Human Capital Management: Step-by-Step Guide

Entering Job Changes

HCM lets you make changes to an employee’s job and position including: Appointment, Campus Box, Supervisor, Appointing Authority, Location, FLSA, Pay Group, Working Title, and Faculty Promotion.

Caution: Any updates that affect position must be made through the position page, not through an ePAR transaction. Position changes include job code, business unit, title, standard hours/FTE, full/part-time indicator, classified indicator, location, department and reports to. If you want to update a position, refer to Updating a Position Step-by-Step Guide, which describes the process through Non-Pay Actions> Position Management.

Contents

Entering Job Changes ................................................................................................................................. 1
Before You Begin ........................................................................................................................................ 2
Beginning the Transaction .......................................................................................................................... 2
Step 1: Employee Selection .......................................................................................................................... 3
Step 2: Action/Reason ................................................................................................................................. 4
Step 3: Job Information .............................................................................................................................. 5
Step 4: Saving and Submitting ..................................................................................................................... 5
Data Change: Change Appointment End Date ............................................................................................. 6
Data Change: FLSA Change ........................................................................................................................ 6
Data Change: Other - Comment Required .................................................................................................. 7
Data Change: Pay Group Change ................................................................................................................. 8
Data Change: Service Date Change ............................................................................................................. 9
Position Change: Change Appointing Authority ......................................................................................... 9
Position Change: Change in Pos Title or Desc .......................................................................................... 10
Position Change: Faculty Promotion .......................................................................................................... 11
Position Change: Job Re-Classification ..................................................................................................... 12
Position Change: Location Change ............................................................................................................. 13
Position Change: New Supervisor/Manager ............................................................................................... 14
Position Change: Other - Comment Required ............................................................................................ 15
Before You Begin

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.

Beginning the Transaction

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

<table>
<thead>
<tr>
<th>Smart ePAR Non-Pay Actions</th>
</tr>
</thead>
</table>
| **ePAR Job Change**  
Make changes to non-pay related fields  
**Add** Modify  
Inquiry |
| **ePAR Group Termination**  
ePAR Employee Group Termination  
**Add** Modify  
Inquiry |
| **ePAR Separation**  
Retire or Terminate an Employee  
**Add** Modify  
Inquiry |
| **ePAR Group Change**  
ePAR Employee Group Change  
**Add** Modify  
Inquiry |
| **ePAR Leave**  
Leave of Absence, Paid Leave or Return from Leave  
**Add** Modify  
Inquiry |
Step 1: Employee Selection

1. Type the Empl ID, or other search criteria, and click Search.

![Image of Employee Selection screen](image_url)

2. Select the checkbox ☑️ for the correct employee's record number.

![Image of Employee Selection results](image_url)

3. Click Next.
Step 2: Action/Reason

1. From the **Action** listbox, select an action code.
   Depending on the action code you choose, the reason code choices change, as shown below:

   ![Action/Reason Selection](image)

2. From the **Reason** listbox, select a reason for the action you are taking.
   Depending on which reason code you choose, HCM opens different fields for data entry. For information about what fields are opened, click the links from the table below. For information about which transactions use which action reasons, refer to the *Transaction Pages and Action Reasons* job aid, available from the HCM Community website.

   **Data Change**
   - Change Appointment End Date
   - FLSA Change
   - Other - Comment Required
   - Pay Group Change
   - Service Date Change

   **Position Change**
   - Change Appointing Authority
   - Change in Pos Title or Desc
   - Faculty Promotion
   - Job Re-Classification
   - Location Change
   - New Supervisor/Manager
   - Other - Comment Required

3. Type or select an **Effective Date**. The Effective Date should **not** be the same as the old effective date.
   **Note:** All fields with an asterisk (*) are required.

4. Click **Next**.
Step 3: Job Information

1. Under the New Value column, type, or select from lookups, the new values for information being changed.

Step 4: Saving and Submitting

1. Click **Save** from the top left corner.

2. After you receive your ePAR Job Change number, click **OK**.

3. Click **Submit**.

4. Click **OK**.

**Note:** The remaining pages of this guide describe which fields open for update depending on what action reason you selected in Step 2: Action/Reason. Each of the following sections provides a link back to Step 3: Job Information, reminding you to enter an Effective Date and complete Step 4: Saving and Submitting.
Data Change: Change Appointment End Date

Using the Change Appointment Date reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

- Work Information:
  - Position Title
  - Location Code
  - Reports To
  - Appointing Authority

- Job Information:
  - FLSA Status

- Employment Data:
  - Company Seniority Date
  - Probation Date
  - Appointment End Date

Click to return to transaction steps.

Data Change: FLSA Change

Using the FLSA Change reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information of the transaction:

- Work Information:
  - Position Title
  - Location Code
  - Reports To
  - Appointing Authority

- Job Information:
  - Officer Code
  - FLSA Status
  - Pay Group
Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

Note: Changing the Pay Group will likely have an effect on the employee’s benefits. Before proceeding with making this change, be certain that you know the impact.

Click to return to transaction steps.

Data Change: Other - Comment Required

![Image of Data Change: Other - Comment Required]

Using the Other – Comment Required reason code, you will see that the Profile Type is displayed in Step 2 of the transaction, and the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:
- FLSA Status

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

In Step 5 of the Other – Comment Required transaction, you will be prompted to update the Non-Person Profile/Position. Depending on how many aspects of the position you choose to update, the number of steps in the
transaction may increase. Most importantly, you must remember to leave the Feed to CU Careers? checkbox unchecked, as shown below:

Click to return to transaction steps.

Data Change: Pay Group Change

Using the Pay Group Change reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:
- Officer Code
- FLSA Status
- Pay Group

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

Note: Changing the Pay Group will likely have an effect on the employee's benefits. Before proceeding with making this change, be certain that you know the impact.

Click to return to transaction steps.
Data Change: Service Date Change

Using the Service Date Change reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:
- FLSA Status

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

Click to return to transaction steps.

Position Change: Change Appointing Authority

Using the Change Appointing Authority reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title
- Location Code
- Reports To
- Appointing Authority
Job Information:
- Officer Code
- FLSA Status
- Pay Group

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

Note: Changing the Pay Group will likely have an effect on the employee's benefits. Before proceeding with making this change, be certain that you know the impact.

Click to return to transaction steps.

Position Change: Change in Pos Title or Desc

Using the Change in Pos Title or Desc reason code, you will see the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:
- Officer Code
- FLSA Status
- Pay Group

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

Note: Changing the Pay Group will likely have an effect on the employee's benefits. Before proceeding with making this change, be certain that you know the impact.

Click to return to transaction steps.
Position Change: Faculty Promotion

Using the Faculty Promotion reason code, you will see that the Profile Type is displayed in Step 2 of the transaction, and the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

Work Information:
- Position Title

Job Information:
- Job Code
- FLSA Status

Employment Data:
- Company Seniority Date
- Probation Date
- Appointment End Date

In Step 5 of the Faculty Promotion transaction, you will be prompted to update the Non-Person Profile/Position. Depending on how many aspects of the position you choose to update, the number of steps in the transaction may increase. Most importantly, you must remember to leave the Feed to CU Careers? checkbox unchecked, as shown below:

Click to return to transaction steps.
Position Change: Job Re-Classification

Using the Job Re-Classification reason code, you will see that the Profile Type is displayed in Step 2 of the transaction, and the following Work Information, Job Information, and Employment Data fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

- **Work Information:**
  - Position Title

- **Job Information:**
  - Job Code
  - FLSA Status

- **Employment Data:**
  - Company Seniority Date
  - Probation Date
  - Appointment End Date

In Step 5 of the Job Re-Classification transaction, you will be prompted to update the Non-Person Profile/Position. Depending on how many aspects of the position you choose to update, the number of steps in the transaction may increase. Most importantly, you must remember to leave the Feed to CU Careers? checkbox unchecked, as shown below:

Click to return to transaction steps.
Using the **Location Change** reason code, you will see the following **Work Information**, **Job Information**, **Campus Box** and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

**Work Information:**
- Position Title
- Location Code
- Reports To
- Appointing Authority

**Job Information:**
- Officer Code
- FLSA Status
- Pay Group

**Employment Data:**
- Company Seniority Date
- Probation Date
- Appointment End Date

**CU Position Info:**
- Campus Box

**Note:** Changing the Pay Group will likely have an effect on the employee’s benefits. Before proceeding with making this change, be certain that you know the impact.

[Click to return to transaction steps.]
Position Change: New Supervisor/Manager

Using the **New Supervisor/Manager** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

**Work Information:**
- Position Title
- Location Code
- Reports To (If recruiting in the near future, make sure there is an incumbent in the Reports To position.)
- Appointing Authority

**Job Information:**
- Officer Code
- FLSA Status
- Pay Group

**Employment Data:**
- Company Seniority Date
- Probation Date
- Appointment End Date

**Note:** Changing the Pay Group will likely have an effect on the employee’s benefits. Before proceeding with making this change, be certain that you know the impact.

[Click to return to transaction steps.](#)
Using the **Other - Comment Required** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 5) of the transaction:

**Work Information:**
- Position Title
- Location Code
- Reports To
- Appointing Authority

**Job Information:**
- Officer Code
- FLSA Status
- Pay Group

**Employment Data:**
- Company Seniority Date
- Probation Date
- Appointment End Date

**Note:** Changing the Pay Group will likely have an effect on the employee’s benefits. Before proceeding with making this change, be certain that you know the impact.

[Click to return to transaction steps.](#)