eForms and Other Personnel Transaction Roles & Responsibilities in PeopleSoft

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Critical 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>
Department managers are responsible for confirming these fields before approving an eForm in PeopleSoft.

- **Appointment & Transfer**
  - Critical Fields:
    - Compensation
    - Employee Type
    - End Date
    - Funding Availability
    - Pay Rate & Frequency
  - Validate and approve all eForm content.

- **New Position**
  - Critical Fields:
    - Compensation
    - Employee Type
    - End Date
    - Funding Availability
    - Pay Rate & Frequency
  - Validate and approve faculty, staff, and student positions.

- **Contract Addition & Change**
  - Critical Fields:
    - Effective Date
    - End Date
    - FTE
    - Funding Source
    - Position ID
  - Validate and approve all eForm content.

- **New POI**
  - Critical Fields:
    - Compensation
    - End Date
    - Funding Availability
    - Hire Reason
    - Pay Rate & Frequency
  - Validate and approve all eForm content.

- **Termination & End of Assignment**
  - Critical Fields:
    - Action
    - Job Data Effective Date
    - Last Day Worked
    - Letter of Resignation
    - Reason
  - Validate and approve all eForm content.

- **Retirement**
  - Critical Fields:
    - Intent to Retire Letter
    - Job Data Effective Date
    - Last Day Worked
  - Validate and approve all eForm content.
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
People Excellence (HR Compensation) is responsible for confirming these fields before approving an eForm in PeopleSoft.
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?