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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

My Leave for HCM Community Members

This guide describes tasks that HCM Community Users can perform in My Leave, the university's time-keeping system. HCM Community Users include payroll and personnel liaisons (PPLs) and department users who are authorized to update data for their department.

As a user of My Leave, you should already have set up your own preferences as described in *My Leave Basics: Setting Preferences and Entering Time Step-by-Step Guide*.

If you are a supervisor wanting to approve time or designate a proxy, refer to *My Leave for Supervisors Step-by-Step Guide*.

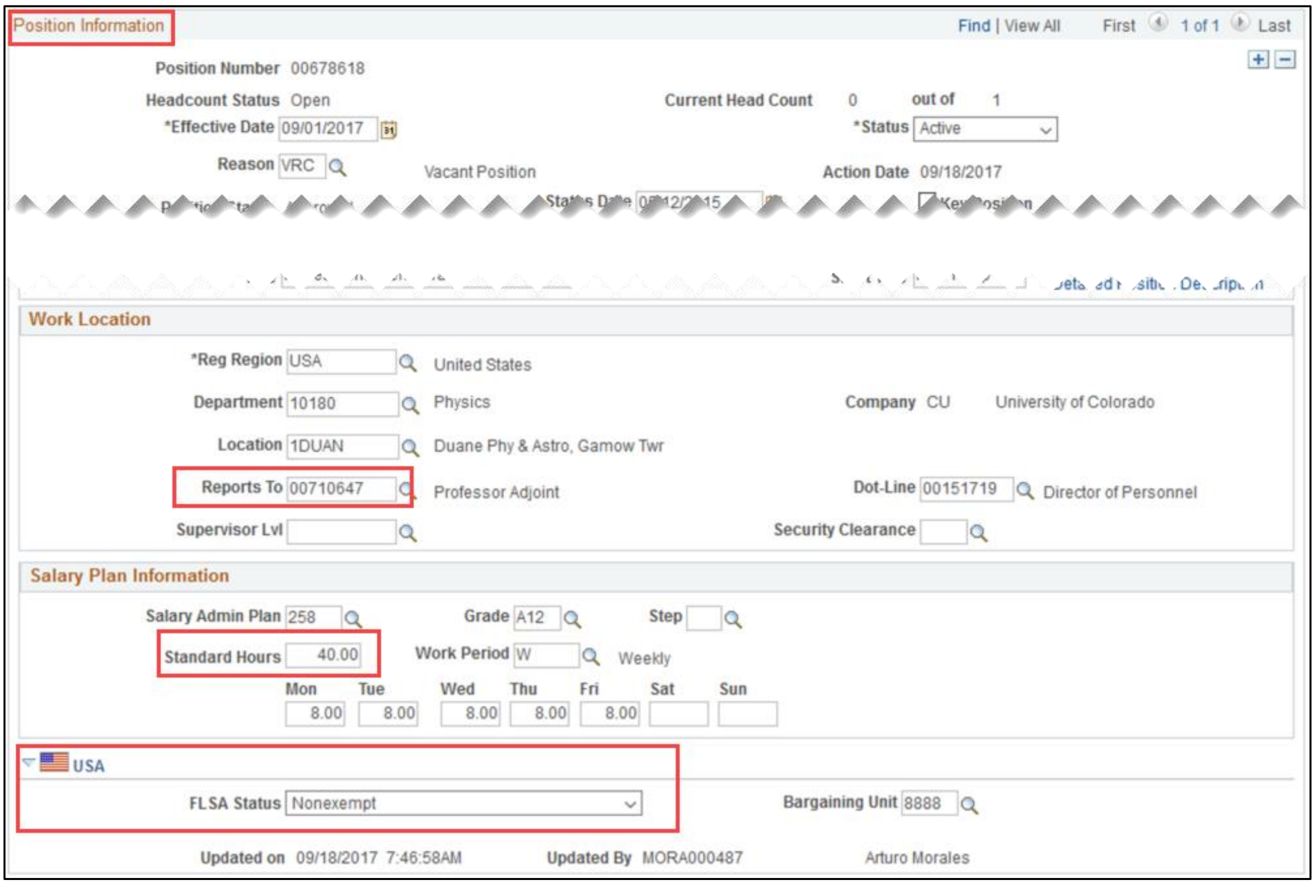
Contents

Maintaining Accurate Position and Job Data

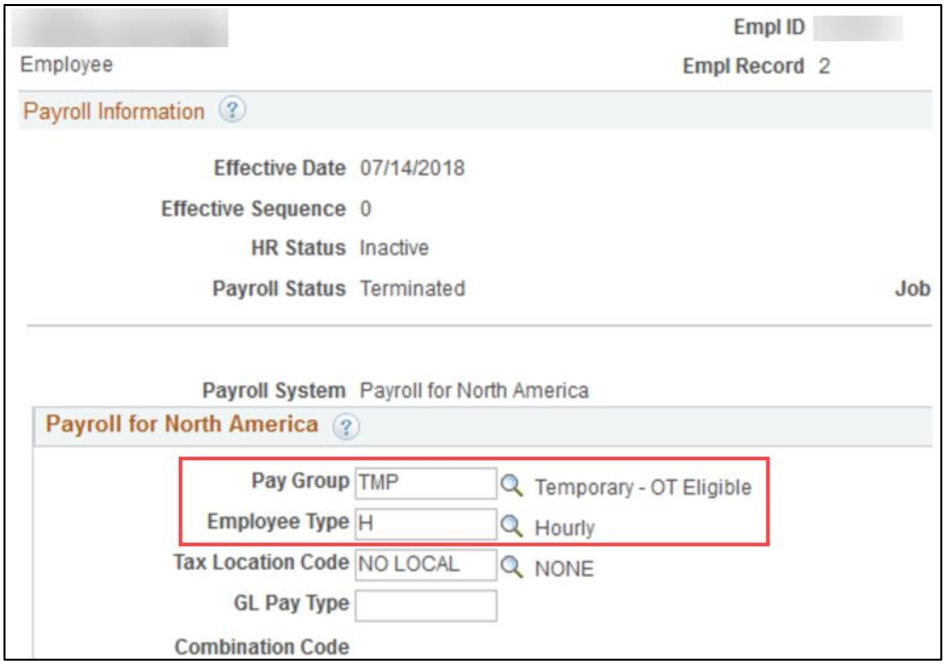
Because My Leave is integrated with HCM Position data, Job data, and CU Time, PPLs and Department users should regularly review and update Position and Job data fields for My Leave to process correctly. When changes are made in Position and Job, they are automatically reflected in My Leave.

The following fields from Position data feed to an employee's Job information, and then to My Leave:

- Reports to (position number) – The person in this position approves timesheets and leave requests in My Leave for the employee.
- Standard Hours – Used by My Leave to calculate earnings coded as Additional Time Straight (ATS), Additional Regular Hours (XRG), Overtime (OTM), and Compensatory Earned (CME) for non-exempt employees.
- FLSA Status – Exempt or non-exempt for overtime calculations.



Job information comes from the position, except for Pay Group and Employee Type (Hourly/Salaried). These values come from Job Data and are also fed to My Leave.



Note: If Position data and Job data do not agree, the Update Incumbents option was not selected in Position data when an update was made. This can be corrected by creating a position change with the Update Incumbents option selected. Refer to *Updating a Position Step-by-Step Guide* for more information.

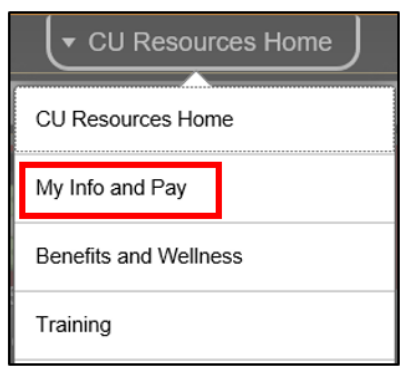
Navigating to My Leave

Department users and PPLs can access My Leave and review all of the department employees' timesheets.

From the portal, open My Leave using one of the following options:

- Click the **My Leave** tile:

- Click **CU Resources Home**> **My Info and Pay**> **My Leave**:

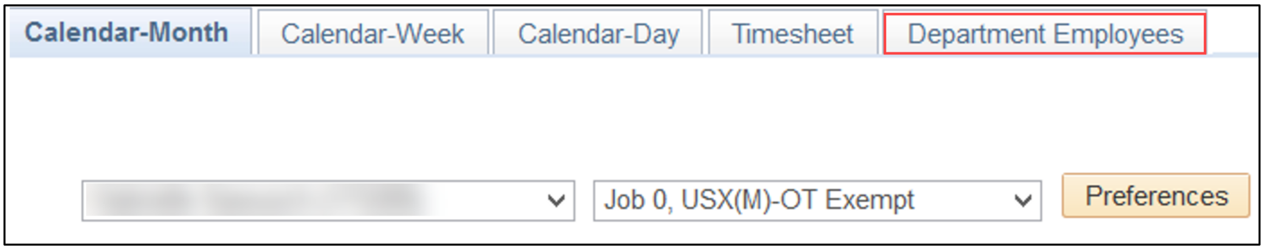


My Leave displays the Calendar-Month page.

Reviewing Employee Time Worked and Timesheets

As a department user, you have an additional tab labelled Department Employees. This tab lets you review the calendar and timesheets of employees in your department.

Reviewing Time Worked

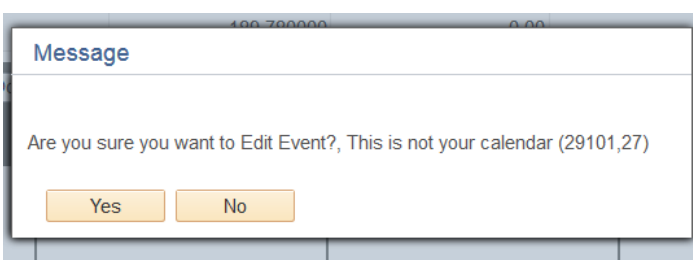


To review an employee's time worked:

1. Select the **Department Employees** tab.
2. Type the employee ID of the employee.
3. Click **Search**.
4. Select **View Calendar**. From this tab you can review the employee's time worked by the calendar month or week.

   Notes:

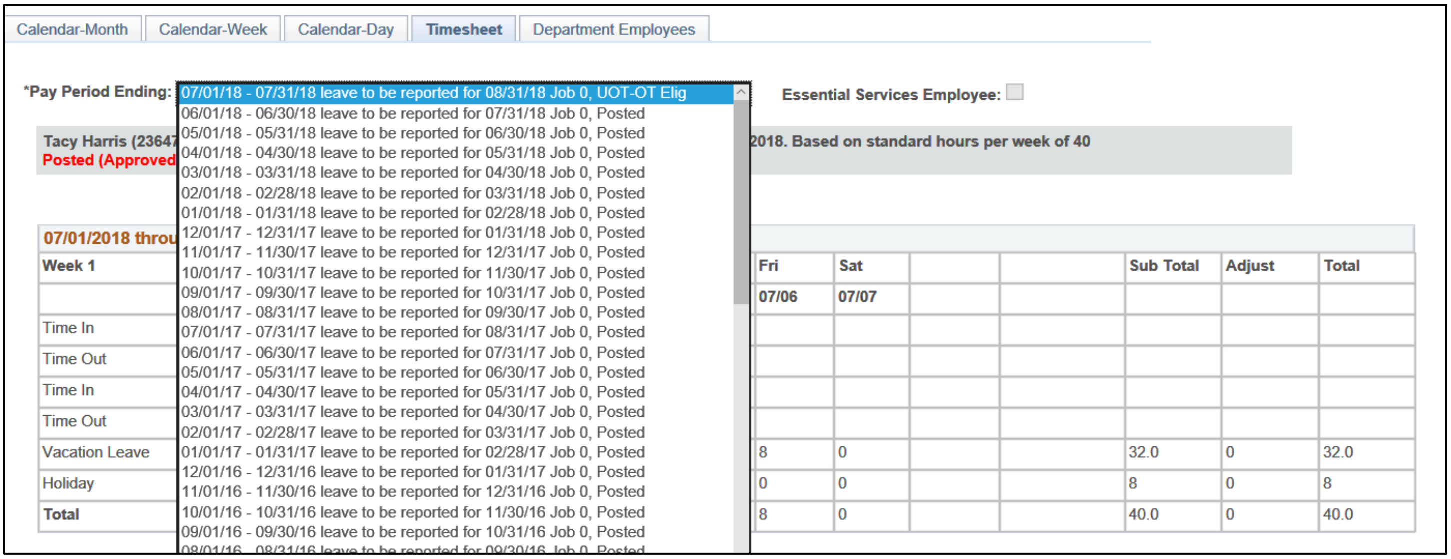
   - Employees are responsible for reporting their time correctly, adding time worked, and requesting leave. At the end of the time period, employees should certify and submit timesheets to their approver.
   - Department users have the ability to make changes to timesheets, but should only do so if it is a business necessity.
   - You will receive a notification message warning that you are making changes to another employee's calendar.



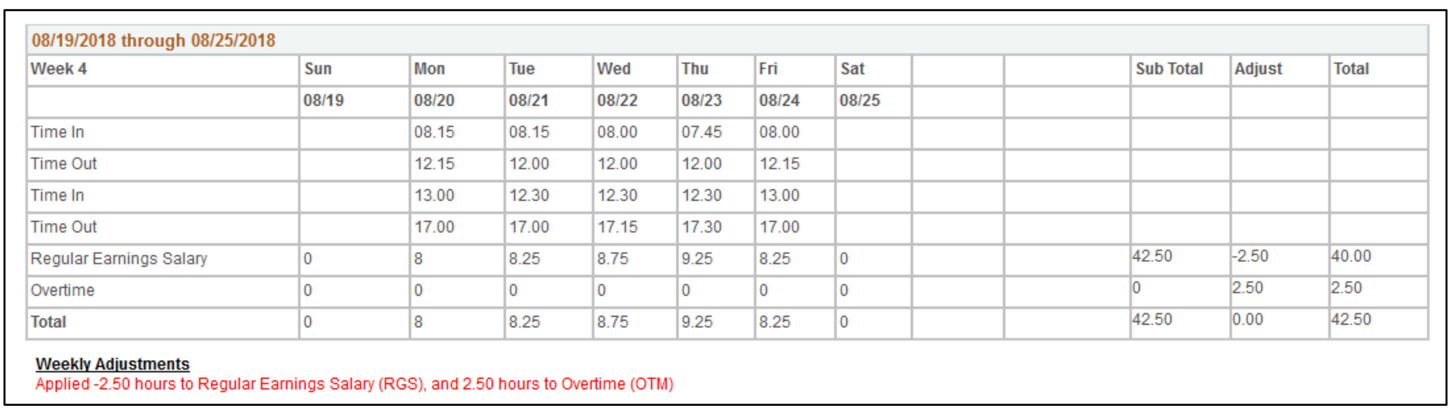
Reviewing a Timesheet

To review an employee's timesheet:

1. From the Calendar view, select **Timesheet**. The system displays the most current timesheet. If you want to review multiple timesheets select the down arrow from the **Pay Period Ending** drop-down and select the time period you want to view.



My Leave displays a week-by-week detailed listing of hours worked. If an employee works overtime or additional time straight, the system calculates the time and totals by week.



08/19/2018 through 08/25/2018

Week 4	Sun	Mon	Tue	Wed	Thu	Fri	Sat			Sub Total	Adjust	Total
	08/19	08/20	08/21	08/22	08/23	08/24	08/25					
Time In		08.15	08.15	08.00	07.45	08.00						
Time Out		12.15	12.00	12.00	12.00	12.15						
Time In		13.00	12.30	12.30	12.30	13.00						
Time Out		17.00	17.00	17.15	17.30	17.00						
Regular Earnings Salary	0	8	8.25	8.75	9.25	8.25	0			42.50	-2.50	40.00
Overtime	0	0	0	0	0	0	0			0	2.50	2.50
Total	0	8	8.25	8.75	9.25	8.25	0			42.50	0.00	42.50

Weekly Adjustments
Applied -2.50 hours to Regular Earnings Salary (RGS), and 2.50 hours to Overtime (OTM)

The bottom of the timesheet summarizes the hours. Time being sent to CU Time is indicated with a Y in the Send to HRMS column. A SpeedType may be added to the hours by selecting the Edit button.

Totals

Send To HRMS	Earn Code	Description	Hours	Rate	Total
N	RGS	Regular Earnings Salary	181.25	1	181.25
Y	OTM	Overtime	5.00	1	5.00
		TOTAL:	186.25		186.25

Speed Types

Speed Type	Send To HRMS	Earn Code	Description	Hours	Rate	Total	Edit
	Y	OTM	Overtime	5.00	1	5.00	Edit

2. Click **View My Calendar** to return to your personal My Leave calendar.

Today is October 30, 2015 | View My Calendar | Add Time | Month | Week | Day

Reading My Leave Balances

You can also see balances in Calendar view. Balances listed in My Leave are updated after each monthly payroll cycle and off-cycle process (if your balances have been updated).

Balances	Act/Proj	Begin Date	Previous Earnings	Begin Balance	Prior Month Posted	Adjustments	Usable Balance	Not Taken	Taken	Ending Balance
Sick	Projected	09/01/2016	10.00	277.550000	0.00	0.00	0.00	0	0	277.55
Vacation	Projected	09/01/2016	14.67	211.200000	0.00	0.00	0.00	0	0	211.20

- **Balances:** Identifies Sick and Vacation rows.
- **Act/ Proj:** Differentiates between past months, current month and future months.
  - Actual = past months.
  - Open = current month, not processed yet.
  - Closed = previous month has been sent to CU Time.
  - Projected = future months.
- **Begin Date:** Displays the month and year that you are currently viewing on your Calendar tab.
- **Previous Earnings:** Displays what accrued in the last monthly payroll run, or if status is Projected, what would normally be accrued from the previous month's work. If you work less than 100% of time, this will reflect in the amount earned. If you are unsure of your accrual rate, review these details on the Employee Services web page.
- **Begin Balance:** Displays the amount at the end of the previous month, not including the amount to be processed for that previous month. Exception time is processed one month after the fact.
- **Prior Month Posted:** Displays the number of hours to be processed in the next payroll process.
- **Adjustments:** Department Payroll contacts have the ability, if needed, to update balances in an off-cycle payroll process. If this occurs, you will see those hours listed in this column.
- **Usable Balance:** Displays the amount of the beginning balance minus Prior Month Posted and Adjustment hours.
- **Not Taken:** Displays sick and/or vacation hours that have been requested but not yet approved or processed.
- **Taken:** Displays **sick hours only** that are marked as Taken rather than being submitted and approved through a request to the supervisor.
- **Ending Balance:** Displays the total remaining balance after deducting Taken/Not Taken from the useable balance.

Loading Approved Time to CU Time (CU Department Timesheet Review)

Once timesheets are approved, they are ready to be loaded into CU Time for payroll processing. CU Department Timesheet Review is the tool used to load approved timesheets into CU Time.

Warning: Approved time is not automatically loaded into CU Time for processing. Approved timesheets **must** be loaded to CU Time prior to the payroll deadline using CU Department Timesheet Review.

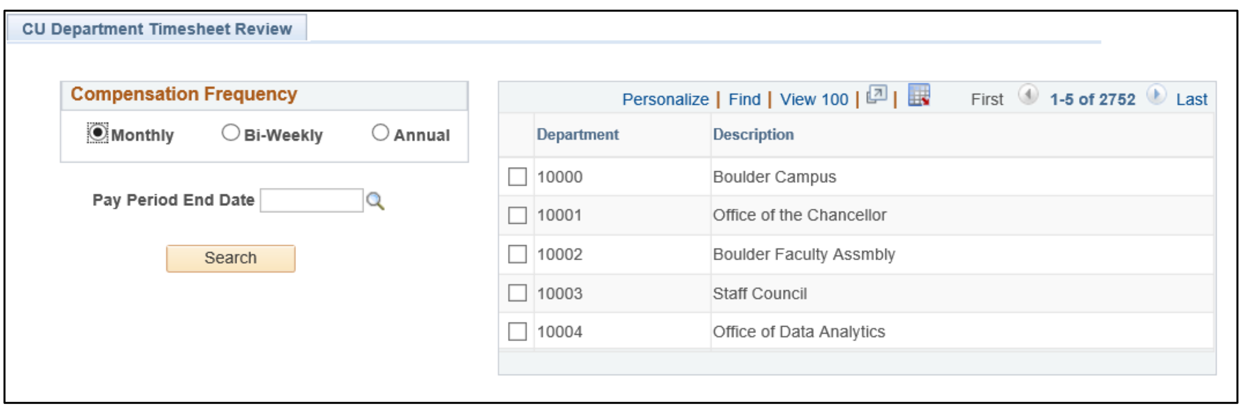
To review the status of your department's timesheets, you can run the My Leave Timesheets query from the WorkCenter. This report can be run for any time period and shows you the current status of all My Leave timesheets.

Selecting Approved Time to Load

Using CU Department Timesheet Review, you will need to select the approved time for loading to CU Time.

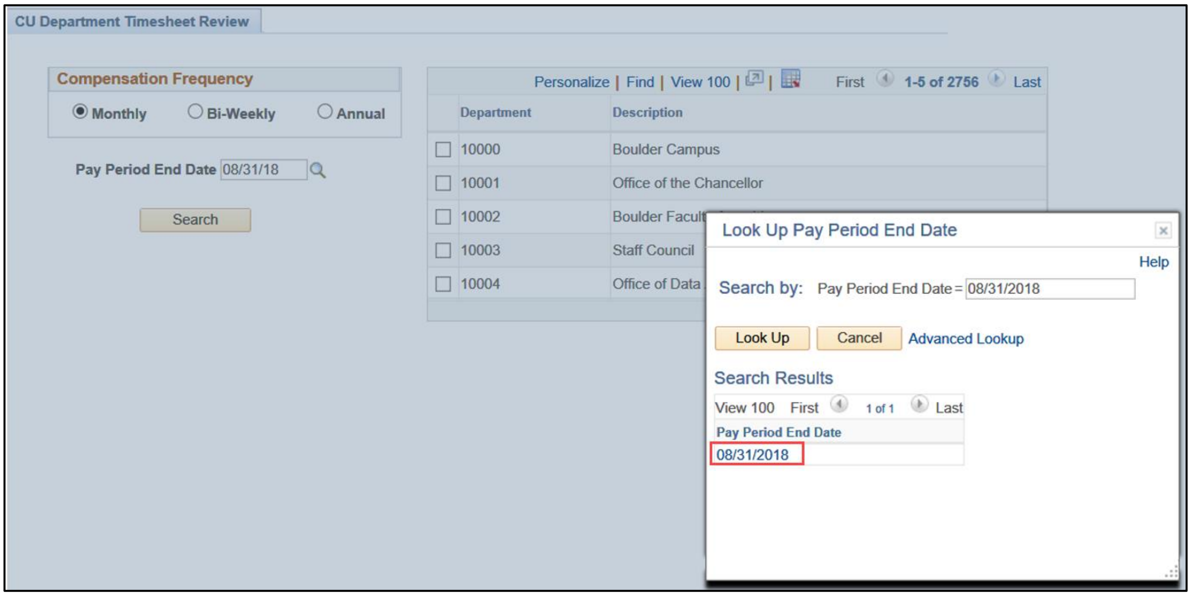
1. Open HCM and navigate to CU Department Timesheet Review.

   Navigation: **NavBar**> **Navigator**> **CU Time**> **CU Department Timesheet Review**.



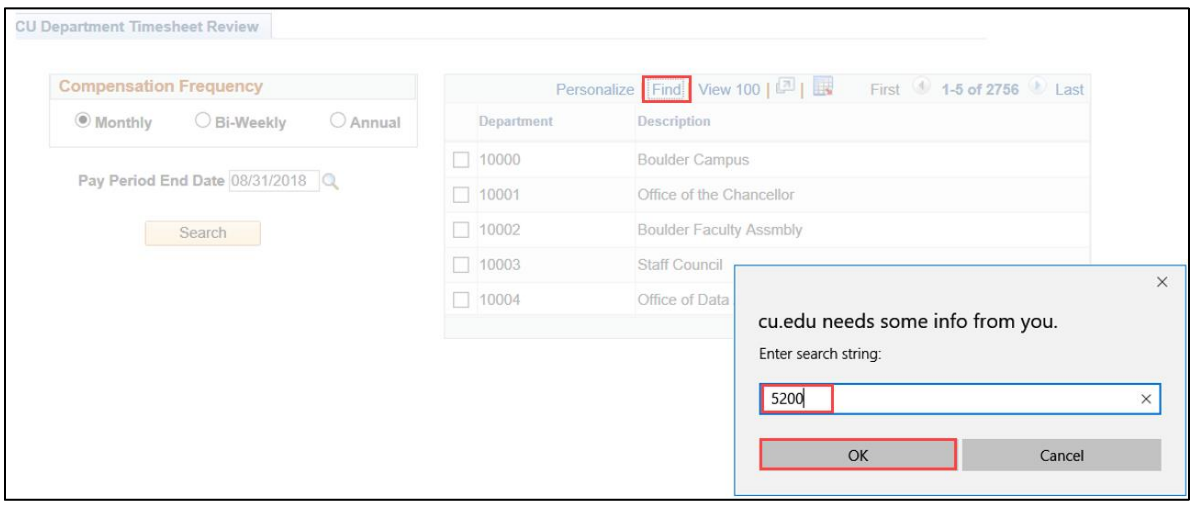
2. Select the **Compensation Frequency**, either **Monthly** or **Bi-Weekly**.
3. Enter the **Pay Period End Date** and select the lookup. The current open pay period is displayed.

4. Click the **Pay Period End Date**.

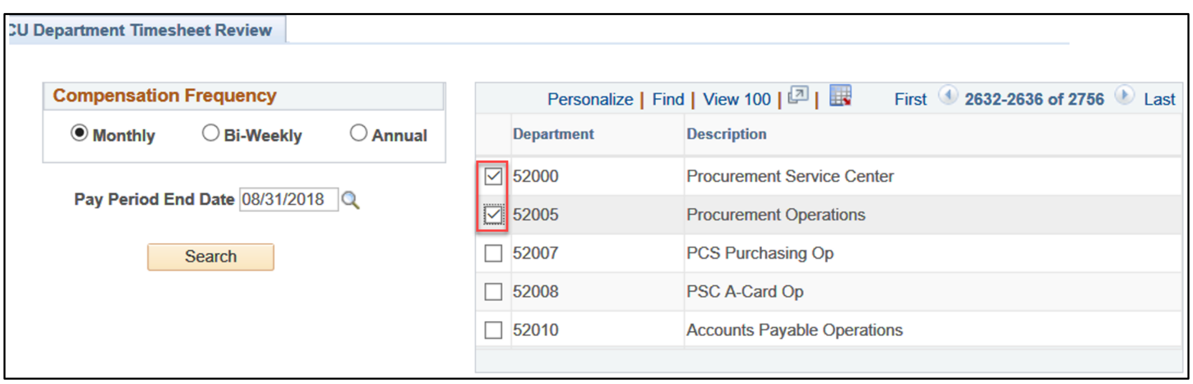


The system displays a listing of the department numbers to which you have access.

5. Optionally, if you want to search for a department, you can click **Find** at the top of the Department listing, type the department number, and click **OK**.

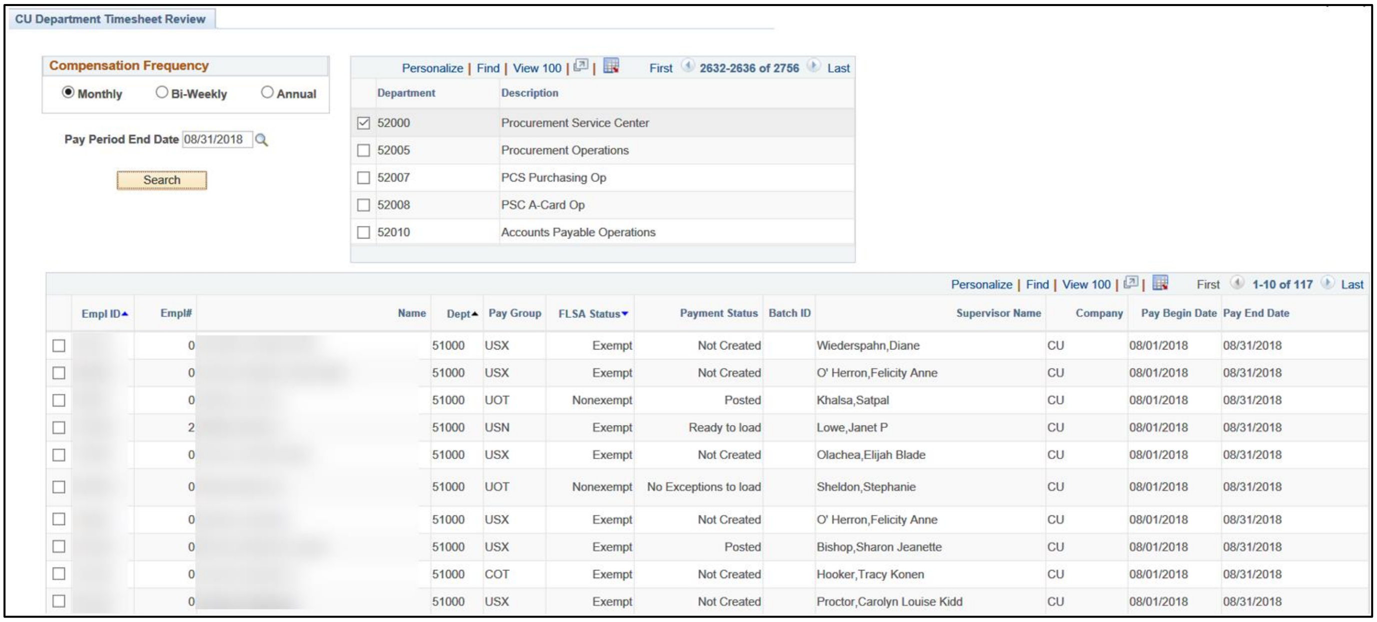


6. Select the department numbers you want to work with.

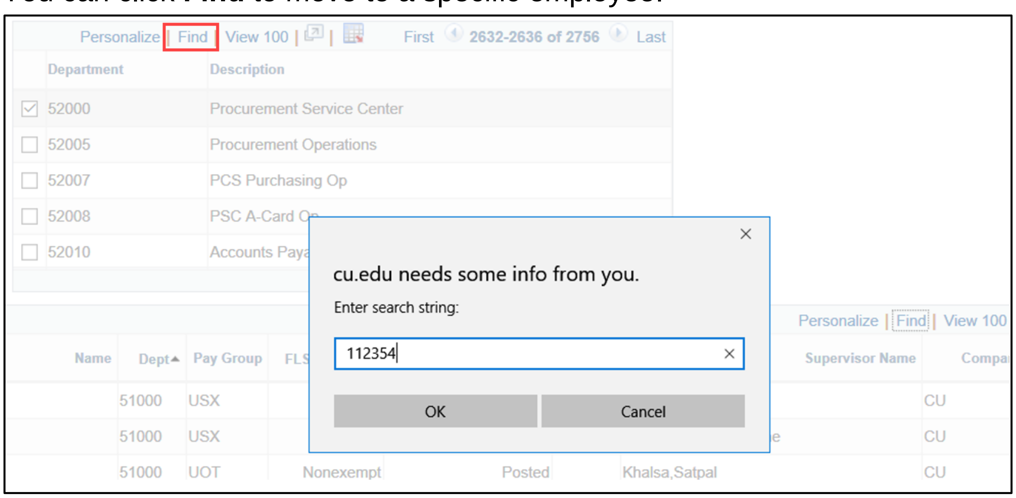


7. Click **Search**.

The system lists all active employees, exempt and non-exempt, as defined by your search criteria. The payment status for these two groups of employees may differ depending on what is being reported.

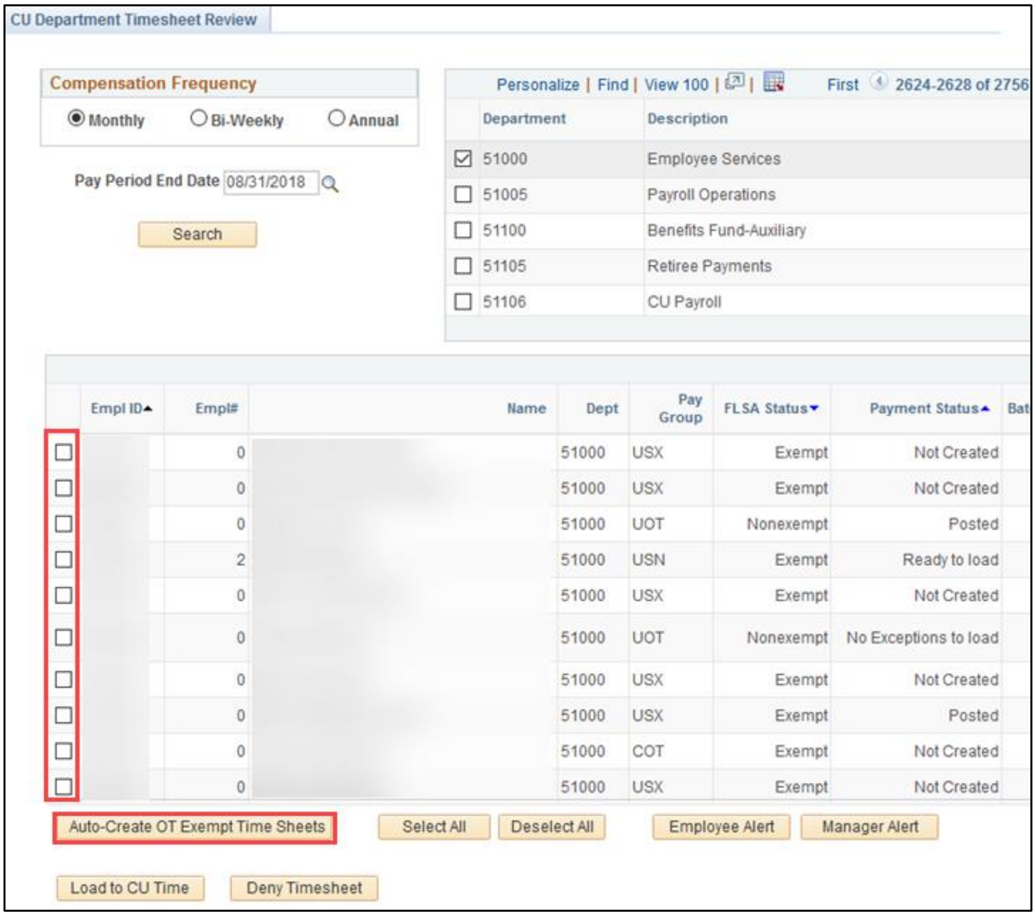


8. Review the listing of employee timesheets and their status.
   - You can click column headings to reorder the list by that column.
   - You can notify an employee or supervisor that an action is required, by selecting the employee checkbox and then clicking either Alert Employee or Alert Manager.
   - You can click **Find** to move to a specific employee.

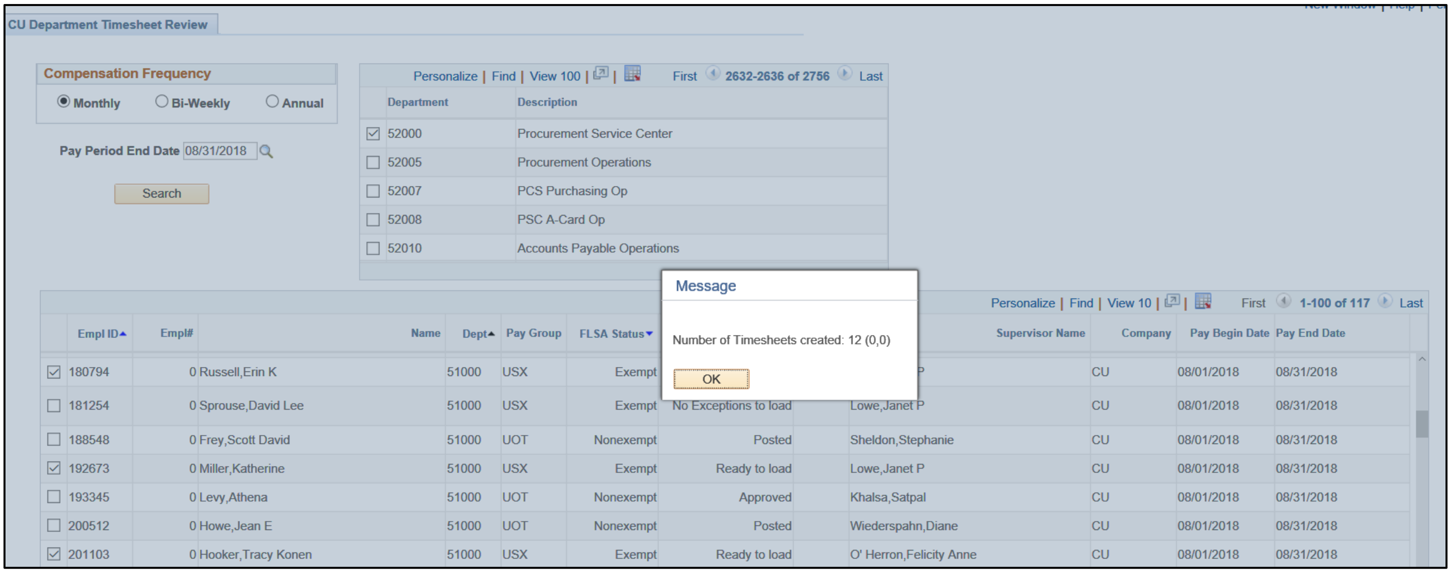


9. If you have exempt employees, you need to generate timesheets for them:
   a. Select the checkboxes of those exempt employees for whom you need to generate a timesheet.
   b. Click **Auto-Create OT Exempt Time Sheets**. Only approved leave hours will be loaded into CU Time for these employees.

   Note: As the department payroll administrator, you can use this Auto-Create function to retrieve exception time for exempt employees who do not have a submitted and approved timesheet. Auto-Create only works for exempt employees, and retrieves approved vacation and sick time from the My Leave Calendar.



When the process is complete, the system displays a message indicating how many timesheets were auto-created, and updates the payment status from Not Created to Ready to Load.



Loading Timesheets

Load all the timesheets that are listed as Ready to Load (exempt and non-exempt) to CU Time. If an employee timesheet displays as Posted, it has already been uploaded to CU Time.

1. Select the checkboxes of those employees whose timesheets are listed as Ready to Load.

   Note: You can click the Select All button to select all the checkboxes. Similarly, you can click Deselect All to clear the checkboxes.

2. Click **Load to CU Time**.

   Note: Clicking Load to CU Time loads approved timesheet information to CU Time. All timesheets must be loaded to CU Time every pay period unless they have no time to report.

When the process is complete, the system displays a message indicating the number of timesheets loaded, and updates the payment status to Posted or No Exceptions to load.

Allowing Changes to Posted Timesheets (Prior to Payroll)

If an employee needs to make a change to a timesheet that has posted to CU Time:

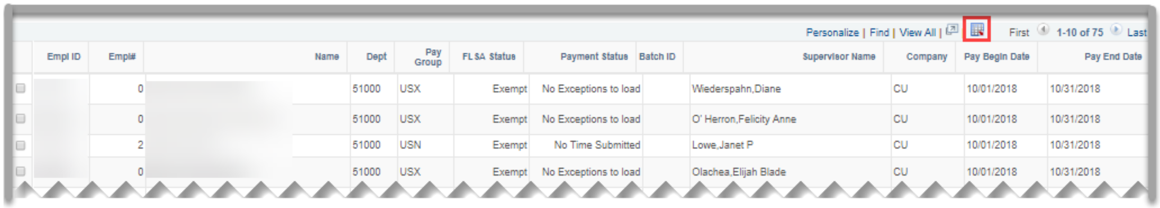
1. Select the check box of the employee
2. Click the **Deny Timesheet** button.

   Note: The Deny Timesheet button should only be selected when a timesheet is in Posted status, and payroll has not processed yet.

3. Allow the employee to cancel the approved timesheet, make changes and resubmit it for approval.
4. Once the timesheet is approved, load it to CU Time for processing.

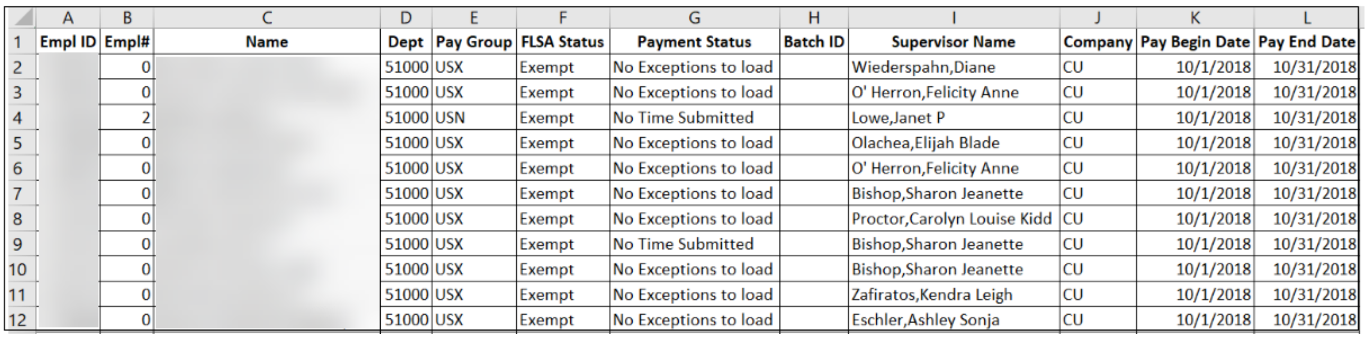
Exporting Timesheet Review Results

You can export the CU Department Timesheet Review results to an Excel file by selecting the **Download to Excel** icon .



Personalize | Find | View All | First 1-10 of 75 Last

Empl ID	Empl#	Name	Dept	Pay Group	FLSA Status	Payment Status	Batch ID	Supervisor Name	Company	Pay Begin Date	Pay End Date
[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Wiederspahn,Diane	CU	10/01/2018	10/31/2018
[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		O' Herron,Felicity Anne	CU	10/01/2018	10/31/2018
[illegible]	2	[illegible]	51000	USN	Exempt	No Time Submitted		Lowe,Janet P	CU	10/01/2018	10/31/2018
[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Olachea,Elijah Blade	CU	10/01/2018	10/31/2018



	A	B	C	D	E	F	G	H	I	J	K	L
1	Empl ID	Empl#	Name	Dept	Pay Group	FLSA Status	Payment Status	Batch ID	Supervisor Name	Company	Pay Begin Date	Pay End Date
2	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Wiederspahn,Diane	CU	10/1/2018	10/31/2018
3	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		O' Herron,Felicity Anne	CU	10/1/2018	10/31/2018
4	[illegible]	2	[illegible]	51000	USN	Exempt	No Time Submitted		Lowe,Janet P	CU	10/1/2018	10/31/2018
5	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Olachea,Elijah Blade	CU	10/1/2018	10/31/2018
6	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		O' Herron,Felicity Anne	CU	10/1/2018	10/31/2018
7	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Bishop,Sharon Jeanette	CU	10/1/2018	10/31/2018
8	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Proctor,Carolyn Louise Kidd	CU	10/1/2018	10/31/2018
9	[illegible]	0	[illegible]	51000	USX	Exempt	No Time Submitted		Bishop,Sharon Jeanette	CU	10/1/2018	10/31/2018
10	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Bishop,Sharon Jeanette	CU	10/1/2018	10/31/2018
11	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Zafiratos,Kendra Leigh	CU	10/1/2018	10/31/2018
12	[illegible]	0	[illegible]	51000	USX	Exempt	No Exceptions to load		Eschler,Ashley Sonja	CU	10/1/2018	10/31/2018

Understanding Payment Status Values

The following table describes payment statuses for both exempt and non-exempt employees. A checkmark appears in the column of the employee type for whom the status may apply.

Payment Status	Description	Exempt	Non-Exempt
Not Created	The employee has not submitted a timesheet, but there is time to report. PPLs can use the Auto Create function to generate timesheets for exempt employees. Only approved time will be loaded to CU Time.	✓	
No Exception Time to load	The employee does not have leave or overtime that needs to be reported.	✓	✓
Ready to Load	The supervisor has approved the employee's submitted timesheet.	✓	
Requested	The employee has submitted the timesheet and the supervisor needs to take action.	✓	✓
Approved	The supervisor has approved the employee's submitted timesheet, and it is ready to load to CU Time.		✓
Denied	The supervisor or department user has denied the employee's submitted timesheet. The employee should cancel the timesheet and submit a new one for approval.	✓	✓
Not Submitted	The employee has nothing to report. If you use the Auto Create function and this status does not change, it is because this exempt employee has nothing to report.	✓	
Posted	The timesheet has been loaded into CU Time.	✓	✓

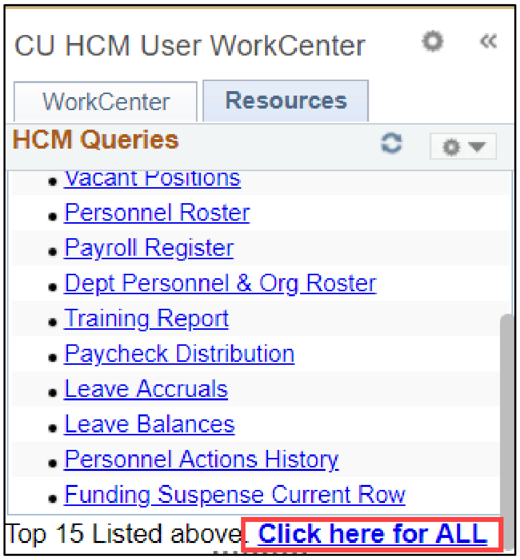
Auditing Leave and Time Entry—Running My Leave Reports in HCM

This section describes reports available from the HCM WorkCenter that can be helpful to manage My Leave and CU Time.

Reports for:	Report:	Query Name:
Auditing Leave and Time Entry	**Leave Accruals** – Returns a summary of current sick and vacation leave accruals by Empl ID or Dept ID.	CUES_HCM_LEAVE_ACCRUALS
	Time Entry – This report should be run to audit entries in CU Time that will be sent for payroll processing prior to the time entry deadline. The report lists all time entries by earnings dates. You can select a Status value that lets you select by timesheet status. If you select Approved from the Status list, the results would list items processing in the next payroll with different earnings dates.	CUES_HCM_REPORTED_TIME
	Essential Services Designees – Listing of all essential services employees.	CUES_HCM_ESSNTAL_SVCS
Auditing Time	**My Leave Calendar View** – This report can be run by a range of dates and returns information on the My Leave Calendar View for an employee or a department. This report can be used to audit time if an employee has missed submitting timesheets or changed the calendar after approvals.	CUES_HCM_MY_LEAVE_CALENDAR
Viewing Organization and Rosters	**Department Organization** – Lists all active positions, titles, incumbent information, name of the Reports To position and name of the Appointing Authority.	CUES_HCM_DEPT_ORG
	Dept Personnel & Org Roster – This report is run by a Job Code or department. The report includes all the information on the Department Organization report and adds Pay Status, FLSA, % Time, Pay Group and email address. This is a good report for viewing your department values for all required fields that My Leave needs from HCM to process correctly.	CUES_HCM_PERSONNEL_ORG
Viewing Timesheet Detail and Status	**My Leave Timesheet Detail** – Lists all in and out by day without a summary total.	CUES_HCM_MY_LEAVE_TMSHT_DTL
	My Leave Timesheets – Lists all timesheets for a department and the status. This report looks like the CU Dept Timesheet Review, but can be run after the pay period has closed as well as during the pay period.	CUES_HCM_MY_LEAVE_TMSHTS
	My Leave Timesheets Not Submitted – Use this report to search for timesheets of active employees who have not yet submitted for a specified pay period end date.	CUES_HCM_TIMESHT_NOT_SUBMITTED

To run a report:

1. From the HCM Community Users dashboard, select the **HCM WorkCenter** tile.
2. Click the **Resources** tab.
3. Scroll through the HCM Queries and select **Click here for ALL**.

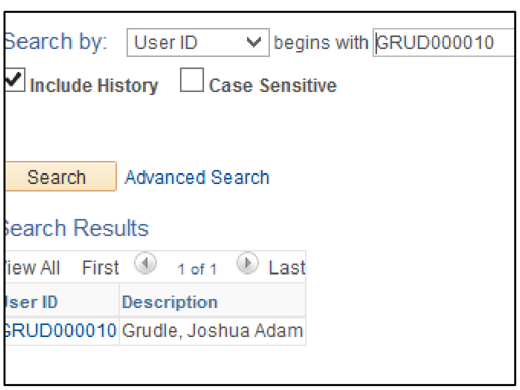


4. Click the query name, enter criteria (if applicable) and click **View Results**.

Assigning a Proxy and Reassigning Work

HCM Community members have access to set a proxy for a supervisor and reassign timesheet and leave requests submitted prior to the setting of the proxy.

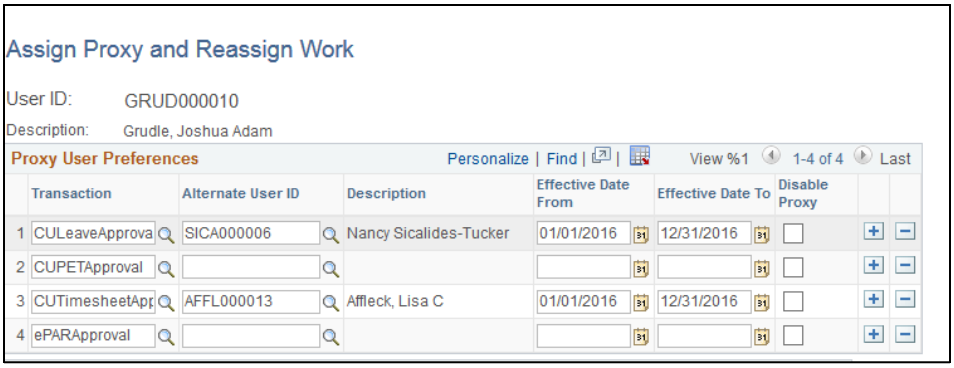
1. Navigation: **NavBar**> **Navigator**> **Smart Solutions**> **Smart Workflow**> **Workflow Admin**> **Assign Proxy and Reassign Work**.
2. Select the User ID of the supervisor for whom you are setting the proxy.



The system displays the page where you can set the proxy and reassign previously submitted requests. This page should only be used for Leave approval and Timesheet requests.

3. Select the User ID of the person who will be the proxy. You can have the same person for both timesheet and leave requests. Or have a different one for each. Refer to the *My Leave for Supervisors Step-by-Step Guide* for more information.

Note: HCM runs a security process four times a day that picks up the proxy settings; therefore, the person you saved as the proxy may not have immediate access through the portal.



Assign Proxy and Reassign Work

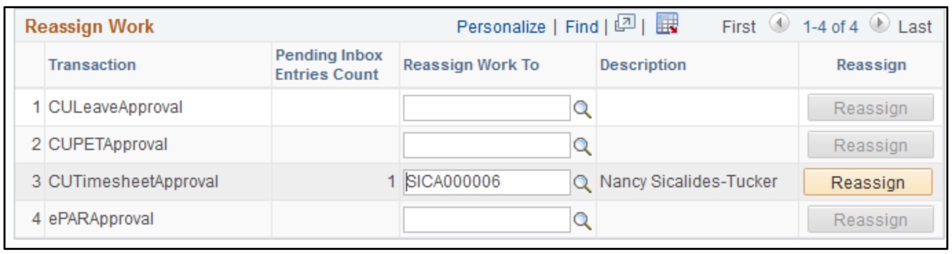
User ID: GRUD000010

Description: Grudle, Joshua Adam

Proxy User Preferences — Personalize | Find | View %1 — 1-4 of 4 — Last

	Transaction	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy
1	CULeaveApprova	SICA000006	Nancy Sicalides-Tucker	01/01/2016	12/31/2016	
2	CUPETApproval					
3	CUTimesheetApp	AFFL000013	Affleck, Lisa C	01/01/2016	12/31/2016	
4	ePARApproval					

To reassign requests previously submitted, enter the User ID to the pending inbox reflecting an entry and click **Reassign**. This will move all timesheets to the new supervisor.



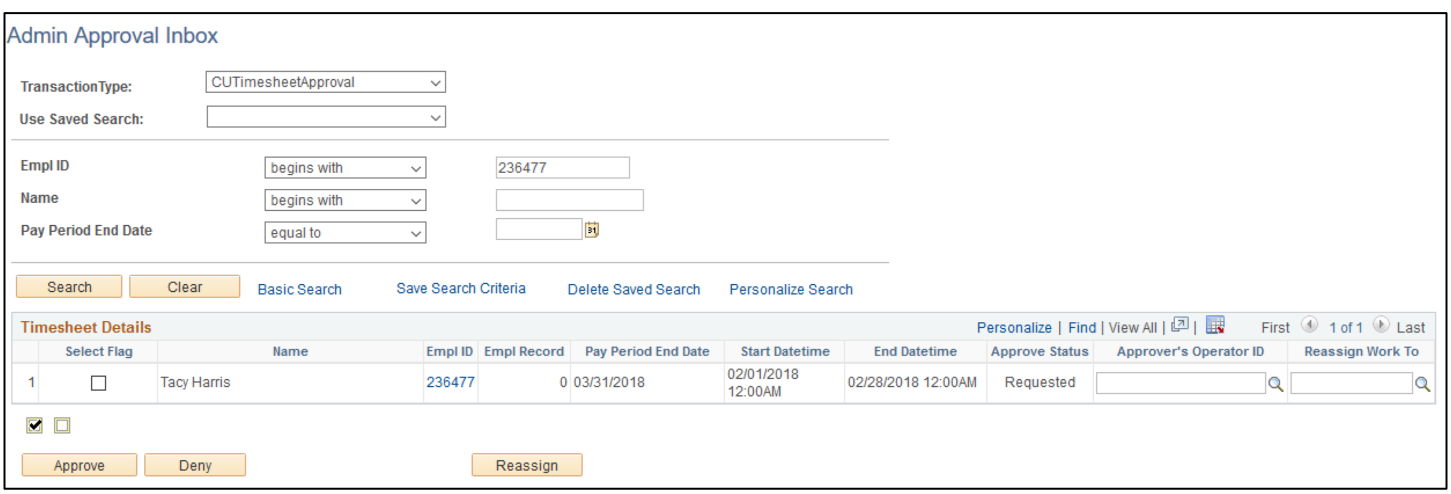
Reassign Work — Personalize | Find | First 1-4 of 4 Last

	Transaction	Pending Inbox Entries Count	Reassign Work To	Description	Reassign
1	CULeaveApproval				Reassign
2	CUPETApproval				Reassign
3	CUTimesheetApproval	1	SICA000006	Nancy Sicalides-Tucker	Reassign
4	ePARApproval				Reassign

Reassigning Approval on a Limited Basis (Admin Approval Inbox)

A department user may need to reassign timesheets on a one-by-one basis or for a pay period. The Admin Approval Inbox lets you select the transaction type, such as CU Timesheet Approval or CU Leave Approval. The next option would be to look for the employee by name or employee ID, then you can approve, deny, or reassign just this employee. You can use the lookup (magnifying glass) to search for the employee's approver operator ID.

Navigation: **NavBar**> **Navigator**> **Smart Solutions**> **Smart Workflow**> **Workflow Admin**> **Admin Approval Inbox**.



Admin Approval Inbox

TransactionType: CUTimesheetApproval

Use Saved Search:

Empl ID: begins with 236477

Name: begins with

Pay Period End Date: equal to

Search | Clear | Basic Search | Save Search Criteria | Delete Saved Search | Personalize Search

Timesheet Details — Personalize | Find | View All | First 1 of 1 Last

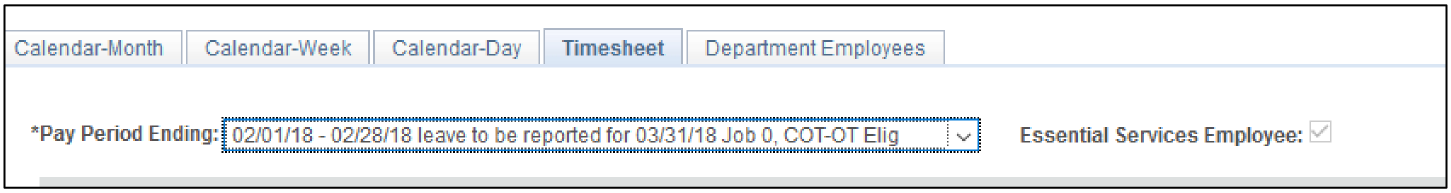
	Select Flag	Name	Empl ID	Empl Record	Pay Period End Date	Start Datetime	End Datetime	Approve Status	Approver's Operator ID	Reassign Work To
1		Tacy Harris	236477	0	03/31/2018	02/01/2018 12:00AM	02/28/2018 12:00AM	Requested		

Approve | Deny | Reassign

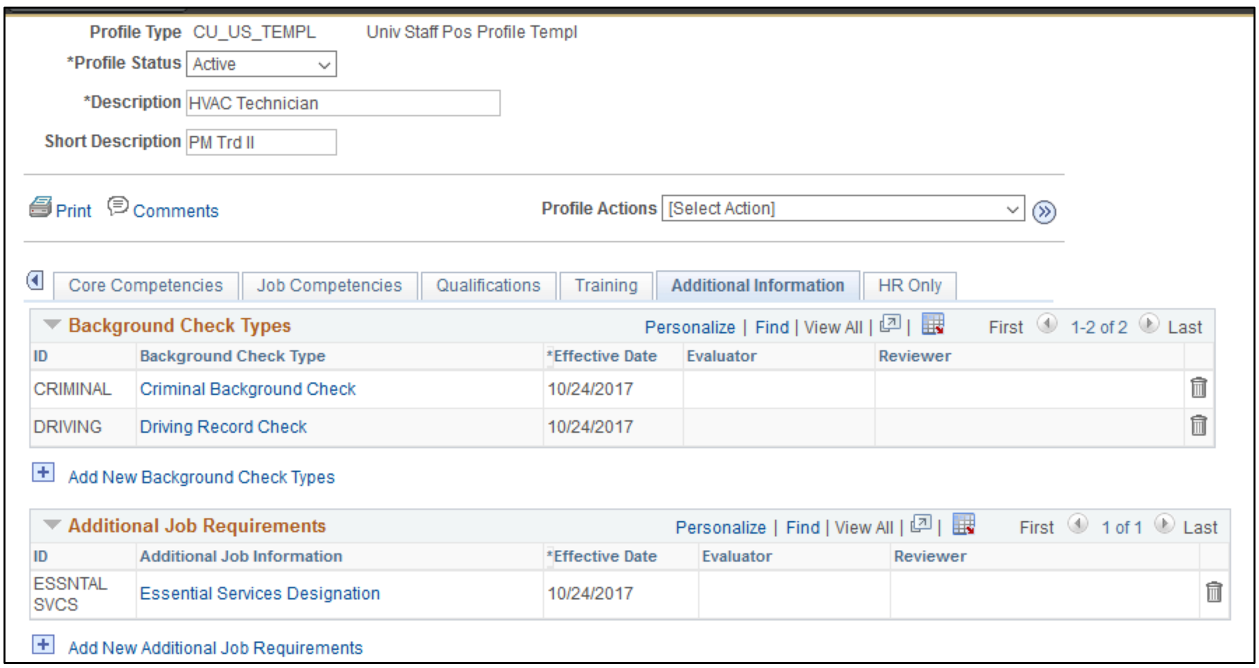
Essential Services Employees

Essential Services Employees are defined in the Non-Person Profile under Additional Duties. Vacation and sick hours add to the work hours in the week for these employees, and overtime is paid when the sum of all hours is over 40 for the standard week. The Essential Services check box will be selected in My Leave on the Timesheet view. In the CU HCM User WorkCenter, there is a query for all Essential Services Designees.

Timesheet View – My Leave



Non Person Profile – Essential Services Employee



Tips to Help HCM Community Members

Refer to *My Leave: Frequently Asked Questions* for more information and helpful tips.