

# Retro Merit Increase Process for Research Associate with Segment Dates After July 1, 2015

## Contents

Merit Increase Process Overview with Segments AFTER July 1, 2015

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

Step 2 – If Applicable Delete Basic Pay Process Steps

Step 3 - Update Merit Increase in the Appointment Details (IT9009)

Step 4 - Update Basic Pay Screen (IT0008) with Merit Increase Process Steps

Steps 5 & 6 – Recreate Deleted Screens

HR Data Verification Report

## 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 **October 22<sup>nd</sup>, 2015** (October monthly pay close). This scenario involves employees that have segments in HRIS after July 1, 2015 already recorded 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 with an effective date of July 1, 2015. (In some cases, depending on 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 October pay close (October 22<sup>nd</sup>, 2015).

## Step 1 – Deleting 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:

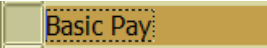



Human Resources → Personnel Management → Administration → HR Master Data → Maintain

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.

<input checked="" type="radio"/>	01.09.2015	31.12.2020	37317	HRInformation Sy...	100.00	PM3	Term
	0110	100670		941257			77,350.00

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

## Step 2 – If Applicable Delete Basic Pay Process Steps

1. Select Basic Pay in Financial Tab 
2. Click on Overview 
3. Select the radio button that has record update that was done **AFTER** July 1, 2015 with continuing end date.
4. Click on the delete button 
5. Click on the delete button  again in the Basic Pay Screen

## Step 3 - 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 clicking on the radio button

<input checked="" type="radio"/>	01.07.2015	31.08.2015	37317	HRInformation Sy...	100.00	PM3	Term
	0110	100670		941257			72,350.00

2. Click on the CHANGE function 

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

1. If the Appointment is Continuing the end date must be 31.12.9999, if it is a Term enter the end date of the contract.
1. Enter the amount of the PTR/Merit effective July 1, 2015. Please round up to the nearest dollar. 
2. Click  or press ENTER
3. Click Save 

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

## Step 4 - 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



The screenshot shows a 'Period' tab with a radio button selected for 'Period'. Below it, the 'From' field is highlighted with a red oval, and the 'To' field is visible to its right.




2. Select Basic Pay in the Financial Tab



The screenshot shows a dropdown menu with 'Basic Pay' selected and a checkmark icon to its right.

3. Click on Create 

### Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Enter the annual salary 
3. Click  or press ENTER
4. Click  to SAVE

### END OF STEP No. 4 - ANNUAL SALARY UPDATE

## Steps 5 & 6 – Recreate Deleted Screens

**Step 5:** 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 6 (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.



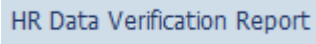


If the change deleted in Step 1 does not affect salary for example: fund centre/cost centre/fund change or position change these do not affect the employee's salary so there is no need to update the basic pay screen (0008) in Step 5. If you have any questions please contact [HRIS Support Team](#).

**END OF STEPS No. 5 & 6 – 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.