






# Human Capital Management: Step-by-Step Guide

## Creating a University Staff Position

This guide describes how to create and update position data and the non-person profile (job description), and if necessary, prepare to feed data to CU Careers for recruitment. The types of changes you can make include working with vacant positions, reactivating positions, updating positions, creating new positions, and moving position and non-person profile data to CU Careers.

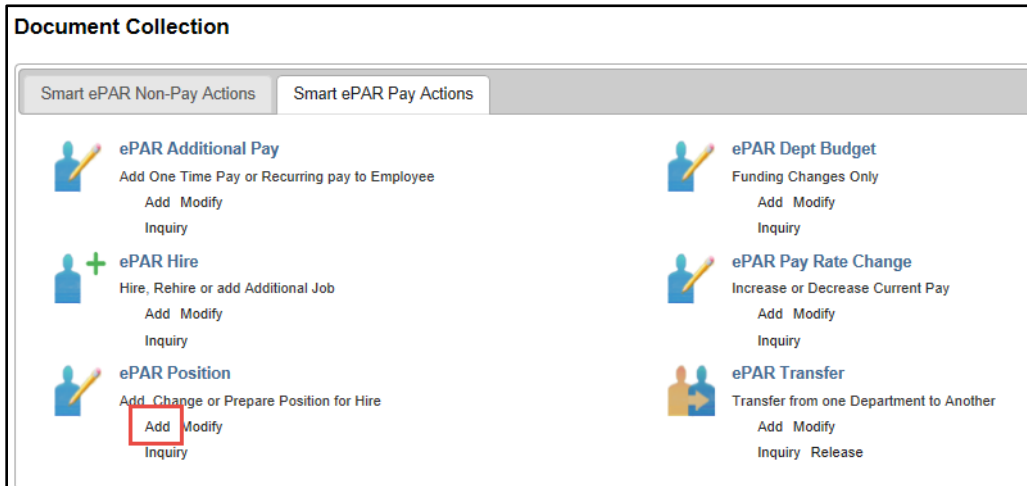
Before you begin, here are a few tips:

- The non-person profile is referred to as NPP throughout this document.
-  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 trashcan lets you remove an item.
-  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

1. Navigation: **Main Menu > Smart Solutions > Document Framework > Document Collection.**
2. Click the **Smart ePAR Pay Actions** tab.
3. Under ePAR Position, click **Add**.



The screenshot shows the 'Document Collection' interface with two tabs: 'Smart ePAR Non-Pay Actions' and 'Smart ePAR Pay Actions'. The 'Smart ePAR Pay Actions' tab is active. It contains several action cards:

- ePAR Additional Pay**: Add One Time Pay or Recurring pay to Employee. Buttons: Add, Modify, Inquiry.
- ePAR Hire**: Hire, Rehire or add Additional Job. Buttons: Add, Modify, Inquiry.
- ePAR Position**: Add, Change or Prepare Position for Hire. Buttons: Add, Modify, Inquiry. The 'Add' button is highlighted with a red box.
- ePAR Dept Budget**: Funding Changes Only. Buttons: Add, Modify, Inquiry.
- ePAR Pay Rate Change**: Increase or Decrease Current Pay. Buttons: Add, Modify, Inquiry.
- ePAR Transfer**: Transfer from one Department to Another. Buttons: Add, Modify, Inquiry, Release.

As you start your transaction, the page displays the number of steps as you progress. In this procedure, you see 1 of 16 (shown below). As you progress through the transaction, the number of steps may change depending on whether you decide to update certain items.

### Create ePAR Position Request

**Step 1 of 16: ePAR - Position Search**

# Step 1: Position Search

To begin searching for a position or to begin creating a new one:

- Under **Select Employee Type**, select the type of action you want to take:
  - Vacant Position:** Choose to update a currently vacant position.
  - Reactivate Position:** Choose to update and reactivate an inactive position.
  - Update/Recruit Filled Position:** Choose to update a filled position or send to CU Careers to begin a search.
  - New Position:** Choose to create a brand new position.

**Note:** When creating a new position, do not update the **New Profile Identifies** or **New Profile Association** (shown later in Step 5-Position Summary). A Profile Create Process will run and update these fields. See screenshot in Step 5.

- Select a **Business Unit** (campus) and press **Tab**. This step is optional; if you know the position number, skip Business Unit.

**Note:** Pressing the Tab key allows HCM to register your data entry before moving to another field. If you click with your mouse and enter data without allowing HCM to register your entry, you may lose what you entered and may have to enter it again.

- Under Search Criteria type or select the department number and press **Tab**. This step is optional; if you know the position number, skip Department.

**Note:** If the Department field does not populate, click the lookup next to the field to search for and select the department.

- Type the position number then press **Tab**.

**Note:** If the position number includes leading zeros (00 or 0000), you must include them.

Select	Position Number	Description
1 <input checked="" type="checkbox"/>	00001766	Accountant II - Business Profe

- Make sure the Select checkbox is selected for your position.

Select	Position Number	Description	Short Description	Business Unit	Department	Job Code
1 <input checked="" type="checkbox"/>	00001766	Accountant II - Business Profe	F/A Sr Pro	UCD	60082	2387

- Click **Next**.

## Step 2: Position Action/Reason

Go to Action/Reason Selection to select your action reason and enter comments about the position update:

- From the **Reason** dropdown select **Vacant Position**.

A screenshot of a web form showing a dropdown menu for the 'Reason' field. The dropdown is open, and 'Vacant Position' is highlighted in blue. The label '\*Reason:' is visible to the left of the dropdown.

**Vacant Position:** This selection is used regardless of whether the position is vacant and ready for recruitment or if you are just updating the NPP. If using CU Careers to recruit and hire a candidate, and collect candidate information, there is a separate checkbox (describe later in this document and process) that directs HCM to feed the data to CU Careers.

A screenshot of two date input fields. The first is labeled 'Old Effective Date:' with the value '08/11/2015'. The second is labeled '\*Effective Date:' with the value '08/27/2015' and a calendar icon to its right.

- Select an Effective Date.

- When feeding positions to CU Careers, the Effective Date must equal today's date or earlier (i.e. it cannot be future-dated).
- When you are doing a direct hire you will need to have the Effective Date prior to the hire date of a new employee.
- When you are just updating the position and there is an incumbent in this position, make sure the Update Incumbents box is selected so it will also update Job data with this information.

A screenshot of a 'Specific Information' section in a form. It contains three rows of checkboxes. The first row is 'Update Incumbents:' with a checked box in the 'Current Value' column and a checked box in the 'New Value' column. The second row is 'Include Salary Plan/Grade:' with an unchecked box in both columns. The third row is 'Budgeted Position:' with a checked box in both columns.

### Notes:

- The Position table does not use Effective Date sequencing. You **can only** use one Effective Date for each action/reason combination on the Position table.
- Profile Type is identified by employment group.

A screenshot of a text input field labeled 'Profile Type:' containing the text 'Univ Staff Pos Profile Templ'.

- Add comments for the purpose of the transaction.

- Click **Next**.

# Step 3: Position-Change

Not all sections in position-change will need to be updated. However, it is recommended that all information is verified before sending the position to CU Careers for recruitment. Only edit the fields below if changes need to be made to update and verify all position information is still valid:

1. Verify all fields.
2. Edit **Position Title**. This will be your working title on the posting.

▼ Position Data		
	Current Value	New Value
Position Title	Accountant II - Business Profe	Accountant II

3. Edit the **Job Information**.

▼ Job Information		
	Current Value	New Value
Business Unit:	UCD Denver Campus	UCD Denver Campus
Job Code:	2387 Finance/Actg Senior Prof	2387 Finance/Actg Senior Prof
Regular/Temporary:	Regular	Regular
Full/Part Time:	Full-Time	Full-Time
Regular Shift:	N	N

4. Edit **Department, Company, Location, Reports To** (required) and **Appointing Authority**.

**Note:** The **Reports To** field must be populated.

▼ Work Information		
	Current Value	New Value
Department:	60082 ADM-AVCFP Finance	60082 ADM-AVCFP Finance
Company:	CU University of Colorado	CU University of Colorado
Location:	2AMCA Anschutz Administration	2AMCA Anschutz Administration
Reports To:	00640527 Business Services Assistant Di	00640527 Dobbins,Thomas Matthew
Appointing Authority:		

5. Edit **Standard Hours**.

▼ Salary Plan Information		
	Current Value	New Value
Salary Admin Plan:	238 Finance and Accounting	238 Finance and Accounting
Salary Grade:	A07 Finance/Actg Senior Prof	A07 Finance/Actg Senior Prof
Standard Hours:	40.00	40.00
FLSA Status:	Nonexempt	Nonexempt

6. Deselect, or clear, **Update Incumbents** if you don't want these updates to apply to the person currently holding the position.

<b>Update Incumbents:</b>	<input checked="" type="checkbox"/>	
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- Update the **Budgeted FTE**, if necessary.

	Current Value	New Value
Budgeted FTE:	1.000000	<input type="text" value="1.000000"/>

- Update **Campus Box**.

CU Position Info		
	Current Value	New Value
Campus Box:		<input type="text"/>

- Click **Next**.

## Step 4: Non-Person Profile Questionnaire

This page of the transaction lets you choose which parts of the non-person profile (NPP) to update. To choose the areas of the non-person profile to update:

- In the **Description** field, update the description to match your Position Title (working title).

Non-person Profile Descriptions		
Description:	Short Description:	
<input type="text" value="Accountant II"/>	<input type="text"/>	

- Type a **Short Description**, which can be an identifier of your choice.
- Select **Yes** for each area of the NPP you want to update.

**Note:** Radio buttons that are greyed out and marked Yes have mandatory fields that must be filled out to save and submit to CU Careers for recruitment. Fields that HCM feeds to CU Careers for **University Staff** include: Position Summary (Job Summary), HR Consultant, Duty Statements (Samples of work), Job Competencies, Minimum Qualifications, Background Check Types, Additional Job Requirements, and Core Competencies. It is also important to check the Required Training as this tracks the position specific training as well as university-wide training.

**Please choose Yes/No for the below Non-Person profile options that you wish to change/add/delete**

Position Summary	<input type="radio"/> Yes <input type="radio"/> No
HR Consultant	<input type="radio"/> Yes <input type="radio"/> No
Duty Statements	<input type="radio"/> Yes <input type="radio"/> No
Essential Functions	<input type="radio"/> Yes <input checked="" type="radio"/> No
Staff Core Competencies	<input type="radio"/> Yes <input checked="" type="radio"/> No
Job Competencies	<input type="radio"/> Yes <input checked="" type="radio"/> No
Minimum Qualifications	<input type="radio"/> Yes <input type="radio"/> No
Preferred Qualification	<input type="radio"/> Yes <input checked="" type="radio"/> No
Required Training	<input type="radio"/> Yes <input checked="" type="radio"/> No
Background Check Types	<input type="radio"/> Yes <input checked="" type="radio"/> No
Additional Job Requirement	<input type="radio"/> Yes <input checked="" type="radio"/> No
Driver's License Type	<input type="radio"/> Yes <input checked="" type="radio"/> No
Driver's License Endorsements	<input type="radio"/> Yes <input checked="" type="radio"/> No
HR Only	<input type="radio"/> Yes <input checked="" type="radio"/> No
Salary Survey Matches	<input type="radio"/> Yes <input checked="" type="radio"/> No
	<input type="radio"/> Select All Yes
	<input type="radio"/> Select All No

4. Click **Next**.

**Note:** The following steps show the process as if you **Select All Yes** in the previous step. If you chose **Yes** for only some pages, skip to the step that correlates to the name you see on the screen.

## Step 5: Position Summary


Update the position summary page (required for CU Careers):

1. To add a new position summary, click **Add New Position Summary** or select the row currently populated to edit existing information. New rows will need to be added when first creating/updating these positions.

Current Position Summary	
ID	Type of Review
NEW	New Position
New Position Summary	
ID	Type of review
NEW	New Position

Add New Position Summary

2. Click the lookup next to **Type of Review**.

Type of Review:  

3. Select one of the following options:

- **New:** Use when creating a new position or adding the job summary for the first time.
- **Vacant:** Use when filling a vacant position or soon to be vacant position.
- **Update Pos:** Choose only if updating a position.
- **Reallocation:** Use for a position change that is **not** a Promotion or Demotion (no change in pay).
- **Promotion:** Use if position change is with more pay/responsibilities.
- **Demotion:** Use if position change is with less pay/responsibilities.

DEMOTION	(blank)	(blank)	Position Change with less pay/responsibilities
NEW	(blank)	(blank)	New Position
PROMOTION	(blank)	(blank)	Positon change with more pay/responsibilities
REALLOCATION	(blank)	(blank)	Position change that is not a Promotion or a Demotion (no chg in pay)
UPDATE POS	(blank)	(blank)	Update an existing position/NPP
VACANT	(blank)	(blank)	Vacant Position

4. Click the lookup next to **Exemption Statute**.

Exemption Statute:  

5. Select appropriate exemption statute.

6. If you are recruiting for the position, click the **Feed to CU Careers?** checkbox. This sends the position to CU Careers once approved. Leave unchecked if you are only updating the position/NPP and not sending to CU Careers for recruitment.

Feed to CU Careers?

7. Enter a **Job Summary**. (This information will feed to CU Careers as part of your job description.)

Job Summary:

**Note:** The Job Summary text box is limited to 1,325 characters.

8. Click **OK**.

9. Click **Add New HR Consultants** (required for CU Careers).

10. Click the lookup next to HR Consultant and select the correct HR Consultant for your campus (refer to your campus HR for more information).

11. Click **OK**.

**Note:** When creating a new position, the New Profile Identities and New Profile Association (shown below) will be blank. Do not update them. The system runs a Profile Create Process and updates these fields.

New Profile Identities			
Profile Identity Option	Key 1 Value	Description	Status
Add New Profile Identities			
Current Profile Associations			
Profile Association	Key 1 Value	Description	Status
New Profile Associations			
Profile Association	Key 1 Value	Description	Status
			Active
Add New Profile Associations			

12. Click **Next**.

## Step 6: NPP-Duties

To identify and add duties of the position (Required to feed to CU Careers):

1. Choose **Add New Duty Statement**.

2. Click the lookup next to **Duties**.

3. Use the search boxes on the top of the screen to find the duty you want to use. Use the Job Code/Job Family list to search by Content Item ID.

Or,

Click the name of the duty from the list at the bottom

Content Type CU\_DUTIES1

Content Item ID begins with FIN

Content Group Type begins with

Content Group begins with

Description begins with

Look Up Clear Cancel Basic Lookup

FIN_ACCT007 (blank)	(blank)	Leads the organization's accounting activities, including financial records and reports.
FIN_ACCT008 (blank)	(blank)	Creating reports on financial performance for internal and external use.
FIN_ACCT009 (blank)	(blank)	Maintaining financial records in accordance with GAAP and organizational standards

4. Verify that the **Rating Model** is **CUUS**.

Rating Model: CUUS University Staff Perf Plan - 5

5. Enter **Percent of time** (optional). **Percent of Time:**

6. Enter the **Description of Work**. This lets you add more detail about how a person might accomplish the duty statement.

Description of Work:

7. To add another duty, click **Apply and Add Another**.

Apply and Add Another

Or,

Click **OK**.

OK

8. Repeat until all duties have been added.

9. Click **Next**.

Next



# Step 7: NPP-Essential Functions

Essential functions describe the requirements of the position. (This field will not feed to CU Careers.) To add essential functions:

- 1. Click **Add New Essential Functions**.



- 2. Click the lookup for **Essential Functions**.



- 3. Use the search boxes on the top of the screen to find the essential function you want to use; then click the name of the duty from the list at the bottom.

Content Type CU\_ESS\_FNCTS

Content Item ID begins with

Content Group Type begins with

Content Group begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100

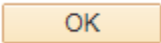
Content Item ID	Content Group Type	Content Group	
ENV_ATMOSP	(blank)	(blank)	Atmospheric Conditions - Expos
ENV_CONFREST	(blank)	(blank)	Confined/Restricted Env - Work
ENV_EXTCOLD	(blank)	(blank)	Extreme Cold - Exposure to non-
ENV_EXTHEAT	(blank)	(blank)	Extreme Heat - Exposure to non-

- 4. To add another essential function, click **Apply and Add Another**.

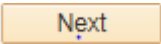


Or,

Click **OK**.



- 5. Click **Next**.



## Step 8: NPP-Core Competencies


Core Competencies will populate from the university staff profile template for existing positions. For new positions you will have to add them. If populated, Core Competencies will feed to CU Careers.

1. Click **Add New Univ Staff Core Competencies**.

[Add New Univ Staff Core Competencies](#)

2. Click the lookup for **Core Competency**.

Core Competency:



3. Select competencies. Be sure to add all six core competencies listed below:

New Univ Staff Core Competencies	
ID	Core Competencies
ACCTABILITY	Accountability
COLLABORAT	Collaboration
COMMUNICTN	Communication
DIV_INCLUSN	Diversity and Inclusion
ETH_INTEGR	Ethics and Integrity
RELATN BLDG	Relationship Building

4. To add another Core Competency, click **Apply and Add Another**.

[Apply and Add Another](#)

Or,

Click **OK**.

[OK](#)

5. Click **Next**.

[Next](#)

# Step 9: NPP-Job Competencies

Job competencies will feed to CU Careers. To add Job Competencies to a position:

1. Click **Add New Job Competency**.



2. Click the lookup for **Job Competency**.



3. Use the search boxes on the top of the screen to find the Job Competency you want to use, then click the name of the job competency from the list at the bottom.

FIN\_ACCT014 (blank) (blank) Knowledge of and ability to use techniques and processes to identify and evaluate costs

Content Type	CU_JOB_COMP		
Content Item ID	begins with	▼	FIN
Content Group Type	begins with	▼	<input type="text"/>
Content Group	begins with	▼	<input type="text"/>
Description	begins with	▼	<input type="text"/>

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-40 of 40 Last

Content Item ID	Content Group Type	Content Group	Description
FIN_ACCT001	(blank)	(blank)	Accountability
FIN_ACCT002	(blank)	(blank)	Knowledge of GAAP and the ability to maintain and prepare financial stmts and reports

4. To add another Job Competency, click **Apply and Add Another**.



Or,

Click **OK**.

5. Click **Next**.

# Step 10: Qualifications

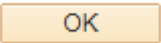
Minimum qualifications must be entered to feed to CU Careers. You can also specify preferred qualifications. To define qualifications:

- 1. Click **Add New Minimum Qualifications.** 

- 2. Click the lookup for **Content Item ID.** 

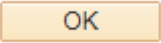
- 3. Click **Minimum Qualifications.**

Content Item ID	Content Group Type	Content Group	Description
US_MINQUAL	(blank)	(blank)	Minimum Qualifications

- 4. Enter all minimum qualifications in the text box.
- 5. Click **OK.**  (Do not click Apply and Add Another.)

- 6. Click **Add New Preferred Qualifications.** 

- 7. Click the lookup for **Content Item ID.** 

- 8. Enter all preferred qualifications in the text box.
- 9. Click **OK.**  (Do not click Apply and Add Another.)

- 10. Click **Next.** 

# Step 11: NPP- Required Training

For existing positions, the Discrimination and Harassment and IT Privacy and Security Awareness trainings are required for all faculty and staff, and will be listed by default. For new positions you will need to add the Discrimination and Harassment and IT Privacy and Security Awareness trainings and any additional required training for that position.

**Add New Required Training**

1. Click **Add New Required Training**.

**Required Training:**



2. Click the lookup for **Required Training**.

3. Select a training option from the list. This is where you can add the Required Training specific to the position.

Content Type CU\_REQ\_TNG

Content Item ID begins with

Content Group Type begins with

Content Group begins with

Description begins with

Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

Content Item ID	Content Group Type	Content Group	Description
U00063	(blank)	(blank)	IT Privacy and Security - User Responsibility
U00067	(blank)	(blank)	Discrimination and Harassment

4. To add another Required Training click **Apply and Add Another**.

Content Item ID	Content Group Type	Content Group	Description
A00001	(blank)	(blank)	General Fin Overview Lecture
A00002	(blank)	(blank)	General GL and PO
A00003	(blank)	(blank)	Core CSC-AP
A00004	(blank)	(blank)	Core CSC-PA
A00005	(blank)	(blank)	Core Financial
A00006	(blank)	(blank)	Core Department
A00007	(blank)	(blank)	General PS HRMS Training
A00008	(blank)	(blank)	Gen PS HR Trng for New Users
A00009	(blank)	(blank)	Campus Employer Time Entry
A00010	(blank)	(blank)	HR/PeopleSoft Refresher Course
A00011	(blank)	(blank)	PS HR Executive Session
A00012	(blank)	(blank)	PS Recruit Workforce Training
A00013	(blank)	(blank)	PS HR Admin Train Session
A00014	(blank)	(blank)	PS HR Admin Train Course

**Apply and Add Another**

Or,

Click **OK**.

**OK**

5. Click **Next**.

**Next**

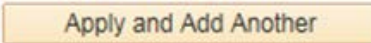
## Step 12: NPP-Background Checks and Additional Information

The following sections describe how to add background checks, job requirements, and driver's license requirements. Background checks and job requirements will feed into CU Careers. The Criminal Background check will be listed for existing positions, but it will need to be added for new positions. To add additional information including the background checks:

1. Click **Add New Background Check Types**. 

2. Click the lookup for **Background Check Type**. 

Content Item ID	Content Group Type	Content Group	Description
CREDIT	(blank)	(blank)	Financial/Credit Check
CRIMINAL	(blank)	(blank)	Criminal Background Check
DRIVING	(blank)	(blank)	Driving Record Check
EPL	(blank)	(blank)	EPLS - Excluded Parties List
OTHER	(blank)	(blank)	Other Background Check
SEX_OFFEND	(blank)	(blank)	Sex Offender Registry Check

3. Select the background check.
4. To add another Background Check Type, click **Apply and Add Another**. 

Or,

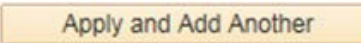
Click **OK**. 

5. Click **Add New Additional Job Requirements** (optional). 

6. Click the lookup for **Additional Job Requirements**. 

7. Select **HIPAA, Hazardous materials, Environmental**, and any other additional job requirements.

Content Item ID	Content Group Type	Content Group	Description
CALL BACK	(blank)	(blank)	Call Back
CAMP_SEC_ATH	(blank)	(blank)	Campus Security Authority
DRUG FREE WK	(blank)	(blank)	Drug Free Workplace
DR_LIC_REQ	(blank)	(blank)	Driver's License Requirement
ESSNTAL SVCS	(blank)	(blank)	Essential Services Designation

8. To add another job requirement, click **Apply and Add Another**. 

Or,

Click **OK**. 

9. Click **Add New Driver's License Type** (optional). 

10. Click the lookup for the **Driver's License Type**.  


Content Item ID	Content Group Type	Content Group	Description
CDL	(blank)	(blank)	Commercial Driver's License
REG	(blank)	(blank)	Regular Driver's License

11. Select the Driver's License Type.

12. Click **OK**.

13. Click **Add New Driver's License Endorsements** (optional).

14. Click the lookup for the **Driver's License Endorsement**.



Content Item ID	Content Group Type	Content Group	Description
HAZ_MATERIAL	(blank)	(blank)	Hazardous Materials Endorsement
MOTORCYCLE	(blank)	(blank)	Motorcycle
PASSENGER	(blank)	(blank)	Passenger Endorsement
SCHOOL BUS	(blank)	(blank)	School Bus Endorsement

15. Select the endorsement.

16. Click **OK**.

17. Click **Next**.

## Step 13: NPP-HR Only

This HR Only section lets HR users add notes about the position and include salary survey matches.

1. Click **Next**.

## Step 14: New Department Budget Table-Position

This section will populate based on current funding for the position if it exists. Verify information is correct or change funding.

1. Choose **Pct** or **Amt**.  Amt  Pct

2. Enter **Department** number and press **Tab** twice.


3. Enter **SpeedType** and press **Tab** twice.

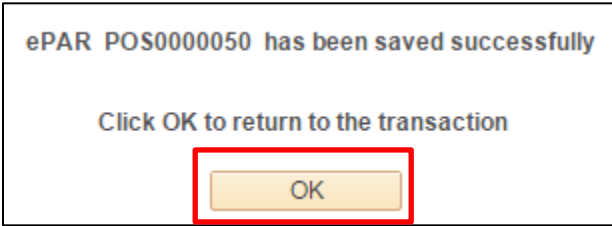
4. Enter **Distribution %** or **Amount**.

5. To add another row, click the plus.

6. To remove a row, click the minus.

# Step 15: Saving and Submitting a Position

- 1. Click **Save** from the top left corner. 



- 2. Click **OK**.

- 3. Click **Submit**. 