Unit 0: Introduction

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Appendix
Summer Session appointments are used to pay only Faculty, Admin Professionals, Graduate Assistants, and Other Salaried Employees who are either on a 9-month appointment or do not work during the academic year for work performed from May 16 through August 15. Use of a Summer Session appointment during the academic year is not allowed.

This unit provides instruction on:

- **Hiring a New Employee for the Summer Session**
- **Obtaining Summer Session Salary Maxima**
- **Creating a New Concurrent Summer Session Assignment**
- **Reactivating an Existing Summer Session Assignment**
- **Viewing Current Summer Session Appointments**
- **Editing a Summer Session Assignment**
- **Summer Session Encumbrances for the Following Fiscal Year**

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**Hiring a New Employee for the Summer Session**

To hire a new employee (someone without employment records in the HR system) on a Summer Session appointment, please turn to Unit 3: Hiring a New Employee.

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**Obtaining Summer Session Salary Maxima**

Summer session earnings are restricted according to the number of summer weeks an employee works. To find out the maximum amount a summer session employee may earn, print a Personnel File Data form - Summer Session as described below.

1. Go to Processes and Reports -> Submit Processes and Reports -> Single Request.

2. The the Name field, type ‘pers’ and press tab. Select Personnel File Data - Summer Session from the LOV that appears.
3. You may specify an employee, if you wish, by entering the Employee Name, Employee ID #, or Assignment number field.

Or you may print PFDs for all of your 9-month employees at once by changing Summer Appointments Only? to No. Leave all other fields blank except for the Date field which populates automatically.

4. Click OK.
5. Click Submit.
6. When the report has completed, click View Output.

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Creating a New Concurrent Summer Session Assignment

To create a Summer Session assignment for a 9-month employee who does not have a summer session assignment in your department for the appropriate people group (ie, faculty or graduate assistant):

1. From the Navigator menu, open CSU New Concurrent Asg/Re-Hire.
2. Enter the Effective Date which is always May 16 of the current year.

3. Enter the employee's last name, employee number, or CSU ID and click the Search for Person button. (If you enter a last name, you may be given a list to choose from.) The remaining fields in Step 2 of this screen will automatically populate.

If the employee cannot be found, he may not be a CSU employee. Refer to the Summer Session section of Unit 3: Hiring a New CSU Employee.

If you are able to find the person, but the Employee No. field does not populate, please contact the Oracle Helpdesk at 491-0946.

4. In the Employee Group field, enter the group for the new assignment. The Employee Group must match the 9-month assignment, but the Employee Qualifier (such as GTA) may differ.

5. In the Payroll field, enter CSU Monthly.

6. Click the Summer Session checkbox.

7. Click the Create Assignment button.

8. If you're creating a new faculty assignment, the following box will prompt you to choose an employment category. This must match the category on the 9-month assignment.
9. If Oracle finds that this employee is active, you will receive the following message. Click OK to continue.

10. When the following window opens, you may:

   Click Yes to complete and zoom the new assignment. You’ll be taken to this employee’s People screen.

   Click No to create a new concurrent assignment for another employee. The CSU New Concurrent Asg/Re-Hire will clear so you may create another new concurrent assignment.

11. If you clicked yes, the People screen will open. Verify the Effective Date and change it if necessary.

12. The People window displays the employee's personal information. Verify all biographical information including the tabs, Additional Personal Details Flexfield (beermug), and the Address, Phones, and Special Information buttons at the bottom of the screen.

   Any changes you make here change this data for all departments in which the employee holds an active assignment.

   If information is added to the Special Info -> Creator Comments or Conditions of Appointment sections, the Start Date of these comments must be the same as the hire date in order for them appear on the approval notification.

   If the employee is being paid from a 13 fund, please note in Creator Comments whether this appointment is for teaching, research, or administration. If it is for teaching, include the course number.

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

15. Enter the Job and ensure that the Job and Assignment Category match the 9-month assignment.

16. When the following screen appears, select Correction.

17. Correct the Location if the actual workplace is located off the main campus (i.e., the Engineering Research Center, Denver, or another state). Failure to do so may cause incorrect taxation for the employee.

18. Select the Salary Information tab in the middle of the screen. Ensure that the Salary Basis is set to “Summer Session Salary”.

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19. Select the Standard Conditions tab. The Working Hours should always be 40 for a Summer Session assignment.

20. If the employee works during the summer session only (i.e., does not have a 9-month assignment), please populate the SS FTE Salary field in the Assignment screen.

21. Save your work.

22. Do not enter a salary for summer session assignments.

23. Click the Entries button at the bottom of the screen.

24. In the Element Name column, type ‘sum’ and press Tab to create a Summer Session element.

You’ll need one element for each month that the employee works during the summer: May, June, July, and/or August.
25. Click the Entry Values button. Enter the:
   • SS Appt Amount - the amount to be paid during the period indicated below
   • SS Start Date - the first day of the summer session month (ie, 16-May, 1-Aug)
   • SS End Date - the last day of the summer session month indicated above (ie, 31-May, 15-Aug)
   • Auto Base Pay Update - The Auto Base Pay Update field controls whether the appointment is eligible for a retroactive salary increase. Setting this flag to Y for an appointment will apply the salary increase, which is normally effective on August 16, to summer appointments occurring between May 16 and June 30.

26. Save your work and close the Entry Values screen.

27. Close the CSU Department Element View screen.
28. Click the Zoom button on the toolbar.

29. You may enter Creator Comments and Conditions of Appointment, if needed.

30. When the Labor Scheduling window displays, select the Summer Session assignment and click Schedule Lines.

31. When the following window displays, click Yes.
32. In the Schedule Hierarchy block, click the round button to the left of Assignment. Save the change.

33. Enter the following information in the bottom half of the window.
   - GL Account
   - Start Date
   - % - percent of the salary to be paid from this account. If the percentage is less than 100 for any period, the remainder of the employee’s pay will be charged to the department’s default 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.

34. Save your work.

35. Close the Schedule Lines and Labor Distribution windows to return to the CSU Approval window.

36. When the CSU Approval window appears, click Send into Approval Process again.

37. 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.)

38. Close the Assignment and People windows (or press F4) to return to the Navigator window.
If a Summer Session assignment exists from a previous year, it must be reactivated. If the employee’s organization has changed, please create a new concurrent assignment according to the previous section.

1. To reactivate the assignment, open CSU Maintain Person from the Navigator menu.

2. When asked if you want to change the effective date, click No. The effective date will be set for you later.

3. In the Find Person window enter the employee’s last name, employee number, or CSU ID and click Find.
4. From the People screen, click the Assignment button. Use the up- and down-arrows to locate the summer session assignment in “End Summer Session” status.

5. Click the Zoom button to access the CSU Assignment Changes screen.

6. The form automatically sets the effective date to May 16 of the current year.
7. The Status field automatically updates to Active Assignment. The Assignment Changes form also updates the People Group, Qualifier, Job, and Employment Category fields to match the 9-month assignment. For Graduate Assistants, the Qualifier may differ from the 9-month assignment.

8. In the Summer Sessions Earnings section, you may enter up to seven appointments. Enter the following information.

- Start Date
- End Date
- Appt Amount - This amount will be evenly distributed over the working days of this appointment.
- ABPU (Auto Base Pay Update) - Check this box if this appointment is eligible to receive a retroactive salary increase, normally effective July 1.

9. If the employee is being paid from a 13 fund, please note in Creator Comments whether this appointment is for teaching, research, or administration. If it is for teaching, include the course number.

10. Review the account information in the Funding section. Click the Update button if this information is out of date. You’ll be taken to the Labor Distribution screen. Please refer to Unit 7 for additional information.
11. Choose the summer session assignment and then click Schedule Lines. Edit the funding as necessary.

In order for an employee to be paid correctly on a reactivated summer session assignment, THE START DATE MUST BE MAY 1 OF THE CURRENT YEAR!

A Start Date of May 1 will not cause the employee to be overpaid. But a Start Date of May 16 will cause half of the employee’s May pay to be charged to the department’s default account.

12. If you would like for this employee's summer salary to encumber for the following summer session, leave the end date blank. If you do not want to see estimated encumbrances for the following May and June, enter end date of 31-Aug of the current year.

13. Save your changes.


15. After reviewing the changes, you may print this window by selecting File > Print.

16. Click Send into Approval Process.

17. Click OK when the following window appears.
18. Close the CSU Assignment Changes screen.

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

**Viewing Current Summer Session Appointments**

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

![Image of CSU Maintain Person window](image)

2. Set the effective date to May 16 or later.

![Image of effective date dialog box](image)

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

![Image of Find Person window](image)
4. Click the Assignment button.

5. When the Assignment screen opens, select the Summer Session assignment using the up- and down-arrows.

6. Click the Entry History button.

7. In the Classification field, type ‘ea’ and hit tab. Earnings will fill in.

8. Leave the From field blank. In the To field, make sure the date is set to May 16 of the current year or later.

9. Place your cursor in the Element Name field and press ctrl-F11. A list of current and past Summer Session Earnings Elements displays.
10. To view the details of an appointment, select it and then click Entry Values.

If the employee has more than one appointment, you may scroll through them without closing the following screen by using the up- and down-arrows.

**Editing a Summer Session Assignment**

Changes to summer session assignments are described below. These instructions apply to all active summer assignments.

Any new hires for the summer session which start on any other day must be changed using a Personnel File Data form.

1. From the Navigator menu, open CSU Maintain Person.
2. When asked if you want to change the effective date, click No. It will be set for you later.

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

4. Click the Assignment button.

5. When the Assignment screen opens, find the Summer Session assignment using the up- and down-arrows.

6. Click the Zoom button to open CSU Assignment Changes.

7. The current information displays.
8. You may make the following changes to a Summer Session assignment. Please refer to step 9 for additional information on certain situations.

- **Add an appointment** - Enter the information for a new appointment on the first blank line in the Summer Session Earnings section.

- **Delete an appointment** - Check the Delete? box beside the appointment you want to delete.

- **Edit an appointment** - Change the Start Date, End Date, Amount, or ABPU flag on any existing appointment. If this is a retroactive change, make a note of it in Creator Comments.

9. Changes such as the following must be made in the manner described:

- **Increase or reduce the amount of an appointment BEFORE it has been processed by Payroll** - Edit the Amount field on the Assignment Change form.

- **Increase the amount of an appointment AFTER it has been processed by Payroll when the amount is to be paid over the remainder of the appointment** - Create a new appointment for the additional amount to be paid using the same dates as the original appointment.

- **Increase the amount of an appointment AFTER it has been processed by Payroll when the amount is to be paid over the entire appointment** - Edit the appointment amount on the Assignment Changes screen and include an explanation in Creator Comments.

- **Reduce the amount of an appointment AFTER it has been processed by Payroll** - Edit the appointment amount on the Assignment Changes screen and include an explanation in Creator Comments.

10. Enter any necessary Creator Comments (required for retroactive changes to pay).

11. Click Send into Approval Process.

12. When the following window opens, click OK.

13. Close the CSU Assignment Changes screen.
**Summer Session Encumbrances for the Following Fiscal Year**

HR users now have the option of allowing summer session encumbrances to calculate for the following May and June to assist in financial planning.

If the employee’s summer session assignment has active funding through the end of the fiscal year, encumbrances will calculate based on the %FTE paid during the previous fiscal year’s May and June. The charges will be applied to the active account(s) on the labor schedule.

To prevent encumbrances from calculating, simply end-date the funding effective August 31.