

# Colorado State University

## Human Resource Management System User Guide

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Unit 1: HRMS Basics

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Unit 2: DateTracking

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Unit 3: Hiring a New Employee

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Unit 4: Electronic Approvals

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Unit 5: Maintaining Existing Employees

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Unit 6: Summer Session Appointments

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Unit 7: Labor Scheduling

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Unit 8: Time Entry and Timeclocks

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Unit 9: Performance Evaluation Module

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### **Unit 10: Leave Module**

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Unit 11: User Reports

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Unit 12: Associates

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Appendix

# Unit 10: Leave Module

This unit provides instruction on:

Entering Leave Taken . . . . . 10.1

Adjusting Entries from Previous Batches. . . . . 10.4

Correcting Validation Errors. . . . . 10.5

Leave Reports . . . . . 10.7

Importing Leave . . . . .

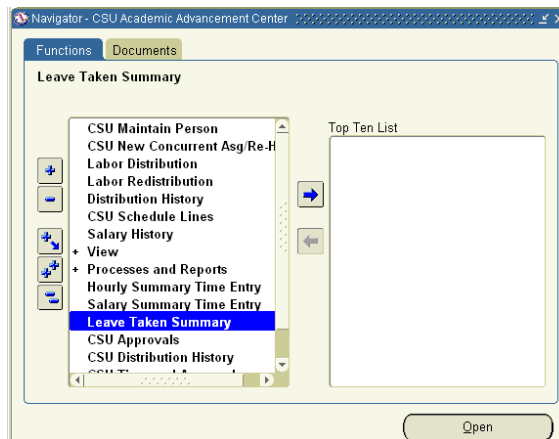
## Entering Leave Taken

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

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

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

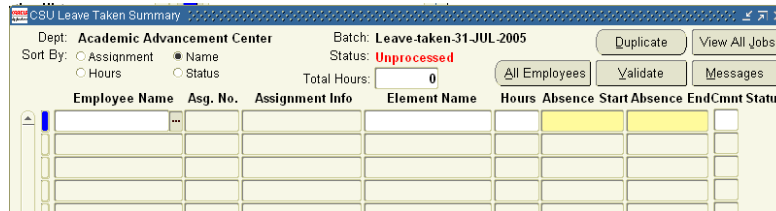
1. From the Navigator screen, open the Leave Taken Summary.



2. The **Batch** field at the top of this screen indicates the month for which leave should be entered to keep leave records as current as possible.

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

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



3. You may add employees to your batch in the following ways:
  - a. Type the employee's last name in the **Employee Name** field and press **Tab**. The next two fields will populate automatically.
  - b. Click the **All Employees** button. One blank line will be added for all leave eligible employees in your department. Unused lines will be deleted when you validate the batch.
  - c. Click on an employee already in the batch and click the **Duplicate** button.
4. In the **Element Name** field, click the **LOV** button to choose the appropriate element from the list. Elements for **State Classified** employees begin with "SC" and elements for **Faculty and Admin Professionals** begin with "FAP".
  - **AL Reduce Taken** - Use this element to **reduce** the number hours taken in a **previous** batch. This element requires that a comment be entered. Please state the date of the absence that you are reducing.  
To adjust the number hours taken in the **current** batch, simply edit or delete the entry.
  - **AL Taken** - Use this element to indicate the number of annual leave hours used.
  - **SL Reduce Taken** - Use this element to **reduce** the number hours taken in a **previous** batch. This element requires that a comment be entered. Please state the date of the absence that you are reducing.  
To adjust the number hours taken in the **current** batch, simply edit or delete the entry.
  - **SL Taken** - Use this element to indicate the number of sick leave hours used.
  - **FMLA** - Use this element to record the number of hours an employee has been out of the office for reasons that qualify under FMLA. **This element does not affect leave balances**; it is an informational element.
    - If an employee was out for 8 hours on sick leave that qualified as FMLA, you must enter an **SL Leave Taken** element for 8 hours **and** an **FMLA** element for 8 hours.
    - If an employee is out on **LWOP** that qualifies as FMLA, record the appropriate number of FMLA hours in the leave module.

5. Enter the Absence Start and Absence End dates. You may press Ctrl-L or click the LOV button to open the calendar.

CSU Leave Taken Summary

Dept: Academic Advancement Center Batch: Leave-taken-31-JAN-2006 Status: Unprocessed

Sort By:  Assignment  Name  Hours  Status Total Hours: 0

Buttons: Import, Duplicate, View All Lines, All Employees, Validate, Messages

Employee Name	Asg. No.	Assignment Info	Element Name	Hours	Absence Start	Absence End	Cmnt	Status
Adams, Aaron	22652-2	Admin Assistant II	SC AL Taken	8	23-DEC-2005	23-DEC-2005		

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

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

Editor

Beth was scheduled to be out of the office for the entire week, but returned after two days.

Buttons: OK, Cancel, Search

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

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

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

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

CSU Leave Taken Summary

Dept: Academic Advancement Center Batch: Leave-taken-31-JAN-2006 Status: Unprocessed

Sort By:  Assignment  Name  Hours  Status Total Hours: 44

Buttons: Import, Duplicate, View All Lines, All Employees, Validate, Messages

Employee Name	Asg. No.	Assignment Info	Element Name	Hours	Absence Start	Absence End	Cmnt	Status
Adams, Aaron	22652-2	Admin Assistant II	SC AL Taken	8	23-DEC-2005	23-DEC-2005		
Bergen, Beth	9662	Counselor	FAP AL Reduce Tak	24	18-NOV-2005	20-NOV-2005	Bet	
Carver, Cathy	23520	Director	FAP SL Taken	12	03-JAN-2006	04-JAN-2006	Thi	

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

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

9. Click Validate.

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

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

HRMSR290 Colorado State University  
Human Resources Management System  
Leave Entry Report PAGE 1  
01/19/2006 12:45 pm

Organization: Academic Advancement Center Type/Period: Leave-taken-31-JAN-2006

Employee Name	Assignment	Element Name	Hours	Absence Start	Absence End
Adams, Aaron	22652-2	SC AL Taken	8	23-DEC-2005	23-DEC-2005
Bergen, Beth	9662	FAP AL Reduce Taken	24	18-NOV-2005	20-NOV-2005
Beth was scheduled to be out of the office for the entire week, but returned after two days.					
Carver, Cathy	23520	FAP SL Taken	12	03-JAN-2006	04-JAN-2006
This SL qualifies as FMLA.					

## Adjusting Entries from Previous Batches

### Reducing the Amount of Leave Taken

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

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

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

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

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

#### Original Entry:

The screenshot shows a web-based report titled "CSU Leave Taken Summary". It includes a header with department and batch information, sorting options, and a table of leave entries. The entry for Henry Hanson shows 8 hours of leave taken on 01-JUL-2005.

Employee Name	Asg. No.	Assignment Info	Element Name	Hours	Absence Start	Absence End	EndCmnt	Status
Hanson, Henry	17510	Coordinator	FAP AL Taken	8	01-JUL-2005	01-JUL-2005		V

### Correcting Entry and Required Comments:

The screenshot shows two windows from a software application. The top window is titled "CSU Leave Taken Summary" and displays a table of leave data for an employee named Henry Hanson. The table has columns for Employee Name, Asg. No., Assignment Info, Element Name, Hours, Absence Start, Absence End, Cmnt, and Status. The data row shows: Hanson, Henry | 17510 | Coordinator | FAP AL Reduce Tak | 2 | 01-JUL-2005 | 01-JUL-2005 | On | V. Above the table, there are fields for Dept (Academic Advancement Center), Batch (Leave-taken-31-AUG-2005), Status (Valid), and Total Hours (3). There are also buttons for Import, Duplicate, View All Jobs, All Employees, Validate, and Messages. The bottom window is titled "Editor" and contains a text area with the text: "On July 1, Henry was out of the office for only 6 hours instead of 8." Below the text area are buttons for OK, Cancel, and Search.

### Reducing the Number of FML Hours Used

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

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

## Correcting Validation Errors

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

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

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

Please email the error message to [hrs\\_data\\_systems@mail.colostate.edu](mailto:hrs_data_systems@mail.colostate.edu).

2. **“The hours in this batch will cause the balance to fall below zero. This is not allowed. Please contact HR. Current balance (excluding this batch) is: XX.”**
  - Check the employee’s Leave Balances report to ensure that the leave was not previously entered.
  - Confirm that the employee’s monthly accrual is correct in the HR System.
  - Remember that a month’s accrual is not available for use until the first of the **following** month.

- Email hr\_records@mail.colostate.edu for assistance.

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

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

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

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

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

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

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

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

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

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

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## Leave Reports

### Leave Entry Report

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

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

- 1. Open Processes and Reports -> Find Requests -> Specific Requests.**

2. In the Name field, type "Leave Entry%".
3. It may be necessary to adjust the number appearing in the Select the Number of Days to View field. This value defaults to 7.
4. Click 'Find'. The most current Leave Entry Report will be at the top of this list.
5. Click 'View Output'. When it opens in Adobe Acrobat, you may print it or save it.

To print the report for any month:

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

HRMSR290

Colorado State University  
Human Resources Management System  
Leave Entry Report

PAGE 1  
01/19/2006 12:45 pm

Organization: Academic Advancement Center      Type/Period: Leave-taken-31-JAN-2006

Employee Name	Assignment	Element Name	Hours	Absence Start	Absence End
Adams, Aaron	22652-2	SC AL Taken	8	23-DEC-2005	23-DEC-2005
Bergen, Beth	9662	FAP AL Reduce Taken	24	18-NOV-2005	20-NOV-2005
Beth was scheduled to be out of the office for the entire week, but returned after two days.					
Carver, Cathy	23520	FAP SL Taken	12	03-JAN-2006	04-JAN-2006
This SL qualifies as FMLA.					



**Leave Summary Report**

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

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

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

HRMSR289		Colorado State University				Page 1			
Academic Advancement Center		Summary of Employee Leave Balances as of July 1, 2005				Print Date: 04.11.2005			
		Sick Leave				Annual Leave			
Name:	Asg#:	Beg Balance	Earned	Taken	Available	Beg Balance	Earned	Taken	Available
Arthur, Abby	22981	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Avery, Anthony	19732	10.00	0.00	0.00	10.00	16.00	0.00	0.00	16.00

### Leave Balances Report

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

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

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

# Leave Reports

10.10

HRMSR289

Colorado State University  
Employee Leave Balances for FY06  
Reflected in system as of June 30, 2006

Page 1  
Run Date 06-JUN-2006

Hartshorn Health Services

Name: Annual Leave Cap: 384 Hours  
Title:  
Asg#:  
Service Date: 02 Oct 1995  
FTE: 0.78 (Full-time = 1.00, Hourly = 0.00)  
Group: Admin Professional  
Supervisor:

Sick Leave					Annual Leave					FMLA	
	Earned	Taken	Bal Hrs	Bal Days		Earned	Taken	Bal Hrs	Bal Days		Hours
Begin Balance			38.00	4.75	Begin Balance			0.00	0.00		
July	7.80	0.00	45.80	5.73	July	12.48	0.00	12.48	1.56	July	0.00
August	7.80	8.00	45.60	5.70	August	12.48	12.48	12.48	1.56	August	0.00
September	7.80	8.00	45.40	5.68	September	12.48	0.00	24.96	3.12	September	8.00
October	7.80	16.00	37.20	4.65	October	12.48	12.00	25.44	3.18	October	0.00
November	7.80	28.00	17.00	2.13	November	12.48	0.00	37.92	4.74	November	14.00
December	6.24	14.00	9.24	1.16	December	9.36	21.60	25.68	3.21	December	0.00
January	7.80	0.00	17.04	2.13	January	12.48	5.50	32.66	4.08	January	0.00
February	7.80	15.48	9.36	1.17	February	12.48	32.66	12.48	1.56	February	0.00
March	6.24	0.00	15.60	1.95	March	9.36	5.50	16.34	2.04	March	0.00
April	4.68	0.00	20.28	2.54	April	6.24	0.00	22.58	2.82	April	0.00
May	7.80	0.00	28.08	3.51	May	12.48	0.00	35.06	4.38	May	0.00
June	0.00	0.00	28.08	3.51	June	0.00	0.00	35.06	4.38	June	0.00
YTD Totals	79.56	89.48	28.08	3.51	YTD Totals	124.80	89.74	35.06	4.38	YTD Totals	22.00

Date	Entry	Hours	Reason	Date	Entry	Hours	Reason
31 Dec 2005	Sick Leave Earned	-1.56	LWOP Hours Adjustment	31 Dec 2005	Annual Leave Earned	-3.12	LWOP Hours Adjustment
31 Mar 2006	Sick Leave Earned	-1.56	LWOP Hours Adjustment	31 Mar 2006	Annual Leave Earned	-3.12	LWOP Hours Adjustment
				30 Apr 2006	Annual Leave Earned	-3.12	LWOP Hours Adjustment

Leave earned in a month is automatically added to the leave balance(s) on the first working day of the following month.

Generally, leave taken during a month is reflected in the system by the 15th of the following month, providing the employing department(s) report leave usage in the system in an accurate and timely manner.

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