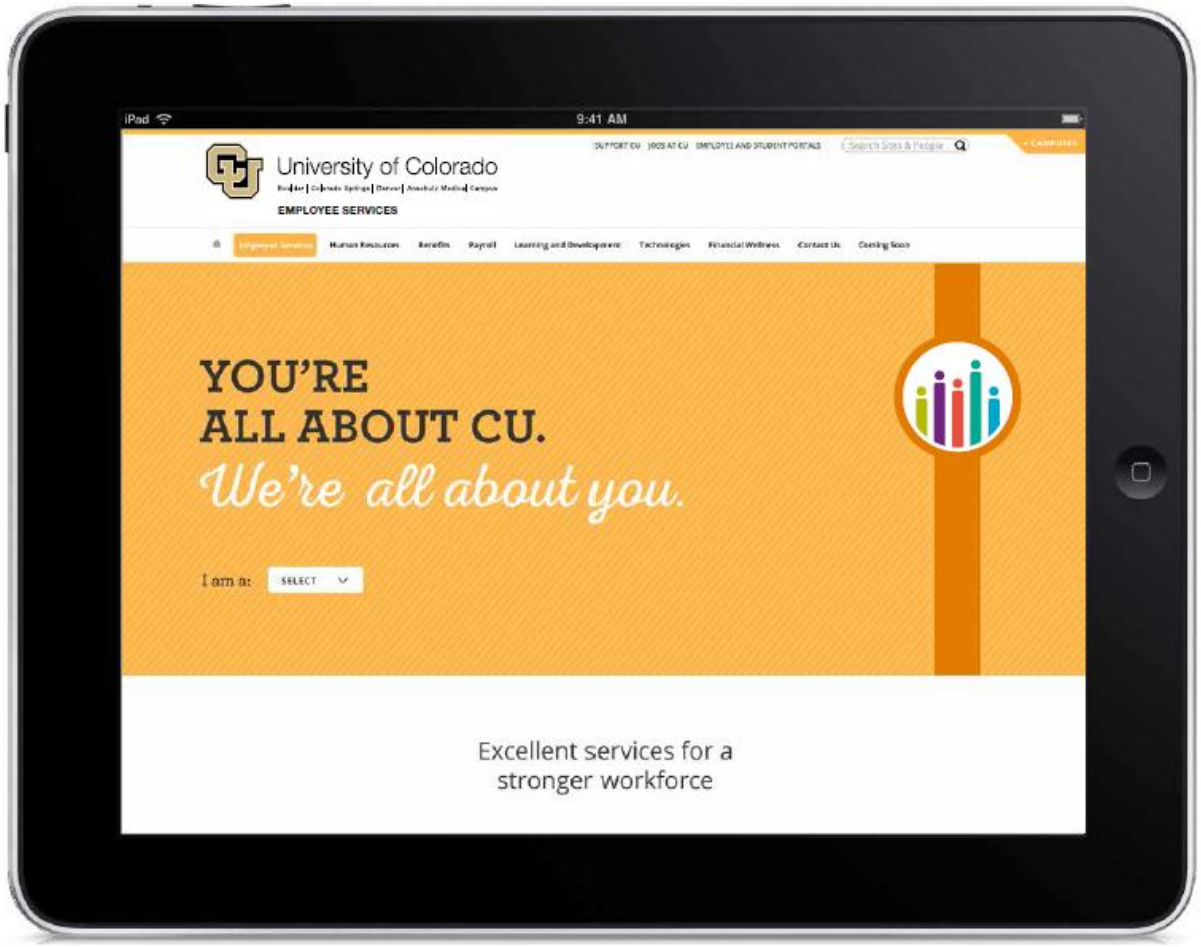
Business Partner Meetings

March 2015

Employee Services



Through their eyes

Icons will guide the way

AREA ICONS

Employee Services

1 | Benefits & Payroll

2 | Collaborative HR Services

3 | Financial Wellness

4 | Career Advancement & Training

5 | The CU Advantage

Employee Services

Cross-promotion between these five areas will be extensive.

Collaborative HR Services

Living up to our name.

- Human Resources
- Business Partners
- Talent Acquisition
- Technologies, such as HCM, ePerformance

Benefits & Payroll

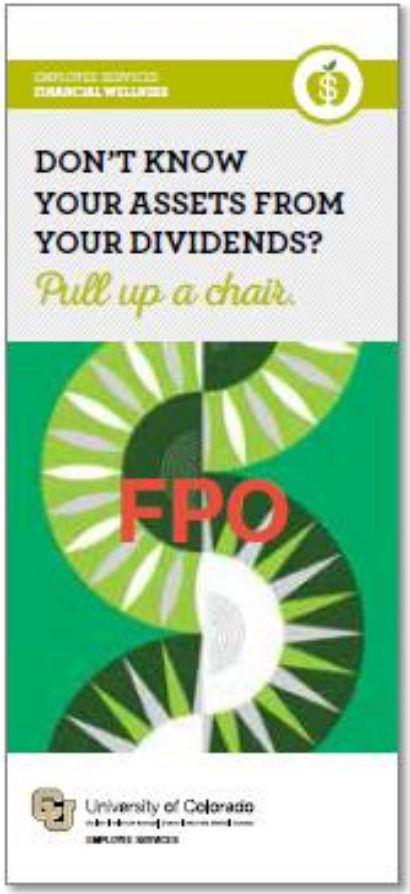
Making benefits more beneficial to you.

- Benefits
- Payroll
- Leave
- International Tax
- Technologies
- Tuition Benefit

Financial Wellness

Go from where you are to where you want to be.

- Financial Resources
- Online Assistance
- Personal Consultations
- Campus Workshops
- Growing lineup of services



Career Advancement & Learning

Knowledge is Power.

- Employee Learning and Development (ELP, LDP, online courses, Books24x7)
- Tuition Benefit
- CU Careers
- Technologies (such as ePerformance, Taleo)

The CU Advantage

Great extras for extra great people

-Focus on perks, benefits and discounts that only CU can offer.

-Items from ES and all CU campuses

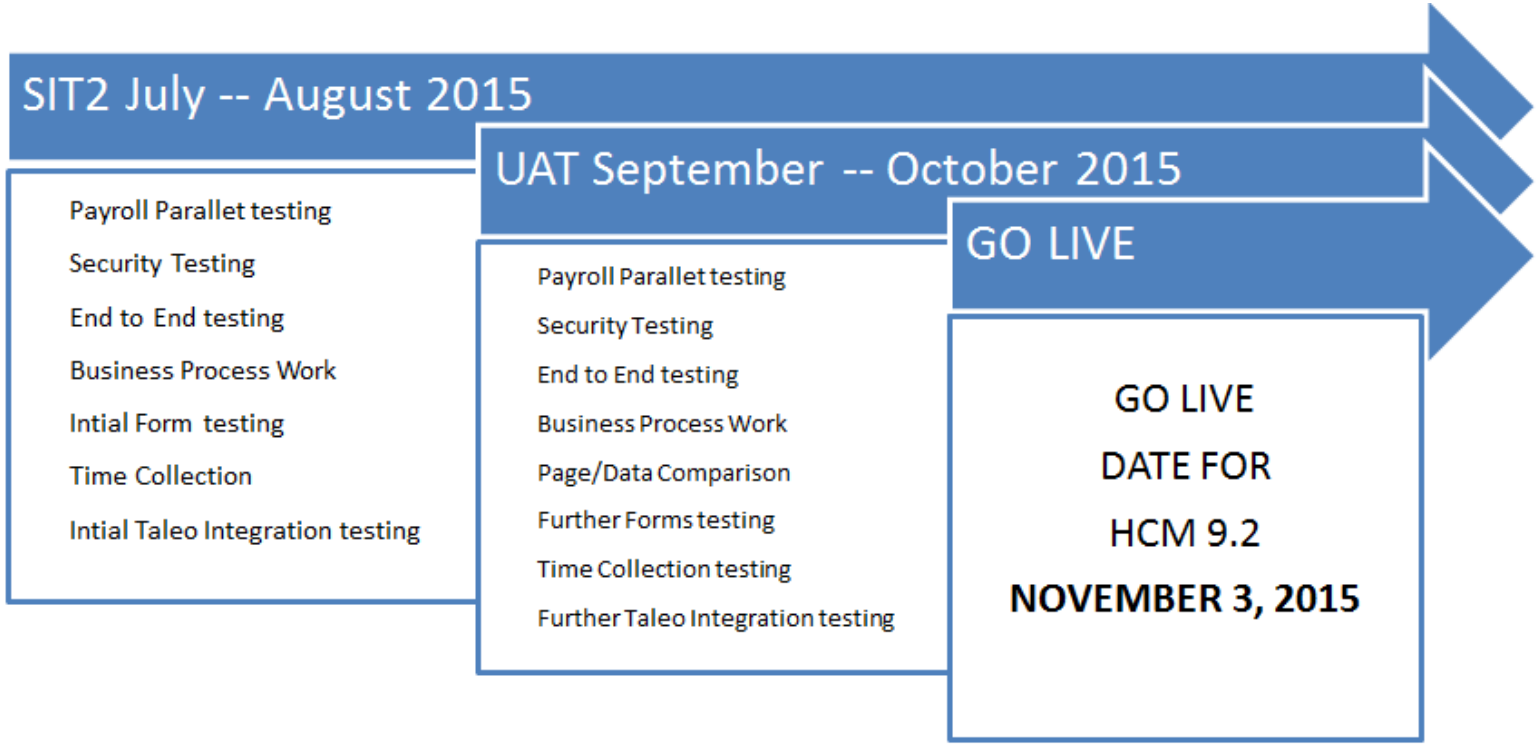
What does this mean to you?

- The brand represents who we are as Employee Services, what we embody and how we'll interact with employees and business partners like you.
- In the coming months, we'll be providing business partners with new tools, resources and communications materials that will help you improve your workday and help you answer questions from employees.

ELEVATE

HCM 9.2 Upgrade

Upcoming testing



Upcoming testing

- **System Integration Testing (ST2) – May – August 2015**
  - This phase includes testing of all migrated development and new configuration. Testing will be done in our SP2, TST & PAY environments

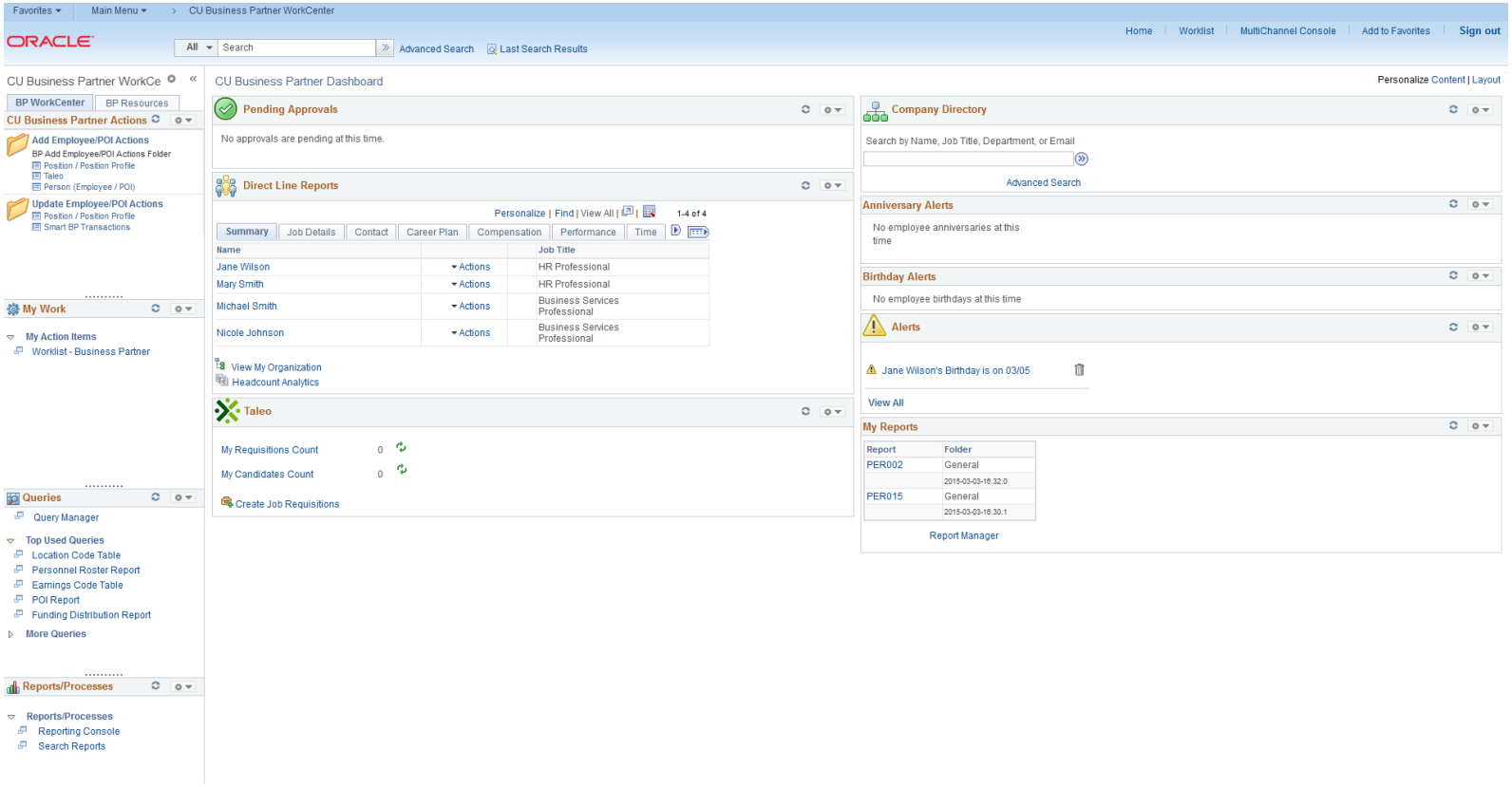
- **Model Testing to Campus (MTC) Campus Testing Involvement starts in July 2015**
  - This phase enables end-users an opportunity to log into the system, perform their typical tasks on the new system, verify their security access, validate their procedures and get comfortable with the new system.

Upcoming testing

- **User Acceptance testing (UAT) Campus Testing continues September – October 2015**
  - During testing phase, the processes will be tested in the system for acceptability. It validates the end-to-end business process flows. This testing will be executed by campus power users, either by site testing or demos for our campuses. This confirms whether our HCM 9.2 PeopleSoft system upgrade meets the requirements and business processes for University of Colorado.

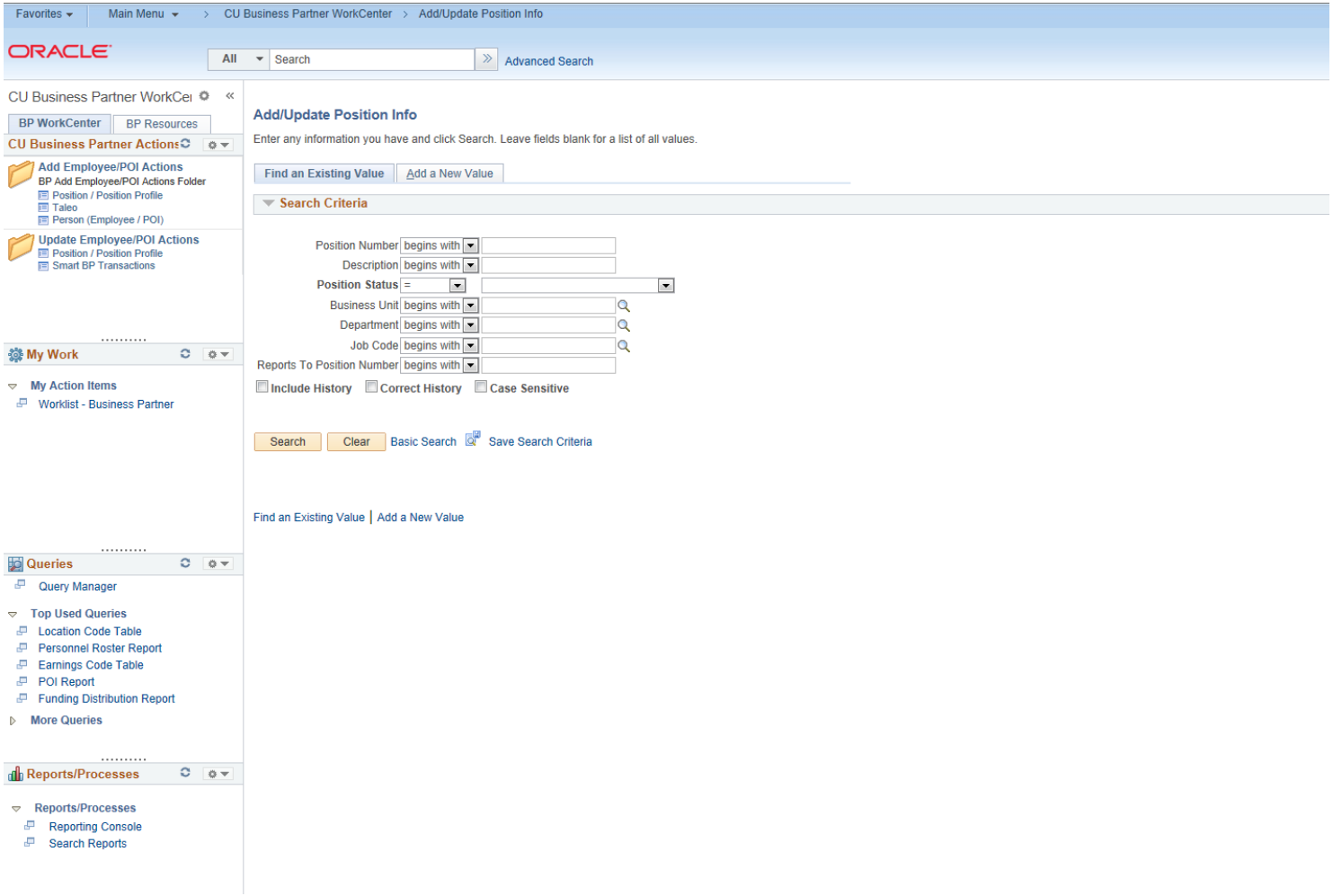
WorkCenter Overview

CU Business Partner WorkCenter



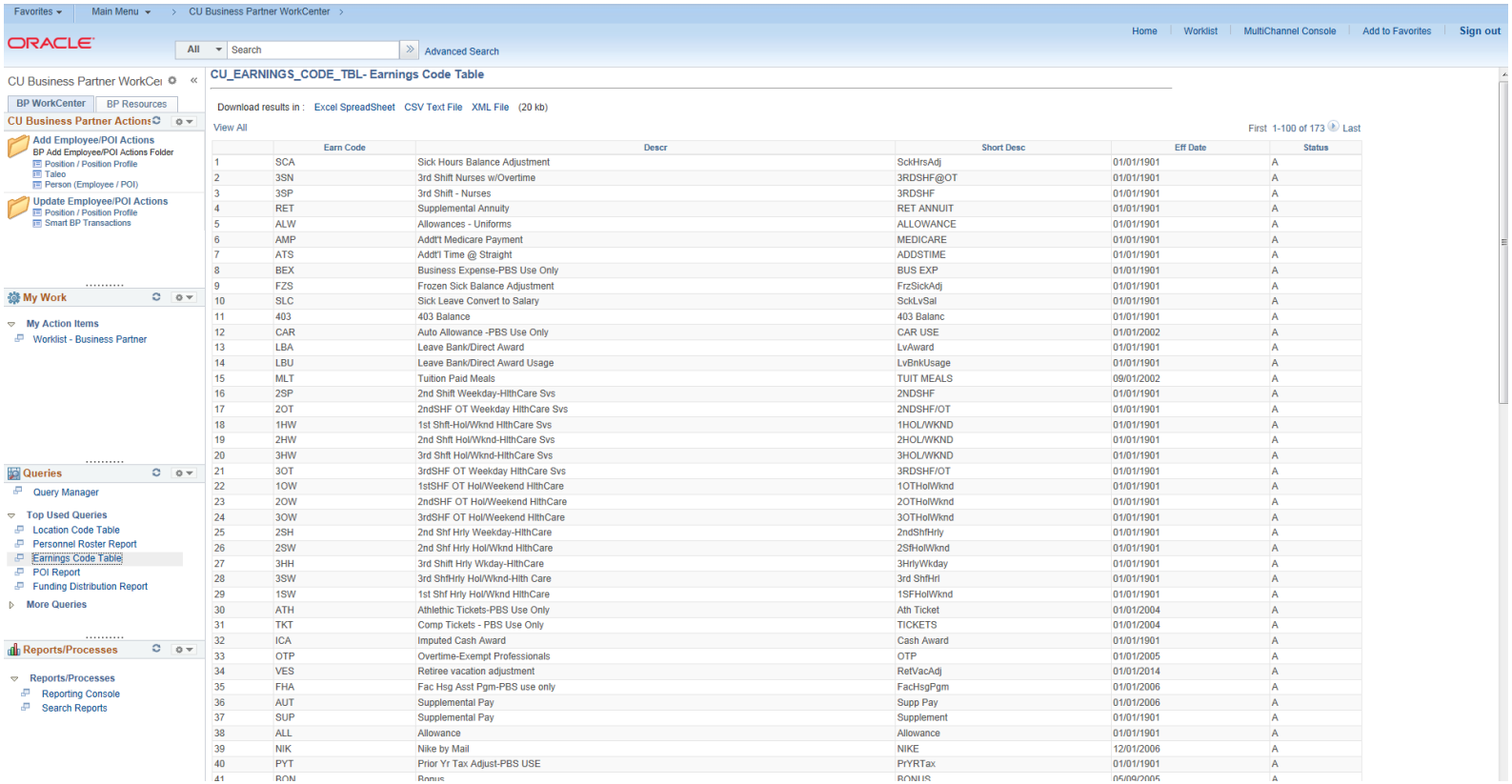
Navigation Bundles and Page Access from within WorkCenter

Worklist Access



PS Query – Frequently used queries

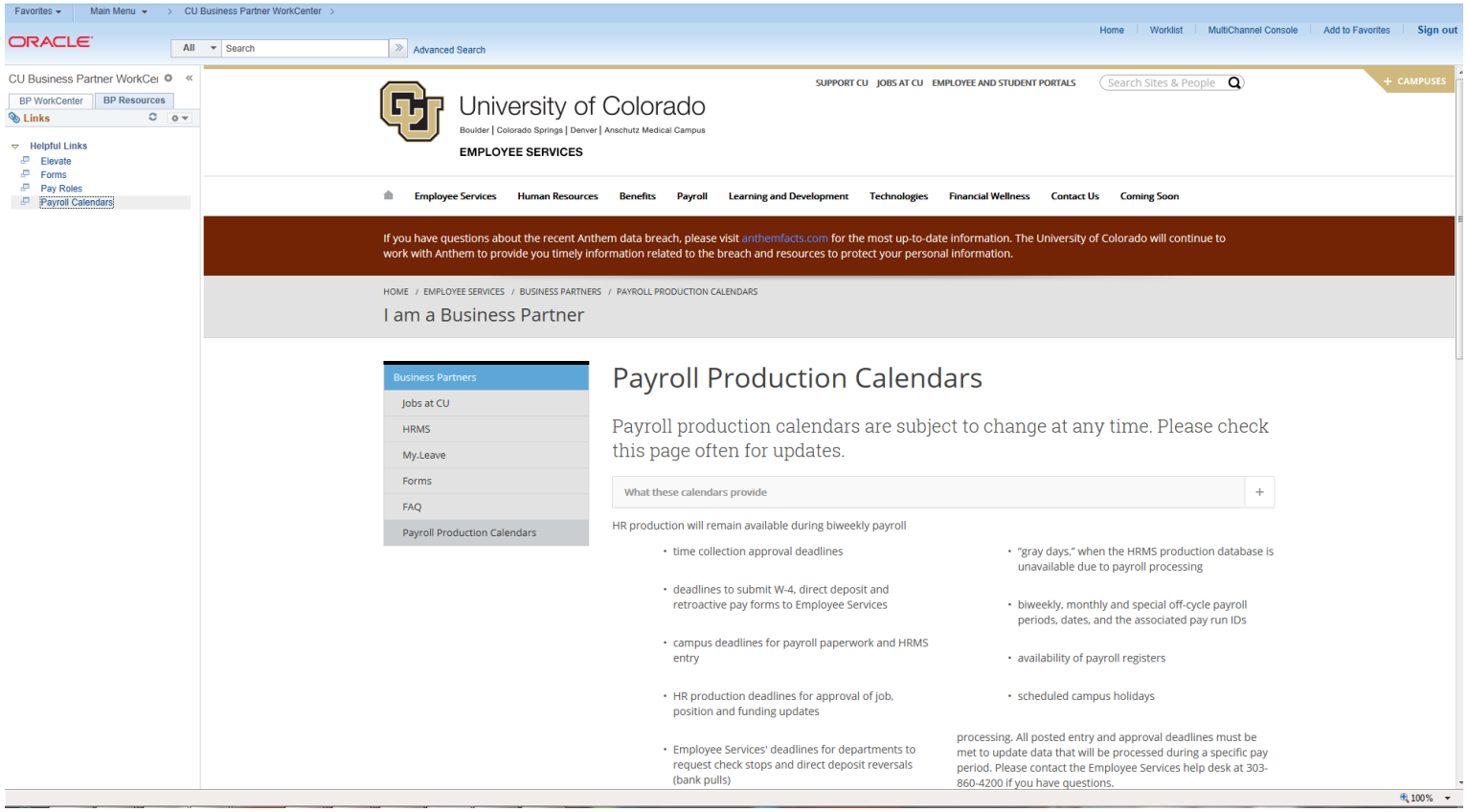
Results display in WorkCenter



	Earn Code	Descr	Short Desc	Eff Date	Status
1	SCA	Sick Hours Balance Adjustment	SckHrsAdj	01/01/1901	A
2	3SN	3rd Shift Nurses w/Overtime	3RDSHF@OT	01/01/1901	A
3	3SP	3rd Shift - Nurses	3RDSHF	01/01/1901	A
4	RET	Supplemental Annuity	RET ANNUIT	01/01/1901	A
5	ALW	Allowances - Uniforms	ALLOWANCE	01/01/1901	A
6	AMP	Addt'l Medicare Payment	MEDICARE	01/01/1901	A
7	ATS	Addt'l Time @ Straight	ADDSTIME	01/01/1901	A
8	BEX	Business Expense-PBS Use Only	BUS EXP	01/01/1901	A
9	FZS	Frozen Sick Balance Adjustment	FrzSickAdj	01/01/1901	A
10	SLC	Sick Leave Convert to Salary	SckLvSal	01/01/1901	A
11	403	403 Balance	403 Balanc	01/01/1901	A
12	CAR	Auto Allowance -PBS Use Only	CAR USE	01/01/2002	A
13	LBA	Leave Bank/Direct Award	LvAward	01/01/1901	A
14	LBU	Leave Bank/Direct Award Usage	LvBnkUsage	01/01/1901	A
15	MLT	Tuition Paid Meals	TUIT MEALS	09/01/2002	A
16	2SP	2nd Shift Weekday-HlthCare Svs	2NDSHF	01/01/1901	A
17	2OT	2ndSHF OT Weekday HlthCare Svs	2NDSHF/OT	01/01/1901	A
18	1HW	1st Shft-Hol/Wknd HlthCare Svs	1HOL/WKND	01/01/1901	A
19	2HW	2nd Shft Hol/Wknd-HlthCare Svs	2HOL/WKND	01/01/1901	A
20	3HW	3rd Shft Hol/Wknd-HlthCare Svs	3HOL/WKND	01/01/1901	A
21	3OT	3rdSHF OT Weekday HlthCare Svs	3RDSHF/OT	01/01/1901	A
22	1OW	1stSHF OT Hol/Weekend HlthCare	1OTHolWknd	01/01/1901	A
23	2OW	2ndSHF OT Hol/Weekend HlthCare	2OTHolWknd	01/01/1901	A
24	3OW	3rdSHF OT Hol/Weekend HlthCare	3OTHolWknd	01/01/1901	A
25	2SH	2nd Shf Hrly Weekday-HlthCare	2ndShfHrly	01/01/1901	A
26	2SW	2nd Shf Hrly Hol/Wknd HlthCare	2SfHolWknd	01/01/1901	A
27	3HH	3rd Shift Hrly Wkday-HlthCare	3HrlyWkday	01/01/1901	A
28	3SW	3rd ShftHrly Hol/Wknd-Hlth Care	3rd ShftHrl	01/01/1901	A
29	1SW	1st Shf Hrly Hol/Wknd HlthCare	1SFHolWknd	01/01/1901	A
30	ATH	Athlethic Tickets-PBS Use Only	Ath Ticket	01/01/2004	A
31	TKT	Comp Tickets - PBS Use Only	TICKETS	01/01/2004	A
32	ICA	Imputed Cash Award	Cash Award	01/01/1901	A
33	OTP	Overtime-Exempt Professionals	OTP	01/01/2005	A
34	VES	Retiree vacation adjustment	RetVacAdj	01/01/2014	A
35	FHA	Fac Hsg Asst Pgm-PBS use only	FacHsgPgm	01/01/2006	A
36	AUT	Supplemental Pay	Supp Pay	01/01/2006	A
37	SUP	Supplemental Pay	Supplement	01/01/1901	A
38	ALL	Allowance	Allowance	01/01/1901	A
39	NIK	Nike by Mail	NIKE	12/01/2006	A
40	PYT	Prior Yr Tax Adjust-PBS USE	PrYRTax	01/01/1901	A
41	BON	Bonus	BONUS	05/09/2005	A

BP Resources Tab

Provide helpful links that open within WorkCenter



ePerformance Overview

Agenda

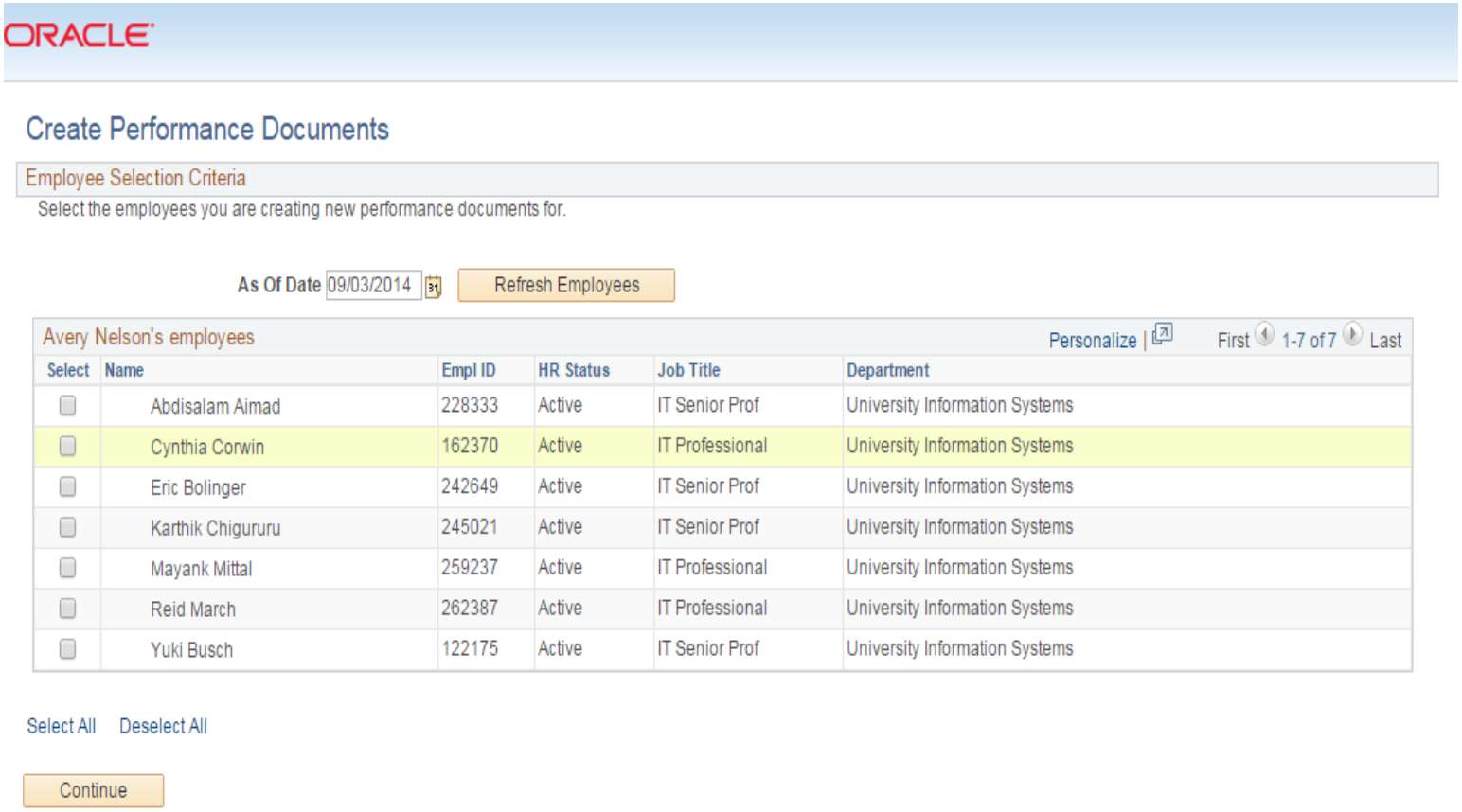
- Overview
  - Templates Built for University Staff, Classified Staff and Faculty pulling from Position Profile
  - Manager Self-Service
  - Work Centers
  - Approval workflow built-in
  - Rating History
- Entering Performance Ratings for Plan Year 2015
- Creating the Performance Plan
- Checkpoints
- Self Evaluation
- Peer Review/360^{o} Reviews
- Annual Evaluation

ePerformance Timeline

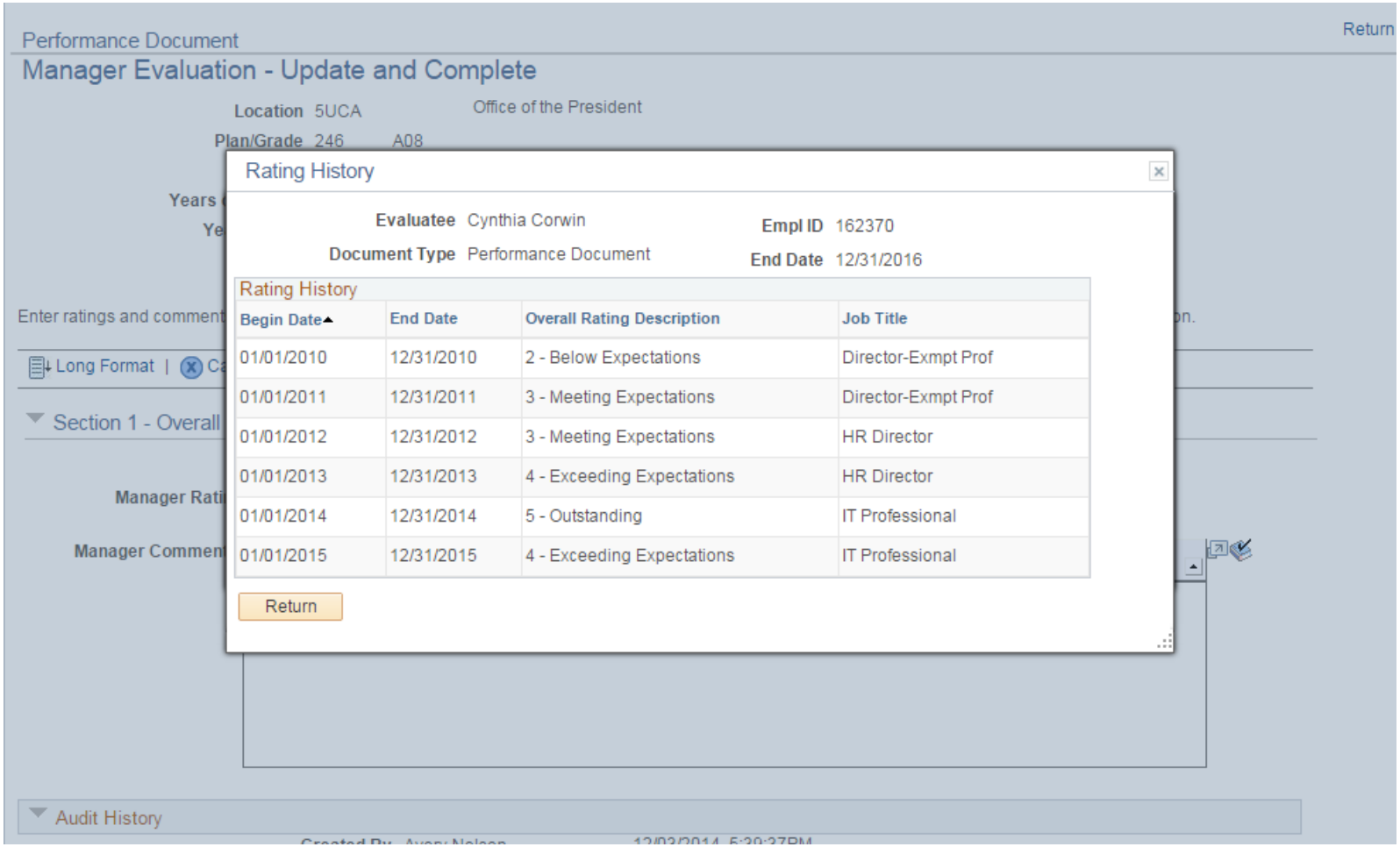
- Go Live November 1, 2015
  - Entering annual performance ratings for 2015 plan year
  - Review position profiles – building block for 2016 plans
- January 1, 2016
  - System auto generated performance plans (going forward, managers to clone existing or for new employees)
- 2016 Mid-Year Checkpoint - flexible
- Optional Self-Evaluation, Peer/360^{o} Reviews
- March 1, 2017 deadline for University Staff Annual Evaluation
- May 1, 2017 deadline for Classified Staff Annual Evaluation

Manager Self-Service

Manager Self Service –
Performance Management: displays direct reports

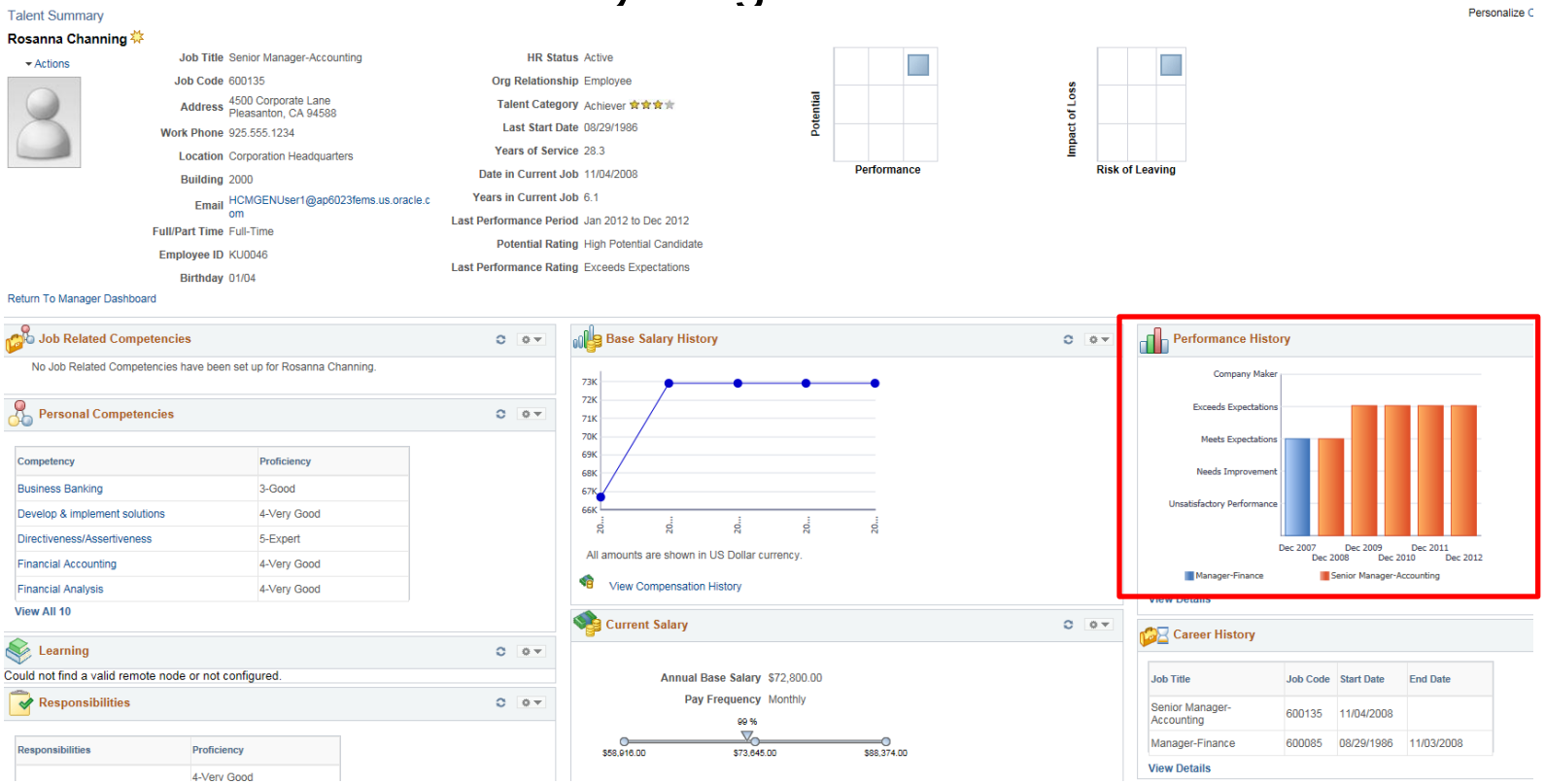


Review of Historical Ratings

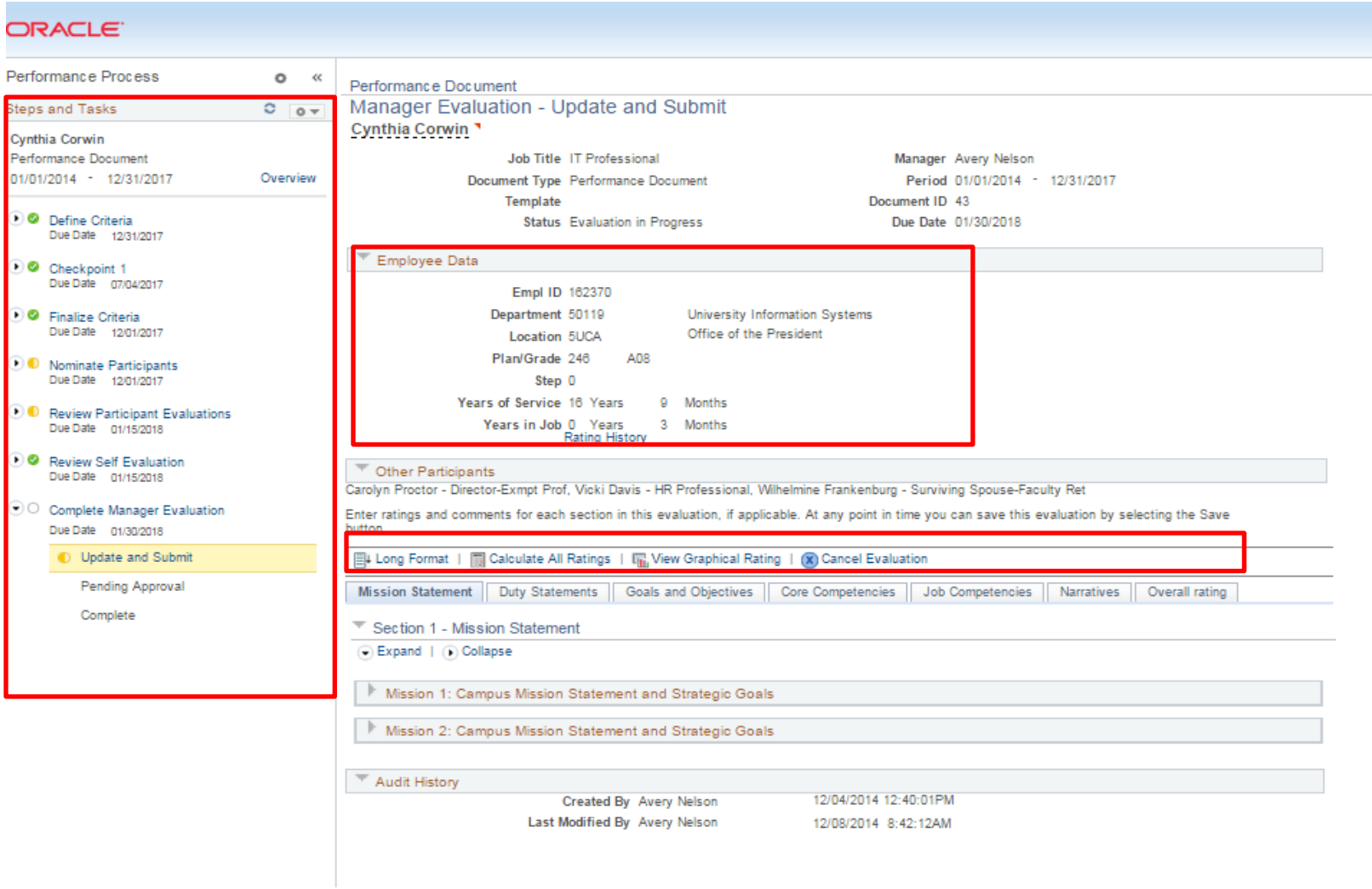


Employee Talent Summary

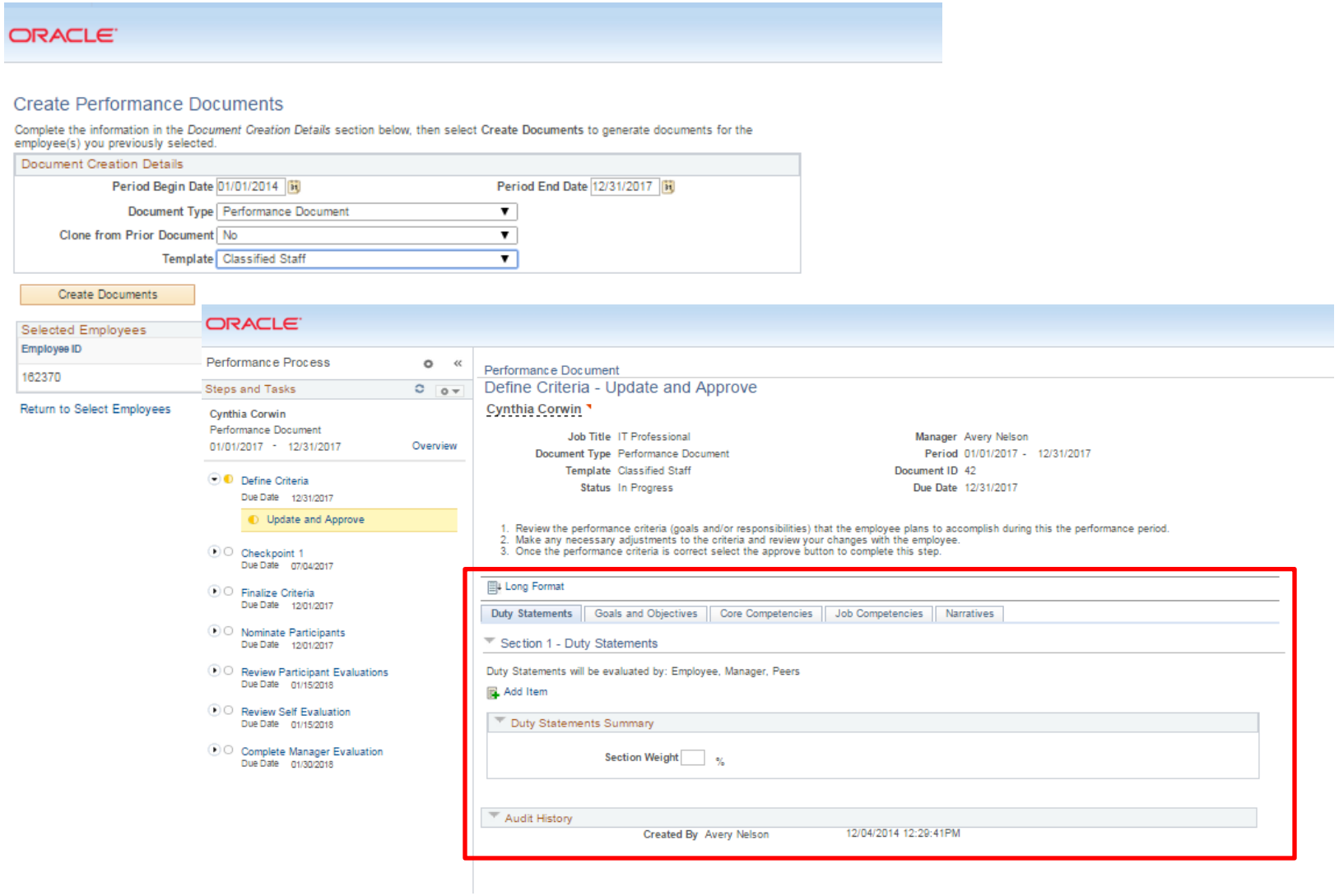
In the Talent Summary Page:



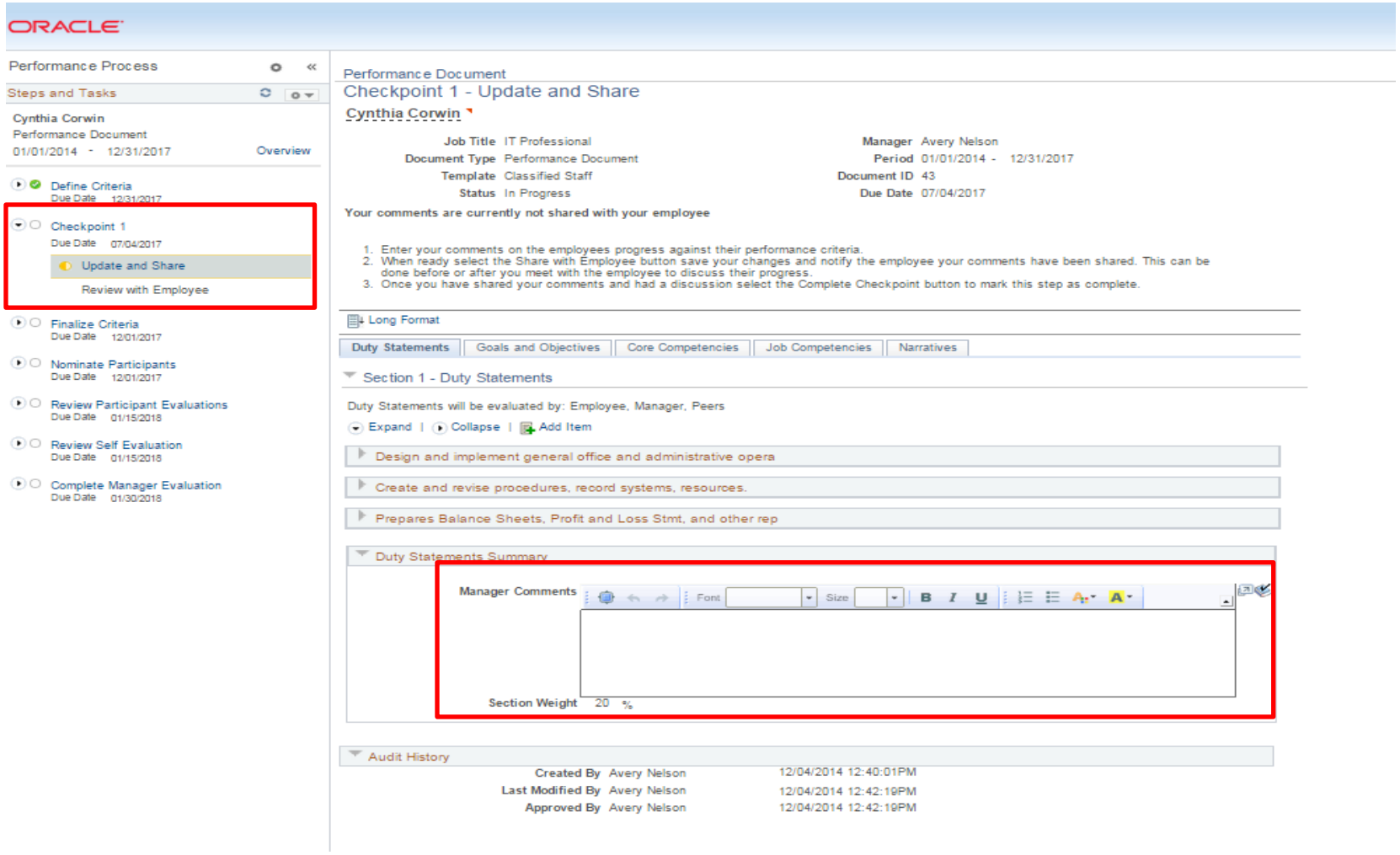
Performance Work Centers



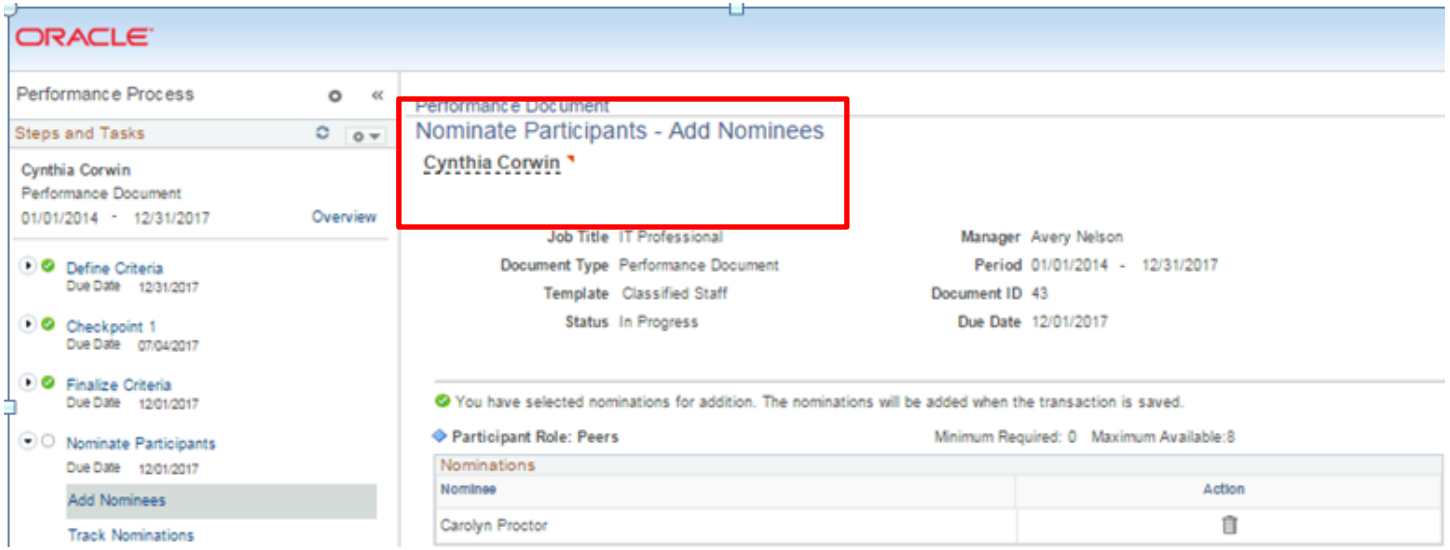
Create Performance Plan – Define Criteria

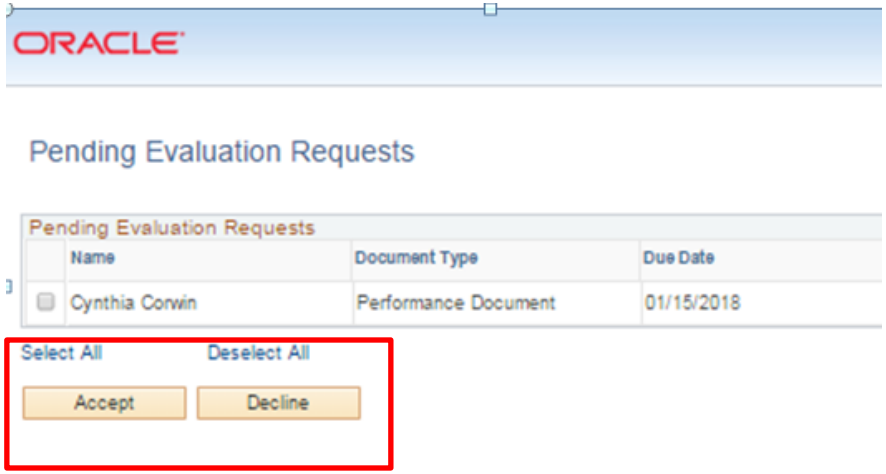


Optional Checkpoints

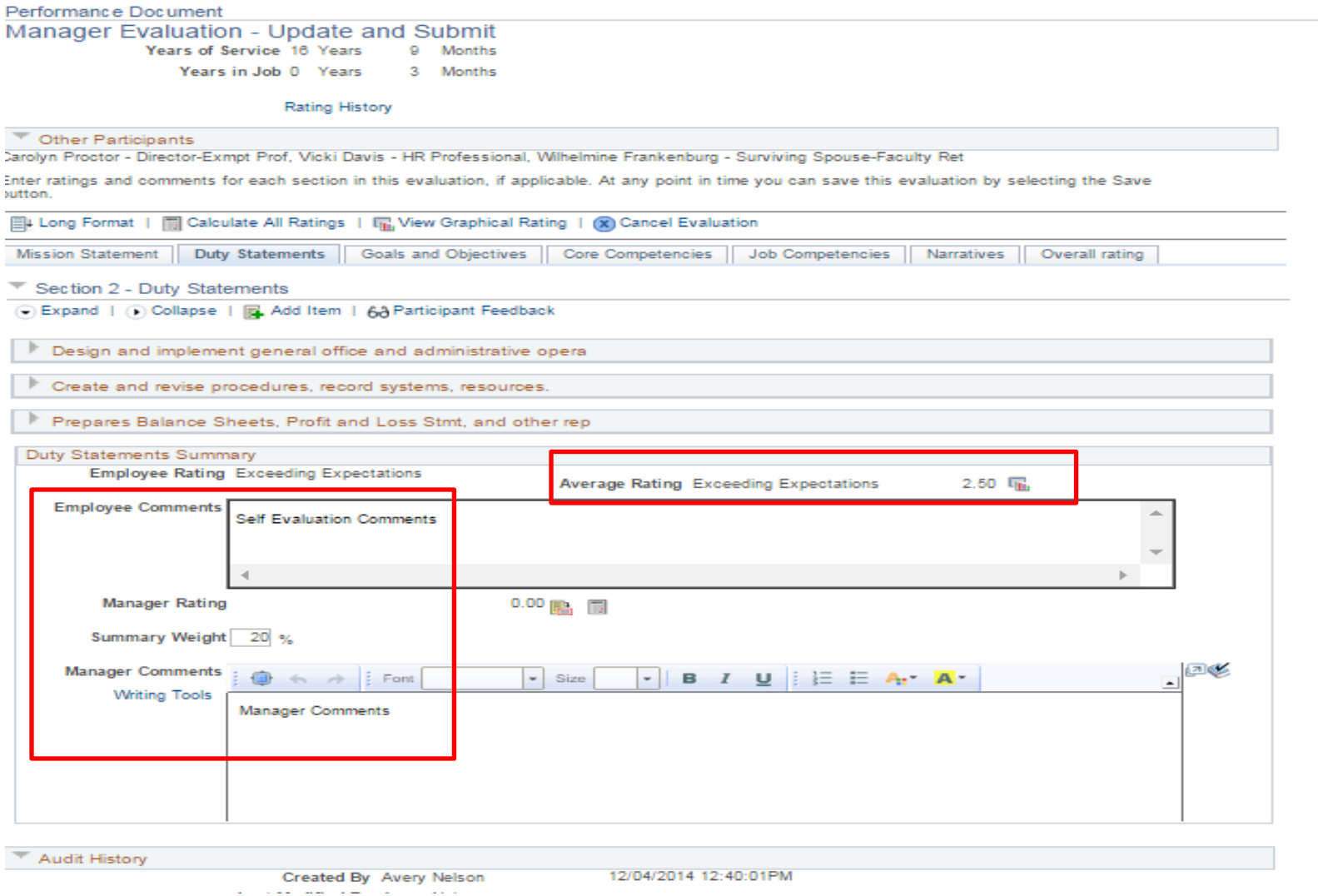


Peer Evaluation

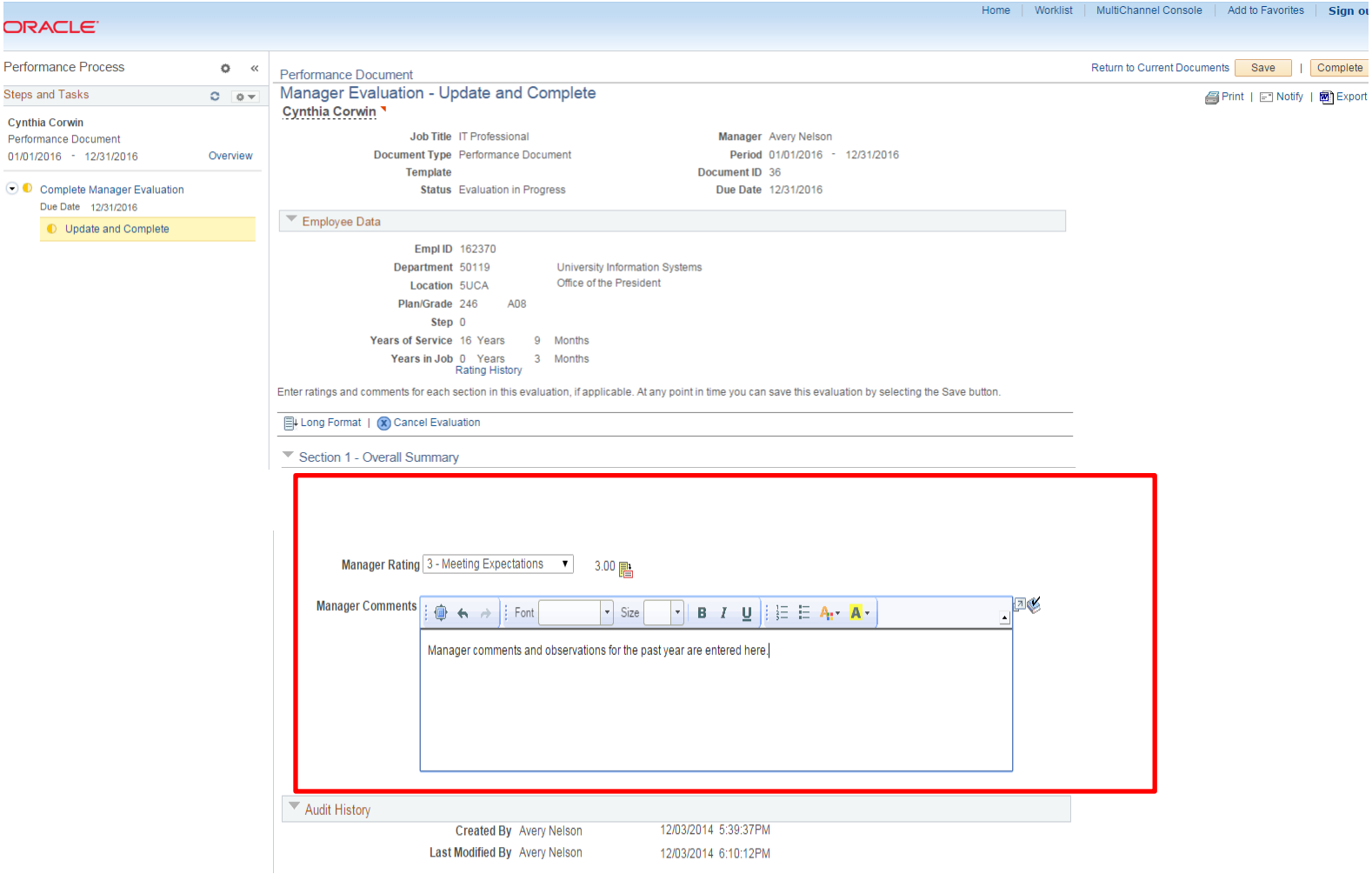




Manager/Employee Ratings



Annual Review



Security

- We want to be sure we create the right security roles for you.
- We're examining the Business Partner Role.
- Look for and participate in upcoming surveys.
- We may rename roles to better represent the business process to make requesting security easier.

Benefits & Payroll

Updates on Open Enrollment
and retirement plan changes

Retirement Vendor Transition

- Beginning on or around July 15, CU will contract with TIAA-CREF as the sole service provider for 401(a) and 403(b) plans.
- PERA plans (401k and 457) are not affected in this transition.
- This will include new, streamlined investment menus.
- Invest in highly rated funds from numerous retirement firms, including Vanguard and Black Rock.
- Attend on campus Transition Workshops or request one for your department.
- FAQs, timeline and background information can be found at www.cu.edu/nestegg

Open Enrollment

April				May
Monday	Tuesday	Wednesday	Thursday	Friday
27	28	29	30	1
		UCD Session	AMC Session	
4	5	6	7	8
	CU Boulder Session	System Session	UCCS Session	
11				
Ends at 5:00 PM				

What's New?

- Two-week enrollment period
- New plan: CU Health Plan-Extended
- CU Health Plan-Access Network will no longer be offered
- Pre-tax Healthcare Spending Account
- Plan name change - CU Health Plan – High Deductible *(HSA Compatible)*
- Optional Life Insurance – add or enroll by applying through The Standard

Enrollment

- Online enrollment through the portal at my.cu.edu
- New employees may need to complete two enrollments – one for 2014-15 and another for 2015-16