

Human Capital Management: Job Aid

Transaction Pages and Action Reasons

What is a transaction page?

A transaction page is an online form that incorporates several data changes needed for a specific action. Instead of entering information in Job Data and Personal Information, a transaction page collects all relevant information and, once approved, sends it to the correct data fields in HCM. Transaction pages also allow for multiple actions in one row, instead of entering multiple rows for the same action. For example, one transaction can have a job code change, a compensation change and an end date change.

What are actions and action reasons?

Transactions are driven by the action code and action reason code. An action code identifies and records an activity, or change, to a record. The action reason code identifies the reason for the action. These codes combine to tell HCM which people should be notified to review the transaction for approval. Transactions that require approval, before being sent to data fields in HCM, fall into two groups: those that affect pay and those that don't affect pay.

What transactions use which action reasons?

HCM has multiple transaction pages. The following tables are a guide for when to use certain transaction pages, and include the definition to assist in determining which Action/Reason to use.

Pay Actions

Pay Actions include the following:

- ePAR Additional Pay
- ePAR Non-Person Profile (NPP)
- ePAR Pay Rate Change

ePAR Actions	Action	Action Reason	Reason Definition	Notes
ePAR Additional Pay	Additional Pay	One Time Payment	To make a one-time payment to an employee. Examples include Bonus, Award, and Additional Pay Flat amounts.	An end date is needed when completing the transaction.
		Recurring Payment	To make a non-base building recurring payment to an employee over more than one pay period. Examples include Supplemental payments, Administrative Stipends and Temporary Pay Differentials.	
ePAR Non-Person Profile (NPP)	Position Change	Vacant Position	To prepare a position for a new incumbent that is currently vacant that may or may not be fed to CU Careers for recruiting.	
ePAR Pay Rate Change	Data Change	Demotion	Used to move an employee into a different jobcode with reduced duties and potentially reduced pay.	
		Promotion	Used when an individual takes on additional duties with an increase in responsibilities and a potential increase in pay (same job family).	
		Temp to Permanent	Used to move a person into a Permanent (regular) position who currently holds a Temporary position.	
		To Classified	Used to move a person into a Classified Staff position from another job family.	
		To Faculty	Used to move a person into a Faculty position from another job family.	
		To Student	Used to move a person into a Student position from another job family.	
		To University Staff	Used to move a person into a University Staff position from another job family.	
	Pay Rate Change	Base Pay -Decrease In Pay	Used when employee stays in current position/title and pay is reduced (e.g., loss of grant funding).	
		Base Pay - Increase in Pay	Use when it is not a promotion or demotion. Used for University Staff or Faculty when there is not a title change.	

ePAR Actions	Action	Action Reason	Reason Definition	Notes
		Percent of Time Change	Use when the percent of time worked is changing, but nothing else, that results in an increase to base pay.	
		Restore Pay	Use to restore pay following a temporary increase or decrease in pay.	
		Temp Pay - Increase in Pay	Use when a temporary increase in pay is needed.	
		Temp Pay - Decrease in Pay	Used when employee stays in current position/title and pay is reduced (e.g., loss of grant funding).	

Non-Pay Actions

Non-Pay Actions include the following:

- ePAR Job Change – Any changes to positions should be made directly from position by entering updates directly on a new position row.
- ePAR Group Change – Any changes to positions should be made directly from position by entering updates directly on a new position row.
- ePAR Separation
- ePAR Group Termination
- ePAR Leave

ePAR Actions	Action	Action Reason	Reason Definition	Notes
ePAR Job Change Note: If the position number is changing, use ePAR Pay Rate Change or TBT Transfer (both are Pay Actions) rather than Job Change.	Data Change	Change Appointment End Date	Change or correction to a job's appointment end date.	
		FLSA Change	To reflect a change in FLSA status.	Generally an HR function.
		Pay Group Change	Change or correction to an employee's pay group.	
		Service Date Change	Change or correction to an employee's service dates.	
		Other - Comment Required	Change or correction to a position or an employee's information that does not include a change in position code/title or pay.	
	Position Change	Change Appointing Authority	Change the appointing authority for a position.	Changes to positions should be made directly from Position and not through an ePAR.

ePAR Actions	Action	Action Reason	Reason Definition	Notes
		Change in Pos Title or Desc	Only to be used when changing the working title.	
		Faculty Promotion	To be used to promote a Faculty member to a new title without a pay rate change.	
		Job Re-Classification	Only to be used when it is not a promotion or demotion. Classified Staff only.	
		Location Change	To change department and location information.	
		New Supervisor/ Manager	To reflect a reporting structure change.	
		Other - Comment Required	Change or correction to a position or an employee's information that does not include a change in position code/title or pay.	
ePAR Group Change Use Position Management to update positions directly.	Position Change	Change Appointing Authority	Change the appointing authority for a position.	Changes to positions should be made directly from Position and not through an ePAR.
		Location Change	To change department and location information.	
		New Supervisor/ Manager	To reflect a reporting structure change.	
ePAR Separation	Termination	Cause	To terminate an employee for cause.	
		Death	To terminate an employee due to death of employee.	
		Disability Retirement	To terminate an employee due to a disability termination.	
		ES - Other	Used by Employee Services to move jobs around, as needed to ensure payroll is working as expected.	
		End of Appointment	To terminate an employee at the end of the appointment.	
		Exhaustion of Leave	To terminate an employee due to exhaustion of leave.	
		Job Abandonment	To terminate an employee due to job abandonment.	
		Layoff	To layoff an employee.	
		Not Eligible for Rehire	To terminate an employee and flag as not eligible to be rehired.	
		Other - Comment Required	To terminate an employee for other or multiple reasons. Please use the comment box to explain.	
		Probationary Rejection	To terminate a Classified Staff member while still in the probationary period.	
		Resignation	To terminate an employee when the employee resigns.	
Retirement	To terminate an employee at retirement.			
ePAR Group Termination	Termination	End of Appointment		

ePAR Actions	Action	Action Reason	Reason Definition	Notes
ePAR Leave	Leave of Absence	Administrative	To put an employee on an administrative leave for an extended time with pay.	
		Family and Medical Leave Act	Leave that meets the eligibility requirements of the Family Medical Leave Act.	
		Military Service	If military service continues beyond 15 calendar days, as described below, the employee will be placed on military leave without pay for any remaining period of required military service. While on military leave, the employee continues to accrue vacation and sick leave.	
		On the Job Injury	Workers' Compensation. Leave for employees injured during the course and scope of employment.	
		Other - Personal Reason	Other than those listed here.	
		Sabbatical	Leave granted to a faculty member to enhance their scholarly and/or teaching competence and potential for service to the university, and to advance departmental program goals. (See Regent Policy 5.)	
		Short Term Disability	Temporary absences due to inability to work due to illness or injury.	
	Paid Leave of Absence	Administrative	PAID-To put an employee on an administrative leave for an extended time with pay.	
		Family and Medical Leave Act	PAID-Leave that meets the eligibility requirements of the Family Medical Leave Act.	
		Military Service	PAID-Leave for military service of 15 calendar days. While on military leave, the employee will continue to accrue vacation and sick leave.	
		On the Job Injury	PAID-Workers' compensation. Leave for employees injured during the course and scope of employment.	
		Sabbatical	PAID-Leave granted to a faculty member to enhance their scholarly and/or teaching competence and potential for service to the university, and to advance departmental program goals. (See Regent Policy 5.)	
		Short Term Disability	PAID-Temporary absences due to inability to work due to illness or injury.	
	Return from Leave	Return from Leave		
	Return from Short Work Break	Return from Short Work Break		
	Short Work Break	Short Work Break		