Unit 0: Introduction

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: The Leave Module

Unit 11: User Reports

Unit 12: Associates

Appendix
# Unit 3: Hiring a New Employee

Overview ................................................................. 3.2
Approval Process ...................................................... 3.2
Data Entry Requirements .......................................... 3.2
Records and Payroll Forms Required ............................. 3.3
Social Security Numbers ........................................... 3.3
Appointing Foreign Nationals .................................... 3.3
Employee ID Numbers .............................................. 3.3
Position Management .............................................. 3.4
W-2 Forwarding Address ............................................ 3.4
Hiring a Faculty or Administrative Professional Employee .... 3.4
Printing the Faculty/Admin Pro Certification Form ........... 3.22
Hiring a State Classified Employee ............................... 3.23
Hiring Other Salaried Employees ................................. 3.39
Hiring a Non-Student Employee ................................. 3.56
Hiring a Graduate Assistant Employee ....................... 3.70
Printing the Graduate Appointment and Certification Form ... 3.84
Hiring a Student Employee ........................................ 3.85
Hiring a Summer Session Employee ............................ 3.96
Approval Process

New hires are created at the department level in Oracle and are approved electronically. Approvals route through the hierarchy designated by the department.

The typical approval process, based on employee type, is as follows. These may vary by department, college, or vice president.

- Faculty and Admin Professional:
  Department Head or Director --> Dean --> Academic VP-Provost --> HRS

- State Classified and Other Salaried
  Department Head or Director --> Dean --> HRS

- Non-Student Hourly:
  Department Head or Director --> HRS

- Graduate Assistant:
  Department Head or Director --> Dean --> Graduate School --> HRS

- Student Hourly:
  Department Head or Director

- Work Study:
  Department Head or Director --> Student Employment

Data Entry Requirements

Data collection forms, found online at http://www.hrs.colostate.edu under the Records > New Hires Forms and Guides, identify the information that is required for input into the HR system to initiate the new hire process. Departments may input any additional information about their employees that the system is equipped to handle. Each form (one for each employee type) is divided into two parts: biographical data which should be completed by the employee and appointment data that may be completed by the department. These forms may be mailed to the new hire before his arrival on campus to initiate the hiring process.

The University is obligated to request certain biographical data (gender, ethnic origin, disability status, and veteran status) to meet various state and federal reporting requirements. Since providing this information is voluntary on the part of the employee, the University does not penalize anyone for refusing to provide it, and an employee should not be asked to submit information against his will.

Additionally, under the Americans with Disabilities Act, employers are required to keep health-related and disability information separate from other employee information. Therefore, if departments want to retain the Data Collection forms for their records, they must be kept separate from the departmental personnel files.
The New Hire Guides, also found on the Human Resources website, list the screens where the collected information should be input and follow the flow of the data input process. Some of the data, such as educational major/minor CIPs, collected on the Personnel Action Data form will need to be coded in the HR system and these forms show the actual data input requirements.

Records and Payroll Forms Required

When actions are forwarded to the HRS Records and Payroll offices for final approval, they will be held until the required employment forms have been received. The HRS Required Forms Checklist, found online at www.hrs.colostate.edu under the Records section, outlines all the forms for each employee type that must be submitted to HRS before final approval can be granted.

Social Security Numbers

Before a new hire can be entered in the HR system, he must provide his SSN or must have applied for one and have been granted a payroll control number. For more details, please contact the Foreign Tax Administrator at (970) 491-2911 or the International Programs office at (970) 491-5917.

Appointing Foreign Nationals

The University is required to comply with state and federal tax withholding and reporting requirements when making payments to nonresident aliens. Because these requirements are extremely complex, every foreign national employee is required to meet with the Foreign Tax Administrator before any payments can be made through the Colorado State University payroll system. Please call the Foreign Tax Administrator, located at 555 South Howes, Suite 311, at (970) 491-2911 to make an appointment.

Employee ID Numbers

The HR system automatically assigns a five-digit Employee ID number to each employee. This number is used in place of the employee’s social security number for employee indexing and reporting purposes. Employee social security numbers are confidential and should not be made available to anyone.
Position Management

Position numbers are required for the appointment of all Administrative Professional, Regular Faculty, and all State Classified employees. When Special or Temporary appointments are used to replace tenure or tenure-track Academic Faculty, the appointments should be made to the authorized Faculty position.

Positions are not required for other employees.

Please refer to the Appendix for more information on Position Management.

W-2 Forwarding Address

The HR system does not store a W-2 forwarding address. The employee is responsible for sending his W-2 form to the appropriate party.

Hiring a Faculty or Administrative Professional Employee

Before entering a new employee 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 hire date in the Effective Date field.
3. Enter the new hire’s SSN in the SSN field. Press Tab.

If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

If the person is a contact, the following window will display, click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:

- Full name
- Date of birth
- Hire date

4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’. 
Completing the People Window

1. Enter the Last, First, and Middle name fields and the Suffix field, if applicable, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
- Full name
- Date of birth
- SSN
- Hire 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 Employee.

7. When the Find Person window opens, click ‘New’.
4. Enter the SSN in the Social Security field.

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

5. Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   • Full name
   • Date of birth
   • 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. If applicable, select a value from the Registered Disabled field's LOV.
Completing the People Window

3.8

Employment Tab

In the Ethnic Origin field, choose the appropriate value from the LOV if provided by the new employee.

1. The I-9 Status and New Hire fields automatically populate. Do not alter these fields.

2. Complete the Veteran Status field, if applicable, using the LOV.

3. Save your work after making changes to the tabs.
Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

1. From the People window, click the Address button. Complete the Address and Zip Code fields with the employee's current mailing information. The remaining required fields will be populated when you save.
2. Save your work and close the Address window.

Completing Employee Telephone Information

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. Down-arrow to the next line. In the Type field, enter 'Work', and enter the Phone Number and From fields as above.
5. 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. In the lower half of the window, click in the Detail field LOV then 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 directories. 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. All faculty, admin pro, state classified, and other salaried employees are included in the directory without exception.

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.
Completing the Special Information Table

4. All fields are optional. The default values are shown above.

- **Print Address** - Determines whether the employee’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 employee’s job class on the assignment screen. This field may 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, Additional Office Phone, and Additional Room Num** - If the employee has a second office, enter the building name, phone number, and office number here. The employee’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 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.

- **Include Associate in Directory** - Applicable for Associates only.
Completing the Special Information Table

Education Information

Enter all of an employee’s degrees - not just the most advanced degree. To add a new education record, click in the next empty Detail field. Only one should be marked as terminal (if it truly is terminal, the highest attainable degree in that field of study) as that education record will be used in studies by Institutional Research.

1. The following fields are required by the system in the specified format:
   - **Degree** - free text (i.e., M. Science, B. Arts)
   - **Degree Level** - LOV
   - **Degree Category** - LOV
   - **Year Earned** - yyyy
   - **Major CIP Code** - LOV
   - **Major Description** - free text
   - **Minor CIP Code** (if applicable) - LOV
   - **Minor Description** (if applicable) - free text
   - **Terminal Degree Flag** - Yes or No (Is the degree considered ‘terminal’ or the highest attainable degree in this field?)
   - **Institutional Name** - free text
   - **Institution FICE Code** - LOV

2. Press Enter to return to the Special Information Table. Save your work.
Completing Assignment Information

Emergency Contact Information

1. Click in the Detail field then click the 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.

Salary Authority Dept

Please use this field to indicate the department responsible for determining the employee’s annual salary increase.

Completing Assignment Information

An assignment identifies an employee’s job in a department.

If this new employee is being hired on a 9-month appointment and the start date is during the Summer Session (May 16 - August 15), turn now to the section at the end of this unit on creating Summer Session appointments.

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 employee, go to the Assignment screen and continue the hiring process.

   b. Ensure that the Effective Dates From field is populated with the employee’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.
Completing Assignment Information

5. Open the Group flexfield by pressing Ctrl-L. In the Employee Group field, type ‘F’ for Faculty or ‘A’ for Admin Professional and press Tab.

6. In the Employee Qualifier field type ‘N’ for non-federal or ‘F’ for federal, then press Enter to return to the Assignment window.

7. For all Regular Faculty and all Administrative Professional, select the appropriate position from the Position field’s LOV. (In cases where Special or Temporary appointments are used to replace tenure or tenure-track Faculty, the appointments should be made to the authorized Faculty position.)

   The Job field will automatically populate after the Position field is entered.

   Click “YES” if the following message appears.

   ![Message Box]

   If this assignment does not require a position number, enter the 6-digit job class in the Job field or choose a job from the LOV.

8. In the Payroll field, enter ‘csu m’.

9. Tab to the Assignment Category field and type ‘R’ for Regular, ‘S’ for Special, or ‘T’ for Temporary.

10. Then press tab.

11. Select the Standard Conditions tab. Enter the Working Hours. To confirm that the work hours you entered corresponds with the employee’s %FTE, place your cursor in the Working Hours field and click the Zoom button.
Determining the Working Hours

The following is an example which shows how to determine the number of hours to enter in Standard Conditions for a Faculty employee who should be paid a certain amount of money for teaching one class.

• Scenario - The employee is to be paid $30,000 per year, full-time equivalent. She is to be paid $3,500 to teach one class from the middle of August through December.
• The $3,500 split between the 4 1/2 months would result in a monthly payment amount of $388.89 for August and $777.78 for September through December.
• As a 9-month employee with a $30,000 salary, the monthly pay rate would be $3,333.33 (calculated from $30,000 divided by 9 months).
• Divide the monthly rate that she is to be paid ($777.78) by the monthly rate based upon her annual salary ($3,333.33) to get a .2333 FTE.
• Multiplying .2333 FTE by 40 hours per week results in the 9.332 hours that should be entered in Standard Conditions. (You can add a second class to the assignment by doubling the assignment’s FTE.)
• If $1,000 should be paid from a specific account, in the Schedule Lines window, assign that account to be 28.57% ($1,000 / $3,500 = .2857) of the assignment’s funding. Funding is explained later in this section.

12. Select the Miscellaneous tab. Enter All/New Hire in the Reason field.

13. Save your work.
14. When the Decision window appears, select the appropriate Basis of Service.

15. If you made changes to the Standard Conditions (the Working Hours), a window will appear asking you if you want to use the standard conditions for the new organization. To reset the Working Hours to 40, click ‘OK’. To keep the change you made to the Working Hours field, click ‘Cancel’.

October 22, 2008
Completing Assignment Information

16. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose Cancel and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

17. The Appt End Date field should be completed in the following cases.

• Temporary appointments must have an end date which may be no more than two years from the start date of the appointment.
• All Regular, non-tenured, tenure-track Faculty appointments must have an end date. It is typically set to the end of the academic year.
• If the department chooses, Special appointments may have an appointment end date.

To enter an Appointment End Date, open the Additional Assignment Details flexfield by clicking in the beer mug field at the bottom right corner of the window. The Appt End Date field is the only field that should be altered on the beer mug screen.

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

18. When the Choose an Option popup window displays, select ‘Correction’.
19. When the Assignment window displays, save your work.
Completing Salary Information

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. Ensure that the hire date appears in the Change Date field.

3. Enter the annual salary in the Change Value field. This value should be based on full-time status (40 hrs/week) regardless of the employee’s Working Hours and must be a whole-dollar amount. Save your work and close the Salary window.

4. If you receive the following error message, close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field.

Correcting a Salary

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.
2. Delete the salary record by clicking the red X on the toolbar.
3. Save.
4. Re-enter the Change Value.
5. Save your work and close the Salary Administration window.
6. After making any other necessary changes, zoom the assignment for approval.
Submitting the New Hire 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, you may enter Creator Comments and Conditions of Appointment.

3. Click the Send into Approval Process button.
Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.

2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy block, click the round button to the left of Assignment. Save the change.
4. Enter the following information in the bottom half of the window.
   • GL Account
   • Start Date - the hire date
   • % - percent of the salary to be paid from this account

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

5. Save your work.


7. When the CSU Approval window appears, click ‘Send into Approval Process’ again.

8. A window appears to notify you that the person has been sent into the approval process. Click ‘OK’. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)

9. Close the Assignment and People windows (or press F4) to return to the Navigator window.
Printing the Faculty/Admin Pro Certification Form

Records must have the signed Certification Form, in addition to all other required paperwork, before the new hire will be approved. The Required Forms Checklist is posted on the HRS website under Records > New Hire Forms and Guides.

1. Ensure that the Conditions of Appointment in the Special Information 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 -> Acad Fac/Admin Pro Cert Form.

3. In the Date field, enter the employee’s hire date.

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

5. Enter the employee number in the Assignment No. field.

6. Leave the Item Key field blank. It is used only when printing a Certification Form for an assignment change such as a reappointment.

7. Click ‘Run Report’.

8. After the employee signs and dates it, forward the form to HRS. HRS must receive this form before approval can be granted.
Hiring a State Classified Employee

Before entering a new employee 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.

   ![Procedure Image]

   2. Enter the hire date in the Effective Date field.

   3. Enter the new hire’s SSN in the SSN field. Press Tab.

      If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

      If the person is a contact, the following window will display. Click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:

      - Full name
      - Date of birth
      - Hire date
4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’.

7. 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, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

   If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   • Full name
   • Date of birth
   • SSN
   • Hire 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 List Of Values, then select Employees.

4. Enter the SSN in the Social Security field.

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

   Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   • Full name
   • Date of birth
   • 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. If applicable, select a value from the Registered Disabled field's LOV.

### Employment Tab

1. In the Ethnic Origin field, choose the appropriate value from the LOV, if provided by the new employee.
2. The I-9 Status and New Hire fields automatically populate. Do not alter these fields.
3. Complete the Veteran Status field, if applicable, using the LOV.
4. Save your work after making changes to the tabs.
Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

1. From the People window, click the Address button.
2. Complete the Address and Zip Code fields with the employee’s current mailing information. The remaining required fields will be populated when you save.
3. Save your work and close the Address window.

Completing Employee Telephone Information

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.
Completing the Special Information Table

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

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. In the lower half of the window, click in the Detail field LOV then 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 directories. 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. All faculty, admin pro, state classified, and other salaried employees are inducted in the directory without exception.

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.
Completing the Special Information Table

4. All fields are optional. The default values are shown above.

- **Print Address** - Determines whether the employee’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 employee’s job class on the assignment screen. This field may 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, Additional Office Phone, and Additional Room Num** - If the employee has a second office, enter the building name, phone number, and office number here. The employee’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 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.
Completing Assignment Information

An assignment identifies an employee’s job in 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 employee, go to the Assignment screen and continue the hiring process.

b. Ensure that the Effective Dates From field is populated with the employee’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, select State Classified from the LOV or type ‘Sta’ and press Tab.

6. In the Employee Qualifier field type ‘N’ for non-federal.

7. Press Enter to return to the Assignment window.

8. In the Position field, type the position number. All State Classified assignments must have a unique position number. The Job field automatically populates after the Position field is completed.
Completing Assignment Information

9. When the following Decision window opens, click ‘Yes’.

10. Tab to the Grade field.

11. Enter the first letter of the job code and press Tab.

12. Scroll through the list of grades until you find the grade with “Yes” in the Valid for Job column.

13. Tab to the Payroll field and enter “CSU Monthly Payroll” for salaried employees or “CSU Bi-Weekly Payroll” for hourly employees.

14. Tab to the Assignment Category field and select “Regular” from the LOV or simply type an ‘R’.

15. Select the Standard Conditions tab. Enter the Working Hours. For an hourly state classified employee, enter 0 Working Hours.
16. To confirm that the work hours you entered corresponds with the employee’s %FTE, place your cursor in the Working Hours field and click the Zoom button.

17. Select the Miscellaneous tab. Enter All/New Hire in the Reason field.

18. Save your work.

19. If you made changes to the Standard Conditions Working Hours field, a window will appear asking you if you want to use the standard conditions for the new organization.

   To keep the change you made to the Working Hours field, click ‘Cancel’.

20. A Caution window will appear asking if you want to use the location of the new position. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

   If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose Cancel and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

   October 22, 2008
Completing Salary Information

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. Ensure that the hire date appears in the Change Date field.

3. For salaried employees, enter the annual salary in the Change Value field. This value should be based on full-time status (40 hrs/week) regardless of the employee’s Working Hours and must be evenly divisible by 12.

For employees expected to work only 9 months per year, enter the full-time 12-month salary and place them on Leave Without Pay during the months they are not working.

For hourly employees, enter the salary as an hourly amount in the Change Amount field.

For all state classified employees, the salary must fall within the Grade Salary Limits on the right side of the Salary screen. For most new hires, the salary must be the grade minimum unless a higher rate is approved by the Director of Human Resources. See Section 3 of the Human Resource Manual for exceptions.
Completing Salary Information

4. Save your work and close the Salary window.

5. If you receive the following error message, please close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field.

Correcting a Salary

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.
2. Delete the salary record by clicking the red X on the toolbar.
3. Save.
4. Re-enter the Change Date and Change Value.
5. Save your work and close the Salary Administration window.
6. After making any other necessary changes, zoom the assignment for approval.
Submitting the New Hire for Approval

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

   ![Zoom icon](image)

   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, enter the Creator Comments and Supervisor fields.

3. Click the ‘Send into Approval Process’ button.

   ![Approval window](image)

Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.
2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy block, click the round button to the left of Assignment.

4. Save the change.

5. Enter the following information in the bottom half of the window.
   - GL Account
   - Start Date - the hire date
   - % - percent of the salary to be paid from this account. For hourly employees, the % is always 0.

The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

6. Save your work.


8. When the CSU Approval window appears, click ‘Send into Approval Process’ again.
9. A window appears to notify you that the person has been sent into the approval process. Click ‘OK’. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)

10. Close the Assignment and People windows (or press F4) to return to the Navigator window.
Hiring an Other Salaried Employee

This section includes hiring instructions for Postdoctoral Fellows, Fellowship Grant Trainees, Clinical Psychology Interns, Veterinary Interns, and Veterinary Residents.

Before entering a new employee 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.

![Image of CSU New Concurrent Asg/Re-Hire form]

2. Enter the hire date in the Effective Date field.

3. Enter the new hire’s SSN in the SSN field. Press Tab.

   If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

   If the person is a contact, the following window will display, click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - Hire date
4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’.

7. 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, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
• Full name
• Date of birth
• SSN
• Hire 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 Employee.

4. Enter the SSN in the Social Security field.

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

5. Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - 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. If applicable, select a value from the Registered Disabled field’s LOV.
Completing Employee Address Information

Employment Tab

1. In the Ethnic Origin field, choose the appropriate value from the LOV if provided by the new employee.

2. The I-9 Status and New Hire fields automatically populate. Do not alter these fields.

3. Complete the Veteran Status field, if applicable, using the LOV.

4. Save your work after making changes to the tabs.

Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

1. From the People window, click the Address button. Complete the Address and Zip Code fields with the employee’s current mailing information. The remaining required fields will be populated when you save.

2. Save your work and close the Address window.
Completing Employee Telephone Information

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.
Completing the Special Information Table

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.
5. 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 Oracle 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.
Completing the Special Information Table

4. All fields are optional.

- **Print Address** - Determines whether the employee’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 employee’s job class. This field may 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, Additional Office Phone, and Additional Room Num** - If the employee has a second office, enter the building name, phone number, and office number here. The employee’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 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.

**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.
Completing Assignment Information

**Supervisor**

1. The employee’s assignment number defaults in the Emp Assgn Number field.

2. Enter part of the supervisor’s name in the Supervisor field and press tab. Select the supervisor from the list that appears.

3. The Supervisor Employee Number field automatically populates with the correct employee number.

4. Press enter to return to the Special Information window.

5. Save your work.

**Completing Assignment Information**

An assignment identifies an employee’s job in a department.

If this new employee is being hired on a 9-month appointment and the start date is during the Summer Session (May 16 - August 15), turn now to the section at the end of this unit on creating Summer Session appointments.

1. From the People window, click the Assignment button.
Completing Assignment Information

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 employee, go to the Assignment screen and continue the hiring process.

   b. Ensure that the Effective Dates From field is populated with the employee’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 ‘O’ for Other Salaried and press Tab.

6. In the Employee Qualifier field, type ‘N’ for non-federal, or select it from the LOV.

7. Press Enter to return to the Assignment window.

8. In the Job field, select the appropriate Job from the LOV and click ‘OK’ or enter it from the list below.
   - 009930 - Clinical Psychology Intern
   - 009940 - Veterinary Intern
   - 009950 - Veterinary Resident
   - 009990 - Postdoctoral Fellow
   - 009991 - Fellowship Grant Trainee (includes former Post Doc Trainees, former Graduate Assistants, and Undergraduate Training Recipients)

9. In the Payroll field, enter CSU Monthly.

10. Tab to the Assignment Category field and select Temporary from the LOV, or type ‘T’.

11. Save your work.

12. Select the Standard Conditions tab. Enter the Working Hours. To confirm that the work hours you entered corresponds with the employee’s %FTE, place your cursor in the Working Hours field and click the Zoom button.

13. If the employee is a Veterinary Intern, Clinical Psychology Intern, or Postdoctoral Fellow, select the Miscellaneous Alternate Region. In the Reason field, enter All/New Hire.

If the employee is not one of these three types, skip this step.
14. Save your work.

15. When the popup window appears, select the appropriate Basis of Service.

16. If you made changes to the Standard Conditions (Working Hours), a window will appear asking you if you want to use the standard conditions for the new organization. To keep the change you made to the Working Hours field, click ‘Cancel’.

17. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization. If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose Cancel and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

18. Open the Additional Assignment Details flexfield by clicking in the beer mug field in the bottom right corner of the Assignment window.
Completing Salary Information

19. Complete the Appt End Date field. The guidelines below provide the typical duration for appointments.
   • Postdoctoral Fellow - 3 years
   • Fellowship Grant Trainee - 3 - 5 years
   • Veterinary Resident - 3 years
   • Veterinary Intern - 1 year
   • Clinical Psychology Intern - 1 year

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

21. If you made changes, the Choose an Option popup window will display. Select ‘Correction’.

22. When the Assignment window displays, save your work.

Completing Salary Information

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. Ensure that the hire date appears in the Change Date field.
3. Enter the annual salary in the Change Value field. This value should be based on full-time (40 hrs/week) status regardless of the employee’s Working Hours and must be a whole-dollar amount.

4. Save your work and close the Salary window.

5. If you receive the following error message, please close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field.

Correcting a Salary

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.
2. Delete the salary record by clicking the red X on the toolbar.
3. Save.
4. Re-enter the Change Date and Change Value.
5. Save your work and close the Salary Administration window.
6. After making any other necessary changes, zoom the assignment for approval.

Submitting the New Hire 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, you may enter Creator Comments and Conditions of Appointment.

3. Click ‘Send into Approval Process’.

Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.
2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy box, click the round button next to Assignment.

4. Save.

5. Enter the following information in the bottom half of the window.
   - GL Account
   - Start Date - the hire date
   - % - percent of the salary to be paid from this account

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

6. Save your work.

7. Close the Schedule Lines and Labor Scheduling windows to return to the CSU Approval window.

8. Click the Send into Approval Process button again.
9. A window appears to notify you that the person has been sent into the approval process. Click ‘OK’. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)
Hiring a Non-Student Hourly Employee

Before entering a new employee 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.

![Image of CSU New Concurrent Asg/Re-Hire form]

2. Enter the hire date in the Effective Date field.

3. Enter the new hire’s SSN in the SSN field. Press Tab.

   If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

   If the person is a contact, the following window will display, click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:

   • Full name
   • Date of birth
   • Hire date
4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’.

7. 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, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

   If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   • Full name
   • Date of birth
   • SSN
   • Hire 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 Employee.

4. Enter the SSN in the Social Security field.

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

5. Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - 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. If applicable, select a value from the Registered Disabled field’s LOV.
Employment Tab

1. In the Ethnic Origin field, choose the appropriate value from the LOV if provided by the new employee.

2. The I-9 Status and New Hire fields automatically populate. Do not alter these fields.

3. Complete the Veteran Status field, if applicable, using the LOV.

4. Save your work after making changes to the tabs.

Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

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

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

3. Save your work and close the Address window.
Completing Employee Telephone Information

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.
Completing the Special Information Table

2. Scroll down, if necessary, and click once in the Name field that you wish to activate.
3. In the lower half of the window, click in the Detail field LOV then press Ctrl-L to open the flexfield. Enter the necessary data.
4. Press Enter to return to the Special Information Table.
5. Save your work.

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.
Completing Assignment Information

An assignment identifies an employee’s job in 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 employee, go to the Assignment screen and continue the hiring process.

   b. Ensure that the Effective Dates From field is populated with the employee’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 ‘N’ for Non-Student Hourly and press Tab.

6. In the Employee Qualifier field type ‘N’ for non-federal.
7. Click the OK button to return to the Assignment window.
8. In the Job field, select the appropriate job from the LOV and click ‘OK’.

   Non-student hourly assignments cannot use a student job title.

9. Tab to the Grade field. For Non-Student Hourlies who have a State Classified job class, type the first letter of the job class in the Grade field and press Tab. Page down until you find the grade with a ‘Yes’ in the Valid for Grade column.

   For Non-Students in all other job classes, leave this field blank.

10. Tab to the Payroll field and enter ‘csu b’ for CSU Bi-weekly.
11. Tab to the Assignment Category field. Type ‘T’ for Temporary and press Tab.
12. Save your work.
13. Select the Miscellaneous tab. Enter All/New Hire in the Reason field.

14. Save your work.
15. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose Cancel and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

16. Open the Additional Assignment Details flexfield by clicking in the beermug field.

17. Enter the Appt End Date which is typically set to one year after the hire date.

18. Click OK to close the Additional Assignment Details window.

19. If you made changes, the Choose an Option window will display. Click ‘Correct’.

20. When the Assignment window displays, save your work.
Completing Salary Information

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. Ensure that the hire date appears in the Change Date field.
3. Enter the hourly pay rate in the Change Value field.

   Non-Student Hourly employees in State Classified job classes start at the grade minimum.

4. Save your work and close the Salary window.
5. If you receive the following error message, please close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field.

**Correcting a Salary**

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.
2. Delete the salary record by clicking the red X on the toolbar.
3. Save.
4. Re-enter the Change Date and Change Value.
5. Save your work and close the Salary Administration window.

6. After making any other necessary changes, zoom the assignment for approval.

**Submitting the New Hire for Approval**

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

   ![Zoom Icon]

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

   ![Salary Administration Window]

2. When the following window opens, you may enter Creator Comments and Conditions of Appointment.

   ![OSU Approval Window]

   Press the button below to send this person into the approval process.
Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.

2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy box, click the round button next to Assignment.

4. Save.
5. Enter the following information in the bottom half of the window.
   • GL Account
   • Start Date - the hire date
   • % - percent of the salary to be paid from this account

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

6. Save your work.

7. Close the Schedule Lines and Labor Scheduling windows to return to the CSU Approval window.

8. Click ‘Send into Approval Process’ again.

9. A window appears to notify you that the person has been sent into the approval process. Click ‘OK’. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)
Establishing Funding for the New Hire

**Hiring a Graduate Assistant Employee**

Before entering a new employee 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 hire date in the Effective Date field.**

3. **Enter the new hire’s SSN in the SSN field. Press Tab.**

   If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

   If the person is a contact, the following window will display, click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - Hire date
4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’.

7. 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, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - SSN
   - Hire 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 Employee.

4. Enter the SSN in the Social Security field.

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

5. Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:
   - Full name
   - Date of birth
   - 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-yyy.
2. If applicable, select a value from the Registered Disabled field’s LOV.
Completing Employee Address Information

Employment Tab

1. In the Ethnic Origin field, choose the appropriate value from the LOV if provided by the new employee.

2. The I-9 Status and New Hire fields automatically populate. Do not alter these fields.

3. Complete the Veteran Status field, if applicable, using the LOV.

4. Save your work after making changes to the tabs.

Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

1. From the People window, click the Address button. Complete the Address and Zip Code fields with the employee’s current mailing information. The remaining required fields will be populated when you save.

2. Save your work and close the Address window.
Completing Employee Telephone Information

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 change this date, 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.
Completing the Special Information Table

2. Scroll down, if necessary, and click once in the Name field that you wish to activate.

3. In the lower half of the window, click in the Detail field LOV then press Ctrl-L to open the flexfield. Enter the necessary data.

4. Press enter to return to the Special Information Table. Save your work.

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.

![Emergency Contact Information Window]

Supervisor

1. The employee’s assignment number defaults in the Emp Assgn Number field.

2. Enter part of the supervisor’s name in the Supervisor field and press tab. Select the supervisor from the list that appears.

3. The Supervisor Employee Number field automatically populates with the correct employee number.

4. Press Enter to return to the Special Information window.

5. Save your work.
Completing Assignment Information

An assignment identifies an employee’s job in a department.

If this new employee is being hired on a 9-month appointment and the start date is during the Summer Session (May 16 - August 15), turn now to the section at the end of this unit on creating Summer Session appointments.

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 employee, go to the Assignment screen and continue the hiring process.
   b. Ensure that the Effective Dates From field is populated with the employee’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.
Completing Assignment Information

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 ‘G’ for Graduate Student and press Tab.

6. In the Employee Qualifier field, enter GRA, GSA, or GTA.

7. Press enter to return to the Assignment window.

8. In the Job field, enter 009980.

9. In the Payroll field, enter ‘csu m’ for CSU Monthly.

10. Tab down to the Assignment Category field. Type ‘T’ for Temporary and press Tab.

11. Save your work.

12. Select the Standard Conditions tab. Enter the Working Hours. To confirm that the work hours you entered corresponds with the employee’s %FTE, place your cursor in the Working Hours field and click the Zoom button.

13. Select the Miscellaneous tab. Enter All/New Hire in the Reason field.

14. Save your work.
15. When the Decision window appears, select the appropriate Basis of Service.

16. If you made changes to the Standard Conditions (the Working Hours), a window will appear asking you if you want to use the standard conditions for the new organization. To reset the Working Hours to 40, click ‘OK’. To keep the change you made to the Working Hours field, click ‘Cancel’.

17. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose ‘Cancel’ and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

18. Open the Additional Assignment Details flexfield by clicking in the beermug field.

19. Enter the Appt End Date which will appear on the Graduate Assistant Contract and Certification form. For Graduate Assistants this is usually set to the end of the academic year.

20. Click ‘OK’ to close the Additional Assignment Details flexfield.

21. If you made changes, the Choose an Option popup window displays. Select ‘Correction’.

22. When the Assignment window displays, save your work.

October 22, 2008
Completing Salary Information

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. Enter the hire date in the Change Date field.

3. Enter the annual salary in the Change Value field. The salary must meet the minimum stipend set by the Graduate School.

   This value should be based on full-time status (40 hrs/week) regardless of the employee’s Working Hours and should be a whole-dollar amount.

4. Save your work and close the Salary window.

5. If you receive the following error message, please close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field.

Correcting a Salary

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.

2. Delete the salary record by clicking the red X on the toolbar.

3. Save.
4. Re-enter the Change Date and Change Value.
5. Save your work and close the Salary Administration window.
6. After making any other necessary changes, zoom the assignment for approval.

Submitting the New Hire 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, you may enter Creator Comments and Conditions of Appointment.

3. Click the Send into Approval Process button.
Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.

2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy block, click the round button to the left of Assignment. Save the change.
4. Enter the following information in the bottom half of the window.
   • GL Account
   • Start Date - the hire date
   • % - percent of the salary to be paid from this account

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

5. **Save your work.**

6. **Close the Schedule Lines and Labor Scheduling windows.**

7. When the CSU Approval window appears, click ‘Send into Approval Process’ again.

8. A window appears to notify you that the person has been sent into the approval process. Click ‘OK’. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)

9. Close the Assignment and People windows (or press F4) to return to the Navigator window.
Printing the Graduate Appointment and 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 -> Grad Asst Appt/Cert Form.

3. In Step 1, enter the employee’s hire date.

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

5. Enter the Assignment No. field. A new hire’s assignment number is the same as the employee number.

6. Leave the Item Key field blank. It is used only when printing a Certification Form for an assignment change such as a reappointment.

7. Click ‘Run Report’.

8. After the employee signs and dates it, retain the form at the department level. Do not forward it to Records or the Graduate School.
Hiring a Student Employee

Before entering a new employee 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 hire date in the Effective Date field.

3. Enter the new hire’s SSN in the SSN field. Press Tab.

   If the new hire’s name appears in the list, please turn to Unit 5: Maintaining Employees for instructions on creating a new concurrent assignment.

   If the person is a contact, the following window will display. Click ‘OK’. Email the following information to hrs_data_systems@mail.colostate.edu:
   • Full name
   • Date of birth
   • Hire date
4. If the new hire’s name does not appear in the list, close the window and return to the Navigator screen.

5. Open CSU Maintain Person.

6. When asked if you want to change the effective date, click ‘Yes’. Enter the new hire’s start date and click ‘OK’.

7. 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, as they appear on the Social Security Card. (If you enter a middle initial, do not use a period after the initial.)

If you receive the following message, STOP! Click ‘Cancel’ and close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:

• Full name
• Date of birth
• SSN
• Hire 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 Employee.

4. Enter the SSN in the Social Security field.

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

5. Close the People window. Email the following information to hrs_data_systems@mail.colostate.edu:

• Full name
• Date of birth
• 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-mm-yyyy.
2. If applicable, select a value from the Registered Disabled field's LOV.
3. Save your work.

Completing Employee Address Information

To enter a foreign address for an employee, contact Vivian Maxwell in Payroll at (970) 491-5852.

1. From the People window, click the Address button.
2. Complete the Address and Zip Code fields with the employee’s current mailing information. The remaining required fields will be populated when you save.

3. Save your work and close the Address window.
Completing Employee Telephone Information

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 change this date, 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 Assignment Information

An assignment identifies an employee’s job in a department.
Completing Assignment Information

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 employee, go to the Assignment screen and continue the hiring process.

   b. Ensure that the Effective Dates From field is populated with the employee’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 ‘Stu’ for Student and press Tab.

6. In the Employee Qualifier field select the appropriate entry from the LOV, or type ‘W’ for Work Study or ‘N’ for Non-Work Study.

7. Click the OK button to return to the Assignment window.

8. In the Job field, select the appropriate job from the LOV and click ‘OK’. All student jobs begin with 99.

9. Tab to the Grade field. Type an ‘S’ in the Find field and press Tab.

October 22, 2008
10. Page down through the list until you find the grade with ‘Yes’ in the Valid for grade column.

11. In the Payroll field, type ‘csu b’ for CSU Bi-weekly.

12. Tab to the Assignment Category field and type ‘T’ for Temporary and press Tab.

13. Save your work.

14. A Decision window will appear asking if you want to use the Standard Conditions of the new organization. Choose ‘No’ to ensure that the standard conditions remain at 0 which is correct for hourly employees.

15. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

16. If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose ‘Cancel’ and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.

17. Save your work.
Completing Salary Information

Pay grades and hourly rates associated with individual steps are fixed as defined in the CSU Compensation Plan.

1. From the Assignment window, click the Salary button to open the Salary Administration window.

2. The Change Date field populates with the hire date.

3. Enter the hourly pay rate in the Change Value field.

4. Save your work and close the Salary window.

The Annual Salary amount must fall within the salary range specified in the Grade Salary Limits block.
5. If you receive the following error message, please close the Salary screen without saving. This error means that there is an incorrect value on the Assignment screen, usually in the Payroll, Assignment Category, or Salary Basis field. Review and correct these values and then enter the salary.

Correcting a Salary

An incorrect salary can be corrected before an assignment has been zoomed or after it has been rejected.

1. Open the Salary Administration window from the Assignment window.
2. Delete the salary record by clicking the red X on the toolbar.
3. Save.
4. Re-enter the Change Date and Change Value.
5. Save your work and close the Salary Administration window.
6. After making any other necessary changes, zoom the assignment for approval.

Submitting the New Hire 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, you may enter Creator Comments and Conditions of Appointment.

If a work-study student is being paid by federal funds (SWG), make a note of this in Conditions of Appointment.

3. Click the Send into Approval Process button.

4. When the Labor Scheduling window displays, click the Schedule Lines button.

5. When the following decision box displays, click ‘Yes’.
6. In the Schedule Hierarchy block, click the round button to the left of Assignment. Save the change.

7. Enter the following information in the bottom half of the window.
   • GL Account
   • Start Date - the hire date
   • % - always 0 for hourly employees

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future.

   End-dating a labor schedule for an hourly employee will prevent him from appearing in Hourly Summary Time Entry and from logging time on a timeclock.

8. Save your work.


10. When the CSU Approval window appears, click ‘Send into Approval Process’ again.

11. A popup window displays alerting you that the person has been sent into the approval process. Click ‘OK’.
Hiring a New Summer Session Employee

Hire a graduate assistant on a summer session assignment only if you are certain that he will be given a 9-month assignment for the regular school year. If you are not certain, then hire this graduate assistant on a 12-month assignment.

Before continuing with this section, make sure you have completed the steps outlined in earlier sections of this unit on hiring the new employee (such as completing the People and Address screens) up to the point that you were prompted to turn here for entering data in the Summer Session assignment.

If you have not yet followed the instructions earlier in this unit to begin setting up the new hire, please turn to the page indicated below. You will be referred here to complete the hire.

Faculty and Admin Professionals .......................................................... 3.X
Other Salaried ...................................................................................... 3.X
Graduate Assistant ............................................................................. 3.X

If this employee already has an assignment with CSU, please turn to Unit 6: Summer Session Appointments for instructions on creating a new concurrent assignment.

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 employee, go to the Assignment screen and continue the hiring process.
   b. Ensure that the Effective Dates From field is populated with the employee’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. Press Ctrl-L to open the People Group flexfield. In the Employee Group field, type ‘F’ for Faculty, ‘A’ for Admin Professional, ‘G’ for Graduate Assistant, or ‘O’ for Other Salaried and press Tab.

6. In the Employee Qualifier field select the appropriate qualifier.

7. Press enter to return to the Assignment window.

8. Select the Job from the LOV (this should be the same as the job on his 9-month assignment if he will have one in the fall).

9. Tab to the Payroll field and type ‘csu m’ for CSU Monthly.

9. Enter the Assignment Category field (this should be the same as the job on his 9-month assignment if he will have one in the fall).
10. Save your work.

11. Below the Salary Information tab, choose ‘Summer Session Salary’ from the Salary Basis’s LOV or type ‘Sum’.

12. The Working Hours field in the Standard Conditions tab must remain at 40 for Summer Session assignments. Do not change this field.

13. Save your work.

14. A Caution window will appear asking if you want to use the location of the new organization. Usually, it is appropriate to allow Oracle to enter the default assignment location for the Organization.

15. If the workplace is located off the main campus (i.e., at the Engineering Research Center, in Denver, or in another state) but the default location is on the main campus, choose ‘Cancel’ and enter the Location field from the LOV manually. Failure to do so may cause incorrect taxation for the employee. Save your work again if you entered the location yourself.
Completing Appointment Information

1. Click the Entries button at the bottom of the Assignment screen.

2. In the Element Name field, type ‘Sum’ for Summer Session and press Tab.

3. Click the Entry Values button at the bottom of the screen.

4. Enter the appointment amount in the SS Appt Amount field that corresponds to the month indicated in the next two fields.

5. The SS Start Date and SS End Date fields should span one month of the summer session:
• May 16 - May 31
• June 1 - June 30
• July 1 - July 31
• August 1 - August 15

6. Change the Auto Base Pay Update field if you wish for the employee to receive a retroactive increase for May and June following the salary exercise that runs in July.

7. Save your work.


9. You may enter up to three additional summer session appointments - one for each month of summer session.

10. Close the CSU Department Element View screen after entering all necessary Summer Session lines.

Submitting the New Hire for Approval

1. From the Assignment window, click the Zoom button 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, you may enter Creator Comments and Conditions of Appointment.

3. Click the Send into Approval Process button.
Establishing Funding for the New Hire

1. When the Labor Scheduling window displays, click the Schedule Lines button.

2. When the following decision box displays, click ‘Yes’.

3. In the Schedule Hierarchy block, click the round button to the left of Assignment.

4. Save the change.
5. Enter the following information in the bottom half of the window.
   - GL Account
   - Start Date - the hire date
   - % - percent of the salary to be paid from this account

   The End Date column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. **End-dating a labor schedule does not stop an employee’s pay.** If no account is designated for a certain period, the pay will be charged to the department’s default account.

   If the percentages for any time period add up to less than 100%, the department’s default account will be charged for the remainder of the employee’s pay.

6. Save your work.


8. When the CSU Approval window appears, click ‘Send into Approval Process’ again.

9. A window displays alerting you that the person has been sent into the approval process. Click ‘OK’.

   ![Image of alert window]