

Human Capital Management (HCM): Step-by-Step Guide

Additional Pay: Entering and Reviewing Recurring Payments

This guide describes the process for entering a recurring payment using an ePAR Pay Action.

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Before You Begin

Before you begin, you should have the following information available:

- Empl ID
- Effective date of the additional pay request
- Funding information (Earnings, Department, Project, SpeedType)

Navigation tips:

HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

- 1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
- 2. Click Employee Self Service.
- 3. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.

The magnifying glass is called a look up and displays search results for you to select valid field values.

^{*} The book and checkmark lets you spell check text boxes.

The down arrow lets you hide, or collapse, sections you do not want to view.

Click the arrow to expand the section.

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Beginning the Transaction

To enter a recurring payment:

- 1. From the HCM Community Users dashboard, click the Pay Actions tile.
- 2. Under ePAR Additional Pay, click Add.

Smart ePAR Pay Actions	
ePAR Additional Pay	ePAR Non-Person Profile (NPP)
Add One Time Pay or Recurring pay to Employee	Add or Update
Add Modify	Add Modify
Inquiry	Inquiry

Step 1: Search for Employee

- 1. Select the Recurring Payment option.
- 2. Use the Search Criteria fields to find the correct employee, and click Search.

Step 1 of 3: ePAR Additional Pay	Search										
 Transaction Details 											
PAR Action: Additional Pay	Action:	Additional Pay		C	ocument ID:	ePAR Additional Pa	y				
Request ID: NEXT	Reason Code	e:			ocument Instance:	0					
ePAR Status: Initial	Effective Da	te: 01/12/2017			ocument Status:	Initial / Add Entry					
	Effective Se	q: 0									
Payment Type											
OneTime Payment	(i) Rec	curring Payment									
-	0.144	ournig r dyniciic									
Search Criteria	_										
Empl ID:											
First Name:											
Last Name:											
Department:											
Position Number:				-							
Search Clear											
										1	
Search Results										12	First 🕚 1-2 of 2 🕑 Last
Empl ID First Name Last Name	Empl Record	Effective Date 8	Eff Seq	Position Number	Description	Department	Descriptio	n	Job Code	Description	Empl Status
8	0	12/01/2015	c	00603980	Faculty Retiree (ORP)) 10623	HR-Univ	ersity Retirees,GC	5101	Faculty Retiree (ORP) Active
	3	12/01/2015	c	00687320	Emeritus - Professor	10161	Biology-	MCD Instruction	1452	Emeritus - Professor	N.
Search for Recurring Payments											3

- 3. If not already selected, select the checkbox that appears next to the correct employee's record, and click **Search for Recurring Payments**.
- If the search returns Recurring Payments, select the checkbox that appears next to the correct Recurring Payment and click Change/End Recurring Payment, or click Create Recurring Payment.

Se	earch Res	ults													
	Empl ID	First Name	Last Name	Empl Record	Earnings Code	Effective Date	Addl Seq#	Position Number	Description	Department	Description	Job Code	Description	Speed Type	Earnings End Date
				0	AMP	12/01/2015	1	00612799	Retiree - Emeritus	10623	HR-University Retirees,GC	5102	Faculty Retiree-Emeritus (ORF	")	01/14/2017
				0	AMP	01/15/2017	1	00612799	Retiree - Emeritus	10623	HR-University Retirees,GC	5102	Faculty Retiree-Emeritus (ORF	9	
C	hange/End	d Recurring Pay	ment		Create Recurrin	g Payment									

Step 2: Enter Initial Details

1. Complete the necessary fields (highlighted fields are required, except End Date):

ePAR Status: Initial Effective Date: 11/23/2015 Docum Effective Seq: 0	eent Instance: 0 eent Status: Initial / Add Entry
Effective Seq: 0 Employee Details Empl ID: Empl ID: Name: Empl ID: Empl ID: Last P Profile Type: Profile ID: Last P	initiati rinda Eno j
Employee Details Name: Empl ID: Empl I Profile Type: Profile ID: Last P	
Name: Empl ID: Empl I Profile Type: Profile ID: Last P	
Profile Type: Profile ID: Last P	
Prome Type.	tcd: 0
l act T	ersonnel Action:
Historical ePARs Pending ePARs East	ansaction Date:
Action/Reason Selection	
Action: Additional Pay Teaso	n: Recurring Payment 🔹
ffective Date: 11/23/2015 D End Da	02/29/2016
Additional Pay Info	
arnings Code: Bonus 🔻	
arnings: 2,500.00	
Goal Amount: 7,500.00	
Comments:	

2. Click Next.

Step 3: Additional Pay - Job Detail and Funding

- 1. Update the necessary information in the New Value fields under Default Job Info, if applicable.
- 2. Complete the New Funding section.

Step 3 of 3: 6	ePAR Additional P	Pay							
Transaction I	Details								
PAR Action: A	Additional Pay	Action:	Additional Pay	D	ocument ID:	ePAR A	dditional Pay		
Request ID: N	IEXT	Reason Code:	Recurring Payment	D	ocument Instance:	0			
ePAR Status: Ir	nitial	Effective Date	: 11/23/2015	D	ocument Status:	Initial / A	Add Entry		
		Effective Seq:	0						
Employee De	etails								
Name:		Empl ID:		E	mpl Rcd:	0			
Profile Type:		Profile ID:		L	ast Personnel Actio	on:			
	listorical ePARs		Pending ePARs	L	ast Transaction Da	te:			
Default Job Info	Current Value				New Value				
				-					
Position Number:					Q				
Position Number: Business Unit:					Q				
				5					
Business Unit:				5	Q				
Business Unit: Department:				(E	51000 Q				
Business Unit: Department:				E	51000 Q				
Business Unit: Department:				Ę	51000 Q				
Business Unit: Department: Job Code:				E	51000 Q				
Business Unit: Department: Job Code: <u>New Funding</u>		rd: 0 Total Sala	ry: 7,500,00		51000 Q				
Business Unit: Department: Job Code:	Empl Record	rd: 0 Total Sala	ry: 7,500.00	Amt Pct	م 1000 ع م		First	④ 1 of 1	La
Business Unit: Department: Job Code: <u>New Funding</u>	Empl Recor	-	ry: 7,500.00 roject/Grant		م 1000 ع م	ze Find [카]	First Distribution %	 ④ 1 of 1 	La

3. If needed, click the Attach icon to attach additional documentation.



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Step 4: Saving and Submitting the Transaction

1. Click Save.



2. When you receive this message with your ePAR additional pay number, click OK.





- 3. Click Submit.
- 4. Click OK.

 \checkmark

Message]
System Updated Successfully (0,0)	

5. Click **OK** again to return to your transaction page. It will be in Display Only view mode.

The Approval Map
ePARApproval
Request ID=POI0000107:Approved
Path 1

Reviewing Existing Recurring Payments

This section shows how to review existing recurring payments for individual employees.

- Navigate to Create Additional Pay. (NavBar> Menu> Payroll for North America> Employee Pay Data USA> Create Additional Pay.
- 2. Type search criteria in the appropriate fields.

Create Additional Pay	
Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.	
Precent Searches Choose from recent searches	P
Empl ID begins with v Empl Record = v Name begins with v Last Name begins with v Second Last Name begins with v Alternate Character Name begins with v Middle Name begins with v Alternate Character Name begins with v Clear Case Sensitive Include History Search Clear	

- 3. Press Enter, or click Search.
- 4. View existing recurring payments.

rynn Shader	Em	iployee		Empl ID 268621	En	npl Record	0
dditional Pay					Find View All	First 🕚	1 of 1 🕑 Las
E	Earnings Code 🖟	\PF	Additional I	Pay Flat			
Effective Date					Find View All	First 🕚	1 of 1 🕑 Last
	Effective Date	12/01/2015					
Payment Details	5			F	ind View All	First 🕙 🕯	l of 1 🕑 Last
	Addl Seq Nbr		1	End Date	02/29/2016		
	Rate Code			Reason	Not Specified		
	Earnings						
	Hours			Hourly Rate			
	Goal Amount			Goal Balance			
	Sep Check Nbr				Disable Direct	t Deposit	
		OK to Pay			Prorate Addit	ional Pay	
Applies To Pa	ay Periods						
First	Sec.	ond	Third	Fourth	🗌 Fif	th	
Job Inform	nation						
Tax Inform	ation						

Search