eForms & Grant Personnel

The Office of Research and Scholarship

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The University of Texas at TYLER

Updated June 2021

Agenda

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- eForms Overview
- Create a New eForm
- Person of Interest (POI)
- Create a New Appointment
- Contract Additions & Changes
- Create a New Position
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- Managing eForms
- Workflow
- Managing eForms for Approvers
- Student Workers

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Terminology

- **Employee ID:** A unique 10-digit number assigned to an employee.
- **Empl Record:** Unique number assigned to each job an employee holds (empl record 0, 1, 2, etc.).
- **Empl Class:** employee class is an employee categorization field used to identify an appointment type.
- **Full Time Equivalent (FTE):** Ratio of total hours against a full-time position. (e.g. 1.0=40hrs / .75=32hrs / .5=20hrs)
- **Job Code:** Defines job titles and related classifications such as: FLSA, compensation rate ranges, etc. (all job codes are 5 digits).
- **Effective Date:** This date indicates when an action should occur.
- **Person of Interest (POI):** Individuals with a relationship to a campus but not a traditional "employee" or "worker".

Terminology

- **Earning Code:** Includes components of compensation and are used by Payroll to calculate gross pay.
- **Pay Group:** Defines many of the benefits and earnings.
- **Search Match:** A feature that allows you to search and identify existing employee IDs across PeopleSoft instances.
- **ChartField:** Fields used for accounting information in PeopleSoft. The grouping of ChartField Values is referred to as a "ChartField String".
- **Funds Checking:** A process used to ensure there is adequate funding to cover an expense.
- **Department Budget Table (DBT):** The distribution table that maintains the funding source(s) for each paid position.
- **Budgetary Account:** Used to record budget information.

eForms Overview

What are eForms?

- A PeopleSoft enhancement to process various Human Resources actions that eliminates paper forms
- Streamlines the entire process for completing an approving organizational and personnel transactions
- Forms that allow electronic approval routing, capturing, and updating of data, auditing, and reporting

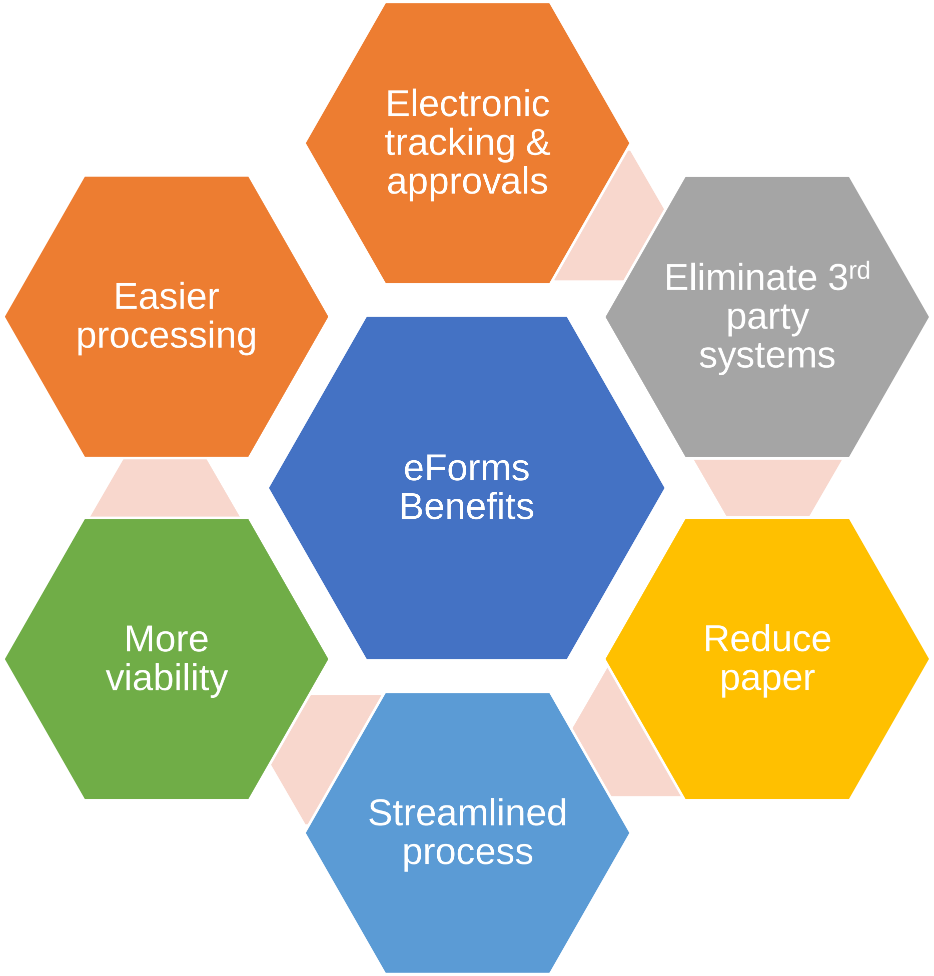
eForms Overview

How does it work?

- Department submits an electronic form (eForm) to request organizational or personnel updates
- eForm electronically routes to the appropriate approvers then to Human Resources for final review and approval
- Once the eForm is final approved and processed, the data is updated in PeopleSoft

Requester submits eForm → Department Approver → Budget Authority → Back Office → Complete

eForms Overview



eForms Overview

Types of eForms:

Action Type	Example
Appointment	Hire, rehire a new or existing employee (includes external transfers)
Contract Additions and Changes	Create a new contract and/or change an existing contract
Person of Interest	Add person of Interest to a POI position
New Position	Create a brand-new position

eForms Overview

Who will use eForms?

- **Requesters:** department users with ability to create new and view existing eForms
- **Approvers:** department heads, managers, or “Reports To” who are able to view and approve submitted eForms
- **Back Office Approver:** processing office approvers—Human Resources, Budgets Office, Grants & Research, Financial Aid, etc.
- **Reviewers**: department users that have the ability to view eForms saved/submitted within their department (view access only)

Create a New eForm

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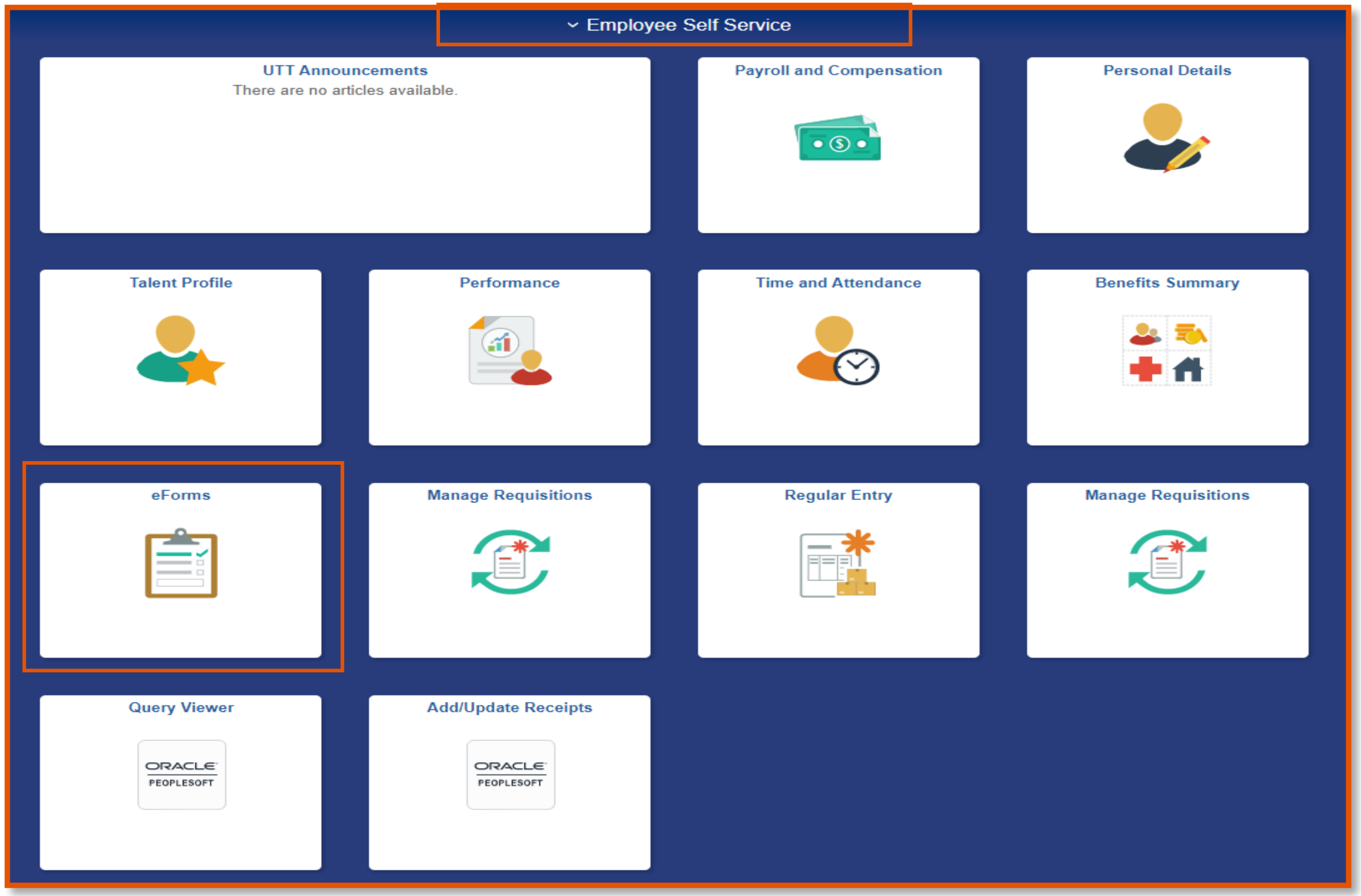
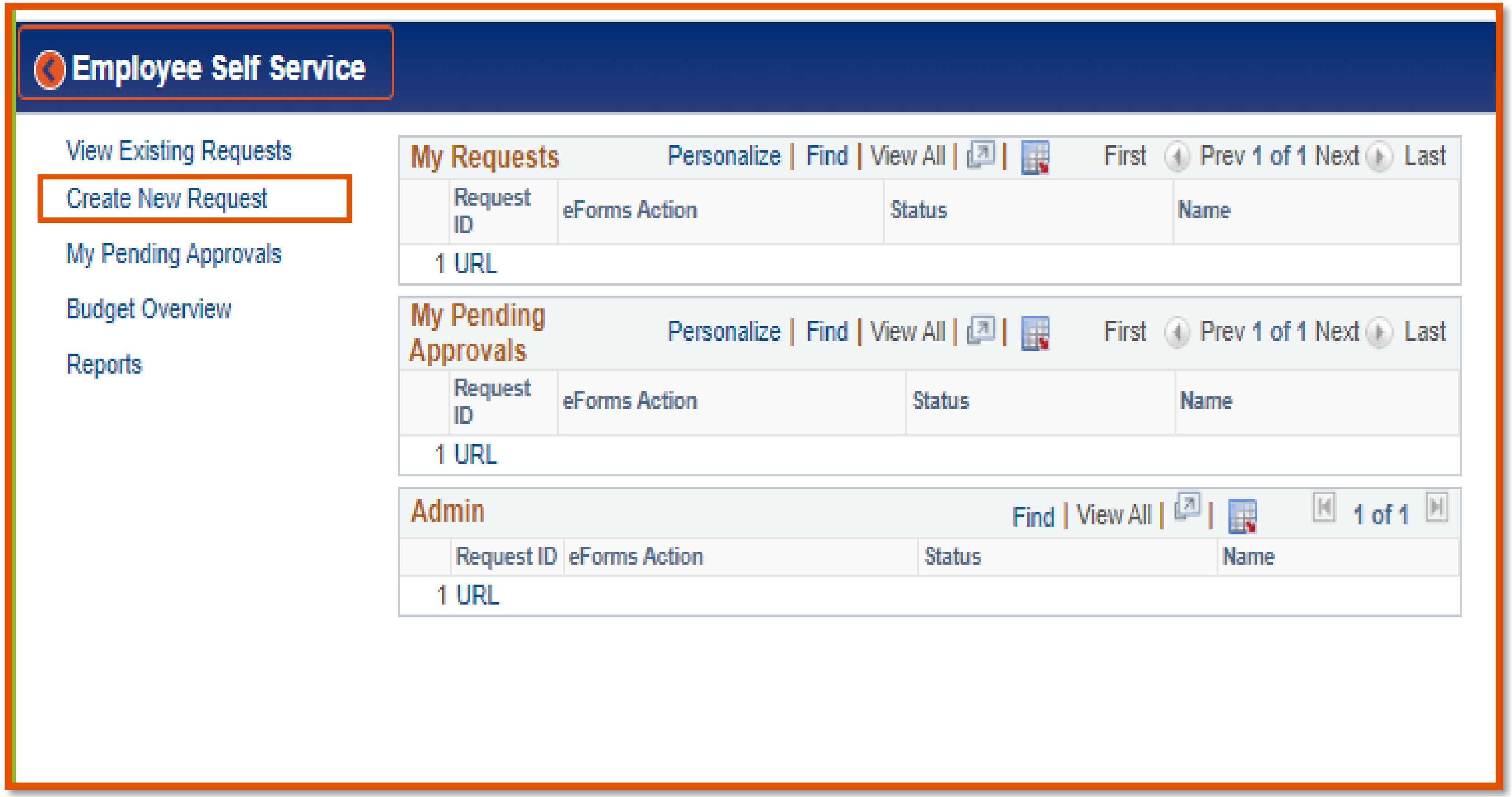
Create a New eForm

From the Employee Self-Service Home Screen click the “eForms” tile.



Create a New eForm

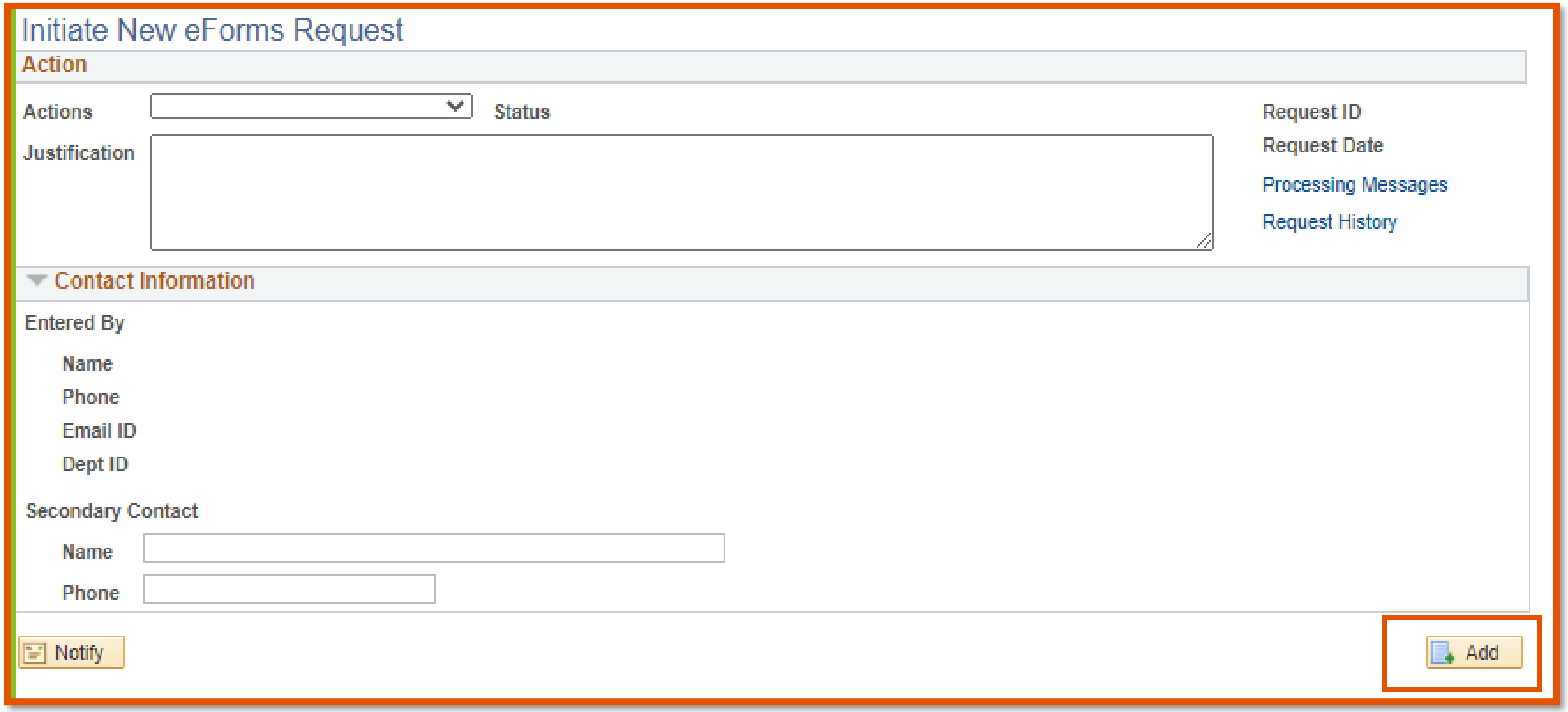
Click “Create New Request” on the side menu.



Create a New eForm

Complete the requested information. Your contact information should be automatically populated in the "Entered By" section.

Then click "Add".



Person of Interest (POI)

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Person of Interest (POI)

- Person of Interest (POI) is an individual performing work for the university (unpaid non-traditional employee)
  - Visiting researchers or students
  - Volunteers
  - Perspective employees
  - Independent contractors

- You use the “Create New Request” eForm to create a POI.

Create a New Appointment

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Create a New Appointment

- The "Create New Request" eForm is also used to assign an incumbent into a position, including:
  - New hire
  - Rehires
  - External transfers
  - Person of Interest

Contract Additions & Changes

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Contract Additions & Changes

- Contracts are used to pay an employee's salary, or contracted amount, within a specified date range (typically used for faculty)
- Once the contracted amount has been paid-payroll is stopped but the employee remains "active"
- The "Create New Request" eForm can be used to create a new contract or update an existing contract.

Create a New Position

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Create a New Position

- The “Create New Request” eForm will be used to create a new position
- Allows department users to request a new position that does not already exist

eForms Features

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eForms Features- Search Match

- The search match feature is used to find existing employees and/or students
- Used to search existing employees from the following campuses:
  - UT Arlington
  - El Paso
  - UT Permian Basin
  - UT San Antonio
  - UT Tyler
  - UT System
- Search match should always be used when appointing an employee

eForms Features- Search Match

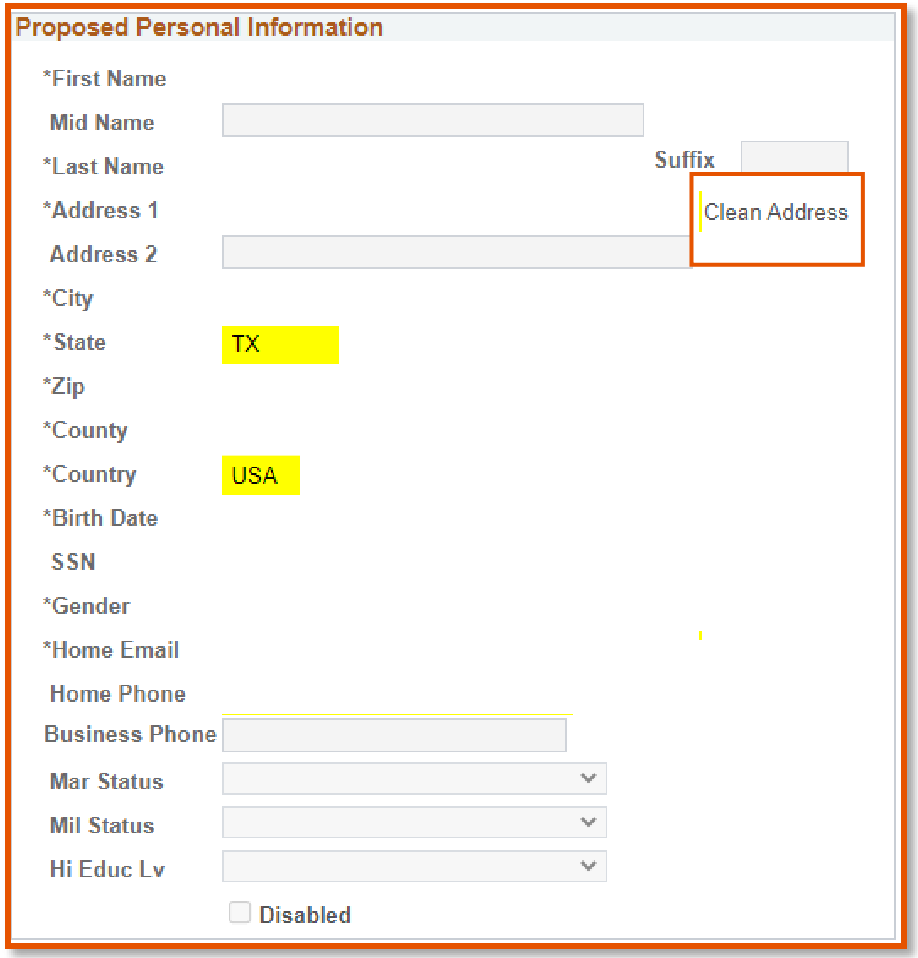
1. Starting from the eForm request “Employee Information” section, click “Search”.

2. Enter the employee information (e.g. Name, DOB, SSN) and click “Search”.

3. If match is found, click “Select” otherwise click ”Cancel”.

eForms Features- Clean Address

1. Starting from the eForm request “Proposed Personal Information” section, click “Clean Address”.
2. Enter the address, if not already entered, click “Validate Address” link and then click “OK”.
3. Message box may appear stating the address is being verified, click “OK”.



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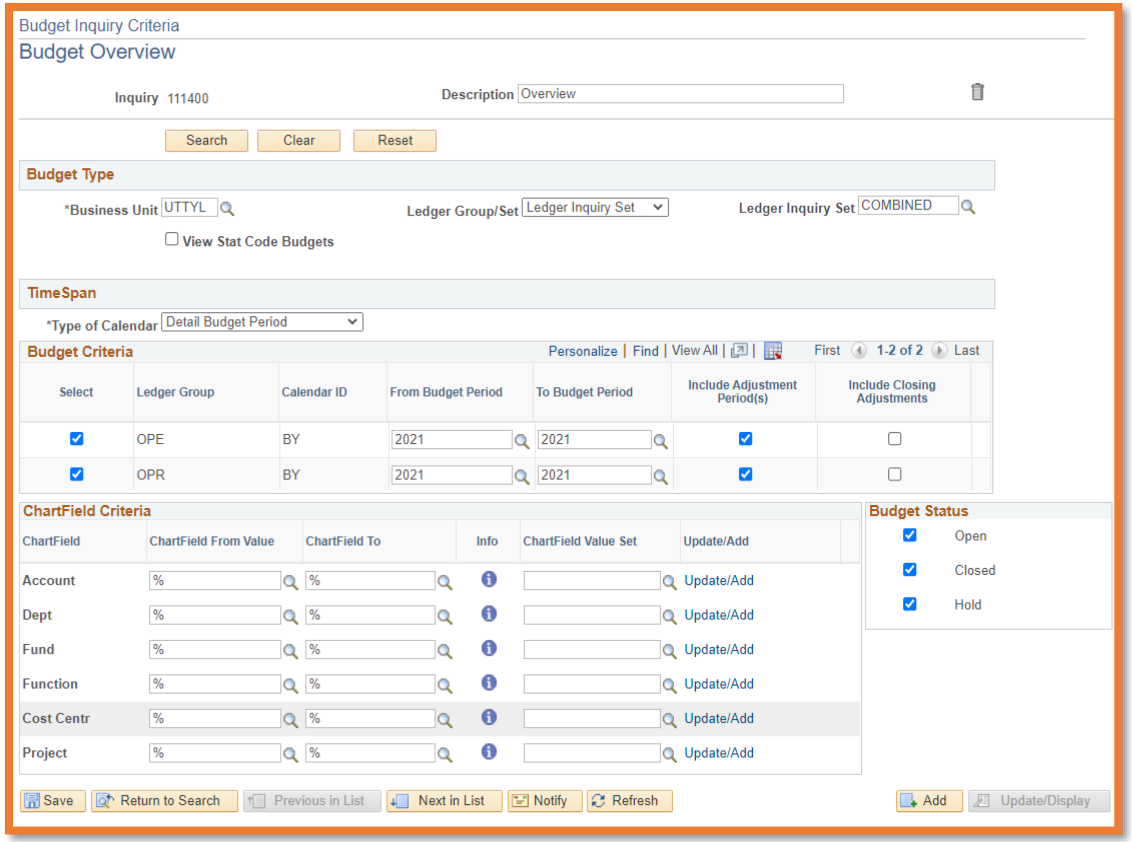
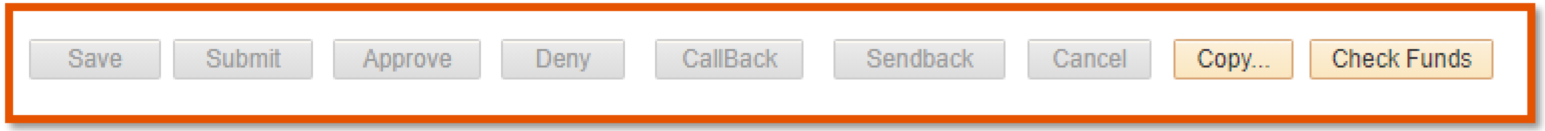
eForms Features- Budget Overview

- The eForms Budget Overview feature allows users to view their department’s budget
- Accessible within the eForm upon Save/Submit
- Direct page allows users to view all the department’s cost centers and/or sponsored projects
- To access this from the home page select “Accounting & Financial Reports”
- Click the “Budgets Overview” tile



eForms Features- Budget Overview

- When an eForm is Saved or Submitted, the “Check Funds” page displays budget information



Blue = the current pending eForm

Pink = other pending eForm requests

Yellow = insufficient funds

Red = overall budget overdrawn

Review Available Funds

Cost Center

Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Actuals Paid	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	1,227,733.03	0.00	-625,076.65	445,787.75	0.00	156,868.63	49,528.54	20,549.90	14,678.48	14,300.16	142,568.47
00094396	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	14,024.40	0.00	0.00	14,024.40	0.00
00122515	51101	SW Admin Prof	0.00	0.00	0.00	0.00	0.00	0.00	23,761.36	0.00	0.00	23,761.36	0.00
00194528	51101	SW Admin Prof	0.00	0.00	0.00	0.00	0.00	0.00	11,742.78	20,549.90	14,678.48	-23,485.60	0.00
	A1200	Wages	50,000.00	0.00	-34,848.05	0.00	0.00	15,151.95	356.48	0.00	0.00	356.48	14,795.47
00014173	51210	SW Classified Temp	0.00	0.00	0.00	0.00	0.00	0.00	356.48	0.00	0.00	356.48	0.00
	A2000	Faculty & TA Salaries	3,641,942.70	0.00	-2,560,277.60	771,847.34	0.00	309,817.76	58,690.22	80,560.99	23,017.42	-44,888.19	354,705.95
00194531	50205	SW Non Tenure Track	0.00	0.00	0.00	0.00	0.00	0.00	5,611.02	39,277.18	11,222.04	-44,888.20	0.00
00165970	50205	SW Non Tenure Track	0.00	0.00	0.00	0.00	0.00	0.00	53,079.20	41,283.81	11,795.38	0.01	0.00
	A3000	Payroll Related Costs	1,343,379.84	0.00	-982,690.39	5,280.00	0.00	355,409.45	0.00	0.00	0.00	0.00	355,409.45
	A4000	Operating Expenses	1,815,146.58	0.00	-377,366.55	249,781.96	278,000.00	909,998.07	0.00	0.00	0.00	0.00	909,998.07
	A7000	Expense Transfers	400,000.00	0.00	-400,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		8,478,202.15	0.00	-4,980,259.24	1,472,697.05	278,000.00	1,747,245.86	108,575.24	0.00	37,695.90	-30,231.55	1,777,477.41

Managing eForms

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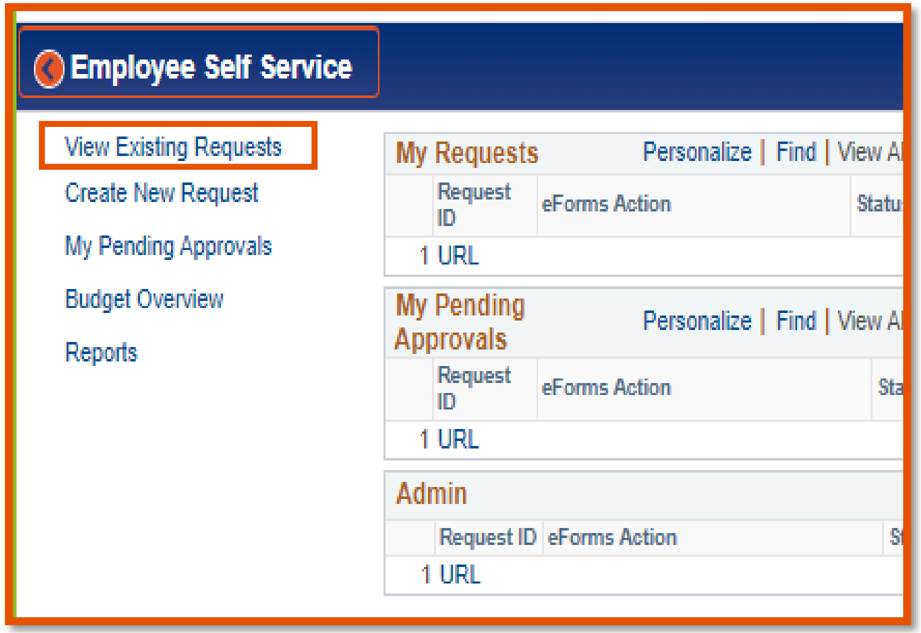
Managing eForms

View an Existing eForm

- Find and view existing eForms for your department by:
  - Clicking "eForms" tile from the main menu and then clicking "View Existing Requests" from the side menu
- Search options:
  - Request ID
  - Action Type
  - Status
  - Empl ID or Name
  - Position number, Department, Job Code, etc.
  - Action Reason
  - Request Date



Managing eForms

Copy an eForm

- The copy feature allows users to copy existing Saved or Submitted eForms within your department
  - *Note: users will not have the option to copy forms created by requesters outside their department*
- Starting from the eForms Action Request page:
  1. Enter search criteria & select an eForm
  2. At the bottom of the eForm Request, select "Copy"
  3. Click "OK" from the message box

Workflow

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Workflow

- Workflow is an electronic routing and approval process for eForms
- After a requester submits an eForm, Workflow begins and the eForm routes to pre-defined approvers
- Each workflow stage will contain an individual approver or a group of approvers (e.g., Budget Office, HR, etc.)
- As the request passes through each approval stage, the approver is responsible for:
  - Reviewing and verifying the information
  - Approving the request to move forward to the next stage, denying or returning the request for changes

Workflow Notifications

- Once an eForm has been submitted, an email notification is sent to each approver

From: eForms@utsystem.edu <eForms@utsystem.edu>
Sent: Wednesday, April 14, 2021 5:54 PM
To:
Subject: ACTION: eForm Request NEEDS APPROVAL

Hello,

An eForm Request needs your approval. Please log in and take the appropriate actions here.

Action:
Request ID:
Request Date:
Dept:
Position Number:
Title:
Incumbent Name:
JOBCODE:

Managing eForms for Approvers

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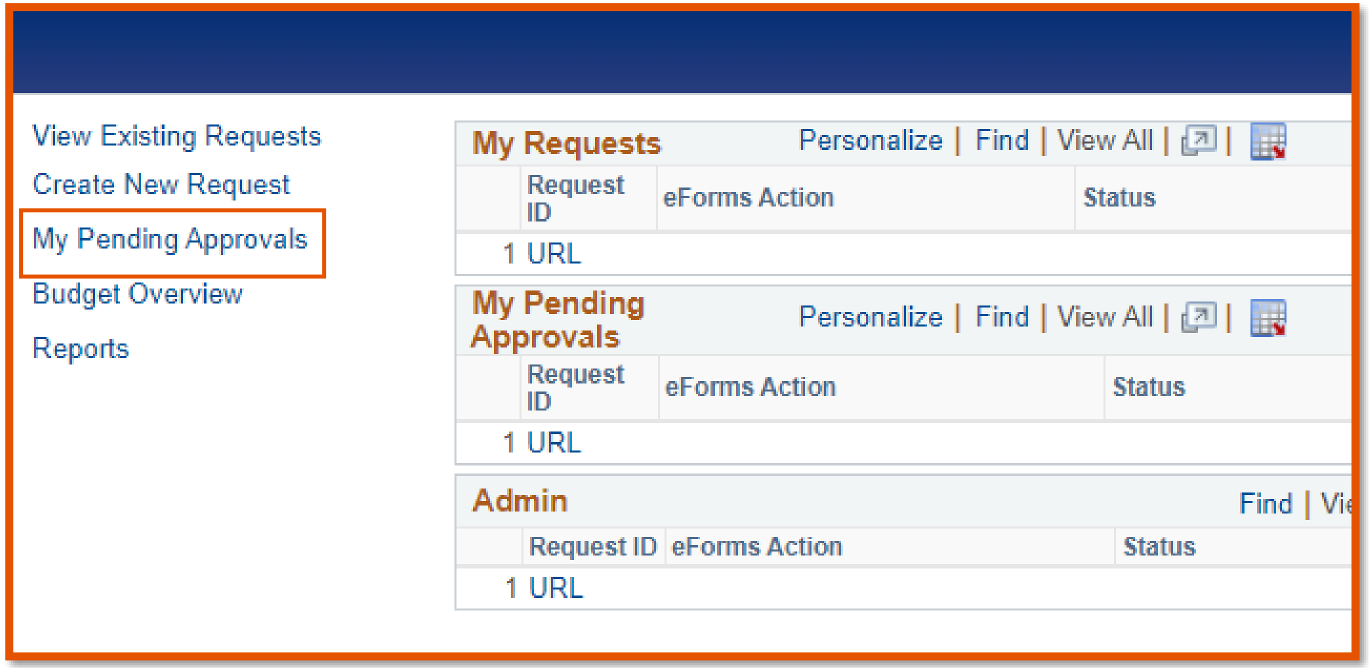
Managing eForms-Approvers

- Requester submits an eForm and then it electronically routes to the appropriate approvers
- Each approver will review the eForm for accuracy
- Once the eForm has been fully reviewed, the approver can complete one of the following:
  - Approve: the form is approved and moves on to the next approver
  - Deny: cancels the request completely and no further action can be taken (comments required)
  - Send Back: the request is sent back to the requester for changes (comments required)

Managing eForms-Approvers

"My Pending Approvals"

- Option 1: Click on the link in the email workflow notification
- Option 2: Use the "My Approvals" link on the eForms side menu



Managing eForms-Approvers

Option 1

- Select the link provided in the email notification
- If not logged in already, the approver will be prompted to log into PeopleSoft
- Once logged into the system, the eForm is displayed

From: eForms@utsystem.edu <eForms@utsystem.edu>
Sent: Wednesday, April 14, 2021 5:54 PM
To:
Subject: ACTION: eForm Request NEEDS APPROVAL

Hello,

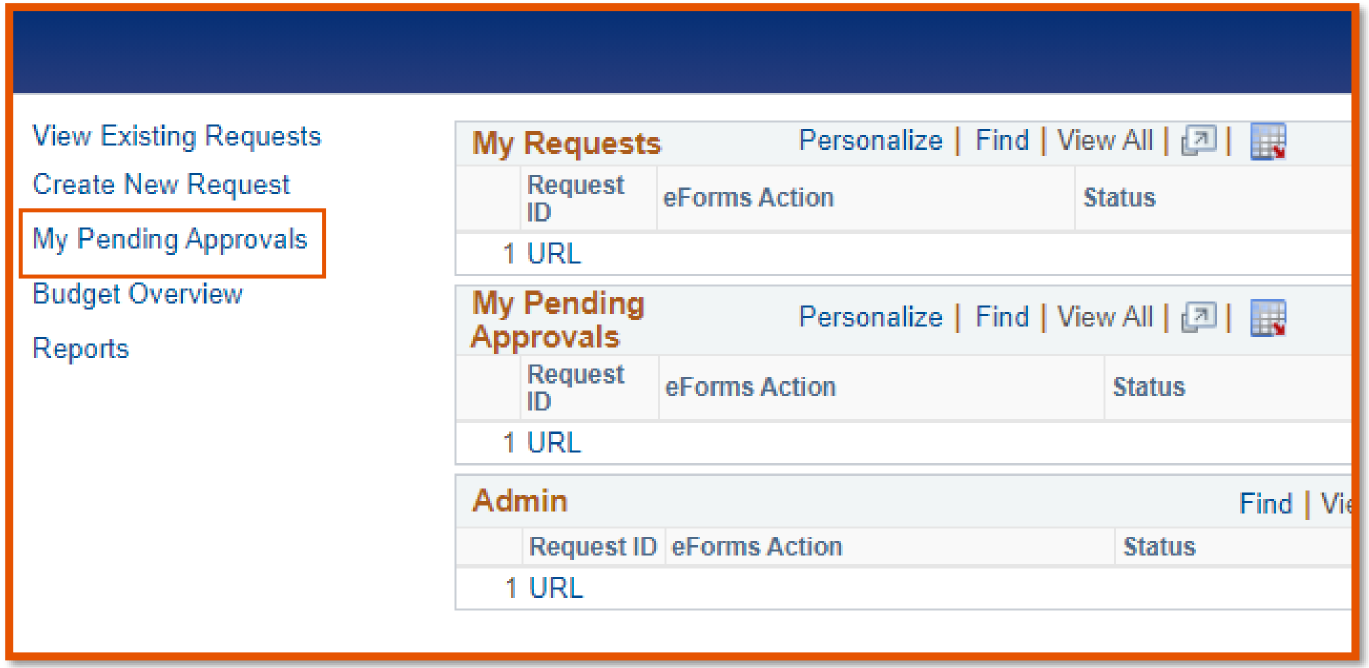
An eForm Request needs your approval. Please log in and take the appropriate actions here.

Action:
Request ID:
Request Date:
Dept:
Position Number:
Title:
Incumbent Name:
JOBCODE:

Managing eForms-Approvers

Option 2

- Log into PeopleSoft
- From the homepage click the “eForms” tile
- Then click “My Pending Approvals” and a page is displayed with any pending eForms



Student Workers

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Part Time Student Job Codes & Rates

Job Code	Title	General Description of Duties	Hourly Minimum	Hourly Maximum	Monthly Minimum	Monthly Maximum
10065	Undergrad Assistant	Perform general office duties including but not limited to answering telephones, typing, filing, and photocopying. Provide clerical support to University employees which may include conducting background research, maintaining records, and/or assisting with special projects related to the department.	$7.25	$15.00	N/A	N/A
10066	Undergrad Research Assistant	Work under the direction of faculty for the collection, evaluation, and reporting of research data. Use various equipment, materials, and methods to accurately perform research. Position may require travel.	$7.25	$15.00	N/A	N/A
10067	Graduate Assistant	Responsible for assisting faculty and other University personnel with complex clerical and/or administrative assignments. Duties may include grading.	$7.25	$20.00	N/A	N/A
10076	Workstudy Student	Perform general office duties including but not limited to answering telephones, typing, filing, and photocopying. Provide clerical support to University employees which may include conducting background research, maintaining records, and/or assisting with special projects related to the department.	$7.25	$15.00	N/A	N/A

Part Time Student Job Codes & Rates Continued

Job Code	Title	General Description of Duties	Hourly Minimum	Hourly Maximum	Monthly Minimum	Monthly Maximum
10064	Graduate Research Assistant	Responsible for assisting faculty with a research project/agenda. The research project/agenda must be faculty-supervised. The duties may involve data collection/processing, writing, editing, library research, and/or science lab work.	N/A	N/A	$1,993.00	$3,943.00
10069	Graduate Teaching Assistant	Responsible for assisting 1 or more faculty members with teaching and other activities related to the course. The action form must indicate that the graduate assistant is not instructor of record (IOR).	N/A	N/A	$1,795.00	$4,102.00
10070	Doctoral Research Assistant	Responsible for assisting faculty with a research project/agenda. The research project/agenda must be faculty-supervised. The duties may involve data collection/processing, writing, editing, library research,	N/A	N/A	$2,340.00	$4,853.00
10071	Doctoral Teaching Assistant - Instructor Of Record	May be assigned to one or both of the following: (a) primary classroom teaching (instructor of record or IOR) of at least 1 formally organized course involving serving as instructor of record, assigning final grades, holding office hours, and/or participating in systematic in-service training; (b) assisting 1 or more faculty members with teaching and other activities related to the course.	N/A	N/A	$2,308.00	$4,487.00

Part Time Student Job Codes & Rates Continued

Job Code	Title	General Description of Duties	Hourly Minimum	Hourly Maximum	Monthly Minimum	Monthly Maximum
10072	Doctoral Teaching Assistant	Responsible for assisting 1 or more faculty members with teaching and other activities related to the course. The graduate assistant is not instructor of record (IOR).	N/A	N/A	$2,308.00	$4,487.00
10073	Graduate Teaching Assistant - Instructor Of Record	May be assigned to one or both of the following: (a) primary classroom teaching (instructor of record or IOR) of at least 1 formally organized course involving serving as instructor of record, assigning final grades, holding office hours, and/or participating in systematic in-service training; (b) assisting 1 or more faculty members with teaching and other activities related to the course.	N/A	N/A	$1,795.00	$4,102.00

UT Tyler Policy

- Click to see the [UT Tyler Graduate Assistantship Policy] for definitions, requirements, and more related to hiring graduate student workers.

UT TYLER GRADUATE ASSISTANTSHIP POLICY

GENERAL

The following policy addresses issues ranging from eligibility, appointment processes, work assignment, oversight, and evaluation of graduate assistants. A full-time graduate student may not work or be paid under any employment classification at UT Tyler other than Graduate Assistant, Graduate Research Assistant or Graduate Teaching Assistant. In addition, principal investigators should include payment of stipends and tuition for Graduate Research Assistants in all grant proposals, unless prohibited by the granting agency.

Office of Research and Scholarship

Please contact the Office of Research and Scholarship with questions/concerns regarding research related eForms and HR for all other eForm questions. Additional synchronous training is available for all faculty and staff by contacting research@uttyler.edu or (903)565-5858. Additional asynchronous training is available on the ORS Faculty Development Workshops website.

Humanresources@uttyler.edu

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