Human Capital Management (HCM): Step-by-Step Guide

Putting an Employee on Leave and Returning from Leave

This guide describes putting an employee on leave, or returning an employee from leave, in HCM using a template-based transaction (TBT). A TBT is a streamlined method of entering data into HCM for a variety of employee changes and updates.

Leave can be paid, unpaid, or a short work break. When the employee returns from leave, follow the same process (using a return action and reason). If you have questions about which type of leave your employee is taking, please consult your campus HR.

Before You Begin

Before you begin, you should have the following information:
- Employee ID.
- Effective Date of the leave, or return from leave.
- Action and Reason for the leave.

Navigation tips:

▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:
1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.

The magnifying glass is called a look up and displays search results for you to select valid field values.

The book and checkmark lets you spell check text boxes.

The down arrow lets you hide, or collapse, sections you do not want to view.

Click the ▶ arrow to expand the section.

Beginning the Transaction

To enter a leave transaction:

1. From the HCM Community Users dashboard, click the **Transaction Launch Page** tile. The Transaction Launch Page appears. This page provides a single location for template based transactions.

2. In the Search Criteria section, type the **Empl ID**, or other personal identifying information you have.

3. From the **Search Option** list, select **Leave Request**. This is required. The search option helps determine which template pages to display that are correct for your transaction.

4. Click **Search**. The system searches HCM to find existing records of employees in the database that you have permission to update. Existing records include those for employees that are active, currently on a short work break or leave, as well as any future-dated transaction records that have been approved. HCM displays the results in the HCM Data table. If no results are returned, you may not have permission to access the record you are searching for.

5. From the HCM Data listing, select the checkbox of the employee (and job record, if applicable) that you are updating.

   Caution: Because employees may have more than one job, it's important to ensure you have the correct employee and job record before continuing. As only a few records are displayed at a time, you may need to page through the results to find the correct record, or search again using additional criteria.

6. Click **Submit**. The Enter Transaction Details page appears, displaying the name of the template you are using and required fields, which appear with an asterisk.

```
Template Based Transactions
Enter Transaction Details

The following transaction details are required.

                  Template        Direct Leave Request Template
   Organizational Relationship     Employee
                   Country         United States
                  *Empl ID   [        ]              [        ]

   *Employment Record Number  0 (Business Services Professional)  ∨
          *Job Effective Date  08/19/2020        📅
                   *Action                        ∨
              *Reason Code                        ∨

      [  Continue  ]     [   Cancel   ]

      [📧 Notify]
```

7. Verify that you have the correct employee by right-clicking the Related Actions wedge (◥) and viewing the CU Person Organizational Summary.

Entering Transaction Details

To put an employee on leave, or return an employee from leave:

1. Select a **Job Effective Date**. This is the date that the leave begins (or the date the employee is returning from leave). The default is today's date.

2. From the **Action** list, select an action. The Action you select, determines the Reasons the system will display in the next step. Actions include Return from Leave (and Return from Short Work Break), which should only be used when an employee returns from leave.
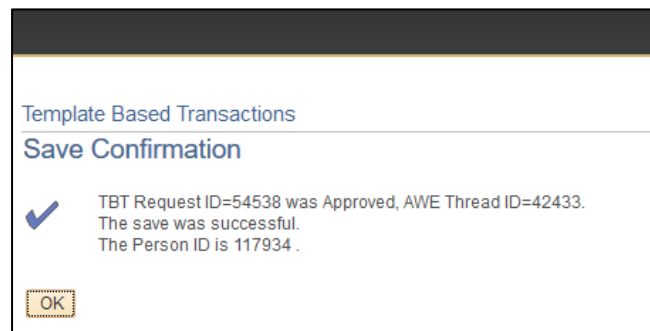
    Notes:

    - Paid Leave of Absence (PLA) is used for an employee on paid leave, using paid parental, sick or vacation time. Consult your campus HR, as they may use the FMLA reason code during a paid parental leave.

    - Leave of Absence (LOA) is used when an employee has exhausted all paid leave available and will begin unpaid leave. This action stops payroll from processing pay beginning on the effective date until returned from leave.

3. From the **Reason Code** list, select a reason.

4. Click **Continue**. The Enter Transaction Information page appears.
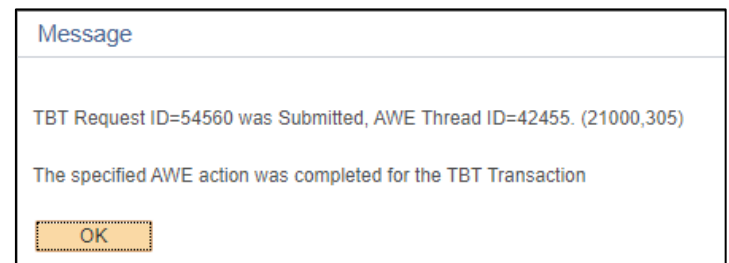
    Note: Employee information displays but is not editable. Review information for accuracy. If changes are needed, cancel this transaction, enter corrections, and create the leave TBT after the corrections have been approved.

5. Enter any comments in the **Job Notes** field.

6. If needed, attach documents:
   a. Click **Add Attachment**.
   b. In Attachment Title field, type a name for this document.
   c. Click Add 📎 .
   d. Click **Choose File**.
   e. Select a file and click **Open**.
   f. Click **Upload**.

7. Click **Save and Submit for Approval**. A message appears with the Request ID. Make a note of the request ID. The message will vary depending on whether your campus requires approval for the leave transaction. Below are examples of messages, one for a transaction that is self-approved and one for a transaction that requires approval.

Example of Save Confirmation message for self-approved transaction:	Example of Message box indicating a transaction has been submitted for approval:
Template Based Transactions **Save Confirmation** ✔ TBT Request ID=54538 was Approved, AWE Thread ID=42433. The save was successful. The Person ID is 117934 . OK	Message TBT Request ID=54560 was Submitted, AWE Thread ID=42455. (21000,305) The specified AWE action was completed for the TBT Transaction OK

8. Click **OK** from the message box. If approval is required for the transaction, a Further Processing Required page appears.

9. Click **OK**. The system returns you to the Enter Transaction Details page; you can close this tab on your browser.

Refer to *Transaction Status, Drafts, and Pushbacks* for information about checking the status and approval of your transaction.