



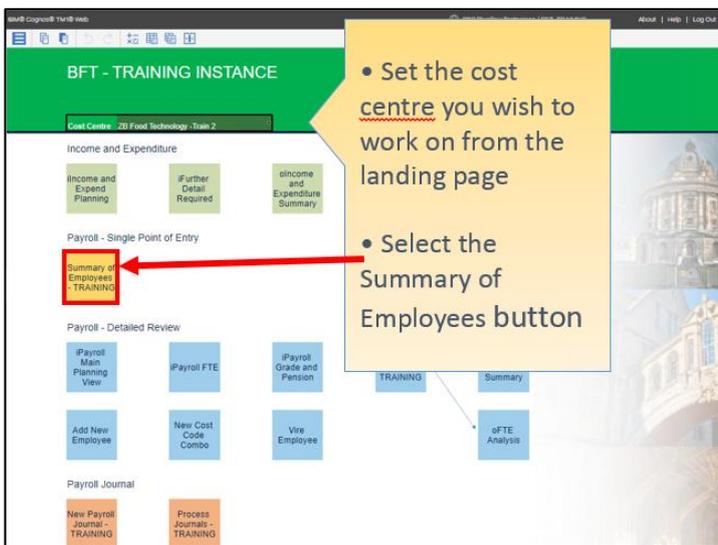
2.4 How to...Review Payroll – Step 4 Change Grade + Stage and Pension

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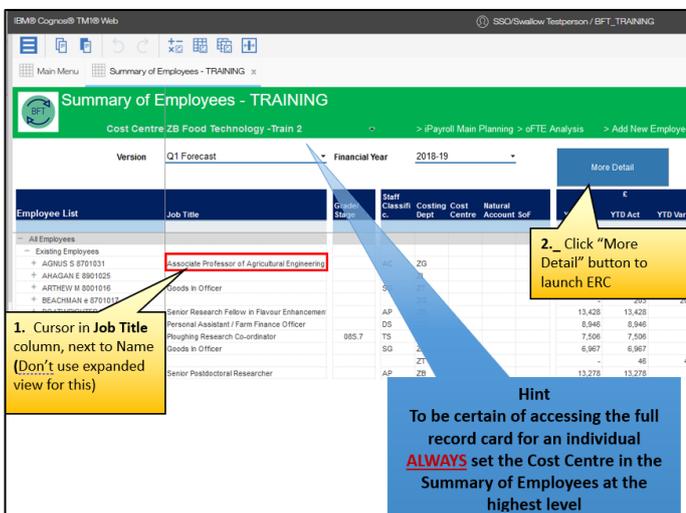
1. Open Summary of Employees

Click on the yellow “Summary of Employees” button on the BFT Landing Page



2. Launch Employee Record Card

- In the Summary of Employees, place the cursor in the Job Title column, next to the Employee name
- Click the blue More Details button ...



...to open the Employee Record Card for the employee concerned.

The screenshot shows the 'Individual Employee Record Card - TRAINING' for employee BONEBRAKER F. 8201037. Key sections include:

- Employee Summary:** A table showing monthly data for FTE Plan, Clerk, Cook, and FTE Plan from August to July.
- Grade and Stage:** A table with columns for Ad, Plan, and various salary components (Additional Salary) across months. Yellow cells indicate areas for input.
- Pension:** A table showing pension details for Ad and Plan across months.
- Payroll Cost:** A table showing total payroll costs for Salary, Pension, and other components.

3. Review Grade and Stage + Pension

Scroll down the ERC. Grade and Stage details are below the “Employee Summary” area, with Pension schemes in the rows underneath.

This close-up highlights the 'Grade and Stage' and 'Pension' sections. A red box encloses the data rows. A yellow callout box contains the following text:

- **Grade, Stage and Pension** can be entered / amended here
- Yellow cells to make changes

Hint

- Beware **Salary** vs **Additional Salary**! FTE and Grade/Stage must both be against the same heading, or costs won't calculate!

4. Amend ERC as required

In the example below, costs double because of a grade anomaly in the December of the forecast.

Individual Employee Record Card - TRAINING

Cost Centre: ZB Food Technology -Train 2
Employee: BONEBRAKER F 8201037

Name: BONEBRAKER F
Job title: Personal Assistant / Farm Finance Officer
College: DEFAULT/NOT APPLICABLE
Costing Dept: ZB
Staff Classific.: DS
SoF: 00000

FTE Budget: 0.0
FTE Actual: 1.0
FTE Plan: 0.0
Salary: 29,057
Payroll Cost: 37,201
Post No.:

Employee Summary		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
BONEBRAKER F 8201037	FTE Plan	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	-	-	-	-
	Costs	2,982	2,982	2,982	3,142	6,278	6,278	6,278	6,278	-	-	-	-
8201037-ZB0001-50200-A2007	FTE Plan	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	-	-	-	-
	Costs	1,491	1,491	1,491	1,571	3,139	3,139	3,139	3,139	-	-	-	-
8201037-ZB9999-50200-00000	FTE Plan	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	-	-	-	-
	Costs	1,491	1,491	1,491	1,571	3,139	3,139	3,139	3,139	-	-	-	-
8201037-ZB0002-50220-00000	FTE Plan	-	-	-	-	-	-	-	-	-	-	-	-
	Costs	-	-	-	-	-	-	-	-	-	-	-	-

Grade and Stage

Adj	Salary	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Plan	Salary												
Adj	Additional Salary					365.8							
Plan	Additional Salary	05S.6	05S.6	05S.6	05S.6	365.8	36S.8						

Pension

Adj	Salary	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Plan	Salary	OSPS											

...Amend Grade and Stage...

To amend Grade and Stage, click on the dropdown "handle" for the month where the change takes place in the Salary or Additional Salary "Adj" row...

Grade and Stage

Adj	Salary	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Plan	Salary												
Adj	Additional Salary					365.8							
Plan	Additional Salary	05S.6	05S.6	05S.6	05S.6	365.8	36S.8						

Pension

...this opens a dropdown menu of available Grade and Stage points.

Grade and Stage

Adj	Salary	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Plan	Salary												
Adj	Additional Salary					365.8							
Plan	Additional Salary	05S.6	05S.6	05S.6	05S.6	365.8	36S.8						

Pension

...and as long as there's an FTE, selecting a "standard" Grade/Stage* will create salary costs in BFT Payroll at the relevant point.

...Amend Pension scheme...

To amend Pension scheme it's very similar, except there's no "Additional Salary" row: clicking on the yellow "Adj" cell, in the Pension/Salary row...

Pension							
Adj	Salary						
Plan	Salary	OSPS	OSPS	OSPS	OSPS	OSPS	OSPS

...opens a dropdown menu of Pension schemes (see below).

MFC
NHS
None
OSPS
SAUL
USS
USS Opt Out

Selecting a scheme from the list triggers Employer's Pension contributions in Payroll at the rate set for the scheme.

*Non-Standard Grade and stage

The Grade and Stage list includes non-Standard points as well, which are those with a stage number ".9999". Non Standard grades will have individually negotiated salary amounts, so there's no £ cost associated with their grade points on BFT. So, to amend costs for an employee with a non-standard grade:

- Go to the yellow "Select split ID" box on the ERC and select the relevant cost code combination

Select Split ID 8201012-ZB9999-50110-00000

FTE		Aug	Sep
Adj	Salary	0.00	0.00
Plan	Salary	0.20	0.20
Adj	Additional Salary	0.00	0.00
Plan	Additional Salary	0.00	0.00

- In the "Other" area at the foot of the ERC activate the row by selecting "Manual" in the Profile column against "Other Rec Pension". Click F9 or save data changes...

Other	Profile	Aug	Sep	Oct	Nov
Other Rec. Pension					
Other Rec. Non-Pension					
Other Non Rec. Pension					
Other Non Rec. Non-Pension	Manual				
Prof Distinction					
Provision Rec.	Equal				
Provision Non Rec.					
Payroll Journal	Term Time Only				
	Summer Only				

...and enter your amendment to the monthly gross pay amount in the yellow cells for each month (pension and NI costs are calculated automatically from the gross pay). Click F9 or save data changes to save your amendment.

Other	Profile	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Total Year
Other Rec. Pension					200	200	200	200	200	200	200	200	200	-
Other Rec. Non-Pension														-
Other Non Rec. Pension														-
Other Non Rec. Non-Pension														-
Prof Distinction														-
Provision Rec.														-
Provision Non Rec.														-
Payroll Journal														-