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

Completing Annual Leave Certifications

This guide describes the process for employees and supervisors to complete annual leave certification as required by Regent Policy 11-E (http://www.cu.edu/regents/policy-11e-leave-policies-officers-exempt-professionals-and-faculty).

Certifying leave involves the following process:

1. Employees compare sick and vacation leave balances from My Leave, other time-tracking system, or their pay advice with the totals listed in My Info and Pay Annual Leave Certification on the portal.

2. Employees certify their leave balances in My Info and Pay on the portal through the Annual Leave Certification tile.

3. After employees submit requests for approvals, supervisors receive an email notification to approve or deny their requests. See Supervisors: Approving or Denying Annual Leave Certifications on page 4 for more information.

Getting Your Sick and Vacation Leave Balances for Comparison

You can check your leave balances in My Leave as described below. Or, if you use a different time-tracking system, you can use a pay advice, as described on the following page.

Checking Leave Balances in My Leave

From the employee portal:

1. Select the CU Resources tab. (System users skip this step.)

2. Click the My Leave tile.

3. Click << July.

4. Review the values in the Usable Balance column for both Sick and Vacation:

<table>
<thead>
<tr>
<th>Balances</th>
<th>Active</th>
<th>Begin Date</th>
<th>Remaining Curr. Bal</th>
<th>Remaining Prior Curr. Bal</th>
<th>Note</th>
<th>Active</th>
<th>Net Bal</th>
<th>Usable Balance</th>
<th>Not Taken</th>
<th>Taken</th>
<th>Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick</td>
<td>Active</td>
<td>07/01/2021</td>
<td>10,00</td>
<td>378,240,000</td>
<td></td>
<td>9.00</td>
<td>9.00</td>
<td>378.24</td>
<td>0</td>
<td>0</td>
<td>378.24</td>
</tr>
<tr>
<td>Vacation</td>
<td>Active</td>
<td>07/01/2021</td>
<td>11,87</td>
<td>262,670,000</td>
<td></td>
<td>89.00</td>
<td>9.00</td>
<td>182.87</td>
<td>0</td>
<td>0</td>
<td>182.87</td>
</tr>
</tbody>
</table>

The Usable Balance should match your Annual Leave Certification Vacation and Sick Leave Balance.
Checking Leave Balances Using Your Pay Advice

From the employee portal:

1. Select the **CU Resources** tab. (System users skip this step.)
2. Click the **CU Resources Home** dropdown menu, and select **My Info and Pay**.

![CU Resources Home](image)

3. Click the **Paychecks** tile.
4. Click your last July paycheck.
5. Scroll to the bottom of the pay advice to view the ending balances.

<table>
<thead>
<tr>
<th>YEAR TO DATE</th>
<th>PAID TIME OFF</th>
<th>SICK LEAVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Balance</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>+ Earned</td>
<td>811.3</td>
<td>553.1</td>
</tr>
<tr>
<td>+ Bought</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>- Taken</td>
<td>632.1</td>
<td>136.0</td>
</tr>
<tr>
<td>- Sold</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>+ Adjustments</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td><strong>End Balance</strong></td>
<td><strong>179.2</strong></td>
<td><strong>417.1</strong></td>
</tr>
</tbody>
</table>

The ending balance for your July paycheck includes vacation and sick leave accrued for July.

To balance to the leave certification, which is your balance as of 06/30, you will need to deduct the time accrued for July. If you are a full-time university-staff employee your Paid Time Off accrual is 14.67 and your monthly Sick Leave Accrual is 10.

**Note:** Vacation and sick leave accruals vary for classified employees based on length of service, and for university staff employees who do not work full time. If you are unsure of the amount you accrue every month, contact your HCM Department User or payroll liaison.
Comparing Leave Balances to Annual Leave Certification Values

Now compare the balances with those that appear in CU Annual Leave Certification.

From the employee portal:

1. Select the **CU Resources** tab. (System users skip this step.)
2. Click the **CU Resources Home** dropdown menu, and select **My Info and Pay**.
3. Click the Annual Leave Certification tile.

The CU Annual Leave Certification tab displays your Vacation and Sick leave balances for the fiscal year ending 06/30. The values from My Leave, or from a pay advice, should match the ending balances displayed on this tab.

- Values from My Leave should match to the Annual Leave Certification balances.
- Values from a pay advice are rounded and the Annual Leave Certification is an exact amount. The numbers might be slightly out of balance due to rounding differences.

Certifying Employee Leave Balances

To certify your leave balance:

1. If you agree with the balance, select **I agree with the Certification & OT eligibility statements**.
2. Click **Submit**. You will receive an email notification after you submit the approval and your supervisor approves or denies your request.

**Note:** If you disagree with the balance, contact your department’s payroll liaison for assistance.
Supervisors: Approving or Denying Annual Leave Certifications

After employees submit their certifications of leave, supervisors receive an email notification to approve or deny them.

Supervisors Using My Leave

My Leave Approvers have access to all the My Leave Calendars of the employees who report to them. Use the dropdown by your name in My Leave, to view your employees’ calendars and leave taken. If you have questions about leave that was recorded by your employees, you can move through the My Leave Calendars and Time Sheets to review the amounts recorded.

Supervisors Using other Time Keeping Systems and My Leave Access Leave Reports

If you have access to the CU HCM User WorkCenter, you can run the Leave – Fiscal Year End Review report for a list of all of your employees’ sick and vacation leave balances for the fiscal year. The Leave – Fiscal Year End Review report can be requested by supervisor ID, and can be requested from your department payroll administrator.
Approving or Denying Annual Leave Certifications

To approve or deny annual leave certifications:

1. From the Navigator in the portal, select CU Resources> Manager> Annual Leave Cert Approval. The balances reflected include both sick and vacation.

2. Select Approved or Denied for each request.

3. Click Submit.
Reports on leave certification and leave taken and recorded for the year may be provided to Approvers who need to approve leave certifications.

Campuses use several systems for time tracking. The following table lists reports available from the CU HCM User WorkCenter. These reports can be used to review and verify leave entered from My Leave and other time-tracking systems.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Query Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave – Fiscal Year End Review</td>
<td>Returns Sick and Vacation balances as of the last day of a specified fiscal year. For purposes of reviewing leave balances to be certified.</td>
<td>CUES_HCM_LEAVE_FYE_BALANCES</td>
</tr>
<tr>
<td>Leave Accruals</td>
<td>Returns a summary of current sick and vacation leave accruals by Empl ID or Dept ID. Information is pulled from the CU Leave Accrual Summary.</td>
<td>CUES_HCM_LEAVE_ACCRUAL_SUM</td>
</tr>
<tr>
<td>Leave Accrual Detail</td>
<td>Pulls information from the CU Leave Accrual Summary by Employee ID.</td>
<td>CUES_HCM_LEAVE_ACCRUAL_DTL</td>
</tr>
<tr>
<td>Leave Taken</td>
<td>Returns data on leave taken, based on payroll register information for leave processed through payroll from any time-keeping source. Can be limited by Dept ID, pay period begin and end dates, and/or Empl ID.</td>
<td>CUES_HCM_LEAVE_TAKEN</td>
</tr>
<tr>
<td>Leave Sweep Estimate</td>
<td>Returns estimated leave sweep amounts. Takes into account unprocessed My Leave entries and projected leave accruals through FYE. Due to size, scheduling this query (if running by business unit) is recommended.</td>
<td>CUES_HCM_LEAVE_SWEEP_EST</td>
</tr>
<tr>
<td>Leave Certification Status</td>
<td>Returns leave certification status. Can be limited by Fiscal Year, Node, Dept ID, Approver ID, Current Supervisor ID, or Employee ID.</td>
<td>CUES_HCM_LEAVE_CERT_STATUS</td>
</tr>
</tbody>
</table>