Position and Workforce Management
Agenda

Overview
Review Position and Job Data
eForms
Reports and Queries
Position & Workforce Management Overview
The HCM (Human Capital Management) module in UT Share is used to manage positions and employee data.

Positions are identified through a unique eight-digit Position ID.

An Incumbent is an individual who currently holds the position.
When an incumbent is hired (appointed) they inherit the attributes of the position.

When the incumbent leaves the position, the attributes are retained.
When a **UTA employee transfers** from one UTA position into a different UTA position, **it is important** that the sending department does not create an e-form to terminate the employee since it creates a situation where the employee is separated from UTA in UTShare.

**Receiving department should use the Transfer Within Institution eForm to transfer the employee from one position into another.**
Transfer Scenario:
Thelma works in the College of Education as a Coordinator III. She was recently hired by the College of Science as an Assistant Director. She gave two weeks notice to her current supervisor Suzie Sending. Her last day in the College of Education is 11/30. She starts her new job working for Raquel Receiving on 12/01.

Action to Take:
Raquel’s Administrative Assistant (new position) initiates an e-form with Action: Transfer Within Institution and Effective Date 12/01.
Types of positions at UTA:

- Classified
- Administrative and Professional
- Faculty
- Graduate Student
- Undergraduate Student
- Persons of Interest - Job Codes for POIs usually starts with an “A”. Listed below are examples:

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Description</th>
<th>Job Code</th>
<th>Description</th>
<th>Job Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A002</td>
<td>Adjunct/Clinical Affiliate</td>
<td>A004</td>
<td>Payroll Contractor</td>
<td>A007</td>
<td>Visiting Student</td>
</tr>
<tr>
<td>A003</td>
<td>Independent Contractor</td>
<td>A006</td>
<td>Visiting Researcher</td>
<td>A009</td>
<td>Other University Affiliate</td>
</tr>
</tbody>
</table>
Pooled Positions

A position created for an Undergraduate Student, Casual Employee, or Person of Interest can have multiple incumbents. This type of position is called a “Pooled Position”.

- **Student Assistant**
  - Position: 10012345
  - Headcount: 3
  - Empl ID: 1000333224
  - Empl ID: 1000111225
  - Empl ID: 1000333226

- **Job Code**: 10076
Pooled Positions

Incumbents in a Pooled Position must share the following attributes:

- Job code
- Pay Type
- Funding Source
- Hours per week
- Reports To
Recruiting Tools at UTA

**PeopleAdmin:** is used to recruit and hire staff, faculty and administrators.

**Handshake:** is a career center platform for on-campus (e.g. Tutors, Student Assistant, etc.) as well as off-campus job/internship postings.
Review Position & Job Data
**Review Position and Job Data**

**Job Data**

The Job Data page is used to view position information for an incumbent.

![Job Data Page Screenshot](image)

**NavBar > Menu > HRMS > Workforce Administration > Job Information > Job Data**
Review Position and Job Data

Job Summary

Displays job history for an incumbent.

Navigator > HRMS >
UTZ Customizations >
Human Resources > Job
Summary
Review Position and Job Data

Position Information
This page is used to track position related data.

Navbar > Menu > HRMS > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
Department Budget Table

These pages are used to view position funding information.

NavBar > Menu > HRMS > UTZ Customizations > Manager Self Service > Position Management Center > Department Budget Table USA
Class Activity

- View Job Data
- View Job Summary
- View Position Information
- View Department Budget Table (DBT)
Processing eForms
**eForm** is an electronic form used to process various human resources, payroll and position funding transactions. Listed below are the different types of eForms:

**New Appt Forms**
- Add New Assignment
- Add New Faculty Contract
- New Position Request

**Change Forms**
- Add Additional Pay
- Modify Position
- Pay Rate Change
- Position Funding Change
- Transfer Within Institution

**End Forms**
- Employee Retirement
- Employee Termination
- End Assignment

**LOA Forms**
- Leave of Absence Request
- Return Employee From Leave
Use the **Action Request** page to find an existing eForm or to create a new form.

The **Find an Existing Value** tab is used to view an existing saved or submitted eForm request.

The **Add a New Value** tab is used to create a new eForm request.

Click the Actions drop-down menu and select the appropriate request form to get started.
Workflow is an electronic routing and approval process.

It enables transactions that are initiated by the eForm Requester, to route through the system to pre-defined Approvers.

Approvers are responsible for reviewing and verifying the information in the form for accuracy.
eForms Workflow

Workflow Approvers for eForms:

Department Approver

“Reports To” Manager listed on the position

Funding Approver

Approval is required from the Cost Center and/or Project (Grant) budgetary authority

Business Office Approver

Depending on the eForm, approval is required from Budgets, Provost, Grants & Contracts, Human Resources, and/or Payroll
It is highly recommended that at least two or more individuals are designated at funding approval to avoid delays in routing.

If an individual is assigned to two different approval levels (e.g. “Reports To” Manager and Funding Approver), the document will auto approve at the next stage.

eForm Requester should not process an eForm if listed as the “Reports To” Manager on a position.
Documents with multiple funding sources will route simultaneously for funding approval.

Each budgetary authority must approve the form before it will move to the next stage.

If one portion of funding is denied, the entire document will be returned to the Requester.
Workflow Notifications

Requesters will receive an email notification when the form has been Sent Back (Returned), Denied (Canceled) or Approved. Approvers will receive an email notification when an eForm has been submitted for approval.

The form can be accessed using one of the following options:

1: eForms pagelet
2: Action Request page
3: Email Message Link
   (not recommended)
Requesters Action Buttons:

- Save
- Submit
- Callback
- Cancel
- Copy
eForms Action Buttons

Approvers Action Buttons:

- Approve
- Deny
- Send Back
Check Funds Action button:

- This button is available to Requesters and Approvers.
- It’s used to check the availability of funds for the Cost Center/Project being used for the eForm expense.
eForms Action Buttons

Check Funds Action button:
After clicking the **Check Funds** button, the **Review Available Funds** page displays the current condition of your budget.

| Request ID | Account | Account Descr  | Budget  | Assoc Rev | Expenses | Encumbrance | Pre-Encumb | Available Bal | Requested Amt | Current Encumb | Additional Funds | Net Balance |
|------------|---------|----------------|---------|-----------|----------|-------------|------------|--------------|---------------|----------------|-----------------|---------------|-------------|
| 00051755  | A1000   | Staff Salaries | 53,194.00| 0.00      | -57,847.40| 20,387.83   | 0.00       | 25,841.23    | 2,737.93      | 3,422.42       | -584.49         | -24,356.74    |
| 51201     | SW Classified | 0.00       | 0.00    | 0.00      | 0.00     | 0.00        | 0.00       | 2,737.93    | 3,422.42       | -584.49         | 0.00            |
| A1200     | Wages   | 0.00         | 0.00    | -43,256.04| 21,060.00| 0.00        | 0.00       | -64,315.04  | 0.00          | 0.00           | 0.00           | -64,315.04    |
| A2000     | Faculty & TA Salaries | 1,829,660.00 | 0.00 | -1,229,433.45| 603,266.62| 0.00        | 0.00       | -3,039.47   | 17,415.46     | 0.00           | 17,415.46       | -20,454.93    |
| 00034218  | 50205   | SW Non Tenure Track | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 17,415.46 | 0.00 | 17,415.46 | 0.00 |
| A2100     | GTA Salaries | 66,880.00 | 0.00 | -4,741.04 | 2,340.00 | 0.00 | 0.00 | 59,798.96 | 0.00 | 0.00 | 0.00 | 59,798.96 |
| A3000     | Payroll Related Costs | 264,245.97 | 0.00 | -264,106.79 | 139.18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| A7000     | Expense Transfers | 59,248.00 | 0.00 | 59,248.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** |         |               | 2,273,227.97 | 0.00 | -1,066,932.72 | 697,193.03 | 0.00 | -32,397.78 | 20,163.39 | 0.00 | 167,305.97 | 49,320.15 |

**Blue** = the current eForm request

**Pink** = other pending eForm requests

**Yellow** = the budgetary account line is overdrawn (e.g. A1200)

**Red** = overall budget is overdrawn
Check Funds Action button:

The **Requested Amount** column displays the estimated expense for the current request and any other pending requests on the same funding source. Currently, the **Check Funds** button is not a hard stop for the eForm request.
Search Match

Search Match should always be performed when assigning a new or an existing employee.

<table>
<thead>
<tr>
<th>Source ID</th>
<th>Company</th>
<th>Empl ID</th>
<th>Universal ID</th>
<th>Type of Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>BirthDate</th>
<th>National ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>74 Arlington</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>John</td>
<td></td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 Arlington</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>John</td>
<td></td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
<tr>
<td>76 Arlington</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>John</td>
<td></td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
<tr>
<td>77 Arlington</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>John</td>
<td></td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
<tr>
<td>78 Arlington</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>John</td>
<td></td>
<td>Smith</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Address Validation

The Clean Address feature is used to correct and standardize addresses.

To ensure accuracy, you should run this process when entering addresses on the eForm.
# New Appointment Forms

The New Appointment Forms include:

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Assignment</td>
<td>Use to assign an incumbent into a position (e.g. new hires and rehires).</td>
</tr>
<tr>
<td>Add New Faculty Contract</td>
<td>Use to create a new contract, or update an existing contract. Contracts are used to pay Faculty salary, or contracted amount, within a specified date range. This form will be used to reassign non-tenured Faculty. Once the contracted amount has been paid, payroll is stopped; but the employee remains “Active”.</td>
</tr>
<tr>
<td>New Position Request</td>
<td>Use to create a brand new position for your department.</td>
</tr>
</tbody>
</table>

**NOTE:** Add New Assignment should NOT be used for employee transfers.
Class Activity

- Add New Assignment
Example Workflow

eForms New Assignment Workflow

**Requester**
- eForm Submitted

**Department**
- "Reports To" Manager

**Funding**
- Grant Funded?
  - Yes: Project Manager/Principal Investigator
  - No: CC Budget Authority

**Business Office**
- Faculty?
  - Yes: Provost
  - No: Human Resources

- Budget Office
  - Complete
# Change Forms

**The Change Forms include:**

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify Position</td>
<td>Use to change the attributes on a vacant or filled position (i.e. Reports To Change, Reorganization, Reclassification, Inactivate/Activate a Position, Transfer a Position, etc.)</td>
</tr>
<tr>
<td>Add Additional Pay</td>
<td>Use to request payment outside of an employee’s base salary (e.g. supplement, Awards, Special Assignment, etc.).</td>
</tr>
<tr>
<td>Pay Rate Change</td>
<td>Use to request an approved salary adjustment for an employee (e.g. equity, promotion, etc.).</td>
</tr>
<tr>
<td>Position Funding Change</td>
<td>Use to update position funding and/or the allocation of funding.</td>
</tr>
<tr>
<td>Transfer Within Institution</td>
<td>Use to transfer an employee from one position to another within the same department or institution.</td>
</tr>
</tbody>
</table>

**NOTE:** Transfer Within Institution **SHOULD** be used for all employee transfers.
Class Activity

- Modify Position
End Forms

The End Forms include:

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Assignment</td>
<td>Use to end a single or multiple assignments for an employee (i.e. student, non-tenured faculty, etc.).</td>
</tr>
<tr>
<td>Employee Retirement</td>
<td>Use for employee’s retiring from the University. If the employee has multiple positions, this form will retire all job records for the employee.</td>
</tr>
<tr>
<td>Employee Termination</td>
<td>Use to end an employee’s employment with the University. This form will terminate all existing job records for the employee.</td>
</tr>
</tbody>
</table>

NOTE: End forms should NOT be used for employee transfers.
Class Activity
• Employee Termination
The Leave of Absence Forms include:

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave of Absence Request</td>
<td>Use to place an employee on paid or unpaid leave (e.g. Academic Development Leave, Administrative Leave, Emergency Leave).</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This form should not be used for FMLA or Sick Leave Pool.</td>
</tr>
<tr>
<td>Return Employee from Leave</td>
<td>Use to return an employee form a paid or unpaid leave of absence.</td>
</tr>
</tbody>
</table>
Resources
# Available Reports and Queries

<table>
<thead>
<tr>
<th>Report /Query Name</th>
<th>Description</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTA_CA_PERMANENT_BUDGETED_POS</td>
<td>Permanent Budgeted Positions</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_FILLED_WORKSTUDY</td>
<td>Filled position list</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_PERMANENT_BUDGETED_POS</td>
<td>Permanent Budgeted Positions</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_PERM_BDGTD_POS_BY_DEPT</td>
<td>Permanent Budgeted Positions</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_UNFUNDED_POSITIONS</td>
<td>Positions Not Funded</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_JOB_DATA</td>
<td>Job Data by Department</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_POS_PROFILE</td>
<td>Position Profile by Department</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_VACANT_POSN</td>
<td>Vacant or LOA position list</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_MONTHLY_ACCRLS</td>
<td>SICK/VAC</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_POS_RPTS_TO</td>
<td>Reports To Information</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_VACANT_POSN</td>
<td>Vacant or LOA position list</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_HA_VAC_SICK_LEAVE_BAL_DEPT</td>
<td>Vac/Sick Leave By Dept</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_CA_POSITIONS_FUNDED_DBT</td>
<td>Positions Funded incl. vacant</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_CA_POSITIONS_FUNDED_FILLED</td>
<td>Funded &amp; filled; no vacant</td>
<td>NavBar &gt; Menu &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>PAYROLL ANALYSIS REPORT</td>
<td>Provides salary and benefit information for all</td>
<td>Navigator &gt; Financials &gt; Reporting Tools &gt; BI Publisher &gt; Query Report</td>
</tr>
<tr>
<td></td>
<td>employees associated with a specific department.</td>
<td>Scheduler</td>
</tr>
<tr>
<td></td>
<td>It contains information such as, the funding</td>
<td></td>
</tr>
<tr>
<td></td>
<td>source, Longevity Pay, Premium Sharing, etc.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You must have the appropriate security role to view queries/reports in UT Share. Your security role determines the results.
Procedures

For more information on Position Management and Workforce Management refer to the following at https://policy.uta.edu/

- Procedure HR-E-PR2: Classification and Allocation of Positions
- Procedure HR-E-PR3: Salary Administration – Classified Service
- Procedure HR-E-PR10: Employee Separation and Clearance Process
- Procedures BF-P-PR7: Accrued Vacation, Sick Leave, Death Benefits, Excessive Absences and Mid-Month Terminations
Resource Information

Support & Help:

– Knowledge Services: 817-272-2155
– Human Resources: 817-272-5554
– ServiceNow Self-Service

Training Resources:

– https://www.uta.edu/business-affairs/training/
  • Register for Classes
  • Join Business Affairs Listserv
  • View and/or Print Training Materials
    – PowerPoint
    – Training Guide
    – Job Aids