HR Oracle Responsibilities

New Hires and Assignment Changes

A summary for campus HR staff
Learning Objectives

This presentation is not all inclusive and contains only general information as of Spring 2015. This summary should not be considered as a replacement for the more detailed information set forth in the certificates of coverage or master plan documents of benefit providers or information contained in the Faculty Manual or the State Personnel Board Rules. In the event of any discrepancies between the information in this document and in such other documents, the official documents will govern.
Collaborative HR Campus Accomplishments

Oracle Actions
- Payroll Calendar (Deadlines)
- Department Payroll Cycle
- Entry Authorization
- Grant a User Access
- Oracle Entry
- Required Paperwork
- Search Functionality

Department Payroll Review
- Email Notifications
- Generating Reports

Payroll Forms
- Direct Deposit
- W-4

Helpful Information
- New Hires
- Timely Benefits Enrollment
Collaborative HR campus accomplishments

Working together in 2014:

- Created 19,000 W-2s
- Enacted pay advices for employees located in 33 states
- Accomplished functional payroll responsibilities for $500 million in gross payroll
- 2,188 ‘quick pays and direct deposits’ processed outside of the normal payroll cycle to timely pay employees
Oracle Actions
## Payroll Calendar

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Year’s Day</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Deadline for receiving term paperwork for State Classified</td>
<td>Bi Weekly Pay Day for PPE 12/26</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>14</td>
<td>Bi Weekly Time File input due for PPE 01/09</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bi Weekly Time Check for PPE 01/09</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- Deadline for Monthly paper work to be submitted
- Deadline for Late Monthly paper work to be submitted**
When is the latest acceptable date to enter a late monthly action?

**Appropriate Unavoidable Hiring Circumstances**
- Employees hired under special conditions after the 10th of the month
- Inadvertent delays in the entry for LWOP (to avoid overpayment)
- Mid-month or prior month termination (to avoid overpayment)

**Utilizing the Latest Acceptable Deadline**
- Action must route through the approval hierarchy
- Department should monitor the progression of the action through to final approval to expedite timing
- Oracle actions not entered by the latest acceptable deadline may make create untimely pay circumstances for your employee
Campus Departments Payroll Cycle

Pre-Payroll Processing

Data Entry into Oracle:
- Enter New Hires
- Enter Terminations
- Update LWOP
- Enter Hours
- Setup/Update labor scheduling

Submit
- Paperwork
- Records
- Payroll

Review Oracle approvals:
- Validate status of changes
- Follow-up on outstanding items required for processing
- Contact HRS/Payroll with any concerns about deadlines
**Entry Authorization for Oracle Actions**

**HR Liaisons**

- When an action is submitted to hire an employee or change assignment details, the action appears in the CSU Approvals queue until all required levels have approved the action.

- *Only the person who submitted the action is able to review the informational notifications that are created as approvals are granted at each permission level*.

- Actions should be approved only by individuals authorized by the department head or department chair.

- If an action is approved by an unauthorized individual, it unfortunately is required to be rejected.

- Instructional guidance to approve or reject an action:
  
  [http://hrs.colostate.edu/hr-liaisons/approving-actions.html](http://hrs.colostate.edu/hr-liaisons/approving-actions.html)
How to Grant a User Access

**HR Liaisons**

- You may grant another user access to your worklist
- You and the alternative user must have HR access to the department
- This allows the other user to review any actions pending approval in Oracle HR submitted by you

☑ Instructional guidance to grant access to another user

[http://hrs.colostate.edu/hr-liaisons/QH-approvals-grant-access.html](http://hrs.colostate.edu/hr-liaisons/QH-approvals-grant-access.html)
Create a Custom View

**HR Liaisons**

- View options allow you to specify which group of notifications you wish to see and in what order.

- The HR system provides several available options to review information.

- You may choose one of these options or create one of your own to be the default which opens automatically each time you login to your approval queue.

Information guidance to create a custom view at [http://hrs.colostate.edu/hr-liaisons/QH-approvals-custom-view.html](http://hrs.colostate.edu/hr-liaisons/QH-approvals-custom-view.html)
**Simple Search**

**HR Liaisons**
- The simple search function allows you to look for a single notification or a group of notifications.
- Notifications are retained for 90 days.
- To obtain an approval report older than 90 days, please contact hrs_records@colostate.edu.

☑ Information guidance to perform a simple search

[http://hrs.colostate.edu/hr-liaisons/approving-simple-search.html](http://hrs.colostate.edu/hr-liaisons/approving-simple-search.html)
Entry of Oracle Actions – New Hires

New hires are created at the department level and the required approvals route through the hierarchy put in place by the department. The process varies by employee type:

• Faculty and Admin Professional: Department Head/Director --> Dean --> Academic VP/Provost --> Human Resources

• State Classified and Other Salaried: Department Head or Director --> Dean --> Human Resources

• Non-Student Hourly: Department Head or Director --> Human Resources

• Graduate Assistant: Department Head or Director --> Dean --> Graduate School --> Human Resources

• Student Hourly: Department Head or Director

• Work Study: Department Head or Director --> Student Employment
Data collection forms identify the information that is required for Oracle entry (may differ for each employee type):

- **Biographical Data**, completed by the employee
  - Reports gender, ethnic origin, disability status, and veteran status
- **Appointment Data**, completed by the department
  - Reports department, appointment type, employer group, hire date, etc.
- **Oath of Allegiance**
- **Direct Deposit**
- **W-4**
- **I-9 Employment Eligibility Verification** (and required documentation)
- **SSA-1945**
- **Creative Works Policy**
- **Employment Verification Law Form**
- **PERA / PERA Exclusion Form** (State Classified)
- **Compensatory Time Agreement** (State Classified)
Prior to HR approval the following steps are completed:

**Records**

- Review the new action or changes
- Verify required forms are received, accurate and complete

**Payroll**

- Confirms the action is complete (salary information and appointment type)
- **Action is Approved**
Campus Department Payroll Review
<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Year's Day</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CSU Holiday</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bi Weekly Payroll Processing</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Deadline for receiving term paperwork for State Classified</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>Bi Weekly Time File input due for PPE 01/09</td>
<td>Bi Weekly Time Clock validation for PPE 01/09</td>
<td>Bi Weekly Payroll Processing</td>
<td>Bi Weekly Payroll Processing</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td>March Luther King Jr Day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>Monthly Time File input due for PPE 12/31</td>
<td></td>
<td></td>
<td></td>
<td>Bi Weekly Payroll Processing</td>
</tr>
<tr>
<td></td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Bi Weekly Time File input due for PPE 01/23</td>
<td>Bi Weekly Time Clock validation for PPE 01/23</td>
<td>Bi Weekly Payroll Processing</td>
<td>Bi Weekly Payroll Processing</td>
<td>Bi Weekly Payroll Processing</td>
</tr>
</tbody>
</table>

*Note: Days marked with ** indicate deadline for late monthly paperwork to be submitted.*
Department Payroll Review

**Receive** Oracle automated email notification of completion of payroll processing.

**Generate** the Monthly Expense Distribution, Account Summary, and Employee Summary reports from Oracle.

**Review information:**
- Validate new employees, terminating employee, hours posted are paid correctly
- Validate all employees charged belong to your dept.
- Validate any LWOPs are for the correct amount/account number
- Generate any PPDAs if necessary.
- If another department has made the error, contact them to generate the redistribution.

**Create Reminders:**
Verify requested updates are completed for next payroll processing.
Campus Department Payroll Review

Email Notification

---Original Message---
From: owner-oracle_hrms_users@colostate.edu [mailto:owner-oracle_hrms_users@colostate.edu] On Behalf Of jobprd@mailer.is.colostate.edu
Sent: Tuesday, December 23, 2014 1:08 AM
To: HRMS User Listserv
Subject: Salary Payroll

All,

December salaried payroll processing is complete.

If applicable, you may run the monthly Certification Reports and Expense Distribution using
- Start Date: 22-NOV-2014
- End Date: 22-DEC-2014

The Employee Summary and Account Summary reports for December will be available in the VistaPlus Report Archive on 01-JAN-2015. An email will announce when the reports are ready to be viewed.

For assistance, contact:
hrs_data_systems@mail.colostate.edu or hrs_records@mail.colostate.edu
Campus Department Payroll Review

Post payroll reports are available after each hourly and salaried processing cycle and department validate entry accuracy.

Generate Reports

- **Monthly Expense Distribution**
  - Shows all hours, salaried and hourly dollars, and fringe costs that are charged to an account for that pay period

- **Account Summary**
  - Reports all employees paid from any account owned by the department. The report lists expended prior and current month dollars, projected encumbrances, and totals for all employees for the fiscal year

- **Employee Summary**
  - Includes employees in the department. It is different from the Account Summary report in that it lists employees’ pay and encumbrances by month for the fiscal year. It also has columns to show roll-ins and roll-outs for roll-forward accounts
General Payroll Forms
Direct Deposit

PAYMENT DISPOSITION ACTION (PDA)

EMPLOYEE INFORMATION (please print legibly in ink or type)

Your CSU ID # or Social Security #

Last Name, First, M.I.

0:00:00:00

SMITH, JOHN

Home Department: CSU COLLGE UNIT

CHECK ONE: Hourly (paid biweekly) Salary (paid monthly)

As of January 1, 1996, DIRECT DEPOSIT is a condition of employment at Colorado State University. The data you supply on this form determines where your net pay is deposited. If you have no active checking or savings account, contact the financial institution of your choice to establish an account. The original form should be mailed or delivered to the HRS Payroll Office, 6004 Campus Delivery. This information will be processed upon receipt by the Payroll Office.

We recommend that you verify your first deposit after the change before drawing against your account. Colorado State University cannot assume any fiscal liability for charges assessed against the employee due to erroneous bank account numbers, miscommunications, etc. Exemptions to mandatory direct deposit may be approved under limited circumstances. Contact the Payroll Manager at (970) 491-5882 to make an appointment for consideration.

THIS FORM SHOULD BE SUBMITTED AT THE TIME EMPLOYMENT BEGINS OR TO CHANGE AN EXISTING DIRECT DEPOSIT ACCOUNT NUMBER. RETURNING STUDENTS DO NOT NEED TO RESUBMIT THIS FORM AT THE BEGINNING OF A NEW SEMESTER.

DIRECT DEPOSIT DATA:

Name of Financial Institution: YOUR BANK

Street Address: 123 MAIN STREET

City, State, ZIP: FORT COLLINS, CO 80523

Bank Routing #

Account #

Account type (check one):

Financial Institution Phone #

EMPLOYEE AUTHORIZATION
(EMPLOYEE MUST SIGN)

I hereby authorize my employer to initiate credit entries and to initiate debit entries and adjustments for any credit entries in error to my (our) checking and/or savings account indicated above and the depositaries named above each hereby/thereby called Depositary, to credit and/or debit the same to such account(s).

Signed

Data

Campus (work) phone

Signed by the employee

Rev 06/10
Direct Deposit

The flow chart for an EFT

ODFI
Company’s Bank

Federal Reserve

RDFI
Employee’s Bank

I want Direct Deposit

Payroll

Employee
**Form W-4**

*Employee’s Withholding Allowance Certificate*

<table>
<thead>
<tr>
<th>Your first name and middle initial</th>
<th>Payroll</th>
<th>Your social security number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monty D</td>
<td>123-45-6789</td>
<td></td>
</tr>
</tbody>
</table>

3. Single

4. If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.

5. Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2):

6. Additional amount, if any, you want withheld from each paycheck:

7. I claim exemption from withholding for 2015, and I certify that I meet both of the following conditions for exemption:
   - Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
   - This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

**Signature**

Date

**For Privacy Act and Paperwork Reduction Act Notice, see page 2.**

Cat. No. 10220Q

Form W-4 (2015)
Form W-4

Employee's Withholding Allowance Certificate

1. Your first name and middle initial
   Monty D

2. Last name
   Payroll

3. Home address (number and street or rural route)
   3325 Trumble

4. City or town, state, and ZIP code
   Fort Collins, Co 80523

5. Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)
   3

6. Additional amount, if any, you want withheld from each paycheck
   $3

7. I claim exemption from withholding for 2015 and I certify that I meet both of the following conditions for exemption:
   - Last year I had no refund of all federal income tax withheld because I had no tax liability, and
   - This year I expect to have no tax liability.

8. Employer's name and address (Employer: Complete lines 8 and 10 only if sending to above address)
   Date:

New Forms must always be current year

First name, middle initial and last name must appear on the form

Address must be on the form

For Privacy Act and Paperwork Reduction Act Notice, see page 2.
**Form W-4**

**Employee's Withholding Allowance Certificate**

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Your first name and middle initial</td>
</tr>
<tr>
<td>2</td>
<td>Your social security number</td>
</tr>
<tr>
<td>3</td>
<td>Single □ Married □ Married, but withhold at higher Single rate</td>
</tr>
<tr>
<td>4</td>
<td>If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.</td>
</tr>
<tr>
<td>5</td>
<td>Total number of allowances claimed (from line H above or from the applicable worksheet on page 2)</td>
</tr>
<tr>
<td>6</td>
<td>Additional amount, if any, to be withheld from each paycheck</td>
</tr>
<tr>
<td>7</td>
<td>I claim exemption from withholding for 2015, and I certify that I meet all the conditions for exemption.</td>
</tr>
<tr>
<td></td>
<td>• Last year I had a right to a refund of all federal income tax withheld and there is no tax liability, and</td>
</tr>
<tr>
<td></td>
<td>• This year I expect a refund of all federal income tax withheld but there is no tax liability.</td>
</tr>
<tr>
<td></td>
<td>If you meet both conditions, write “Exempt” here.</td>
</tr>
<tr>
<td></td>
<td>Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true.</td>
</tr>
<tr>
<td>8</td>
<td>Employer's name and address (complete lines 8 and 10 only if sending to the IRS.)</td>
</tr>
<tr>
<td>9</td>
<td>Office code (optional)</td>
</tr>
<tr>
<td>10</td>
<td>EIN (Employer ID Number)</td>
</tr>
</tbody>
</table>

For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 10220Q  Form W-4 (2015)
Form W-4

Employee’s Withholding Allowance Certificate

1. Your first name and middle initial: Monty
   Last name: D
2. Your social security number: 123-45-6789
3. Home address (number and street or rural route): 3325 Trumble, Fort Collins, Co 80523
4. If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.
5. Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2): 3
6. Additional amount, if any, you want withheld from each paycheck: $0
7. I claim exemption from withholding for 2015, and I certify that I meet both of the following conditions for exemption.
   • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
   • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
   If you meet both conditions, write “Exempt” here.

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee’s signature: [Signature]
Date: [Date]

For Privacy Act and Paperwork Reduction Act Notice, see page 2.
Helpful Tips
New Hires

✓ Timely actions will create correct pay advice
✓ If a W-4 form is not received prior to processing a payment, the default taxation is Single & 0 (zero) allowances
✓ CSU Fiscal Rules require all State employees to utilize direct deposit
✓ Enter a physical address, not a campus delivery address (W2/Mailings)
✓ Payroll cannot approve an action until it is in the worklist
✓ Records cannot approve an action until all forms are received and complete
  • Be sure to complete the required Records forms
New Hires

✓ The 10th of the month deadline
  ◦ Any approved information received by the 10th will be processed
  ◦ Monitor the status of your action against the payroll calendar

✓ Mandatory Retirement Deductions
  ◦ CSU is not a Social Security Provider

✓ Faculty and Administrative Professional 9-month employees
  ◦ If an employee is hired at the beginning of the academic year, they may elect to participate in the 9/12 contract
  ◦ The pay pattern (1/2 month pay, May through August and full pay for September through April)
  ◦ Benefits eligible employees should be advised of double deductions for premiums in April and May
CSU Benefits

**Initial Enrollment Period**

- Enrollment required within 30 days of eligibility
  - PERA enrollment, by law, must be completed in 30 days
  - Pre-tax contributions must be completed in 30 days
  - Enrollment forms are completed following notification from Human Resources

- Enrollment required within 31 days of eligibility
  - Enrollment is completed on the State’s online system
    - PERA enrollment, by law, must be completed in 30 days
    - Pre-tax contributions must be completed in 31 days

**Benefits Effective Date**

- Benefits are effective the first of the month following eligibility date

- Benefits are effective the first of the month following eligibility date
Changes to Employees

- Departments must update the mailing/physical address of the employee.
- Payroll cannot approve an action until it is in the worklist.
- Records will not approve an action until all forms are received and complete.
  - Be aware of which forms Records will require for the type of employee being hired.
- All new assignments (concurrent) require new W-4 & Direct deposit.
- Transition between employee types creates more change.
  - State Classified vs. Faculty / Administrative Professional = different leave accruals, benefits, pensions.
  - State Classified hourly to salary or vice versa – issues with benefit deductions.
  - Changes to assignments that change benefits eligibility are processed by the HR-Benefits Unit.
Human Resources

555 S Howes Street, Second Floor
Fort Collins, CO 80523
(970) 491-MyHR (6947)

www.hrs.colostate.edu