

CH7 – Changes due to long term sickness

Where an individual is absent from work due to illness for more than 7 days it becomes necessary to consider whether their appointment, pay and allowances (if relevant) must be adjusted accordingly (timing dependent on length of service). Where a change is made, this must be reviewed when they return to work. This guide must be followed where the absence has resulted in a change to any of the following:

What's changed?
Screenshots replaced following the implementation of Self-Service.
September 18

- Half pay
- Nil pay
- Full pay (returned to work)

Any such changes will need to be approved within the CoreHR system. Approvers should refer to **QRG: FD5_Approve (or Reject) Salary/ Allowances** for guidance on approving.

This guide covers the following process steps:

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 **Note:** If the employee has more than one fixed hours/standard appointment, this process will need to be repeated for each of them.

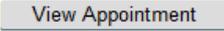
Refer to the **Personnel Services** website for detailed guidance on sickness pay.

Navigate to: Personnel > Maintenance > Personal Profile

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

1. Amend Appointment

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

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

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1.2. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

The screenshot shows the 'Amend Appointment Details' window for Louise Wallton. It contains the following sections:

- Post Details:** Post Number (229000), Post Profile Type (1A), Effective Date (21-MAY-2018), Target End Date, Planned End Date, Status (Commenced).
- Hierarchy Details:** Company (10 - UNIVERSITY OF OXFORD), Division (20 - FUTURE TECHNOLOGIES), Sub Division (SD00 - FUTURE TECHNOLOGIES), Level 4 (9ZW001 - FUTURE TECHNOLOGIES), Management Unit (9ZW0 - FUTURE TECHNOLOGIES), Department (ZW - INSTITUTE OF FUTURE TECHNOLOGIES), Pay Administered by (ZWDEP - FUTURE TECHNOLOGIES), Cost Centre (ZW0000000000 - INSTITUTE OF FUTURE TECHNOLOGIES), Location (991 - ZW - FUTURE TECHNOLOGIES), Work Group (100002 - ZW Admin Support), College Association (1 - DEFAULT/NOT APPLICABLE).
- Appointment Details:** Post Type (1A - PERMANENT), Project, Job Category, Job Title (ADM - ADMINISTRATIVE SUPPORT), Employee Status (1A - PERMANENT), Sub Status (3 - PART TIME), Category (X - NOT APPLICABLE/NOT REQUIRED), Sub Category (DC - OFFICE/ CLERICAL SUPPORT), Hours (30.00), FTE Hours (36.50), FTE Weeks (52.0000), FTE% (82.19), Future Override FTE, Absence Mgt FTE, Pensionable, Acting Up Ind, Secondment, Action (SCK - SICKNESS), Reason Code (SCKHP - SICKNESS HALF PAY), Replaces Employee, Comments.
- Post Details (Text Area):** Please enter the post information for the employee on this screen. Details such as department, job title and cost centre may be entered here.

1.3. Enter the appointment change details:

Field Name (* mandatory)	Description
Effective Date *	Enter the date that the change to the rate of pay will take place.
Target End Date	For fixed term posts, reapply the current target end date (noted previously), to confirm it still correct.
Action *	Enter the relevant action e.g. Sickness
Reason Code *	Enter the relevant reason code e.g. Sickness Half Pay
Comments *	Enter any relevant comments.

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

2. Amend Pay

2.1. Click the **Appointment Details** button. The Post Appointment Maintenance window opens.

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



2.3. Update the employee's pay record as follows:

a. When changing to half pay

Field Name (* mandatory)	Description
Effective Date *	Start of pay change.
Multiplier *	Change to half of previous e.g. 0.5 for a full time post.
Actual Pay *	Will change to half of previous pay.
Reason *	Select reason e.g. Sickness Half Pay .
Comments *	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

b. When changing to no pay

Field Name (* mandatory)	Description
Effective Date *	Start of pay change.
Multiplier *	Change to 0 .
Actual Pay *	Changes to 0.
Reason *	Select reason e.g. Sickness No Pay .
Comments *	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

c. When returned to work

Field Name (* mandatory)	Description
Effective Date *	Start of pay change.
Multiplier *	Change to previous e.g. 1 for a full time post.
Actual Pay *	Will change back to original full pay.
Reason *	Select reason e.g. Sickness Returned
Comments *	Enter comments to explain why the pay change has been made. This will be visible to the pay approver and payroll.

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- 2.4. Click . The *Add Salary Amendment* window closes.
- 2.5. Click . The system will ask if you are sure you want to add this salary amendment. Click .

The Maintain HR Salary Amendments window opens.

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)

Viewing current allowances

- 3.1. To view the employee's allowances, from the *Appointment Details* window click the button. The *Post Appointment Maintenance* window opens.
- 3.2. Go to **Selection > View Position History**. The *View Position History* window opens:



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

Status	Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason
Approved	Misc Non Pens Payment	Variable Value		100.00	1200.00	14-JUL-2015	13-JUL-2016	ALLOWANCE AWARDED

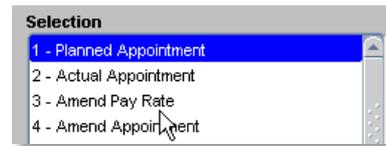
- 3.4. Exit back to the Post Appointment Maintenance window.

Setting up a new allowance

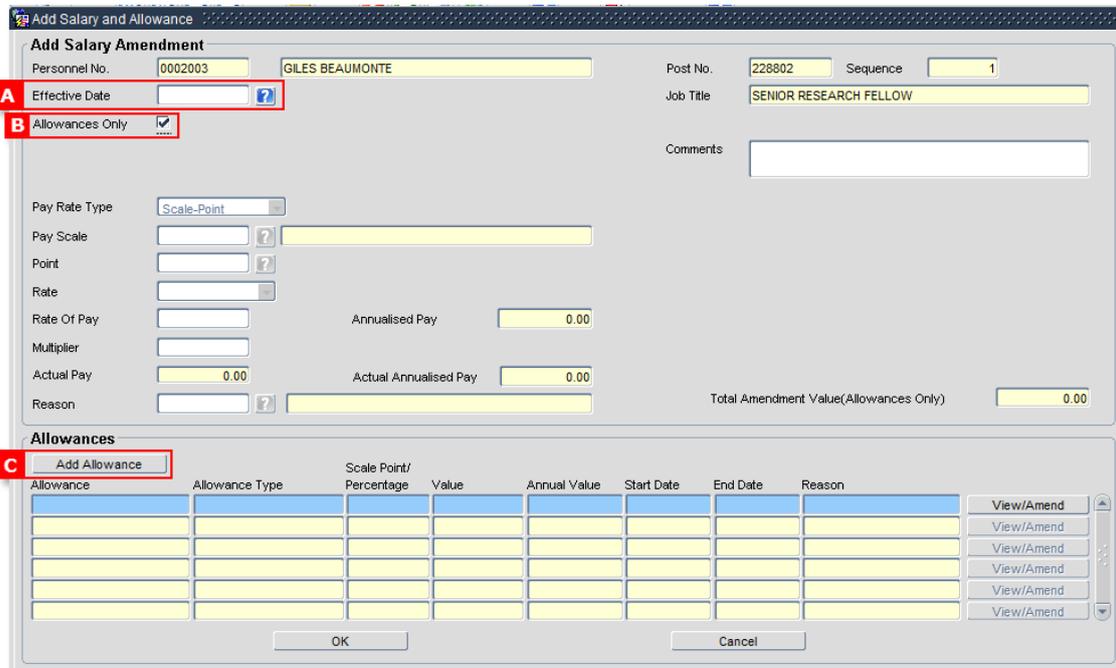
Setting up a new allowance will overwrite the previous allowance.

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3.5. Go to Selection > Amend Pay Rate.



The *Add Salary and Allowance* window opens:



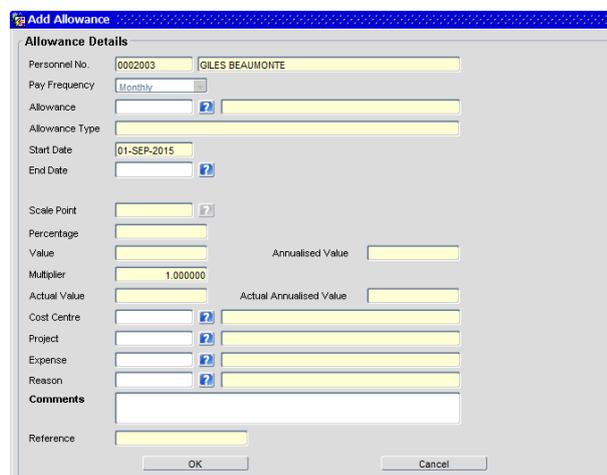
3.6. To set up a new allowance enter the **Effective Date [A]**. This should be the same as the effective date of the appointment change.

3.7. Click the checkbox **Allowances Only [B]**.

3.8. Click the **Add Allowance [C]** button. The *Add Allowance* window opens

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

3.10. Complete the **Allowance Details** screen as below.



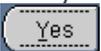
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Field Name (* mandatory)	Description
Allowance *	Select the relevant value from the list, e.g. Standby and call out pay cash.
Allowance Type 	This will populate depending on the allowance selected. For Scaled allowances refer also to the Allow. Multiplier section below.
Start Date *	Check the start date has been entered correctly
End Date * 	Enter the end date if required. If the end date is left blank, the allowance will be paid continually. Note: Acting up should not be for longer than 12 months. (For Acting Up allowance always enter the planned end date)
Dependent upon the type of allowance selected you now need to enter either the Scale point, Percentage or Value as described below:	
Scale Point	If relevant, select Scale point, this will relate to a rate table.
Percentage 	If relevant, enter % to be applied. E.g. if sick half pay enter 50% or half of the current FTE. Note: For Percentage Allowances see note under Cost Centre/ Project
Value 	If relevant, enter the value of the allowance, e.g. 200 for a £200 per month allowance then press tab – the system will automatically calculate the annualised value. Note: Most allowances are paid in full as they are entered, i.e. the amount entered will not automatically be prorated to take account of FTE. Ensure the value entered takes account of FTE and salary multiplier. Note: Acting up value is calculated manually. E.g. current grade 05S pt 8 to acting up grade 06S pt 5 . Deduct the annual salary of the lower grade from the annual salary of the higher grade and divide by 12 to give monthly value: 06S pt5 £29,099 - 05S pt8 £28,251 = £848.12/12 . The value to enter in this scenario would be 70.67 per month (remember to pro-rata if part time).
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 *	<i>(For each line entered)</i> If the salary is being paid from a project, select or enter 'CCPROJ'. If the salary is being paid from a GL cost centre, select/enter the relevant GL code in the format

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	<p>AA999999999 where AA is the 2 digit department code. <i>See row 1 in the example below.</i></p> <p>Note: For percentage allowances the cost allocation must be entered otherwise the allowances will be charged to the default cost centre on the appointment. For value and scaled allowances costing information only needs to be entered if the allowance will be funded from a different source to that recorded on the Cost Allocation screen.</p>
<p>Project *</p>	<p><i>(For each line entered)</i> If you have already entered a GL code, leave this field blank.</p> <p>If the salary is being paid from a project, select the relevant Project Code in the format AAXXXXXX.0000 where AA is the 2 digit department code. Take care to check the correct code has been selected. <i>See row 2 in the example below.</i></p>
<p>Expense</p>	<p>Leave blank - this field is not used by the University.</p>
<p>Reason *</p>	<p>Select the relevant reason code, e.g. Allowance Awarded or Acting Up Start.</p>
<p>Comments*</p>	<p>Enter comments as applicable.</p>
<p>Reference</p>	<p>No longer in use. References entered previously will still be displayed.</p>

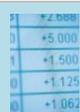
3.11. Click . The *Add Allowances* window closes.

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

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

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

NEXT STEPS: Unless you were able to approve the salary change, it 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.



1	+5.000
1	+1.500
0	+1.125
0	+1.062

Useful Reports

To help track absence don't forget to regularly run:
PERDEP45 Employee Absence