

Manage Changes: New & Changes to Permanent Allowances

What's Changed?
 1. p3 note on *Reference* field added. (26/10/12)

A change in employment arrangements may introduce the payment of an allowance to an individual. Refer to the Allowances guide for details.

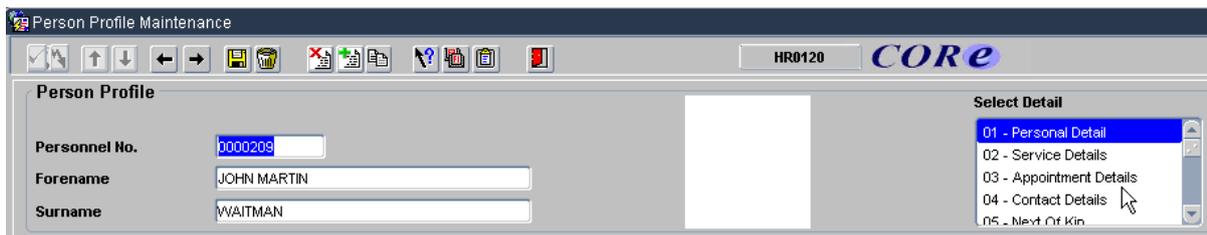
Where an individual has an existing allowance that needs to be changed a new allowance must be set-up (do not amend an allowance). The new allowance details will replace the existing allowance, a system message will warn you that the existing allowance will be ended when the new one is approved.

Allowances will need to be approved within the CoreHR system. Approvers should refer to **QRG: Approve (or Reject) Salary/ Allowances (FD5)** for guidance on approving.

 **Note:** All non-recurrent, one-off payments/ temporary allowances should continue to be managed via paper forms. Refer to Payroll for guidance.

Navigate to: Personnel > Maintenance > Personal Profile

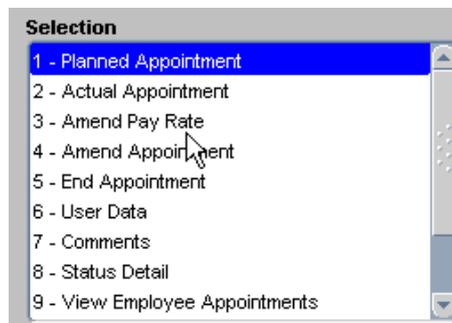
1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click and open the relevant employee record. The *Personal Profile Maintenance (HR0120)* window opens:



2. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details (PER746)* window opens.

3. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted. Click the button. The *Post Appointment Maintenance (PER620)* window opens.

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



The *Add Salary and Allowance* window opens:

5. To set up a new allowance, set the **Effective Date [A]** to the date the new allowance is to be paid from.

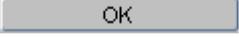
6. Click the checkbox **Allowances Only [B]**.

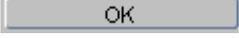
7. Click the **Add Allowance [C]** button. The *Add Allowance* window opens:

8. 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 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 was entered correctly – effective date entered earlier.
End Date * 	Enter the end date if required (for Acting Up allowance always enter the planned end date) Note: If the end date is left blank, payment will be paid continually. Acting up should not be for longer than 12 months.
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, eg 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. Note: Acting up value is calculated manually. E.g. current grade 05S point 8 to acting up grade 06S point 5 . Take the annual salary for the lower grade away from the annual salary of the higher grade and divide by 12 to identify monthly value: 06S pt5 £29,099 - 05S pt8 £28,251 = £848.12 / 12 = £70.67 per month (remember to prorate if part time). The value to enter in this scenario would be 70.67 .
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. Allowance Awarded or Acting Up Start.
Reference * 	Enter Reward Team authorisation reference if relevant. For Acting Up enter the Pay Scale and Point, e.g. 06S pt5 . Note: this field is restricted to 12 letters including spaces. After Payroll have processed the allowance the information in this field is overwritten by a system-generated reference. This confirms that the allowance has been transferred to the Payroll module.

9. Click . The *Add Allowances* window closes. Multiple allowances can be added at this time if required.

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

11. The *Maintain HR Salary Amendments* window opens. If you have Salary Approval access and it is appropriate to do so you can approve the allowance change straight away.

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

NEXT STEPS: Unless you were able to approve the allowance, the allowance will now appear in your approver's list for approval.

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A letter to confirm the changes should also be sent to the individual.