CH3 - Changes to hours

What's changed?
1. Note removed about contacting the Reward team to change hours on post (no longer required).
2. Screenshots replaced following the implementation of Self-Service.

September 18

Where a change in hours is required (not including moving to/from a term time only contract) the employee's appointment and salary must be amended. If relevant, allowances may also need to be amended.

Changes to the salary (and allowances if applicable) will need to be approved within Core Personnel. Approvers should refer to ***QRG: FD5 Approve (or Reject) Salary/ Allowances*** for guidance on approving.

If the employee has a work visa the terms must be checked before any changes are made to their appointment.

The guide covers the process steps shown below:

1. Amend appointment 1
2. Amend pay 3
3. Amend allowances (if relevant) 4
   a. Viewing current allowances 4
   b. Setting up a new allowance 5

Navigate to: Personnel > Maintenance > Personal Profile

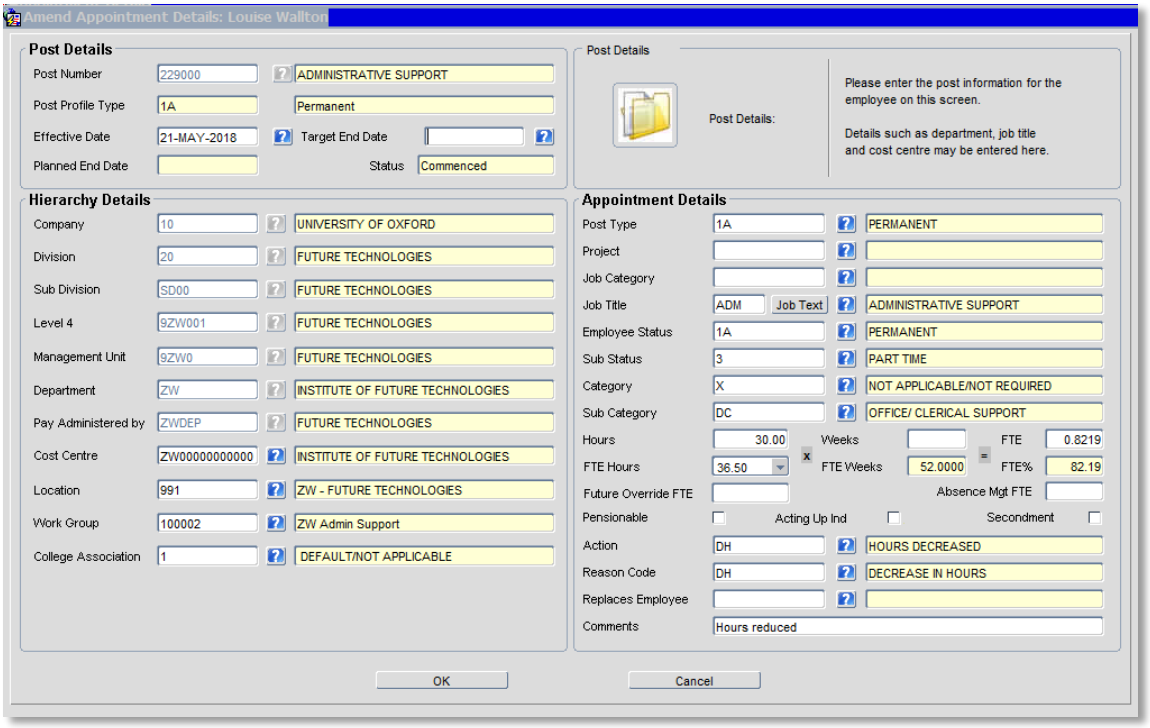
Search for and open the relevant employee record and go to **Select Detail** box > **Appointment Details.** The *Appointment Details window* opens.

1. Amend appointment

1. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.

Note: For Fixed Term appointments, click View Appointment and make a note of the current **Target End Date**.

2. Click the Amend Appointment button. The Amend Appointment Details window opens:



3. Enter the appointment change details:

Field Name (* mandatory)	**Description**
Effective Date *	Enter the date that the change will take place.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it still correct.
Sub status	Amend as appropriate, e.g. part-time
Hours *	Update the hours that will be worked per week e.g. 18.75.
FTE Hours *	Ensure FTE Hours are set to represent normal full time hours for a full time equivalent based on the grade.
Weeks (term-time employees only)	Enter the number of weeks the employee works per year inclusive of holiday entitlement. E.g. if the employee works 38 weeks per year and is entitled to 4 weeks holiday, enter 42 weeks. **NB:** only applicable to term time employees who are paid the same amount each month.
FTE Weeks	This field will be set by the system to 52.
FTE *	FTE will be calculated based on FTE Hours e.g. 1 for full time or 0.5 for part time equating to half normal hours.
Action *	Enter the relevant action e.g. **Hours Decreased/Hours Increased**.
Reason Code *	Enter the relevant reason code e.g. **Family Friendly Working hours**, **Decrease in Hours**, **Increase in Hours** etc.

Comments *	Enter any relevant comments.

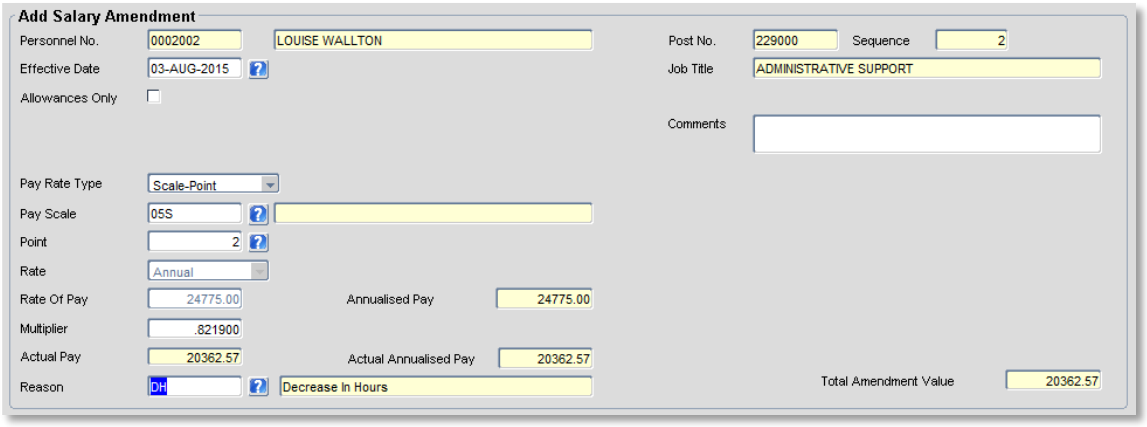
4. Click OK. The *Amend Appointment Details* window closes.

5. A message confirms that changes have been made. Click OK.

2. Amend pay

1. From the Appointment Details click the Appointment Details button. The *Post Appointment Maintenance* screen opens.

2. Go to **Selection** > **Amend Pay Rate**.



Note: Changes made to the appointment will have been fed through to this screen, but it is important to check the details are correct and enter the **Effective Date** and **Reason** (see below) in order for the pay change to be activated.

Note: If the change is to be back dated it is important to check the dates of any other changes that have been entered already, to ensure there are no conflicts. Check these on the *View Position History* screen. If you are unsure contact HRIS support for guidance.

3. Update the employee's pay record:

Field Name (* mandatory)	Description
Effective Date *	Start of pay change *(should be the same as the effective date of the appointment change)*
Pay Scale *	Will be populated from current pay details
Point *	Will be populated from current pay details.
Multiplier *	Will be populated from current FTE. Amend if appropriate. **Note:** A calculator is available on the HRIS website if you would like help to work this out.
Reason *	Select reason e.g. **Hours Decreased/Hours Increased**. *(should be the same as the reason entered on the appointment change)*
Comments *	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

4. Click OK. The system will ask if you are sure you want to add this salary amendment. Click Yes.

5. The Maintain HR Salary Amendments window opens.

6. If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away.

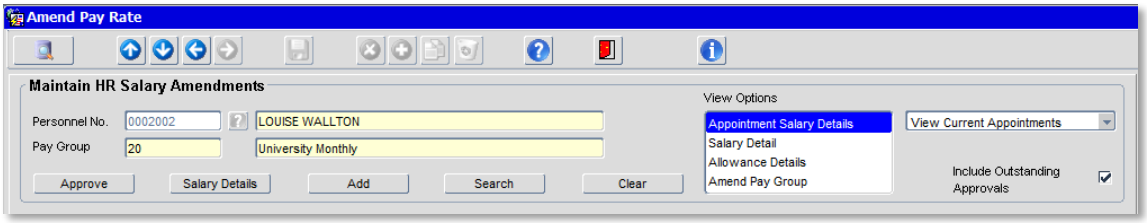
3. Amend allowances (if relevant)

If the employee is currently receiving a ***value*** allowance, e.g. Acting up/Misc Non Pens Payment, you will need to amend the allowance to reflect the new FTE.

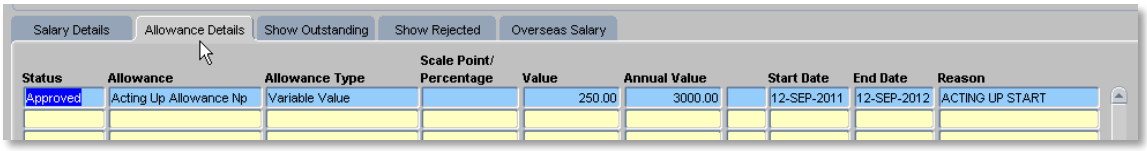
a. Viewing current allowances

1. To view the employee's allowances, from the *Appointment Details* window click the Appointment Details button. The *Post Appointment Maintenance* window opens.

2. Go to **Selection** > **View Position History**. The *View Position History* window opens:



3. Switch to the **Allowance Details** tab to show the detail of the allowances:



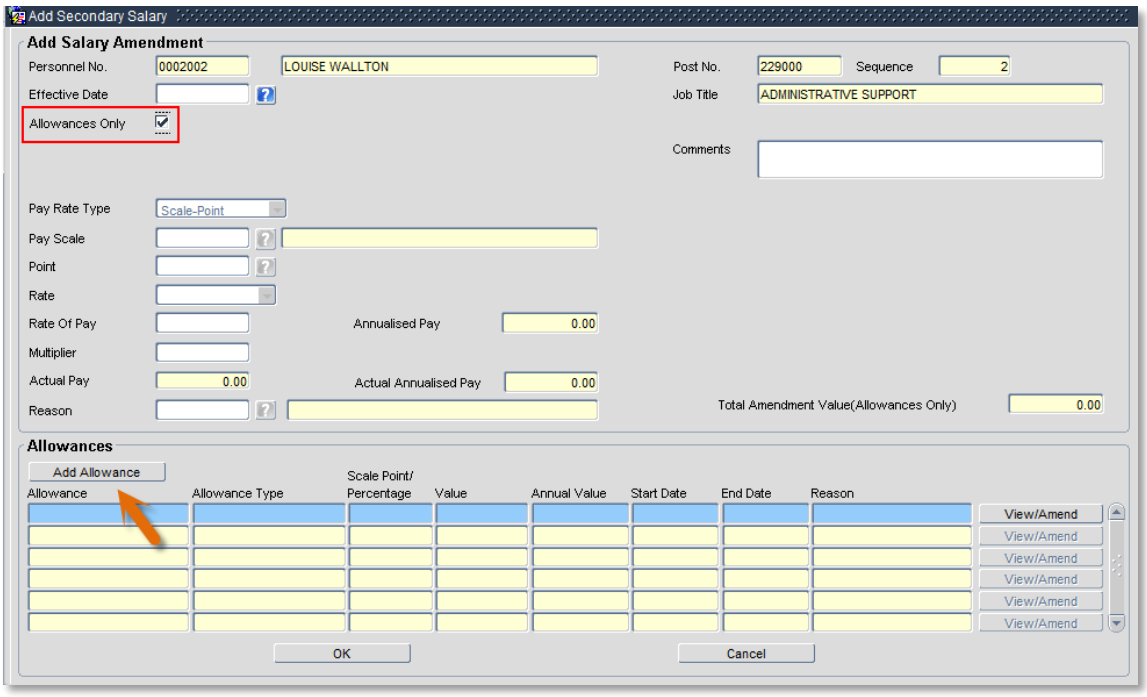
4. Exit back to the Post Appointment Maintenance window.

b. Setting up a new allowance

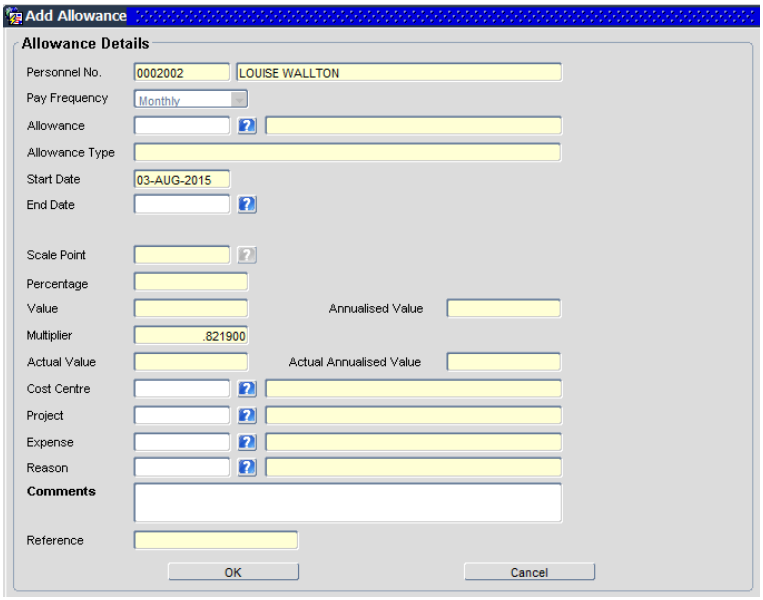
Setting up a new allowance will overwrite the previous allowance e.g. to reflect the reduced FTE.

1. Go to **Selection** > **Amend Pay Rate**.

2. Enter the **Effective Date** for the change and select the **Allowances Only** tick box.



3. Click the Add Allowance button. The *Add Allowance window* opens:



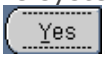
4. Complete the Allowance Details screen as below.

For fields marked ■ below – depending on the allowance selected either Scale Point, Percentage or Value will be used. See the *Allowance Guide* for more information.

Field Name (* mandatory)	**Description**
Allowance *	Select the relevant allowance from the list:
Allowance Type	This will populate depending on the allowance selected. For **Scaled** allowances refer also to the **Allow. Multiplier** section below.
Start Date *	Check that the Start Date was entered correctly – Effective Date entered earlier.
End Date *	Enter the end date if relevant. **Note:** If the end date is left blank, payment will be paid continually.
Scale Point ■	If relevant, select Scale point, this will relate to a rate table.
Percentage ■	If relevant, enter % to be applied.

Value ■	If relevant, enter the value of the allowance, e.g., 200 for a £200 per month allowance. Press tab – the system will automatically calculate the annualised value. **Note:** Most allowances are paid in full, i.e. the amount entered will not be prorated to take account of FTE, ensure value entered takes account of FTE and salary multiplier.
Allow. Multiplier	Relevant for **Scaled** allowances only - enter % of allowance, e.g. 50 if only 50% of the scaled allowance is to be paid.
Cost Centre *	Select the relevant cost centre **Note:** Cost centre needs to be specified here ONLY if the funding for the allowance is from a different cost centre to the funding for this appointment.
Project *	Select the relevant Project code. **Note:** Project code needs to be specified here ONLY if the funding for the allowance is from a different project code to the funding for this appointment.
Expense	Leave blank - this field is not used by the University.
Reason *	Select the relevant reason code, e.g. **Decrease in Hours**.
Comments*	Enter comments to state the reason for the change including the approval code if applicable. (Refer to **QRG: CH4_New and changes to permanent allowances** for guidance on entering comments according to the type of allowance being added.)
Reference	No longer in use. References entered previously will still be displayed.

5. Click . The Add Allowances window closes.

6. Click . The system will ask if you are sure you want to add this salary amendment. Click  . The *Maintain HR Salary Amendments* window opens.

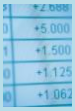
7. If you have Salary Approval access and it is appropriate to do so you can approve the salary and/or allowance change straight away.

8. Exit all windows back to the Personnel main screen.

CH3 - Changes to hours

NEXT STEPS: Unless you were able to approve the salary/allowance changes, they will now appear in your approver's list for approval. Approvers should refer to **QRG: FD5_Approve (or Reject) Salary/ Allowances** for guidance on approving.

A letter to confirm the changes should also be sent to the individual. A template is available in Tools > Letters: Change in Hours.



Useful Reports
To help track changes, including changes to hours don't forget to regularly run PERDEP20_Monthly Personnel Changes