HUMAN RESOURCES
MANAGEMENT SYSTEM

PeopleSoft
Version 8.9
ePRF

University of Houston System
Training/ Reference Guide
Overview

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

eForms Home Page

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

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

To select the link

1. Click on “Start a New eForm”

2. Click on the appropriate eForm to initiate
Start a New electronic Form (eForm)

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

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

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

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

Return to Electronic Forms (eForms) Home Page

Create a New Position

1. Check “Create a New Position.”

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

Add Position Request (PRF)

Position Search

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

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

To update or inactivate an existing position, click the appropriate checkbox and a position search table will appear. If you know the position number, enter it, and click Search. Otherwise, enter the information you have and click Search.
2. **Enter Effective Date and Department Information:**

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

---

**Add Position Request (PRF)**

**Step 1 of 3: Position Information**

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

<table>
<thead>
<tr>
<th>Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requested Action:</strong> Create a New Position</td>
</tr>
<tr>
<td><strong>Effective Date:</strong> 09/01/2009</td>
</tr>
<tr>
<td><strong>Position Number:</strong> NEW</td>
</tr>
<tr>
<td><strong>Present Job Code/Title:</strong></td>
</tr>
<tr>
<td><strong>Incumbent(s):</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department:</strong> H0058  Dean, Education</td>
</tr>
<tr>
<td><strong>Business Unit:</strong> HR730  U of H Main</td>
</tr>
<tr>
<td><strong>Location Code:</strong> H5023  Education</td>
</tr>
<tr>
<td><strong>Reports To Position:</strong></td>
</tr>
</tbody>
</table>
3. Enter Job Classification Information

Select:
- Reg/Temp – Reg (benefits-eligible), Temp (non-benefits-eligible, insurance-eligible)
- Empl Class

If Reg Position, Select whether to:
- Use Existing Job Code – Enter Proposed Job Code
- Update Existing Job Code – Enter Proposed Job Code and make requested changes to Job Title, Salary Plan, and/or Salary Grade
- Create New Job Code – Enter Proposed Job Title, Salary Plan, and Salary Grade

If Temp Position, Enter Proposed Job Code
Enter Proposed Annual Salary (If applicable)

---

4. Enter Standard Hours/FTE

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

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

---

Click Next
5. Enter Budget Information

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

Add Position Request (PRF)

Step 2 of 3: Budget Information
Complete the fields below with the appropriate budget information that is being requested.

**Position Information**

Requested Action: Create a New Position
Position Number: NEW
Proposed Job Code/Title: D4H4 Coord, Office
Incumbent(s):

**Budget Information**

<table>
<thead>
<tr>
<th>Speedtype(s)</th>
<th>Combination Code(s)</th>
<th>Distrb %%(s)</th>
<th>Funding End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>00730-12106</td>
<td>2080-H0058-D0767-NA</td>
<td>100.000</td>
<td></td>
</tr>
</tbody>
</table>

Distribution % Total: 100.000

Click Next
6. Finalize Form

### Add Position Request (PRF)

**Step 3 of 3: Finalize Form**

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

#### Position Information

**Requested Action:** Create a New Position  
**Position Number:** NEW  
**Proposed Job Code/Title:** D4H4 Coord, Office

#### Incumbent(s):

#### Action(s) & Reason(s)

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Position Change</td>
<td>New Position</td>
</tr>
<tr>
<td>2 Budget Change</td>
<td></td>
</tr>
</tbody>
</table>

#### Attachments

| Description | | Add New Document |
|-------------|----------------|
| View        | Description | File size | Author | Created Date/Time  |
| View        | View        |           |        | 09/20/09 11:59:30AM |

#### Comments

**Your Comment:**

Create new Office Coord position for the College of Education

**Comment History:**

...
Note: If there is a Position Change, the form will route to the Component HR Department for approval. If there is a Budget Change, the form will route to the Component Budget Department and Component Grants & Contracts Department (or equivalent), if applicable.

Note: Once the Component HR Department, Component Budget Department, and Component Grants & Contracts Department (or equivalent) approves the form and it is executed, the initiator will receive an email informing them that the form has been authorized. The form will be available for view with the new position # and approved job classification.

7. View Approved Form

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

**View Position Request (PRF)**

**Step 1 of 2: View Position Request**

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

**Position Information**

- Requested Action: Create a New Position
- Position Number: 01010105
- Incumbent(s): <Vacant>

**New Position Information**

- Effective Date: 09/01/2009
- eForm ID: 67135
- Department: H0058 Dean, Education
- Business Unit: HR730 U of H Main
- Location Code: H5023 Education

**Reports To Position:**
**Proposed:**

**Job Code/Title:** D4H4 Coord, Office  
**Salary Plan:** UHN  
**Salary Grade:** 106  
**Annual Salary:** $30,000.00

**Approved:**

**Job Code/Title:** D4H4 Coord, Office  
**Salary Plan:** UHN  
**Salary Grade:** 106  
**Hiring Range From:** $26,894.40  
**To:** $33,612.80

**New Budget Information**

**Budget Effective Date:** 09/01/2009

<table>
<thead>
<tr>
<th>Speedtype(s)</th>
<th>Combination Code(s)</th>
<th>Distrib %(s)</th>
<th>Funding End Dt</th>
</tr>
</thead>
<tbody>
<tr>
<td>00730-12106</td>
<td>2080-H0050-D0767-NA</td>
<td>100.000</td>
<td></td>
</tr>
</tbody>
</table>

**Distribution % Total:** 100.000

**Action(s) & Reason(s)**

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Position Change</td>
<td>New Position</td>
</tr>
<tr>
<td>2 Budget Change</td>
<td></td>
</tr>
</tbody>
</table>
Update an Existing Position

1. Check “Update an Existing Position.”

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

Add Position Request (PRF)

Position Search

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

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

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

Search Fields

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

Existing Position Search

Position Number:  
Department:  
Job Code:  
Job Title:  

Search  |  Clear  |  Cancel

2. Select position # from Position Result.

Position Result

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Department</th>
<th>Job Code</th>
<th>Job Title</th>
<th>Incumbents</th>
</tr>
</thead>
<tbody>
<tr>
<td>00011542</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary 1</td>
<td></td>
</tr>
<tr>
<td>00104081</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary 1</td>
<td></td>
</tr>
<tr>
<td>00109103</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary 1</td>
<td>&lt;Vacant&gt;</td>
</tr>
<tr>
<td>00109638</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary 1</td>
<td>&lt;Vacant&gt;</td>
</tr>
</tbody>
</table>
3. Enter Effective Date and Department Information:

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

Add Position Request (PRF)

Step 1 of 3: Position Information

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

Position Information

Requested Action: Update Existing Position          eForm ID: 67166
Effective Date: 09/01/2009  Position Data
Position Number: 00109103
Present Job Code/Title: D4F6 Secretary 1
Incumbent(s): <Vacant>

Department Information

Department: H0098 Dean, Law
Business Unit: HR730 U of H Main
Location Code: H6060 University of Law of Center
Reports To Position:
4. Enter Job Classification Information

If Reg Position, Select:

- Empl Class

Current Job Classification Information will populate from position data
Select whether to:

- Use Existing Job Code – Enter Proposed Job Code
- Update Existing Job Code – Enter Proposed Job Code and make requested changes to Job Title, Salary Plan, and/or Salary Grade
- Create New Job Code – Enter Proposed Job Title, Salary Plan, and Salary Grade
- No Change (default) – If no change to job classification is requested

Enter Proposed Annual Salary (If applicable)
Select Requested Position Change Reason

---

**Job Classification Information**

Reg/Temp: Regular

Empl Class: Support Staff

- Use Existing Job Code
- Update Existing Job Code
- Create New Job Code
- No Change

Current:

- Job Code/Title: D4F6 Secretary 1
- Salary Plan: UHN
- Salary Grade: 105
- Annual Salary: 

Proposed:

- Job Code/Title: D4F6 Secretary 2
- Salary Plan: UHN
- Salary Grade: 106
- Annual Salary: $30,000.00

**Position Change Reason**

Action: Position Change
Reason: Job Re-Classification

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5. Enter Standard Hours/FTE

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

**Standard Hours/FTE**

- Standard Hours: 40.00
- FTE: 1.00

Click Next
6. **Enter Budget Information**

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

---

**Add Position Request (PRF)**

**Step 2 of 3: Budget Information**

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

### Position Information

- **Requested Action:** Update Existing Position
- **eForm ID:** 67185
- **Position Number:** 00109103
- **Proposed Job Code/Title:** D4F5 Secretary 2
- **Incumbent(s):** <Vacant>

### Budget Information

<table>
<thead>
<tr>
<th>Speedtype(s)</th>
<th>Combination Code(s)</th>
<th>Distrb %s</th>
<th>Funding End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>00730-10682</td>
<td>2063-H0099-E0273-NA</td>
<td>100.000</td>
<td></td>
</tr>
</tbody>
</table>

**Distribution % Total:** 100.000

Click Next
7. Finalize Form

Add Position Request (PRF)

Step 3 of 3: Finalize Form

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

Position Information

**Requested Action:** Update Existing Position  
**Position Number:** 00109103  
**Proposed Job Code/Title:** D4F5 Secretary 2  
**Incumbent(s):** <Vacant>

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Position Change</td>
<td>Job Re-Classification</td>
</tr>
<tr>
<td>2 Budget Change</td>
<td></td>
</tr>
</tbody>
</table>

Attachments

<table>
<thead>
<tr>
<th>Description</th>
<th>Add New Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td></td>
</tr>
</tbody>
</table>

09/28/09 1:25:09PM

Comments

**Your Comment:**  
Reclassify vacant position from a Secretary 1 to a Secretary 2

Comment History:

<< Previous  Hold  Submit
Note: If there is a position change, the form will route to the Component HR Department for approval. If there is a Budget Change, the form will route to the Component Budget Department and Component Grants & Contracts Department (or equivalent), if applicable.

Note: Once the Component HR Department, Component Budget Department, and/or Component Grants & Contracts Department (or equivalent) approves the form and it is executed, the initiator will receive an email informing them that the form has been authorized. The form will be available for view with the approved job classification and budget effective date.

8. View Approved Form

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

View Position Request (PRF)

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

<table>
<thead>
<tr>
<th>Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Action: Update Existing Position</td>
</tr>
<tr>
<td>Position Number: 0109103</td>
</tr>
<tr>
<td>Incumbent(s): &lt;Vacant&gt;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Position Information</th>
<th>Current Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date: 09/01/2009</td>
<td>Effective Date: 09/01/2009</td>
</tr>
<tr>
<td>Department: H0098 Dean, Law</td>
<td>Department: H0098 Dean, Law</td>
</tr>
<tr>
<td>Business Unit: HR730 U of H Main</td>
<td>Business Unit: HR730 U of H Main</td>
</tr>
<tr>
<td>Location Code: H6060 University of Law of Center</td>
<td>Location Code: H6060 University of Law of Center</td>
</tr>
<tr>
<td>Reports To Position:</td>
<td>Reports To Position:</td>
</tr>
<tr>
<td>Reg/Temp: Regular</td>
<td>Reg/Temp: Regular</td>
</tr>
<tr>
<td>Emp Class: Support Staff</td>
<td>Emp Class: Support Staff</td>
</tr>
</tbody>
</table>

- Use Existing Job Code
- Update Existing Job Code
- Create New Job Code
- No Change

**Current:**
- Job Code/Title: D4F6 Secretary 1
- Salary Plan: UHN
- Salary Grade: 106
- Annual Salary:

**Proposed:**
- Job Code/Title: D4F5 Secretary 2
- Salary Plan: UHN
- Salary Grade: 106
- Annual Salary: $30,

**Approved:**
- Job Code/Title: D4F5 Secretary 2
- Salary Plan: UHN
- Salary Grade: 106

- Hiring Range: From: $26,094.40 To: $33,612.80
- Standard Hours: 40.00 FTE: 1.00
- Standard Hours: 40.00 FTE: 0.00
Inactivate an Existing Position

1. Check “Inactivate an Existing Position.”

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

Add Position Request (PRF)

Position Search

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

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

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

Search Fields

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

Existing Position Search

Position Number:  
Department:  H0098
Job Code:  D4F6
Job Title:  
Search  Clear  Cancel
2. Select position # from Position Result.

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Department</th>
<th>Job Code</th>
<th>Job Title</th>
<th>Incumbents</th>
</tr>
</thead>
<tbody>
<tr>
<td>00111542</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary1</td>
<td></td>
</tr>
<tr>
<td>00104081</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary1</td>
<td></td>
</tr>
<tr>
<td>00109103</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary1</td>
<td>&lt;Vacant&gt;</td>
</tr>
<tr>
<td>00109638</td>
<td>H0098</td>
<td>D4F6</td>
<td>Secretary1</td>
<td>&lt;Vacant&gt;</td>
</tr>
</tbody>
</table>

3. Enter Effective Date:

   Effective Date (Must be within current fiscal year or within fiscal year available for budget entry)
   Position Information will populate from position data. No entry is required.

---

### Add Position Request (PRF)

**Step 1 of 3: Position Information**

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

**Position Information**

- Requested Action: Inactivate Existing Position
- Effective Date: 09/01/2009
- Position Number: 00109638
- Present Job Code/Title: D4F6 Secretary1
- Incumbent(s): <Vacant>

**Department Information**

- Department: H0098 Dean, Law
- Business Unit: HR730 U of H Main
- Location Code: H6060 University of Law of Center
- Reports To Position:
4. Budget Information

Budget Information will populate from department budget table. No entry is required.

Add Position Request (PRF)

Step 2 of 3: Budget Information

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

Position Information

Requested Action: Inactivate Existing Position
Position Number: 00109638
Proposed Job Code/Title:
Incumbent(s): <Vacant>

Budget Information

<table>
<thead>
<tr>
<th>Speedtype(s)</th>
<th>Combination Code(s)</th>
<th>Distrib %</th>
<th>Funding End Date</th>
</tr>
</thead>
</table>

Distribution % Total:
5. Finalize Form

Add Position Request (PRF)

Step 3 of 3: Finalize Form

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

Position Information

Requested Action: Inactivate Existing Position
Position Number: 00109638
Proposed Job Code/Title:
Incumbent(s): <Vacant>

Action(s) & Reason(s)

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Position Change</td>
<td>Position Inactivated</td>
</tr>
</tbody>
</table>

Attachments

<table>
<thead>
<tr>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

Added Date/Time: 09/28/09 2:28:44PM

Comments

Your Comment:

Comment History:

Submit this form? (24642,112)

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

Yes    No
Update, Evaluate, and View an ePRF:

ePRF Forms can be updated through Resubmit, Change, or Withdraw an eForm, and are approved by the appropriate department approvers through their Worklist.

ePRF Forms can be viewed through View an eForm, 30 days from the date initiated, and through Look up an Archived eForm, after 30 days.