

Merit Increase Process for Academics with Segment Dates After July 1, 2015

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Merit Increase Process Overview with Segments AFTER July 1, 2015

Overview This communication is an overview of the scenario outside of the normal July PTR/Merit increase process and the process steps for recording on HRIS. The July 2015 merit increase process must be completed on HRIS by the September 21st 2015 (September monthly pay close). This scenario involves employees that have segments in HRIS **after** July 1, 2015 already on the system.

This document instructs staff on how to **delete** the Appointment Detail (IT9009) and **create** the Basic Pay (IT0008) screens in order to record the merit increase information for Academics with an effective date of July 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 July records have been processed.)



There will be **no automatic** update process by HRIS for this process. Departmental Business Officers will be required to update all eligible Basic Pay (IT008), Appointment Detail (9009) and Cost Distribution records (IT0027) with the respective merit amounts as of July 1, 2015 prior to the September pay close (September 21, 2015).

For employees with exceptions such as being on Maternity Leave and LTD are centrally processed. Please contact Payroll at payroll.hr@utoronto.ca for assistance.

Step 1 – Delete any Appointment Detail entries done AFTER July 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** July 1, 2015 with future term or continuing end date.

Start Date	End Date
Wage type	Funds ctr
<input type="radio"/> 01.09.2015	31.12.9999
0100	102237

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

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

From the Maintain Data Screen:

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

Overview			
	Start Date	End Date	
	Wage type	Funds ctr	
<input type="radio"/>	01.07.2014	31.12.2014	
	0120	100822	



clicking on the radio button

2. Click on the COPY function 

Appointment Detail Screen Populates (Automatically)

1. Change the Start Date to 01.07.2015
2. Verify the end date is 31.12.9999
3. Enter the amount of the PTR/Merit effective July 1, 2015. Please round up to the

nearest dollar. PTR/Merit

4. Click  or press ENTER
5. Click Save 

END OF STEP No. 1 & 2 – DELETION OF CHANGE MADE AFTER JULY 1, 2014 AND APPOINTMENT DETAIL SCREEN UPDATE

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

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - 01.07.2015

Period	
<input checked="" type="radio"/>	Period
<input type="radio"/>	From

2. Select Basic Pay in the Financial Tab

Basic Pay	<input checked="" type="checkbox"/>
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3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Enter the Level (Academic Rank)

3. Enter the **new** annual salary

Ann.salary	<input type="text"/>	CAD
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4. Click  or press ENTER
5. 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 or email the HRIS Help Desk.

Step 5 (If Applicable): If there is a change in salary with a future end date the retro merit 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 or email the HRIS Help Desk.





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.

HR Data Verification Report