HCM Upgrade [1]

Job Change, Pay Rate Change and Leave of Absence upgrade overview

On Nov. 9, Job Change, Pay Rate Change and Leave functions will transition to Template-Based Transactions (TBT) in HCM, along with additional updates.

Transitioning to template-based transactions remains a high priority for the University of Colorado.

- For HCM users, it streamlines navigation and data entry and provides a user experience consistent with the processes for Hire, Rehire, Additional Job, POI, Transfer and Termination. These new transactions will be available on the Transaction Launch Page.
- For CU’s technical teams, it minimizes the effects of Oracle’s HCM system updates and changes, and keeps CU in compliance for support purposes.

What is changing?

- **Template-Based Transactions:** ePAR Job Change function, Pay Rate and Data Change functions and Leave (Leave of Absence and Short Work Break) will be completed as template-based transactions.
- **Changes to existing TBTs:** Retrofits to existing TBTs will reduce manual effort and processing time.
  - **Work study:** Rather than going into custom process pages, users can identify work-study employees while creating a position.
  - **Auto-termination returns:** Users will be able to enter an expected termination date for an employee during the hire process or during the course of the employee’s employment. The date can be managed, as needed. When the date is reached, the employee’s record will be terminated. This reduces manual effort in processing routine, seasonal positions. Robust logic will ensure people occupying benefits-eligible positions won’t be automatically terminated.

Upcoming Town Halls

Town Halls provide users a demo of the upgrade, how to navigate these new resources and ask questions. Campus change agents and an Employee Services representative will attend each virtual event. Registration will open soon; save the date for your campus Town Hall.

**Colorado Springs**
Oct. 5
Understanding coming changes

In the lead up to Nov. 9, we’ll provide resources to help you prepare and feel ready. Check this page for blogs explaining changes, guides for the new processes and hands-on courses that will allow you to practice new processes.

Blogs
Coming soon!

Guides
Coming soon!

Courses
Coming soon!

Completed Projects

Terminations Update
Template-Based Transactions Update overview

The Separations ePAR transitioned to the Template-Based Transactions (TBT) framework. The TBT is now consistent with the business processes for Hires, Rehire, Additional Jobs and Transfers.

This update reduces transaction times, gave users access to functions and features that streamline business processes, helps to minimize the effects of vendor updates and keeps CU in compliance with Oracle for support.

The following changes to Terminations functionality have occurred:

- The SmartERP Separations form is no longer visible to users. Users must instead click the Transaction Launch page tile in the employee portal.
- Users now use the Transaction Launch Page to initiate a Termination transaction.
- While finding the person being terminated, users now select the new Termination value within the dropdown list in the required Search Option field.
- Once a Termination transaction is entered, it is routed for approval.
- Based on campus feedback, we’ve added row-level security, so you’ll only see your campus’ employees in the search results.

Resources

Blogs
Walk through upcoming ePAR upgrade, then see how to prepare [2]
ePAR to upgrade on Feb. 13 [3]

See all blogs [4]

Guides
Terminating an Employee [5]

View all guides [6]

Skillsoft Courses
HCM Termination demo and exercise [7]

Recruit and Hire Improvements
Recruit and Hire changes overview

The system has migrated away from Smart ePAR transactions for Transfers, Person of Interest (POI), Hires, Rehires and Additional Job to the use of delivered functionality. These changes have streamlined the user experience and allow for effective completion of business functions.

Preparing to hire: This release has not changed the tasks or information needed prior to completing a hire. Personnel Payroll Liaisons (PPLs) must continue to ensure the position and funding are prepared before initiating a Hire, Rehire, Additional Job or Transfer.

The following changes to Hire, Rehire, Additional Job and Transfer functionality in HCM have occurred:

- The Hire ePAR form has been removed.
- A new Transaction Launch Page provides guided navigation to Template Based Transactions.
- The Transfer templates are now accessed from the Transaction Launch Page to maintain alignment with Hire, Rehire and Additional Job.

New Features

- A different look and feel
- Streamlined navigation for faster transaction time
- Position information populates automatically when the Position number is entered in the template
- A Transaction Launch Page takes users to templates
- Attachments can be added to the templates
- Expanded use of the Related Content functionality
- Integration with applicant tracking systems Taleo and Avature (used by CU Boulder) for information gathered during recruiting
- Comments (Job Notes) go to Job Data
- System validations to prevent contract set-up errors (such as an overlapping contract) before the transaction is saved
- An updated Transfer template that matches Hire, Rehire and Additional Job

Resources
Person of Interest (POI) changes overview

What is a POI?

A POI is someone affiliated with the university who is not paid by the university as an employee. We create a “person of interest” in HCM for a number of reasons including granting access to university systems, providing access to training, providing credentials to volunteers, etc.

What's changing with POI?

- New controls will be added so a POI record cannot be created for an individual who has been terminated from the university as not eligible for rehire.
- A POI’s sponsor will be more accurately captured. Currently, the last person who edits the POI’s record is noted as the sponsor, which is not always accurate. With this addition, the POI’s sponsor will be noted by the position the sponsor is fulfilling.
- A Social Security number will not be a required field on the POI form. From a business process standpoint, Social Security numbers will be required for certain POI types including Pre-employment, Security Access or Summer Employment Gap.
- The Planned Exit Date will default to one year from the POI creation date. With this update, it can be changed up to five years from the current date.

POI Training Resources

Get the training you need with exercises, guides and other documents.
Transfer Improvements

Transfer changes overview

What is a transfer?

The transfer transaction is used when an existing CU employee changes position either within their current campus or to another campus.

What's changing with transfer?

- A department gaining a transferred employee will initiate the transaction. The request to release the employee will no longer be needed, as the gaining department will be able to see the employee who is transferring in the system.
- When a transfer transaction is entered, a transferring employee will receive an email notification including steps they must complete with the PPL in their current department to ensure a smooth transition.
- The contract transfer process will be streamlined and simplified to default values and prevent data entry errors.
- The Compensation Rate field will include validation logic based on pay frequency to prevent data entry errors.
- A new Related Content feature will be available throughout the Transfer transaction, allowing users to view relevant information. For example, when transaction details are entered, the current job information for the employee being transferred can be viewed as read-only. This will allow the user to determine the correct employment record.

When associating the position an employee is transferring into, the related content button will show the position summary information (effective date, action reason, status, active head count and budgeted). Position funding information will also be viewable.
Transfer Training Resources

Get the training you need with exercises, guides, Skillsoft courses and other documents.

### Instructional Guides

**Step-by-step Guides**
- Transferring an Employee [14]
- Working with Contracts [25]

**Skillsoft Courses**
- HCM: Fundamentals [19]
- HCM: Paying People [20]
- HCM: Updating Data [21]

**Job Aids**
- Transfer Action and Reason Codes [26]

### Groups audience:

University Information Services

**Source URL:** https://www.cu.edu/uis/projects-initiatives/hcm-upgrade

**Links**
[1] https://www.cu.edu/uis/projects-initiatives/hcm-upgrade
[2] https://www.cu.edu/blog/hcm-community/walk-through-upcoming-epar-upgrade-then-see-how-prepare
[6] https://www.cu.edu/docs/?text=hcm%20development&amp;dept=68933
[12] https://www.cu.edu/docs/sbs-approving-transactions
[14] https://www.cu.edu/docs/sbs-transferring-employee
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