

ATB Increase Process for Confidential, PM, AP and RA/SRA Staff with Segment Dates After January 1, 2015

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ATB Increase Process Overview with Segments AFTER January 1, 2015

Overview This communication is an overview of the scenario outside of the normal January ATB increase process and the process steps for recording on HRIS. The January 2015 ATB increase process must be completed on HRIS by the **January 21, 2015** pay close. This scenario involves Confidential, PM, AP and RA/SRA Staff employees that have a segment record **after** January 1, 2015 with future term or continuing end dates already on the system.

This document instructs staff on how to change the Appointment Detail (IT9009) and create the Basic Pay (IT0008) screens in order to record the ATB increase information for the above Staff with an effective date of January 1, 2015. (In some cases, depending what the future entries were pertaining i.e. funding change or future dated transfer, you may be required to re-process those changes on the employee's record after the January records have been processed.)

Eligibility Note: Only currently active employees as of Jan 1, 2015, which were continuously employed as on June 30, 2014, in the PM, Conf, and Research groups are eligible.



Any employees with data integrity issues who were not automatically updated on January 9th, 2015 will need to be manually updated. Departmental Business Officers will be required to update all eligible Basic Pay (IT008), Appointment Detail (9009) and Cost Distribution records (IT0027) with the respective ATB amounts as of January 1, 2015 prior to the January pay close (January 21, 2015).

Step 1 – Deleting any Appointment Detail entries done AFTER January 1, 2015



Please ensure prior to deleting or overwriting these records you take a copy of the information you are deleting. There is no way to view the deleted information in HRIS. Contact [HRIS Support Team](#) if you need assistance.


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 that has the cost centre/fund centre/fund, position and/or percentage of time change on the employee's record that was done **AFTER** January 1, 2015 with future term or continuing end date.

Start Date	End Date	Position	Pct.	PS group	Lv	LI
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to	
<input type="radio"/> 09.01.2015	31.12.9999		100.00	PM3	Continuing	75,513.00
0110						

5. Click on the delete button

6. Click on the delete button  again in the Appointment Detail Screen

Step 2 - Update ATB Increase in the Appointment Details (IT9009)

From the Maintain Data Screen:



1. Select the latest Appointment Detail record for the addition of the ATB increase by

Overview	
Start Date	End Date
Wage type	Funds ctr
<input type="radio"/> 29.09.2014	31.12.9999
0110	100670

clicking on the radio button

2. Click on the COPY function 

Appointment Detail Screen Populates (Automatically)

1. Change the Start Date to 01.01.2015
2. Verify the end date is 31.12.9999
3. Enter the amount of the ATB effective January 1, 2015 in the Chg Amount. Please round up to the nearest dollar.
4. Click  or press ENTER
5. Click Save 

END OF STEP No. 1 & 2 – DELETION OF CHANGE MADE AFTER JANUARY 1, 2015 AND APPOINTMENT DETAIL SCREEN UPDATE

Step 3 - Update Basic Pay Screen (IT0008) with ATB Increase Process Steps

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - 01.01.2015

2. Select Basic Pay in the Financial Tab

Basic Pay	
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3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

4. Verify the default data

5. Enter the annual salary

Ann.salary		CAD
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6. Click  or press ENTER

7. Click  to SAVE

END OF STEP No. 3 - ANNUAL SALARY UPDATE

Steps 4 & 5 – Recreate Deleted Screens

Step 4: Update and recreate using the Copy function all Appointment Detail (IT9009) information that was deleted in Step 1. Please refer to the HRIS Procedure Documentation for assistance.

Step 5 (If Applicable): If there is a change in salary with a future end date the ATB increase will be included when you recreate the Basic Pay (IT0008) screen information again using the Create function. Please refer to the HRIS Procedure Documentation for assistance.






INFO TIPS
If the change deleted in Step 1 does not affect salary for example: fund centre/cost centre/fund change or position change these do not affect the employee's salary so there is no need to update the basic pay screen (0008) in Step 5. If you have any questions please contact [HRIS Support Team](#).

END OF STEPS No. 4 & 5 – RECREATE DELETED SCREENS

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 
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  return to the Personnel Actions screen.