eForm Action Types

Appointment (Faculty)

- Hire
  - For brand-new hires
  - Used to create new empl record(s)

- Rehire
  - Same Institution
  - Return to Work Retiree
Faculty Information

- Faculty typically have more than 1 empl record
  - One for Fall/Spring contract
  - One for Summer contract(s)
Example of multiple records

<table>
<thead>
<tr>
<th>Empl RCD</th>
<th>Job Indicator</th>
<th>Company</th>
<th>HR Status</th>
<th>Payroll Status</th>
<th>Eff Date</th>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>SAN</td>
<td>Active</td>
<td>Active</td>
<td>03/01/2018</td>
<td>Position Change</td>
<td>Transfer</td>
</tr>
<tr>
<td>2</td>
<td>0</td>
<td>SAN</td>
<td>Active</td>
<td>Active</td>
<td>05/01/2018</td>
<td>Data Change</td>
<td>Contract</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>SAN</td>
<td>Inactive</td>
<td>Terminated</td>
<td>03/01/2018</td>
<td>Termination</td>
<td>I - End of Assignment</td>
</tr>
</tbody>
</table>
On the **Initiate New eForm Request** page, click on **Appointment** from the dropdown box.
In the **Justification** box, explain the purpose of the request.

Current and Future Incumbents

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Empl Rcd</th>
<th>Name</th>
<th>Position Entry Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Use the **Search** button to search for an employee.
Select the **Hire Type**

- **Hire** = Brand new employee
- **Rehire** = Existing UTSA employee
Select the **Hire Reason**

- **Hire** = Hire
- **Rehire** = Rehire Same Institution or Rehire Return-to-Work Retiree
Enter the **Start Date** and **End Date**.

If End Date is entered, click the **End Job Automatically** button.
Enter the **Position** number. Click the **Magnifying Glass** to search for positions.
On the Look Up Position screen, a position can be filtered by any of the search criteria.
Position Information

• Common Faculty Job Codes
  • 10010 Professor
  • 10020 Associate Professor
  • 10030 Assistant Professor
  • 10050 Lecturer I
  • 10051 Lecturer II
  • 10054 Senior Lecturer
  • 10056 Specialist

• Empl Class
  • FA1 Tenure/Tenure Track
  • FA2 Non-Tenure Track
  • FA3 Summer only position
If the **Empl ID** and **Name** show as ‘**Blank**’, this indicates the position is currently vacant.

Click on the position to bring it over to the form.
If the Position was filled, the Incumbents information will appear here.
This field can be skipped for faculty. **Posted Flag** and **Posting ID** are not mandatory.
<table>
<thead>
<tr>
<th>Proposed Job Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Empl Class</strong></td>
</tr>
<tr>
<td><strong>Comp Frqncy</strong></td>
</tr>
<tr>
<td><strong>FTE</strong></td>
</tr>
</tbody>
</table>

*Empl Class, Comp Frequency, and FTE will auto-populate based on the pos selected.*
Enter the **Proposed Salary**.

One field will calculate the other two.

<table>
<thead>
<tr>
<th>FTE</th>
<th>0.250000</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Proposed 9mo Academic Rate @100%</em></td>
<td>36000.000</td>
</tr>
<tr>
<td>Proposed 9mo Academic Rate @FTE</td>
<td>9000.000</td>
</tr>
<tr>
<td>Proposed Monthly @FTE</td>
<td>1000.000</td>
</tr>
</tbody>
</table>
Enter the Contract **Start** and **End Date**.
Enter the **Contract Worth** in lieu of the 9-month Academic Rate (9 mos. Rate will populate based on the FTE, Contract Start/End Dates, and Contract Worth amount entered).
If the employee’s contract will continue year after year and should be renewed automatically, select the **Renewal Indic** checkbox and use the **Renewal Count** text box to enter the number of renewals. (e.g. 99)
Enter the employee’s biographical data. All **Required** fields are marked with an asterisk.
Click the **Clean Address** link to verify the address against USPS.
The eForm will display all of the **Current** position attributes.
Some position attributes can be modified, including Reg/Temp, FTE/Standard Hours, Reports To, Location, and Mail Drop ID.
Position Information

- Regular
  - Employee will work more than 135 days
- Temporary
  - Employee will work less than 134 days
- Full Time
  - Employee works 40 hours per week
- Part-Time
  - Employee works 39 hours or less per week
The **Current Funding** for the position is displayed; use the **Proposed Funding** section to make any changes to the existing funding source(s) or distribution(s).
The **Proposed Funding** section has been added. The total distribution percentage must always equal 100%.
Answer the appropriate form questions

<table>
<thead>
<tr>
<th>Form Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBC Submitted?</td>
</tr>
<tr>
<td>Date of CBC Submission</td>
</tr>
<tr>
<td>Category of CBC Submitted</td>
</tr>
<tr>
<td>Is the Employee a TRS Return to Work Retiree?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
</tr>
<tr>
<td>Submit</td>
</tr>
<tr>
<td>Approve</td>
</tr>
<tr>
<td>Deny</td>
</tr>
<tr>
<td>CallBack</td>
</tr>
<tr>
<td>Sendback</td>
</tr>
<tr>
<td>Cancel</td>
</tr>
<tr>
<td>Copy...</td>
</tr>
<tr>
<td>Check Funds</td>
</tr>
</tbody>
</table>
Click the **Save** button

*This has to be done prior to adding attachments or comments*
Click the Add/Edit button to add form Comments.

All comments will be visible to everyone in the approval chain.
New Faculty

• Memo of Appointment or Offer Letter
• CBC
Click the **Submit** form to forward the request for approval.
Faculty forms will always route to the Dean’s Office and VPAFS for approval
Summer Appointment

Use the Appointment form
  • New employees
  • To create a new empl record
Questions?
eForm Action Types

Faculty working in two departments

• You will not be able to enter their empl id directly into eForms

• Use the Search button, enter the empl id and then select your employee
Click the **Search** button to search for the employee. They will not populate with their empl ID if they do not report to your department.
Enter the **Empl ID** to select the employee

Hit the **Select** button to add them to your eForm
Summer Appointments

Has the faculty ever worked in the summer?

- If no, use Hire
  - This will create a new empl record for your faculty
- If yes, use Rehire
  - Same Institution
  - Return to Work Retiree