eForms
Your Automated HR Solution is Here!

Office of Human Resources

March 28, 2018

Presented by Ron Golenski
Director, HR Information Technology Operations

www.utsa.edu/bussvc
Agenda

• What is eForms?
• Who will use eForms?
• How does this change funding?
• How do eForms work?
• How will eForms be rolled out?
• Where can you find additional information?
• Q&A
What is eForms?

• **eForms** is an enhancement to our current PeopleSoft HR/Payroll system to communicate various Human Resource/Financial actions from departments to Human Resources, Payroll, and/or Budget & Financial Planning.

• **eForms** streamlines the entire process for completing and approving organizational, personnel and payroll funding actions.

• This solution allows you, the departments, to create electronic forms within PeopleSoft that support Capturing Data, Approval Routing, Updating Data, Auditing, and Reporting.
What is eForms?

- Electronic tracking & approvals
- Quicker processing
- Eliminate SharePoint Interim Forms
- Improved Transparency
- eForms Benefits
- Streamlined process
- Improved DBT Process Replacement

Office of Human Resources
What is eForms?

eForms replaces the following SharePoint forms:

- Create Benefits Eligible Position Form
- Pay Rate Change Request Form
- Benefits Eligible Reclassification Request Form
- Salary Supplement Request Form
- Create Non-Benefits Eligible Position Form
- Hire/Rehire Request Form
- Modify Position Form
- Faculty Contract Request Form
- Payroll – Supplemental Pay (Additional Pay)
What is eForms?

**eForm Action Types**

**New (Appt) Package:**
- New Employee Form
- New Appointment Form
- New Contract Form
- New Position Form

**Ending Package:**
- Terminations Form
- Retirement Form
- End Additional Appointment Form
- Leave of Absence & Return Form

**Changes Package:**
- Changes Funding Form
- Position Attribute Change (PAC) Form
- Additional Pay Form
- Job Attribute Change (JAC) Form
- Transfers, Change of Position Form
What is eForms?

- eForms replaces the process (Position Management System) used to update the Department Budget Table (DBT)
How does this change funding?

• Position funding (DBT) is built into almost every document.
• eForms eliminates separate funding document processing, only one document is necessary instead of two.
• eForms creators require familiarity with both the functional and funding aspects associated with the transactions. Currently, these tasks may be completed by two separate individuals.
  • Opportunity for office efficiency
How does this change funding?

- eForms displays current and proposed funding simultaneously for position or Supplementary Pay to the document requestor and downstream approvers.
- Intuitive and easy to use with lookups, edits and funding checks built into the forms to reduce errors.
- eForms document for “funding only changes,” option when no other changes to position, job, or pay data.
- eForms will validate that funding is available for the action and funding that is proposed. This is important as it helps you insure you not exceeding your budgets when processing an eForm action.
Who will use eForms?

**Requesters:**
- Department users with the ability to **create** new requests and **view** existing saved or submitted eForms.

**Approvers:**
- Department heads, managers, funding authority and those above the department level (AVP, Dean level) are able to **view** and **approve** submitted eForms or search/view existing eForms.

**Back Office Approver:**
- Processing office staff who have the ability to **view**, **approve** and **edit** submitted eForms (e.g., Human Resources, Budget Office, etc.)
How do eForms work?

Requester submits eForm → Department Approver → Budget Authority → Back Office → Approve → Process to PeopleSoft (BTU)

Efficient Accurate Automated
How will eForms be rolled out?

Human Resources will conduct classroom training for departmental users according to the tentative schedule below. Once you are trained, you are able to start using eForms!

April 9-13, 2018:
June 4-8, 2018:

VPER, VPCS, VPAA, COS, COA, AVP Student Success, Student Life, Student Services, OIT, International Initiatives, International Programs
How will eForms be rolled out?

Human Resources will conduct classroom training for departmental users according to the tentative schedule below. Once you are trained, you are able to start using eForms!

eForms Training

April 9-13, 2018

- College of Engineering
- Athletics
- Campus Recreation
- VPAFS
eForms Training
June 4-8, 2018

- VPER
- VPCS
- VPAA
- COS
- COA
- AVP Student Success
- Student Life

- Student Services
- OIT
- International Initiatives
- International Programs

Office of Human Resources
eForms Training
June 18-22, 2018

- VPBA
- President
- COPP
- COLFA
- University College

- Housing
- University Center
- Confucius Institute
- ESL Library

Office of Human Resources
eForms Training
July 9-13, 2018

• VPR
• VPSA
• COEHD
• COB
• Honors College
• Graduate School,
• Enrollment

• CAR
• Institutional Effectiveness,
• Office of Sustainability
• Online Cyber Institute
• Online Learning

Office of Human Resources
Need more Information?

**Introduction to eForms**
https://www.utsa.edu/hr/News/2017/06/eFormsIntroductionVideo.mp4

**Sample eForms**
https://drive.google.com/file/d/0B7MIJ80uO6hbUUp1V0xYakM0SUE/view
Q&A

Contact:
Ron Golenski
Director, HR Information Technology Operations
(210) 458-4255
Ronald.Golenski@utsa.edu
Thank You!

Your partner for successful solutions

www.utsa.edu/hr