

New Tenure/Tenure Track Appointment

Hire a new T/TT Faculty Member

The **Appointment** is used to hire and add a contract for brand new faculty. Contracts are used to pay the salary, or contracted amount, for faculty within a specified date range.

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.

The screenshot shows a web interface with a breadcrumb trail: Favorites | Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request. The main heading is 'Assignments: New Hires, Add'l Assign, Rehires, Ext Transfers'. Below this is an 'Action' section with a dropdown menu currently showing 'Appointment' and a 'Status' field. A large 'Justification' text box is present. To the right, there are links for 'Request ID', 'Request Date', 'Processing Messages', and 'Request History'.

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.

The screenshot shows a 'Search Match' form with input fields for 'First Name' (containing 'jon') and 'Last Name' (containing 'smith'), and a 'Search' button. Below the search results is a table with columns: Source ID, Empl ID, Universal ID, Type of Name, First Name, Middle Name, Last Name, BirthDate, and National ID. There are three rows of results, each with a 'Select' button in the Source ID column. A 'Cancel' button is located at the bottom of the table.

Source ID	Empl ID	Universal ID	Type of Name	First Name	Middle Name	Last Name	BirthDate	National ID
1 HR/FIN	1000022446		PRI	Jonathan		Smut	07/15	*****6543
2 HR/FIN	6000987654		PRI	Jonathan	P	Smith	09/19	*****1234
3 HR/FIN	6000011223		PRI	Jonathan	P	Smith	05/17	*****2234

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"/>	Current and Future Incumbents	
Posting ID	<input type="text"/>	Empl ID	Empl Rcd
		1	0
		Name	Position Entry Date

- a) Select the **Hire Type** and **Hire Reason**; the “Hire Type” you select will determine which “Hire Reason” options are available.

Hire Type and Hire Reason Options:

- **Hire** – used for initial appointments
 - **Reason- Hire**
- **Rehire** – used to place a former employee in a new position
 - **Reason: Returning Retiree-** Used to rehire a retired UTSA employee
 - **Reason: Same Institution-** Internal rehire

- b) Enter the appointment **Start Date**. Usually Mid-August.

- c) Do not enter an **End Date** for Tenure/Tenure Track faculty.

- d) 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 **Incumbents** grid. If you do not have a position, you need to create one.

- e) Enter the Posting ID, if applicable. This is the STARS requisition number.

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

Proposed Job Information	
Comp Frqncy	<input type="text" value="Contract"/>
FTE	<input type="text" value="1.000000"/>
*Proposed 9mo Academic Rate @100%	<input type="text"/>
Proposed 9mo Academic Rate @FTE	<input type="text"/>
Proposed Monthly @FTE	<input type="text"/>
Contract Information	
Contract Action	<input type="text" value="Create New Contract"/> Contract #
Contract Start Date	<input type="text" value="08/13/2018"/>
Contract End Date	<input type="text" value="08/31/2018"/>
Contract Worth	<input type="text" value="5600"/>
Contract Options	
<input type="checkbox"/> Renewal Indic	Renewal Count <input type="text"/>
	Recalculate Flag: <input checked="" type="checkbox"/>

- Enter the **Contract Information**.
 - The **Contract Action** will default to **Create New Contract**
 - Enter the start date of the contract

- Enter the contract end date
 - This is their first contract, which is a small amount, usually 2 weeks only
 - Enter the **Contract Worth**. This is what they will make in the month of August only. Hit tab and the 9 month rate will appear. Note it may look “off”, the employee will receive the contract worth dollar amount.
 - **Do not check** the **Renewal Indic** checkbox or the **Renewal Count**. This will only renew their 2 week August contract.
 - Recalculate Flag will always be checked
 - Enter Academic Rate using one of the following options:
 - **Proposed 9 MO Academic Rate @ 100%**: Use this field to provide the proposed salary based on a 100% appointment.
 - **Proposed 9 MO Academic Rate @ FTE**: Based on the position’s FTE, this field will reflect what the faculty member will be paid (using the 100% 9-month academic rate and FTE).
 - **Academic Rate @ FTE Proposed Monthly @ FTE**: Based on the position’s FTE, this field will reflect what the faculty member will be paid on a monthly basis (using the 100% 9-month academic rate and FTE).
7. This is only the August Contract. You will need to Add their 9/1 to 5/31 contract using the Contract Additions and Change Form.
8. The **Personal Information** section:
- **Brand New Employee**: enter the First Name, Last Name, Address, Home Email, Phone Number, etc.

Proposed Personal Information	
First Name	<input type="text"/>
Mid Name	<input type="text"/>
Last Name	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Country	<input type="text"/>
Home Email	<input type="text"/>
Home Phone	<input type="text"/>
Business Phone	<input type="text"/>

- **Existing employees/students**: review the “Proposed Personal Information” and make any necessary changes.

Current Personal Information	Proposed Personal Information
First Name: Jonathan	First Name: Jonathan
Middle: P	Mid Name: P
Last Name: Smith	Last Name: Smith
Address 1: [Empty]	Address 1: 1234 Wonder Way
Address 2: [Empty]	Address 2: [Empty]
City: [Empty]	City: Bedford
State: [Empty]	State: TX
Zip: [Empty]	Zip: 76021
Country: [Empty]	Country: [Empty]
Home Email: [Empty]	Home Email: [Empty]
Home Phone: [Empty]	Home Phone: [Empty]
Business Phone: [Empty]	Business Phone: [Empty]

- After entering the address, select the **Clean Address** link to validate that the address provided is a valid postal address.

Proposed Personal Information	
First Name	Jonathan
Mid Name	P
Last Name	Smith
Address 1	1234 Wonder Way Clean Address
Address 2	[Empty]
City	Bedford
State	TX
Zip	76021
Country	USA
Home Email	[Empty]
Home Phone	[Empty]
Business Phone	[Empty]

- 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	[Empty]
Address 3	[Empty]
City	Bedford
State	TX
Postal	76021
County	[Empty]
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>
Validate Address	
Clear	
<input type="checkbox"/> 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 **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.)

Current Position Information		Proposed Position Information	
Position	10028801 Profile ID	Position	10028801
Effective Date	11/01/2015	Effective Date	11/01/2015
Status	Active	Status	Active
Company	University of Texas, San Anton	Company	University of Texas, San Anton
Business Unit	UTS02 VP of Academic Affairs	Business Unit	UTS02 VP of Academic Affairs
Department	AEH007 COEHD EDUC LEADERSHIP	Department	AEH007 COEHD EDUC LEADERSHIP
Job Code	10010 PROFESSOR	Job Code	10010 PROFESSOR
Job Title	PROFESSOR	Job Title	PROFESSOR
Reg/Temp	Regular	Reg/Temp	Regular
Full/Part Time	Full-Time	Full/Part Time	Full-Time
FLSA Status	Exempt	FLSA Status	Exempt
Empl Class	Regular Faculty	Empl Class	Regular Faculty
FTE	1.000000	*FTE	1.000000
Std Hrs/Wk	40.00	Std Hrs/Wk	40.00
Max Head Cnt	1	Max Head Cnt	1
Reports To Pos	10028273	Reports To Pos	10028273
Reports To Name	Enrique Aleman	Reports To Name	Enrique Aleman
Reports To Email	Enrique.Aleman@utsa.edu	Reports To Email	Enrique.Aleman@utsa.edu
Location Code	BVB	Location Code	BVB
Mail Drop ID	01540	Mail Drop ID	01540

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).

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 Find First 1 of 1 Last

Start Date 03/23/2018

Distribution Chartfields Project Info [EFF]

Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
EGX010	BUDGET PLANNING & DEVELOPMENT				100.000	

Proposed Funding Find First 1 of 1 Last

*Start Date 04/01/2018 [B]

Distribution Chartfields Project Info [EFF]

Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
EGX010	BUDGET PLANNING & DEVELOPMENT				100.000	

Attachments

Comments

Form Procedures

CBC Submitted? Yes ▾

Date of CBC Submission [B]

Category of CBC Submitted

Is the Employee a TRS Return to Work Retiree? No ▾

Contact Information

Save Submit Approve Deny CallBack 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

Justification

Request ID 00000054

Request Date 06/07/2017

[Processing Messages](#)

[Request History](#)

- Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

Comments Find First 1 of 1 Last

Add/Edit

Comment By DateTime

- Use the **Form Procedures** section to review a checklist and answer any questions or provide additional information.
- After you’ve added attachments and comments, click the **Submit** button.
- 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 00000054
Justification Request Date 06/07/2017
[Processing Messages](#)
[Request History](#)

Department Approval

REQUEST_ID=00000054:Pending

1

Pending
Multiple Approvers

Business Office Approval

REQUEST_ID=00000054:Awaiting Further Approvals

Appointments

Not Routed Multiple Approvers Provost
Not Routed Multiple Approvers Budget Office
Not Routed Multiple Approvers Human Resources

Save Submit Approve Deny Sendback Cancel Copy...