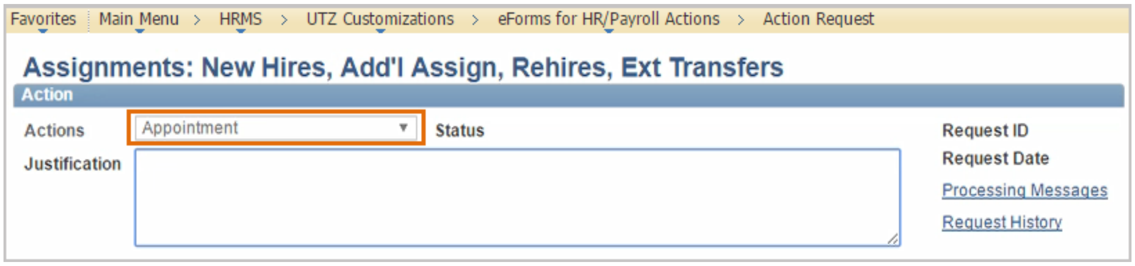
New NTT Appointment Job Aid

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.

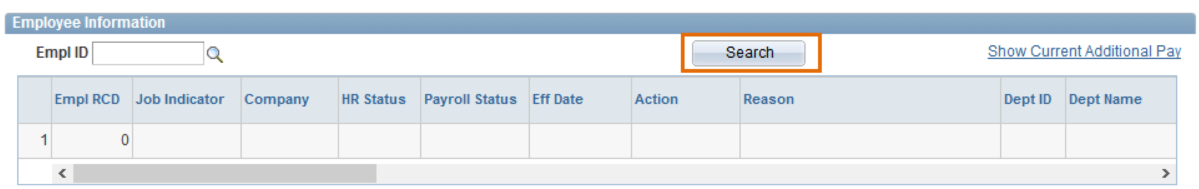
Navigation: *Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request*

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.

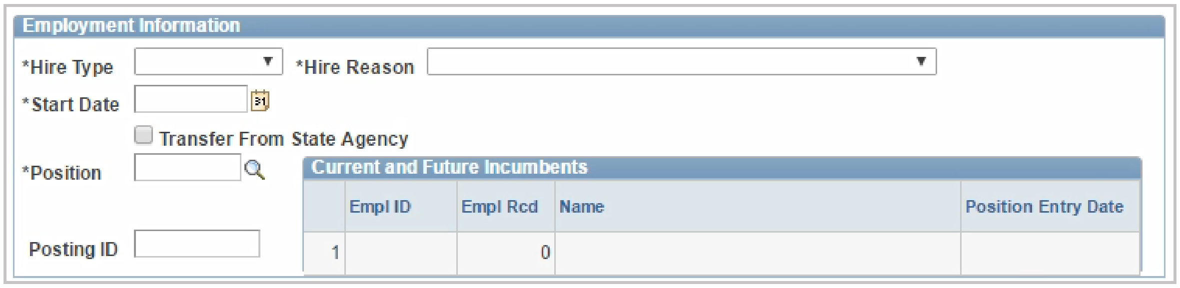


3. The **Appointment** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the new eForm action requested.
4. From the **Employee Information** section:
   a) Select the **Search** button.
   b) The **Search Match** page is displayed. Enter the employee information 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.



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


Employment Information

*Hire Type *Hire Reason

*Start Date

Transfer From State Agency

*Position

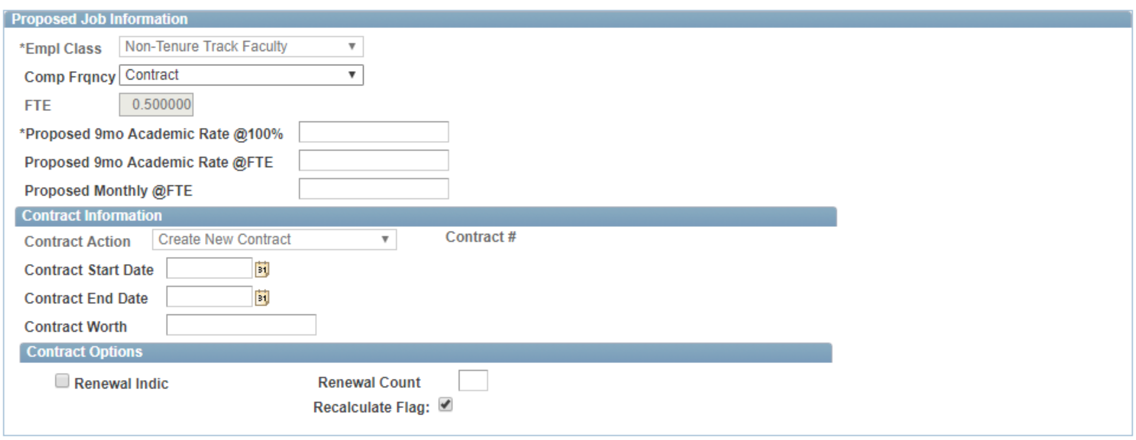
Current and Future Incumbents

	Empl ID	Empl Rcd	Name	Position Entry Date
1		0		

Posting ID

   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**, if applicable. Check **End Job Automatically** if the job should be auto-terminated. Usually
   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 Non-Tenure Track Faculty

Comp Frqncy Contract

FTE 0.500000

*Proposed 9mo Academic Rate @100%

Proposed 9mo Academic Rate @FTE

Proposed Monthly @FTE

Contract Information

Contract Action Create New Contract

Contract #

Contract Start Date

Contract End Date

Contract Worth

Contract Options

Renewal Indic

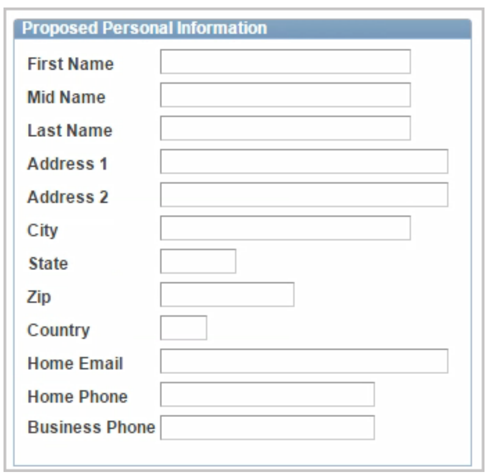
Renewal Count

Recalculate Flag:

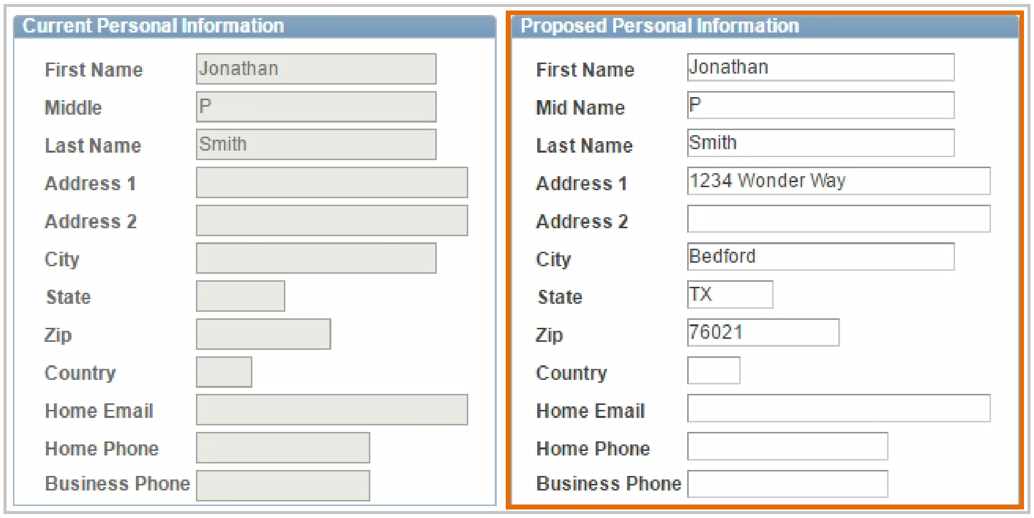
- Enter Academic Rate using one of the following options:
   - **Proposed 9 MO Academic Rate @ 100%:** Use this field to provide the proposed salary based on a 100% appointment.
   - **Proposed 9 MO Academic Rate @ FTE:** Based on the position's FTE, this field will reflect what the faculty member will 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).
- 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** 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.) The salary or dollar amount to be paid is considered the "Contract Worth." provide the FTE, Contract Start Date and the Contract End Date.
    - 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)
    - Recalculate Flag should always be checked

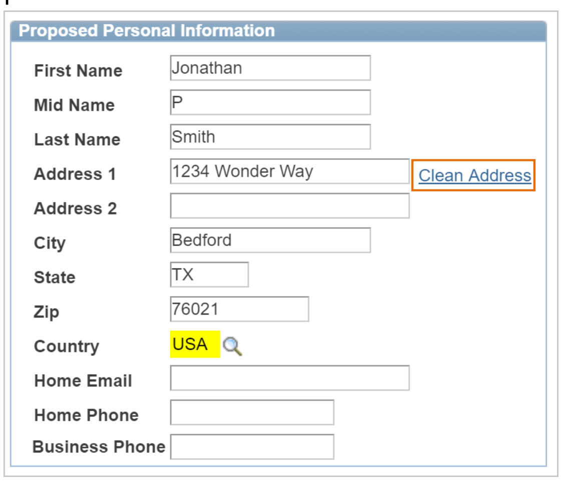
7. The **Personal Information** section:
    - <u>Brand New Employee</u>: enter the First Name, Last Name, Address, Home Email, Phone Number, etc.



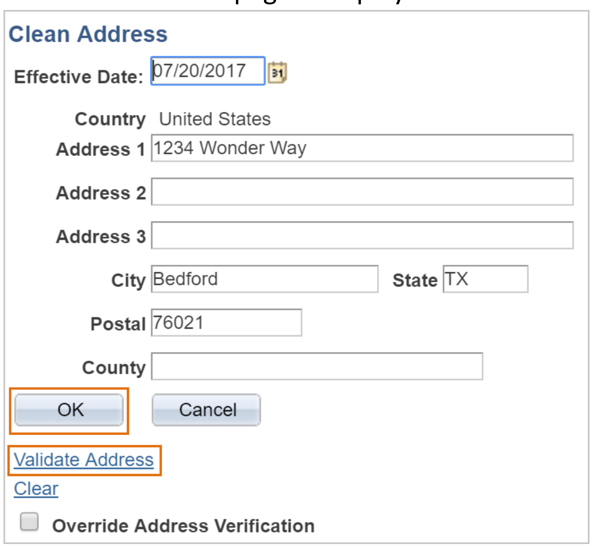
    - <u>Existing employees/students</u>: review the "Proposed Personal Information" and make any necessary changes.



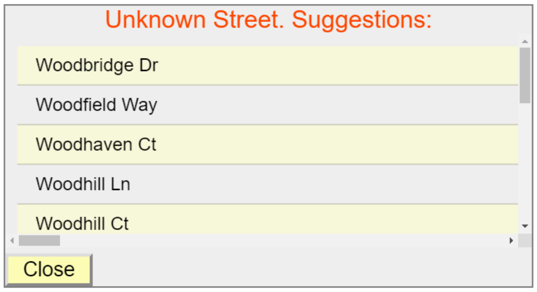
8. After entering the address, select the **Clean Address** link to validate that the address provided is a valid postal address.



9. The **Clean Address** page is displayed. Click on the **Validate Address** link and then click **OK.**

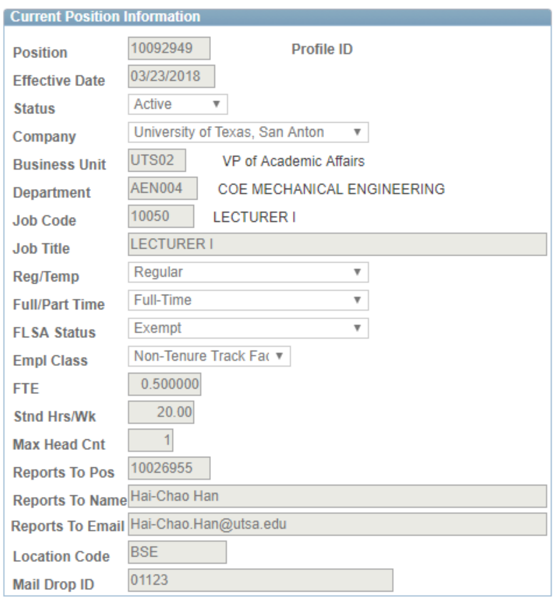


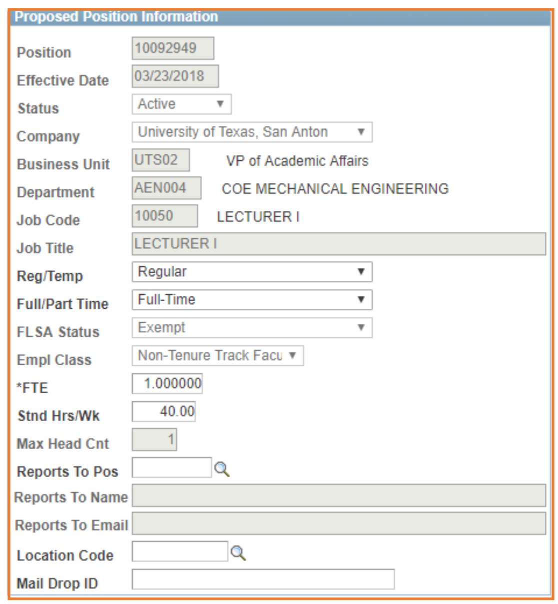
Note: If an exact address match is not found then you will see a suggestion box to select from a list of possible addresses. Choose one of the addresses provided in the list, or just **OK** to return to the eForm Request.



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.)

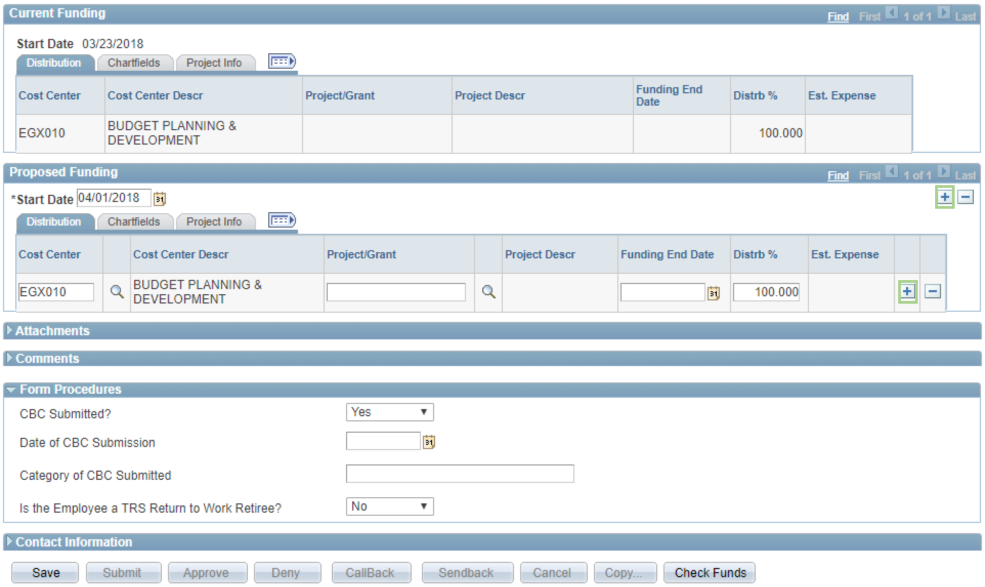
    Note: If the position “Max Headcount” is more than 1, you will not be able to update position data; For any other changes, please contact your Human Resources department.



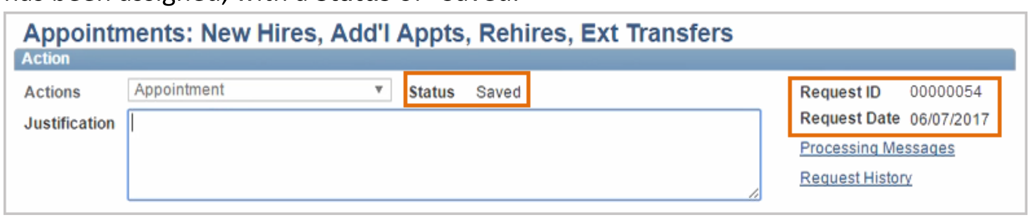


11. The **Current Funding** for the position is displayed; use the **Proposed Funding** section to make any changes to the existing funding source(s) or distribution(s).

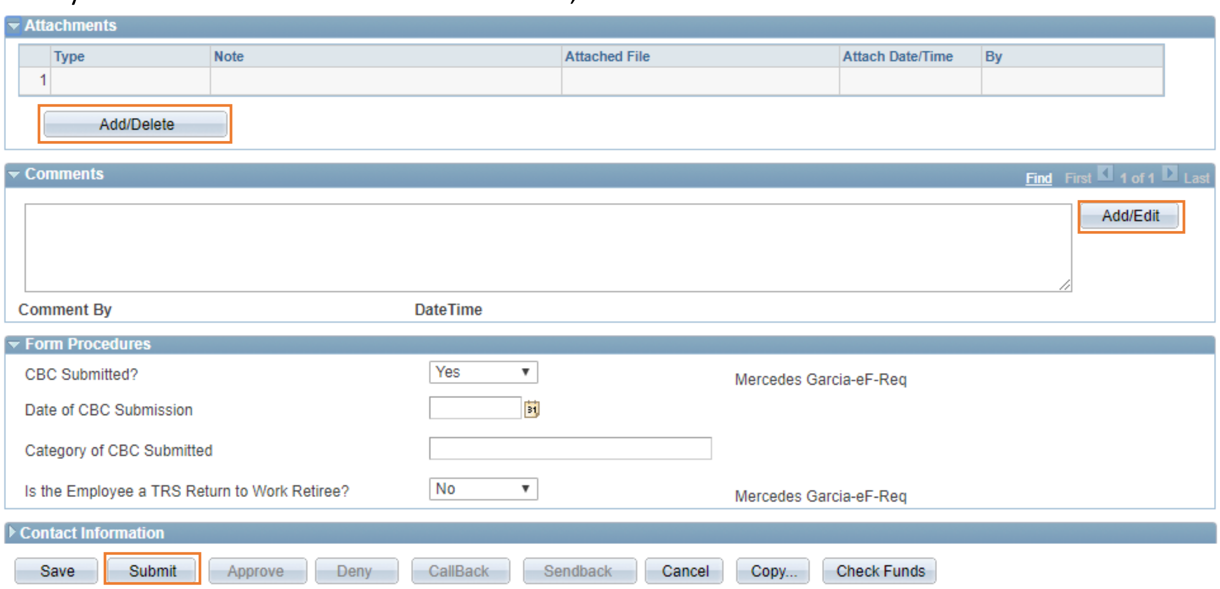
    Funding may be split between different Cost Centers or Projects but the total distribution percentage must equal 100%. Use the plus or minus sign to add/remove an additional funding source.



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.
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.



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