University of Colorado
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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

Hiring an Employee

When hiring employees, you may be using CU Careers to first recruit applicants and select a final candidate for hire. After selecting the candidate, you can have CU Careers send that candidate's information to HCM where you will complete the hire process. There may also be situations where you do not need CU Careers to send information to HCM because the system already has that person's information, such as a rehire or transfer.

In CU Careers, the hire process begins with the **collection of a candidate's** personal information, which is then sent to HCM by completing the disposition process. Candidates in CU Careers can be new to the university, former employees, and current employees. Because of these differences in candidate and employee status, you will have to disposition candidates differently.

In HCM, the process is completed by adding a transaction to finalize the hire. If you are hiring a student or rehiring an employee (not using CU Careers), proceed to *Beginning the Hire Transaction in HCM* on page 4, for more information.

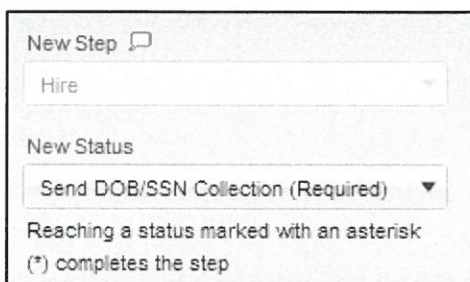**Note:** This guide also describes rehiring an employee, where applicable.

Choosing Your Method of Entry: Standard or Expert Entry

When creating Hire transactions in HCM, you can choose to use the standard method or Expert Entry. The standard method takes your through several pages to enter data, while Expert Entry lets you create ePAR Hire 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, such as summer hires. You can perform Expert Entry by clicking Expert Add under the ePAR Hire actions, or you can still choose the multiple forms 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.

Collecting the Candidate's Personal Data

After completing the offer process, the final step to complete the **recruiting process is to gather the candidate's** social security number (SSN) and date of birth (DOB). This information is confidentially stored within the candidate profile. This step is not required for candidates who are existing employees.

1. Contact your HR representative to post to the DOB/SSN page.

2. After HR has confirmed this posting change, move your candidate to the **Send DOB/SSN Collection (Required)** status and click **Save and Close**.

New Step

Hire

New Status

Send DOB/SSN Collection (Required)

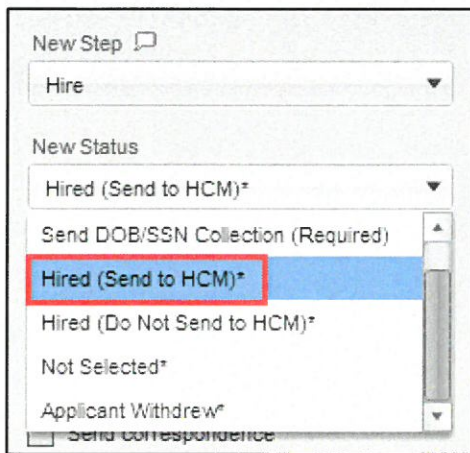Reaching a status marked with an asterisk (*) completes the step

The system automatically sends an email to the candidate requesting DOB and SSN information. After the candidate submits the requested information, the system automatically progresses the candidate to the next step, which is Hire; and status, which is DOB/SSN Completion (Required).

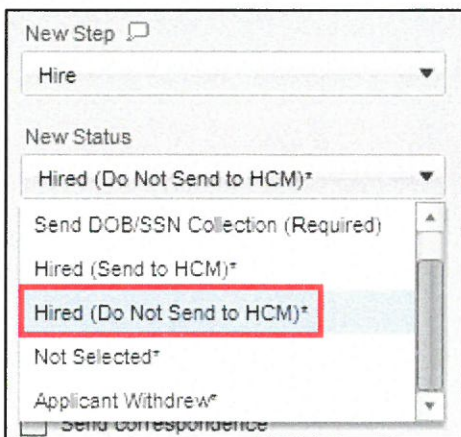| Step	Hire
Status	DOB/SSN Completion (Required)

Initiating the Hiring Process in CU Careers

After receiving **the candidate's SSN and DOB information, you** should disposition the candidate for hire so that you can complete a hire transaction in HCM.
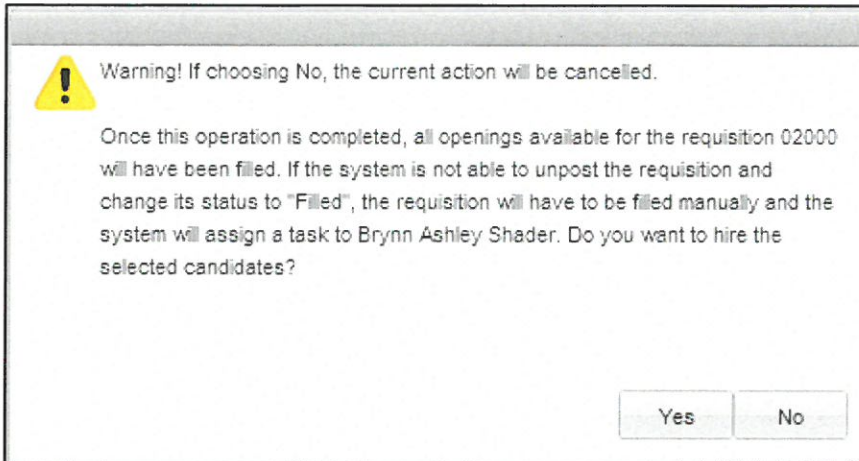
1. Disposition the selected candidate with the final status as described below:

   - If the candidate is a new employee, a rehire, or will have an additional job, the **candidate's personal** information and offer data needs to be sent to HCM where the hire can be completed.
   Update the candidate to the final status of **Hired (Send to HCM)**, and click **Save and Close**.

   New Step 💬
   Hire ▼

   New Status
   Hired (Send to HCM)* ▼
   Send DOB/SSN Collection (Required) ▲
   Hired (Send to HCM)*
   Hired (Do Not Send to HCM)*
   Not Selected*
   Applicant Withdrew* ▼

   - If the candidate is an existing active employee, but is transferring to a new position, then you do not need CU Careers to send data to HCM. Update the candidate to the final status of **Hired (Do Not Send to HCM)**, and click **Save and Close**.

   New Step 💬
   Hire ▼

   New Status
   Hired (Do Not Send to HCM)* ▼
   Send DOB/SSN Collection (Required) ▲
   Hired (Send to HCM)*
   Hired (Do Not Send to HCM)*
   Not Selected*
   Applicant Withdrew* ▼

2. From the Warning box that appears, click **Yes**.

> ⚠️ Warning! If choosing No, the current action will be cancelled.
>
> Once this operation is completed, all openings available for the requisition 02000 will have been filled. If the system is not able to unpost the requisition and change its status to "Filled", the requisition will have to be filled manually and the system will assign a task to Brynn Ashley Shader. Do you want to hire the selected candidates?
>
>   [Yes]   [No]

3. Click **OK** from the last notification that appears.

> The action has been successfully completed. However, at this point, you cannot progress any further in the workflow.
>
>   [OK]
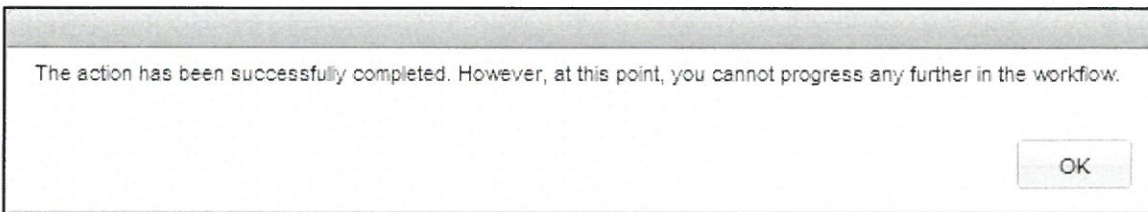
CU Careers will close the requisition, change the status of the requisition to Filled, and unpost it from all job boards. If you selected to send to HCM, **the candidate's information will appear in HCM.**

> Requisition
>
> **Wellness Program Mgr**
>
> 02000
>
> Status   [Filled]
> Status Details   N/A
>   Sourcing
>
> Candidates for this requisition: **3**

Note: If this candidate is an active employee who is being transferred, refer to *Transferring an Employee Step-by-Step Guide* for more information about initiating a transfer; Otherwise, continue with hiring (or rehiring) the employee in HCM as described in the following section.
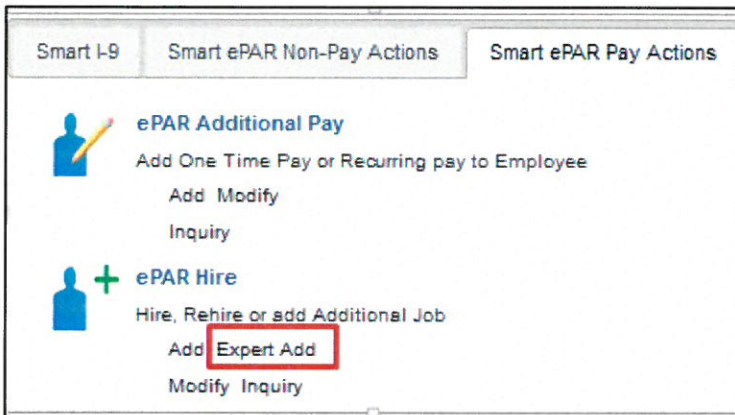
Beginning the Hire Transaction in HCM

To begin the hire (or rehire) transaction, you will first add the transaction and locate the employee or candidate for hire.

1. Navigate to: **Main Menu> Smart Solutions> Document Framework> Documents Collection**.

2. Click the **Smart ePAR Pay Actions** tab.
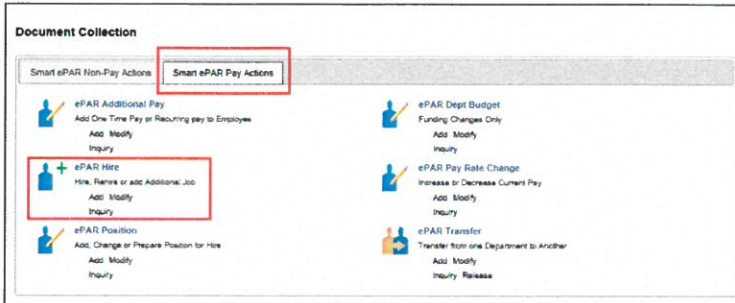
3. Under ePAR Hire, click **Add** or **Expert Add**.

Step 1: ePAR Hire Search

The Create ePAR Hire Request form displays a prompt asking whether the person you are looking for was recruited through CU Careers. The default of No is already selected.

You can search for either a candidate who was recruited through CU Careers, or a candidate who was not recruited through CU Careers:

- To search for a candidate who was recruited through CU Careers:

    1. Select **Yes** for the recruiting prompt:
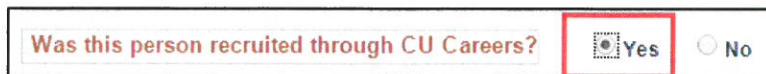
    HCM displays a list of candidates from CU Careers.

2. Select your candidate (who may also be an existing employee) from the list of new hires listed under **CU Careers Data**:

CU Careers Data	Personalize | Find | ▣ | 🖩 First ◀ 1-7 of 7 ▶ Last	
Select	**Applicant Name**	**Applicant ID**
☐	Justin Smith	61420
☐	Leela Cherokee	61481
☐	Dana Feinstein	61520
☐	Ali Bayir	51279
☐	Tyler Hansen	51961
☑	Julia Roberts	61680
☐	Brian Gregory	51531

- To search for an employee who was not recruited from CU Careers:

    1. Leave **No** selected for the recruiting prompt:

Was this person recruited through CU Careers?	○ Yes	● No

    2. Use the Search Criteria area to type the **National ID** or **Empl ID**, and then press **Tab**:

Search Criteria		
National ID:		
Empl ID:	🔍	Search Clear

3. Click **Search**.

The system runs a search to verify whether the candidate already exists in the HCM system.

- If the person is not in the system (new employee), you will get the following message:

Message
Search Criteria did not return any results (18160,43)
Enter new or additional Search Criteria
OK

- If the system finds employees that meet your search criteria, a list of existing employees appears. This result is expected for a rehire or an additional job. Remember, if this is a transfer,

you need to submit a different ePAR transaction. Refer to *Transferring an Employee Step-by-Step Guide*.

4. Depending on your search, click **OK** from the message box; or select the employee from the list.

    If the system has determined that this person does not exist in the HCM database, this will be a New Employee.

5. Click **Next**.

Step 2 of 8: Action/Reason

To indicate the type of action you are taking:

1. Complete the required fields.

    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 Action Reason, otherwise the system will generate an error.

2. From the **Action** list, the value is already selected for you (Hire or Rehire).

3. From the **Reason** list, select the appropriate reason.
    Available Reason values depend on the selected Action as well as the employee. That is, if you selected a candidate who already has a record in HCM, and if so, if that employee is active, there are specific reasons that can be associated with the hiring of that employee. The following table lists Actions and Reasons that can apply to the candidate you are hiring.

Note: Contents of the Expert Entry page for Hire/Rehire/Additional Job actions loads based on the Action/Reason combination selected.

Existing Employee	Active Employee	Action	Reason
No	No	Hire	New Hire Summer Research Summer Teaching
Yes	No	Rehire	Rehire Reappointment Reinstatement Summer Research Summer Teaching
Yes	Yes	Hire	Additional Job Additional Job Summer Research Additional Job Summer Teaching

According to these conditions, you can have the following situations:

- A candidate without an existing record would be a new hire.
- A candidate with an existing record who is not active is a former employee whom you can rehire.
- A candidate with an existing record who is active in the system, is a current employee whom you can hire for an additional job.

Note: If the candidate is an active employee whom you want to hire into a new job, then that is a transfer, and is a separate ePAR Pay Action. Refer to *Transferring an Employee Step-by-Step Guide* for more information about submitting an ePAR Transfer transaction.

4. In the **Effective Date** field, type or select a date from the calendar.
5. For the prompt, **Is this employee on a contract?** you must select either **Yes** or **No**.

   For this example, No is selected for the contract question. When you select No to the contract prompt, notice the total number of steps changes in the ePAR transaction page to a total of seven steps. If you select Yes, the step would remain step 3 of 8, because there is an additional step when you are entering a new employee who will be paid on a contract to define the contract parameters.

> **Contract Pay:** If you are paying this employee on contract, select **Yes** at the prompt. The Effective Date is the Contract Begin Date.
>
> Faculty at the university are primarily paid using contract pay. 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, 10, or 12 months. Graduate students may also be paid on a fall, spring, or academic year (AY) contract.

Collaborate   Attach

Create ePAR Hire Request

Step 2 of 8: ePAR - Action/Reason

Transaction Details

PAR Action:	Hire	**Action:**	Hire	**Document ID:**	ePAR Hire
Request ID:	NEXT	**Reason Code:**	New Hire	**Document Instance:**	0
ePAR Status:	Initial	**Effective Date:**	09/14/2015	**Document Status:**	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name	Test, Jane	**Empl ID:**		**Empl Rcd:**	0
Profile Type:		**Profile ID:**		**Last Personnel Action:**	
				Last Transaction Date:	

Action/Reason Selection

*Action:	Hire	***Reason:**	New Hire
*Effective Date:	09/14/2015	**Effective Sequence:** 0	**Fiscal Year:** 2016
Is this employee on a contract?: ○ Yes ⦿ No			
Comments:			

Previous   Next

6. If using standard entry, type text in the **Comments** box, type information about this new hire that may be helpful in the approval process.

7. Click **Next**.