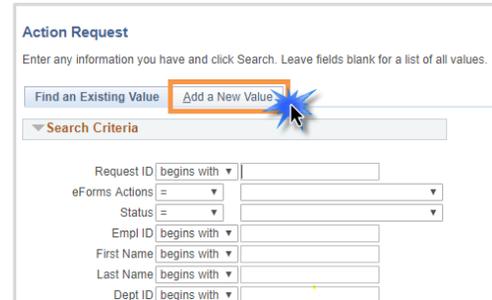


New Position Request

The New Position Request form is used to create a new position for your department. To process a new position request, complete the following steps:

- 1) In UT Share, navigate to the Action Request page.

 NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request
- 2) Click the Add a New Value tab.
- 3) The **Initiate New eForms Request** page is displayed. Select **New Position Request** from the **Actions** drop-down menu.



Action Request
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search Criteria

Request ID begins with

eForms Actions =

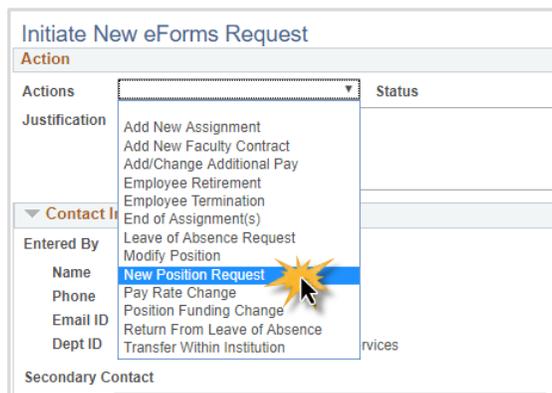
Status =

Empl ID begins with

First Name begins with

Last Name begins with

Dept ID begins with



Initiate New eForms Request

Action

Actions Status

Justification

▼ Contact Information

Entered By

Name **New Position Request**

Phone

Email ID

Dept ID

Secondary Contact

4) Complete the Action section

Enter the following fields:

- A. Justification
- B. Position Effective Date
- C. If desired, you may use the **Copy Position** field to enter or lookup an existing Position number to copy the details (position attributes) to your new request (i.e. Department, Job Code/Title, Standard Hours, FTE, etc.).



New Position Request: Create and Fund a New Position

Action

Actions New Position Request Status

Justification **A**

*Position Eff Date 05/02/2019 **B** Copy Position **C**

Request ID
Request Date
Processing Messages
Request History

- 5) The **Proposed Position Information** section is used to enter the key attributes for the position. If the **Copy Position** feature was used, tab to the appropriate fields and make the necessary changes. Otherwise, you must complete all the required fields in this section.

Enter the following position attributes:

- A. Department
- B. Job Code
Once the Job Code is entered, several position attributes will auto populate.
- C. Reports to Position
Once the Report to Pos is entered, the “Reports To Name” and “Reports To Email” will auto populate (if the Reports to position is filled).
- D. Location Code
- E. Mailbox Drop ID (campus P.O. Box number)
- F. Select the checkbox if this is a Budgeted Position.
- G. If necessary, update the Business Unit and Status.

Proposed Position Information

Position

*Status

Company 

*Business Unit

*Department 

*Job Code 

Job Title

Reg/Temp

Full/Part Time

FLSA Status

Empl Class

Proposed Salary

Acdmc Rnk

*FTE

*Std Hrs/Wk

*Max Head Cnt

*Reports To Pos 

Reports To Name

Reports To Email

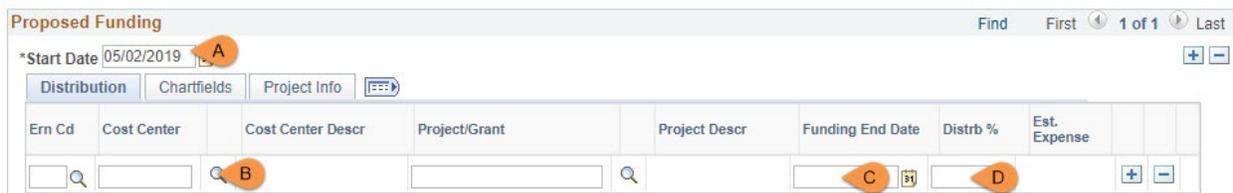
*Location Code 

Mail Drop ID 

Budgeted Position 

6) Use the **Proposed Funding** section to enter funding information for the new position.
Enter the following fields:

- A. Start Date
Enter the effective date for the Proposed Funding in the Start Date field.
- B. Cost Center, Cost Share or Project/Grant
Enter the Cost Center, Cost Share or Project/Grant funding the position, click the magnifying glass and confirm the account number.
- C. Funding End Date
The Funding End Date for Projects or Cost Shares should be the end of the assignment, the project or fiscal year; whichever date is first. If the funding source is a Cost Center, leave the Funding End Date field blank.
- D. Distribution percentage
Enter the funding Distribution %. Funding may be split between different Cost Centers, Cost Shares or Projects. The total distribution percentage must equal 100%. Use the plus [+] or minus sign [-] to add/remove an additional funding source.

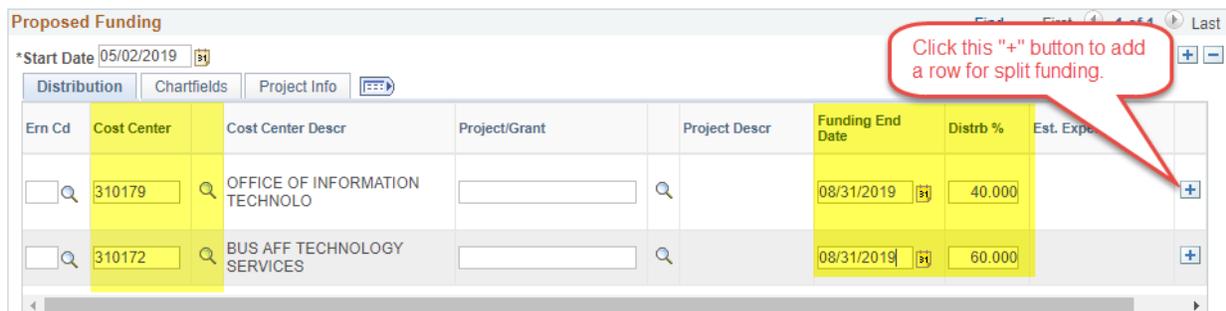


The screenshot shows the 'Proposed Funding' form with the following fields highlighted: Start Date (05/02/2019), Cost Center (310179), Funding End Date (08/31/2019), and Distribution % (40.000).

6a. Add a Distribution Row

To enter split funding for the same time period, click the plus sign [+] in the right column of the **distribution tab** to insert a new row.

Below is an example of a 60/40 funding split for two cost centers beginning on May 2, 2019.



The screenshot shows the 'Proposed Funding' form with two distribution rows. The first row is highlighted in yellow and has a red callout box pointing to the '+' button in the right column. The second row is also highlighted in yellow. The callout box contains the text: 'Click this \"+\" button to add a row for split funding.'

Ern Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Exp.
	310179	OFFICE OF INFORMATION TECHNOLO			08/31/2019	40.000	
	310172	BUS AFF TECHNOLOGY SERVICES			08/31/2019	60.000	

6b. Add a Funding Period

To enter funding with a different, **Start Date**, click the plus sign [+] in the upper-right corner of the **Proposed Funding** section to insert a new row.

Below is an example of Split funding over two funding periods (May/June & July/August).

Proposed Funding Find First 1-2 of 2 Last

*Start Date 05/07/2019 Use this "+" button to add a new funding period. + -

Distribution Chartfields Project Info

Err Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
					06/30/2019		

*Start Date 07/01/2019 + -

Distribution Chartfields Project Info

Err Cd	Cost Center	Cost Center Descr	Project/Grant	Project Descr	Funding End Date	Distrb %	Est. Expense
					08/31/2019		

7) Click Save and Review Available Funds

Once the required fields (indicated with an *asterisk) are completed, click **Save**. Once the form is saved, a **Request ID** number (e.g. 00002476) is assigned and the form status is displaying "Saved" at the top of the form.

Contact Information

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

The **Review Available Funds** page will automatically display once you have clicked save. This page is used to view the current condition of your Budget.

If the Cost Center, Cost Share or Project is overdrawn, take necessary actions to complete a budget transfer or revise the funding sources for the position on the eForm prior to submitting it. If the form is submitted with an overdrawn budget the budget office will not approve the form.

- The Requested Amount column displays the estimated expense for the current request and the estimated expenses for any other pending requests on the same cost center or project.
- Click **OK** to return to the main page of the form.

Review Available Funds
Cost Center 312345 Department Name

Request ID	Account	Account Descr	Budget	Assoc Rev	Expenses	Encumbrance	Pre-Encumb	Available Bal	Requested Amt	Current Encumb	Additional Funds	Net Balance
	A1000	Staff Salaries	1,279,745.00	0.00	-426,956.11	199,870.16	0.00	652,918.73	23,787.88	0.00	23,787.88	645,494.49
00000049	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000046	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	8,181.82	0.00	8,181.82	0.00
00000047	51201	SW Classified	0.00	0.00	0.00	0.00	0.00	0.00	7,424.24	0.00	7,424.24	0.00
	A1200	Wages	72,045.00	0.00	-84,292.05	0.00	0.00	-12,247.05	0.00	0.00	0.00	-12,247.05
	A2000	Faculty & TA Salaries	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	A3000	Payroll Related Costs	468,853.00	0.00	-149,175.75	0.00	0.00	319,677.25	0.00	0.00	0.00	319,677.25
	A4000	Operating Expenses	1,371,885.27	0.00	-240,505.21	2,212.00	0.00	1,129,168.06	0.00	0.00	0.00	1,129,168.06
	A7000	Expense Transfers	551,275.00	0.00	-551,275.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Totals		3,743,803.27	0.00	-1,452,204.12	202,082.16	0.00	2,089,516.99	23,787.88	0.00	23,787.88	2,065,729.11

OK Cancel

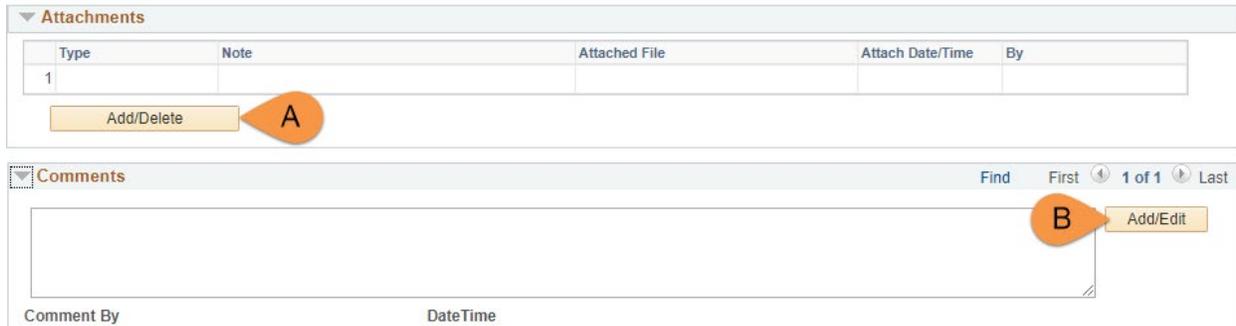
Row colors on the Review Available Funds Page indicate the following:

- 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

8) Add Attachments and Comments

- A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.
- B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

Note: Attachments and Comments cannot be added unless you have clicked Save.



Attachments

Type	Note	Attached File	Attach Date/Time	By
1				

Add/Delete **A**

Comments Find First 1 of 1 Last

Add/Edit **B**

Comment By DateTime

9) Complete the Form Procedures Section

The **Form Procedures** section is used as a checklist and to provide additional information about the request. Review and provide answers to the questions in this section.



Form Procedures

New Position Requisition & Review Form Attached?

Have you verified that the funding for this position is correct?

Date Approved by Hiring Committee 

Create/Recruit (Post Position)

Create Only (No Posting)

Replace Current/Recruit (Post Position)

10) Add a Secondary Contact (if needed) and Submit the Form to Workflow

- A. If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the New Position Request form.
- B. After completing the eForm, click the **Submit** button to send the document for approval. The eForm **Status** changes to “Pending Approvals” and the current routing is displayed.

Contact Information

Entered By

Name Candice Beckman
Phone 817/272-6942
Email ID beckmanc@uta.edu
Dept ID 320105 Business Technology Services

Secondary Contact **A**

Name
Phone

Save **Submit** **Deny** **CallBack** **Sendback** **B**