Position and Workforce Management

Presented by: Business Technology Services
Position & Workforce Management Overview
The HCM (Human Capital Management) module in UT Share is used by departments to manage positions and employee data.

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
- Hours Per Week

When a Position is created, a Position ID number is generated. It is a unique eight-digit number (e.g. 00012354) used to identify the position.

An Incumbent is an individual who currently holds the position.

The relationship between an incumbent and a position is called an Assignment. It connects the incumbent to the position they hold.
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 becomes vacant, and the information associated with the position is retained.

**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.
Types of positions 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 a traditional employee. POI may include visiting researchers, visiting students, volunteers, perspective employees, independent contractors. 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

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".
Position & Workforce Mgmt Overview

Pooled Positions
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
- Reports To

Note: The incumbents in a Pooled Position can have different pay rates.
Position & Workforce Mgmt Overview

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.

**SNAP (Student Needing a Position):** is used to recruit and hire work-study and non-work study students (e.g. Tutors, Student Assistant, etc.). This tool is used to manage applicants. For more information, send an email to snapjob@uta.edu or call 817-272-3463.

**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 & Job Data
Review Position and Job Data

There are several pages in UT Share used to view Position and Job Data: Listed below are the recommended pages:

**Job Data**
- Main Menu > Workforce Administration > Job Information > Job Data

**Job Summary**
- Main Menu > UTZ Customizations > Human Resources > Job Summary

**Position Information**
- Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

**Department Budgeting Table (DBT)**
- Main Menu > UTZ Customizations > Manager Self Service > Position Management Center > Department Budget Table USA
The **Job Data** page is used to view position information for an incumbent, such as:

**Work Location**
- Position Number
- Physical Location
- Department
- Assignment Dates

**Job information**
- Job Code
- Reports To
- Part-time/Full-time Status

**Compensation**
- Salary Information (e.g. Daily, Weekly, Monthly and Annual Pay Rate)
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)
- Funding Information
The **Position Information** page is used to track position related data. This page contains information such as:

- **Reports To**
- **Owning Department**
- **Full Time/Part Time Status**
- **Incumbent assigned to a position (if filled)**
- **Position Headcount**
- **Position Classification (e.g. Student, Classified, Faculty, A&P, etc.)**
Review Position and Job Data

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
- Incumbent(s) Assigned to the Position (if filled)
Job Data and Position Exercise

Class Activity
- View Job Data
- View Job Summary
- View Position Information
- View Department Budget Table (DBT)
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:

### 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.

Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request
eForms Workflow
Workflow is an electronic routing and approval process for 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 form for accuracy.
eForms Workflow

Workflow Approvers for eForms:

- **Department Approver**: “Reports To” 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 & Contracts, Human Resources, and/or Payroll
eForms Workflow

Workflow General Information

It is highly recommended that at least two or more individuals are designated at each approval level to avoid delays in routing.

Exceptions: “Report To” Manager and Principal Investigator Approvers.

If an individual is assigned to two different approval levels (e.g. “Report To” Manager and Funding Approver) it is not necessary to approve the form twice. 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.
eForms Workflow

Workflow General Information

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.
Requesters Workflow Notifications
Requesters will receive an email notification when the form has been Sent Back (Returned), Denied (Canceled) or Approved.

The form 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 in to UT Share.
2. From the eForms pagelet, located on the UT Share homepage, click “View Existing Requests” to search for the form. Or, click the “Request ID” number to view the specific form.

Note: If the eForms pagelet is not appearing on the homepage, click the “Content” link to add the pagelet.
Option 2 – Using the Action Request Page

1. Log in to UT Share.
2. Navigate to the Action Request page.
3. Perform a search by the Request ID number or any other field located on this page.

Navigation: Main Menu > HRMS > UTZ Customizations > eForms HR/Payroll Actions > Action Request
Option 3 – Using the Email Message Link

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 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 Notifications
Approvers Workflow Notifications

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

The eForm can be viewed 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 in to UT Share.
2. From the eForms pagelet, located on UT Share homepage, click “My Pending Approvals” to view all forms awaiting your approval. Or, click the “Request ID” to view the specific form.

Note: If the eForms pagelet is not appearing on the homepage, click the “Content” link to add the pagelet.
Option 2 - Using Action Request page

1. Log in to UT Share.
2. Navigate to the Action Request page.
3. Select “Pending Approvals” from the Status field.
4. If necessary, enter your Empl ID in the “Assigned Operator ID” and then click Search.
5. Select the eForm from the Search Results table.

Navigation: Main Menu > HRMS > UTZ Customizations > eForms HR/Payroll Actions > My Pending Approvals
Option 3 – Using the Email Message Link

1. Select the link provided in the email message.
   
   **Note:** Some users have experience issues connecting to the workflow form 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.
eForms Action Buttons
eForms Action Buttons

Requesters Action Buttons:

- **Save**: saves the information entered on the form.
- **Submit**: submits the form into workflow.
- **Callback**: used to recall a form for revision or cancellation.
- **Cancel**: use to cancel a form that is no longer needed.
- **Copy**: creates a copy of an existing form.
eForms Action Buttons

Approvers Action Buttons:

- **Approve:** use to approve and route 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:** the form is returned 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.
• 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.
Check Funds Action button:
After clicking the **Check Funds** button, the **Review Available Funds** page displays the current condition of your budget.

### eForms Action Buttons

- **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
eForms Action Buttons

Check Funds Action button:

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.
New Appointment Forms
# 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>
eForms Page Features
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 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.
Class Activity
- Add new Assignment
New Appt Forms Workflow
New Appt Forms Workflow

**eForms New Position Request Workflow**

**Requester**
- eForm Submitted

**Department**

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

**Business Office**
- Faculty?
  - No: Budget Office
  - Yes: Provost
  - Budget Office: HR Data Admin
  - HR Data Admin: Complete
Change Forms
## 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>
Class Activity

- Modify Position
Change Forms Workflow
Change Forms Workflow

eForms Additional Pay Workflow

<table>
<thead>
<tr>
<th>Requester</th>
</tr>
</thead>
<tbody>
<tr>
<td>eForm Submitted</td>
</tr>
</tbody>
</table>

| Department |
| "Reports To" Manager |
| Grant Funded? |
| Yes → Project Manager/Principal Investigator |
| No → CC Budget Authority |

| Funding |
| Grant Funded? |
| Yes → |
| No → |

| Business Office |
| Faculty? |
| Yes → Provost |
| No → HR Compensation |
| Payroll |
| Grant Funded? |
| Yes → Grants & Contracts |
| No → |

Complete
Change Forms Workflow

**eForms Pay Rate Changes Workflow**

**Requester**
- eForm Submitted

**Department**
- "Reports To" Manager

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

**Business Office**
- Faculty?
  - No → HR Data Admin → Complete
  - Yes → Provost
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>
eForms Exercise

Class Activity
- Employee Termination
End Forms Workflow
End Forms Workflow

eForms Termination, End Assignment and Retirement Workflow

**Requester**
- eForm Submitted

**Department**
- Reports To

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

**Business Office**
- Faculty?
  - Yes: Provost
  - No: HR Data Admin → Complete
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 from a paid or unpaid leave of absence.</td>
</tr>
</tbody>
</table>
LOA Forms
Workflow
# LOA Forms Workflow

## eForms Leave of Absence Request & Return from Leave Workflow

<table>
<thead>
<tr>
<th>Requester</th>
<th>eForm Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>&quot;Reports To&quot; Manager</td>
</tr>
<tr>
<td>Funding</td>
<td></td>
</tr>
<tr>
<td>Business Office</td>
<td>Leave Services</td>
</tr>
</tbody>
</table>
Reports and Queries
## 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>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_FILLED_WORKSTUDY</td>
<td>Filled position list</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_PERMANENT_BUDGETED_POS</td>
<td>Permanent Budgeted Positions</td>
<td>Main Menu &gt; HCM 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>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_CA_UNFUNDED_POSITIONS</td>
<td>Positions Not Funded</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_JOB_DATA</td>
<td>Job Data by Department</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_POS_PROFILE</td>
<td>Position Profile by Department</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_HR_VACANT_POSN</td>
<td>Vacant or LOA position list</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_MONTHLY_ACCRLS</td>
<td>SICK/VAC</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_POS_RPTS_TO</td>
<td>Reports To Information</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTA_VACANT_POSN</td>
<td>Vacant or LOA position list</td>
<td>Main Menu &gt; HCM 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>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_CAPOSITIONS_FUNDED_DBT</td>
<td>Positions Funded incl. vacant</td>
<td>Main Menu &gt; HCM Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>UTZ_CAPOSITIONS_FUNDED_FILLED</td>
<td>Funded &amp; filled; no vacant</td>
<td>Main Menu &gt; HCM 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>Main Menu &gt; FMS 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
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
Resource Information

Support & Help:

- Business Technology Services: 817-272-2155
- Human Resources: 817-272-5554
- ServiceNow Self-Service: https://uta.service-now.com/selfservice

Training Resources:

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