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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment &amp; Transfer</td>
<td>CBC, Contract Amount, FTE &amp; Hours, Funding Source, Job Title, Posting ID</td>
</tr>
<tr>
<td>New Position</td>
<td>CBC, Contract Amount, FTE &amp; Hours, Funding Source, Job Title, Posting ID</td>
</tr>
<tr>
<td>Contract Addition &amp; Change</td>
<td>Effective Date, End Date, FTE, Funding Source, Position ID, Salary</td>
</tr>
<tr>
<td>New POI</td>
<td>CBC, Contract Amount, FTE &amp; Hours, Funding Source, Job Title, Posting ID</td>
</tr>
<tr>
<td>Termination &amp; End of Assignment</td>
<td>Action, Job Data Effective Date, Last Day Worked, Letter of Resignation, Reason</td>
</tr>
<tr>
<td>Retirement</td>
<td>Intent to Retire Letter, Job Data Effective Date, Last Day Worked</td>
</tr>
</tbody>
</table>
eForm R&R for Department Manager

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

<table>
<thead>
<tr>
<th>Section</th>
<th>Critical Fields</th>
</tr>
</thead>
</table>
| Appointment & Transfer       | - Compensation  
- Employee Type  
- End Date  
- Funding Availability  
- Pay Rate & Frequency |
| New Position                 | - Compensation  
- Employee Type  
- End Date  
- Funding Availability  
- Pay Rate & Frequency |
| Contract Addition & Change   | - Effective Date  
- End Date  
- FTE  
- Funding Source  
- Position ID |
| New POI                      | - Compensation  
- End Date  
- Funding Availability  
- Hire Reason  
- Pay Rate & Frequency |
| Termination & End of Assignment | - Action  
- Job Data Effective Date  
- Last Day Worked  
- Letter of Resignation  
- Reason |
| Retirement                   | - Intent to Retire Letter  
- Job Data Effective Date  
- Last Day Worked |
Budget & Financial Planning is responsible for confirming these fields before approving an eForm in PeopleSoft.
People Excellence (HR Compensation) is responsible for confirming these fields before approving an eForm in PeopleSoft.

<table>
<thead>
<tr>
<th>Staff New Position</th>
<th>Staff &amp; Student Job Attribute Change</th>
<th>Staff Position Attribute Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validate and approve benefits eligible positions.</td>
<td>Evaluate if pay change is appropriate.</td>
<td>Validate and approve reclassification, promotion, reorganization changes on benefits eligible positions.</td>
</tr>
<tr>
<td><strong>CRITICAL FIELDS:</strong></td>
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<td><strong>CRITICAL FIELDS:</strong></td>
</tr>
<tr>
<td>• Classification</td>
<td>• Action &amp; Reason</td>
<td>• Action &amp; Reason</td>
</tr>
<tr>
<td>• Job Code</td>
<td>• Effective Date</td>
<td>• Compensation</td>
</tr>
<tr>
<td>• Pay Group</td>
<td>• Funding Source</td>
<td>• Department</td>
</tr>
<tr>
<td></td>
<td>• Funding Start &amp; End Date</td>
<td>• Job Code</td>
</tr>
<tr>
<td></td>
<td>• Rate</td>
<td>• Position Number</td>
</tr>
<tr>
<td></td>
<td>• Salary</td>
<td></td>
</tr>
</tbody>
</table>

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
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?