The University of Texas Rio Grande Valley

HUMAN RESOURCES
PORTAL

HR Portal

Spring 2023 Edition – Rev. 01/23/2023

New Hire

Change of Job Data

Change of Location / Supervisor

Change of Funding Source

Stipends

Employee and POI Separations

Tuition Assistance

Key Request

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INTRODUCTION

The Human Resources Portal (HR Portal) will act as the HRMS system to submit employee request forms. This system has improved design, look, and feel, by adding fluid titles. The HR Portal is more user-friendly, and it synchs daily with current PeopleSoft (PS) data, eliminating the need for creators to look up current assignment information and manually entering it. The web page load time has also been improved, making the system faster than its predecessor. All these changes will improve the hiring and onboarding of student employees, faculty, and staff. The key request form is a new feature in the HR Portal, replacing the iShop request form which can be used for all existing employees. This key request form in the HR Portal will transfer the data for the key and access

requests directly to the facilities and campus police systems. With the daily loads from PS, the data is prepopulated on current and proposed sections in all the forms including Banner IDs and account distribution information. A new dashboard that will list, all currently pending items for users/roles.

COMMON DEFINITIONS

Approver: The approver is the person who reviews and approves the workflow in the form.

Assistant Dean: The approver from an academic school or college who reviews and approves a faculty or graduate assistant assignment.

Cost Center / Project Number: This is an assignment of the funding source.

Change of Funding source (CFS): This form is used for updating the funding of an employee's current assignment.

Change of Job Data (CJD): This form is used for proposing changes to a current employee's job data such as hiring dates, number of hours per week, position, rate of pay, department, location, or room number.

Creator: The person who creates the New Hires form (NH), Change of Job Data (CJD), Change of funding sources (CFS), or Stipend.

Chartfield Manager: The person responsible for the cost center or project.

Employee Classifications: This is the classification of a position, also known as "Empl class." See page 55 for the list.

Hiring Official: The person in the department who reviews and approves a faculty or graduate assistant assignment.

HR: Office of Human Resources

Location/Supervisor: This form is used only for location and/or supervisor changes otherwise use a CJD instead.

New Hire (NH): This form is used for processing a candidate as a direct wage (student and work-study). A candidate is usually an individual who is new to the university or has not worked for the university for the last six months.

PeopleAdmin: This is the applicant tracking system used for hiring new employees for Faculty, Staff, or Graduate Assistantship positions. PeopleAdmin can be accessed through the my.utrgv.edu portal.

Separation Form: This form is used to notify various departments including HR that an employee is leaving the university so that proper processes may take place.

Stipend: A stipend is used to process an additional assignment for an employee outside their normal job duties for a specific time. This only applies to exempt employees.

Workflow: This is the series of approvals needed to process the forms. The last approver is Office of Human Resources. The number of approvers required in a workflow depends on varied factors such as employee classification. See the "Workflow Approver" chart for the full list of approvers.

BEFORE YOU BEGIN HERE ARE A FEW THINGS TO KEEP IN MIND

1. **If you are hiring a new faculty, graduate assistantship, or full-time staff, do not proceed in this system. You must use the PeopleAdmin system.**

2. **How To Request Position Numbers.**

   The instructions to request and review the process for creating new positions are found on the Position Control website; www.utrgv.edu/planning-and-analysis/services-and-resources/position-control/. Position numbers are needed only when the department does **NOT** have a vacant position number that can be reused. The position numbers belong to a department; therefore, the department is rarely changed when processing forms.

3. **Discuss hiring or changes with the hiring and/or project manager beforehand.**

   Typically, any hiring or changes are expected to be discussed beforehand with the hiring official and/or cost center/project manager. Since this system does not allow attachments, if additional documentation is required by any of the participants in the workflow, please provide it to the respective approvers before creating the form. This will help expedite the workflow.
   If the approvers have any questions about a specific form, they will call the department before approving or rejecting it.

4. **The creator must have the Cost Center or Project information and verify the manager.**

   The Creator must have the cost center or project information handily when creating the forms. The system will route approvals to the manager of the cost center or project being used. If the cost center information is not correct or not found, a UTRGV Project Key Member Update form / UTRGV Cost Center Key Member Update should be submitted via PeopleSoft before creating the form. If Project information is not correct or not found, contact the Grant Accountant. Please note that updates to cost centers and projects in PeopleSoft might take a day or two to reflect in the HR Portal.

5. **Know the pay distribution, and annual salary.**

   The creator of the forms must know the annual salary (how much the employee would be paid from September through August). Review the distribution percentages.

6. **Prepare documentation for international employees.**

   Verify if the prospective employee is on a VISA (and the type of VISA: F1, H1B, OPT, etc.) and/or if the employee is a non-resident. If hiring an international student, the student must complete the On-Campus Employment Eligibility Form. The On-Campus Employment Eligibility Form must be reviewed by the International Admissions Student Services office before any NH/CJD approvals

   For questions regarding hiring international student employees, contact the Office of International Admissions & Student Services at International@utrgv.edu

For questions regarding the hiring process/requirements of international non-student employees, visit the UTRGV Immigration Services website at www.utrgv.edu/human-resources/current-employee/immigration/.

7. Provide criminal background check (CBC) link to the prospective employee.

Departments are required to provide the CBC link to a secure online form to prospective employees. A unique CBC link will be provided by the department head to the individual who has been asked to complete a Criminal Background Check form.

For work-study and direct-wage employees, the CBC link is provided by the Student Employment Office. For faculty, the assistant dean of each college will provide the link.

For the rest of the staff, the CBC link is provided by the recruitment area in Human Resources.

The CBC link can only be used for the same position. Do not use the same link for different classifications (for example, do not use the work-study code for a full-time position, or a clerk position for someone who needs to drive a university vehicle) as each Criminal Background link is related to the type of work the employee is to perform.

8. Provide an I-9 form link to prospective employees.

This site, to be completed by the prospective employee, will take them through the process of filling in your I-9 in a few simple steps. The second step is for the prospective employee to show original documentation to the Office of Human Resources as instructed on the I-9 website. The process is not complete without this second step.

Notify the employee that the I-9 form should be completed and presented to the Office of Human Resources. Human Resources will not process an NH form until the I-9 form is submitted and the original document has been presented.

Login site to the I-9 form for The University of Texas Rio Grande Valley can be accessed at ww.secure.i9.talx.com/preauthenticated/LoginCAPTCHA.ascx?Employer=17817 and it is also available under the "Resources" section of the HR Portal.

9. If hiring a direct wage, work-study, or SEI employee, make sure you have the job id corresponding to the job title being hired for.

The Job ID for a Direct Wage, Work-study, or Student Employee Initiative (SEI) job title is provided on the Handshake website found at Joinhandshake.com/

Handshake is a database where departments can review student resumes, contact students directly, and post job openings for work studies and direct wages.

If your department does not have a Handshake username and password, it is recommended that you contact the Student Employment Office to register. Departments should not register directly from the site since it will treat the department as an external entity and have restrictions on certain features.

Direct Wage information including salary ranges, job type, and duties such as a Tutor Academic Assistant; Student Assistant; Project Associate; or Part-Time Non-Student, can be found on the Handshake website under "Student Employment (On Campus) & Official Job Descriptions.

LOGIN

To access the Human Resources Portal visit hr-portal.utrgv.edu, and enter your UTRGV email and password. Once logged in you will be prompted to this main menu.

UTRGV Office of Human Resources
Human Resources Portal

Login

⚠ Username and/or password did not match our records. Please try again.

UTRGV Email:

@utrgv.edu

Password:

Login

To protect your personal information, please close ALL open browser windows when you sign out.

If you are not able to log in, please contact the Office of Human Resources:

Edinburg: (956) 665-2451
Brownsville: (956) 882-8205
Harlingen: (956) 296-1415

Office of Human Resources:
www.utrgv.edu/human-resources

Note: Unauthorized use of this site is prohibited and may result in civil and criminal prosecution. Usage may be subject to security testing and monitoring.

If trying to access the HR Portal from an off-campus location, it will require you to first log into a VPN (Virtual Private Network) connection before proceeding. For more information on VPN connections, visit www.utrgv.edu/it/software/virtual-private-network.

MENU

The Main Menu includes links to more options:

Forms- This menu option directs you to options such as creating new hires, changing job data, changes of location/supervisor, changes of funding source, creating stipends, searching forms, searching, and filtering reports, and searching resources.

Separations- This menu option directs you to options such as creating separations for employees and POIs.

Tuition Assistance- This menu option directs you to options such as applying for tuition assistance, reviewing tuition assistance program applications, request for a course substitution, and a guidelines option that will help you with the applications.

Key Request- This menu option directs you to options such as requesting a key and/or access card and viewing and approving key request forms.

MAIN MENU

FORMS

The Main menu can be found on the top left of the page, this menu can take you directly to any form below.

FORMS

- Dashboard
- New Hires
- Job Data
- Location/ Supervisor
- Funding Source
- Stipends
- Search
- Reports
- Resources
- Help

ADMINISTRATOR

SEPARATIONS

TUITION ASSISTANCE

KEY REQUEST

- Return to Home Page
- Log Out

SEPARATION FORM

- Create (Employee)
- Create (POI)
- View
- Search

FORMS

TUITION ASSISTANCE

KEY REQUEST

- Return to Home Page
- Log Out

TUITION ASSISTANCE

- Apply
- View/Approve
- Course Substitution
- Guidelines

FORMS

SEPARATIONS

KEY REQUEST

- Return to Home Page
- Log Out

KEY REQUEST

- Key Request
- View/Approve
- Report
- Interface

FORMS

SEPARATIONS

TUITION ASSISTANCE

- Return to Home Page
- Log Out

FORMS

This forms menu option directs to a list of

Dashboard	New Hire	Change of Job Data
Change of Location / Supervisor	Change of Funding Source	Stipend
Search	Reports	Resources
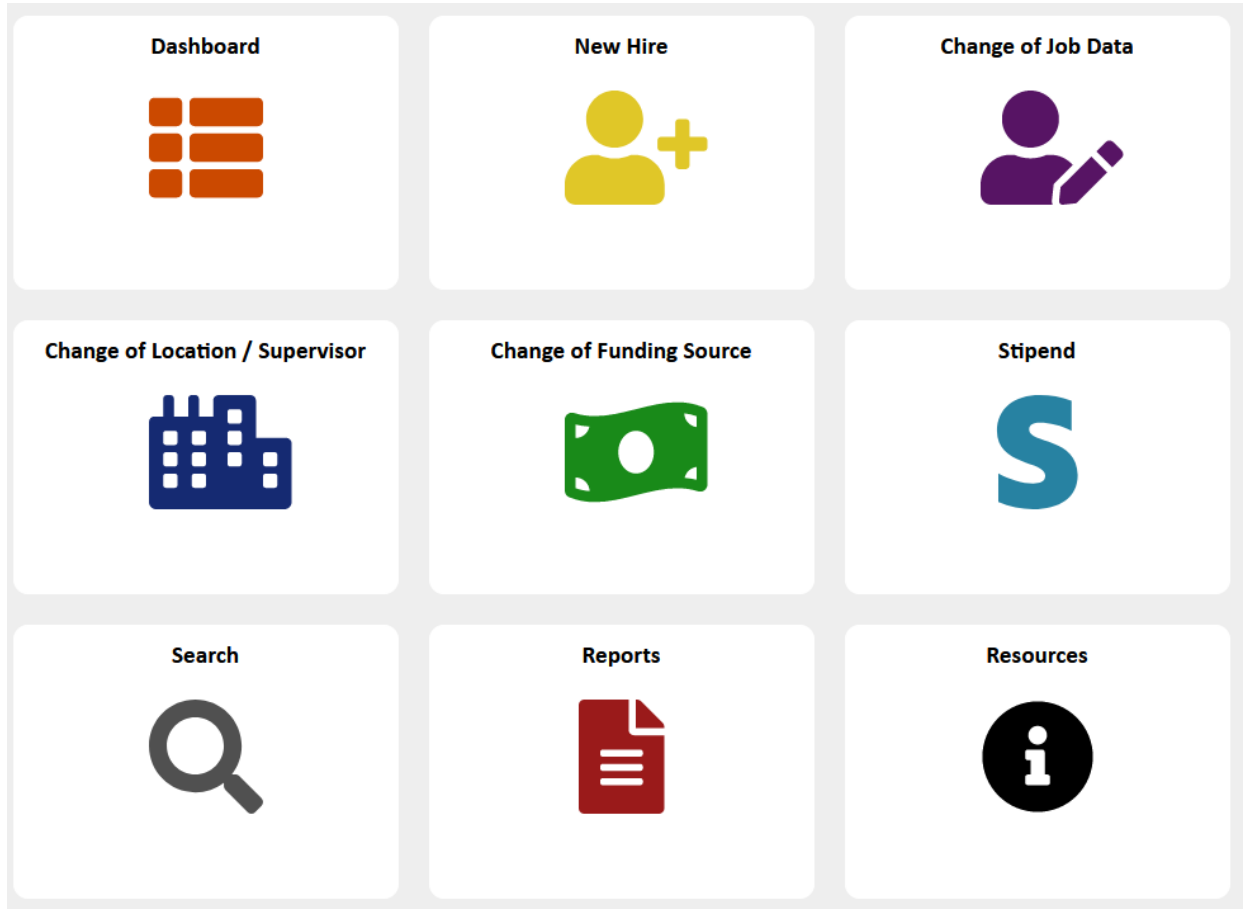
DASHBOARD

This menu directs you to the list of options.

Dashboard

Below is a dashboard for HR job forms (such as New Hires (NH), Change of Job Data (CJD), Change of Location/Supervisor (CLS), Change of Funding Source (CFS), Stipends, Key Request etc.) that are **pending your approval**.

Pending Approval

Click on each of the sections below to show/hide lists of corresponding forms **pending your approval**.

‣ Change of Location and Supervisor (0)
‣ New Hire (0)
‣ Change of Job Data (1)
‣ Stipend (0)
‣ Change of Funding Source (0)
‣ Key Request (2)

NEW HIRE FORM (NH)

PURPOSE

This menu option directs you to the form for creating a New Hire. Use this form when hiring an individual as a new student employee (direct wage or work-study) who has not worked for the university before or who has been inactive as a UTRGV employee for more than six months. If your department is hiring an existing UTRGV student employee, please refer to the Change of Job Data instead.

NOTE: For NEW full-time and part-time faculty, staff employees and Graduate Assistant positions use PeopleAdmin. For faculty, contact College Coordinators for assistance.

NAVIGATE TO NEW HIRE FORM:

On the HR Portal Page, go to Forms, then click on New Hire Form
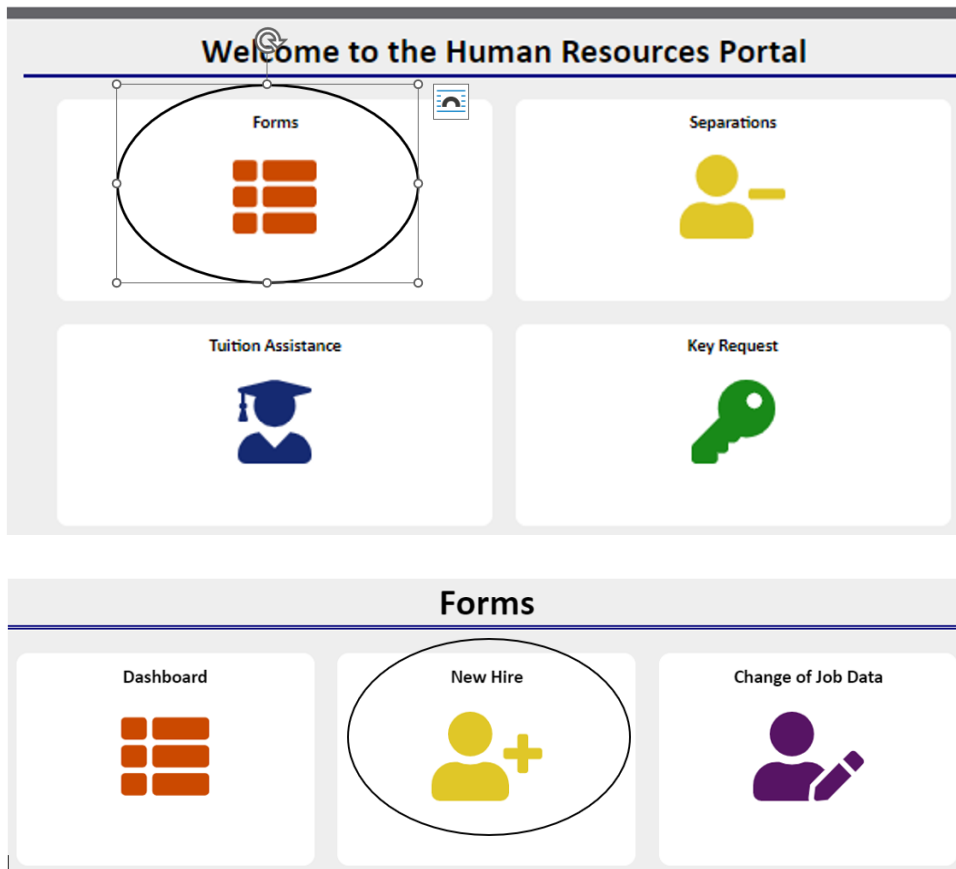
WHAT YOU WILL NEED FOR NH FORM

For the NH Forms, you will need to know:

- Employee's first and last name
- Employee ID (if known)
- Student Banner ID
- Employee Birthday (For Student Workers)
- Employee Email
- Position # to be used.
- Location
- Start/End Dates
- Cost Center information
- Rate of Pay
- International Information

EMPLOYEE INFORMATION

To begin the New Hire, provide the basic information of the person to be hired as shown below.

The month and date of birth are required for verification purposes because there might be multiple employees with the same first and last name.

ⓘ Why is the email address required?

If processing a new employee, this person will not have a UTRGV email address. In this case, provide their personal email. This is required by departments to contact the prospective employee in case they have any questions during the hiring process. It is also used for sending the UTRGV credentials once their profile has been created in PeopleSoft. If the employee is a student, they will have a UTRGV email address along with a Banner ID.

NEW PROPOSED POSITION NUMBER INFORMATION

Position numbers are an essential part of the HR Portal as this is required in PeopleSoft. The position number must first be created and exist in PeopleSoft before it can be assigned to an employee.

Search for the position number by clicking on the "Search Position Number" or "Search by Department". If you do not know the position number reach out to the person in your department that manages the list of position #s. Positions should have only one incumbent; therefore, do not tie more than one employee to a position. Vacant positions can be reused.

New Proposed Position Number Information

Search Position Number

Search Position Number Information

Enter the complete position number or department name. If you do not know the Peoplesoft Position Number, contact Position Control.
For more information about PeopleSoft Position numbers, view the Quick Guide to PeopleSoft Positions.

Search by position #: [   ] or
Department Name: [   ]

Search

Once you search by position number, a list of all positions about that position will be displayed. The position number contains the job code, job title, hours, FTE, occupant (if currently filled), employee classification, business unit (division), department, location (building), city, supervisor, and reports to (position number of supervisor).

	Position #	Job Code	Job Code Title	Hrs	FTE	Occupant ID and name	Emp Class	Business Unit	Department	Location	City	Supervisor	Reports to	Reports to Title
○	70054670	10054	WS Student Assistant	19.00	0.475	: ,	WS	Div Strat Enrol & Studnt Affrs	Center for Student Involvement	EUCTR	Edinburg	6001253211: Guzman, Patricia	70077443	Program Coord

NOTE: After selecting a position, review details to make sure that at least the job title and department are correct for this employee. Other position information can remain the same or be updated as needed.

Once you select the position number and continue, the pop-up box will close, and the position number information box and supervisor information will be prepopulated on the form.

PROPOSED REPORTS TO/SUPERVISOR INFORMATION

In PeopleSoft, the position is linked to the position number of the supervisor and not to the employee ID of that supervisor. If the Reports to Position is filled, the name and employee ID of the supervisor will be shown. This field is important since timecards are approved by the person in the Reports To position. Make sure that the position you are selecting contains a Reports To number and that it is the correct one. If not, you will need to update it.

PROPOSED HANDSHAKE JOB ID

If hiring a student employee, the Handshake Job ID provided to departments is required to process the New Hire Form. Handshake is the online career management system for UTRGV students. If you have any questions or need further assistance regarding Handshake, contact the Student Employment Office at (956) 665-2243, (956) 882-5627, or email Handshake@utrgv.edu.

⬥ **Proposed Handshake Job ID**

Handshake Job ID:

[ ] * Required for student employees. *

If you don't have a Handshake Job ID, please contact Student Employment Office to request one.

PROPOSED CAMPUS LOCATION FOR THE POSITION NUMBER

The Campus City, Location, and Office/Room # fields will be auto populated based on the position number. You may update this information if needed by selecting the Search Location button.

NOTE: You will need to manually input the Office/Room # and the Department Phone if it is not prepopulated

🏛 **Proposed Campus Location for the Position Number**

[Search Location]

Campus City:

[ ]

Campus Location:

[ ]

Office/Room #:

[ ]

Department Phone:

[ ] [999-999-9999]

PROPOSED START/END DATES

◼ **Proposed Start/End Dates**

Proposed Start Date:

[⌄] [⌄] [⌄]

Proposed End Date:

[⌄] [⌄] [⌄]

⚠ *Proposed Start Date must be greater than today. Proposed Start Date does not mean the employee may start working on that day. Clearance from HR must first be received before employee may begin to work.*

Proposed Start Date - Enter the date that the employee is expected to start working. The Proposed Start Date must be greater than the current date (day from is being created), after the day the form is being created.

ⓘ **Proposed Start Date vs HR Hiring Date**
The Proposed starting date entered by the department **may sometimes not** be the date the employee can start working. Clearance from HR must first be received before the employee may begin to work.

Proposed End Date – Enter the date the employee is expected to finish work.

PROPOSED COST CENTER

The Proposed Cost Center(s)/ Project(s) and the percentage of funding source will be pre-populated from the position number. Review, update as needed and enter the and enter the annual amount.

If an update to funding is needed, click on the "Search" button to open the pop-up box that will list all PeopleSoft cost centers and/or projects. The creator is required to enter the complete cost ctr / project number. The percentage of funding must add up to 100%

Annual Amount: This annual amount is what the Staff, Medical Residents, or A&P employees would be paid for the full fiscal year (from September to August) as an FTE of 1.00. The annual amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the period. For example, if hiring a full-time staff with an FTE of 1.00 for the whole fiscal year and the Annual Amt is $24,000, that amount is entered even if the employee were to start later in the year, or if the FTE was less than 1.00.

Contract Amount: The contract amount is what the faculty employee would be paid for the length of the contract (e.g., from September to May or in other cases September to August) as an FTE of 1.00 for the contract period. The contract amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the contract period. For example, in those cases when hiring a full-time faculty who begins employment later in the year (Spring), or if the FTE is less than 1.00 then the department will need to provide the prorated contract worth amount to ensure that the faculty do not receive an overpayment.

If using more than one funding source, the total of all lines should add up to the Total Annual Rate and the percentages should total 100%. Example: For an employee working for 10 months for an annual amount of $24,000, if using two projects, one with a Funding Source of 75% and another with 25%, the annual amounts would be $18,000 and $6,000, respectively.

Rate Calculator: If the student-employee will be working for a certain amount of financial aid awarded, you can open the rate calculator and calculate the worth rate of pay.

RATE OF PAY

The rate of pay will depend on the type of part-time staff position. For student-employees and part-time non-students, enter the Hourly Rate of Pay; for Graduate Assistantships, enter the Contract Worth Rate of Pay; and for AmeriCorps, enter the Annual Amount. This section is not needed for faculty and full-time staff.

INTERNATIONAL INFORMATION

Select if the prospective employee is International and if so, provide the type of Visa.

WORKFLOW INFORMATION

Once you continue, the system will check for any missing information. If all the information is correct, it will generate a workflow list after the Contact Information section based on the information provided. See the Workflow section on page 59.

↳ **Workflow for**

Title/Department	Email	Status
Creator/Originator	gloria.perez03@utrgv.edu	Submitted on at
Manager 1	michael.mueller@utrgv.edu	Pending
Student Employment	Jose.Quezada@utrgv.edu	Pending
Position Control	Jose.Quezada@utrgv.edu	Pending
Human Resources	Jose.Quezada@utrgv.edu	Pending

PROJECT MANAGER CHANGE (OPTIONAL)

There will be cases where the cost center or project is unavailable and someone else needs to approve on their behalf. The HR Portal allows you to change the manager for the New Hire Form by clicking on the "Search Employee" button and searching for the manager and providing the justification.

Project Manager Change (optional)

If michael.mueller@utrgv.edu is not the manager for project # or if manager will not be able to approve due to being on leave, choose the project manager's replacement (usually the alternate manager) from below and select a justification for this change. Otherwise leave as is.

Search Employee | New Manager's ID: [ ] Email: [ ]

Select justification for this change ▾

*Note: If cost center manager is not updated, complete a Project Key Member Update form from Accounting & Reporting to reflect this change for future HR Portal forms.

ADD ANOTHER APPROVER

Sometimes a department may want someone to review and approve the New Hire Form before it goes to the cost center manager. The creators have the option to do so by selecting the employee from the "Add another Approver" section.

EMAIL MESSAGES

By default, email notifications are sent to those next in the workflow notifying them of approval needed. There is also an option to not send the automated email. This would be used in those cases when a department is creating many consecutive New Hires Forms thus all email notifications would not be needed.

Note: Certain departments such as Position Control and Human Resources have opted to have the default set to "No." There is no need to notify them via email that a New Hire Form is pending since they are looking at their pending items in the HR Portal throughout the day.

ADDITIONAL COMMENTS

Provide a brief comment regarding the purpose of the New Hire Form. This is optional.

Note: Even if you select not to send out an email, comments entered here will be available for anyone to view.

Click on "Continue" to submit the New Hire Form. A confirmation page will be displayed.

CHANGE OF JOB DATA FORM(CJD)

PURPOSE

A Change of Job Data is required when there is a change in an employee's:

- Funding Source (Cost Center, Grant, etc.)
- Hiring Date
- Ending Date (if the end date is due to a separation from the university, use the separation form instead)
- Number of hours per week
- Position Number
- Job Title
- Rate of Pay
- Division/Department (moving to another division or department)
- Reports To
- Location (city, building, and office number)
- Any other correction to an earlier New Hire Form or Change of Job Data Form

When NOT to submit a Change of Job Data Form

- If the only change in the employee information is their name (last name from single to married, for example), no Change of Job Data Form is required. The employee should submit a request in PeopleSoft through the employee self-service.
- If the only change is the supervisor and/or location (building or office), then submit a "Location/Supervisor" form instead. This is a shorter version of the Change of Job Data form that does not require additional information such as cost center numbers and workflow approval.
- If an employee (full-time, part-time, faculty, staff, work-study, etc.) is separating from the university, a Change of Job Data Form is not required. A Separation form should be submitted instead (see "Separation Form" section for information).
- If the only change is to funding source, submit a change of funding source (CFS). This form is not routed to HR.

NAVIGATING TO THE CHANGE OF JOB DATA FORM

On the HR Portal Page, go to Forms, then click on Change of Job Data Form

Forms

Dashboard	New Hire	Change of Job Data
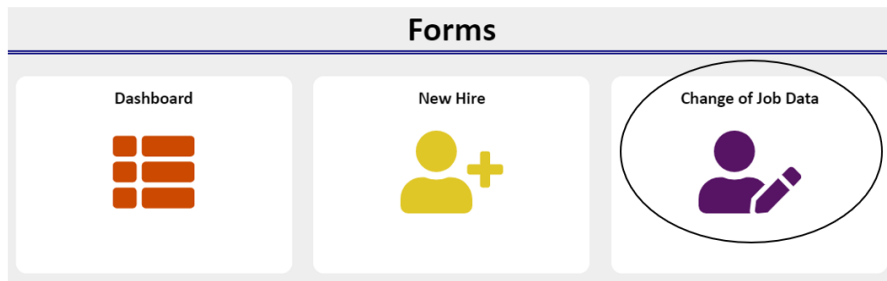
SEARCH EMPLOYEE TO UPDATE

On the first page of the Change of Job Data Form, enter the complete employee id and/or first name (minimum three characters) and/or last name (minimum three characters) of the employee needing the update.

Create A Change of Job Data Form

About this form: This form is used when a current employee is being promoted, demoted, having a change in department, change in assignment date, or change in rate.

⚠ **NOTE:** *If the only update is the funding source of an employee's assignment, please use the Change of Funding Source (CFS) form instead.*

Lookup Employee Information

Search for employee information to create a **Change of Job Data** form.

Employee ID:

First Name:

Last Name:

Search ===>

NOTE: Employees cannot submit their Change of Job Data Form. A supervisor or another employee will need to submit on their behalf.

From the results, select the employee and position # you want to make changes to.

	Emp ID	Employee Name	Job Title	Department	Position Number
○	6001256626	Perez, Gloria Bridyit	10054: WS Student Assistant	Registrar	70007982
○	Create a blank Change of Job Data form.				

Create Form ===>

EMPLOYEE INFORMATION

On the next page, most of the fields will be prepopulated based on the employee and position selected including Banner ID and cost center/project information.

The current information will be in the left column and the proposed information will be in the right column. Data in the proposed column needs to be reviewed/updated as needed.

To update the proposal, click on the search position number box in the section. When selecting a new all current position elements will be brought into proposal section. You may change elements as needed except on non-budgeted positions; the title or department should not be changed.

Position #	Job Code	Job Code Title	Hrs	FTE	Occupant ID and name	Emp Class	Business Unit	Department	Location	City	Supervisor	Reports to	Reports to Title
○ 70007397	10059	Student Asstant	19.00	0.475	6001253496: Carretero, Brainda Yannell	STU	College of Sciences	Sch of Earth Env & Marine Sci	BLHSB	Brownsville	6001044777: Berg, Karl	70079640	Associate Professor

PROPOSED BRIEF DESCRIPTION

When creating a Change of Job Data Form, a brief description/justification for the change is needed. For a list of examples of what to include in the description box, see the "Brief Description Examples" section found at end of this manual.

Proposed Brief Description

Please provide the justification for this CJD. If faculty, include a list of courses or duties for this assignment. (limit to 600 characters):

For examples of what to include in the description, click here.

Update other fields as needed.

FACULTY DEVELOPMENT LEAVE (FDL)

When preparing a Change of Job Data for faculty development leave, please follow the recommended steps below.

Under the "Proposed Position Number Information" section, update the hours per week as per the approved Faculty Development Leave so that position control may update the FTE accordingly in PeopleSoft.

The brief description information section is especially important for Human Resources, this is needed so that we understand what needs to be updated on the employee job record. We highly recommend using the wording below when submitting the Change of Job Data form for faculty development leave (FDL) employees.

PROPOSED HANDSHAKE JOB ID

If making a Change of Job Data Form for a student employee, the Handshake Job ID provided to departments is required to process the Change of Job Data Form. Handshake is the online career management system for UTRGV students. If you have any questions or need further assistance regarding Handshake, contact the Student Employment Office at (956) 665-2243, (956) 882-5627, or email Handshake@utrgv.edu

⬦ Proposed Handshake Job ID

Handshake Job ID:

[ ] * Required for student employees. *

If you don't have a Handshake Job ID, please contact Student Employment Office to request one.

PROPOSED START/END DATES

For the proposed Start/End date section, provide the dates the employee will be on developmental leave. See the example below:

▣ Proposed Start/End Dates

Proposed Start Date: Proposed End Date:

[⌄] [⌄] [⌄]   [⌄] [⌄] [⌄]

PROPOSED COST CENTER

In the Proposed Cost Center section, indicate the employee's salary during developmental leave. Please double-check that the "Annual Amt" column contains the payment amount the employee will receive during Developmental Leave.

Note: "Annual Amt" may not change for employees on FDL for one semester. Please refer to the approved FDL form.

▢ Proposed Cost Center

Enter the cost center number(s) of the corresponding source(s) of funding.

🗌 Open Rate Calculator

	Cst Ctr/Prjct	Name	% Fund. Source	Annual Amt	Clear
🔍	21000040	Finance and Administration	75	18000	✖
🔍	21000042	Planning and Analysis	25	6000	✖
🔍					✖
🔍					✖
🔍					✖
🔍					✖
				$24,000.00	

If an update to funding is needed, click on the "Search" button to open the pop-up box that will list all PeopleSoft cost centers and/or projects. The creator is required to enter the complete cost ctr / project number. The percentage of funding must add up to 100%.

Search Cost Center/Project Information

Search for cost center or project information.

Cost Center#:

Project #:

Description:

Search ===>

Annual Amount: This annual amount is what the Staff, Medical Residents, or A&P employees would be paid for the full fiscal year (from September to August) as an FTE of 1.00. The annual amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the period. For example, if hiring a full-time staff with an FTE of 1.00 for the whole fiscal year and the Annual Amt is $24,000, that amount is entered even if the employee were to start later in the year, or if the FTE was less than 1.00.

Contract Amount: The contract amount is what the faculty employee would be paid for the length of the contract (e.g., from September to May or in other cases September to August) as an FTE of 1.00 for the contract period. The contract amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the contract period. For example, in those cases when hiring a full-time faculty who begins employment later in the year (Spring), or if the FTE is less than 1.00 then the department will need to provide the prorated contract worth amount to ensure that the faculty do not receive an overpayment.

RATE OF PAY

The rate of pay will depend on the type of part-time staff position. For student-employees and part-time non-students, enter the Hourly Rate of Pay; for Graduate Assistantships, enter the Contract Worth Rate of Pay; and for AmeriCorps, enter the Annual Amount. This section is not needed for faculty and full-time staff.

($) Rate of Pay

Hourly Rate of Pay:
$ _____ (for hourly employees)

INTERNATIONAL INFORMATION

International Information:

Is the prospective employee going to work with a Visa?
○ Yes ○ No

If Yes, please specify type of visa:
None ⌄

If you answered 'No' to the question above, is the prospective employee a US Citizen/Permanent Resident or hold a valid Employment Authorization Document (EAD card)?

○ Yes ○ No

Select if the prospective employee is International and if so, provide the type of Visa.

CHANGE OF LOCATION/SUPERVISOR

PURPOSE

If the only change to an employee's information is the supervisor and/or location (building and/or office number), you should complete a Change of Location/Supervisor form. This form is a shorter version of the Change of Job Data Form and does not require additional information such as cost centers and workflow approval other than Position Control and Human Resources. If, however, there are changes other than the supervisor and/or location, submit a Change of Job Data Form, which also includes these two options.

> (i) Note: Employees cannot submit a location/supervisor change for themselves. A supervisor or someone else should submit the update.

NAVIGATING TO CHANGE OF LOCATION/SUPERVISOR

Click on forms and then on Change of Location/Supervisor
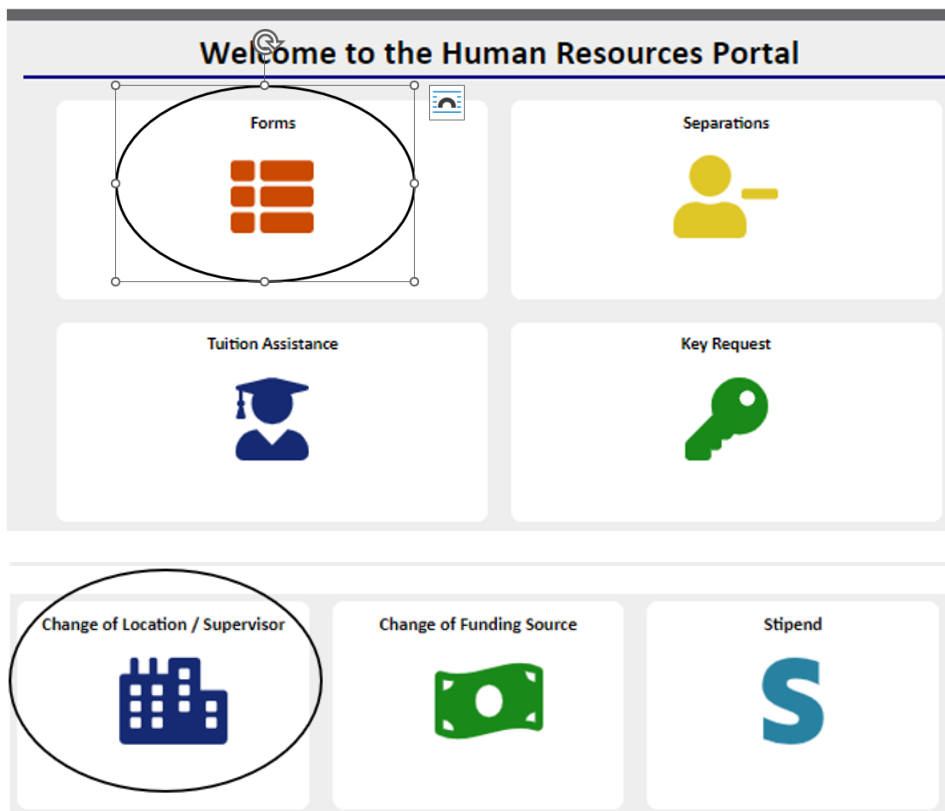
Search for the employee and enter the complete employee id and/or first name (minimum three characters) and/or last name (minimum 3 characters).

Create A Change of Location/Supervisor Form

About this form: Use this form to update the location (building / office number) and/or supervisor of an employee.

Lookup Employee Information

Search for employee information to create a **Location and Supervisor** form.

Employee ID:

First Name:

Last Name:

Search ===>

Create A Change of Location/Supervisor Form

About this form: Use this form to update the location (building / office number) and/or supervisor of an employee.

Lookup Employee Information

Search for employee information to create a **Location and Supervisor** form.

Employee ID:

First Name:

Last Name: garcia

Search ===>

Search results

	Emp ID	Employee Name	Job Title	Emp Class	Department	Position Number
○	60011	Garcia, Sergio	10034: Clinical AsstProfessor	FA2	Information Systems	70105688
○	60012	Garcia, Cristian	10059: Student Assistant	STU	University College	70105741
○	60012	Garcia, Edgar Aksel	10059: Student Asstant	STU	Center for Student Involvement	70041060
○	60012	Garcia, Amira	10059: Student Asstant	STU	Student Media	70042530

From the list of results, select the position requiring a change.

If the Reports to/Supervisor needs to be updated, click on Select "Reports To" position number.

PROPOSED REPORTS TO/SUPERVISOR INFORMATION

CAMPUS LOCATION

If the campus location needs to be updated, click on the "Search location" button for a listing of buildings and update the office/room number accordingly.

EFFECTIVE DATE

Enter the effective date of the change. In most cases, this date should not be before the 1st of the current month.

KEY REQUEST

Select if you will need a key request or not.

Note: Position Control and Human Resources are the only approval needed for this type of form.

CHANGE OF FUNDING SOURCE(CFS)

PURPOSE

If the only change to an employee's information is the funding of the current assignment, complete the Change of Funding Source form. It is important to note that this form will not update the employee's salary, assignment dates, or position information. This form will reduce the number of workflow approvers which in turn will reduce the amount of time to approve the fund changes.

NAVIGATING TO THE CHANGE OF FUNDING SOURCE

On the HR Portal click on Forms and click on Change of Funding Source
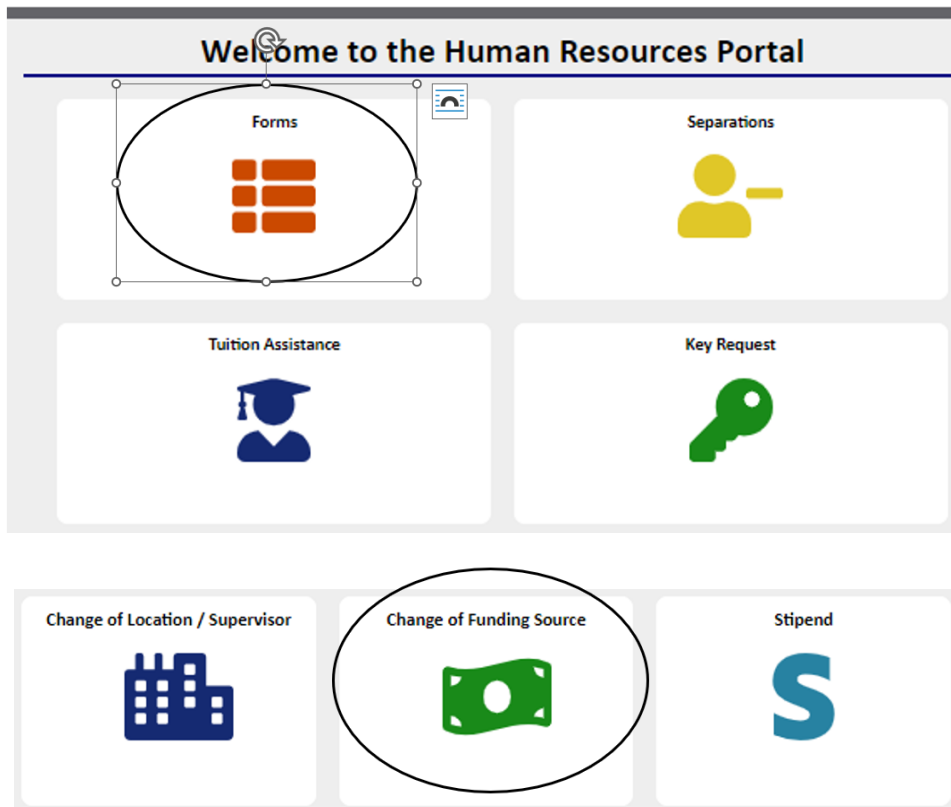
SEARCH EMPLOYEE TO UPDATE

Type in the complete employee id and/or first name (minimum three characters) and/or last name (minimum 3 characters) and press the "Search" button.

Create A Change of Funding Source Form

About this form: This form will only update the funding for the employee assignment. It will not update the employee salary or assignment dates. Funding changes for employees no longer in the same position, will require that a Change of Job Data be created. If you have any questions, please refer to the training manual.

Lookup Employee Information

Search for employee information to create a **Change in Funding Source** form.

Employee ID: [   ]

First Name: [   ]

Last Name: [   ]

[Search ===>]

There may be instances where more than one line will appear; select the assignment needing to be changed and press the "Continue" button.

Note: you cannot continue if there is currently more than one person tied to the position. A Change of Job Data Form is needed to move the employee to another position #.

EMPLOYEE INFORMATION

This section is prepopulated; therefore, cannot be changed. A Change of Job Data Form is needed instead.

Employee Information

UTRGV ID#: [   ]   Full Name: First: [   ]   Middle: [   ]   Last: [   ]

Position #: [   ]   Job Code/Title: [   ] [   ]   Emp. Class.: [   ]

Division ID: Division Name:
[   ]   [   ]

Division/College ID: Division/College Name:
[   ]   [   ]

Department ID: Department Name:
[   ]   [   ]

Note: If any of the employee information above needs to be updated, it is recommended to use a Change of Job Data instead of this form.

STIPEND INFORMATION

Since a stipend can be submitted with the employee's primary position # we need to know if the change is for the stipend and not the primary assignment. If yes, a stipend number is required.

Stipend Information

Is this CFS for a previously submitted stipend? ○ Yes ○ No

If yes, provide the stipend number: [   ]

BRIEF DESCRIPTION

Type a brief description justifying the change of funding source, there is a limit of 900 characters. Click here to direct you to the brief description examples page, reference number 7 in the list.

Brief Description

Please provide justification for change of funding source. Please limit to 900 characters or less.

[   ]

PROPOSED START/END DATES

Using the dropdown arrows, select the funding start and end dates. The funding changes will only be made effective for the dates specified in this section.

Proposed Start/End Dates

Proposed Start Date: Proposed End Date:
[∨] [∨] [∨]   [∨] [∨] [∨]

PROPOSED COST CENTER

Using the magnifying glass icon for each line item, review/update (if needed) the proposed cost center numbers and funding source percentage. Populate the annual amount on proposed cost center sections. Change the Annual Rate as needed. The percentage of funding must add up to 100%.

Annual Amount: This annual amount is what the employee would be paid for the full fiscal year (from September to August) as an FTE of 1.00 or contract period. The annual amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the contract period.

INTERNATIONAL

Indicate whether the employee is a permanent resident or a US citizen. If answer is "no" then a response to the subsequent question is needed. This information is needed for further review by the Grants and Contract office if funded from a Grant or a contract.

STIPEND (FACULTY AND STAFF)

PURPOSE

Stipends are used to process an added job for an employee (faculty or exempt staff) outside their normal job duties for a specific period. Stipends do not apply to student employees or non-exempt staff.

A stipend can be tied to the primary position number of the employee if all position data elements are the same. If any data elements are different, a new non-budgeted position should be requested. Go to the Position Control website (www.utrgv.edu/planning-and-analysis/services-and-resources/position-control) for instructions on requesting a new position number.

NAVIGATING TO THE STIPEND

Click On Forms then on Stipend.
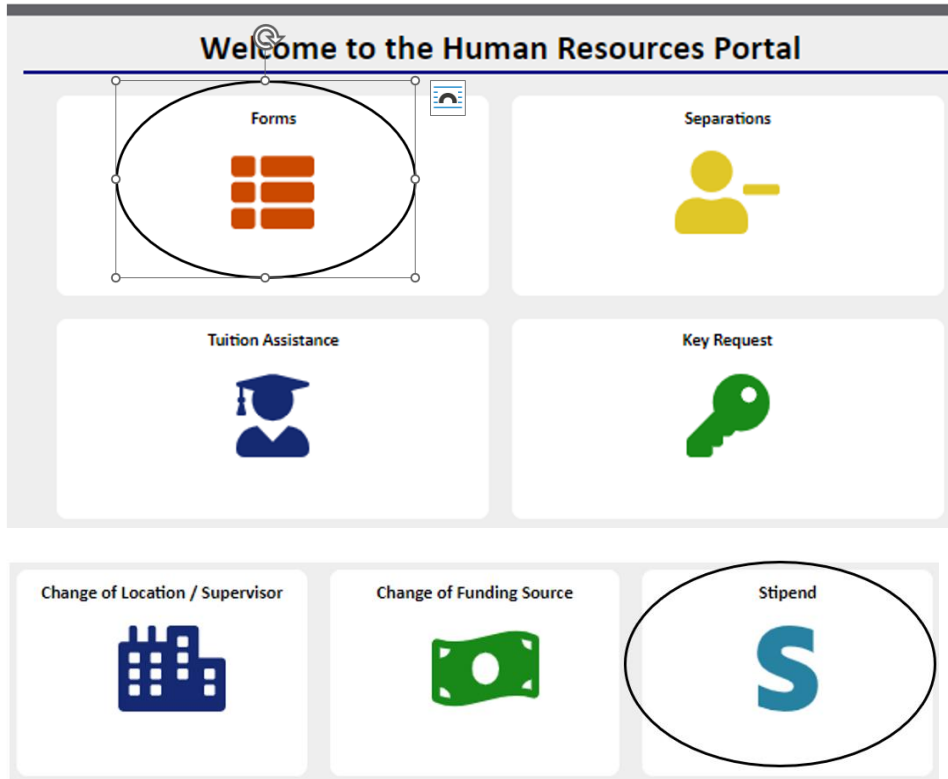
SEARCH FOR EMPLOYEE

Type in the complete employee id and/or first name (minimum 3 characters) and/or last name (minimum 3 characters) and press the "Search" button.

Select the position to which the stipend will be linked. If the employee has never had a stipend, the only position that will appear will be the employee's primary position. Click on this position to bring in the employee information. When the employee ID has multiple instances found with the search, make sure to select the correct one. If the employee does not have any lines, choose the Blank Stipend button.

PURPOSE FOR STIPEND

When creating a stipend, you will be asked for the purpose, either to create a new stipend for the employee or to update the information of a previously approved stipend,

Purpose for stipend

What is the purpose of this stipend?
○ To create a new Stipend for the employee listed above.
○ To update *the amount or other information* of a previous approved Stipend.

If you requested a new non-budgeted position, you may search for the position number by selecting "Search Position for Stipend". All the data in the following three sections (position, reports to, and cost center on proposed side) will change according to what was requested. Search for a position as instructed on page 16.

Update other fields as needed.

BRIEF DESCRIPTION
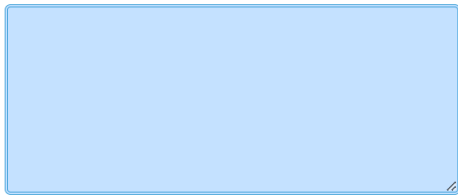
Provide a brief comment regarding the purpose of the Stipend Form. Departments can use the link provided below. It is a guide containing Human Resources' recommended comments to be used as brief description information. The recommended comments are examples that can be used for Change of Data Forms or Stipends.

Note that for faculty stipends, the level of effort must be included in the Brief description.

Proposed Brief Description

Please provide the justification for this Stipend. If faculty, include a list of courses or duties for this assignment. (limit to 600 characters):

For examples of what to include in the description, click here.

PROPOSED START/END DATES

When entering the start and end date for a stipend, please note that a one-day stipend is not allowed. A stipend must be created for a minimum of two days or more. For example, if you are wanting to pay a stipend for work done on 06/01/2023, you will use the proposed start date of 06/01/2023 and the proposed end date of 06/02/2023. See the example below.

PROPOSED COST CENTER

Search for the cost center(s)/project(s) if this needs to be changed from what may already be populated. If entering more than one cost center/project the percentages of funding must add up to 100%. Enter the amount to be paid for the assignment.

EDITING NEW HIRE FORMS, CHANGES OF JOB DATA FORMS, AND STIPEND FORMS

If New Hires, Changes of Job Data, and Stipends have not reached Position Control or Human Resources for approval, the creators, reviewers, and assistant deans can edit any proposed section and departments in the workflow and can edit certain sections of the form. One of the sections that cannot be edited is the workflow section. Human Resources is the only department that can modify the workflow such as changing the project manager or reviewer. To make an edit, click on the "Edit CJD" or "Edit NH" button found at the top right side of the page.

Depending on your workflow role as listed before, you will be able to edit certain sections of the form. Once the edit is made, describe the edits made and click on Continue.

📄 Purpose for editing CPAF #3100001

Edited by: gloria.perez03@utrgv.edu   (email of employee making changes)

Email notification for edits made to this document will be sent to those in the workflow who already approved, except when status is set to 'on-hold'. Additional emails might be included if they are new to the workflow caused by the edits.

Provide a brief description for the edits made. Please limit to 500 characters (size of textbox below).
Example: "Rate of Pay changed from $1.00 to $10.00 due to typo. This does not affect encumbrance since it was calculated with the $10 amount. Manager had already approved ePAF with previous amount but has been notified and he's okay of this change."

```
Correction made to the hours per week from 12 to 15. This does not affect the encumbrance or
annual amounts since those were calculated with the right hours per week.
```

An email notification will be sent out to those who approved and indicates which areas of the form were modified along with the comment.

If you want to read what other changes have been done to the form, open the form and click on the "View" section found at the bottom of the page. It will take you back to the form but on view mode only, and at the bottom of the page you can find the "view edits" section.

Email notification has been sent as follows:

From: sirisha.avancha01@utrgv.edu

To: mariele.partidalopez@utrgv.edu,michael.patriarca@utrgv.edu, Veronica.Gonzales@utrgv.edu

The following are edits to CJD# 3101057: [Text for justification/duties.] [International approval] [Pos. Cntrl approval] [HR approval]

Comments: Testing.

Email was not sent as per request.

The following are edits to CJD# 3101057: [Text for justification/duties.] [International approval] [Pos. Cntrl approval] [HR approval]

Comments: Testing.

Return to list of pending items.

Information for CJD #3101057 has been updated.

View

☁ View Edits to CJD #3100001

Depending on what was edited, the workflow is automatically updated. For example, if the question about Visa is changed from "No" to "Yes," the workflow will include International Office and they will need to approve before reaching Position Control or Human Resources.

FORM ON HOLD

There could be cases where Position Control or Human Resources may be waiting for a document or additional information from the department or employee to be hired before they can approve a New Hire. When this happens, Position Control or Human Resources will provide a comment documenting the reason for this hold.

The comments for the New Hire when the status is on-hold can be viewed in the "View Edits" section of the form.

☑ ⛏ **View Edits to CJD #3101042**

Edited on: 01/23/2023 at 10:56 a.m. by ~~database@eplan~~01@utrgv.edu
Status: On-hold.
Comments: testing
Edited Fields: [Assist. Dean approval] [Pos. Cntrl approval] [HR approval]

APPROVING NEW HIRES, CHANGES OF JOB DATA, CHANGES OF LOCATION/SUPERVISOR, CHANGE OF FUNDING SOURCE, AND STIPENDS

Once a form has been submitted, it is sent to the next person in the workflow. The form can either be approved or rejected by the recipient. The recipient has two methods to access the form, they can log into the HR Portal via the link provided in the email notification or via the my.utrgv.edu portal. Once logged in, click on the "Form" button from the main menu and then on "Dashboard". The dashboard will show all forms pending your approval only.

Dashboard

Below is a dashboard for HR job forms (such as New Hires (NH), Change of Job Data (CJD), Change of Location/Supervisor (CLS), Change of Funding Source (CFS), Stipends, Key Request etc.) that are **pending your approval**.

Pending Approval

Click on each of the sections below to show/hide lists of corresponding forms **pending your approval**.

▸ **Change of Location and Supervisor (0)**
▸ **New Hire (0)**
▸ **Change of Job Data (1)**
▸ **Stipend (0)**
▸ **Change of Funding Source (0)**
▸ **Key Request (2)**

Once you view the content, you can select to approve or reject the form.

When should an approver reject a New Hire Form? There might be cases where a New Hire does not have the correct information, such as a misspelled employee name or the wrong number of hours. An approver has the choice to either edit the form (explained on page 39) or have the creator or someone else in the workflow do the update. Once fixed, they can come back to the form, review it again and approve it. It is recommended to only reject if the New Hire requires too many edits or if the form is no longer valid (such as when the employee is not going to be hired after all).

The approver may select to send an email notification to the next person in the workflow. Keep in mind that some departments have opted not to receive emails, in this case by default, the email notification is set to "No" since there is no need to be notified.

The approver may provide additional comments. Even if no email notifications are going to be sent, the comments will be recorded in the HR Portal so that other approvers may read them.

Click on the "Continue" button to update the form based on your approval selection.

Note: If rejecting a New Hire, anyone who has already approved it, including the creator, will be notified via email that it has been rejected. It is recommended that you provide a brief description explaining why it was rejected.

SEARCH

This menu option directs you to a search where you can locate forms.

Search by Form #, Employee ID, First or Last Name, Position #, or Fiscal Year

You can use this search to edit forms.

REPORTS

This menu option directs you to a search/ run reports where you can locate based on status: approved, pending, or rejected. And select show results.

Reports

Filter results

Status:
Pending ▾

Employee Classification:
Empl class - All ▾

Filter based on:
Those created by me or where I'm part of the workflow. ▾

Date Range: Required for **approved** and **rejected** forms only.

From:
Jan ▾ 30 ▾ 2023 📅

To:
Jan ▾ 30 ▾ 2023 📅

Show results

The results will be downloaded to excel / CVS based on your computer setting.   You will find the report in Downloads folder on your computer (This PC -> Downloads).

RESOURCES

This menu option directs you resources you may need when creating New Hire Forms, Changes of Data Forms, and Stipend Forms

MANUALS

Resources

Manuals

HR Portal: Instructions on features of the Human Resources Portal.

HR Portal FAQ: Instructions on features of the Human Resources Portal.

Quick Guide to PeopleSoft Positions: Quick Guide to PeopleSoft Positions.

LINKS FOR PROSPECTIVE EMPLOYEES

Links for Prospective Employees

Criminal Background Check - (link varies)
Departments are required to provide the link to this secure online form to prospective employees. A unique link will be provided by the department head to the individual who has been asked to complete a Criminal Background Check form.

- For **work-study and direct wage employees**, the link is provided by the Career Center.
- For **faculty**, the assistant dean of each college will provide the link.
- For the rest of **staff**, the link is provided by the recruitment area in Human Resources.

The link can only be used for the same position. Do not use the same link for different classifications (for example, use the work-study code for a full-time position, or a clerk position to someone who needs to drive a university vehicle) as each Criminal Background link is related to the type of work the employee is to perform.

I-9 Form - https://secure.i9.talx.com/preauthenticated/LoginCAPTCHA.ascx?Employer=17817
This site will take the prospective employees through the process of filling in their I-9 in a few simple steps. Filling in the form and submitting it to the employer will take only a few minutes. Employees will be able to complete and submit the form from this site. Nothing needs to be printed out or mailed. After form has been submitted, employee will need to stop by the Office of Human Resources and provide proper documentation as mentioned on the I-9 instructions.

FORMS AND OTHER RESOURCES

Forms and Other Resources

Handshake - **www.utrgv.edu/careercenter/handshake**
Job ID for Direct Wage, Work-study or Student Employee Initiative (SEI) job titles is provided on the Handshake website.

Handshake is a database where departments can review student resumes, contact students directly and post job openings for work-studies and direct wages.

If your department does not have a Handshake username and password, it is recommended to contact Career Center to register. Departments should not register directly from the site since it will treat the department as an external entity and have restrict to certain features.

Direct Wage information such as salary ranges, job type and duties such as Tutor Academic Assistant; Student Assistant; Project Associate; or Part-Time Non-Student, can be found on the Handshake website under 'Student Employment (On Campus) & Official Job Descriptions'.

International Student on Campus Employment Authorization Form
The hiring department must complete and route the form to the Office of International Admissions & Student Services along with the student's electronic Personnel Action Form (ePAF).

Project Key Member Update Form
Modify Key Member (such as the manager) of a project number.

SEPARATIONS

This menu option directs you to...

EMPLOYEE SEPARATIONS

PURPOSE

The design of the Separation Process is to assure that all departing employees properly separate from UTRGV and that any university property is cleared before departure from The University of Texas Rio Grande Valley. This procedure applies to all existing university employees regardless of classification. Unlike the New Hire Forms, there will be NO workflow involved. The system will send email notifications to various departments.

Note: If an employee is moving from one department to another or leaving for less than three months, you should use a Change of Job Data instead or hiring proposal via PeopleAdmin.

NAVIGATE TO EMPLOYEE SEPARATION

To begin, click on "Separations" from the HR Portal menu and select "Employee Separations."

Employee

Person of Interest (POI)

SEARCH FOR EMPLOYEE

Type in the complete employee id and/or first name (minimum 3 characters) and/or last name (minimum 3 characters) and press the "Search" button.

Create An Employee Separation Form

The Employee Separation form is designed to assure that all departing employees are separated from employment properly and that any university property is cleared prior to the employee's departure from The University of Texas Rio Grande Valley. This procedure applies to all existing employees of The University of Texas Rio Grande Valley regardless of classification.

Unlike the other forms in the HR Portal, there will be NO workflow involved. Once the Employee Separation form is submitted, it will automatically send email notifications to various departments, as listed in the HR Portal Manual.

⚠ The Employee Separation process should be used only when the employee is leaving the university. If moving from one department to another, or leaving for less than three months, a Change of Job Data form should be used instead.

Lookup Employee Information

Search for employee information to create a **Employee Separation** form.

Employee ID: [   ]

First Name: [   ]

Last Name: [   ]

Search ===>

Select the position in which you want to create a separation.

EMPLOYEE INFORMATION

Under the "Employee Information" section, the employee information will prepopulate most of the fields in the Separation form. If the employee information is not prepopulated, you may complete the section manually.

Employee Information

Last Name: [   ]   First Name: [   ]   Middle Name: [   ]

UTRGV ID#: [   ]   Student or Banner ID#: [   ] * Required for faculty and student-employees.

Email: [   ]

POSITION INFORMATION

The position information should already be pre-populated.

Position Information

Position Number: [ ]

Employee Classification: [ ]

Job Code/Title: [ ] [ ]

Division: [ ] [ ]

Department: [ ] [ ]

SUPERVISOR INFORMATION

The Supervisor information should already be pre-populated.

Supervisor Information

Supervisor Name - Last: [ ] First: [ ]

Employee ID: [ ] Sup email: [ ]

INTERNATIONAL EMPLOYEE AND/OR GRAND-FUNDED POSITION

If the employee is on a sponsorship Visa, select "Yes" and specify the type of Visa the employee is working under. Otherwise, select "No" and leave the Sponsorship field as "None." This is to notify the International Office via email of the employee separation.

Select if the employee is under a grant-funded position. This is to notify Grants & Contracts.

International Employee and/or Grant Funded position

Is employee working with a UTRGV sponsorship VISA? ○ Yes ○ No

If yes, type of UTRGV sponsorship VISA this employee was working with: [None ⌄]

Is this a grant funded position? ○ Yes ○ No

EMPLOYEE SEPARATION INFORMATION

Use the dropdown arrows to select the last physical work date. This is defined as the last actual physical working date in the institution.

Using the dropdown arrows, select the Separation date. This is defined as the last official day of employment.

For example, if the last day of an employee is on March 19, but he will use full-time vacation on the last three days of work (March 17-19), then his last physical work date will be March 17 and his separation date will be on March 19.

Employee Separation Information

Last physical work date: [⌄] [⌄] [⌄] Separation date: [⌄] [⌄] [⌄]

Reason for Employee Separation:

[⌄]

Note: For voluntary separation (v), supervisor will need to submit a scanned copy of the letter of resignation to the Office of Human Resources at HR@utrgv.edu.

Reasons for Employee Separations

Select the reason why the employee is separating from the institution. The list of reasons is categorized as voluntary and involuntary.

VOLUNTARY	INVOLUNTARY
DISSATISFIED WITH THE TYPE OF WORK	• CONDUCT
• FAILURE TO RETURN TO WORK FROM LEAVE	• DECEASED
• JOB ABANDONMENT	• END OF ASSIGNMENT
• OTHER UT INSTITUTION	• GROSS MISCONDUCT
• SEPARATION INCENTIVE PROGRAM	• LOSS OF [EMPLOYMENT] ELIGIBILITY
• RETIREMENT	• PERFORMANCE
• TRANSFER TO A DIFFERENT STATE AGENCY	• PROBATION PERIOD
• RESIGNED: BETTER OPPORTUNITY	• REDUCTION IN FORCE
• RESIGNED: BETTER PAY/BENEFITS	• TERMINATION OF ELECTED BENEFITS
• RESIGNED: JOB DISSATISFACTION	• VIOLATION OF RULE OR LAW
• RESIGNED: RELOCATION	
• RESIGNED: IN LIEU OF TERMINATION	
• RESIGNED: PERSONAL REASONS NOT RELATED TO THE JOB	
• RESIGNED: NON-REHIRED SETTLEMENT AGREEMENT	

ⓘ *Note: For voluntary separation (v), the supervisor will need to send a scanned copy of the letter of resignation to the Office of Human Resources at HR@utrgv.edu.*

SUPERVISOR CHECKLIST FOR EMPLOYEE SEPARATION

Supervisors have the responsibility to properly exit an employee. The checklist included in the form will function as a guide to ensure pending items are completed or returned before the issuance of the employee's final paycheck.

Checklist

As supervisor, it is your responsibility to properly exit an employee. The checklist below will act as guide to ensure pending items are completed or returned prior to the issuance of the employee's final pay check.

Note: Supervisors may complete this checklist at a later time from the 'View employee separation' option.

Yes	N/A	
○	○	Inform employee to submit **final timecard** through Time Entry function in PeopleSoft.
○	○	Collect **university equipment** such as ipad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution, and keep inventory.
○	○	Collect **procurement card** and/or **travel cards**, if any, and forward them to the Purchasing Office.
○	○	Inform employee to submit **keys** to the Facilities Operations Department (this includes vehicles keys or keys to any other facility or equipment).
○	○	Collect **employee id card** and submit to V One Card Services in Brownsville at Campus Bookstore and in Edinburg at ESTUN 2.310.
○	○	Collect **employee access card** (if any) and submit to the UTRGV University Police Department.
○	○	Inform the employee to contact Parking and Transportation for any pending **parking fines** and **parking permit fees** including possible refunds upon the return of their **permit**.
○	○	Inform the employee to contact the **Office of Human Resources** to facilitate separation.
○	○	Inform the employee to contact the **university library** for any pending fees/checked out items.
○	○	As a reminder, if employee is a Project Manager (Grants), please contact Grants Accountant. If employee is a cost center manager, please submit a new UTRGV Cost Center Key Member Update via PeopleSoft with the name of the new employee responsible for the Cost Center number(s).

SUBMIT FORM

Click on the continue button to have the system verify the Separation form for any missing data. After review, scroll down to the bottom of the page and send. The email notifications will be sent to several departments so that they can take the proper action from their side.

There are at least three different emails notifications sent out:

Email to Employee Separating: If the employee is a full-time employee, depending on their employee classification, they will receive an email with a link to complete the exit form and a list of the supervisor checklist.

Email to departments: This includes assistant deans, Grants and Contracts, and International Office if required from the form. The creator of the form also receives the notification along with the manager.

Email to Supervisor: Same as the email to the department, except that it also includes the checklist for reference purposes.

POI SEPARATION

PURPOSE

The design of the Separation Process is to assure that all departing Persons of Interest (POI) are properly separate from UTRGV and that any university property is cleared before departure from The University of Texas Rio Grande Valley. This procedure applies to all existing POIs regardless of classification. Unlike the New Hire Forms, there will be NO workflow involved. The system will send email notifications to various departments.

Note: A separation for POI must be submitted as soon as the supervisor is aware that the POI will no longer be affiliated with UTRGV.

NAVIGATE TO POI SEPARATION

To begin, click on "Separations" from the HR Portal menu and select "POI."

Type in the complete employee id and/or first name (minimum 3 characters) and/or last name (minimum 3 characters) and press the "Continue" button.

SEARCH FOR POI

Type in the complete employee id and/or first name (minimum three characters) and/or last name (minimum 3 characters) and press the "Search" button.

POI INFORMATION

For a POI Separation, enter all required information (name, UTRGV ID, and email).

Person Of Interest Information

Last Name: [   ]   First Name: [   ]   Middle Name: [   ]

UTRGV ID#: [   ]

Email: [   ]

DEPARTMENT INFORMATION

The department information should already be prepopulated, but if entered manually or need to be updated, click on the "Search Department" to select the department that corresponds to the POI.

Department Information

Note: Box must be checked in order to update once you submit the form.

[Search Department]

Division: [   ] [   ]

Department: [   ] [   ]

SUPERVISOR INFORMATION

The Supervisor information should already be prepopulated, but if it is blank or needs to be entered manually, click on the "Search Employee" button to update.

Supervisor Information

If supervisor is a UTRGV employee, you may search for their information to auto-populate data. Otherwise, please enter in the blank fields below.

Supervisor: [Search Employee]

Supervisor Name: Last: [   ]   First: [   ]

UTRGV ID: [   ]   Sup email: [   ]

POI SEPARATION INFORMATION

Using the dropdown arrows, select the Separation date.

This is defined as the last official day of employment. For example, if the last day of an employee is on March 19, but he will use full-time vacation on the last three days of work (March 17-19), then his last physical work date will be March 17 and his separation date will be on March 19. The separation for POI only requires a Separation Date.

POI Separation Information

Separation date:

CHECKLIST

As a supervisor, it is your responsibility to properly exit a POI. The checklist below will act as a guide to ensure pending items are completed or returned to The University of Texas Rio Grande Valley.

Note: Supervisors may complete this checklist at a later time from the 'View' option.

Checklist

As supervisor, it is your responsibility to properly exit a POI. The checklist below will act as a guide to ensure pending items are completed or returned to The University of Texas Rio Grande Valley.

Note: Supervisors may complete this checklist at a later time from the 'View POI separation' option.

Yes	N/A	
○	○	Collect **university equipment** such as ipad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution, and keep inventory.
○	○	Inform POI to submit **keys** to the Facilities Operations Department (this includes vehicles keys or keys to any other facility or equipment).
○	○	Collect **POI id card** and submit to V One Card Services in Brownsville at Campus Bookstore and in Edinburg at ESTUN 2.310.
○	○	Collect **POI access card** (if any) and submit to the UTRGV University Police Department.
○	○	Inform POI to contact Parking and Transportation for any pending **parking fines** and **parking permit fees** including possible refunds upon the return of their **permit**.
○	○	Inform POI to contact the **university library** for any pending fees/checked out items.

SUBMIT FORM

Click on the continue button to have the system verify the Separation form for any missing data. After review, scroll down to the bottom of the page and send. The email notifications will be sent to several departments so that they can take the proper action from their side.

There are at least two different emails notifications sent out:

Email to departments: This includes assistant deans, Grants and Contracts, and International Office if required from the form. The creator of the form also receives the notification along with the manager.

Email to Supervisor: Same as the email to the department, except that it also includes the checklist for reference purposes.
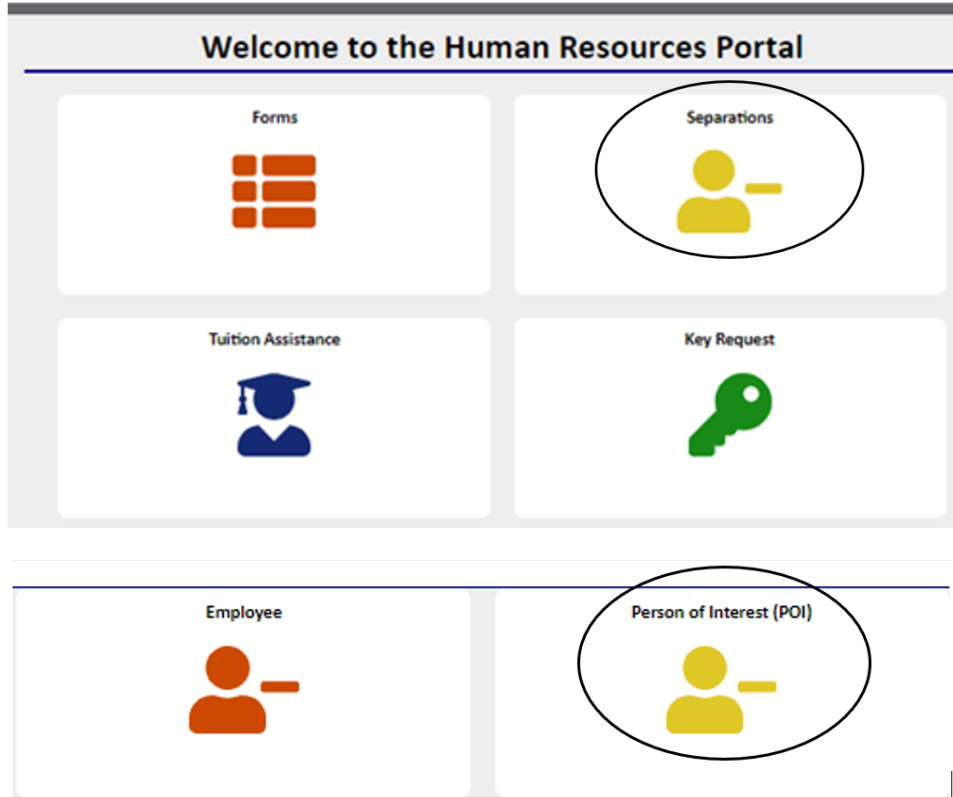
EMPLOYEE CLASSIFICATIONS

Code	Description	Assigned Job Codes
AP	Admin. & Professional Staff	Varies
APN	AP Wages Acct	10997: Special Assign Faculty, 10999: Special Assign Staff
CL	Classified Staff	Varies (exempt and non-exempt staff)
CLN	Classified Staff Wages	10061: PT Non-Stdt, 10995: Spec Assign, 10998: Temp Spec Assign
FA1	Faculty Tenure	Varies
FA2	Faculty Non-Tenure	Varies
FA3	Faculty Summer	Varies
FA4	Faculty SOM –12 months	Varies
RES	Resident (School of Medicine)	10149: Chief Res, 10150: Res PGY 1, 1051: Res PGY 2, 1052: Res PGY 3, 10153: Res PGY 4, 10154: Res PGY 5
GRA	Graduate Research Assistant	10064: Asst Instr, 10081: Res Asst WS, 10082: Grad Asst WS, 10095: Res Asst, 10096: Grad Asst
GTA	Graduate Teaching Assistant	10047: Teaching Assistant, 10080: Teach Asst WS
STU	Students	10056: Temp Stdt, 10057: Stdt Acad Tutor, 10058: Stdt Acad Asst, 10059: Stdt Asst, 10060: Stdt Proj Assc, 10065: SEI, 10094: AmeriCorp
WS	College Work-Study	10039: Grad Stdt Ws, 10051: WS Stdt Aca Tutor, 10053: WS Stdt Aca Assist, 10054: WS Stdt Asst, 10055: WS Stdt Proj Assoc

EMPLOYEE CLASSIFICATIONS FOR STAFF

The staff classification refers to a position such as exempt staff, direct wage, and work-study. Staff Classifications for New Hire Forms and Changes of Job Data Forms:

- Administrative and Professional Staff
- College Work-Study
- Direct Wage (student employee)
- Exempt Regular
- Non-Exempt Regular
- Student Employment Initiative (SEI)
- Temporary Non- Exempt Staff
- Temporary Student

DIRECT WAGE/STUDENT EMPLOYMENT INITIATIVE/WORK-STUDY/TEMPORARY STUDENT/PART-TIME NON-STUDENT

DIRECT WAGE

A candidate for this position should have less than or equal to 19 hours weekly. These classifications require a Career Posting Number (Job ID), which is provided on the Handshake website. A link to the Handshake website is found in the Link section of the Resources menu of the HR Portal.

> 📌 **Any direct wage position with an hourly rate of $13 or above** will need to go through an approval process with HR Compensation. To ensure any hourly rates discussed with a temporary worker are suitable, start this conversation throughout the posting process.

STUDENT EMPLOYMENT INITIATIVE (SEI)

To speed up the approval process for SEIs, it is recommended for students upload the following documentation to their Career Connection profile before the New Hire Form is created:

- Resume
- Class Schedule (for the semester they are applying)
- Unofficial Transcript

COLLEGE WORK-STUDY EMPLOYEES (WS)

This position applies to students who can work as College Work-Study for Fall, Spring, and/or Summer as approved by the Financial Aid Office. If hired in the summer, the student must be enrolled for a total of six hours or more for the summer and may only work during the summer semester enrolled as a student. The May session is considered part of Summer I.

> 📝 **Example: College Work-study Employee for Summer Sessions**
>
> - If a student is enrolled 4 hours for Summer I and 3 hours for Summer II, the student will qualify to work all summer as work-study since the total hours is more than 6.
> - If a student is only enrolled for Summer II, then the total hours enrolled should be at least 6 and may only work as work-study for Summer II.
> - If an employee is enrolled 2 hours for the May session and 4 hours for Summer I, the student may qualify to work for Summer I as a work-study since the total hours are at least 6.

TEMPORARY STUDENT

A student employee hired as a Temporary Student can work up to 40 hours only during the summer period (May 1 – August 31) and must not be taking courses concurrently during the period of assignment. For example, if Jane Doe is not taking courses in May but will be taking summer courses beginning June 4th, Jane can only have the assignment of Temporary Student on or after May 1st and up to June 3rd. After that, she would need to be changed into a student-employee position that does not exceed 19 hours per week.

PART-TIME NON-STUDENT

Part-time jobs that do not require a bachelor's degree or are for clerical duties must be performed by students enrolled during the period of assignment. Only part-time jobs that require specific skills and/or education can be performed by non-students. Part-time non-student employees cannot work more than 19 hours per week and the department must provide a reason for hiring a non-student for the part-time position.

Example: Part-Time Job for Students and Non-Students

Required to be performed by students	Acceptable for non-students

• Clerical duties such as:
  o Help the front desk
  o Answer office phone calls
  o To file or enter data
  o Maintain and reconcile ledgers
  o Create reports
	• Technical IT work that requires system knowledge
	• Special project administration such as:
	  o Interpreter
	  o Counseling and advising

TEMPORARY NON-EXEMPT STAFF

An employee hired as Temporary Non-Exempt Staff can work between 20 to 40 hours for up to 90 days (if direct wage with no benefits) or 4 ½ months (if direct wage with benefits). After reaching the limit, the employee must wait 13 months from the last day they worked as Temporary Non-Exempt staff to reapply for that classification/job code description again. Under a different title, the individual could work up to 19 hours each week. Please contact Salary Administration for hiring recommendations or contact HR-Compensation to discuss establishing a permanent position if any further time is required after completing either the 3 or 4 ½ months.

Example: Temporary Non-Exempt Staff

Suppose John Smith worked as Temporary Non-Exempt Direct Wage (with no benefits) from January 1 – January 31st. Then he worked again from April 1 – April 30. That is already two months' worth. Then he worked from June 1 to June 30. That completes the three months of work.

This means that if he wants to work again as a Temporary Non-Exempt, he will have to wait 13 months since his last day on June 30, which would fall any time after August 1st of the following year.

WORKFLOW

The following workflows apply to all New Hire Forms, Changes of Job Data Forms, and Stipends

Faculty and Graduate Assistantship Workflow		Hiring Official	Reviewer	Manager	International Admission^	Graduate Office	Grants & Contracts^^	Financial Aid	Assistant Dean	Vice President	Academic Affairs~	Position Control	Human Resources
FA1	Academic Affairs		-		-		-		✔		✔	✔	✔
	Health Affairs	✔	-	✔	-		-		✔			✔	✔
	School of Medicine	✔	-	✔	-		-			✔ *		✔	✔
FA2	Academic Affairs		-		-		-		✔		✔	✔	✔
	Health Affairs	✔	-	✔	-		-		✔			✔	✔
	School of Medicine	✔	-	✔	-		-			✔ *		✔	✔
FA3	Academic Affairs		-		-		-		✔		✔	✔	✔
	Health Affairs	✔	-	✔	-		-		✔			✔	✔
	School of Medicine	✔	-	✔	-		-			✔ *		✔	✔
FA4	School of Medicine	✔	-	✔	-		-			✔ *	✔	✔	✔
APN	10997: Special Assignment Faculty	✔	-	✔	-		-		✔		✔	✔	✔
RES	School of Medicine		-	✔	-		-			✔ *	✔		✔
GRA	10064: Assistant Instructor***		-			✔	-		✔ ^				✔
	10081: Research Assistant WS		-			✔	-	✔	✔ ^				✔
	10082: Graduate Assistant WS		-			✔	-	✔	✔ ^				✔
	10095: Res. Assist, 10096: Grad. Assist.		-			✔	-		✔ ^				✔
GTA	10080: Teachnig Assistant WS					✔		✔	✔ ^				✔
	10047: Graduate Teaching Assistant		-			✔	-		✔ ^				✔

Legend (table header key):
- FA1: Faculty Tenure
- FA2: Faculty Non-Tenure
- FA3: Faculty Summer
- FA4: Faculty (12 mos)
- APN: Special Assignment Faculty
- RES: Residents
- GRA: Graduate Assistantship
- GTA: Graduate Teaching Assistant

*VP for School of Medicine.   ~Previously role for Provost   ***If Graduate Assistantship, Vice President is included.
^Excludes Assistant Dean approval in Academic Affairs.

Faculty/Graduate Assistantship Workflow:

1. **Hiring Official:** This is the person responsible for the college or department.
2. **Manager Reviewer (optional):** A department may add a reviewer of their choice to approve before the manager.
3. **Manager:** Is the Project Manager based on the cost center or project used in the New Hire Form
4. **^International Admission and Student Services:** For Students with an F1 Visa, the International Admissions and Student Services office will be included in the workflow. For a J1 Visa, the International Program & Partnerships office will be included in the workflow. For Resident positions with a J1 Visa, the Graduate Medical Education office will review the workflow. For all other staff positions, the Immigration Services Manager will be included in the workflow.

5. **Graduate Office:** If the Graduate Assistantship and total enrolled hours (academic) are less than 9 (for fall and spring) or less than 6 hours (for summer) and the student is not graduating, a justification will be needed, with the Graduate Office being included for approval.

6. **^^Grants and Contracts:** The Grants and Contracts office is included in the workflow when the budget is from a grant or cost-share. For cost centers with funding 5500 or 5600 as restricted accounts, Grants Accounting will be included in the workflow instead.

7. **Assistant Deans:** Assistant deans are included for faculty and graduate assistantship positions. They are added automatically based on the college selected.

8. **Vice President:** Vice Presidents are included in the workflow for all faculty positions.
   ***If it is a Graduate Assistantship, the Vice President is included only for "10064-Assistantship Instructor".

9. **Academic Affairs:** This was previously the role of the Provost.

10. **Position Control:** Included in faculty positions and only where there is a change to Graduate Assistantships.

11. **Human Resources:** Once reviewed and approved by HR, an email notification is sent out to the creator, manager, and supervisor of the New Hire Form to let them know that the employee is cleared and may begin employment on the date specified by HR (if different than proposed).

Student and Staff Workflow		Reviewer	Manager	International Admission^	Financial Aid	Grants & Contracts^^	Student Employment	Vice President~	Compensation Office	Position Control	Human Resources
AP	**Administrative & Professional Staff**	-	✔	-		-		✔	✔ +	✔	✔
APN	*10999: Special Assignment A&P*	-	✔	-		-			✔ +	✔	✔
CL	**Classified Staff**	-	✔	-		-			✔ +	✔	✔
CLN	*10995: Special Assignment Classified Staff*	-	✔	-		-			✔ +	✔	✔
	*10998: Temp Staff Assignment *	-	✔	-		-			✔ +	✔	✔
	*10061: Part-Time Non-Student (Academic Affairs)**	-	✔	-		-	✔				✔
	*10061: Part-Time Non-Student ***	-	✔	-		-	✔	✔			✔
STU	**10065: Student Employment Initiative (SEI)***	-	✔	-		-	✔				✔
	10094: AmeriCorps*	-	✔	-	✔	-					✔
	Other*	-	✔	-		-	✔				✔
WS	**College Work-Study***	-	✔	-	✔	-	✔				✔

^International Admission and Student Services, International Program & Partnerships, Graduate Medical Education, Immigration Services Manager – For international or VISA employees.

^^Grants and Contracts Office – when budget from a grant or cost-share is used.

* Up to 4 ½ months with 20 – 40 hours per week.

** Up to 19 hours per week.

*** Position Control will be included in workflow if there is a change to the position.

~ Excludes VP Academic Affairs.

✔ + For stipends with staff positions and where the primary assignment of employee is non-faculty.

LOGGING IN AFTER TIMEOUT

The system will time out after 20 minutes of inactivity. When this happens, click on the banner at top of the page and re-enter your credentials. After that, you may close the pop-up screen and continue working where you left off. This prevents the loss of data that has been entered.

REQUESTING ACCESS TO THE HR PORTAL

How to access or view the HR Portal?

By default, all UTRGV full-time employees should automatically have access to the HR Portal. For new hires, once they are active in the PeopleSoft system, they will get access the next business day.

CREATING A GET ACCESS REQUEST

When requesting a special access/role, you must create a "Get Access" ticket in the UTRGV Support Center. For more information on how to create a Get Access request, please visit Get Access.

Remember, when trying to access the HR Portal outside of any of our campuses, you will require to use a Virtual Private Network (VPN) connection. For more information on how to use VPN, please visit www.utrgv.edu/it/software/virtual-private-network

TROUBLESHOOTING

THE FORM DOES NOT DISPLAY WHEN TRYING TO VIEW OR APPROVE

This happens on certain browsers such as Safari for mobile devices. Using another browser such as Firefox or Chrome should be able to fix this issue.

Clearing the Cache on your browser will help as well.

TOOLS

RATE CALCULATOR

Although not required in the HR Portal but requested by popular demand, a Rate Calculator is available in the Proposed Cost Center section of the HR Portal for departmental use. To access it, click on the "Open Rate Calculator" button found on the top-right side.

Proposed Cost Center

Enter the cost center number(s) of the corresponding source(s) of funding.

Open Rate Calculator

The calculator will open in a new window.

Enter the date range, hours per week, rate of pay, and percentage of funding source, and press "Calculate."

The results will provide the total number of days in weeks and the total amount. Please note that the results are just an estimate since it does not exclude holidays and absences during the date range.

BRIEF DESCRIPTION EXAMPLES

The following are examples of what to include in the Brief Description box for Changes in Job Data Forms or Stipends in the HR Portal.

SCENARIOS

1 REDUCING THE EMPLOYEES' HOURS

Example of Brief Description:

This Change of Job Data Form is to reduce the employee's hours per week from 19 to 10 hours per week from 6/15/2023 to 7/31/2023.

2 CHANGING THE EMPLOYEE'S CLASSIFICATION

Example of Brief Description:

Note: This will require a different position number.

This Change of Job Data Form is to change the employee's classification from Work-Study to Student Employee. The employee ran out of Work-Study funds and will be changed to Student Employee funds effective 5/4/2023 and until the remainder of the assignment.

3 ADDING ASSIGNMENT

Example of Brief Description:

This Change of Job Data Form is to add a secondary assignment. This employee is currently working at [department name] with 9 hrs. per week and will be starting the secondary assignment at [department name] with 10 hrs. per week from 6/01/2023 to 8/31/2023.

4 CREATING A SPECIAL ASSIGNMENT FOR A STAFF EMPLOYEE

Example of Brief Description:

This stipend is to cover additional shifts worked at Knap Hospital for the month of April 2023 for the total amount of $XXX. XX. If grant-funded, include in the description how this assignment is justifiable to the grant.

Example of Brief Description:

This stipend is for [mentorship/ workshops/ fellowships, etc.] for the Spring semester. The stipend total amount is $XXX. XX. If grant-funded, include in the description how this assignment is justifiable to the grant.

5 CREATING A SPECIAL ASSIGNMENT FOR A FACULTY EMPLOYEE

Example of Brief Description:
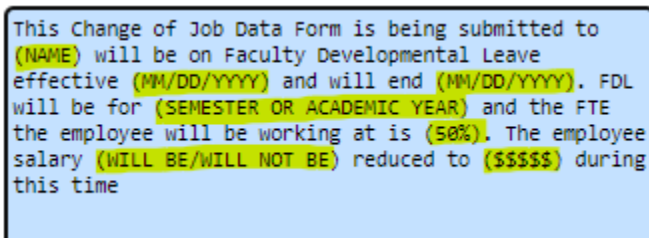
This stipend is to cover faculty working on [overload, Chair, Director, workshop, etc.] for a monthly amount of $2,000 ($4,000 total) from April 2023 through May 2023.

If grant funded, include in the description how this assignment is justifiable to the grant.

6 FACULTY DEVELOPMENT LEAVE

The Brief Description information section is especially important for Human Resources, this is needed so that we understand what needs to be updated on the employee job record. We highly recommend using the wording below when submitting Changes of Job Data forms for FDL employees. Note that only highlighted in yellow is where information will be changing.

Example of Brief Description:

This Change of Job Data Form is being submitted to (NAME) will be on Faculty Developmental Leave effective (MM/DD/YYYY) and will end (MM/DD/YYYY). FDL will be for (SEMESTER OR ACADEMIC YEAR) and the FTE the employee will be working at is (50%). The employee salary (WILL BE/WILL NOT BE) reduced to ($$$$$) during this time

7 CHANGES IN FUNDING

Example of Brief Description:

Note: If the current funding does not cover the entire fiscal year, please submit another Change of Job Data.

This Change of Funding Form is only to change the cost centers in which the employee is being paid out. The funding change is from 5/4/2023 through 6/30/2023. If grant-funded, include in the description how this assignment is justifiable to the grant.

8 STIPENDS ARE BEING SUBMITTED TO CHANGE A FACULTY OVERLOAD AMOUNT

Example of Brief Description:

This stipend is for the Spring overload on the employee's primary assignment from 01/16/2023 - 05/31/2023. The total added amount is $2,000.00 If grant-funded, include in the description how this assignment is justifiable to the grant.

9 UPDATING THE EMPLOYEE'S CONTRACT AMOUNT

Example of Brief Description:

This Change of Job Data Form is to increase the employee's contract total amount. The employee's initial contract amount was $5,000 from 01/01/2023-05/31/2023, in which the employee received $1,000/month. We are adding $1,000 to the overall contract from 01/01/2023-05/31/2023 so that we may pay the updated total amount of $6,000.

If grant-funded, include in the description how this assignment is justifiable to the grant.

10 ADDING AN EMPLOYEE INCENTIVE

Example of Brief Description:

This stipend is for quarterly incentives for the employee. This payment covers 01/01/2023 - 03/31/2023 for the total amount of $XXX. XX.

Note: An employee incentive should NOT be grant-funded.

GRADUATE ASSISTANTSHIP

11 GRADUATE ASSISTANT (GRA/GTA)

Example of Brief Description:

The student will be assisting with the website and reports needed for the department, which is related to the student's program of study.

Reminder: Duties need to be related to the program of study or professional development.

12 GRADUATE RESEARCH ASSISTANT (GRA/GTA)

Example of Brief Description:

The student is conducting research with the XXXXX program.

13 GRADUATE TEACHING ASSISTANT (GRA/GTA)

Example of Brief Description:

The student will be assisting to teach class ART 3301-07 and ART 3352-01.

14 GRADUATE ASSISTANT OR ASSOCIATE INSTRUCTOR (GRA/GTA)

Example of Brief Description:

The student will be Instructor of Record for the following classes: MGMT 3301-02 and MGMT 3304-05 and holds the necessary 18 graduate credits in a discipline related to the courses assigned.

15 FACULTY SUMMER STIPEND (TENURE OR NON-TENURE) (FA3)

Example of Brief Description:

Faculty (Name) will be working on summer research activities from June thru August. The level of effort will be .333 the total amount to be paid is $XXXX.

(9month salary/3 months in summer = Summer cap * FTE = Stipend amount $8,011.33 (stipend amount)/ $24,033.99 (summer 1/3rd cap) = FTE .333

Note: FTE is required for summer stipends. When providing FTE, please provide at least 3 decimals.

16 FACULTY STIPEND TENURE OR NON-TENURE (FA1 & FA2)

Example of Brief Description:

(Name) will be working as a nurse practitioner, seeing patients, 2 days a week.

16 hours a week @ $50.00/ per hour for 3 months (June – August) 16 hrs. x $50 = $800 $800 x 12 weeks = $9,600

17 FACULTY STIPEND SOM (FA4)

Example of Brief Description:

This stipend is a quarterly incentive based on RVs as per LOO dated 1/24/18. This payment covers 1/1/21 to 3/31/21. The total amount to pay is $XXXX. A spreadsheet Log with detailed information will be forwarded to the Salary Administration email for review.

Note: HR needs a spreadsheet/worksheet to process.

18 FACULTY STIPEND SOM (FA4)

Example of Brief Description:

Faculty (Name) is working additional shifts as a hospitalist to assist the department with 24-hour coverage at Knapp Medical Center. He worked 5-day shifts @ $1380/shift in April. The total amount to pay is $XXXX. A spreadsheet Log with detailed information will be forwarded to the Salary Administration email for review.

Note: HR needs a spreadsheet/worksheet to process.

19 MERIT INCREASE

Example of Brief Description:

This Change of Job Data submission is to increase the employee's salary to $XXXX.XX as the employee has received a merit increase effective 09/01/2023.

If grant-funded, include in the description how this assignment is justifiable to the grant.

20 TEMPORARY ADDITIONAL DUTIES

Example of Brief Description:

This Change of Job Data submission is to temporarily increase the employee's salary to $XXXX.XX from 09/01/2023 to 12/31/2023 as the employee will be performing additional duties.

If grant-funded, include in the description how this assignment is justifiable to the grant.

21 PERMANENT ADDITIONAL DUTIES

Example of Brief Description:

This Change of Job Data submission is to increase the employee's salary to $XXXX.XX as the employee has been given permanent additional duties effective 09/01/2023.

If grant funded, include in the description how this assignment is justifiable to the grant.

22 REMOVING TEMPORARY ADDITIONAL DUTIES

Example of Brief Description:

This Change of Job Data submission is to place the employee's salary back to $XXXX.XX effective 10/1/2023 as the employee is no longer working on the temporary duties.

If grant-funded, include in the description how this assignment is justifiable to the grant.

23 EQUITIES

Example of Brief Description:

This Change of Job Data submission is due to an Equity increase in the employee's salary to $XXXX.XX as per SEA. Equity is effective 9/1/2023.

If grant-funded, include in the description how this assignment is justifiable to the grant.

24 PROMOTIONS

Example of Brief Description:

This Change of Job Data submission is to increase the employee's salary to $XXXXXX. Employee (Name) has been promoted effectively on 09/01/2023.

If grant-funded, include in the description how this assignment is justifiable to the grant.

25 RECLASSIFICATIONS

Example of Brief Description:

This Change of Job Data submission is due to Reclassification and to increase the employee's salary to $XXXXX effective 09/01/2023.

If grant-funded, include in the description how this assignment is justifiable to the grant.

KEY REQUEST

This menu option directs you to create a key request/ access card request for an employee. Key and access card requests for location changes as well as lost, duplicate and/or broken keys will be made through the new HR Portal and will no longer be requested through iShop.

The only key and access card requests that will remain in iShop will be for **restricted areas and for students**.

Key requests for primary office access for new hires, rehires and transfers will be done within the hiring proposal as part of the onboarding process in PeopleAdmin.

They can create up to six requests at a time. It goes through the supervisor's approval.
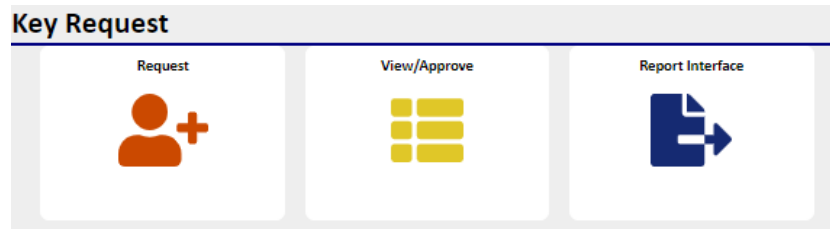
REQUEST

About this form: Please complete the information below to order a key and/or access card.

This form is used to request additional keys or change of keys for individuals not already processed in PeopleAdmin.

Please note: All fields are mandatory.

Key Request

About this form: Please complete the information below to order a key and/or access card.

This form is used to request additional keys or change of keys for individuals not already processed in PeopleAdmin.

Please note: All fields are mandatory.

Lookup Employee Information

Search for employee information to create a **Key Request** form.

Employee ID: [   ]

First Name: [   ]

Last Name: [   ]

[Search ===>]

Employee information should be prepopulated, and information regarding the location of the key request/ access card is needed.

Building 1

Building Code for key or access card: [Search Building 1]

[   ] [   ]

Select what type of request is needed for this building:

☐ Key Request

☐ Access Card Request

[[+] Include another building.]

VIEW/APPROVE

This is the Key Request Dashboard where you can view and approve key/access card requests.

HOW TO GET HELP

If you have any questions regarding

- How to create/process a form?
- Getting access to the HR Portal
- Getting Role Access
- Any correction to the manual

Please reach out to the Office of Human Resources, **HRIS Analyst** at **hr@utrgv.edu**