University of Colorado
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EMPLOYEE SERVICES

Life Cycle Exercises Research Faculty Member

Create and Approve a Position
Jobs at CU—Recruiting
Hire
Record Sick Leave in Time Collection
Terminate

Professional Research Assistant

page intentionally left blank

Life Cycle of a Research Faculty Member – Professional Research Assistant

This group of exercises will follow the life cycle of a Professional Research Assistant (PRA) from position creation through termination. We will work with a PRA in the School of Medicine – Adult Clinical Research Center.

Create and Approve a Position
Record Open Position in Jobs at CU
Hire
Record Sick Leave in Time Collection
Terminate

Notes:
These exercises are for use in the HRMS Practice Area database during classroom training only. In order to complete the sick leave entry in Time Collection, **you will need to date the position and the hire prior to the monthly Time Collection pay period end date that is pre-set in this practice area database**. Ask your instructor for the pay period end date and date your position and hire accordingly. If you choose not to do the time collection exercise, you may date the position and hire date with any date.

Exercise 1 – Create and Approve a Professional Research Assistant (PRA) Position

Scenario: Create and approve the PRA position.

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

Step 2:

On the Description page, enter the following:

Effective Date: (required)	**Enter the date you want the position available.** Date must be on or prior to the date of hire for the new PRA
Job Code: (required)	**1310** (Professional Research Assistant)
Department: (required)	**20234** (SOM-Adult Clinical Rsrch Cntr)
Location Code (required)	**2UD** Defaults from Department. May be changed if necessary
Reports To: (required for classified employees)	**Select the position # of the supervisor/evaluator for this PRA position.** In the practice area, there may not be an appropriate position to use for your PRA; just pick a position of your choice from the list
Position Notes: (optional)	**Comments 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 upon saving.

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:

| Description | Specific Information | Position and Incumbent Data |

💾 Save   🔄 Refresh   🗐 Update/Display   🗐 Include History

Position Information   Find | View All   First ◄ 1 of 1 ► Las

Position Number: 00000000   Professional Research Asst   Go To Position Funding

Headcount Status: **Current Head Count:**   0 out of   0

*Effective Date: 03/01/2007 📅   Position Notes   *Status: Active ▾   Initialize

*Reason: NEW 🔍   New Position   **Action Date:**   03/06/2007

Position Status: Proposed   **Status Date:**   03/01/2007

Job Information

*Business Unit: UCOLO 🔍   University of Colorado

Job Code: 1310 🔍   Professional Research Asst   **Manager Level:**   Non-Manager ▾

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

Regular Shift: N/A

Title: Professional Research Asst   **Short Title:**   PRA   Detailed Position Description

Work Location

*Reg Region: USA 🔍   United States

Department: 20234 🔍   SOM-Adult Clinical Rsrch Cntr   **Company:**   CU   University of Colorado

Location: 2UH 🔍   University Hospital

Reports To: 🔍   **Appointing Authority:**   🔍

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

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

Faculty/Exempt Professional - Proposed Costs

	Minimum	Maximum
Salary Range:		
Start Up Cost:		
Moving Expense:		
Total:		

Salary Plan Information

FTE: **Percent of Time:**   100.00

Salary Admin Plan: 130   **Grade:**   130

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   🗐 Inc

Description | Specific Information | Position and Incumbent Data

Step 4:

Click [Specific Information] or use Specific Information link at bottom of 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. Most PRAs are paid on a monthly, salaried basis, but can be changed if needed
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:

Step 6:

Click: [Save] **System assigns new position number; make note of position number**

Notes:

Position notes (comments) may be entered after saving.

[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	**Defaults to ON"** Change to **AMT** if salary is recorded by estimated amount instead of percent
Distribution Row 1 Percent: (required)	**75.00**
SpeedType: (required)	**61011113** (SOM Stdnt Divrst Fund)
Funding End Date: (optional)	**If left blank, funding is continuous.** Check campus requirements for use of this field relative to EE group
Distribution Row 2	**Click ⊞ to insert a new distribution row.** Be sure to click the ⊞ sign that is located in the **Distribution** section, not the Funding section
Percent: (required)	**25.00**
SpeedType: (required)	**61023985** (Admissions Gen Exp)
Funding End Date: (optional)	**If left blank, funding is continuous.** 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 does NOT stop pay. Payroll expense will be recorded in **Suspense** SpeedType instead of departmental SpeedType 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 below. Your page may differ from the one shown here because Funding Begin and End Dates may differ.

Step 9:
Click (Save).
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. If you have entered comments, your page may differ from the one shown here:

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 position comments entered by end-user**

Step 15:

Compare your Funding Approval page with the one shown below:

Step 16:
Click . Position funding is approved

Creating and approving a research 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 for more information.

Step 1:
Navigation: Home; Organizational Development; Position Management; Maintain Positions/Budgets; Add/Update Positions**; Find Existing Value**

Enter position number and click   Search

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**
Save	
REC Must Be Approved	**Once approved, position will feed to Jobs and CU**

Step 3:

Compare Position Description page with one shown below.

Jobs at CU Information Complete

Exercise 3 – Hiring and Approving a Research Faculty Employee

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

Step 1:
First, Search for Matching Persons to determine whether or not candidate already exists in HRMS.
Navigation: 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 **Search**
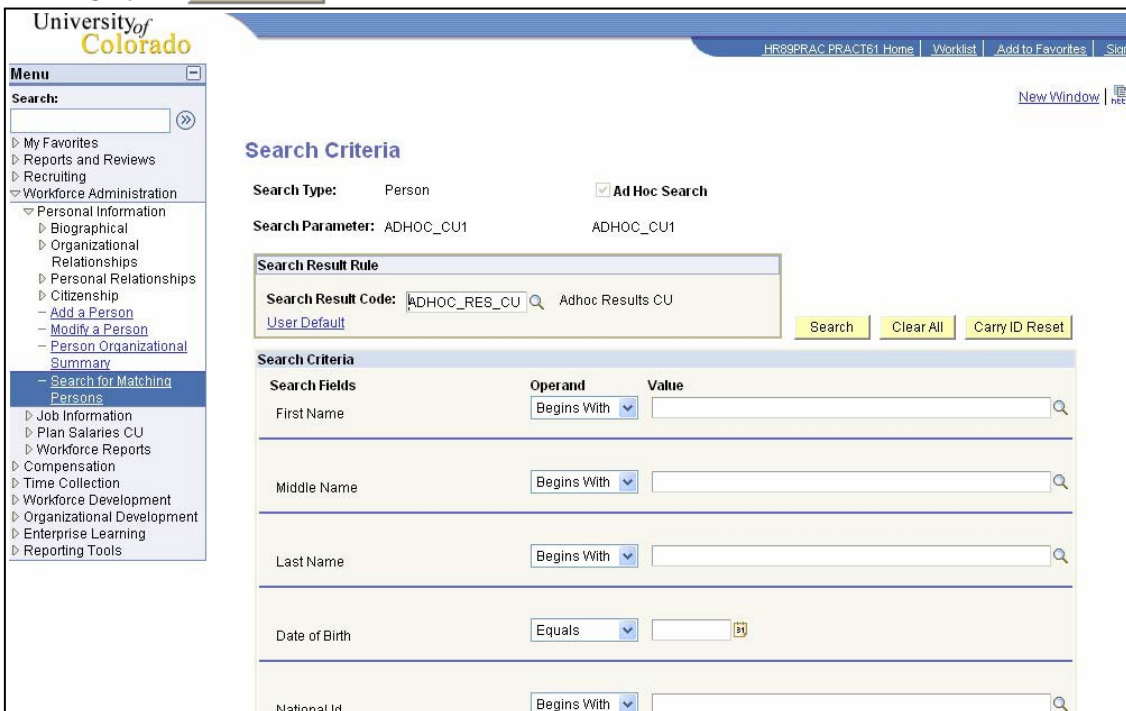
Step 3:

If person does not already exist in HRMS, begin the **Add a Person** process
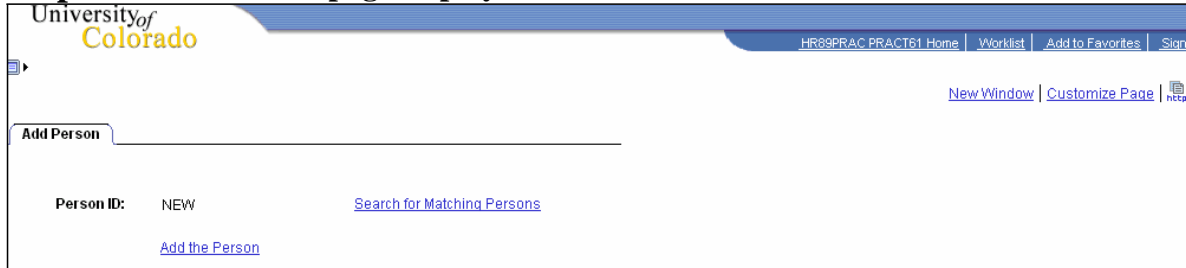
If person does exist in HRMS, go to Add Employment Instance (Navigation: Home: Workforce Administration; Job Information; Add Employment Instance)

For this exercise, the candidate is NOT in HRMS

Begin the **Add a Person** process

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

Step 4: Add a Person page displays

University*of*
Colorado

New Window | Customize Page | 🗋

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.

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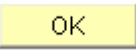
The **Effective Date for Name** in Personal Information and the Hire Date in Job Data cannot be prior to the date you have created your position.

If you plan to do the time collection exercise in this HRMS practice area database, the hire date must be prior to the current monthly pay period end date. Check with the classroom instructor for this date.

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**

Click ⬚OK⬚ **to**
    return to Biographical
    Details page	

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

Step 7:
Biographical Details page fields:

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:

Step 9:

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

Click Home [Add Address Detail]

Step 10:

Address History page displays

      Click Add Address

Step 11:

Edit Address page displays

      Enter Address and click OK and then click OK again.

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 the mailing address for payroll advices, benefit information, W-2's and other employment related issues.

Step 13:
Compare your Contact Information page with the one shown below:

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 (Use 🔍 for options) (Click ➕ to add additional ethnic groups)
Background Checks (optional)	**Select checkboxes/enter dates that appropriate background checks were completed for this new hire**

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	**May be added on any page by clicking** 📋 Job Notes **icon** Notepad page displays Click: Add a New Note Enter note/comments Click: Save Click: Job Data Page to return to Work Location Page

Step 17:

Compare your Work Location page with the one shown below:

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:

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	Verify that M (monthly) has defaulted
Pay Components section	**Enter:** Rate Code **BASEM** **Enter:** Monthly Comp Rate (dollar amount of monthly pay)
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.

Step 21:
Compare your Compensation page with the one shown below:

Step 22:
Click **Employment Information** or use the Employment Information link at the bottom of the page

Employment Information page displays

Appointment End Date (optional)	Date the PRA's appointment ends

Notes:
Funding for the position must cover the full length of the PRA's 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.

Employment Information page:

Compare your Employment Information page with the one shown below:

Step 23:
Review and Save

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

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 page:

Step 24:

Review and [Save].

  Make a note of the PRA'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 25:

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

Step 26:
This will bring up the Job Approval search page:

Enter Employee ID and click [Search]

On the Job Approval page, enter the following:

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

Step 27:
Compare your Job Approval page with the one shown below:

Step 28:

Click [Save]. The PRA has been hired and approved.

Hire New Research Faculty Member and Approving the Hire completed

Exercise 4 – Entering and Approving Sick Leave for a Research Faculty Employee

Scenario: PRA has turned in monthly employee work record to department payroll personnel liaison (PPL). Now, acting as the PPL, enter employee's sick leave into Time Collection.

Step 1:
 Navigation: Home; Time Collection; Batches; __Batch Header__
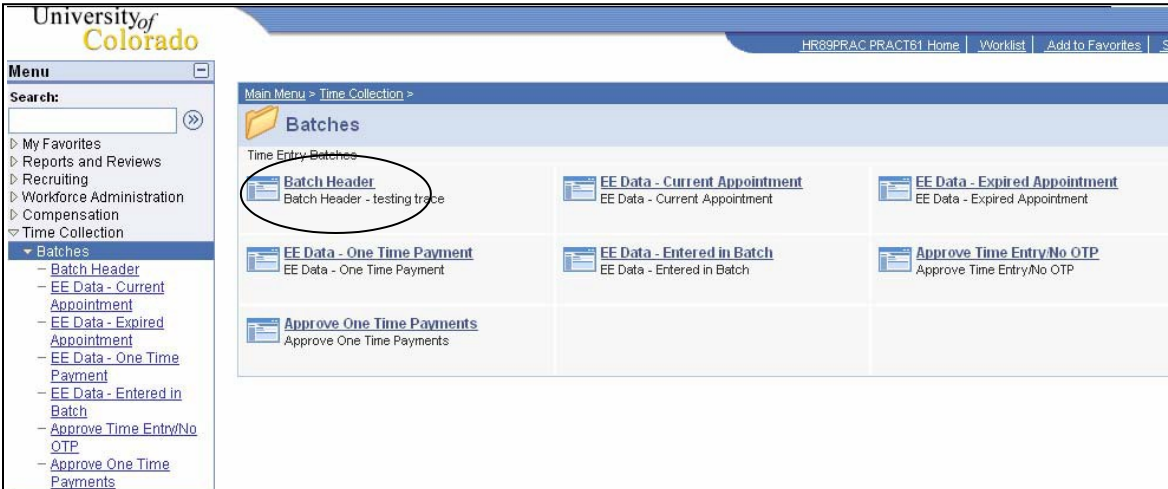
Step 2:
Batch Header (Header Control) page displays
> Click: Add a New Value

Pay Group: (required)	MON (Monthly Pay Group)
Batch ID: (required)	Three alpha/numeric characters to identify the batch
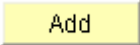
Notes:
   Batch IDs may be reused from pay period to pay period.
   Different Batch IDs must be used to create multiple batches in the same pay group and within the same pay period.

Step 3:

Click: [Add]

> **Batch Header page displays**

Description: (optional)	Enter something that will remind you of this batch
Batch Status	**Defaults as Open. Leave as is**

Click [Save]

Step 4:

Compare your Batch Header page with the one shown below:
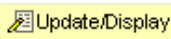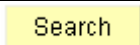
Step 5:

Navigate to the **EE Data-Current Appointment** page using the left-hand navigation menu.

EE Data search page displays

On this EE Data – Current Appointment search page, enter the following:

Pay Group: (required)	Defaults to MON. Leave as is
Batch ID: (required)	**Defaults to the Batch ID entered**
Employee ID	**Enter Employee ID #. May also enter Department and any other search categories**
Click [Search]	

Note:

If you have only a few employees to enter into a batch you should search by Employee ID # (EmplID). If you search by Name, Last Name or % Sign, you must also enter your department number. If you enter time records for multiple departments, you can enter data for only one department at a time.

EE Data – Current Appointment Search Page:

Step 6:
Time Entry Data page displays

Earnings Code: (required)	SCK (Sick Leave)
Hours: (required)	**3:** Indicates employee took 3 hours of sick leave

Notes:

Enter leave hours taken as a positive #

Enter leave balance adjustments as either a positive # (increase accrual balance) or negative # (decrease accrual balance)

To add additional earnings code(s), click ⊞

Click 💾 Save

Note:

In the Practice Area, there are no vacation and sick balances. Therefore, for this exercise and the entry of 3 hours sick leave, the system will, **upon saving,** convert the leave to a sick leave dock (SDK, -3.0 hours). For employees with adequate vacation and sick balances in HRMS Production, entries will not convert to docks.

Step 7:
Compare your Time Entry Data – EE Current Appointment page with the one shown below:

Note:

To access other employees when using a search list, use icons:

- **Return to Search** returns to the search page
- **Next in List** displays next employee in the list
- **Previous in List** displays previous employee in the list

Step 8:
Without canceling out of the current page select: **Batch Header**

Step 9:
On the Batch Header page, enter the following:

Batch Status: (required)	**Ready** (Click the Ready radio button)

Step 10:
Compare your Batch Header page with the one shown above.
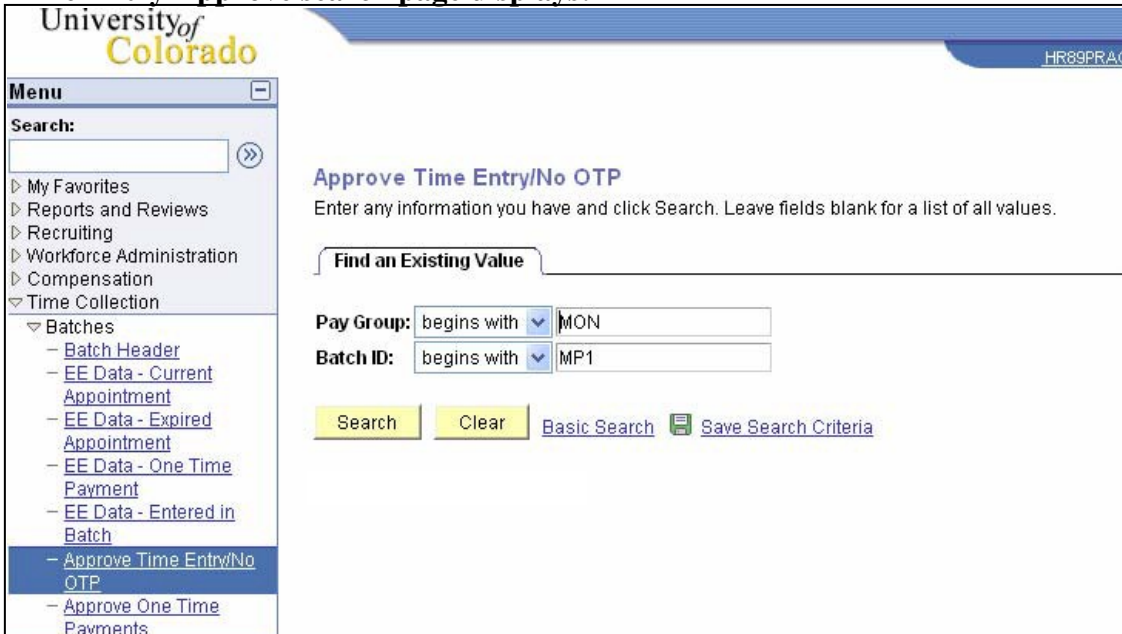
Click [💾 Save]

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

Step 11:
Navigate to the **Approve Time Entry/No OTP** page using the left-hand navigation menu.

Time Entry Approve search page displays:

Pay Group and Batch ID default

Step 12:
On the Approve Time Entry/No OTP page, enter the following:

TE Magnifying Glass: 🔍 (optional)	**Click on the magnifying glass (located next to the employee's name) to view <u>Employee Time Detail</u> entered for that employee**
Approved By Checkbox: (required)	**Click on the Approved By Checkbox after confirming that all EE data for your batch is recorded and accurate**

Time Entry Approval:

Notes:
A reminder that in this exercise, the PRA's sick leave was converted to a sick dock because there is no accrual balances for employees in the Practice Area.

After you have approved and saved your batch, the checkbox for each EE will change from unchecked to checked, indicating that each EE in this batch is approved.

Step 13:

Click **Save**

Creating and approving a monthly time collection batch completed

Additional Notes:

EE Data-Current Appointment: A current appointment implies the employee status is Active and the Appointment End Date is later than the beginning date of the current pay period.

EE Data-Expired Appointment: The employee status is Terminated or On Leave and the Appointment End Date is prior to the beginning date of the current pay period.

Entering data: If you have only a few employees to enter into a batch, search by Employee ID # (EmplID). If you search by Name, Last Name, or % Sign, you must also enter your department number. If you enter time records for multiple departments, you can enter data for only one department at a time.

Active Appointments: If there is only one active empl rcd [employee record] within your row-level security for the employee, the system will take you directly to that record. If the employee has more than one active empl rcd within your row-level security, it will display all of them, and you must select the appropriate one for which you wish to enter leave.

SpeedType: This field is for changing/overriding (for the current pay period only) the SpeedType(s) recorded on the position's funding distribution page.

Override Rate: Use this field to enter hours at a different hourly rate to be paid (for the current pay period only). Offline authorization is required for use of the override rate field.

Exercise 5 – Recording and Approving Research Faculty Employee Termination

Scenario: The PRA's job appointment has ended. His/her last day to work is **(Your Choice)**. Your goal is to record the termination.

Step 1. Navigation: Home; Workforce Administration; Job Information; Job Data; **Find an Existing Value**
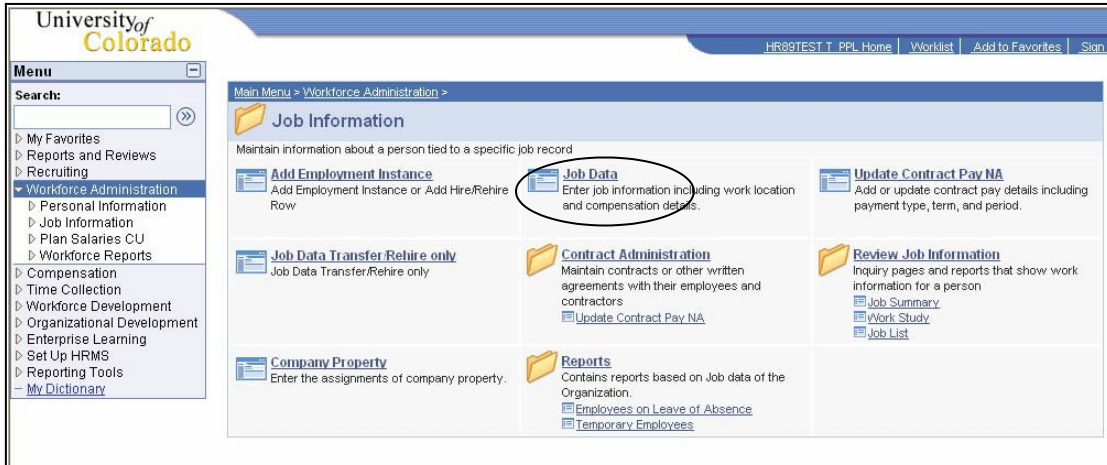
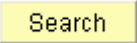**Step 2.** **Job Data search page displays**

Enter one or more of the search fields

EmplID: (required)	**Enter the PRA's EmplID** (You can also search by Name or Last Name)

Compare your Job Data search page with the one shown above. Your page may differ from one shown here:

Step 3:

Click

Step 4:

On the Work Location page, enter the following:

Insert a Row: (required)	Click to insert a row
Effective Date: (required)	**Termination Date**, *which is first day employee no longer works for the university in this job*
Action: (required)	**Termination**
Reason: (required)	**END (End of Appointment)**
Job Notes: (optional)	**Record any comments relative to the termination**

Note:
   <u>**The effective date of the termination is the first day the employee no longer works for the university**</u>.
   Example: If the last day to work is Friday, March 16, 2007, then the effective date of the termination is Saturday, March 17, 2007.

Step 5:
Compare your Work Location page with the one shown below:

Step 6:
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/END requires Job Approval, even though it does not.

Step 7:
Navigate to **Job Approval** using the left hand navigation menu.

Step 8:
On the Job Approval page, enter the following:

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

Step 10:

Click ![Save button]

Step 11:
Compare your Job Approval page with the one shown below:

Terminating the PRA completed

End of Life Cycle Exercise for a Research Faculty Employee