

ATB Increase Process for USW Staff with Segment Dates After July 1, 2016

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ATB Increase Process Overview with Segments After July 1, 2016

Overview

This communication is an overview of the scenario outside of the normal July 2016 ATB increase process and the process steps for recording on HRIS. The July 2016 ATB increase process must be completed on HRIS by the **July 21st, 2016** pay close. This scenario involves USW Staff employees that have a segment record **after July 1, 2016** with future term or continuing end dates already on the system.

This document instructs on how to **Delete** any segments after July 1, 2016 and how to **Copy** the Appointment Detail (IT9009) and **Create the Basic Pay** (IT0008) screens in order to record the ATB increase information with an effective date of July 1, 2016. (**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.)



Any employees with data integrity issues who were not automatically updated on **July 10th, 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 (IT0027) records (if applicable) with the respective ATB amounts as of July 1, 2016 prior to the **July 21st, 2016** pay

close.

Step 1: Deleting any Appointment Detail entries done AFTER July 1, 2016



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, 2016 with future term or continuing end date.

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"/>	01.08.2016	31.08.2016		Tissue Engineerin...	100.00	09	05 Continui...
	0100	201921	11190	497969	63,439.00		

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, 2016.

Step 2: Update ATB Increase in the Appointment Details (IT9009) for July 1, 2016

From the Maintain Data Screen:

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


Overview							
Start Date	End Date	Position	Pct.	PS group	Lv	LI	
Wage type	Funds ctr	Cost ctr	Order	Fund	Ann.salary to		
01.02.2016	31.07.2016	██████████	Tissue Engineerin...	100.00	09	05	Continui...
0100	201921	11190		499516			38,063.00

2. Click on the COPY function 

Appointment Detail Screen Populates (Automatically)

1. Change the Start Date to **01.07.2016**
2. Verify the end date is **31.12.9999** or **the term end date**.
3. Select the TYPE – 01
4. Enter the amount of the ATB effective July 1, 2016 in the Chg Amount.

(Please round up to the nearest dollar)

5. Click or press ENTER
6. Click Save 



Note the **Pay Scale Level**.

Step 3: Recreate Deleted Appointment Detail Screens

after July 1, 2016

Step 3: 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.





Note the **Pay Scale Level**.

Step 4: Update Basic Pay Screen (IT0008) with July 2016 ATB Increase Process Steps


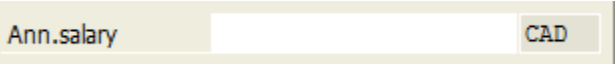




If the employee is on Maternity DO NOT update Basic Pay 0008. This is a Central Payroll function, please fill out the Maternity Leave form and send it to Central Payroll.

From the Maintain Master Data Screen:

1. Enter the effective date of the salary change in the FROM field - **01.07.2016**
2. Select Basic Pay in the Financial Tab 
3. Click on Create 

Create Basic Pay Screen Populates (Automatically)

1. Verify the default data
2. Select the Reason 00 – ATB USW.
3. Enter the Level 
4. Verify the Annual Salary 
5. Click  or press ENTER.
6. Click  to SAVE.

Step 5: Update Basic Pay Screen (IT0008) with Segment Dates After July 1, 2016 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, 2016**)

2. Select Basic Pay in the Financial Tab



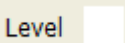
3. Click on Create



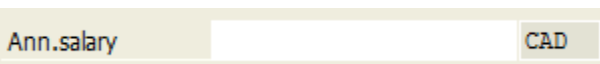
Create Basic Pay Screen Populates (Automatically)


1. Verify the default data

2. Enter the Level



3. Verify 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 5. 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

[HR Data Verification Report](#)

July 2016 ATB Increase Process Scenarios

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.