

# ATB Process for USW Staff with Increase and Progression on the Grid On January 1, 2016

## Contents

ATB Process Overview for Staff with Grid Progression ON January 1, 2016  
Step 1 – Run the USW Grid Placement/Progression Report  
Step 2 – Updating any Appointment Detail entries done ON January 1, 2016  
Step 3 - Update Basic Pay Screen (IT0008) with ATB Increase and Grid Progression  
Level Process Steps  
HR Data Verification Report

## ATB Process Overview for Staff with Grid Progression ON January 1, 2016

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

The Business Officer **MUST** record both the January 1, 2016 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 January 1, 2016.



INFO TIPS

Any employees with data integrity issues who were not automatically updated on January 9, 2016 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 January 1, 2016 prior to the January pay close.

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

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


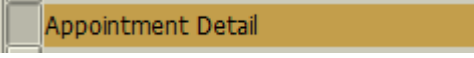

1. Enter the Organizational Unit or Units you wish to run the report
2. Enter the month for which you want to run the report in the Report for the month of field (i.e. January enter 1)
3. Enter the Year in the Report for the year of filed (2016)

The screenshot shows the 'USWA Grid Placement/Progression Report' form. It has a title bar with the report name and three icons (refresh, print, help). Below the title bar are two buttons: 'Further selections' and 'Search helps'. The form is divided into three main sections: 'Period', 'Selection', and 'Selection Criteria'. The 'Period' section has radio buttons for 'Today' (selected), 'Up to today', 'Other period', 'Current month', 'From today', and 'Current year'. Below these are two input fields labeled 'Period' and 'To'. The 'Selection' section has three rows: 'Personnel Number' with an empty input field, 'Employment status' with a dropdown menu showing '0', and 'Organizational unit' with an empty input field. To the right of these rows are three arrow buttons. The 'Selection Criteria' section has two rows: 'Report for the Month of ?' with an input field containing '01', and 'Report for the Year of ?' with an input field containing '2016'.

USWA Grid Placement/Progression Report		
Further selections    Search helps		
<b>Period</b>		
<input checked="" type="radio"/> Today	<input type="radio"/> Current month	<input type="radio"/> Current year
<input type="radio"/> Up to today	<input type="radio"/> From today	
<input type="radio"/> Other period		
Period		To
<b>Selection</b>		
Personnel Number		→
Employment status	≠ 0	→
Organizational unit		→
<b>Selection Criteria</b>		
Report for the Month of ?	01	
Report for the Year of ?	2016	

## Step 2 – Updating any Appointment Detail entries done ON January 1, 2016



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, 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 checked="" type="radio"/> 01.07.2015	09.01.2016		100.00	10	05 Continui...	
0100					67,028.00	

5. Click on the COPY button 

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

1. Enter the effective date of the step increase, i.e **01.01.2016** (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 – **01.01.2016**

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

[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  return to the Personnel Actions screen.