Position and Workforce Management
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Position and Workforce Management Overview

UT Share is used by departments at UTA to view incumbent, position, and funding source information. The Human Capital Management (HCM) module in UT Share allows management of positions and employee data. eForms is an electronic form solution that allows users to create forms in UT Share that supports capturing data, updating data, workflow approvals, auditing, and reporting.

Empl ID
A unique 10-digit number, i.e. 1000123456, assigned to individuals with an affiliation with UTA. It is used in the place of the SSN to identify an individual.

Job Code
A code used to identify a job role at the university, i.e. 10076 = Student.

Position Types at UTA
Classified, e.g. Accounting Clerk, Support Specialist, Administrative Assistant
Administrative and Professional, e.g. Accountant, Manager, Director, President
Faculty, e.g. Professors, Instructors, Lecturers
Graduate Student, e.g. Teaching Assistant, Research Assistant
Undergraduate Student, e.g. Student Assistant, Student Associates, Tutors

Persons of Interest (POI): This is an individual doing work for the University who is not considered a traditional employee. A POI may include visiting researchers, visiting students, volunteers, perspective employees, independent contractors. Job Codes for POIs usually start with an “A”.

Position
A position is a collection of tasks, duties, and responsibilities performed by an employee. It contains the attributes for a specific job such as Department, Job Code, Job Title, Purpose and Function, Qualifications, and Hours per Week. When a Position is created, a Position ID number is generated. It is a unique eight-digit number, i.e. 00012354, used to identify the position.

Assignment
An Assignment is the relationship between an incumbent and a position. It connects the incumbent to the position they hold.
**Funding Source**
This is the Chartfield values used to fund the position.

**Incumbent**
An Incumbent is an individual who currently holds the position.

When an incumbent is hired (assigned) to work in a position, the incumbent inherits the attributes of the position. When the incumbent leaves the position, the position stays on the organization chart, becomes vacant, and the information associated with the position is retained. Another incumbent can now fill the position.

EXCEPTION: Tenured Faculty Positions: When the incumbent leaves a tenured faculty position, the position should end. A new position must be created for a new tenured faculty member joining the university.

**Pooled Positions**
Most positions will have a Headcount of one. A position’s Headcount indicates the maximum number of incumbents that can be assigned to a position. A position created for an Undergraduate Student or Person of Interest can have multiple incumbents. This type of position is called a “Pooled Position”.

Incumbents in a Pooled Position must share the following attributes:

- Job code
- Pay Type (hourly, monthly)
- Paid from the same funding source (Cost Center or Project)
- Hours per week
- Appointed within the same assignment date range

Note: The incumbents in a Pooled Position can have different pay rates.

**Recruiting Tools at UTA**

**PeopleAdmin** is used to recruit and hire staff, faculty and administrators. Departments can create a job posting, run reports, review and manage applications. For more information, contact HR Employment Services at 272-3461.

**Handshake**: is a career center platform for on-campus (e.g. Tutors, Student Assistant, etc.) as well as off-campus job/internship postings. This tool is used to manage applicants. For more information, send an email to careers@uta.edu or call 817-272-2932.
Note: Human Resources will “Assign” incumbents into a Work-Study position. Departments are responsible for creating the position, changing the funding, and processing the separation for work-study students.

**Review Position and Job Data**

There are several pages in UT Share used to view Position and Job Data:

- Job Data
- Job Summary
- Position Information
- Department Budgeting Table (DBT)

**View Job Data**

The Job Data page is used to view position information such as work location (position number, physical location, department, assignment dates), job information (job code, Reports To, part-time/full-time status), and compensation (salary information, e.g. daily, weekly, monthly and annual pay rate).

1. Navigate to: Navigator > HRMS > Workforce Administration > Job Information > Job Data
2. The Current Job search page is displayed. This page provides several options for performing a search. The most common search method is by Empl ID or Name.
3. Enter the search parameter in the appropriate field and click the Search Button

The Job Data page is displayed. This page is divided into four tabs: **Work Location** (default tab), **Job Information**, **Job Labor**, and **Compensation**.
The **Work Location** page shows the overall job data. It shows the Effective Date of the current job record, the Position number, Position entry date, Company, Business Unit, Department, Location, etc.

This page also shows an employee’s start date, status, the effective date of the current record, and the actions/reasons that this record was entered.

Historical records can be accessed by including the history from the search page and then clicking through the arrows at the top of the job record.

This will allow a user to view all the actions on an employee’s position.

The **Job Information** page is used to view job code, job title, and Reports To information. Also, it provides part-time/full-time status, hours per week, and FTE (Full-Time Equivalent) information.

Note: The Job Labor page is not used at UT Arlington
The Compensation page is used to view the incumbent's salary information such as the compensation rate and compensation frequency (monthly, hourly, or contract).

The Pay Rates section displays an employee’s Daily, Weekly, Monthly, and Annual pay rate. To view the pay rates, click the expand arrow to open the section.

View Job Summary
The Job Summary page displays job history for an incumbent. This page provides historical data such as job code, position number, Reports To, salary information, e.g. daily, weekly, monthly, and annual pay rate, and funding information.

1. Begin by navigating to: Navigator > HRMS > UTA Customizations > Human Resources > Job Summary
2. The Job Summary search page is displayed. This page provides several options for performing a search. The most common search method is by Empl ID or Name.
3. Enter the search parameter in the appropriate field and click the Search button.
The Job Summary page is divided into seven tabs: General (default tab), Job Information, Work Location, Salary Plan, Compensation, Distribution, and Contract. This page displays historical data for an incumbent such as job history, salary, and funding source information.

The Job Information tab provides the employee’s job code history, the effective date for the job, part-time/full-time status, and standard work hours.
The **Salary Plan** tab provides the employee’s salary plan history, grade, and frequency.

![Salary Plan Example](image)

The **Compensation** tab provides the employee’s compensation rate history such as annual, monthly, daily, and hourly rate of pay.

![Compensation Example](image)

The **Distribution** tab displays the history of funding distribution for the employee. This information includes the cost center/project used to fund the employee’s position, position number, and the percentage of the funding distribution.

![Distribution Example](image)
If the employee is contract pay, i.e. faculty, the **Contract** tab displays the contract number and the start and end dates of the contract.

![Job Summary](image)

**View Position Information**

The **Position Information** page is used to track position related data. This page contains information such as Reports To, owning department, part-time/full-time status, assigned incumbent (if filled), position headcount, position classification, e.g. student, classified, faculty, A&P, etc.

1. Navigate to: **Navigator > HRMS > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info**.
2. The **Position Information** search page is displayed. This page provides several options for performing a search. The most common search method is by **Position Number, Department, or Job Code**.
3. Enter the search parameter in the appropriate field and click the **Search** button.
   
   **NOTE:** If you want to be able to view the position history, check the “Include History” box.
The **Position Information** page is divided into four tabs: **Description** (default tab), **Specific Information, Budget and Incumbents**, and **HR Data**.

The **Description** tab, is broken into four sections: Position Information, Job Information, Work Location, and Salary Plan Information. This section will display the overall attributes of the position itself including status, headcount, effective date, etc.

The **Position Information** section provides the position number, the current maximum headcount for the position, the actual head count, the effective date of the position, the status of the position, and the status date.

The **Job Information** section provides the job code, title, and the part-time/full-time status for the position.

The **Work Location** section provides the department associated with the position, the primary location, and the position number of the individual to whom the position reports.

The **Salary Plan** section provides the salary class and hours per week for the position.
The **Specific Information** tab displays the current and maximum head count for the position, the PO Box number, and work phone number where the position is located. Also, this page provides FTE (Full-Time Equivalent) information.

The FTE value is used to calculate the budget for the position e.g. 100%=1.0, 75%=.75, 50%=.50.

The **Budget and Incumbents** tab displays the incumbent(s) assigned to the position. In addition, it provides the Empl ID, record number, part-time/full-time status and hours per week for the incumbent(s).

The **HR Data** tab displays the employee class, current and past, of the incumbent. This information is based on the person not the position.
View Department Budget Table (DBT)
The Department Budget Table (DBT) is used to view position funding information. This page contains information such as funding source and allocation of funding, budget period begin and end dates, and incumbent(s) assigned to the position (if filled).

1. Begin by navigating to: Navigator > HRMS > UTZ Customizations > Manager Self Service > Position Management Center > Department Budget Table USA

2. The Department Budget Table search page provides several options for performing a search. The most common search method is by Department or Position Number.

3. Searching by Department displays all positions for the department. You will be required to select the appropriate position from a Search Results table.

4. Searching by Position Number displays information for a specific position in the department.

5. Enter the budget year (fiscal year) for the position, i.e. 2019.

6. Click the Search button.

NOTE: If you leave the fiscal year field blank and/or if the position existed in multiple budget years, you must select the appropriate row from a Search Results table.
The Department Budget Table page is divided into eight tabs. The various tabs are used by the Budget office to setup funding for positions.

NOTE: The “>” and “<” allow moving from page one to page two of the tabs.

Departments will use the Department Budget Earnings tab and/or the Budgetary Funding tab to obtain funding and position information.

- The Department Budget Earnings page is used to view the chartfield values to fund the position.
- The Budgetary Funding page is used to view the incumbent(s) assigned to the position (if filled).

The Department Budget Earnings page displays earnings information for the position.

- The top section of this page provides the department name and the fiscal year for the position budget. In addition, this section displays the beginning and ending dates for the budget period.
- The middle section provides the position number and the title associated with the position. Also, it displays the effective date of the budget row.
If changes have occurred to the position during the fiscal year, i.e. funding source changes, it may be necessary for you to click the View All link to view the historical data.

The Earnings Distribution grid consists of five tabs. Departments will use the Combination Code tab and/or the Combination Code Description tab to obtain information.

The Combination Code tab displays the Earnings Code type, the Combination Code, and the budget Distribution:

- The Earnings Code specifies the earning type. Examples include:
  - **CDA** = Cell Device Allowance
  - **TMP** = Temporary Supplement
  - **SUP** = Permanent Supplement
  - Note: If the field is blank, the earning type is **Salary**.
• The **Combination Codes** column identifies the funding source(s) for the budget.

• The **Distribution** column displays the percentage of funding allocated to each earning type and funding source. The distribution must equal 100%.

The **Combination Code Description** tab displays the funding source(s) for the position. The **ChartField Details** link displays the budget information.

The **Position Budgetary Funding** page allows you to see the current employee(s) assigned to the position. It will provide the employee ID, record number, part-time/full-time status, hours per week, and the name of the incumbent.

Note: If the position is vacant, this section will be blank.

**Processing eForms**

After reviewing position information, it may be necessary to create a new position or make changes to an existing position. This can be accomplished by processing the appropriate eForm in UT Share. eForm is an electronic form used to process various human resources, payroll and position funding transactions. Listed below are the different types of eForms:
Action Request
The Action Request page allows one to find an existing eForm or to create a new eForm.

Navigate to Navigator > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

Workflow
Workflow is an electronic routing and approval process used in eForms. 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 eform for accuracy.
The eForm Approvers are:

- **“Reports To” approver** – Manager listed on the position
- **Funding approver** – Depending on the funding source(s), 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 and Contracts, Human Resources, and/or Payroll.

It is highly recommended that at least two or more individuals are designated at each approval level to avoid delays in routing. **Exceptions:** “Reports To” Manager and Principal Investigator approvers.

If an individual is assigned to two different approval levels (e.g. “Reports To” Manager and Funding Approver), it is not necessary to approve the form twice. The document will auto approve at the next stage.

An eForm Requester should not create 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 eForm will be returned to the Requester.

**Requester Workflow**

Requesters will receive an email notification when the eForm has been sent back (returned), denied (canceled) or approved.

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

- Option 1: eForms Pagelet
- Option 2: Action Request page
- Option 3: Email Message Link (not recommended)
Option 1 – Using the eForms Pagelet

1. Log into UT Share.
2. Navigate to the “Workforce Administrator” homepage and click the “eForms” tile; then click “Create New Request.”

Option 2 – Using Action Request Menu

1. Navigate to Navigator > HRMS > UTZ Customizations > eForms HR/Payroll Actions > Action Request
2. Search by the Request ID number or any other field.
3. Enter the search parameter in the appropriate field and click the Search button.
Option 3 – Using the Email Message Link (not recommended)

1. Select the link provided in the email message. Note: Some users have experienced issues connecting to the workflow from using the email link.
2. If you are already logged in to UT Share, you will be directed to the eForm page. If not, you will be prompted to provide your login credentials, and then the eForm page is displayed.

Approvers Workflow

Approvers will receive an email notification when the eForm has been submitted for approval.

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

- Option 1: eForms Pagelet
- Option 2: Action Request page
- Option 3: Email Message Link (not recommended)

Option 1 – Using the eForms Pagelet

1. Log into UT Share.
2. Navigate to the “Workforce Administrator” homepage and click the “eForms” tile; then click “My Pending Approvals.”
Option 2 – Using Action Request Menu

1. Navigate to Navigator > HRMS > UTZ Customizations > eForms HR/Payroll Actions > My Pending Approvals
2. Select “Pending Approvals” from the Status field.
3. If necessary, enter your Empl ID in the “Assigned Operator ID” field and click Search.
4. Select the appropriate eForm from the Search Results table.

Note: If you have only one eForm to approve, it will open after clicking Search.

Option 3 – Using the Email Message Link (not recommended)

1. Select the link provided in the email message. Note: Some users have experienced issues connecting to the workflow form using the email link.
2. If you are already logged into UT Share, you will be directed to the eForm page. If not, you will be prompted to provide your login credentials, and then the eForm page is displayed.
Action Buttons

Requesters Action Buttons

- **Save**: Saves the information entered on the form.
- **Submit**: Submits the form into workflow.
- **Callback**: Recalls a form for revision or cancellation.
- **Cancel**: Cancels a form that is no longer needed.
- **Copy**: Creates a copy of an existing form

Approvers Action Buttons

- **Approve**: Approves and routes the form forward.
- **Deny**: Cancels the request completely; no further action can be taken. Comments are required explaining why the form was denied.
- **Send Back**: Returns eForm to the requester. Comments are required explaining why the form was returned.
Check Funds Action Button
The Check Funds button appears on any eForm that has the ability to add or update funding and is available to Requesters and Approvers. This button is used to check the availability of funds for the Cost Center/Project being used for the eForm expense.

![Image of eForm with Check Funds button highlighted]

The **Review Available Funds** page displays the current condition of your budget.

![Image of Review Available Funds table]

- **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

The **Requested Amount** column displays the estimated expense for the current request and any other pending requests on the same cost center or project.

Currently, the **Check Funds** button is not a hard stop for the eForm request. If the Cost Center or Project is overdrawn, the form will still move forward in Workflow.
Search Match
Search Match should always be performed when assigning a new or an existing employee. This feature searches multiple PeopleSoft environments to help identify Empl IDs and check for duplicate or multiple records for students and employees across UT Campuses, e.g. UT Arlington, UT El Paso, UT Permian Basin, UT San Antonio, UT Tyler, UT System.

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. If an exact address match is not found, a suggestion box appears to allow you to select from a list of possible addresses.
eForms

New Appointment Forms

<table>
<thead>
<tr>
<th>eForm Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Assignment</td>
<td>Assign an incumbent into a position, e.g. new hires and rehires.</td>
</tr>
<tr>
<td>Add New Faculty Contract</td>
<td>Create a new contract or update an existing contract. Contracts are used to pay Faculty salary or contracted amount within a specified date range. Once the contracted amount has been paid, payroll is stopped; but the employee remains “Active”.</td>
</tr>
<tr>
<td>New Position Request</td>
<td>Create a brand new position for the department.</td>
</tr>
</tbody>
</table>

New Appointment Forms Workflow

New Assignment
Add a New Faculty Contract

New Position Request Workflow
Change Forms

<table>
<thead>
<tr>
<th>eForm Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify Position</td>
<td>Change the attributes on a vacant or filled position, e.g. Reports To change, reorganization, reclassification, inactivate/activate a position, transfer a position etc.</td>
</tr>
<tr>
<td>Add Additional Pay</td>
<td>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>Request an approved salary adjustment for an employee, e.g. equity, promotion, etc.</td>
</tr>
<tr>
<td>Position Funding Change</td>
<td>Update position funding and/or the allocation of funding.</td>
</tr>
<tr>
<td>Transfer Within Institution</td>
<td>Transfer an employee from one position to another within the same department or institution.</td>
</tr>
</tbody>
</table>

Change Forms Workflow

Modify Position Workflow
Pay Rate Change Workflow

Additional Pay Workflow
Funding Change Workflow

Transfer Within Institution Workflow
## End Forms

<table>
<thead>
<tr>
<th>eForm Title</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Assignment</td>
<td>End a single or multiple assignments for an employee, e.g. student, non-tenured faculty, etc.</td>
</tr>
<tr>
<td>Employee Retirement</td>
<td>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>End an employee’s employment with the University. This eform will terminate all existing job records for the employee.</td>
</tr>
</tbody>
</table>

## End Forms Workflow

**Termination, End Assignment, and Retirement Workflow**

![Diagram of eForms Termination, End Assignment and Retirement Workflow]
LOA Forms

<table>
<thead>
<tr>
<th>Form Title</th>
<th>Purpose</th>
</tr>
</thead>
</table>
| Leave of Absence Request | Place an employee on paid or unpaid leave, e.g. Academic Development Leave, Administrative Leave, Emergency Leave.  
Note: This form should not be used for FMLA or Sick Leave Pool. |
| Return Employee from Leave | Return an employee from a paid or unpaid leave of absence.               |

LOA Forms Workflow

Leave of Absence Request & Return Employee from Leave Workflow
Reports and Queries

Query Viewer is used to view data, i.e. position information, in a report format. This page allows you to search for an existing query, download the results to Microsoft Excel, and/or print a query.

1. Begin by navigating to: Navigator > HRMS > Reporting Tools > Query > Query Viewer
2. The Query Viewer search page is displayed. The recommended search method is by Query Name or Description.
3. Enter the search parameter in the appropriate field.
4. Click Search.
5. The query is displayed in a Search Results table. To view the results of the query, click the appropriate link.
   • The HTML link is used to run a query and display the results in a new browser window.
   • The Excel link is used to download the result of the query to Microsoft Excel.
<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>Navigator &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>Navigator &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>Navigator &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>Navigator &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>Navigator &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>Navigator &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>Navigator &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>Navigator &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_MONTHLY_ACCRLS</td>
<td>SICK/VAC</td>
<td>Navigator &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>Navigator &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>Navigator &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 Department</td>
<td>Navigator &gt; HRMS &gt; Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_CA_POSITIONS_FUNDED_DBT</td>
<td>Positions Funded including Vacant</td>
<td>Navigator &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>Navigator &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 employees associated with a specific department. It contains information such as the funding source, longevity pay, premium sharing, etc.</td>
<td>Navigator &gt; Financials &gt; Reporting Tools &gt; BI Publisher &gt; Query Report Scheduler</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.
Resource Information
Policy & Procedures

Policies, Procedures and Official University forms are located at: https://www.uta.edu/policy

For more information on Position Management and Workforce Management refer to the following:

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