

# 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.



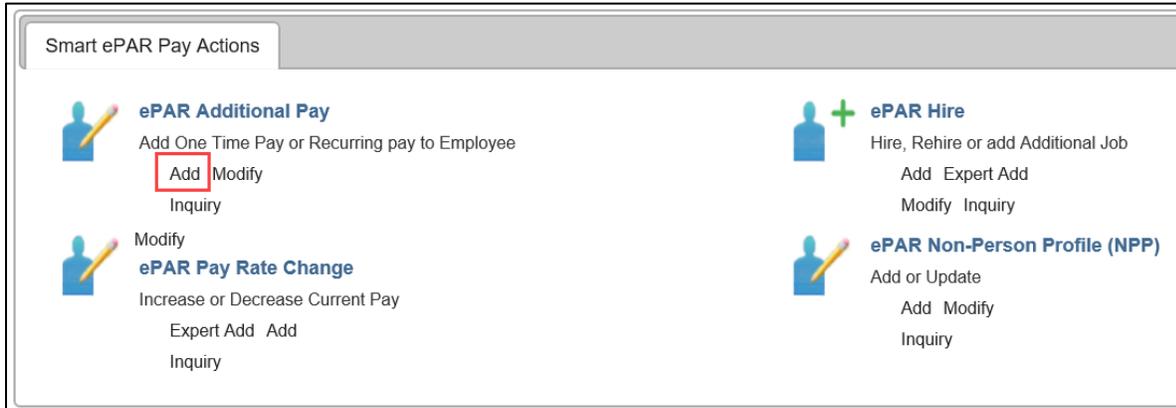
The down arrow lets you hide, or collapse, sections you do not want to view.

Click the  arrow to expand the section.

## Beginning the Transaction

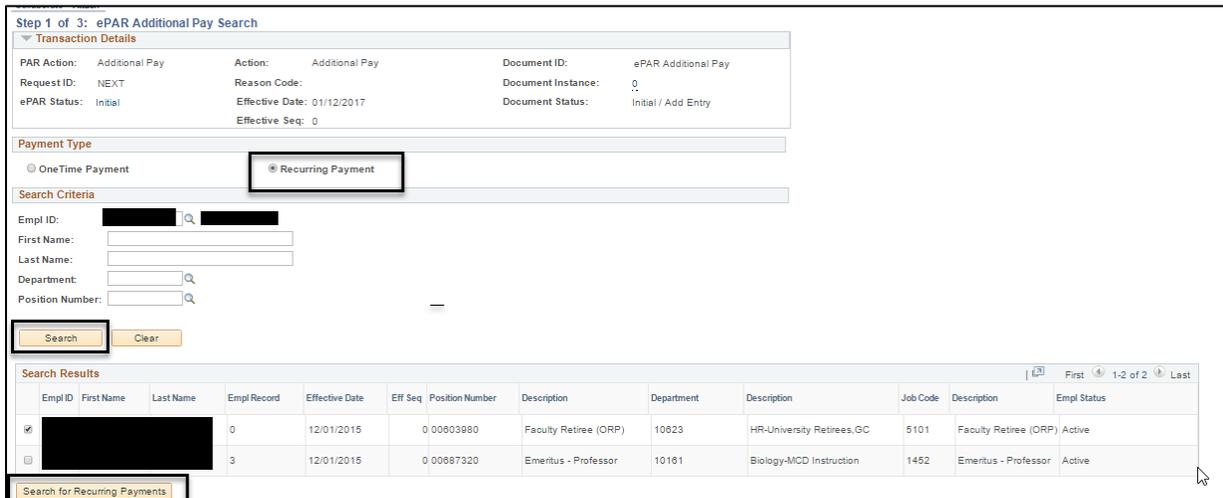
To enter a recurring payment:

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**.



3. If not already selected, select the checkbox that appears next to the correct employee's record, and click **Search for Recurring Payments**.
4. 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**.



## Step 2: Enter Initial Details

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

Create ePAR Additional Pay Request  
 Step 2 of 3: ePAR Additional Pay Action Reason Selection

**Transaction Details**

PAR Action: Additional Pay    Action: Additional Pay    Document ID: ePAR Additional Pay  
 Request ID: 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: [Redacted]    Empl ID: [Redacted]    Empl Rcd: 0  
 Profile Type: [Redacted]    Profile ID: [Redacted]    Last Personnel Action:  
 Historical ePARs    Pending ePARs    Last Transaction Date:

**Action/Reason Selection**

Action: Additional Pay    Reason: Recurring Payment  
 Effective Date: 11/23/2015    End Date: 02/29/2016

**Additional Pay Info**

Earnings Code: Bonus  
 Earnings: 2,500.00  
 Goal Amount: 7,500.00

Comments: [Text Area]

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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: ePAR Additional Pay

**Transaction Details**

PAR Action: Additional Pay    Action: Additional Pay    Document ID: ePAR Additional Pay  
 Request ID: 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: [Redacted]    Empl ID: [Redacted]    Empl Rcd: 0  
 Profile Type: [Redacted]    Profile ID: [Redacted]    Last Personnel Action:  
 Historical ePARs    Pending ePARs    Last Transaction Date:

**Default Job Info**

Current Value    New Value

Position Number: [Redacted]    [Redacted]  
 Business Unit: [Redacted]    [Redacted]  
 Department: [Redacted]    51000  
 Job Code: [Redacted]    [Redacted]

**New Funding**

Empl ID: [Redacted]    Empl Record: 0    Total Salary: 7,500.00    Amt    Pct

Personalize | Find | First 1 of 1 | Last

Budget Amount	Earnings	Department	Project/Grant	Speedtype	Product	Fund Code	Distribution %
1	7500.00	[Redacted]	[Redacted]	[Redacted]			

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

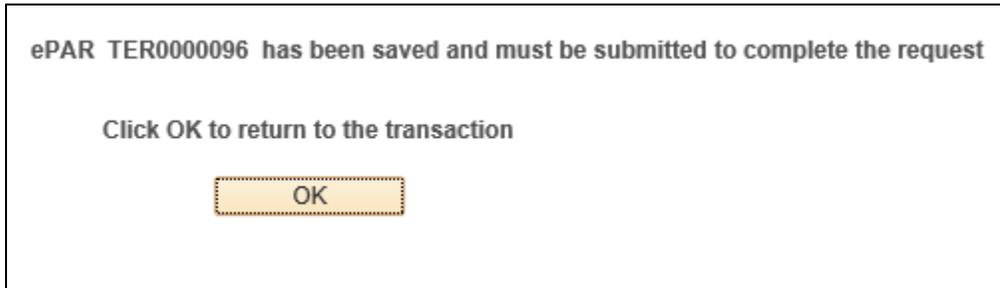


## Step 4: Saving and Submitting the Transaction

1. Click **Save**.



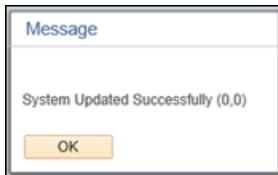
2. When you receive this message with your ePAR additional pay number, click **OK**.



3. Click **Submit**.



4. Click **OK**.



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

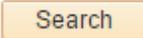


## Reviewing Existing Recurring Payments

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.

The screenshot shows the 'Create Additional Pay' search criteria form. At the top, there are navigation tabs: 'Favorites', 'Main Menu', 'Payroll for North America', 'Employee Pay Data USA', and 'Create Additional Pay'. The University of Colorado logo and name are displayed, along with a search bar containing 'Create Additional Pay' and a 'Search' button. Below the header, the page title is 'Create Additional Pay' with a sub-instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Keyword Search'. A 'Search Criteria' section is expanded, showing several dropdown menus for 'Empl ID' (set to 'begins with' and '268621'), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', all set to 'begins with'. There are also checkboxes for 'Include History' and 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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

The screenshot shows the 'Create Additional Pay' details page for employee Brynn Shader. The page title is 'Create Additional Pay'. At the top, it displays the employee's name 'Brynn Shader', 'Employee', 'Empl ID 268621', and 'Empl Record 0'. Below this is a table for 'Additional Pay' with columns for 'Earnings Code' (APF) and 'Additional Pay Flat'. The table has a search bar and navigation controls. Below the table, there is a section for 'Effective Date' (12/01/2015) and 'Payment Details'. The 'Payment Details' section includes fields for 'Addl Seq Nbr' (1), 'End Date' (02/29/2016), 'Rate Code', 'Reason' (Not Specified), 'Earnings', 'Hours', 'Hourly Rate', 'Goal Amount' (redacted), and 'Goal Balance'. There are also checkboxes for 'OK to Pay', 'Disable Direct Deposit', and 'Prorate Additional Pay'. Below the payment details is a section for 'Applies To Pay Periods' with checkboxes for 'First', 'Second', 'Third', 'Fourth', and 'Fifth'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.