Human Resource Management System
User Guide

Unit 1: HRMS Basics
Unit 2: DateTracking
Unit 3: Hiring a New Employee
Unit 4: Electronic Approvals
Unit 5: Maintaining Existing Employees
Unit 6: Summer Session Appointments
Unit 7: Labor Scheduling
Unit 8: Time Entry and Timeclocks
Unit 9: Performance Evaluation Module

Unit 10: Leave Module

Unit 11: User Reports
Unit 12: Associates

Appendix
Unit 10: Leave Module

This unit provides instruction on:

- **Entering Leave Taken** ........................................ 10.1
- **Adjusting Entries from Previous Batches** .............. 10.4
- **Correcting Validation Errors** .............................. 10.5
- **Leave Reports** .................................................. 10.7
- **Importing Leave** ..............................................

**Entering Leave Taken**

This section provides instruction on entering sick, annual, and family medical leave taken by leave-eligible employees.

Each month’s batch will be available from the 15th of the current month through the 14th of the next and will be retrieved on that night. If the 14th of the month falls on a weekend or holiday, your batch must be validated by the previous working day in order for it to be picked up over the weekend.

**Accruals** for the current month are always available for use as of the first of the **following** month.

1. From the Navigator screen, open the Leave Taken Summary.
2. The Batch field at the top of this screen indicates the month for which leave should be entered to keep leave records as current as possible.

Leave taken at any time during the current fiscal year may be entered in any batch.

To record leave taken in a different fiscal year, please use the Leave Change Request form located on the Human Resources website under Records.

3. You may add employees to your batch in the following ways:

   a. Type the employee’s last name in the Employee Name field and press Tab. The next two fields will populate automatically.

   b. Click the All Employees button. One blank line will be added for all leave eligible employees in your department. Unused lines will be deleted when you validate the batch.

   c. Click on an employee already in the batch and click the Duplicate button.

4. In the Element Name field, click the LOV button to choose the appropriate element from the list. Elements for State Classified employees begin with “SC” and elements for Faculty and Admin Professionals begin with “FAP”.

   • AL Reduce Taken - Use this element to reduce the number hours taken in a previous batch. This element requires that a comment be entered. Please state the date of the absence that you are reducing.
     
     To adjust the number hours taken in the current batch, simply edit or delete the entry.

   • AL Taken - Use this element to indicate the number of annual leave hours used.

   • SL Reduce Taken - Use this element to reduce the number hours taken in a previous batch. This element requires that a comment be entered. Please state the date of the absence that you are reducing.
     
     To adjust the number hours taken in the current batch, simply edit or delete the entry.

   • SL Taken - Use this element to indicate the number of sick leave hours used.

   • FMLA - Use this element to record the number of hours an employee has been out of the office for reasons that qualify under FMLA. This element does not affect leave balances; it is an informational element.
    
    - If an employee was out for 8 hours on sick leave that qualified as FMLA, you must enter an SL Leave Taken element for 8 hours and an FMLA element for 8 hours.
    
    - If an employee is out on LWOP that qualifies as FMLA, record the appropriate number of FMLA hours in the leave module.
5. Enter the Absence Start and Absence End dates. You may press Ctrl-L or click the LOV button to open the calendar.

6. The Cmnt field is required in the two cases below. Press Ctrl-E to open the field for viewing and editing. The Cmnt field is optional for all other elements.

   - Reduce Taken element - Indicate which hours/days are being reduced and for what reason.
   - Donation to Leave Bank - Enter the hours as Annual Leave Taken and note the number of hours being donated. Contact HRS Benefits (491-6737) with questions about leave bank donations.

   The contents of the Cmnt field will appear on the Leave Entry Report which opens when you successfully validate the batch.

   If the leave you are reducing is in the current batch, do not use a Reduce Taken element. Simply delete the line using the red X on the tool bar or edit the line as necessary.

   If you have already entered a Reduce Taken element and are now stuck in a loop of errors, click the Clear Record (pencil eraser) button on the toolbar. This will erase the data from the line so you can use the red X to delete the line.

7. Complete lines for each additional instance of leave taken for this and other employees. Consecutive days of leave should be recorded in one entry.

8. Sum the Hours column and enter this number in the Total Hours field.

   Reduce Taken and FMLA elements should be added into the total although they affect leave balances differently from Leave Taken elements.
9. Click Validate.

If your batch fails to validate, refer to the “Correcting Validation Errors” section later in this unit.

When your batch successfully validates, the Leave Entry report will open. You may print or save a copy of this report for your files.

---

Adjusting Entries from Previous Batches

Reducing the Amount of Leave Taken

These examples demonstrate how to reduce the number of hours an employee used if he, for instance, returned from vacation early. These instructions apply to batches that have already been picked up by Human Resources.

If the batch has not yet been picked up, you may make any necessary changes to the entries in the current batch and re-validate.

To increase the number of hours used during an absence, simply add another Leave Taken element to the current batch.

The following example works similarly for either type (sick or annual) of leave taken.

1. Eight hours of leave were recorded in the previous month’s batch, but only 6 hours of leave were actually used.

Original Entry:
Correcting Entry and Required Comments:

Reducing the Number of FML Hours Used

Reducing the number of FML hours recorded in a previous batch requires entering a negative FML Taken element.

1. In the leave batch, create a new line for the employee.
2. In the Element field, choose FMLA.
3. In the Hours field, enter a negative sign and the number of excess hours of FMLA that were reported in a previous batch (ie, -8).
4. When totaling the hours in the batch, subtract this number from the total.

Correcting Validation Errors

Errors labeled with “Warning” are informational only. Please review the error and either make adjustments to your batch or ignore the warning if appropriate. All “Fatal” errors must be resolved before the batch will validate.

Each error listed below is followed by an explanation of how to correct the problem.

1. “Either the assignment ID XXX or the assignment number XXX does not exist.”

   Please email the error message to hrs_data_systems@mail.colostate.edu.

2. “The hours in this batch will cause the balance to fall below zero. This is not allowed. Please contact HR. Current balance (excluding this batch) is: XX.”

   • Check the employee’s Leave Balances report to ensure that the leave was not previously entered.
   • Confirm that the employee’s monthly accrual is correct in the HR System.
   • Remember that a month’s accrual is not available for use until the first of the following month.
Leave Reports

3. **“Absence Start or End Date must be within fiscal year.”**

Departments are not permitted to enter leave that should have been entered during a previous fiscal year. Please complete the Leave Change Request Form posted on the Human Resources website under Records.

4. **“Employee not in this dept during absence start date - contact Records to record leave.”**

All of an employee’s leave should be entered and validated by the department **before the approval to transfer or terminate an employee is complete**. If this is not done, complete the Leave Change Request Form located on the Human Resources website under Records.

5. **“Total Hours (X) does not match calculated value (Y).”**

Please check the entries and recalculate the total hours. This number should match Y in the error message.

6. **“Primary Assg has status of LWOP during this time period - no leave allowed!”**

Confirm the dates of absence and the dates of LWOP and edit the leave element as necessary.

7. **“A comment must be entered for an Adjustment element; please enter a comment.”**

Click in the Cmnt field and press ctrl-E to open the field for editing. Explain why the Reduce Taken element was needed.

---

Leave Reports

**Leave Entry Report**

The Leave Entry Report is produced each time you successfully validate a batch and provides a summary of all lines in the batch. You may print it or save it when the report is displayed.

To locate and print the current month’s report at any time:

1. **Open Processes and Reports -> Find Requests -> Specific Requests.**
2. In the Name field, type “Leave Entry%”.

3. It may be necessary to adjust the number appearing in the Select the Number of Days to View field. This value defaults to 7.

4. Click ‘Find’. The most current Leave Entry Report will be at the top of this list.

5. Click ‘View Output’. When it opens in Adobe Acrobat, you may print it or save it.

To print the report for any month:

1. Open Processes and Reports -> Submit Processes and Reports -> Single Request.
2. In the Name field, type ‘Leave E’ and press Tab to select the Leave Entry Report from the LOV.
3. In the parameters box, press Ctrl-L to open the LOV.
4. Choose the month desired.
5. Click ‘OK’ and then ‘Submit’.
6. Click ‘Refresh’ until the report has completed.
7. Click ‘View Output’ to open the report in Adobe Acrobat. You may print or save the report.
Leave Summary Report

The Leave Summary Report displays leave balances for all employees in your department. You may run this for current employees or for all employees.

Hours recorded in the most recent batch will appear on this report after the batches are picked up and processed on the 14th of each month.

1. Open Processes and Reports -> Submit Processes and Reports -> Single Request.

2. In the Name field, type “leave s” and press Tab.

3. In the Parameters screen, enter the desired Effective Date - using the current fiscal year end (30-Jun-XX) provides a complete year-to-date report.

4. The Group field is optional. Use it to limit the report to a group of employees: choose FACAP for Faculty and Admin Professionals or STATE for State Classified employees.

5. The Employees field is optional. Enter ‘C’ for current employees or ‘A’ to include all employees with leave information for the fiscal year.

6. If you are in a College or Vice President office, you may use the Organization fields to restrict the organizations that are included in this report. Leave these fields blank to print all subordinate departments.

7. Click ‘OK’ and then ‘Submit’.

8. Click ‘Refresh’ until the report completes.

9. Click ‘View Output’. When the report opens in Adobe Acrobat, you may save or print this report.
Leave Balances Report

The Leave Balances Report displays an employees and their leave information for the fiscal year by month. You may run this for one employees or for all employees in your department.

Hours recorded in the most recent batch will appear on this report after the batches are picked up and processed on the 14th of each month.

1. Open Processes and Reports -> Submit Processes and Reports -> Single Request.
2. In the Name field, type “Leave B” and press Tab.
3. In the Parameters screen, enter the desired Effective Date - using the fiscal year end (30-Jun-XX) provides a complete year-to-date report.
4. The Group field is optional. Use it to limit the report to a group of employees: choose FACAP for Faculty and Admin Professionals or STATE for State Classified employees.
5. The Employees field is optional. Enter ‘C’ for current employees or ‘A’ to include all employees with leave information for the fiscal year.
6. You may specify one employee by entering the employee’s last name in the Employee field. Leave it blank to print all employees.
7. If you are in a College or Vice President office, you may use the Organization fields to restrict the organizations that are included in this report. Leave these fields blank to print all subordinate departments.
8. Click ‘OK’ and then ‘Submit’.
9. Click ‘Refresh’ until the report completes.
10. Click ‘View Output’. When the report opens in Adobe Acrobat, you may save or print this report.
Leave Reports

October 22, 2008

<table>
<thead>
<tr>
<th>Date</th>
<th>Entry</th>
<th>Hours</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>31 Dec 2005</td>
<td>Sick Leave Earned -1.50</td>
<td></td>
<td>LWOP Hours Adjustment</td>
</tr>
<tr>
<td>31 Mar 2006</td>
<td>Sick Leave Earned -1.50</td>
<td></td>
<td>LWOP Hours Adjustment</td>
</tr>
</tbody>
</table>

Leave earned in a month is automatically added to the leave balance(s) on the first working day of the following month. Generally, leave taken during a month is reflected in the system by the 15th of the following month, providing the employing department(s) report leave usage in the system in an accurate and timely manner.

Leave balances will be adjusted for previous time periods to accurately reflect proper recording of accruals and usage when errors are detected or leave usage has not been recorded in a timely manner.