

IP6 - Tracking changes and correcting records

This guide is designed to help users of CoreHR track changes to an employee's appointments and salary, and when necessary make corrections to their records.

What's changed?
New section added with guidance on ending UDF's.
Aug 19

This guide covers the following process steps:

A.	View employment history	1
B.	View salary history	4
	Salary Details tab	5
	Rate of Pay	7
	Allowance Details tab	8
	Other tabs	9
C.	View ended appointment details	10
D.	Making corrections to salary	10
E.	Making corrections to appointments (including casuals)	12
F.	End date the previous record when adding an additional same UDF	13

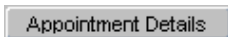
Note: Section E of this guide should only be followed when correcting errors on an appointment; this includes correcting Category, Sub Category, Job text, Employee status or Sub status, an incorrectly assigned Work Group, or assigning a Work Group to a recent starter.



Section E should not be used to record a genuine appointment change; this includes recording genuine changes to the Work Group, or assigning a Work Group to a starter who has had subsequent appointment changes. In these instances you should follow the relevant QRG (e.g. QRG CH6 Changes to Appointment) to record the appointment change.

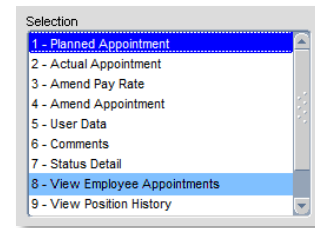
A. View employment history

Navigate to: CorePersonnel > Maintenance > Personal Profile

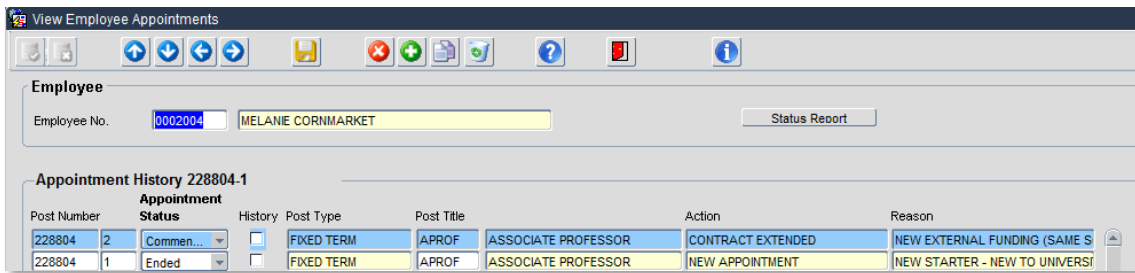
1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. From the Appointment Details window click the  button. The Post Appointment Maintenance window opens.

IP6 - Tracking changes and correcting records

3. Go to **Selection > View Employee Appointments**



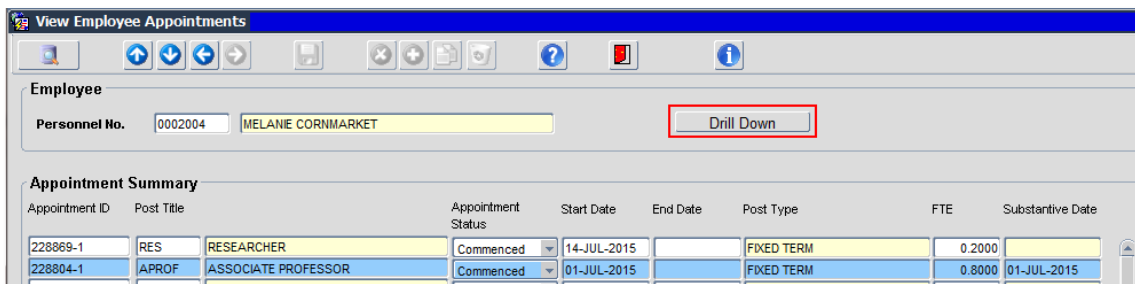
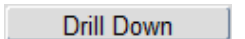
Where an employee has had one appointment at a time (i.e. always substantive) you will go straight to the screen displaying appointment history as shown below:



This screen shows summary information for every appointment, past and present.

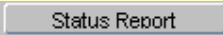
Where an employee has multiple appointments these will be displayed under appointment summary.

4. To view further details of the post click on the appointment ID and select



5. Use the scroll bar at the bottom of the screen to see more information including grade, dates and FTE. This screen is very useful for understanding how an employees appointments(s) have changed over time and why (**Reason**).



Note: Click  to produce a summary of status information and activity. This can be useful for tracking entry dates, but it isn't particularly user-friendly and we wouldn't recommend it for general use.

IP6 - Tracking changes and correcting records

- To view full details of the appointment make sure the correct appointment is selected by clicking on the appointment ID and then click the button to open *View Appointment Details*:

This allows you to see more information, including any **Comments**.

Note: Where multiple appointments exist you must first drill down before the icon is active.

- Click to close this window.
- Where the **History** column is ticked, more than one change has been made to this appointment on the same day. Click on to show the latest change.

Post Number	Appointment Status	History	Post Type	Post Title	Action	Reason		
228804	2	Commen...	<input checked="" type="checkbox"/>	FIXED TERM	APROF	ASSOCIATE PROFESSOR	CONTRACT EXTENDED	NEW EXTERNAL FUNDING (SAME S
228804	1	Ended	<input type="checkbox"/>	FIXED TERM	APROF	ASSOCIATE PROFESSOR	NEW APPOINTMENT	NEW STARTER - NEW TO UNIVERSI

IP6 - Tracking changes and correcting records

9. Double click into the **Post Number** field to see the details of the previous change(s):

The screenshot shows the 'Appointment History' window. At the top, there are fields for Post (228804), Start Date (01-AUG-2015), and Reason (NEW EXTERNAL FUNDING (SAME SOURCE)). Below this is a 'View History' table with columns for Date Input, Post Instance, Reason, and Target End Date. The first row shows a date of 03-AUG-2015 11:30:48, Post Instance 1, Reason NEW EXTERNAL FUNDING (SAME SOURCE), and Target End Date 31-JUL-2019. The 'History Details' section contains various fields for Company, Division, Sub Division, Level 4, Management Unit, Department, Pay Administered by, Cost Centre, Location, Work Group, College Association, Post Type, Project, Job Category, Job Title, Employee Status, Sub Status, Category, Sub Category, Hours, FTE Hours, Pensionable, Action, Reason, and Comments. The 'Reason' field is set to 'NEW EXTERNAL FUNDING (SAME SOURCE)'.



Note: To view details of historic appointments, including cost allocations, please follow the instructions in Section C.

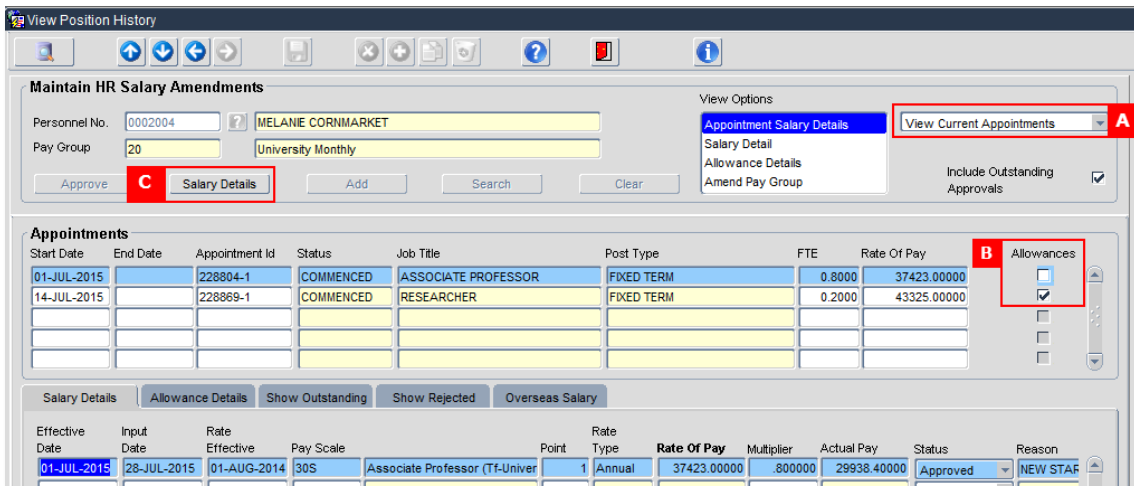
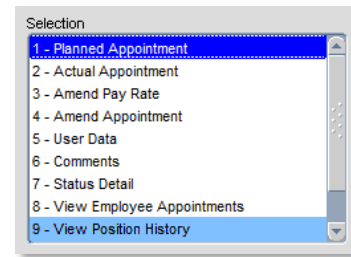
B. View salary history

Navigate to: CorePersonnel > Maintenance > Personal Profile

1. Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. From the Appointment Details window click the **Appointment Details** button. The Post Appointment Maintenance window opens.

IP6 - Tracking changes and correcting records

- Go to **Selection > View Position History**. The *View Position History* screen opens:



This screen contains a lot of useful information about an employee’s salary history and permanent allowances.

- As a default the View will show Current Appointments only. Select View All Appointments [A] to see historic appointment details.
- The middle section of the screen shows basic appointment details. If more than one appointment exists, click into the relevant row to view the related Salary Details. The Allowances tick box [B] shows if allowances exist for this appointment.

The bottom section is split into tabs containing salary and allowance details for the selected appointment. The first tab shows the Salary Details.

Salary Details tab

Each row represents a change in salary. They are displayed in **Effective date** sequence with the most recent at the top.

Field Name	Description
Effective date	Date this salary record took effect (or will take effect if in the future).
Input Date	Date the record was input or date it was approved. Sequence of processing in CorePay is driven by Effective date and Date Input.

IP6 - Tracking changes and correcting records



Rate effective	Date rate of pay was last updated for this grade and point.
Pay Scale	Grade related to salary. X99 is used for Casual appointments. N99 is used for non-employee appointments e.g. visitors.
Point	Grade stage.
Rate Type	Normally Annual.
Rate of Pay	Annual Salary for the Pay Scale and Point at the Effective Date.
Multiplier	1 = full time
Actual Pay	Rate of pay * Multiplier
Status	<p>Outstanding or Approved.</p> <p>Salaries approved by Personnel but not yet approved in CorePay will still have a status of Outstanding. It is possible to see the actual approval status in reporting.</p> <p>New starters and re-hires salary and allowance records will go straight to status of Approved.</p> <p>Currently when the new starter is approved in CorePay a second salary details line is created with the same details to reflect the second line of approval. This should be a temporary 'feature' of the system.</p>
Reason	Reason related to appointment or pay change.

6. From the Salary details tab, the Salary Details button **[C]** opens another screen as follows:

IP6 - Tracking changes and correcting records

Salary Details for Appointment 228869-1

Personnel No. 0002004 MELANIE CORNMARKET

Effective Date 14-JUL-2015 Enquiry Date 14-JUL-2015 Rate Annual

Date Input 28-JUL-2015 Rate Of Pay 43325.00 Annualised Pay 43325.00

Pay Rate Type Scale-Point Multiplier 200000

Pay Scale 08S STANDARD GRADE 8 Actual Pay 8665.00 Actual Annualised Pay 8665.00

Point 5 Total Salary (incl. Allowances) 9865.00

Comments

Increment Details

Increment Due Date 01-OCT-2016 Qualification Ind History

Comments Increment Hold Ind Save Increment Changes

Allowances

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

Close

The total salary shown includes Approved Allowances.

This is where you can view and update the **Increment Due Date**. See **QRG: CH17_Changes: Increment Due Date** for further details.

7. Select the  button to return to *View Position History*.

Rate of Pay

Each change in the rate of pay for a grade and point is shown on a separate line in salary details.

Blank values in a row mean no change in grade/scale from the line above e.g. In the screen shot below, the grade and scale point last changed in Aug 2006 as seen in the top row. The rows below with no effective date show when cost of living increases were applied.

IP6 - Tracking changes and correcting records

Appointments									
Start Date	End Date	Post No.	Status	Job Title	Post Type	FTE	Rate Of Pay	Allowances	
01-MAR-1998		102709	COMMENCED	UNIVERSITY LECTURER	PERMANENT	1.00	48293.00000	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

Salary Details												
Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason		
01-AUG-2006	17-DEC-2011	01-AUG-2011	30S	11	Annual	48293.00000	1.00000	48293.00000	Approved	UPLIFT201		
		01-AUG-2010			Annual	48167.00000	1.00000	48167.00000	Approved	PAY AWA		
		01-AUG-2009			Annual	47974.00000	1.00000	47974.00000	Approved	PAY AWA		
		01-OCT-2008			Annual	47736.00000	1.00000	47736.00000	Approved	PAY AWA		
		01-MAY-2008			Annual	45461.00000	1.00000	45461.00000	Approved	PAY AWA		
		01-MAY-2007			Annual	44137.00000	1.00000	44137.00000	Approved	PAY AWA		
		01-FEB-2007			Annual	42851.00000	1.00000	42851.00000	Approved	PAY AWA		
		01-AUG-2006			Annual	42427.00000	1.00000	42427.00000	Approved	STANDAR		
01-MAR-1998	17-DEC-2011	01-AUG-2005	A01	15	Annual	39346.00000	.02700	1062.34200	Approved	PAY AWA		

Allowance Details tab

This tab is in a different format.

Salary Details									
Allowance Details									
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	

Field Name	Description
Status	Outstanding or Approved. Allowances approved by Personnel but not yet approved in CorePay will still have a status of Outstanding. It is possible to see the actual approval status in reporting.
Allowance	Allowance description.
Allowance Type	Variable Value, Scaled or Fixed Percentage.
Scale Point/ Percentage	This is a shared column. Refer to Allowance Type column to confirm the contents of this field.
Value	Monthly value.
Annual Value	Simple calculation of annual value, does not take account of end date.
Start Date	Date Allowance will be paid from.
End Date	Date Allowance ended (or will end).

IP6 - Tracking changes and correcting records

Reason	Reason related to allowance.
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8. From the Allowance details tab, the Salary Details button **[C]** opens another screen as follows:

This allows you to see more details of the allowance such as costing details and reference field. This is also where you would go to amend an allowance to add an end date. Refer to **QRG: CH12_End Allowances** for more information.

Reference gets overwritten by CorePay when the allowance is processed.

Comments should be used to communicate additional information such as acting up grade and point. For full guidance please refer to the **QRG: CH4_New and changes to permanent allowances**.

Other tabs

Show Outstanding - as Salary Details but just those items with status **Outstanding**.

Show Rejected - as Salary Details but showing salary records that have been rejected. Salary rejections will also generate an email to the person who entered the change. The email shows more information than this screen e.g. it includes the Rejection comment and single sign-on of the person who rejected it.

Overseas salary - tab is not used.

IP6 - Tracking changes and correcting records

C. View ended appointment details

Navigate to: Personnel > Maintenance > Personal Profile

It is possible to view details of historic appointments including Cost Allocations, User data, Employee Appointments etc as follows:

1. Search for the employee record and go to **Select Detail box > Appointment Details**. The *Appointment Details* window opens.
2. The default is **Show My Current**. Change this as required to show only ended or all appointments.



Note: For ended appointments not in your department, only the **View Appointment** button will be active. If the organisation structure of the ended appointment is no longer valid then the system will display a warning message. Select OK and continue to view the appointment details.

D. Making corrections to salary

When entering any salary change it is important to check the details of any recent changes that have been entered into the CoreHR System first, otherwise errors can occur.

The example below shows a scenario where two changes weren't entered in chronological order and have overlapped with each other. The result is not as required and corrections need to be applied. This example involves an increment but it could be any combination of overlapping changes.

The sequence of events was:

[A] Annual increment applied effective 1st October 2012 which increased salary to point 6.

[B] Then a pay change was entered to reflect a decrease in hours. This change had an earlier effective date than the increment.

IP6 - Tracking changes and correcting records

Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason
A 01-OCT-2012	15-OCT-2012	01-AUG-2011	07S Standard Grade 7	6	Annual	33884.00000	1.00000	33884.00000	Approved	ANNUAL IN
B 22-SEP-2012	15-OCT-2012	01-AUG-2011	07S Standard Grade 7	6	Annual	33884.00000	.86670	29367.26280	Approved	DECREASE
14-SEP-2012	28-SEP-2012	01-AUG-2011	07S Standard Grade 7	5	Annual	32901.00000	1.00000	32901.00000	Approved	ALLOWAN
14-SEP-2012	13-SEP-2012	01-AUG-2011	07S Standard Grade 7	5	Annual	32901.00000	1.00000	32901.00000	Approved	NEW APPC

Impacts:

- (1) Annual increment **[A]** has later Effective Date but it doesn't reflect the decrease in hours (multiplier).
- (2) Decrease in hours **[B]** has correct multiplier but wrong Point, it should have been at point 5, not point 6.

Solution: Addition of 2 extra changes as follows:

- [C]** – back dated to same date as change in hours **[B]**, to correct Point back to 5.
- [D]** – back dated to same date as the annual increment **[A]** to align multiplier to new hours.



Note: When multiple salary changes entered with the same Effective Date, the later Input Date will take precedent.

Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason
A 01-OCT-2012	17-OCT-2012	01-AUG-2011	07S Standard Grade 7	6	Annual	33884.00000	.86670	29367.26280	Approved	ANNUAL IN
B 01-OCT-2012	15-OCT-2012	01-AUG-2011	07S Standard Grade 7	6	Annual	33884.00000	1.00000	33884.00000	Approved	ANNUAL IN
C 22-SEP-2012	17-OCT-2012	01-AUG-2011	07S Standard Grade 7	5	Annual	32901.00000	.86670	28515.29670	Approved	DECREASE
D 22-SEP-2012	15-OCT-2012	01-AUG-2011	07S Standard Grade 7	6	Annual	33884.00000	.86670	29367.26280	Approved	DECREASE
14-SEP-2012	28-SEP-2012	01-AUG-2011	07S Standard Grade 7	5	Annual	32901.00000	1.00000	32901.00000	Approved	ALLOWAN
14-SEP-2012	13-SEP-2012	01-AUG-2011	07S Standard Grade 7	5	Annual	32901.00000	1.00000	32901.00000	Approved	NEW APPC



Note: Refer to Quick Reference Guides as follows: **QRG: CH3_Change to Hours** & **QRG: CH5_Change to Pay**.

Guidance re making pay changes around the same time as increments

When applying changes to an employee's multiplier around the same time as the annual increments process, it is advisable to follow these rules:



1. If the Effective date of the change *predates* the increment due date, then enter the change into Core at least 2 days before the increment is due.
2. If the Effective date of the change is *on or after* the increment due date, then allow the increment to be applied first and then come back and make the subsequent change.

E. Making corrections to appointments (including casuals)

Occasionally it is necessary to correct a current appointment e.g. to add missing data not entered during the appointment wizard or amend details entered incorrectly.

This guidance can be followed for all appointments including casuals.



Note: You cannot change hierarchy information (Division through to Pay admin by) on an appointment created from a staff request. You will need to raise and submit new staff request for a new post and planned appointment.

Navigate to: CorePersonnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No.**, click and open the relevant employee record. The *Personal Profile Maintenance* window opens.
2. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
3. From the Appointment Details window click the button to open the View Appointment Details screen.

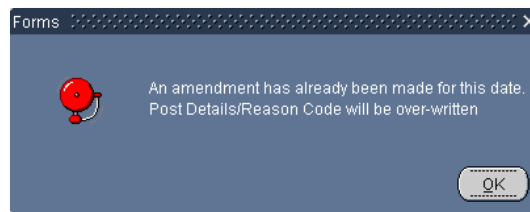
Post Details	
Post No./Sequence	228869 1 RESEARCHER
Post Profile Type	2 Fixed Term
Post Effective Date	14-JUL-2015 Target End Date 13-JUL-2017
Planned End Date	13-JUL-2017 Status Commenced

4. Check the current information, specifically the **Post Effective Date**. Click to close this window.

IP6 - Tracking changes and correcting records

5. Click the **Amend Appointment** button. The *Amend Appointment Details* window opens.

6. Set the **Effective date** to be the same as **Post Effective Date** above. A warning message will be displayed as follows.



7. Click **OK** to continue.
8. Update details as required, e.g. complete missing or incorrect data.
9. Ensure **Action** and **Reason code** are not updated.
10. Add to the **Comments** field to explain the change that has been made.
11. Click **OK** to save the change.

F. **End date the previous record when adding an additional same UDF**

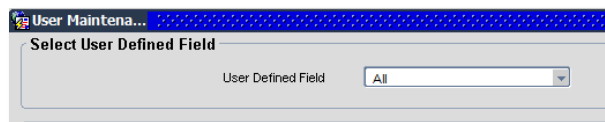
When adding a new UDF it is important to check if there is an existing record that needs ending before creating the new record.

To end the existing/previous record you **MUST** add an end date following the guidance below:

IP6 - Tracking changes and correcting records

Navigate to: CorePersonnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No.**, click and open the relevant employee record. The *Personal Profile Maintenance* window opens.
2. **Select Detail > Appointment Details.** The *Appointment Details* window opens.
3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the button. The *Post Appointment Maintenance* window opens.
4. Go to **Selection box > User Data.** The *User Maintenance* window opens.



5. Click to display **User Defined Field** List of Values.
6. Select the value for the UDF you need to end and click on **view/edit**.
7. In the **Date To** field, enter the date immediately prior to the date of the new entry.
8. Follow the instructions in the relevant QRG to add a new entry.