



## **Case Study 23: How to enter a new payroll cost code or projection for an employee that is “owned” by another department**

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### **Background**

The Grade salary scales for the University are part of the standing data detail sitting behind the Payroll Application in the BFT. The planner specifies the grade and point, the BFT projection refers back to the relevant scale and the appropriate salary value is returned. Planning assumptions about progression up the scales and projected Cost of Living Awards are also built in, and do not have to be altered by the individual planner.

However the security applied to the system restricts the ability to change grade to the “owning” department. Counter intuitively this may not necessarily be the department where the employee has the majority of the FTE, but instead is hard wired to the department referred to in the last line of the HRCore report for the most recent month, which could be another Division altogether.

Points about an employee “owned” by another department.

- Actual pay costs will be imported from HRCore, as for all actual permanent pay costs
- The ownership issue applies to desired changes within the “other employee details” tab, which affects promotional changes of grade and therefore salary. FTEs and entries on other payroll elements are not affected
- The departmental owner will be the same for Salary and Additional Salary
- It may be quite hard for the individual planner to find out who “owns” the employee, the first symptom is merely that the employee does **not** appear the in the departmental list the planner is working with. A different job title (such as proctor) may provide a pointer.
- If the ownership is within the Division the Champions in the Divisional finance teams will be able to see the other elements and potentially make the desired alteration, but this issue may cross Divisions

### **Suggested planning solution**

Although, as noted above, one action would be to request the “owner” to make the change the planner wants, the recommended planning solution is instead to put a £ value projection in the forecast months as a Misc payment in order the reflect the increase (or decrease) in planning cost. Therefore follow the steps below.



1. Untick the zero suppression, revealing all pay elements.
2. Pick MISC PAYMENT PENS on the relevant cost code combination on Gross salary

1284164-BW9999-50100-00000	<input type="checkbox"/> <b>Total of Pay Element</b>	0	0
	<input type="checkbox"/> <b>Recurrent</b>	0	0
	ADDITIONAL SALARY	0	0
	CLINICAL EXCELLENCE AWARD	0	0
	EMPLOYERS NI AND APPRENTICESHIP LEVY	0	0
	EMPLOYERS PENSION	0	0
	MISC PAYMENT NON PENS	0	0
	MISC PAYMENT PENS	0	0
	PROF DISTINCTION	0	0
	Provision Recurrent	0	0
	SALARY	0	0
	SCHEDULE ALLOWANCE NON PENS	0	0
	SCHEDULE ALLOWANCE PENS	0	0
	SMP OFFSET	0	0
	<input type="checkbox"/> <b>Non Recurrent</b>	0	0

3. Click on the down arrow by the “Payroll Cost” box and select Gross pay. This will open up yellow input as long as the other conditions have been met—cost centre not roll-up level, cost combination not total employee etc. Refer to *Case Study 1 How to ensure yellow input cells are available in payroll planning* if there are any problems



