



eForm Action Types

New Position Request

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

Favorites | Main Menu

Employee Self-Service | mvUTShare

Personalize: Content | La

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

Employee Self Service

- Time Reporting**
[Timesheet](#), [Web Clock](#), [Absen](#)
- 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 Le](#)
 - [IMPORTANT - Pay Advice ESS Instructions](#)
 - [More...](#)
- Finance**
 - [Disbursements & Travel Services \(DTS\) Training Materials](#)
 - [More...](#)
- System Announcements**
 - [Leave Accrual Availability](#)
 - [Paycheck View Availability](#)
 - [Throughout Readiness](#)

Initiate New eForms Request

Action

Actions **Status**

Justification

Request ID

Request Date

[Processing Messages](#)

[Request History](#)

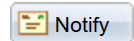
▼ Contact Information

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

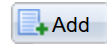
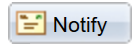
Actions	▼	Status
Justification		
	Appointment	
	Contract Additions and Changes	
	Create Person of Interest	
	End Appointment	
	Leave Of Absence	
	New Position Request	
	Retirement	
	Return From Leave	
	Termination	

▼ Contact Info

Entered By	
Name	
Phone	
Email ID	
Dept ID	
Secondary Co	
Name	
Phone	

Request ID
Request Date
[Processing Messages](#)
[Request History](#)

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



New Position Request

Action

Actions New Position Request Status

*Justification

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

[Request History](#)

*Position Eff Date Copy Position

Proposed Position Information

Position

*Status Active

Company University of Texas, San Anton

*Business Unit VP of Academic Affairs

*Department

*Job Code

*Job Title

Reg/Temp

Full/Part Time

FLSA Status

*Empl Class

*Sal Plan

*FTE

*Stnd Hrs/Wk

*Max Head Cnt

*Reports To Pos

Reports To Name

*Location Code

*Mail Drop ID

Budgeted Position

Additional Information

Benefits Eligible

New Position Request

Action

Actions Status

Request ID

Request Date

*Justification

*Position Eff Date Copy Position

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

Proposed Position Information

Position

*Status

Company

*Business Unit VP of Academic Affairs

*Department

*Job Code

*Job Title

Reg/Temp

Full/Part Time

FLSA Status

*Empl Class

*Sal Plan

*FTE

*Stnd Hrs/Wk

*Max Head Cnt

*Reports To Pos

Reports To Name

*Location Code

*Mail Drop ID

Budgeted Position

Additional Information

Benefits Eligible

New Position Request

Action

Actions Status

*Justification

Request ID
Request Date
[Processing Messages](#)
[Request History](#)

*Position Eff Date

Proposed Position Information

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

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

New Position Request

Action

Actions Status

*Justification

Request ID
Request Date
[Processing Messages](#)
[Request History](#)

*Position Eff Date Copy Position

Proposed Position Information

Position

*Status

Company

*Business Unit VP of Academic Affairs

*Department COE MECHANICAL ENGINEERING

*Job Code

*Job Title

Reg/Temp

Full/Part Time

FLSA Status

*Empl Class

*Sal Plan

*FTE

*Stnd Hrs/Wk

*Max Head Cnt

*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 Status

Request ID
Request Date
[Processing Messages](#)
[Request History](#)

*Justification

*Position Eff Date Copy Position

Proposed Position Information

Position

*Status

Company

*Business Unit VP of Academic Affairs

*Department COE MECHANICAL ENGINEERING

*Job Code

*Job Title

Reg/Temp

Full/Part Time

FLSA Status

*Empl Class

*Sal Plan

*FTE

*Stnd Hrs/Wk

*Max Head Cnt

*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 Copy Position

Proposed Position Information

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

Additional Information

Benefits Eligible

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

*Position Eff Date 03/30/2018

Proposed Position Information

Position	
*Status	Active
Company	University of
*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
*Std Hrs/Wk	40.00
*Max Head Cnt	1
*Reports To Pos	10027275
Reports To Name	Brodie Brown
*Location Code	EB
*Mail Drop ID	01300
<input type="checkbox"/>	Budgeted Position

Select the checkbox if this position is benefits eligible

Additional Information

Benefits Eligible

BENEFITS ELIGIBLE
20 HOURS OR MORE FOR 135 DAYS OR LONGER

*Position Eff Date Copy Position

Proposed Position Information

Position	<input type="text"/>
*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	<input type="text" value="1.000000"/>
*Std Hrs/Wk	<input type="text" value="40.00"/>
*Max Head Cnt	<input type="text" value="1"/>
*Reports To Pos	<input type="text" value="10027275"/> 🔍
Reports To Name	Brodie Brown
*Location Code	EB 🔍
*Mail Drop ID	<input type="text" value="01300"/>
<input checked="" type="checkbox"/> Budgeted Position	

Additional Information

Benefits Eligible

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

Proposed Funding

Find First 1 of 1 Last

*Start Date 03/30/2018

+ -

Distribution Chartfields Project Info

Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	

- ▶ Purpose
- ▶ Essential Functions
- ▶ Minimum Qualifications
- ▶ Preferred Qualifications
- ▶ Working Conditions
- ▶ Attachments
- ▶ Comments

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

▶ Contact Information

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

Proposed Funding
*Start Date 03/30/2018



Find First 1 of 1 Last + -

Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- ▶ 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

Proposed Funding Last

*Start Date 03/30/2018 + -

Distribution
Chartfields
Project Info
...

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

▶ Purpose
 ▶ Essential Functions
 ▶ Minimum Qualifications
 ▶ Preferred Qualifications
 ▶ Working Conditions
 ▶ Attachments
 ▶ Comments

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

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

▶ Contact Information

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

Notify

Add

▼ Purpose

Need to have this position to cover a busy area in our department

▼ Essential Functions

Function Description

% Time

Uses initiative and independent judgment to relieve one or more administrators of many routine matters and decisions.	20
Composes, types, edits, proofreads and produces in final form correspondence, forms, reports and other documents.	15
Develops and oversees the maintenance of office filing systems. Maintains complex and confidential files for administrators	20
Assists in preparing departmental budgets by gathering and compiling information and making recommendations.	25
Collects data from various sources and analyzes for accuracy, completeness and relevance. Prepares complex, statistical, technical, financial,	20

▼ Minimum Qualifications

High School diploma or GED. Four years of increasingly responsible administrative, clerical or office experience. At the department's discretion, a Bachelor's degree may be substituted for experience.

▼ Preferred Qualifications

Bachelors Degree

▼ Working Conditions

Item ID	Description
EC013	May work around standard office conditions.
PT008	Climbing of stairs.

▼ Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

▼ Comments Find First ◀ 1 of 1 ▶ Last

Comment By DateTime

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

This is a reminder to add attachments to your request

▶ Contact Information

Click the **Save** button

This has to be done prior to adding attachments or comments

▼ Attachments

Type	Note	By
1		

Add/Delete

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

▼ Comments Find First 1 of 1 Last

Add/Edit

Comment By DateTime

▼ Form Procedures

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

Position Justification Attached? Cayla Jimenez-eF-Req


▶ Contact Information

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

Notify **Add**

Add/Delete Attachments

Request ID 00001287

	Attachment Type*	Note*	Attached File	Attachment Date Time	By	Add	
1	<input type="text"/>	<input type="text"/>					<input type="button" value="+"/>


- Miscellaneous
- Org Chart Current/Proposed
- Position Justification

Step 1: Select the **Attachment Type**

Add/Delete Attachments

Request ID 00001287

Step 2: Add a Note

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

Back to Request

Step 3: Click Icon to upload attachment

▼ Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

▼ Comments

Find First 1 of 1 Last

Select Add/Edit to add Comments to the form

Add/Edit

Comment By

DateTime

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?	<input type="text" value="Yes"/>	Cayla Jimenez-eF-Req
Position Justification Attached?	<input type="text" value="Yes"/>	Cayla Jimenez-eF-Req

▶ Contact Information

- 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 Find First 1 of 1 Last

Job needs to be posted in STARS

Comment By Mercedes Garcia-eF-Req DateTime 04/02/18 5:38PM

▼ Form Procedures

If Benefits Eligible: Org Chart Current/Proposed Attached?

Position Justification Attached?

▶ Contact Information

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

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

Notify

Add

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