



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

Life Cycle Exercises

Student Faculty Member

Create and Approve a Position

Hire

Change in Salary

Terminate

Teaching Assistant

page intentionally left blank

Life Cycle of a Student Faculty Employee – Teaching Assistant

This exercise follows the life cycle of a Teaching Assistant (TA) from position creation through termination. A graduate degree student will work part-time while in graduate school by assisting a faculty member in the classroom. This Teaching Assistant works in the School of Law.

Create and Approve a Position

Hire

Change in Salary

Terminate

Notes:

These exercises are for use in the HRMS Practice Area database during classroom training only.

These exercises do not include any offline processes required on your campus to create or hire a TA. Check with your appropriate campus office for specific offline process requirements.

Exercise 1 – Create and Approve a Teaching Assistant Position

Scenario: Create and approve the TA position.

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

University of Colorado

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 [dropdown] [input]
Description: begins with [dropdown] [input]
Position Status: = [dropdown] [input]
Business Unit: begins with [dropdown] [input] [magnifying glass]
Department: begins with [dropdown] [input]
Job Code: begins with [dropdown] [input] [magnifying glass]
Reports To Position Number: begins with [dropdown] [input]

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 the position becomes available. Date must be on or prior to the date of hire for your new student employee
Job Code: (required)	1605 (Teaching Assistant)
Department (required)	10352 (School of Law)
Location Code (required)	1LAW Defaults from Department. May be changed if necessary
Reports To: (required for classified employees)	Enter position # of supervisor/evaluator for this position. In the practice area, there may not be an appropriate position to use for the teaching assistant; pick any position number from the list
Position Notes: (optional)	May be entered only after position has been saved

Notes:

Appointing Authority field is not required, use if desired.

The 7 Checkboxes are informational only; use if applicable.

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.

HRMS uses auto-numbering to assign numbers to positions and employees. The system will assign the next available number upon saving.

Step 3:

Compare your Description page with the one shown below.

The screenshot displays the University of Colorado HR system interface. At the top, the University of Colorado logo is on the left, and navigation links like 'HR&PRAC PRACT61 Home', 'Worklist', and 'Add to Favorites' are on the right. Below the header, there are tabs for 'Description', 'Specific Information', and 'Position and Incumbent Data'. The 'Position and Incumbent Data' tab is active, showing various fields for a 'Teaching Assistant' position. Key fields include Position Number (00000000), Headcount Status (0 out of 0), Effective Date (08/01/2007), Reason (NEW - New Position), Status (Active), Action Date (04/04/2007), Job Code (1506), Manager Level (Non-Manager), Full/Part Time (>= 50%), Regular Shift (N/A), Title (Teaching Assistant), Short Title (Teach Asst), Reg Region (USA), Department (10352 - School of Law), Location (1WLAW - Wolf Law Building), and Company (CU - University of Colorado). There are also checkboxes for various appointment types and a salary plan information section with fields for FTE, Salary Admin Plan, Standard Hours, and Work Period. The interface includes buttons for Save, Refresh, Update/Display, and Include History.

Step 4:

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

Step 5:

On the 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	Leave as is. These two fields default based on the Job Code
Background Checks (optional)	Select appropriate check boxes, if applicable
HIPAA 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 Description page.
The Calc Group (Flex Service) and Academic Rank fields are not used at CU at this time.

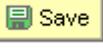
Step 6:

Compare your Specific Information page with the one shown below:

The screenshot displays the 'Specific Information' page for a position with the following details:

- Position Number:** 00000000 Teaching Assistant
- Headcount Status:** Current Head Count: 0 out of 0
- Effective Date:** 08/01/2007
- Status:** Active
- Max Head Count:** 1
- Wrks Comp:** College/Prof/Teach/Clerical
- Pay Group:** MON Monthly Employee
- Employee Type:** Salaried
- Background Checks:**
 - Criminal History Records
 - Financial History Records
 - Motor Vehicle Records
 - Other Background Check
- Incumbents:**
 - Update Incumbents
 - Include Salary Plan/Grade
- Budgeted Position:**
- Confidential Position:**
- Job Sharing Permitted:**
- Education and Government:**
 - Classified Indicator:** Std 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 Mats/Human Blood or Bodily: Yes No

Step 7:

Click  Save

System assigns new position number

Position Notes may be entered after saving

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

Note:

[Position and Incumbent Data](#) Summary information populated when position is filled.

Step 8:

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
Percent	100%
SpeedType (required)	11023198 (Trial Advocacy Prgms) FOPPS will display after tabbing
Funding End Date (required for student employees)	Enter appropriate semester end date for student position
Funding Notes (optional)	Record comments relative to funding for 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.

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

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

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

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

Both funding and position require approval.

Step 9:

Compare Funding Distribution Page with one shown below:

University of Colorado

HR89PRAC_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: 00679962 Sequence: 0 Entered Date: 04/04/2007

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

Funding Begin Date: 08/01/2007 Amt Pct Appr/Reject:

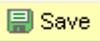
Distribution Find View All First 1 of 1 Last

	*Percent	*Speed Type	Funding End Date	SpeedType Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	Transfer Status
1	100.000	11023198	05/31/2007	Trial Advocacy Prgms	10	10352	14675					

Save Return to Search Notify Refresh Include History

Funding Distribution | Position and Incumbent Data

Click



Approve Position and Funding: In Practice Area, you are the approver. Access to Approval depends on level of security. You may or may not be an approver in Production.

Step 10:

Select **Position Approval** from the Navigation box on the left side of the screen.

University of Colorado

Menu

Search:

- My Favorites
- Reports and Reviews
- Recruiting
- Workforce Administration
- Compensation
- Time Collection
- Workforce Development
- Organizational Development
 - Position Management
 - Maintain
 - Positions/Budgets
 - Add/Update Position Info
 - Funding Distribution
 - Position Transfer only
 - Position Approval
 - Funding Approval
 - PET/Retroactive Funding Change
 - Correction PET
 - PET Approval
 - PET Approval (Sponsored Proj)
 - PET Certification
 - PET Cancellation
- Review Position/Budget Info

Step 11:

On the Position Approval page select the following:

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

Step 12:

Compare your Position Approval page with the one shown below. If you have entered Position Notes, your page may differ from the one shown here:

The screenshot displays the 'Position Approval' page in the University of Colorado HR system. At the top, there are navigation tabs for 'Description', 'Specific Information', and 'Position Approval'. Below the tabs are several action buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Refresh', 'Update/Display', and 'Include History'. The main content area shows the 'Position Number' as 00679962 and a 'Go To Position Funding' link. The 'Headcount Status' is displayed as 'Current Head Count: 0 out of 0'. Below this, there is a search bar with 'Find | View All' and pagination controls showing '1 of 1'. The 'Short' description is 'Teach Asst' and the 'Long Description' is 'Teaching Assistant'. There is an 'Essential Services' checkbox. The 'Approval' section contains the following information: 'Effective Date: 08/01/2007', 'Position Notes' (with a document icon), 'Reason Code: NEW New Posn', 'Status Date: 04/04/2007', and 'Position Status: Approved' (with a dropdown arrow). The 'Appr.Reject' field is 'Ruiz-Corchado,Julia'. At the bottom, there are 'Save', 'Return to Search', 'Notify', and 'Refresh' buttons. The footer shows the navigation tabs: 'Description | Specific Information | Position Approval'.

Step 13:

Click  **Position is approved**

Note:

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:

The screenshot displays the University of Colorado HR89PRAC PRACT61 Home page. The main navigation menu on the left includes sections like 'My Favorites', 'Reports and Reviews', 'Recruiting', 'Workforce Administration', 'Compensation', 'Time Collection', 'Workforce Development', 'Organizational Development', and 'Position Management'. The 'Funding Approval' page is active, showing a 'Funding' summary with 'Position Number: 00679962', 'Sequence: 0', and 'Entered Date: 04/04/2007'. The 'Funding Status' is 'Approved' with a 'Status Date' of '04/04/2007'. The 'Funding Begin Date' is '08/01/2007' and the 'Appr Reject' is 'Ruiz-Corchado, Julia'. A 'Distribution' table is shown below with one row of data.

Percent	Speed Type	Funding End Date	Speed Type Description	Fund	Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer
1	100.000	11023198	05/31/2008	Trial Advocacy Prgrms	10	10352	14675			

Step 16:

Click  Position funding is approved.

Creating and Approving a Student Position completed.

Exercise 2 – Hiring and Approving a Student Faculty Employee

Scenario: A candidate for this teaching assistant 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**



University of Colorado

HR89PRAC PRACT46 Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | help

Add Person

Person ID: NEW

[Search for Matching Persons](#)

[Add the Person](#)

Step 2:

On Search Criteria page provide as many fields as available:

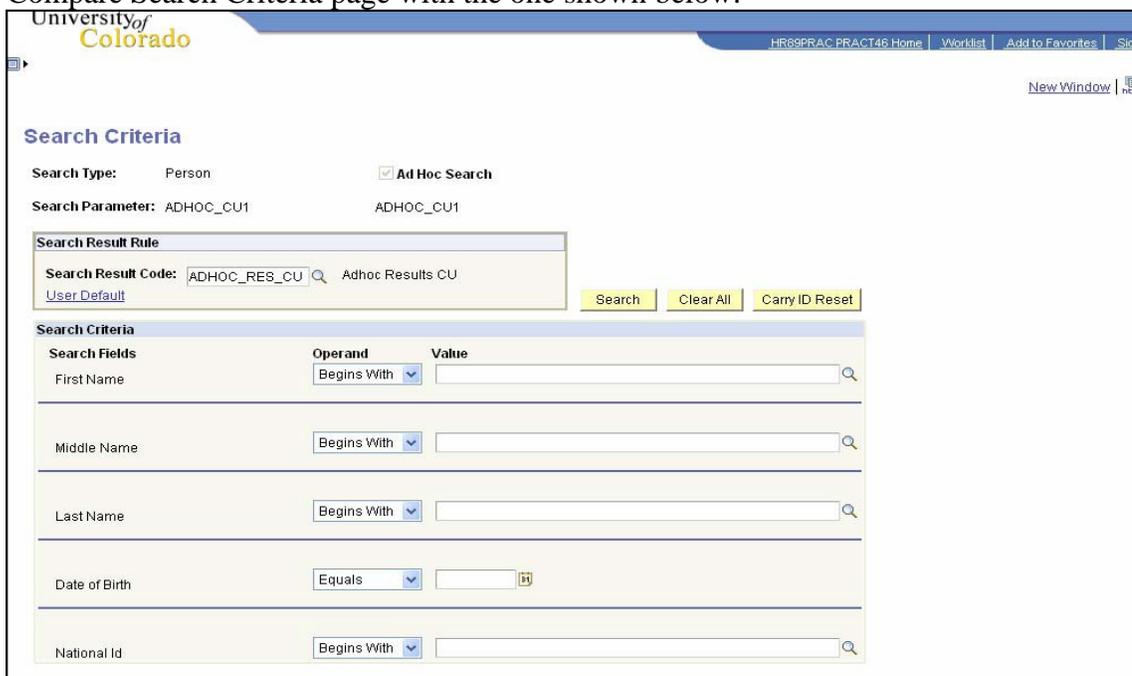
First Name
Middle Name
Last name
Date of Birth
National ID

Note:

Name fields are *Case Sensitive*.

Step 3:

Compare Search Criteria page with the one shown below:



University of Colorado

HR89PRAC PRACT46 Home | Worklist | Add to Favorites | Sign out

New Window | help

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	
Middle Name	Begins With	
Last Name	Begins With	
Date of Birth	Equals	
National Id	Begins With	

Click

Step 4:

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

Click: [Add the Person](#)

The screenshot shows the 'Add Person' page in the HRMS system. At the top left is the University of Colorado logo. The top right navigation bar includes links for 'HR89PRAC PRACT46 Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the navigation bar, there are links for 'New Window' and 'Customize Page'. The main content area has a tab labeled 'Add Person'. Underneath, there is a 'Person ID' field containing the text 'NEW' and a blue link 'Search for Matching Persons'. A blue button labeled 'Add the Person' is circled in red.

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.
Click <input type="button" value="Add Name"/>	Required: First Name, Middle Name, Last Name Optional: Prefix, Suffix The name must be entered as it appears on the new Employee's Social Security Card
Click <input type="button" value="OK"/>	Returns to Biographical Details page
Required Fields	Date of Birth Gender Home Department Campus Box SSN/National ID

Note:

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

Step 6:

Compare your Biographical Details page with the one shown below:

University of Colorado
HR89PRAC PRACT61 Home Worklist
New Window

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: 08/20/2007 + -
*Format Type: English
Display Name: Teacher, Student Edit Name

Biographic Information
*Date of Birth: 04/24/1982 24 Years 11 Months

Biographical History Find | View All First 1 of 1 Last
*Effective Date for PERSONAL DATA: 08/20/2007 + -
Gender: Female
*Highest Education Level: A-Not Indicated
Language Code: English FERPA Flag
Military Status:
Previous Non-Employee T-ID:
Home Department: 10352 School of Law
Campus Box: 401 UCB School of Law

National ID Customize | Find | View All First 1 of 1 Last
Country: USA National ID Type: Social Security Number National ID: 521-65-4578 Primary ID:

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

Step 7:

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

Contact Information page

University of Colorado
HR89PRAC PRACT61 Home Worklist
New Window

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 Add Address Detail
Home 09/01/2007 Add Address Detail
Mailing Add Address Detail

Phone Information Customize | Find | View All First 1 of 1 Last
*Phone Type Telephone Extension Preferred
Campus 1 [] + -

Email Addresses Customize | Find | View All First 1 of 1 Last
*Email Type *Email Address Preferred
Campus [] + -

Save Notify Previous tab Next tab Refresh Update/Display

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

Step 8:

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 9:

Edit Address page displays

Enter Address and click and then click again.

University of Colorado

Edit Address

Country: United States

Address 1: 111 99th St

Address 2:

City: Longmont State: CO Colorado Postal: 80501

County:

OK Cancel

Step 10:

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:	Select the appropriate phone type; Enter the telephone number (Click <input type="button" value="+"/> to add rows for additional phone #s)
Email Address(es):	Select the appropriate email Address type; Enter the email address (Click <input type="button" value="+"/> 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.

The University uses the mailing address to send information regarding employment related issues, including payroll advices, benefits information, W-2's, etc.

Step 11:

Compare Contact Information page with the one shown below.

Step 12:

Click **Identity/Diversity** or use the link at the bottom of the page

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

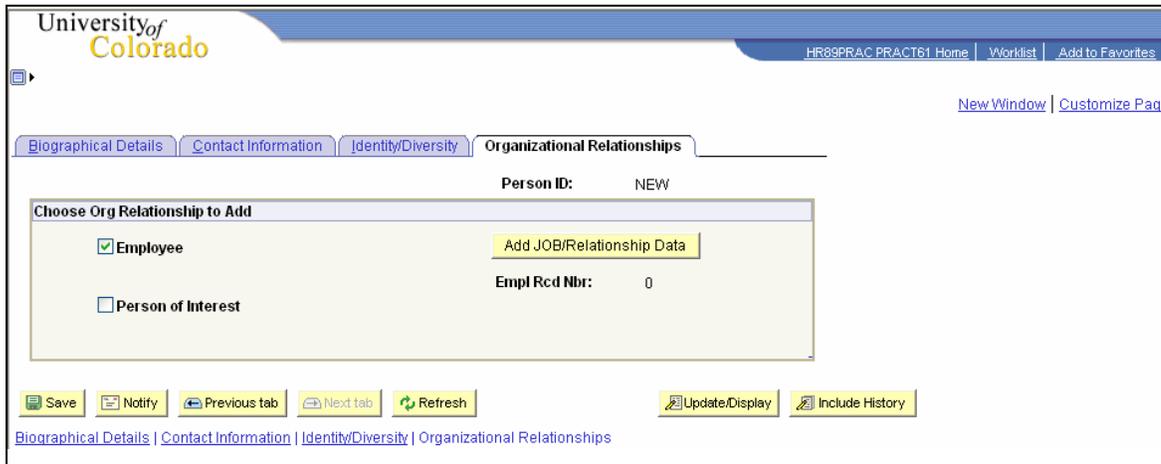
Step 13:

Click [Organizational Relationships](#)

Organizational Relationships page displays.

Check Employee box

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



Step 14:

Work Location page displays

New Employee ID number is now assigned

Effective Date	Enter Date of Hire
Action (required)	Defaults to Hire; leave as is
Reason (required)	Enter appropriate reason for hire
Position (required)	Enter Position number. Other fields will populate based on position number created in Exercise 1
Job Notes (optional)	<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 15:

Compare your Work Location page with the one shown below:

University of Colorado
HR89PRAC PRACT61 Home

[New](#)

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

Teacher, Student EMP ID: 190076 Empl Rcd #: 0

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

HR Status: Active Empl Status: Active [Calculate Status and Dates](#)

Effective Date: 08/20/2007 Sequence: 0 Job Notes

Action / Reason: Hire HIR New Hire Future

Position Number: 00679962 Teaching Assistant Position Entry Date: 08/20/2007

Regulatory Region: USA United States [Position Data](#)

Company: CU University of Colorado Appointment End Date:

Business Unit: UCOLO University of Colorado

Department: 10352 School of Law Department Entry Date: 08/20/2007

Location: 1W/LAW Wolf Law Building

Establishment ID: CU University of Colorado

Last Updated by: Last Upd DtTm: 04/04/2007 12:44:30PM Date Created: 04/04/2007

[Save](#) [Notify](#) [Previous tab](#) [Next tab](#) [Refresh](#) [Add](#)

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

Step 16:

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

Employee Class (required)	Required for Student Position. Choose "J" (Student Faculty–No Student Retirement) for this position. Use to choose correct code.
Percent of Time and Standard Hours	Defaults from position data and can be updated. A change to either one updates the other

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

The screenshot shows the 'Job Information' tab selected in the HR system. The header includes 'University of Colorado' and navigation links like 'HR99PRAC PRACT61 Home' and 'Worklist'. The main content area displays details for a 'Teacher, Student' with ID '190076' and 'Empl Rcd #' '0'. The 'Job Information' section includes fields for 'Effective Date' (08/20/2007), 'Sequence' (0), 'Appr Status' (Proposed), and 'Appr Reject' (Future). It also shows 'Job Code' (1506), 'Teaching Assistant', and 'Entry Date' (08/20/2007). A 'Reports To' section includes 'Regular/Temporary' (Temporary), 'Empl Class' (J), 'Regular Shift' (N/A), and 'Classified Indc' (Std Fac). A 'Standard Hours' section shows 'Standard Hours' (20.00) and 'FTE' (0.000000). At the bottom, there are buttons for 'Save', 'Notify', 'Previous tab', 'Next tab', 'Refresh', and 'Add'.

Step 17:

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:

The screenshot shows the 'Payroll' tab selected in the HR system. The header is identical to the previous screenshot. The main content area displays details for the same 'Teacher, Student' with ID '190076' and 'Empl Rcd #' '0'. The 'Payroll Information' section includes fields for 'Effective Date' (08/20/2007), 'Sequence' (0), 'Appr Status' (Proposed), and 'Appr Reject' (Future). It also shows 'Payroll System' (Payroll for North America). A 'Payroll for North America' section includes fields for 'Pay Group' (MON Monthly Employee), 'Employee Type' (S Salaried), 'Tax Location Code' (NO LOCAL), 'Holiday Schedule' (NONE No Hol Sch), and 'FICA Status' (Subject). At the bottom, there are buttons for 'Save', 'Notify', 'Previous tab', 'Next tab', 'Refresh', and 'Add'.

Step 18:

Click [Compensation](#)

Compensation page displays

Frequency	Verify that M (monthly has defaulted)
Pay Components section (required)	Enter Rate Code – BASEM Enter Monthly Comp Rate (dollar amount of monthly pay)
Click Calculate Compensation (required)	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 19:

Compare your Compensation page with the one shown below:

University of Colorado

HR69PRAC PRACT61 Home | Worklist | Add to Favorites

New Window | Customize Pa

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

Teacher, Student EMP ID: 190076 Empl Rcd #: 0

Compensation Find | View All First 1 of 1 Last

Effective Date: 08/20/2007 Sequence: 0 Job Notes Appr Status Proposed 08/20/2007
Action / Reason: Hire New Hire Appr/Reject Future

Compensation Summary

Base Compensation Rate: 1,250.000000 USD *Frequency: M Monthly
Total Compensation Rate: 1,250.000000 USD

Salary Administration Plan: 150 Grade: 000 Standard Hours: 20.00
Job Code: 1506 Teaching Assistant Percent of Time: 50.00 FTE:

Comparative Information

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

Pay Rates

Annual	15,000.000000 USD	Daily	57.692308 USD
Monthly	1,250.000000 USD	Hourly	14.423077 USD

Pay Components Customize | Find First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEM	0	1,250.000000 USD	USD	M

Calculate Compensation

Save | Notify | Previous tab | Next tab | Refresh | Add

Step 20:

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

Employment Information page displays

Appointment End Date (Required for Student employees)	Date the teaching assistant appointment ends.
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Notes:

Funding for the position must cover the full length of the 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 21:

Compare your Employment 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**

Teacher, Student EMP ID: 190076 Empl Rcd #: 0

Empl Rcd: 0 Univ Employment Date:

Last Start Date:

Termination Date: Service Dt:

Empl Record

Class Staff Seniority Date: 0 0 0

Class Staff Save Pay End Date:

Business Title: Teaching Assistant Classified Staff LOS:

Job Code Entry Date:

Classified Staff Certification Date:

USA

12 Month Faculty

Appointment End Date: 05/31/2008 Contract Length: Not Applic?

Accrue Tenure Services

FTE for Tenure Accrual:

Service Calculation Group: FTE for Flex Service Accrual:

Save Notify Previous tab Next tab Refresh Add

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

Step 22:

Click:

Make note of the teaching assistant's employee ID (EmplID) number

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

Step 23:

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
HR&PRAC PRACT61 Home | Worklist | Add to Favorites
New Window | Customize Page

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

Teacher, Student Emplid: 190076

Emergency Contact Find | View All First 1 of 1 Last

'Contact Name: Mary Miles + -

'Relationship to Employee: Mother Primary Contact

Same Address as Employee Address Type:

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

Employee's Current Address

Country:

Address:

Employee's Phone

Phone: 303/492-0000

Save Return to Search Notify

ContactAddress/Phone | Other Phone Numbers

Click:

Make a note of the employee ID (EmplID) number, if not done so already.

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 24:

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

Step 25:

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 26:

Compare your Job Approval page with the one shown below:

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

Menu
Search: [] []
My Favorites
Reports and Reviews
Recruiting
Workforce Administration
Personal Information
Job Information
Contract Administration
Review Job Information
Reports
Add Employment Instance
Job Data
Update Contract Pay NA
Job Data Transfer/Rehire only
Job Approval
Company Property
Plan Salaries CU
Workforce Reports
Compensation
Time Collection
Workforce Development
Organizational Development
Enterprise Learning
Reporting Tools

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

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

ID: 190076 | Appoint End Dt 05/31/2008

Approval Find First 1 of 1 Last

Effective Date: 08/20/2007 Sequence: 0 Job Notes Payroll Status: Active

Action: HIR Hire Reason: HIR New Hire

Department: 10352 School of Law Action Date: 04/04/2007

Job Code: 1506 Teaching Assistant %TIME: 50.00

Position Number: 00679962 Teaching Assistant Std Hrs/Wk: 20.00

Comp Freq: M Monthly

Pay Rate Data		Compensation Summary	
Annual Rate:	15000.000	Base Compensation Rate:	1,250.000000
Monthly Rate:	1250.000	Total Compensation Rate:	1,250.000000
Hourly Rate:	14.423077		

Approval Status: Approved Status Date: 04/04/2007 Appr/Reject: Ruiz-Corchado,Julia

Save | Return to Search | Notify | Previous tab | Next tab | Refresh

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

Step 27:

Click . The Teaching Assistant has been hired

Hiring a student faculty employee and approving the hire completed

Exercise 3 – Entering a Pay Rate Change for a Student Faculty Employee

Scenario: The Dean of the School of Law has researched all the teaching assistant salaries in the department and has made a decision to increase the pay for their newest TA to match the salaries of the other TA's. Now, acting as the PPL for the department, you are going to enter the TA's pay rate change.

Step 1:

Navigate: Workforce Administration; Job Information; Job Data / **Find an Existing Value**

Step 2:

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

EmplID: (required)	Enter the TA's EmplID. You can also search by Name or Last Name
------------------------------	--

Step 3:

Compare your Job Data – Find an Existing Value search page with the one shown below.

The screenshot shows the 'University of Colorado' HR system interface. The main content area is titled 'Job Data' and contains the following search criteria:

- EmplID:** begins with 190076
- Empl Rcd Nbr:** =
- Name:** begins with
- Last Name:** begins with
- Department:** begins with
- Last 4 SSN:** begins with
- HR Status:** =
- Employee Status:** =

There is a checked box for 'Include History'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A 'New Window' link is visible in the top right corner.

Step 4:

Click **Search**

Step 5:

On the Work Location page page, enter or select the following:

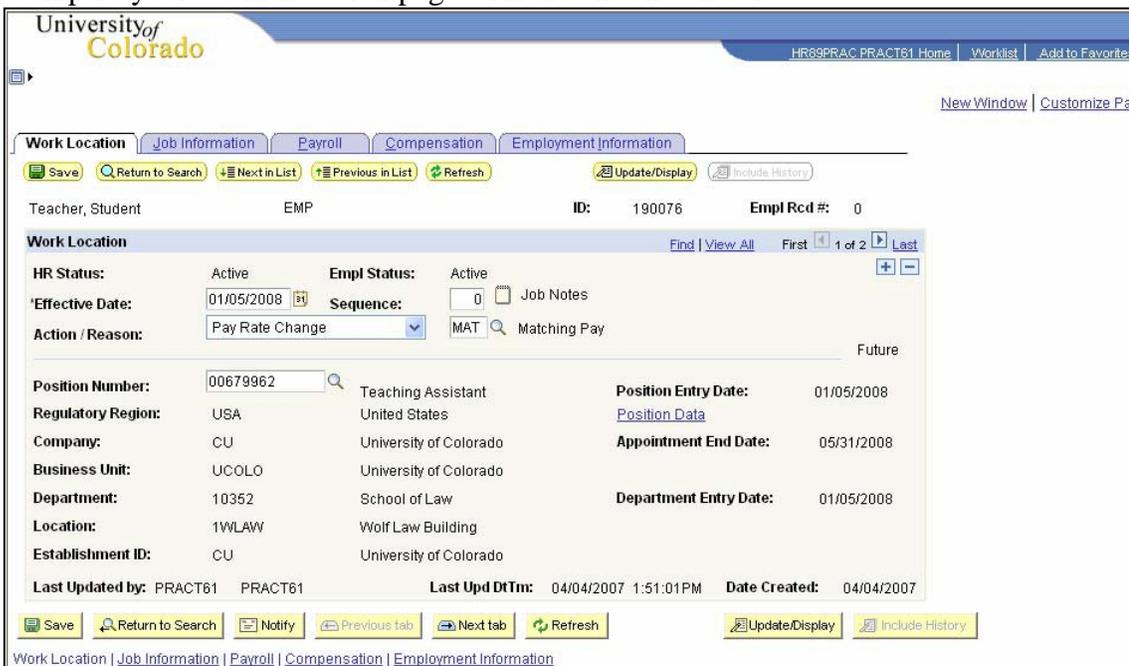
Insert a Row: (required)	Click  to insert a row
Effective Date: (required)	01/05/08 This is the date you want the pay rate change to take effect
Action: (required)	Pay Rate Change
Reason: (required)	MAT (Matching Pay)
Comments: (optional)	Record any comments relative to the termination

Note:

When a row is inserted on the page where the effective date field is (for this exercise in Job Data, the effective date field is on the Work Location page), the system copies all of the data on all of the pages in the Job Data group, thus retaining the former effective dated information for historical purposes. The new row of data that we have just inserted is now available for us to make any changes to, e.g. the new effective date, the action and reason, and finally the TA’s salary change amount. The former row of data is now a ‘history’ row and the newly inserted row becomes the ‘current’ row of data.

Step 6:

Compare your Work Location page with the one shown below:



Step 7:

Click [Compensation](#) or use the Compensation link at the bottom of the page.

Step 8:

On the Compensation page, enter the following:

Comp Rate: (optional)	1350.00 (Change the salary of 1250.00 to 1350.00)
Calculate Compensation: (required)	After entering compensation rate, click on the Calculate Compensation button

Step 9:

Compare your Compensation page with the one shown here:

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

Teacher, Student EMP ID: 190076 Empl Rcd #: 0

Compensation Find | View All First 1 of 2 Last

Effective Date: 01/05/2008 Sequence: 0 Job Notes Appr Status Proposed 04/04/2007
Action / Reason: Pay Rt Chg Matching Pay Appr/Reject Future

Compensation Summary

Base Compensation Rate: 1,350.000000 USD Frequency: M Monthly
Total Compensation Rate: 1,350.000000 USD

Salary Administration Plan: 150 Grade: 000 Standard Hours: 20.00
Job Code: 1506 Teaching Assistant Percent of Time: 50.00 FTE:

Comparative Information

Change Amount: 100.000000 USD Monthly Monthly Hrly Rate
Change Percent: 8.000

Pay Rates

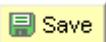
Annual	16,200.000000 USD	Daily	62.307692 USD
Monthly	1,350.000000 USD	Hourly	15.576923 USD

Pay Components Customize | Find First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency
1 BASEM	0	1,350.000000 USD	USD	M

Calculate Compensation

Step 10:

Click  Save

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

Step 11:

Navigate to the Job Approval page using the menu on the left side of the page.

Step 12:

On the Job Approval page, enter the following:

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

Step 14:

Compare your Job Approval page with the one shown below:

The screenshot shows the University of Colorado HR system interface. On the left is a navigation menu with categories like 'My Favorites', 'Reports and Reviews', 'Recruiting', and 'Workforce Administration'. The main area has tabs for 'Work Location', 'Job Information', 'Payroll', 'Compensation', 'Employment Information', and 'Job Approval Cu'. The 'Job Approval' tab is selected, showing details for job ID 190076. The 'Approval' section lists two entries: one for 01/05/2008 with action 'PAY' and reason 'MAT Matching Pay', and another for 08/20/2007 with action 'HIR' and reason 'HIR New Hire'. Both are marked as 'Active'. A 'Pay Rate Data' table shows annual, monthly, and hourly rates. A 'Compensation Summary' table shows base and total compensation rates. At the bottom, the 'Approval Status' is set to 'Approved' with a status date of 04/04/2007 and approver 'Ruiz-Corchado, Julia'.

Step 13:

Click  Save

Entering and approving a pay rate change completed

Exercise 4 – Recording and Approving Student Faculty Employee Termination

Scenario: The TA's job appointment has ended because the academic year has come to a close. His/her last day to work is May 31, 2008. Your goal is to record the termination, effective June 1, 2008.

Step 1:

Navigate: Home; Workforce Administration; Job Information; Job Data; **Find an Existing Value**

Step 2:

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

EmplID: (required)	Enter the TA's EmplID. You can also search by Name or Last Name
------------------------------	--

Step 3:

Compare your Job Data – Find an Existing Value search page with the one shown below. Because you are searching for your employee, the EmplID on this page will differ from the one shown here:

The screenshot shows the 'Find an Existing Value' search page in the University of Colorado HR system. The page includes a navigation menu on the left, a search bar at the top, and a search form with the following fields:

- EmplID:** begins with [190076]
- Empl Rcd Nbr:** [=]
- Name:** begins with []
- Last Name:** begins with []
- Department:** begins with []
- Last 4 SSN:** begins with []
- HR Status:** [=]
- Employee Status:** [=]

There is a checkbox for 'Include History' which is checked. At the bottom of the form, there are buttons for 'Search' (highlighted in yellow), 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step 4:

Click **Search**

Step 5:

On the Work Location page, enter the following:

Insert a Row: (required)	Click  to insert a row
Effective Date: (required)	06/01/2008 – Termination Date, <i>which is first day employee no longer works for the university in this job</i>
Action: (required)	Termination
Reason: (required)	END (End of Appointment)
Job Notes: (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 Saturday, May 31, 2008, then the effective date of the termination is Sunday, June 1, 2008

Step 6:

Compare your Work Location page with the one shown below:

The screenshot displays the 'Work Location' page for an employee with ID 190076. The page is titled 'University of Colorado' and includes navigation tabs for 'Work Location', 'Job Information', 'Payroll', 'Compensation', and 'Employment Information'. The 'Work Location' tab is selected, showing a form with the following details:

- Teacher, Student:** EMP
- ID:** 190076
- Empl Rcd #:** 0
- HR Status:** Inactive
- Empl Status:** Terminated
- Effective Date:** 06/01/2008
- Sequence:** 0
- Action / Reason:** Termination
- Job Notes:** END
- Last Date Worked:** 05/31/2008
- Position Number:** 00679962
- Position:** Teaching Assistant
- Position Entry Date:** 01/05/2008
- Regulatory Region:** USA, United States
- Company:** CU, University of Colorado
- Appointment End Date:** 05/31/2008
- Business Unit:** UCULO, University of Colorado
- Department:** 10352, School of Law
- Department Entry Date:** 01/05/2008
- Location:** 1WDLAW, Wolf Law Building
- Establishment ID:** CU, University of Colorado
- Last Updated by:** PRACT61
- Last Upd DtTm:** 04/04/2007 1:51:01PM
- Date Created:** 04/04/2007

Step 7:

Click 

Now we are going to 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 8:

Use the navigation menu on the left side of the page to select: **Job Approval**

Step 9:

On the Job Approval page, enter the following:

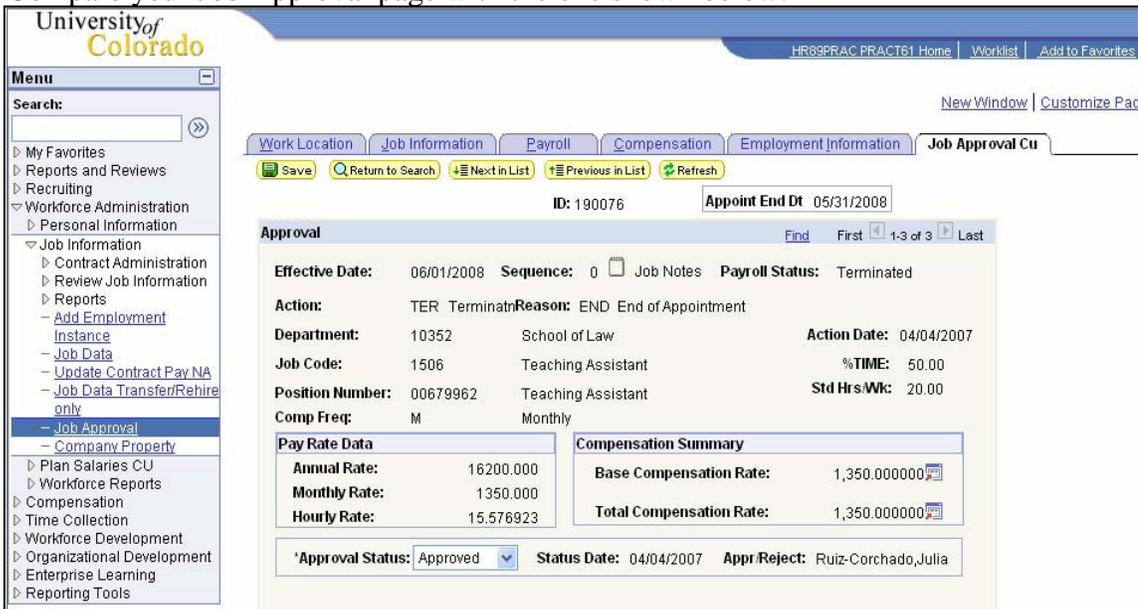
Approval Status: (required)	Approved
Comments: (optional)	Approver may add to termination comments entered by end-user

Step 10:

Click 

Step 11:

Compare your Job Approval page with the one shown below:



The screenshot shows the University of Colorado HR system interface. On the left is a navigation menu with 'Job Approval' selected. The main area displays job details for ID 190076. Key information includes: Effective Date: 06/01/2008, Department: School of Law, Job Code: 1506, Position Number: 00679962, and Action Date: 04/04/2007. The 'Approval Status' is 'Approved'. Below the job details are sections for 'Pay Rate Data' and 'Compensation Summary'.

Pay Rate Data		Compensation Summary	
Annual Rate:	16200.000	Base Compensation Rate:	1,350.000000
Monthly Rate:	1350.000	Total Compensation Rate:	1,350.000000
Hourly Rate:	15.576923		

Terminating the TA completed

End of Life Cycle Exercise for a Student Faculty Employee