University of Houston ◢ Clear Lake
Planning and Budget

Electronic Personnel Request form (ePRFs), are submitted for personnel when there are changes in the position, cost center and/or FTE. The Budget analyst is an approver for ePRFs, after compensation approves.
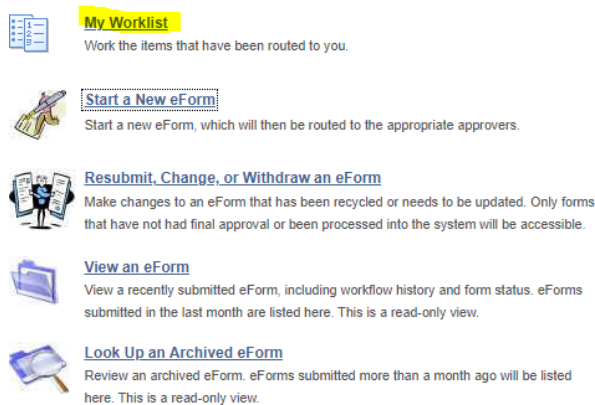
To access the ePRF worklist, log in to PeopleSoft HR
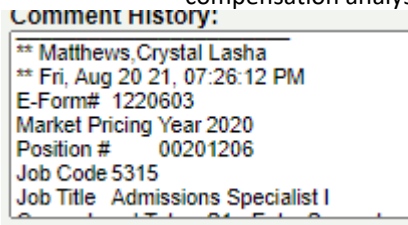1. Go to eForms Home Page

2. Then click My Worklist

This will produce the list of all ePRFs that are pending approval by the Budget Office. The budget analyst will approve or deny, all requests except for Strategic Hiring Committee request (SHC). SHC requests are to be approved by the Budget Director.

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Types of Requests

1. Strategic Hiring Committee (SHC) Requests: These ePRFs are new hires or reclassifications that must go through the Strategic Hiring Committee for approval.
   a. To differentiate between a regular ePRF and a SHC ePRF, you would look in the comment section of the ePRF.
      i. If there is a comment from compensation with the information from the compensation analysis for that position then this is a SHC request

   Comment History:
   ```
   ** Matthews,Crystal Lasha
   ** Fri, Aug 20 21, 07:26:12 PM
   E-Form# 1220603
   Market Pricing Year 2020
   Position #     00201206
   Job Code 5315
   Job Title  Admissions Specialist I
   ```

      ii. The attachment section can also show if it's a SHC request. For SHC requests, the initiator must upload certain documents that are not required on other ePRFS.

   Attachments

	View	Description	File size	Author	Created Date/Time	
1	View	Job/Position Description (if a		8014165	08/24/21 11:04:17AM	−
2	View	Dept Organizational Chart		1144133	01/06/21 4:01:37PM	−
3	View	Hiring Manager Approval Email		1144133	01/06/21 4:02:01PM	−
4	View	Strategic Hiring Worksheet		1144133	03/10/21 4:00:58PM	−

   b. If a SHC ePRF is on your worklist then leave it. The budget director will approve/deny it.

2. Grant ePRFs
   a. These requests are approved by OSP before reaching the Budget Office worklist in which we always approve.
   b. ePRFs can be identified as Grant ePRFs by looking at the New Budget information. If it is FUND 5XXX and has a grant combo code included in the Chartfield string.
      i. Sometimes the comment section will state that this is a grant-funded position.

New Budget Information

Speedtype(s)	Combination Code(s)	Distrb %(s)	Funding End Dt
00759-16734	5019-C0023-A0001-G200025	100.000	

3. All other ePRFs
   a. All ePRFs, excluding SHC and grant requests, should be reviewed to determine if the request is appropriate.

Reviewing the ePRF

1. The first area to review is the Actions & Reasons section. This will show if the request is a position change, budget change, or both.

Action(s) & Reason(s)

	Action	Reason
1	Position Change	Transfer
2	Budget Change	

   a. Position changes are typically when the reports to manager (RTM) is changed for that particular position or the FTE is adjusted.
      i. RTM changes can be approved
      ii. FTE changes for benefits-eligible positions should have justification before approval.

   b. Budget changes occur when the position is being moved to a new Cost Center (CC). The new CC will be displayed under New Budget Information on the ePRF. In order for these requests to be approved, it must have the following:
      i. A current 1074 must be attached to the ePRF
      ii. There must be funding available in the CC per the 1074- The overall CC must be positive not just the budget node.
      iii. If the position is being moved from a non-state or non-2064 CC to State or 2064 then there must be approval from the Budget Director attached in the documentation section.
      iv. Some positions are excluded from requiring a 1074. This includes student workers, graduate assistants, and adjuncts.

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     v.   If the ePRF does not have this information attached or there is no funding available then write a comment providing the issue and RECYCLE it back to the initiator

Comments

Your Comment:

Need to upload 1074

Comment History:

    Approve   Deny   Recycle

     vi.   If the ePRF provides the information and the CC has funding then the request can be approved.