



Case Study 27: How to use the Pension and Grade tab

By Diana Boxall

Grade and Pension	Shows: Grade and scale points across actuals (read only) and planned months . Pension details can be accessed from here, although not visible in the default view	Purpose: Shows Grade and Point on scale. Automatic progression within the scale bar banding, so amend only by exception
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This tab (or “view”) allows the planner to review grades and if necessary to manually amend then month by month. The standing data information in the model will take account of automatic annual increments (stopping at the relevant scale bar), so it will only be necessary to make changes for progressions which fall outside this. This does mean that staff on clinical grades where progression dates vary according to recruitment and other criteria will have to be amended manually. As with completely non standards grades the Cost of Living award % will be applied but no incremental progression.

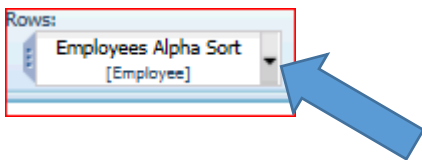
In the example below not that automatic progression from 08S.5 to 08S.6 in October and then promotion to the 09S grade manually applied in February.

		Year TOTAL	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Next Grade and Stage									09S.3					
Plan Grade and Stage									09S.3					
FINAL Grade and Stage			08S.5	08S.5	08S.6	08S.6	08S.6	08S.6	09S.3	09S.3	09S.3	09S.3	09S.3	09S.3
Salary		3,983	3,647	3,647	3,756	3,756	3,756	3,756	3,983	3,983	3,983	3,983	3,983	3,983
Next Grade and Stage														

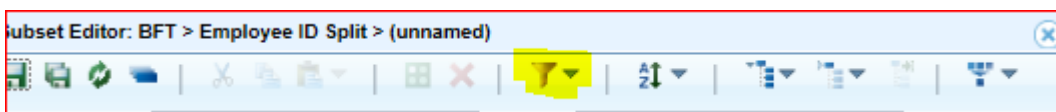
When they enter this screen the planner will be able to view all employees within the scope of his or her security.

The number of employees visible can be reduced to a single department by using the subset editor on the employees’ box and filtering by attribute (as opposed to label or expression).

Click down on the employees’ box



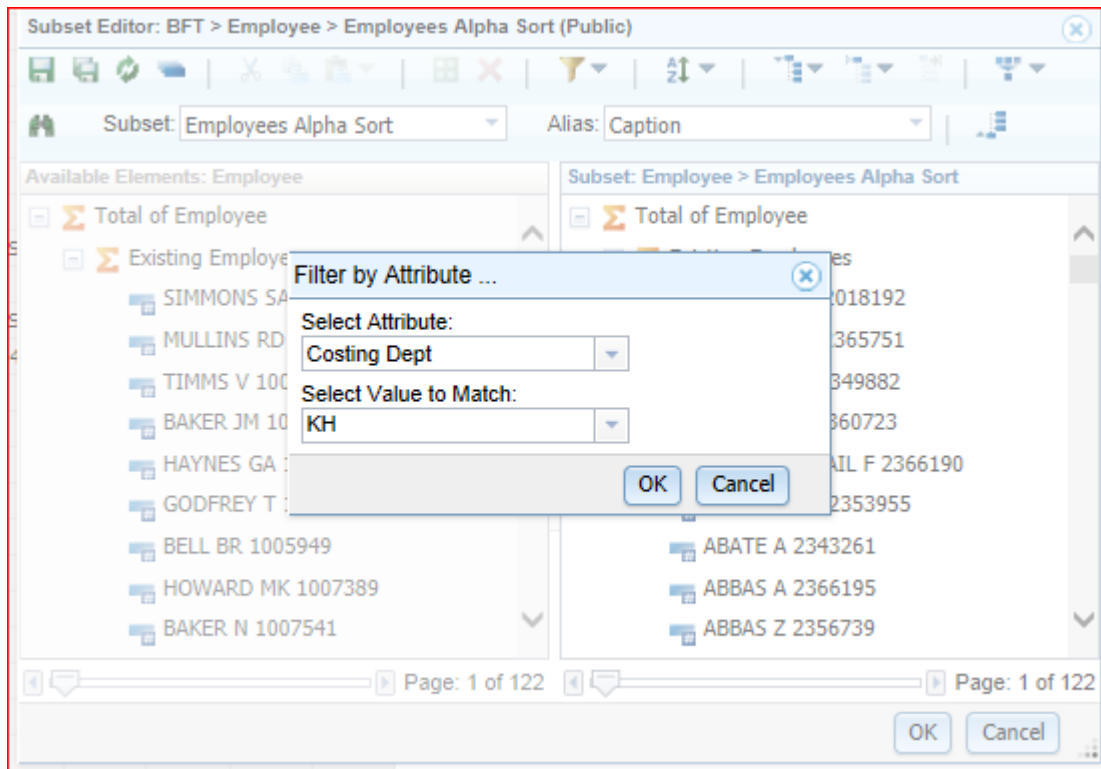
The select the filter icon



And filter by “Attribute”.



The box in the screen shot shown below will then open up. Select Costing department from the drop down list. And then further select the two character department identifiers.



A note on ownership

Before input can be made in this screen it is necessary to take ownership. However, it is best to take ownership at the main payroll planning screen and then move to the Grade and Pension tab. This is because the Grade and pension tab automatically positions at the top of your security clearance, so taking ownership within the tab may mean you conflict with other users in your area. This is regardless of whether the employees visible have been limited by a subset as described above.

Therefore, **take ownership at a more limited level within the main planning screen** before switching moving to the Grade and Pension tab, the yellow for input will automatically be open for you to work, but with the risk of ownership clashes reduced.

Always check that you are altering the exact employee id required, since you may have access to several very similar looking employee names and once yellow is revealed it will be open for all employees within the planner's security scope.

Although the tab is correctly called Grade and Pension, the pension fields are not open to view in the default presentation. This is because the pension will not need to be frequently altered and if visible it tends to cause wide columns which makes the screen less user friendly.

It is fairly simple to reveal the pension scheme however, Case study 9 also describes this step.



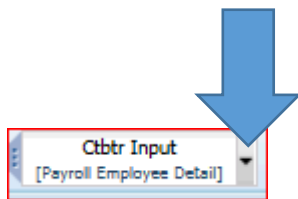
The employer's pension contribution will be calculated for each employee based on

- a) The pension scheme membership as drawn from the HRCore report (or as identified by the planner for NewPerson)
- b) The percentage rate of contribution for that particular scheme as picked up from the underlying standard data visible to the model administrators.

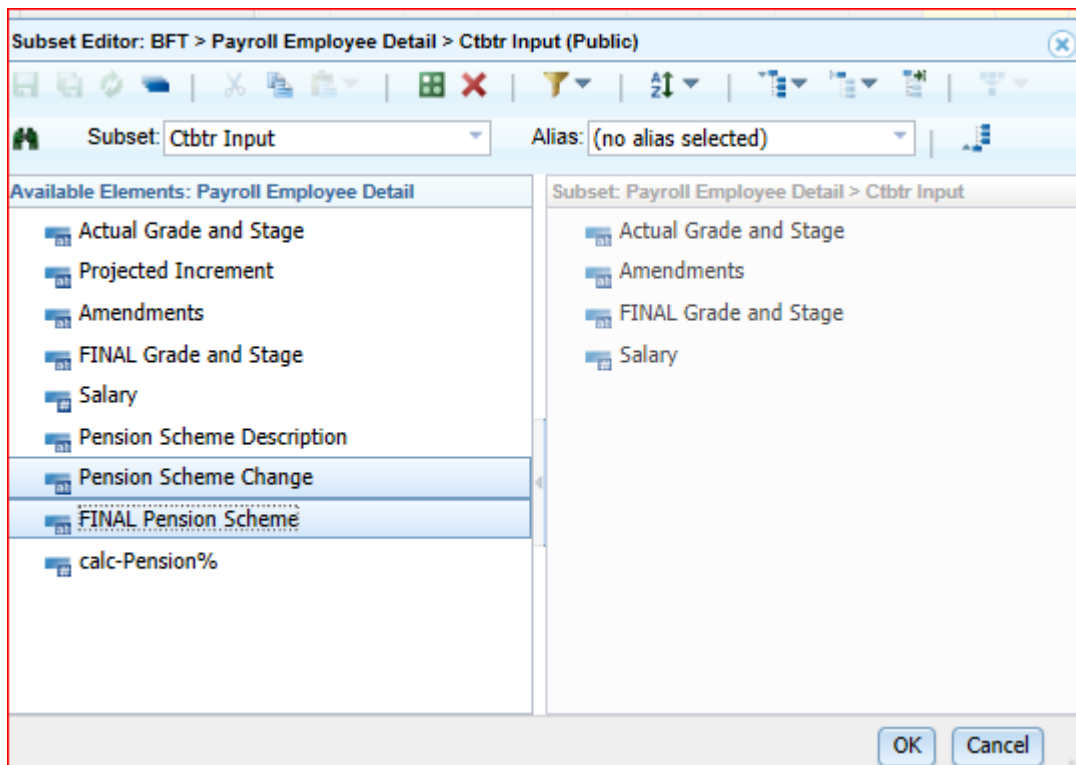
The pension scheme for the last actual month is displayed in a column in the main planning screen

The pension scheme details **cannot** be altered from the main planning screen. The planner must use the "Grade and Pension" screen and the subset editor.

Click down on the "Ctbr Input" detail box, which is at the top of the screen in the "rows" section.



This will open up the subset editor as shown below



Select the two fields highlighted in the lefthand half of the screen and drag them across the to right hand side before clicking "ok". This will open up the "pension change" line in the screen. If you have ownership, the pension change line will be in yellow, ready for input.



Go into any month in the projected part of the year (here “May” is selected) and there will be a drop down list of available pension schemes (including “none”). Select the appropriate scheme, save it and the amended pension scheme will appear as the “final pension scheme”, projections through the remainder of the year will use this amendment.

Only the first month where the change takes place needs to be amended.

		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	
ABARNO CM 2353955	SALARY	Actual Grade and Stage	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3			
		Amendments												
		FINAL Grade and Stage	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3	045.3
		Salary	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875	1,875
		Pension Scheme Change												
	ADDITIONAL SALARY	FINAL Pension Scheme	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3	NHS BAND 3		NHS BAND 3	NHS BAND 3
		Actual Grade and Stage												
		Amendments												
		Salary	0	0	0	0	0	0	0	0	0	0	0	0
		FINAL Pension Scheme												

















