Colorado State University

Human Resource Management System User Guide

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October 22, 2008

Unit 12: Associates

General Information

Associates of Colorado State University are individuals who are in some way affiliated with the University such that access to CSU's network and computing resources is required. Individuals cannot be paid through Oracle HR on an Associate assignment. They are classified in the following ways.

- **Affiliate -** Individuals employed outside the University who have a strong and continuing relationship with the University and whose training, experience, and activities contribute actively to the program of the department.
- **Federal Associate -** Federal Associates of CSU are maintained by Communications & Creative Services. Please contact Juliana Hissrich for assistance.
- **Guest Associate -** Individuals who are contractors, guests of an employee, or senior citizens in the community with departmental permission to audit a course which uses online resources.
- **Joint Appointment -** Faculty members or admin professionals whose professional activities fall, to an appreciable degree, within the purview of two departments.
- **Visiting Associates -** Research Associates, Scientists, Scholars, Senior Scientists and Senior Scholars who are members of the faculty for a short time while on leave from another institution.

Approvals

Joint, Affiliate, and Visiting Associates follow the same approval routing as other faculty, except that final approval is granted by HR Records.

Approval for Associate assignments may be granted by HR system users authorized to approve faculty and admin professional actions. In addition, the HR System Access Request Form now allows users to request authority to approve Associate actions.

Guests require approval by the department only.

Federal associates are maintained by Communications & Creative Services and require their approval only. Please contact Juliana Hissrich for additional information.

eID

Unlike paid employees whose future-dated assignments make them eligible for an eID, Associates must have a current, active, and approved assignment. To give an associate immediate access to CSU's network, please create the new hire or new concurrent assignment using today's date. The Associate can register for an eID the day after the assignment is fully approved.

The following timeline describes the "grace periods" allowed for Associate eIDs once the Associate's assignment has been terminated or the appointment end date reached.

- Live lag - 30 days; the eID remains active. If the Associate is reappointed in this period, the eID remains active without interruption.
- Dead lag - 45 days; the eID is inactive, but can be reactivated upon the Associate's reappointment in Oracle HR.
- Post-dead lag - the eID will be purged from the system if the Associate was not reappointed during the 75-day lag period.

Monitoring Appointment End Dates

The Associates with Specific End Dates Report, described at the end of this unit, should be run on a regular basis (i.e., monthly) to ensure that you are aware of Associates whose appointment end dates will soon expire.

ID Cards

ID cards are available to all Associates. The price has not yet been determined. Yellow paper cards will no longer be provided by Records.

When an Associate Assignment is Not Needed

Any employee who has an assignment in Oracle HR with an approval status of Pending Approval or Approved can claim and use an eID, regardless of the start date of the assignment. Therefore, it is generally unnecessary to create an Associate assignment for an employee who is to be hired by CSU.

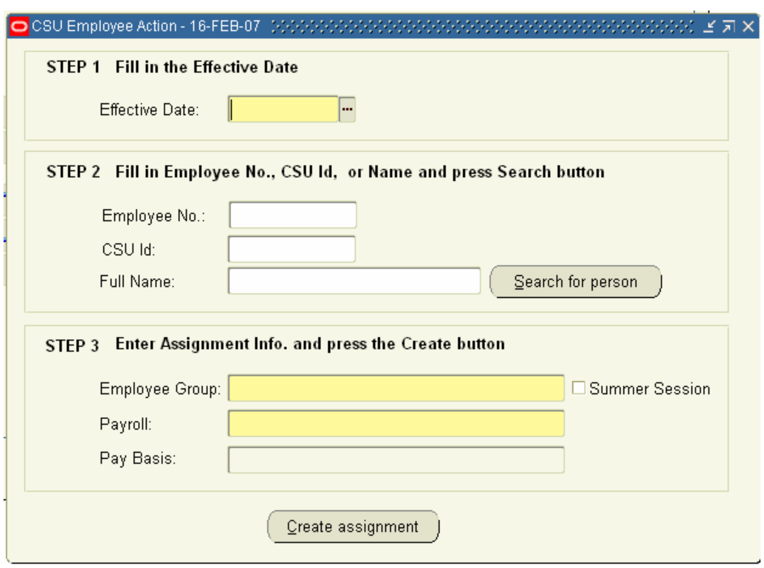
If the details of employment have not been fully determined so that the person can be entered in HR, two options are available.

1. Enter the new hire with the most accurate information available at the time, send for approval, but do not approve at the department level.
2. Create an associate assignment and, later, create the new hire as a new concurrent assignment.

Entering a New Associate

Before entering a new Associate in the HR system, please ensure that the individual is not already in the system using the CSU New Concurrent Asg/Re-Hire form as described below.

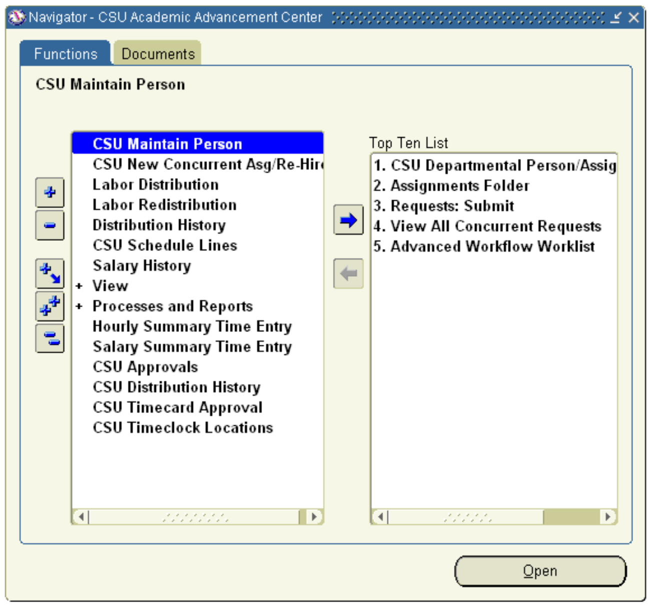
1. From the Navigator menu, open CSU New Concurrent Asg/Re-Hire.



2. **Enter the Associate's start date in the Effective Date field.**

3. **Enter part of the new Associate's last name in the Full Name field. Press Tab. If the new Associate's name appears in the list, please turn to the section in this unit called "Creating a New Concurrent Associate Assignment" for instructions.**

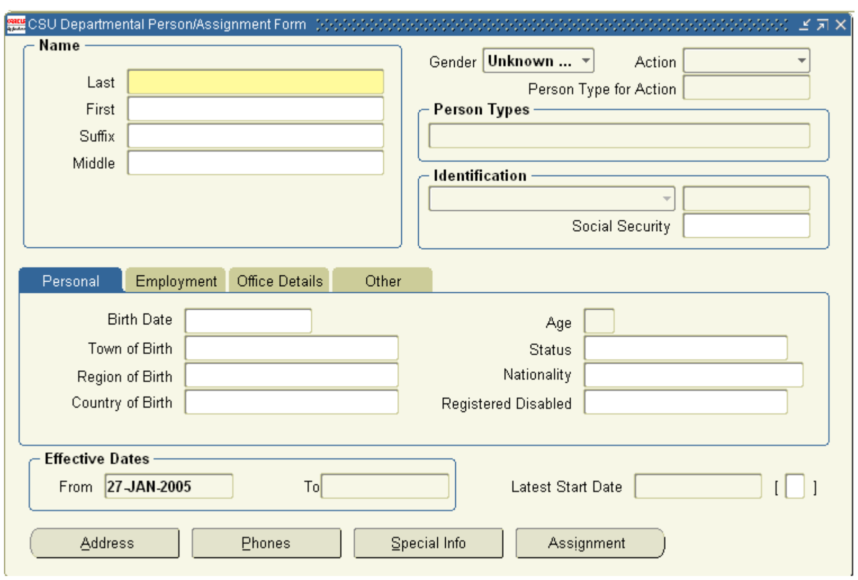
   If the new hire's name does not appear in the list, close this window to return to the Navigator screen.



4. **Open CSU Maintain Person.**

5. **When asked if you want to change the effective date, click 'Yes'. Enter the new Associate's start date and click 'OK'.**

6. **When the Find Person window opens, click 'New'.**



Completing the People Window

1. **Enter the Last, First, and Middle Name fields and the Suffix field, if applicable. (If you enter a middle initial, do not use a period after the initial.)**

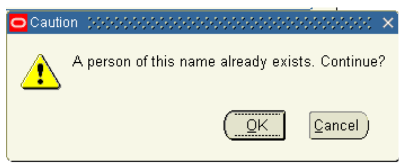
   If you receive the following error message, stop! Click 'Cancel' and email the following information to hrs_data_systems@mail.colostate.edu:

   • Full name

   • SSN (or replacement identifier)

   • Birthdate

   • Start date



2. **In the Gender field type 'M' or 'F' and press Tab or select the correct value from the LOV.**
3. **In the Action field, select Create Employment from the LOV, then select CSU Associate.**
4. **Enter the SSN in the Social Security field. If the individual is unwilling to disclose his SSN and has no plans for employment at CSU, please request a replacement identifier from hrs_records@mail.colostate.edu.**

   If the person is a contact (a dependent or beneficiary) of another employee, the following window will display.

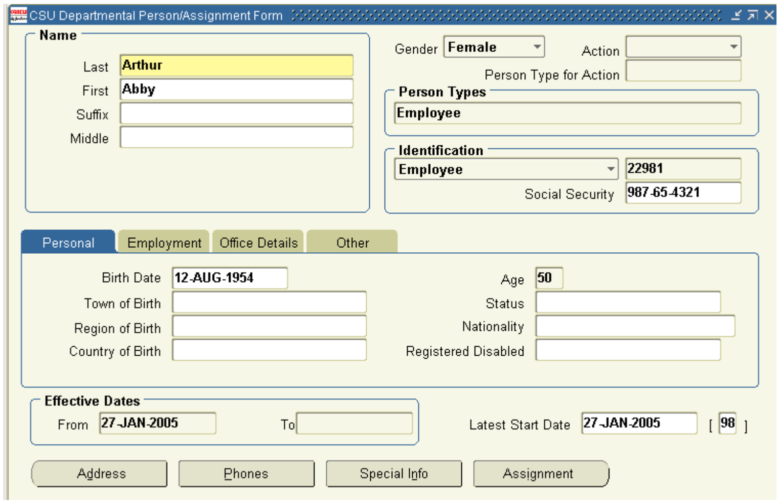
   Close the People window without saving and email the following information to hrs_data_systems@mail.colostate.edu:

   • Full name

   • Last four digits of SSN

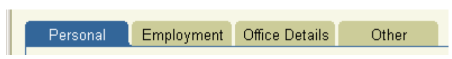
   • Birthdate

   • Hire date



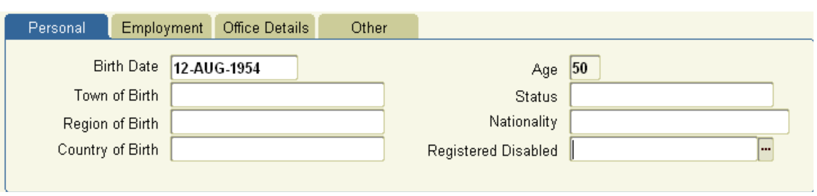
Completing the Tabs

The tabs across the middle of the People window contain several regions that can be accessed by clicking on each tab.



Personal Tab

1. **Enter the Birth Date using the standard HR system format: dd-mmm-yyyy.**
2. **Save.**



Completing Address Information

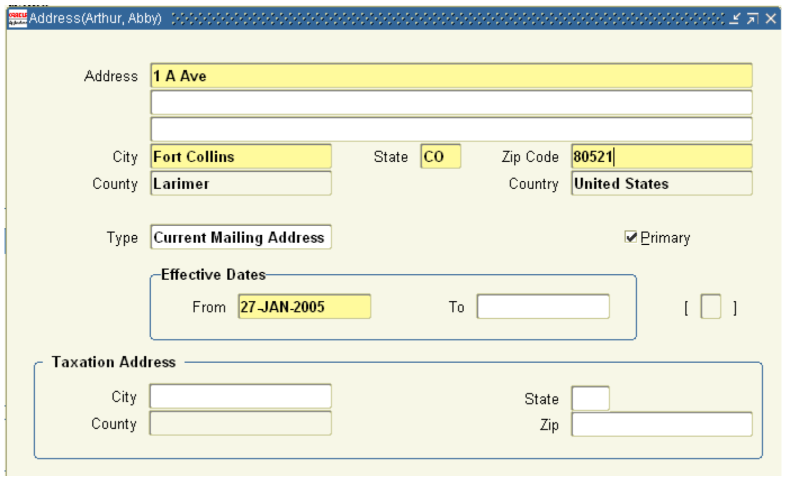
Although this information is not required, HR requests that it be collected from the Associate, if possible.

A foreign address may not be used for an Associate. If a local address is not available, please enter your departmental mailing address.

1. **From the People window, click the Address button.**

2. Complete the Address and Zip Code fields with the Associate's current mailing information. The remaining required fields will be populated when you save.

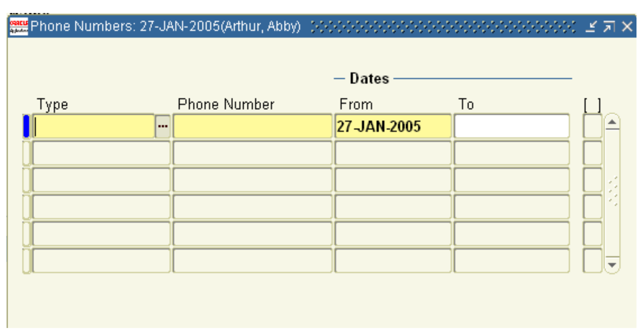
3. Save your work and close the Address window.



Completing Telephone Information

Although this information is not required, HR requests that it be collected from the Associate, if possible. If the Associate is to be listed in the directory with a phone number, this information must be entered.

1. From the People window, click the Phones button.



2. In the Type field, enter 'Home'.

3. In the Phone Number field, enter the home telephone number including area code.

4. The From field defaults to the DateTrack date. You may edit this field, if necessary.

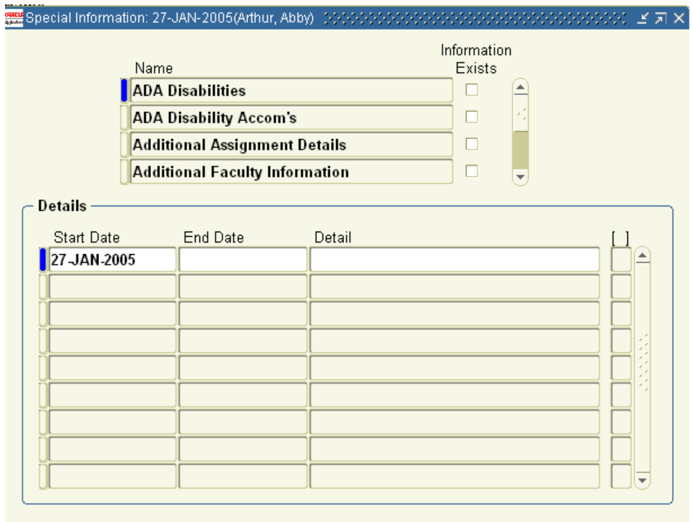
5. Down-arrow to the next line. In the Type field, enter 'Work', and enter the Phone Number and From fields as above.

6. Save your work and close the Phone Numbers window.

Completing the Special Information Table

Overview

1. **From the People window, click the Special Info button to display the Special Information Table.**



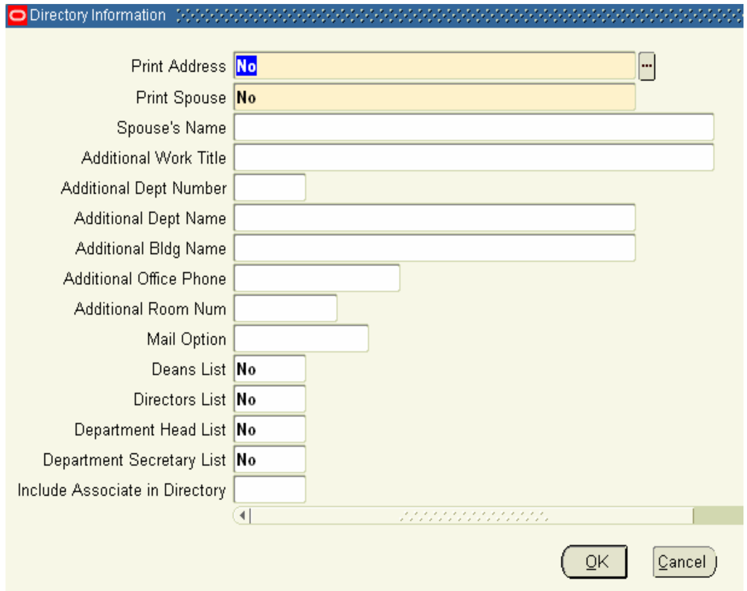
2. **Scroll down, if necessary, and click once in the Name field that you wish to activate.**
3. **Click the Detail field's LOV or press Ctrl-L to open the flexfield. Enter the necessary data.**
4. **Press enter to return to the Special Information Table. Save your work.**

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 the HR system a few times per week.

Please note that the last field on the screen must be 'Yes' in order for the following information to be included in the directory.

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

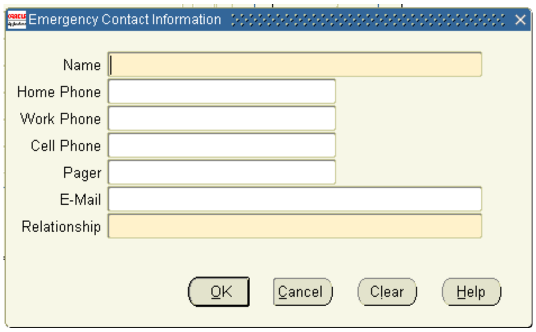


4. **All fields are optional, but the Include Associate in Directory field must be populated with "Yes" for the information to be included in the directories.**

- **Print Address -** Determines whether the associate's home address appears 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 Associate's job class. This field may be used to identify an Associate'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 Associate 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 Associate's assignment screen.
- **Additional Bldg Name, Additional Office Phone, and Additional Room Num -** If the Associate has a second office, enter the building name, phone number, and office number here. The associate's primary office building name and room number come from the People screen -> Office Details tab. The primary phone number comes from the People screen -> Phones button.
- **Mail Option -** If the Associate's mail should be delivered to a campus delivery location other than that of his primary assignment, please choose a value from the LOV.
- **Include Associate in Directory -** Determines whether the Associate is included (along with the above information) in the directory.

Emergency Contact Information

1. **Click the Detail field's LOV to open the flexfield.**
2. **Enter the Name and Relationship along with any other available data.**
3. **Click 'OK' to close the Emergency Contact Information window.**
4. **Save your work.**



Supervisor (Sponsor)

The name of the Associate's sponsor (i.e., the person with or for whom the Associate works) may be stored in the Supervisor SIT. In the future, this field will be used to assist you in maintaining your Associates.

1. **Click the Detail field's LOV to open the flexfield.**
2. **Choose the Associate's assignment from the Emp Assgn Number field's LOV.**
3. **Enter the last name of the Supervisor and press Tab. Choose the correct person, if you are given a list.**
4. **Click 'OK' to close the Supervisor window.**
5. **Save your work.**

Completing Assignment Information

An assignment identifies an individual's association with a department.

1. **From the People window, click the Assignment button.**
2. **When the Assignment window displays, confirm two things:**

   a. Ensure that the Organization field is populated with the correct department name.

   If it is not, then close the Assignment and People screens without saving. Switch to the correct department and open CSU Maintain Person. After using the Find window to pull up the Associate, open the Assignment screen and continue the hiring process.

   b. Ensure that the Effective Dates From field is populated with the Associate's start date.

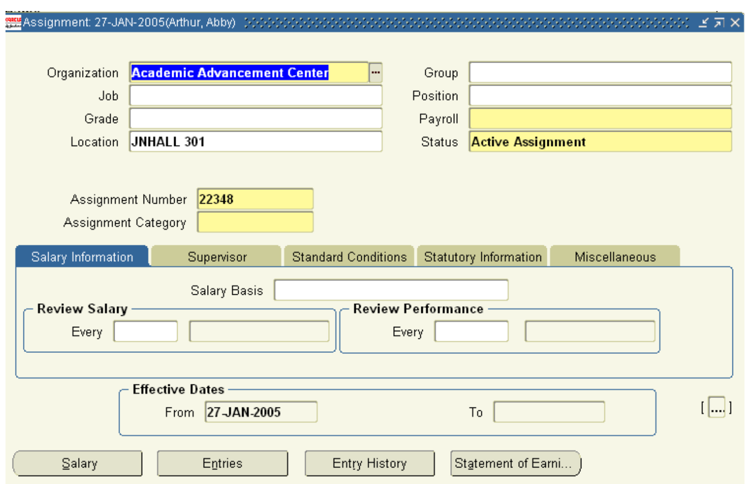
   If it is not, close Assignment and People screens without saving. Email the following information to hrs_data_systems@mail.colostate.edu:

   • Full name

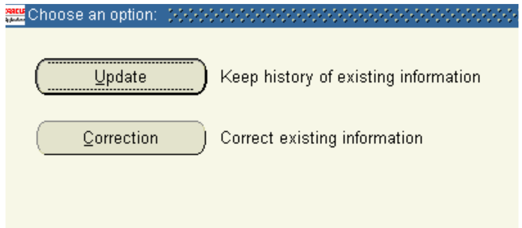
   • Employee number

   • Correct start date

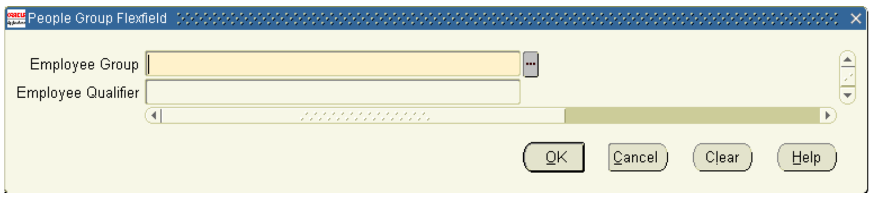
3. **Tab to the Group field.**



4. In the Choose an Option window, click 'Correction'. Always select Correction when working with a new assignment.



5. Open the Group flexfield by pressing Ctrl-L. In the Employee Group field, type 'As' for Associate and press Tab.



6. In the Employee Qualifier field type, press Ctrl-L and choose the appropriate qualifier. Press Enter to return to the Assignment window.

   - **Affiliate -** Individuals employed outside the University who have a strong and continuing relationship with the University and whose training, experience, and activities contribute actively to the program of the department.
   - **Federal Associate -** Federal Associates of CSU are maintained by Communications & Creative Services. Please contact Juliana Hissrich for assistance.
   - **Guest Associate -** Individuals who are contractors, guests of an employee, or senior citizens in the community with departmental permission to audit a course which uses online resources.
   - **Joint Appointment -** Faculty members or admin professionals whose professional activities fall, to an appreciable degree, within the purview of two departments.
   - **Visiting Associates -** Research Associates, Scientists, Scholars, Senior Scientists and Senior Scholars who are members of the faculty for a short time while on leave from another institution.

7. In the Job field, enter the appropriate job code from the list below:

- **Affiliate** - 007630
- **Federal** Associate - please contact Human Resources
- **Guest** Associate - 000003
- **Visiting** Research Associate - 009230
- **Visiting** Scientist/Scholar - 009240
- **Visiting** Sr Scientist/Scholar - 009250
- **Joint** Instructor - 007510
- **Joint** Assistant Professor - 007480
- **Joint** Associate Professor - 007450
- **Joint** Professor - 007420

8. Click in the Status field. Use the LOV to select “Associate - Active”.

9. Tab to the Assignment Category field and type ‘A’ for Associate.

10. Click on the Miscellaneous tab and populate the Reason field with “ASSOC/New Assignment”.

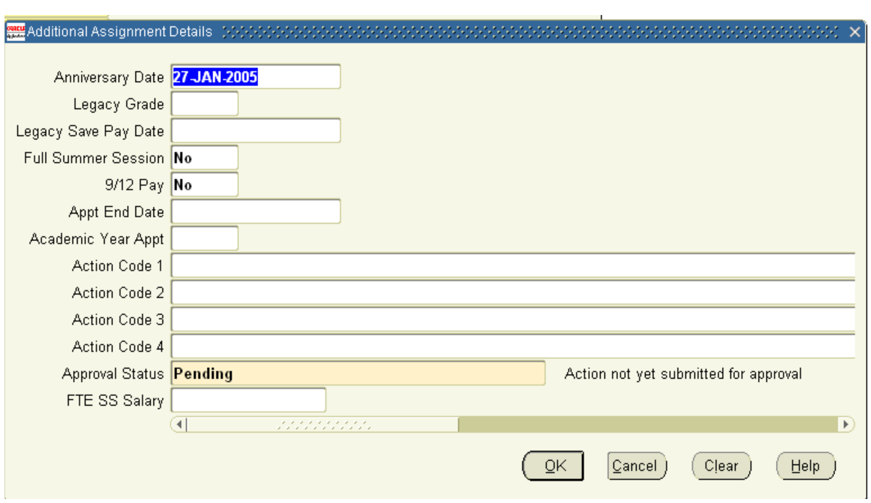
11. Save your work.

12. A Caution window will appear asking if you want to use the location of the new organization. Click ‘OK’.

13. The Appt End Date field should be completed for all Associates. Click in the beermug field in the bottom right corner of the screen. The Appt End Date field is the only field that should be altered on the beermug screen.

- **Joint, Affiliate, and Visiting Associates can be appointed for up to three years at a time.**
- **Guest Associates can be appointed for up to one year at a time.**

14. Click ‘OK’ to close the Additional Assignment Details window.

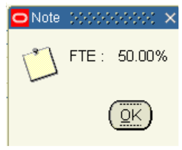


15. When the Choose an Option popup window displays, select ‘Correction’.
16. When the Assignment window displays, save your work.

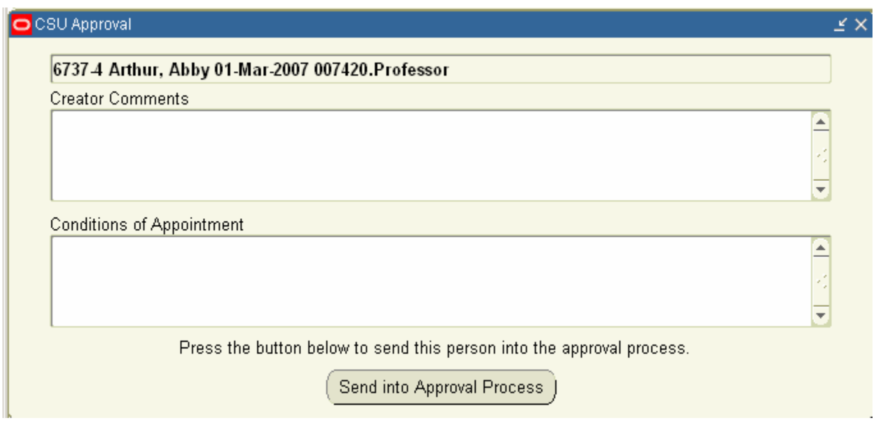
Submitting the New Associate for Approval

1. From the Assignment window, click the Zoom icon on the toolbar.

If the following window appears, move your cursor to any field other than the Working Hours field, then click Zoom again.



2. When the following window opens, please describe the Associate’s relationship to the University in either field. Text entered in Conditions of Appointment will appear on the Certification Form for Joint, Visiting, and Affiliate Associates.



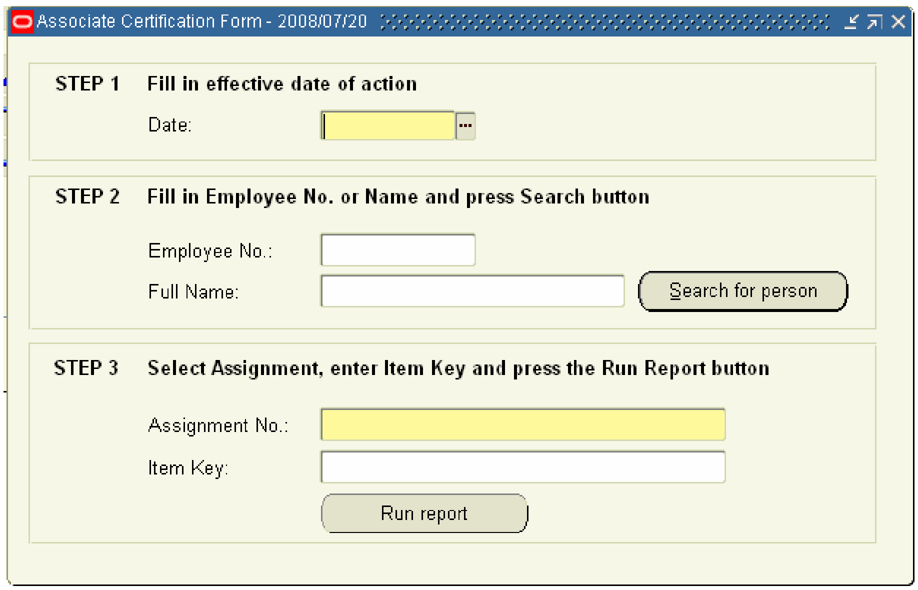
3. Click ‘Send into Approval Process’.
4. The action now requires approval from your department in CSU Approvals.

Printing the Associate Certification Form

Signed Associate Certification Forms must be sent to HR Records for Joint, Affiliate, and Visiting Associates. Guest nor Federal Associates require a Certification Form.

1. Ensure that the Conditions of Appointment in the Special Info Table accurately reflect the current assignment. The Certification Form displays any Conditions of Appointment data dated within 30 days of the assignment action.

2. From the Navigator screen, select Processes and Reports -> Associate Certification Form.



3. In the Date field, enter the Associate's start date.

4. In Step 2, enter either of the identification fields and press Tab to pull up the Associate.

5. Complete the Assignment No. field.

6. Leave the Item Key field blank. It is not required for a new assignment.

7. Click 'Run Report'.

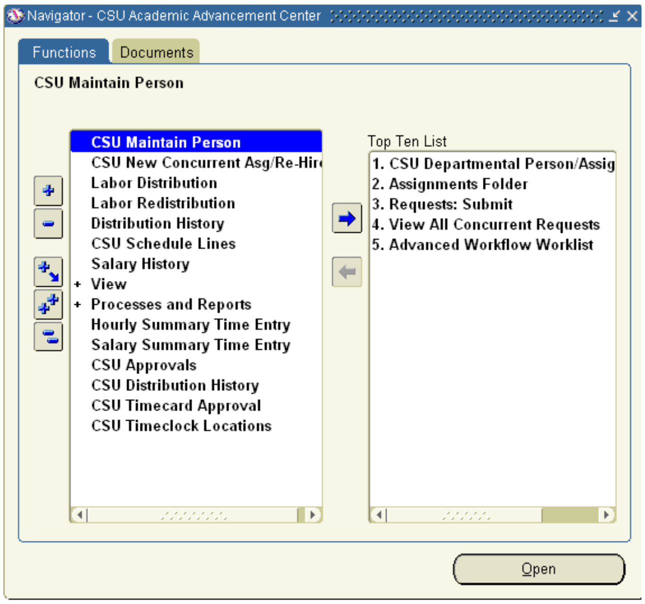
8. After the Associate signs and dates it, forward the form to HR Records.

Creating a New Concurrent Associate Assignment

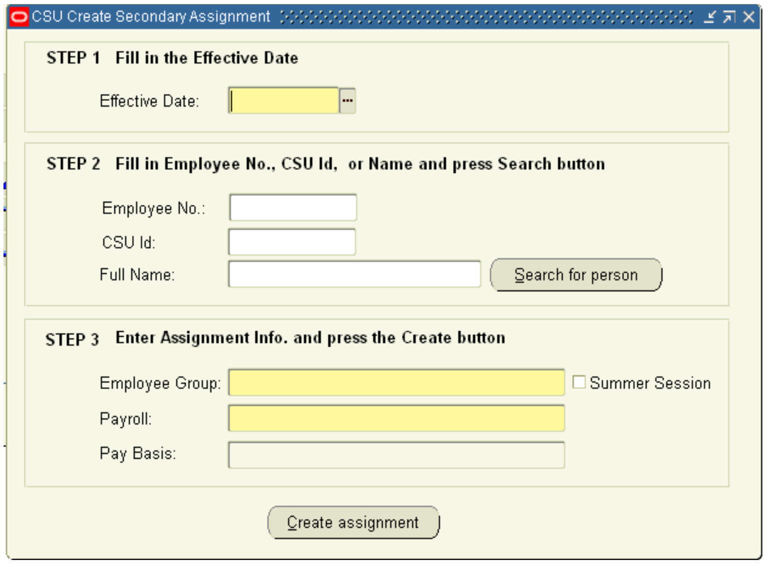
Use this process for creating a new assignment when a new Associate record is needed (ie, when an Affiliate changes to Guest or when an employee terminates but needs to retain access to CSU's electronic systems).

Creating the Concurrent Assignment

1. If you know that this person is already an active CSU employee, 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.**



3. **Enter the employee's last name, employee number, or CSU ID and click the Search for Person button. (If a window displays with more than one person listed with that last name, click on the correct one to choose it, and then click 'OK'.) The remaining fields in Step 2 will populate automatically.**

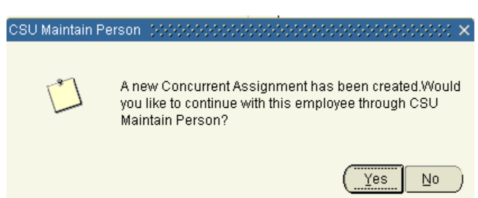
   If, after selecting the employee, the Employee No. field does not populate, this person is a contact (a dependent or beneficiary) of another employee. Close the Create Secondary Assignment window and email the following information to hrs_data_systems@mail.colostate.edu:

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

4. **In Step 3, the Employee Group field, type 'As' and press Tab. An active employee is not permitted to have an Affiliate or Visiting assignment.**
5. **Click 'Create Assignment'.**
6. **When the following window opens:**

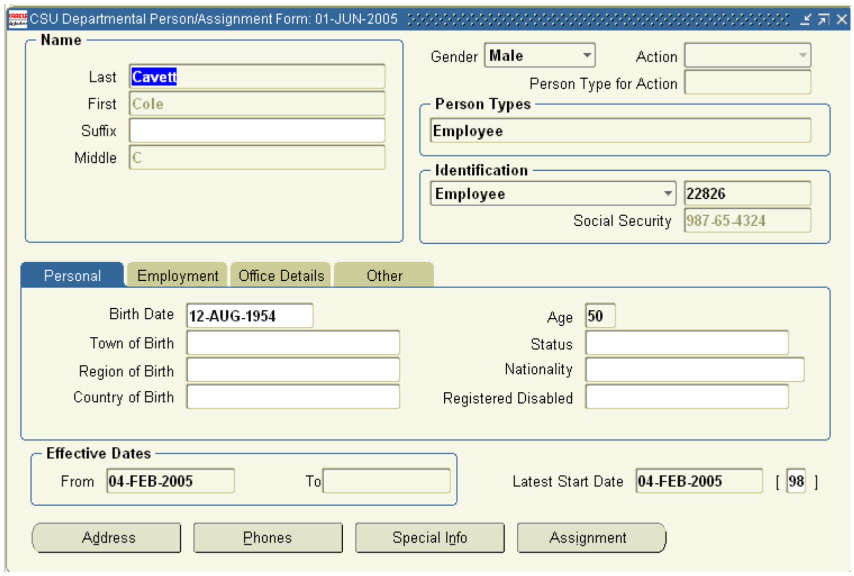
   Click 'Yes' to finish entering the information on the new assignment. You'll be taken to this Associate's People screen.

   Or, Click 'No' to create another new concurrent assignment.



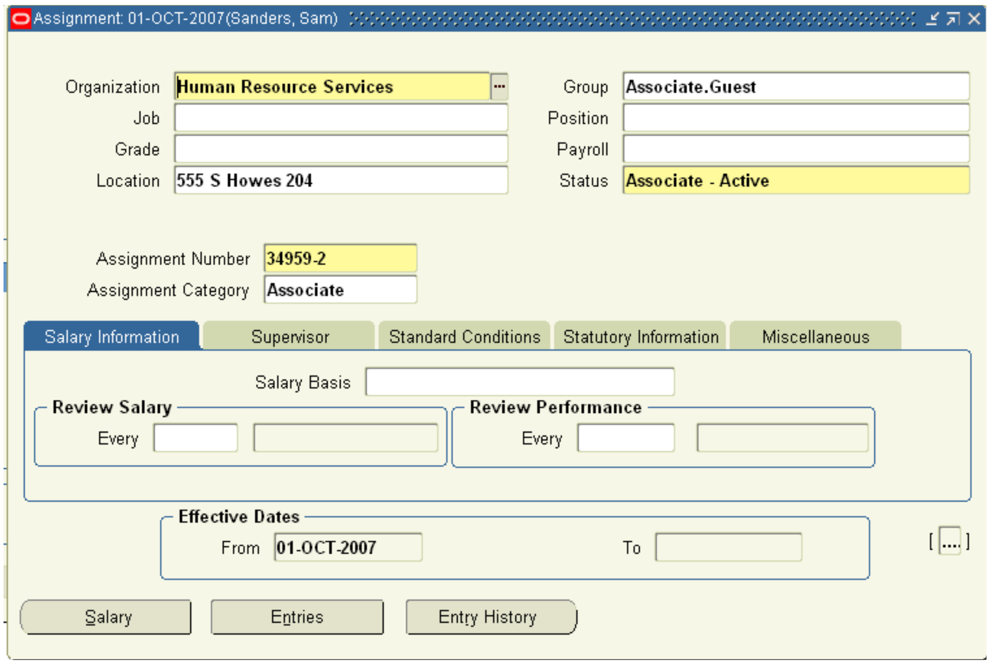
Completing Assignment Information

1. If you clicked 'Yes' in the previous step, the People screen will open.
2. The People window displays the Associate'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 this person is active.



3. Click the Assignment button. The Assignment window displays the Associate's primary assignment data.

4. Use the down arrow on your keyboard to locate the new concurrent assignment that you created. Most of the fields will be populated already.



5. In the Job field, enter the appropriate job code from the list below:

- **Affiliate** - 007630
- **Federal** Associate - please contact Communications & Creative Services
- **Guest** Associate - 000003
- **Visiting** Research Associate - 009230
- **Visiting** Scientist/Scholar - 009240
- **Visiting** Sr Scientist/Scholar - 009250
- **Joint** Instructor - 007510
- **Joint** Assistant Professor - 007480
- **Joint** Associate Professor - 007450
- **Joint** Professor - 007420

6. Click in the beermug field to enter the Appt End Date.

Joint, Affiliate, and Visiting Associates can be appointed for up to three years at a time. Guest Associates can be appointed for up to one year at a time.

7. Click 'OK' and save the Assignment screen.

8. Click the Zoom button on the toolbar to send the Associate for approval.

9. When the CSU Approval window opens, please describe the Associate's relationship to the University in either field. Text entered in Conditions of Appointment will appear on the Certification Form for Joint, Visiting, and Affiliate Associates.

10. Click the Send into Approval Process button.

11. The action now requires approval from your department in CSU Approvals.

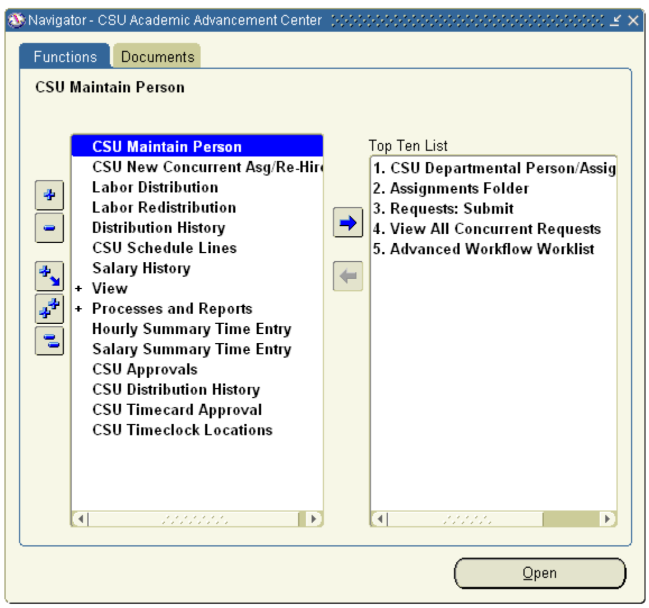
12. Additionally, before HR Records can approve the new assignment (guests excluded), an Associate Certification Form must be signed and delivered to HR Records. Please refer to the section earlier in this unit called "Printing the Associate Form".

Associate Assignment Changes

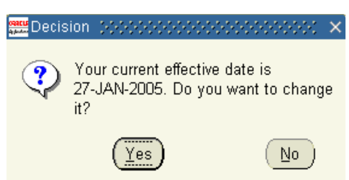
Use the CSU Assignment Changes screen to reappoint or terminate an Associate's assignment.

An Associate's Qualifier cannot be changed here (for instance, from Visiting to Affiliate). To make this change, please terminate the current Associate assignment and create a new concurrent assignment.

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

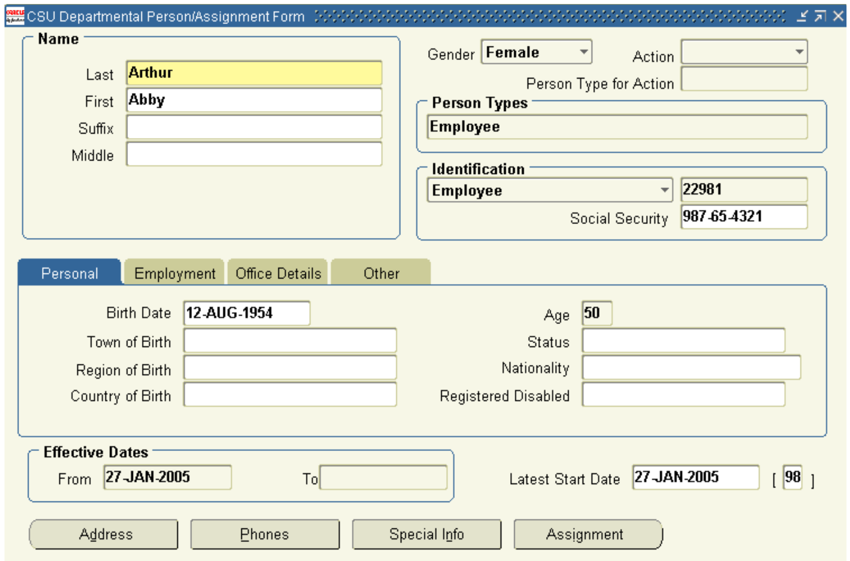


2. When asked if you want to change the effective date, click 'No'. You'll enter the effective date of this change later.



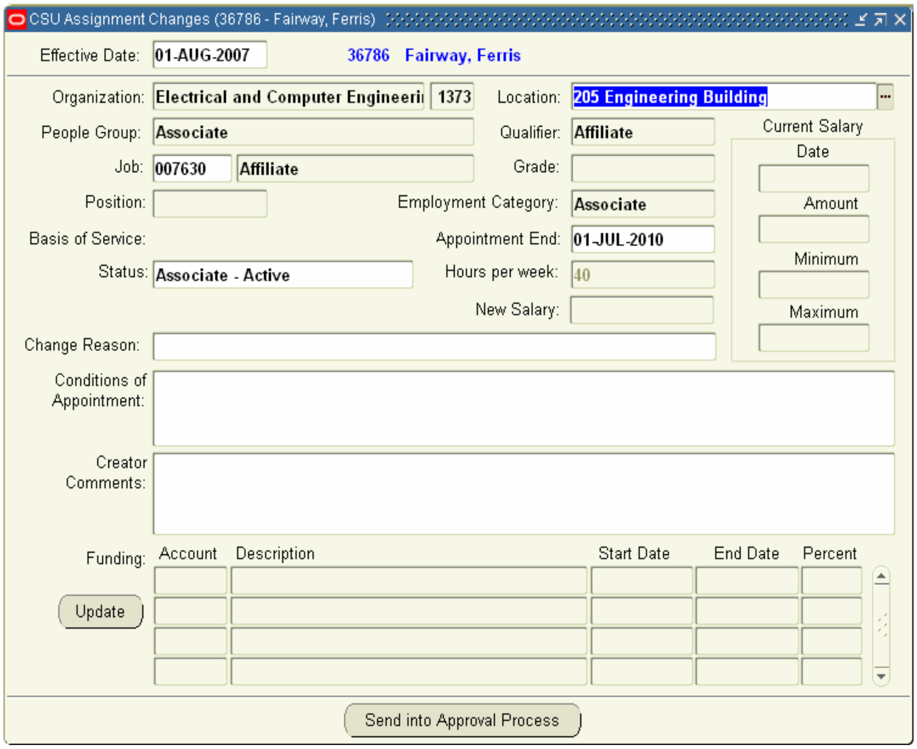
3. In the Find Person window enter the Associate's last name, SSN, or employee number and click 'Find'.

4. On the People screen, click the Assignment button.



5. Select the assignment you wish to change. If the Associate has more than one assignment, use the up- and down-arrows to scroll through them.
6. 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.



8. You may change the Associate's Location, Job, Appointment End, and/or Status.

9. Please select an appropriate Change Reason: TERM/Associate Appt or ASSOC/ Reappointment.

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

11. Any text that should be displayed on the Certification Form (for Joint, Affiliate, and Visiting Associates) should be entered in Conditions of Appointment.

12. In the Creator Comments field, enter a brief description of the action.

13. After reviewing the changes, you may print this window by selecting File -> Print or by clicking the Print icon.

14. Click 'Send into Approval Process'.

15. When the following window opens, click 'OK'.

16. Close the CSU Assignment Changes screen.

17. If this change reappoints a Joint, Affiliate, or Visiting Associate, please print the Certification Form according to the instructions earlier in this unit.

When a change to an Associate'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.

Reports

The reports listed below will assist you in maintaining Associates of your department. General instructions for running reports are here:

1. **From the Navigator screen, open Processes and Reports -> Submit Processes and Reports -> Single Request.**
2. **In the Name field, type part of the report's name and press Tab.**
3. **Select the report from the list, if a list is given.**
4. **If the Parameters screen opens, enter the requested information. This screen will be described below for each report.**
5. **Click 'Submit' to run the report.**
6. **When the Requests screen opens, click 'Refresh Data' periodically until the report completes. Or you may close this screen and return to it later by opening Processes and Reports -> View Requests -> Find.**
7. **Select the report and then click 'View Output'.**

Active Associate Listing

Provides a list of Associates in your department along with assignment information.

Parameters
Associate Type - Limit this report to one Associate type by choosing it from the LOV for this field or leave it blank for a list of all Associates in your department.

Associate Personnel File Data

Provides a detailed report of Associate assignment data.

Parameters
Associate Name, Associate ID#, Assignment Number - Fill in any one of these three fields to run this report for one Associate. These fields may be left blank.

Effective Date - The information displayed on the report will be that which is effective on the date entered.

Organization - For users with access to more than one department, this field can be used to select one department.

People Group - This field can be used to limit the report to one Associate type.

Associates with Specific End Dates - by Dept

Provides a list of Associates and their end dates.

Parameters
From Date, To Date - Please enter the date range of end dates you would like listed.

Organization 1, 2, 3 - Users with access to more than one department may restrict the list by populating one or more of these fields.