

## 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.

The screenshot shows the 'Action Request' page with the following elements:

- Navigation: Favorites | Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request
- Section: Assignments: New Hires, Add'l Assign, Rehires, Ext Transfers
- Action: Appointment (selected in a dropdown menu)
- Status: (empty field)
- Justification: (empty text box)
- Request ID: (empty field)
- Request Date: (empty field)
- Processing Messages: (link)
- Request History: (link)

4. From the **Employee Information** section:
  - a) Select the **Search** button.

The screenshot shows the 'Employee Information' section with the following elements:

- Empl ID: (input field with search icon)
- Search: (button highlighted with a red box)
- Table with columns: Empl RCD, Job Indicator, Company, HR Status, Payroll Status, Eff Date, Action, Reason, Dept ID, Dept Name
- Table Row 1: 1, 0, , , , , , , , ,

- 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.

The screenshot shows the 'Search Match' page with the following elements:

- First Name: jon
- Last Name: smith
- Search: (button)
- Table with columns: Name and ID, Phone, Address, Source ID, Empl ID, Universal ID, Type of Name, First Name, Middle Name, Last Name, BirthDate, National ID
- Table Row 1: 1, HR/FIN, Select, 1000022446, , PRI, Jonathan, , Smut, 07/15, \*\*\*\*\*6543
- Table Row 2: 2, HR/FIN, Select, 6000987654, , PRI, Jonathan, P, Smith, 09/19, \*\*\*\*\*1234
- Table Row 3: 3, HR/FIN, Select, 6000011223, , PRI, Jonathan, P, Smith, 05/17, \*\*\*\*\*2234
- Cancel: (button)

5. Use the **Employment Information** section to provide details for the new appointment:

Employment Information			
*Hire Type	<input type="text"/>	*Hire Reason	<input type="text"/>
*Start Date	<input type="text"/>	<input type="checkbox"/>	Transfer From State Agency
*Position	<input type="text"/>		
Posting ID	<input type="text"/>		

  

Current and Future Incumbents			
Empl ID	Empl Rcd	Name	Position Entry Date
1	0		

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

Hire Reasons
<b>Hire</b> - used for additional appointments or new hires

Rehire Reasons
<b>Returning Retiree</b> – a retired employee who is coming back to work at UTSA
<b>Same Institution</b> – internal transfer from one department to another within the same institution

- 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.

Proposed Job Information	
Empl Class	Work Study
Comp Frqncy	Semi-Monthly
FTE	0.475000
Proposed Hourly Rate	<input type="text"/>

- 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%**.

Proposed Job Information	
Empl Class	Classified
Comp Frqncy	Monthly
FTE	1.000000
Proposed Rate @ 100%	<input type="text"/>
Proposed Rate @ FTE	<input type="text"/>
Proposed Monthly@FTE	<input type="text"/>

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**

Effective Date: 07/20/2017

Country United States

Address 1 1234 Wonder Way

Address 2

Address 3

City Bedford State TX

Postal 76021

County

OK Cancel

[Validate Address](#)

[Clear](#)

Override Address Verification

**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.

**Unknown Street. Suggestions:**

- Woodbridge Dr
- Woodfield Way
- Woodhaven Ct
- Woodhill Ln
- Woodhill Ct

Close

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.

Current Position Information		Proposed Position Information	
Position	10033168	Profile ID	
Effective Date	06/01/2015	Position	10033168
Status	Active	Effective Date	06/01/2015
Company	University of Texas, San Anton	Status	Active
Business Unit	UTS02 VP of Academic Affairs	Company	University of Texas, San Anton
Department	AEN004 COE MECHANICAL ENGINEERING	Business Unit	UTS02 VP of Academic Affairs
Job Code	10090 GRADUATE RESEARCH ASSISTANT	Department	AEN004 COE MECHANICAL ENGINEERING
Job Title	GRADUATE RESEARCH ASSISTANT	Job Code	10090 GRADUATE RESEARCH ASSISTANT
Reg/Temp	Regular	Job Title	GRADUATE RESEARCH ASSISTANT
Full/Part Time	Part-Time	Reg/Temp	Regular
FLSA Status	Exempt	Full/Part Time	Part-Time
Empl Class	Graduate Research A	FLSA Status	Exempt
FTE	0.500000	Empl Class	Graduate Research As
Std Hrs/Wk	20.00	*FTE	0.500000
Max Head Cnt	1	Std Hrs/Wk	20.00
Reports To Pos	10030465	Max Head Cnt	1
Reports To Name		Reports To Pos	10025017
Reports To Email		Reports To Name	
Location Code	BSE	Reports To Email	
Mail Drop ID	01360	Location Code	BSE
		Mail Drop ID	01360

- 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.

Current Funding						
Start Date 09/01/2016						
Distribution   Chartfields   Project Info						
Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
654321	SHARED INFO SERVICES				100.000	

  

Proposed Funding						
Start Date 09/01/2016						
Distribution   Chartfields   Project Info						
Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
654321	SHARED INFO SERVICES				100.000	

  

Attachments

Comments

Form Procedures

CBC Completed?

Attended HR New Employee Session?

Contact Information

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

- 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."

**Appointments: New Hires, Add'l Appts, Rehires, Ext Transfers**

**Action**

Actions: Appointment [Status] Saved

Request ID: 00000053  
Request Date: 06/07/2017  
[Processing Messages](#)  
[Request History](#)

Justification: [Text Area]

- 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.
- Use the **Form Procedures** section to review a checklist and answer any questions or provide additional information.
- After you've added your attachments and comments, click the **Submit** button.

**Attachments** 13

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

**Comments** 13

Find First 1 of 1 Last

Add/Edit

Comment By: [Text Area] DateTime: [Text Area]

**Form Procedures** 14

CBC Completed? [Dropdown]  
Attended HR New Employee Session? [Dropdown]

**Contact Information** 15

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

- The eForm **Status** shows "Pending Approvals" and the current approval routing is displayed at the bottom of the page.

**Appointments: New Hires, Add'l Appts, Rehires, Ext Transfers**

**Action**

Actions: Appointment [Status] Pending Approvals

Request ID: 00000053  
Request Date: 06/07/2017  
[Processing Messages](#)  
[Request History](#)

Justification: [Text Area]

**Department Approval**

REQUEST\_ID=00000053:Pending

1  
Pending  
Multiple Approvers

**Business Office Approval**

REQUEST\_ID=00000053:Awaiting Further Approvals

Appointments

Not Routed → Not Routed → Not Routed

Multiple Approvers Provost → Multiple Approvers Budget Office → Multiple Approvers Human Resources

Save Submit Approve Deny Sendback Cancel Copy...