

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

Entering Job Changes: Data Changes and Pay Rate Changes

This guide describes entering job changes in HCM using a template-based transaction (TBT). A TBT is a streamlined method of entering data into HCM for a variety of employee changes and updates. A job change transaction can be either a data change or a pay rate change to an active employee job record.

Note: This guide includes job changes made to contract employees.

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What Are Job Changes?

A job change transaction can be either a data change or a pay rate change. These changes can be made to active employees, who may or may not be paid on contract.

Data Changes

Data changes can be made to the following items:

- Appointment End Date. Used for reporting purposes and to calculate encumbrances, as well as for other campus-specific reasons.
- Expected End Date. Used for Auto Term purposes. Refer to *Auto Term Step-by-Step Guide* for more information.
- Contract and Non-Contract Reappointments.
- Other job information related to employee classification, such as Officer Code, FLSA Status, Employee Type, Pay Group, and more. See [Entering Transaction Details](#) later in this guide for more information.

Pay Rate Changes

Pay rate changes can be made when increasing or decreasing base or temporary pay, promoting or demoting an employee, or for other reasons.

Note: Faculty at the university are paid primarily using contract pay. Graduate students associated with teaching may also be paid on a contract. At the CU Boulder campus, all graduate students are paid on a contract. Contract pay is a calculation of pay that defines a contract pay type and its payment periods. Before the start of the academic year, faculty members elect the contract type indicating they are to be paid salary over 9 months or 12 months.

For contracts, the following pay rate changes can be made:

- Making a pay rate change on an existing contract
- Setting up a new contract on an active job record (Reappointment)

Boulder Campus: If you are entering a reappointment with a funding change, or if you are making a pay rate change for a graduate student, contact the HR Service Center at hrsc@colorado.edu.

Other guides with contract-related information:

- If you are hiring a new employee on a contract, or rehiring a contract employee on a terminated record, refer to [Hiring an Employee Step-by-Step Guide](#).
- If you are transferring an employee to a position while maintaining current contract parameters or with a new contract, refer to [Transferring an Employee Step-by-Step Guide](#).

Before You Begin

Before entering a job change (data change or pay rate change), you should have the following information:

- Employee ID.
- If the employee has multiple jobs, you should know the job record, or records, that you are updating.
- Know whether your Action is a data change, a pay rate change, or both. If you need to enter both a data change and a pay rate change, enter the Data Change transaction first and then the Pay Rate Change transaction. The effective dates can be the same because Job Data allows effective date sequencing.
- Know whether the employee is on, or going on, a contract.
- Effective date.
- **For pay rate changes:**
 - Position changes must be made and approved before making a pay rate change. If you need to update a position, refer to *Updating a Position Step-by-Step Guide*, which describes the process through Non-Pay Actions> Position Management.
 - SpeedTypes associated with funding.
- **For job changes involving contract pay:**
 - In addition to Effective Date, you should know the Contract Begin Date, Contract End Date, Payment Begin Date, and Payment End Date.
To find dates that are correct for your campus, run the Contract Crosswalk/Setup query:
 1. From the HCM Community Users dashboard, click the **HCM WorkCenter** tile.
 2. Click the **Resources** tab.
 3. Scroll down and select **Click here for ALL**.
 4. Select **Contract Crosswalk/Setup** (CUES_HCM_CONTRACT_CRWLK).
 5. From the **Business Unit** look up, select your campus.
 6. From the **Employee Group** dropdown, select either **Faculty** or **Student**.
 7. Click **View Results**.
 - Contract Pay Type: What is the academic selection of the employee? Is the contract to be paid over the academic year, or over 12 months (AY 9 pay 12). For lecturers, is it Fall/Spring or Other Pd Contract (used for non-semester time frames). If a graduate student, will it be fall, spring, or Other Pd Contract to pay over 9 months (students should never be set up on the AY 9 pay 9 contract).
 - Pay Group: All professional employees paid on a contract must be in the MON paygroup. All students paid on a contract must be in the STM paygroup.
 - If you are making a reappointment with a funding change, you will need to know the SpeedType (Combination Code) of the fund supporting this position.

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 job change:

1. From the HCM Community Users dashboard, click the **Transaction Launch Page** tile. The Transaction Launch Page appears. This page provides a single location for template based transactions.

The screenshot shows the Transaction Launch Page interface. At the top right, there are links for 'Related Content', 'New Window', 'Help', and 'Personalize Page'. The main content area is titled 'Transaction Launch Page' and contains a 'Search Criteria' section with input fields for Empl ID, First Name, Last Name, Date of Birth (with a 'By' dropdown), National ID, National ID Last 4, Department, and a '*Search Option' dropdown. Below the search fields are 'Search' and 'Clear All' buttons. Underneath is a table for 'ATS Applicants' with columns: Select, Source System, Applicant ID, Name, Date of Birth, National ID Last 4, Dept ID, Department Name, and Position Number. Below this table is a 'Clear ATS Selection' button. The next section is 'HCM Data' with columns: Select, Template Action, Empl ID, Empl Record, Name, Status, National ID Last 4, Effective Date, Unit, Dept ID, Department Name, Job Code, Job Title, Std Hrs, Date of Birth, and Termination Date. Below this table is a 'Clear HCM Selection' button. At the bottom left, there is an 'Add a Person' checkbox and a 'Submit' button.

2. In the Search Criteria section, type the **Empl ID**, or other personal identifying information you have.
3. From the **Search Option** list, select **Job Change**. This is required. The search option helps determine which template pages to display that are correct for your transaction. A Job Change presents templates for the following transactions:
 - Data or pay rate change to a non-contract employee
 - Data or pay rate change to an employee’s existing contract.
 - Data change to create a new contract, or reappointment.
4. Click **Search**. The system searches HCM to find existing records of employees in the database that you have permission to update. Existing records include those that are active or on a short work break, as well as any future-dated transaction records that have been approved. HCM displays the results in the HCM Data table. If no results are returned, you may not have access to the record you are searching for.
5. From the HCM Data listing, select the checkbox of the employee (and job record, if applicable) that you are updating.

Caution: Because employees may have more than one job, it’s important to ensure you have the correct employee and job record, before continuing. As only a few records are displayed at a time, you may need to page through the results to find the correct record, or search again using additional criteria.

HCM Data							Personalize Find View All [Print] [Grid] First 1 of 1 Last					
Select	Template Action	Empl ID	Empl Record	Name	Status	National ID Last 4	En. Date	Code	Job Title	Std Hrs	Date of Birth	Termination Date
<input checked="" type="checkbox"/>	Job Request		0		Active		06/1		Business Services Professional	40.00		

Clear HCM Selection

6. Click **Submit**. A message appears, asking if this is a contract employee.
 7. Indicate whether this employee is paid on a contract:
 - If this employee is not being paid on a contract, click **No**.
 - If the employee is being paid on a contract, click **Yes**. The system displays another message asking if this is a new contract.
 - If this is not a new contract, click **No**.
 - If this is a new contract, click **Yes**. You’re entering a reappointment. The system prompts you to enter an effective date of the contract. Select or enter the effective date and click **OK**. The system checks whether there is an overlapping contract; if there is an overlap, an error message appears and you are returned to the Transaction Launch Page.
- Note:** HCM populates other related contract dates based on the effective date of the contract. To view contract dates for your campus, run the Contract Crosswalk Query from Related Content.

After responding to the contract prompts, the Enter Transaction Details page appears, displaying the name of the template you are using and required fields, which appear with an asterisk.

Template Based Transactions

Enter Transaction Details

The following transaction details are required.

Template	Direct Non-Contract Job Change Request Template
Organizational Relationship	Employee
Country	United States
*Empl ID	<input type="text" value=""/>
*Employment Record Number	0 (Business Services Professional) ▼
*Job Effective Date	08/13/2020 [B]
*Action	<input type="text" value=""/> ▼
*Reason Code	<input type="text" value=""/> ▼

Entering Transaction Details

The Transaction detail values can vary depending on the change you are making, or template your are using.

1. Verify you have the correct employee.
 - a. Right-click the Related Actions wedge displayed next to the employee’s name, and click **CU Person Organizational Summary**. Additional information about the employee is displayed, including Person ID (Empl ID) and Department.
 - b. Close the window to return to the Enter Transaction Details page.
2. In the **Job Effective Date**, type or select the effective date of the job change. The default is today’s date.

Entering an Action and Reason Combination

HCM templates are designed to help you enter accurate information and avoid mistakes. Selecting an Action and Reason gives the system information it needs to provide you with appropriate defaults as well as determine the correct approval workflow for the transaction.

1. From the **Action** dropdown list, select the type of action you are taking:
 - Data Change
 - Pay Rate Change
2. From the **Reason Code** dropdown list, select the reason for the change:
 - **Data Change Reasons:**
 - Change Appointment End Date
 - Expected End Date
 - Non Contract Reappointment (Non-contract employees only)
 - Other – Comment Required
 - Reappointment. If you indicated that this transaction was on a new contract, the Action of Data Change and Reason of Reappointment is already selected for you.
 - **Pay Rate Change Reasons:**
 - Base Pay – Decrease in Pay
 - Base Pay – Increase in Pay
 - Demotion
 - Pay Component Distribution Adj (Non-contract employees only)
 - Partial-Leave Contracts (Contract paid employees only)
 - Percent of Time Change. (Select this reason to change the compensation after changing percent of time in position.)
 - Promotion
 - Restore Pay
 - Sabbatical (Contract paid employees only)
 - Temp Pay – Increase in Pay
 - Temp Pay – Decrease in Pay
3. Click **Continue**. The Enter Transaction Information page appears.

Entering Transaction Information

Depending on the selected Action and Reason, you can edit only those fields that are editable for the transaction. Click one of the following links for more details about your selected Action and Reason:

- [Data Change: Change Appointment End Date](#)
- [Data Change: Expected End Date](#)
- [Data Change: Non Contract Reappointment](#)
- [Data Change: Other – Comment Required](#)
- [Data Change: Pay Group Change](#)
- [Data Change: Reappointment](#)
- [Pay Rate Change](#)

Data Change: Change Appointment End Date

The Appointment End Date is used for reporting purposes, to calculate encumbrances, and other campus-specific reasons. To change an appointment end date:

1. Scroll down to the Employment – Additional Data section, and select or enter a new **Appointment End Date**. A message appears indicating that this date is not used for Auto Term.

The screenshot displays the 'Employment - Additional Data' section of a web application. The 'Appointment End Date (Not Used for Auto Term)' field is highlighted with a red border and contains the date '05/31/2021'. A message box is overlaid on the right side of the form, containing the text: 'Appointment End Date (1000,31307) This entry date will not be used in the auto termination process.' and an 'OK' button. Below the message box, the 'Work Location - Expected Job End Date' section is visible, followed by the 'Comments' section with a 'Job Notes' text area. At the bottom, there is an 'Attachments' section with a message 'You have not added any attachments.' and an 'Add Attachment' button. The footer of the form includes a link 'Return to Enter Transaction Details Page' and four buttons: 'Save and Submit', 'Save as Draft', 'Cancel', and 'Save and Submit for Approval'.

2. Click **OK**.
3. Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
4. Continue to [saving and submitting for approval](#).

Data Change: Expected End Date

The Expected End Date is the date on which an employee will be automatically terminated in HCM. Refer to *Auto Term Step-by-Step Guide* for more information.

To change the Expected End Date:

1. Scroll down to Work Location – Expected Job End Date, and select or enter a new **Expected Job End Date**. A message appears confirming that you want the expected end date (EED) to be evaluated as part of the Auto Term Process.

The screenshot shows a web form titled "Work Location - Expected Job End Date". At the top, there is a section for "Expected Job End Date (Used for Auto Term)" with a text input field and a calendar icon, highlighted by a red rectangle. Below this is a "Comments" section with a "Job Notes" field. A message box is open, displaying the text: "Expected Job End Date (1000,31305) By entering this date, you are requesting to have this EED be evaluated at the time the End Job Automatically process runs to determine if they are eligible to be automatically terminated." The message box has an "OK" button. At the bottom of the form, there are buttons for "Save and Submit", "Save as Draft", "Cancel", and "Save and Submit for Approval".

2. Click **OK**.
3. Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
4. Continue to [saving and submitting for approval](#).

Data Change: Non Contract Reappointment

For non-contract employees, you can update certain information to create a non-contract reappointment. You can update pay group, employee type, and compensation information. You can also enter an Appointment End Date and Expected End Date, on which an employee may be automatically terminated in HCM. Refer to *Auto Term Step-by-Step Guide* for more information.

To enter a non-contract reappointment:

1. Scroll down to Job – Payroll Information.
2. Update the following fields, as needed:
 - Pay Group.
 - Employee Type.
 - Compensation Frequency.
 - Pay Components. (Comp Rate Code, Compensation Rate, and Compensation Frequency)
 - Appointment End Date.
 - Expected End Date.

Job - Payroll Information	
Pay Group <input type="text" value="USX"/>	Employee Type <input type="text" value="Salaried"/>
Tax Location Code <input type="text" value="DENVER"/>	
Job Compensation - Payroll Currency and Frequency	
Compensation Frequency <input type="text" value="Monthly - Salary"/>	
Job Compensation - Pay Components	
Comp Rate Code <input type="text" value="BASEM - Base Monthly"/>	Compensation Rate <input type="text" value="4583.330000"/>
Compensation Frequency <input type="text" value="Monthly - Salary"/>	
Job Compensation - Pay Components - 2	
Comp Rate Code <input type="text"/>	Compensation Rate <input type="text"/>
Compensation Frequency <input type="text"/>	
Job Compensation - Pay Components - 3	
Comp Rate Code <input type="text"/>	Compensation Rate <input type="text"/>
Compensation Frequency <input type="text"/>	
Employment - Additional Data	
Appointment End Date <input type="text"/>	
(Not Used for Auto Term)	
Work Location - Expected Job End Date	
Expected Job End Date <input type="text"/>	
(Used for Auto Term)	
Comments	
Job Notes <input type="text"/>	

3. Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
4. Continue to [saving and submitting for approval](#).

Data Change: Other - Comment Required

To enter an other data change:

1. Scroll down to Job Information – Employee Classification, where the first editable field appears.
2. Update the following fields, as needed:
 - Officer Code.
 - FLSA Status.
 - Pay Group. 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.
 - Employee Type.
 - Tax Location Code.
 - Compensation Frequency. For contracts, this field is display only with a value of C displayed.
 - Comp Rate Code. For contracts, this field is display only with a value of BASEC displayed.
 - Compensation Rate.
 - Appointment End Date.
 - Expected End Date.
3. Because comments are required, enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
4. Continue to [saving and submitting for approval](#).

Data Change: Pay Group Change

To enter a pay group data change:

1. Scroll down to Job– Payroll Information, where the first editable field appears.
2. Update the following fields, as needed:
 - Pay Group.
 - Employee Type.
 - Compensation Frequency. For contracts, this field is display only with a value of C displayed.
 - Comp Rate Code. For contracts, this field is display only with a vale of BASEC displayed.
 - Compensation Rate.
 - Appointment End Date.
 - Expected End Date.
5. Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
6. Continue to [saving and submitting for approval](#).

Data Change: Reappointment

If you indicated that this transaction was for a contract employee on a new contract, the Action of Data Change and Reason of Reappointment were selected for you.

From the Enter Transaction Details page you can update the following fields:

- Compensation Rate. Enter the amount paid over the payment term of the contract.
- Appointment End Date.
- CU Contract End Date. This is the date of the last payment and the contract ends.
- Expected End Date.
- Contract Term Period.
 - Select the term from Contract Term Period. The system supplies the CU Contract End Date as well as details in the CU Faculty Contracts section from the contract crosswalk.
 - Select Default Appointment Period to enter your own Contract End Date. The system supplies Contract End Date and Termination Date in the CU Faculty Contracts section.
 - Select Null (blank Contract Term Period option) to clear the additional detail in CU Faculty Contracts, but not Effective Date and Contract Begin Date. To change these dates, you must click Cancel and start over with a new Effective Date.
- Effective Date. (CU Denver Only.)

Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.

Continue to [saving and submitting for approval](#).


Pay Rate Change

To enter a pay rate change:

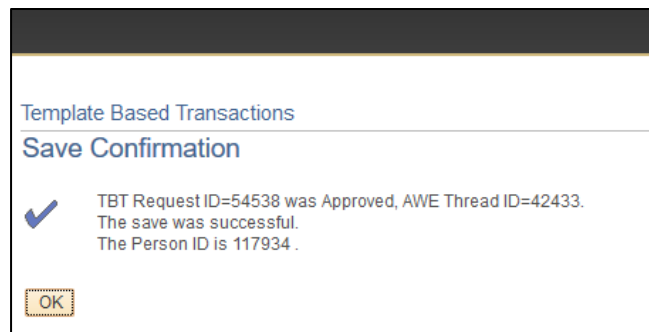
1. Scroll down to Job–Payroll Information, where the first editable field appears.
 2. Update the following fields, as needed, depending on the Reason selected for the pay rate change:
 - Pay Group
 - Employee Type
 - Compensation Frequency
For contract employees, system displays Contract and is not editable.
 - Comp Rate Code
For contract employees, system displays BASEC and is not editable.
 - Compensation Rate
 - Type the compensation rate that is correct for the employee type. (Hourly rate or annual salary)
 - For contracts, type the amount paid over the payment term of the contract.
 - Additional Pay Components. If applicable. Pay Components 2 and 3 let you specify other components of pay (for non-contract employees only). These fields are not editable for an increase or decrease in base pay, or for a percent of time change.
- Note:** The values you select for Compensation Frequency and Compensation Rate Code must be compatible with the type of employee (hourly or salaried) and that employee's pay cycle (bi-weekly or monthly) and paygroup. Refer to [Valid Compensation Frequency and Compensation Rate Code Combinations Job Aid](#) for a listing of valid combinations of these values.
3. Enter any comments in the **Job Notes** field. When this transaction is approved, these comments populate Job Notes in Job Data.
 4. Continue to [saving and submitting for approval](#).

Saving and Submitting for Approval

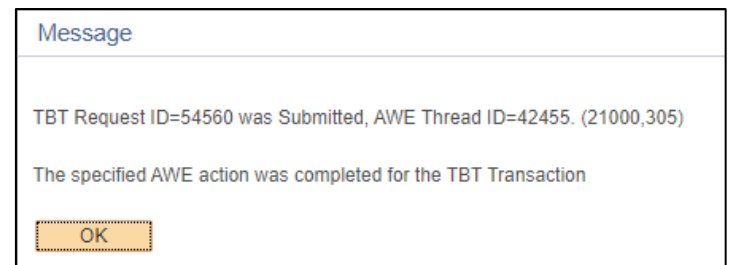
After completing your job change entry, save your transaction and submit it for approval:

1. If needed, attach documents:
 - a. Click **Add Attachment**.
 - b. In **Attachment Title** field, type a name for this document.
 - c. Click **Add** .
 - d. Click Choose **File**.
 - e. Select a file and click **Open**.
 - f. Click **Upload**.
2. Click **Save and Submit for Approval**. A message appears with the Request ID. Make a note of the request ID so you can find information about it later. The message will vary depending on whether your campus requires approval for the job change transaction. Below are examples of a messages, one for a transaction that is self-approved and one for a transaction that requires approval.

Example of Save Confirmation message for self-approved transaction:



Example of Message box indicating a transaction has been submitted for approval:



3. Click **OK** from the message box. If approval is required for the transaction, a Further Processing Required page appears.
4. Click **OK**. The system returns you to the Enter Transaction Details page; however, it is not updated with new information.

Next Steps

Checking Status, Completing Drafts or Pushbacks

If your transaction requires approval, you may want to check its status in the approval workflow. Additionally, if you saved a transaction as a draft, or if a transaction has been pushed back for more information, you can update it and submit it for approval. Refer to [Transaction Status, Drafts, and Pushbacks Step-by-Step Guide](#) for more information.

Checking Contract Information

You should review the contract details and make sure the contract information is correct after the job runs (usually overnight). To check whether a pay rate change was successful, look at future projected payments on the Contract Payment Details page.

Navigation: **NavBar**> **Navigator**> **Payroll for North America**> **Employee Pay Data USA**> **Contract Payment Details**.

What to Look For:

- At the top of the page, notice the Contract ID number, the contract status (Active), and whether the contract is waiting to be recalculated. When a change is made to a contract amount or parameters, **Recalculate Contract** displays **Yes**.
- If a contract has had a change, the row under **Contract Payment Sequence** displays a new sequence number and the effective date of the change.
- The **Contract Information** section displays the type of contract, parameters of the contract and the contract worth.
- The **Projected Earnings** tab displays the currently projected pay for the employee throughout the length of the contract.
- The **Actual Earnings** tab displays all the contract amounts confirmed in a payroll, including all off-cycle payments.