HUMAN RESOURCES MANAGEMENT SYSTEM

PeopleSoft
Version 9.0
ePRF

UNIVERSITY OF HOUSTON-CLEAR LAKE
Training/ Reference Guide

Overview

The electronic Personnel Request Form (ePRF Form) allows the user to request to create a new position, update an existing position, or inactivate a position. By updating an existing position, the user can request to change the funding on a position or transfer the position to another department. The user can also request to change the classification/rank or standard hours/FTE on a benefits-eligible position.

eForms Home Page

Use the eForms Home Page to navigate to the "Start a New ePRF Form" Link

Favorites | Main Menu > Department Self Service > eForms Home Page

New Window | Help | Customize Page |

Electronic Forms (eForms) Home Page

My Worklist
Work the items that have been routed to you.

Start a New eForm
Start a new eForm, which will then be routed to the appropriate approvers.

Resubmit, Change, or Withdraw an eForm
Make changes to an eForm that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.

View an eForm
View a recently submitted eForm, including workflow history and form status. eForms submitted in the last month are listed here. This is a read-only view.

Look Up an Archived eForm
Review an archived eForm. eForms submitted more than a month ago will be listed here. This is a read-only view.

Navigation: **Department Self Service > eForms Home Page > Start a New eForm > Position Request (ePRF)**

To select the link

1. Click on "Start a New eForm"

Start a New eForm
Start a new eForm, which will then be routed to the appropriate approvers.

2. Click on the appropriate eForm to initiate

Start a New electronic Form (eForm)

Personnel Action Request (ePAR)
Use this form to submit a request to hire, edit existing job data, change employment status or add additional pay for an employee.
Personnel Action Request (ePAR)

Position Request (ePRF)
Use this form to submit a request to create a new position; reclassify an existing position; change department, FTE, or funding on a position; or inactivate a position.
Position Request (ePRF)

Person of Interest (ePOI)
Use this form to request a PeopleSoft ID for a non-employee, non-student. PS IDs are needed for access to many campus services, including parking, email and Cougar1Card.
Person of Interest (ePOI)

Reallocation/Suspense (eRAF)
Use this form to submit a request to reallocate funding on a payroll transaction.
Reallocation/Suspense (eRAF)

Return to Electronic Forms (eForms) Home Page

Create a New Position

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1. Check "Create a New Position."

The Add button will display. Click the Add button to request a new position.

Favorites | Main Menu > Department Self Service > eForms Home Page

New Window | Help | Customize Page | http

Add Position Request (PRF)

Position Search

Choose a checkbox below for the position action you wish to request: Create a New Position, Update an Existing Position or Inactivate an Existing Position.

To create a new position, click the appropriate checkbox and the Add button will display. Click Add to request a new position.

To update or inactivate an existing position, click the appropriate checkbox and a position search table will appear. If you know the position number, enter it, and click Search. Otherwise, enter the information you have and click Search.

Search Fields

☑ **Create a New Position**

☐ Update an Existing Position   Add Position

☐ Inactivate an Existing Position

2. Enter Effective Date and Department Information:

- Effective Date (Must be within current fiscal year or within fiscal year available for budget entry)
- Department #
- Location Code (Will default to Location Code associated with Department; can be overridden)
- Reports to Position (If applicable)

Add Position Request (PRF)

Step 1 of 3: Position Information

Complete the fields below with the appropriate position information that is being requested.

Position Information

Requested Action: Create a New Position		**eForm ID:** 202608
*Effective Date: 09/01/2011 📅		Position Data
Position Number: NEW		
Present Job Code/Title:		
Incumbent(s):		

Department Information

*Department: C0047 🔍   SOE Advising

Business Unit: HR759   UH Clear Lake

*Location Code: C601 🔍   Bayou Building

Reports To Position: 🔍

3. Enter Job Classification Information

Select:
- Reg/Temp – Reg (benefits-eligible), Temp (non-benefits-eligible)
- Empl Class-Faculty, Prof/Admin Staff, Support Staff.

If Reg Position, Select whether to:
- Use Existing Job Code – Enter Proposed Job Code
- Create New Job Code – Contact HRIS/Compensation Specialist at extension 2166.

If Temp Position, Enter Proposed Job Code

Enter Proposed Annual Salary (If applicable)

Job Classification Information

*Reg/Temp: Regular

*Empl Class: Prof/Admin Staff

◉ **Use Existing Job Code**   ○ **Update Existing Job Code**
○ **Create New Job Code**

Proposed:

*Job Code/Title: 3110 🔍 Academic Advisor   **Salary Plan:** MNT   **Salary Grade:** 030   **Annual Salary:** 35000.00

4. Enter Standard Hours/FTE

If Reg Position,
- Enter Standard Hours; FTE will populate based upon Standard Hours

If Temp Position
- Standard Hours will default to 1 and FTE will default to .03, since Standard Hours and FTE are entered on Job Data

Standard Hours/FTE

*Standard Hours: 40.00   **FTE:**   1.00

[<< Search] [Next >>]

5. Enter Budget Information

- Speedtype(s)
- Distrb %(s) (Must total 100%)
- Funding End Date (If Grant or Contract)

Add Position Request (PRF)

Step 2 of 3: Budget Information

Complete the fields below with the appropriate budget information that is being requested.

Position Information

Requested Action:	Create a New Position	**eForm ID:**	202610
Position Number:	NEW		
Proposed Job Code/Title:	3110	Academic Advisor	
Incumbent(s):			

Budget Information

*Speedtype(s)	Combination Code(s)	*Distrb %(s)	Funding End Date		
00759-11330 🔍	1051-C0047-A0230-NA	100.000	📅	➕	➖

Distribution % Total: 100.000

<< Previous   Next >>

6. Finalize Form

Add Position Request (PRF)

Step 3 of 3: Finalize Form

Enter any relevant information requested where indicated and/or comments in the "Your Comment" field to be included with this form.

Position Information

Requested Action: Create a New Position

Position Number: NEW

Proposed Job Code/Title: 3110   Academic Advisor

Incumbent(s):

Action(s) & Reason(s)

	Action	Reason
1	Position Change	New Position
2	Budget Change	

Attachments

Description [▼]   [Add New Document]

	View	Description	File size	Author	Created Date/Time	
1	View				09/23/11 11:29:06AM	[−]

Comments

Your Comment:

Create new Academic Advisor position for SOE

Comment History:

[<< Previous]   [Hold]   [Submit]

Note: If there is a Position Change, the form will route to the HR Department for approval. If there is a Budget Change, the form will route to the Budget Department and Office of Sponsored Programs, if applicable.

Note: Once the HR Department, Budget Department, and Office of Sponsored Programs approves the form and it is executed, the initiator will receive an email informing them that the form has been authorized. The form will be available for view with the new position # and approved job classification.

7. View Approved Form

Navigation: **Department Self Service > eForms Home Page > View an eForm > Position Request (ePRF)**

View Position Request (PRF)

Step 1 of 2: View Position Request

This page displays the data that was entered on the form and associated comments.

Position Information

Requested Action:	Create a New Position	Position Data
Position Number:	NEW	
Incumbent(s):		

New Position Information

Effective Date:	09/01/2011	**eForm ID:**	202610
Department:	C0047	SOE Advising	
Business Unit:	HR759	UH Clear Lake	
Location Code:	C601	Bayou Building	
Reports To Position:			
Reg/Temp:	Regular		

Empl Class: Prof/Admin Staff

⊙ **Use Existing Job Code**   ○ **Update Existing Job Code**
○ **Create New Job Code**

Proposed:

Job Code/Title: 3110 Academic Advisor   **Salary Plan:** MNT **Salary Grade:** 030 **Annual Salary:** $35,000.00

Approved:

Job Code/Title: **Salary Plan:**   **Salary Grade:**

Hiring Range From: **To:**

Standard Hours: 40.00   **FTE:** 1.00

New Budget Information

Budget Effective Date: 09/01/2011

Speedtype(s)	Combination Code(s)	Distrb %(s)	Funding End Dt
00759-11330	1051-C0047-A0230-NA	100.000	

Distribution % Total: 100.000

Action(s) & Reason(s)

	Action	Reason
1	Position Change	New Position
2	Budget Change	

Attachments

	View	Description	File size	Author	Created Date/Time
1	View				09/23/11 11:40:32AM

Comments

Comment History:

_____

** Fri, Sep 23 11, 11:39:10 AM
Create new Academic Advisor position for SOE

<< Previous   Next >>

Update an Existing Position

1. Check "Update an Existing Position."

   The Existing Position Search page will display. Enter the position # to be updated, or enter the information you have and click search.

Add Position Request (PRF)

Position Search

Choose a checkbox below for the position action you wish to request: Create a New Position, Update an Existing Position or Inactivate an Existing Position.

To create a new position, click the appropriate checkbox and the Add button will display. Click Add to request a new position.

To update or inactivate an existing position, click the appropriate checkbox and a position search table will appear. If you know the position number, enter it, and click Search. Otherwise, enter the information you have and click Search.

Search Fields

- ☐ Create a New Position
- ☑ Update an Existing Position
- ☐ Inactivate an Existing Position

Existing Position Search

Position Number:	00020143
Department:	C0046
Job Code:	
Job Title:	

[Search]   [Clear]   [Cancel]

2. Select position # from Position Result.

Position Result   Customize | Find | View All |

Position Number	Department	Job Code	Job Title
00020143	C0046	5016	Secretary

3. Enter Effective Date and Department Information:

- Effective Date (Must be within current fiscal year or within fiscal year available for budget entry)
- Department Information will populate from position data.
- Make requested changes as applicable to:
  -Department #
  -Location Code (Will default to Location Code associated with Department; can be overridden)

Add Position Request (PRF)

Step 1 of 3: Position Information

Complete the fields below with the appropriate position information that is being requested.

Position Information

Requested Action:	Update Existing Position	eForm ID: 202668
*Effective Date	10/1/2011	Position Data
Position Number:	00020143	
Present Job Code/Title:	5016 Secretary	
Incumbent(s):		

Department Information

*Department:	C0046		SOE Dean's Office
Business Unit:	HR759		UH Clear Lake
*Location Code:	C601		Bayou Building
Reports To Position:	00020151		Sr Business Coord

4. Enter Job Classification Information

If Reg Position, Select:
> Empl Class

Current Job Classification Information will populate from position data

Select whether to:
- Enter Proposed Job Code
- To Create New Job Code – Contact HRMS/Compensation Specialist at extension 2166
- No Change (default) – If no change to job classification is requested

Enter Proposed Annual Salary (If applicable)

Select Requested Position Change Reason

Job Classification Information

Reg/Temp:	Regular
*Empl Class:	Support Staff ▾

○ **Use Existing Job Code**   ○ **Update Existing Job Code**
○ **Create New Job Code**   ○ **No Change**

Current:

Job Code/Title: 5016 Secretary   **Salary Plan:** HRY **Salary Grade:** 080 **Annual Salary:** $24,772.80

Proposed:

*Job Code/Title: 5020 🔍 Sr Secretary   **Salary Plan:** HRY **Salary Grade:** 100 **Annual Salary:** $26,000.00

Position Change Reason

Action: Position Change   ***Reason:** Job Re-Classification ▾

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5. Enter Standard Hours/FTE

If Reg Position,
> Make changes to Standard Hours as applicable; FTE will populate based upon Standard Hours

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Standard Hours/FTE

*Standard Hours: 40.00   **FTE:** 1.00

[<< Search]   [Next >>]

6. Enter Budget Information

Budget Information will populate from the department budget table. Make requested changes as applicable to:
- Speedtype(s)
- Distrb %(s) (Must total 100%)
- Funding End Date (If Grant or Contract)

Add Position Request (PRF)

Step 2 of 3: Budget Information

Complete the fields below with the appropriate budget information that is being requested.

Position Information

Requested Action:	Update Existing Position	**eForm ID:**	202668
Position Number:	00020143		
Proposed Job Code/Title:	5020	Sr Secretary	
Incumbent(s):			

Budget Information

*Speedtype(s)	Combination Code(s)	*Distrb %(s)	Funding End Date		
00759-11333	1051-C0046-A0234-N/	100.000		⊞	🗕

Distribution % Total: 100.000

[<< Previous] [Next >>]

Add Position Request (PRF)

Step 3 of 3: Finalize Form

Enter any relevant information requested where indicated and/or comments in the "Your Comment" field to be included with this form.

Position Information

Requested Action: Update Existing Position

Position Number: 00020143

Proposed Job Code/Title: 5020   Sr Secretary

Incumbent(s):

Action(s) & Reason(s)

	Action	Reason
1	Position Change	Job Re-Classification

Attachments

Description [⌄]   Add New Document

	View	Description	File size	Author	Created Date/Time	
1	View				10/17/11 11:21:26AM	−

Comments

Your Comment:

Reclassify to Sr. Secretary effective 10/1/2011.

Comment History:

<< Previous   Hold   Submit

7. Finalize Form

Message ☒

Submit this form? (24642,112)

The form will be directed to the next approver, if any.

[Yes] [No]

Add Position Request (PRF)

Step 3 of 3: Form Finalized

This form will now be forwarded to the appropriate Approver.

Position Information

Requested Action:	Update Existing Position
Position Number:	00020143
Proposed Job Code/Title:	5020 Sr Secretary
Incumbent(s):	

Form Status

eForm ID: 202668

You have just SUBMITTED this form. This action passed the form to UHC Coll/Div Business Admnstr for further processing.

Go To Worklist

View This Form

Go To eForms Home Page

Note: If there is a position change, the form will route to the HR Department for approval. If there is a Budget Change, the form will route to the Budget Department and Office of Sponsored Programs, if applicable.

Note: Once the HR Department, Budget Department, and/or Office of Sponsored Programs approves the form and it is executed, the initiator will receive an email informing them that the form has been authorized. The form will be available for view with the approved job classification and budget effective date.

8. View Approved Form

Navigation: **Department Self Service > eForms Home Page > View an eForm > Position Request (ePRF)**

View Position Request (PRF)

Step 1 of 2: View Position Request
This page displays the data that was entered on the form and associated comments.

Position Information

Requested Action: Update Existing Position   Position Data

Position Number: 00020143

Incumbent(s):   Barbara Kelley

New Position Information		Current Position Information		
Effective Date:	10/01/2011	Effective Date:	09/01/2009	eForm ID: 202668
Department:	C0046 SOE Dean's Office	Department:	C0046 SOE Dean's Office	
Business Unit:	HR759 UH Clear Lake	Business Unit:	HR759 UH Clear Lake	
Location Code:	C601 Bayou Building	Location Code:	C601 Bayou Building	
Reports To Position:	00020151 Sr Business Coord	Reports To Position:	00020151 Sr Business Coord	
Reg/Temp:	Regular	Reg/Temp:	Regular	
Empl Class:	Support Staff	Empl Class:	Support Staff	

◉ **Use Existing Job Code**   ○ **Update Existing Job Code**

○ **Create New Job Code**   ○ **No Change**

Current:

| Job Code/Title: | 5016   Secretary | Salary Plan: | HRY | Salary Grade: | 080 | Annual Salary: | $24,772.80 |

Proposed:

| Job Code/Title: | 5020   Sr Secretary | Salary Plan: | HRY | Salary Grade: | 100 | Annual Salary: | $26,000.00 |

Approved:

| Job Code/Title: | | Salary Plan: | | Salary Grade: | |

Hiring Range: From: To:

| Standard Hours: | 40.00 | FTE: | 1.00 | Standard Hours: | 40.00 | FTE: | 1.00 |

New Budget Information

Speedtype(s)	Combination Code(s)	Distrb %(s)	Funding End Dt
00759-11333	1051-C0046-A0234-NA	100.000	

Current Budget Information

Speedtype(s)	Combination Code (s)	Distrb %(s)	Funding End Dt
00759-11333	1051-C0046-A0234-NA	100.000	

Action(s) & Reason(s)

	Action	Reason
1	Position Change	Job Re-Classification

Inactivate an Existing Position

Search Fields

☐ Create a New Position

☐ Update an Existing Position

☐ Inactivate an Existing Position

If a position has been eliminated due to budget constraints, HR will inactivate the position. If the department chooses to inactivate a position, making it unavailable for future use, please contact the HRIS/Compensation Specialist in the Office of Human Resources.

Notes: