

This work instruction was last updated: 24th March 2010

HRZ & Additional Increments Process

This Work Instruction describes how to move people into the HRZ or enter additional increments.

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

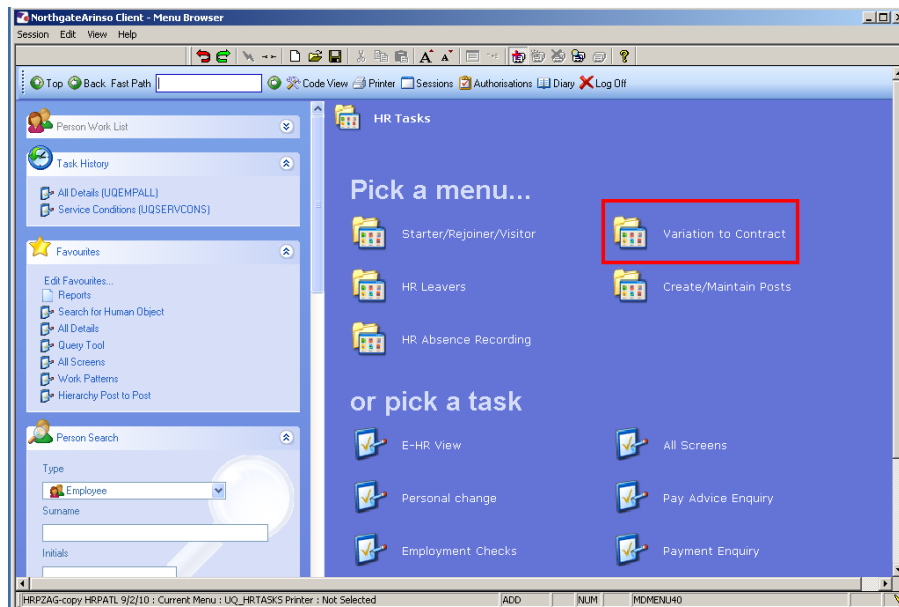
HR Tasks – Variation to Contract – HRZ/Additional Increments

- | | |
|---|--|
| 1 | Entering HRZ & Additional Increments |
| 2 | Current Post Holding data entry screen |
| 3 | Entering an Additional Increment |
| 4 | Moving into the HRZ |
| 5 | Fixed Pay Elements data entry screen. |
| 6 | Standard Letters |

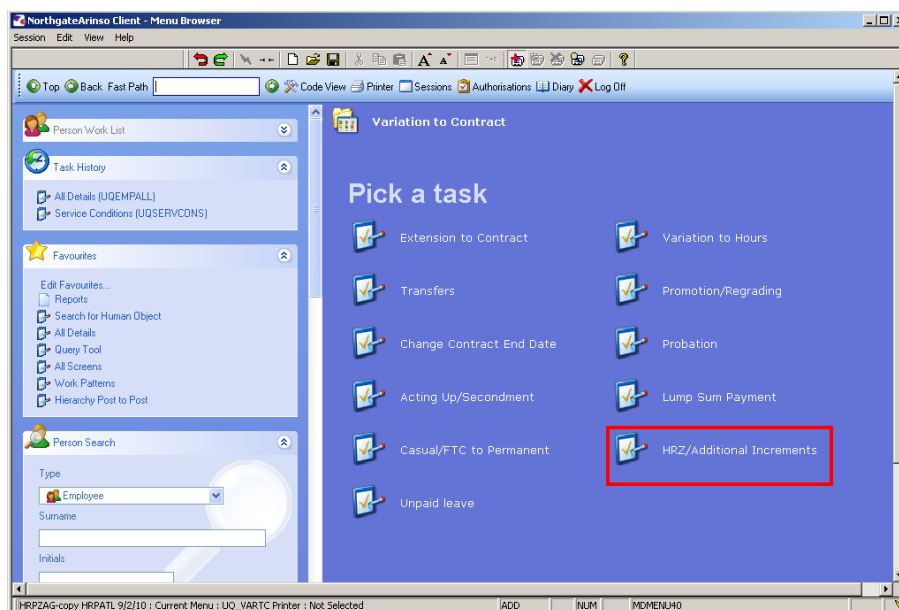
1 Entering HRZ & Additional Increments

1.1 Select HR Tasks

1.2 Variation to Contract



1.3 HRZ/Additional Increments



1.4 The following search form is made available

Task - HRZ/Additional Increments - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☐ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee ☐ As at Date 24/03/2010

Previous Surname

Known As

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

Select Exit Save List

Enter an Employee Number CHANGE NUM MD55S22

- 1.5 The Employee Number, Surname, search and select options are highlighted
- 1.6 Entering either the Employee Number or Surname select search.
- 1.7 Select the appropriate staff member from the list

2 Current Post Holding data entry screen

Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	14/02/2010	DD01003391		GRADE 1B	PS002	N	Y	
002	01/02/2010	AA01000001	Y	GRADE 3	PS002	N	Y	

❗ If the employee has more than 1 current post, ensure you are entering data on the correct post. Click on **Summary** of a post to check.

2.1 Window into the **Detail** field on the post that is to move into the HRZ or to receive an additional increment.

2.2 Click on the **Grade** tab.

MD47L3 Employee Post Holding Details

Detail

Post DD01003391 Clerical Assistant
 Job MSA1B&2 Manag, Spec and Admin 1B & 2
 Employee Grade
 Post Grade GRADE 1B Level 1b

General Conditions Misc Grade Contract

Pay Grade **GRADE 1B** Level 1b
 Source EMPPOST

Start Date 14/02/2010
 End Date

Point 5
 Point Amount 5092.66
 Point Rate 8.1390

T/S Template Perf Management User Fields Notes
 Salary Planning

Exit

2.3 Window into the **Pay Grade** field.

MD47G41 Employee Spinal Grade History

General

Post DD01003391 Clerical Assistant
 From 14/02/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade Source	Point	N
001	14/02/2010		GRADE 1B	SG001	POSTPL	POSTGD	5	N
	Point Rate	8.1390	Enh.Rate			Point Amount	5092.66	
	Override Date	01/08/2011		Override Reason	0R006			
	Override Step	1		Carry Forward	NO			
	Bar Point			Current Bar Point			6	

Add Change Delete Expand

Exit

2.4 Click on **Add**.

2.5 This will generate a new row.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade Source	Point N
001	14/02/2010		GRADE 1B	SG001	POSTPL	POSTGD	5 N
	Point Rate	8.1390	Enh. Rate		Point Amount		5092.66
	Override Date	01/08/2011	Override Reason		0R006		
	Override Step	1	Carry Forward		NO		
	Bar Point		Current Bar Point				6
002							
	Point Rate		Enh. Rate		Point Amount		
	Override Date		Override Reason				
	Override Step		Carry Forward				
	Bar Point		Current Bar Point				

Buttons: Add, Change, Delete, Expand, Exit

2.6 In the **Start Date** field enter the start date that the employee is to receive the Additional Increment of move into the HRZ.

2.7 Leave the **End Date** field blank and press **Enter**.

General

New Grade History record overlaps with current Open Grade History record.

This procedure will automatically update the end date of the existing open Grade History record.

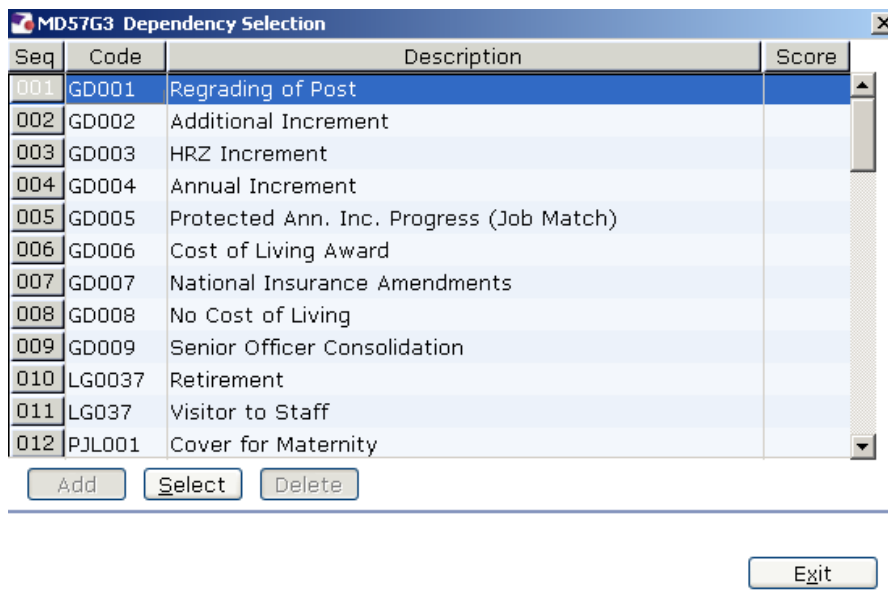
Confirm (Y or N)

2.8 Enter Y in the **Confirm** field.

2.9 Press **Enter**.

2.10 The **Grade** will default through from the post, press **Enter**.

2.11 Window into the **Reason** field.



Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	GD002	Additional Increment	
003	GD003	HRZ Increment	
004	GD004	Annual Increment	
005	GD005	Protected Ann. Inc. Progress (Job Match)	
006	GD006	Cost of Living Award	
007	GD007	National Insurance Amendments	
008	GD008	No Cost of Living	
009	GD009	Senior Officer Consolidation	
010	LG0037	Retirement	
011	LG037	Visitor to Staff	
012	PJL001	Cover for Maternity	

Buttons: Add, Select, Delete, Exit

- 2.12 Click on either **GD002** or **GD003**.
- 2.13 Press **Enter**.
- 2.14 If you are entering an Additional Increment follow Section 4
- 2.15 If you are entering an employee into the HRZ follow Section 5

3 Entering an Additional Increment

3.1 Window into the **Point** field.

Seq	Point	Value
001	3	14549.00
002	4	14879.00
003	5	15278.00
004	6	15689.00
005	7	16057.00
006	8	16505.00
007	9	16969.00
008	10	17460.00
009	11	17967.00
010	12	18486.00

Buttons: Add, Select, Delete, Exit

3.2 Click on the new point.

3.3 Press **Enter**.

3.4 This will update the **Point Amount**.

Seq	Start Date	End Date	Grade	Reason	Source	Point	N
001	14/02/2010		GRADE 1B	SG001	POSTPL POSTGD	5	N
002	01/04/2010		GRADE 1B	GD002	POSTPL POSTGD	6	N

Buttons: Add, Change, Delete, Expand, Exit

Enter the Override Date

3.5 Click in the **Override Date** field if the employee is to receive their annual increment on their service anniversary or a date that differs from 1 August.

Enter the date they are to receive their annual increment here. Otherwise leave blank.

- 🕒 Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

- 3.6 If an Override Date is entered, click in the **Override Reason** field and select a reason.

4 Moving into the HRZ

4.1 Window into the **Point** field.

Seq	Point	Value
001	3	14549.00
002	4	14879.00
003	5	15278.00
004	6	15689.00
005	7	16057.00
006	8	16505.00
007	9	16969.00
008	10	17460.00
009	11	17967.00
010	12	18486.00

Buttons: Add, Select, Delete, Exit

4.2 Click on their **existing point**.

4.3 Press **Enter**.

4.4 If the employee is to be entered on a point that is within the HRZ click in the **Bar Point** field.

002 01/04/2010 GRADE 1B GD003 POSTPL POSTGD 5 N

Point Rate 8.1390 Enh. Rate 8.1390 Point Amount 5092.66

Override Date Override Reason

Override Step Carry Forward

Bar Point Current Bar Point

Buttons: Add, Change, Delete, Expand, Exit

MD47L3 Employee Post Holding Details

MD47G47 Employee Grade Bar Point History

General

Post DD01003391 Clerical Assistant

Post Start 14/02/2010

Grade GRADE 1B Level 1b

Grade Start 14/02/2010

Point Start 01/04/2010 Point 5

Seq	Bar Point	Removed	Reason	N	Reason
001	6			N	
002	7			N	
003	8			N	
004	9			N	
005	10			N	
006	11			N	
007	12			N	

Add Change Delete

Exit

- 4.5 Click on the current bar point at the top of the table and click in the **Removed** field.
- 4.6 Enter the **date** that the bar point has been removed (same as **Start Date** in step 2.6) and press **ENTER** three times and Exit

MD47G47 Employee Grade Bar Point History

General

Post DD01003391 Clerical Assistant

Post Start 14/02/2010

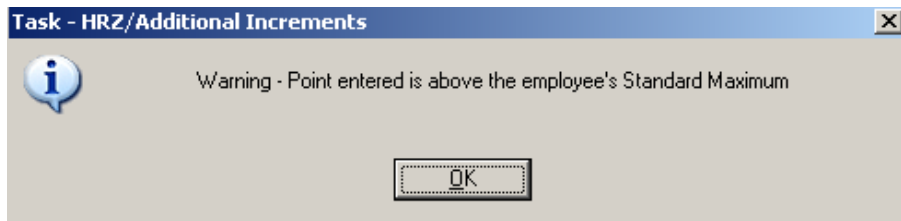
Grade GRADE 1B Level 1b

Grade Start 14/02/2010

Point Start 01/04/2010 Point 5

Seq	Bar Point	Removed	Reason	N	Reason
001	6	01/04/2010		N	
002	7	01/04/2010		N	
003	8			N	
004	9			N	
005	10			N	

- 4.7 Repeat this process for each bar point that is to be removed. The new Bar Point will be the next point without a **Removed** date.
- 4.8 Click on **Exit**.
- 4.9 Press **Enter** to update **Current Bar point**.
- 4.10 Window back into the Point field and click on the correct point within the HRZ.



- 4.11 Click on **OK**.
- 4.12 The **Point Amount** will adjust accordingly.
- 4.13 Click on **Exit**

☛ The **current** Point and Point Amount will be displayed until the date that the regarding comes into effect. There should now be an **End Date**.

- 4.14 Click on **Exit**.

- 4.15 Click on **Next**.



5 Fixed Pay Elements data entry screen.

Seq	Post	Code	Desc	E	Start	Period Amt	A	D	M	S
001	EMPLOYEE	0001	Tax Paid		01/02/2010	Calculated				N
002	EMPLOYEE	0040	NI C/O		01/02/2010	Calculated				N
003	DD01003391	1000	Basic Pay		01/04/2010	458.47				N
004	DD01003391	1000	Basic Pay	*	14/02/2010	424.39				N
005	AA01000001	1000	Basic Pay		01/02/2010	1178.29				N

Buttons: Add, Change, Delete, Expand

Currency

- ① A new row of **Basic Pay** should appear on the screen against the post that you have entered the Additional Increment or HRZ on with the Start Date that you had entered on Current Post Holding.
- ① The **Basic Pay** with the old **Period Amt** should have an * in the **E** column, this shows that there is an end date against that pay element.

5.1 This is the final screen in the HRZ/Additional Increment task

5.2 Click on **Save**.



6 Standard Letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	ADDINCR	001	Additional/Discretionary Increment	NOACT	1

Add Change Delete Expand

Exit

6.1 Click in the **Let Opts** field and click on the drop down

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

6.2 Click on **MERGE** Immediate print with manual changes

6.3 Click on **Exit**.

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/02/2010			
002	DD01003391	14/02/2010			
003	AA01000001	01/02/2010			Y
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

6.4 Select the post that you have entered the Additional Increment of HRZ on.

DRT533EW Complex Post Structure Selection

General

Select Post Structure Unit

Seq	Hierarchy	Eff Date
001	HR MAIN	01/09/2008
002	HR MAIN	01/08/2008
003	HR MAIN	01/04/2008
004	HR MAIN	14/01/2008
005	HR MAIN	01/01/1940
006	HRMAIN01	01/01/1940
007	HRMAIN02	14/01/2008
008	HRMAIN03	01/04/2008
009	HRMAIN04	01/08/2008

Add Select Delete

Exit

6.5 Select the latest Hierarchy

DRT150EW Personnel Codeburst

General

Select Person Codeburst

Seq	Hierarchy	Post Start Date
001	HRMAIN08	14/02/2010
002	HRMAIN09	14/02/2010

Add Select Delete

Exit

6.6 Select the latest Hierarchy

Seq	Grade	Start Date	End Date
001	GRADE 1B	14/02/2010	

Buttons: Add, Select, Delete, Exit

6.7 Select Grade

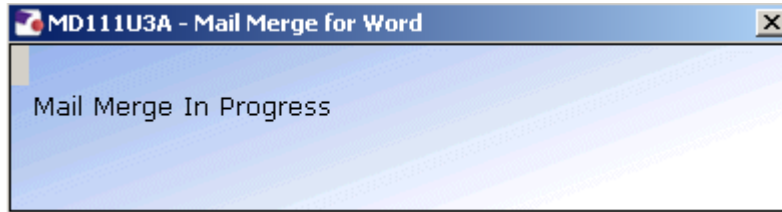
Seq	Pop Up Prompt
001	Enter 'additional' or 'discretionary'
002	Please enter the number of Increments
003	Enter whether this is a Sch/ Dept/Div
004	Please insert signatory's name
005	Please enter RA/PA's tel number

Buttons: Add, Change, Delete, Exit

- 6.8 Enter in the first row enter either the word **Additional** or **HRZ**.
- 6.9 In the second row enter the number of increments the employee has received.
- 6.10 In the third row enter the signatory's job title.
- 6.11 In the fourth row enter the signatory's name.

6.12 In the fifth row enter the signatory's telephone number.

6.13 Click on **Exit..**



6.14 The letter will produce in **Word** where you can update and print it.