New Appointment Job Aid

The Appointment eForm is used to appoint a person into a position. This includes an internal transfer, new hire or rehire for staff, students, and faculty.

Hire an Employee – Staff, Students, or Hourly Worker

Navigation: Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

1. Navigate to the eForms Action Request page and click on the Add a New Value tab.
2. The Initiate New eForms Request page is displayed. Select the Appointment option from the “Action” drop down menu.
3. The Appointment eForm is displayed. Use the Justification text box to explain or “justify” the reason for the new eForm action requested.
4. From the Employee Information section:
   a) Select the Search button.
   b) The Search Match page is displayed. Enter the employee information such as: First Name, Last Name, and Empl ID (if known). Click Search.
   c) Identify the employee and click the Select button to copy over the employee information. Any existing job information (current or past) will display in the Employee Information section.
   **Note:** If an existing Empl ID was not found, click the Cancel button from the Search Match page to return to the “Initiate New eForms Request” page.
5. Use the Employment Information section to provide details for the new appointment:
a) Select the **Hire Type** and **Hire Reason**; the “Hire Type” you select will determine which “Hire Reason” options are available.

**Hire Type** Options:
- **Hire** – used for initial appointments
- **Rehire** – used to place a former employee in a new position

<table>
<thead>
<tr>
<th>Hire Reasons</th>
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<tbody>
<tr>
<td><em>Hire</em> - used for additional appointments or new hires</td>
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<table>
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<tr>
<th>Rehire Reasons</th>
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<tbody>
<tr>
<td><strong>Returning Retiree</strong> – a retired employee who is coming back to work at UTSA</td>
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<tr>
<td><strong>Same Institution</strong> – internal transfer from one department to another within the same institution</td>
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b) Enter the appointment **Start Date**

c) Enter or lookup the **Position** ID number for the employee.

*Note:* If there is an existing employee assigned to the same position, their name will display in the **Current and Future Incumbents** grid.

6. The **Proposed Job Information** section displays the Empl Class and Comp Frequency based on the Position number entered.

- **Proposed Rate @ 100%**: Provide the proposed annual salary or hourly rate, depending on the field displayed.

- For monthly employees, additional fields will populate including the annual rate based on the position’s FTE, and the monthly amount. These fields may also be used to calculate the **Proposed Rate @ 100%**.
7. The **Personal Information** section:
   - **Brand New Employee**: enter the First Name, Last Name, Address, Home Email, Phone Number, etc.
   - **For existing employees/students**: review the **Proposed Personal Information** and make any necessary changes.

8. After entering the address, select the **Clean Address** link to validate that the address provided is a valid postal address.
9. The **Clean Address** page is displayed. Click on the **Validate Address** link and then click **OK**.

   ![Clean Address](image)

   **Note:** If an exact address match is not found then you will see a suggestion box to select from a list of possible addresses. Choose one of the addresses provided in the list, or just click **OK** to return to the eForm Request.

10. Based on the Position number previously entered in the **Employment Information** section, the **Current Position Information** will display. Use the **Proposed Position Information** to make any changes such as **FTE, Std Hrs/Wk**, and the **Reports To**. (Use the lookup icon to look up the “Reports To” by Name, Empl ID or Position Number.)

    **Note:** If the position “Max Headcount” is more than 1, you will **not** be able to update position data; For any other changes, please contact your Human Resources department.
11. 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).

**Note:** Funding may be split between different Cost Centers or Projects but the total distribution percentage must equal 100%. Use the plus or minus sign to add/remove an additional funding source.

12. Once all the required fields have been completed, click the **Save** button. Notice a **Request ID** number has been assigned, with a **Status** of “Saved.”
13. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments. Use the plus or minus sign to add/remove an attachment or comment.

14. Use the **Form Procedures** section to review a checklist and answer any questions or provide additional information.

15. After you’ve added your attachments and comments, click the **Submit** button.

16. The eForm **Status** shows “Pending Approvals” and the current approval routing is displayed at the bottom of the page.