

January 4, 2016

No. 02 - FY 2016

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AVP for Business Affairs

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TO: Executive Committee Members, Assistant Vice Presidents, Chairs, Directors, Department Heads, Assistants to the Deans and Vice Presidents, and Departmental Administrators

FROM: Andrea M. Marks, MBA, CPA
Vice President and Chief Financial Officer

SUBJECT: Business Affairs eForms – Prior Approval

Business Affairs has been actively engaged in developing tools to streamline our business processes and is ready to deploy the first tool aimed at reducing the use of paper forms. We are pleased to launch an electronic forms site: **Business Affairs eForms**.

Our first electronic form is the Prior Approval eForm. This e-form will replace the paper *Prior Approval (for payments to consultants)*, and also eliminates the paper version of the *Employee/Independent Contractor Classification Checklist* by incorporating the checklist into one e-form.

EFFECTIVE DATE AND TRANSITION PERIOD

Effective immediately, departments should begin using the Prior Approval eForm. We recognize the need to allow time for paper Prior Approvals in process to reach the office of the AVP for Business Affairs (AVPBA). Prior Approvals received by AVPBA by close of business on Friday, January 15th, will be accepted. After this deadline, any paper Prior Approval received will be scanned and returned via email to the department with instructions to use the Prior Approval eform.

WHY WAIT? REAP THE BENEFITS!

There are so many benefits to using the Prior Approval eForm that we strongly encourage departments which have paper Prior Approvals in process to enter them as eforms rather than sending the paper document to AVPBA.

Below are just a few of the benefits that our pilot departments have identified:

- Faster processing of approvals
- No lost/misplaced Prior Approvals
- Online checks reduce errors and virtually eliminate “kick-backs”
- No need to attach eform to the voucher when processing payment
- *Make Copy* feature reduces effort
- Email notifications of approvals
- Travel Services gets email notification of direct bill lodging
- Real-time monitoring of the eform throughout the process

ACCESS

There is no need to request access to the Business Affairs eForms site. Here is the URL for the eForms site: https://hscshare.uthscsa.edu/sites/financials/BAO_eForms/. If prompted with a login box, employees should use their HSC username and password.

SYSTEM REQUIREMENTS

Employees may use the following browsers with eForms.

- PC Users:
 - Microsoft Internet Explorer
 - Version 11 is preferred, although versions 9 and 10 can be used.
 - **IMPORTANT:** If Microsoft Internet Explorer 11 will be used, [watch this video](#).
 - Firefox (latest version)
 - Chrome (latest version)
- Macintosh Users:
 - Firefox only (latest version); Safari was tested, but was deemed incompatible

TRAINING AND ASSISTANCE

Departmental employees who create and/or approve Prior Approvals should view the [training videos](#) available on Business Affairs eForms site. This site also includes an extensive list of *Frequently Asked Questions* (FAQs) which were developed based on feedback received from the 31 departments that participated in our pilot over the last several months.

For assistance with Business Affairs eForms, or questions about the site, see “Contact Us” on page 1. For the Prior Approval eform, you can also click the *Who to Contact* link under the **Help Topics** appearing on the Prior Approval home page. See below.

Business Affairs eForms › Prior Approval

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Business Affairs eForms

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Business Affairs Forms

Prior Approval

Available Actions:

- **Create New Prior Approval**
- **Department Approval**
- **Search for a Prior Approval**
- **AVPBA Review**
- **Sanction Check**
- **AVPBA Approval**

Help Topics

- What is a Prior Approval?
- HOP Policy 6.1.4 Payments to Consultants and Non-Employees
- Videos (Training and Help)
- Resolving Critical Error for Microsoft Internet Explorer 11
- Who to Contact**
- Create a Problem Report