

CU 8.9 HRMS Step by Step Guide

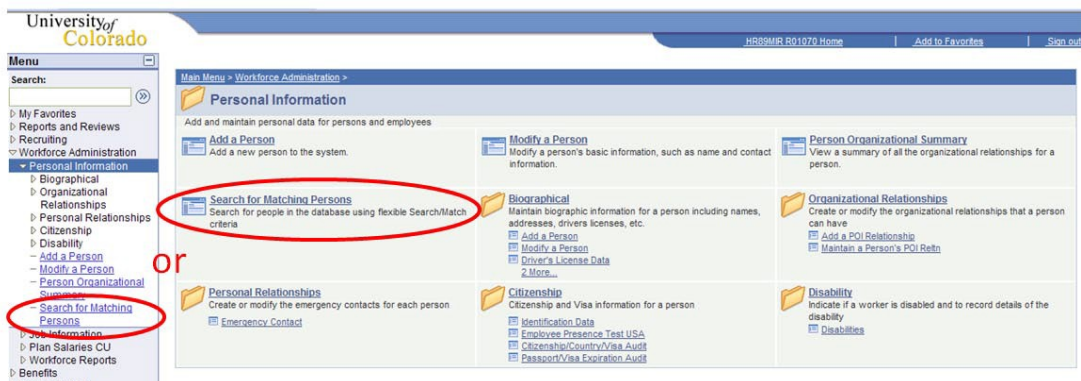
Hire Regular Faculty - Monthly Pay Frequency - Workforce Administration Module

Overview: This guide provides instruction for hiring a regular faculty member on a monthly (*not contract*) pay frequency cycle. (Generally used for medical faculty.)


Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Search for Matching Persons

- Workforce Administration
- Personal Information
- To begin, verify that the Person does not already exist in HRMS
- Click on Add a Person, and then [Search for Matching Persons](#) (or click on [Search for Matching Persons](#) in the menu/navigation bar)



2. Search Criteria page displays

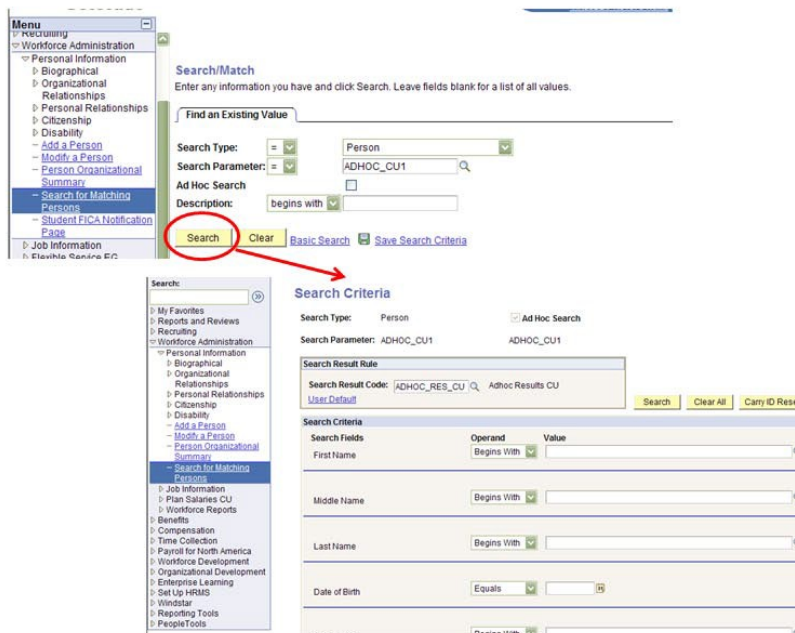
- Keep your search as broad as possible (ex: search by Last Name only and pick from the resulting list)
- Name fields must be an exact name match, and are case sensitive. Correct ex: Sharon (not Shari), Johnson (not johnson)
- Note: If using SSN, enter numbers only without dashes. Using the National ID (SSN) may not provide any data for existing POIs who are not a Security Access POI
- Click 

3. When person does not already exist in HRMS, begin the Add a Person process

Navigation:

- Workforce Administration
- Personal Information
- Add a Person

Note: When person already exists in HRMS, refer to either the *Add Employment Instance*, or *Transfer/Rehire* step-by-step guide. (Navigation is: Workforce



Search/Match
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Type: Person
Search Parameter: ADHOC_CU1
Ad Hoc Search: begins with

Search Clear Basic Search Save Search Criteria

Search Criteria
Search Type: Person
Search Parameter: ADHOC_CU1
Search Result Code: ADHOC_RES_CU
Search Result Value: ADHOC Results CU

Search Fields	Operand	Value
First Name	Begins With	
Middle Name	Begins With	
Last Name	Begins With	
Date of Birth	Equals	

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: ADHOC_CU1 ADHOC_CU1

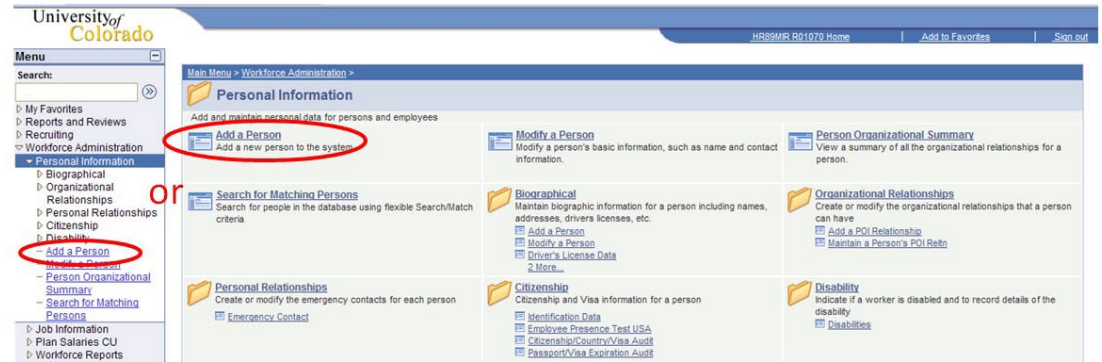
Search Result Code: ADHOC_RES_CU
User Default

Search Criteria

Search Fields	Operand	Value
First Name	Begins With	Michael
Middle Name	Begins With	
Last Name	Begins With	Buble

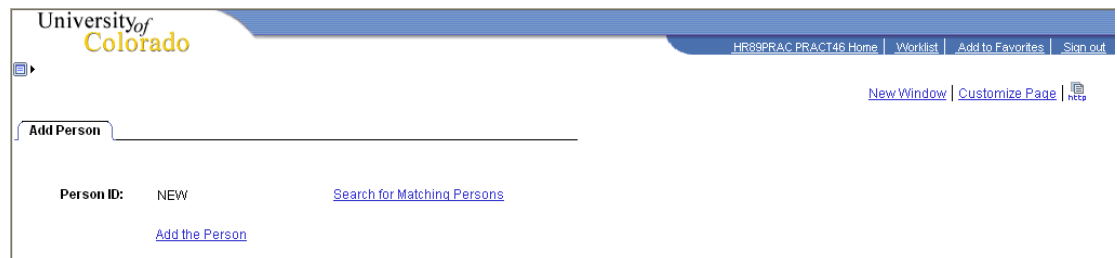
Microsoft Internet Explorer
Search Criteria did not return any results (18160,43)
Enter new or additional Search Criteria
OK

Administration / Job Information / Add Employment Instance or Transfer/Rehire)



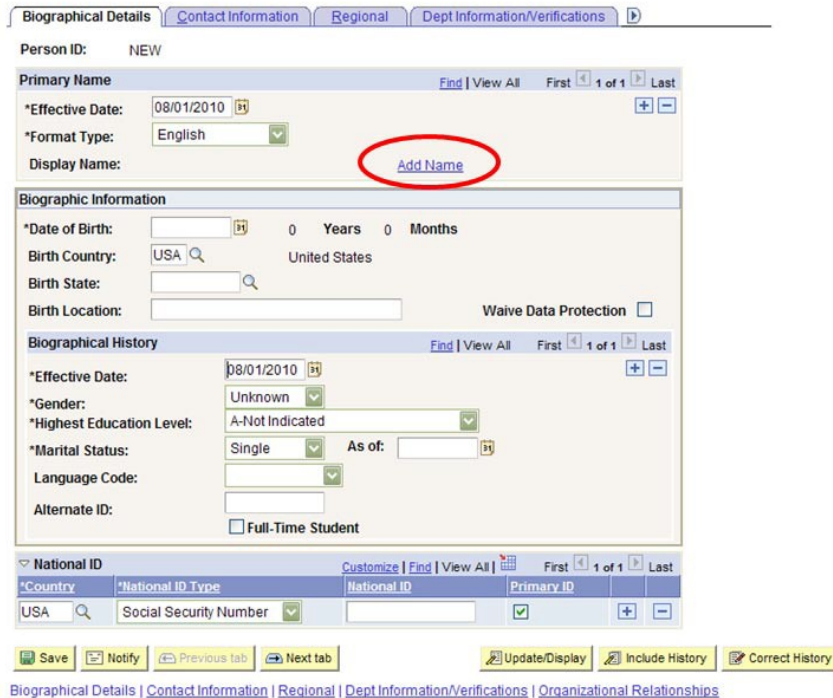
4. Add Person page displays

- Click [Add the Person](#)



5. Biographical Details page displays

- Effective date defaults to current date; date you are entering data. Leave as is or change to hire date or other appropriate date. This date cannot be future-dated. (Generally, this date is the date of hire; however, the official date of hire will be recorded in Job Data.)
- Click [Add Name](#)



6. Edit Name page displays

- Enter name information as it appears on SS card
- Click **OK** to return to Biographical Details page

Edit Name

English Name Format

Prefix:

First Name: Middle Name:

Last Name:

Suffix:

Display Name:

Formal Name:

Name:

OK **Cancel**

7. Biographical Details page re-displays

- Enter Date of Birth
- Enter Gender
- Enter SSN/National ID – numbers only, without dashes
- Other info on this page is optional; enter if known
- Click **Contact Information**

Biographical Details | **Contact Information** | Regional | Dept Information/Verifications

Person ID: NEW

Primary Name Find | View All First 1 of 1 Last

*Effective Date: 08/01/2010

*Format Type: English

Display Name: **Smith, Susan A.** [Edit Name](#)

Biographic Information

*Date of Birth: 01/01/1970 40 Years 7 Months

Birth Country: USA United States

Birth State:

Birth Location: Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date: 08/01/2010

*Gender: **Female**

*Highest Education Level: A-Not Indicated

*Marital Status: Single As of:

Language Code:

Alternate ID: Full-Time Student

National ID Customize | Find | View All First 1 of 1 Last

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number	999-88-7777	<input checked="" type="checkbox"/>

Save **Notify** **Previous tab** **Next tab** **Update/Display** **Include History** **Correct History**

Biographical Details | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

8. Contact Information page displays

- Click [Add Address Detail](#). The Home address is the employee's permanent address. Ex: Colorado, France, India, etc.

Biographical Details | **Contact Information** | Regional | Dept Information/Verifications | Organizational Relationships

Person ID: NEW

Current Addresses [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Address Type	As Of Date	Status	Address		
Home	08/01/2010			Add Address Detail	+ -

Phone Information [Customize](#) | [Find](#) | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
			<input type="checkbox"/>	+ -

Email Addresses [Customize](#) | [Find](#) | First 1 of 1 Last

*Email Type	*Email Address	Preferred	
Campus		<input type="checkbox"/>	+ -

Save Notify Previous tab Next tab Update/Display Include History Correct History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

9. Address History page displays

- Change Country, if applicable
- Click [Add Address](#)

Address History

Address Type: Home

Address History [Find](#) | First 1 of 1 Last

*Effective Date	Country	*Status	Address:	
08/01/2010	USA	A		Add Address

OK Cancel

10. Edit Address page displays

- Enter address
- Click and then again

Edit Address

Country: United States

Address 1:

Address 2:

City: State: Colorado Postal:

County:


OK Cancel


11. Contact Information page re-displays

- If Mailing address is different than Home address, click + by [Edit/View Address Detail](#) to add a record.
- Select "Mailing" from

the dropdown menu and then

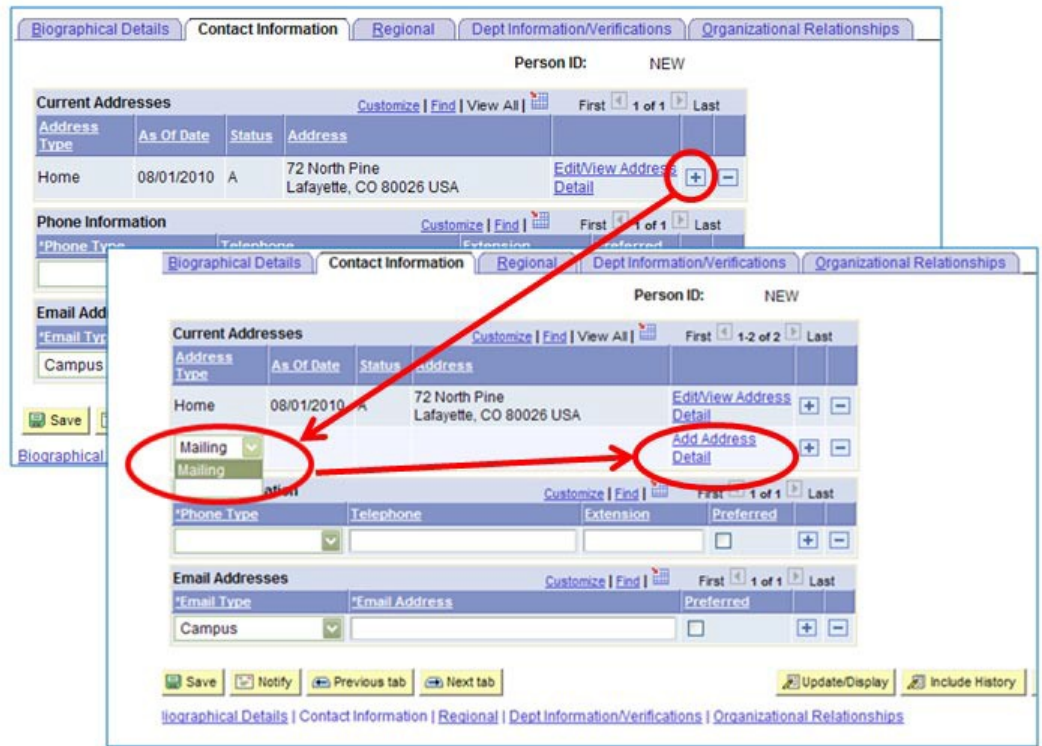
[Add Address Detail](#)

- **Note:** Mailing address must be a local Colorado address
- Select the appropriate Phone Type and enter telephone #
- Click on  to add additional phone numbers; Indicate the Preferred telephone contact by selecting the appropriate checkbox
- Select the appropriate Email Type and enter the email address


Click on  to add additional email addresses; Indicate the Preferred email contact by selecting the appropriate checkbox

- Click


[Regional](#)






Person ID: NEW

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	08/01/2010	A	72 North Pine Lafayette, CO 80026 USA	Edit/View Address Detail 


Phone Information

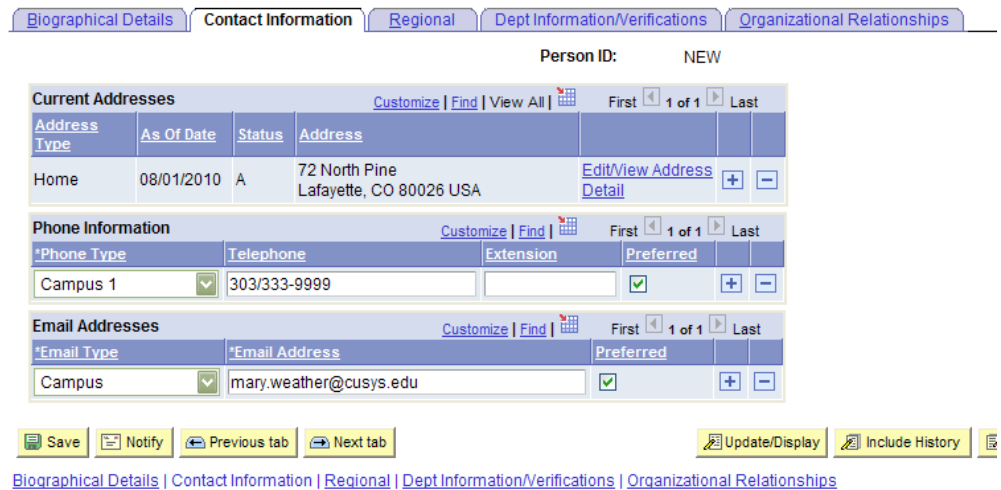
*Phone Type	Telephone	Extension	Preferred
			<input type="checkbox"/>

Current Addresses


Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	08/01/2010	A	72 North Pine Lafayette, CO 80026 USA	Edit/View Address Detail 
				Add Address Detail 

Email Addresses


*Email Type	*Email Address	Preferred
		<input type="checkbox"/>




Person ID: NEW

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	08/01/2010	A	72 North Pine Lafayette, CO 80026 USA	Edit/View Address Detail 


Phone Information

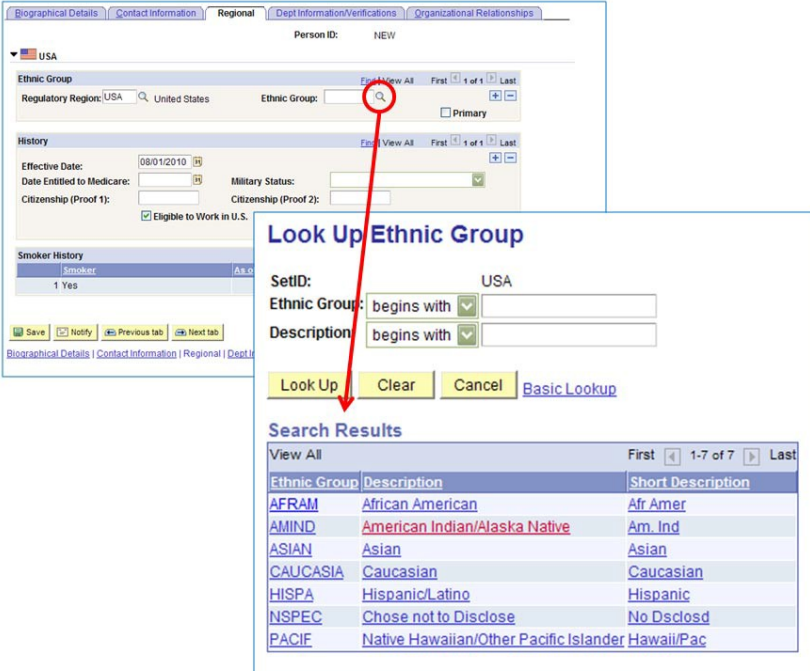
*Phone Type	Telephone	Extension	Preferred
Campus 1 	303/333-9999		<input checked="" type="checkbox"/>

Email Addresses

*Email Type	*Email Address	Preferred
Campus 	mary.weather@cusys.edu	<input checked="" type="checkbox"/>

12. Regional page displays

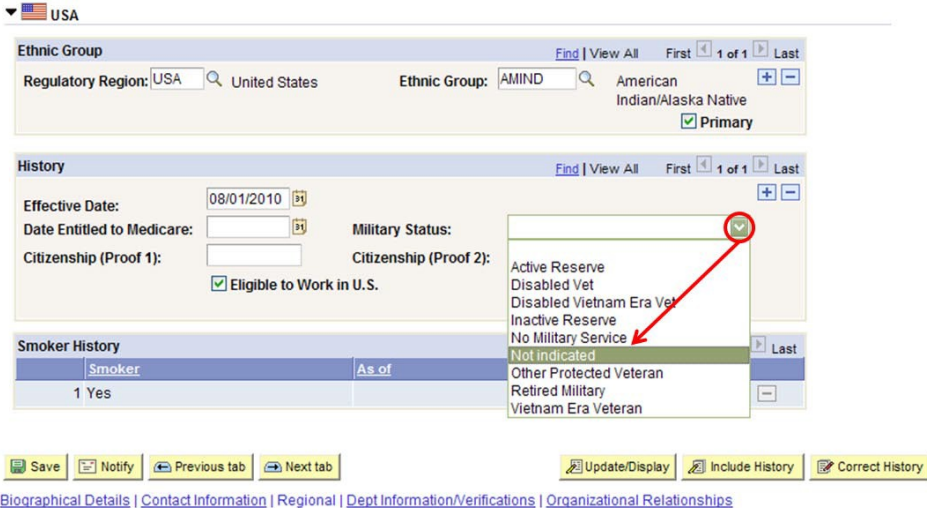
- Ethnic Group is required. Primary box will be checked automatically for first choice.
- If applicable, enter additional ethnic groups by inserting a row 



The screenshot shows the 'Regional' page with the 'Ethnic Group' dropdown menu open. A red circle highlights the search icon next to the 'Ethnic Group' field. A red arrow points from this circle to the 'Look Up Ethnic Group' dialog box. The dialog box has 'SetID: USA' and 'Ethnic Group: begins with' and 'Description: begins with' dropdowns. Below the dialog is a 'Search Results' table:

Ethnic Group	Description	Short Description
AFRAM	African American	Afr Amer
AMIND	American Indian/Alaska Native	Am_Ind
ASIAN	Asian	Asian
CAUCASIA	Caucasian	Caucasian
HISPA	Hispanic/Latino	Hispanic
NSPEC	Chose not to Disclose	No Dsclosd
PACIF	Native Hawaiian/Other Pacific Islander	Hawaii/Pac

- Click Military Status dropdown menu and choose status if known, or “Not Indicated” if unknown. This field must be populated in order to anchor the effective date on this page.
- Click



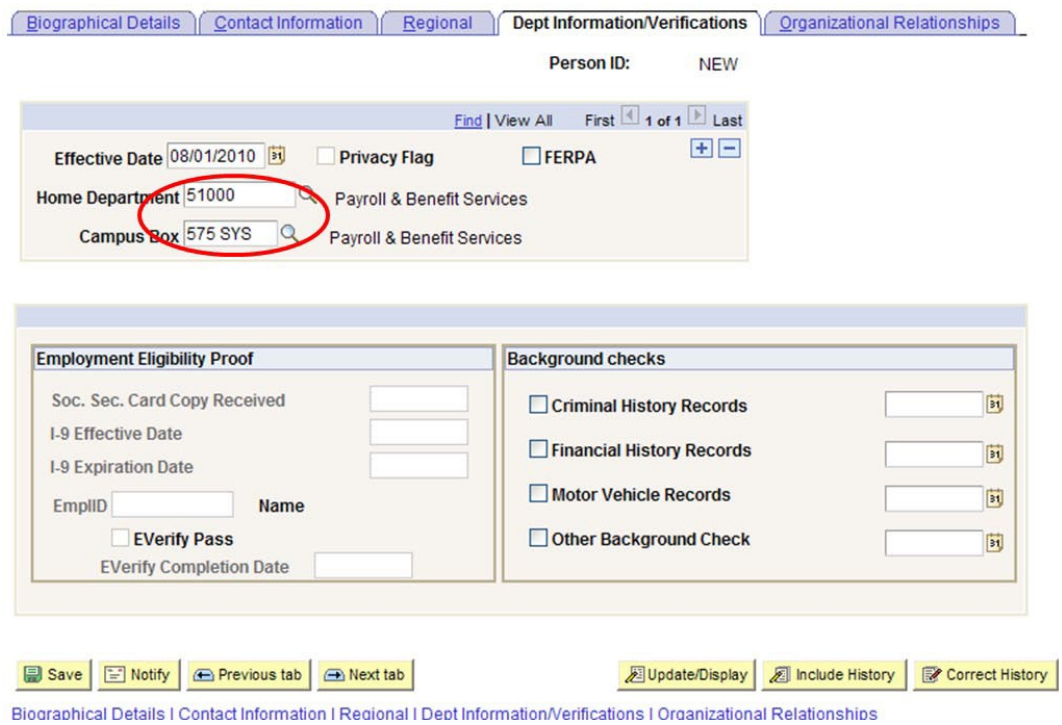
The screenshot shows the 'Regional' page with the 'Military Status' dropdown menu open. A red circle highlights the 'Not indicated' option. Below the dropdown menu is a 'Smoker History' table:

Smoker	As of
1 Yes	

[Dept Information/Verifications](#)

13. Dept Information/ Verifications page displays

- Home Department and Campus Box are required.



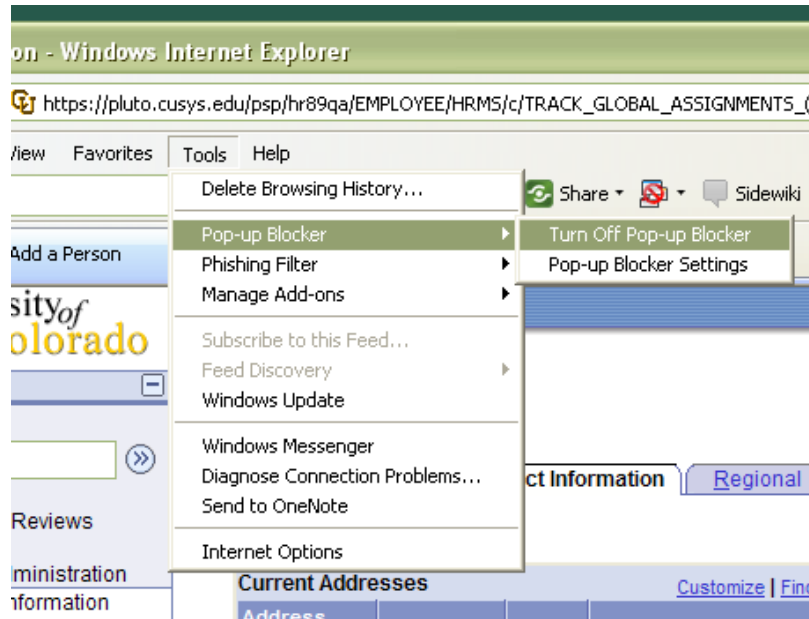
- Click

[Organizational Relationships](#)

14. Organizational Relationships page displays

- Note: Before saving record, be sure Pop-up blockers are off!!! See below.**

- Go to Internet 'Tools'
 - Select 'Pop-up Blocker'
 - Select 'Turn Off Pop-up Blocker'



- Check Employee box

- Click Save or

[Add the Relationship](#)

[Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

Person ID: NEW

Choose Org Relationship to Add



Employee
 Contingent Worker
 Person of Interest

or

[Go to Person Checklist](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Dept Information/Verifications](#) | [Organizational Relationships](#)

15. Work Location page displays

- Enter date of hire
- **Hire** action defaults
- Enter Reason from Look Up list 
- Enter position number*
- Job Notes may be added on any page by clicking  icon

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Compensation](#) | [Employment Information](#)

Smith, Susan A EMP ID: 216544 Empl Rcd #: 0

[Find](#) | [View All](#) | First 1 of 1 Last

HR Status: Active Empl Status: Active

*Effective Date: 08/15/2010 Sequence: 0 Job Notes

Action / Reason: Hire HIR New Hire

Position Number: 00150102 Professor

Regulatory Region: USA United States

Company: CU University of Colorado

Business Unit: UCOLO University of Colorado

Department: 10189 Dept of Atmos & Oceanic Sci

Location: 1DUAN Duane Phy & Astro, Gamow Twr

Establishment ID: CU University of Colorado

Position Entry Date: 08/15/2010
[Position Data](#) [Funding Distribution](#)

Appointment End Date:

Department Entry Date: 08/15/2010

Last Updated By: PRACT01 PRACT01 Last Updated: 08/15/2010 9:57:29PM Date Created: 08/15/2010

Note: * If the hire date is prior to the effective date of the position **or** if the position has not been approved, you will not be able to save the hire. A position in Proposed status will have to be approved before proceeding. Once the position has been approved, navigate to Add Employment Instance to complete the hire. (Workforce Administration / Job Information / Add Employment Instance). Refer to the Add Employment Instance step-by-step guide for more information.

16. Notepad page displays

- Click
- Enter note/comments
- Click on [Job Data Page](#) link to return to page

 **Job Data Notepad**

Job Data Page"/>

There are no existing notes for the specified search criteria.

*ID: 216544 Smith, Susan A

*Empl Rcd#: 0

*Eff Date: 2010-08-15

*Sequence: 0

Earliest Note Date End

- Click on [Job Information](#)

17. Job Information page displays

- Empl Class will default from Job Code upon saving
- Percent of Time and Standard Hours default from position data and can be updated. A change to either one updates the other
- Reports To defaults from position data
- Click [Payroll](#)

Work Location | **Job Information** | Payroll | Compensation | Employment Information

Smith, Susan A EMP ID: 216544 Empl Rcd #: 0

Job Information [Find](#) | [View All](#) | First 1 of 1

Effective Date: 08/15/2010 Sequence: 0 Job Notes Appr Status: Proposed 01/01/2010
 Action / Reason: Hire New Hire Appr/Reject

Job Code: 1101 Professor Entry Date: 01/01/2010

Reports To: 00636458 Director-Exmpt Prof 113109 Langston, Matthew

Regular/Temporary: Regular Full/Part: >= 50%
 Empl Class: *Officer Code: None

Regular Shift: N/A Percent of Time: 100.00

Classified Indc: Reg Fac

Standard Hours

Standard Hours: 40.00

FTE: 1.000000 Adds to FTE Actual Count?

USA

FLSA Status: Exempt

18. Payroll page displays

- All fields default
- Tax Location Code & FICA Status default from job code and location code. Can be updated if needed, but system will set the final FICA Status
- Click [Compensation](#)

Work Location | Job Information | **Payroll** | Compensation | Employment Information

Smith, Susan A EMP ID: 216544 Empl Rcd #: 0

Payroll Information [Find](#) | [View All](#) | First 1 of 1 | Last

Effective Date: 08/15/2010 Sequence: 0 Job Notes Appr Status: Proposed 01/01/2010
 Action / Reason: Hire New Hire Appr/Reject

*Payroll System: Payroll for North America

Payroll for North America

Pay Group: MON Monthly Employee

Employee Type: S Salaried Holiday Schedule: NONE No Hol Sch

Tax Location Code: NO LOCAL NONE FICA Status: Subject

19. Compensation page displays

- Frequency defaults to "C" (Contract) based on job code. Change to "M" for monthly pay cycle
- In Pay Components section:
 - enter monthly Rate Code of BASEM
 - enter monthly Comp Rate
- Click [Calculate Compensation](#)
- Click [Employment Information](#)

Smith, Susan A EMP ID: 216544 Empl Rcd #: 0

Compensation [Find](#) | [View All](#) First 1 of 1 Last

Effective Date: 08/15/2010 Sequence: 0 Job Notes Appr Status Proposed 08/15/2010
 Action / Reason: Hire New Hire Appr/Reject Current

Compensation Summary

Base Compensation Rate: 13,333.000000 *Frequency: M Monthly
 Total Compensation Rate: 13,333.000000

Salary Administration Plan: 110 Grade: 000 Standard Hours: 40.00
 Job Code: 1101 Professor Percent of Time: 100.00 FTE: 1.000000

Comparative Information

Change Amount: 0.000000 USD Monthly Monthly Hrly Rate
 Change Percent: 0.000

Pay Rates

Annual	159,996.000000 USD	Daily	615.369231 USD
Monthly	13,333.000000 USD	Hourly	76.921154 USD

Pay Components [Customize](#) | [Find](#) | First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEM	0	13,333.000000	USD	M

[Calculate Compensation](#)

20. Employment Information page displays

- Because Comp Frequency is Monthly, click [12 Month Faculty](#) which will automatically set up Vacation and Sick Leave accruals for employee
- Enter Appointment End Date, if applicable
- Review and **Save***
- For new hires, system automatically transfers to Emergency Contact page

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Compensation](#) | **Employment Information**

Smith, Susan A EMP ID: 216544 Empl Rcd #: 0

Empl Rcd: 0 Univ Employment Date: 08/15/2010 Override
 Last Start Date: 08/15/2010
 Termination Date:

Empl Record

	Years	Months	Days
Service Dt: 08/15/2010	0	0	14
Class Staff Seniority Date:	0	0	0

Class Staff Save Pay End Date:
 Business Title: Professor Classified Staff LOS:
 Classified Staff Certification Date: Job Code Entry Date:

Background checks

Criminal History Records Financial History Records
 Motor Vehicle Records Other Background Check

USA

12 Month Faculty

Appointment End Date:

Contract Length:

Accrue Tenure Services

FTE for Tenure Accrual:

Service Calculation Group:

FTE for Flex Service Accrual:

Note: * If the hire date is prior to the effective date of the position **or** if the position has not been approved, you will not be able to save the hire. A position in Proposed status will have to be approved before proceeding. Once the position has been approved, navigate to Add Employment Instance to complete the hire. (Workforce Administration / Job Information / Add Employment Instance). Refer to the Add Employment Instance step-by-step guide for more information.

21. Emergency Contact page displays

- Enter Contact Name & Relationship to Employee
- Identify Primary Contact by clicking on checkbox
- If contact has same address and phone number as employee, check those boxes
- If contact has other address, click [Edit Address](#)
- Notice that multiple emergency contacts can be designated by inserting rows
- Additional phone numbers can be entered on Other Phone Numbers page
- Review and **Save**

Contact Address/Phone [Other Phone Numbers](#)

Smith, Susan A Emplid: 216544

Emergency Contact [Find](#) | [View All](#) First 1 of 1 Last

*Contact Name:

*Relationship to Employee: Primary Contact

Same Address as Employee

[Return to Personal Data](#) Same Phone as Employee

Contact Address

Country: United States

Address: [Edit Address](#)

Contact Phone

Phone:

Hire Regular Faculty - Monthly Pay Cycle complete