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

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 <u>NOT</u> adjust funding end dates as "work-around" for insufficient funding. Contact <u>budget@utsa.edu</u> 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 the 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/