

University of Colorado Boulder | Colorado Springs | Denver | Anschutz Medical Campus EMPLOYEE SERVICES

Life Cycle Exercises Research Faculty Member

Create and Approve a Position Jobs at CU—Recruiting Hire Record Sick Leave in Time Collection Terminate

Professional Research Assistant

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Life Cycle of a Research Faculty Member – Professional Research Assistant

This group of exercises will follow the life cycle of a Professional Research Assistant (PRA) from position creation through termination. We will work with a PRA in the School of Medicine – Adult Clinical Research Center.

Create and Approve a Position Record Open Position in Jobs at CU Hire Record Sick Leave in Time Collection Terminate

Notes:

These exercises are for use in the HRMS Practice Area database during classroom training only. In order to complete the sick leave entry in Time Collection, you will need to date the position and the hire prior to the monthly Time Collection pay period end date that is pre-set in this practice area database. Ask your instructor for the pay period end date and date your position and hire accordingly. If you choose not to do the time collection exercise, you may date the position and hire date with any date.

Exercise 1 – Create and Approve a Professional Research Assistant (PRA) Position

Scenario: Create and approve the PRA position.

Step 1: Navigation: Home; Organizational Development; Position Management; Maintain Positions/Budgets; Add/Update Position Information; <u>Add a New Value</u>

Add/Update Position Info									
Enter any information you have	e and click Search	n. Leave fields blank for a list of all values.							
Find an Existing Value									
Position Number:	begins with 💌								
Description:	begins with 💌								
Position Status:	= 🗸	✓							
Business Unit:	begins with 💌	Q.							
Department:	begins with 💌								
Job Code:	begins with 💌	Q.							
Reports To Position Number:	begins with 💌								
🗹 Include History									
Search Clear Basic Search 🖶 Save Search Criteria									
Find an Existing Value Add a	New Value								

Step 2:

On the Description page, enter the following:

Effective Date:	Enter the date you want the position available. Date must be
(required)	on or prior to the date of hire for the new PRA
Job Code:	1310 (Professional Research Assistant)
(required)	
Department: (required)	20234 (SOM-Adult Clinical Rsrch Cntr)
Location Code (required)	2UD Defaults from Department. May be changed if necessary
Reports To: (required for classified employees)	Select the position # of the supervisor/evaluator for this PRA position. In the practice area, there may not be an appropriate position to use for your PRA; just pick a position of your choice from the list
Position Notes: (optional)	Comments may be entered only after position has been saved

Notes:

HRMS uses auto-numbering to assign numbers to positions and employees. The system will assign the next available number upon saving.

The Appointing Authority field is not required, use if desired.

The 7 Checkboxes are informational only; use if applicable.

The Faculty/Exempt Professional – Proposed Costs section is informational only; use if desired.

The Regular/Temporary and Full/Part Time fields default based on the Job Code. Both fields have a direct relationship to whether or not this is a benefit eligible position.

The Percent of Time and Standard Hours fields are linked and are used to calculate leave accruals and benefit eligibility, when applicable.

Salary Plan Information values default from Job Code. A change to either one updates the other. FLSA defaults based on job code.

Step 3:

Compare your Description page with the one shown below. Because the Effective Date reflects the date you have entered, your page may differ from the one shown here:

Description Specifi	ic Information) Position and Incumbent Data)
(Save)	Control and incompetition Data)
Position Information		Find View All First 🚺 1 of 1 🕨 Las
Position Number:	00000000 Professional Research Asst	<u>Go To Position Funding</u>
Headcount Status:		Current Head Count: 0 out of 0
*Effective Date: 03/0	01/2007 🛐 Position Notes	*Status: Active 👻 Initialize
	New Position	Action Date: 03/06/2007
Position Status: Pro	pposed Status Date: 03/01/2007	
Job Information		
*Business Unit: UCO	DLO 🔍 University of Colorado	
Job Code: 1310	0 Q Professional Research Asst	Manager Level: Non-Manager 🖌 🗸
*Reg/Temp: Reg	gular 💌	'Full/Part Time: ≥= 50% 💙
Regular Shift: N/A		
Title: Profe	essional Research Asst	Short Title: PRA Detailed Position Description
Work Location		
*Reg Region: USA	United States	
Department: 2023		Company: CU University of Colorado
Location: 2UH		
Reports To:	Q	Appointing Q Authority:
Essential Serv		
Special Oppor	rtunity Posn 🔲 Preplacement Physical Requi	red Class Staff Spec Quals Officer Position
Faculty/Exempt Profes	ssional - Minimun	n Maximum
Proposed Costs	Salary Range:	
	Start Up Cost:	
	Moving Expense:	
	Total:	
Salary Plan Informatio	on	
FTE:	Percent of Time: 100.00	
Salary Admin Plan:	130 Grade: 130	
Standard Hours:	40.00 Work Period: W 🔍 W	eekly
	Mon Tue Wed Thu Fri	Sat Sun
	8.00 8.00 8.00 8.00 8.00	
USA	E unual and	
FLSA Status:	Exempt 💌	
Save 🖹 Notify	Previous tab Next tab	E+Add ZUpdate/Display Z In

Step 4:

Click <u>Specific Information</u> or use Specific Information link at bottom of page

Update Incumbents	Leave as is for position creation. When an employee is assigned to this position, the system will automatically check this box "on"
Pay Group and Employee Type (required)	Leave as is. These two fields default based on the Job Code. Most PRAs are paid on a monthly, salaried basis, but can be changed if needed
Background Checks (optional)	Select appropriate check boxes, if applicable
HIPPA Access check boxes	Currently used only for UCDHSC positions. Defaults based on UCDHSC Department
Requirements for Hazardous Materials Handling or Exposure (required)	Provide Yes or No answer

On Specific Information page, enter the following:

Notes:

Some information on Specific Information page defaults from information on Description page. The Calc Group (Flex Service) and Academic Rank fields are not used at CU at this time.

Step 5:

Compare your Specific Information page with the one shown below:

University _{of}
Colorado <u>HR89PRAC PRACT61 Home Worklist</u> Add to Favorites
Description Specific Information Position and Incumbent Data
📳 Save) 🔍 Return to Search) 🞼 Next in List) († 🗄 Previous in List) (🕸 Refresh) (🖉 Update/Display) (/// Include History)
Position Number: 00679681 Professional Research Asst Go To Position Funding
Headcount Status: Filled Current Head Count: 1 out of 1
Specific Information Find View All First I of 1 D Last
Effective Date: 03/01/2007 🗐 Position Notes Status: Active
Max Head Count:
Incumbents
Update Incumbents
'Pay Group: MON Q Monthly Employee Include Salary Plan/Grade
'Employee Type: Salaried 💌
Background Checks
Criminal History Records Financial History Records Confidential Position
Motor Vehicle Records Other Background Check Job Sharing Permitted
Education and Government
Classified Indicator: Rsrch Fac
FTE: 0.000000 Calc Group (Flex Service):
Adds to FTE Actual Count Academic Rank:
Required HIPAA Access Requirements for Hazardous Materials Handling or Exposure
PHI Payment Hazardous Chemicals OYes ONo
Treatment Operations Radioactive Materials/Ionizing Radiation Yes No
Research Infectious Matis/Human Blood or Bodily Yes No
Save Notify Previous tab Next tab
Description Specific Information Position and Incumbent Data

Step 6:

Click: System assigns new position number; make note of position number

Notes:

Position notes (comments) may be entered after saving.

Position and Incumbent Data

page is summary information populated when position is filled.

Step 7:

Click on <u>Go To Position Funding</u> link. Funding Distribution page displays in new window.

Funding Begin Date	Enter same date that was entered for position
(required)	
PCT Radio Button	Defaults to ON " Change to AMT if salary is recorded by
	estimated amount instead of percent
Distribution Row 1	
Percent:	75.00
(required)	
SpeedType:	61011113 (SOM Stdnt Divrst Fund)
(required)	
Funding End Date:	If left blank, funding is continuous. Check campus
(optional)	requirements for use of this field relative to EE group
Distribution Row 2	Click 🛨 to insert a new distribution row. Be sure to click
	the ± sign that is located in the Distribution section, <u>not</u> the Funding section
Percent:	25.00
(required)	23.00
SpeedType:	61023985 (Admissions Gen Exp)
(required)	(Admissions Cen Exp)
Funding End Date:	If left blank, funding is continuous. Check campus
(optional)	requirements for use of this field relative to EE group
Funding Notes	Record any comments relative to the funding for this
(optional)	position

Notes:

Funding Begin Date for <u>new</u> positions must match the new position effective date. When funding updates are made later on, the funding begin date will default to the first day of the current unprocessed pay period for the pay group (MON or BW).

Funding end date does NOT stop pav. Payroll expense will be recorded in **Suspense** SpeedType instead of departmental SpeedType if funding end date is exceeded.

When using multiple funding sources, the total of all distribution rows must equal 100% for each funding begin date.

Funding Distribution can be entered by amount or percent. If using estimated amount field, system automatically adjusts the percent to match the amount(s) entered.

End users cannot add, delete or correct funding for a pay period that has been closed. Funding changes for prior pay periods must be done with a Payroll Expense Transfer (PET).

Funding must be created and saved before position can be approved. Both funding and position require approval

Step 8:

Compare your Funding Distribution page with the one shown below. Your page may differ from the one shown here because Funding Begin and End Dates may differ.

University _{of} Colorado					HR89PRAC P	RACT61 Home	<u> </u>	Add to Favorites
						<u>N</u>	lew Window .	Customize Pag
unding Distribution <u>Position and Incumbent Data</u>								
Save) (QReturn to Search) (+≣Next in List) (†≣Previous in List) (≉Ret	fresh							
			Go To Pos	ition Data				
			and service of the service of the service	ding History				
nding	<u>Find</u> View	All First	🔳 1 of 1 🗈 L	ast				
Position Number: 00679681	Sequenc	:e: 0	Entered Date:	03/06/2003	7			
	Find View /	and the second	1 of 1 🕑 Las					
110100	tatus Date: () ppr/Reject:	13/06/2007						
Percent Speed Type Funding End Speed Date Descr		d Org	Program	Project	Sub Class	Proj Bdg End Date	Exp Transfer ID	<u>Transfer</u> <u>Status</u>
1 🛨 🖃 75.000 61011113 Q 📑 Som Divrst		20031	18198					
2 🛨 🖃 25.000 61023985 🔍 📑 Admis	ssions Exp 10	20031	18199					
Save Q. Return to Search 🐨 Notify 🕐 Refresh								nclude History

Step 9:

Click **Save**.

Make a note of the new position number. Your position is created and the position number is assigned

Approve the position and funding. (In the Practice Area, you are an approver. Depending on your security access in Production, you may or may not be an approver.)

Step 10:

Select Position Approval from the Navigation box on the left side of the screen – see below

Colorado					1	HR89PRAC	PRACT61 Hom	e <u>Worklist</u>	Add to Favori	tes Sign
nu 🖂										
rch:							1	New Window	Customize F	Page http
(>>	Funding Distribution	Position and Incu	Imbent Data							
y Favorites eports and Reviews	(Save) Q Return to Se	-	(↑≣ Previous in List	Befresh						
ecruiting	(concentration of		(12) Textindo Intelot,	(Hencestry)						
/orkforce Administration							Go To Pos	ition Data		
ompensation ime Collection							-	ding History		
/orkforce Development	Funding			Pho at	158	I First	I of 1 DL			
rganizational Development	runuing		-		View Al	I First	L 1 of 1 L L	ast		
Position Management	Position Number: 00	0679681	Ľ	+ -						
∀ Maintain Positions/Budgets				Se	quence:	0 6	Entered Date:	03/06/200	7	
- Add/Update Position				Eind	view All	First 4	1 of 1 🕑 Las	st		
Info		ſ	ຖື Funding 📊	-						
- Funding Distribution	Funding Sta	Photosocial	Notes	Status Da	nte: 03/	06/2007				
 Position Transfer only Position Approval 	'Funding Begin Date:	03/01/2007	Amt 💿 Pct	Appr/Reje	ect:					
- Funding Approval	Distribution Find	First 1-2 of 2) D Last							
PET/Retroactive			Funding End	SpeedType		1	1			Proj Bd
Funding Change	*Percen	t *Speed Type	Date	Description	Fund	Org	<u>Program</u>	Project	<u>Sub Class</u>	End Dat
 Correction PET PET Approval 			l lett	Som Stud						
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(Sponsored Proj) – PET Cancellation	2 + - 25.00	0 61023985 🔍	- III	Admissions Gen Exp	10	20031	18199			

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Step 11:

On the Position Approval page select the following:

Position Status: (required)	Approved
Position Notes:	Approver may add to position comments entered by end-
(optional)	user

Step 12:

Compare your Position Approval page with the one shown below. If you have entered comments, your page may differ from the one shown here:

Universityof						
Colorado				HR89PRAC PRA	CT61 Home	<u>Norklist Add to Favorites Sign o</u>
Menu 📃						
Search:					New	Window Customize Page 💼
▷ wy Favorities ↓ ▷ Reports and Reviews ↓ ▷ Recruiting ↓ ▷ Workforce Administration ↓ ▷ Compensation ↓	Description Spe Save) (Q Return to Position Number: leadcount Status:	Cific Information Position Approva Search) (+ElextinList) (+Elevious in Li 00679681 Open	ist) 🕼 Refresh)	/ 個 Updater <u>Go To Pr</u> ent Head Count:	/Display) (곋Inc osition Funding 0 out of (7
✓ Organizational Development				Find View All	First 🛃 1 (of 1 🕨 Last
- Add/Update Position	Short: PRA	ssional Research Asst	Į.	Essential Service	es	+-
 – Position Transfer only 	Description:				~	
	Approval Effective Date: 'Position Status:	03/01/2007 🗐 Position Notes	Reason Code: Status Date: Appr/Reject:	NEW New Posn 03/06/2007	Y	
	Save Return	to Search 🔄 Notify 🛛 🍫 Refresh	0			

Step 13:

Click (B Save). Position is approved

Note:

A position must be approved before you can hire someone into the position.

Step 14:

Select Funding Approval from the navigation box on the left side of the screen.

On the Funding Approval page select the following:

Funding Status: (required)	Approved
Funding Notes:	Approver may add to position comments entered by end-
(optional)	user

Step 15:

Compare your Funding Approval page with the one shown below:

In intensity a	-										
Universityof						_			**		
Colorado							HR89PRAC	PRACT61 Ho	me <u>Worklist</u>	Add to Favorite	es <u>Sign o</u>
Menu 😑											
Search:									New Window	Customize P	age http
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	(Funding)	Approval Funding	Distribution De	sition and Incu	mhont F	(ata)					
My Favorites	1 -		1 -			Jata					
▷ Reports and Reviews	📳 Save	Q Return to Search) (+	Next in List) (†≣ Prev	vious in List) (💈 i	Refresh		2 Update	/Display) 🖉	Include History)		
Recruiting Workforce Administration											
Compensation							9	Go To Positio	on Data		
▷ Time Collection	Funding				Fine	I View All	First 🗹 1	of 1 🕑 Last			
▷ Workforce Development					Line	21.100111.00					
▽ Organizational Development	Positio	on Number: 00679681			s	equence:	n Enter	red Date: r	13/06/2007		
							-	l of 1 🕑 Last			
⇔ Maintain					FID	d View Al	First 🖾 1	l of 1 🖾 Last			
Positions/Budgets – Add/Update Position	*Fundin	ng Status: Approved	*		Stat	us Date:	03/06/2007				
Info	i tirtain	ig status.			Stu	us Dute.	03/00/2007				
- Funding Distribution	Fundin	g Begin Date: 02/0	01/2007 Amt		ppr/Rej	ect:					
- Position Transfer only		05/0	1/2007								
- Position Approval	Distribu	ution							Custom	ize Find 🛗	First 🗹
- Funding Approval			Funding End	SpeedType					Sub Class	Proj Bdg	Бюр
- PET/Retroactive		rcent Speed Type	<u>Date</u>	Description	Fund	Org	Program	Project	SUD Class	End Date	Transfer
Funding Change		75 000 0404440		Som Stud	10	00004	10100				
 Correction PET PET Approval 	1	75.000 61011113		Divrst Fund	10	20031	18198				
- PET Approval				Admissions			-			1	
(Sponsored Proi)	2	25.000 61023985		Gen Exp	10	20031	18199				
- PET Cancellation	1 1	10	E	1.000000000		1.	1.	1.	1.	1	
▷ Review Position/Budget											
Info											
Position Reports											
Enterprise Learning											
▶ Reporting Tools											
	🔛 Save	Return to Search	🔚 Notify 🕺 🗘 R	efresh							
	and more adde			and the second							
	Funding Ap	oproval <u>Funding Distri</u>	bution Position a	nd Incumbent I	Data						

Step 16: Click Save). Position funding is approved

Creating and approving a research faculty position completed

Exercise 2 – Jobs at CU—Recruiting

Scenario: Jobs at CU is the university's online recruiting system for managing job searches, and is independent of HRMS. The system is used by Department Recruiting Liaisons (DRLs) and campus HR offices to enter and track posting specific information and manage applications. Postings are created in Jobs at CU based on approved positions in HRMS which have been assigned the action of "REC". Applicants use Jobs at CU to view and apply to University of Colorado job postings.

Note:

Check campus requirements for use of Jobs at CU for more information.

Step 1:

Navigation: Home; Organizational Development; Position Management; Maintain Positions/Budgets; Add/Update Positions; <u>Find Existing Value</u>

University _{of} Colorado					HR89PRAC PRACT61 Home	<u>Worklist</u>	Add to Favorites
■►							New Windov
Add/Update Position Inf	ō						
Enter any information you have	and click Search	n. Leave fields blank for a	list of all values.				
Find an Existing Value	dd a New Value	1		-			
Position Number:	begins with 💌	679681]				
Description:	begins with 💌]				
Position Status:	= 🗸		*				
Business Unit:	begins with 🔽		Q				
Department:	begins with 🔽]				
Job Code:	begins with 🔽		Q				
Reports To Position Number:	begins with 🔽]				
🗹 Include History							
Search Clear Bas	sic Search 🖶 S	Save Search Criteria					
Find an Existing Value Add a	New Value						

Enter position number and click

Search

Step 2:

Fields to populate:

Insert Row	
(required)	Click 🛨 to insert row
Effective Date defaults	Leave as is or change as necessary
(required)	
Choose Reason - REC	REC is Recruitment
Save	
REC Must Be Approved	Once approved, position will feed to Jobs and CU

Step 3: Compare Position Description page with one shown below.

Description	pecific Information \ <u>P</u> osition and Incumbent Data		
📳 Save) 🔍 Retur	n to Search) (+≣Next in List) (↑≣Previous in List) (≉Refresh) 🧔	袒 Update/Display) (週 Include History)
Position Informat	ion		Find <u>View All</u> First 💽 1 of 2 🕨 <u>Last</u>
Position Number:	00679682 Professional Research Asst		Go To Position Funding 🛨 🖃
Headcount Status	S: Filled	Current Head C	Count: 1 out of 1
*Effective Date:	02/02/2007 🛐 🗐 Position Notes	*Status:	Active
*Reason:	REC Q Recruitment	Action Date:	03/14/2007
Position Status:	Proposed Status Date: 03/14/2007		
Job Information			
*Business Unit:	UCOLO Q University of Colorado		
Job Code:	1310 Q Professional Research Asst	Manager Level:	Vice President
*Reg/Temp:	Regular 🗸	*Full/Part Time:	>= 50%
Regular Shift:	N/A		
Title:	Professional Research Asst	Short Title:	PRA Detailed Position Description
Work Location			
*Reg Region:	USA Q United States		

Jobs at CU Information Complete

Exercise 3 – Hiring and Approving a Research Faculty Employee

Scenario: A candidate for the position has been selected and must now be hired.

Step 1:

First, Search for Matching Persons to determine whether or not candidate already exists in HRMS. **Navigation:** Workforce Administration; Personal Information; Add a Person; Search for Matching Persons

University _{of} Colorado			HR89PR	AC PRACT61 Home Worklist Add to Favorites
Menu Search: My Favorites P Reports and Reviews Recruiting Workforce Administration Personal Information Biographical Organizational Relationships Personal Relationships Citizenship Add a Person Person Person Person Supmany Search for Matching Persons	∫ Add Person Person ID:	NEW Add the Person	Search for Matching Persons	<u>New Window</u> Customize Page

Step 2:

Search Criteria Page displays Enter as many fields as available Name fields are Case Sensitive

Click _	Search		
University _{of} Colorado			HR89PRAC PRACT61 Home Vorklist Add to Favorites Sian o
Menu - Search:			New Window http
My Favorites Reports and Reviews Recruiting Workforce Administration	Search Criteria Search Type: Person	✓ Ad Hoc Search	
 Personal Information ▶ Biographical ▶ Organizational 	Search Parameter: ADHOC_CU1	ADHOC_CU1	
Relationships ▶ Personal Relationships ▶ Citizenship — Add a Person — Modify a Person	Search Result Code: ADHOC_RESULT Search Result Code: ADHOC_RESULT Search Result Code: User Default	3_CU Q Adhoc Results CU	Search Clear All Carry ID Reset
 Person Organizational Summary 	Search Criteria		
 <u>Search for Matching</u> <u>Persons</u> Dob Information D Plan Salaries CU 	Search Fields First Name	Operand Value Begins With 🖌	٩
 ▷ Workforce Reports ▷ Compensation ▷ Time Collection ▷ Workforce Development ▷ Constant Development 	Middle Name	Begins With 💌	٩
 ▷ Organizational Development ▷ Enterprise Learning ▷ Reporting Tools 	Last Name	Begins With 💌	٩
	Date of Birth	Equals 💌 🚺	9
	National Id	Begins With 💌	Q

Step 3:

If person does not already exist in HRMS, begin the Add a Person process

If person does exist in HRMS, go to Add Employment Instance (Navigation: Home: Workforce Administration; Job Information; Add Employment Instance)

For this exercise, the candidate is NOT in HRMS Begin the **Add a Person** process

Navigation: Home; Workforce Administration; Personal Information; Add a Person

Step 4: Add a Person page displays

Colorad	do		HR83PRAC PRACT61 Home Worklist Add to Favorites Sign
Add Person			New Window Customize Page 🖷
Person ID: N	EW	Search for Matching Persons	
Ac	dd the Person		

Click: Add the Person

Step 5:

On Biographical Details page, enter or select the following:

Effective Date for Name	Date defaults to today's (system) date. Leave as is or
(required)	change to hire date or other appropriate date. This
_	date cannot be future-dated. Generally, effective
	date is the date of hire; however, the official date of
	hire will be recorded in Job Data. Having an earlier
	(non-hire) date recorded in Personal Information
	and the true hire date recorded in Job Data, allows
	setting up pre-employment records for future
	employees.

Notes:

The **Effective Date for Name** in Personal Information and the Hire Date in Job Data cannot be prior to the date you have created your position.

If you plan to do the time collection exercise in this HRMS practice area database, the hire date must be prior to the current monthly pay period end date. Check with the classroom instructor for this date.

Step 6 Click Add Name

Edit Name page displays:

Prefix:	Choose the appropriate value
(optional)	
First:	New employee's first name
(required)	
Middle:	New employee's middle initial
(required only if on	
SS card)	
Last:	New employee's last name
(required)	
Suffix:	Choose the appropriate value
(optional)	
Click OK to	
return to Biographical	
Details page	

Note:

The First, Middle and Last Name should be entered as it appears on the new employee's Social Security card.

Step 7: Biographical Details page fields:

Date of Birth	Enter DOB
(required)	
Gender:	Select from drop down list
(required)	
Highest Education Level:	
(optional)	Select from drop down list
Language Code:	Select from drop down list
(optional)	
Military Status:	Select from drop down list
(optional)	
Home Department:	Use search icon if needed 🔍
(required)	
Campus Box:	Use search icon if needed 🔍
(required)	
SSN/National ID	Required for all hires or POI with Security Access
(required)	

Step 8:

Compare your Biographical Details page with the one shown below:

Biographical Details Contact Information Identity/Diversity Organizational Relationships Person ID: NEW Primary Name Find View All First I of 1 Last IEff Date for Name: 03/01/2007 IEff Date Find View All First I of 1 Last IEff Date for Name: Display Name:	File Biographical Details Contact Information Identity/Diversity Organizational Relationships Person ID: NEW Primary Name Iff Date for Name: 03/01/2007 Iff Date for Name: 03/01/2007 Iff Date for Name: Meadows, Mary Edit Name Biographic Information 'Date of Birth: 01/01/1979 28 Years 2 Mintary Status Previous Non-Employee T- ID: Home Department 20234 SOM-Adult Clinical Rsrch Cntr	Universityof			
Biographical Details Contact Information Identify/Diversity Organizational Relationships Person ID: NEW Primary Name Find View All First f 1 of 1 f Last 'Eff Date for Name: 03/01/2007 is + - 'Format Type: English Display Name: Meadows, Mary Edit Name Biographical History Find View All First f 1 of 1 f Last 'Effective Date for PERSONAL DATA: Female Find View All First f 1 of 1 f Last 'Effective Date for PERSONAL DATA: Female Find View All First f 1 of 1 f Last 'Effective Date for PERSONAL DATA: Female Find View All First f 1 of 1 f Last 'Effective Date for PERSONAL DATA: Female Som-Aduit Clinical Rsrch Cntr Home Department 20234 SoM-Aduit Clinical Rsrch Cntr	Biographical Details Contact Information Identify/Diversity Organizational Relationships Person ID: NEW Primary Name Find View All First 1 of 1 Last 'Eff Date for Name: 03/01/2007 * 'Borrant Type: English Display Name: Meadows, Mary Biographical History Edit Name Biographical History End View All First 1 of 1 Last 'Effective Date for 03/01/2007 End View All First 1 of 1 Last 'Effective Date for 03/01/2007 End View All First 1 of 1 Last 'Effective Date for 03/01/2007 End View All First 1 of 1 Last 'Effective Date for 10/01/1979 * 28 Years 2 Months Biographical History End View All First 1 of 1 Last 'Effective Date for 10/01/1979 * 28 Years 2 Months Biographical History End View All First 1 of 1 Last 'Effective Date for 10/01/1979 * 28 Years 2 Months Biographical History End View All First 1 of 1 Last 'Binding Status Female I Previous Non-Employee T- South Adult Clinical Rsrch Cntr USA Social Security Number 20234 'Solial Security Number 206-48-09	Colorado			HR89PRAC PRACT61 Home Worklist Add to Favor
Person ID: NEW Primary Name Find View All First f 1 of 1 } Last 'Eff Date for Name: 03/01/2007 B Torate of Birth: 01/01/1979 B 28 Years 2 Months Biographical History Find View All First f 1 of 1 } Last 'Effective Date for PERSONAL DATA: Gender: Highest Education Levet: ANot Indicated FERPA Flag Military Status Find View All First f 1 of 1 } Last 'Effective Date for Sover Adult Clinical Risch Cntr	Person ID: NEW Primary Name Find [View All First 1 of 1] Last "Eff Date for Name: 03/01/2007 (i) (i) "Format Type: English (i) Display Name: Meadows, Mary Edit Name Biographic Information (i) "Date of Birth: 01/01/1979 (i) 28 Years 2 Months Biographical History Find [View All First 1 of 1] Last "Effective Date for 03/01/2007 "PERSONAL DATA: Female "Gender: A-Not Indicated "Highest Education Leve: A-Not Indicated Language Code: English "Display Name: 20234 SOM-Adult Clinical Rerch Cntr Campus Box Bi411 H8C SOM-Adult Clinical Rerch Cntr Campus Box Bi411 H8C Sold-Adult Clinical Rerch Cntr Campus Box Bi411 H8C Yational ID Customize [Find] View All [] View ID Primery ID Valional ID Customize [Find] View All]] Thetional ID Primery ID Valional ID Customize [Find] View All]] Vistorianal ID Primery ID		tact Information Identity/Diversity Organizational	Relationships	
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	Campus Box B141 HSC SOM-Adult Clinical Rsrch Cntr National ID Customize Find View All III First I or 1 IL Last Country National ID Type Hational ID Primary ID USA Social Security Number Izo6-48-0941 Image: Primary ID		20234 Q ROM Adult Olipical Barah Ontr		
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Country <u>National ID Type</u> <u>National ID</u> <u>Primary ID</u>		E Sava	winus tah Retrash	El Undate Dienlay	polude History
Country Hational ID Type Hational ID Primary ID USA Social Security Number 206-48-0941 Image: Country Security Number	ingraphical Datails I Contact Information I Identity/Diversity I Organizational Relationshine				

Step 9:

Click <u>Contact Information</u> or use the Contact Information link at the bottom of the page

Click Home Add Address Detail

University _{of}			
Colorado		HR89PRAC PR	ACT61 Home <u>Worklist</u> <u>Add to Favorites</u>
			New Window Customize Pa
<u>Biographical Details</u> Contact Information <u>Identity/Divers</u>	sity) <u>O</u> rganizational Relationships		
	Emplid:	NEW	
Current Addresses Customize Find Vi	iew All 🔠 🛛 First 💽 1-2 of 2 🕩 Las	4	
Address Type As Of Date Status Address			
Home 03/01/2007	Add Address Det	ail	
Mailing	Add Address Det	ail	
Phone Information Ousto	<u>mize Eind 🔠 First 💽 1 of 1 🕩 L</u>	act	
Phone Type Telephone	Extension Preferred		
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*Email Type *Email Address	Preferred	asi	
Campus 🗸			
Save Notify Previous tab Next tab	resh	//////////////////////////////////////	E Include History
Biographical Details Contact Information Identity/Diversity Org	anizational Relationships		

Step 10: Address History page displays

Click Address		
University _{of} Colorado		
Colorado		HR89PRAC PRACT61 Home Worklist Add to Favorites
		New Window Customize Page
Address History Address Type: Home		
Address History	Find First 🗹 1 of 1 🕨 Last	
'Effective Date Country 'Status Address: 03/01/2007 USA A A	+ - Add Address	
OK Cancel Refresh		

Step 11: Edit Address page displays

	ter Address	and click	ок	and then click	ОК	again.	
Univers	ity _{of} lorado					-	
Co	olorado				HR89PRAC PRACT	61 Home Vorklist	Add to Favorites
E •							
						New Window	Customize Page
Edit Address							
Country:	United States						
Address 1:	123 1st Street						
Address 2:							
City:	Denver	State: CO	Colorado	Postal: 80223			
County:							
OK Ca	incel						

Step 12:

Contact Information page re-displays

If Mailing address is different than Home address, click Mailing Add Address Detail and repeat steps 10 and 11

Contact Information Fields:

Phone Type:	Select the appropriate phone type.
(optional)	Enter the telephone number
	(Click 🛨 to add rows for additional phone #s)
Email Address(es):	Select the appropriate email Address type
(optional)	Enter the email address
	(Click 🛨 to add additional email addresses)

Notes:

The Campus 1 phone # and the Campus email address are used for the campus phone directories (both online and hard-copy directories).

When hiring a foreign student or employee, the home address must be the home address of their country of origin. The mailing address can be a local address.

University uses the mailing address for payroll advices, benefit information, W-2's and other employment related issues.

Step 13:

Compare your Contact Information page with the one shown below:

	ity _{of} lorado						HR89PRAC PR	ACT61 Home <u>Worklist</u> Add to Favorites
■►								New Window Customize Page
Biographical D	etails Con	tact Inforr	nation []dentity/D	Diversity Organiza	ational Relation Empl		NEW	
Current Addre	esses		Customize Fir	id View All 🔠 🛛 F	First 🔳 1-2 of 2	E Last		
Address Type	As Of Date	Status	Address	and an				
Home	03/01/2007	A	123 1st Street Denver, CO 80223	USA	EditView A Detail	<u>ddress</u>		
Mailing	03/01/2007	А	If Mailing Addr diffe Click ADD Addres	ers from Home Addr s Detail	Add Addres	<u>s Detail</u>		
Phone Inform	ation			Customize Find 🕮	First 🛃 1 of	1 🕑 Last		
<u>*Phone Type</u>	1	Telephone		Extension	Preferred	1		
Campus 1	~	303/724-5	555			+ -		
Email Address				Customize Find 🛄	First 💽 1 of	1 🕑 Last		
<u>*Email Type</u>		Email Add	ress		Preferred			
Campus	~	mary.mea	dows@uchsc.edu			Ξ		
		<mark>evious tab</mark> Informatio		Refresh	ationships		///Update/Display	Include History

Step 14:

Click Identity/Diversity or use the link at the bottom of the page

Ethnic Group: (required)	Select the appropriate ethnicity. Indicate which ethnic group is Primary
	(Use \bigcirc for options) (Click 🛨 to add additional ethnic groups)
Background Checks (optional)	Select checkboxes/enter dates that appropriate background checks were completed for this new hire

University _{of} Colorado				
Colorado		н	R89PRAC PRAC	<u> 161 Home Worklist Add to Favorites :</u>
				New Window Customize Page
Biographical Details Contact Information Identity/Diversity	Organizational Relationships			
	<u> </u>			
	Emplid:	NEW		
Ethnic Group	Find View All	First 🕙 1 of 1 🕨 Last		
Ethnic Group:	rimary)	+ -		
Employment Eligibility Proof	Background checks			
Soc. Sec. Card Copy Received	Criminal History R	lecords	3	
I-9 Effective Date	🗌 Financial History F	Records	31	
I-9 Expiration Date	Motor Vehicle Rec	cords	31	
I-9 Verifier Name	Other Background	d Check	31	

Step 15:

Click	Organizational Relationships
CHICH	

Organizational Relationships page displays.

Check Employee box

Click Add JOB/Relationship Data	or Save				
University _{of}					
University _{of} Colorado			HR89PRAC PRACT61 Home	Worklist	Add to Favorites
			<u>N</u>	ew Window	Customize Pag
Biographical Details Contact Information Clentity/Diversity	Organizational Relationships				
	Person ID: NEW				
Choose Org Relationship to Add					
✓ Employee	Add JOB/Relationship Data				
Person of Interest	Empi Red Nbr: 0		_		
Save Notify Previous tab Next tab Refresh Biographical Details Contact Information Identity/Diversity Organization		date/Display	Include History		

Step 16: Work Location page displays New Employee ID number is now assigned

Effective Date	Enter Date of Hire					
(required)						
Action/Reason:						
Action of Hire (required)	Defaults to HIR. Leave as is					
Reason (required)	Enter hire Reason from Look Up list					
Position	Enter Position number. Other fields will populate based on					
(required)	position number created in Exercise 1					
Job Notes	May be added on any page by clicking <i>Job Notes</i> icon					
	Notepad page displays					
	Click: Add a New Note					
	Enter note/comments					
	Click: Save					
	Click: Job Data Page to return to Work Location Page					

Step 17:

University _{of} Colorad	0			HR89PRAC PRACT61 H	lome Worklist Add to Favori
					New Window Customize F
Vork Location	nformation Payro	II Compensation Employment	Information		
feadows, Mary	EMP	ID:	189348 Empl R	tod #: 0	
Vork Location			Find View All F	irst 🕙 1 of 1 🕨 Last	
HR Status:	Active	Empl Status: Active	<mark>Calculate Status ar</mark>	<mark>id Date</mark> s	
Effective Date:	03/01/2007 🛐	Sequence: 👘 📋 Job Notes			
Action / Reason:	Hire	HIR 🤍 New Hire		Current	
Position Number:	00679681	Professional Research Asst	Position Entry Date:	03/01/2007	
Regulatory Region:	USA	United States	Position Data	00/01/2001	
Company:	CU	University of Colorado	Appointment End Date:		
Business Unit:	UCOLO	University of Colorado			
Department:	20234	SOM-Adult Clinical Rsrch Cntr	Department Entry Date:	03/01/2007	
Location:	2UH	University Hospital			
Establishment ID:	CU	University of Colorado			
Last Updated by:		Last Upd DtTm: 03/07/2	2007 10:58:37AM Date Crea	ated: 03/07/2007	
OK Cancel	Apply 🖉 🗠 Pres	vious tab 🔿 Next tab 🔥 Refresh			

Step 18:

Click Job Information or use the Job Information link at the bottom of the page						
Percent of Time and	Defaults from position data and can be updated. A change					
Standard Hours	to either one updates the other					
Reports to:	Defaults from Position Data					
Employee Class	Defaults from Job Code upon Saving					

Compare your Job Information page with the one shown below:

University _{of} Colora	do					CT61 Home VV	orklist Add to Favorites
							<u>Multon avoites</u>
						New W	(indow Customize Par
Work Location Job	Information	Payroll Compensat	tion Employment Info	rmation			
Meadows, Mary	L	EMP	ID:	189348	Empl Rcd #: 0		
Job Information				Find	View All First 💷 1 of 1	🕑 Last	
Effective Date: (03/01/2007	Sequence: 0	Job Ap	pr Status Propo	sed 03/01/2007		
Action / Reason:	lire	New Hire	Notes Ap	pr/Reject	Current		
Job Code:	1310	Professional Researc	ch Asst Entry Date:	03/01/200			
Reports To:							
Regular/Temporary:	Regular		Full/Part:	>= 50%			
Empl Class:			'Officer Code:	None	~		
Regular Shift:	N/A		Percent of	Time: 100.00			
Classified Indc:	Rsrch Fac						
Standard Hours							
Standard Hours:	40.00						
FTE:	0.000000	Adds to FTE Ac	:tual Count?				
▼ U SA							
FLSA Status:	Exempt						
OK Cancel	Apply	📻 Previous tab 🛛 🔿 Next f	tab 🖒 Refresh				

Step 19:

Payroll Click:

Payroll page displays

All fields default

Tax Location Code & FICA Status default from job code and location code. Can be updated if needed, but system will set the final FICA Status.

Compare your Payroll page with the one shown below:

										New Window	Customize F
Vork Location 🗍 Job Info	ormation Payr	oll <u>C</u> omper	sation	Employme	nt <u>I</u> nform	ation					
feadows, Mary	EMP				ID:	189348		Empl Rcd #:	0		
ayroll Information						Find	View All	First 💽 1 of	1 🕑 Last		
Effective Date: 03/01/2007 Action / Reason: Hire		Sequence: 0 New Hire		Job Appr Status Notes Appr/Reject		^o roposed	03/01/20 Curren				
'Payroll System:	Payroll for North Am	erica 👻									
Payroll for North Americ	a										
Pay Group:	MON Ma	onthly Employee									
Employee Type:	S Sa	laried		Но	iday Scl	edule:	NONE	No Hol :	Sch		
Tax Location Code:	DENVER	DENVER TAX		FIC	A Status	:	Subject	~			

Step 20:

Click Compensation

Compensation page displays

Frequency	Verify that M (monthly) has defaulted
Pay Components section	Enter: Rate Code BASEM
	Enter: Monthly Comp Rate (dollar amount of monthly pay)
Click	
Calculate Compensation	MUST click Calculate Compensation before proceeding

Note:

The Comp **Frequency** is the frequency of pay (contract, monthly, hourly) that the employee was quoted in the offer and defaults based on the Job Code at the position level. There are a few cases where this may need to be changed. It is important that this field matches the actual pay (comp) frequency for the employee and that the Rate Code at the bottom of the page reflects the correct Base Rate Code for the Comp Frequency.

Step 21: Compare your Compensation page with the one shown below:

lork Location │ Job Informat	ion <u>P</u> ayroll	Compensatio	Employm	nent Information	14.			
leadows, Mary	EMP			ID: 1893	148	Empl Rcd #:	0	
ompensation				Find	View All	First 🗹 1 of 1	🕑 Last	
Effective Date: 03/01/20 Action / Reason: Hire		Sequence: 0 New Hire	Job Note	Appr Statu	s Propose t	d 03/01/2 Curre		
Compensation Summary								
Base Compensation Rate:	3,500.0000	200	'Freq	uency: M	Monthly			
	3,500.0000	000						
Salary Administration Plan: Job Code: 1310 Profes	3,500.0000	000 5 130	f Time: 1		dard Hours:	40.00		
Total Compensation Rate: Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount:	3,500.0000 130 Grade: 1	000 5 130	f Time: 1 USD Month	Stan 100.00 FTE:	dard Hours: Ionthly Hrly R			
Salary Administration Plan: Job Code: 1310 Profes Comparative Information	3,500.0000 130 Grade: 1	000👮 130 Asst Percento		Stan 100.00 FTE:				
Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount: Change Percent:	3,500.0000 130 Grade: 1	000) 130 Asst Percento 0.000000		Stan 100.00 FTE:				
Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount: Change Percent:	3,500.0000 130 Grade: 1	000) 130 Asst Percent o 0.000000) 0.000		Stan 100.00 FTE:	onthly Hrly R			
Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount: Change Percent: Pay Rates	3,500.0000 130 Grade: 1 ssional Research	000) 130 Asst Percent o 0.0000000 0.000 0.000 0 USD	USD Month	Stan 100.00 FTE:	<mark>ionthly Hrly R</mark> 161.53	tate		
Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount: Change Percent: Pay Rates Annual Monthly Pay Components	3,500.0000 130 Grade: 1 ssional Research 42,000.00000	000) 130 Asst Percent o 0.0000000 0.000 0.000 0 USD	USD Month	Stan 100.00 FTE:	ionthly Hrly F 161.53 20.19	tate 8462 USD	Last	
Salary Administration Plan: Job Code: 1310 Profes Comparative Information Change Amount: Change Percent: Pay Rates Annual Monthly	3,500.0000 130 Grade: 1 ssional Research 42,000.00000 3,500.00000	000) 130 Asst Percent o 0.0000000 0.000 0.000 0 USD	USD Month	Stan 100.00 FTE: Ily	ionthly Hrly F 161.53 20.19	1ate 8462 USD 2308 USD First 1 of 1	Last	

Step 22:

Click <u>Employment Information</u> or use the Employment Information link at the bottom of the page

Employment Information page displays

Appointment End Date	Date the PRA's appointment ends
(optional)	

Notes:

Funding for the position must cover the full length of the PRA's appointment. If you enter an Appointment End Date, check to make sure the Funding End Date is equal to, or exceeds the length of the appointment. Review your campus processes regarding whether to record a date in the Appointment End Date field. It is required on all campuses for student job codes. For student employees, the appointment end date is frequently the same as the semester end date.

Employment Information page:

\mathbf{C}					Lafa ma				41.	~		h al arres
l or	nnare '	vour	Empl	ovmeni	miorm	1911On	naue	w/m	ine	one	snow/n	nerow/
COL	ipuic	your	Linpr	o ymene	mon	iuuon	puse	** 1111	une	one	5110 11 11	below:

University _{of}		
	HR89PRAC PRAC	CT61 Home Worklist Add to Favo
		New Window Customize
		51 54400
Work Location	Payroll Compensation Employment Information	
Save Q Return to Search + Next	nList) (1플 Previous in List) (호Refresh) (젤 Update/Display) (젤 Include History)	
Meadows, Mary	EMP ID: 189349 Empl Rcd #: 0	
Empl Rcd:	0 Univ Employment Date: 03/01/2007	
Last Start Date:	03/01/2007	
Termination Date:	Service Dt: 03/01/2007	
-		
Empl Record	Years Months Days	
Class Staff Seniority Date:	2000	
Class Staff Save Pay End Date:	₩ 0 0 12	
Business Title:	Classified Staff LOS:	
	Job Code Entry Date:	
USA		
12 Month Faculty 📃		
Appointment End Date:	🛐 Contract Length: Not Applice 🗸	
Accrue Tenure Services 🗌	🗇 FTE for Tenure Accrual:	
Service Calculation Group:	C FTE for Flex Service Accrual:	
Save Return to Search	Notify Previous tab Refresh	ay Include History

Step 23: Review and Save

For new hires, system automatically transfers to **Emergency Contact page**.

Enter contact Name & Relationship to Employee

Identify Primary Contact

If contact has same address and phone number as employee, check those boxes

If contact has other address, click 🛨 to insert a new row and then click Edit Address

Note that multiple emergency contacts can be designated by inserting rows.

Additional phone numbers can be entered on <u>Other Phone Numbers</u> page.

ntact Address/	Phone Ott	her Phone Numbers				New Window Customize P
eadows, Mary			En	nplid:	189348	
nergency Conta	ct		<u>Find</u> V	iew All	First 🗹 1 of 1 🕩 Las	
Contact Name:		Muddy Meadows	1 1940		+ -	
Relationship to I	Employee:	Spouse 🔽	Primary Contac			
-	10.1	Same Address as Employee	Address Type:	lome	~	
Return to Pers		Same Phone as Employee				
Employee's Cur						
Country:	USA	United States				
Address:	123 1st Denver,	Street CO 80223				
Contact Phone						
		-8792				

Step 24:

```
Review and 🗐 Save).
```

Make a note of the PRA's employee ID (EmplID) number

Approving the hire. (In the Practice Area, you are the approver. Depending on your security access in Production, you may or may not be an approver.)

Step 25:

Navigate to the **Job Approval** page using the navigation window on the left.

Colorado			HRSODRA	C PRACT61 Home Worklist	Add to Favorites
Menu 🖂			TINGSFILM		Auditoriavorites
Search:				New Windo	w <u>Customize Pac</u>
 My Favorites Reports and Reviews Recruiting Workforce Administration 	Contact Address/Phone Oth Meadows, Mary Emergency Contact	her Phone Numbers	Emplid: <u>Find</u> View All	189348 First	
Personal Information Job Information Contract Administration Review Job Information Reports Add Employment	'Contact Name: 'Relationship to Employee: Return to Personal Data	Muddy Meadows Spouse 🖌 Same Address as Employee	Primary Contact Address Type: Home	+ -	
Instance Job Data Job Data Job Data Job Data Job Data Transfer/Rehire Job Data Transfer/Rehire Job Approval Company Property Plan Staries CU Workforce Reports Compensation Otmensation Workforce Development Organizational Development Deterprise Learning	Employee's Current Address Country: USA Address: 1231st Denver,	united States			
▷ Reporting Tools	Contact Phone 303/465-	E Notify			

Step 26: This will bring up the Job Approval search page:

En	ter En	m	loyee ID and clicl	k _	Search					
Universit Col	Yof	Ŧ	loyce HD and ener	IX –						
	orado						HR89PRAC P	RACT61 Home	<u>VVorklist</u>	Add to Favorites
										New Windo
Job Approval										
Enter any informat	ion you have a	and	click Search. Leave fields blank for a	a list of a	ll values.					
∫ Find an Existing	j Value									
EmpliD:	begins with	~	189348							
Empl Red Nbr:	- ~] [
Name:	begins with	~								
Last Name:	begins with	۷								
Department:	begins with	۷	Q							
Last 4 SSN:	begins with	*								
HR Status:	- ~			~						
Employee Status:	= 🗸		1	*						
Search C	Clear Basi	c Se	earch 🚦 Save Search Criteria							

On the Job Approval page, enter the following:

Approval Status: (required)	Approved
Job Notes: (optional)	Approver may add to hire comments entered by end-user

Step 27:

Compare your Job Approval page with the one shown below:

Universityof	do			-			2 M 1 A
Colora	uo				HR89PRAC PRACT61 Home	Worklist	Add to Fay
					Ne	w Window	Customiz
Vork Location 🗎 Jol	Information Payroll Com	pensation Employ	ment <u>I</u> nformatior	Job Approval Cu	<u>م</u>		
🛿 Save) 🛛 🔍 Return to	Search) 斗≣ Next in List) (↑≣ Previous in List	🖉 Refresh					
Meadows,Mary	ID: 189348						
pproval			Find First	1 of 1 🕑 Last			
Effective Date:	03/01/2007 Sequence: 0 🗐 Jo	b Notes Payroll Sta	us: Active				
		-	da. Active				
Action:	HIR Hire Reason: HIR New	Hire					
Department:	20234 SOM-Adult Clinical I	Rsrch Cntr	Action Date:	03/07/2007			
Job Code:	1310 Professional Resea	arch Asst	%TIME:	100.00			
Position Number:	00679681 Professional Resea	arch Asst	Std Hrs/Wk:	40.00			
Pay Rate Data							
Annual Rate:	42000.000 Comp Freq:	М					
Monthly Rate:	3500.000						
Hourly Rate:	20.192308						
Approval Status: 🛛	proved 🔽 Status Date: 03/07/20	07 Appr/Reject:					
		1	1				
Save Return to	Search 🔄 Notify 🕞 Previous tab	Next tab	Refresh				
rk Location Job Info	mation Payroll Compensation Em	ployment Information	Job Approval C	i .			

Step 28:

Click (Save). The PRA has been hired and approved.

Hire New Research Faculty Member and Approving the Hire completed

Page 25 of 36

Exercise 4 – Entering and Approving Sick Leave for a Research Faculty Employee

Scenario: PRA has turned in monthly employee work record to department payroll personnel liaison (PPL). Now, acting as the PPL, enter employee's sick leave into Time Collection.

Step 1:

Navigation: Home; Time Collection; Batches; Batch Header



Step 2: Batch Header (Header Control) page displays

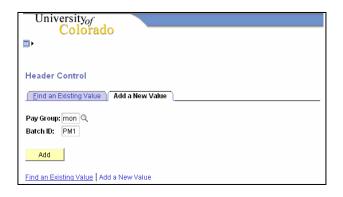
Click: Add a New Value

Pay Group:	MON (Monthly Pay Group)
(required)	
Batch ID:	Three alpha/numeric characters to identify the batch
(required)	

Notes:

Batch IDs may be reused from pay period to pay period.

Different Batch IDs must be used to create multiple batches in the same pay group and within the same pay period.



Step 3:

Click: Add

Batch Header page displays

Description:	Enter something that will remind you of this batch
(optional)	
Batch Status	Defaults as Open. Leave as is

Click 📳 Save)

Step 4:

Compare your Batch Header page with the one shown below:

Company:	CU	University of Colo	rado	Batcl	h ID: MP	1
Pay Group:	MON	Monthly Employee	9	Batch Source: O Online		Online
Pay End Date:	02/28/200	7				
Created By:	187639					
	Description	.	Batch Totals	6		
			EE Count:	0	Pay Amt:	\$0.00
📃 One Time P	ayment Onl	y?	Addi Amt:	\$0.00	Hours:	0.00
Batch Status			Approved Te	otals		
Open Approved Cancelled		EE Count:	0	Pay Amt:	\$0.00	
O Ready		Processed	Addi Amt:	\$0.00	Hours:	0.00

Step 5:

Navigate to the **EE Data-Current Appointment** page using the left-hand navigation menu.

EE Data search page displays

On this EE Data –	Current Appointment	search page, e	inter the following:
• =		r	

Pay Group:	Defaults to MON. Leave as is
(required)	
Batch ID:	Defaults to the Batch ID entered
(required)	
Employee ID	Enter Employee ID #. May also enter Department and any
	other search categories
Click Search	

Note:

If you have only a few employees to enter into a batch you should search by Employee ID # (EmplID). If you search by Name, Last Name or % Sign, you must also enter your department number. If you enter time records for multiple departments, you can enter data for only one department at a time.

Universityof				10	
Colorado					HR89PRAC PRACT61 Home
Menu 🖃					
Search:					
\otimes					
wy avones	EE Data - C				
	Enter any inforr	nation you hav	e and click Search.	Leave fields blank for a list of a	ll values.
▷ Recruiting					
Workforce Administration	∫ Find an Exist	ting Value			
▷ Compensation ▽ Time Collection					
	Pay Group:	begins with	🗸 mon		
– <u>Batch Header</u>	Batch ID:	begins with	mp1	Q	
- EE Data - Current					
Cipportititionite	Department:	begins with	× _	Q	
 <u>EE Data - Expired</u> Appointment 	EmpliD:	begins with	189348		
	Empl Rcd Nbr:	= 🗸			
Payment	Name:	begins with	•		
 <u>EE Data - Entered in</u> 					
	Last Name:	begins with	Y		
- Approve Time Entry/No					
OTP – Approve One Time	Search	Clear Ba	asic Search 🚦 Sa	we Search Criteria	
Payments	10000000000000	<u>De</u>		No. Ocarett Officia	

EE Data – Current Appointment Search Page:

Step 6: Time Entry Data page displays

Earnings Code: (required)	SCK (Sick Leave)
Hours: (required)	3: Indicates employee took 3 hours of sick leave

Notes:

Enter leave hours taken as a positive #

Enter leave balance adjustments as either a positive # (increase accrual balance) or negative # (decrease accrual balance)

To add additional earnings code(s), click 🕒

🚽 Save)

Note:

In the Practice Area, there are no vacation and sick balances. Therefore, for this exercise and the entry of 3 hours sick leave, the system will, **upon saving**, convert the leave to a sick leave dock (SDK, -3.0 hours). For employees with adequate vacation and sick balances in HRMS Production, entries will not convert to docks.

Step 7:

Com	pare vou	r Time	Entrv	Data -	- EE (Current	Appoint	ment pa	age with	the one	shown	below:
									0			

Company: CU	University of Colora			MP1 Open		
Pay Group: MON	I Monthly Employee	Pay E	nd Date:	02/28/2007		
Employee TE Status Pay A Active Job Code: 1310 Employee TE Status Cancelled Approved Ready Processed						
Status:	-		Leave			
Rate: \$2	0.19 P	osition: 0067968	31 Sick:	Vac	ation:	
			<u>Cı</u>	<u>istomize Find Vie</u>	w All 📜 🛛 First	🕙 1 of 1 🕨 Last
<u>*Earnings</u> <u>Code</u>	Hours	Addi Amt	<u>Override R</u>	ate Speedtype	<u>Pay Amor</u>	<u>int</u>
1 SDK 🔍 8	ICK DOCK -3.00				Q	+ -
+ -						
Totals						
	2	00 \$0.0	nn		\$-65.	63

Note:

To access other employees when using a search list, use icons:

- **Q**Return to Search returns to the search page
- displays next employee in the list
- **(TEPrevious in List)** displays previous employee in the list

Step 8:

Without canceling out of the current page select: Batch Header

University _{of} Colorado		
Menu		HR89PRAC PRACT61 Home We
Search:		New W
 ▷ My Favorites ▷ Reports and Reviews ▷ Recruiting 	Company: CU University of Col	orado Batch ID: MP1
 Workforce Administration Compensation 	Pay Group: MON Monthly Employe	ee Batch Source: O Online
	Pay End Date: 02/28/2007	
- Batches - Batch Header - EE Data - Current	Created By: 187639	
Appointment – EE Data - Expired	Description:	Batch Totals
Appointment - EE Data - One Time Payment - EE Data - Entered in	PRA Test	EE Count: 1 Pay Amt: \$-65.63 Addl Amt: \$0.00 Hours: -3.00
<u>Batch</u> Approve Time Entry/No	Batch Status	Approved Totals
OTP – Approve One Time	Open Approved Cancelled Processed	EE Count: 0 Pay Amt: \$0.00
Payments ▷ Time Entry Reports	© Ready	Addi Amt: \$0.00 Hours: 0.00
 ▷ Find Batches ▷ Workforce Development ▷ Organizational Development 	Save Return to Search 🔄 Notify	E+AddUpdate/Display

Step 9:

On the Batch Header page, enter the following:

Batch Status:	Ready (Click the Ready radio button)
(required)	

Step 10:

Compare your Batch Header page with the one shown above.



Approve the Batch. (In the Practice Area, you are the approver. Depending on your security access in Production, you may or may not be an approver.)

Step 11:

Navigate to the **Approve Time Entry/No OTP** page using the left-hand navigation menu.

Time Entry Approve search page displays:

Universityof	
Colorado	HR89PRAC
Menu 🖃	
Search:	
▷ My Favorites	Approve Time Entry/No OTP
▷ Reports and Reviews ▷ Recruiting	Enter any information you have and click Search. Leave fields blank for a list of all values.
▷ Workforce Administration ▷ Compensation	Find an Existing Value
Time Collection	Pay Group: begins with 🗸 MON
⇒ Batches	
 Batch Header EE Data - Current 	Batch ID: begins with 💟 MP1
Appointment – EE Data - Expired	Reamh Clean
Appointment	Search Clear Basic Search 🗐 Save Search Criteria
 EE Data - One Time Payment 	
 <u>EE Data - Entered in</u> <u>Batch</u> 	
 Approve Time Entry/No OTP 	
- Approve One Time	
Payments	

Pay Group and Batch ID default

Step 12:

On the Approve Time Entry/No OTP page, enter the following:

TE Magnifying Glass: Q (optional)	Click on the magnifying glass (located next to the employee's name) to view <u>Employee Time Detail</u> entered for that employee
Approved By Checkbox:	Click on the Approved By Checkbox after confirming that
(required)	all EE data for your batch is recorded and accurate

(Emplo	yee Time Deta	i)					<u>New Wind</u>	<u>ow (</u>
	Emplit	: 189718	Meadov	vs,Mary		Rcd#:	0		
		,,			Custo	mize Find View Al	I I 🛗	First 🗹 1 of 1 🕨 Las	t
	Erned	Description	<u>Hours</u>	<u>Addi Amt</u>	Override Rate	<u>Override</u> Spdty/Acct	Pay	<u>/ Amount</u>	
	SDK	SICK DOCK	-3.00	\$0.00	41.666667			\$-125.000 + –]

Time Entry Approval:

ime Entry Approv	e								New Wind
		ersity of (thly Empl	Colorado		Descrij Pay Ene		b PRA /30/2007		
		Source:	201	Batc	h Status:	Ready	130/2007		
Batch Added By:	Miles, 10: Margaret L	3218		🗹 Appro	ved By:	Miles, Mar	garet L		
				<u>Customize</u> <u>F</u>	ind View	All j 🔠 🛛 F	irst 💽 1 of 1 🗈 L	ast	
E	Nam	<u>e</u>		Ë	Hours	Addi Amt	Pay Amount		
🔾 Meadows,Mar	У			0	-3.00	\$0.0	0 \$-125.00		
Batch Read	dy Totals:	1	Employees	8	3.00	\$0.00	\$-125.00		
Batch Appr	oved Totals:	0	Employees		0.00	\$0.00	\$0.00		

Notes:

A reminder that in this exercise, the PRA's sick leave was converted to a sick dock because there is no accrual balances for employees in the Practice Area.

After you have approved and saved your batch, the checkbox for each EE will change from unchecked to checked, indicating that each EE in this batch is approved.

Step 13: Click

Creating and approving a monthly time collection batch completed

Additional Notes:

<u>EE Data-Current Appointment</u>: A current appointment implies the employee status is Active and the Appointment End Date is later than the beginning date of the current pay period.

<u>EE Data-Expired Appointment</u>: The employee status is Terminated or On Leave and the Appointment End Date is prior to the beginning date of the current pay period.

Entering data: If you have only a few employees to enter into a batch, search by Employee ID # (EmplID). If you search by Name, Last Name, or % Sign, you must also enter your department number. If you enter time records for multiple departments, you can enter data for only one department at a time.

Active Appointments: If there is only one active empl rcd [employee record] within your row-level security for the employee, the system will take you directly to that record. If the employee has more than one active empl rcd within your row-level security, it will display all of them, and you must select the appropriate one for which you wish to enter leave.

SpeedType: This field is for <u>changing/overriding</u> (for the current pay period only) the SpeedType(s) recorded on the position's funding distribution page.

Override Rate: Use this field to enter hours at a different hourly rate to be paid (for the current pay period only). Offline authorization is required for use of the override rate field.

Exercise 5 – Recording and Approving Research Faculty Employee Termination

Scenario: The PRA's job appointment has ended. His/her last day to work is (**Your Choice**). Your goal is to record the termination.

Step 1. Navigation: Home; Workforce Administration; Job Information; Job Data; Find an Existing Value

University _{of} Colorado		HR89TE	ST T PPL Home Vivorklist Add to Favorites Sig
Menu 🖃			
Search: > My Favorites > > Reports and Reviews > > Recruiting > > Workforce Administration > > Job Information > > Job Information > > Workforce Reports >	Main Manu > Workforce Administration > Job Information Maintain information about a person tied to a specific Add Employment Instance Add Employment Instance or Add Hire/Rehire Row Job Data Transfer Rehire only	Job record <u>Job Data</u> Enter Job information including work location and compensation details.	Add or update <u>Contract Pay NA</u> Add or update contract pay details including payment type, term, and period.
Compensation Time Collection Workforce Development Organizational Development Enterprise Learning Orden USAP	Job Data Transfer/Rehire only	Maintain contracts or other written agreements with their employees and contractors Update Contract Pay NA	Inquiry pages and reports that show work information for a person Information summary Vork Study Job List
▷ Set Up HRMS ▷ Reporting Tools - <u>My Dictionary</u>	Company Property Enter the assignments of company property.	Contains reports based on Job data of the Organization. Employees on Leave of Absence Temporary Employees	

Step 2. Job Data search page displays

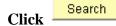
Enter one or more of the search fields

EmplID:	Enter the PRA's EmplID (You can also search by Name or					
(required)	Last Name)					

Compare your Job Data search page with the one shown above. Your page may differ from one shown here:

Universityof						
Colorado					HR89PRAC PRACT61 Home	Add to Favorites
Menu 🖃						
Search:						New Window
(»)						
▷ My Favorites	Job Data					
Reports and Reviews	Enter any informat	ion you have an	d click Search. Lea	ive fields blank for a list (of all values.	
Recruiting Workforce Administration						
Personal Information	∫ Find an Existing	Value				
✓ Job Information			1			
Contract Administration	EmpliD:	begins with 🛰	189348			
Review Job Information	Empl Rcd Nbr:	= 🗸				
Reports – Add Employment	Name:	begins with 🗸				
Instance	Last Name:	beains with 🗸				
- Job Data				0		
 Update Contract Pay NA Job Data Transfer/Rehire 	Department:	begins with 💊		Q		
only	Last 4 SSN:	begins with 💊	•			
- Job Approval	HR Status:	- ~		*		
Company Property Plan Salaries CU	Employee Status:	= 🗸		~		
Vorkforce Reports	🗹 Include Histor					
D Compensation	include fusion					
▷ Time Collection	Search	lear Basic	Search 📕 Save :	Paarah Ovitavia		
 Workforce Development Organizational Development 		Basica	bearchi (E) bave a	search Chiena		
Enterprise Learning						
▷ Reporting Tools						

Step 3:



Step 4:

On the Work Location page, enter the following:

Insert a Row: (required)	Click + to insert a row
Effective Date: (required)	Termination Date, which is first day employee no longer works for the university in this job
Action: (required)	Termination
Reason: (required)	END (End of Appointment)
Job Notes: (optional)	Record any comments relative to the termination

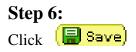
Note:

The effective date of the termination is the first day the employee no longer works for the university.

Example: If the last day to work is Friday, March 16, 2007, then the effective date of the termination is Saturday, March 17, 2007.

Step 5:

	r Work Loca	tion page with the o	ne shown below	W:		
University _{of} Colorad						
	10			HR89PRAC PRACT61	Home Worklist Add	to Favorites
,					New Window Cus	tomize Pac
Work Location	nformation Payroll	Compensation Employment	Information			
Save) QReturn to Sea	rch) (∔≣Ne×tin List) (†≣Pr	evious in List) 🗇 Refresh	🖉 Update/Display) (🖉 Include Hist	tany)		
Meadows, Mary	EMP	ID:	189348 Empl I	Rcd #: 0		
Work Location			Find View All F	irst 🔳 1 of 2 🕨 Last		
HR Status:	Inactive En	npl Status: Terminated		+ -		
'Effective Date:	06/01/2007 🗵 Se	equence: 👘 🗍 Job Notes				
Action / Reason:	Termination	END 🤍 End of Appo	intment			
				Future		
Last Date Worked:	05/31/2007					
Position Number:		Professional Research Asst	Position Entry Date:	06/01/2007		
Regulatory Region:	USA	United States	Position Data			
Company:	CU	University of Colorado	Appointment End Date:			
Business Unit:	UCOLO	University of Colorado				
Department:	20234	SOM-Adult Clinical Rsrch Cntr	Department Entry Date:	06/01/2007		
Location:	2UH	University Hospital				
Establishment ID:	CU	University of Colorado				
Last Updated by: PRA	CT61 PRACT61	Last Upd DtTm: 03/07/2	2007 12:01:18PM Date Crea	ited: 03/12/2007		
Save Return to Se	earch 🔄 Notify 🕞	Previous tab	///Update	Display Include His	story	
ork Location <u>Job Inform</u>	ation Payroll Compension	sation Employment Information				



Approve the Termination. (In the Practice Area, you are an approver. Depending on your security access in Production, you may or may not be an approver.)

Notes:

Certain Action/Reason combinations *do not require* Job Approval for the termination; the system automatically approves the action/reason.

For purposes of this exercise, let's assume that Termination/END requires Job Approval, even though it does not.

Step 7:

Navigate to **Job Approval** using the left hand navigation menu.

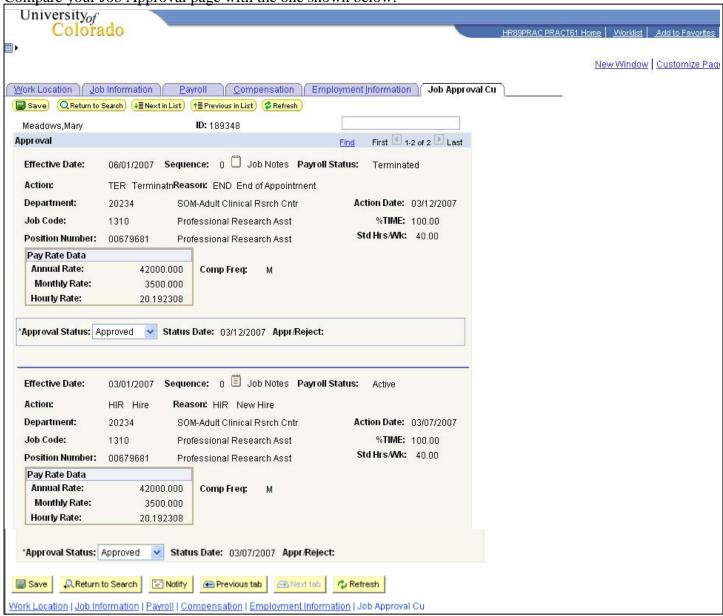
Step 8:

On the Job Approval page, enter the following:

Approval Status: (required)	Approved
Job Notes:	Approver may add to termination comments entered by
(optional)	end-user

Step 11:

Compare your Job Approval page with the one shown below:



Terminating the PRA completed

End of Life Cycle Exercise for a Research Faculty Employee