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.

This guide covers the following process steps:

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**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 **Appointment Details** button. The Post Appointment Maintenance window opens.
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:

![Appointment History Screen]

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 Drill Down.

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 Status Report 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.
6. 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.

7. Click to close this window.

8. 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.
9. Double click into the **Post Number** field to see the details of the previous change(s):

**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.
3. 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.

4. As a default the View will show Current Appointments only. Select View All Appointments [A] to see historic appointment details.

5. 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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective date</td>
<td>Date this salary record took effect (or will take effect if in the future).</td>
</tr>
<tr>
<td>Input Date</td>
<td>Date the record was input or date it was approved. Sequence of processing in CorePay is driven by Effective date and Date Input.</td>
</tr>
</tbody>
</table>
### IP6 - Tracking changes and correcting records

<table>
<thead>
<tr>
<th>Rate effective</th>
<th>Date rate of pay was last updated for this grade and point.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Scale</td>
<td>Grade related to salary. X99 is used for Casual appointments. N99 is used for non-employee appointments e.g. visitors.</td>
</tr>
<tr>
<td>Point</td>
<td>Grade stage.</td>
</tr>
<tr>
<td>Rate Type</td>
<td>Normally Annual.</td>
</tr>
<tr>
<td>Rate of Pay</td>
<td>Annual Salary for the Pay Scale and Point at the Effective Date.</td>
</tr>
<tr>
<td>Multiplier</td>
<td>1 = full time</td>
</tr>
<tr>
<td>Actual Pay</td>
<td>Rate of pay * Multiplier</td>
</tr>
<tr>
<td>Status</td>
<td>Outstanding or Approved. 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. New starters and re-hires salary and allowance records will go straight to status of Approved. 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.</td>
</tr>
<tr>
<td>Reason</td>
<td>Reason related to appointment or pay change.</td>
</tr>
</tbody>
</table>

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

This tab is in a different format.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Allowance</strong></td>
<td>Allowance description.</td>
</tr>
<tr>
<td><strong>Allowance Type</strong></td>
<td>Variable Value, Scaled or Fixed Percentage.</td>
</tr>
<tr>
<td><strong>Scale Point/Percentage</strong></td>
<td>This is a shared column. Refer to Allowance Type column to confirm the contents of this field.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Monthly value.</td>
</tr>
<tr>
<td><strong>Annual Value</strong></td>
<td>Simple calculation of annual value, does not take account of end date.</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Date Allowance will be paid from.</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Date Allowance ended (or will end).</td>
</tr>
</tbody>
</table>
8. From the Allowance details tab, the Salary Details button [C] opens another screen as follows:

![Alliance Details]

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.
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.
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.

Note: Refer to Quick Reference Guides as follows: QRG: CH3_Change to Hours & QRG: CH5_Change to Pay.
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**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 *precedes* 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 **Search** 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 **View Appointment** button to open the View Appointment Details screen.

4. Check the current information, specifically the **Post Effective Date**. Click **OK** to close this window.
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:
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Navigate to: CorePersonnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (Surname followed by first initial) or Personnel No., click Search 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 Appointment Details button. The Post Appointment 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.