

This work instruction was last updated: 23<sup>rd</sup> March 2010

## HR Lump Sum Payment Process

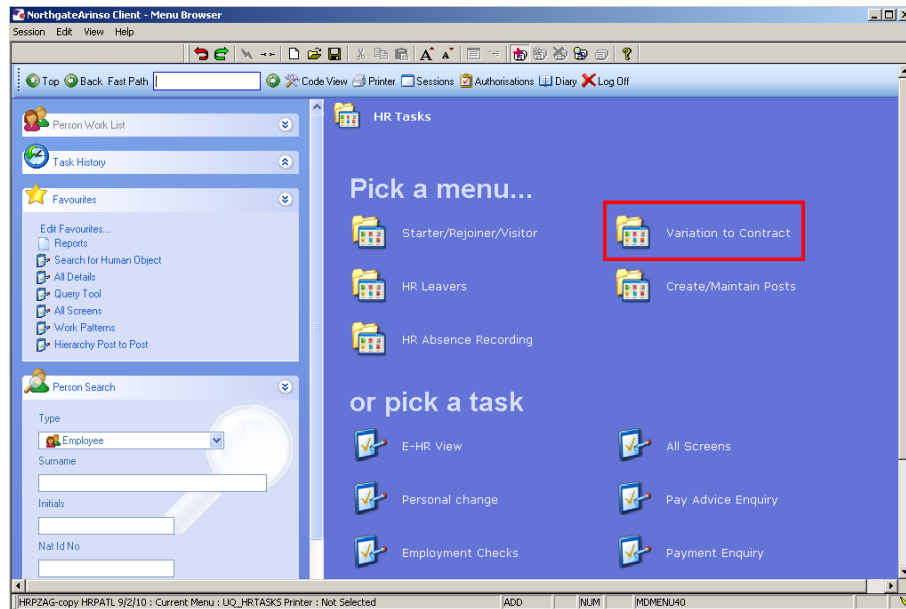
This Work Instruction describes the HR Lump Sum Payment Process for existing employees at the University who are to be given a lump sum payment.

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.

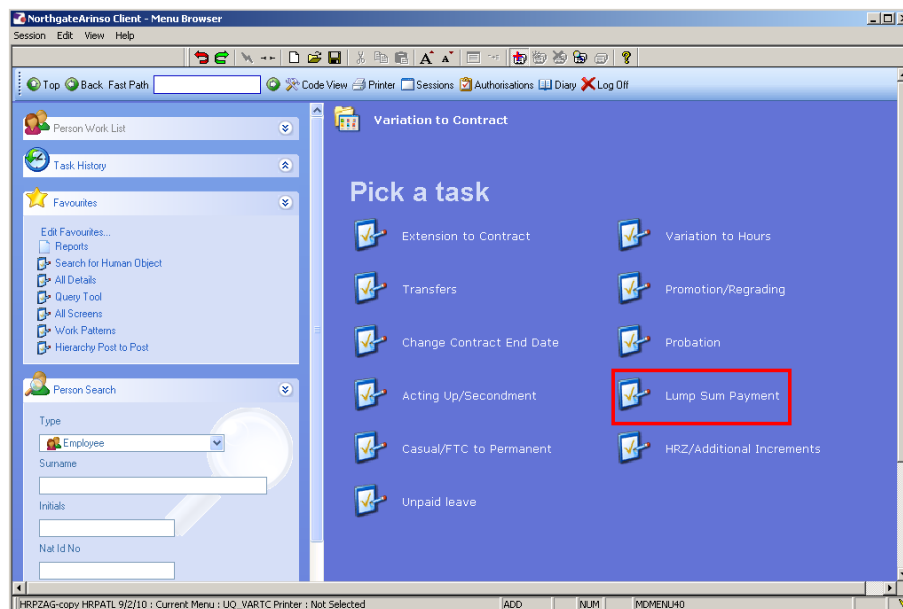
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|---|--|
| 1 | Starting the Lump Sum Payment Process    |
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# 1 Starting the Lump Sum Payment Process

## 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.

Task - Lump Sum Payment - 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

Previous Surname

Known As

Add Search


Surname	Inits	Title	Emp Number	National ID Number	Start Date	For

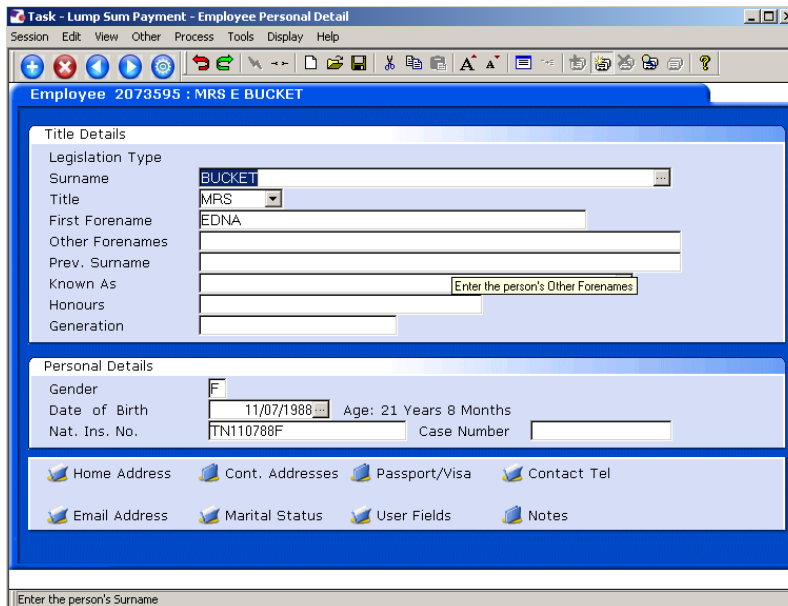
Select Exit Save List

Enter an Employee Number CHANGE NUM MD55522

- 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.



Task - Lump Sum Payment - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee 2073595 : MRS E BUCKET

Title Details

Legislation Type

Surname BUCKET

Title MRS

First Forename EDNA

Other Forenames

Prev. Surname

Known As Enter the person's Other Forenames

Honours

Generation

Personal Details

Gender F

Date of Birth 11/07/1988 Age: 21 Years 8 Months

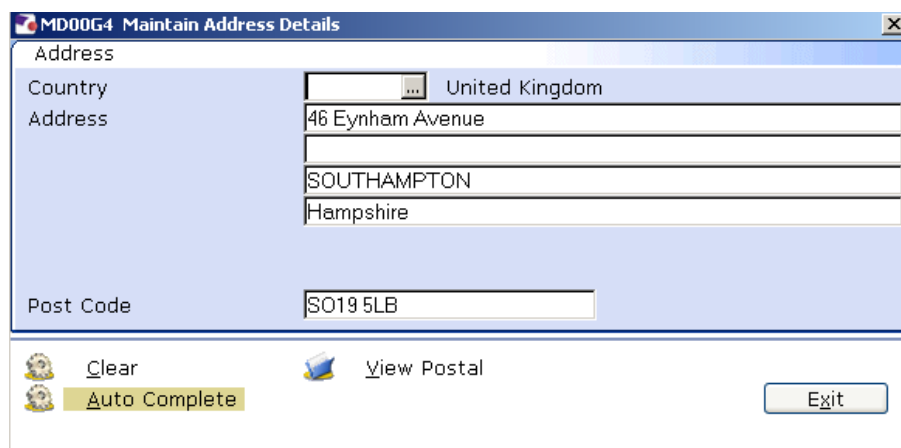
Nat. Ins. No. TN110788F Case Number

Home Address Cont. Addresses Passport/Visa Contact Tel

Email Address Marital Status User Fields Notes

Enter the person's Surname

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



MD00G4 Maintain Address Details

Address

Country United Kingdom


Address 46 Eynham Avenue

SOUTHAMPTON

Hampshire

Post Code SO19 5LB

Clear Auto Complete View Postal Exit

-  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.

MD55G3A Maintain Contact Numbers

Main Contact Numbers

Home Phone No 02380555444

Work Phone No 0789654123

Mobile Phone No

Fax No

Additional Contact Numbers

Contact1 Phone No

Contact2 Phone No

Exit

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.

MD030G7 Maintain Email Address

General

Email lms1@soton.ac.uk

Desc EDNA BUCKET

Preferred Method ☒

Exit

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.


MD604G3 Marital Status History

Seq	Start Date	Marital Status	Verified?
001		S	N

Add Change Delete

Exit

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.




MD48G21 Select Pay Element

General

Pay Element

Exit

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

MD48G82 'N' Type Pay Element Detail			
<b>Pay Element</b>			
Pay Element Id	3033	Staff Achievement Award	
Post	<input type="text"/>		
Start Date	<input type="text"/>		
End Date	<input type="text"/>		
<b>Employees Detail</b>			
Amount	<input type="text"/>	2nd Currency	Table ID <input type="checkbox"/>
Cost Code	<input type="text"/>		
<b>Employers Detail</b>			
Amount	<input type="text"/>	2nd Currency	Table ID <input type="checkbox"/>
Cost Code	<input type="text"/>		

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

Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD01003391	Clerical A	14/02/2010			
002	AA01000001	Trainer	01/02/2010			Y

Buttons: Add, Select, Delete, Exit

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

Pay Element

Pay Element Id: 3033 Staff Achievement Award

Post: EMPLOYEE EMPLOYEE DEFAULT POST

Start Date: 01/03/2010

End Date:

Employees Detail

Amount: 500.00 2nd Currency: Table ID: ☐

Cost Code: 100002001

Employers Detail

Amount: 2nd Currency: Table ID: ☐

Cost Code:

Buttons: Exit

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.

Task - Lump Sum Payment - Temporary Pay Element Summary Screen

Session Edit View Other Process Tools Display Help

Employee 2073595 : MRS E BUCKET

Tax Period  
Tax Year 2009 Tax Period 12

General  
Pay Method BACS  
Sick All Period ☐ Suspend ☐

Advance  
Advance Periods  
Advance Type

Seq	Post	Code	Desc	I	Amount	O Ride	Detail
1	EMPLOYEE	3033	Staff Ach		500.00		

Add Change Delete Expand

Advance Currency Arrears Select Period

Pseudo-Sequence Number for Index Paging

3.13 Click on SAVE  to trigger the Letter

## 4 Standard letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	ACHIEVE	001	Staff Achievement	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

- 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**.

Seq	Letter	Ver	Description	Let Opts	Copies
001	ACHIEVE	001	Staff Achievement	NOACT	1

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

Buttons: Add, Change, Delete, Expand, Exit

- 4.3 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					

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**.

Seq	Hierarchy	Eff Date
008	HRMAIN03	01/04/2008
009	HRMAIN04	01/08/2008
010	HRMAIN05	01/09/2008
011	HR MAIN	01/11/2008
012	HRMAIN06	01/11/2008
013	HRMAIN07	01/05/2009
014	HRMAIN08	01/01/1940
015	HRMAIN09	01/01/1940

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

Seq	Grade	Start Date	End Date
001	GRADE 3	01/05/2007	

Buttons: Add, Select, Delete, Exit

4.7 Click on **Select**.

Seq	Pop Up Prompt
001	Enter whether this is a Sch/ Dept/Div
002	Please insert signatory's name
003	Please enter RA/PA's tel number
004	Please enter the sum to be paid
005	Please enter the award band

Buttons: Add, Change, Delete, Exit

4.8 Complete the required Pop Up field contents.

4.9 Click **Exit**.

Mail Merge In Progress

- 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.