

## 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.

It is split into 4 main sections:

- [A. View Employment History](#)
- [B. View Salary History](#)
- [C. Making Corrections to Salary](#)
- [D. Making Corrections to Appointments](#)

### A. View Employment History

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:

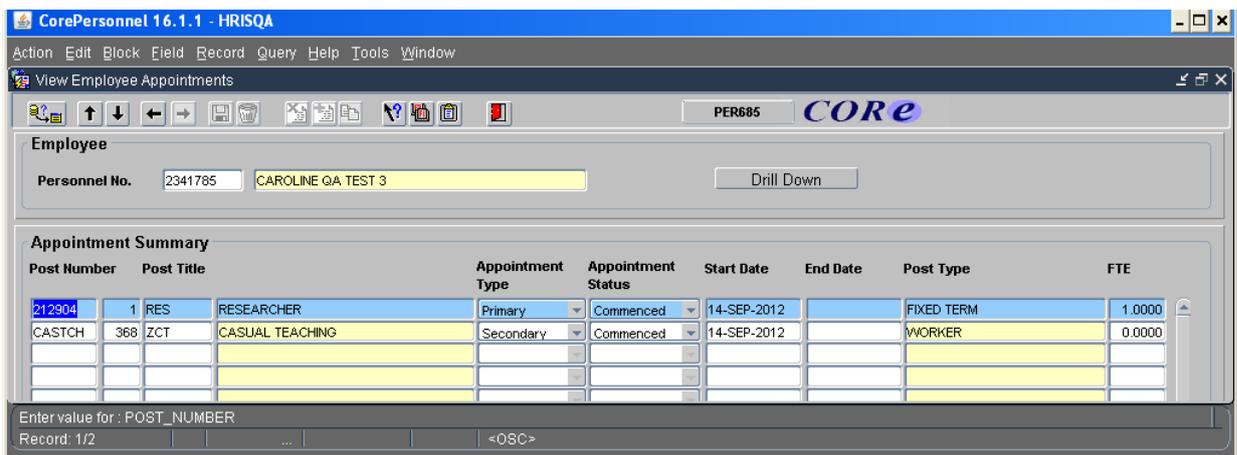
2. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details window* opens.

3. From the *Appointment Details (PER746)* window click the  button. The *Post Appointment Maintenance (PER620)* window opens.

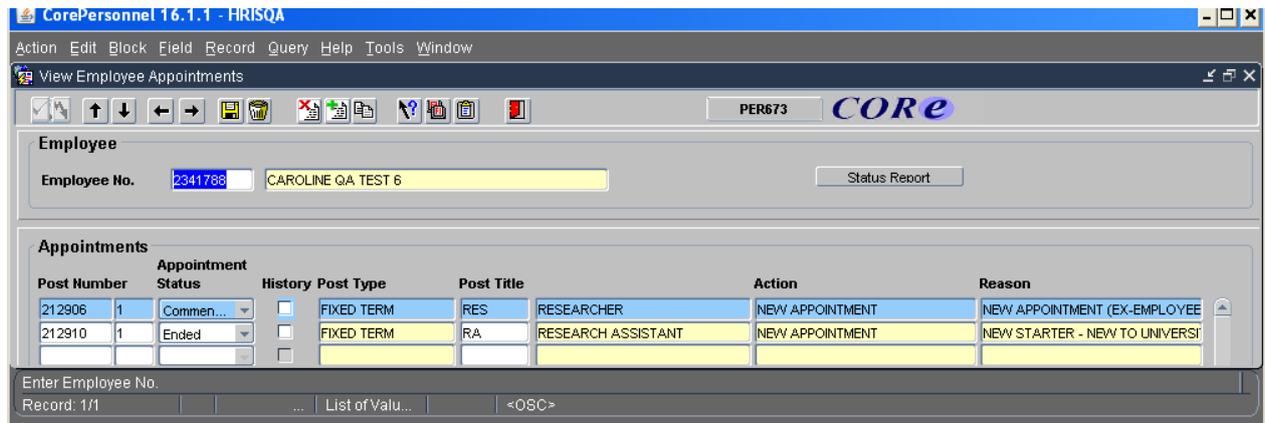


4. Go to **Selection** > **View Employee Appointments**

5. **When an employee has multiple appointments** screen PER685 will be displayed. Click into the post number of the Primary post and then click  to see the details of the employees Primary Appointments. Or click into the required Secondary appointment and then click  to see the details of that Secondary appointment in screen PER673.

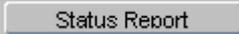


5a. Where an employee has only had one appointment at a time (i.e. always primary) you will go straight to screen PER673.

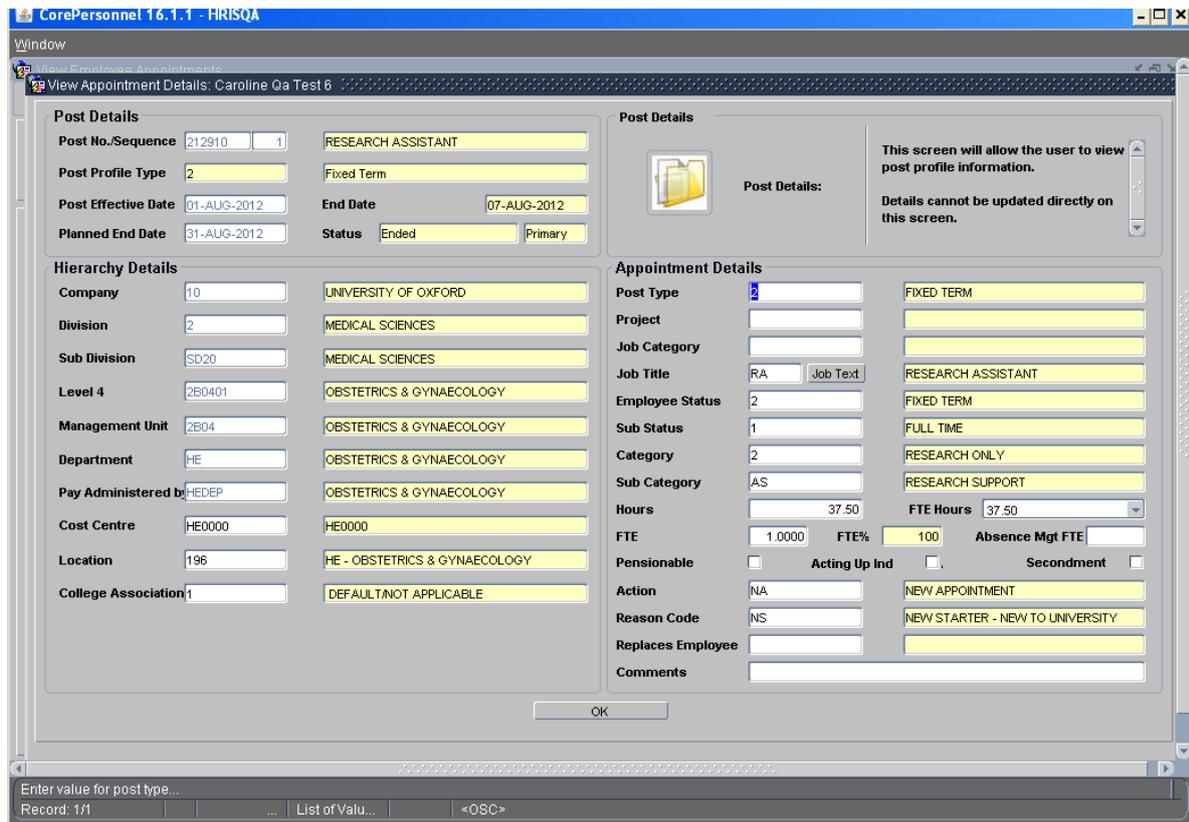


Screen PER673 shows summary information for every appointment, past and present.

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**).

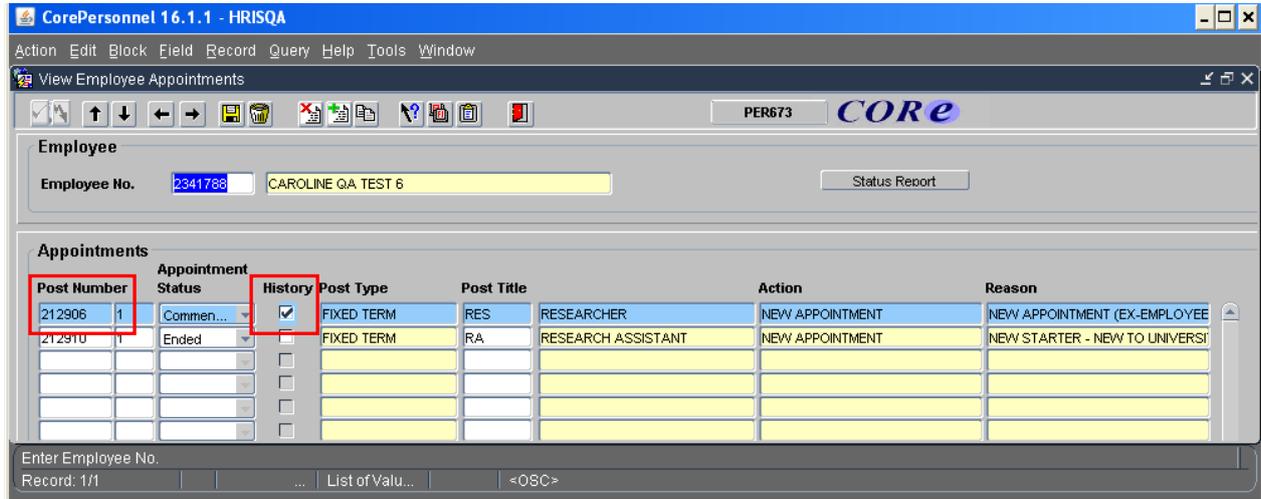
 **Note:** Click  to produce a summary of status information and activity. This can be useful for tracking entry dates, but it isn't particularly user-friendly and we wouldn't recommend it for general use.

6. To view full details of the appointment make sure the correct appointment is selected by clicking into post number and then click the  button to open *View Appointment Details*:



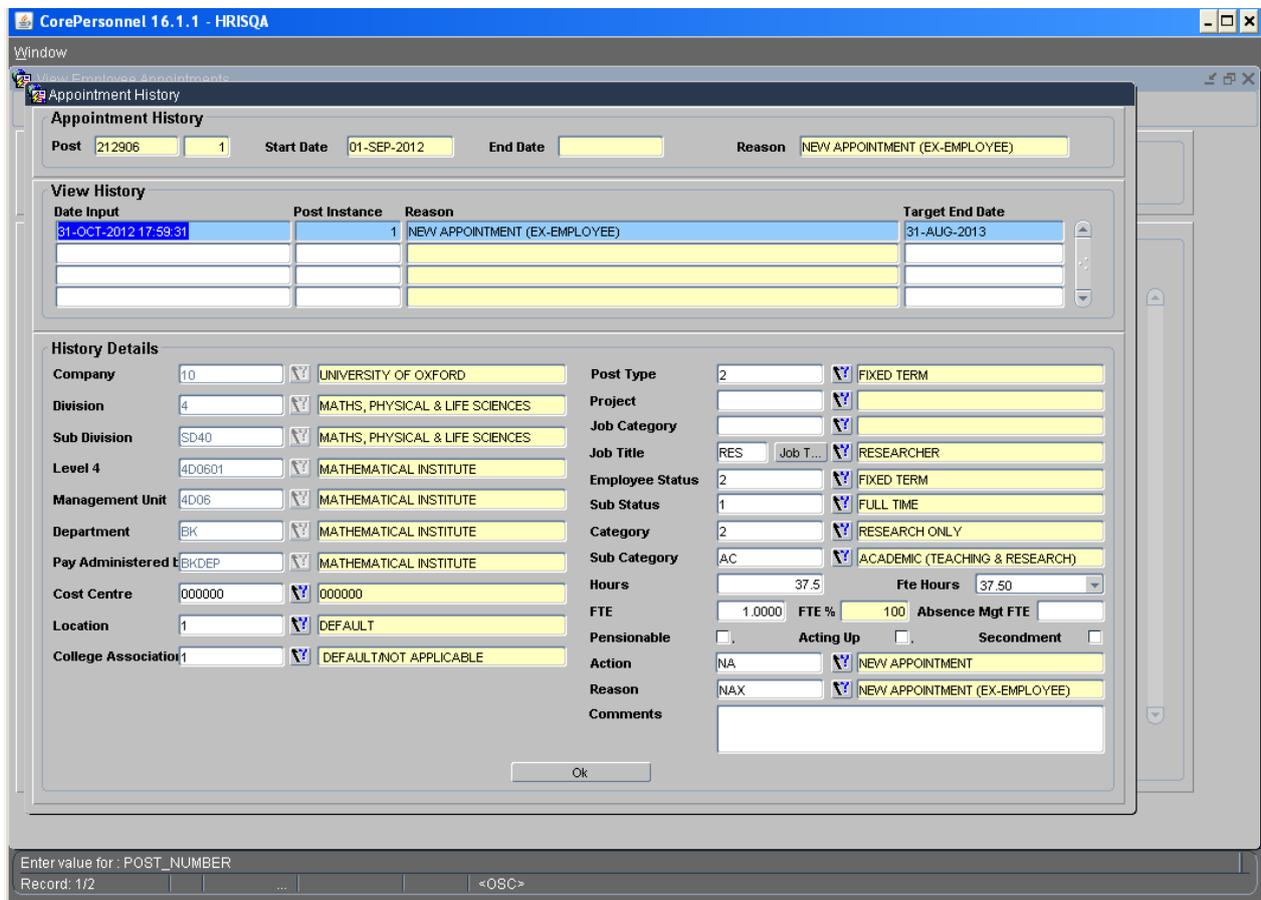
This allows you to see more information, including any **Comments**.

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.

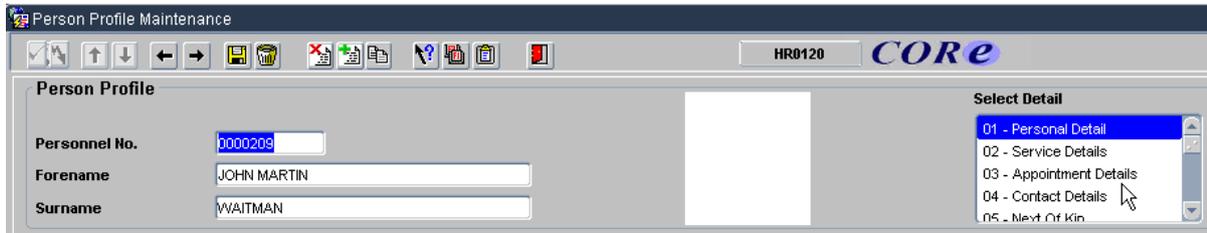
9. Double click into the **Post Number** field to see the details of the previous change(s):



**B. View Salary History**

Navigate to: Personnel > Maintenance > Personal Profile

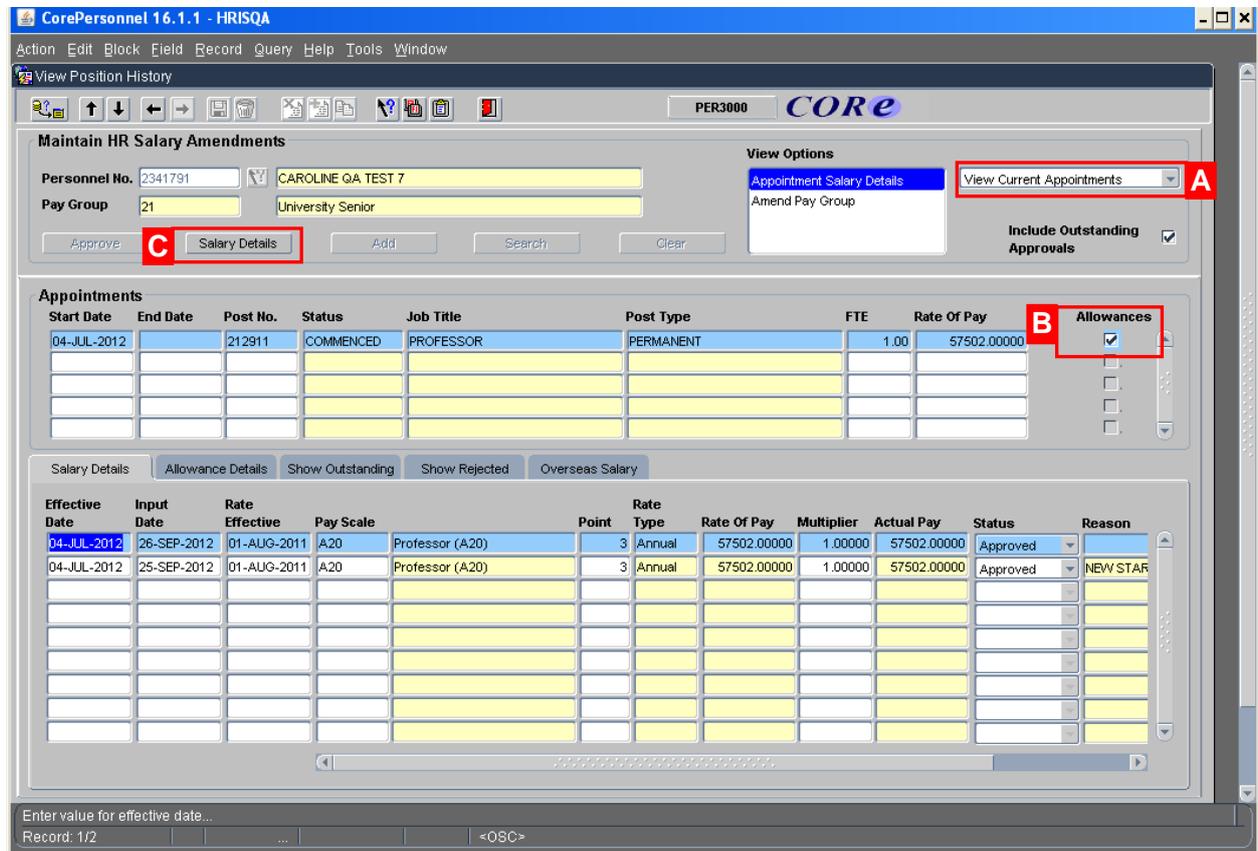
1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click  and open the relevant employee record. The *Personal Profile Maintenance (HR0120)* window opens:



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

3. From the *Appointment Details (PER746)* window click the  button. The *Post Appointment Maintenance (PER620)* window opens.

4. Go to **Selection** > **View Position History**. The *View Position History (PER3000)* screen opens:



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

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

6. The middle portion of the screen shows basic appointment details. If more than 1 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.

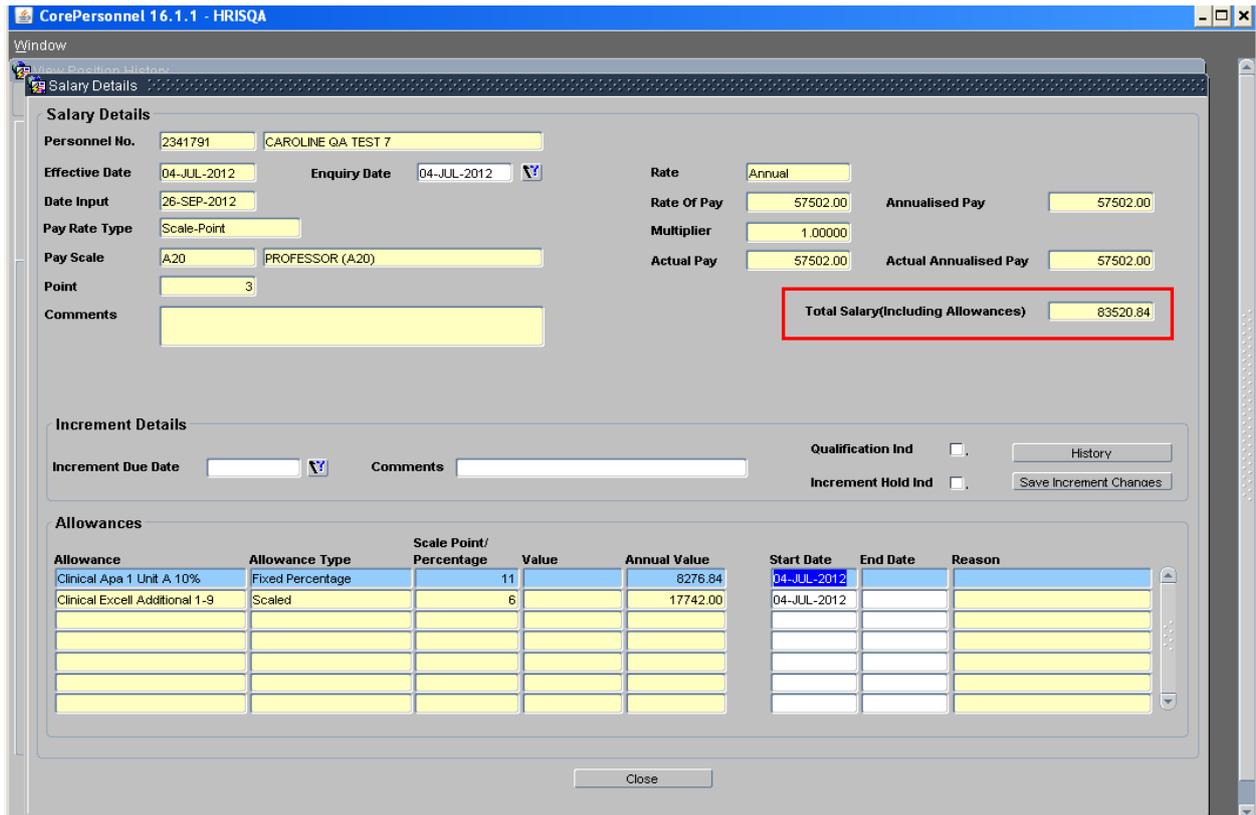
The bottom section is split into tabs containing salary and allowance details for the selected appointment. The first tab shows the **Salary Details**.

### 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
<b>Effective date</b>	Date this salary record took effect (or will take effect if in the future).
<b>Input Date</b>	Date the record was input or date it was approved. Sequence of processing in CorePay is driven by Effective date and Date Input.
<b>Rate effective</b>	Date rate of pay was last updated for this grade and point.
<b>Pay Scale</b>	Grade related to salary. X99 is used for Casual appointments. N99 is used for non-employee appointments e.g. visitors.
<b>Point</b>	Grade stage.
<b>Rate Type</b>	Normally Annual.
<b>Rate of Pay</b>	Annual Salary for the Pay Scale and Point at the Effective Date.
<b>Multiplier</b>	1 = full time
<b>Actual Pay</b>	Rate of pay * Multiplier
<b>Status</b>	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.
<b>Reason</b>	Reason related to appointment or pay change.

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

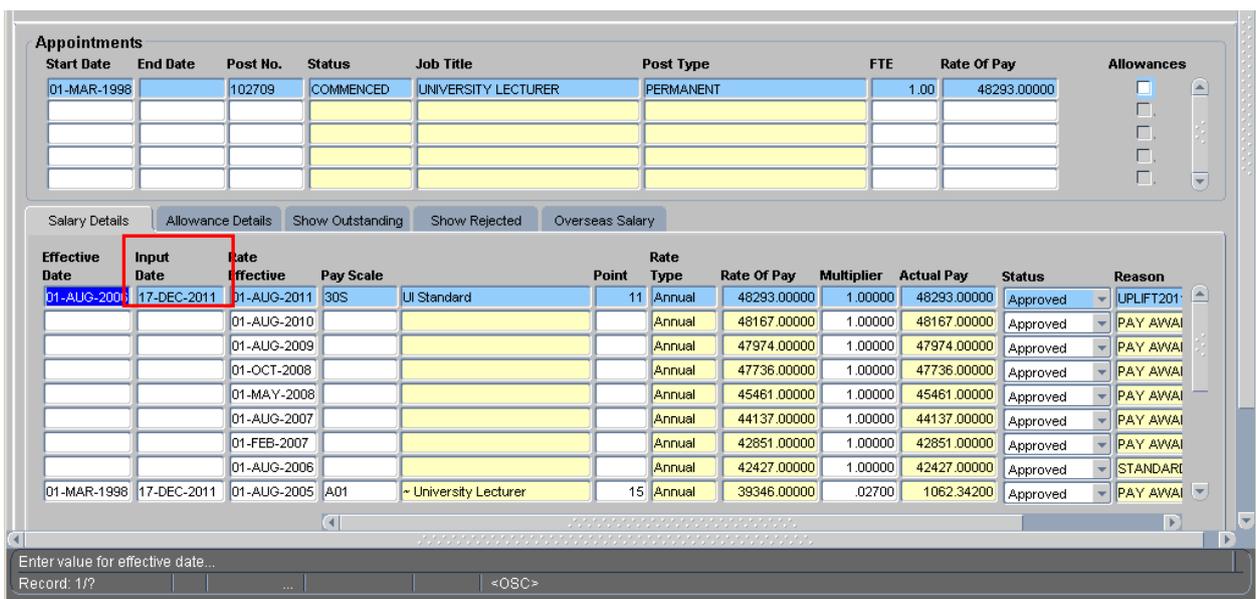


The total salary shown includes value of Approved Allowances.

This is where you can view and update the **Increment Due Date**. See QRG **CH17 Changes: Increment Due Date** for further details.

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

Rate of Pay



Changes in the rate of pay for a grade and point are show as a separate line in salary details.

Blank values in a row mean no change from line above e.g. The employee in the above screen shot has had no change to their pay scale and point since 2006 but almost annual changes to the rate of pay have resulted in 7 change records being created.

The **Reason** shown against changes to rate of pay are normally **Pay Award** or **Uplift**.

An **Input date** of **17 Dec 2011** signifies the data was created as part of the migration exercise.

**Allowance Details tab**

This tab has a different format.

Status	Allowance	Allowance Type	Scale Point/Percentage	Value	Annual Value	Start Date	End Date	Reason
Outstanding	Acting Up Allowance Np	Variable Value		25.00	300.00	04-JUL-2012		ACTING UP START
Approved	Clinical Excell Additional 1-4	Scaled	6		17742.00	04-JUL-2012		ALLOWANCE AWARDED
Approved	Clinical Apa 1 Unit A 10%	Fixed Percentage	11		8276.84	04-JUL-2012		ALLOWANCE AWARDED

Field Name	Description
<b>Status</b>	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.
<b>Allowance</b>	Allowance description.
<b>Allowance Type</b>	Variable Value, Scaled or Fixed Percentage.
<b>Scale Point/Percentage</b>	This is a shared column. Refer to Allowance Type column to confirm the contents of this field.
<b>Value</b>	Monthly value.
<b>Annual Value</b>	Simple calculation of annual value, does not take account of end date.
<b>Start Date</b>	Date Allowance will be paid from.
<b>End Date</b>	Date Allowance ended (or will end).
<b>Reason</b>	Reason related to allowance.

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

**View/Amend Allowance**

**Allowance Details**

Personnel No. 2341791 CAROLINE QA TEST 7

Pay Frequency Monthly

Allowance 421 Clinical Apa 1 Unit A 10% View Linked Allowance

Allowance Type Fixed Percentage

Start Date 04-JUL-2012

End Date

Currency

Scale Point

Percentage 11.0000

Value 689.74 Annualised Value 8276.84

Multiplier 1.00000

Actual Value 689.74 Actual Annualised Value 8276.84

Cost Centre

Project

Expense

Reason ALLA ALLOWANCE AWARDED

Reference 27020124130

Cancel Allowance Amend Allowance Delete Allowance Close

This allows you to see more details of the allowance such as costing info and reference field.

**Reference** gets overwritten by CorePay as the allowance is processed but it can still be used to communicate additional information such as acting up grade and point.

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.

**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. 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 other wise 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.

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



**Note:** Refer to Quick Reference Guides as follows: **CH3: Change to Hours & 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.

### D. Making Corrections to Appointments

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

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click

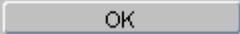


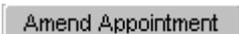
and open the relevant employee record. The *Personal Profile Maintenance (HR0120)* window opens.

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

3. From the *Appointment Details (PER746)* window click the  button to open the *View Appointment Details* screen.

<b>Post Details</b>	
Post No./Sequence	121158 3
Post Profile Type	1A
Post Effective Date	04-SEP-2012
Planned End Date	
ACADEMIC-RELATED/ACADEMIC	
Permanent	
No label found	
Status	Commenced Primary

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

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

<b>Post Details</b>	
Post Number	210565
Post Profile Type	1A
Effective Date	
Planned End Date	
BUSINESS ANALYST	
Permanent	
Target End Date	
Status	Commenced Primary

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

be displayed as follows. Click  to continue.



7. Update details as required, e.g. complete missing or incorrect data.

8. Ensure **Action** and **Reason code** are not updated.
9. Add to the **Comments** field to explain the change that has been made.
10. Click  to save the change.