



Retroactive ATB Increase Process for UTFA Staff with Segment Dates After for July 1, 2014 & January 1, 2015

Contents

Retroactive ATB Increase Process Overview with Segments After July 1, 2014 and July 1, 2015

Step 1: Deleting any Appointment Detail entries done AFTER July 1, 2014

Step 2: Deleting any Appointment Detail entries done AFTER January 1, 2015

Step 3: Update ATB Increase in the Appointment Details (IT9009) for July 1, 2014

Step 4: Recreate Deleted Appointment Detail Screens for 2014

Step 5: Update ATB Increase in the Appointment Details (IT9009) for January 1, 2015

Step 6: Recreate Deleted Appointment Detail Screens for 2015

Step 7: Update Basic Pay Screen (IT0008) with July 2014 ATB Increase Process Steps

Step 8: Update Basic Pay Screen (IT0008) with Segment Dates After July 1, 2014

Process Steps

Step 9: Update Basic Pay Screen (IT0008) with January 2015 ATB Increase Process Steps

Step 10: Update Basic Pay Screen (IT0008) with Segment Dates After January 1, 2014 Process Steps

Step 11: HR Data Verification Report

Retroactive ATB Increase Process Overview with Segments After July 1, 2014 and July 1, 2015

Overview

This communication is an overview of 1% increase as of July 1, 2014 and 0.9% increase as of January 1, 2015 process and the steps for recording both increases on HRIS where an employee has segments after July 1, 2014 and January 1, 2015. The July 1, 2014 and January 1, 2015 retroactive ATB increase process must be completed on HRIS by the **February 18, 2016** pay close. These instructions are on the process outside of the normal scenario which involves UTFA Staff that have no segments on record after July 1, 2014 or January 1, 2015 with future term or continuing end dates already on the system.

This document instructs on how to **Delete** any segments after July 1, 2014 and January 1, 2015 and how to **Copy/Change** the Appointment Detail (IT9009) and **Create the Basic Pay** (IT0008) screens in order to record the retroactive ATB increase information with an effective date of July 1, 2014 and January 1, 2015. (**Note:** In some cases, depending what the future entries were pertaining to 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.)



Departmental Business Officers will be required to update all eligible Basic Pay (IT008), Appointment Detail (9009) and Cost Distribution (IT0027) records (if applicable) with the respective retroactive ATB amounts as of July 1, 2014 and January 1, 2015 prior to the **February 18, 2016** pay close.

Eligibility criteria for continuing and new Faculty Members

Faculty members and Librarians who will be entitled for July 1 2014 retroactive ATB increase must be actively employed on June 30th, 2014 and July 1st, 2014. Faculty members who will be entitled for January 1, 2015 retroactive ATB increase must be actively employed on December 31st, 2014 and January 1st 2015

Faculty members and librarians who commenced employment with the University on or after July 1, 2014 but before January 1, 2015 will be entitled to the January 1, 2015 ATB increase on their December 31st salary. Faculty members and librarians who commenced employment with the University on or after January 1, 2015 will not be entitled to either increase.

Step 1: Deleting any Appointment Detail entries done AFTER July 1, 2014




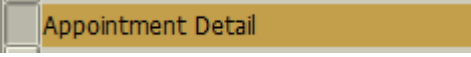

As noted above, the deletions are for Appointment Changes **ONLY**.

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, 2014 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"/> 01.10.2014	31.12.2014	19004	50.00			
	100822	11044			25,000.00	

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

Note: Some employees have multiple Appointment Detail screens. The steps above **MUST** be done for all Appointment Detail screens with the date after July 1, 2014.

Step 2: Deleting any Appointment Detail entries done AFTER January 1, 2015



INFO TIPS

As noted above, the deletions are for Appointment Changes and PTR Increase.



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. Select Appointment Detail in Financial Tab 

2. Click on Overview 

3. 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.

	01.04.2015	30.06.2015	20859	Professoriate Tn-...	100.00	03A	04 Continui...
	0110	100925		11057			

4. Click on the delete button 


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

Note: Some employees have multiple Appointment Detail screens. The steps above MUST be done for all Appointment Detail screens with the date after January 1, 2015.

Step 3: Update Retroactive ATB Increase in the Appointment Details (IT9009) for July 1, 2014


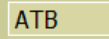


From the Maintain Data Screen:

1. Select the latest Appointment Detail record for the addition of the ATB increase by clicking on the radio button

	Start Date	End Date	Position	Pct.	PS group	Lv	LI
	Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to	
	01.07.2014	31.07.2014		Professoriate Tn-...	51.00	03A	04 Continui...
	0110	101126	13095				

2. Click on the CHANGE function 

Change Appointment Detail Screen

- On the second line of the TYPE column, Select  
- Enter the amount of the ATB effective July 1, 2014 in the Chg Amount. (Please round up to the nearest dollar)
- Click  or press ENTER
- Click Save .



If the employee is on Maternity DO NOT update Basic Pay 0008. This is a Central Payroll function, please fill out the Maternity Leave form and send it to Central Payroll.

Step 4: Recreate Deleted Appointment Detail Screens for 2014


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: Update ATB Increase in the Appointment Details (IT9009) for January 1, 2015

From the Maintain Data Screen:

1. Select the latest Appointment Detail record for the addition of the ATB increase by clicking on the radio button



Overview							
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"/>	01.08.2014	31.12.9999	█	Professoriate Tr...	51.00	03A	04 Continui...
0110	101126	13095					

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. Select the TYPE – 01
4. Enter the amount of the ATB effective January 1, 2015 in the Chg Amount.

(Please round up to the nearest dollar)



5. Click  or press ENTER
6. Click Save 

Step 6: Recreate Deleted Appointment Details Screens for 2015




Step 6: Update and recreate using the Copy function all Appointment Detail (IT9009) information that was deleted in Step 2. Please refer to the HRIS Procedure Documentation for assistance.

Step 7: Update Basic Pay Screen (IT0008) with July 2014 ATB Increase Process Steps

From the Maintain Master Data Screen:



1. Enter the effective date of the salary change in the FROM field - **01.07.2014**
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Enter the Level
3. Enter the Annual Salary 
4. Click  or press ENTER.
5. Click  to SAVE.

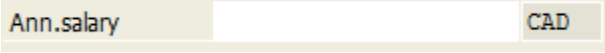


Step 8: Update Basic Pay Screen (IT0008) with Segment Dates After July 1, 2014 Process Steps

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field – (Date After July 1, 2014)
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Enter the Level

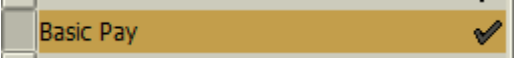

3. Enter the Annual Salary 
4. Click  or press ENTER.
5. Click  to SAVE






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 8. If you have any questions please contact [HRIS Support Team](#).

Step 9: Update Basic Pay Screen (IT0008) with January 2015 Retroactive 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 
3. Click on Create 

Create Basic Pay Screen Populates (Automatically)



6. Verify the default data
7. Enter the Level
8. Enter the Annual Salary 
 1. Click  or press ENTER.
 2. Click  to SAVE.

Step 10: Update Basic Pay Screen (IT0008) with Segment Dates After January 1, 2015 Process Steps

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field – (Date After January 1, 2015)
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Enter the Level
3. Enter the Annual Salary
4. Click  or press ENTER.
5. Click  to SAVE

Ann.salary	<input type="text"/>	CAD
------------	----------------------	-----






If the change deleted in Step 2 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 10. If you have any questions please contact [HRIS Support Team](#).

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.