Human Capital Management: Step-by-Step Guide

My Leave for HCM Community Members

My Leave is a time keeping system available to all departments and to all four campuses. All university employees can access My Leave through the employee portal.

My Leave provides the following features:

- Tracks all types of employees:
  - Monthly salaried – exempt, non-exempt employees and faculty
  - Bi-weekly - hourly student and temporary employees
  - Bi-weekly - salaried employees
  - Essential Services Employees

- Displays leave balances
- Contains a built-in approval workflow for supervisors

My Leave is integrated with HCM Position data, Job data, and CU Time.

The following fields from Position data feed to an employee’s Job Information and then to My Leave.

- Reports to position number – The person in this position is the approver in My Leave.
- FLSA Status – exempt or non-exempt for overtime calculations.
- Standard Hours – Used by My Leave to calculate Additional Time Straight, XRG hours, Overtime coded OTM, and Comp Time Earned coded CME for non-exempt employees.

Job data will take Position data fields (plus two additional fields) and feed information to My Leave

<table>
<thead>
<tr>
<th>Position Data</th>
<th>Job Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must be changed in position</td>
<td>• Pay Group</td>
</tr>
<tr>
<td></td>
<td>• Hourly / Salary</td>
</tr>
<tr>
<td></td>
<td>• Reports To</td>
</tr>
<tr>
<td></td>
<td>• Standard Hours</td>
</tr>
<tr>
<td></td>
<td>• FLSA Status</td>
</tr>
</tbody>
</table>

Job data information comes from the position, except for Pay Group and hourly or salaried.

If Position data and Job data do not agree, the Update Job Data option was turned off in Position data. This can be corrected by creating a position change with the Update Job Data option turned on.

When changes are made in Position and Job, they are automatically reflected in My Leave.
Essential Services Employees

Essential Services Employees are defined in the Non-Person Profile under Additional Duties. Vacation and sick hours add to the work hours in the week for these employees, and overtime is paid when the sum of all hours is over 40 for the standard week. The Essential Services check box will be selected in My Leave on the Timesheet view. In the CU HCM User WorkCenter there is a query for all Essential Services Designees.

Timesheet View – My Leave

Non Person Profile – Essential Services Employee

Before you start your department on My Leave, review your department set up for all required fields in My Leave using the Dept Personnel & Org Roster report. The report is located in the CU User Workstation – Resources tab Dept Personnel & Org Roster Report # 11. This reports shows all your employees’ pay group, FLSA status, record number, position number, reports to and supervisor name and employee ID.

All of your employees should have a Reports to supervisor for the approvals process. If the Reports to position is vacant, the timesheets will self-approve.
Getting Started - Setting Preferences and Submitting Time

All of your employees, including supervisors/approvers, will need to Set up Preferences in My Leave in order to use and approve time sheets.

To set your preferences in My Leave:

1. From the portal, open My Leave using one of the following options:
   - Click Request Leave/Record Time from the My Leave tile:

   ![Request Leave/Record Time](image)

   - From the NavBar, click CU Resources > My Info and Pay > My Leave.

The first time you log into My Leave, you will see the My Leave Preferences page with a message containing a link a user's guide for My Leave. [https://www.cu.edu/docs/sbs-myleave-setting-preferences-submitting-time](https://www.cu.edu/docs/sbs-myleave-setting-preferences-submitting-time)
2. Click **OK** to close the message.
3. If you are new to My Leave, start by clicking **Select Email Notifications**. Then complete setting up the My Leave Preferences by setting your work schedule, My Leave start date, and Holiday Schedule and email preferences.

**Important Reminder:** You must set up your preferences before entering any time into My Leave.

### Setting up Preferences

1. Select the correct holiday schedule based on your campus. If you are employed in a position that is not paid holidays (such as students), select **No Holiday Schedule**.

2. From the **Overtime/Comp Time Eligible** list, select an option. If you are in a non-exempt position, select whether you receive compensatory time or paid overtime. If you are in an exempt position and not eligible for comp or overtime, select Not Applicable. Students are overtime eligible but are not normally scheduled to work overtime and should select Overtime.
3. Enter your **Start Date**. If you are a new employee, enter your hire date as your start date. This will tell My Leave when to start tracking time. If you are a rehired employee, the My Leave start date can be changed to your current rehired date.

If you are a CU employee, but new to My Leave, your start date is the date for My Leave to start tracking your time. For example, if you have been an employee since 01/01/2008 but you have never used My Leave before and your department has decided that your department will start using My Leave with the 12/1/2017 pay period your start date is 12/1/2018. On your Preferences tab, you would enter 12/01/2017.

4. The **Weekly Schedule** should be set for **Standard Week**.

5. The **Week Begin Day** for the university is Sunday, except for UCCS where it is Saturday.

6. In the scheduling grid, enter your set schedule. You can set up the weekly schedule to reflect the normal hours you work. Setting up this schedule lets you add time to My Leave using the Add Time button for a range of dates.

7. From the email triggers grid, select the activities for which you would like to receive messages, both as an employee and as a Supervisor.

8. Click **Save & Return** for your changes or additions to take effect.
My Leave has a calendar view that allows you to easily add time.

### Entering Time on Your Calendar

To add an event on your calendar:

1. If you have a set schedule and it has been entered in your preferences, you can press the **Add Time** button and mark you time for a range of dates. If you do not have a set schedule, click the date that you worked, and you can add an event to the individual day.

2. To use the Add Time option click **Add Time** to the right of the Current date or double-click the specific date from the calendar. The Add/Edit Event window appears and you may enter time for a range of dates if you have set up your schedule in Preferences.

3. Update the **From Date** and **To Date** to record the days/hours of hours worked or leave you are requesting and adjust the time (if a partial day) if needed.

4. Select **Include Lunch** if the time you entered includes lunch. If not, deselect this box.

5. If you have multiple jobs, select the correct job number and **Reporting To** (supervisor) to ensure your hours are recorded correctly.
6. Select the **Earnings Code** for Regular Earnings Salary, Regular Hours or exception time being reported from the dropdown. Examples of exception time include vacation, sick, funeral leave and jury duty.

   ![Earnings Code]

7. Select the **Status** from the drop down. This includes the option of Submit a Request or Taken. Vacation time is subject to approval and you would submit a request. Sick time can be submitted as requested or marked as taken. Vacation time **should not be listed as not submitted**.

   ![Status]

8. In **Description** box, type an explanation, if necessary.

   ![Description]

9. Do not enter anything in **SpeedType** unless you have been advised by your HCM Community Member (payroll liaison) or supervisor.

   ![SpeedType]

10. Select **Save** to submit your reported action.

   ![Save]

When you return to the calendar, you see the submitted approved requests and the days marked as worked or holidays taken.

![Calendar]

**Exempt Employees**

Exempt employees only enter and submit exception time. Examples of exception time include, vacation, sick, funeral leave and jury duty. After you submit a request for exception time, an email will be sent to your supervisor for approval. Vacation time will need to be submitted for approval and cannot be marked as taken until approved. Sick time can be marked as taken or submitted for approval.
Non-Exempt Employees and Students

Non-exempt employees must enter and submit all days and hours worked in the pay period. This includes regular hours worked and exception time. Examples of exception time include, vacation, sick, funeral leave and jury duty. The following is a sample of a Non-exempt employee monthly calendar.

Non-Exempt University Staff Full Time should record all hours worked as Regular Earnings Salary or the earnings code of RGS. If you worked additional hours over 40 hours a week My Leave will automatically calculate overtime and additional time straight. If you are a non-exempt employee and receive comp time instead of overtime you would also record all hours worked as Regular Earnings Salary and My Leave will calculate any additional time straight and compensatory time earned.

Non-Exempt University Staff Less Than 100% should record all hours worked as Regular Earnings Salary or the code RGS. My Leave will look at the standard hours in job data and then add XRG hours if hours are recorded over the standard hours. An example would be if an employee is set to work 20 standard hours a week and then recorded that they worked 23 hours Regular Earnings Salary My Leave would add three XRG (Add'l Regular Hours) to the time sheet to be sent for additional pay.

Temporary hourly employees should record all hours worked as Regular Earnings. The earnings code for temporary employees is REG.

Student Hourly employees should record all hours worked as Student Hourly. The earnings code for students is STH.

The earnings codes for Shift Hours should only be used on instruction of your department payroll administrator.
Submit Timesheet at the End of the Pay Period

At the end of the pay period all employees using My Leave will need to review and submit their time sheet. Using the Calendar View, review all hours recorded, then click the Timesheet tab.

1. Select Timesheet at the top of the page.

The timesheet displays a week-by-week snapshot of the hours you reported on the Calendar tab. If the pay period ends in the middle of the week, it is possible that some overtime hours will be carried over to the next pay cycle. Weekly Adjustments are listed for each week and time is split into Regular Earnings Salary, Vacation, Sick, and Overtime or Additional Regular hours.

At the bottom of the timesheet, a summary of the hours for the pay period is listed along with the hours that will be submitted to HCM for pay. All hours should be reviewed carefully to make sure they are correct. If you see a DK1 (or dock) listed, your pay will be docked for the number of hours listed.
2. Once you agree with what is reported on your timesheet, select the certification check box.

![Certification Image]

3. Click **Submit** to submit your timesheet for review and approval by your supervisor.

   If you have errors on the timesheet before it is approved, you can select the option to cancel and rebuild. This would allow you to make changes, recertify and submit.

   If errors are discovered after a timesheet is posted but before payroll department users may deny the timesheet so that the employee may make changes and resubmit.

**Additional Views of My Leave Calendar**

**Calendar - Weekly View**

![Weekly Calendar Image]

**Calendar - Daily View**

![Daily Calendar Image]
Additional Tips For Completing and Submitting Time

- Non-exempt monthly employees should submit a timesheet to your supervisor by the 5th of each month. Bi-weekly employees should check with your department.
- If you submit a request for leave prior to the event and have not seen an email approving/denying your request, follow-up with your supervisor.
- Add your personal email on the preferences tab if you do not use your work email regularly.
- Supervisors – set up a designate for approvals if you are unable to approve timesheets.
- If you see a DK1 in the summary, this means a dock and you will be missing money from your pay! If you worked the entire month or had enough exception time to cover your time off, you do not want to see this! Review each week in your timesheet to find the Dock, go to your calendar tab to correct.

Comp Time and Overtime

Overtime Pay: FLSA requires that an employee in an FLSA non-exempt (eligible for overtime) position is paid overtime or granted compensatory time when hours worked exceed 40 hours in a scheduled workweek. Both overtime and compensatory time must be paid at a rate of not less than one and one-half hours for each hour of overtime/compensatory time worked.

- State personnel rules consider all work time for overtime calculation, excluding holidays and authorized paid leaves such as annual leave, sick leave, jury duty, funeral leave, administrative leave, etc. For example, an employee works 36 hours, takes 4 hours of vacation leave, and then works 4 additional hours. This employee is paid 44 hours at the regular rate of pay, since the total hours at work are equal to 40.
- When you physically work over 40 hours in a week, record the hours as Regular Earnings Salary. My Leave will calculate your comp time/overtime. If you worked 44 hours in one week My Leave will calculate 4 hours of OTM or Overtime.
- Comp time is currently tracked manually within your department.
Navigating to My Leave and Acting on Behalf of Employees

1. From the portal, click **Request Leave/Record Time**.

   ![Request Leave/Record Time](image)

   Across the top of the page, you will have the same options to view your personal calendar. An additional tab labelled **Department Employees** lets you act on behalf of employees within your department.

   ![Calendar Tabs](image)

2. To edit an employee’s calendar, select the **Department Employees** tab.

3. Enter the employee ID that you would like to view.

4. Select **View Calendar**. From this tab you can view and edit employees’ time worked or leave events on the calendar. In addition, you can submit the employee’s timesheet. You will receive a notification warning that you are making changes to another employee’s calendar.

   ![Notification](image)

5. Click **View My Calendar** to return to your personal My Leave calendar.
Using My Leave to Load Timesheets to CU Time

Approved Timesheets must be loaded to CU Time and approved using CU Department Timesheet Review.

1. **Navigation:** Main Menu > CU Time > CU Department Timesheet Review.

   ![CU Department Timesheet Review](image)

2. Select the **Compensation Frequency, Pay Period End Date** and **Department**.

   The system lists all employees, both exempt and non-exempt, as described by your search criteria. The payment status for these two groups of employees may differ depending on what is being reported.

3. Review the listing of employee timesheets and their status. Select the box by the employees’ name if the timesheets are ready to load and select load to CU Time.

   The following table lists Payment Statuses and definitions for both exempt and non-exempt employees.

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Payment Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt</td>
<td>Not Created</td>
<td>The employee has not submitted the timesheet but there is time to be reported. PPLs can use the Auto Create Function for exempt employees.</td>
</tr>
<tr>
<td>Exempt</td>
<td>No Exception time to Load</td>
<td>Employee only has RGS (reg hours salary) to report and this is not pulled into CU Time.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Ready To Load</td>
<td>The supervisor has approved employee’s submitted timesheet.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Requested</td>
<td>The employee has submitted the timesheet/exception time and the supervisor needs to take action.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Posted</td>
<td>The timesheet has been pulled into CU Time.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Denied</td>
<td>The supervisor or department user has denied the employee’s submitted timesheet.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Not Submitted</td>
<td>There is nothing to report. If you use the Auto Create function and this status does not change, it is because this exempt employee has nothing to report.</td>
</tr>
<tr>
<td>Non-Exempt</td>
<td>No Exception time to Load</td>
<td>Employee only has RGS (regular hours salary) to report and this is not pulled into CU Time. This also includes if the employee does not have OT/ or docks to process.</td>
</tr>
<tr>
<td>Non-Exempt</td>
<td>Requested</td>
<td>The employee has submitted the timesheet and the supervisor needs to take action.</td>
</tr>
<tr>
<td>Non-Exempt</td>
<td>Approved/ Denied</td>
<td>The supervisor has approved or denied the employee's submitted timesheet and it is ready to be posted to CU Time.</td>
</tr>
<tr>
<td>Non-Exempt</td>
<td>Posted</td>
<td>The timesheet has been pulled into CU Time.</td>
</tr>
</tbody>
</table>
There are many options that you can use listed at the bottom of the CU Department Timesheet Review page:

- **Auto-Create OT Exempt Time Sheets** – As the department payroll administrator you can use this function to pull in exception time for exempt employees who do not have a submitted and approved timesheet. Auto-Create only works for exempt employees and will pull in vacation and sick approved time from the My Leave Calendar View.

- **Select All / Deselect All** – You can do a single action, but for multiple employees by using this function.

- **Employee Alert / Manager Alert** – You can use this function to notify the employee or supervisor that an action is required. Send an email reminder to approve timesheets or that they are due.

- **Load to CU Time** – As the department payroll administrator, you use this function to load the approved timesheet information to CU Time. All timesheets must be loaded to CU Time every pay period unless they have no time to report.

- **Deny Timesheet** – If a timesheet from My Leave is in Posted status, payroll has not processed yet and an employee needs to make edits to his or her timesheet, you can select this option to send it back to the employee to edit and resubmit.

### My Leave Reports

The following reports are listed in the CU User Work Center that can be used to manage My Leave and CU Time.

- **Query 10 Department Organization** – This report is run by department and will list employees and who they report to.

- **Query 11 Dept Personnel Dept & Org Roster** – This report is run by a Job Code or department. The report includes all the information on the Department Organization report and adds Pay Status, FLSA, % Time, Pay Group and email address.

- **Query 45 My Leave Calendar View** – This report can be run by a range of dates and returns information on the My Leave Calendar View for an employee or a department. This report can be used to audit time if an employee has missed submitting time sheets or changed the calendar after approvals.

- **Query 47 My Leave Timesheet Detail** – This report does not do what is described. Will list all in and out by day without a summary total.

- **Query 48 My Leave Timesheets** – This report looks like the CU Dept Timesheet Review but can be run after the pay period has closed. Lists all timesheets for a department and the status.

- **Query 49 My Leave Timesheet not submitted** – This report would be used to search for timesheets for active employees who have not submitted for a pay period end date.
Additional Reports Used to Audit Leave and Time Entry

- **CU Leave Accrual Summary** is accessed by go to Benefits in HCM and then CU Leave Accrual Summary. All leave earned, taken and adjusted is listed by pay period end date.

- **Query 77 Time Entry Report** – This report should be run to audit entries in CU Time that will be sent for payroll processing prior to the time entry deadline. The report lists all time entries by earnings dates.

- **Query 23 Essential Services Designees** – Listing of all essential services employees.

### Assigning a Proxy and Reassigning Work

HCM Community members have access to set a proxy for a supervisor and reassign timesheets and leave requests submitted prior to the setting of the proxy.

1. **Navigation:** Main Menu > Smart Solutions > Smart Workflow > Workflow Admin > Assign Proxy and Reassign Work.

2. Select the User ID of the supervisor for whom you are setting the proxy.

   ![Search by UserID](image)

   The system displays the page where you can set the proxy and reassign previously submitted requests. This page should only be used for Leave approval and Timesheet requests.

3. Select the User ID of who will be the proxy. You can have the same person for both timesheet and leave requests. Or have one for each. Refer to the Adding a Proxy Step-by-Step Guide for more information.

   **Note:** HCM runs a security process four times a day that picks up the proxy settings; therefore, the person you saved as the proxy may not have immediate access through the portal.
To reassign requests previously submitted, add the User ID to the pending inbox reflecting an entry and click **Reassign**. This will move all timesheets to the new supervisor.

**Admin Approval Inbox**

A department user may need to reassign timesheets on a one-by-one basis or for a pay period. The Admin Approval Inbox will let you select the transaction type such as CU Timesheet Approval or CU Leave Approval. The next option would be to look for the employee by name or employee id then you may approve, deny, or reassign just this employee. You can use the look up (magnifying glass) to look up the employee’s approver operator ID.

**Tips to Help HCM Community Members**

A My Leave Frequently Asked Question guide is available on the Employee Services website.  

[https://www.cu.edu/docs/my-leave](https://www.cu.edu/docs/my-leave)