

Human Capital Management: 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 row to expand the section.

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.



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.

 Transaction Details 	y search									
PAR Action: Additional Pay	Action:	Additional Pay		D	locument ID:	ePAR Additional Pay				
Request ID: NEXT	Reason Code	e:		D	ocument Instance:	0				
ePAR Status: Initial	Effective Da	te: 01/12/2017		D	ocument Status:	Initial / Add Entry				
	Effective Se	:q: 0								
Payment Type										
OneTime Payment	• Red	curring Payment								
Search Criteria	-									
mpl ID:										
irst Name:										
.ast Name:										
Department:										
Position Number:				_						
Search Clear										
Search Results									1	First 🕚 1-2 of 2 🕑 La
	Empl Record	Effective Date	Eff Seq	Position Number	Description	Department	Description	Job Code	Description	Empl Status
Empl ID First Name Last Name	_			00802080	Faculty Ratires (ORP)	10623	HR-University Retire	es,GC 5101	Faculty Ratirea (ORP	
Empl ID First Name Last Name	0	12/01/2015		00003800	radialy recirce (ora)		-		raddig ricaree (ora) Active

- 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.

5	earch De	oulto													
-	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
6				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 (ORP	")	
0	hange/En	d Recurring Pay	ment		Create Recurrin	g Payment			1						

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Step 2: Enter Initial Details

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

Request ID:			Additional Pay	Document	ID:	ePAR Additional Pay
	NEXT	Reason Code:	Recurring Payment	Document	Instance:	0
ePAR Status:	Initial	Effective Date:	11/23/2015	Document	Status:	Initial / Add Entry
		Effective Seq:	0			
Employee	Details					
Name:		Empl ID:		Empl Rcd:		0
Profile Type:		Profile ID:		Last Perso	nnel Action:	
	Historical ePARs		Pending ePARs	Last Trans	action Date:	
Action/Rea	son Selection					
Action:	Additional Pay	•		*Reason:	Recurring Pay	ment 🔻
ffective Date:	11/23/2015			End Date:	02/29/2016)
Additional	Pay Info					
arnings Code:	Bonus	•				
arnings:	2,500.00					
Soal Amount:	7,500.00					
Comments:						
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.

	PAR Additional	l Pay								
Transaction D)etails									
PAR Action: A	dditional Pay	Action:	Additional Pay	Do	cument ID:	ePAR A	Additional Pay			
Request ID: N	EXT	Reason Code	: Recurring Payment	Do	cument Instance:	0				
ePAR Status: In	itial	Effective Date	: 11/23/2015	Do	cument Status:	Initial / A	Add Entry			
		Effective Seq	: 0							
Employee De	tails									
Name:		Empl ID:		Em	pl Rcd:	0				
Profile Type:		Profile ID:		Las	st Personnel Action					
Hi	istorical ePARs		Pending ePARs	La	st Transaction Date					
Default Job Info	Current Value				NewValue					
	ourrone value									
Position Number:										
Position Number: Business Unit:					Q					
Position Number: Business Unit: Department:				51	۵ ۵ ۵۰۰ ۵					
Position Number: Business Unit: Department: Job Code:				51						
Position Number: Business Unit: Department: Job Code:				51						
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Position Number: Business Unit: Department: Job Code:				51						
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Position Number: Business Unit: Department: Job Code: Dob Code: New Funding Empl ID:	Empl Rec	cord: 0 Total Sala	ry: 7,500.00	● Amt ◎ Pct						
Position Number: Business Unit: Department: Job Code: New Funding Empl ID:	Empl Rec	cord: 0 Total Sala	ry: 7,500.00	● Amt ◎ Pct	Personalize	Find 🔊	First	(4) 1 0	f1 🕑	La
Position Number: Business Unit: Department: Iob Code: New Funding Empl ID: Budget Amount	Empl Rec	cord: 0 Total Sala Department F	ry: 7,500.00 Project/Grant	Amt © Pct	Personalize Product F	Find 🖅 und Code	First Distribution %	④ 10	f1 🕑	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.





Click Submit.
 Click OK.

2	
ſ	Message
	System Updated Successfully (0,0)

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

ок	_
	Approval Map
eΡ	
01	Request ID=POI0000107: Approved
	Path 1
	Path 1

Reviewing Existing Recurring Payments

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

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

Create Additional Pay	Favorites 👻 Main Me	enu v 🚽 > P	ayroll for North America 🔫 🗲	Employee Pay Data USA 🔻 >	Create Additional Pay
Create Additional Pay Search Create Additional Pay Create Additio			la va da		
Bodde Colorado Serringa Derver Antabulz Medical Campus Create Additional Pay Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Keyword Search Search Criteria Empl ID begins with • Last Name begins with • Second Last Name begins with • Alternate Character Name begins with • Middle Name begins with • Include History Case Sensitive	L J Chivers	ity of Co	lorado	Create Additional Pay 👻	Search
Create Additional Pay Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Keyword Search Search Criteria Empl ID begins with 268621 Empl Record = Name begins with Last Name begins with Last Name begins with Alternate Character Name begins with Alternate Character Name begins with Clear Basic Search Save Search Criteria	Boulder Colorado Sp	rings Denver Anschutz	r Medical Gampus		
Create Additional Pay Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Keyword Search Search Criteria Empl ID begins with 268621 Empl Record = Name begins with Last Name begins with Last Name begins with Alternate Character Name begins with Alternate Character Name begins with Clear Basic Search Search Search Criteria					
Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Keyword Search Search Criteria Empl ID begins with 268621 Empl Record = Image: Search Criteria Empl ID begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with Middle Name Descond Last Name Begins with Middle Name Search Clear Basic Search	Create Additional Pay	/			
Find an Existing Value Keyword Search Search Criteria Empl ID begins with • 268621 Empl Record = • • Name begins with • Last Name begins with • Second Last Name begins with • Alternate Character Name begins with • Middle Name begins with • Include History Case Sensitive	Enter any information you h	ave and click Se	earch. Leave fields blank for a	list of all values.	
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Empl ID begins with ▼ 268621 Empl Record = ▼ Name begins with ▼ ■ Last Name begins with ▼ ■ Second Last Name begins with ▼ ■ Alternate Character Name begins with ▼ ■ Middle Name begins with ▼ ■ Include History ■ Case Sensitive ■					
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Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with Middle Name begins with Middle Name begins with Include History Case Sensitive Search Clear Basic Search	Empl Record	= •			
Last Name begins with Second Last Name begins with Alternate Character Name begins with Middle Name begins with Include History Case Sensitive	Name	begins with $~$			
Second Last Name begins with Alternate Character Name begins with Middle Name begins with Ctear Basic Search Save Search Criteria	Last Name	begins with 🔻			
Alternate Character Name begins with Middle Name begins with Ctear Basic Search Save Search Criteria	Second Last Name	begins with 🔻			
Middle Name begins with Include History Case Sensitive Search Clear Basic Search	Alternate Character Name	begins with 🔻			
Clear Basic Search Save Search Criteria	Middle Name	begins with 🔻			
Search Clear Basic Search 🖾 Save Search Criteria	Include History Ca	ise Sensitive			
Search Clear Basic Search 🖾 Save Search Criteria					
Search Citear Basic Search 🖾 Save Search Chiefla	Quarte Olana	Dania Onarah 🖉			
	Search	Basic Search	 Save Search Criteria 		

3. Press Enter, or click Search.



4. View existing recurring payments.

Additional Pay Earnings Code APF Additional Pay Flat Effective Date F Effective Date 12/01/2015 Payment Details FI Addl Seq Nbr 1 Earnings Hours Hours Hourly Rate Goal Amount Goal Balance Sep Check Nbr Image: Comparison of the pay Periods	Find View All First (1 of 1) Las ind View All First (1 of 1) Last nd View All First (1 of 1) Last 02/29/2016 Not Specified
Earnings Code APF Additional Pay Flat Effective Date 12/01/2015 Payment Details Flit Addl Seq Nbr 1 End Date Reason Earnings Hours Hours Hourly Rate Goal Amount Goal Balance Sep Check Nbr Implies To Pay Periods	ind View All First ④ 1 of 1 ④ Last nd View All First ④ 1 of 1 ④ Last 02/29/2016 Not Specified
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Effective Date 12/01/2015 Payment Details Fil Addl Seq Nbr 1 Addl Seq Nbr 1 Rate Code Reason Earnings Image: Code Hours Hourly Rate Goal Amount Goal Balance Sep Check Nbr Image: Code Image: Code Code Applies To Pay Periods Image: Code	nd View All First ④ 1 of 1 ④ Last 02/29/2016 Not Specified
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Goal Amount Goal Balance Sep Check Nbr Ø OK to Pay Applies To Pay Periods	
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OK to Pay Applies To Pay Periods	Disable Direct Deposit
Applies To Pay Periods	Prorate Additional Pay
First Second Third Fourth	Fifth
Job Information	
▶ Tax Information	