# eForms Roles & Responsibilities

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# Agenda

- Huron Consulting Group and UTSA Project Recap

- eForms Roles & Responsibilities (R&R)
  - Requestor – Department/Business Service Centers (BSC)
  - Department Manager
  - Budget & Financial Planning
  - People Excellence (HR Compensation)
  - Payroll Services

- Summary

# Huron Consulting Group and UTSA Project Recap

Huron worked with UTSA (including Payroll, Accounting, Academic Affairs, People Excellence and Absence Management) to better explain PeopleSoft roles and responsibilities.

The goal was to improve the transparency of the eForm process.

In addition, the project helped to clarify: Steps in the eForm process, contacts/responsible parties, fields for validation and back office internal controls.

# eForms Roles & Responsibilities (R&R)

These departments are involved in completing critical eForm fields in PeopleSoft:

- Requestor (department/BSC)
- Department manager
- Budget & Financial Planning
- People Excellence (HR Compensation)
- Payroll Services

# eForm R&R for Requestor (Department/BSC)

Requestors are responsible for confirming each of these fields before submitting eForms for approval in PeopleSoft

| Appointment & Transfer | New Position | Contract Addition & Change |
|---|---|---|
| Enter accurate information and submit the eForm on time. | Enter accurate information and submit the eForm on time. | Enter accurate information and submit the eForm on time. |
| **CRITICAL FIELDS:**<br>• CBC<br>• Contract Amount<br>• FTE & Hours<br>• Funding Source<br>• Job Title<br>• Posting ID | **CRITICAL FIELDS:**<br>• CBC<br>• Contract Amount<br>• FTE & Hours<br>• Funding Source<br>• Job Title<br>• Posting ID | **CRITICAL FIELDS:**<br>• Effective Date<br>• End Date<br>• FTE<br>• Funding Source<br>• Position ID<br>• Salary |
| **New POI** | **Termination & End of Assignment** | **Retirement** |
| Enter accurate information and submit the eForm on time. | Enter accurate information and submit the eForm on time. | Enter accurate information and submit the eForm on time. |
| **CRITICAL FIELDS:**<br>• CBC<br>• Contract Amount<br>• FTE & Hours<br>• Funding Source<br>• Job Title<br>• Posting ID | **CRITICAL FIELDS:**<br>• Action<br>• Job Data Effective Date<br>• Last Day Worked<br>• Letter of Resignation<br>• Reason | **CRITICAL FIELDS:**<br>• Intent to Retire Letter<br>• Job Data Effective Date<br>• Last Day Worked |

# eForm R&R for Department Manager

Department managers are responsible for confirming these fields before approving an eForm in PeopleSoft

## Appointment & Transfer

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Compensation
- Employee Type
- End Date
- Funding Availability
- Pay Rate & Frequency

## New Position

Validate and approve faculty, staff, and student positions.

**CRITICAL FIELDS:**

- Compensation
- Employee Type
- End Date
- Funding Availability
- Pay Rate & Frequency

## Contract Addition & Change

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Effective Date
- End Date
- FTE
- Funding Source
- Position ID

## New POI

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Compensation
- End Date
- Funding Availability
- Hire Reason
- Pay Rate & Frequency

## Termination & End of Assignment

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Action
- Job Data Effective Date
- Last Day Worked
- Letter of Resignation
- Reason

## Retirement

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Intent to Retire Letter
- Job Data Effective Date
- Last Day Worked

# eForm R&R for Budget & Financial Planning

Budget & Financial Planning is responsible for confirming these fields before approving an eForm in PeopleSoft

## Appointment & Transfer

Validate and approve budgetary fields.

**CRITICAL FIELDS:**

- Distribution
- Effective Date
- End Date
- Funding Gaps
- Funding Source
- FTE
- Start Date

## New Position

Validate and approve faculty, staff, and student positions.

**CRITICAL FIELDS:**

- Distribution
- Effective Date
- End Date
- Funding Gaps
- Funding Source
- FTE
- Start Date

## Contract Addition & Change

Validate and approve budgetary fields.

**CRITICAL FIELDS:**

- Distribution
- Effective Date
- End Date
- Funding Gaps
- Funding Source
- FTE
- Start Date

## Job Attribute Change

Validate and approve budgetary fields.

**CRITICAL FIELDS:**

- Action & Reason
- Effective Date
- Funding End Date
- Funding Source
- Funding Start Date
- Rate
- Salary

## Position Attribute Change

Validate and approve budgetary fields.

**CRITICAL FIELDS:**

- Action
- Compensation
- Effective Date
- FTE
- Hours
- Reason

## Funding Attribute Change

Validate and approve budgetary fields.

**CRITICAL FIELDS:**

- Distribution
- Funding Source
- Funding Start Date
- Position Number

# eForm R&R for People Excellence (HR Compensation)

People Excellence (HR Compensation) is responsible for confirming these fields before approving an eForm in PeopleSoft

### Staff New Position

Validate and approve benefits eligible positions.

**CRITICAL FIELDS:**

- Classification
- Job Code
- Pay Group

### Staff & Student Job Attribute Change

Evaluate if pay change is appropriate.

**CRITICAL FIELDS:**

- Action & Reason
- Effective Date
- Funding Source
- Funding Start & End Date
- Rate
- Salary

### Staff Position Attribute Change

Validate and approve reclassification, promotion, reorganization changes on benefits eligible positions.

**CRITICAL FIELDS:**

- Action & Reason
- Compensation
- Department
- Job Code
- Position Number

### Additional Pay

Validate and approve one-time merit or temp duties for staff positions.

**CRITICAL FIELDS:**

- Earnings Code
- Funding Source
- Pay Amount
- Pay Reason
- Pay Start & End Date

UTSA. CREATING BOLD FUTURES.

# eForm R&R for Payroll Services

Payroll Services is responsible for confirming these fields before approving an eForm in PeopleSoft

## Additional Pay

Validate and approve all eForm content.

**CRITICAL FIELDS:**

- Earnings Code
- Funding Source
- Pay Amount
- Pay Reason
- Pay Start & End Date

# Summary

- Responsibilities for eForms
- Critical fields for Business Service Centers

# Questions?