University of Colorado
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EMPLOYEE SERVICES

Life Cycle Exercises Student Faculty Member

Create and Approve a Position
Hire
Change in Salary
Terminate

Teaching Assistant

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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**

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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 ▾ [   ]
Description: begins with ▾ [   ]
Position Status: = ▾ [▾]
Business Unit: begins with ▾ [   ] 🔍
Department: begins with ▾ [   ]
Job Code: begins with ▾ [   ] 🔍
Reports To Position Number: begins with ▾ [   ]
☑ 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.

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**
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 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:

Step 7:
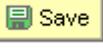
Click [Save]

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:

Click

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

Step 10:
<u>Select **Position Approval** from the Navigation box on the left side of the screen.</u>

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:

Step 13:

Click **🖫 Save**   **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:

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**

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:

Click `Search`

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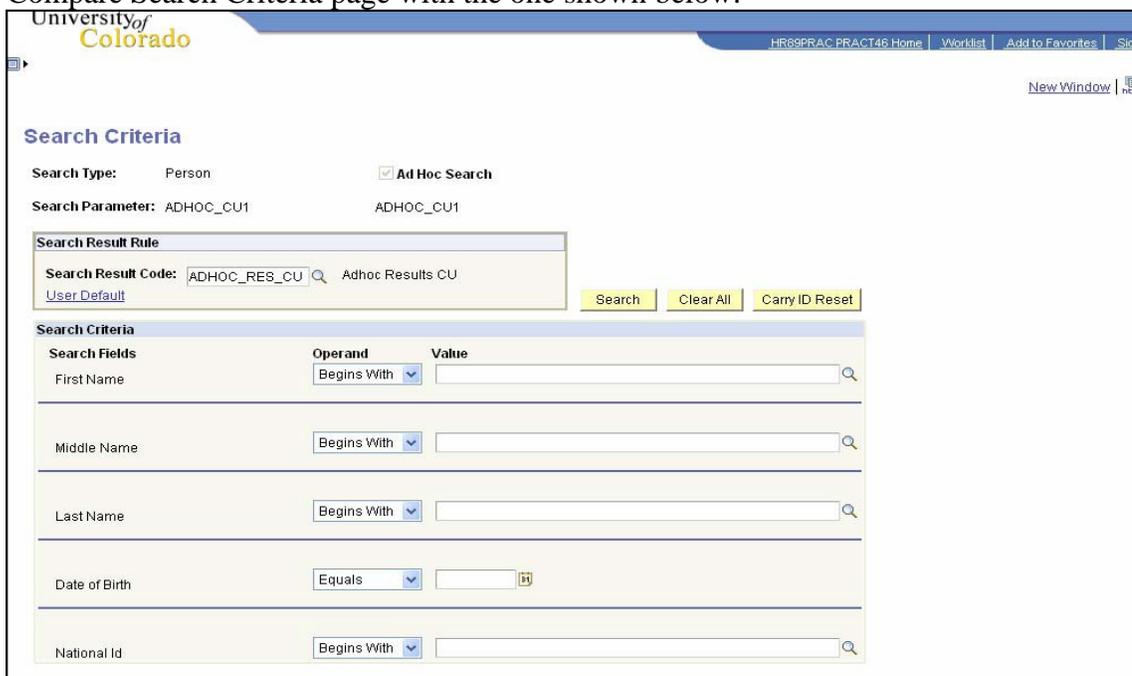
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HR89PRAC PRACT46 Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | http

Add Person

Person ID: NEW Search for Matching Persons

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.**
Click `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 `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:

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

Step 8:
Address History page displays

    Click Add Address

Step 9:
Edit Address page displays

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

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 ➕ to add rows for additional phone #s)
Email Address(es):	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.

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

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 13:

Click Organizational Relationships

Organizational Relationships page displays.

     Check Employee box

     Click   Add JOB/Relationship Data   or   Save
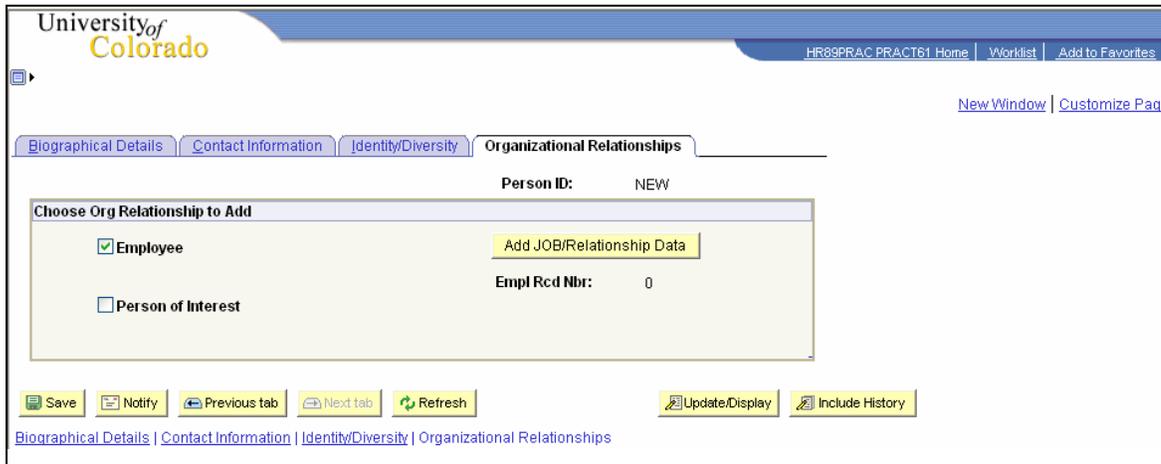
Step 14:

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)	**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 15:

Compare your Work Location page with the one shown below:

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:

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:

Step 18:

Click [Compensation]

Compensation page displays

Frequency	Verify that M (monthly has defaulted)

Pay Components section
        (required)
 	
Click
[Calculate Compensation]
        (required)
	Enter Rate Code – BASEM
	Enter Monthly Comp Rate (dollar amount of monthly pay)
	
	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:

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.

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:

Step 22:

Click: ⬚ Save

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:

Click: Save

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:

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

Step 3:
Compare your Job Data – Find an Existing Value search page with the one shown below.

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:
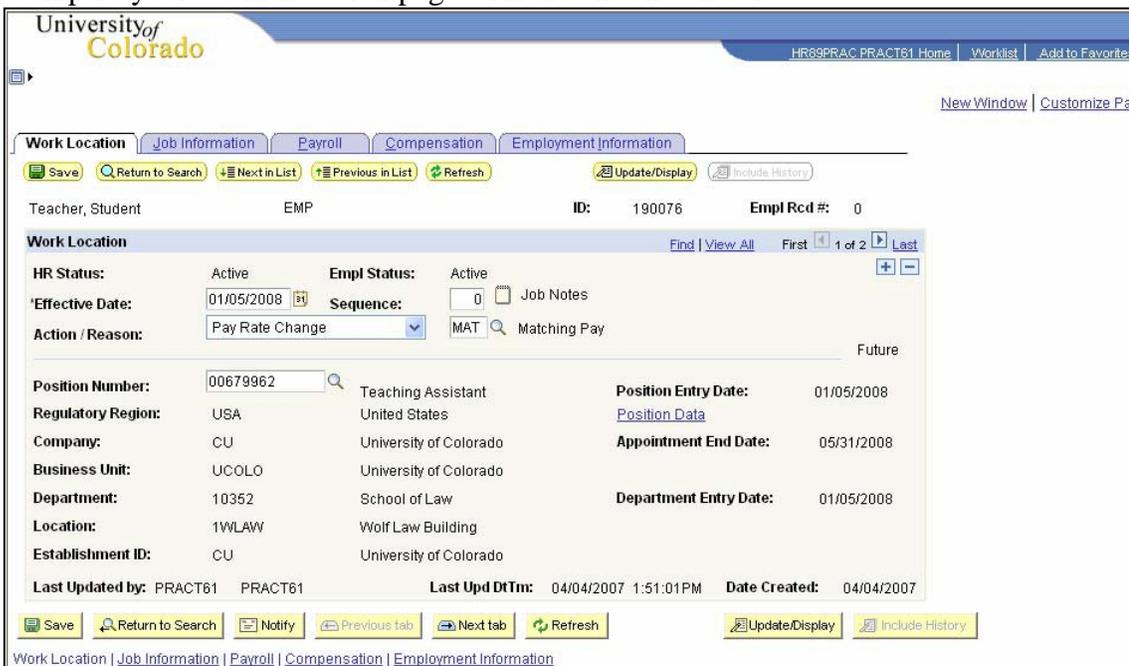
Step 7:
Click [Compensation] or use the Compensation link at the bottom of the page.

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:

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:

Step 13:
Click ![Save](save button)

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:

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, *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:

> **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:

Step 7:

Click [💾 Save]

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**
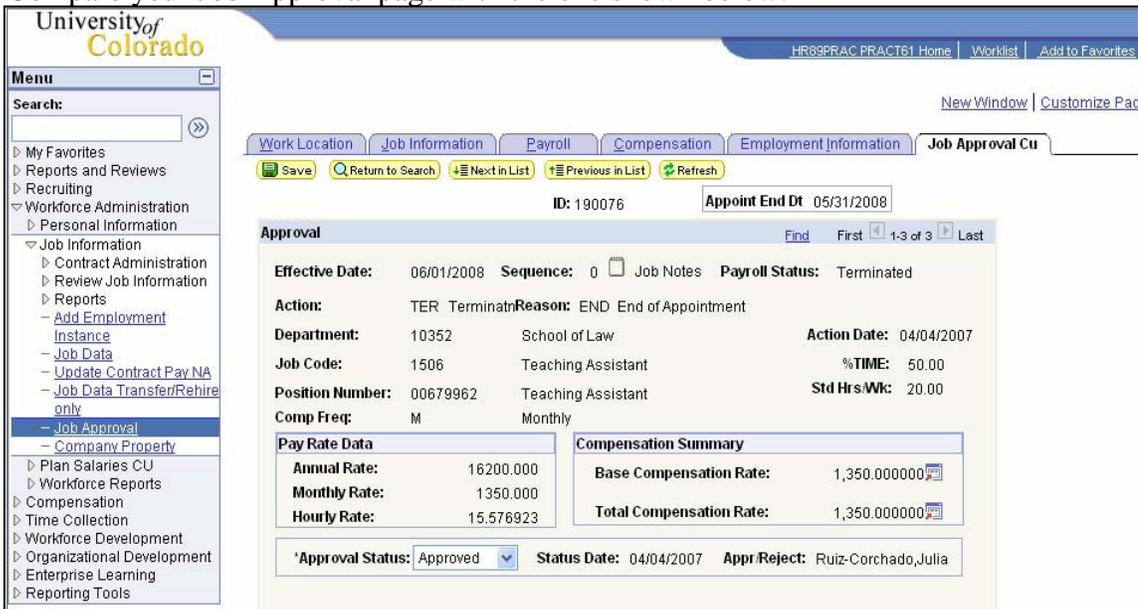
Step 9:
On the Job Approval page, enter the following:

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

Step 10:
Click [Save]

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

Terminating the TA completed

End of Life Cycle Exercise for a Student Faculty Employee