ES HCM Campus Call

Employee Services ——— July 7, 2020 ——— 3:00PM to 4:00PM

Presented on the first Tuesday of the month for the HCM Campus Community
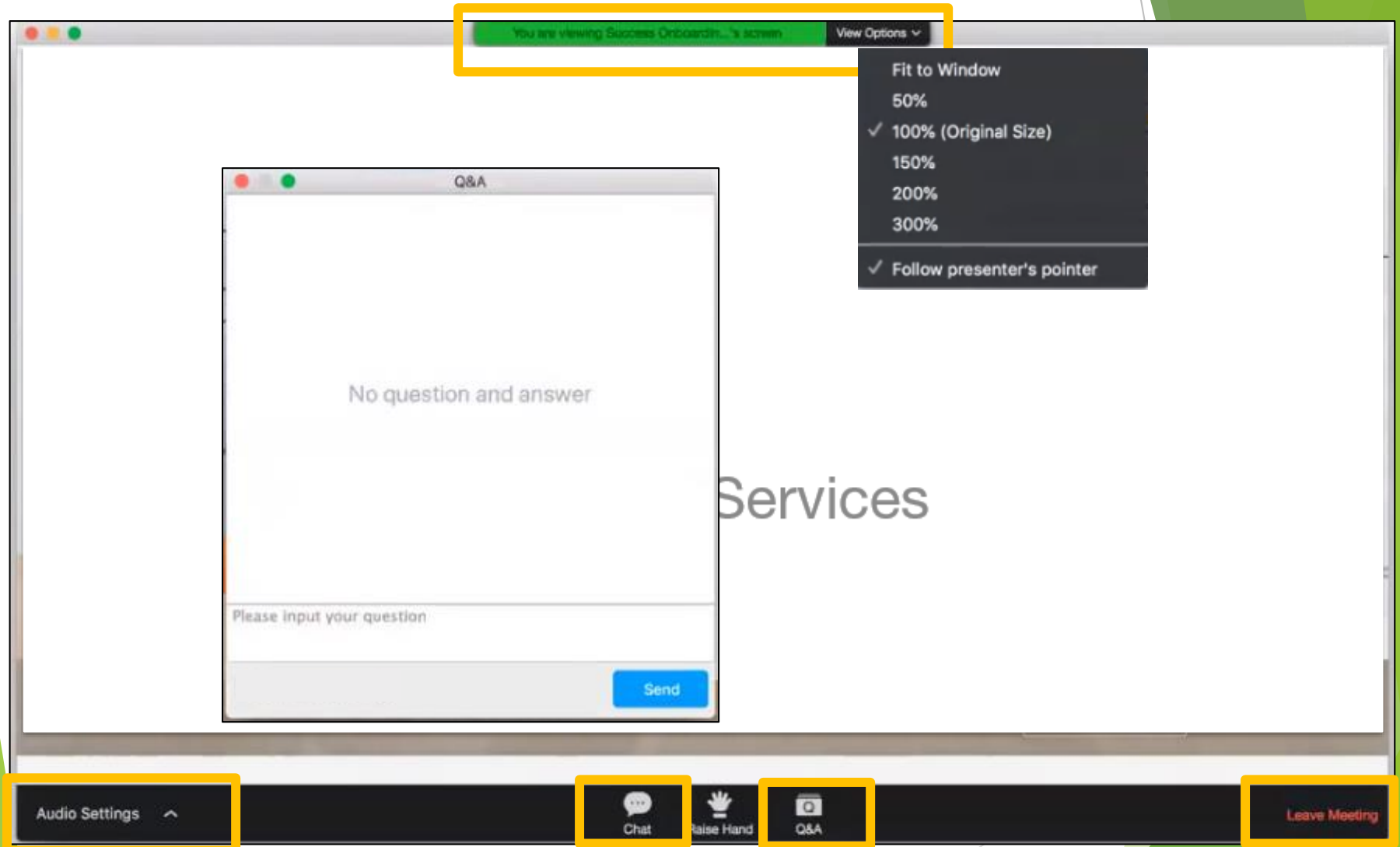
zoom Controls

Presenting Today

- Catherine McCoy, Payroll HR/GL Specialist

- Rachelle Beauplan, Payroll Coordinator

- Kyle Gibson, HCM Data Team

Additional Contributions:

- Josh Navarro, Asst Director, ES HRIS

- Justin Loiselle, Function Analyst

- Deborah Lowe, Benefits Team

- Scot Frey, HCM Data Team

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Agenda

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CU System Updates

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UIS Maintenance Matters

https://www.cu.edu/uis/maintenance-matters

Production Maintenance ⊕

Upcoming System Maintenance:

The System Portal will be unavailable from 6:00 AM to 2:00 PM on Sunday, July 12th. We apologize for any inconvenience.

HCM Maintenance ⊕

Upcoming System Maintenance:

The System Portal will be unavailable from 6:00 AM to 2:00 PM on Sunday, July 12th. We apologize for any inconvenience.

Other Maintenance ⊕

See All

Nonproduction Maintenance ⊕

🔧 6 a.m. to 6 p.m. July 10 maintenance for nonproductive systems

See All

Campus Solutions Maintenance ⊕

🔧 6 a.m. to 2 p.m. July 12 maintenance for Campus Solutions productive systems

See All

Completed Maintenance ⊕

✅ June 5 maintenance completed for non-production services

✅ May 31 maintenance completed for production services

See All

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CU System Policy

https://www.cu.edu/blog/ope/updates-article-5-faculty-and-related-policies

Updates to Article 5: Faculty and related policies July 1, 2020
by Jim Worsham

The following new, revised, restructured and rescinded regent laws, regent policies and associated administrative policy statements relating to faculty are effective, as of July 1, 2020:

Regent Laws	Action
Article 5: Faculty	Revisions
Article 9: Designations	Rescission

Regent Policies	Action
Policy 5: Faculty	
Policy 5.A: Faculty Governance	
Policy 5.B: Academic Freedom	
Policy 5.C: Faculty Appointments	
Policy 5.D: Reappointment (to a tenure-track position), Tenure, and Promotion	Revisions and Restructured
Policy 5.E: Tenured and Tenure-Track Faculty Dismissal for Cause	
Policy 5.F: Termination of Faculty Appointments Following Program Discontinuance	
Policy 5.G: Faculty Grievance	
Appendix 4.1: Dismissal of Faculty as a Result of Academic Unit or Degree Program DiscontinuanceR	Rescission

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CU System Policy

Updates to Regent Laws & Policies - June 18, 2020 June 24, 2020 by Jim Worsham

Consolidation of conduct policies becomes effective on June 18, 2020

▶ The Board of Regents officially approved the new *Article 8: Conduct of Members of the University Community* and *Policy 8: Conduct of Members of the University Community*.

  ▶ Includes nondiscrimination, ethical and professional employee conduct – previously located in Articles 1.D, 3.E, 10 and 11.D.

  principles of ethical behavior and professional conduct for university staff, including conflict of interest, outside consulting and service on external boards.

Changes to Regent Law (Article) 2.B and Policies 13.G and 14.A

  ▶ *Article 2.B: Meetings*

  ▶ *Policy 13.G: Contractual Indemnification of Contractors* and *Policy 14.A: Use of University Seal* (no changes)

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ES HCM Operations

ES - CU Careers
ES - Benefits Core
ES - HCM Core
ES - Payroll
ES - HR/GL
ES - Time & Leave

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ES - HCM Core

Fall Contract Deadlines

https://www.cu.edu/blog/hcm-community/get-ready-fall-contract-renewals-these-deadlines-and-tips
https://www.cu.edu/hcm-community/step-step-working-contracts

Get ready for fall contract renewals with these deadlines and tips July 1, 2020 by Employee Services

Contract deadlines to keep an eye on as the fall semester approaches. If you'd like a refresher, check out the Working With Contracts Guide.

07/10/20	07/14/20	7/14/20	7/24/20	08/03/20	08/05/20
Last day for faculty to change their elections.	ES sends lists of faculty who are set to be renewed to HR departments to check for accuracy.	ES sends list of faculty to return from leave in HCM by the first day of the new academic year prior to the renewal process.	Last day for HR departments to send any renewal list revisions to ES.	ES runs the Contract Renewal Process.	ES sends the renewed faculty list to HR departments.

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ES - Payroll

Colorado Tax Table updates

▶ Updates to HCM's tax tables and changes to the 2020 Colorado wage withholding went into effect July 1

▶ Faculty, staff, and students are encouraged to review their state tax deductions

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Changes to Colorado tax tables

https://www.cu.edu/blog/hcm-community/colorado-tax-table-updates-go-effect-july-paychecks

Three changes may affect paycheck withholdings :

▶ The 2020 federal tax reform changed the way that federal taxable income is calculated. This resulted in higher federal taxable income.

▶ This also affected the Colorado tax calculations, as Colorado uses the federal taxable income base to calculate tax withholding. The result: A higher Colorado taxable income.

▶ Allowances or dependents no longer affect the calculation of federal or Colorado taxable wages or tax withholding. Now, only your tax status (married or single) affects your Colorado state tax calculation.

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Colorado Tax - Additional Information

➢ Individuals may be able to apply income tax credits as it could reduce their Colorado income tax when filing a 2020 Colorado tax return.

➢ Complete the Additional/Cancel State-Withholding Request form if you believe you should have more CO state taxes withheld.

➢ **Email: HCM_Community@cu.edu**

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Parking fees - Pre-tax is back

https://www.cu.edu/blog/hcm-community/parking-fees-can-now-be-deducted-pre-tax-your-paycheck

Parking fees can now be deducted pre-tax from your paycheck July 1, 2020 by Employee Services

▶ Parking fees can now be deducted pre-tax as of 7/1/2020.

▶ Opt out if you do not want pretax deductions for your July paycheck

▶ Campus' parking offices coordinate campus-specific parking processes.

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ES - HR/GL

HR/GL FY20 Fiscal Year End

https://www.cu.edu/blog/hcm-community/four-steps-payroll-funding-fy20-close

Four steps for payroll funding FY20 close July 1, 2020 by Employee Services

1. Identify payroll in FY20 in **suspense**.
   - ▶ Filter the Payroll Register with Accounting Detail
2. Identify FY20 payroll **effort changes**.
3. **Reallocate FY20 payroll** funding with a PET.
   - ▶ PETs approved by **6 p.m. July 13** will post in FY20.
   - ▶ PETs approved after 6 p.m. July 13 will post in FY21.
4. Complete PETs before employees certify in the Personnel Effort Reporting system **(ePERs).**
   - ▶ Or new certification by the employee is required

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DBT Roll Forward Complete

https://www.cu.edu/blog/hcm-community/department-budget-table-dbt-roll-forward-complete
https://www.cu.edu/docs/sbs-funding-entry

Department Budget Table (DBT) roll forward complete June 29, 2020 by Employee Services

The Department Budget Table (DBT) Roll Forward was processed on June 29.

- ▶ created a new DBT funding row
- ▶ effective July 1, 2020
- ▶ for each active position in its active department
- ▶ unless a July 1 row already existed.

Remember:

- ▶ Funding continues when a DBT exists in the new fiscal year.

- ▶ Positions without funding or with expired funding cause payroll suspense.

- ▶ A NEW position and NEW DBT effective date must be the same date.

- ▶ ePAR transactions require a DBT in the same fiscal year.

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HR/GL and FY21 Funding

https://www.cu.edu/blog/hcm-community/ensure-fy21-funding-does-not-go-suspense

Ensure FY21 funding does not go into suspense July 1, 2020 by Employee Services

1. Confirm new funding rows.

  ▶ Use the **CU Position Funding History** or the **HCM Funding Distribution** query

2. Check for expired July funding from the DBT Roll Forward.

▶ The **Funding Suspense Current Row query** (CUES_HCM_FUNDING_SUSPENSE)

  ▶ Current funding rows with expired funding from the past or up to 45 days in the future.

▶ The **Funding Suspense Max Row query** (CUES_HCM_FUNDING_SUSPENSE_MAX)

  ▶ Current funding rows with expired funding from the past or up to 45 days in the future including future effective dated funding rows.

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DBT Roll Forward Complete

https://www.cu.edu/blog/hcm-community/department-budget-table-dbt-roll-forward-complete
https://www.cu.edu/docs/sbs-funding-entry

Department Budget Table (DBT) roll forward complete June 29, 2020 by Employee Services

Complete a **CU Funding Entry** to update funding.

- ▶ Update July expired funding.
- ▶ BW PPE 7/11/20 funding update:
  - ▶ Create an entry effective June 28, 2020.
  - ▶ Use the Apply to Next Fiscal Year to copy the new FY21 row effective July 1, 2020.
- ▶ Confirm each CU Funding Entry is in **Completed** status.
  - ▶ Funding does not post in Approved status

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Apply to Next Fiscal Year

https://www.cu.edu/blog/hcm-community/cu-funding-entry-page-apply-next-fiscal-year-will-be-disabled-july-17

CU Funding Entry page 'Apply to Next Fiscal Year' will be disabled July 17 June 29, 2020 by <u>Employee Services</u>

A new **Department Budget Table (DBT)** is required

- ► for every new position,
- ► each time a position changes departments
- ► and when the fiscal year changes.

The **Apply to Next Fiscal Year** feature in the CU Funding Entry

- ► copies the new funding row effective **before** July 1
- ► to a new row effective July 1
- ► so that the same funding continues into the new fiscal year.

Do not use the Apply to Next Fiscal Year feature with funding updates effective July 1, 2020 or later.

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Biweekly Pay Period Cross Over

FY20

Biweekly Begins June 28
Update Biweekly Funding
- Effective 6/28/20

Create CU Funding Entry
- Create 6/28 row

June

Su	Mo	Tu	We	Th	Fr	Sa
						27
28	29	30				

FY21

Biweekly Ends July 11
Update Biweekly Funding
- Effective 7/1/20

Apply to Next Fiscal Year
- Copy to 7/1 row

July

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11

Last day to Apply: July 16th (@ BW upload deadline)

Apply to Next Fiscal Year

https://www.cu.edu/blog/hcm-community/cu-funding-entry-page-apply-next-fiscal-year-will-be-disabled-july-17

The **Apply to Next Fiscal Year** feature is **disabled** on July 17, after the last fiscal year pay period.

Manually enter funding across fiscal years. Here's how:

▶ Existing Position in FY20/FY21: Create two CU Funding Entries
  ▶ one for the former fiscal year,
  ▶ and a separate one effective 7/1 for the new fiscal year.

▶ New Position effective in FY20 (created after FY20)
  ▶ Use the **HRGL Request** on the NEW row effective in FY20.
  ▶ Create a separate CU Funding Entry effective 7/1.

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ES HCM Support

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Student Employee Late Pay

https://www.cu.edu/blog/hcm-community/use-lts-all-hourly-student-employees%E2%80%99-late-pay

Use LTS for all hourly student employees' late pay October 1, 2019 by

Employee Services

For late pay for hourly student employee (after the pay period processed) in job codes 41XX:

▶ **Use the earnings code LTS (Late Pay for Students)** rather than **STH (Student Hourly)** in CU Time

▶ Late STH earnings may be deducted from the wrong year's work-study award.

Contact campus Student Employment Offices to determine if Payroll Expense Transfers (PETs) can be used and ensure the earnings are applied to the correct award year.

▶ **CU Boulder:** Late Pay/Hourly to Work-study Transfer Request

▶ **CU Denver | Anschutz Medical Campus: Email** studentemployment@ucdenver.edu

▶ **CU Colorado Springs: Use the** Student Employment Cherwell portal to submit a Late Pay Request Sheet

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Payroll Calendar

PAYROLL CALENDAR – UNIVERSITY of COLORADO SYSTEM **July** **2020**

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
		1 NO OFF-CYCLE THIS WEEK *	2 BW uploads due 5 pm	Independence Day 3 ALL CAMPUSES CLOSED NO OFF-CYCLE THIS WEEK *	4/5
6 Processing BW PPE 06/27/20	7 Run Payroll Register BW PPE 06/27/20 OC070220 uploads due 5 pm	8 PULL DEADLINE 10 AM: BW PPE 06/27/20 Processing OC070220	9	10 BW PPE 06/27/20 PAYDAY (Pay Run ID BW062720) OC070220 PAYDAY	11/12 PPE 07/11/20 Pay Run ID BW071120 Earn dates 06/28-07/11/20
13	14 OC070920 uploads due 5 pm	15 Processing OC070920	16 BW uploads due 5 pm	17 Processing BW PPE 07/11/20 OC070920 PAYDAY	18/19
20 Run Payroll Register BW PPE 07/11/20	21 MON uploads due 5 pm Pay Run ID MN073120 Processing MON PPE 07/31/20 NO OFF-CYCLE THIS WEEK *	22 Processing MON PPE 07/31/20 PULL DEADLINE 10 AM: BW PPE 07/04/20 NO OFF-CYCLE THIS WEEK *	23 Processing MON PPE 07/31/20	24 Run Payroll Register MON PPE 07/31/20 BW PPE 07/11/20 PAYDAY (Pay Run ID BW070420) NO OFF-CYCLE THIS WEEK *	25/26 PPE 07/25/20 Pay Run ID BW072520 Earn dates 07/12-07/25/20
27	28 OC072320 uploads due 5 pm	29 PULL DEADLINE 10 AM: MON PPE 07/31/20 Processing OC072320	30 BW uploads due 5 pm	31 MON PPE 07/31/20 PAYDAY Pay run ID MN073120 Processing BW PPE 07/25/20 OC072320 PAYDAY	

* No off-cycle payroll
Last updated 6/1/20

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ES International Tax

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International Tax Appointments

https://www.cu.edu/blog/hcm-community/hiring-international-employees-fall-review-reminders-direct-them-cu%E2%80%99s-0

New CU international employees must schedule an appointment to document their U.S. tax status.

June 29, 2020 by UIS Communications

▶ *International employees should not complete a W-4 on their own.*

▶ *Schedule a <u>virtual international tax appointment</u> as soon as possible, ideally before receiving their first paycheck.*

▶ *Employee Services can retroactively adjust W-4 withholdings, if an appointment is delayed.*

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What to bring to a tax appointment?

International employees should bring:

➢ *Bring passport, I-94 and immigration document*

➢ *Employees should be prepared to review their history presence in the United States and previous immigration statuses.*

International employees' employment eligibility must be verified by hiring managers through <u>Form I-9 processing</u>.

For more information, visit the <u>Employee Services international employee webpage</u>.

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International Student taxes

https://www.cu.edu/blog/hcm-community/international-students-scholarships-stipends-may-be-subject-tax-withholding-0

Scholarships and stipends for international students may be subject to tax withholding

June 29, 2020 by UIS Communications

► CU is required to deduct 14% tax for pre-payment of the students' tax year liability with the IRS.

► Gross payments and withheld taxes can be found on non-resident FORM 1042-S after the tax year closes.

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Tax on stipends and scholarships

https://www.cu.edu/blog/hcm-community/international-students-scholarships-stipends-may-be-subject-tax-withholding-0

Stipends:

► Stipends paid through HCM will have tax withheld when the International Tax Office is informed by the student or department in advance of the first payment.

  ► All international student stipend recipients hired with the 3200 job code series should be referred to the International Tax Office.

Scholarships:

➢ Taxable scholarships are identified by the International Tax Office during student bursar account reviews and the required tax is charged to their bursar accounts.

  ➢ *Contact your campus Bursar Office for any questions related to payment deadlines.*

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Campus Bursar Office Contacts

https://www.cu.edu/blog/hcm-community/international-students-scholarships-stipends-may-be-subject-tax-withholding-0

- ▶ **CU Boulder**
    - ▶ https://www.colorado.edu/bursar/

- ▶ **CU Denver**
    - ▶ http://www.ucdenver.edu/student-services/resources/CostsAndFinancing/StudentBilling/contact/Pages/default.aspx

- ▶ **CU Anschutz Medical Campus**
    - ▶ http://www.ucdenver.edu/anschutz/studentresources/StudentBilling/contact/Pages/default.aspx

- ▶ **CU Colorado Springs**
    - ▶ https://www.uccs.edu/bursar/

Email:

- ▶ **International Tax Office** - **IntlTax@CU.edu**

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International Employee

HOME | EMPLOYEE SERVICES | PAYROLL | INTERNATIONAL EMPLOYEE

International Employees

International Tax Appointments

Social Security Number Use

Foreign National Tax Resource license request and user guide

1042-S Tax Form

8233 Tax Form

Tax Reference for International Visitors

Tax Reporting and Withholding Implementation Policy

Form 8843 Resource Guide

International Employee

Tax resources

Take the stress out of U.S. tax filing with these resources for international students and employees.

Foreign National Tax Resource

Nonresident F and J visa students and employees can request Foreign National Tax Resource (FNTR) software starting in February. This intuitive tax software helps you understand U.S. tax filing requirements and complete federal tax forms online.

✅ Request an FNTR license

More tax resources

- Form 8843 Resources Guide
- 1042-S Tax Form
- Colorado Form 104 and Instructions
- Colorado Quick Answers - Individual Income Tax
- Income 6: Part-Year Residents and Nonresidents
- Income 28: Resident and Nonresident Aliens and Colorado Residents Living Abroad

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New International Employees

https://www.cu.edu/blog/work-life/new-international-employees-schedule-your-required-appointment-international-tax
https://booknow.appointment-plus.com/43rspqeq/

International AP Payments

https://www.cu.edu/docs/international-ap-payments

International AP Payments

ℹ Purpose

This document will help you identify the types of payments that can be made to international visitors in various immigration statuses and the required documentation in each case.

Select the necessary payment type and expected immigration status to determine what's permissible. Please contact an international tax specialist by alpha-range, per the last name of your guest, in advance of the visit to discuss any questions you may have.

A-L:
Kendra.Zafiratos@cu.edu
303-735-5534

M-Z:
Alicia.Dandeneau@cu.edu
303-735-0816

📅 Last updated: 5/2/2019

📥 Download this form below

🔗 ATTACHMENTS
📊 **International Accounts Payable (A/P) Payment Matrix**

ES Benefits Updates

https://www.cu.edu/blog/work-life

Benefits Confirmation New Plan Year

https://www.cu.edu/blog/hcm-community/short-term-disability-benefits-classified-staff-will-change-july-1

YOU'VE PICKED YOUR BENEFITS. NOW WHAT?

Here's what to expect and prepare for the plan year starting July 1

The benefits plan year begins **July 1.**

Check your enrollment
- ▶ within the employee portal.

Watch your mailbox -- ID Cards
- ▶ For Anthem-administered CU Health Plan, new ID cards from Anthem and CVS Caremark are coming. New plan? You'll get a new ID card.

CVS Caremark Welcome Kits

- ▶ Beginning July 1, CVS Caremark will manage pharmacy benefits for Anthem-administered CU Health Plans (Exclusive, Extended, High Deductible and Medicare). You can find more details on our CVS Caremark FAQ page.

- ▶ The welcome kit from CVS Caremark contains your Member ID card, benefits overview, details on filling prescriptions and registering for online account access.
No Card yet? Call CVS Caremark's dedicated CU Health Plan number at 1-888-964-0121.

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Leaving CU

Resources to support your campus as you work with Faculty and Staff that are departing from the university.

Leaving CU website

Electronic employee guide with links to valuable resources: Leaving CU

Retirement Ready

https://www.cu.edu/employee-services/retirement-ready

Retirement Ready website

- Electronic employee guides to prepare for retirement meetings with a benefit professional:

    - Retirement Ready 401(a) Participants,

    - Retirement Ready PERA Participants

- These user-friendly tools will help the employee navigate things like: final pay, W2s, benefits, COBRA and prepare them for their retirement meeting with a benefits professional.

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Payroll and Benefit Orientations

▶ We have launched the new Payroll and Benefit New Hire Digital Orientation on the website.

1. New Hire Basics (8 min)
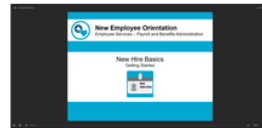
2. CU Health Plans (21 min)
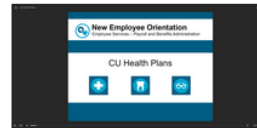
3. Pretax Savings (14 min)
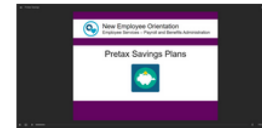
4a. Life and Disability (11 min)

Faculty and University Staff

4b. Life and Disability (12 min)

Classified Staff

5a. Mandatory Retirement Plans (12 min)

Faculty and University Staff

5b. Mandatory Retirement Plans (10 min)

Classified Staff

6. Voluntary Retirement Plans (8 min)

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Payroll and Benefit Orientations

▶ New guides available in English and Spanish.

Guides
- New Hire Fact Sheet
- Benefits Package Guide for Faculty & University Staff
- Benefits Package Guide for Classified Staff
- Guía Completa de Beneficios - Facultad y Personal de la Universidad
- Guía Completa de Beneficios - Personal Clasificado

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PERA Contributions

https://www.cu.edu/blog/hcm-community/new-pera-legislation-introduced-employee-monthly-contribution-rates-change-still

Effective July 1, 2020

COLORADO PERA.

Reminder: Contribution rate changes effective July 1, 2020

Member (employee) contribution rate changes:

- Second of three phased-in rate increases of 0.75% (does not apply to Local Government Division)
- Automatic adjustment provision increase of 0.50%
- **Total member contribution Increase of 1.25%** (Local Government Division increase of 0.50%)

Employer contribution rate changes:

- Automatic adjustment provision increase of 0.50%

Note: These rate changes are effective with all payrolls that have payroll end dates in July 2020. For example, if the payroll dates are June 1, 2020, through June 30, 2020, the current contribution rates apply. If the payroll dates are June 15, 2020, through July 14, 2020, the new rates apply (see below).

Contribution Rates Effective July 1, 2020

Division	Member Contribution Rate	Employer Contribution Rate
State	10.00%	20.90%

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Short-term disability changes

https://www.cu.edu/blog/hcm-community/short-term-disability-benefits-classified-staff-will-change-july-1

Short-term disability benefits for Classified Staff will change July 1 July 1, 2020 by Employee and Information Services

Short-term disability benefits for CU Classified Staff went into effect on July 1, spurred by similar changes by the State of Colorado.

About the benefit

▶ Eligible Classified Staff automatically enrolled on the first day of their benefits eligibility.

▶ Premiums are paid by CU.

▶ This benefit pays 60% of the first $3,850 of an employee's weekly pre-disability earnings, up to a maximum weekly benefit of $2,310.

▶ Income is taxable when employees file a claim.

▶ Benefits last 180 days, minus a 30-day waiting period.

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What's changing?

▶ During the 30-day waiting period before benefits begin, employees are required to use accrued leave, including accrued annual (vacation) leave if accrued sick leave has been exhausted.

▶ Employees no longer need to exhaust their sick leave to begin receiving the short-term disability benefit.

▶ When an employee is receiving disability payments, they may choose to augment the short-term disability benefit payment with accrued sick leave first, then annual (vacation) leave to make themselves whole, earning 100% of their pre-disability earnings.

Details: Disability webpage for Classified Staff

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Tuition Assistance Benefit

https://www.cu.edu/tab

The Tuition Assistance Benefit application will open for the fall 2020 semester in early August. Employees will receive an email notification at that time.

Fall 2020 Tuition Assistance Benefit application deadlines by campus of registration are:

▶ CU Denver and CU Anschutz: September 2, 2020

▶ CU Colorado Springs: September 10, 2020

▶ CU Boulder: September 11, 2020

Please visit cu.edu/tab for more information!

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ES Employee Learning and Development (ELD)

HCM Upcoming Webinars

Faculty Contracts

Description: Get a handle on setting up faculty contracts. In this session, we'll review contract set-up fields and the effect of contract-related begin and end dates. You will get to look at pay rate changes and the renewal process as well as how contract pay (CRG) and earnings not paid (ENP) are calculated. Also, see how contract details information effects budgeting and funding setup. And finally, see how the accrual process posts to the general ledger (GL).

Date: Tuesday, July 21

Time: 3-4 pm

Calculating a Paycheck

Description: Let's take a look at what affects pay, including job data compensation, pay entries, holidays, and additional pay. This webinar also reviews entering and uploading time through CU Time, ePER transactions, and Create Additional Pay. Learn how taxes and deductions are calculated, and how post-processing distributes funding across the entire paycheck.

Date: Tuesday, August 18

Time: 3-4 pm

Register

Register

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Feedback, suggestions?
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HCM Recorded Webinars

https://www.cu.edu/hcm-community-training

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HCM Data Feature Focus

Year End Leave Queries

Reports for leave summaries and sweep

38	Leave - Fiscal Year End Review	Returns Sick and Vacation balances as of the last day of a specified fiscal year. For purposes of reviewing leave balances to be certified.	308 CUES_HCM_LEAVE_FYE_BALANCES
39	Leave Accrual Detail	This query returns leave information that corresponds with the CU Leave Accruals Summary page, Detail tab. Results are limited to one employee at a time.	22506 CUES_HCM_LEAVE_ACCRUAL_DTL
40	Leave Accrual Summary	This query returns leave information that corresponds with the CU Leave Accruals Summary page, Summary tab. The classified job flag and classified staff length of service (LOS) will always show the most current information available.	19358 CUES_HCM_LEAVE_ACCRUAL_SUM
41	Leave Adjustments Confirmed	Finds adjustments in Sick and Vacation time.	393 CUES_HCM_LEAVE_ADJUST_CONFIRM
42	Leave Certification Status	This query returns annual leave certification information for active employees. Note - When using the "Not Certified ONLY?" prompt, you must specify a fiscal year to ensure correct results.	1429 CUES_HCM_LEAVE_CERT_STATUS
43	Leave Sweep 2020	This query returns leave sweep/adjustment calculations as of June 30, 2020 for each benefit record belonging to currently active employees.	4012 CUES_HCM_LEAVE_SWEEP
44	Leave Taken	This query returns information on a variety of leave codes that have been processed through payroll.	2822 CUES_HCM_LEAVE_TAKEN

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Notes on Leave Queries

The balance of the tables only update once per pay cycle.

The balances lag one month behind when the leave was accrued or taken.

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Leave Sweep

- CUES_HCM_LEAVE_SWEEP has been updated for 2020
- June leave will first be deducted and people still above the maximum will have their extra leave removed.
- There is a tool in the works to calculated people who may get swept in the future.

CUES_HCM_LEAVE_SWEEP - Leave Sweep 2020

Business Unit (Optional) USYS 🔍
Node (Optional) [   ] 🔍
Dept ID (Optional) [   ] 🔍
Empl ID (Optional) [   ] 🔍

[View Results]

Download results in : Excel SpreadSheet CSV Text File XML File (49 kb)

View All

First 1-97 of 97 Last

Row	Empl ID	Last Name	First Name	Ben Record	Leave Program	Leave LOS	Max Allowable Sick Leave	Frozen Sick Leave	Individual Max Sick Leave	Accrued Sick Leave	Excess Sick Leave	Sick Leave Adjustment	Max Allowable Vacation Leave	Accrued Vacation Leave	Intermed Vacation Adjustment	20% (16 Max) Excess Sick Leave	Final Vacation Adjustment
1				0	Exmpt Prof								352	370.06			-18.06
2				0	Exmpt Prof								352	384.22			-32.22
3				0	Exmpt Prof								352	381.08			-29.08
4				0	Classified	290	360	0.00	360.00	296.89	0.00	0.00	336	413.39	-77.39	0.00	-77.39
5				0	Exmpt Prof								352	414.78			-62.78
6				0	Exmpt Prof								352	461.54			-109.54
7				0	Exmpt Prof								352	369.25			-17.25
8				0	Exmpt Prof								352	407.50			-55.50
9				0	Exmpt Prof								352	373.95			-21.95
10				0	Exmpt Prof								352	457.73			-105.73
11				0	Exmpt Prof								352	413.74			-61.74
12				0	Exmpt Prof								352	480.04			-128.04
13				0	Exmpt Prof								352	444.04			-92.04
14				0	Exmpt Prof								352	411.60			-59.60
15				0	Exmpt Prof								352	448.04			-96.04
16				0	Exmpt Prof								352	374.79			-22.79
17				0	Exmpt Prof								352	383.60			-31.60
18				0	Exmpt Prof								352	440.04			-88.04
19				0	Exmpt Prof								352	364.81			-12.81
20				0	Exmpt Prof								352	371.47			-19.47
21				0	Exmpt Prof								352	448.08			-96.08
22				0	Classified	290	360	0.00	360.00	379.09	19.09	-19.09	336	233.47	0.00	3.81	3.81
23				0	Exmpt Prof								352	385.54			-33.54
24				0	Exmpt Prof								352	404.54			-52.54
25				0	Exmpt Prof								352	391.09			-39.09
26				0	Exmpt Prof								352	480.08			-128.08

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Leave Accrual Summary

▶ **Provides a summary of accrued vacation and sick leave**

▶ **You can click the detail link and it will run CUES_HCM_LEAVE_ACCRUAL_DTL**

Leave Accrual Detail

CUES_HCM_LEAVE_ACCRUAL_DTL will show a line of data for each accrued or taken leave.

CUES_HCM_LEAVE_ACCRUAL_DTL - Leave Accrual Detail

Empl ID [2( ] 🔍
Ben Rcd (Optional) [ ]
Plan Type (Optional) [ ] 🔍

[View Results]

Download results in :   Excel SpreadSheet   CSV Text File   XML File   (31 kb)

View All   First 1-68 of 68 Last

Row	Empl ID	Last Name	First Name	Ben Rcd	Plan Type	Plan Description	Accrual Date	Hours Pre HRMS	Cumulative Hours Earned	Hours Earned This Month	Cumulative Hours Adjust	Cumulative Hours Taken	Hours Processed This Month	Hours Taken Unprocessed	Hours Adjusted Unprocessed	Balance
1				0	50	Sick	06/19/2020	0.00	320.91	10.00	0.00	21.25	0.00	0.00	0.00	299.66
2				0	50	Sick	05/20/2020	0.00	310.91	10.00	0.00	21.25	0.00	0.00	0.00	289.66
3				0	50	Sick	04/22/2020	0.00	300.91	10.00	0.00	21.25	0.00	0.00	0.00	279.66
4				0	50	Sick	03/23/2020	0.00	290.91	10.00	0.00	21.25	8.00	0.00	0.00	269.66
5				0	50	Sick	02/20/2020	0.00	280.91	10.00	0.00	13.25	0.00	8.00	0.00	259.66
6				0	50	Sick	01/23/2020	0.00	270.91	10.00	0.00	13.25	0.00	0.00	0.00	257.66
7				0	50	Sick	12/19/2019	0.00	260.91	10.00	0.00	13.25	0.00	0.00	0.00	247.66
8				0	50	Sick	11/20/2019	0.00	250.91	10.00	0.00	13.25	0.00	0.00	0.00	237.66
9				0	50	Sick	10/23/2019	0.00	240.91	10.00	0.00	13.25	0.00	0.00	0.00	227.66
10				0	50	Sick	09/20/2019	0.00	230.91	10.00	0.00	13.25	0.00	0.00	0.00	217.66
11				0	50	Sick	08/22/2019	0.00	220.91	10.00	0.00	13.25	0.00	0.00	0.00	207.66
12				0	50	Sick	07/24/2019	0.00	210.91	10.00	0.00	13.25	0.00	0.00	0.00	197.66
13				0	50	Sick	06/20/2019	0.00	200.91	10.00	0.00	13.25	0.00	0.00	0.00	187.66
14				0	50	Sick	05/22/2019	0.00	190.91	10.00	0.00	13.25	0.00	0.00	0.00	177.66
15				0	50	Sick	04/22/2019	0.00	180.91	10.00	0.00	13.25	0.00	0.00	0.00	167.66
16				0	50	Sick	03/21/2019	0.00	170.91	10.00	0.00	13.25	0.00	0.00	0.00	157.66
17				0	50	Sick	02/20/2019	0.00	160.91	10.00	0.00	13.25	0.00	0.00	0.00	147.66
18				0	50	Sick	01/23/2019	0.00	150.91	10.00	0.00	13.25	0.00	0.00	0.00	137.66
19				0	50	Sick	12/20/2018	0.00	140.91	10.00	0.00	13.25	0.00	0.00	0.00	127.66
20				0	50	Sick	11/20/2018	0.00	130.91	10.00	0.00	13.25	3.75	0.00	0.00	117.66
21				0	50	Sick	10/23/2018	0.00	120.91	10.00	0.00	9.50	0.00	3.75	0.00	107.66
22				0	50	Sick	09/20/2018	0.00	110.91	10.00	0.00	9.50	1.50	0.00	0.00	101.41
23				0	50	Sick	08/23/2018	0.00	100.91	10.00	0.00	8.00	0.00	1.50	0.00	91.41
24				0	50	Sick	07/24/2018	0.00	90.91	10.00	0.00	8.00	8.00	0.00	0.00	82.91
25				0	50	Sick	06/21/2018	0.00	80.91	10.00	0.00	0.00	0.00	8.00	0.00	72.91
26				0	50	Sick	05/22/2018	0.00	70.91	10.00	0.00	0.00	0.00	0.00	0.00	70.91
27				0	50	Sick	04/20/2018	0.00	60.91	10.00	0.00	0.00	0.00	0.00	0.00	60.91
28				0	50	Sick	03/22/2018	0.00	50.91	10.00	0.00	0.00	0.00	0.00	0.00	50.91
29				0	50	Sick	02/20/2018	0.00	40.91	10.00	0.00	0.00	0.00	0.00	0.00	40.91
30				0	50	Sick	01/23/2018	0.00	30.91	10.00	0.00	0.00	0.00	0.00	0.00	30.91
31				0	50	Sick	12/20/2017	0.00	20.91	10.00	0.00	0.00	0.00	0.00	0.00	20.91
32				0	50	Sick	11/21/2017	0.00	10.91	10.00	0.00	0.00	0.00	0.00	0.00	10.91

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CU Reported Time

▶ CUES_HCM_REPORTED_TIME

▶ This query will return a sum of reported time and approval information.

▶ One of the methods being used to load furlough data.

▶ Employees making $60,000 or more will have a negative DK3 earnings code which will deduct 4.6% of their salary over the course of 12 months.

▶ **Expires on June 30th 2021.**

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CU Reported Time

Additional Pay

- ► CUES_PAY_ADDITIONAL_PAY

- ► Returns a list of employees with additional pay entries within a specified date range

- ► The other methods being used to load furlough information

- ► Employees making $60,000 or more will have a negative RPF earnings code which will deduct 4.6% of their salary over the course of 12 months

- ► **Expires on June 30th 2021.**

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Additional Pay

CUES_PAY_ADDITIONAL_PAY - Additional Pay

First Eff Date (Optional) 06/01/2020
Last Eff Date (Optional) 07/31/2020
Empl ID (Optional)
Business Unit (Optional)
Node (Optional)
Dept ID (Optional)
Job Code (Optional)
Earn Code (Optional)

View Results

Download results in :   Excel SpreadSheet   CSV Text File   XML File   (14 kb)

View All   First 1-28 of 28 Last

Row	Name	Empl ID	Empl Rcd	Earn Code	Eff Date	Addl Seq #	Business Unit	Dept ID	Dept Name	Job Code	Job Title	Position Nbr	Combo Code	Other Pay	Earn End Dt	Goal Amount	Goal Balance
1			0	SVP	07/01/2020	1	UCB	10018	Athletics-Business Affairs	2531	Asst Athletic Coach	00152094	12091699	20000.00	02/14/2021	0.00	250000.00
2			0	AMP	07/01/2020	1	UCD	39998	Retirees UCD	5101	Faculty Retiree ORP	00775743	62846322	262.13		0.00	0.00
3			0	SUP	06/01/2020	1	UAMC	20353	SOM-EM MED CLINICAL	1105	Instructor	00744823		6757.67		0.00	0.00
4			0	ADS	07/01/2020	1	UCCS	40236	VCSA-STUDENT LIFE	2500	Student Services Director	00415704	42051843	260.00	12/31/2020	0.00	0.00
5			0	AMP	06/01/2020	1	UCB	10623	Retirees UCB	5101	Faculty Retiree ORP	00774651		262.13		0.00	0.00
6			0	SUP	06/01/2020	1	UAMC	20120	SOM-PHARM GENERAL OPERATIONS	1102	Associate Professor	00728097	63021420	433.33	06/30/2020	0.00	0.00
7			0	AMP	07/01/2020	1	UAMC	29998	Retirees UAMC	5101	Faculty Retiree ORP	00775752	62846322	262.13		0.00	0.00
8			0	AMP	06/01/2020	1	UCB	10623	Retirees UCB	5101	Faculty Retiree ORP	00775184		153.73		0.00	0.00
9			0	ADS	07/01/2020	1	UCCS	40236	VCSA-STUDENT LIFE	2835	Program Assistant II	00419113	42051843	190.00	12/31/2020	0.00	0.00
10			0	AMP	06/01/2020	1	UAMC	29998	Retirees UAMC	5110	Exmpt Prof Retiree ORP	00774829		262.13		0.00	0.00
11			0	AMP	06/01/2020	1	UCB	10623	Retirees UCB	5101	Faculty Retiree ORP	00774632		153.73		0.00	0.00
12			2	ADS	06/01/2020	1	UCB	10080	Coop Inst Res/Envrm Sci - Dir	1306	Research Associate	00677082	13013098	363.00	12/31/2020	0.00	0.00
13			0	AMP	06/01/2020	1	UAMC	29998	Retirees UAMC	5101	Faculty Retiree ORP	00775141	62846322	262.13		0.00	0.00
14			0	DPD	06/01/2020	1	UCCS	40095	VCAF-FAC-ADMIN OP	D6D3XX	Structural Trades III	00400732	42000282	232.90	10/31/2020	0.00	0.00
15			0	AMP	07/01/2020	1	UCB	10623	Retirees UCB	5101	Faculty Retiree ORP	00726264		153.73		0.00	0.00
16			0	AMP	06/01/2020	1	UCD	39998	Retirees UCD	5101	Faculty Retiree ORP	00774833	62846322	153.73		0.00	0.00
17			0	AMP	06/01/2020	1	UAMC	29998	Retirees UAMC	5110	Exmpt Prof Retiree ORP	00774834	62846322	262.13		0.00	0.00
18			0	AMP	06/01/2020	1	UCD	39998	Retirees UCD	5101	Faculty Retiree ORP	00774648		262.13		0.00	0.00
19			0	SUP	07/01/2020	1	UAMC	20127	SOM-PHYS GENERAL OPERATIONS	1103	Asst Professor	00007606	63016896	874.00	12/31/2020	0.00	0.00
20			0	AMP	07/01/2020	1	UAMC	29998	Retirees UAMC	5110	Exmpt Prof Retiree ORP	00775854	62846322	153.73		0.00	0.00
21			0	TPD	06/01/2020	1	UCD	30116	CAP-Admin & Instruction Svcs	2581	Executive Assistant	00351628	61018454	750.00	09/30/2020	0.00	0.00
22			0	AMP	06/01/2020	1	UCB	10623	Retirees UCB	5101	Faculty Retiree ORP	00774649		262.13		0.00	0.00
23			0	AMP	06/01/2020	1	UCB	10623	Retirees UCB	5110	Exmpt Prof Retiree ORP	00774954		153.73		0.00	0.00
24			0	AMP	06/01/2020	1	UAMC	29998	Retirees UAMC	5101	Faculty Retiree ORP	00775863		262.13		0.00	0.00
25			0	AMP	07/01/2020	1	UAMC	29998	Retirees UAMC	5101	Faculty Retiree ORP	00775864	62846322	262.13		0.00	0.00
26			0	SUP	06/01/2020	1	UAMC	20353	SOM-EM MED CLINICAL	1105	Instructor	00744889		3803.93	06/01/2020	0.00	0.00
27			0	APF	06/01/2020	1	UCCS	40045	EAS-Computer Science	1104	Senior Instructor	00470321	43000494	2000.00	07/31/2020	4000.00	2000.00

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Furlough Return From Leave

▶ There is another
report called CUES_HCM_FURLOUGH_RETURN_FL

- ▶ Show employees who went on full Furlough but
  are returning

- ▶ Looks for employees that had LOA action (Leave
  of Absense) with VFA reason code who now have an
  RFL (return from leave) code.

Process Scheduler

The Process Scheduler tool in HCM allows large reports to be scheduled and run by system hardware as system resources allow, rather than immediately on demand. This allows much larger reports to be run successfully without "timing out".

Step-by-Step:

▶ In HCM, use the following Navigation: **Main Menu>Reporting Tools>Query>Query Manager**

▶ In the blank "begins with" box, enter the name of the query to be run. This will always be the technical name of the query, and will always start with "CUES_".

▶ Click on the SEARCH button.

▶ Find the query, as well as several options for running the query. Click on the word "Schedule" in the Schedule column. The Scheduled Query page should appear.

▶ On the Scheduled Query page, you will see three boxes.

  ▶ "Private Query" should already be "N".

  ▶ "Query Name" should already be the name of the query you want to run.

  ▶ "Run Control ID" should be blank.

▶ Enter a run control ID in the blank box. If you already have one, use it. If not, we recommend using your last name. Then click the ADD button.

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Process Scheduler

▶ If a pop-up window appears, complete any report prompts just as you would if you were running the report from the HCM WorkCenter. (These prompts are part of the query and control the actual data that will appear in your report.) Then click on OK in the pop-up window. This should close the pop-up.

▶ On the Schedule Query page, enter a description of the query you are scheduling in the blank "*Description" box. We recommend using the common name of the query (ex. Dept. Personnel & Org Report) to avoid any confusion later.

▶ Now click on the OK button. The Process Scheduler Request window will pop up. Do not change any settings. Just click on the OK button in the pop-up window.

▶ Your report has been scheduled to run. At this point, our system hardware will take over and will process your report as system resources allow. This process can take a few seconds for small reports, or over an hour for very large reports.

▶ Now go to the Report Manager page in HCM using the following navigation: **Main Menu>Reporting Tools>Report Manager**. Click on "My Reports" A list of completed reports will be displayed. If your report is displayed, click on it. A pop-up window will appear, giving you the option to open the report with Excel, or to save the report.

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Process Scheduler

▶ If you do not see your report, it has not finished processing yet. In that case, click on "Process Monitor". You should see your query listed here. Please note the "Run Status" column. Completed reports will say "Success". Incomplete reports will say "Processing".

▶ Click on the REFRESH button. If the Run Status changes from "Processing" to "Success", proceed to the next step. If not, go get a cup of coffee. Processing may take a while. Click on the REFRESH button again. Still not done? Go watch a cat video on Youtube. Keep clicking the REFRESH button until the Run Status is "Success".

▶ Once your report appears, you will see it listed by name, as well as the details of the run. The Completion Date/Time should be today's date.

▶ Now click on the name of the query. The page should refresh and you should now see two files in the File List box. One is a .log file. It only contains the technical details of the processing run. The other file should correspond to the name of the query you ran and should have the file extension .CSV. Click on it.

▶ Click on Open to open the file in Excel. If a yellow warning box appears, click on its ALLOW button.

▶ Once the file is open in Excel, you should see the results of your report. The Excel file can then be edited and/or saved using normal Excel procedures.

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Questions

Q & A – Current Call

Q& A – Previous Call

Q & A – Previous Call

Questions from the June 2, 2020 call

Can you please provide the link to registering for future campus calls? Thank you.	https://www.cu.edu/hcm-community/events/hcm-campus-call https://cusystem.zoom.us/webinar/register/WN_P5tR9NkKRTCkXEXBik_GpQ
Furloughs-Holidays are still given based on FTE in job data, correct?	Holidays are based upon standard hours. Furloughs are managed by campus leadership.
Will these slides be shared after the meeting, and/or where can these examples be found on the ES website?	ES does email the slides after each presentation to each person who has registered.
When will payroll cutoff calendars be posted on website for August-December?	They are in process to be posted soon.
Is there a report that will give us length of service in a department? What about for effective date an employee became active in a new department number?	Unfortunately, due to the technical limitations of our software, it is not possible to create a reliable Length of Service report at this time. While there are fields in HCM which may appear useful for this purpose, all will produce significant errors when used for Length of Service reporting. If it becomes possible to create a reliable Length of Service report at some point in the future, it will be our first priority. Thank you for your patience and understanding.

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Q & A – Current Call

Questions from the July 7, 2020 call

Can we get a copy of the slides?	We will certainly send the slides to the email for each registered participant after each call with the questions and answers.
I saw the new Payroll & Benefit New Hire Digital Orientation on the website with English and Spanish. Shout out to Deborah & co. I appreciate you!	Thank you for the kind words!
FACTULTY CONTRACTS Was an email send out to faculty on the deadlines to update their pay for AY 20-21?	I confirmed with Carolyn Donadio in Payroll that an email was NOT sent by ES to faculty this year. The departments will communicate directly with their faculty.
FISCAL YEAR END BW PAYROLL I contacted payroll services to ask if the biweekly pay for the 06/14/20-06/27/20 pay period would pull from FY 2020 funds and was told that it should. However, I pulled a CU Data report and saw that that pay is showing on FY 2021. -- Will you confirm that I should request a PET for this?	The BW PPE 6/27/20 will be accrued to FY20 and posted to FY20. Stay tuned.
HCM DATA	
I don't see the Additional Pay query in HCM yet...is it yet to come?	This is a Data Team housekeeping issue. This query is in a folder that can only be accessed by the Payroll Team. We will review the query and try to move out to the WorkCenter if possible. Stay tuned!

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Q & A – Current Call

Questions from the July 7, 2020 call	
FURLOUGH	
(UCB) If the furlough leave does not go to CU Time, how do we make sure no one is overusing their 12 days?	(UCB) The campus HR offices are your best contact for furlough business process.
(UCB) Some of our continuous furloughed employees report that they are not accruing the full amount of vacation or sick leave as they should be.	(UCB) The campus HR offices are your best contact for furlough business process.
(UCB) An employee on continuous furlough should leave their timesheet blank correct? Thank you!	(UCB) The campus HR offices are your best contact for furlough business process.
(UCD/AMC) Our unit was instructed that the furlough day does need to be listed as 'furlough leave' in My Leave in all hourly, OT eligible employee timesheets specifically. Is this correct?	(UCD/AMC) The Denver campus there will be a payroll upload for the flat dock rate each month and HR is collecting the furlough concurrence forms with days off for their record. There is not to be a My Leave entry for a furlough day. (Susan Malone) For Denver and Anschutz there are not furlough entries into my leave. All are handled in CU Time. Reg hours should be entered for overtime eligible employees. (Florie Montoya) Please contact Dan Nunez or Loan La if you have questions regarding Denver/Anschutz furlough entries. (Florie Montoya)

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Q & A – Current Call

In general, paychecks and leave accruals are based on paid status and standard hours. In general, if an employee has a row in job data for a leave of absence - without pay (whatever the reason) for an entire pay period, neither a paycheck nor leave accruals will be generated. In general, an overtime eligible employee must account for their full standard hours each week. Missing hours will create a regular dock in pay (DK1).	In terms of furlough tracking, each campus has determined its own solution for furlough entries and time off tracking (both for exempt and overtime eligible). Contact your campus HR office to determine the process for your campus.
LEAVE SWEEP	
(UCB) My question is about Leave Sweeps. I know eligible personnel have up to 80 hours in excess of vacation leave, however it appears that the HCM system swept anyone OVER the OLD vacation max's hours. I have been in contact with our HRSC but have not heard back.	https://www.cu.edu/blog/ope/interim-changes-regent-policy-11e1-regarding-vacation-leave-accruals The decision to accrue and carry forward more than forty-four (44) days of vacation leave - as of July 1, 2020 will be approved by their respective executive leadership (president/ chancellor/designated delegates). Contact your campus HR to determine their campus specific decision and process.
(UCD/AMC) I received notice that the SOM was not approving exceptions to the leave sweep. Any clarifying information would be great.	Since the decision and process is a campus specific process, your campus HR will be able to provide the most information.
Are these leave reports with the new temporary max carryover amounts?	The leave reports reflect the actual accruals and default max balances in HCM (i.e., 44 days for faculty and university staff; classified max accrual/balance).

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References

▶ https://www.cu.edu/hcm-community

▶ https://www.cu.edu/hcm-community/hcm-projects/get-involved

Calendars

▶ https://www.cu.edu/hcm-community/events/hcm-biweekly-call

▶ https://www.cu.edu/hcm-community/pay-employees/payroll-production-calendars

Blogs

▶ https://www.cu.edu/uis/maintenance-matters

▶ https://www.cu.edu/blog/work-life

▶ https://www.cu.edu/blog/hcm-community/category/hcm-community-news

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Thank you for joining us.

Contact Employee Services

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- Opt. 2: Payroll and HCM
- Opt. 3: Benefits
- Opt. 4: Spanish/Español
- Opt. 5: CU Careers

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