

# Business Partner Meetings

## March 2015

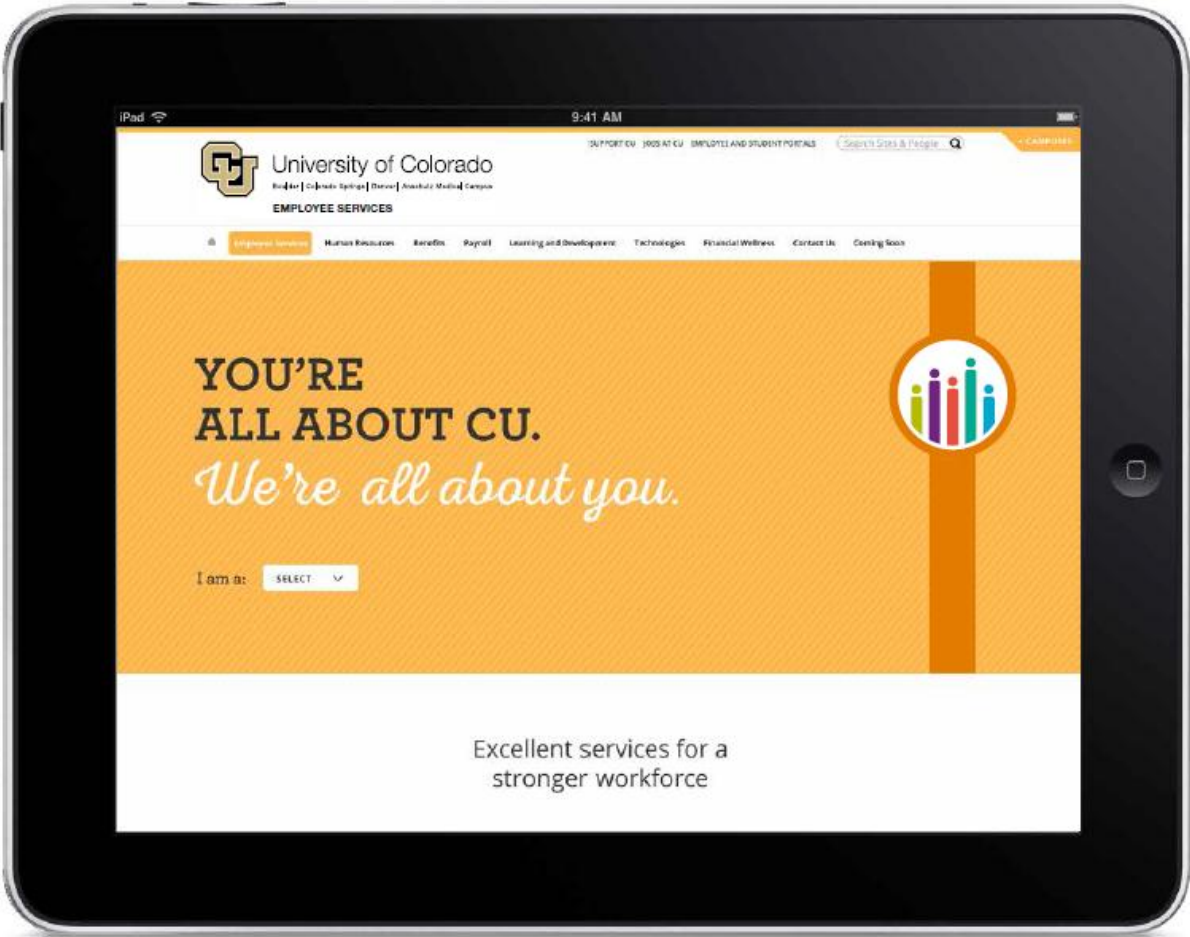


University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

# Employee Services



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

# Through their eyes



University of Colorado

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EMPLOYEE SERVICES

# Icons will guide the way

## AREA ICONS

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Employee Services



1 | Benefits & Payroll



2 | Collaborative  
HR Services



3 | Financial Wellness



4 | Career Advancement  
& Training



5 | The CU Advantage



# Employee Services



The flyer features a white background with orange and grey accents. At the top, an orange bar contains the text 'EMPLOYEE SERVICES' and a circular icon of four stylized human figures in purple, green, blue, and red. Below this, the main headline reads 'YOU'RE ALL ABOUT CU.' in bold black letters, followed by the tagline 'We're all about you.' in a cursive orange font. A central orange box contains the text: 'We're Employee Services and we're here to build a workforce that's stronger, healthier and more secure. **Starting with you.**' Below this are five service categories, each with a circular icon and a title: 'Benefits & Payroll' (blue icon with a heart and dollar sign), 'Collaborative HR Services' (purple icon with three figures), 'Financial Wellness' (green icon with a dollar sign and leaf), 'Career Advancement & Training' (red icon with a ladder), and 'Employee Perks' (teal icon with a star). Each category has a block of placeholder text below it. At the bottom, a black bar lists 'Web Resources | Seminars by Request | Private Financial Consultations'. The footer includes the University of Colorado logo and name, the 'EMPLOYEE SERVICES' title, and contact information: '1800 Grant St., Suite 400 | Denver, CO 80202 | Campus Box 400 UCA, General: 303-860-4300 | Fax: 303-860-4300 | Email: employeeservices@co.edu'.

EMPLOYEE SERVICES

**YOU'RE ALL ABOUT CU.**  
*We're all about you.*

We're Employee Services and we're here to build a workforce that's stronger, healthier and more secure. **Starting with you.**

**Benefits & Payroll**

**Collaborative HR Services**

**Financial Wellness**

**Career Advancement & Training**

**Employee Perks**

Web Resources | Seminars by Request | Private Financial Consultations

 University of Colorado  
Boulder | Colorado Springs | Fort Collins | Anschutz Medical Campus

EMPLOYEE SERVICES

1800 Grant St., Suite 400 | Denver, CO 80202 | Campus Box 400 UCA  
General: 303-860-4300 | Fax: 303-860-4300 | Email: employeeservices@co.edu

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

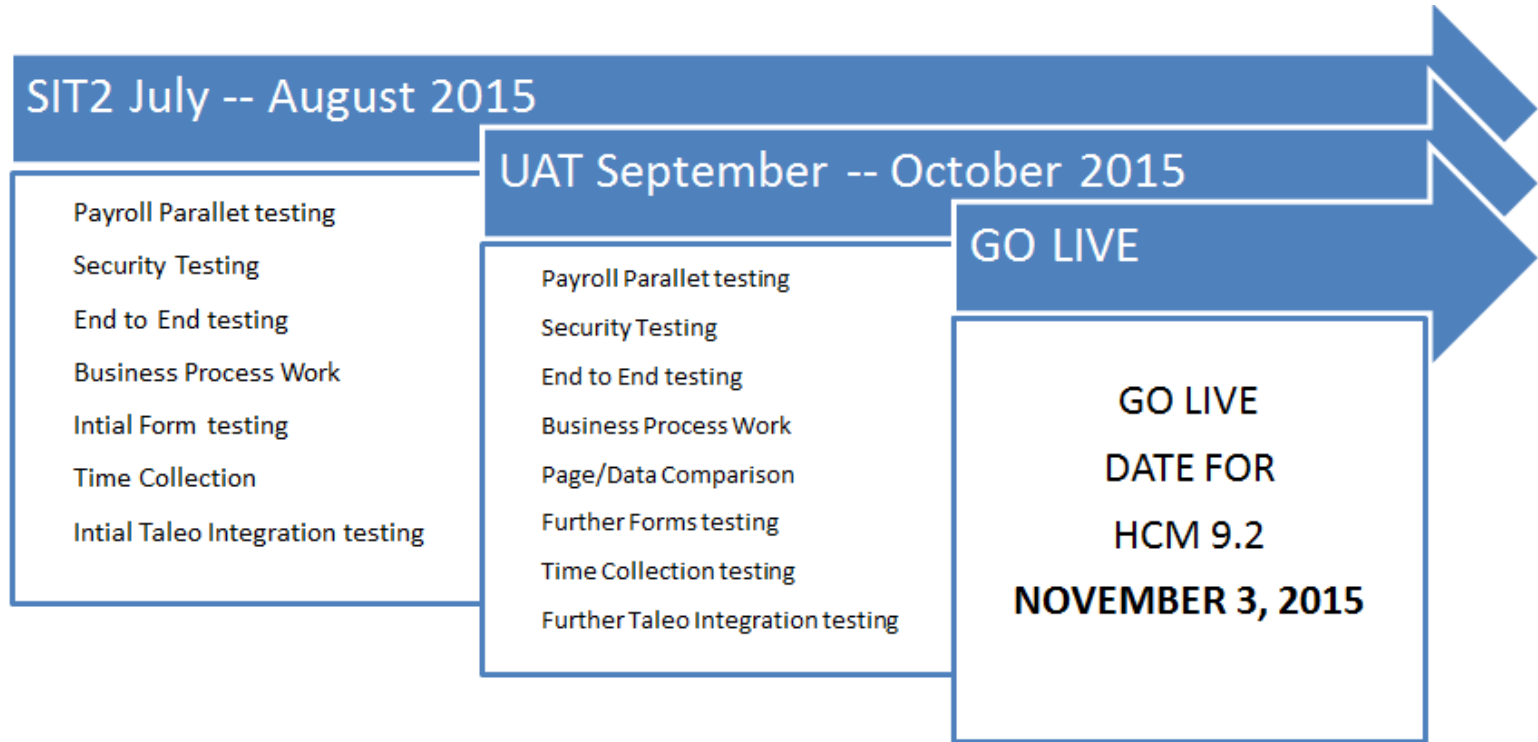


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EMPLOYEE SERVICES

# 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



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**EMPLOYEE SERVICES**



# CU Business Partner WorkCenter

[Favorites](#) | [Main Menu](#) > CU Business Partner WorkCenter
 
[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

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**ORACLE**


[Advanced Search](#)
[Last Search Results](#)
[Personalize Content | Layout](#)

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CU Business Partner WorkCe

BP WorkCenter | BP Resources

CU Business Partner Actions

- Add Employee/POI Actions
  - BP Add Employee/POI Actions Folder
  - Position / Position Profile
  - Taleo
  - Person (Employee / POI)
- Update Employee/POI Actions
  - Position / Position Profile
  - Smart BP Transactions

**My Work**

- My Action Items
- Worklist - Business Partner

**Queries**

- Query Manager
- Top Used Queries
- Location Code Table
- Personnel Roster Report
- Earnings Code Table
- POI Report
- Funding Distribution Report
- More Queries

**Reports/Processes**

- Reports/Processes
- Reporting Console
- Search Reports

CU Business Partner Dashboard

**Pending Approvals**

No approvals are pending at this time.

**Direct Line Reports**

Personalize | Find | View All | 1-4 of 4

Summary	Job Details	Contact	Career Plan	Compensation	Performance	Time
Name					Job Title	
Jane Wilson					HR Professional	
Mary Smith					HR Professional	
Michael Smith					Business Services Professional	
Nicole Johnson					Business Services Professional	

[View My Organization](#)  
[Headcount Analytics](#)

**Taleo**

My Requisitions Count: 0

My Candidates Count: 0

[Create Job Requisitions](#)

**Company Directory**

Search by Name, Job Title, Department, or Email

[Advanced Search](#)

**Anniversary Alerts**

No employee anniversaries at this time

**Birthday Alerts**

No employee birthdays at this time

**Alerts**

Jane Wilson's Birthday is on 03/05

[View All](#)

**My Reports**

Report	Folder
PER002	General
PER015	General

[Report Manager](#)

# Navigation Bundles and Page Access from within WorkCenter

## Worklist Access

The screenshot displays the Oracle WorkCenter interface for the 'Add/Update Position Info' page. The breadcrumb trail at the top reads: Favorites > Main Menu > CU Business Partner WorkCenter > Add/Update Position Info. The Oracle logo is visible in the top left, and a search bar with 'All' and 'Advanced Search' options is in the top right.

The left sidebar contains several navigation bundles:

- CU Business Partner WorkCenter**
  - BP WorkCenter
  - BP Resources
- CU Business Partner Actions**
  - Add Employee/POI Actions
    - BP Add Employee/POI Actions Folder
      - Position / Position Profile
      - Taleo
      - Person (Employee / POI)
  - Update Employee/POI Actions
    - Position / Position Profile
    - Smart BP Transactions
- My Work**
  - My Action Items
    - Worklist - Business Partner
- Queries**
  - Query Manager
  - Top Used Queries
    - Location Code Table
    - Personnel Roster Report
    - Earnings Code Table
    - POI Report
    - Funding Distribution Report
  - More Queries
- Reports/Processes**
  - Reports/Processes
    - Reporting Console
    - Search Reports

# PS Query – Frequently used queries

## Results display in WorkCenter

Oracle WorkCenter interface showing the CU\_EARNINGS\_CODE\_TBL - Earnings Code Table query results.

Download results in: Excel Spreadsheet CSV Text File XML File (20 kb)

View All	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	Addtl Medicare Payment	MEDICARE	01/01/1901	A
7	ATS	Addtl 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	FrzSckAdj	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	1HOLWKND	01/01/1901	A
19	2HW	2nd Shft Hol/Wknd-HlthCare Svs	2HOLWKND	01/01/1901	A
20	3HW	3rd Shft Hol/Wknd-HlthCare Svs	3HOLWKND	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 Hlry Weekday-HlthCare	2ndShfHlry	01/01/1901	A
26	2SW	2nd Shf Hlry Hol/Wknd HlthCare	2SHolWknd	01/01/1901	A
27	3HH	3rd Shift Hlry Wkday-HlthCare	3HlryWkday	01/01/1901	A
28	3SW	3rd ShfHlry Hol/Wknd-Hlth Care	3rd ShfHlry	01/01/1901	A
29	1SW	1st Shf Hlry Hol/Wknd HlthCare	1SFHolWknd	01/01/1901	A
30	ATH	Athletic 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	PYRTax	01/01/1901	A
41	RON	RONIS	RONIS	06/01/2006	A

First 1-100 of 173 Last

# BP Resources Tab

Provide helpful links that open within WorkCenter

The screenshot displays the Oracle WorkCenter interface for the University of Colorado. The top navigation bar includes 'Favorites', 'Main Menu', and 'CU Business Partner WorkCenter'. The Oracle logo is on the left, and a search bar is in the center. The right side of the top bar contains links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the top bar, the page header for the University of Colorado is visible, including the logo and the text 'University of Colorado' and 'EMPLOYEE SERVICES'. A navigation menu below the header lists 'Employee Services', 'Human Resources', 'Benefits', 'Payroll', 'Learning and Development', 'Technologies', 'Financial Wellness', 'Contact Us', and 'Coming Soon'. A dark brown banner contains a message about the recent Anthem data breach. Below this, a breadcrumb trail reads 'HOME / EMPLOYEE SERVICES / BUSINESS PARTNERS / PAYROLL PRODUCTION CALENDARS'. The main content area is titled 'I am a Business Partner' and features a 'Business Partners' sidebar with links to 'Jobs at CU', 'HRMS', 'My Leave', 'Forms', 'FAQ', and 'Payroll Production Calendars'. The 'Payroll Production Calendars' page content includes a heading, a paragraph stating that calendars are subject to change, a search bar, and a list of topics covered by the calendars. A footer note mentions that HR production will remain available during biweekly payroll.

CU Business Partner WorkCenter >

ORACLE All Search Advanced Search

CU Business Partner WorkCenter << BP WorkCenter BP Resources

Helpful Links

- Elevate
- Forms
- Pay Roles
- Payroll Calendars

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EMPLOYEE SERVICES

SUPPORT CU JOBS AT CU EMPLOYEE AND STUDENT PORTALS Search Sites & People CAMPUSES

Employee Services Human Resources Benefits Payroll Learning and Development Technologies Financial Wellness Contact Us Coming Soon

If you have questions about the recent Anthem data breach, please visit [anthemfacts.com](http://anthemfacts.com) for the most up-to-date information. The University of Colorado will continue to work with Anthem to provide you timely information related to the breach and resources to protect your personal information.

HOME / EMPLOYEE SERVICES / BUSINESS PARTNERS / PAYROLL PRODUCTION CALENDARS

## I am a Business Partner

Business Partners

- Jobs at CU
- HRMS
- My Leave
- Forms
- FAQ
- Payroll Production Calendars

## Payroll Production Calendars

Payroll production calendars are subject to change at any time. Please check this page often for updates.

What these calendars provide +

HR production will remain available during biweekly payroll

- time collection approval deadlines
- deadlines to submit W-4, direct deposit and retroactive pay forms to Employee Services
- campus deadlines for payroll paperwork and HRMS entry
- HR production deadlines for approval of job, position and funding updates
- Employee Services' deadlines for departments to request check stops and direct deposit reversals (bank pulls)
- "gray days," when the HRMS production database is unavailable due to payroll processing
- biweekly, monthly and special off-cycle payroll periods, dates, and the associated pay run IDs
- availability of payroll registers
- scheduled campus holidays

processing. All posted entry and approval deadlines must be met to update data that will be processed during a specific pay period. Please contact the Employee Services help desk at 303-860-4200 if you have questions.

100%

# ePerformance Overview



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**EMPLOYEE SERVICES**

# 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° 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° 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

ORACLE

## Create Performance Documents

### Employee Selection Criteria

Select the employees you are creating new performance documents for.

As Of Date 09/03/2014



Refresh Employees

Avery Nelson's employees Personalize | First 1-7 of 7 Last

Select	Name	Empl ID	HR Status	Job Title	Department
<input type="checkbox"/>	Abdisalam Aimad	228333	Active	IT Senior Prof	University Information Systems
<input type="checkbox"/>	Cynthia Corwin	162370	Active	IT Professional	University Information Systems
<input type="checkbox"/>	Eric Bolinger	242649	Active	IT Senior Prof	University Information Systems
<input type="checkbox"/>	Karthik Chigururu	245021	Active	IT Senior Prof	University Information Systems
<input type="checkbox"/>	Mayank Mittal	259237	Active	IT Professional	University Information Systems
<input type="checkbox"/>	Reid March	262387	Active	IT Professional	University Information Systems
<input type="checkbox"/>	Yuki Busch	122175	Active	IT Senior Prof	University Information Systems

Select All Deselect All

Continue



# Review of Historical Ratings

Performance Document Return

## Manager Evaluation - Update and Complete

Location 5UCA Office of the President  
Plan/Grade 246 A08

Years  
Ye

Enter ratings and comment

Long Format | X C

Section 1 - Overall

Manager Rating

Manager Comment

### Rating History

Evaluatee Cynthia Corwin Empl ID 162370  
Document Type Performance Document End Date 12/31/2016

Begin Date▲	End Date	Overall Rating Description	Job Title
01/01/2010	12/31/2010	2 - Below Expectations	Director-Exmpt Prof
01/01/2011	12/31/2011	3 - Meeting Expectations	Director-Exmpt Prof
01/01/2012	12/31/2012	3 - Meeting Expectations	HR Director
01/01/2013	12/31/2013	4 - Exceeding Expectations	HR Director
01/01/2014	12/31/2014	5 - Outstanding	IT Professional
01/01/2015	12/31/2015	4 - Exceeding Expectations	IT Professional

Return

Audit History

Created By: Avery Nelson 12/02/2014 5:30:37PM

# Employee Talent Summary

## In the Talent Summary Page:

Talent Summary

Personalize C

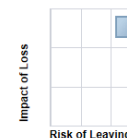
**Rosanna Channing** ✨

Actions



Job Title Senior Manager-Accounting  
Job Code 600135  
Address 4500 Corporate Lane  
Pleasanton, CA 94588  
Work Phone 925.555.1234  
Location Corporation Headquarters  
Building 2000  
Email HCMGENUser1@ap6023fems.us.oracle.com  
Full/Part Time Full-Time  
Employee ID KU0046  
Birthday 01/04

HR Status Active  
Org Relationship Employee  
Talent Category Achiever ☆☆☆☆  
Last Start Date 08/29/1986  
Years of Service 28.3  
Date in Current Job 11/04/2008  
Years in Current Job 6.1  
Last Performance Period Jan 2012 to Dec 2012  
Potential Rating High Potential Candidate  
Last Performance Rating Exceeds Expectations



[Return To Manager Dashboard](#)

**Job Related Competencies**

No Job Related Competencies have been set up for Rosanna Channing.

**Personal Competencies**

Competency	Proficiency
Business Banking	3-Good
Develop & implement solutions	4-Very Good
Directiveness/Assertiveness	5-Expert
Financial Accounting	4-Very Good
Financial Analysis	4-Very Good

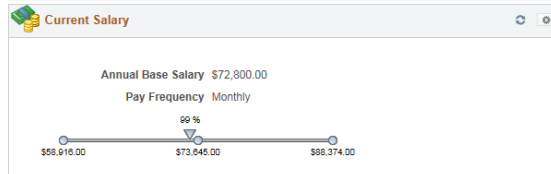
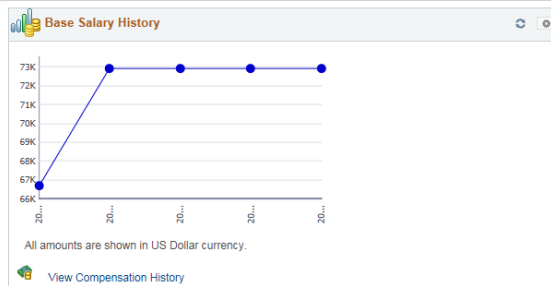
[View All 10](#)

**Learning**

Could not find a valid remote node or not configured.

**Responsibilities**

Responsibilities	Proficiency
	4-Very Good



**Career History**

Job Title	Job Code	Start Date	End Date
Senior Manager-Accounting	600135	11/04/2008	
Manager-Finance	600085	08/29/1986	11/03/2008

[View Details](#)

# Performance Work Centers

ORACLE

Performance Process <<

Performance Document

## Manager Evaluation - Update and Submit

Cynthia Corwin

Job Title IT Professional      Manager Avery Nelson

Document Type Performance Document      Period 01/01/2014 - 12/31/2017

Template      Document ID 43

Status Evaluation in Progress      Due Date 01/30/2018

**Steps and Tasks**

Cynthia Corwin  
Performance Document  
01/01/2014 - 12/31/2017      Overview

- Define Criteria  
Due Date 12/31/2017
- Checkpoint 1  
Due Date 07/04/2017
- Finalize Criteria  
Due Date 12/01/2017
- Nominate Participants  
Due Date 12/01/2017
- Review Participant Evaluations  
Due Date 01/15/2018
- Review Self Evaluation  
Due Date 01/15/2018
- Complete Manager Evaluation  
Due Date 01/30/2018
- Update and Submit**  
Pending Approval  
Complete

**Employee Data**

Empl ID 162370

Department 50119      University Information Systems

Location 5UCA      Office of the President

Plan/Grade 246      A08

Step 0

Years of Service 16 Years      9 Months

Years in Job 0 Years      3 Months

Rating History

**Other Participants**

Carolyn Proctor - Director-Exmpt Prof, Vicki Davis - HR Professional, Wilhelmine Frankenburg - Surviving Spouse-Faculty Ret

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings | View Graphical Rating | Cancel Evaluation

Mission Statement | Duty Statements | Goals and Objectives | Core Competencies | Job Competencies | Narratives | Overall rating

**Section 1 - Mission Statement**

Expand | Collapse

Mission 1: Campus Mission Statement and Strategic Goals

Mission 2: Campus Mission Statement and Strategic Goals

**Audit History**

Created By Avery Nelson      12/04/2014 12:40:01PM

Last Modified By Avery Nelson      12/08/2014 8:42:12AM

# Create Performance Plan – Define Criteria

ORACLE

## Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

Document Creation Details			
Period Begin Date	01/01/2014 <input type="text"/>	Period End Date	12/31/2017 <input type="text"/>
Document Type	Performance Document <input type="text"/>		
Clone from Prior Document	No <input type="text"/>		
Template	Classified Staff <input type="text"/>		

Create Documents

### Selected Employees

Employee ID

162370

[Return to Select Employees](#)

Performance Process

Steps and Tasks

Cynthia Corwin

Performance Document

01/01/2017 - 12/31/2017

[Overview](#)

Define Criteria

Due Date 12/31/2017

Update and Approve

Checkpoint 1

Due Date 07/04/2017

Finalize Criteria

Due Date 12/01/2017

Nominate Participants

Due Date 12/01/2017

Review Participant Evaluations

Due Date 01/15/2016

Review Self Evaluation

Due Date 01/15/2016

Complete Manager Evaluation

Due Date 01/30/2016

ORACLE

Performance Document

Define Criteria - Update and Approve

Cynthia Corwin

Job Title IT Professional

Document Type Performance Document

Template Classified Staff

Status In Progress

Manager Avery Nelson

Period 01/01/2017 - 12/31/2017

Document ID 42

Due Date 12/31/2017

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

Long Format

Duty Statements

Goals and Objectives

Core Competencies

Job Competencies

Narratives

Section 1 - Duty Statements

Duty Statements will be evaluated by: Employee, Manager, Peers

Add Item

Duty Statements Summary

Section Weight  %

Audit History

Created By Avery Nelson

12/04/2014 12:29:41PM

# Optional Checkpoints

**ORACLE**

Performance Process ⊙ ⏪

Steps and Tasks ↻ ⏵

Cynthia Corwin  
Performance Document  
01/01/2014 - 12/31/2017 Overview

- Define Criteria  
Due Date 12/31/2017
- Checkpoint 1**  
Due Date 07/04/2017
  - Update and Share**  
Review with Employee
- Finalize Criteria  
Due Date 12/01/2017
- Nominate Participants  
Due Date 12/01/2017
- Review Participant Evaluations  
Due Date 01/15/2018
- Review Self Evaluation  
Due Date 01/15/2018
- Complete Manager Evaluation  
Due Date 01/30/2018

Performance Document

## Checkpoint 1 - Update and Share

**Cynthia Corwin**

Job Title IT Professional  
Document Type Performance Document  
Template Classified Staff  
Status In Progress

Manager Avery Nelson  
Period 01/01/2014 - 12/31/2017  
Document ID 43  
Due Date 07/04/2017

Your comments are currently not shared with your employee

1. Enter your comments on the employees progress against their performance criteria.
2. When ready select the Share with Employee button save your changes and notify the employee your comments have been shared. This can be done before or after you meet with the employee to discuss their progress.
3. Once you have shared your comments and had a discussion select the Complete Checkpoint button to mark this step as complete.

Long Format

Duty Statements Goals and Objectives Core Competencies Job Competencies Narratives

Section 1 - Duty Statements

Duty Statements will be evaluated by: Employee, Manager, Peers

Expand | Collapse | Add Item

- Design and implement general office and administrative opera
- Create and revise procedures, record systems, resources.
- Prepares Balance Sheets, Profit and Loss Stmt, and other rep

Duty Statements Summary

Manager Comments

Section Weight 20 %

Audit History

Created By	Avery Nelson	12/04/2014 12:40:01PM
Last Modified By	Avery Nelson	12/04/2014 12:42:16PM
Approved By	Avery Nelson	12/04/2014 12:42:16PM

# Peer Evaluation

**ORACLE**

Performance Process

Steps and Tasks

Cynthia Corwin  
Performance Document  
01/01/2014 - 12/31/2017

Overview

- Define Criteria  
Due Date: 12/31/2017
- Checkpoint 1  
Due Date: 07/04/2017
- Finalize Criteria  
Due Date: 12/01/2017
- Nominate Participants  
Due Date: 12/01/2017

Add Nominees

Track Nominations

Performance Document  
**Nominate Participants - Add Nominees**  
Cynthia Corwin

Job Title: IT Professional  
Document Type: Performance Document  
Template: Classified Staff  
Status: In Progress

Manager: Avery Nelson  
Period: 01/01/2014 - 12/31/2017  
Document ID: 43  
Due Date: 12/01/2017

You have selected nominations for addition. The nominations will be added when the transaction is saved.

Participant Role: Peers  
Minimum Required: 0 Maximum Available: 8

Nominations	
Nominee	Action
Carolyn Proctor	

**ORACLE**

## Pending Evaluation Requests

Pending Evaluation Requests		
Name	Document Type	Due Date
<input type="checkbox"/> Cynthia Corwin	Performance Document	01/15/2018

Select All      Deselect All

Accept      Decline

# Manager/Employee Ratings

Performance Document

## Manager Evaluation - Update and Submit

Years of Service 16 Years 9 Months

Years in Job 0 Years 3 Months

Rating History

### Other Participants

Jarolyn Proctor - Director-Exmpt Prof, Vicki Davis - HR Professional, Wilhelmine Frankenburg - Surviving Spouse-Faculty Ret

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Calculate All Ratings | View Graphical Rating | Cancel Evaluation

Mission Statement | Duty Statements | Goals and Objectives | Core Competencies | Job Competencies | Narratives | Overall rating

### Section 2 - Duty Statements

Expand | Collapse | Add Item | Participant Feedback

Design and implement general office and administrative opera

Create and revise procedures, record systems, resources.

Prepares Balance Sheets, Profit and Loss Stmt, and other rep

### Duty Statements Summary

Employee Rating Exceeding Expectations

Average Rating Exceeding Expectations

2.50

Employee Comments

Self Evaluation Comments

Manager Rating

0.00

Summary Weight 20 %

Manager Comments

Writing Tools

Manager Comments

### Audit History

Created By Avery Nelson

12/04/2014 12:40:01PM

# Annual Review

ORACLE Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

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Performance Process Return to Current Documents | Save | Complete

Steps and Tasks Print | Notify | Export

Cynthia Corwin  
Performance Document  
01/01/2016 - 12/31/2016 Overview

Complete Manager Evaluation  
Due Date 12/31/2016  
**Update and Complete**

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Performance Document  
**Manager Evaluation - Update and Complete**  
Cynthia Corwin

Job Title	IT Professional	Manager	Avery Nelson
Document Type	Performance Document	Period	01/01/2016 - 12/31/2016
Template		Document ID	36
Status	Evaluation in Progress	Due Date	12/31/2016

Employee Data

Empl ID	162370
Department	50119 University Information Systems
Location	SUCA Office of the President
Plan/Grade	246 A08
Step	0
Years of Service	16 Years 9 Months
Years in Job	0 Years 3 Months

Rating History

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Long Format | Cancel Evaluation

Section 1 - Overall Summary

Manager Rating 3 - Meeting Expectations 3.00

Manager Comments

Manager comments and observations for the past year are entered here.

Audit History

Created By	Avery Nelson	12/03/2014 5:39:37PM
Last Modified By	Avery Nelson	12/03/2014 6:10:12PM



# 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

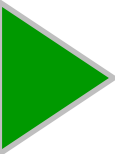



# Retirement Vendor Transition

- 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](http://www.cu.edu/nestegg)



# Open Enrollment

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



# 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](http://my.cu.edu)
- New employees may need to complete two enrollments – one for 2014-15 and another for 2015-16