eForms
Your Automated HR Solution is Here!
Eforms Overview
Day O.N.E.

• Retroactive actions in many cases cannot be completed in eforms
• Submit actions proactive up to 30 days in advance
• A process called the base table update (btu) has to be run for the eform to update PeopleSoft
• Once an employee/POI is terminated you cannot update actions to the record such as term date, salary, fte
• Day O.N.E will add comments to the eform if there are problems or issues
Eforms Overview
Day O.N.E

• Conduct the search match for hires and rehires
• Incorrect spellings of names, special characters, surnames, and incorrect social security numbers cause double identities
• Do not send actions for the same position or person at the same time
• Day ONE has to send forms back that cannot be edited or corrected (read the comments)
Eform Overview
Day O.N.E.

• Staff benefit eligible employees hired in STARS
  • Complete the Day O.N.E. form
  • Complete the appointment eform (new hire)
  • Transfer form (active employee moving to a new position)

• Send new employees to HR to complete their I-9s
  • Incorrect email addresses
Funding Reminders…

• No longer use the PMC process to update DBTs
• Ability to fully fund positions for entire fiscal year
• Estimated Expense amount is NOT encumbrance
• Check funds function looks at funding at a point in time - *Turned off for Work Study Students*
• Funding can be changed on the following forms:
  • Funding Change Form
  • Job Attribute Change (JAC)
  • Position Attribute Change (PAC)
Funding Reminders…

• Use Funding Change eForm for retroactive funding changes

• eForms “rules” protect against “stacking” funding on retro changes *(receive warning message)*

• Additional Pay on a position –
  • Funding section reflects **existing** additional pay
  • Additional Pay may be **current or expired** (old)
  • Routes to approvers for the additional pay line
  • Department should **remove old** additional pay earn codes using Funding Change eForm

Budget and Financial Planning
Funding Reminders…

• Funding end dates should follow these rules:
  • Cost Centers – should equal job end date or be left blank
  • Project/Grants – should equal project/grant end date or earlier

*Note: Do NOT adjust funding end dates as “work-around” for insufficient funding. Contact budget@utsa.edu for assistance.*
Funding...what’s to come...

**Enhancements:**
- Add Check Funds function to Additional Pay eForm
- Add ability to change funding source on Additional Pay using Additional Pay eForm (*currently use Funding Change eForm*)

**Discussion:**
- Budgeting for GRA/GTA positions
- Positions funded using carry forward (non-recurring)

**Fixes:**
- Budget checking against two fiscal years
- Hourly student positions over-estimating the expense
Payroll Management Services

E-Forms
Additional Pay
Additional Pay E-Forms

- Additional Pay eforms is scheduled to go live November 1st, 2018.
- The Additional Pay eForm may be used to request to add Additional Pay for an employee. You may also change or cancel an existing Additional Pay for an employee.
- Additional Pay payments may be used for the following:
  - Supplements
  - Awards
  - Special Assignments (Proctoring, Athletes Camp etc.)
  - Allowances (cell phone, parking, vehicle, Housing etc.)
  - Temporary Duties
  - On-call Pay, Call Back Pay, etc.
  - Bonuses (Applicable to Athletes only)
  - Overload Temporary
Additional Pay E-Forms Attachments and Comments

• In this section you will be able to attach required documentation and include any special comments that supports the requested transaction.

• Example of documents to attach are Communication Device Allowance forms, Offer letters for Relocation Reimbursements, Contracts, Awards etc.
Deadlines for E-Forms

• All Additional Pay eForms has to be approved and submitted to payroll by the 15th of every month to pay out on the next monthly paycheck.

• Any form that is not completed correctly or does not have all required approvals will not be processed. It will be returned for corrections which can delay payment.

• Dates for Additional Pay eForms lab will be scheduled in November. Once those dates are determined communication will be sent out.
Eform Resources

https://www.utsa.edu/hr/eForms

https://www.utsa.edu/hr/eForms/FAQ/