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Completing Assignment Information

An assignment identifies an employee’s job and accompanying details (department, salary, job classification, etc.).

Follow the steps below to enter assignment information for a new hire or to create a new assignment for an existing employee.

**New Hire:**
Click on the ‘Assignment’ button on the Departmental Person/Assignment Form after entering the personal data of the new employee (see Hiring a New Employee User Guide). See page 5 for instructions on entering assignment information for a new hire.

**New Concurrent Assignment:**
A new concurrent assignment is needed when an employee changes Employee Groups (i.e. State Classified to Admin Professional) or to give an existing employee a new job in a department.

**NOTE:** If an employee is moving to another department and staying in the same employee group (i.e. employee is currently a State Classified employee in Housing and Dining and is moving to Admissions as a State Classified employee), you would transfer the current assignment using the CSU Initiate Assgn Transfer menu option instead of creating a new concurrent assignment.

An employee should not exceed 1 FTE (40 working hours per week) combining all active assignments held at the University. Be particularly careful of employees who are eligible for overtime payment, as this may be costly for the department.

Select the CSU New Concurrent Asg/Re-Hire option from the Navigator menu to create a new assignment for an existing employee.
Enter the start date of the new assignment in the **Effective Date** field in the date format of dd-mmm-yyyy (01-JAN-2020).

Enter the employee’s Social Security number (including dashes) or the employee’s CSU ID number and click the ‘Search for person’ button. The employee’s Full Name, Date of Birth, Employee No., and CSU ID information will be displayed. Verify this information to ensure you have the correct employee.

Select the appropriate **Employee Group** from the List of Values (LOV).

**NOTE:** A student can only have one work-study assignment. Oracle will prevent you from creating a second work-study assignment. You will receive a message “Student already has Work Study Assignment” if you select Student.Work Study for the Employee Group and the employee already has an active or suspended work-study assignment. If you receive the message “Student already has Work Study Assignment”, close the **New Concurrent Asg/Re-Hire** form, select **Maintain Person** and check for an existing work-study assignment. If you cannot find this employee using **Maintain Person**, the work-study assignment is currently listed under another department and you will need to transfer the work-study assignment to your department using the **CSU Initiate Assgn Transfer** menu option.
Select the appropriate **Payroll** value for the Employee Group.

**Admin Professional Salaried, Faculty, State Classified Salaried, Other Salaried** and **Graduate Student**
select ‘CSU Monthly Payroll’

**Non-Student Hourly, Student, State Classified Hourly** and **Admin Professional Hourly**
select ‘CSU Bi-Weekly Payroll’

Click the ‘Create Assignment’ button.

You may be prompted to select a Salary Basis – select ‘12 Month’ or ‘9 Month’ depending on the Employee Group chosen. You may also be prompted to select an Employment Category – select ‘Regular’, ‘Special’, or ‘Temporary’. See page 10 for additional Employment Category/Assignment Category information.
Completing Assignment Information
User Guide

A message will display indicating “This person is an employee and will get a new concurrent assignment” or “This person is an Ex-employee and will be rehired”.

Click ‘OK’

Oracle will create the new assignment and display the message “A new Concurrent Assignment has been created. Would you like to continue with this employee through CSU Maintain Person?”

If you click ‘Yes’ the Departmental Person/Assignment Form will be displayed. The Decision window will appear with the effective date displayed and ask if you want to change it. The date displayed should be the same date that you entered as the Effective Date on the New Concurrent Asg/Re-Hire form. Click ‘No’ in the Decision window if the correct date is displayed.

The employee’s information will be displayed on the Departmental Person/Assignment Form. You can update the address, phone numbers and special information as needed.

If you click ‘No’ when asked if you would like to continue with this employee through CSU Maintain Person, the New Concurrent Asg/Re-Hire form will be cleared and you may create another new concurrent assignment for another employee.

NOTE: If you clicked ‘No’ when asked if you would like to continue with this employee through CSU Maintain Person, a new concurrent assignment was created for the employee and the assignment information can be completed at a later time. If you do not need the assignment you created – please contact HR_IS@mail.colostate.edu to have them purge the new assignment.

Click the ‘Assignment’ button on the Departmental Person/Assignment Form. The employee’s current primary assignment will be displayed. Use the ‘PgDn’ or ‘down arrow’ button to locate the new concurrent assignment that was just created.

New Hire and Concurrent Assignment information

When the Assignment form displays, confirm two things:

Ensure that the Organization field is populated with the correct department name and the Effective Dates From field is populated with the employee’s hire date or the correct start date for the assignment.

New Hire:

If the department is not correct, close the Assignment and Departmental Person/Assignment forms. If you are asked if you want to ‘Save’ your changes, click ‘No’. Switch to the correct department responsibility and then select CSU Maintain Person from the Navigator menu. Select the correct date when the Decision window asks if you want to change the current date. Once you have found your employee, click the ‘Assignment’ button and continue entering your assignment information.
Completing Assignment Information
User Guide

If the incorrect Start Date was saved, email the following information to hr_is@mail.colostate.edu prior to sending the records into the approval process:

- Full name
- Employee number
- Correct start date

Example of a New Hire Assignment:

New Concurrent Assignment:

The Group, Payroll, Assignment Category, and Salary Basis information will be populated on the new assignment from the information you entered on the New Concurrent Asg/Re-Hire form. Verify this information is correct.

If the Effective Date (start date) of your new assignment is not correct, close the Assignment and Departmental Person/Assignment forms and email the following information to hr_is@mail.colostate.edu:

- Full Name
- Assignment Number
The Effective Date of a new concurrent assignment cannot be changed. HRIS will delete the assignment. You will then need to create a new concurrent assignment with the correct start date.

**Example of a New Concurrent Assignment:**

![Assignment Form](image)

**New Hire:**

Tab to the **Group** field.

If the ‘Choose an Option’ window appears, click ‘Correction’. Always select ‘Correction’ (and not ‘Update’) when editing a new hire record or a new assignment.

Open the Group flexfield by pressing ‘Ctrl-L’ or clicking the LOV [...] button.

The **People Group Flexfield** form will open.
Select the correct **Employee Group** by pressing ‘Ctrl-L’ or click on the LOV [...] button.

<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Professional</td>
<td>Administrative Professional</td>
</tr>
<tr>
<td>Associate</td>
<td>Associate</td>
</tr>
<tr>
<td>Faculty</td>
<td>Faculty</td>
</tr>
<tr>
<td>Graduate Assistant</td>
<td>GTA, GRA, or GSA</td>
</tr>
<tr>
<td>Non-Student Hourly</td>
<td>Non-Student Hourly</td>
</tr>
<tr>
<td>Other Salaried Employee</td>
<td>Post Doc, Intern, Vet Resident,</td>
</tr>
<tr>
<td>State Classified</td>
<td>State Classified (salaried or</td>
</tr>
<tr>
<td>Student</td>
<td>hourly)</td>
</tr>
<tr>
<td>Student</td>
<td>Student Hourly (not Graduate</td>
</tr>
<tr>
<td></td>
<td>Assistant)</td>
</tr>
</tbody>
</table>

In the **Employee Qualifier** field select the appropriate value from the LOV

- **Admin Professional** and **Faculty** select either
  - Non-Federal or Federal

- **Student** select either
  - Non-Work Study or Work Study

- **Graduate Student** select either
  - GRA Graduate Research Assistant
  - GRA Predoc Graduate Research Assistant Predoc
  - GSA Graduate Support Assistant
  - GTA Graduate Teaching Assistant

- **State Classified, Other Salaried** and **Non-Student Hourly**
  - Non-Federal

**New Hire & New Concurrent Assignment:**

All Administrative Professional, Faculty and State Classified assignments must have a unique position number.

Enter the position number for this assignment in the **Position** field.

If the ‘Choose and Option’ window appears, click ‘Correction’. Always select ‘Correction’ when editing a new assignment.

Click ‘Yes’ if the following message (“You have selected a different position...”) appears.
The Job classification associated with the Position will automatically update the Job field when the position number is entered in the Position field.

**Job:**

If this assignment does not require a Position number or the Job does not automatically populate from the Position number, enter the 6-digit job classification in the Job field or choose a job from the LOV.

- **Graduate Assistants** – enter 009980
- **Other Salaried** – select the appropriate Job from the LOV or enter from the list below.
  - 009930 – Clinical Psychology Intern
  - 009940 – Veterinary Intern
  - 009960 – Veterinary Clinician
  - 009970 – CVMBS Summer Researcher
  - 009990 – Postdoctoral Fellow
  - 009992 – FGT Postdoctoral Fellow

- **Student** – all student jobs begin with 99. A list of valid job classifications and grades for Student employees can be found on the Career Center website in the [Student Employment Handbook](#).

- **Non-Student Hourly** – A list of valid Non-Student Hourly job codes can be found here [Non-Student Hourly Job Classifications](#). Non-Student Hourly assignments cannot use a student job classification.

**Grade:**

- **Admin Professional, Faculty, Other Salaried and Graduate Students** – do not have a Grade
State Classified – Enter the first letter of the job code (from the Job field) and press the ‘Tab’ key. Scroll down until you find the grade with a ‘Yes’ in the ‘Valid for Job’ column.

Non-Student Hourly – Grades do not apply to non-classified job classes. If using a State Classified job code for a Non-Student Hourly assignment, enter the first letter of the Job code (from the Job field) and press the ‘Tab’ key for a list of valid Grades. Otherwise leave the Grade field blank.

Students – The Grade should populate after entering the Job Classification in the Job field. A list of valid job classifications and grades for Student employees can be found on the Career Center website in the Student Employment Handbook.

Payroll:

Admin Professional Salaried, Faculty, State Classified Salaried, Other Salaried and Graduate Student
select ‘CSU Monthly Payroll’

Non-Student Hourly, Student, State Classified Hourly and Admin Professional Hourly
select ‘CSU Bi-Weekly Payroll’

Assignment Category:

Faculty and Salaried Admin Professional – select ‘Regular’, ‘Special’, or ‘Temporary’
For tenured or tenure-track Faculty, choose ‘Regular’.
For Adjunct Faculty, choose ‘Temporary’.
For either Continuing or Contract Faculty, choose ‘Special’.

State Classified – select ‘Regular’

Hourly Admin Professional – select ‘Temporary’

Other Salaried – select ‘Temporary’
Non-Student Hourly – select ‘Temporary’
Graduate Student – select ‘Temporary’
Student – select ‘Temporary’

Salary Information Tab

Salary Basis

Faculty and Admin Professional – select ‘Regular 12 Month Salaried’, ‘Regular 9 Month’ or ‘AP Hourly’ (if this is an Hourly Bi-Weekly employee)

State Classified – select ‘State Classified Hourly’ for an Hourly Bi-Weekly employee or ‘State Classified Reg Sal’ for a Monthly employee

Non-Student Hourly – select ‘Non-Student Hourly’

Graduate Student – select ‘Regular 12 Month Salaried’ or ‘Regular 9 Month’

Student – select ‘Student Hourly’

Supervisor Tab

A supervisor is required for all assignments. The supervisor is entered as Last Name, First Name (Doe, John). You can enter the first part of the supervisor’s last name in the Name field and press the ‘Tab’ key.

Select the supervisor from the list that appears.
Standards Conditions Tab

**Working Hours**

- Hourly employees – 0
- Full-time Monthly employees – 40
- Part-time Monthly employees – calculate the Working Hours using the following example
  - Example: Working Hours would be 10 for a monthly employee with a 25% FTE (40 * .25 = 10)

To confirm that the Working Hours you entered corresponds with the employee’s FTE, place your cursor in the **Working Hours** field and click the ‘Zoom’ icon.

**Miscellaneous tab**

**Reason**

- **New Hire:**
  
  Select ‘All/New Hire’ from the LOV

- **New Concurrent Assignment:**
  
  Select ‘All/New Concurrent Assignment’ from the LOV

Click ‘Save’.
If you made changes to the Working Hours field on the Standard Conditions tab, a Decision window will appear asking “Do you want to use the standard conditions for the new position or organization?” To reset the Working Hours to 40, click ‘Yes’. To keep the changes you made to the Working Hours field, click ‘No’.

A Caution window may appear asking if you want to use the location of the new position or the new organization. Usually, it is appropriate to allow Oracle to enter the default Organization (department) location for the assignment. Otherwise, you can click ‘Cancel’ and click in the Location field and select a location from the LOV.

If the workplace is in a location other than the main campus (i.e. in Denver or in another state) but the default location for the department is on the main campus, choose ‘Cancel’ and click in the Location field and select a location from the LOV.

Failure to select the correct location may cause incorrect taxation for the employee.

Click ‘Save’.
Additional Assignment Details

The Appointment End Date (Appt End Date) and the Continuing, Contract, and Adjunct Faculty Appointment Type (CCA Faculty Appt Type) fields are located on the Additional Assignment Details form. To open the Additional Assignment Details form, click in the ‘Beer Mug’ field in the lower right corner of the Assignment form.

The Appt End Date should be completed in the following cases:

- Temporary, salaried appointments must have an end date which may be no more than two years from the start date of the appointment.
• Pre-tenure Faculty appointments must have an end date. It is typically set to the end of the academic year for 9-month employees and June 30th for 12-month employees. An end date will remain on their assignment until they are awarded tenure.

• Special appointments may or may not have an end date depending on the Employee Group and the Employment Category, see below for details.

  o **Admin Professional** – Regular No Appointment End Date
  o **Admin Professional** – Special Appointment End Date recommended
  o **Admin Professional** – Temporary Appointment End Date required; up to 2 years
  o **Faculty** – Tenured No Appointment End Date
  o **Faculty** – Pre-tenure Appointment End Date required
  o **Faculty** – Temporary Adjunct Appointment End Date required
  o **Faculty** – Special Contract Appointment End Date required; corresponds with their contract
  o **Faculty** – Special Continuing No Appointment End Date
  o **Other Salaried**
    • Postdoctoral Fellow Appointment End Date required; up to 3 years
    • Fellowship Grant Trainee Appointment End Date required; from 3 to 5 years
    • Veterinary Resident Appointment End Date required; up to 3 years
    • Veterinary Intern Appointment End Date required; 1 year
    • Clinical Psychology Intern Appointment End Date required; 1 year
  o **Graduate Assistants** Appointment End Date required
  o **Non-Student Hourly (NSH)** No Appointment End Date
  o **Student** No Appointment End Date

The **CCA Faculty Appt Type** must be completed for all non-tenure track Faculty assignments (Instructor, Master Instructor, Senior Instructor, and non-tenure track Assistant Professor, Associate Professor, and Professor classifications).

Please note, the Temporary/Special employment categories no longer represent actual appointment types for CCA Faculty but are required in Oracle for benefits determination.

Click ‘OK’ to close the **Additional Assignment Details** form.

If the ‘Choose an Option’ window appears, click ‘Correction’.

When the **Assignment** form displays, click ‘Save’.
Completing Salary Information

From the Assignment form, click the ‘Salary’ button to open the Salary Administration form.

Ensure that the hire date or the start date of the assignment appears in the Change Date field of the Salary Proposal section.

Salaried employees:

Enter the annual salary in the New 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.

*Example of entering an Annual Monthly Salary:*

![Salary Administration form](image)

The Change Value and Annual Salary fields will be updated after you enter the New Value amount and press the ‘Tab’ key. The Annual Salary must fall within the Min Salary and Max Salary specified in the Grade Salary Limits for all assignments with a Salary Grade.

Hourly employees:

Enter the hourly pay rate in the New Value field. When you press the ‘Tab’ key the Annual Salary will be calculated. The Annual Salary must fall within the Min Salary and Max Salary specified in the Grade Salary Limits for Student employees. Non-Student Hourly employees do not have a Grade salary range unless you are using a State Classified Job classification.
Example of entering an Hourly Rate:

Graduate Assistant salaries must meet the minimum stipend set by the Graduate School.

Click ‘Save’ and close the Salary Administration form.

If you receive the error message, “This assignment is not eligible for the salary element”, close the Salary Administration form without saving. This error indicates an incorrect value on the Assignment form in either the Payroll, Assignment Category, or Salary Basis field.

In the example below, the Assignment Category field is blank. Select the correct Assignment Category value and click ‘Save’. You will also receive this error if Monthly Payroll is selected in the Payroll field and an Hourly salary basis is selected in the Salary Basis field.

Click the ‘Salary’ button and enter your salary information.
Completing Assignment Information
User Guide

HUMAN RESOURCES

Correcting a Salary

A salary can be corrected before an assignment has been ‘zoomed’ (sent into the approval process) or after an assignment has been rejected. To correct a salary:

1. Click on the ‘Salary’ button on the Assignment form to open the Salary Administration form.
2. Delete the salary record by clicking the red X icon in the toolbar.
3. Click ‘Save’.
4. Close the Salary Administration form.
5. Click on the ‘Salary’ button.
6. Enter the correct salary in the Change Value field.
7. Click ‘Save’ and close the Salary Administration form.

Submitting the New Assignment for Approval

When all the assignment details have been entered and saved, from the Assignment form, click the Zoom icon in the toolbar.

If the following Note window appears, move your cursor to any field other than the Working Hours field on the Assignment form and then click the ‘Zoom’ icon again.

When the CSU Approval form opens, you may enter Creator Comments and Conditions of Appointment.

Non-Student Hourly:

Enter the Posting Number from the Talent Management System (TMS) in the Creator Comments.

Student:

Enter the Handshake job posting number in the Creator Comments.
Example of Creator Comments and Conditions of Appointment:

Click the ‘Send for Approval Process’ button.

Establishing Funding for the New Hire or a New Assignment

New Hire:

When the Labor Scheduling form displays, you should only see one assignment in the Assignment No. section. The assignment should be selected which is indicated by the blue square to the left of the assignment.

New Concurrent Assignment:

When the Labor Scheduling form displays, you may see several assignments in the Assignment No. section. Select the line with the assignment number of the new assignment that you created. This should be the highest assignment number. In the example below our new assignment is the 28-2 assignment. Select this assignment by clicking in the assignment number field of the 28-2 assignment.

Click the ‘Schedule Lines’ button.
When the following **Decision** box displays, click ‘Yes’.

![Decision Window]

The **Schedule Lines** form will display.

In the Schedule Hierarchy block in the upper right corner of the **Schedule Lines** form, click the ‘round button’ next to ‘Assignment’.

Click ‘Save’ to save the Schedule Hierarchy.
Enter the following information in the bottom half of the **Schedule Lines** form.

- GL Account
- Start Date – this must match the hire date or the start date of the new concurrent assignment
- % - 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 account 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.

**Salaried Employees:**

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. Cell Phone Allowances entered using the Special Earnings form can be charged to an account other than the employee’s salary account(s). The account(s) that can be selected in the Special Earnings batch must be included on the employee’s assignment Schedule Lines. If the Cell Phone Allowance is to be charged to an account that is not the employee’s salary account(s), you would enter the account with a 0% on the assignment Schedule Lines. In the example below, the employee’s salary will be charged 100% to account 1355220. The 1355240 account with the 0% could be selected on the Special Earnings form for the Cell Phone Allowance.
Hourly Employees:

Hourly employees are paid according to the accounts associated with the projects they clock into using the TimeClock Plus system. All accounts associated with timeclock projects that the hourly assignment will use should be listed on the Schedule Lines form. Special payment types that are not associated with a project in TimeClock Plus will be charged directly to the account(s) on the assignment’s Schedule Lines. Therefore the accounts listed on the Schedule Lines for hourly employees should list percentages that sum to 100% and will be considered a ‘default’ labor distribution for any changes not directly attributed to a project. Special payment types or Job Codes in TimeClock Plus that are not associated with a project include Jury Duty and Sick Leave. These special payment types are charged directly to the accounts listed on the assignments Schedule Lines.

The Schedule Lines for an hourly employee might look similar to the entries below. Jury Duty or Sick Leave would be charged evenly between the two accounts listed with the 50% percentages. If an hourly assignment includes an account(s) that need to be associated with a project but should not be charged for special payment types such as Jury Duty or Sick Leave, the accounts would need to be listed on the assignment Schedule Lines to associate with a project in TimeClock Plus but would be listed with a 0%. The employee in this example would be able to clock time on projects associated with any of the four accounts listed below, but the 6010100 and 1190101 accounts would not be charged for Jury Duty or Sick Leave.

Click ‘Save’.

Close the Schedule Lines and Labor Scheduling forms.
When the **CSU Approval** form appears, click the ‘Send into Approval Process’ button again.

A Forms window appears to notify you that the assignment has been sent into the approval process. Click ‘OK’.

Close the **Assignment** and **Departmental Person/Assignment Form** (or press F4) to return to the Navigator menu.