

# ATB Process for USW Staff with Increase and Progression on the Grid On July 1, 2015

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## ATB Process Overview for Staff with Grid Progression ON July 1, 2015

**Overview** This communication is an overview of the process outside of the normal July ATB increase process whereby a USW staff member has their Salary Adjustment Date on July 1.

The Business Officer **MUST** record both the July 1, 2015 ATB and the placement on the grid for a USW staff member in this scenario.

This document instructs on how to **update** the Appointment Detail (IT9009) and **create** the Basic Pay (IT0008) screens in order to record the ATB increase information for Staff in the above scenario with an effective date of July 1, 2015.



Any employees with data integrity issues who were not automatically updated on July 10<sup>th</sup>, 2015 will need to be manually updated. Departmental Business Officers will be required to update all eligible Basic Pay (IT0008), Appointment Detail (9009) and Cost Distribution records (IT0027) with the respective ATB amounts as of July 1, 2015 prior to the July pay close.

## Step 1 – Run the USW Grid Placement/Progression Report

Click on the following path: **Human Resources → Information System → Personnel Management → Administration → Dept. Level Admin → USW → USW Grid Placement/Progression Report**

1. Enter the Organizational Unit or Units you wish to run the report
2. Enter the month for which you want to run the report in the Report for the month of field (i.e. July enter 7)
3. Enter the Year in the Report for the year of filed (2015)


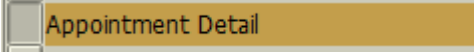

Selection	
Personnel Number	<input type="text"/>
Employment status	<input type="text" value="0"/>
Organizational unit	<input type="text"/>

Selection Criteria	
Report for the Month of ?	<input type="text" value="7"/>
Report for the Year of ?	<input type="text" value="2015"/>


## Step 2 – Updating any Appointment Detail entries done ON July 1, 2015

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 record that was done **ON** July 1, 2014 with future term or continuing end date.

## USW ATB and Grid Progression/Placement

Start Date	End Date	Position	Pct.	PS group	Lv	LI
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to	
01.07.2014	31.12.9999	22240	Administrative Offic...	0.00 07	01 Continuing	
0100	100822	11044			48,550.00	

5. Click on the COPY button 

### ***COPY Appointment Detail Screen (9009)***



1. Enter the effective date of the step increase (if the Contract is other than Continuing, the valid end date of the funding source period must be entered)
2. Enter the USW step in the Level (Lvl) field
3. Select the TYPE -00 – **ATB USW**
4. Enter the ATB Amount in the Chg Amount Field
5. Select the salary type – **24 Progression on the Grid**
6. Enter the Annual Increase Amount in the Chg Amount Field
7. Click  or press ENTER
8. Click  to Save

**Note: If the employee has multiple Appointment Detail Screens each must be updated with the Step Progression.**

### **END OF STEP No. 2 APPOINTMENT DETAIL SCREEN UPDATE**



## **Step 3 - Update Basic Pay Screen (IT0008) with ATB Increase and Grid Progression Level Process Steps**

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - 01.07.2015
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

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

1. Select the required REASON code 24 – Progression on the USW Grid or 00 – ATB USW
2. Verify the default data proposed
3. Enter the USW Step in the Level field

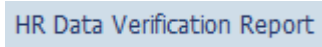


4. Click  or press ENTER (The Annual Salary will default based on the Level)
5. Click  to SAVE

**END OF STEP No. 3 - ANNUAL SALARY UPDATE**

## 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.