This work instruction was last updated: 23rd March 2010

HR Lump Sum Payment Process

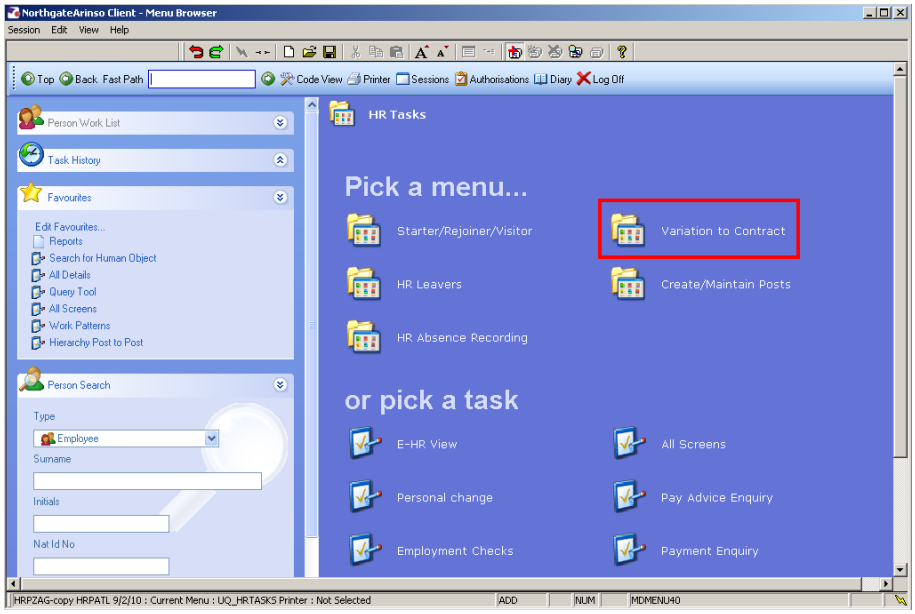
This Work Instruction describes the HR Lump Sum Payment Process for existing employees at the University who are to be given a lump sum payment.

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.

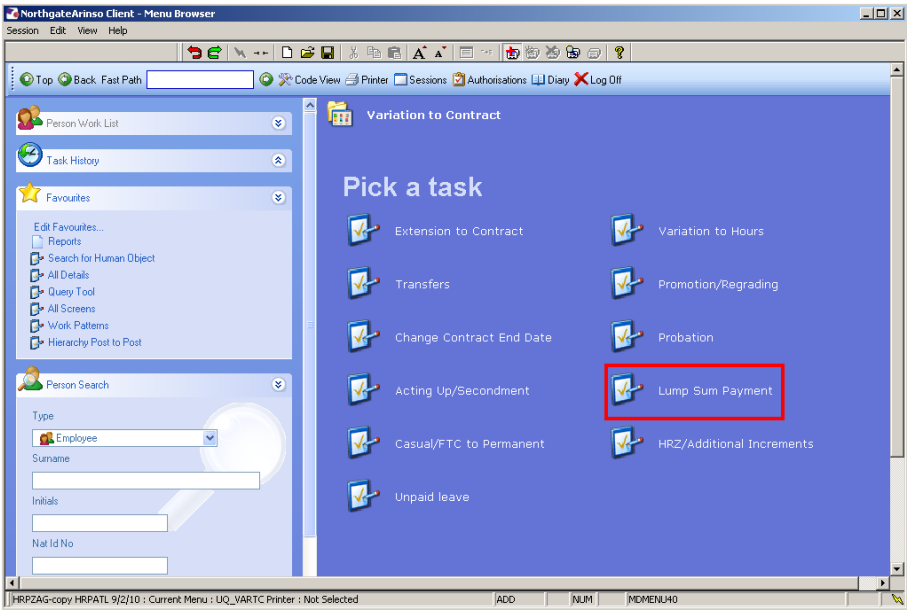
1	Starting the Lump Sum Payment Process
2	Personal Details data entry screen
3	Temporary Pay Elements data entry screen
4	Standard letters

1 Starting the Lump Sum Payment Process

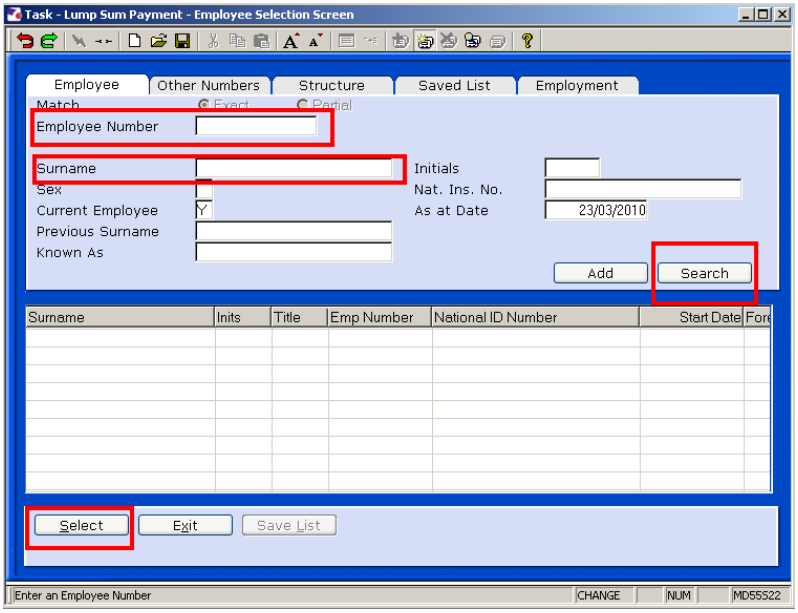
1.1 HR TASKS



1.2 Select Variation to Contract



1.3 Select Lump Sum Payment which gives the following Search Screen. The Employee Number, Surname, Search and Select options are highlighted.

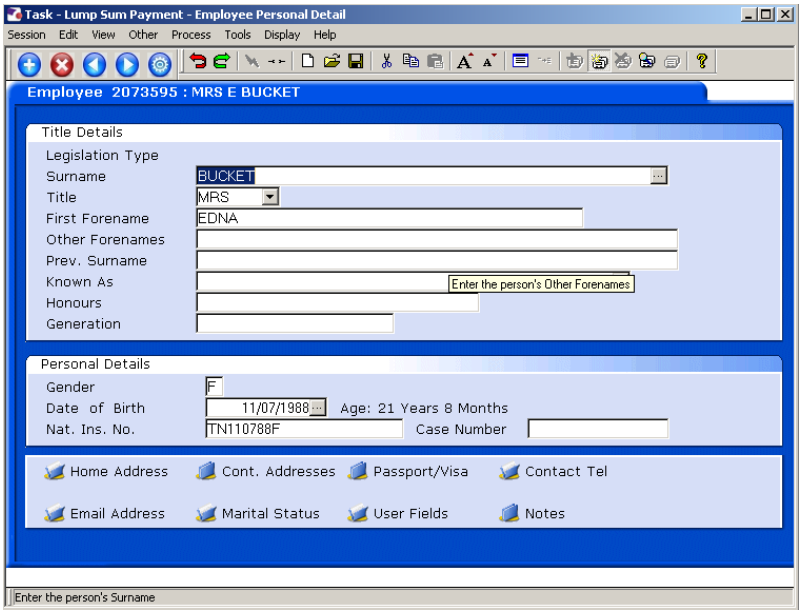


1.4 Enter either the Employee Number or surname and search

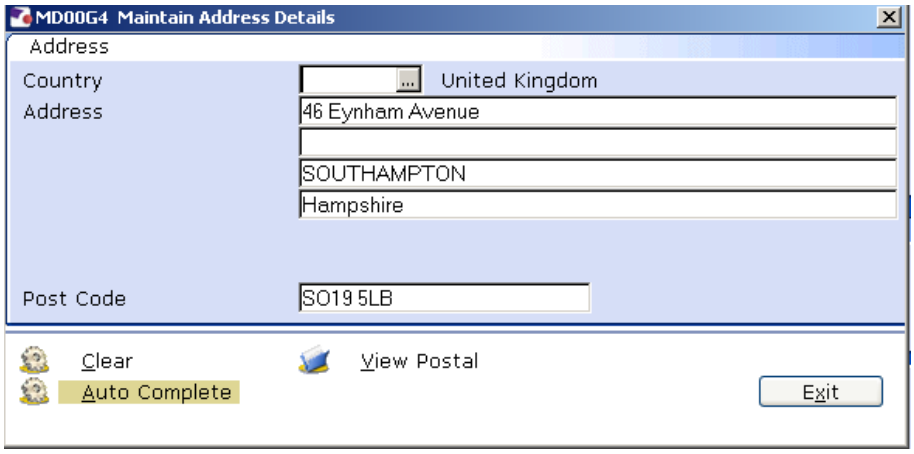
1.5 Select the appropriate Staff Member from the List

2 Personal Details data entry screen

As the person to whom a lump sum payment is being made is already an existing employee the **Personal Details** screen should already be completed. Check and update the information where necessary.



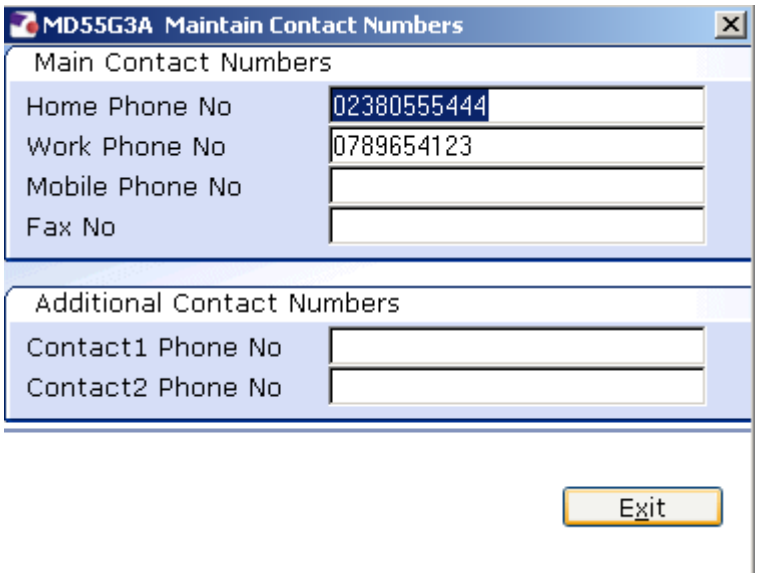
2.1 Click on **Home Address** to check and, where necessary, update the address details.



Click on **View Postal** to see how the address will be displayed on printed documentation.

2.2 Click **Exit**.

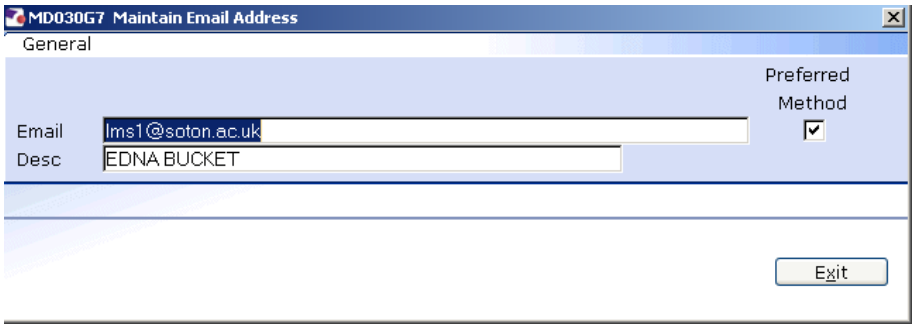
2.3 Click on **Contact Tel** to check and, where necessary, update the contact telephone details.



2.4 Enter all known details and click on **Exit**.

2.5 Click on **Email Address** check and, where necessary, update the email address details

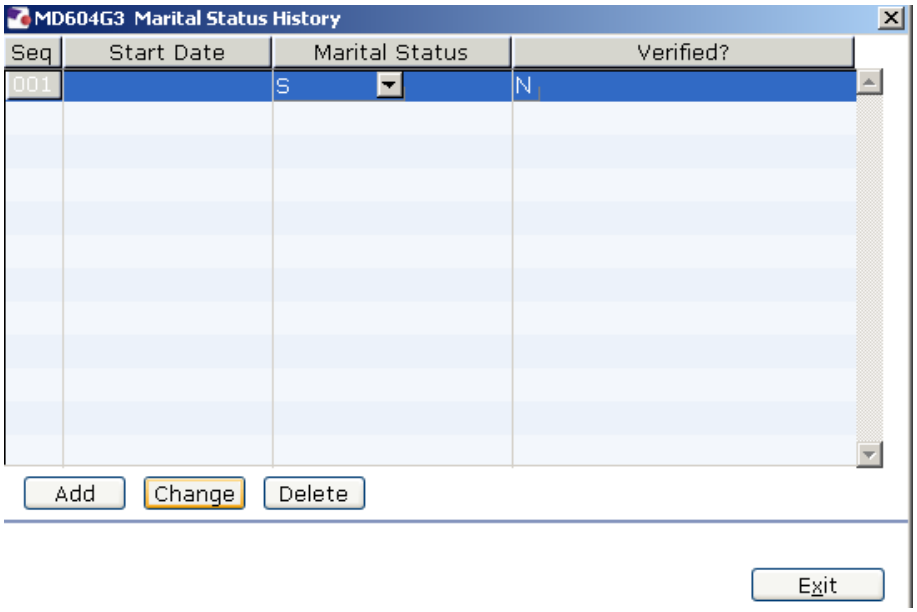
- The “Preferred Method” field should be ticked.



2.6 Click on **Exit**.

2.7 Click on **Marital Status** to check and where necessary update the relevant information.

2.8 If the status has changed you will have to click on **Add** to enter a new row of data.

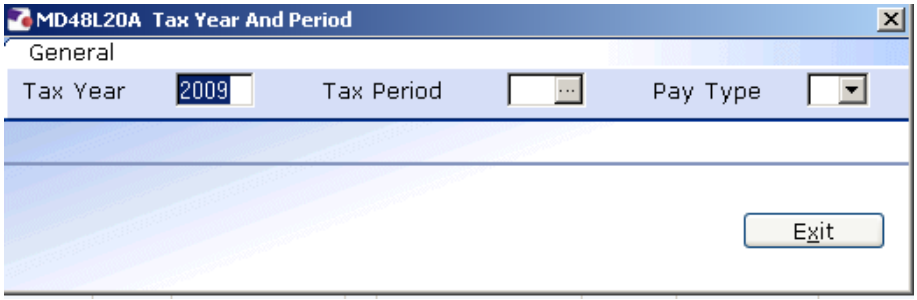


Enter the known Marital Status information and click **Exit**.

2.9 Click on to move to the next data entry screen.

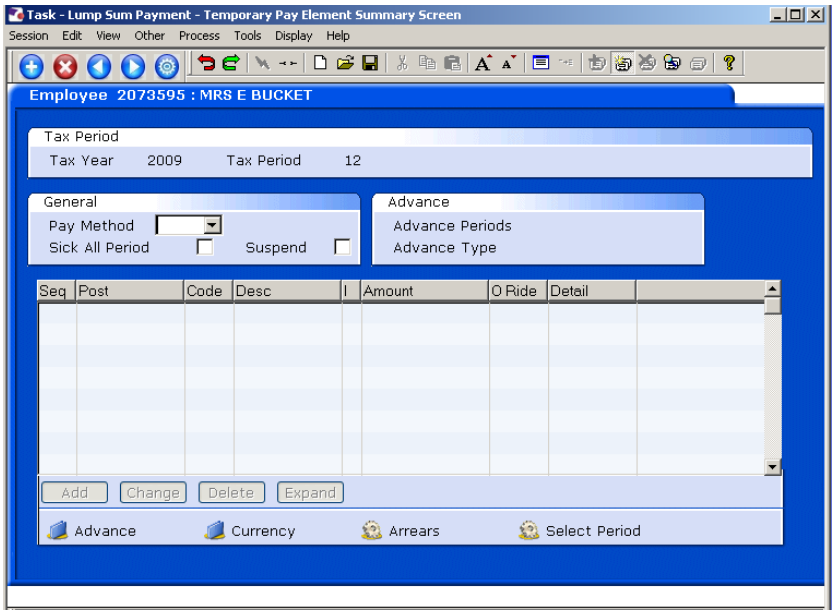
3 Temporary Pay Elements data entry screen

3.1 The following dialogue box will be displayed:



ENTER through the fields to complete the dialogue box.

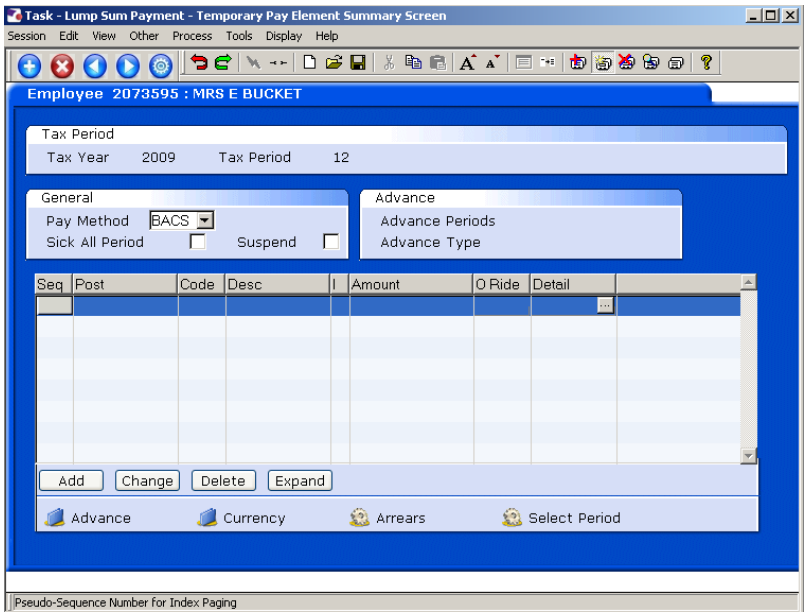
You will notice that the current month's **Tax Period** generates automatically (see below). If the employee's **Lump Sum Payment** is from a different period you will need to enter the relevant month's period number in the **Tax Period** field before entering through. i.e. **05**.



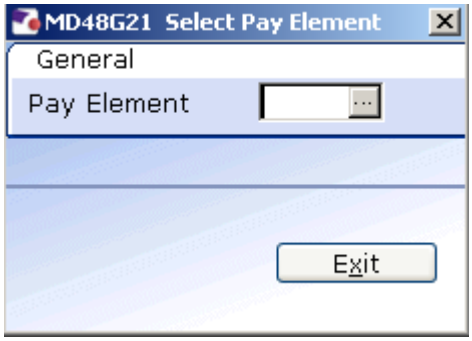
3.2 Select the **Pay Method** from the drop down list.

ⓘ This will normally be **BACS**.

3.3 **ENTER** through the **Sick All Period** and **Suspend** fields.

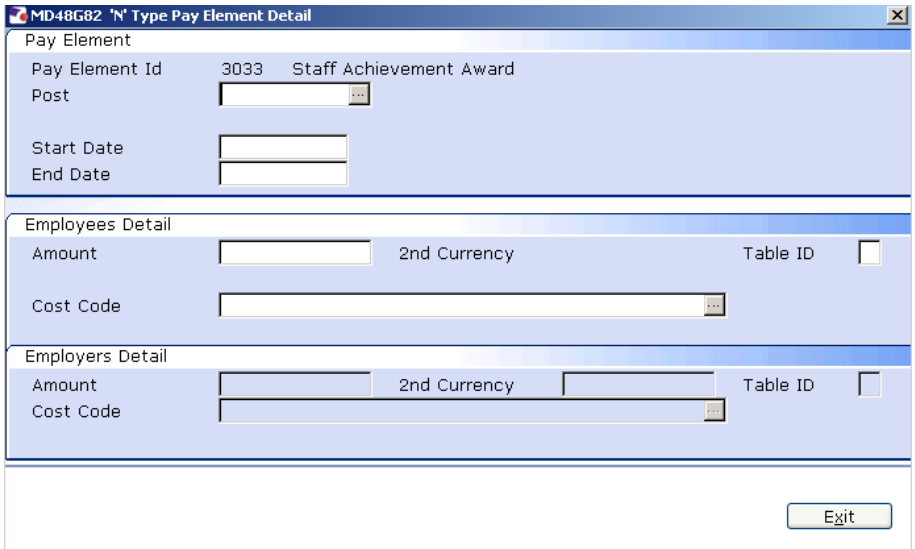


3.4 Click on **Add**.

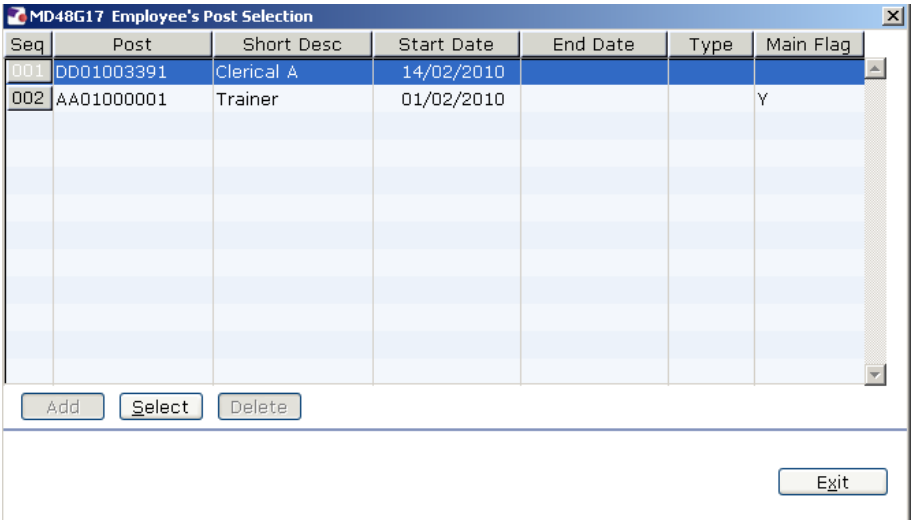


3.5 Type in the **Pay Element** code and press **ENTER**.

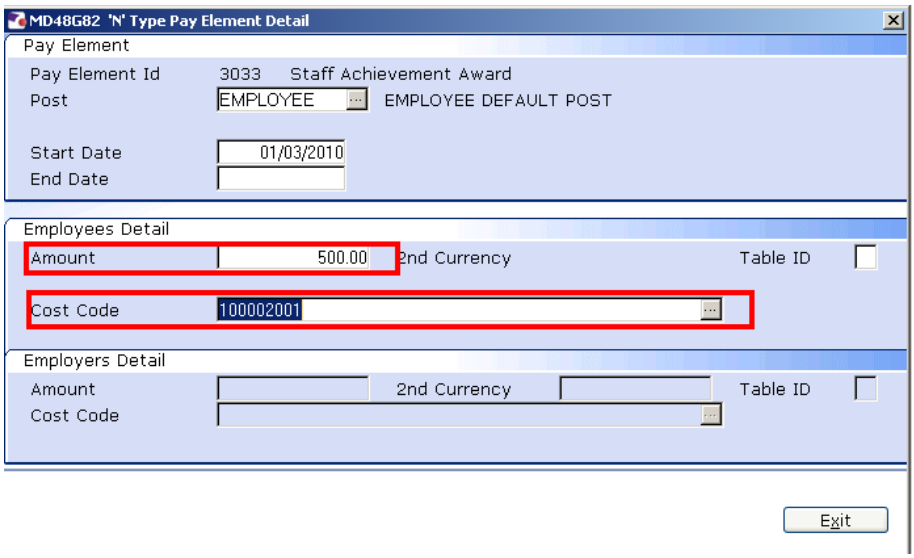
ⓘ The **Pay Element** code should be on the form received by HR.



3.6 **Window in** to the **Post** field.



3.7 Select the post to which the Lump Sum Payment refers.



3.8 Press **ENTER**.

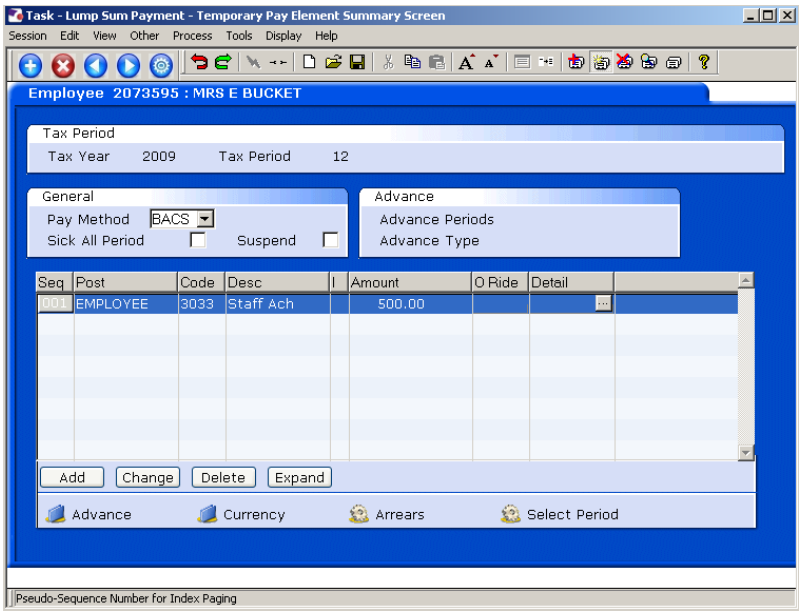
3.9 The Start Date of the period selected will generate automatically in the **Start Date** field. Press **ENTER.**

3.10 Enter the End Date of the monthly period selected in the **End Date** field. Press **ENTER**.

3.11 Type in the **Amount** and **ENTER** through to the **Cost Code** field.

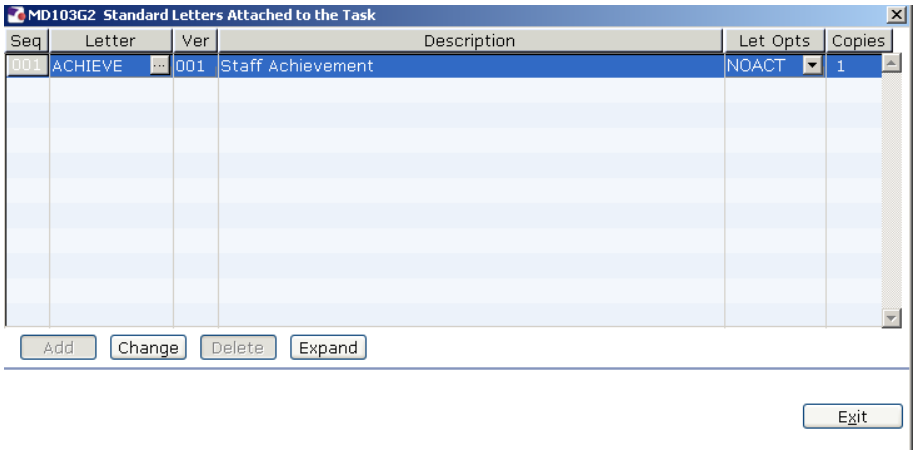
3.12 Type in the **Cost Code** and press **ENTER**.

ⓘ The **Cost Code** should be on the form received by HR.



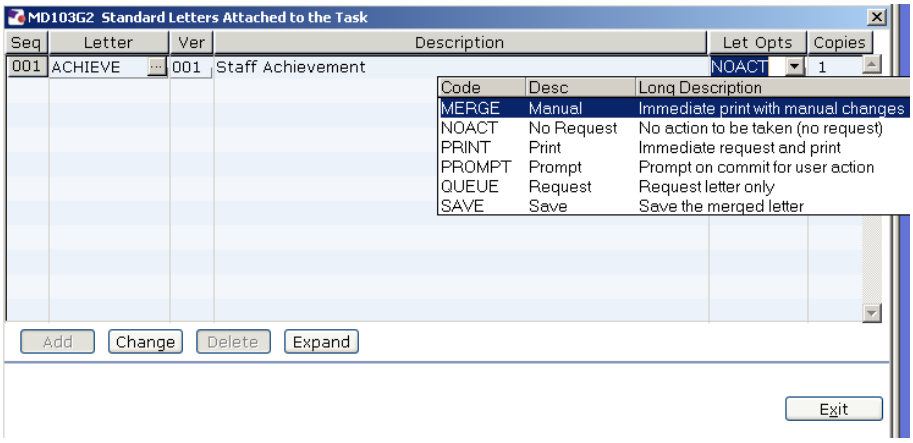
3.13 Click on SAVE to trigger the Letter

4 Standard letters

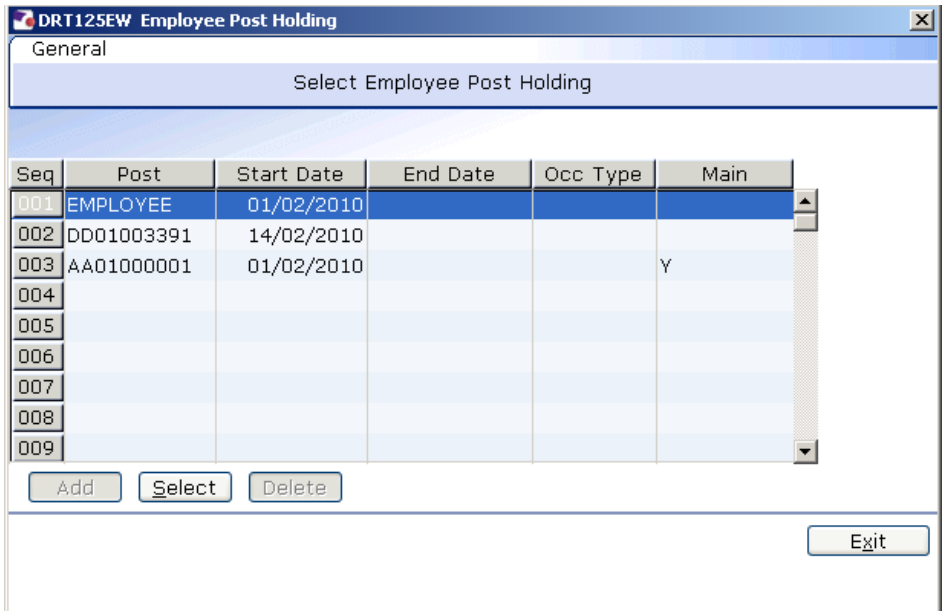


4.1 Click in the **Let Opts** field of the Staff Achievement letter.

4.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

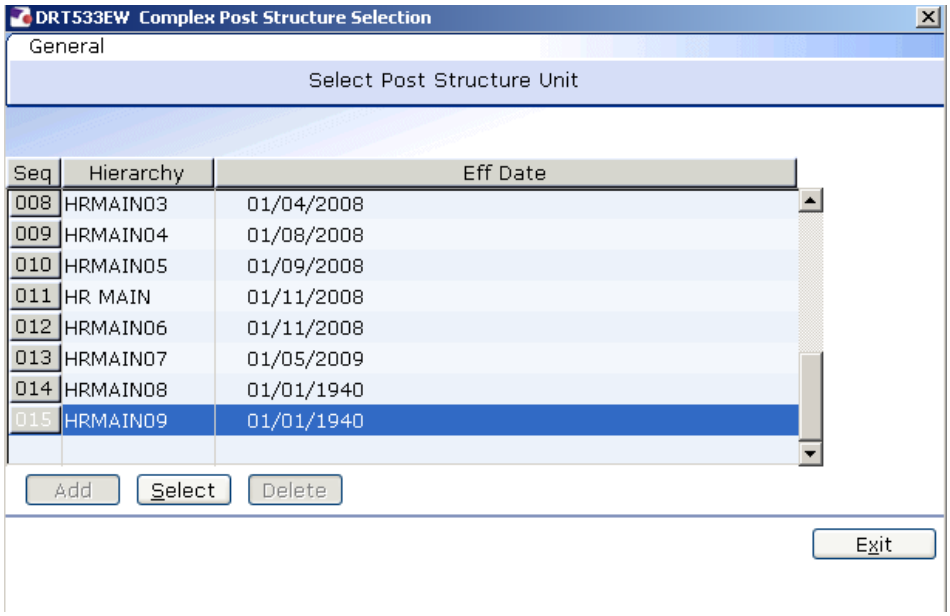


4.3 Click on **Exit.**

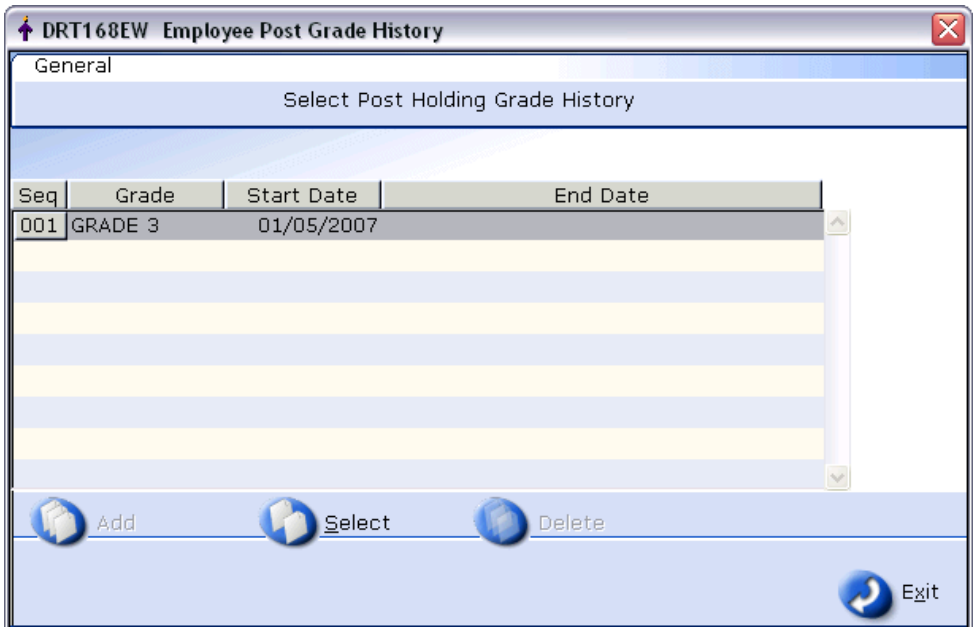


4.4 The screen will display all posts the employee is attached to. Click on the post to which this Lump Sum Payment relates.

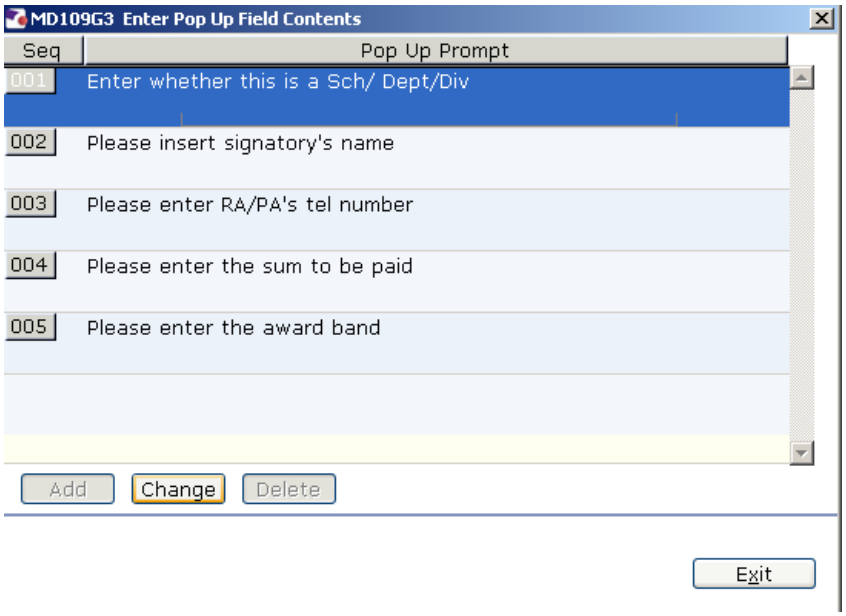
4.5 Click on **Select.**



4.6 Select the Latest Hierarchy and Click on **Select.**

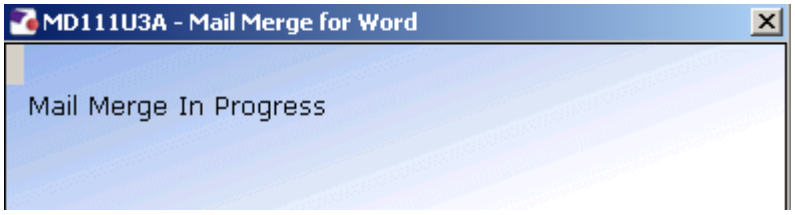


4.7 Click on **Select.**



4.8 Complete the required Pop Up field contents.

4.9 Click **Exit**.



4.10 The Staff Achievement letter should generate in **Word. Three copies** of the contract will be sent to Word in the one document. You can make manual changes and print as normal.