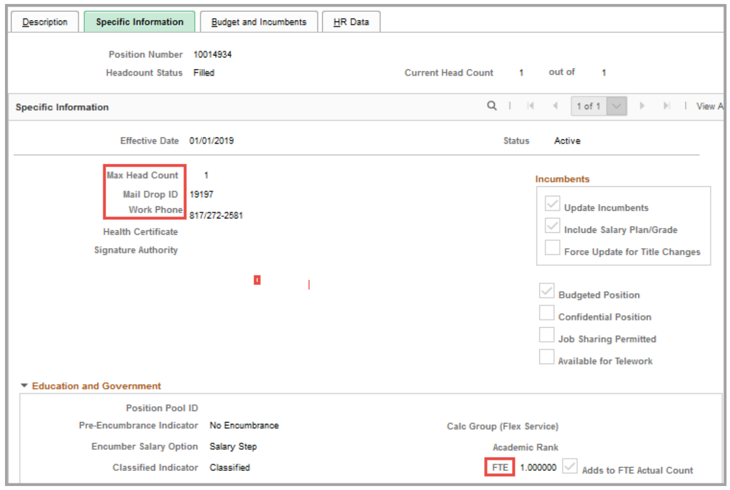


The **Salary Plan** section provides the salary class and hours per week for the position.

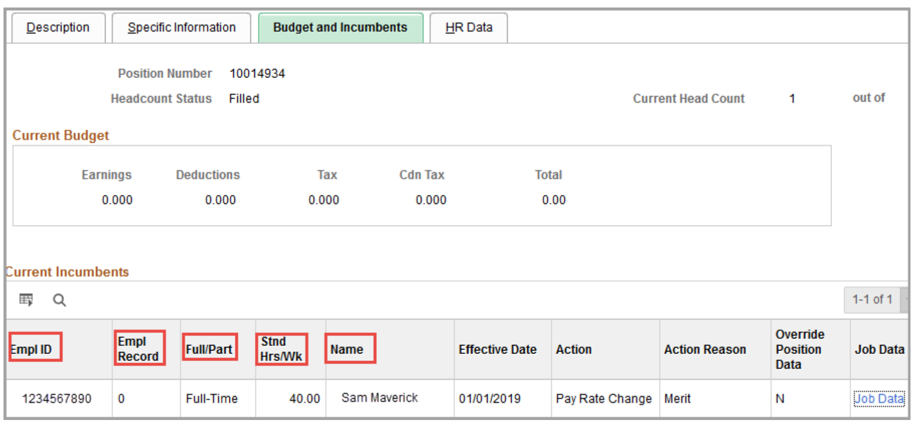


The **Specific Information** tab displays the current and maximum head count for the position, the PO Box number, and work phone number where the position is located. Also, this page provides FTE (Full-Time Equivalent) information.

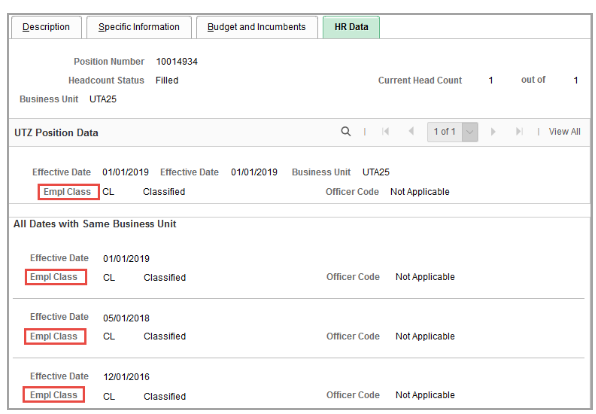
The FTE value is used to calculate the budget for the position e.g. 100%=1.0, 75%=.75, 50%=.50.



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).



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

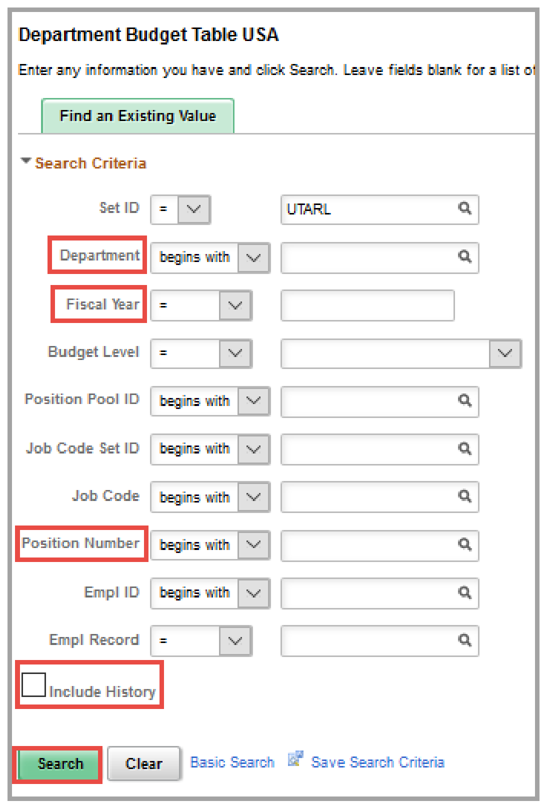


View Position Funding

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).

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

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.



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 Defaults	Dept Budget Earnings	Dept Budget Deductions	>

(Page 2)

<	Dept Budget Earnings	Dept Budget Deductions	Dept Budget Taxes	Budgetary Funding

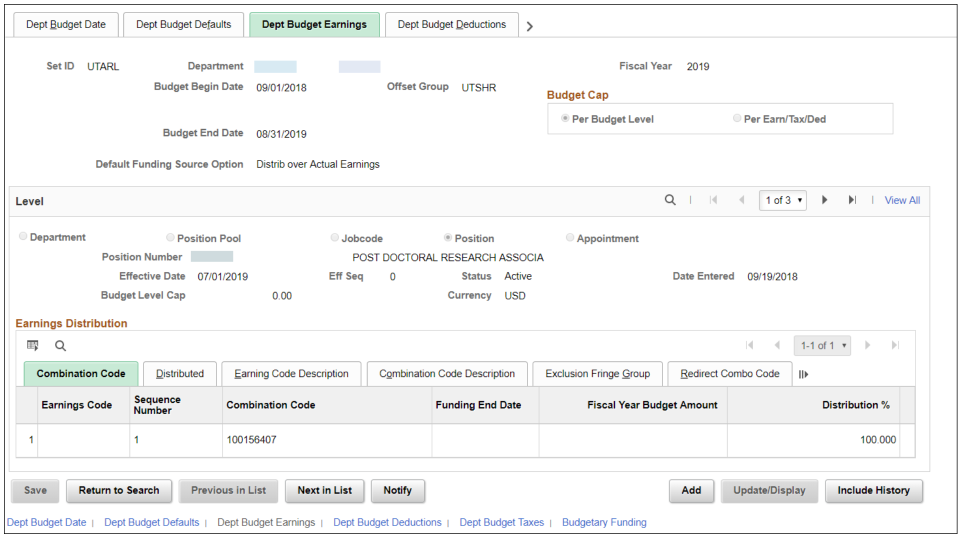
NOTE: The “**>**” and “**<**” allow moving from page one to page two of the tabs.

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

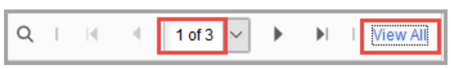
- The **Department Budget Earnings** page is used to view the chartfield values to fund the position.
- The **Budgetary Funding** page is used to view the incumbent(s) assigned to the position (if filled).

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

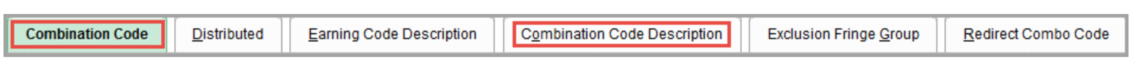
- The top section of this page provides the department name and the fiscal year for the position budget. In addition, this section displays the beginning and ending dates for the budget period.
- The middle section provides the position number and the title associated with the position. Also, it displays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



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.



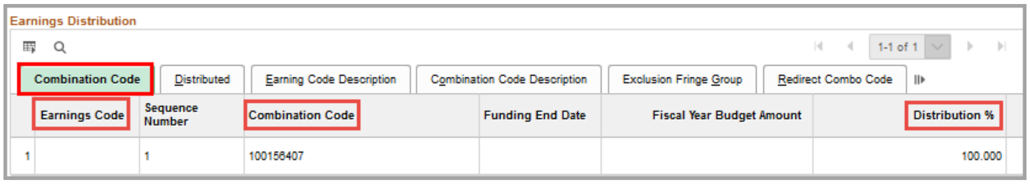
The **Earnings Distribution** grid consists of five tabs. Departments will use the **Combination Code** tab and/or the **Combination Code Description** tab to obtain information.



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%.



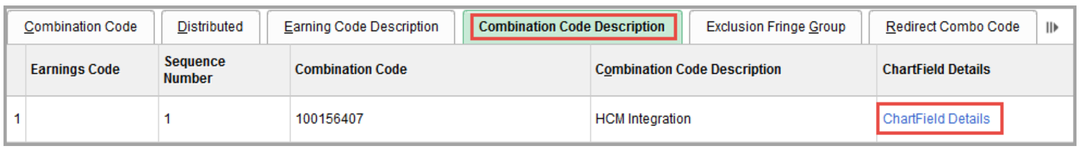
Earnings Distribution

Combination Code | Distributed | Earning Code Description | Combination Code Description | Exclusion Fringe Group | Redirect Combo Code

1-1 of 1

	Earnings Code	Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1		1	100156407			100.000

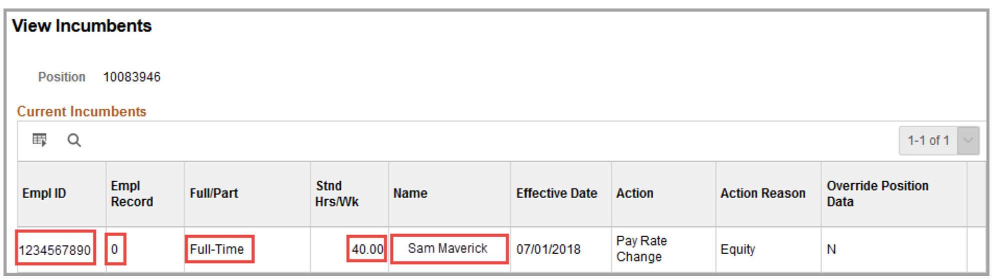
The **Combination Code Description** tab displays the funding source(s) for the position.   The **ChartField Details** link displays the budget information.



Combination Code | Distributed | Earning Code Description | Combination 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 Incumbents

Position 10083946

Current Incumbents

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	N

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
- 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

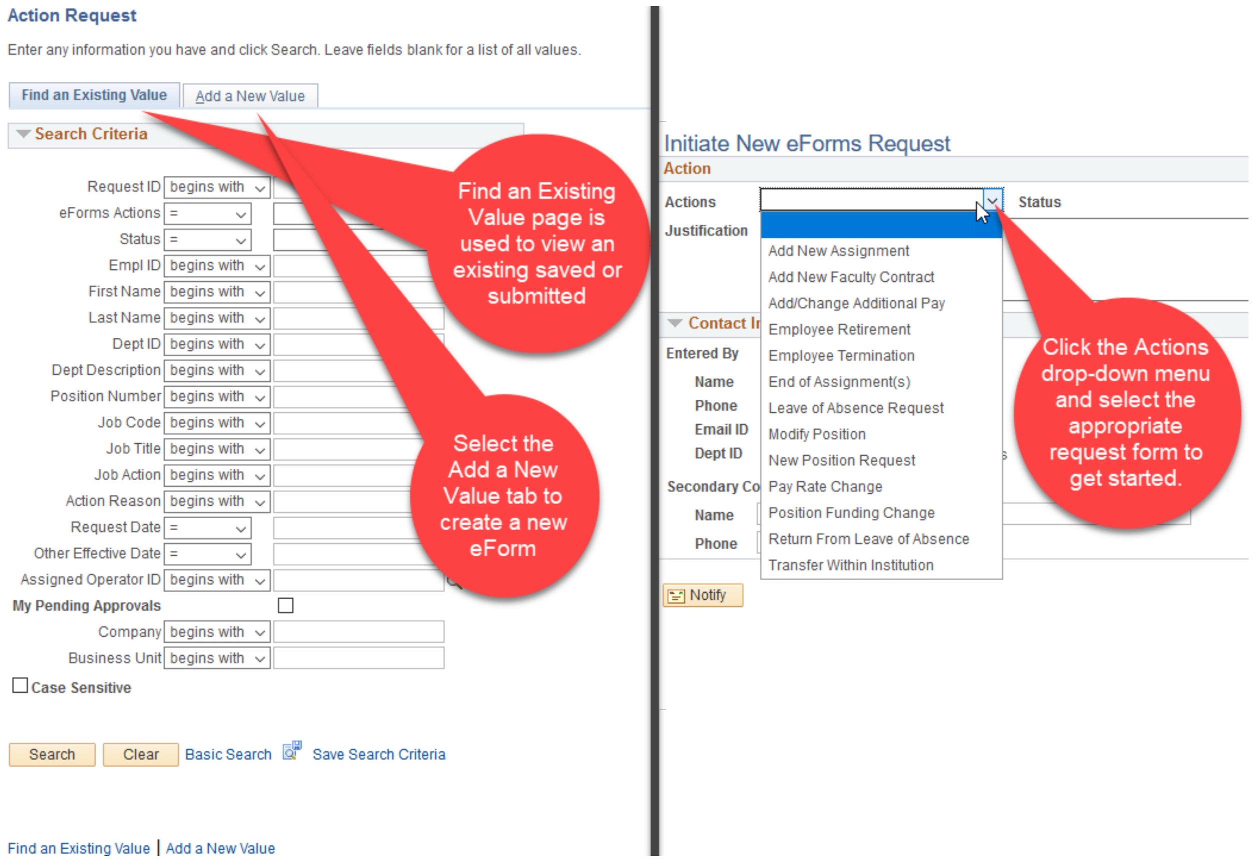
End Forms
- Employee Retirement
- Employee Termination
- End Assignment

LOA Forms
- Leave of Absence Request
- Return Employee From Leave

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

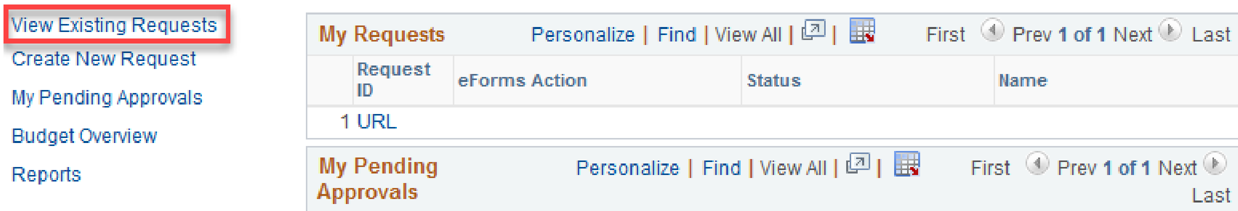
Requesters will receive an email notification when the eForm has been sent back (returned), denied (canceled) or approved.

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)

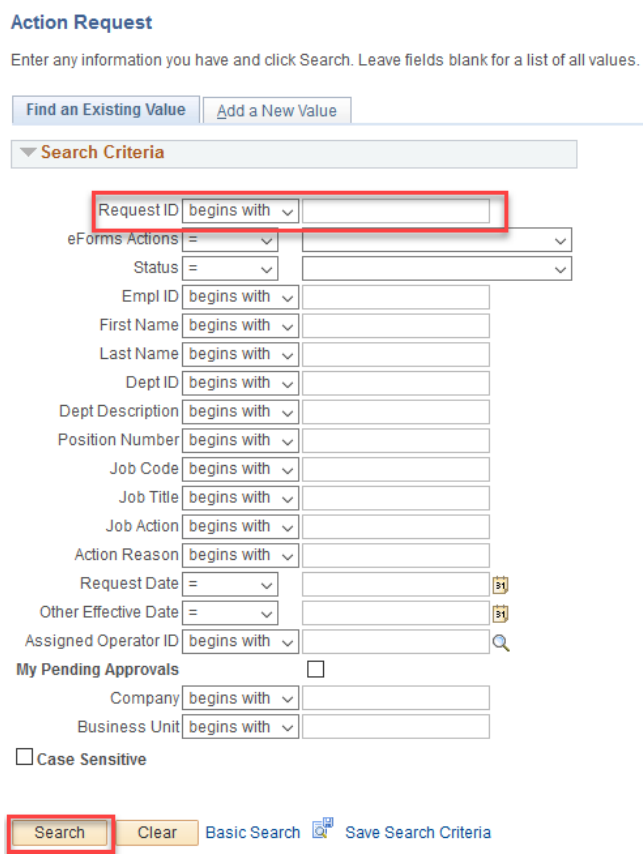
Option 1 – Using the eForms Pagelet

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



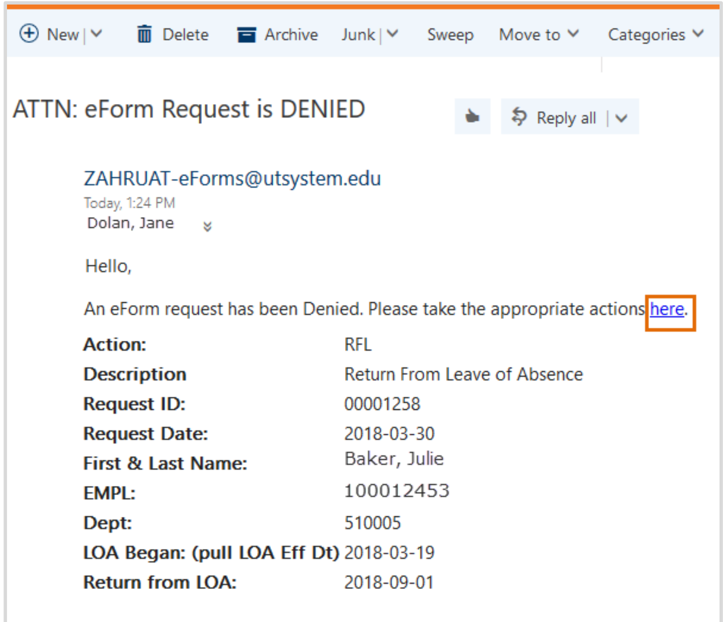
Option 2 – Using Action Request Menu

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.



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 from using the email link.
2. 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.



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)

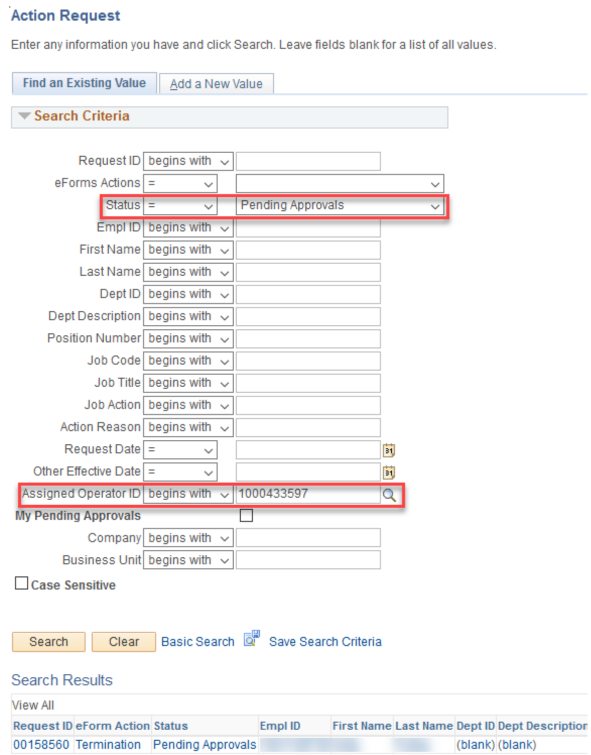
Option 1 – Using the eForms Pagelet

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

Option 2 – Using Action Request Menu

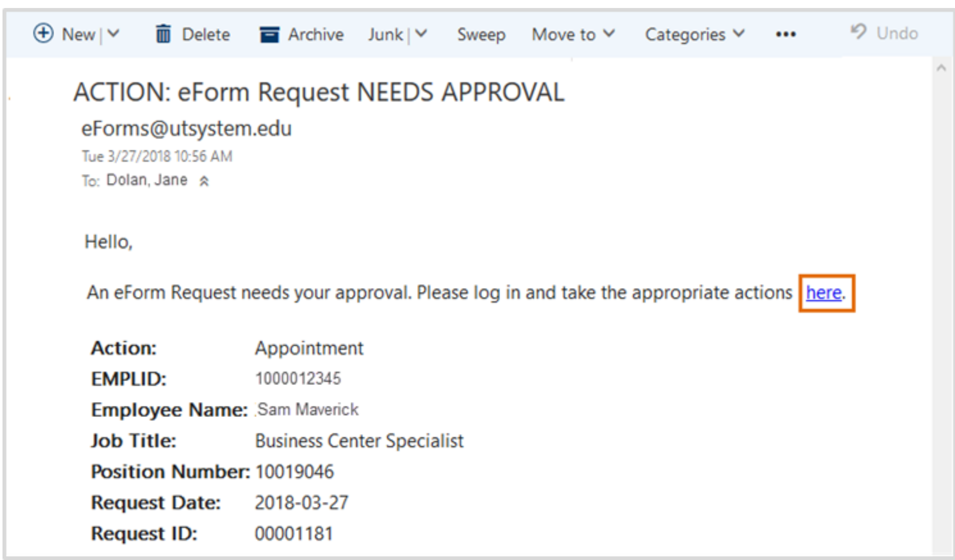
1. Navigate to **NavBar > Menu> HRMS > UTZ Customizations > eForms HR/Payroll Actions > My Pending Approvals**
2. Select "**Pending Approvals**" from the **Status** field.
3. If necessary, enter your Empl ID in the "Assigned Operator ID" field and click **Search**.
4. Select the appropriate eForm from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

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



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

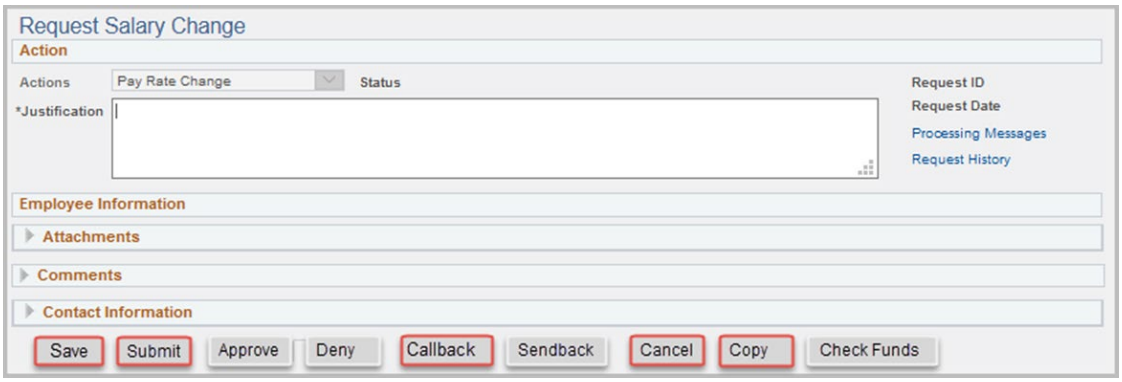
1. Select the link provided in the email message. Note: Some users have experienced issues connecting to the workflow form using the email link.
2. If you are already logged into UT Share, you will be directed to the eForm page. If not, you will be prompted to provide your login credentials, and then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



Action Buttons

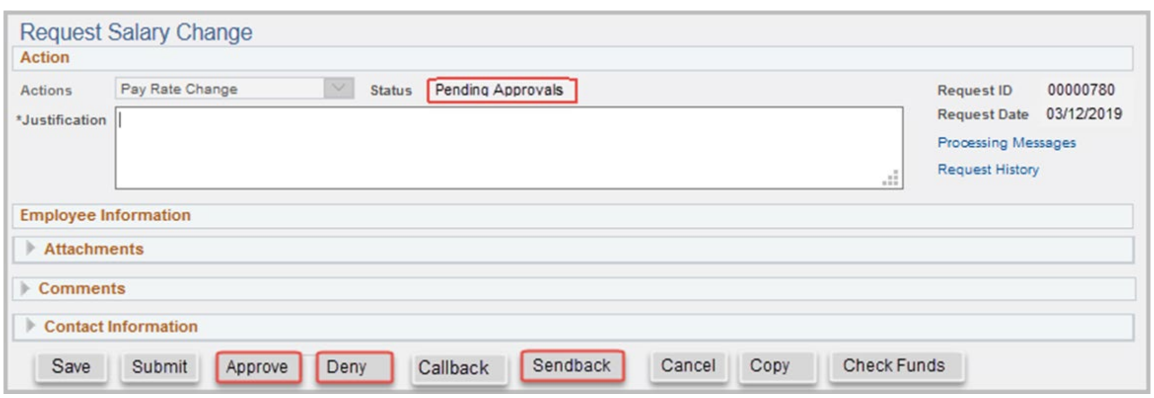
Requesters Action Buttons

- **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



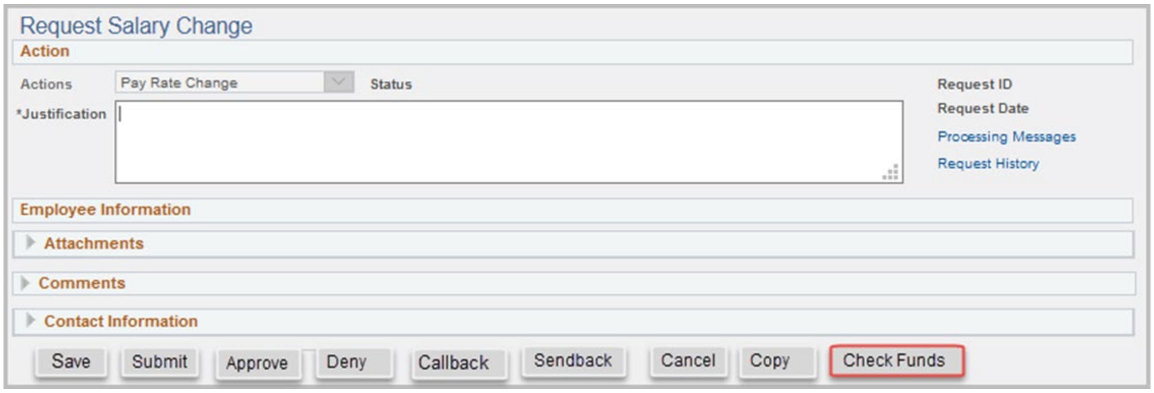
Approvers Action Buttons

- **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.

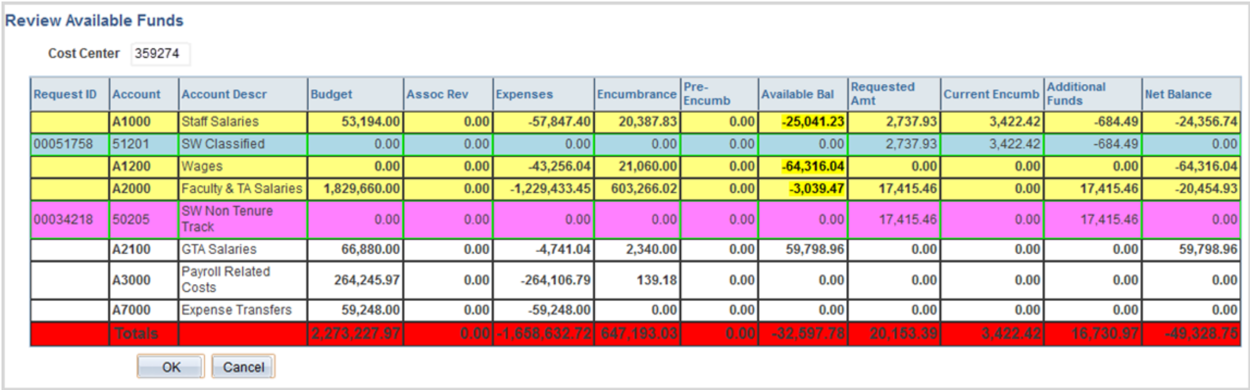


Check Funds Action Button

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.



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

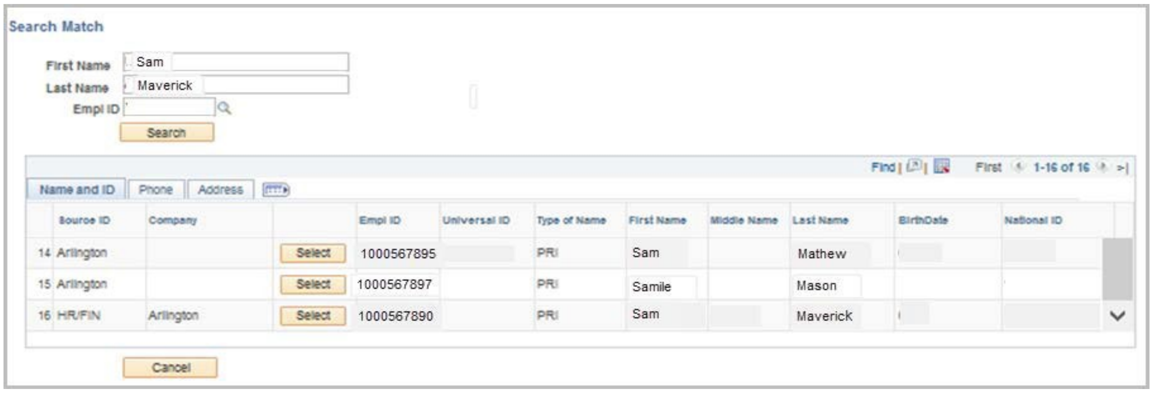
- **Blue** = the current eForm request
- **Pink** = other pending eForm requests
- Yellow = the budgetary account line is overdrawn (e.g. A1200)
- **Red** = overall budget is overdrawn

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.

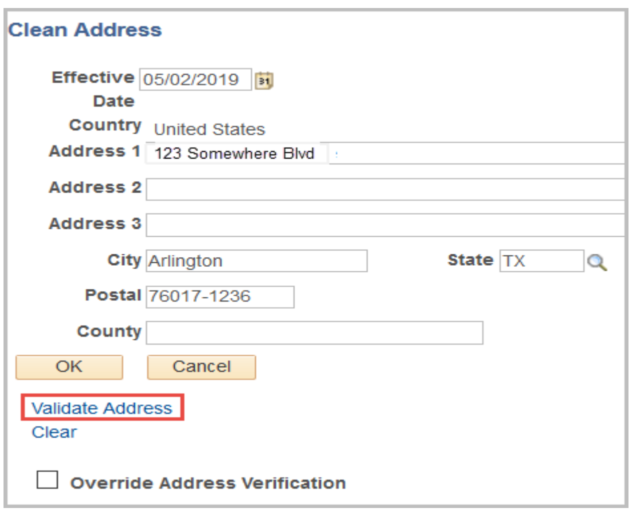
Search Match

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.



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.



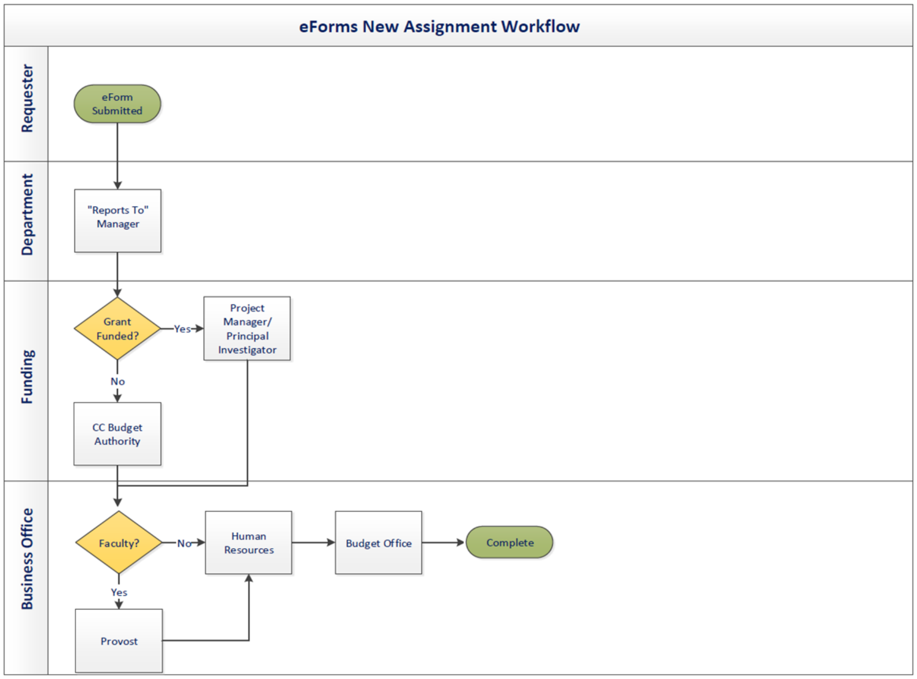
eForms

New Appointment Forms

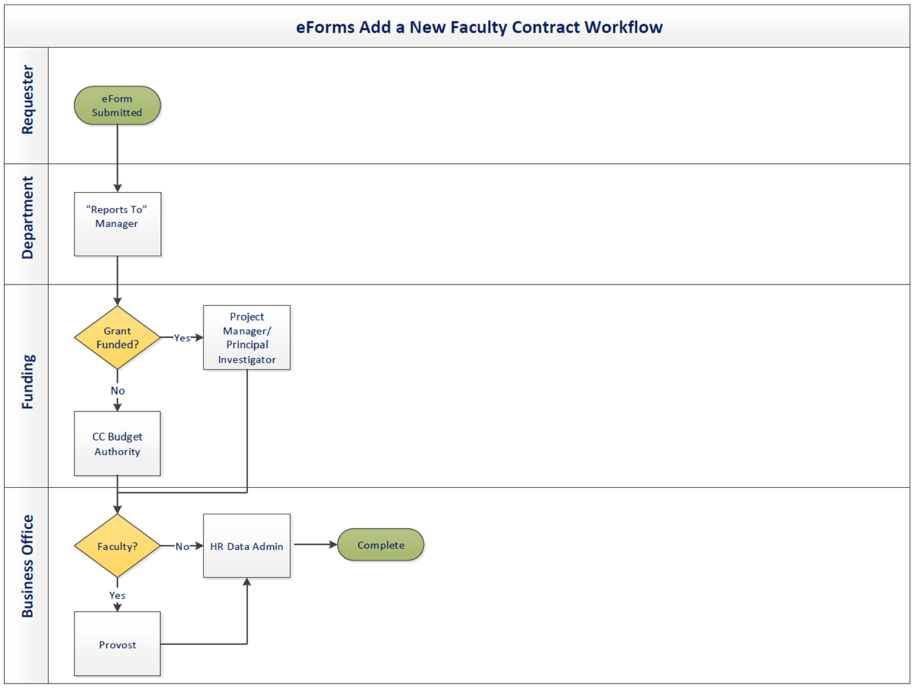
eForm Title	Purpose
Add New Assignment	Assign an incumbent into a position, e.g. new hires and rehires.
Add New Faculty Contract	Create a new contract or update an existing contract. Contracts are used to pay Faculty salary or contracted amount within a specified date range. Once the contracted amount 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

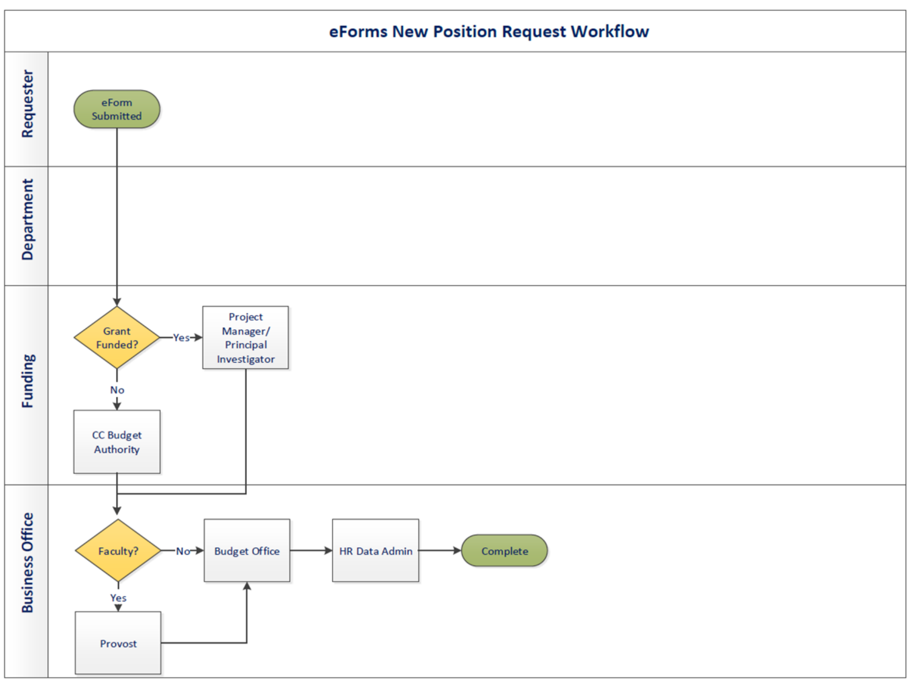
New Assignment



Add a New Faculty Contract



New Position Request Workflow

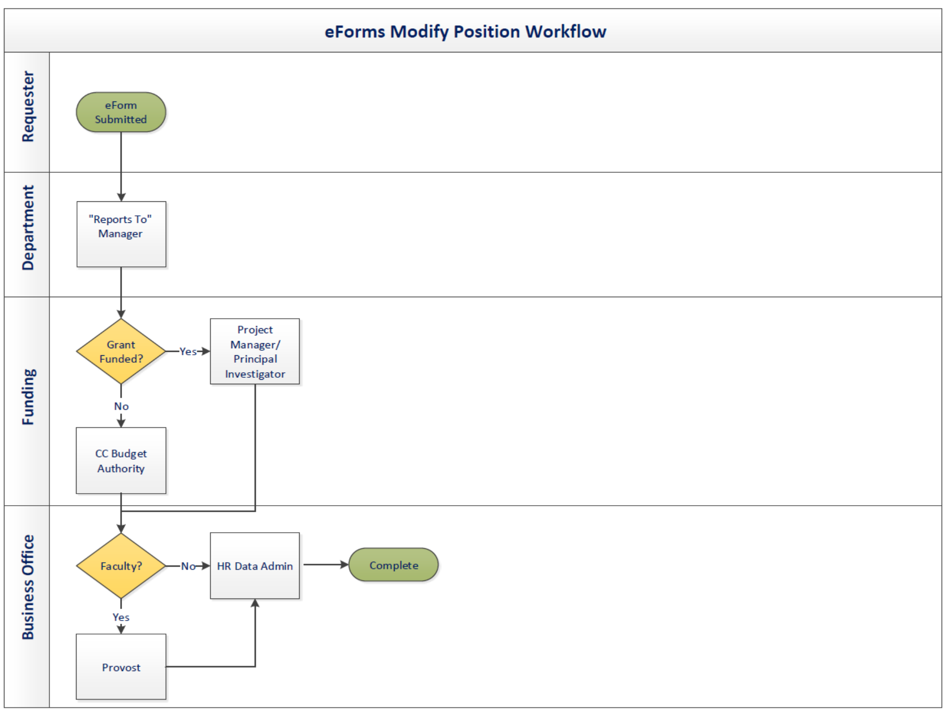


Change Forms

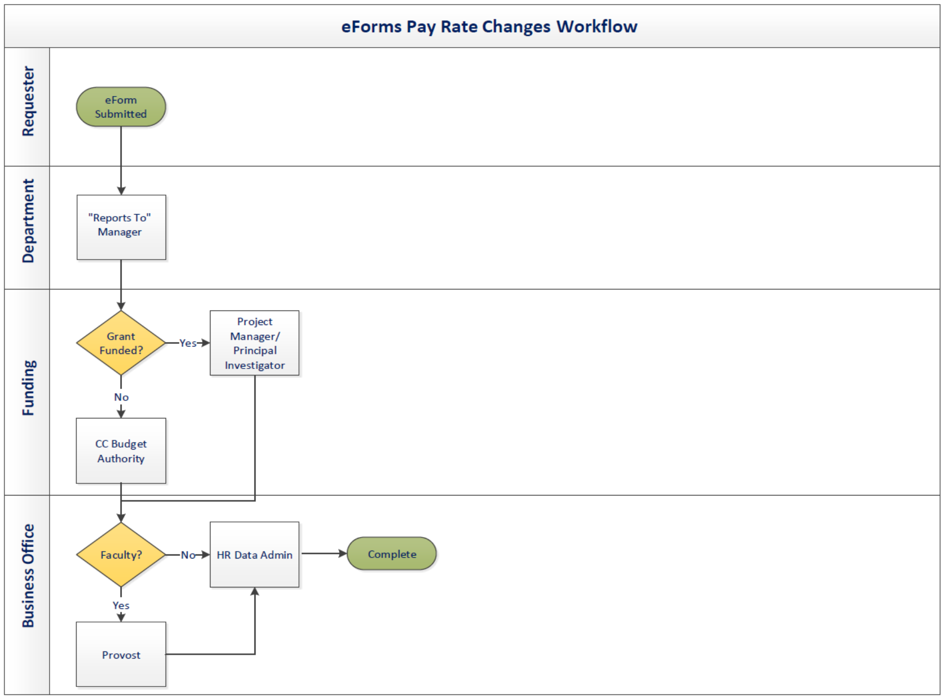
eForm Title	Purpose
Modify Position	Change the attributes on a vacant or filled position, e.g. Reports To change, reorganization, reclassification, inactivate/activate a position, transfer a position etc.
Add Additional Pay	Request payment outside of an employee's base salary, e.g. Supplement, awards, 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

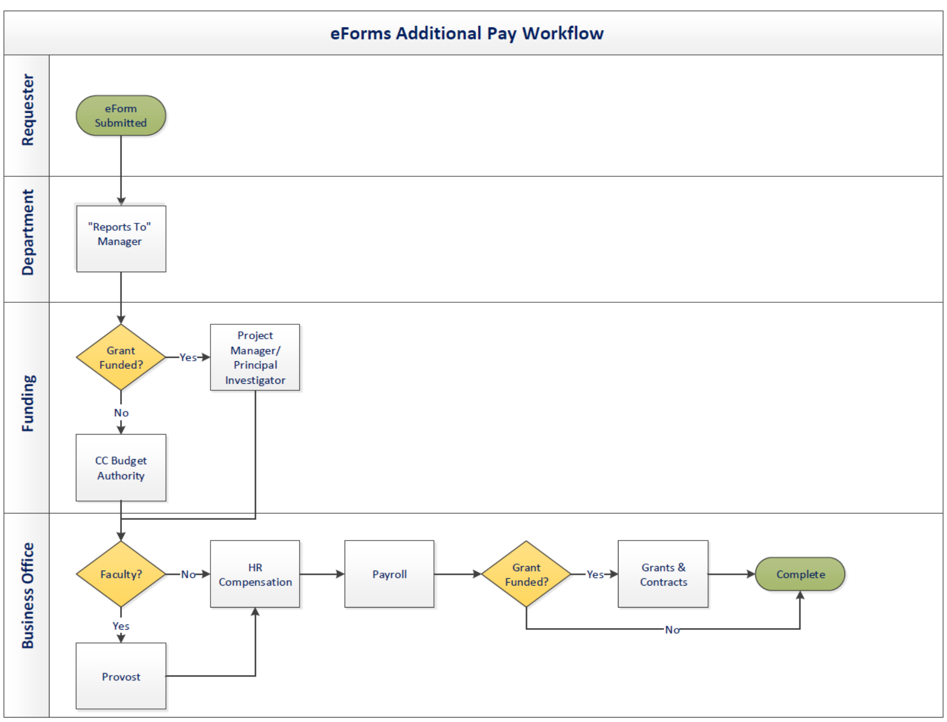
Modify Position Workflow



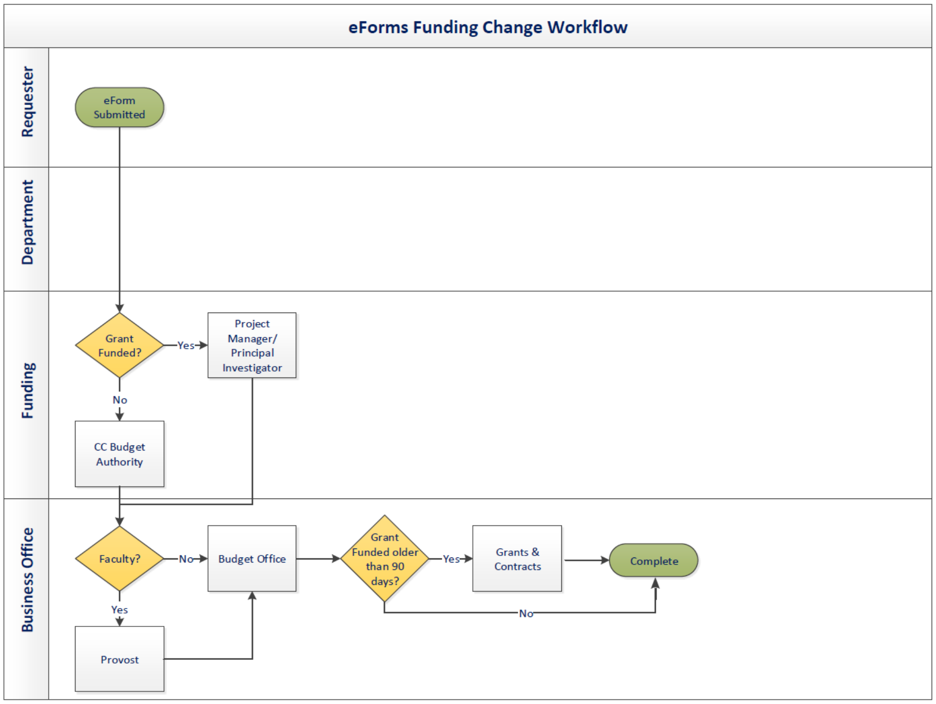
Pay Rate Change Workflow



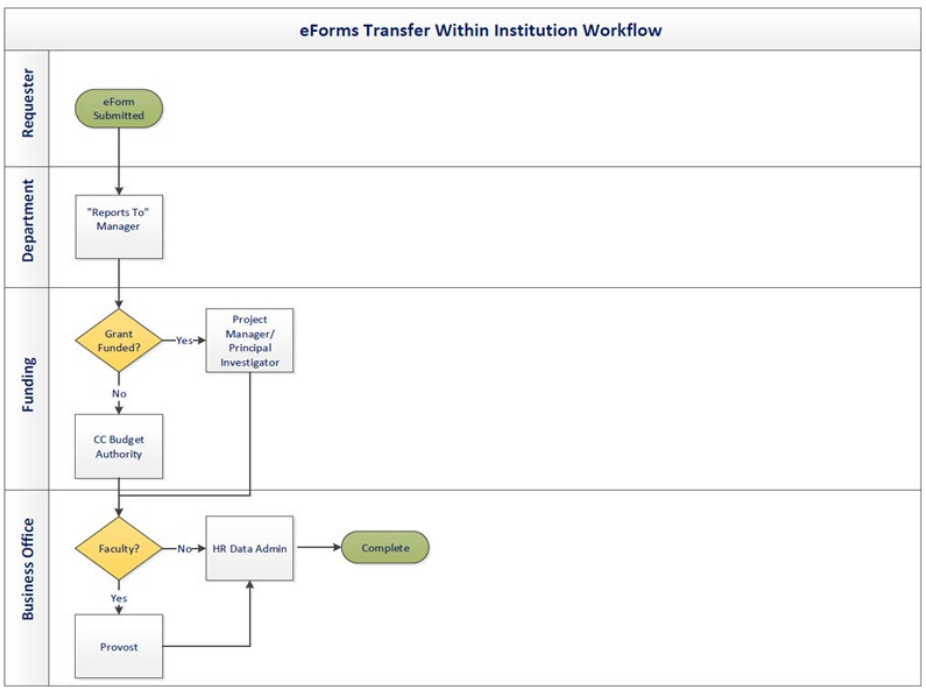
Additional Pay Workflow



Funding Change Workflow



Transfer Within Institution Workflow

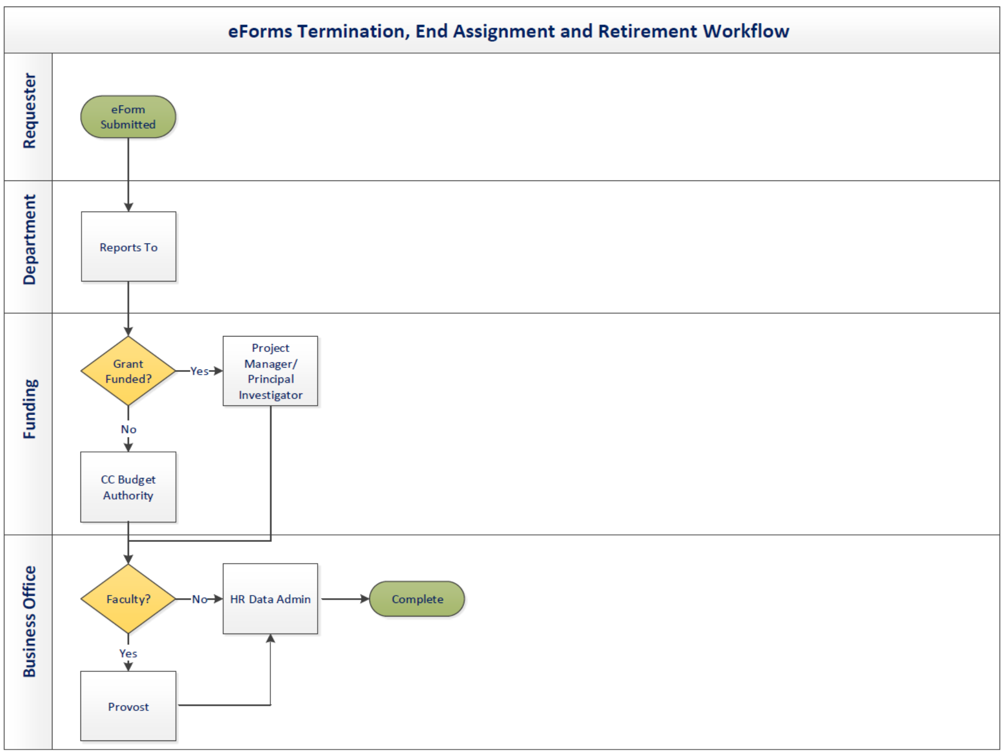


End Forms

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

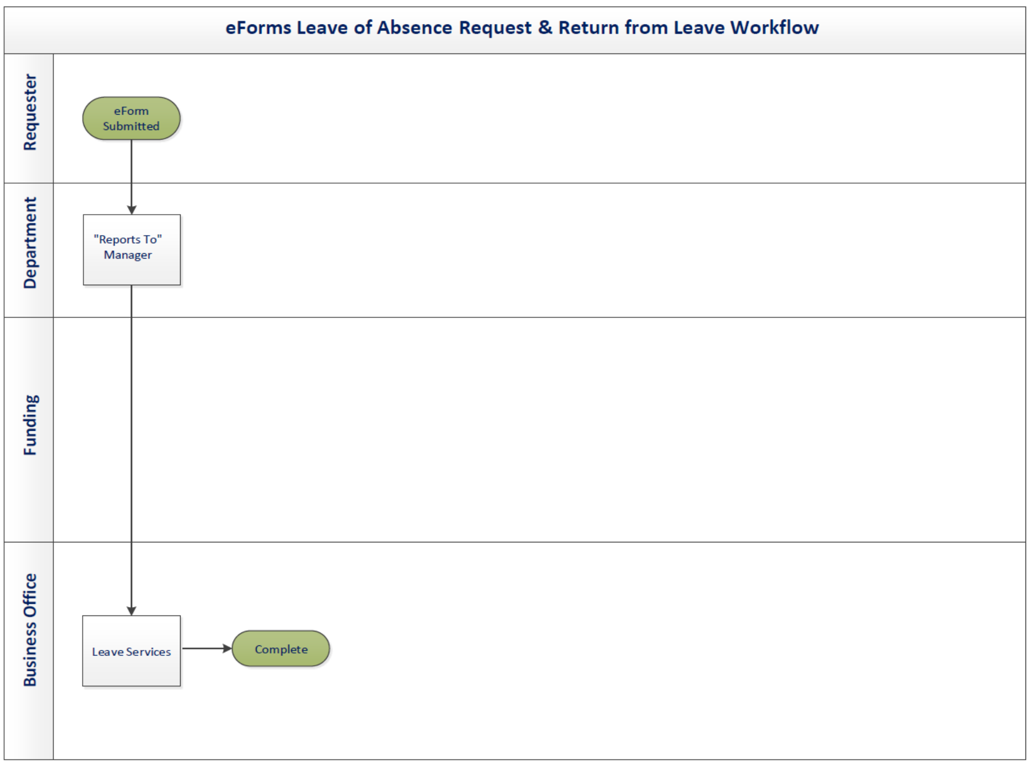


LOA Forms

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 Leave	Return an employee form a paid or unpaid leave of absence.

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.

1. 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

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 Department	NavBar > Menu > HRMS > Reporting Tools > Query > Query Viewer
UTZ_CA_POSITIONS_FUNDED_DBT	Positions Funded including 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.

Resource Information

Policy & Procedures

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

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