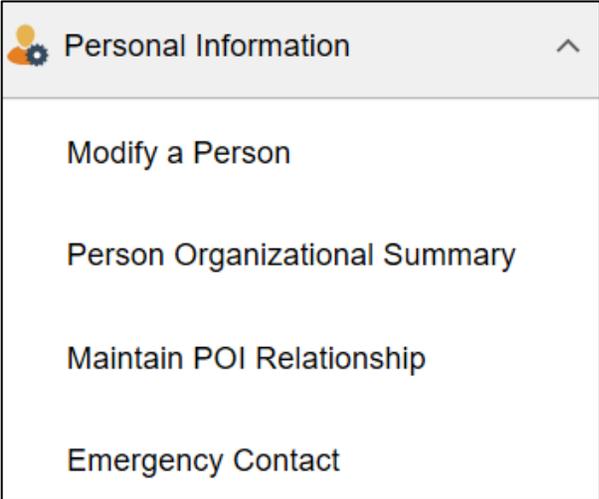
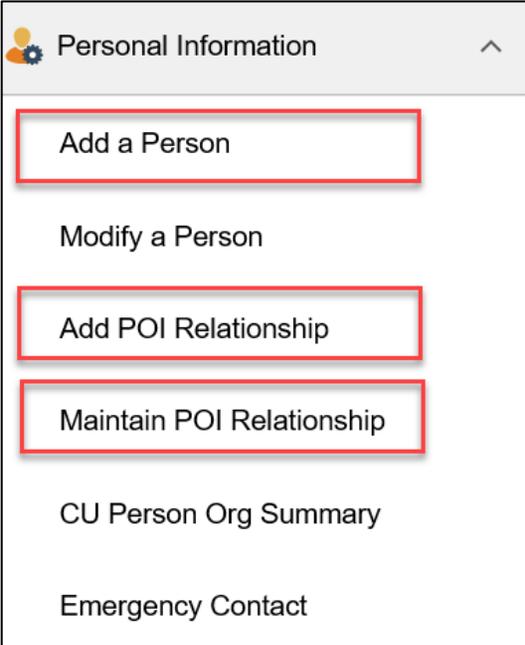


| Current | ➔ | Future |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | |  |
| <p style="text-align: center;">Maintain POIs</p> <p>POIs maintained through Non-Pay Actions> Personal Information> Maintain POI Relationship</p> | | <p style="text-align: center;">Add POI Types and Maintain POIs</p> <p>Add POI types and maintain POI exit date and sponsors through Organizational Relationships</p> <ul style="list-style-type: none"> • HCM Community Users> Non-Pay Actions> Personal Information> Add POI Relationship • HCM Community Users> Non-Pay Actions> Personal Information> Maintain POI Relationship |

In the Future: Add a Person

Biographical Details | Contact Information | Regional | CU Personal Data | CU Personal Data I9 | Organizational Relationships

Person ID NEW

Name Find | View All First 1 of 1 Last

*Effective Date 03/05/2018
*Format Type English
Display Name Add Name

Biographic Information

Date of Birth Years 0 Months 0
Birth Country USA United States
Birth State
Birth Location Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date 03/05/2018
*Gender Unknown
*Highest Education Level A-Not Indicated
*Marital Status Unknown As of
Language Code
Alternate ID
 Full-Time Student

National ID Personalize | Find | View All First 1 of 1 Last

| *Country | *National ID Type | National ID | Primary ID |
|----------|------------------------|-------------|-------------------------------------|
| USA | Social Security Number | | <input checked="" type="checkbox"/> |

Save Notify Refresh Add Update/Display Include History

Tabs:

- **Biographical Details:** Name, Date of Birth, and other personal information.
- **Contact Information:** Addresses and phone numbers.
- **Regional:** Optional tab for Ethnic Group, Military Status, if applicable.
- **CU Personal Data:** Background check information, if applicable.
- **CU Personal Data I9:** Social Security Number and indicator for U.S. Citizen or Legal Permanent Resident. (Required for Security and Pre-Employment POIs without an SSN.)
- **Organizational Relationships:** Business Unit, Department, Sponsor and planned exit date.

In the Future

Before you add a person, run CUES_HCM_JOB_LIST query to make sure person is not already in the system. If a person already exists, the Empl ID field provides a Related Content link that lets you view action and reason codes to determine whether to continue adding the person.

The system prevents you from adding a POI instance to an existing employee who is not eligible for rehire.

Do not make up SSNs. Allow the system to provide a default value of XXX-XX-XXXX.

After you save, the system assigns a Person ID (same as Empl ID).

Transfer Employee – Current vs. Future

| Current | ➔ | Future | | | | | | | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--|-----------------------------------------------------------------------------------------------------|---|---------------------------------------------------------------------------------------------------------|---|-------------------------------------------------------------------------------------------------------|---|---------------------------------------------------------------------------------------------------------|---|-----------------------------------------------------------------------------------------------------------|---|-------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------------|--|
| <p style="text-align: center;">ePAR Transfer</p> <div data-bbox="207 355 711 534" style="border: 1px solid blue; padding: 5px; margin: 10px auto; width: fit-content;">  <p>ePAR Transfer Transfer from one Department to Another Add Modify Inquiry Release</p> </div> <p>Three-stage process using pay action ePAR Transfer:</p> <ol style="list-style-type: none"> 1. Initiate Request. 2. Retrieve, review and approve transfer request (Release employee). 3. Requestor updates transaction and Submits for approval. | ➔ | <p style="text-align: center;">Transfer Employee Template Based Transaction (TBT)</p> <p>Similar to the ePAR, TBTs are configured to offer streamlined data entry by reducing the current data entry process through the Personal Data and Job Data pages.</p> <p>Gaining department submits one transaction.</p> <p>When selecting employee, requestor can select from entire campus or another campus.</p> <p>Related content lets you view current job data of the transferring employee.</p> <p>Upon approval, job data is updated and the Initiator and employee are notified via email.</p> <div data-bbox="1272 769 1694 1351" style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e0f2f1;"> <th colspan="2" style="text-align: left; padding: 5px;">Document Collection</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"> Job Information</td> <td style="text-align: right; padding: 5px;">▼</td> </tr> <tr> <td style="padding: 5px;"> Position Management</td> <td style="text-align: right; padding: 5px;">▼</td> </tr> <tr> <td style="padding: 5px;"> Time Collection</td> <td style="text-align: right; padding: 5px;">▼</td> </tr> <tr> <td style="padding: 5px;"> Employee Pay Data</td> <td style="text-align: right; padding: 5px;">▼</td> </tr> <tr> <td style="padding: 5px;"> CU PETs and Funding</td> <td style="text-align: right; padding: 5px;">▼</td> </tr> <tr style="border: 2px solid red;"> <td style="padding: 5px;"> Template Based Transactions</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;"> Transaction Status</td> <td style="padding: 5px;"></td> </tr> </tbody> </table> </div> | Document Collection | |  Job Information | ▼ |  Position Management | ▼ |  Time Collection | ▼ |  Employee Pay Data | ▼ |  CU PETs and Funding | ▼ |  Template Based Transactions | |  Transaction Status | |
| Document Collection | | | | | | | | | | | | | | | | | | |
|  Job Information | ▼ | | | | | | | | | | | | | | | | | |
|  Position Management | ▼ | | | | | | | | | | | | | | | | | |
|  Time Collection | ▼ | | | | | | | | | | | | | | | | | |
|  Employee Pay Data | ▼ | | | | | | | | | | | | | | | | | |
|  CU PETs and Funding | ▼ | | | | | | | | | | | | | | | | | |
|  Template Based Transactions | | | | | | | | | | | | | | | | | | |
|  Transaction Status | | | | | | | | | | | | | | | | | | |

In the Future: Transfer Employee Template Based Transaction

Template Based Transactions SIED000017 Database: HCMSP2 Home Search Menu Refresh

Related Content | New Window | Help | Personalize Page

Template Based Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type

Select Template

Transaction Type

Transactions in Progress ?

You do not have any transactions in progress.

Go To [Transaction Status](#)

Select Template and click **Create Transaction**. There will be a Transfer template and a Transfer into New Contract Position template.

In the Future: Display Related Content

Template Based Transactions

SIED000017 Database: HCMSP2

Home Search Menu Refresh

Related Content | New Window | Help | Personalize Page

Template Based Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type All

Select Template

Transaction Type All

Transactions in Progress ?

You do not have any transactions in progress.

Go To [Transaction Status](#)

Choose an option and enter search parameters to view more information about a position.

Manage Transactions query lets you access the Manage Hire Details page, from which you can view the template.

In the Future: Enter Transaction Information

| | | |
|-------------------------------------------------------------|----------------------------------------------------------|---------------------------------------|
| Position - Job Info | | |
| Work Location - Position Data | | |
| *Position Number <input type="text"/> | Description <input type="text"/> | |
| Job Information - Status | | |
| Regular/Temporary <input type="text"/> | Full/Part Time <input type="text"/> | |
| Job Information - Employee Classification | | |
| Employee Classification <input type="text"/> | | |
| Job Information - United States | | |
| FLSA Status <input type="text"/> | | |
| Job - Payroll Information | | |
| *Pay Group <input type="text"/> | *Employee Type <input type="text"/> | |
| Job Compensation - Payroll Currency and Frequency | | |
| *Compensation Frequency <input type="text"/> | | |
| Job Compensation - Pay Components | | |
| *Comp Rate Code <input type="text"/> | *Compensation Rate <input type="text" value="0.000001"/> | |
| *Compensation Frequency <input type="text"/> | | |
| Job Compensation - Pay Components - 2 | | |
| Comp Rate Code <input type="text"/> | Compensation Rate <input type="text"/> | |
| Compensation Frequency <input type="text"/> | | |
| Job Compensation - Pay Components - 3 | | |
| Comp Rate Code <input type="text"/> | Compensation Rate <input type="text"/> | |
| Compensation Frequency <input type="text"/> | | |
| Employment - Additional Data | | |
| Appointment End Date <input type="text"/> | | |
| Comments | | |
| Comments <input type="text"/> | | |
| Return to Enter Transaction Details Page | | |
| <input type="button" value="Save and Submit"/> | <input type="button" value="Save for Later"/> | <input type="button" value="Cancel"/> |
| <input type="button" value="Save and Submit for Approval"/> | | |

The position should already be prepared, including funding information.

You can enter additional pay components, if needed.

Save and Submit to forward the request for approval.

Once approved, the system sends you and the employee an email notification.

In the Future: View Transaction Status

| Select | Transaction Type | Effective Date | Transaction Status | Name | Person ID | Action |
|--------------------------|------------------------------|----------------|--------------------|------|-----------|--------|
| <input type="checkbox"/> | Change Personal and Job Data | 02/28/2018 | Action Required | | | |
| <input type="checkbox"/> | Change Personal and Job Data | 03/05/2018 | Action Required | | | |

Select All Deselect All

Delete Selected Transactions

Actions
View Approval Chain

Right-click the Related Actions indicator  to see where your transaction is in the approval process.

View Approval Chain

TBT Transaction Approval Status

Request ID 5307 Request Status Hired
Template 10 Template Action Required
Sequence Status

Transfer Approval

HIRE_REQUEST_ID=5307:Approved

Campus = Systems (USYS)

Approved

Frakes, Ashley Marie
University Staff
03/01/18 - 1:36 PM

Save Cancel Return to Search Notify