



# eForm Action Types

## New Position Request

- Used to create a new Tenure/Tenure Track Position

**Favorites** | **Main Menu**

**Employee Self-Service** | mvUTShare

Personalize: Content | La

From the PeopleSoft start page, click on the **Create New Request** link under the eForms section

**eForms**

- [View Existing Requests](#)
- [Create New Request](#)**
- [My Pending Approvals](#)
- [Budget Overview](#)
- [Reports](#)

My Requests		
	Request ID	eForms Action
1	<a href="#">00000786</a>	Create Person of Interest
2	<a href="#">00000786</a>	Create Person of Interest
3	<a href="#">00000786</a>	Create Person of Interest
4	<a href="#">00000786</a>	Create Person of Interest
5	<a href="#">00000794</a>	Retirement

My Pending Approvals		
	Request ID	eForms Action
1	<a href="#">00001050</a>	Appointment
2	<a href="#">00000794</a>	Retirement
3	<a href="#">00000793</a>	Termination
4	<a href="#">00000798</a>	Leave Of Absence
5	<a href="#">00000799</a>	Return From Leave

Admin		
	Request ID	eForms Action
1	<a href="#">Request ID</a>	

**Employee Self Service**

- Time Reporting**  
[Timesheet](#), [Web Clock](#), [Absen](#)
- Payroll & Compensation**  
[View Paycheck](#), [Direct Depos](#)
- My Career**
- Personal Information**  
[My Current Profile](#), [Personal I](#)
- Benefits**  
[My UT Benefits](#), [Teachers Retirement System](#), [UT OEB](#), [UT Retirement Manager](#)

**UTSA Business Solutions Center**

- Total Contracts Manager**
- Rowdy Exchange**
- Rowdy Exchange Training Snippets**
  - [Copying a Requisition to a New Cart](#)
  - [Creating Receipts](#)
  - [Shopping for Non-Catalog Items](#)
  - [Adding an Attachment to a Requisition](#)
  - [Approving Requisitions](#)
- Xtender**

**Employee Leave Summary**

Leave Type	Duration
Vacation Leave	37.00 Hours
Sick Leave	25.50 Hours

**UTSA Announcements**

- Human Resources**
  - [REMINDER: Notice to all benefits eligible employees regarding Vacation Le](#)
  - [IMPORTANT - Pay Advice ESS Instructions](#)
  - [More...](#)
- Finance**
  - [Disbursements & Travel Services \(DTS\) Training Materials](#)
  - [More...](#)
- System Announcements**
  - [Leave Accrual Availability](#)
  - [Paycheck View Availability](#)
  - [Throughout Readiness](#)

## Initiate New eForms Request

### Action

**Actions**  **Status**

**Justification**

**Request ID**

**Request Date**

[Processing Messages](#)

[Request History](#)

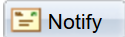
### ▼ Contact Information

#### Entered By

**Name** Samantha Hernandez  
**Phone** 210/458-7563  
**Email ID** Samantha.Hernandez@utsa.edu  
**Dept ID** BHR001 HUMAN RESOURCE SERVICES

#### Secondary Contact

**Name**   
**Phone**



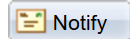
## Initiate New eForms Request

### Action

<b>Actions</b>	▼	<b>Status</b>
<b>Justification</b>	Appointment Contract Additions and Changes Create Person of Interest End Appointment Leave Of Absence <b>New Position Request</b> Retirement Return From Leave Termination	
<b>▼ Contact Info</b>		
<b>Entered By</b>		
<b>Name</b>		
<b>Phone</b>		
<b>Email ID</b>		
<b>Dept ID</b>		
<b>Secondary Co</b>		
<b>Name</b>		
<b>Phone</b>		

Request ID  
Request Date  
[Processing Messages](#)  
[Request History](#)

On the **Initiate New eForm Request** page, click on **New Position Request** from the **Action** dropdown box



## New Position Request

### Action

Actions

New Position Request

Status

\*Justification

Create new Professor position for Mech Engineering

In the **Justification** box, explain the purpose of the request

\*Position Eff Date

08/01/2018



Copy Position



### Proposed Position Information

Position

\*Status

Active

Company

University of Texas, San Anton

\*Business Unit

UTS02



VP of Academic Affairs

\*Department



\*Job Code



\*Job Title

Reg/Temp

Full/Part Time

FLSA Status

\*Empl Class

\*Sal Plan

\*FTE

0.000000

\*Std Hrs/Wk

\*Max Head Cnt

1

\*Reports To Pos



Add the **Position Effective Date**

## New Position Request

### Action

Actions  Status

\*Justification

\*Position Eff Date   Copy Position

### Proposed Position Information

Position	<input type="text"/>
*Status	<input type="text" value="Active"/>
Company	<input type="text" value="University of Texas, San Anton"/>
*Business Unit	<input type="text" value="UTS02"/> VP of Academic Affairs
*Department	<input type="text"/>
*Job Code	<input type="text"/>
*Job Title	<input type="text"/>
Reg/Temp	<input type="text"/>
Full/Part Time	<input type="text"/>
FLSA Status	<input type="text"/>
*Empl Class	<input type="text"/>
*Sal Plan	<input type="text"/>
*FTE	<input type="text" value="0.000000"/>
*Std Hrs/Wk	<input type="text"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	<input type="text"/>

Enter a position number in the **Copy Position** field. If you would like to copy a position that already exists. If not, skip this step.

## New Position Request

### Action

Actions  Status

\*Justification

\*Position Eff Date   Copy Position

#### Proposed Position Information

Position	<input type="text"/>
*Status	<input type="text" value="Active"/>
Company	<input type="text" value="University of Texas, San Anton"/>
*Business Unit	<input type="text" value="UTS02"/> <input type="button" value="🔍"/> VP of Academic Affairs
*Department	<input type="text"/> <input type="button" value="🔍"/>
*Job Code	<input type="text"/> <input type="button" value="🔍"/>
*Job Title	<input type="text"/>
Reg/Temp	<input type="text"/>
Full/Part Time	<input type="text"/>
FLSA Status	<input type="text"/>
*Empl Class	<input type="text"/>
*Sal Plan	<input type="text"/>
*FTE	<input type="text" value="0.000000"/>
*Std Hrs/Wk	<input type="text"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	<input type="text"/> <input type="button" value="🔍"/>

The position **Status** will default to Active. **Company** and **Business Unit** will default appropriately

\*Position Eff Date  

Copy Position  

## Proposed Position Information

Position

\*Status  

Company  

\*Business Unit   VP of Academic Affairs

\*Department  

\*Job Code  

\*Job Title

Reg/Temp  

Full/Part Time  

FLSA Status  

\*Empl Class  

\*Sal Plan  

\*FTE

\*Stnd Hrs/Wk

\*Max Head Cnt

\*Reports To Pos  

Type in or Lookup  
Department ID.



\*Position Eff Date   Copy Position

### Proposed Position Information

Position	<input type="text"/>
*Status	Active ▼
Company	University of Texas, San Anton ▼
*Business Unit	UTS02 🔍 VP of Academic Affairs
*Department	AEN004 🔍 COE MECHANICAL ENGINEERING
*Job Code	10010 🔍 PROFESSOR
*Job Title	PROFESSOR
Reg/Temp	Regular ▼
Full/Part Time	Full Time ▼
FLSA Status	Exempt ▼
*Empl Class	Regular Faculty ▼
*Sal Plan	UTSA Faculty ▼
*FTE	<input type="text" value="1.000000"/>
*Std Hrs/Wk	<input type="text" value="40.00"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	<input type="text"/> 🔍
Reports To Name	<input type="text"/>
*Location Code	<input type="text"/> 🔍
*Mail Drop ID	<input type="text"/>
<input type="checkbox"/> Budgeted Position	

Enter or look up the **Job Code**. Once entered, the following information will populate: **Job Title, Regular/Temp, Full Time/Part Time, FLSA Status, Salary Plan, FTE, Standard hours, and Max Headcount.**

\*Position Eff Date   Copy Position






### Proposed Position Information

Position	<input type="text"/>
*Status	Active <input type="button" value="v"/>
Company	University of Texas, San Anton <input type="button" value="v"/>
*Business Unit	UTS02 <input type="button" value="Q"/> VP of Academic Affairs
*Department	AEN004 <input type="button" value="Q"/> COE MECHANICAL ENGINEERING
*Job Code	10010 <input type="button" value="Q"/> PROFESSOR
*Job Title	PROFESSOR
Reg/Temp	Regular <input type="button" value="v"/>
Full/Part Time	Full Time <input type="button" value="v"/>
FLSA Status	Exempt <input type="button" value="v"/>
*Empl Class	Regular Faculty <input type="button" value="v"/>
*Sal Plan	UTSA Faculty <input type="button" value="v"/>
*FTE	<input type="text" value="1.000000"/>
*Std Hrs/Wk	<input type="text" value="40.00"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	<input type="text"/> <input type="button" value="Q"/>
Reports To Name	<input type="text"/>
*Location Code	<input type="text"/> <input type="button" value="Q"/>
*Mail Drop ID	<input type="text"/>
<input type="checkbox"/> Budgeted Position	

**Change Reg/Temp, Full/Part Time, FTE, Std Hrs/Wk as needed**

\*Position Eff Date 08/01/2018  Copy Position  

**Proposed Position Information**

Position	<input type="text"/>
*Status	Active ▼
Company	University of Texas, San Anton ▼
*Business Unit	UTS02  VP of Academic Affairs
*Department	AEN004  COE MECHANICAL ENGINEERING
*Job Code	10010  PROFESSOR
*Job Title	<input type="text" value="PROFESSOR"/>
Reg/Temp	Regular ▼
Full/Part Time	Full Time ▼
FLSA Status	Exempt ▼
*Empl Class	Regular Faculty ▼
*Sal Plan	UTSA Faculty ▼
*FTE	<input type="text" value="1.000000"/>
*Std Hrs/Wk	<input type="text" value="40.00"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	10026955 
Reports To Name	<input type="text" value="Hai-Chao Han"/>
*Location Code	EB 
*Mail Drop ID	<input type="text" value="01360"/>
<input type="checkbox"/> Budgeted Position	

**Enter the Reports To Pos, Location Code and Mail Drop ID**



Proposed Funding Find First 1 of 1 Last

\*Start Date

**Distribution** | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
<input type="text"/>	<input type="text" value="EGX010"/>	BUDGET PLANNING & DEVELOPMENT	<input type="text"/>	<input type="text"/>	<input type="text"/>	100	

▶ Purpose  
 ▶ Essential Functions  
 ▶ Minimum Qualifications  
 ▶ Preferred Qualifications  
 ▶ Working Conditions  
 ▶ Attachments  
 ▶ Comments  
 ▼ Form Procedures  
 If Benefits Eligible: Org Chart Current/Proposed Attached?  ▼  
 Position Justification Attached?  ▼  
 ▶ Contact Information

Enter or lookup the **Cost Center** and/or **Project/Grant** and Distribution.

All funding periods must equal to 100% distribution

If using a Project/Grant, the Funding End Date will default to the Project End Date

Proposed Funding Find First 1 of 1 Last

\*Start Date

Distribution | Chartfields | Project Info

Ern Cd	Cost Center	Cost Center Descr	Project/Grant
<input type="text"/>	<input type="text" value="EGX010"/>	<input type="text" value="BUDGET PLANNING &amp; DEVELOPMENT"/>	<input type="text"/>

▶ Purpose

▶ Essential Functions

▶ Minimum Qualifications

▶ Preferred Qualifications

▶ Working Conditions

▶ Attachments

▶ Comments

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

▶ Contact Information

This section is not required for faculty positions. Purpose, Essential Functions, Min Qualifications, Preferred Qualifications, and Working Conditions can be skipped.

This information is **not required** for the following positions: Student, Faculty and Non benefits eligible staff requests

- ▶ Purpose
- ▶ Essential Functions
- ▶ Minimum Qualifications
- ▶ Preferred Qualifications
- ▶ Working Conditions
- ▶ Attachments
- ▶ Comments


▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?


▶ Contact Information

- Save
- Submit
- Approve
- Deny
- CallBack
- Sendback
- Cancel
- Copy...
- Check Funds

 Notify

 Add

## Proposed Funding

\*Start Date 08/01/2018 

**Distribution** | Chartfields | Project Info 

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %
<input type="text"/>	<input type="text" value="EGX010"/>	BUDGET PLANNING & DEVELOPMENT	<input type="text"/>	<input type="text"/>	<input type="text"/>	100

- ▶ Purpose
- ▶ Essential Functions
- ▶ Minimum Qualifications
- ▶ Preferred Qualifications
- ▶ Working Conditions
- ▶ Attachments
- ▶ Comments

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

Form Procedures are not required to create a faculty position

## ▶ Contact Information

- Save** | Submit | Approve | Deny | CallBack | Sendback | Cancel | Copy... | Check Funds

▼ Attachments

Type	Note	By
1		

**Add/Delete**

click **Add/Delete** to add **Attachments**, if needed

▼ Comments

Find First 1 of 1

Add/Edit

Comment By	DateTime
------------	----------

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?	N/A	Mercedes Garcia
Position Justification Attached?	N/A	Mercedes Garcia

▶ Contact Information

Save Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds



▼ Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

Select Add/Edit to add Comments to the form

▼ Comments

Find First 1 of 1

Add/Edit

Comment By

DateTime

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?	N/A	Mercedes Garcia
Position Justification Attached?	N/A	Mercedes Garcia

► Contact Information

Save Submit Approve Deny CallBack Sendback Cancel Copy... Check Funds

▼ Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

▼ Comments Find First 1 of 1

Add/Edit

Comment By Date/Time

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

Mercedes Garcia

► Contact Information

Save **Submit** Approve Deny CallBack Sendback Cancel Copy... Check Funds


### Department Approvals

REQUEST\_ID=00015482:Pending

Department Approvals

Pending

[Multiple Approvers](#)  
Department Head/Manager




### Funding Approvals

REQUEST\_ID=00015482:Awaiting Further Approvals

Funding Approvals

Not Routed

[Multiple Approvers](#)  
FMS Cost Center Approver



### Business Office Approvals

REQUEST\_ID=00015482:Awaiting Further Approvals

Faculty/Student Positions

Not Routed [Multiple Approvers](#) Dean 

→

Not Routed [Multiple Approvers](#) VPAFS 

→

Not Routed [Multiple Approvers](#) Budget Office 

→

Not Routed [Multiple Approvers](#) HR Day One 

Once the form has been submitted, the workflow approval steps will be show.

Click on the **Multiple Approvers** link to display who can/will approve the form on the respective steps



# Questions?

Contact:

Human resources

(210) 458-4648

[dayone@utsa.edu](mailto:dayone@utsa.edu)

[compensation@utsa.edu](mailto:compensation@utsa.edu)