



UTTyler[™]
THE UNIVERSITY OF TEXAS AT TYLER

Eform Training

Office of Human Resources





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Eforms overview



What is an eform?

An eform is an electronic form to request a change in the HR/Payroll information database



How can I get to the HR database?



After an eform is fully completed,
the information is used to update
pages within the
HR Administration Tile

Job Data

All admins have access to view Job Data. This will tell you if your employee is currently active, terminated, or had a prior assignment with your department. Eform results are posted in job data.

Review eform results

Work Location Tab

- Name & Empl ID
- Hire/Rehire
- HR Status
- Position Number & Title
- Expected Job end date

The screenshot displays the 'Work Location' tab for an employee named Jane Doe. The interface includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The employee's name and Empl ID (123456789) are shown at the top. Below this, the 'Work Location Details' section contains various fields: Effective Date (02/14/2024), Effective Sequence (0), HR Status (Active), Payroll Status (Active), and Action (Rehire). The Position Number (10036986) and Title (Undergrad Assistant) are also visible. The 'Position Management Record' section lists details such as Regulatory Region (USA), Company (University of Texas, Tyler), Business Unit (UTT15), Department (College of Engineering), and Location (RBS). The 'Expected Job End Date' is set to 05/31/2024, and the 'End Job Automatically' checkbox is checked. The Date Created is 02/14/2024.

Field	Value
Name & Empl ID	Jane Doe, Employee Empl ID 123456789
Effective Date	02/14/2024
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Action	Rehire
Reason	Rehire - Same Institution
*Job Indicator	Primary Job
Position Number & Title	10036986 Undergrad Assistant
Position Entry Date	02/14/2024
Regulatory Region	USA
Company	University of Texas, Tyler
Business Unit	UTT15
Department	College of Engineering
Department Entry Date	02/14/2024
Location	RBS
Establishment ID	TYL
Last Start Date	02/14/2024
Expected Job End Date	05/31/2024
End Job Automatically	Checked
Date Created	02/14/2024

Job Data

All admins have access to view Job Data. This will tell you if your employee is currently active, terminated, or had a prior assignment with your department. Eform results are posted in job data.

Review eform results

Job Information Tab

- Reports To
- Standard Hours

Work Location **Job Information** Job Labor Payroll Salary Plan Compensation

Jane Doe Employee Empl ID 123456789 Empl Record 0

Job Information Details

Effective Date 02/14/2024 Go To Row

Effective Sequence 0 Action Rehire
HR Status Active Reason Rehire - Same Institution
Payroll Status Active Job Indicator Primary Job History

Job Code 10065 Undergrad Assistant
Entry Date 02/14/2024

Supervisor Level
Reports To 1122333 Administrative Asst II 5001236 John Smith

Regular/Temporary Regular Full/Part Part-Time
Empl Class Student Officer Code Not Applicable
Regular Shift Not Applicable Shift Rate
Classified Ind Classified Shift Factor

Standard Hours

Standard Hours 19.50 Work Period W Weekly
FTE 0.487500
 Add to FTE Actual Count? Encumbrance Override



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Types of eforms



Eform Types

- New Position Request
- Create Person of Interest (POI)
- Appointment
- Transfer

- Job Attribute Change
- Position Attribute Change
- Contract Additions and Changes

- Termination

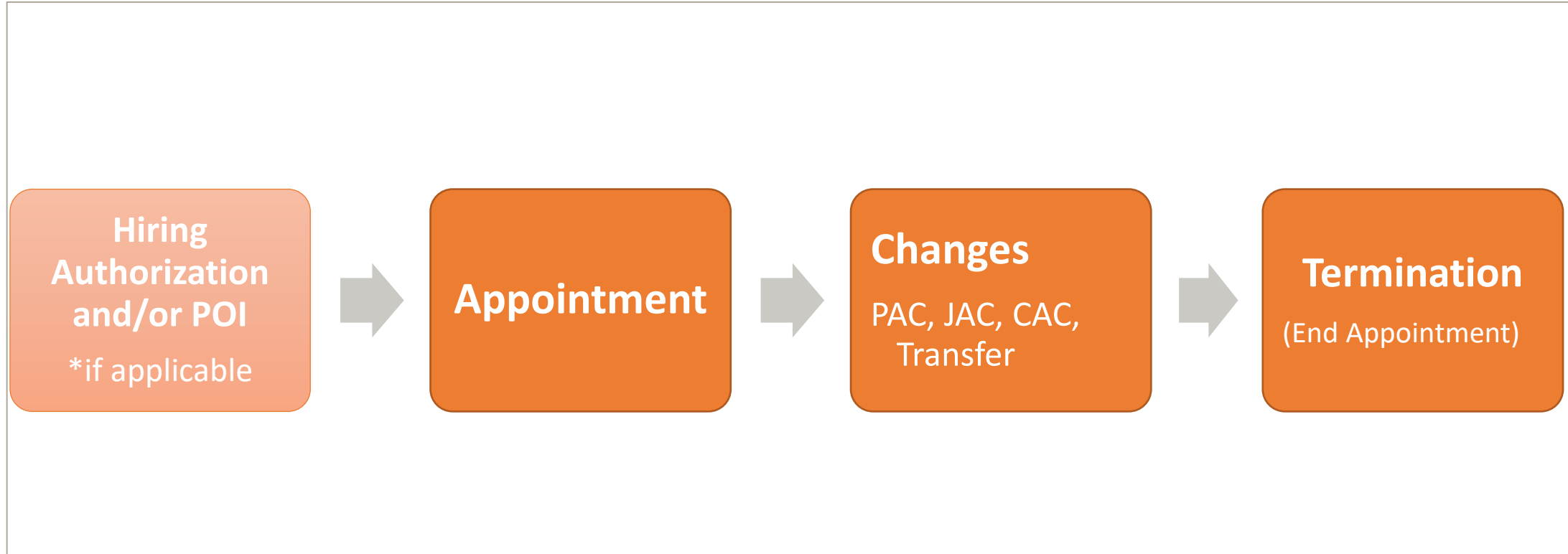
- Additional Pay
- Funding Change

Action	
Actions	<input type="text"/>
Justification	<input type="text"/>
▼ Contact Information	<input type="text"/>
Entered By	<input type="text"/>
Name	<input type="text"/>
Phone	<input type="text"/>

▼

- Additional Pay
- Appointment
- Contract Additions and Changes
- Create Person of Interest
- Funding Change
- Job Attribute Change
- New Position Request
- Position Attribute Change
- Termination
- Transfer

Eform Progression



Person of Interest (POI)

POIs provide email and/or Canvas access

- POIs can be given to:
 - Faculty
 - Volunteers (case by case basis)
 - Contractors (as needed)
- POIs are *not* connected to payroll
 - ❖ Not to be confused with a Financial Person of Interest

Job Code: A009
Title: Other Affiliated Affiliate

Create Person of Interest- POI

Action

Actions Status

*Justification

Empl ID

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

Proposed Personal Information

*First Name
Mid Name
*Last Name Suffix
*Address 1
Address 2
*City
*State
*Zip
*County
*Country USA United States

Job Information

*Hire Type
*Hire Reason
*Start Date
*Expected End
*Position
*Department

Appointments

An appointment is used to place an employee in a new position

- Appoints a new paid employee
- Appoints a returning employee with a break in service

****NOTE:** Please contact HR if the employee has a termination date that matches the prospective hire date

Appointments: New Hires, Add'l Appts, Rehires, Ext Transfers

Action

Actions: Appointment Status

Request ID
Request Date
Processing Messages
Request History

Justification

Employee Information

Empl ID Search Show Current Additional Pay

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

Employment Information

*Hire Type *Hire Reason

*Start Date Expected End Date End Job Automatically

Transfer From State Agency

*Position Current and Future Incumbents

Posted Flag

Empl ID	Empl Rcd	Name	Position Entry Date
	0		

Posting ID

Proposed Job Information

Empl Class *Pay Group FICA Status Comp Frqncy

FTE Stnd Hrs/Wk

*Proposed Rate @ 100%
Proposed Rate @ FTE
Proposed Monthly @ FTE
*Proposed Hourly Rate
Academic Rate

Transfers

An employee is leaving a department and going to another department with NO break in service

Transfers should be submitted by the *receiving* department

Transfer Within Institution	
Action	
Actions	Transfer ▼ Status
*Justification	Mr. Doo will be taking over as a GTA and leaving his current UGA position with NO break in service

*Transfer Date	06/17/2022 📅	Current and Future Incumbents			
*Position	10110523 🔍	Empl ID	Empl Rcd	Name	Position Entry Date
Expected End	08/31/2022 📅 <input checked="" type="checkbox"/> End Job Automatically		0		
*Transfer Action	Transfer ▼				
*Transfer Action Reason	Transfer within Institution ▼				
Current Position Information		Proposed Position Information			
Position	10110523 Profile ID	Position	10110523		
Company	University of Texas, Tyler ▼	Status	Active ▼		
Business Unit	UTTYL UT Tyler	Company	University of Texas, Tyler ▼		
Department	101650 Social Sciences	Business Unit	UTTYL UT Tyler		
Job Code	10069 Graduate Teaching Assistant	Department	101650 🔍 Social Sciences		
Job Title	Graduate Teaching Assistant	Job Code	10069 Graduate Teaching Assistant		
Reg/Temp	Regular ▼	Job Title	Graduate Teaching Assistant		
Full/Part Time	Part-Time ▼	Reg/Temp	Regular ▼		
FLSA Status	Exempt ▼	Full/Part Time	Part-Time ▼		
Empl Class	Graduate Teaching As ▼	FLSA Status	Exempt ▼		
Sal Plan	UTTYL Student ▼	Empl Class	Graduate Teaching Ass ▼		
Proposed Salary	<input type="text"/>	Sal Plan	UTTYL Student ▼		
Budgeted Amt	<input type="text"/>	Budgeted Amt	<input type="text"/>		
Academic Rnk	<input type="text"/>	*FTE	0.480000		

Change eforms

Position Attribute Change (PAC):

- FTE (hours)
- Reports to
- Location
- Department ID
- Business unit
- Title change (FT only)
- Wage AND title change –
Reclassification (FT only –
Position Change Authorization
DocuSign required)

Job Attribute Change (JAC):

- Changes to pay rates (Non-
faculty/non-contract)
- Change in automatic end dates

Contract Additions and Changes:

- For faculty only
- Add new contract
- Update pay on existing contract
- **Needed each semester for Adjunct
faculty

New Position Request

Creates a position number

Once eform is Complete, the position number will populate on the eform

Things to note:

- Effective date = 1st day of an unpaid month
- Please review the job code before submitting
- Please use the approved title that matches the DocuSign (if applicable)
- Hiring Authorization Request DocuSign must be attached when applicable

Action	
Actions	New Position Request <input type="button" value="v"/> Status Pending Approvals
Justification	Need an undergraduate teaching assistant position created i
Position Eff Date	10/25/2023
Copy Position	<input type="text"/>
Proposed Position Information	
Position	<input type="text"/>



Action	
Actions	New Position Request <input type="button" value="v"/> Status Completed
Justification	Request for new Library Intern position Authorization form is attached.
Position Eff Date	10/11/2023
Copy Position	<input type="text"/>
Proposed Position Information	
Position	10117679

Termination eforms (End Appointments)

- Termination eforms are used to terminate an active employee's current position
- Termination eforms need to be fully approved prior to the employees last day
- *Resignation letters are required for all voluntary terminations

End Employee Assignment(s)

Action

Actions **Termination** Status

*Justification

Request ID
Request Date
Processing Messages
Request History

Employee Information

*Empl ID

*Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason	Dept ID
1 <input type="checkbox"/>	0								

Termination Information

Transfer to State Agency

W2 Forwarding Information

Change Address

Address 1 Clean Address

Address 2

City

Termination eforms

(End Appointments)

Create as soon as notified of employee resignation/termination or approx. 1 month before their expected termination date

If notified late, please send HR and Payroll an email as soon as possible, notifying of employee name and termination date, to ensure last payroll calculates correctly

Funding change eforms

- A funding change eform updates the funding sources (cost center) for the position
- Instead of using the Empl ID, you will start a Funding Change eform by using the employee's Position number

*Show As Of	<input type="text" value="09/01/2023"/>
*Position	<input type="text"/>

- **Funding changes do not route to HR
- Please contact Budget for Funding Change questions budget@uttyler.edu

Department Approval

REQUEST_ID=00462850:Approved [View/Hide Comments](#)

Department Approval

Approved

John Doe
FMS Dept Approvers
03/20/24 - 2:45 PM

Skipped

FMS Dept Approvers
03/20/24 - 9:16 AM

Comments

Business Office Approval

REQUEST_ID=00462850:Approved

Funding Changes

Approved

Jane Doe
03/20/24 - 2:46 PM

Additional Pay eforms

An Additional Pay eform is used to pay current full time exempt employees a payment for temporary duties performed

****Prior approval will be required**

Employee Information

*Empl ID St

Select	Empl RCD	Job Indicator	Company	HR Status	Payroll Status	Eff Date	Action	Reason
1 <input checked="" type="checkbox"/>		0 Primary	TYL	Active	Active	09/01/2023	Pay Rate Change	Merit

Current Additional Pay

Empl Record

Earnings Code

Pay Start Date

Pay End Date

Monthly Amt

Goal Amt

Goal Bal

OK to Pay

Prorate Additional Pay

Proposed Additional Pay

Pay Action

*Earnings Code

*Pay Start Date

*Pay End Date

*Monthly Amt

*Total Pay

Goal Bal

OK to Pay

A note from Budget

Additional Pay eforms

If duties are different (e.g. classified/A&P doing faculty duties OR faculty doing A&P duties) that *would* be a 2nd appointment and additional pay on the new position

Example:
Empl 0 = Professor Position

Empl 1 = Chair Position
(zero fte, add'l pay)

Select	Empl RCD	Job Indicator	Company	Position Title
1 <input type="checkbox"/>		0 Primary	TYL	Professor
2 <input checked="" type="checkbox"/>		1 Secondary	TYL	Chair

A note from Payroll

Additional Pay Eform Dates and Earnings Codes

Incorrect Additional Pay Eform:

- Should not use the same earnings code within the same month
- Peoplesoft will not finish paying out first additional pay correctly
- The “New Payment” will override prior payment

The screenshot displays two instances of the 'Proposed Additional Pay' form. The top form shows a 'New Payment' for earnings code 'TMP' (Temporary Add'l Duties - (18)) with a start date of 09/01/2022 and an end date of 01/15/2023. The bottom form shows a 'New Payment' for the same earnings code 'TMP' with a start date of 01/16/2023 and an end date of 05/31/2023. Both forms show a monthly amount of 1500.00 and a total pay of 7500.00. The 'OK to Pay' checkbox is unchecked in both.

Field	Value
Pay Action	New Payment
*Earnings Code	TMP Temporary Add'l Duties - (18)
*Pay Start Date	09/01/2022
*Pay End Date	01/15/2023
*Monthly Amt	1500.00
*Total Pay	7500.00
Goal Bal	

Field	Value
Pay Action	New Payment
Earnings Code	TMP Temporary Add'l Duties - (18)
Pay Start Date	01/16/2023
Pay End Date	05/31/2023
Monthly Amt	1500.00
Total Pay	7500.00
Goal Bal	

A note from Payroll

Additional Pay Eform Dates and Earnings Codes

Correct Additional Pay Eform

- Use two separate earning codes if two payments are within the same month
- Peoplesoft will create two separate additional pay screens, and each payment will process in full

Proposed Additional Pay

Pay Action: New Payment

*Earnings Code: **TMP** Temporary Add'l Duties - (18)

*Pay Start Date: 09/01/2022

*Pay End Date: 01/15/2023

*Monthly Amt: 1500.00

*Total Pay: 7500.00 OK to Pay

Goal Bal:

Proposed Additional Pay

Pay Action: New Payment

Earnings Code: **SUP** Supplement Permanent - (18)

Pay Start Date: 01/18/2023

Pay End Date: 05/31/2023

Monthly Amt: 1500.00

Total Pay: 7500.00 OK to Pay

Goal Bal:

Important details for every eform

- **Justification** – This is your opportunity to communicate with us! The more details, the better.

Appointments: New Hires, Add'l Appts, Rehires, Ext Transfers

Action

Actions Appointment Status

Justification Cruella used to work for UT and took a semester off. This is a new appointment due to her break in service

Request ID
Request Date
Processing Messages
Request History

- **Position** – Employees cannot share position numbers.

Employment Information

*Hire Type Rehire *Hire Reason Same Institution

*Start Date 06/20/2022 Expected End Date 08/31/2022 End Job Automatically

Transfer From State Agency

Position 10110525

Posting ID

Current and Future Incumbents

Empl ID	Empl Rcd	Name	Position Entry Date
	0		

Important details for every eform

- **Timing of eForm approvals** - eForms for the same position should not be routing at the same time because the changes on one eForm most likely will affect the other

Example:

eForm 1: PAC to update reports to, effective 2/1

eForm 2: PAC to update FTE/hours, effective 2/1

Important

- **Comment section** – This section is used to communicate with others
- **Attachments** – Use this feature if you need additional documentation attached

▼ Attachments

Type	Note	Attached File	Attach Date/Time	By	View
1 Miscellaneous	Resignation	Tony.docx	06/20/22 4:07PM		

Add/Delete

► Comments

► Contact Information

Save Submit Approve Deny CallBack Sendback Cancel Copy...

What happens after I click submit?

Reports To Approvals

REQUEST_ID=00433345:Approved

Reports To Manager

Approved
Edward Farina
New Position Reports To
10/11/23 - 1:38 PM

Department Approval

REQUEST_ID=00433345:Pending

Department Approval

Pending
Multiple Approvers
FMS Dept Approvers

Business Office Approval

REQUEST_ID=00433345:Awaiting Further Approvals

Appointments

Not Routed → Not Routed
Multiple Approvers Budget Office → Multiple Approvers Human Resources

Approvals – Eforms route through several departments for approval

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

What happens after I click submit?

Eform Status

Action	
Actions	Create Person of Interest <input type="button" value="v"/>
Status	Completed

- **Pending Approvals** = still in routing.
- **Approved** = final approved and ready
- **Completed/completed manually** = this has been processed and is in Job Data.
- **Error on update** = The eform failed processing and must be entered into Job Data manually



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Additional Information



Compensation DocuSigns

Required for:

- A&P and Classified Staff positions
 - budgeted, temporary/casual, full-time or part-time
- Faculty positions (full-time)

Not required for:

- Part-time faculty/instructional support
- Student titles

***Note:** Please attach the required DocuSign to the corresponding eform(s)

Hiring Authorization Request

- Create a new position
- Hire someone into a new position

HR Compensation Form

- Make changes to an existing position
 - Ex: extending the end date (non-student) increasing wages, updating/reclassifying title

Auto Term

Employment Information

*Hire Type *Hire Reason

*Start Date **Expected End Date** **End Job Automatically**

At the start of a new month, please be sure to review workers in your department that have an auto-end date for the current month.

If you wish to extend their end date, please submit a [Job Attribute Change eForm](#), and make sure that it gets to HR Approval no later than the date on the email to ensure they do not terminate on the Auto-Term.

Auto Term cont.

How to remove an auto-end date:

Submit:
Job Attribute Change eform

Effective date:
BEFORE the auto-end date

Example:
Expected End Date: 5/31/2024
JAC Effective Date: 05/30/2024
(or BEFORE)

Job Data View:

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Jillian Whitehead Empl ID 6001228745
Employee Empl Record 0

Work Location Details ⓘ 🔍 | ⏪ ⏩ 2 of 5 ⏪ ⏩ + -

*Effective Date 02/14/2024 📅 [Go To Row](#) + -

Effective Sequence 0 *Action Rehire ⌵

HR Status Active Reason Rehire - Same Institution ⌵

Payroll Status Active *Job Indicator Primary Job ⌵

Position Number 10036986 🔍 Undergrad Assistant History 📄

[Override Position Data](#)

Position Entry Date 02/14/2024
 Position Management Record

Regulatory Region USA United States

Company TYL University of Texas, Tyler

Business Unit UTT15 College of Engineering

Department 104100 College of Engineering

Department Entry Date 02/14/2024

Location RBS Ratliff Building South

Establishment ID TYL 🔍 UT Tyler Date Created 02/14/2024

Last Start Date 02/14/2024

Expected Job End Date 05/31/2024 📅 End Job Automatically

PT Employment

- New Hire/ Rehire Requirements email is sent to candidate once e-form reaches HR queue
- Please be sure that hiring managers and employees are aware that part-time employees CANNOT begin working until **they have been approved by HR.**
- Reports To is responsible to approve timesheets

PT Employment

Student Positions

- Must be currently enrolled to hold student title
- Cannot exceed 19.5 hours
- Exception: GTA/GRA Tuition Waiver
- Cannot be on both payrolls at once.
 - Example: GTA & Grad Assistant

Part Time Faculty

This includes Adjunct Faculty and Specialists

- Eligible for POIs when necessary
- Part time faculty are not eligible for Additional Pays or Stipends
- Part time faculty cannot be in student appointments
- Per SACS requirements, eform must have offer letter, CV, and transcripts attached

Part Time Non-Faculty

- These are Classified, non-student positions
- Not eligible for POI's, Additional Pays, or Stipends
- Need the associated DocuSign (except Field Supervisors) for hiring or making changes to the position attributes

Student Titles

Job Code	Title	General Description of Duties
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.
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.
10067	Graduate Assistant	Responsible for assisting faculty and other University personnel with complex clerical and/or administrative assignments. Duties may include grading.
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.

Job Code	Title	General Description of Duties
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.
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).
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,
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.
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).
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.



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Thank you!

The Office of Human Resources

eforms@uttyler.edu

<https://www.uttyler.edu/human-resources/>

