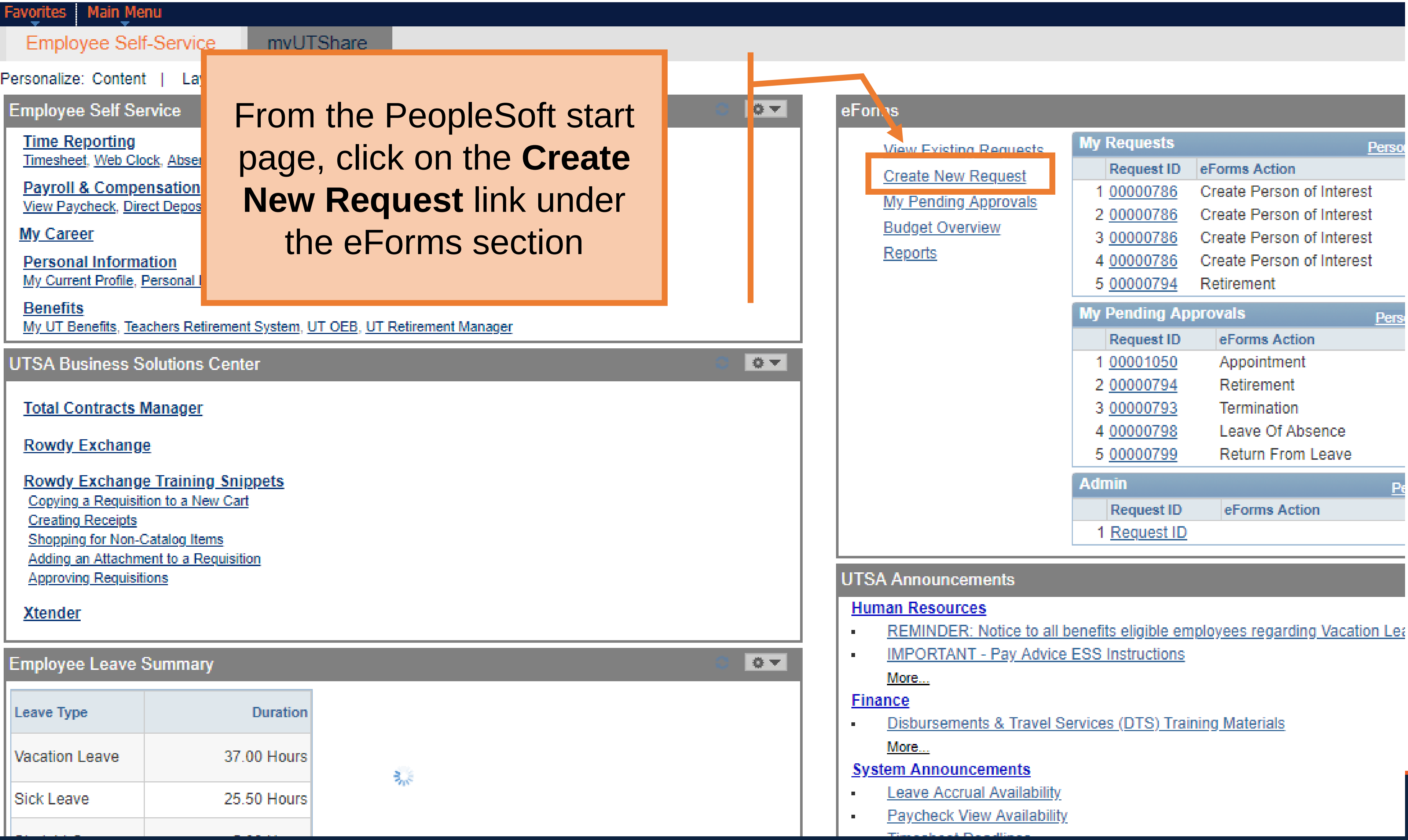
eForm Action Types

New Position Request

- Used to create new positions for Staff, Faculty, Students and POIs

From the PeopleSoft start page, click on the **Create New Request** link under the eForms section



Employee Self Service

- Time Reporting
  - Timesheet, Web Clock, Abse
- Payroll & Compensation
  - View Paycheck, Direct Depos
- My Career
- Personal Information
  - My Current Profile, Personal I
- Benefits
  - My UT Benefits, Teachers Retirement System, UT OEB, UT Retirement Manager

UTSA Business Solutions Center

- Total Contracts Manager
- Rowdy Exchange
- Rowdy Exchange Training Snippets
  - Copying a Requisition to a New Cart
  - Creating Receipts
  - Shopping for Non-Catalog Items
  - Adding an Attachment to a Requisition
  - Approving Requisitions
- Xtender

Employee Leave Summary

Leave Type	Duration
Vacation Leave	37.00 Hours
Sick Leave	25.50 Hours

eForms

- View Existing Requests
- Create New Request
- My Pending Approvals
- Budget Overview
- Reports

My Requests

	Request ID	eForms Action
1	00000786	Create Person of Interest
2	00000786	Create Person of Interest
3	00000786	Create Person of Interest
4	00000786	Create Person of Interest
5	00000794	Retirement

My Pending Approvals

	Request ID	eForms Action
1	00001050	Appointment
2	00000794	Retirement
3	00000793	Termination
4	00000798	Leave Of Absence
5	00000799	Return From Leave

Admin

	Request ID	eForms Action
1	Request ID	

UTSA Announcements

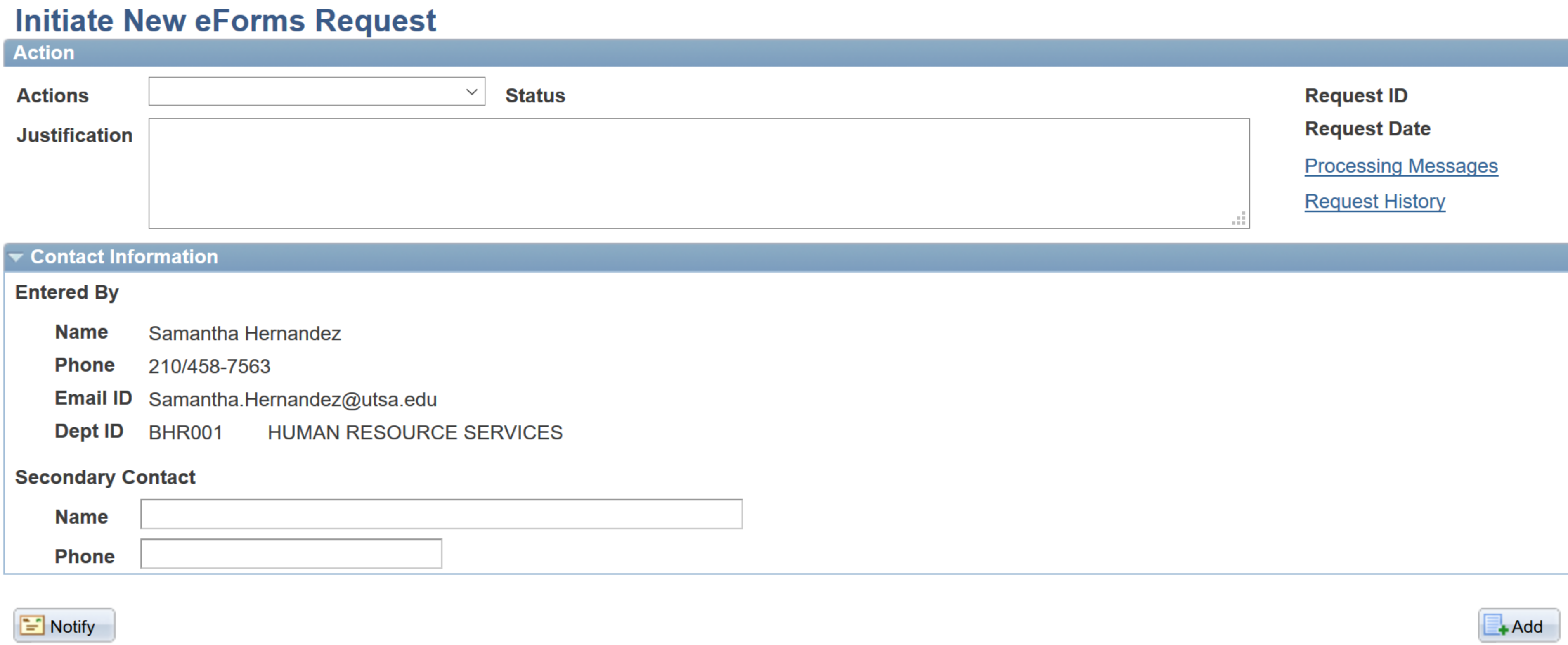
Human Resources
- REMINDER: Notice to all benefits eligible employees regarding Vacation Lea
- IMPORTANT - Pay Advice ESS Instructions

More...

Finance
- Disbursements & Travel Services (DTS) Training Materials

More...

System Announcements
- Leave Accrual Availability
- Paycheck View Availability



Initiate New eForms Request

Action

Actions

Status

Justification

Request ID

Request Date

Processing Messages

Request History

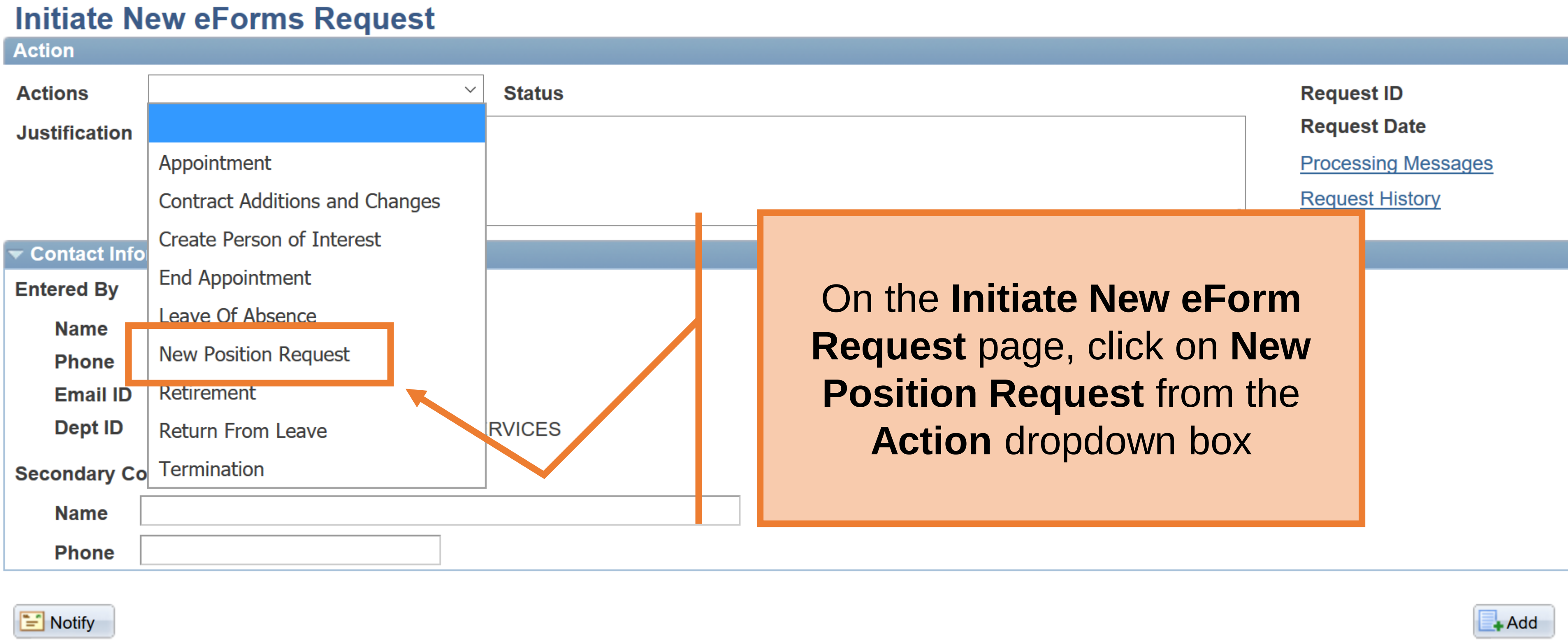
Contact Information

Entered By

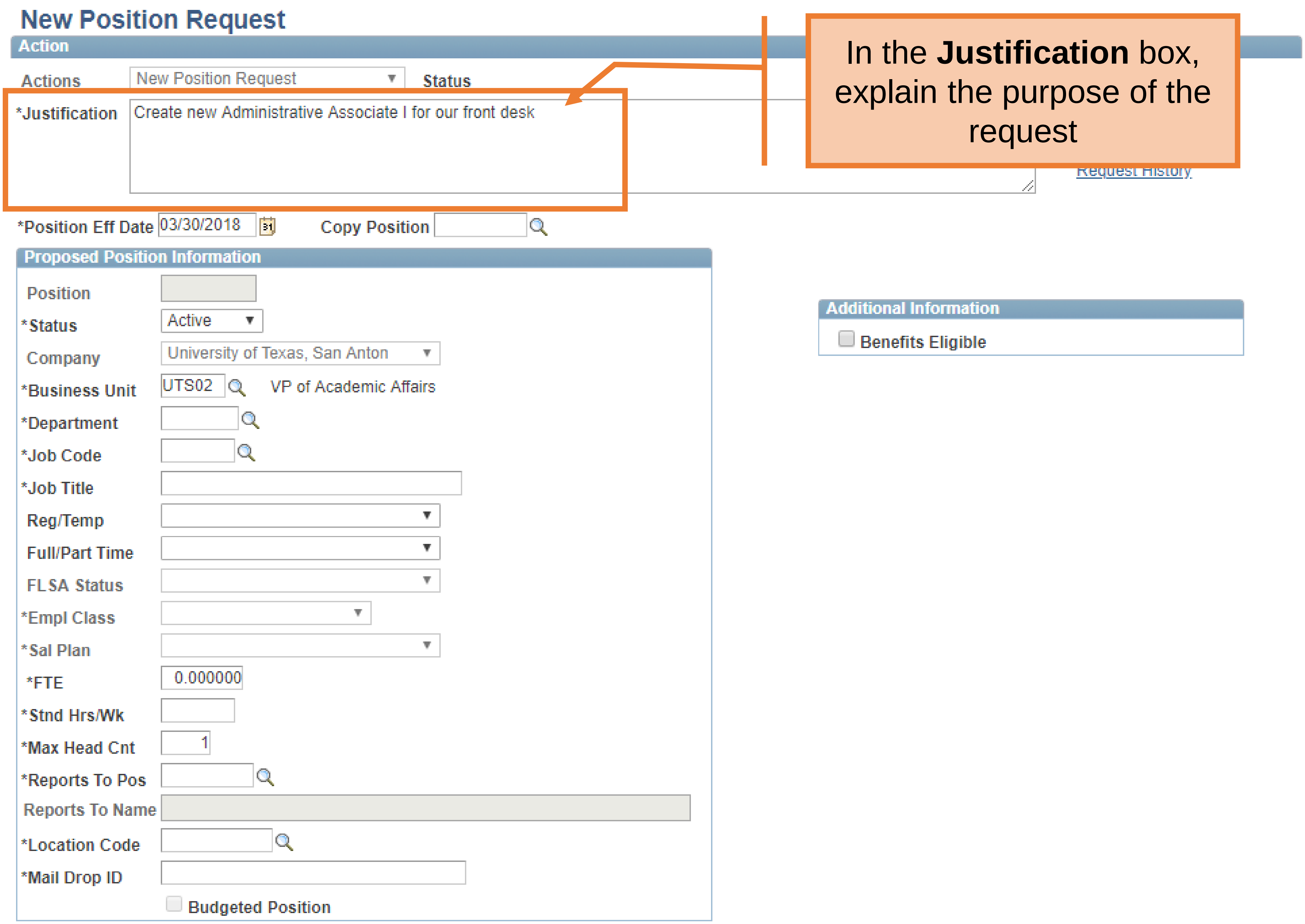
Name Samantha Hernandez
Phone 210/458-7563
Email ID Samantha.Hernandez@utsa.edu
Dept ID BHR001 HUMAN RESOURCE SERVICES

Secondary Contact

Name
Phone


Initiate New eForms Request
Action
Actions
Status
Request ID
Justification
Request Date
Processing Messages
Request History
Appointment
Contract Additions and Changes
Create Person of Interest
End Appointment
Leave Of Absence
New Position Request
Retirement
Return From Leave
Termination
Contact Info
Entered By
Name
Phone
Email ID
Dept ID
RVICES
Secondary Co
Name
Phone
Notify
Add

On the **Initiate New eForm Request** page, click on **New Position Request** from the **Action** dropdown box



In the **Justification** box, explain the purpose of the request

New Position Request

Action

Actions	New Position Request ▼
Status	
*Justification	Create new Administrative Associate I for our front desk
*Position Eff Date	03/30/2018
Copy Position	

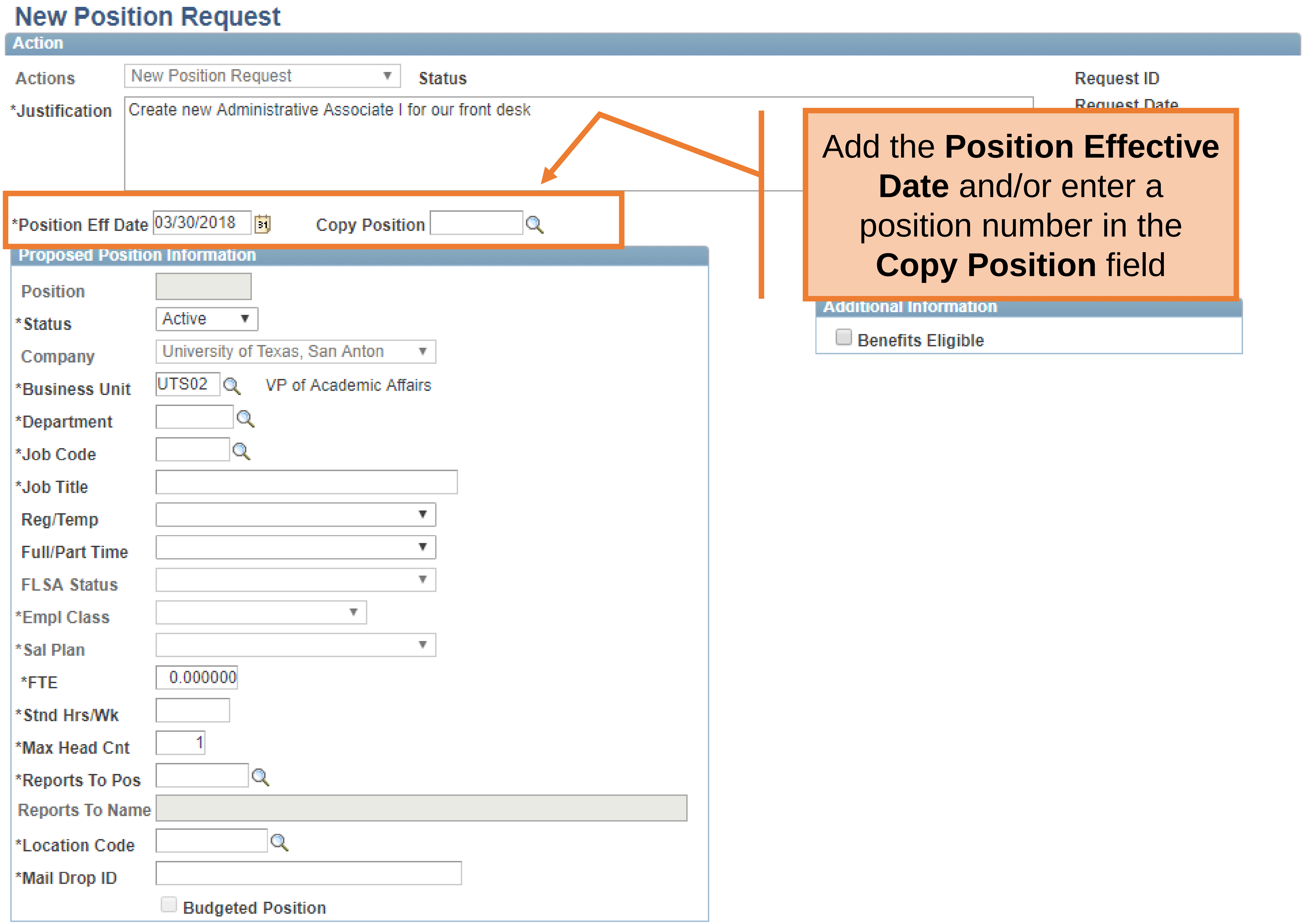
Proposed Position Information

Position	
*Status	Active ▼
Company	University of Texas, San Anton ▼
*Business Unit	UTS02 VP of Academic Affairs
*Department	
*Job Code	
*Job Title	
Reg/Temp	▼
Full/Part Time	▼
FLSA Status	▼
*Empl Class	▼
*Sal Plan	▼
*FTE	0.000000
*Stnd Hrs/Wk	
*Max Head Cnt	1
*Reports To Pos	
Reports To Name	
*Location Code	
*Mail Drop ID	

☐ Budgeted Position

Additional Information

☐ Benefits Eligible



New Position Request

Action

Actions: New Position Request ▼

Status

Request ID

Request Date

*Justification: Create new Administrative Associate I for our front desk

*Position Eff Date: 03/30/2018

Copy Position:

Proposed Position Information

Position:

*Status: Active ▼

Company: University of Texas, San Anton ▼

*Business Unit: UTS02 VP of Academic Affairs

*Department:

*Job Code:

*Job Title:

Reg/Temp: ▼

Full/Part Time: ▼

FLSA Status: ▼

*Empl Class: ▼

*Sal Plan: ▼

*FTE: 0.000000

*Stnd Hrs/Wk:

*Max Head Cnt: 1

*Reports To Pos:

Reports To Name:

*Location Code:

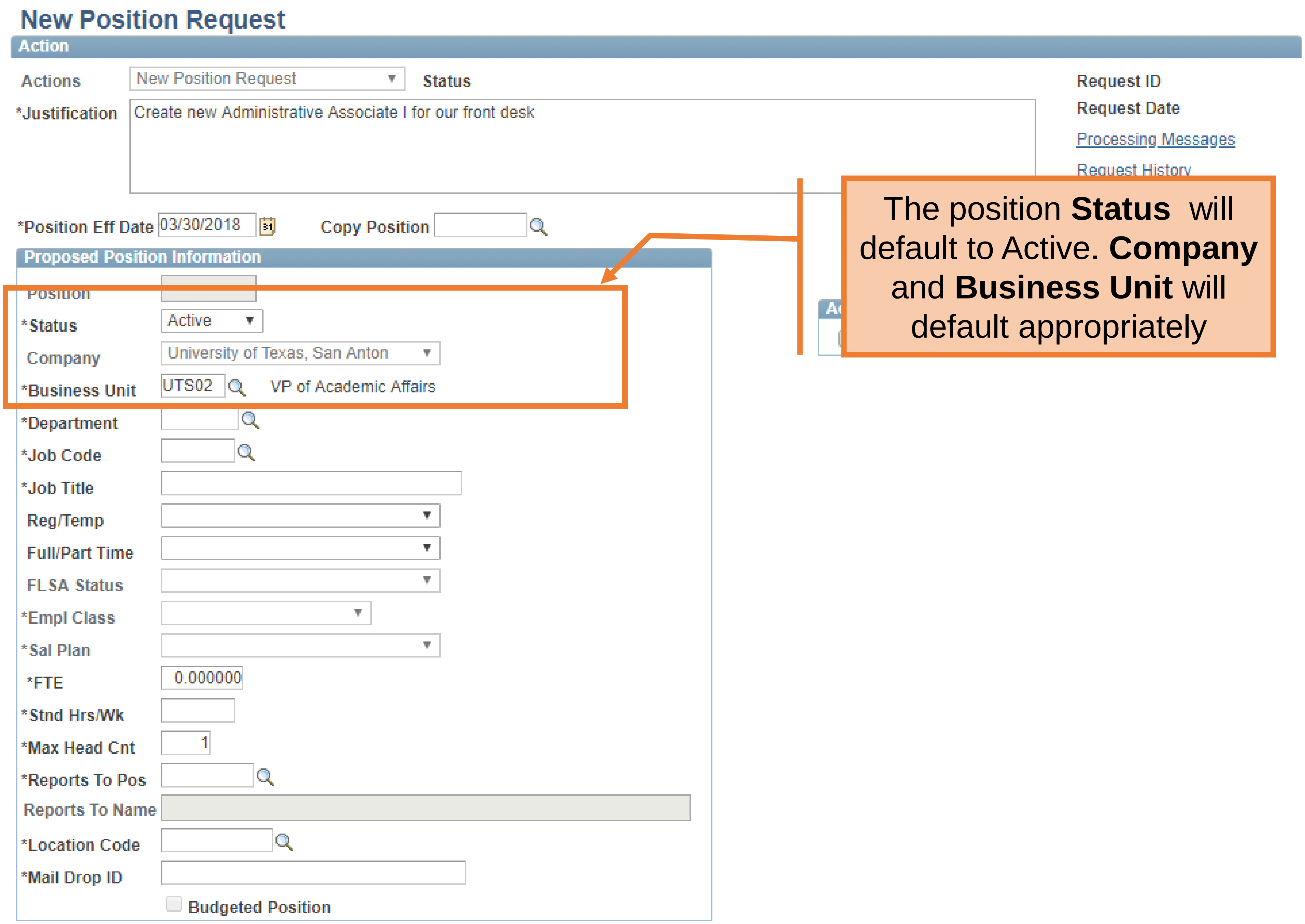
*Mail Drop ID:

☐ Budgeted Position

Additional Information

☐ Benefits Eligible

Add the **Position Effective Date** and/or enter a position number in the **Copy Position** field



New Position Request

Action

Actions: New Position Request

Status

Request ID

Request Date

*Justification: Create new Administrative Associate I for our front desk

*Position Eff Date: 03/30/2018

Copy Position

Proposed Position Information

Position

*Status: Active

Company: University of Texas, San Anton

*Business Unit: UTS02 VP of Academic Affairs

*Department

*Job Code

*Job Title

Reg/Temp

Full/Part Time

FLSA Status

*Empl Class

*Sal Plan

*FTE: 0.000000

*Stnd Hrs/Wk

*Max Head Cnt: 1

*Reports To Pos

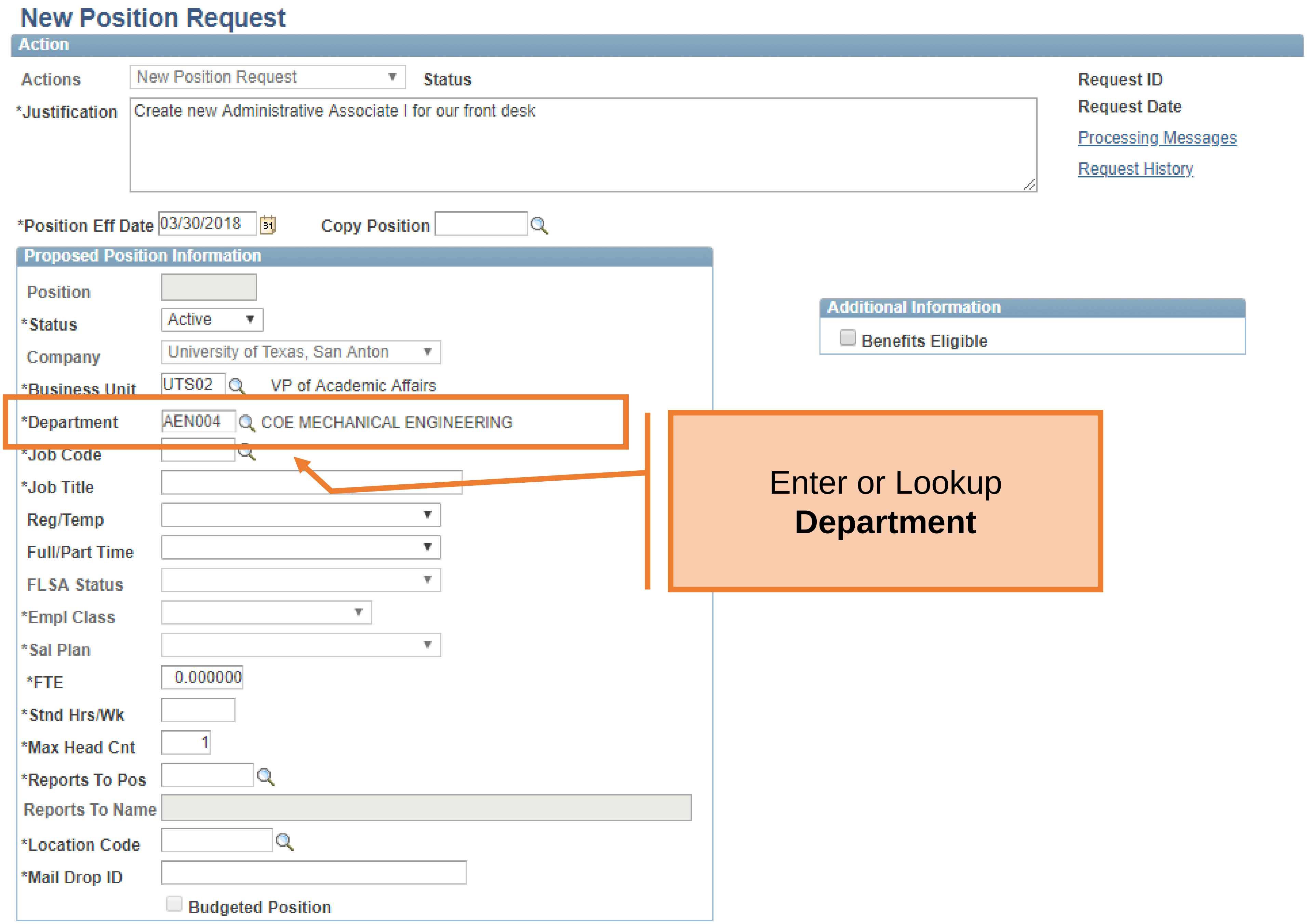
Reports To Name

*Location Code

*Mail Drop ID

☐ Budgeted Position

The position **Status** will default to Active. **Company** and **Business Unit** will default appropriately



New Position Request

Action

Actions: New Position Request ▼
Status
Request ID
Request Date
*Justification: Create new Administrative Associate I for our front desk

*Position Eff Date: 03/30/2018
Copy Position:

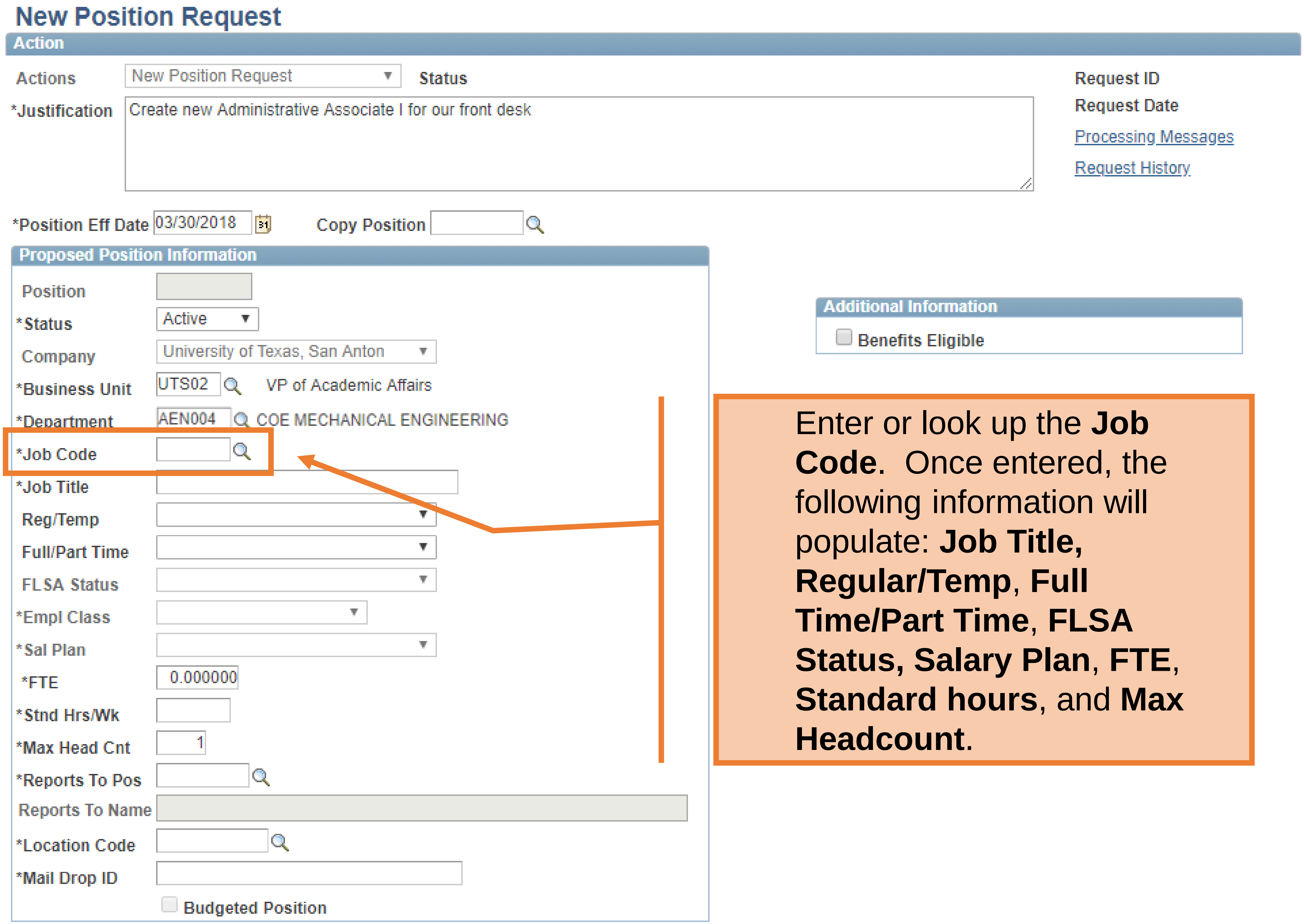
Proposed Position Information

Position:
*Status: Active ▼
Company: University of Texas, San Anton ▼
*Business Unit: UTS02 VP of Academic Affairs
*Department: AEN004 COE MECHANICAL ENGINEERING
*Job Code:
*Job Title:
Reg/Temp: ▼
Full/Part Time: ▼
FLSA Status: ▼
*Empl Class: ▼
*Sal Plan: ▼
*FTE: 0.000000
*Stnd Hrs/Wk:
*Max Head Cnt: 1
*Reports To Pos:
Reports To Name:
*Location Code:
*Mail Drop ID:
☐ Budgeted Position

Additional Information

☐ Benefits Eligible

Enter or Lookup **Department**



New Position Request

Action

Actions: New Position Request ▾

Status

Request ID

Request Date

Processing Messages

Request History

*Justification: Create new Administrative Associate I for our front desk

*Position Eff Date: 03/30/2018

Copy Position:

Proposed Position Information

Position:

*Status: Active ▾

Company: University of Texas, San Anton ▾

*Business Unit: UTS02 VP of Academic Affairs

*Department: AEN004 COE MECHANICAL ENGINEERING

*Job Code:

*Job Title:

Reg/Temp: ▾

Full/Part Time: ▾

FLSA Status: ▾

*Empl Class: ▾

*Sal Plan: ▾

*FTE: 0.000000

*Stnd Hrs/Wk:

*Max Head Cnt: 1

*Reports To Pos:

Reports To Name:

*Location Code:

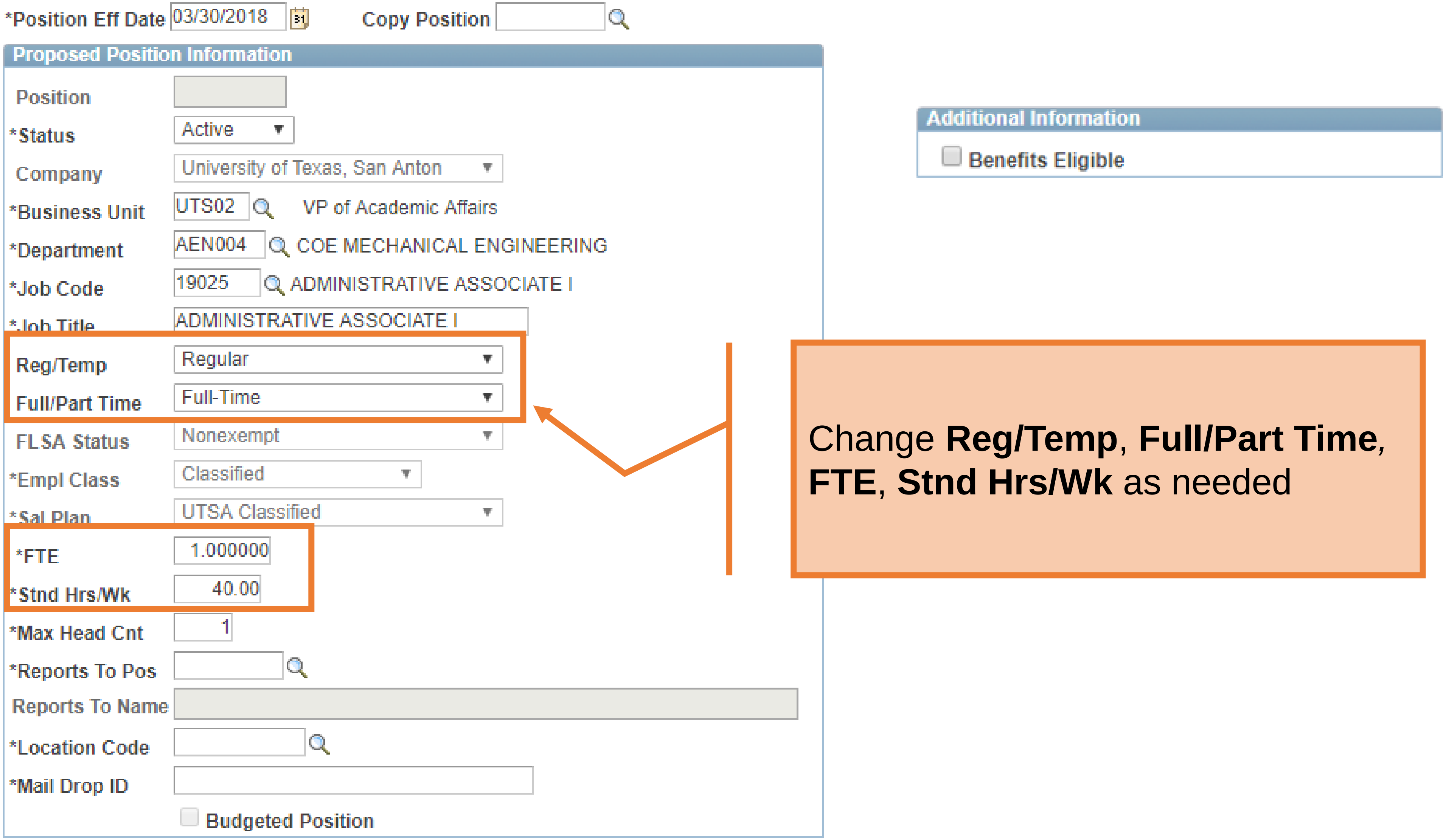
*Mail Drop ID:

☐ Budgeted Position

Additional Information

☐ Benefits Eligible

Enter or look up the **Job Code**. Once entered, the following information will populate: **Job Title, Regular/Temp**, **Full Time/Part Time**, **FLSA Status, Salary Plan**, **FTE**, **Standard hours**, and **Max Headcount**.



*Position Eff Date	03/30/2018
Copy Position	

Proposed Position Information

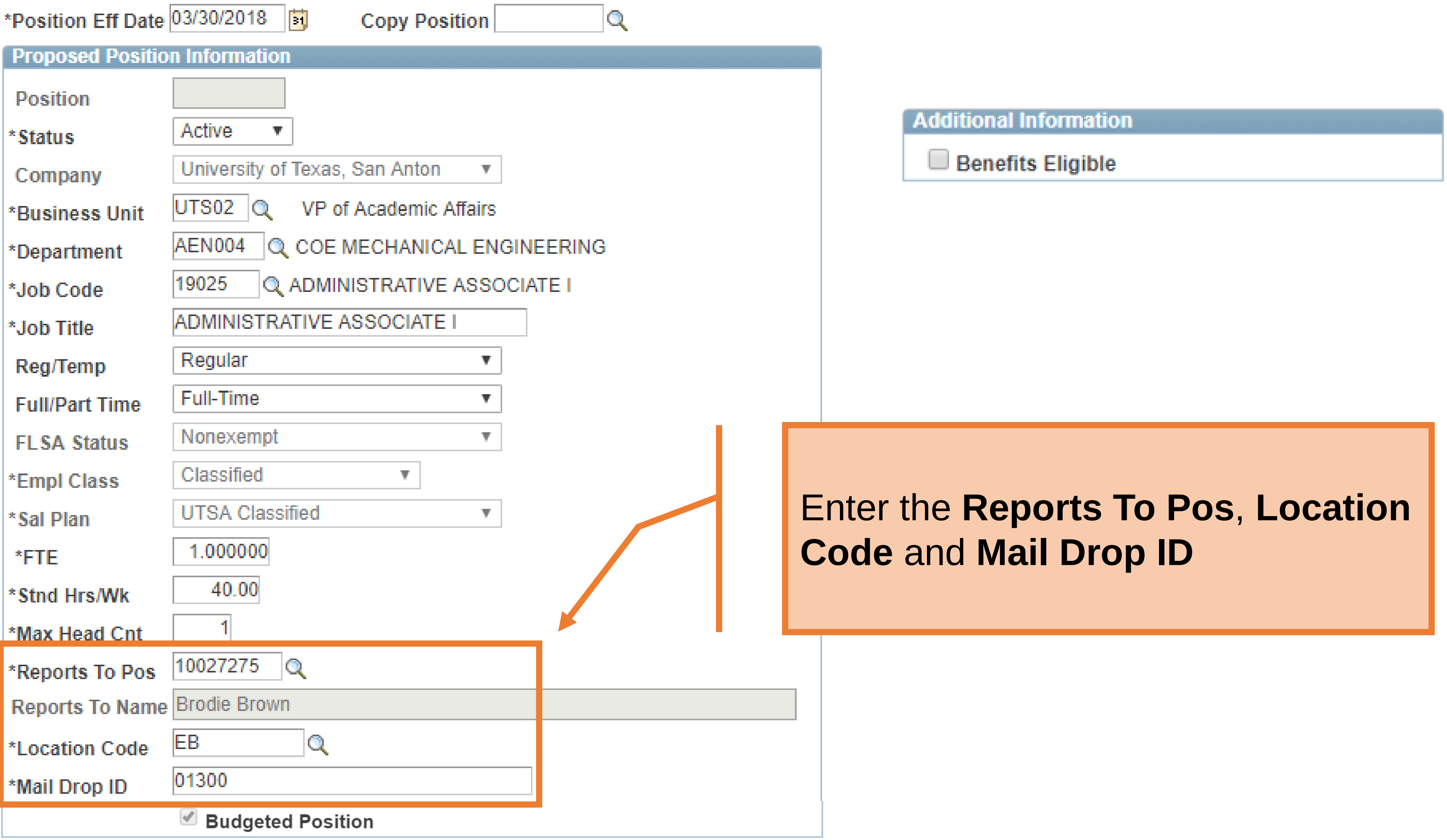
Position	
*Status	Active
Company	University of Texas, San Anton
*Business Unit	UTS02 VP of Academic Affairs
*Department	AEN004 COE MECHANICAL ENGINEERING
*Job Code	19025 ADMINISTRATIVE ASSOCIATE I
*Job Title	ADMINISTRATIVE ASSOCIATE I
Reg/Temp	Regular
Full/Part Time	Full-Time
FLSA Status	Nonexempt
*Empl Class	Classified
*Sal Plan	UTSA Classified
*FTE	1.000000
*Stnd Hrs/Wk	40.00
*Max Head Cnt	1
*Reports To Pos	
Reports To Name	
*Location Code	
*Mail Drop ID	

☐ Budgeted Position

Additional Information

☐ Benefits Eligible

Change **Reg/Temp**, **Full/Part Time**, **FTE**, **Stnd Hrs/Wk** as needed



*Position Eff Date	03/30/2018	Copy Position	

Proposed Position Information

Position		
*Status	Active	
Company	University of Texas, San Anton	
*Business Unit	UTS02	VP of Academic Affairs
*Department	AEN004	COE MECHANICAL ENGINEERING
*Job Code	19025	ADMINISTRATIVE ASSOCIATE I
*Job Title	ADMINISTRATIVE ASSOCIATE I	
Reg/Temp	Regular	
Full/Part Time	Full-Time	
FLSA Status	Nonexempt	
*Empl Class	Classified	
*Sal Plan	UTSA Classified	
*FTE	1.000000	
*Stnd Hrs/Wk	40.00	
*Max Head Cnt	1	
*Reports To Pos	10027275	
Reports To Name	Brodie Brown	
*Location Code	EB	
*Mail Drop ID	01300	

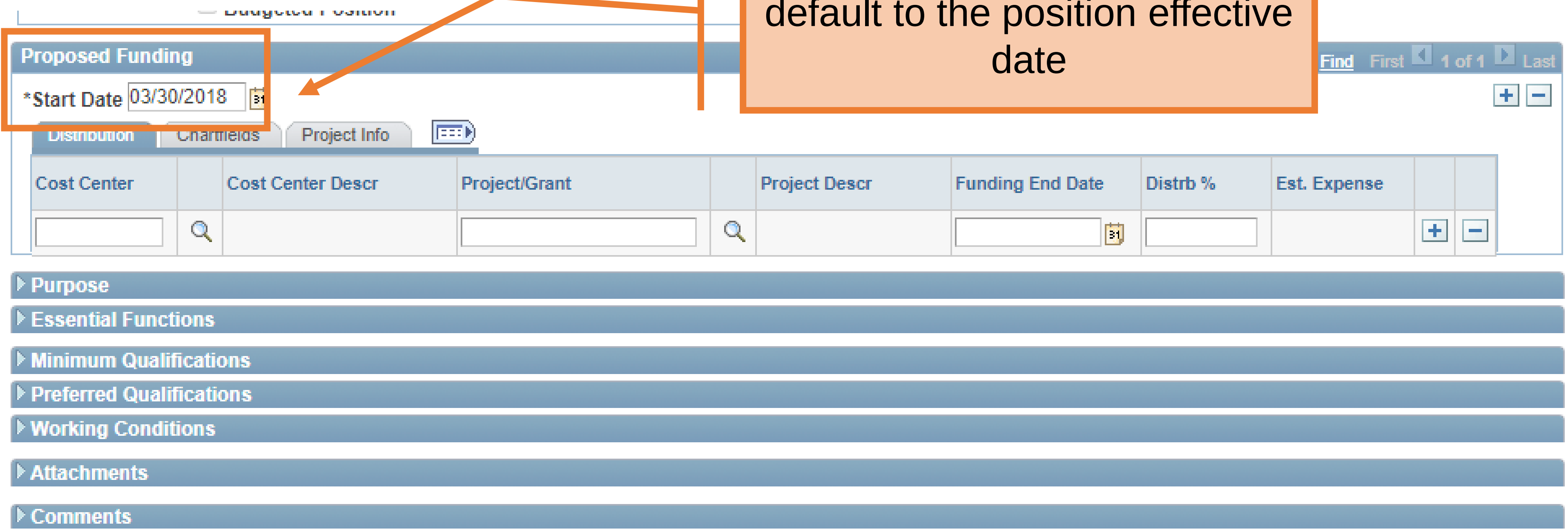
☑ Budgeted Position

Additional Information

☐ Benefits Eligible

Enter the **Reports To Pos**, **Location Code** and **Mail Drop ID**

Under the **Proposed Funding** section, the **Start Date** will default to the position effective date



Budgeted Position

Proposed Funding

*Start Date 03/30/2018

Find
First
1 of 1
Last
Distribution
Chartfields
Project Info

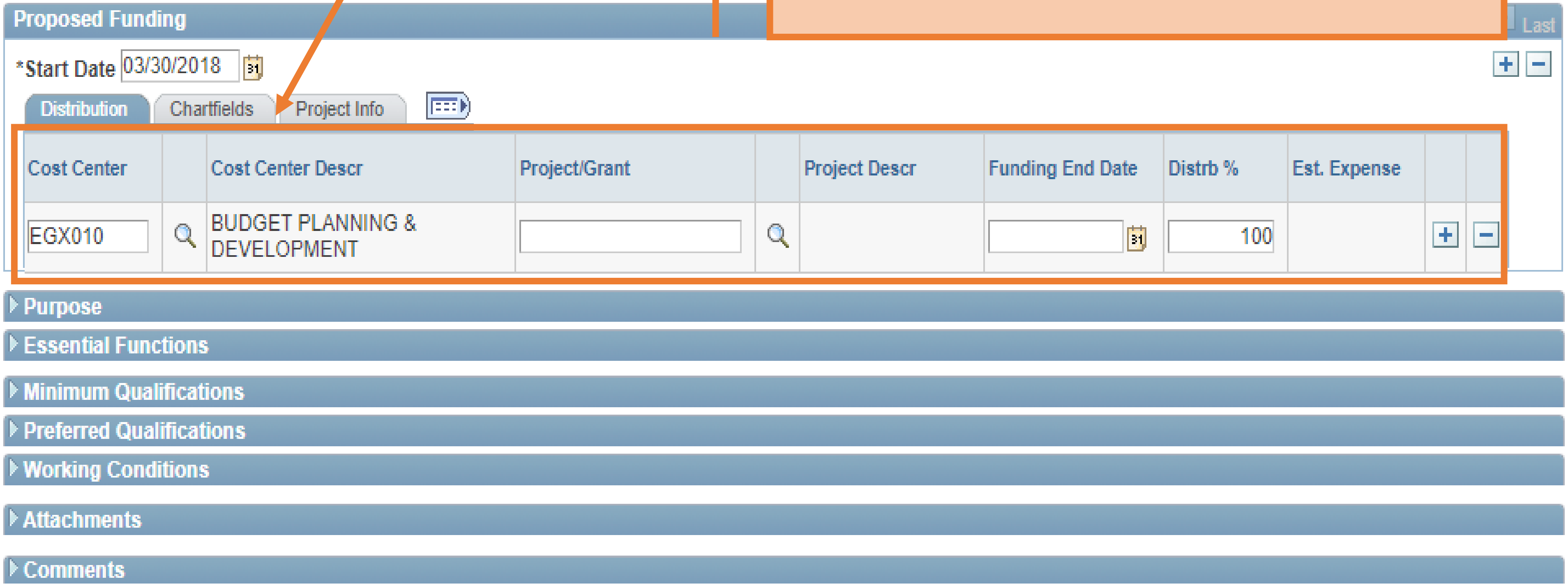
Cost Center		Cost Center Descr	Project/Grant		Project Descr	Funding End Date	Distrb %	Est. Expense		

Purpose
Essential Functions
Minimum Qualifications
Preferred Qualifications
Working Conditions
Attachments
Comments

Enter or lookup the **Cost Center** and/or **Project/Grant** and Distribution.

All funding periods must equal to 100% distribution

If using a Project/Grant, the Funding End Date will default to the Project End Date

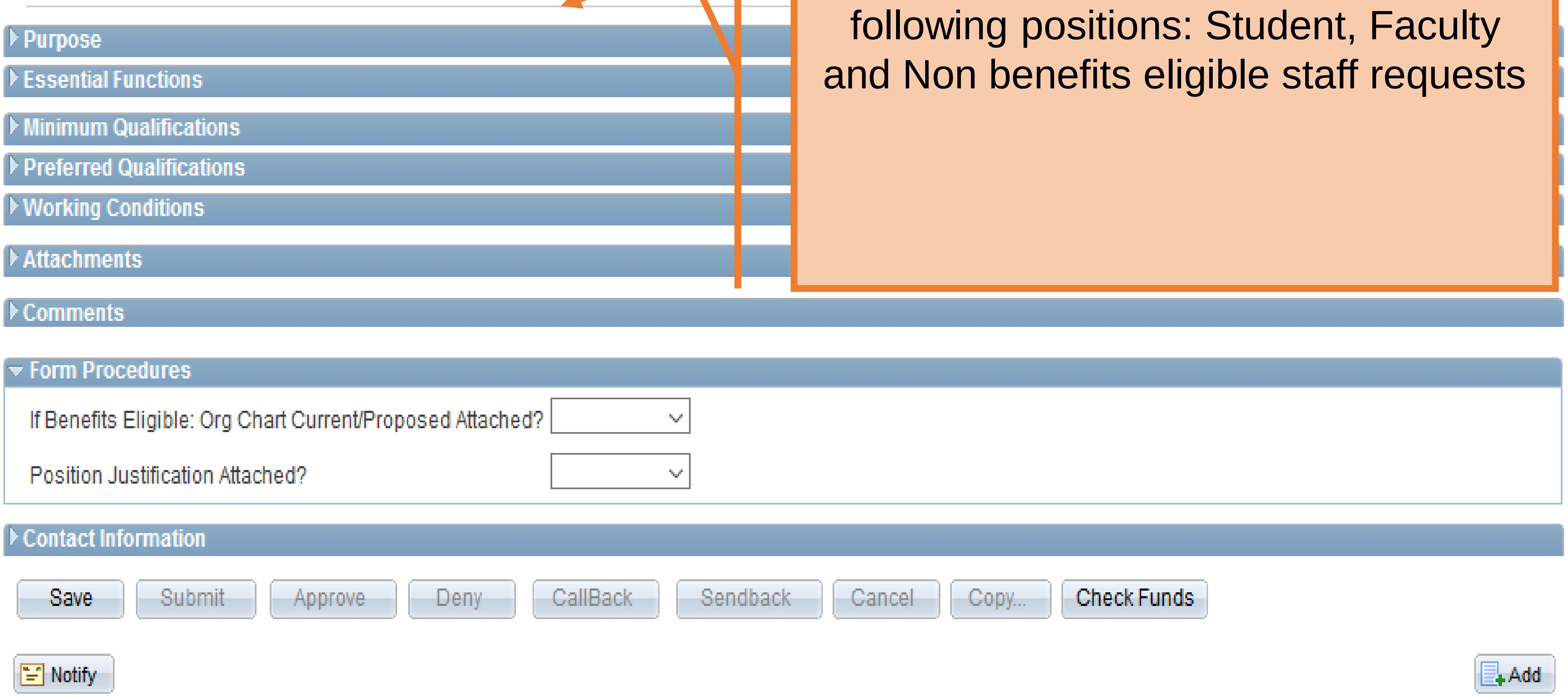

Last
+
−
Distribution
Chartfields
Project Info
Purpose
Essential Functions
Minimum Qualifications
Preferred Qualifications
Working Conditions
Attachments
Comments

Proposed Funding

*Start Date 03/30/2018

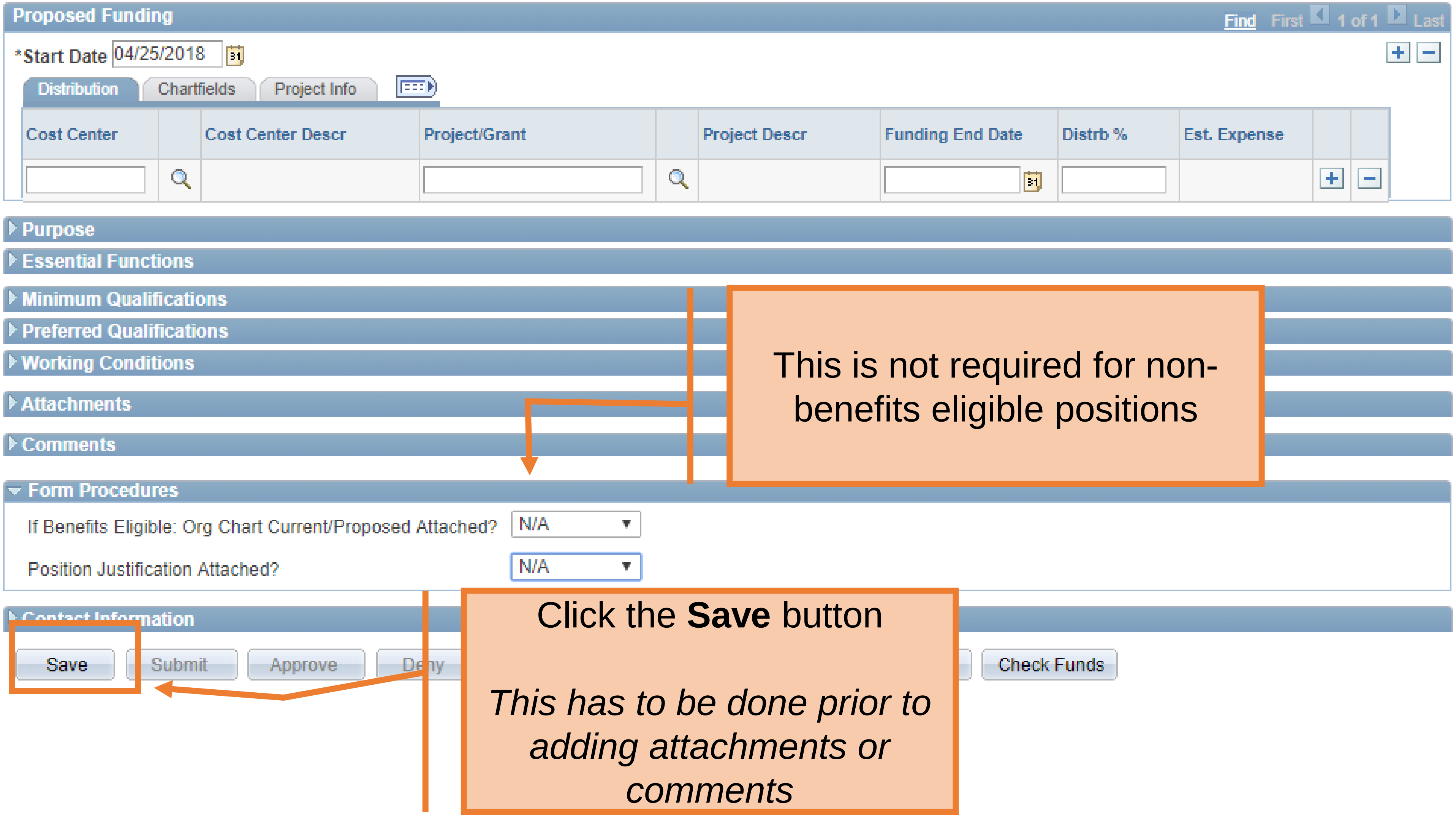
Cost Center		Cost Center Descr	Project/Grant		Project Descr	Funding End Date	Distrb %	Est. Expense		
EGX010		BUDGET PLANNING & DEVELOPMENT					100		+	−

This information is **not required** for the following positions: Student, Faculty and Non benefits eligible staff requests


Purpose
Essential Functions
Minimum Qualifications
Preferred Qualifications
Working Conditions
Attachments
Comments
Form Procedures
Contact Information
Save
Submit
Approve
Deny
CallBack
Sendback
Cancel
Copy...
Check Funds
Notify
Add

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?



Proposed Funding

Find First 1 of 1 Last

*Start Date 04/25/2018

Distribution
Chartfields
Project Info

Cost Center		Cost Center Descr	Project/Grant		Project Descr	Funding End Date	Distrb %	Est. Expense		

- Purpose
- Essential Functions
- Minimum Qualifications
- Preferred Qualifications
- Working Conditions
- Attachments
- Comments
- Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached? N/A

Position Justification Attached? N/A

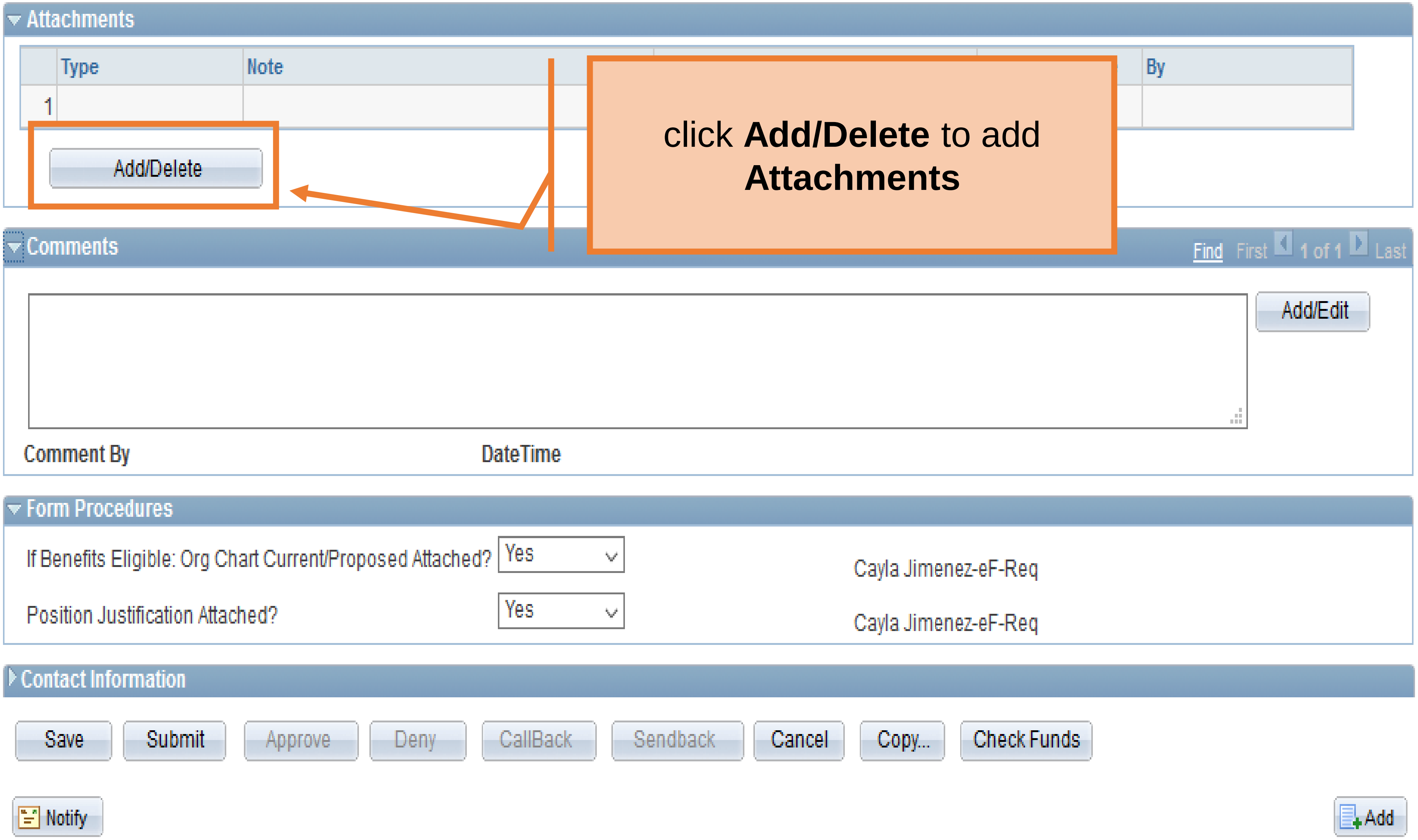
- Contact Information

Save
Submit
Approve
Deny
Check Funds

This is not required for non-benefits eligible positions

Click the **Save** button

This has to be done prior to adding attachments or comments



click **Add/Delete** to add **Attachments**

Attachments
Add/Delete
Comments
Find First 1 of 1 Last
Add/Edit
Form Procedures
Contact Information
Save
Submit
Approve
Deny
CallBack
Sendback
Cancel
Copy...
Check Funds
Notify
Add

Attachments

	Type	Note	By
1			

Comments

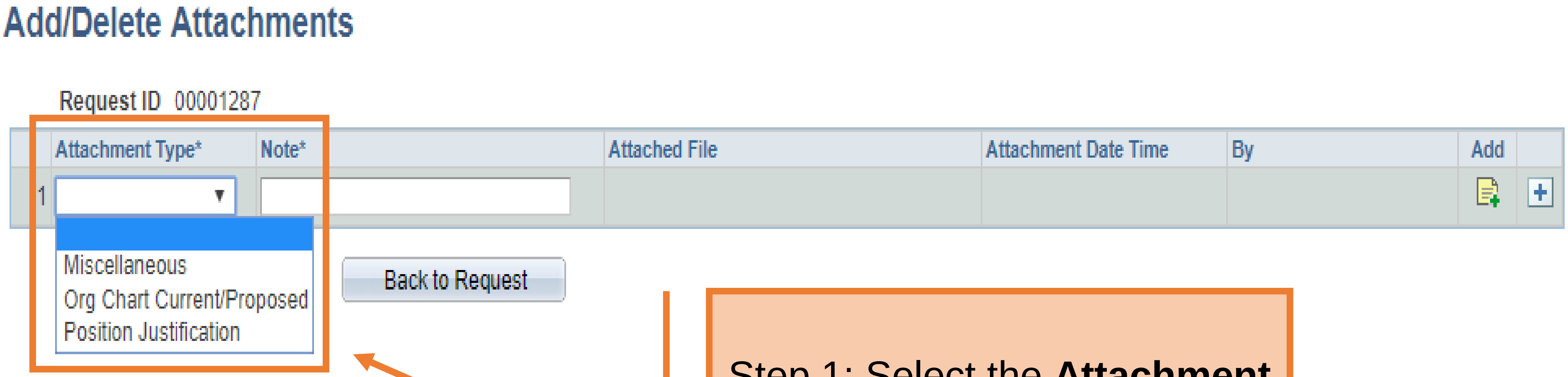
Comment By

DateTime

Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached? Yes — Cayla Jimenez-eF-Req

Position Justification Attached? Yes — Cayla Jimenez-eF-Req



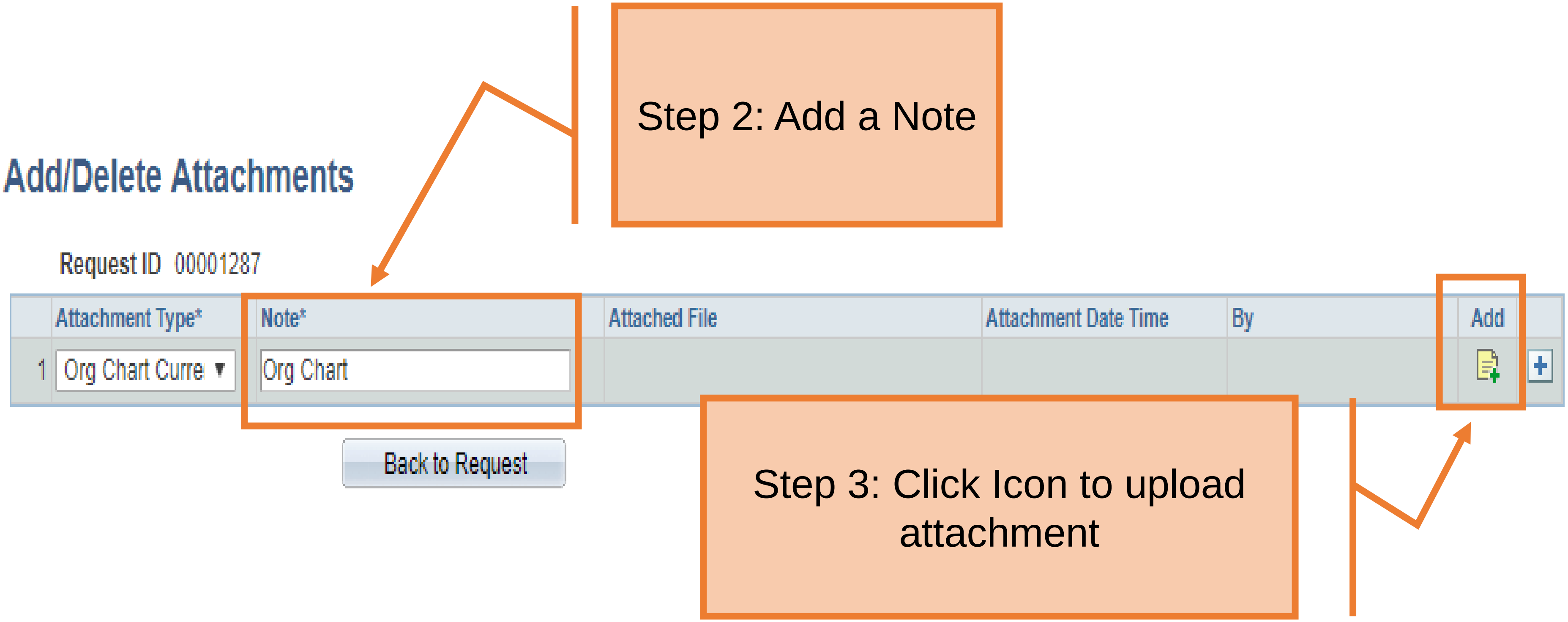
Add/Delete Attachments

Request ID 00001287

	Attachment Type*	Note*	Attached File	Attachment Date Time	By	Add	
1	▼						+

Miscellaneous
Org Chart Current/Proposed
Position Justification
Back to Request

Step 1: Select the **Attachment Type**



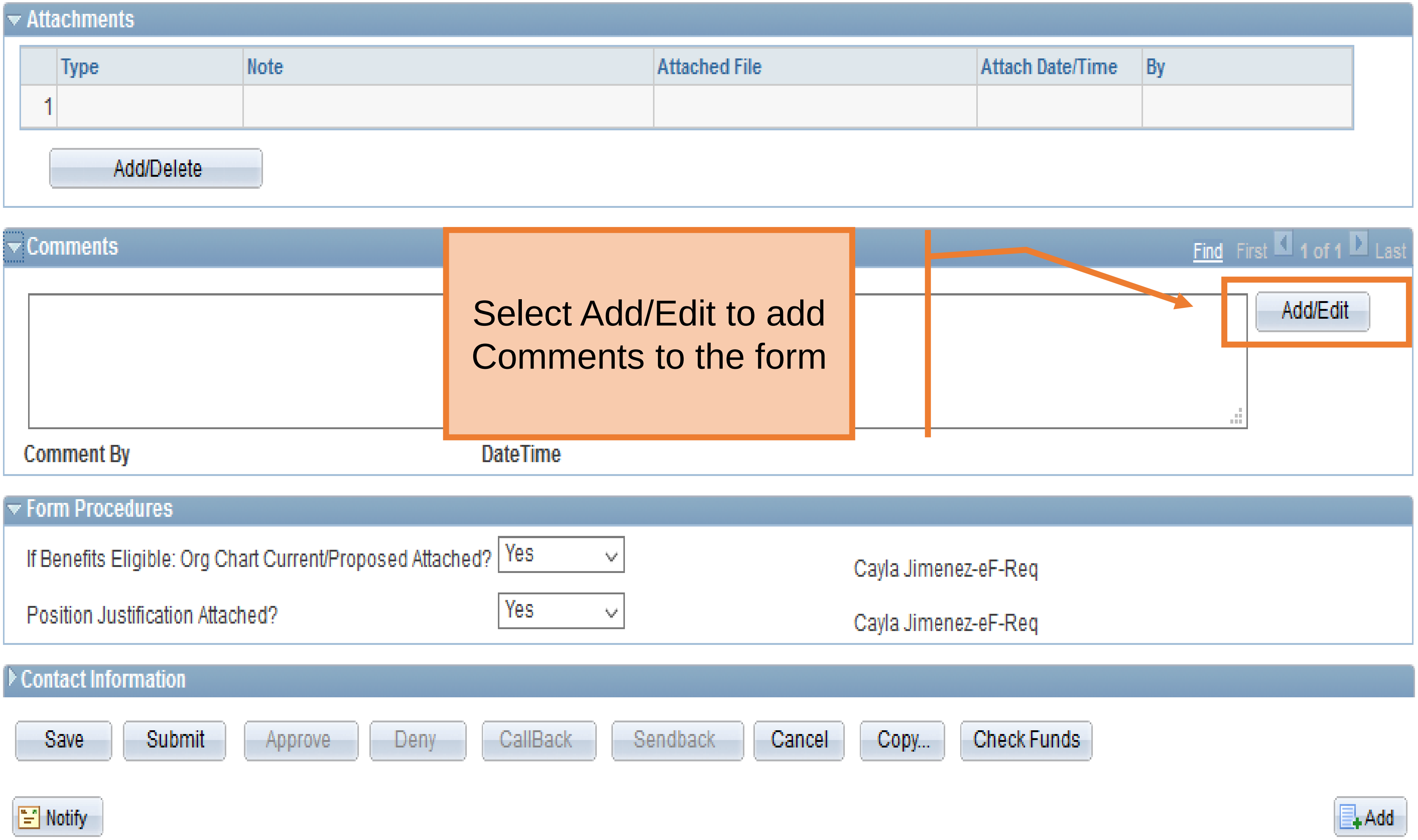
Add/Delete Attachments

Request ID 00001287

	Attachment Type*	Note*	Attached File	Attachment Date Time	By	Add	
1	Org Chart Curre ▼	Org Chart					+

Step 2: Add a Note

Step 3: Click Icon to upload attachment



Select Add/Edit to add Comments to the form

Attachments

	Type	Note	Attached File	Attach Date/Time	By
1					

Comments

Comment By

DateTime

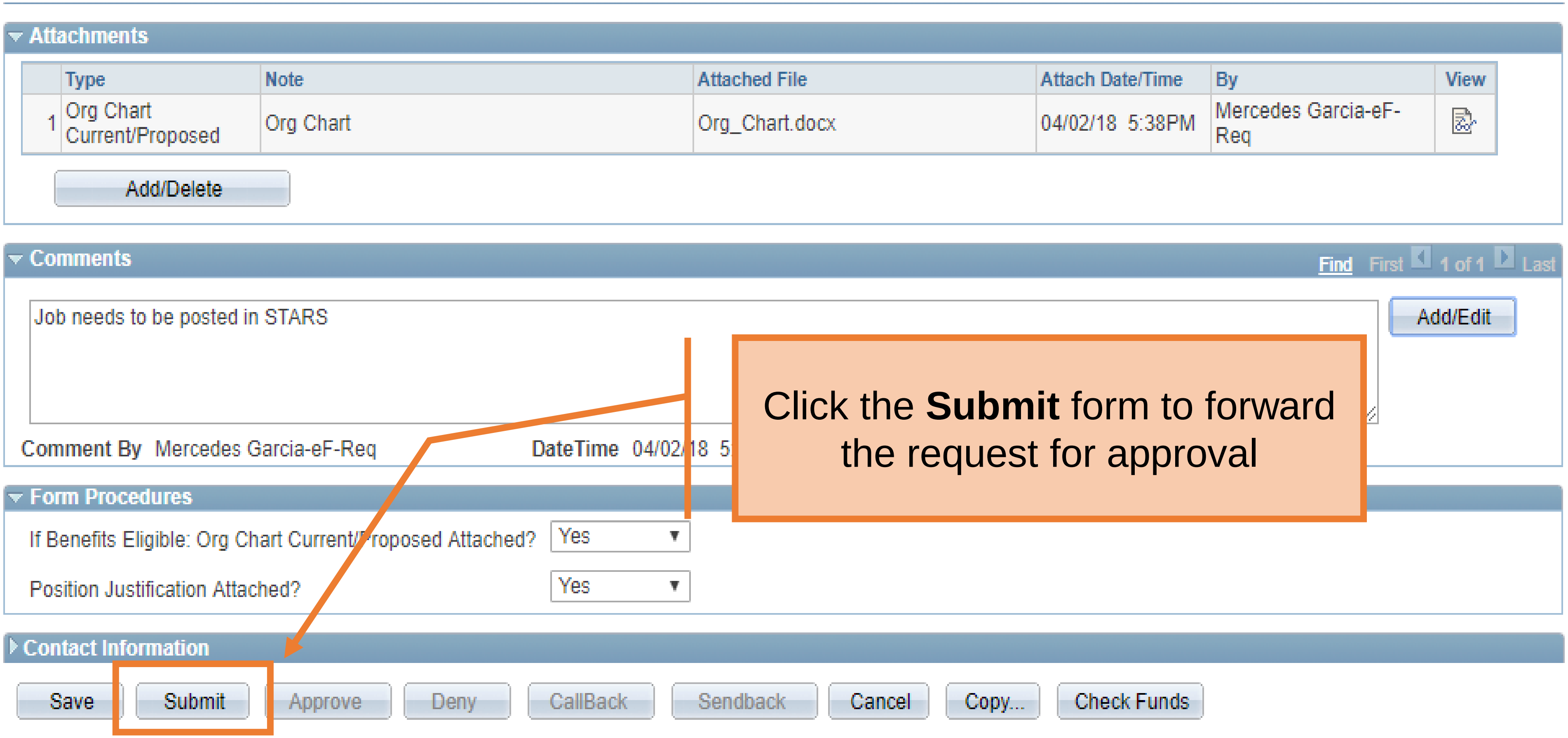
Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached? Yes — Cayla Jimenez-eF-Req

Position Justification Attached? Yes — Cayla Jimenez-eF-Req

Contact Information

Add/Delete
Find First 1 of 1 Last
Add/Edit
Save
Submit
Approve
Deny
CallBack
Sendback
Cancel
Copy...
Check Funds
Notify
Add



Attachments

	Type	Note	Attached File	Attach Date/Time	By	View
1	Org Chart Current/Proposed	Org Chart	Org_Chart.docx	04/02/18 5:38PM	Mercedes Garcia-eF-Req	

Comments

Job needs to be posted in STARS

Comment By Mercedes Garcia-eF-Req

DateTime 04/02/18 5

Form Procedures

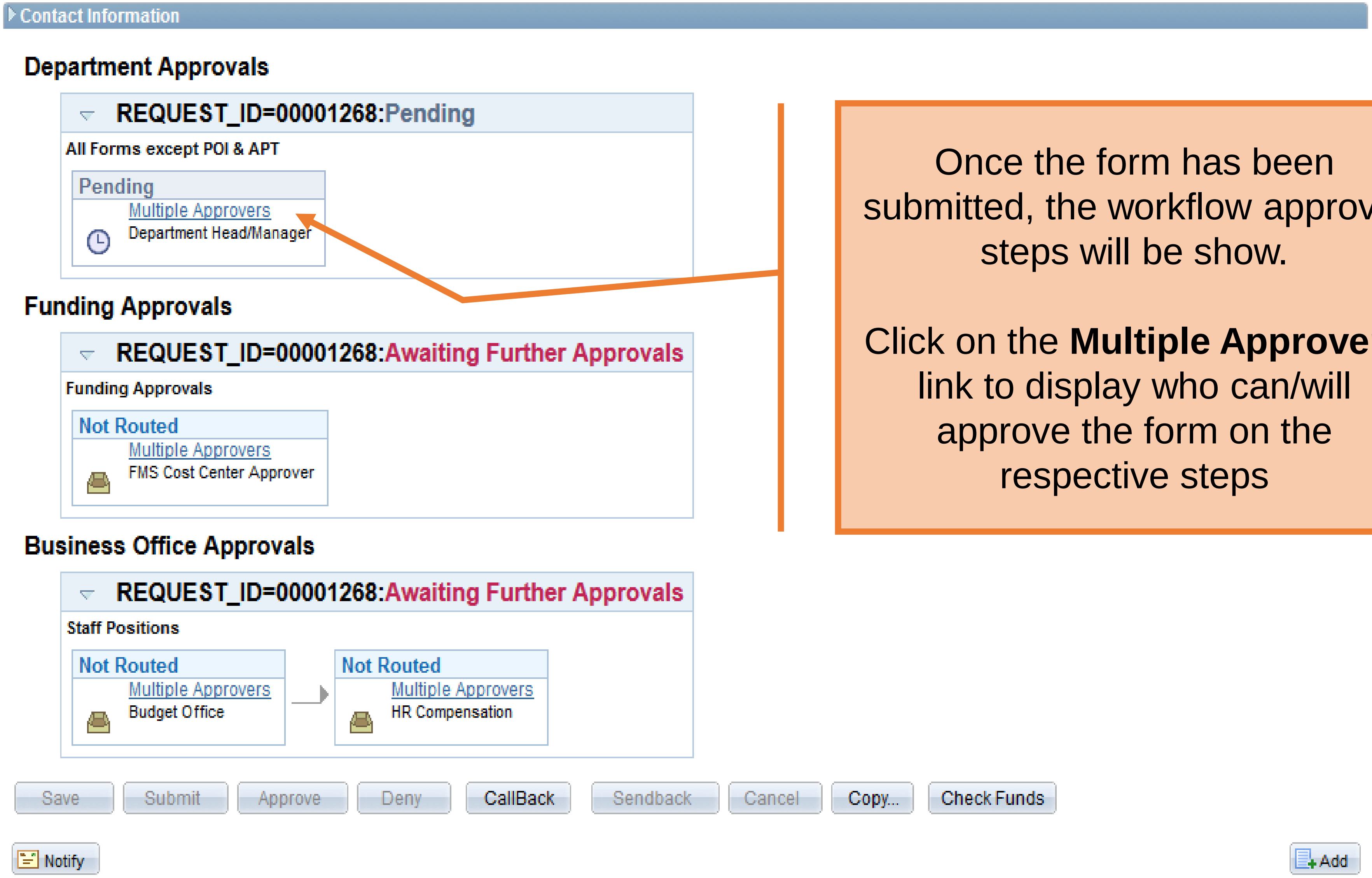
If Benefits Eligible: Org Chart Current/Proposed Attached? Yes

Position Justification Attached? Yes

Contact Information

Add/Delete
Find First 1 of 1 Last
Add/Edit
Save
Submit
Approve
Deny
CallBack
Sendback
Cancel
Copy...
Check Funds

Click the **Submit** form to forward the request for approval



Contact Information

Department Approvals

REQUEST_ID=00001268:Pending

All Forms except POI & APT

Pending
Multiple Approvers
Department Head/Manager

Funding Approvals

REQUEST_ID=00001268:Awaiting Further Approvals

Funding Approvals

Not Routed
Multiple Approvers
FMS Cost Center Approver

Business Office Approvals

REQUEST_ID=00001268:Awaiting Further Approvals

Staff Positions

Not Routed
Multiple Approvers
Budget Office

Not Routed
Multiple Approvers
HR Compensation

Once the form has been submitted, the workflow approval steps will be show.

Click on the **Multiple Approvers** link to display who can/will approve the form on the respective steps

Questions?

Contact:
Human resources
(210) 458-4648

dayone@utsa.edu
compensation@utsa.edu