

# Colorado State University

## Human Resource Management System User Guide

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Unit 1: HRMS Basics

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Unit 2: DateTracking

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Unit 3: Hiring a New Employee

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Unit 4: Electronic Approvals

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### **Unit 5: Maintaining Existing Employees**

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Unit 6: Summer Session Appointments

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Unit 7: Labor Scheduling

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Unit 8: Time Entry and Timeclocks

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Unit 9: Performance Evaluation Module

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Unit 10: Leave Module

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Unit 11: User Reports

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Unit 12: Associates

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Appendix

## Unit 5: Maintaining Existing Employees

This unit provides instruction on:

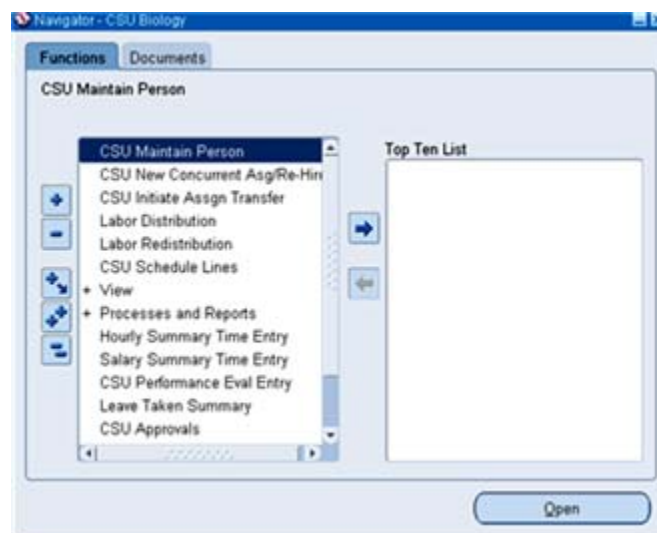
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## ***Updating a Mailing Address***

Never overwrite a home address. Never replace the Date From with another value on an existing address. Historical records must be maintained for tax purposes. To enter a new address for an employee, create a new record as described here.

- 1. From the Navigator window menu, open CSU Maintain Person.**

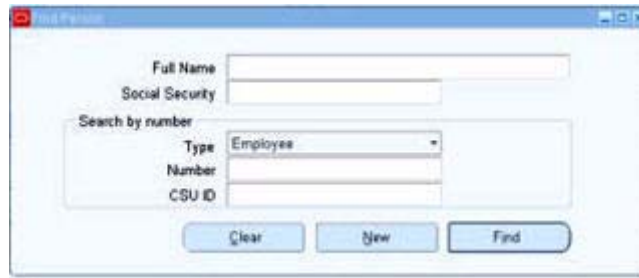


- 2. When asked if you want to change the effective date, click 'No'. You'll enter the**

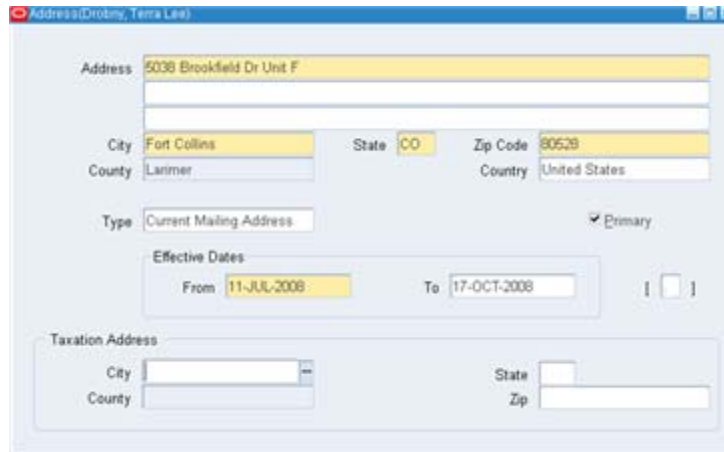
effective date of this change later.



3. When the Find Person window displays, enter the employee's last name, assignment number, or SSN and click 'Find'.



4. When the People window displays, click the Address button.
5. When the Address window opens, the current address will be displayed.
6. In the Date To field, enter the last day that this address is effective. Leave the Primary checkbox checked.



7. Press the down-arrow until you see a blank record.

The screenshot shows a web form titled "Address(Ellis, Evan)". It contains several input fields: "Address" (empty), "City" (empty), "State" (empty), "Zip Code" (empty), "County" (empty), and "Country" (set to "United States"). Below these is a "Type" field (empty) and a "Primary" checkbox (unchecked). An "Effective Dates" section has a "From" field with the value "24-MAY-2005" and a "To" field (empty). There are also navigation buttons at the bottom right.

8. Enter the new Address and Zip Code fields. The remaining fields will be populated for you.
9. In the Date From field, enter the day after the previous address ended.
10. Check the Primary box.
11. Save your work.

The screenshot shows the same "Address(Ellis, Evan)" form, but now populated with data. The "Address" field contains "55 E St.". The "City" field is "Fort Collins", "State" is "CO", "Zip Code" is "80523", and "County" is "Larimer". The "Country" remains "United States". The "Type" field is now "Current Mailing Address" and the "Primary" checkbox is checked. The "Effective Dates" section shows "From" as "02-JUL-2005" and "To" as empty. A "Taxation Address" section is visible at the bottom with empty fields for City, County, State, and Zip.

### ***Updating Directory Information***

Information entered here is used to populate the campus directory. The printed directory is published once a year near the beginning of the fall semester. The online directory is updated from data in the HR System a few times per week.

1. Scroll down to Directory Information.
2. Enter the employee's start date in the Start Date field.
3. Click the Detail field's LOV.

Print Address	No
Print Spouse	No
Spouse's Name	
Additional Work Title	
Additional Dept Number	
Additional Dept Name	
Additional Bldg Name	
Additional Office Phone	
Additional Room Num	
Mail Option	
Deans List	No
Directors List	No
Department Head List	No
Department Secretary List	No
Include Associate in Directory	No

#### 4. All fields are optional.

**Print Address** - Determines whether the employee's home address and phone number appear in the printed directory. The home address comes from the People -> Address screen.

**Print Spouse** - Determines whether the contents of the Spouse's Name field appears in the printed directory.

**Spouse's Name** - If Print Spouse is set to "Yes", the contents of this field will appear in the printed directory.

**Additional Work Title** - The contents of this field appear in both directories and is in addition to the employee's job class. This field should be used to identify an employee's second major function in the department or to further clarify the job class description as it appears on the assignment screen.

**Additional Dept Number** and **Additional Dept Name** - If the employee works closely with another department on campus, please select the department number from the LOV and enter the department name. The primary department number and name come from the employee's assignment screen.

**Additional Bldg Name** and **Additional Room Num** - If the employee has a second office, enter the building name and office number here. The employee's primary office information comes from the People screen -> Office Details tab.

**Mail Option** - If the employee's mail should be delivered to a campus delivery location other than that of his primary assignment, please choose a value from the LOV.

**Dean, Director, Department Head, and Department Secretary** - If any of these fields are "Yes", the employee will be included in the DDD listserv.

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## ***Changing the Primary Assignment/Department***

The primary assignment determines to which department an employee's pay advice will be mailed. In most cases, the HR System correctly determines the primary assignment based on a set of rules. Occasionally the choice is arbitrary, as when an employee has only two active student hourly assignments. In this case, the HR user may select the appropriate primary assignment.

On the other hand, if a department user selects an hourly assignment to be primary when an active salaried assignment exists, this change will be overwritten by Oracle. Therefore, while Oracle will allow you to make the change, it may at a later time determine that there is a different assignment which should be primary.

### **Non-Student Hourlies and Students**

To change a student or non-student hourly's primary assignment/department designation:

- 1. Open CSU Maintain Person and ensure that you are DateTracked to today's date.**
- 2. Use the Find screen to locate the employee.**
- 3. Click the Assignment button.**
- 4. Use the up- and down-arrows on your keyboard to select the assignment that should be primary.**
- 5. Click the Miscellaneous tab and then click in the Primary checkbox.**
- 6. Save your work and click 'Correction' when prompted.**

### **All Other Employee Types**

To change any other type of employee's primary assignment/department designation:

- 1. Print a Personnel File Data Form for the employee.**
- 2. Note the change on the form in the Comments section.**
- 3. Obtain signatures from the previous primary department and the new primary department.**
- 4. Forward the PFD to HR Records.**

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## ***Approval Routing for Assignment Changes***

Assignment changes follow the same approval routing as new hires, except for transfers which route through the **current** department's hierarchy, through the **new** department's hierarchy, and then to HRS. See Unit 3 for an outline of the hierarchy.

**Certification Forms**

A new Certification Form is required when any of the below assignment details are changed. If the change is made using the CSU Assignment Changes screen, a Certification Form will automatically be created for the employees as listed below.

**Faculty and Admin Professionals:**

Appointment End Date	Assignment Category
Salary	Department
Job	Salary Basis

**Graduate Assistants:**

Appointment End Date	Employee Qualifier
Salary	Department
FTE	

If you ever find it necessary to run a Certification Form outside of an assignment change, please follow the instructions below.

- 1. Open Processes and Reports and select the correct report (the Acad Fac/Admin Pro Cert Form or the Grad Asst Appt/Cert Form).**



- 2. Enter the effective date of the change in the Date field.**
- 3. Search for the employee using either of the fields in the Step 2 block.**
- 4. Tab to the Assignment No. field and enter the assignment number for which you submitted a change.**



5. When printing a Certification Form for an assignment change, the Item Key field is required. Press ctrl-L to have the HR System select the correct Item Key for you.

When printing a Certification Form to display the current information in Oracle HR, the Item Key should be left blank.

6. The fields in Step 4 of the Graduate Assistant Certification Form are optional.
7. Click 'Run Report'. The Certification Form will open automatically in Adobe Acrobat.

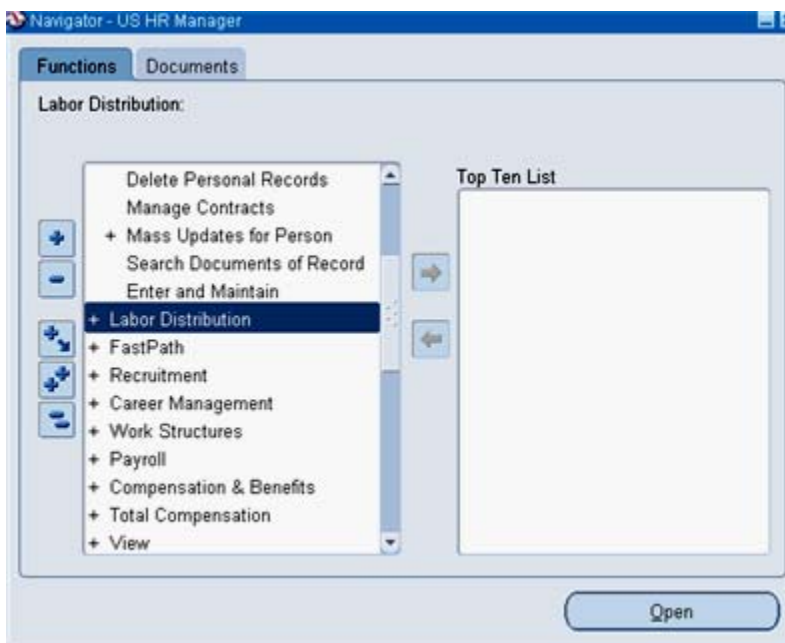
## Updating Employee Funding

Employee funding may be changed at any time and does not require approval. Management reports will reflect these changes the next time encumbrances are sent to FRS. This occurs nightly except while salary payroll is running.

If an account is changed after payroll has begun processing (according to the schedule posted at <http://www.hrs.colostate.edu/payroll/index.html>), the new account should be started on the first of the following month. If necessary, a redistribution for the current month may be created at the beginning of the next month.

Once a line of funding has been entered and paid from, please do not edit the line. If the funding changes, end date the line and create a new one. Keeping history in this manner can help Human Resources determine the source of a funding problem, should one arise.

1. From the Navigator screen, open Labor Distribution.



2. Click the Flashlight icon on the Toolbar to open the Find screen.



3. Use the Full Name or Employee No. field to search for the employee. Click 'Find'.

4. In the lower half of the screen, select the assignment whose funding is to be changed. Click the Schedule Lines button.

Assignment No.	Job	Position	Begin	End	FTE	Assignment Status	Org. Def.	Element Group	Element
5441	007450_Assoc		01-JUL-2001			Terminate Ass	<input type="checkbox"/>	<input type="checkbox"/>	
							<input type="checkbox"/>	<input type="checkbox"/>	
							<input type="checkbox"/>	<input type="checkbox"/>	
							<input type="checkbox"/>	<input type="checkbox"/>	

5. Make the necessary changes on the Schedule Lines screen.

**Employee**  
 Full Name: Alexander, Roger T  
 Employee No.: 5441

**Assignment**  
 Assignment: 5441 FTE:   
 Org.: Computer Science Payroll: Calendar Month  
 Begin: 01-JUL-2001 End:   
 Status: Terminate Assgn - Payroll O

**Schedule Hierarchy**  
 Assignment   
 Element Group   
 Element Type

GL Account	Project	Start Date	End Date	%
133862		01-SEP-2002		100

Default Account:     
 Totals:

6. For instance, to begin splitting this employee’s pay between the existing account and one other account starting in June 2006, the screen should include the following information.

**Employee**  
 Full Name: Schauble, Carolyn JC  
 Employee No.: 5431

**Assignment**  
 Assignment: 5431-4 FTE:   
 Org.:  Payroll: Calendar Month  
 Begin: 16-MAY-2003 End:   
 Status: End Summer Session

**Schedule Hierarchy**  
 Assignment   
 Element Group   
 Element Type

GL Account	Project	Start Date	End Date	%
537104		16-MAY-2003		100
537085		20-OCT-2008		50
537358		20-OCT-2008		50

Default Account:     
 Totals:

7. After you click ‘Refresh Display’, the grid on the right of the screen will populate with summary information.

8. Save your work.

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## Changing an Employee Group

To change an employee's Group (ie, from Graduate Student to Faculty), you must create a new concurrent assignment according to the instructions in this unit under the section titled Creating a New Concurrent Assignment.

If the employee will no longer be employed under the old Employee Group, terminate the old assignment according to the instructions also found in this unit under the section titled Initiating Assignment Termination, Retirement, or Emeritus.

If the employee's assignment is a student job but the employee is no longer a student, the student job must be suspended (not terminated) before a new concurrent can be created.

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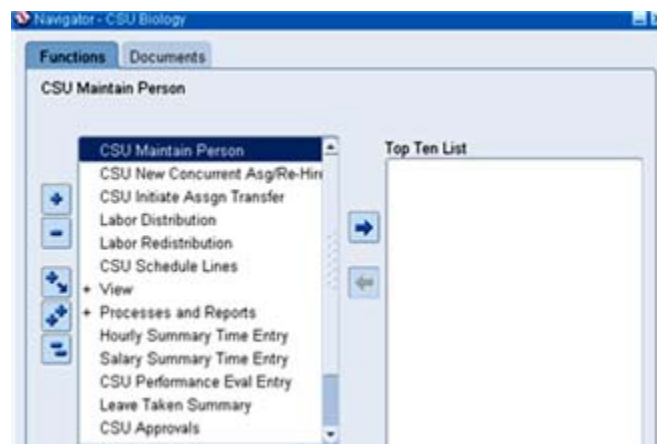
## Assignment Changes

Use the CSU Assignment Changes screen to make changes to an employee's assignment.

### Notes:

- If the action includes an Employee Group change, the old assignment must be terminated and a new assignment created. This section will help you with the termination. You can also refer to the section on Creating a New Concurrent Assignment later in this unit.
- If the action includes a qualifier change for a graduate assistant (i.e., from GRA to GSA), this change must be made on the first of a month.
- Additional information is provided for the following situations. Please refer to the table of contents at the beginning of this unit for page numbers.
  - Leave without pay, sabbatical, and transitional statuses
  - Initiating assignment termination, retirement, or emeritus
  - Transferring an assignment

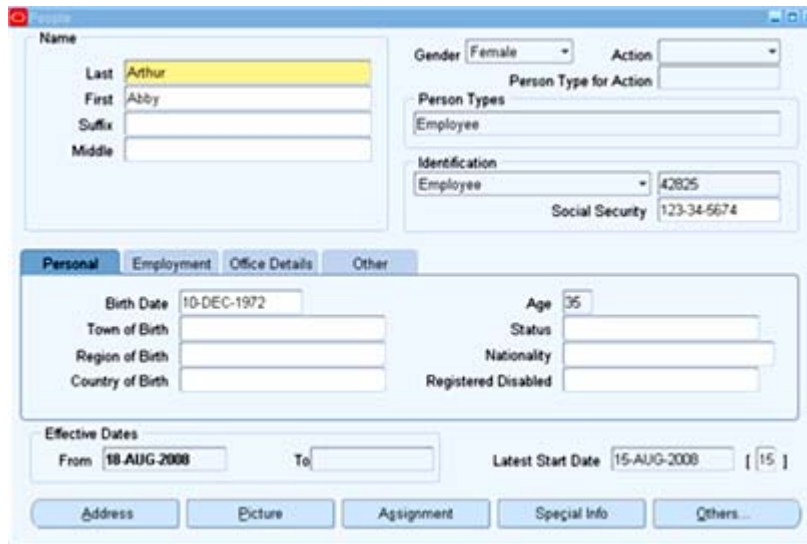
### 1. From the Navigator menu, open CSU Maintain Person.



- When asked if you want to change the effective date, click 'No'. You'll enter the effective date of this change later.



- In the Find Person window enter the employee's last name, SSN, or employee number and click 'Find'.
- On the People screen, click the Assignment button.



- Select the assignment you wish to change. If the employee has more than one assignment, use the up- and down-arrows to scroll through them.
- Place your cursor in any field except the Working Hours field. Click the Zoom button on the toolbar to open the CSU Assignment Changes window.



7. Enter the Effective Date and press the Tab key. Fields relevant to this assignment will populate with the current information.

Effective Date: 22-OCT-2008      40965 Bala, Peter

Organization: University Parking Services      6012      Location: 201 Green Hall

People Group: Student      Qualifier: Non-Work Study

Job: 999160      STU Pkg Monitor/Clerk I      Grade: S 249 ASR

Position:      Employment Category: Temporary

Basis of Service:      Appointment End:      Current Salary: \$8.62

Status: Active Assignment      Hours per week: 0      Minimum: \$8.21

New Salary:      Maximum: \$10.05

Change Reason:      Conditions of Appointment:      Creator Comments:

Funding	Account	Description	Start Date	End Date	Percent
Update	260800	UNIVERSITY PARKING SERVICES	06 MAR 2008		100.00

Send into Approval Process

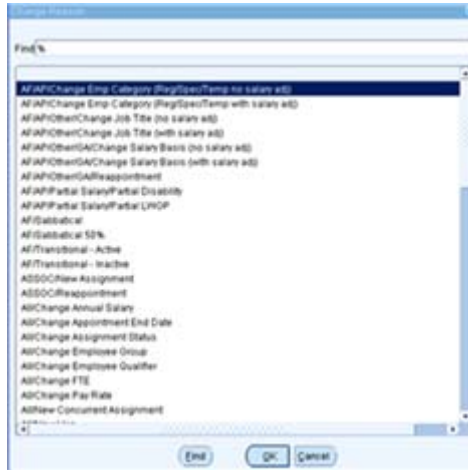
8. The Qualifier may be changed for Graduate Assistants only and this must be done on the first of a month. Mid-month qualifier changes are not permitted.
9. If this employee has a new position number, delete the Job field and enter this number in the Position field. Skip to Step 10.

If this employee does not have a position number, in the Job field, enter the new Job Class or use the LOV to display the list of values. The new job appears on the Assignment Changes Form with an asterisk next to it to indicate that a change has been made.

To search for the new job, open the LOV. After the % sign in the Find field, type part of the Job Title or Job Code followed by another % sign. Click 'Find' to display a narrowed list. Double-click the correct job.

Number	Name
999010	Stu Laboratory Support
999011	Stu HCS Trainee II
999012	STU HCS Trainee III
999020	STU Night Duty Technician
999030	STU Staff Assistant
999040	STU Residence Hall Staff
999060	STU Livestock Mgmt Intern
999070	STU Art Model
999080	STU Tutor
999090	Stu Literacy/Math Tutor
999102	STU Dining Services I
999103	STU Dining Services II
999104	STU Dining Services III
999105	STU IT Tech I
999106	STU IT Tech II
999107	Stu Dining Services IV
999110	STU Writer/Broadcaster

- 10. If changing the salary and/or FTE, edit the New Salary and/or Working Hours fields.
- 11. A Change Reason is required for all salaried employees. Use the LOV to choose the appropriate change reason.



- 12. The CSU Assignment Changes screen displays an asterisk beside all fields that have been changed.

A screenshot of the 'CSU Assignment Changes' screen for employee Lisa Ann Knebl (ID 15430). The screen shows various fields for assignment details. The 'Effective Date' is 28-OCT-2008. The 'Organization' is Computer Science (1873) and the 'Location' is 211 University Services Center. The 'People Group' is Admin Professional and the 'Qualifier' is Non-Federal. The 'Job' is 009294 Research Associate I and the 'Grade' is empty. The 'Position' is empty and the 'Employment Category' is Temporary. The 'Basis of Service' is 12 Month and the 'Appointment End' is 30-JUN-2009. The 'Status' is Active Assignment and the 'Hours per week' is 26.4. The 'New Salary' field is empty. The 'Change Reason' field is empty. The 'Conditions of Appointment' and 'Creator Comments' fields are also empty. On the right side, there is a 'Current Salary' section with fields for Date (01-JUL-2008), Amount (\$42,600.00), Minimum, and Maximum. At the bottom, there is a table for 'Funding' with columns for Account, Description, Start Date, End Date, and Percent. The table contains two rows: 133862 COMPUTER SCIENCE (01-DEC-2006 to empty, 100.00) and 167740 RA/RSP COMPUTER SCIENCE (01-JAN-2005 to 30-NOV-2006, 100.00). There is an 'Update' button next to the table and a 'Send into Approval Process' button at the bottom.

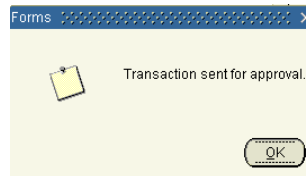
Account	Description	Start Date	End Date	Percent
133862	COMPUTER SCIENCE	01-DEC-2006		100.00
167740	RA/RSP COMPUTER SCIENCE	01-JAN-2005	30-NOV-2006	100.00

13. In the Creator Comments field (required for all salaried employees), enter 'Promotion' or 'Demotion' in addition to any other relevant information.

For promotions within the Researcher series, please include justification for the promotion.

For off-cycle Faculty and Administrative Professional salary increases, note if and when EBC or OEO approval was granted.

14. Review the funding at the bottom of the screen. If changes need to be made, click the Update button.
15. When the Labor Scheduling window opens, select the appropriate assignment, then click Schedule Lines.
16. On the Schedule Lines screen, end date any funding lines that need to be changed and create new funding lines with the correct information.
17. Save your work. Close the Schedule Lines and Labor Scheduling screens to return to the Assignment Changes Form.
18. After reviewing the changes, you may print this window by selecting File -> Print or by clicking the Print icon.
19. Click 'Send into Approval Process'.
20. When the following window opens, click 'OK'.



21. Close the CSU Assignment Changes screen.
22. If this change is for a faculty, admin professional, or graduate assistant, the Certification Form will be displayed automatically. Please refer to the Certification Form section earlier in this unit.

When a change to an employee's assignment is awaiting approval, no other changes can be made to the record until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.



### **Faculty-Specific Situations**

#### **Promotions and Tenure Changes**

The University President approves academic faculty promotions and tenure recommendations. HR Records makes the appropriate changes to the job in the Assignment window for promotions, changes the Tenure Status and the Tenure Date in the Special Information window for tenured faculty, and changes version positions when necessary.

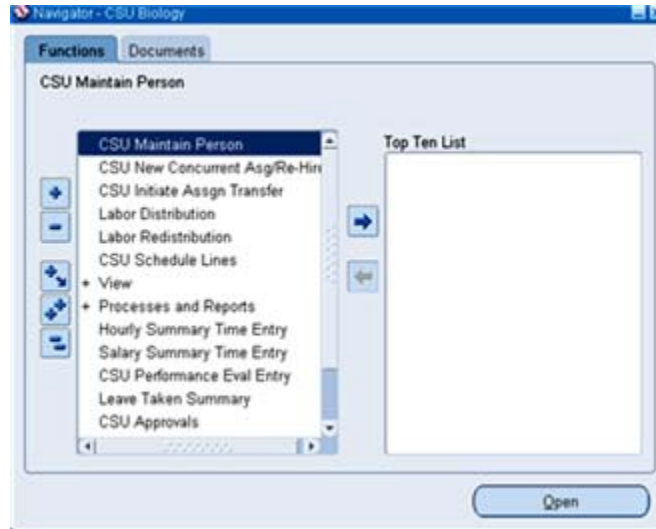
#### **Non-Tenured Regular Faculty not being Reappointed**

Initiate an assignment termination through the usual termination process in the CSU Assignment Changes screen for non-tenured regular faculty who are not being reappointed.

**Entering Leave Without Pay**

Before LWOP can be granted for faculty or admin professionals who work for departments reporting to the Provost, the Request for Leave Form (found on the Provost’s website) must be completed. LWOP for all other employee types, except State Classified, can only be granted for reasons defined by the Family Medical Leave Act or for Short Term Disability.

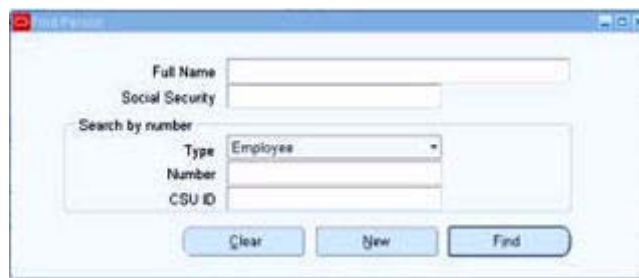
1. From the Navigator menu, open CSU Maintain Person.



2. When asked if you want to change the effective date, click 'No'. You will indicate the effective date of the change later.



3. In the Find Person window enter the employee’s last name, employee number, or SSN and click 'Find'.



- From the People screen, click the Assignment button.

The screenshot shows a web-based form for entering employee information. The 'Name' section includes fields for Last (Arthur), First (Abby), Suffix, and Middle. The 'Gender' is set to Female. The 'Person Types' section lists 'Employee'. The 'Identification' section shows 'Employee' and 'Social Security' 123-34-5674. The 'Personal' tab is active, showing 'Birth Date' as 10-DEC-1972 and 'Age' as 35. There are also fields for Town of Birth, Region of Birth, Country of Birth, Status, Nationality, and Registered Disabled. The 'Effective Dates' section shows 'From' as 18-AUG-2008 and 'Latest Start Date' as 15-AUG-2008. At the bottom, there are buttons for Address, Picture, Assignment, Special Info, and Others.

- Select the assignment you wish to change. If the employee has more than one assignment, use the up- and down-arrows to scroll through them.
- Place your cursor in any field, except the Working Hours field. Click the Zoom button to access the CSU Assignment Changes screen.



- Enter the Effective Date (start date) of the Leave Without Pay and press Tab. Fields relevant to this assignment will populate with the current information.

The screenshot shows the 'CSU Assignment Changes' screen. The 'Effective Date' is 22-OCT-2008. The employee is identified as 40965 Bala, Peter. The 'Organization' is University Parking Services (6012) at Location 201 Green Hall. The 'People Group' is Student, 'Job' is 999160 STU Pkg Monitor/Clerk I, and 'Grade' is S.249.ASR. The 'Employment Category' is Temporary. The 'Basis of Service' is Active Assignment. The 'Current Salary' section shows a date of 05-JUL-2008, an amount of \$9.62, a minimum of \$8.21, and a maximum of \$10.05. There are fields for Appointment End, Hours per week, and New Salary. A 'Change Reason' field is also present. At the bottom, there is a table for funding information:

Funding	Account	Description	Start Date	End Date	Percent
	260800	UNIVERSITY PARKING SERVICES	06 MAR 2008		100.00

Buttons for 'Update' and 'Send into Approval Process' are visible at the bottom.

8. State Classified employees - Do not change the Status; Payroll will change it as needed.

Faculty and admin professional employees - Change the Status to Leave Without Pay regardless of the duration.

9. Click in the Change Reason field and use the LOV to select the appropriate change reason starting with “LWOP”. Click ‘OK’.
10. In the Creator Comments field, enter information regarding the unpaid absence:

**Hours on LWOP**

**LWOP Change Reason**

**LWOP Start Date and Time**

**LWOP End Date - An End Date is required, except in the case of administrative leave without pay. Please give an approximation if the date is unknown.**

- Employee will take 24 hours of LWOP/Administrative beginning on 5-23-05, ending on 5-25-05. Full-time employee.
- Employee will take 11.50 hours of LWOP/Departmental beginning on 5-23-05, ending on 7-25-05 at 11:30 AM. Half-time employee.
- Employee will take 1.27 hours of LWOP/Education on 5-23-05 beginning at 8:00 AM, ending at 9:16 AM. Full-time employee.
- Employee will be on LWOP/Administrative beginning on 5-23-05. Approximate return date 6-10-05. Full-time employee.

Effective Date: 22-OCT-2008      40965 Bala, Peter

Organization: University Parking Services      6012      Location: 201 Green Hall

People Group: Student      Qualifier: Non-Work Study      Current Salary Date: 05-JUL-2008

Job: 999160      STU Pkg Monitor/Clerk I      Grade: S 249 ASR      Amount: \$8.62

Position:      Employment Category: Temporary      Minimum: \$8.21

Basis of Service:      Appointment End:      Maximum: \$10.05

Status: Active Assignment      Hours per week: 0      New Salary:      Change Reason:

Conditions of Appointment:

Creator Comments:

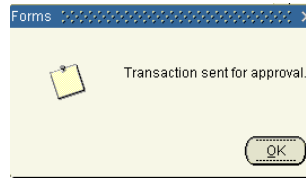
Funding	Account	Description	Start Date	End Date	Percent
	260800	UNIVERSITY PARKING SERVICES	06-MAR-2008		100.00

Update      Send into Approval Process

11. After reviewing the changes, you can print this window by selecting File -> Print.

12. Click ‘Send into Approval Process’ to submit the changes for approval.

13. When the following window appears, click 'OK'.



14. Close the CSU Assignment Changes screen.

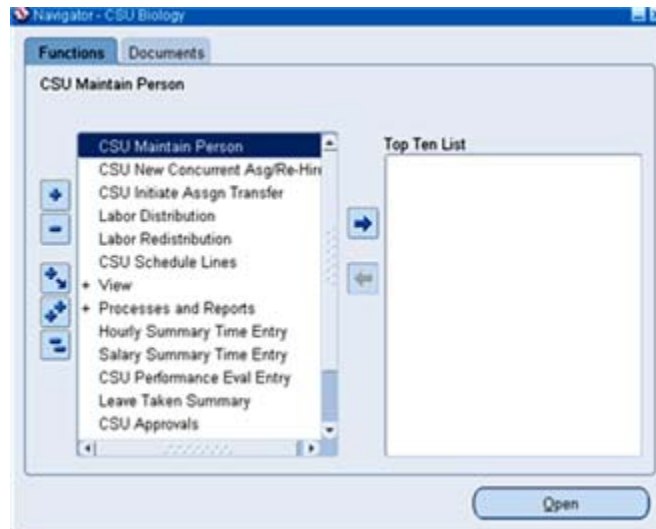
When a change to an employee's assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.

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## ***Sabbatical Status (Faculty Only)***

Sabbaticals must be approved by the employee's organization under the current process (Provost Office to Board of Governors for approval each December) before being entered in Oracle.

1. From the Navigator menu, open CSU Maintain Person.



- When asked if you want to change the effective date, click 'No'. You'll enter the effective date of this change later.



- In the Find Person window, enter the employee's last name, employee number, or SSN and click 'Find'.

- From the People screen, click the Assignment button.

- Select the correct assignment using the up- and down-arrows, if the employee has more than one assignment.
- Place your cursor in any field, except the Working Hours fields, and click the Zoom button to access the CSU Assignment Changes screen.



7. Enter the effective date and press the tab key. Fields relevant to this assignment will populate with the current information.
8. In the Status field, type 'Sab' and press Tab. Choose from the two Sabbatical options:
  - Sabbatical 50% (half sabbatical) means that a 9-month employee receives 50% pay for two semesters and a 12-month employee receives 50% pay for 12 months.
  - Sabbatical (full sabbatical) means that a 9-month employee receives 100% pay for one semester and a 12-month employee receives 100% pay for six months.

Effective Date: 01-MAR-2007 6737-3 Arthur, Abby

Organization: Academic Advancement Center 8100 Location: 117 Gibbons Hall

People Group: Faculty Qualifier: Non-Federal Current Salary Date: 01-JUL-2004 Amount: \$33,924.00

Job: 008070 General Auditor Grade: Employment Category: Regular

Position: Basis of Service: 12 Month Appointment End: Hours per week: 40

Status: sab New Salary:

Change Reason: Find: sabbatical%

Assignment Status: Sabbatical

Creator Comments: Sabbatical 50%

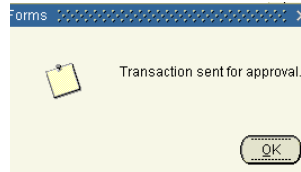
Date	End Date	Percent
N-2004		100.00

Update Send into Approval Process

9. For employees changing to Sabbatical 50% status, reduce the Hours per Week field to half its current value.
10. Click in the Change Reason field and use the LOV to select the appropriate reason: AF/Sabbatical for full sabbatical or AF/Sabbatical 50% for half sabbatical.
11. In the Creator Comments field, enter information regarding the employee's change to Sabbatical status including the beginning and end dates.
 

For employees who are on 50% Sabbatical but are being paid 100%, state in Creator Comments that the employee has research funds which pay the other half. Additionally, the Working Hours should be set to 40.
12. Review the funding at the bottom of the screen. If changes need to be made, click the Update button.
13. When the Labor Scheduling window opens, select the appropriate assignment, then click 'Schedule Lines'.
14. On the Schedule Lines screen, end date any funding lines that need to be changed and create new funding lines with the correct information.

15. **Save your work. Close the Schedule Lines and Labor Scheduling screens to return to the Assignment Changes Form.**
16. **After reviewing the changes, you may print this window by selecting File -> Print.**
17. **Click ‘Send into Approval Process’ to submit the changes for approval.**
18. **Click ‘OK’ when the following window opens.**



19. **Close the CSU Assignment Changes screen.**

When a change to an employee’s assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message “Assignment has active workflow” will appear.

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## ***Transitional Status (Faculty Only)***

Faculty Transitionals must be approved by the employee’s organization under the current process (Provost Office to University President for approval) before entering the action into Oracle. Although the Oracle process takes the place of the Faculty Transitional Appointment Form, the Request for Transitional Appointment Form must still be forwarded to HRS.

Faculty Transitionals will be paid using the same 9- and 12-month pay dates as Regular Faculty. (They cannot be on 9/12 pay and must notify HR Records to cancel if they are set up this way.) Transitionals are limited to a 4-year appointment, then they must retire. They pay into a Defined Contribution Plan.

The following instructions are for DCP-enrolled employees only. If the employee is currently enrolled in PERA, please contact Records at (970) 491-4976 for other instructions.

1. **From the Navigator menu, open CSU Maintain Person.**
2. **When asked if you want to change the effective date, click ‘No’. You will enter the effective date of the change later.**





3. In the Find Person window enter the employee's last name, employee number, CSU ID, or SSN and click 'Find'.
4. From the People screen, click the Assignment button.

5. Select the correct assignment using the up- and down-arrows, if the employee has more than one assignment.
6. Place your cursor in any field, except the Working Hours field, and click the Zoom button to access the CSU Assignment Changes screen.



7. Enter the effective date and press the tab key. Fields relevant to this assignment will populate with the current information.
8. Enter the new Appointment End Date.
9. In the Status field, type 'Trans' and press Tab. Choose from the two Transitional options:
  - **Transitional - Inactive** is used during the period when the Faculty Transitional is not on regular pay, such as fall semester for a Faculty Transitional that is paid only in the spring. This status allows for other pay elements such as Ben Pay and the PERA add-on, but will stop regular salary payment.

- **Transitional - Active** is used during the period when the Faculty Transitional is on regular pay.

- 10. Ensure that the Hours per week field is correct.**
- 11. Click in the Change Reason field and use the LOV to select the appropriate reason: AF/Transitional - Active or AF/Transitional - Inactive.**
- 12. In the Creator Comments field, enter information regarding the employee's change to Transitional status including start and end dates and include sick and annual leave balances.**

CSU Assignment Changes (6737-3 - Arthur, Abby)

Effective Date: 01-MAR-2007      6737-3 Arthur, Abby

Organization: Academic Advancement Center      8100      Location: 117 Gibbons Hall

People Group: Faculty      Qualifier: Non-Federal      Current Salary Date: 01-JUL-2004

Job: 008070      General Auditor      Grade:      Amount: \$33,924.00

Position:      Employment Category: Regular      Minimum:      Maximum:      New Salary:     

Basis of Service: 12 Month      Appointment End:     

Status: \*Transitional - Active      Hours per week: 40

Change Reason: AF/Transitional - Active

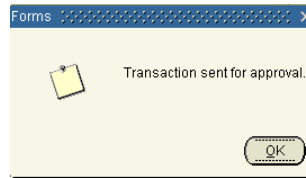
Conditions of Appointment:

Creator Comments: Arthur will be Transitional - Active from Aug 16, 2007, through Dec 31, 2005.

Funding:	Account	Description	Start Date	End Date	Percent
	130321	ECOLOGIST-ECOLOGY PROGRAM	29-JUN-2004		100.00

Update      Send into Approval Process

- 13. Review the funding at the bottom of the screen. If changes need to be made, click the Update button.**
  - When the Labor Scheduling window opens, select the appropriate assignment, then click 'Schedule Lines'.
  - On the Schedule Lines screen, end date any funding lines that need to be changed and create new funding lines with the correct information.
  - Save your work. Close the Schedule Lines and Labor Scheduling screens to return to the Assignment Changes Form.
- 14. After reviewing the changes, you may print this window by selecting File -> Print.**
- 15. Click 'Send into Approval Process' to submit the changes for approval.**
- 16. Click 'OK' when the following window appears.**



**17. Close the CSU Assignment Changes screen.**

When a change to an employee's assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.

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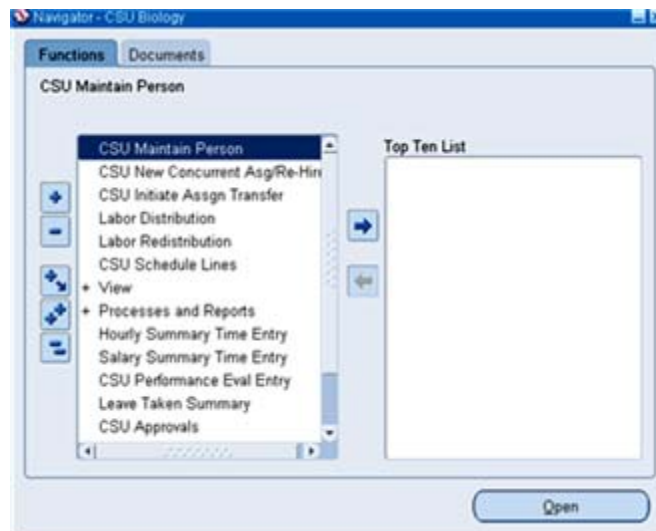
## ***Initiating Assignment Termination, Retirement, or Emeritus***

All assignments, except for student jobs, should be terminated when employment ends. If a student no longer works for your department, simply stop submitting hours for that student. Do not process an assignment termination.

To prevent a student from appearing on your summary time batches, end-date his funding in Labor Distribution. Students will be terminated when appropriate by Student Employment.

When terminating an employee, verify his address and phone number in Oracle so that the W-2 can be mailed correctly. Please refer to the section earlier in this unit entitled Updating an Employee Address.

**1. From the Navigator menu, open CSU Maintain Person.**



2. When asked if you want to change the effective date, click 'No'. You'll enter the effective date of this change later.
3. In the Find Person window enter the employee's last name, employee number, CSU ID, or SSN and click 'Find'.
4. Click the Address button at the bottom of the screen. Ensure that the employee will be receiving mail (such as his W-2) at this address following the termination.
5. From the People screen, click the Assignment button.
6. Select the correct assignment using the up- and down-arrows, if the employee has more than one assignment.

The screenshot shows a web-based form titled "Assignment: 01-JUH-2005(Dale, Dorothy D)". The form is divided into several sections:

- Organization:** Academic Advancement Center
- Group:** Non-Student Hourly,Non-Federal
- Job:** D6A1TX.Electrical Trades I
- Position:**
- Grade:** D.044.LTC
- Payroll:** CSU Bi-Weekly Payroll
- Location:** GIBNS 117
- Status:** Active Assignment
- Assignment Number:** 23005
- Assignment Category:** Temporary

Below these fields are tabs for "Salary Information", "Supervisor", "Standard Conditions", "Statutory Information", and "Miscellaneous". The "Salary Information" tab is active, showing:

- Salary Basis:** Non-Student Hourly
- Review Salary:** Every [ ] [ ]
- Review Performance:** Every [ ] [ ]
- Effective Dates:** From 11-APR-2005 To [ ] [ ]

At the bottom of the form are buttons for "Salary", "Entries", "Entry History", and "Statement of Earni...".

7. Place your cursor in any field except the Working Hours field. Click the Zoom button to access the CSU Assignment Changes screen.



8. The Effective Date of the change must be entered before any other fields can be accessed.

The effective date of a termination, retirement, or emeritus should be the employee's first day in the new status. In other words, use the day after the employee's last working day.

After entering the effective date and pressing Tab, fields relevant to this assignment will populate with the assignment information based on the effective date.

CSU Assignment Changes (6737-2 - Dale, Dorothy)

Effective Date: 01-MAR-2007 6737-2 Dale, Dorothy

Organization: Academic Advancement Center 8100 Location: 117 Gibbons Hall

People Group: Non-Student Hourly Qualifier: Non-Federal

Job: D6A1TX Electrical Trades I Grade: D.044.LTC

Position: Employment Category: Temporary

Basis of Service: Appointment End: 30-JUN-2004

Status: Active Assignment Hours per week: 0

Change Reason:

Conditions of Appointment:

Creator Comments:

New Salary:

Current Salary Date	Amount	Minimum	Maximum
10-JUL-2004	\$16.31	\$17.38	\$24.47

Funding Account	Description	Start Date	End Date	Percent
135522	HUMAN RESOURCE SERVICES	17-MAY-2004		100.00

Update

Send into Approval Process

9. If the Appointment End field has a value in it, change this to the last working day for the employee (ie, the day before the effective date).
10. Change the Status field to the appropriate value: Initiate Assgn Termination, Initiate Emeritus, or Initiate Retirement.

11. The Change Reason field is required for salaried employees and is requested for non-student hourlies. Use the LOV to select an appropriate reason which begins with TERM.

Effective Date: 01-MAR-2007 6737-2 Dale, Dorothy

Organization: Academic Advancement Center 8100 Location: 117 Gibbons Hall

People Group: Non-Student Hourly Qualifier: Non-Federal Current Salary Date: 10-JUL-2004 Amount: \$16.31

Job: D6A1TX Electrical Trades I Grade: D.044.LTC Employment Category: Temporary

\*Position: Appointment End: 28-FEB-2007 Minimum: \$17.38

Basis of Service: \*Status: Initiate Assgn Termination Hours per week: 0 New Salary: Maximum: \$24.47

Change Reason: TERM/Enter Own Business

Conditions of Appointment:

Creator Comments:

Funding:	Account	Description	Start Date	End Date	Percent
	135522	HUMAN RESOURCE SERVICES	17-MAY-2004		100.00
Update					

Send into Approval Process

12. In the Creator Comments field, enter the employee's sick and/or annual leave balances in hours.

For State Classified employees, include the sick leave and annual leave cap. For those hired after June 30, 1988, the sick leave cap is 360 hours. However, for those hired prior to that date, 360 plus the sick leave balance as of June 30, 1988, equals the sick leave cap.

For all faculty and admin professional terminations, you must include a statement regarding whether the termination is voluntary or involuntary.

13. After reviewing the changes, you can print this window by selecting File -> Print.
14. Click 'Send into Approval Process' to submit the changes for approval.
15. When the following Forms window appears, click 'OK'.



16. Close the CSU Assignment Changes Form.

When a change to an employee's assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.

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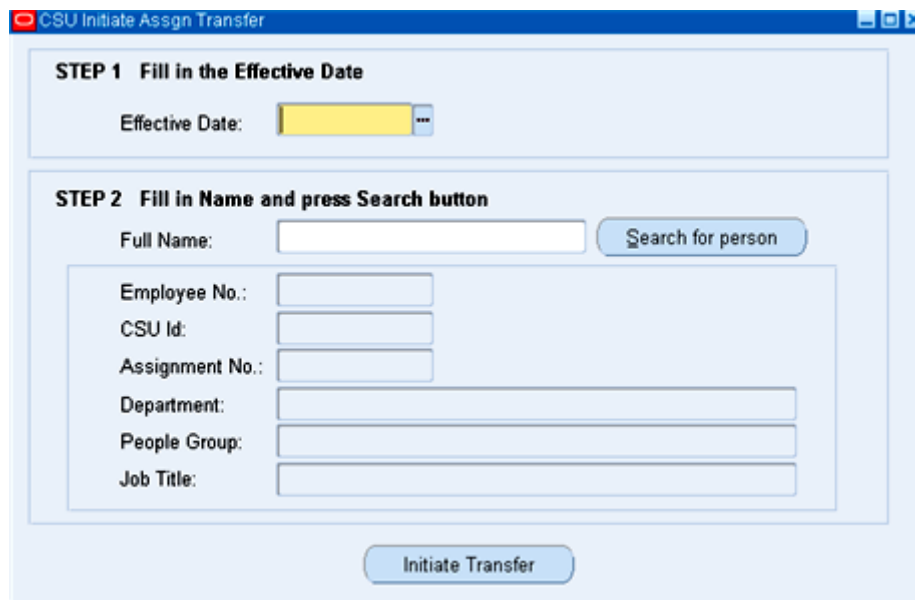
## ***Transferring an Employee into Your Organization***

To transfer an employee from one Colorado State University department into your department, use the CSU Initiate Assgn Transfer screen located on the Oracle HR navigator screen. This applies to employees whose People Group (State Classified, Non-Student Hourly, etc.) will remain the same.

If the employee's group will change (ie, from State Classified to Admin Professional), please refer to the relevant sections in this unit for instructions: Initiating Assignment Termination (for terminating the job for the old employee group) and Creating a New Concurrent Assignment (for creating a new job in the new employee group).

To transfer a work-study student employee to or from an off-campus organization, please contact Student Employment with the following information: effective date, job title, pay rate, and department name.

### **1. From the Navigator menu, open CSU Initiate Assgn Transfer.**



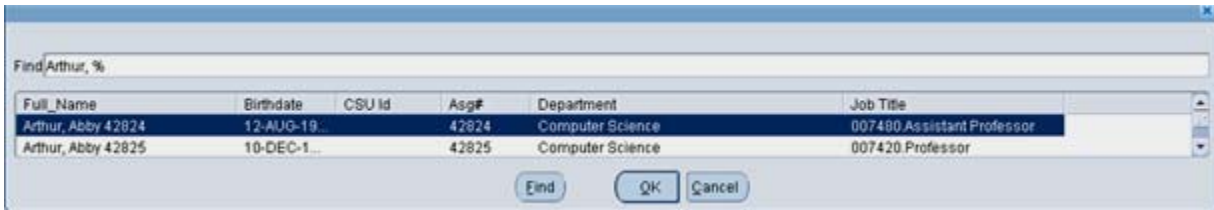
The screenshot shows a web browser window titled "CSU Initiate Assgn Transfer". The interface is divided into two main steps:

- STEP 1 Fill in the Effective Date**: A text input field labeled "Effective Date:" with a yellow background and a calendar icon.
- STEP 2 Fill in Name and press Search button**: A "Search for person" button next to a "Full Name:" input field. Below this is a group box containing several input fields: "Employee No.:", "CSU Id:", "Assignment No.:", "Department:", "People Group:", and "Job Title:". At the bottom of the screen is an "Initiate Transfer" button.

### **2. Enter the Effective Date of the transfer in Step 1.**

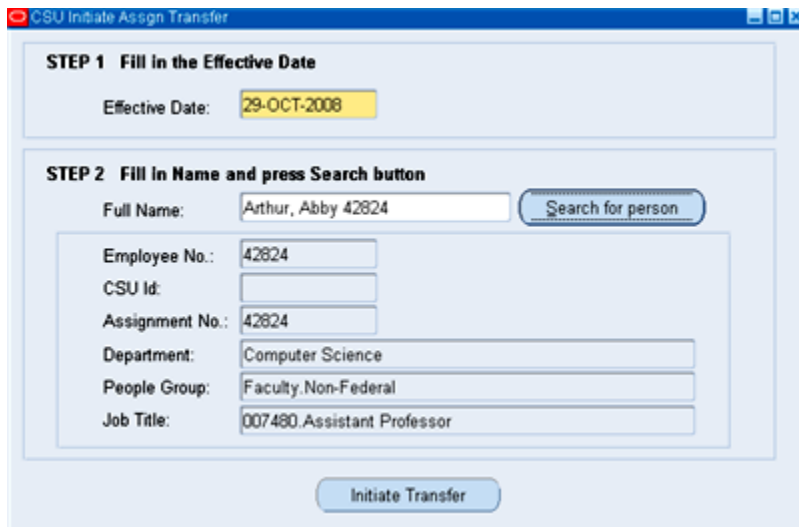
### **3. In Step 2, enter the employee's last name and press Tab or click 'Search for Person'.**

4. You may be required to choose the correct assignment from a list of values.



5. When the rest of the fields populate, confirm that the correct employee was chosen.

If not, re-enter the employee’s last name in the Full Name field and try again.





6. Click 'Initiate Transfer' to open the CSU Assignment Changes screen.

CSU Assignment Changes (42824 - Arthur, Abby)

Effective Date: 29-OCT-2008      42824 Arthur, Abby

• Organization: Computer Science      1873      • Location: 211 University Services Center

People Group: Faculty      Qualifier: Non-Federal      Current Salary

Job: 007480 - Assistant Professor      Grade:      Date: 15-AUG-2008

• Position:      Employment Category: Regular      Amount: \$50,000.00

Basis of Service: 12 Month      Appointment End:      Minimum:      Maximum:      New Salary:     

Status: Active Assignment      Hours per week: 40

Change Reason:     

Conditions of Appointment:     

Creator Comments:     

Funding:	Account	Description	Start Date	End Date	Percent

Send into Approval Process

7. The new Organization and Location have already been selected based upon the responsibility you're signed into. If the default location is not the employee's place of work, use the LOV to select the correct value.
8. Enter information into any of the white fields necessary (Qualifier, Job, Position, Status, Hours per Week, New Salary).
9. In the Change Reason field, use the LOV to choose the correct value. (The Change Reason field is required for salaried employees.)
10. Include Conditions of Appointment and Creator Comments, if applicable.
11. After reviewing the changes, you may print this window by selecting File -> Print.
12. Click 'Send into Approval Process' to submit the changes for approval.
13. If required for this person's employee group, a Certification Form will be generated automatically. Please print and sign this form.
14. Close the CSU Assignment Changes screen and the Initiate Assgn Xfer screen.

**15. A transfer in Oracle routes first through the old department's hierarchy, then through the new department's hierarchy, and finally to Records and Payroll.**

When a change to an employee's assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.

**16. If this employee is State Classified, the new department must enter the employee's new supervisor in CSU Maintain Person -> Special Info -> Supervisor.**

**17. When this assignment change has been approved by the employee's old department, that approver will receive the following email which is a reminder to end-date the employee's account in Labor Distribution. Please refer to Unit 7: Labor Scheduling.**

**If the approver is not responsible for editing labor schedules, the email should be forwarded to the appropriate person in the department.**

**When final approval has been granted, the creator of this transfer will receive a similar email to remind him to add the new department's account to the employee's labor schedule.**

**Oracle HR Transfer Approval**

HRTEST [oracle@Almont.is.colostate.edu]

To:

Attachments:

---

System name: HRTEST

The personnel action for the transfer of the following employee has been granted approval at your department level. Please modify the labor schedule in Oracle HR for this employee.

Employee: D  
Asg#: 6741-3  
Effective: 31-Mar-2007  
Department: Athletics  
Item Key: 6780-28-MAR-07:43177

**18. When the transfer has been fully approved, the new department must set up a new account in the employee's Labor Distribution. Please refer to Unit 7.**

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## Creating a New Concurrent Assignment

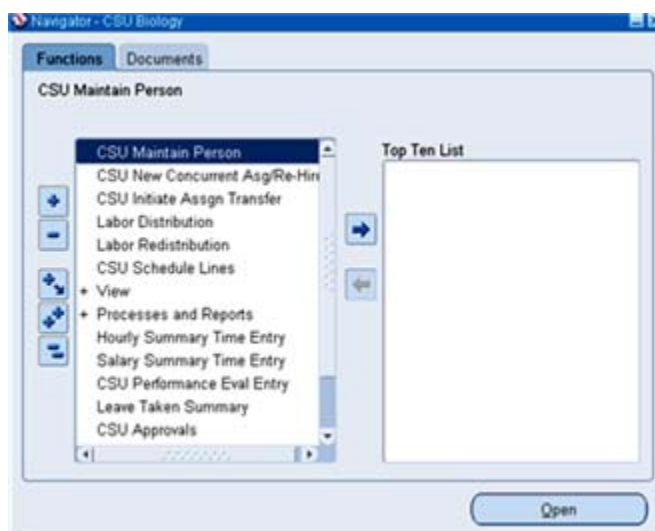
Use this process for creating a new assignment when an employee is changing Employee Groups or to give an employee a new job in any department.

An employee should not exceed 1 FTE (40 work hours per week) among all assignments held at the University. Be particularly careful of employees who are eligible for overtime payment, as this may be costly for the department.

When employees hold multiple active assignments, one will be designated as “primary”, and the pay advices for all assignments will be sent to this department. The employee will receive separate bank deposits for each assignment.

### Creating the Concurrent Assignment

1. Open CSU New Concurrent Asg/Re-Hire from the Navigator screen.



2. Enter the Effective Date which is the start date of the new assignment.

The screenshot shows a web browser window titled "CSU New Concurrent Asp/Re-Hire - 29-OCT-08". The form is divided into three steps:

- STEP 1 Fill in the Effective Date**: The "Effective Date:" field is highlighted in yellow.
- STEP 2 Enter SSN or CSU ID and search for the person**: The "SSN:" and "CSU ID:" fields are highlighted in yellow. A "Search for person" button is visible. Below these are fields for "Employee No.:", "Date of Birth:", "Full Name:", and "CSU Id:".
- STEP 3 Enter Assignment Info. and press the Create button**: Fields for "Employee Group:", "Payroll:", and "Pay Basis:" are highlighted in yellow. A "Summer Session" checkbox is also present. A "Create assignment" button is at the bottom.

3. Enter the employee's SSN (dashes are not required) and press Tab. If the SSN is in the HR system, all fields in Step 2 will populate. Confirm that you've located the correct person.

This screenshot shows the same form as above, but with Step 2 completed. The "SSN:" field contains "\*\*\*\*\*" and the "CSU ID:" field contains "821836786". The "Search for person" button has been clicked, and the following information is populated in the fields below:

- Employee No.: 42595
- Date of Birth: 10-DEC-1974
- Full Name: Drobny, Terra Lee 42595
- CSU Id: 821836786

The "Employee Group:", "Payroll:", and "Pay Basis:" fields in Step 3 remain highlighted in yellow. The "Create assignment" button is still visible at the bottom.

4. If you're told that the person cannot be found, please enter this employee as a new hire as directed in Unit 3.

If, after entering the SSN, the Employee No. field does not populate, this person is a contact (a dependent or beneficiary) of another employee. Close the Create Secondary Assignment window and send the following information to [hrs\\_data\\_systems@mail.colostate.edu](mailto:hrs_data_systems@mail.colostate.edu):

- Full name
- Last four digits of SSN
- Birthdate
- Hire date

5. In Step 3, select the appropriate Employee Group.

**Note:** A student can have only one work-study assignment, and Oracle will prevent you from creating a second. When necessary, an existing work-study assignment can be transferred to your department by following the instructions earlier in this unit for **Transferring an Employee into Your Organization**.

6. In the Payroll field, enter the appropriate value for the Employee Group:

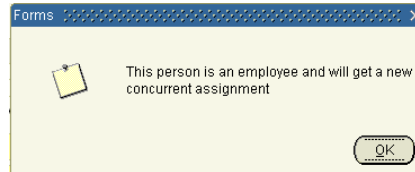
Use CSU Monthly for Faculty, Admin Professional, State Classified Salaried, Other Salaried, and Graduate Student employees.

Use CSU Biweekly for Non-Student Hourly, Student, and State Classified Hourly employees.

7. Click 'Create Assignment'.
8. If applicable for the employee group chosen, you may be prompted to select a Salary Basis (9-month or 12-month). If you are unsure at this time, you may

continue without making a selection by clicking 'Cancel'.

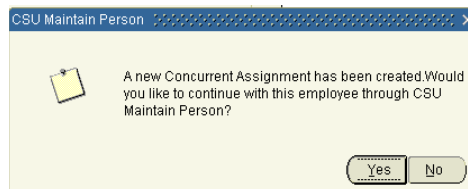
9. If the HR System finds that this employee is active, you will receive the following message. Click 'OK' to continue.



10. Next, the following window opens.

You may click 'Yes' to finish entering the information on the new assignment. You'll be taken to this employee's People screen.

Or you may click 'No' to create a new concurrent assignment for another employee. The CSU New Concurrent Asg/Re-Hire will clear and you may return to the beginning of this section.



**Completing Assignment Information**

1. If you clicked ‘Yes’, the People screen will open.
2. The People window displays the employee’s personal information. Verify the biographical information including the tabs, and the Address, Phones, and Special Information screens. Any changes you make affect this data for all departments in which the employee holds an active assignment.

CSU Departmental Person/Assignment Form: 01-JUN-2005

**Name**  
 Last: Cavett  
 First: Cole  
 Suffix:  
 Middle: C

Gender: Male  
 Action:  
 Person Type for Action:

**Person Types**  
 Employee

**Identification**  
 Employee: 22826  
 Social Security: 987-65-4324

**Personal** | Employment | Office Details | Other

Birth Date: 12-AUG-1954  
 Town of Birth:  
 Region of Birth:  
 Country of Birth:  
 Age: 50  
 Status:  
 Nationality:  
 Registered Disabled:

**Effective Dates**  
 From: 04-FEB-2005 To:  
 Latest Start Date: 04-FEB-2005 [ 98 ]

Address | Phones | Special Info | Assignment

3. Click the Assignment button. The Assignment window displays the employee’s primary assignment data.
4. Use the down-arrow on your keyboard to locate the new concurrent assignment that you just created. Several of the fields will be populated already.

Assignment: 01-JUN-2005(Cavett, Cole C)

Organization: Academic Advancement Center  
 Job:  
 Grade:  
 Location: GIBNS 117  
 Group: Other Salaried Employee, Non-Federal  
 Position:  
 Payroll: CSU Monthly Payroll  
 Status: Active Assignment

Assignment Number: 22826-2  
 Assignment Category: Temporary

**Salary Information** | Supervisor | Standard Conditions | Statutory Information | Miscellaneous

Salary Basis: Regular 12 Month Salaried  
 Review Salary: Every  
 Review Performance: Every

**Effective Dates**  
 From: 01-JUN-2005 To: [ ... ]

Salary | Entries | Entry History | Statement of Earni...

**5. For instructions on completing and zooming the new concurrent assignment, turn to the page indicated for this employee group. Except for the fields that are already entered in the new concurrent assignment, Unit 3: Hiring a New CSU Employee will take you through the rest of the concurrent assignment process.**

**Faculty or Admin Professional ..... 3.4**  
**State Classified ..... 3.23**  
**Other Salaried Employee..... 3.39**  
**Non-Student Hourly Employee ..... 3.56**  
**Graduate Assistant..... 3.70**  
**Student Employee..... 3.96**