

# Human Capital Management: Step-by-Step Guide

## Making a Pay Rate Change

This guide describes the process for entering a Pay Rate Change using an ePAR Pay Action.



**Contract Pay:** If you are making a pay rate change to an existing contract, or reappointing an employee with a new contract, refer to *Working with Contracts Step-by-Step Guide*, which contains guidelines and details specific to changing compensation for an active contract, as well as using a pay rate change to create a new contract for reappointments.

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## Before You Begin

### Information You Will Need:

- Empl ID.
- Effective Date.
- Action and Reason associated with your change.

**Note:** 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.

- Know whether your Action is a Data Change, a Pay Rate Change, or both.
  - **Data Changes:** Demotion, Promotion, Temp to Perm, To Classified, To Faculty, To Student, To University Staff
  - **Pay Rate Changes:** Base Pay – Decrease in Pay, Base Pay – Increase in Pay, Percent of Time Change, Reappointment, Restore Pay, Temp Pay – Increase in Pay, Temp Pay – Decrease in Pay. For details about reappointments and contract-related items, refer to *Working with Contracts Step by-Step Guide*.
  - **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.
- Whether the employee is on, or going on, a contract. Refer to *Working with Contracts Step-by-Step Guide* for details about changing contract pay.
- SpeedTypes associated with funding.

### Tips for Data Entry:



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 valid values from which you can select.



The book and checkmark lets you spell check the content of a text box.



The trash can lets you remove an item.



The down arrow lets you hide, or collapse, sections you do not want to view. Click the ► right arrow to expand a section.

## Choosing Your Method of Entry: Standard or Expert Entry

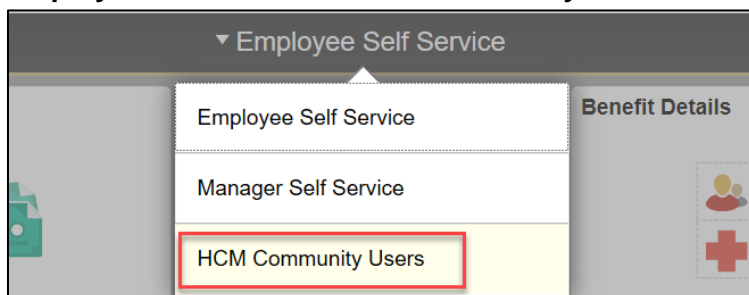
When creating Pay Rate Change transactions in HCM, you can choose to use the standard method or Expert Entry. The standard method takes you through several pages to enter data, while Expert Entry lets you create ePAR Pay Rate Change transactions from a consolidated entry page. Using Expert Entry saves time and keystrokes through avoiding Next and Previous buttons.

Using Expert Entry, you only need to scroll through one page, with a few exceptions (employees on contract). This feature is advantageous when you have mass entries for pay rate changes. You can perform Expert Entry by clicking Expert Add under the ePAR Pay Rate Change actions, or you can still choose the multiple pages version by clicking Add. Both methods are noted in this guide. You can also toggle, or switch back and forth, between ePAR Expert Add and ePAR Add entry methods.

## Beginning the Transaction

1. Navigate to ePAR Pay Actions.

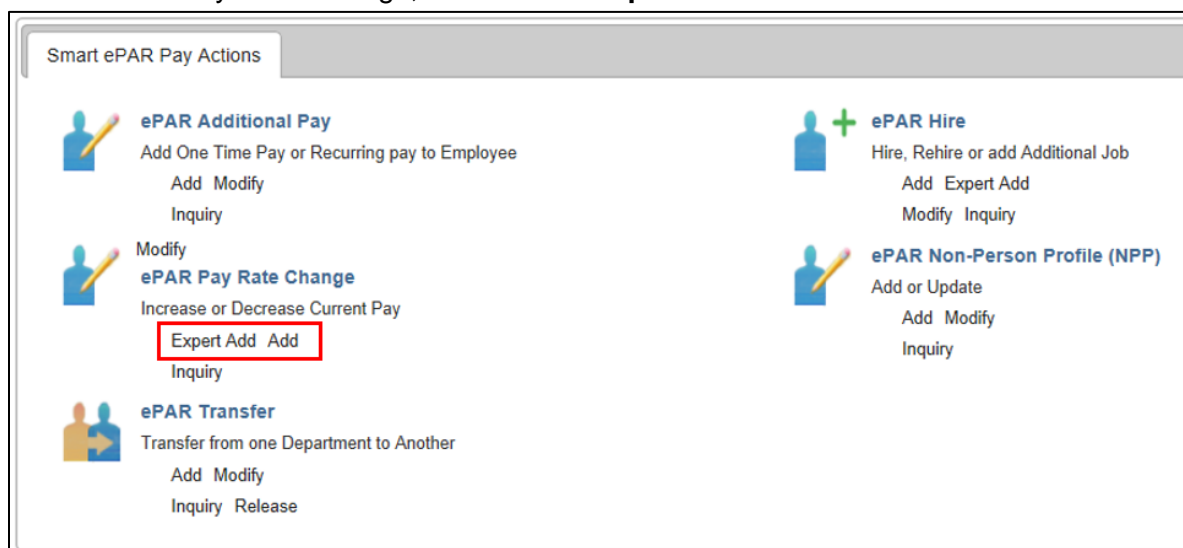
- a) Go to HCM Community Users dashboard: **NavBar> CU Resources> Business Tools> HCM> Employee Self Service> HCM Community Users**



The HCM Community Users dashboard appears.

- b) Click the **Pay Actions** tile.

2. Under ePAR Pay Rate Change, click **Add** or **Expert Add**.



## Step 1: Employee Selection

1. Enter the employee's search criteria, and click **Search**.
2. Select the checkbox next to the employee record, and click **Next**.

▼ Search Criteria

Empl ID: 
First Name: 
Last Name: 
Department: 
Position Number:

Search

Clear

Search Results

	Empl ID	First Name	Last Name	Empl Record	Effective Date	Eff Seq	Position Number	Description	Department	Description	Job Code
<input type="checkbox"/>				0	06/01/2016	0	00158712	Professor	10234	Dept of Art and Art History	1101
<input checked="" type="checkbox"/>				1	07/02/2016	0	00007329	Asst Professor	40090	Library	1103

Next

The page displays current and future dated rows. Rows that are not available for selection appear grayed out.

## Step 2: Action/Reason

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.

**Note:** If you are entering a transaction with an effective date that is past a future-dated rehire transaction, then enter effective date before selecting the Action and Reason, otherwise the system will generate an error. It is a good practice to always enter the effective date first.

1. In the **Effective Date** field, type or select an effective date.
2. From the **Action** list box, select either **Data Change** or **Pay Rate Change**.

▼ Action/Reason Selection

\*Action:

\*Reason:

Old Effective Date:

Old Effective Sequence:

\*Effective Date:

Effective Sequence:  Fiscal Year:

- From the **Reason** list box, select the reason for this data or pay rate change.

Depending on which Action code you choose, the Reason code choices change, as shown below:

**Action/Reason Selection**

\*Action: Data Change

Old Effective Date: 12/01/2015

\*Effective Date: 12/22/2015

Comments:

\*Reason: Demotion, Promotion, Temp to Permanent, To Classified, To Faculty, To Student, To University Staff

Previous Next

**Action/Reason Selection**

\*Action: Pay Rate Change

Old Effective Date: 01/04/2016

\*Effective Date:

Comments:

\*Reason: Base Pay - Decrease In Pay, Base Pay - Increase in Pay, Percent of Time Change, Reappointment, Restore Pay, Temp Pay - Increase in Pay, Temp Pay Decrease in Pay

Previous Next

- Notice that the **Profile Type** dropdown appears after you select the Action: Data Change combination. The system displays a default of the employee's current Profile Type.

**Action/Reason Selection**

\*Action: Data Change

Old Effective Date: 12/26/2015

\*Effective Date:

Profile Type: Univ Staff Pos Profile Templ

Comments:

\*Reason: Demotion

Old Effective Sequence: 0

Effective Sequence: 0 Fiscal Year:

Previous Next

- Click **Next**.

## Step 3: Job Information

When using standard entry, you will need to proceed through several pages to create the transaction. If you are using Expert Entry, you will see several of these pages (Job Information, Compensation, and Department Budget) have been consolidated into one page.

1. Review the fields in the New Value column under the Work Information and Job Information sections to confirm they are correct.

	Current Value	New Value
Job Code:	2348 External Relations Prof	2348 External Relations Prof
Regular/Temporary:	Regular	Regular
Full/Part Time:	Full-Time	Full-Time
Standard Hours:	20.00	20.00
Classified Indicator	Officer/Exempt/Professional	Officer/Exempt/Profession
Empl Class:	1 Unv Fac/	1 Unv Fac/
Officer Code:	None	None
FTE:	0.500000	0.500000
FLSA Status:	Exempt	Exempt
Pay Group:	USX University Staff Exempt	USX University Staff Exempt
FICA Status:	Subject	Subject
Employee Type:	Salaried	Salaried

**Note:** If position data is not correct, do not make any changes to the ePAR form. Close the form and navigate to Position Data to make the changes directly in position. When you update position, ensure the Update Incumbents checkbox is selected. This will create a row with the updated position data in the employee's job data record. If the Update Incumbents checkbox is not selected, it will break the link between position and job data. Refer to *Updating a Position Step-by-Step Guide* for more information.

The following table lists fields that may be opened for a New Value, depending on your action and position:

Work Information Fields	Job Information Fields
<ul style="list-style-type: none"> <li>• Position Number</li> <li>• Position Title</li> <li>• Reports To</li> <li>• Appointing Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Job Code</li> <li>• Regular/Temporary</li> <li>• Full/Part Time</li> <li>• Standard Hours</li> <li>• Classified Indicator</li> <li>• Officer Code</li> <li>• FLSA Status</li> <li>• Union Code (do not use)</li> <li>• Pay Group</li> </ul>

2. Click **Next**. (Standard entry only.)

## Step 4: Compensation

1. Make your changes in the **New Pay Components** section.

As previously mentioned, HCM allows edits to only those fields that are applicable for the Action, Reason, and Profile Type.

The following table lists those fields that may be opened for a New Value:

Compensation Fields	Job Pay Components
<ul style="list-style-type: none"> <li>• Comp Freq (For Contract Pay, select C for Contract)</li> </ul>	<ul style="list-style-type: none"> <li>• Rate Code (For Contract Pay, select BASEC)</li> <li>• Comp Rate</li> </ul>

2. Click **Next**. (Standard entry only.)

## Step 5: Department Budget

Unless you are changing pay for a contracted employee, the last step (Step 5) in the pay rate change is the funding. For information about changing contract pay, refer to *Working with Contracts Step by-Step Guide*.

1. If there is a change to funding, deselect the checkbox next to **New Funding Same as Current Funding?** to clear the current funding fields. Make any necessary changes to the funding by clicking the **Amt** or **Pct** option.

If you deselect the New Funding Same as Current Funding checkbox, you will see the following **New Funding** fields opened up for update:

If you choose **Amt**:

- Budget Amount
- Department
- Combination Code
- Funding End Date


If you choose **Pct**:

- Department
- Combination Code
- Distribution %
- Funding End Date

If you add additional SpeedTypes, the values for Distribution % must total 100%. You can add rows by clicking the plus button.

**Note:** For Data Change updates, you will be prompted to update the Non-Person Profile/Position. Refer to *Creating or Updating a Non-Person Profile Step-by-Step Guide* for more information. 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 unselected.

## Step 6: Saving and Submitting

1. Click **Save**.  A message appears with your ePAR PAY number.
2. Click **OK**.

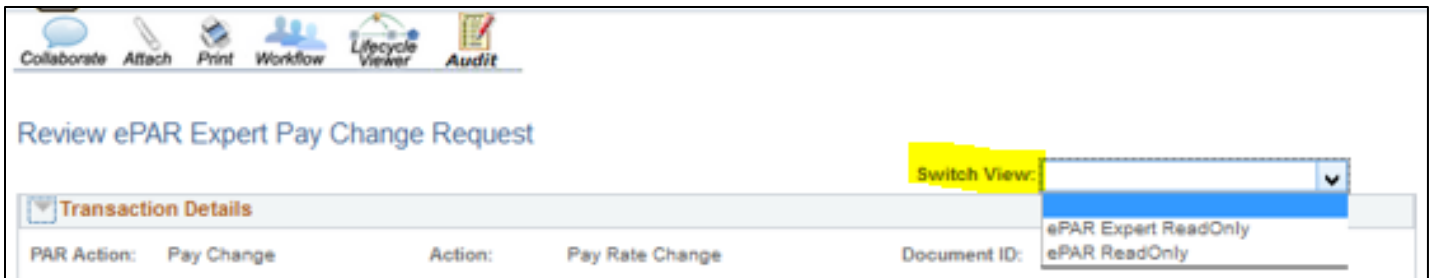
3. Click **Submit**.



After the transaction is saved, there are two methods to view the ReadOnly or Expert ReadOnly views. See page 8 for more information about reviewing your transaction.

## Toggle Between ePAR Expert ReadOnly and ePAR ReadOnly

After the transaction is saved there are two methods to view the ReadOnly or Expert ReadOnly views. You can toggle ePAR transaction views by selecting the view you want from the **Switch View** list box.



Collaborate Attach Print Workflow Lifecycle viewer Audit

Review ePAR Expert Pay Change Request

Switch View: ▼

Transaction Details

PAR Action: Pay Change Action: Pay Rate Change Document ID: ePAR Expert ReadOnly ePAR ReadOnly



When ePAR Expert ReadOnly view is selected, the entire form is displayed:

Collaborate Attach Print Workflow ePARs Audit

**Review ePAR Expert Pay Change Request**

Switch View:

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**Transaction Details**

PAR Action: Pay Change	Action: Pay Rate Change	Document ID: ePAR Pay Rate Change
Request ID: [REDACTED]	Reason Code: Base Pay - Increase in Pay	Document Instance: 00241
ePAR Status: Approved	Effective Date: [REDACTED]	Document Status: System Update / Completed <input type="button" value="C"/>
Risk Level: Medium <input type="button" value="D"/>	Effective Seq: 0	Coll: <input type="button" value="M"/> <input type="button" value="C"/>

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**Employee Details**

Name: [REDACTED]	Emp ID: [REDACTED] <input type="button" value="C"/>	Emp Mod: <input type="button" value="C"/> <input type="button" value="C"/>
Profile Type: Historical ePARs	Profile ID: Pending ePARs	Last Personnel Action:
		Last Transaction Date:

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**Action/Reason Selection**

Action: Pay Rate Change <input type="button" value="C"/>	Reason: Base Pay - Increase in Pay <input type="button" value="C"/>
Old Effective Date: 07/15/2016	Old Effective Sequence: 0
Effective Date: 09/15/2016	Effective Sequence: 1 Fiscal Year: 2017
Comments: <input type="text"/>	

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**Work Information**

Job Indication: Primary Job	New Value: Primary Job
Position Number: 0062180	0062180
Position Title: IT Director	IT Director
Department: 50112 University Information Systems	50112 University Information Systems
Location Code: SUCA Office of the President	SUCA Office of the President
Reports To: 00550007 Assoc Vp & Chief Info Officer-Scott Munson	00550007 Assoc Vp & Chief Info Officer-Scott Munson

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**Job Information**

Job Code: 2480 IT Director	New Value: 2480 IT Director
Regular/Temporary: Regular	Regular <input type="button" value="C"/>
Full/Part Time: Full-Time	Full-Time <input type="button" value="C"/>
Standard Hours: 40.00	40.00
Classified Indicator: Officer/Exempt/Professional	Officer/Exempt/Profess <input type="button" value="C"/>
Emp Class: 1 Univ Fac	1 Univ Fac
Officer Code: None	None
P F I: 1.000000	1.000000
FLSA Status: Exempt University Staff Exempt	Exempt <input type="button" value="C"/>
Pay Group: USX	USX University Staff Exempt
FICA Status: Subject	Subject
Employee Type: Salaried	Salaried <input type="button" value="C"/>

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**Job Pay Components**

<b>Current Pay Components</b>		<b>New Pay Components</b>	
Rate Code	Comp Rate	Rate Code	Comp Rate
1 BASM	12000.000000	1 BASM	12300.000000

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**Current Position Finding**

When the ePAR ReadOnly view is selected, you have to click the **Next** and **Previous** buttons to view all of the pages.

The Global Inquire Console search page lets you choose between Expert ReadOnly and ReadOnly Views.

1. Navigation: **Main Menu> Smart PAF> Inquire ePAR Transactions**
2. Enter **ePAR #** and click **Search**.
3. From the **View Name** list that appears next to the record you want to view, select your method for viewing and click **Search**.