

# Retroactive ATB Increase Process for Faculty and Librarians effective July 1, 2017

**NOTE:** This reference document is intended for the purpose of UTFA agreement made effective on July 1, 2017 salary increases; it does not apply to other employee groups or other salary increases implemented in different period.

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## Retroactive ATB Increase Process for Faculty and Librarians Overview

**Overview** These instructions are guiding the 1.00% ATB increase and Flat Dollar Adjustment of \$1,150, pro-rated for part-time in accordance with their FTE as of July 1, 2017 process for faculty members and librarians. The 1.00% increase applies to faculty members and librarians with a June 30, 2017 annual full-time salary of less than \$161,150. Every faculty member and librarian with a June 30, 2017 annual salary of more than \$161,150 will receive a flat dollar ATB base salary increase of  $1.00\% \times \$161,150 = \$1,612$ . The July 1, 2017 ATB increase process must be completed on HRIS by August 21<sup>st</sup>, 2017 pay close.


This document instructs on how to Change segment ON July 1, 2017 of the Appointment Detail (IT9009) and Create the Basic Pay (IT0008) screens in order to record the retroactive ATB increase information with an effective date of July 1, 2017. (Note: In some cases, depending what the future entries were pertaining to i.e. funding change or future dated transfer, you may be required to re-process those changes on the employee's record after the records have been processed.)

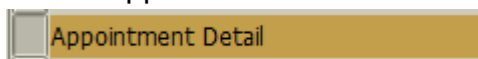



There will be **no automatic** update by Central for this process. Departmental Business Officers will be required to update all records under Basic Pay (IT008), Appointment Detail (9009) and Cost Distribution records (IT0027) with the respective ATB increase amount as of July 1<sup>st</sup>, 2017 prior to August 21<sup>st</sup>, 2017 pay close.

## Step 1: Update Appointment Details (IT9009) with July 1<sup>st</sup>, 2017 ATB Increase

Click on the following path: **Human Resources → Personnel Management → Administration → HR Master Data → Maintain**

1. Enter employee Personnel no. 
2. Select Appointment Detail in Financial Tab



3. Click on Overview .
4. Select the radio button for the employee's record that was done **ON** July 1, 2017 with future term or continuing end date.

**List Appointment Detail (9009)**

July Processing Copy

Personnel No. [REDACTED] Mr Louis Vuitton  
 Pers.area Appointed Subarea Academic  
 Employment Active EE subgrp TeachStr,Continuing

Overview

Start Date	End Date	Position	Pct.	PS group	Lv
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to
01.07.2017	31.12.9999	[REDACTED]	100.00	01A	02 Continui...
0110	[REDACTED]	[REDACTED]			136,693.0

5. Click on the **July Processing Copy** button.

**List Appointment Detail (9009)**

**July Processing Copy**

Personnel No. [REDACTED] Mr Louis Vuitton  
 Pers.area Appointed Subarea Academic  
 Employment Active EE subgrp TeachStr,Continuing

Overview

Start Date	End Date	Position	Pct.	PS group	Lv	LI
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to	
01.07.2017	31.12.9999	[REDACTED]	100.00	01A	02 Continui...	
0110	[REDACTED]	[REDACTED]			136,693.00	



The **July Processing Copy** button has been updated that will automatically calculate the 1.00% ATB increase and the Flat Dollar Adjustment of \$1,150, pro-rated for part-time faculty and librarians in accordance with their FTE.


In the event that the Flat Dollar Increase of \$620 was not processed last July 2017 pay, the **July Processing Copy** button will not automatically calculate the \$620 and must be entered manually.


**Copy Appointment Detail Screen Populates (Automatically)**

1. Verify the start date is July 1<sup>st</sup>, 2017.

- The 1% ATB increase and Flat Dollar adjustment is calculated and populated automatically.

JULY	Type	Change description	Chg amount	Chg pct.
PROCESSING	01	ATB	1,150.00	0.87
	01	ATB	1,319.00	1.00

- Update the PTR/Merit with the new total amount. (Please round up to the nearest dollar.)
- If applicable, update the Merit supplement with the new total amount. (Please round up to the nearest dollar.)
- Click  or press ENTER




The Appointment Detail screen can only accommodate up to a maximum of **5 Types of Salary Change**.

In the event that a faculty member or librarian has other pay changes effective July 1, 2017 (such as Change in FTE) in addition to the existing entries and will exceed the maximum allowed type of salary change, you need to combine the ATB components and annotate the record accordingly.

Further information on different scenarios is detailed on the [Eligibility & Important Info/Tips](#) section of this document.

- Click Save .



Note the **Pay Scale Level** and **Total Annual Salary**.



**END OF STEP NO. 1 – UPDATE APPOINTMENT DETAIL (IT 9009) SCREEN WITH JULY 1<sup>ST</sup>, 2017 ATB INCREASE**

## Step 2: Update Basic Pay Screen (IT0008) with July 1<sup>st</sup>, 2017 ATB Increase







If the employee is on Maternity DO NOT update Basic Pay 0008. This is a Central Payroll function, please fill out the Maternity Leave form and send it to Central Payroll Services.

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - **01.07.2017**
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

### **Create Basic Pay Screen Populates (Automatically)**

1. Verify the default data.
2. Enter the Level 
3. Enter the Annual Salary 
4. Click  or press ENTER.
5. Click  to SAVE.

**END OF STEP NO. 2 – UPDATE BASIC PAY SCREEN WITH JULY 1<sup>ST</sup>, 2017 ATB INCREASE**

## Eligibility & Important Info/Tips

1. Faculty members and librarians who commenced employment with the University prior to (but not including) July 1<sup>st</sup>, 2017 will be eligible for **1% ATB** increase and Flat Dollar Adjustment.
2. The following are **not** eligible for the **1% ATB** increase and Flat Dollar Adjustment and **July Processing Copy** button will not work.
  - a. Faculty members and librarians on Special Retirement Program (not currently available)
  - b. Principals and Deans
  - c. Non-Tenure Stream Clinicians
  - d. Faculty members and librarians on unpaid leave on July 1, 2017
3. The **July Processing Copy** button will not work for Cross-appointed Academics when their main appointment is non-Academic. The calculation must be entered manually.
4. If there is an existing segment **AFTER** July 1st, 2017 in the Appointment Detail screen, the segment must be deleted first in order to process the flat dollar amount. Then, re-create the deleted segment.
5. If there are multiple segments due to multiple funding or cross-appointment (Academic to Academic), the **July Processing Copy** button must be selected for each segment in order to automatically calculate the flat dollar amount based on the FTE or CC/CFC percentage allocation.
6. Rounding issues due to multiple segments in Appointment Details (IT 9009) screen should be adjusted accordingly by the Business Officers.
7. In the event that a faculty member or librarian has a position change or change in FTE% effective July 1, 2017, the **1% ATB** increase and the Flat Dollar Adjustment amounts will have to be manually calculated.
8. In the event that a faculty member or librarian has an additional other pay changes effective July 1, 2017 (such as Percent of Time, Anomaly Adjustment, or Promotional Increase) and will exceed the maximum allowed type of salary change, add the **1% ATB** increase and the Flat Dollar Adjustment amounts and enter as 1 line item – 01 ATB.
9. If the faculty member or librarian has 2 additional other pay changes effective July 1, 2017 (such as Percent of Time, Anomaly Adjustment, or Promotional Increase) and will exceed the maximum allowed type of salary change,

- a. Add the **1% ATB** increase and the Flat Dollar Adjustment amounts and enter as 1 line item – 01 ATB.
- b. Add the PTR/Merit and the Merit Supplement amounts and enter as 1 line item – 03 PTR/Merit.



10. To summarize, the Appointment Detail screen will have the following entries:

Type	Change description	Chg amount	Chg pct.
01	ATB	██████████	██████████
01	ATB	██████████	1.00
03	PTR/Merit	██████████	2.51
14	Other	██████████	██████████
18	Merit Supplement	██████████	0.64
Annual salary to		██████████	

## HR Data Verification Report

*Run the Data Verification Report. The data verification report should be run each time an employee's record is updated. This report identifies inaccurate, incomplete or missing employee data. It provides HRIS users with a tool to verify the entire employee record by checking data on each infotype and by cross-checking data consistency between infotypes.*

### **Personnel Actions Screen. HR Data Verification Report**

1. Click on the HR Data Verification Report Button at the top of the screen  
HR Data Verification Report .
2. To Print the report click on the PRINT icon 
3. All errors and warnings should be corrected upon completion of the update event.
4. Click on the back arrow  to return to the Personnel Actions screen.