

New NTT Appointment Job Aid

Hire a Faculty Member

The **Appointment** is used to hire and add a contract for brand new faculty. Contracts are used to pay the salary 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.

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.

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"/>	<table border="1"> <thead> <tr> <th colspan="4">Current and Future Incumbents</th> </tr> <tr> <th>Empl ID</th> <th>Empl Rcd</th> <th>Name</th> <th>Position Entry Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table>			Current and Future Incumbents				Empl ID	Empl Rcd	Name	Position Entry Date	1	0		
Current and Future Incumbents																
Empl ID	Empl Rcd	Name	Position Entry Date													
1	0															
Posting ID	<input type="text"/>															

- 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**.

- c) Enter the expected **End Date**. Faculty who are not benefits eligible, should have an end date. Check **End Job Automatically** so the job can auto-terminate.

- 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.

- 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	
*Empl Class	<input type="text" value="Non-Tenure Track Faculty"/>
Comp Frqncy	<input type="text" value="Contract"/>
FTE	<input type="text" value="0.500000"/>
*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"/>
Contract End Date	<input type="text"/>
Contract Worth	<input type="text"/>
Contract Options	
<input type="checkbox"/> Renewal Indic	Renewal Count <input type="text"/>
	Recalculate Flag: <input checked="" type="checkbox"/>

- 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. 9 mos. Rate will populate based on the FTE, Contract Start/End Dates, and Contract Worth amount entered

- **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).
- 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
 - Enter the **Contract Worth**. The salary or dollar amount to be paid is considered the “Contract Worth.” Make sure the FTE is correct, before entering the amount. If it needs to be changed, scroll down to update the position hours and FTE.

7. 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: <input type="text"/>	Address 1: 1234 Wonder Way
Address 2: <input type="text"/>	Address 2: <input type="text"/>
City: <input type="text"/>	City: Bedford
State: <input type="text"/>	State: TX
Zip: <input type="text"/>	Zip: 76021
Country: <input type="text"/>	Country: <input type="text"/>
Home Email: <input type="text"/>	Home Email: <input type="text"/>
Home Phone: <input type="text"/>	Home Phone: <input type="text"/>
Business Phone: <input type="text"/>	Business Phone: <input type="text"/>

8. 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:

City: Bedford

State: TX

Zip: 76021

Country: USA

Home Email:

Home Phone:

Business Phone:

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:

[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 **OK** to return to the eForm Request.

Unknown Street. Suggestions:

Woodbridge Dr

Woodfield Way

Woodhaven Ct

Woodhill Ln

Woodhill Ct

10. Based on the Position number 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	10092949	Profile ID	
Effective Date	03/23/2018	Effective Date	03/23/2018
Status	Active	Status	Active
Company	University of Texas, San Anton	Company	University of Texas, San Anton
Business Unit	UTS02	VP of Academic Affairs	UTS02
Department	AEN004	COE MECHANICAL ENGINEERING	AEN004
Job Code	10050	LECTURER I	10050
Job Title	LECTURER I	Job Title	LECTURER I
Reg/Temp	Regular	Reg/Temp	Regular
Full/Part Time	Full-Time	Full/Part Time	Full-Time
FLSA Status	Exempt	FLSA Status	Exempt
Empl Class	Non-Tenure Track Fac	Empl Class	Non-Tenure Track Facu
FTE	0.500000	*FTE	1.000000
Std Hrs/Wk	20.00	Std Hrs/Wk	40.00
Max Head Cnt	1	Max Head Cnt	1
Reports To Pos	10026955	Reports To Pos	
Reports To Name	Hai-Chao Han	Reports To Name	
Reports To Email	Hai-Chao.Han@utsa.edu	Reports To Email	
Location Code	BSE	Location Code	
Mail Drop ID	01123	Mail Drop ID	

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						
Start Date 03/23/2018						
Distribution Chartfields Project Info						
Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
EGX010	BUDGET PLANNING & DEVELOPMENT				100.000	

Proposed Funding						
*Start Date 04/01/2018						
Distribution Chartfields Project Info						
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

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

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."

Appointments: New Hires, Add'l Appts, Rehires, Ext Transfers	
Action	Appointment
Actions	Status Saved
Justification	
Request ID	00000054
Request Date	06/07/2017
Processing Messages Request History	

13. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.
14. Use the **Form Procedures** section to review a checklist and answer any questions or provide additional information.
15. After you've added attachments and comments, click the **Submit** button.

▼ Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

▼ Comments
Find First 1 of 1 Last

Add/Edit

Comment By	DateTime
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▼ Form Procedures

CBC Submitted?	Yes ▼	Mercedes Garcia-eF-Req
Date of CBC Submission	<input type="text" value=""/> <small>BY</small>	
Category of CBC Submitted	<input type="text"/>	
Is the Employee a TRS Return to Work Retiree?	No ▼	Mercedes Garcia-eF-Req

▶ Contact Information

Save	Submit	Approve	Deny	CallBack	Sendback	Cancel	Copy...	Check Funds
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16. 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	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> Pending Multiple Approvers </div> <div style="text-align: center; margin-top: 5px;"> 🕒 </div>
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Business Office Approval

REQUEST_ID=00000054: Awaiting Further Approvals

Appointments

<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> Not Routed Multiple Approvers Provost </div> <div style="text-align: center; margin-top: 5px;"> 📁 </div>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> Not Routed Multiple Approvers Budget Office </div> <div style="text-align: center; margin-top: 5px;"> 📁 </div>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> Not Routed Multiple Approvers Human Resources </div> <div style="text-align: center; margin-top: 5px;"> 📁 </div>
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Save	Submit	Approve	Deny	Sendback	Cancel	Copy...
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