



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

Life Cycle Exercises

Regular Faculty Member

Create and Approve a Position

Jobs at CU - Recruiting

Hire

Terminate at End of Academic Year Contract

Professor

page intentionally left blank

Life Cycle of a Regular Faculty Member - Professor

This group of exercises follows the life cycle of a faculty member from position creation through termination. We will work with a Professor in Physics.

- Create and Approve a Position**
- Record Open Position in Jobs at CU**
- Hire**
- Terminate at End of Academic Year Contract**

Notes:

These exercises are for use in the HRMS Practice Area database during classroom training only. Each campus has different faculty appointment processes. Check your campus Faculty Affairs and/or Human Resources divisions for specific processes. The entry of data in these exercises does not follow any single campus' requirements.

Exercise 1 – Create and Approve a Faculty Position

Scenario: Create and approve the professor position.

Step 1: Navigation: Home; Organizational Development; Position Management; Maintain Positions/Budgets; Add/Update Position Information; **Add a New Value**

Add/Update Position Info

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

Find an Existing Value **Add a New Value**

Position Number: begins with [v] [text box]

Description: begins with [v] [text box]

Position Status: = [v] [text box] [v]

Business Unit: begins with [v] [text box] [magnifying glass]

Department: begins with [v] [text box]

Job Code: begins with [v] [text box] [magnifying glass]

Reports To Position Number: begins with [v] [text box]

Include History

Search **Clear** [Basic Search](#)  [Save Search Criteria](#)

Find an Existing Value **Add a New Value**

Step 2:

On the Description page, enter the following:

Effective Date: (required)	Enter date position is to be available. Date must be on or prior to the Hire / Contract Begin Date for the new professor)
Job Code: (required)	1101 (Professor)
Department (required)	10108 (Physics)
Location Code (required)	1DUAN Defaults from Department. May be changed if necessary
Reports To: (optional, except for classified employees)	Enter position # of the supervisor/evaluator for this faculty position. In the practice area, there may not be an appropriate position to use for your professor; just pick a position of your choice from the list
Position Notes: (optional)	May be entered only after position has been saved

Notes:

HRMS uses auto-numbering to assign numbers to positions and employees. The system will assign the next available number once you have saved your work.

The Appointing Authority field is not required – use if desired.

The 7 Checkboxes are informational only; use if applicable.

The Faculty/Exempt Professional – Proposed Costs section is informational only; use if desired.

The Regular/Temporary and Full/Part Time fields default based on the Job Code. Both fields have a direct relationship to whether or not this is a benefit eligible position.

The Percent of Time and Standard Hours fields are linked and are used to calculate leave accruals and benefit eligibility, when applicable.

Salary Plan Information values default from Job Code. A change to either one updates the other.

FLSA defaults based on job code.

Step 3:

Compare your Description page with the one shown below. Because the Effective Date reflects the date you have entered, your page may differ from the one shown here:

University of Colorado HR89PRAC.PRACTB1 Home

[New](#)

Description | [Specific Information](#) | [Position and Incumbent Data](#)

[Save](#) [Refresh](#) [Update/Display](#) [Include History](#)

Position Information Find | View All First 1 of 1 Last

Position Number: 00000000 Professor [Go To Position Funding](#) + -

Headcount Status: Current Head Count: 0 out of 0

*Effective Date: 04/30/2007 Position Notes *Status: Active

*Reason: NEW New Position Action Date: 04/03/2007

Position Status: Proposed Status Date: 04/30/2007

Job Information

*Business Unit: UCOLO University of Colorado

Job Code: 1101 Professor Manager Level:

*Reg/Temp: Regular *Full/Part Time: >= 50%

Regular Shift: N/A

Title: Professor Short Title: Professor [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Department: 10180 Physics Company: CU University of Colorado

Location: 1DUAN Duane Phy & Astro, Gamow Twr

Reports To: Appointing Authority:

Essential Services Class Staff Seasonal or Academic Year Appointment? Supervises Classified Staff

Special Opportunity Posn Preplacement Physical Required Class Staff Spec Quals Officer Position

Faculty/Exempt Professional -

	Minimum	Maximum
Proposed Costs		
Salary Range:	<input type="text"/>	<input type="text"/>
Start Up Cost:	<input type="text"/>	<input type="text"/>
Moving Expense:	<input type="text"/>	<input type="text"/>
Total:		

Salary Plan Information

FTE: Percent of Time: 100.00

Salary Admin Plan: 110 Grade: 110

Standard Hours: 40.00 Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

FLSA Status: Exempt

[Save](#) [Notify](#) [Previous tab](#) [Next tab](#) [Add](#) [Update/Display](#) [Include His](#)

[Description](#) | [Specific Information](#) | [Position and Incumbent Data](#)

Step 4:

Click [Specific Information](#) or use the [Specific Information](#) link at the bottom of the page
On Specific Information page, enter the following:

Update Incumbents	Leave as is for position creation. When an employee is assigned to this position, the system will automatically check this box “on”
Pay Group and Employee Type (required)	Leave as is. These two fields default based on the Job Code
Background Checks (optional)	Select appropriate check boxes, if applicable
HIPPA Access check boxes	Currently used only for UCDHSC positions. Defaults based on UCDHSC Department
Requirements for Hazardous Materials Handling or Exposure (required)	Provide Yes or No answer

Notes:

Some information on Specific Information page defaults from information on Description page.
The Calc Group (Flex Service) and Academic Rank fields are not used at CU at this time.

Step 5:

Compare your Specific Information page with the one shown below:

The screenshot shows the 'Specific Information' page for a position at the University of Colorado. The page includes the following fields and sections:

- Headcount Status:** Current Head Count: 0 out of 0
- Specific Information:** Find | View All | First | 1 of 1 | Last
- Effective Date:** 04/30/2007
- Position Notes:**
- Status:** Active
- Max Head Count:** 1
- Wrks Comp:** College/Prof/Teach/Clerical
- Pay Group:** MON Monthly Employee
- Employee Type:** Salaried
- Incumbents:**
 - Update Incumbents
 - Include Salary Plan/Grade
- Background Checks:**
 - Criminal History Records
 - Financial History Records
 - Motor Vehicle Records
 - Other Background Check
- Budgeted Position
- Confidential Position
- Job Sharing Permitted
- Education and Government:**
 - Classified Indicator:** Reg Fac
 - FTE:** 0.000000
 - Adds to FTE Actual Count
 - Calc Group (Flex Service):** [Search]
 - Academic Rank:** [Search]
- Required HIPAA Access:**
 - PHI
 - Treatment
 - Research
 - Payment
 - Operations
- Requirements for Hazardous Materials Handling or Exposure:**
 - Hazardous Chemicals: Yes No
 - Radioactive Materials/Ionizing Radiation: Yes No
 - Infectious Matls/Human Blood or Bodily: Yes No

At the bottom of the page, there are navigation buttons: Save, Notify, Previous tab, Next tab, Add, Update/Display, and Include History. The breadcrumb trail at the bottom reads: Description | Specific Information | Position and Incumbent Data.

Step 6:

Click:  **System assigns new position number**

Position Notes: May be entered after saving

Note:

[Position and Incumbent Data](#)

page is summary information, populated when position is filled.

Step 7:

Click on [Go To Position Funding](#) link. Funding Distribution page displays in new window.

Funding Begin Date (required)	Enter same date that was entered for position
PCT Radio Button Distribution Percent: (required) SpeedType: (required) Funding End Date: (optional)	Defaults to ON: Change to AMT if salary is recorded by estimated amount instead of percent 100% 11022108 (Physics) If left blank, funding is continuous from the SpeedType. Check campus requirements for use of this field relative to EE group
Funding Notes (optional)	Record any comments relative to the funding for this position

Notes:

Funding Begin Date for **new** positions must match the new position effective date. When funding updates are made later on, the funding begin date will default to the first day of the current unprocessed pay period for the pay group (MON or BW).

Funding end date will NOT stop pay. Payroll expense will be recorded in **suspense** Speed Type instead of departmental Speed Type if funding end date is exceeded.

When using multiple funding sources, the total of all distribution rows must equal 100% for each funding begin date.

Funding Distribution can be entered by amount or percent. If using estimated amount field, system automatically adjusts the percent to match the amount(s) entered.

End users cannot add, delete or correct funding for a pay period that has been closed. Funding changes for prior pay periods must be done with a Payroll Expense Transfer (PET).

Funding must be created and saved before position can be approved.

Both funding and position require approval.

Step 8:

Compare your Funding Distribution page with the one shown on the next page. Your page may differ from the one shown here because Funding Begin and End Dates may differ.

University of Colorado

HR83PRAC PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Page

Funding Distribution | Position and Incumbent Data

Save | Return to Search | Next in List | Previous in List | Refresh

Go To Position Data

Funding Find | View All First 1 of 1 Last

Position Number: 00679961 Sequence: 0 Entered Date: 04/03/2007

Funding Status: Proposed Funding Status Date: 04/03/2007

Funding Begin Date: 04/30/2007

Distribution Find | View All First 1 of 1 Last

	*Percent	*Speed Type	Funding End Date	Speed Type Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	Transfer Status
1	100.000	11022108	05/31/2007	Physics	10	10180	11976					

Save | Return to Search | Notify | Refresh | Include History

Funding Distribution | Position and Incumbent Data

Step 9:

Click .

Make a note of the new position number. Your position is created and the position number is assigned

Approve the position and funding. (In the Practice Area, you are an approver. Depending on your security access in Production, you may or may not be an approver.)

Step 10:

Select **Position Approval** from the Navigation box on the left side of the screen – see below



Step 11:

On the Position Approval page select the following:

Position Status: (required)	Approved
Position Notes: (optional)	Approver may add to position comments entered by end-user

Step 12:

Compare your Position Approval page with the one shown below:

University of Colorado HR89P

Description Specific Information **Position Approval**

Save Return to Search Next in List Previous in List Refresh Update/Display Include History

Position Number: 00679961 [Go To Position Funding](#)

Headcount Status: Current Head Count: 0 out of 0

Find | View All First 1 of 1 Last

Short: Professor Essential Services

Long Description: Professor

Approval

Effective Date: 04/30/2007 Position Notes Reason Code: NEW New Posn Y

Status Date: 04/03/2007

'Position Status: Approved

Appr/Reject:

Save Return to Search Notify Refresh

Description | Specific Information | Position Approval

Step 13:

Click Save. Position is approved

Note:

A position must be approved before you can hire someone into the position.

Step 14:

Select **Funding Approval** from the navigation box on the left side of the screen.

On the Funding Approval page select the following:

Funding Status: (required)	Approved
Funding Notes: (optional)	Approver may add to funding comments entered by end-user

Step 15:

Compare your Funding Approval page with the one shown below:

University of Colorado

HR689PRAC PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Page

Funding Approval | Funding Distribution | Position and Incumbent Data

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Go To Position Data

Funding Find | View All First 1 of 1 Last

Position Number: 00679961 Sequence: 0 Entered Date: 04/03/2007

Find | View All First 1 of 1 Last

Funding Status: Approved Status Date: 04/03/2007

Funding Begin Date: 04/30/2007 Amt Pct Appr/Reject: Ruiz-Corchado, Julia

Distribution Customize | Find First 1 of 1 Last

Percent	Speed Type	Funding End Date	Speed Type Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	Transfer Status
1	100.000	11022108	05/31/2008	Physics	10	10180	11976				

Step 16:

Click  Save. Position funding is approved

Creating and approving a regular faculty position completed

Exercise 2 – Jobs at CU—Recruiting

Scenario: Jobs at CU is the university’s online recruiting system for managing job searches, and is independent of HRMS. The system is used by Department Recruiting Liaisons (DRLs) and campus HR offices to enter and track posting specific information and manage applications. Postings are created in Jobs at CU based on approved positions in HRMS which have been assigned the action of “REC”. Applicants use Jobs at CU to view and apply to University of Colorado job postings.

Note:

Check campus requirements for use of Jobs at CU and visit <https://www.cusys.edu/jobs/training.html> for more information.

Step 1:

Navigation: Organizational Development; Position Management; Maintain Positions/Budgets; Add/Update Positions; **Find Existing Value**

The screenshot shows the 'Add/Update Position Info' page in the University of Colorado Jobs at CU system. The page has a header with the University of Colorado logo and navigation links. Below the header, there is a section titled 'Add/Update Position Info' with instructions to enter information and click Search. There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search criteria section includes several fields with dropdown menus and input boxes: Position Number (begins with 679961), Description (begins with), Position Status (=), Business Unit (begins with), Department (begins with), Job Code (begins with), and Reports To Position Number (begins with). There is also a checkbox for 'Include History'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Enter position number and click 

Step 2:

Fields to populate:

Insert Row (required)	Click  to insert row
Effective Date defaults (required)	Leave as is or change as necessary
Choose Reason - REC	REC is Recruitment
Click 	
REC Must Be Approved	Once approved, position will feed to Jobs and CU

Step 3:

Compare Position Description page with one shown below.

The screenshot displays the University of Colorado HR system interface. At the top left is the University of Colorado logo. The top right shows the user's name 'HR29PRAC PRACT61 Home' and a 'New Win' button. Below the logo are three tabs: 'Description', 'Specific Information', and 'Position and Incumbent Data'. A toolbar contains buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Refresh', 'Update/Display', and 'Include History'. The main content area is titled 'Position Information' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. Below this is a 'Go To Position Funding' link and a '+' button. The 'Position Information' section contains the following fields: 'Position Number: 00679961 Professor', 'Headcount Status: [blank]', 'Current Head Count: 0 out of 0', 'Effective Date: 04/30/2007 [calendar icon] Position Notes', 'Status: Active [dropdown]', 'Reason: REC Recruitment', 'Action Date: 04/03/2007', 'Position Status: Proposed Status Date: 04/03/2007', and 'Ruiz-Corchado, Julia'. The 'Job Information' section includes: 'Business Unit: UCOLO University of Colorado', 'Job Code: 1101 Professor', 'Manager Level: [dropdown]', 'Reg/Temp: Regular [dropdown]', 'Full/Part Time: >= 50% [dropdown]', 'Regular Shift: N/A', 'Title: Professor', and 'Short Title: Professor Detailed Position Description'. The 'Work Location' section includes: 'Reg Region: USA United States', 'Department: 10180 Physics', and 'Company: CU University of Colorado'.

Position Information

Position Number: 00679961 Professor [Go To Position Funding](#)

Headcount Status: Current Head Count: 0 out of 0

Effective Date: 04/30/2007 Position Notes Status: Active

Reason: REC Recruitment Action Date: 04/03/2007

Position Status: Proposed Status Date: 04/03/2007 Ruiz-Corchado, Julia

Job Information

Business Unit: UCOLO University of Colorado

Job Code: 1101 Professor Manager Level: [dropdown]

Reg/Temp: Regular Full/Part Time: >= 50%

Regular Shift: N/A

Title: Professor Short Title: Professor [Detailed Position Description](#)

Work Location

Reg Region: USA United States

Department: 10180 Physics Company: CU University of Colorado

Jobs at CU Information Complete

Exercise 3 – Hiring and Approving a Regular Faculty Employee

Scenario: A candidate for the position has been selected and must now be hired.

Note:

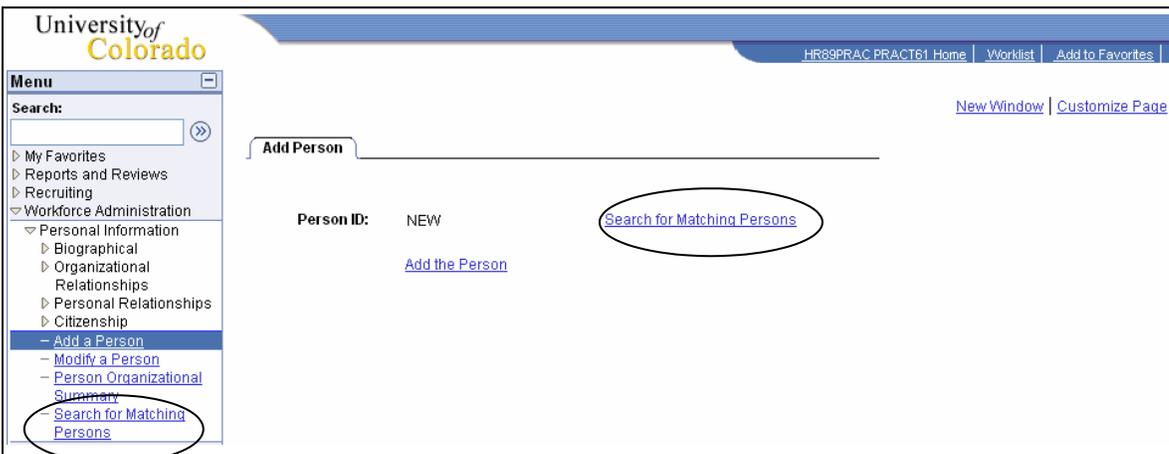
Campus processes are to be followed for actual dates of employment for Faculty (especially Contract Faculty). In most cases, academic and summer appointments have specific dates that are defined by each campus.

There are two different compensation frequencies used by the University for faculty. For payroll purposes both are paid on a monthly basis, but they are set up differently in the Hire/Job Data pages. They are:

- Contract Pay:** This pay frequency is commonly used for academic year faculty and is the one used for this exercise. For this pay frequency, the compensation amount entered is the total amount to be paid to the faculty member over a specified period of time, e.g. over the 9-month academic year. Contract pay is an effective way to pay an employee a pre-determined amount over a specified period of time.
- Monthly Pay:** This pay frequency is used for faculty members that work on a 12-month basis. For example, faculty in the Libraries and Medical School work year-round. Their work schedule is not necessarily tied to specific semester or academic year dates. The compensation amount is the monthly pay amount for the faculty member.

Step 1:

Navigation: Home; Workforce Administration; Personal Information; Add a Person; Search for Matching Persons



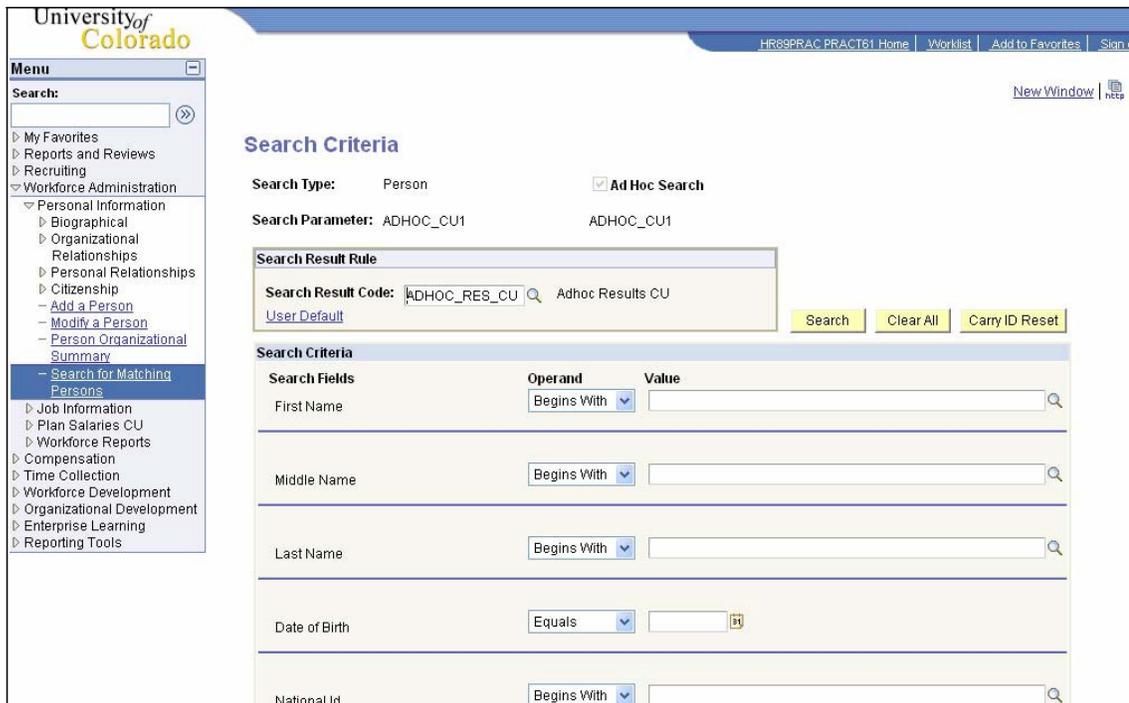
Step 2:

Search Criteria Page displays

Enter as many fields as available

Name fields are Case Sensitive

Click 



University of Colorado

HR89PRAC PRACT61 Home | Worklist | Add to Favorites | Sign out

Menu

Search:

My Favorites
Reports and Reviews
Recruiting
Workforce Administration

- Personal Information
 - Biographical
 - Organizational Relationships
 - Personal Relationships
 - Citizenship
 - Add a Person
 - Modify a Person
 - Person Organizational Summary
- Search for Matching Persons
- Job Information
- Plan Salaries CU
- Workforce Reports
- Compensation
- Time Collection
- Workforce Development
- Organizational Development
- Enterprise Learning
- Reporting Tools

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: ADHOC_CU1 ADHOC_CU1

Search Result Rule

Search Result Code: ADHOC_RES_CU1 Adhoc Results CU

User Default

Search Clear All Carry ID Reset

Search Fields	Operand	Value
First Name	Begins With	<input type="text"/>
Middle Name	Begins With	<input type="text"/>
Last Name	Begins With	<input type="text"/>
Date of Birth	Equals	<input type="text"/>
National Id	Begins With	<input type="text"/>

Step 3:

If person does not already exist in HRMS, begin the **Add a Person** process

If person does exist in HRMS, go to Add Employment Instance (Navigation: Home; Workforce Administration; Job Information; Add Employment Instance)

For this exercise, the candidate is NOT in HRMS

Navigation: Home; Workforce Administration; Personal Information; **Add a Person**

Step 4: Add a Person page displays



University of Colorado

HR89PRAC PRACT61 Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | Help

Add Person

Person ID: NEW [Search for Matching Persons](#)

[Add the Person](#)

Click: [Add the Person](#)

Step 5:

On Biographical Details page, enter or select the following:

Effective Date for Name (required)	Date defaults to today's (system) date. Leave as is or change to hire date or other appropriate date. This date cannot be future-dated. Generally, effective date is the date of hire; however, the official date of hire will be recorded in Job Data. Having an earlier (non-hire) date recorded in Personal Information and the true hire date recorded in Job Data, allows setting up pre-employment records for future employees.
--	---

Note:

The **Effective Date for Name** in Personal Information and the Hire Date in Job Data cannot be prior to the date you have created your position.

Step 6

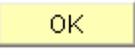
Click [Add Name](#)

Edit Name page displays:

Prefix: (optional)	Choose the appropriate value
First: (required)	New employee's first name
Middle: (required only if on SS card)	New employee's middle initial
Last: (required)	New employee's last name
Suffix: (optional)	Choose the appropriate value (If applicable)

Note:

The First, Middle and Last Name should be entered as it appears on the new employee's Social Security card.

Click  to return to Biographical Details page

Step 7:**Biographical Details page fields:**

Effective Date for Name: (required)	Date of hire
Format Type:	Defaults to English
Date of Birth (required)	Enter DOB
Gender: (required)	Select from drop down list
Highest Education Level: (optional)	Select from drop down list
Language Code: (optional)	Select from drop down list
Military Status: (optional)	Select from drop down list
Home Department: (required)	Use search icon if needed 
Campus Box: (required)	Use search icon if needed 
SSN/National ID (required)	Required for all hires or POI with Security Access

Step 8:

Compare your Biographical Details page with the one shown below:

University of Colorado HR89PRAC

Biographical Details | [Contact Information](#) | [Identity/Diversity](#) | [Organizational Relationships](#)

Person ID: NEW

Primary Name Find | View All | First 1 of 1 Last

'Eff Date for Name: 09/01/2007

'Format Type: English

Display Name: Faculty, Franklin A [Edit Name](#)

Biographic Information

'Date of Birth: 05/24/1963 43 Years 10 Months

Biographical History Find | View All | First 1 of 1 Last

'Effective Date for 09/01/2007

PERSONAL DATA:

Gender: Male

'Highest Education Level: A-Not Indicated

Language Code: English FERPA Flag

Military Status

Previous Non-Employee T-ID:

Home Department: 10180 Physics

Campus Box: 390 UCB Physics

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

Country	*National ID Type	National ID	Primary ID
USA	Social Security Number <input type="button" value="v"/>	193-56-7802	<input checked="" type="checkbox"/>

[Biographical Details](#) | [Contact Information](#) | [Identity/Diversity](#) | [Organizational Relationships](#)

Step 9:

Click [Contact Information](#) or use the Contact Information link at the bottom of the page

Contact Information page:

University of Colorado HR89F

Biographical Details | **Contact Information** | Identity/Diversity | Organizational Relationships

Emplid: NEW

Current Addresses Customize | Find | View All | First 1-2 of 2 Last

Address Type	As Of Date	Status	Address	
Home	09/01/2007			Add Address Detail
Mailing				Add Address Detail

Phone Information Customize | Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
Campus 1			<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 | Refresh | Update/Display

[Biographical Details](#) | [Contact Information](#) | [Identity/Diversity](#) | [Organizational Relationships](#)

Click Home [Add Address Detail](#)

Step 10:

Address History page displays

Click [Add Address](#)

University of Colorado HR89PRAC PRACT61 Home | Worklist

[New Window](#)

Address History

Address Type: Home

Address History Find | First 1 of 1 Last

*Effective Date	Country	*Status	Address:	
09/01/2007	USA	A		Add Address

OK | Cancel | Refresh

Step 11:
Edit Address page displays

Enter Address and click **OK** and then click **OK** again.

The screenshot shows the 'Edit Address' form on the University of Colorado website. The form is titled 'Edit Address' and contains the following fields:

- Country: United States
- Address 1: 456 Booker
- Address 2: (empty)
- City: Boulder
- State: CO
- Postal: 80302
- County: (empty)

 At the bottom of the form, there are two buttons: 'OK' and 'Cancel'. The browser's address bar shows 'HR69PRAC.PRACT61.Home' and there are links for 'Worklist', 'Add to Favorites', 'New Window', and 'Customize Page'.

Step 12:
Contact Information page re-displays

If Mailing address is different than Home address, click Mailing [Add Address Detail](#) and repeat steps 10 and 11

Contact Information Fields:

Phone Type: (optional)	Select the appropriate phone type. Enter the telephone number (Click  to add rows for additional phone #s)
Email Address(es): (optional)	Select the appropriate email Address type Enter the email address (Click  to add additional email addresses)

Notes:

- The Campus 1 phone # and the Campus email address are used for the campus phone directories (both online and hard-copy directories).
- When hiring a foreign student or employee, the home address must be the home address of their country of origin. The mailing address can be a local address.
- University uses mailing address for payroll advices, benefit information, W-2s and other employment related issues.

Step 13:

Compare Contact Information page with the one shown below.

University of Colorado

HR89PRAC PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Page

Biographical Details | **Contact Information** | Identity/Diversity | Organizational Relationships

Emplid: NEW

Current Addresses Customize | Find | View All | First 1-2 of 2 Last

Address Type	As Of Date	Status	Address	
Home	09/01/2007	A	456 Booker Boulder, CO 80303 USA	Edit/View Address Detail
Mailing	09/01/2007	A	If Mailing Addr differs from Home Addr Click ADD Address Detail	Add Address Detail

Phone Information Customize | Find | First 1-2 of 2 Last

Phone Type	Telephone	Extension	Preferred	
Campus 1	303/492-3210		<input type="checkbox"/>	+ -
Home	303/444-3210		<input checked="" type="checkbox"/>	+ -

Email Addresses Customize | Find | First 1 of 1 Last

Email Type	Email Address	Preferred	
Campus	frank.falculty@colorado.edu	<input type="checkbox"/>	+ -

Save | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

Biographical Details | Contact Information | Identity/Diversity | Organizational Relationships

Step 14:

Click [Identity/Diversity](#) or use the link at the bottom of the page

Ethnic Group: (required)	Select the appropriate ethnicity. Indicate which ethnic group is Primary Click <input type="checkbox"/> to add additional ethnic groups
Background Checks (optional)	Select checkboxes/enter dates that appropriate background checks were completed for this new hire

University of Colorado

HR89PRAC PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Page |

Biographical Details | Contact Information | **Identity/Diversity** | Organizational Relationships

Emplid: NEW

Ethnic Group Find | View All | First 1 of 1 Last

Ethnic Group: Primary

Employment Eligibility Proof

Soc. Sec. Card Copy Received	<input type="text"/>
I-9 Effective Date	<input type="text"/>
I-9 Expiration Date	<input type="text"/>
I-9 Verifier <input type="text"/> Name	

Background checks

<input type="checkbox"/> Criminal History Records	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Financial History Records	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Motor Vehicle Records	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Other Background Check	<input type="text"/>	<input type="checkbox"/>

Step 15:

Click [Organizational Relationships](#)

Organizational Relationships page displays.

Check Employee box

Click [Add JOB/Relationship Data](#) or [Save](#)

Step 16:

Work Location page displays

New Employee ID number is now assigned

Effective Date (required)	Enter Date of Hire
Action/Reason: Action of Hire (required) Reason (required)	Defaults to HIR. Leave as is Enter hire Reason from Look Up list
Position (required)	Enter Position number. Other fields will populate based on position number created in Exercise 1
Job Notes	<p>May be added on any page by clicking  Job Notes icon</p> <p>Notepad page displays</p> <p>Click: Add a New Note</p> <p>Enter note/comments</p> <p>Click: Save</p> <p>Click: Job Data Page to return to Work Location Page</p>

Step 17:

Compare your Work Location page with the one shown below:

University of Colorado
HR89PRAC PRACT61 Home | Worklist | Add to Favorites
New Window | Customize Page

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

Faculty, Franklin A EMP ID: 190075 Empl Rcd #: 0

Work Location Find | View All First 1 of 1 Last
Calculate Status and Dates

HR Status: Active Empl Status: Active
Effective Date: 09/01/2007 Sequence: 0 Job Notes
Action / Reason: Hire HIR New Hire Future

Position Number: 00679961 Professor Position Entry Date: 09/01/2007
Regulatory Region: USA United States Position Data
Company: CU University of Colorado Appointment End Date:
Business Unit: UCOLO University of Colorado
Department: 10180 Physics Department Entry Date: 09/01/2007
Location: 1DUAN Duane Phy & Astro, Gamow Twr
Establishment ID: CU University of Colorado
Last Updated by: Last Upd DtTm: 04/03/2007 9:41:57AM Date Created: 04/03/2007

Save Notify Previous tab Next tab Refresh Add

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

Step 18:

Click **Job Information** or use the Job Information link at the bottom of the page

Percent of Time and Standard Hours	Defaults from position data and can be updated. A change to either one updates the other
Reports to:	Defaults from Position Data
Employee Class	Defaults from Job Code upon Saving

Compare your **Job Information** page with the one shown below:

University of Colorado
HR89PRAC PRACT61 Home | Worklist | Add to Favorites
New Window | Customize Page

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

Faculty, Franklin A EMP ID: 190075 Empl Rcd #: 0

Job Information Find | View All First 1 of 1 Last

Effective Date: 09/01/2007 Sequence: 0 Job Notes Appr Status: Proposed 09/01/2007
Action / Reason: Hire New Hire Appr Reject

Job Code: 1101 Professor Entry Date: 09/01/2007

Reports To:
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: 0.000000 Adds to FTE Actual Count?

USA
FLSA Status: Exempt

Save Notify Previous tab Next tab Refresh Add

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

Step 19:

Click: [Payroll](#)

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.

Compare your Payroll page with the one shown below:

Step 20:

Click [Compensation](#)

Compensation page displays

Frequency (required)	C – defaults to Contract based on job code
Pay Components section (required)	Enter Rate Code – BASEC Enter Comp Rate - total amount paid over contract period
Click Calculate Compensation	MUST click Calculate Compensation before proceeding

Note:

The Comp **Frequency** is the frequency of pay (contract, monthly, hourly) that the employee was quoted in the offer and defaults based on the Job Code at the position level. There are a few cases where this may need to be changed. It is important that this field matches the actual pay (comp) frequency for the employee and that the Rate Code at the bottom of the page reflects the correct Base Rate Code for the Comp Frequency.

A reminder that this exercise is for a Contract Pay faculty. For information on a Monthly Pay faculty, SEE 12 MONTH FACULTY SECTION BEGINNING WITH STEP 28.

Step 21:

Compare your Compensation page with the one shown below:

University of Colorado
HR89PRAC PRACT61 Home | Worklist

Faculty, Franklin A EMP ID: 190075 Empl Rcd #: 0

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

Compensation Find | View All First 1 of 1 Last

Effective Date: 09/01/2007 Sequence: 0 Job Notes Appr Status: Proposed 09/01/2007
Action / Reason: Hire New Hire Appr/Reject: Future

Compensation Summary

Base Compensation Rate: 90,000.000000 *Frequency: C Contract **Contract Pay**
Total Compensation Rate: 90,000.000000

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

Comparative Information

Change Amount: 0.000000 USD Contract
Change Percent: 0.000

Pay Rates

Annual	90,000.000000	USD	Daily	USD
Monthly	USD	Hourly	43.269231	USD

Pay Components Customize | Find | First 1 of 1 Last

*Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEC	0	90,000.000000	USD	C

Calculate Compensation

Save Notify Previous tab Next tab Refresh Add

Step 22:

Click: **Contract Pay**

Contract Pay page displays.

Effective Date (required)	Enter date that is equal to the begin date of the contract period
Contract Pay Type (required)	Select appropriate Contract Pay Type from drop down menu.
Payment Terms Pay begin & end dates	Fields will populate based on Contract Pay Type

Step 23:

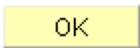
Compare your Contract Pay page to the one shown below:

Contract Pay

Contract Information		Find View All	First	1 of 1	Last
*Effective Date:	09/01/2007				
Contract Pay Type:	Faculty AY Pay Over 9 Months				
*Payment Term:	Pay Over Contract				
*Contract Begin Date:	09/01/2007	*Contract End Date:	05/31/2008		
Payment Begin Date:	09/01/2007	Payment End Date:	05/31/2008		
Actual Start Date:	09/01/2007	Actual Contract End Date:	05/31/2008		

OK Cancel Refresh

Click



Step 24:

Click [Employment Information](#) or use the Employment Information link at the bottom of the page

Employment Information page displays

Appointment End Date (optional)	Enter appointment end date, if applicable
---	---

Notes:

Funding for the position must cover the full length of the Faculty appointment. If you enter an Appointment End Date, check to make sure the Funding End Date is equal to, or exceeds the length of the appointment. Review your campus processes regarding whether to record a date in the Appointment End Date field. **It is required on all campuses for student job codes.** For student employees, the appointment end date is frequently the same as the semester end date.

Step 25:

Compare your Employment Information page with the one shown below:

The screenshot shows the 'University of Colorado' HR system interface. The top navigation bar includes 'HR89PRAC PRACT61 Home' and 'Worklist'. The main content area is titled 'Employment Information' and displays details for 'Faculty, Franklin A' with ID '190075' and 'Empl Rcd #' '0'. Below this, there are fields for 'Empl Rcd:', 'Univ Employment Date:', 'Last Start Date:', and 'Termination Date:'. A section titled 'Empl Record' contains fields for 'Class Staff Seniority Date:', 'Class Staff Save Pay End Date:', 'Business Title:' (set to 'Professor'), 'Classified Staff LOS:', 'Job Code Entry Date:', and 'Classified Staff Certification Date:'. The 'USA' section includes '12 Month Faculty' (checkbox), 'Appointment End Date:', 'Contract Length:' (set to 'Not Applicable'), 'Accrue Tenure Services' (checkbox), 'Service Calculation Group:', 'FTE for Tenure Accrual:', and 'FTE for Flex Service Accrual:'. At the bottom, there are buttons for 'Save', 'Notify', 'Previous tab', 'Next tab', 'Refresh', and 'Add'.

Step 26:

Click: . Make note of the new employee's ID number, if not done so already.

For new hires, system automatically transfers to **Emergency Contact page**.

Step 27:

Enter Contact Name & Relationship to Employee

Identify Primary Contact

If contact has same address and phone number as employee, check those boxes

If contact has other address, click  to insert a new row and then click [Edit Address](#)

Note that multiple emergency contacts can be designated by inserting rows.

Additional phone numbers can be entered on [Other Phone Numbers](#) page.

Emergency Contact Information Page:

University of Colorado

HR89PRAC PRACT61 Home | Worklist | Add to Favorites

Contact Address/Phone | **Other Phone Numbers**

Faculty, Franklin A **Emplid:** 189955

Emergency Contact Find | View All First 1 of 1 Last

'Contact Name: Fredrick Faculty

'Relationship to Employee: Brother Primary Contact

Same Address as Employee Address Type: Home

[Return to Personal Data](#) Same Phone as Employee Phone Type: Campus 1

Employee's Current Address

Country: USA United States

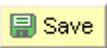
Address: 456 Booker
Boulder, CO 80302

Employee's Phone

Phone: 303/492-6543

Save Return to Search Notify

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

Click: 

*For Contract faculty, skip to Step 29.

***Step 28:**

*** Twelve month appointments for faculty (typically for HSC faculty at UCDHSC or library faculty):**
Twelve month faculty employees are NOT set up for contract Pay in HRMS because they have no academic year.

On the Contract Pay page:

Frequency (required)	Change the frequency to "M"
Rate Code (required)	Choose BASEM from drop down menu.
Comp Rate (required)	Enter monthly salary

Click 

Compensation Page:

University of Colorado HR89PRAC PRACT61 Home

Compensation Summary

Base Compensation Rate: 7,500.000000 *Frequency: Monthly
 Total Compensation Rate: 7,500.000000

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

Comparative Information

Change Amount: 0.000000 USD Monthly
 Change Percent: 0.000

Pay Rates

Annual	90,000.000000 USD	Daily	346.153846 USD
Monthly	7,500.000000 USD	Hourly	43.269231 USD

Pay Components Customize | Find | First 1 of 1 Last

Amounts

Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEM <input type="text"/>	0	7,500.000000 <input type="text"/>	USD	M

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

Click [Employment Information](#) or use the Employment Information link at the bottom of the page

Employment Information page displays

Click the 12 Month Faculty checkbox - required. This will allow HRMS to add sick/vacation accruals each month. Exception reporting will be entered by the department PPL.

Employment Information page:

University of Colorado HR89PRAC PRACT61 Home | Worklist | Add to Favorites

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

Faculty, Franklin A EMP ID: 189955 Empl Rcd #: 0

Empl Rcd: 0 Univ Employment Date:
 Last Start Date:
 Termination Date: Service Dt:

Empl Record

	Years	Months	Days
Class Staff Seniority Date:	0	0	0
Class Staff Save Pay End Date:	0	0	0

Business Title: Professor Classified Staff LOS:
 Job Code Entry Date:

USA **12 Month Faculty**

Appointment End Date: Contract Length:
 Accrue Tenure Services FTE for Tenure Accrual:
 Service Calculation Group: FTE for Flex Service Accrual:

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

Click:

Make a note of the professor's employee ID (EmplID) number

Approving the Hire. (In the Practice Area, you are the approver. Depending on your security access in Production, you may or may not be an approver.)

Step 29:

Navigate to the **Job Approval** page using the navigation window on the left.

Step 30:

On the Job Approval page, enter or select the following:

Approval Status: (required)	Approved
Job Notes: (optional)	Approver may add to hire comments entered by end-user

Step 31:

Compare your Job Approval page with the one shown below:

Step 32:

Click . The professor has been hired

Hiring a regular faculty employee and approving the hire completed

Exercise 4 – Recording and Approving Regular Faculty Employee Termination at End of Academic Year Contract

Scenario: The professor has completed his contract and has decided to resign from CU. Your job is to record the termination.

Note:

For employees using Contract Pay compensation frequency: Changing employee contract pay types, making salary changes, and/or terminating anytime prior to the contract end date has a direct and immediate impact on the employee's pay. When changes are made, a contract pay adjustment must be made in order to ensure the employee is paid correctly. For more information about Contract Pay and making changes to existing contracts, refer to the PBS website at <http://www.cusys.edu/pbs/hrms/training/resources.html>, Training Resources / Contract Pay Reference Guide and Contract Changes.

Step 1: Navigation: Home; Workforce Administration; Job Information; Job Data

The screenshot shows the University of Colorado HRMS interface. On the left is a 'Menu' with a search box and a tree view. The 'Job Information' section is expanded, and 'Job Data' is selected. The main area is titled 'Job Data' and contains the text: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a section titled 'Find an Existing Value' with several search criteria:

- EmpID:** begins with [dropdown] 190075
- Empl Rcd Nbr:** = [dropdown]
- Name:** begins with [dropdown]
- Last Name:** begins with [dropdown]
- Department:** begins with [dropdown]
- Last 4 SSN:** begins with [dropdown]
- HR Status:** = [dropdown]
- Employee Status:** = [dropdown]

 There is a checked checkbox for 'Include History'. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step 2:

On the Job Data - Find an Existing Value search page, enter the following:

<p>EmpID: (required)</p>	<p>Enter the professor's EmpID. You can also search by Name or Last Name</p>
-------------------------------------	---

Click **Search**

Step 3:

On the Work Location page, enter the following:

Insert a Row: (required)	Click  to insert a row
Effective Date: (required)	06/01/2008 May 31, 2007 is the professor's contract end date; therefore the termination date is June 1, 2007
Action: (required)	Termination
Reason: (required)	RES (Resignation)
Comments: (optional)	Record any comments relative to the termination

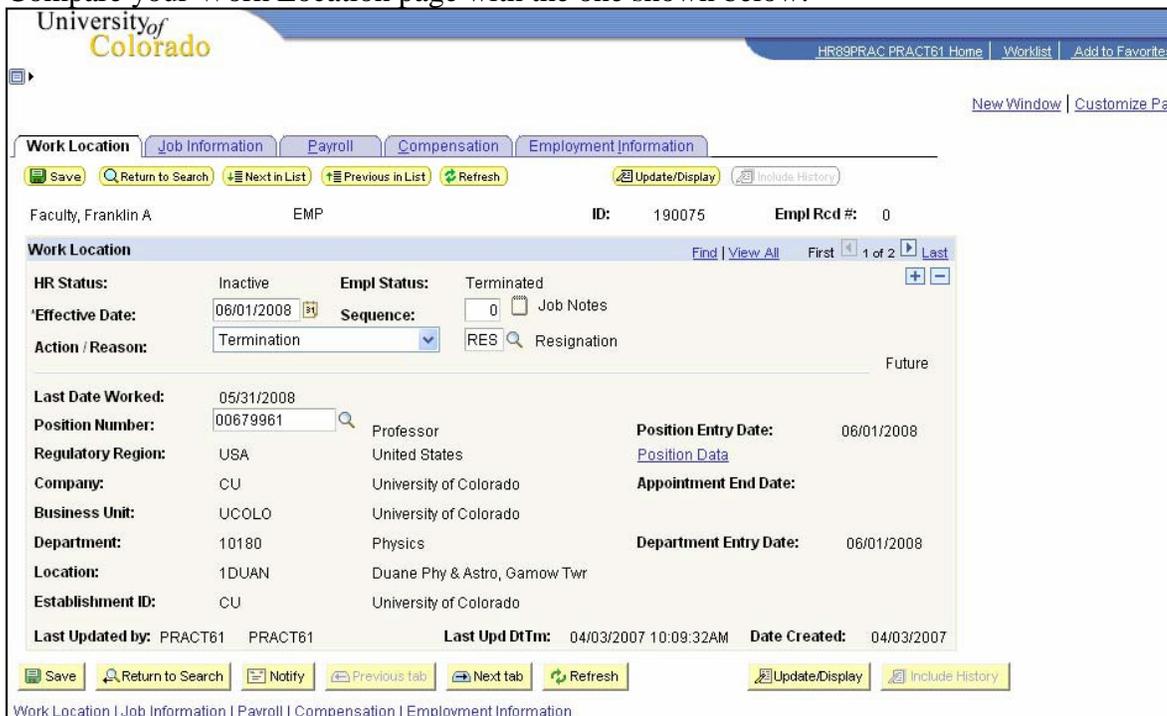
Note:

The effective date of the termination is the first day the employee no longer works for the university.

Example: If the last day to work is Friday August 10, 2007, then the effective date of the termination is Saturday, August 11, 2007.

Step 4:

Compare your Work Location page with the one shown below:



University of Colorado

HR89PRAC.PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Page

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

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Faculty, Franklin A EMP ID: 190075 Empl Rcd #: 0

Work Location Find | View All First 1 of 2 Last

HR Status: Inactive Empl Status: Terminated

Effective Date: 06/01/2008 Sequence: 0 Job Notes

Action / Reason: Termination RES Resignation

Future

Last Date Worked: 05/31/2008

Position Number: 00679961 Professor Position Entry Date: 06/01/2008

Regulatory Region: USA United States Position Data

Company: CU University of Colorado Appointment End Date:

Business Unit: UCOLO University of Colorado

Department: 10180 Physics Department Entry Date: 06/01/2008

Location: 1DUAN Duane Phy & Astro, Gamow Twr

Establishment ID: CU University of Colorado

Last Updated by: PRACT61 PRACT61 Last Upd Dtm: 04/03/2007 10:09:32AM Date Created: 04/03/2007

Save | Return to Search | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

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

Step 5:

Click 

Approve the termination. (In the Practice Area, you are an approver. Depending on your security access in Production, you may or may not be an approver.)

Notes:

Certain Action/Reason combinations **do not require** Job Approval for the termination; the system automatically approves the action/reason

For purposes of this exercise, let's assume that Termination/RES requires Job Approval, even though it does not

Step 6:

Navigate to **Job Approval** using the left hand navigation menu.

Step 7:

On the Job Approval page, enter the following:

Approval Status: (required)	Approved
Job Notes: (optional)	Choice (Approver may add to termination comments entered by end-user)

Step 8:

Click 

Step 9:

Compare your Job Approval page with the one shown below:

Terminating the professor completed

End of Life Cycle Exercise for a Regular Faculty Employee