

## 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.

Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID	Dept Name
1	0								

Name and ID	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:

The screenshot shows the 'Employment Information' section. It contains several input fields: \*Hire Type (dropdown), \*Hire Reason (dropdown), \*Start Date (calendar icon), a checkbox for 'Transfer From State Agency', \*Position (text with search icon), and Posting ID (text). Below these is a table titled 'Current and Future Incumbents' with columns: Empl ID, Empl Rcd, Name, and Position Entry Date. The table contains one row with Empl ID '1' and Empl Rcd '0'.

- 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.

The screenshot shows the 'Proposed Job Information' section. It includes fields for \*Empl Class (dropdown, value: Non-Tenure Track Faculty), Comp Frqncy (dropdown, value: Contract), FTE (text, value: 0.500000), \*Proposed 9mo Academic Rate @100% (text), Proposed 9mo Academic Rate @FTE (text), and Proposed Monthly @FTE (text). Below is a 'Contract Information' section with Contract Action (dropdown, value: Create New Contract), Contract # (text), Contract Start Date (calendar icon), Contract End Date (calendar icon), and Contract Worth (text). At the bottom is a 'Contract Options' section with Renewal Indic (checkbox), Renewal Count (text), and Recalculate Flag (checkbox, 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).
- 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:

- **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]

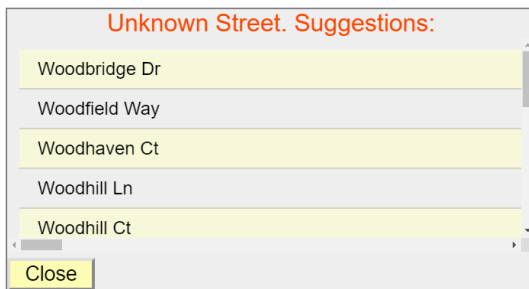
- After entering the address, select the **Clean Address** link to validate that the address provided is a valid postal address.

Proposed Personal Information	
First Name	Jonathan
Mid Name	P
Last Name	Smith
Address 1	1234 Wonder Way <a href="#">Clean Address</a>
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**.

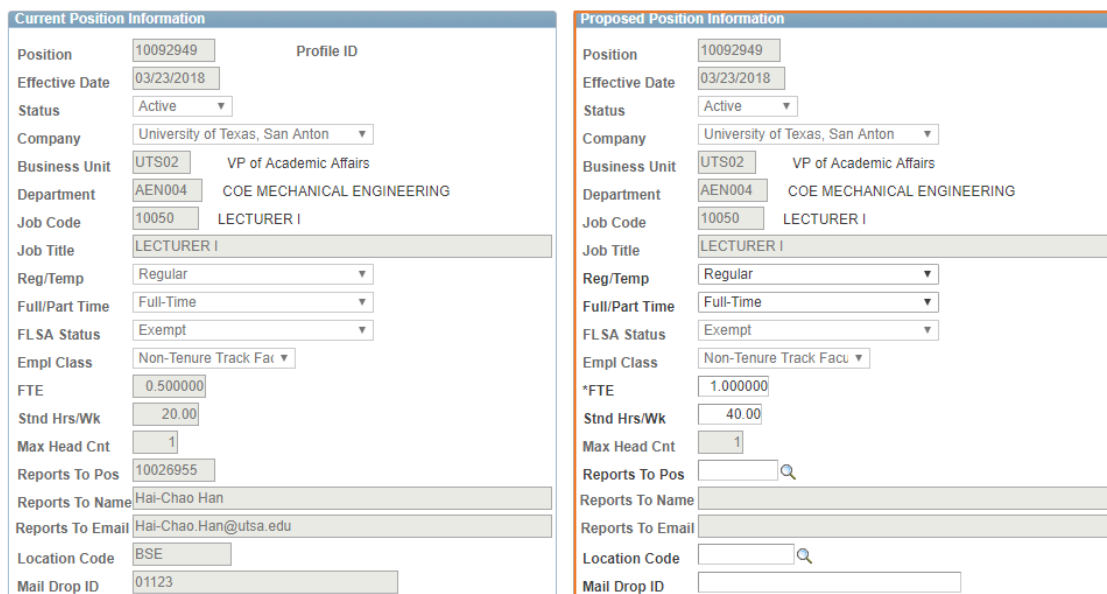
Clean Address	
Effective Date:	07/20/2017
Country	United States
Address 1	1234 Wonder Way
Address 2	[Empty]
Address 3	[Empty]
City	Bedford
State	TX
Postal	76021
County	[Empty]
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
<a href="#">Validate Address</a>	
<a href="#">Clear</a>	
<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.



- 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.



- 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 Charfields 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** Find First 1 of 1 Last

\*Start Date 04/01/2018

Distribution Charfields 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

- 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.
- 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.

**Attachments**

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete

**Comments** Find First 1 of 1 Last

Add/Edit

Comment By DateTime

**Form Procedures**

CBC Submitted? Yes Mercedes Garcia-eF-Req

Date of CBC Submission

Category of CBC Submitted

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

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**

Justification:

Request ID: 00000054  
 Request Date: 06/07/2017  
[Processing Messages](#)  
[Request History](#)

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**Department Approval**

REQUEST\_ID=00000054:Pending

1

Pending  
[Multiple Approvers](#)

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**Business Office Approval**

REQUEST\_ID=00000054:Awaiting Further Approvals

Appointments

Not Routed → Not Routed → Not Routed

Multiple Approvers  
Provost → Multiple Approvers  
Budget Office → Multiple Approvers  
Human Resources

Save Submit Approve Deny Sendback Cancel Copy...