



# 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:

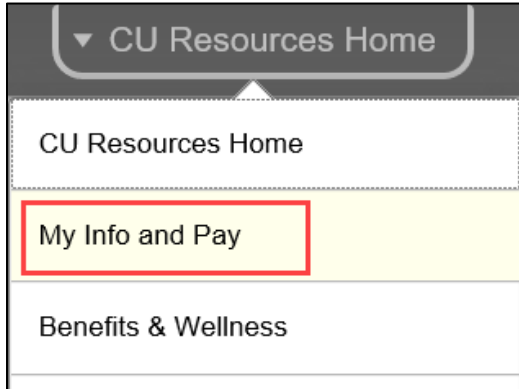
Balances	Act/Proj	Begin Date	Previous Earnings	Begin Balance	Prior Month Posted	Adjustments	Usable Balance	Not Taken	Taken	Ending Balance
Sick	Actual	07/01/2021	10.00	376.240000	0.00	0.00	376.24	0	0	376.24
Vacation	Actual	07/01/2021	14.97	262.070000	00.00	0.00	162.07	0	0	162.07

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**.



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.

<b>YEAR-TO-DATE</b>	<b>PAID TIME OFF</b>	<b>SICK LEAVE</b>
Start Balance	0.0	0.0
+ Earned	811.3	553.1
+ Bought	0.0	0.0
- Taken	632.1	136.0
- Sold	0.0	0.0
+ Adjustments	0.0	0.0
<b>End Balance</b>	<b>179.2</b>	<b>417.1</b>

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**.

**CU Annual Leave Certification**

Empl ID	Name		
Fiscal Year	2021	Annual Leave Certification from:	07/01/2020 To: 06/30/2021

Benefit Rcd #	Leave Plan	Beginning Balance	Ending Balance
0	University Faculty/Staff Vac	115.79	142.49
0	University Faculty/Staff Sick	310.86	390.86

CERTIFICATION: I certify the hours and minutes herein are a complete and accurate record of leave balances. All leave taken and/or overtime earned or taken as compensatory time was reported to and approved by my supervisor.

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.

The screenshot shows two instances of the 'My Leave' interface. The top instance shows a dropdown menu with a callout box containing the text: '1. Use the drop down arrow to see a list of direct reports. Click on the employee's name to see their calendar.' Below this, a table displays leave balances for an employee. The bottom instance shows the employee's calendar displayed, with a callout box containing the text: '2. The employee's calendar will display.' To the right, another callout box contains the text: '3. Use the July usable balance to compare to the leave certification.'

Balances	ActProj	Begin Date	Previous Earnings	Begin Balance	Prior Month Posted	Adjustments	Usable Balance	Not T
Sick	TimeSheet	08/01/2019	10.00	185.920000	0.00	0.00	185.92	
Vacation	TimeSheet	08/01/2019	14.67	208.070000	0.00	0.00	208.07	


Balances	ActProj	Begin Date	Previous Earnings	Begin Balance	Prior Month Posted	Adjustments	Usable Balance	Not T
			0.00	0.000000	0.00	0.00	0.00	0.00

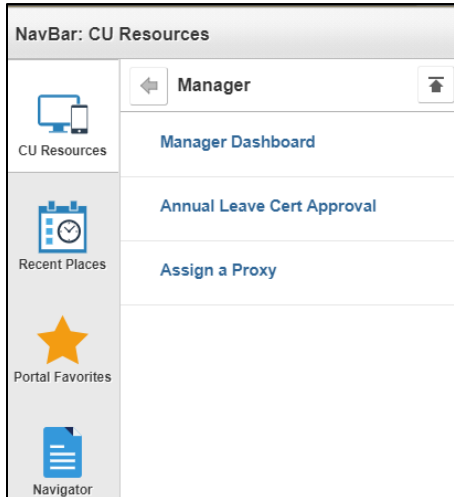
### Supervisors Using other Time Keeping Systems and My Leave Access Leave Reports

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.

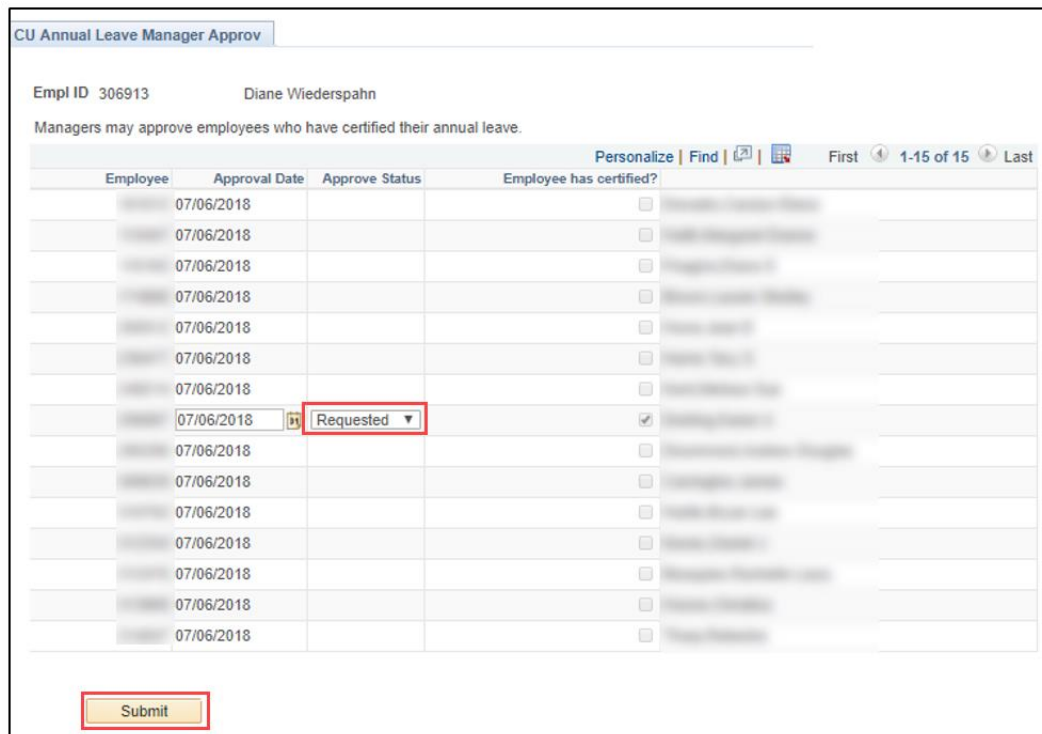
## Approving or Denying Annual Leave Certifications

To approve or deny annual leave certifications:

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



- Select **Approved** or **Denied** for each request.



- Click **Submit**.

## Department HR and Payroll Administrators

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.

Report Name	Description	Query Name
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.	CUES_HCM_LEAVE_FYE_BALANCES
Leave Accruals	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.	CUES_HCM_LEAVE_ACCRUAL_SUM
Leave Accrual Detail	Pulls information from the CU Leave Accrual Summary by Employee ID.	CUES_HCM_LEAVE_ACCRUAL_DTL
Leave Taken	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.	CUES_HCM_LEAVE_TAKEN
Leave Sweep Estimate	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.	CUES_HCM_LEAVE_SWEEP_EST
Leave Certification Status	Returns leave certification status. Can be limited by Fiscal Year, Node, Dept ID, Approver ID, Current Supervisor ID, or Employee Id.	CUES_HCM_LEAVE_CERT_STATUS