

Human Capital Management: Step-by-Step Guide

Entering Job Changes

HCM lets you make changes to an employee's job and position including: Appointment, Campus Box, Supervisor, Appointing Authority, Location, FLSA, Pay Group, Working Title, and Faculty Promotion.

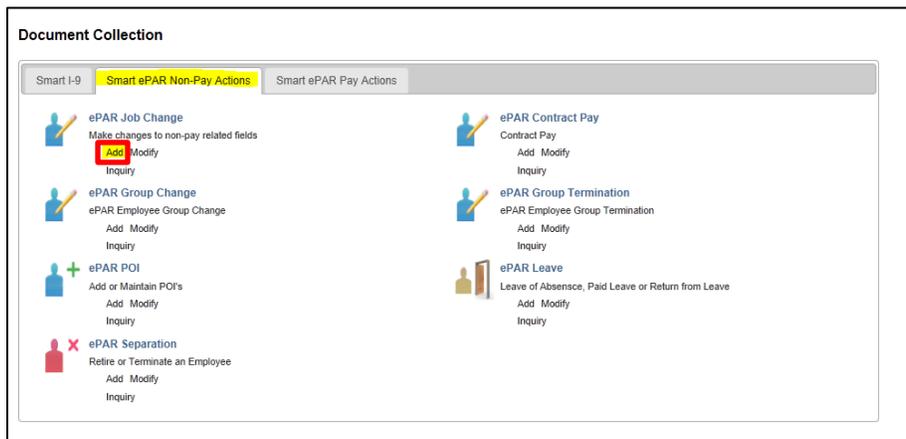
Before you begin, here are a few tips:

-  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

- Navigation: **Main Menu> Smart Solutions> Document Framework> Document Collection.**
- Select the **Smart ePAR Non-Pay Actions** tab.
- Under **ePAR Job Change**, click **Add**.



Step 1: Employee Selection

1. Type the Empl ID, or other search criteria, and click **Search**.

Step 1 of 6: ePAR - Employee Selection

Transaction Details

PAR Action:	Change	Action:	Document ID:	ePAR Job Change
Request ID:	NEXT	Reason Code:	Document Instance:	0
ePAR Status:	Initial	Effective Date:	Document Status:	Initial / Add Entry
		Effective Seq:		0

Search Criteria

Empl ID: Employee Name

First Name:

Last Name:

Department:

Position Number:

2. Select the checkbox for the correct employee's record number.

Step 1 of 6: ePAR - Employee Selection

Transaction Details

PAR Action:	Change	Action:	Document ID:	ePAR Job Change
Request ID:	NEXT	Reason Code:	Document Instance:	0
ePAR Status:	Initial	Effective Date:	Document Status:	Initial / Add Entry
		Effective Date:		08/05/2015
		Effective Seq:		0

Search Criteria

Empl ID: Employee Name

First Name:

Last Name:

Department:

Position Number:

Search Results

Empl ID	First Name	Last Name	Empl Record	Position Number	Description	Department	Description	Job Code	Description
<input checked="" type="checkbox"/>			0	00634928	Instructor	20878	SOM-PEDS CHAP-GenOps	1105	Instructor

3. Click **Next**.

Step 2: Action/Reason

- From the **Action** listbox, select an action code.

Depending on the action code you choose, the reason code choices change, as shown below:

The screenshot shows the 'Action/Reason Selection' form. The '*Action:' dropdown is set to 'Data Change'. The '*Reason:' dropdown is open, showing the following options: Change Appointment End Date, FLSA Change, Other - Comment Required, Pay Group Change, and Service Date Change. The form also includes fields for 'Old Effective Date' (11/22/2015), '*Effective Date', and 'Comments'. 'Previous' and 'Next' buttons are at the bottom.

The screenshot shows the 'Action/Reason Selection' form. The '*Action:' dropdown is set to 'Position Change'. The '*Reason:' dropdown is open, showing the following options: Change Appointing Authority, Change in Pos Title or Desc, Faculty Promotion, Job Re-Classification, Location Change, New Supervisor/Manager, and Other - Comment Required. The form also includes fields for 'Old Effective Date' (11/22/2015), '*Effective Date', and 'Comments'. 'Previous' and 'Next' buttons are at the bottom.

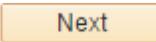
- From the **Reason** listbox, select a reason for the action you are taking.

Depending on which reason code you choose, HCM opens different fields for data entry. For information about what fields are opened, click the links from the table below. For information about which transactions use which action reasons, refer to the *Transaction Pages and Action Reasons* job aid, available from the HCM Community website.

Data Change	Change Appointment End Date
	FLSA Change
	Other - Comment Required
	Pay Group Change
	Service Date Change
Position Change	Change Appointing Authority
	Change in Pos Title or Desc
	Faculty Promotion
	Job Re-Classification
	Location Change
	New Supervisor/Manager
	Other - Comment Required

- Type or select an **Effective Date**. The Effective Date should **not** be the same as the old effective date.

Note: All fields with an asterisk (*) are required.

- Click **Next**. 

Step 3: Job Information

- Under the **New Value** area, type, or select from lookups, the new values for information being changed.

The screenshot shows the HCM Job Information form with the following details:

- PAR Action:** Change
- Request ID:** NEXT
- ePAR Status:** Initial
- Action:** Position Change
- Reason Code:** New Supervisor/Manager
- Effective Date:** 04/01/2015
- Effective Seq:** 0
- Document ID:** ePAR Job Change
- Document Instance:** 0
- Document Status:** Initial / Add Entry

Employee Details:

- Name:** [Redacted]
- Empl ID:** [Redacted]
- Empl Rcd:** 0
- Last Personnel Action:**
- Last Transaction Date:**

Work Information:

Field	Current Value	New Value
Position Number:	00634928	00634928
Position Title:	Instructor	Instructor
Business Unit:	UAMC Anschutz Medical Center	UAMC Anschutz Medical Center
Department:	20878 SOM-PEDS CHAP-GenOps	20878 SOM-PEDS CHAP-GenOps
Location Code:	2AMCA Anschutz Administration	2AMCA Anschutz Administration
Reports To:	00674042 Assistant Professor - CHA/PA D	00007389 Assistant Professor [Redacted]

Step 4: Saving and Submitting

- Click **Save** from the top left corner. 
- After you receive your ePAR Job Change number, click **OK**.

The screenshot shows a success message dialog box with the following text:

ePAR LEA0000175 has been saved successfully

Click OK to return to the transaction

OK

- Click **Submit**. 
- Click **OK**. 

Note: The remaining pages of this guide describe which fields open for update depending on what action reason you selected in Step 2: Action/Reason. Each of the following sections provides a link back to Step 3: Job Information, reminding you to enter an Effective Date and complete Step 4: Saving and Submitting.

Data Change: Change Appointment End Date

Action/Reason Selection

<p>*Action: Data Change</p> <p>Old Effective Date: 12/01/2015</p> <p>*Effective Date: <input type="text" value=""/> <small>Ⓢ</small></p> <p>Comments: <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></p>	<p>*Reason: Change Appointment End Date</p> <p>Old Effective Sequence: 0</p> <p>Effective Sequence: 0 Fiscal Year:</p>
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Using the **Change Appointment Date** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- FLSA Status

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

[Click to return to transaction steps.](#)

Data Change: FLSA Change

Action/Reason Selection

<p>*Action: Data Change</p> <p>Old Effective Date: 12/01/2015</p> <p>*Effective Date: <input type="text" value=""/> <small>Ⓢ</small></p> <p>Comments: <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></p>	<p>*Reason: FLSA Change</p> <p>Old Effective Sequence: 0</p> <p>Effective Sequence: 0 Fiscal Year:</p>
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Using the **FLSA Change** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)

Data Change: Other - Comment Required

▼ Action/Reason Selection	
*Action: Data Change	*Reason: Other - Comment Required
Old Effective Date: 12/01/2015	Old Effective Sequence: 0
*Effective Date: <input type="text" value=""/> [3]	Effective Sequence: 0 Fiscal Year:
Profile Type: Univ Staff Pos Profile Templ	
Comments: <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	
<input type="button" value="Previous"/> <input type="button" value="Next"/>	

Using the **Other – Comment Required** reason code, you will see that the **Profile Type** is displayed in Step 2 of the transaction, and the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- FLSA Status

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

In Step 5 of the **Other – Comment Required** transaction, you will be prompted to update the Non-Person Profile/Position. 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 unchecked, as shown below:

Step 5 of 7: ePAR NPP- JOB Pos Summary

Transaction Details

PAR Action: Change Action: Position Change Document ID: ePAR Job Change
 Request ID: NEXT Reason Code: Faculty Promotion Document Instance: 0
 ePAR Status: Initial Effective Date: 12/15/2015 Document Status: Initial / Add Entry
 Effective Seq: 0

Employee Details

Name: Empl ID: Empl Rcd: 0
 Profile Type: Univ Staff Pos Profile Templ Profile ID: Last Personnel Action:
 Last Transaction Date:

Current Position Summary

ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

New Position Summary

ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

[Click to return to transaction steps.](#)

Data Change: Pay Group Change

Action/Reason Selection

*Action: Data Change *Reason: Pay Group Change
 Old Effective Date: 12/01/2015 Old Effective Sequence: 0
 *Effective Date: Effective Sequence: 0 Fiscal Year:
 Comments:
Previous Next

Using the **Pay Group Change** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)

Data Change: Service Date Change

Using the **Service Date Change** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- FLSA Status

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

[Click to return to transaction steps.](#)

Position Change: Change Appointing Authority

Using the **Change Appointing Authority** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)

Position Change: Change in Pos Title or Desc

Action/Reason Selection

*Action: **Position Change** *Reason: **Change in Pos Title or Desc**

Old Effective Date: 12/01/2015 Old Effective Sequence: 0

*Effective Date: Effective Sequence: 0 Fiscal Year:

Comments:

Previous Next

Using the **Change in Pos Title or Desc** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)

Position Change: Faculty Promotion

Action/Reason Selection

*Action: Position Change *Reason: Faculty Promotion

Old Effective Date: 12/01/2015 Old Effective Sequence: 0

*Effective Date: Effective Sequence: 0 Fiscal Year:

Profile Type: Univ Staff Pos Profile Templ

Comments:

Previous
Next

Using the **Faculty Promotion** reason code, you will see that the **Profile Type** is displayed in Step 2 of the transaction, and the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title

Job Information:

- Job Code
- FLSA Status

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

In Step 5 of the **Faculty Promotion** transaction, you will be prompted to update the Non-Person Profile/Position. 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 unchecked, as shown below:

Step 5 of 7: ePAR NPP- JOB Pos Summary

Transaction Details

PAR Action: Change	Action: Position Change	Document ID: ePAR Job Change
Request ID: NEXT	Reason Code: Faculty Promotion	Document Instance: 0
ePAR Status: Initial	Effective Date: 12/15/2015	Document Status: Initial / Add Entry
	Effective Seq: 0	

Employee Details

Name:	Empl ID:	Empl Rcd: 0
Profile Type: Univ Staff Pos Profile Templ	Profile ID:	Last Personnel Action:
		Last Transaction Date:

Current Position Summary

ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

New Position Summary

ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

[Click to return to transaction steps.](#)

Position Change: Job Re-Classification

Action/Reason Selection

*Action: Position Change *Reason: Job Re-Classification

Old Effective Date: 12/01/2015 Old Effective Sequence: 0

*Effective Date: [] Effective Sequence: 0 Fiscal Year: []

Profile Type: Univ Staff Pos Profile Templ

Comments: []

Previous Next

Using the **Job Re-Classification** reason code, you will see that the **Profile Type** is displayed in Step 2 of the transaction, and the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title

Job Information:

- Job Code
- FLSA Status

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

In Step 5 of the **Job Re-Classification** transaction, you will be prompted to update the Non-Person Profile/Position. 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 unchecked, as shown below:

Step 5 of 7: ePAR NPP- JOB Pos Summary

Transaction Details

PAR Action: Change Action: Position Change Document ID: ePAR Job Change
 Request ID: NEXT Reason Code: Faculty Promotion Document Instance: 0
 ePAR Status: Initial Effective Date: 12/15/2015 Document Status: Initial / Add Entry
 Effective Seq: 0

Employee Details

Name: [] Empl ID: [] Empl Rcd: 0
 Profile Type: Univ Staff Pos Profile Templ Profile ID: [] Last Personnel Action: []
 Last Transaction Date: []

Current Position Summary				
ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

New Position Summary				
ID	Type of Review	Exemption Statute	Feed to CU Careers?	Job Summary
			<input type="checkbox"/>	

[Click to return to transaction steps.](#)

Position Change: Location Change

Action/Reason Selection			
*Action:	Position Change	*Reason:	Location Change
Old Effective Date:	12/01/2015	Old Effective Sequence:	0
*Effective Date:	<input type="text" value=""/>	Effective Sequence:	0
Comments:	<input type="text" value=""/>		
		Effective Sequence:	0
		Fiscal Year:	
		Previous	Next

Using the **Location Change** reason code, you will see the following **Work Information**, **Job Information**, **Campus Box** and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

CU Position Info:

- Campus Box

Note: 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.

[Click to return to transaction steps.](#)

Position Change: New Supervisor/Manager

Action/Reason Selection

*Action: Position Change *Reason: New Supervisor/Manager

Old Effective Date: 12/01/2015 Old Effective Sequence: 0

*Effective Date: BY Effective Sequence: 0 Fiscal Year:

Comments:

Using the **New Supervisor/Manager** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To (If recruiting in the near future, make sure there is an incumbent in the Reports To position.)
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)

Position Change: Other - Comment Required

Action/Reason Selection	
*Action:	Position Change
*Reason:	Other - Comment Required
Old Effective Date:	12/01/2015
Old Effective Sequence:	0
*Effective Date:	<input type="text"/> [B]
Effective Sequence:	0 Fiscal Year:
Profile Type:	Univ Staff Pos Profile Temp
Comments:	<input type="text"/>
<input type="button" value="Previous"/> <input type="button" value="Next"/>	

Using the **Other – Comment Required** reason code, you will see the following **Work Information**, **Job Information**, and **Employment Data** fields opened for update in Step 3: Job Information (shown on page 4) of the transaction:

Work Information:

- Position Title
- Location Code
- Reports To
- Appointing Authority

Job Information:

- Officer Code
- FLSA Status
- Pay Group

Employment Data:

- Company Seniority Date
- Probation Date
- Appointment End Date

Note: 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.

[Click to return to transaction steps.](#)