

Human Resources Liaison Meeting

Office of Talent & Innovation

May 2, 2024



The University of
Texas System

Agenda

- ❖ Welcome
- ❖ Welcome New HR Liaisons
- ❖ Budgeting Process
- ❖ PeopleSoft Updates
- ❖ Performance Appraisals
- ❖ HR Liaison Manual
- ❖ Wellness/Benefits
- ❖ Cultivate
- ❖ Roundtable/Questions



OTI Team

Human Resources Team



Stephanie Gil
Assistant Director, Talent



Michelle Polkinghorn
Talent Management Specialist



John Feeny
Compensation Manager



Manon Goulet
Talent Management Specialist



Siria Barrera
Sr. HR Business Partner



Gina Arevalo
Benefits & Wellness Program Coordinator



Lesley Ducran
HR Supervisor



Ayesha Haque
Human Resources Representative



Johnny Reyes
Sr. HR Business Partner



Robert Crozier
Compensation Specialist

Leader



Julie Goonewardene
*Sr. Advisor to the Chancellor,
Chief Talent & Innovation Officer*

Innovation Team



Gus Johnson
Assistant Director, Horizon Fund



Susan Masson
Asst. Director of Talent & Innovation Programs



Josh Seils
Talent Program Manager



Abby Pollard
Innovation Program Manager

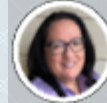
Operations Team



Mary Zimmerman
Operations Program Manager



Susan Onion
Sr. Administrative Associate



Cristina Galvan
Sr. Administrative Associate



Sherri Prince
Sr. Administrative Associate

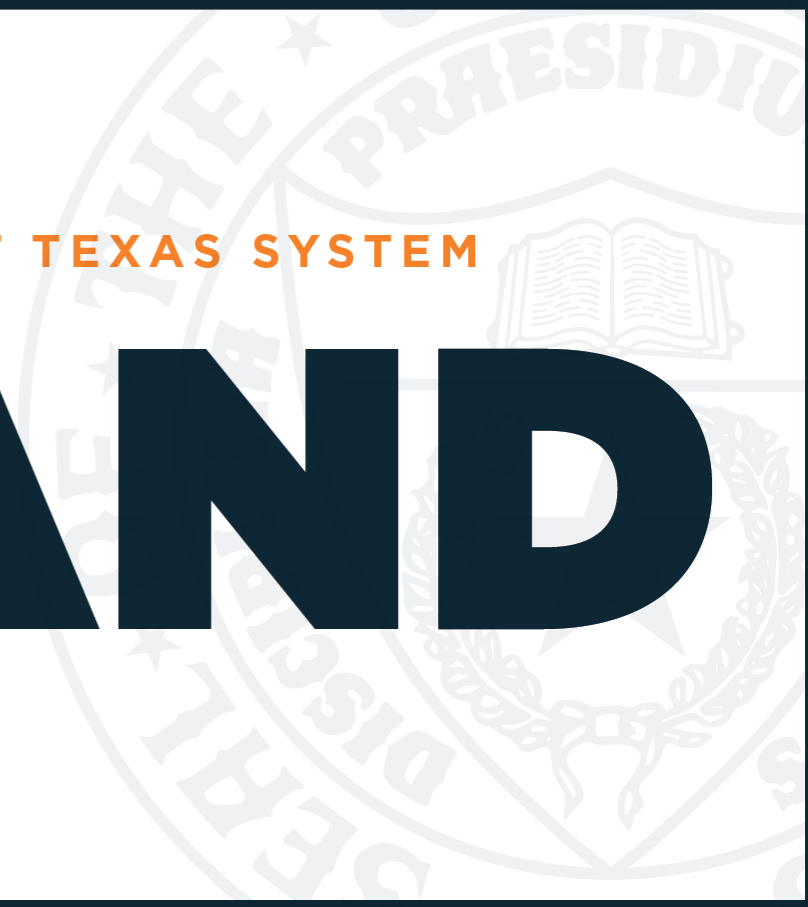


Lara Bailiff
Sr. Administrative Associate



THE UNIVERSITY OF TEXAS SYSTEM

BRAND





The University of Texas System



THE UNIVERSITY *of* TEXAS SYSTEM
FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES.



The University of
Texas System



The University of Texas System



The University of
Texas System



The University of
Texas System



The University of
Texas System



UT SYSTEM

Health
Intelligence
Platform



ElevateTXed
THE UNIVERSITY OF TEXAS SYSTEM



Cultivate
LEARN. GROW. CONNECT.



UT SYSTEM

Texas
Venture
Connect



THE UNIVERSITY OF TEXAS

Education & Research Center *at Laredo*

UT SAN ANTONIO | UT HEALTH SAN ANTONIO | UT HEALTH HOUSTON



The University of
Texas System

TYPOGRAPHY

GOTHAM

abcdefghijklmnopqrstvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789 (!@#\$%&.,?::;)

Lyon Display

abcdefghijklmnopqrstvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789 (!@#\$%&.,?::;)

FREE ALTERNATIVES: MONTSERRAT & BENTHAM (GOOGLE FONTS)



The University of
Texas System



The University of
Texas System



The University of
Texas System



WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU



The University of
Texas System



The University of
Texas System



The University of
Texas System



WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU



The University of
Texas System



The University of
Texas System



The University of
Texas System



WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU



The University of
Texas System



The University of
Texas System



The University of
Texas System



WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

WWW.UTSYSTEM.EDU

UTSYSTEM.EDU/**BRANDING**



2024 Employee Service Awards

Employees with 5, 10, 15, 20+ years (five-year increments) as of 12/31/23 will be recognized. A lunch will be hosted by Chancellor at Bauer House for employees with 20+ years of service.

For employees with 5, 10 & 15 years of service, gifts recognizing their service will be delivered to their office the week of 5/20.

[Link for list of honorees](#). Questions contact Susan Onion in OTI

Budgeting Process

- Key Dates
 - May 1 – Budget Workbook Instructions go out to Department Heads
 - June 3 – Workbooks due
 - August 21 and August 22 – Board of Regents Meeting
 - September 6 – All eForms related to FY25 Budget must be complete and processed

PeopleSoft Updates



Applicant **Disposition Status Reasons** were updated.



Columns have been modified on the **Manage Job Opening** page. Use the **Military Preference Column** to determine applicant eligibility for military employment preference, which expands to qualifying veterans, their qualifying children, and spouses.



Manage Application will now only show sections where applicants answered questions, creating a cleaner page.



A section for **knowledge, skills, and abilities (KSAs)** has been added to the New Position Request and Position Attribute Change eForms. This will allow KSAs to be carried over into the job posting in the designated KSA field.



PeopleSoft Updates



Applicant **Disposition Status Reasons** were updated.
What does this mean?

Disposition	Current Status Reason	Previous Wording
080 Ready to Hire	N/A	Approved by Works Council
110 Reject	Accepted Another Position	Another Job
	Could Not Contact/No Show	Could Not Contact/No Show
	Current Employee Ineligible	Current Employee Non Eligible
	Does Not Meet Minimum Qualific	Does Not Meet Minimum Qualific
	Incomplete Application	Incomplete Application
	Interviewed-Not Best Qualified	Interviewed - Not hired
	Job Opening Cancelled	Job Opening Canceled Job Opening Cancelled
	Non-Competitive	Non-Competitive
Offer Rejected	Offer Rejected	



PeopleSoft Updates



Columns have been modified on the **Manage Job Opening** page. Use the **Military Preference Column** to determine applicant eligibility for military employment preference, which expands to qualifying veterans, their qualifying children, and spouses. **What does this mean?**

Job Opening ID: [Redacted]
 Job Posting Title: [Redacted]
 Job Code: [Redacted]
 Position Number: [Redacted]

Status: 010 Open
 Business Unit: SADD05 (Business Affairs)
 Department: [Redacted]
 Job Family: [Redacted]

Applicants | Applicant Search | Applicant Screening | Activity & Attachments | Details

All (30)	Applied (1)	Reviewed (0)	Screen (0)	Route (1)	Interview (0)	Offer (0)	Hire (0)	Hold (0)	Reject (28)
----------	-------------	--------------	------------	-----------	---------------	-----------	----------	----------	-------------

Applicants ⌵

Select	Applicant Name	Applicant ID	Type	Date Applied	Disposition	Last Updated	Former Employee	Military Preference	Application	Resume	Interest	Mark Reviewed	Route	Interview
<input type="checkbox"/>	[Redacted]	[Redacted]	External	03/19/2024 12:00PM	Applied	03/19/2024 12:00PM	↓	No Military	[Redacted]	[Redacted]	☆☆☆✖	[Redacted]	[Redacted]	[Redacted]

External: Non-employee, applied externally
Employee*: Active employee or POI, applied internally
 *An active employee can show as either employee or external depending on how they applied

Date/time of last update to application

If populated, as it is here, applicant has indicated that they are a former employee.

Use this column to determine whether the applicant is eligible for military preference.
Military: Applicant has indicated eligibility for military preference.
No military: Applicant has *not* indicated eligibility for military preference.

To determine whether the applicant is eligible for Former Foster Child preference, view the application.

Select the applicant's resume attachment to view submitted documents (i.e., cover letter, resume, references, etc.)



PeopleSoft Updates



Manage Application will now only show sections where applicants answered questions, creating a cleaner page. **What does this mean?**

Manage Application

Return | Recruiting Home | Search Applications | Next | Add Applicant Note | Print | Refresh

Personalize

Applicant

Name	Preferred Contact
Applicant ID	Phone
Applicant Type	Email
Status	Address
Jobs Applied	

Job Opening

Job Opening ID	Status
Job Posting Title	Business Unit
Job Code	Department
Recruiter	Job Type
Hiring Manager	Position Number
Salary Range	Job Family

Process Application

Disposition: 010 Applied
Reason: Interest
Date: 11/24/2023

Mark Reviewed | Route | Interview | Reject | Other Actions

Application and Resume | Questionnaire | Notes

Personal Information

Eligible to Work in U.S.	Yes
Are you a former employee	No
Previous Termination Date	

Referral Source

How did you learn of the job?	Posting
Additional Information	Indeed
Specific Referral Source	

Attachments

Attachment	Attachment Title	Attachment Type	Uploaded By	Last Updated
Resume1.pdf	Resume1.pdf	Resume attachments		

Degrees

Degrees	Degree
Bachelor of Business Admin	BBA
Master of Business Admin	MBA

Language Skills

Language Skills	Language
English	EN

PeopleSoft Updates



A section for **knowledge, skills, and abilities (KSAs)** has been added to the New Position Request and Position Attribute Change eForms. This will allow KSAs to be carried over into the job posting in the designated KSA field. **What does this mean?**

eForm Screenshot:

The screenshot shows a web form with several sections: Purpose, Essential Functions (with Function Description and % Time fields), Minimum Qualifications, Preferred Qualifications, Knowledge, Skills and Abilities (highlighted with a red box and a 'New Field' button), and Working Conditions (with Item ID and Description fields). A red line connects the 'Knowledge, Skills and Abilities' field in the eForm to the 'Knowledge, Skills & Abilities' dropdown in the Job Posting Screenshot.

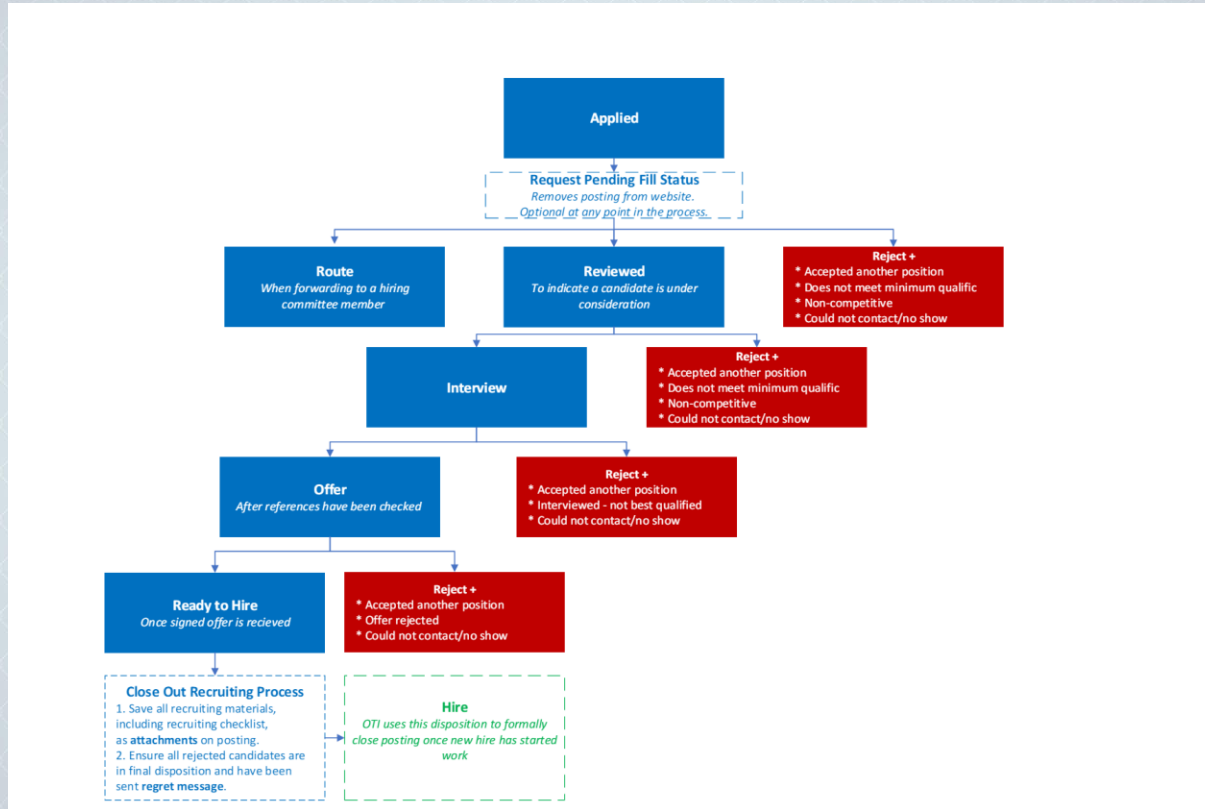
Job Posting Screenshot:

The screenshot shows a job posting form with the following fields: Visibility (set to 'Internal and External'), Description Type (set to 'Knowledge, Skills & Abilities', highlighted with a red box), and Description (containing a list of skills and qualifications). A red line connects the 'Knowledge, Skills & Abilities' dropdown in the Job Posting Screenshot to the 'Knowledge, Skills and Abilities' field in the eForm Screenshot.

KSAs entered in eForm will populate to KSA field in job posting.



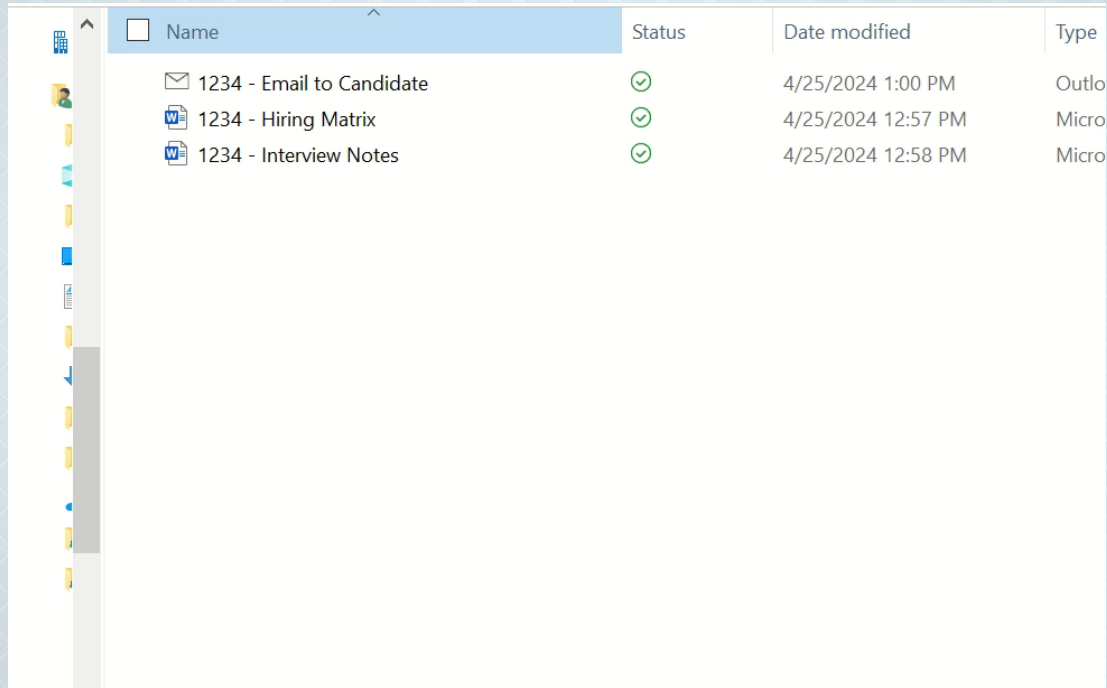
Disposition Workflow









Add Recruiting Documents to Postings

Step 1: Organize and name files using *Posting Number – Document Type*.

TIP:
Compile files
into a zipped
folder



<input type="checkbox"/> Name	Status	Date modified	Type
 1234 - Email to Candidate		4/25/2024 1:00 PM	Outlo
 1234 - Hiring Matrix		4/25/2024 12:57 PM	Micro
 1234 - Interview Notes		4/25/2024 12:58 PM	Micro



Add Recruiting Documents to Postings

Step 2: Inside the posting, upload files as an **attachment** in the **Activity and Attachments**.

Manage Job Opening

[Related Content](#)

| [Return](#) | [Previous](#) | [Next](#) | [Create New](#) | [Clone](#) | [Add Note](#) | [No Category](#) | [Print Job Opening](#)

Job Opening ID 10790
Job Posting Title Rangeland Management Specialist (Midland, TX)
Job Code 19736 (Range Resources Splst)
Position Number 10117477 (Rangeland Management Splst)

Status 010 Open
Business Unit SAD05 (Business Affairs)
Department UNL100 (University Lands)
Company SAD (University of Texas S

[Applicants](#) | **[Activity & Attachments](#)** | [Details](#)

Job History ?

Date	Subject	Reason	Action Taken By
10/03/2023	010 Open		Michelle McCravy
09/28/2023	006 Pending Approval		Ashley King
09/28/2023	005 Draft		Ashley King

PeopleSoft Updates – Expected End Date

- Certain Hourly Appointments
 - Hours per week is equal to or greater than 20
- OTI will automatically add an Expected End Date
 - If the offer letter states an end date and that date is less than 4.5 months from the start date, we'll use the date in the offer letter
 - If the offer letter states an end date that is equal to or greater than 4.5 months OR if there isn't an end date, we'll add a date just under 4.5 months from the start date
- Expected End Date is noted on the automated eForm email

PeopleSoft Updates – Expected End Date

ATTN: New Employee Alert



eForms@utsystem.edu
To

All pre-onboarding employment verifications are finalized and this eForm request is complete.

Please refer to the appropriate checklist to ensure all remaining actions are addressed in a timely manner.

[- Recruiting, Hire, and Transfer for Salaried Positions Checklist](#)

[- Recruiting, Hire, and Transfer for Hourly Positions Checklist](#)

In accordance with statutory retention requirements, please send recruiting materials for all interviewed candidates.

eForm Action	Appointment
Request ID	00466005
Department	Controller
Employee ID	
Start Date	2024-04-29
Location	UTS
Manager	
FT/PT	F
Reg/Temp	R
Comp Frequency	M
FICA Status	N
State	TX

Expected End Date



PeopleSoft Updates – Expected End Date

- Notification of upcoming separation will be sent to the department
- No need to submit Separation eForm
- Aside from submitting the eForm, all other Separation Checklist items must be completed

Performance Appraisals - Timeline

HRBPs can provide guidance on performance measurement, feedback coaching, technical troubleshooting and goal setting.

All employees encouraged to attend training sessions.

DATE	ITEM
Tuesday, 5/14	First Performance Mgmt Training via Zoom 10-11 AM – Employee Training 1:30-2:30 PM – Supervisor Training
Wednesday, 5/15	Second Performance Mgmt Training via Zoom 11 AM-12 PM – Supervisor Training 1:30-2:30 PM – Employee Training
5/14 – 6/30	Annual appraisals occur – HRBPs are available to assist
Sunday, 6/30	PERFORMANCE APPRAISALS DUE
Wednesday, 7/24	Goal Setting Training via Zoom - 2-3 PM
Thursday, 7/25	Goal Setting Training via Zoom - 10-11 AM
Thursday, 8/1	OTI submits report to the Controller's office certifying completed appraisals.
Wednesday, 8/7	HRBP Office Hours for Goals Assistance
Thursday, 8/8	HRBP Office Hours for Goals Assistance
Friday, 8/30	DEADLINE: Goals to be Completed



Performance Appraisals - Exceptions

Performance Appraisals are required for all employees EXCEPT for:

New Employees: Employees who started on or after 1/1/2024 will have probationary appraisals (90th/150th day) in lieu of the annual. However, they will participate in the Goal Setting process (August 2024) for FY25

Hourly Staff: As these appointments are considered temporary, they are not required to undergo the annual performance appraisal process.

POI's (Person of Interest): Are not UT System employees and do not have UT System appraisals assigned.

HR Liaison Manual

- Comprehensive instructional document which contains all HR Liaison job aids
- Actions are grouped together by categories like the HR Liaison Resources web page
- All individual job aids will be removed online
- Access manual from HR Liaison Resources > Resources
<https://www.utsystem.edu/offices/human-resources/current-employees/hr-liaisontimekeeper-resources/hr-liaison-resources>

HR Liaison Manual

Table of Contents

PEOPLESOFT BASICS	3
Logging In	3
Navigating	3
POSITION REQUISITION	5
New Position Request	5
Reclassification	7
Recruit to Fill	8
RECRUITING.....	10
Hourly Job Posting.....	10
Salaried Job Posting.....	10
Create Job Opening	10
Approve Job Posting.....	22
Print Job Posting.....	22
Add Interviewer or Interested Party	24
Review Applicants	25
Route Applicants	28
Add Applicant Notes.....	33
Change Applicant Disposition.....	35
Print Applications	39
Send Rejection Letters.....	41
Create Job Offer	41
Add Recruiting Documents to Job Openings.....	52
HIRE & ONBOARDING.....	53
Hourly Position	53
Salaried Position.....	54
New Appointment eForm.....	54
Internal Transfer eForm	57

PERSONNEL ACTION	59
View Employee's Job Information	60
Reports to Change.....	63
Reclassification	64
Pay Change	64
Promotion	66
Funding Change.....	68
Additional Pay	68
POSITION CHANGES	73
Hours Per Week	73
Working Job Title.....	74
Job Description.....	75
Location.....	76
Inactive Position	77
Reorganization/Restructure.....	78
SEPARATION & OFFBOARDING	79
Leaving UT System	79
Separation eForm.....	79
Retirement eForm	81
Transfer to Other Department at UT System	82
PERSONS OF INTEREST (POI'S)	82
New POI.....	82
Change Expected End Date	85
Separate POI.....	87
QUERIES	88



Wellness & Benefits



Visit ut.limeade.com to enroll.
Watch [promo video](#) to learn more.



Coming Attractions

Retirement Sessions – May 29th
Annual Enrollment Fair – July 17th



- Wellness Leave was recently updated to include the following eligible activities:
 - Physical Fitness,
 - Stress Management,
 - Smoking Cessation,
 - Weight Loss,
 - Nutrition Classes,
 - Health Risk/Injury Reduction, and
 - Community Volunteering.

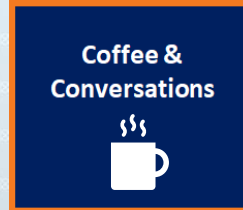
[Wellness Leave Agreement](#)
HOP 3.3.1 Leave Policy
- New Wellness Communication (format)



Cultivate – Updates

The learning and development program designed to help UT System Administration employees learn, grow, and connect.

- **Learn more** at <https://utsystemadmin.sharepoint.com/sites/cultivate>
- **Questions?** E-mail: cultivate@utsystem.edu



Cultivate – Upcoming Events

- **WORKSHOPS:**
 - Rapid Trust on 5/13
 - Emotional Intelligence on 5/20
 - Presentations that WOW on 5/28
- **COFFEE & CONVERSATIONS:**
 - Meet the Archer Center Team on 5/15



UT System Internship (UTSI) & Law Clerkship (LC)

- **Summer 2024 Cohort** = 40 students!
- **Key Dates:**
 - 5/30 Tech On-Boarding
 - 5/31 Orientation
 - 6/3 First Day
 - 7/30 & 31 Intern & Law Clerk Summit
 - 8/9 Last Day

Roundtable and Questions

