

Change Employee Job and Salary in UltiPro

Overview: This job aid describes how an Employee Administrator can modify an employee's job and salary.

IMPORTANT:

To ensure that changes to an employee's job and/or salary are properly processed by UltiPro, it's extremely important to use the correct step for the specific change required. Do not process multiple consecutive changes to the same employee record; rather, allow each individual transaction to become approved and complete before proceeding with other changes.

- For changes to **job only**, refer to the **Change Job** process outlined in Section A, below.
- For changes to **salary, rate or pay group only**, refer to the **Change Salary** process outlined in Section B, below.
- For changes to **both job and salary**, refer to the **Change Job and Salary** process outlined in Section C, below.

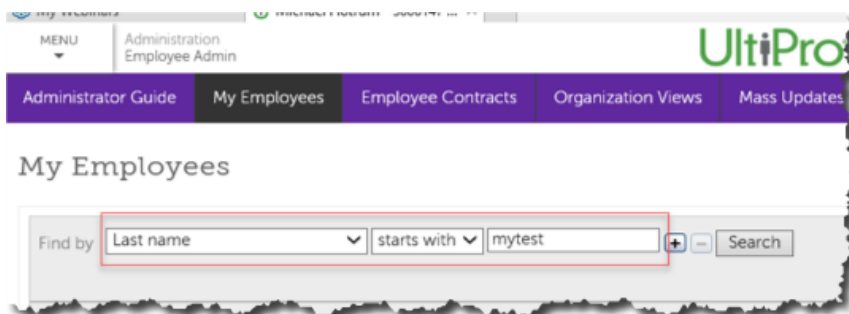
For any change, follow the initial steps below to access the employee record. Then, proceed to the appropriate section, as noted above, based on the change being processed.

TO BEGIN: OPEN EMPLOYEE RECORD

1. Click **Menu**, then select **My Employees** from the **Administration** tab.



2. Locate the employee name by using the criteria listed in the **Find by** drop down list then click **Search**.





- From the resulting list, click the employee name to open the record.

My Employees

Name ^	Employee Number	Work Phone	Extension	Status	Job
Mytest, Ash	3000166			Active	Admin

A. CHANGE JOB

- In the employee record, click the **Jobs** tab, then click **Change Job** under the heading **Things I Can Do**.

- Complete the required fields in the **Change Job** window:

a. General:

- Enter the job **Effective** date.
- Select a **Reason** from the drop-down list.
- Select a **Job Group** from the drop-down list. If the new job is non-union, select **JG000-TSA Jobs**.
- Select the **New job** from the drop-down list of active jobs.
- Type an alternate job title in the **Alternate title** box. Note, while not a mandatory field, this more specific job title will appear on the employee's pay statement.
- Select the name of the employee's supervisor in the **Supervisor** box. Use the magnifying glass to search for the appropriate name.
- If applicable, make an appropriate selection from the **Hire Source** drop-down menu.
- Complete organizational details including **Div/District**, **Resp/Site** and **Department**.
- If applicable, specify union details in the next two boxes. If the job is non-union, select **Non-Union** from the drop-down list.
- Type appropriate letter designation in the **Sick** and **OT Eligibility** boxes.



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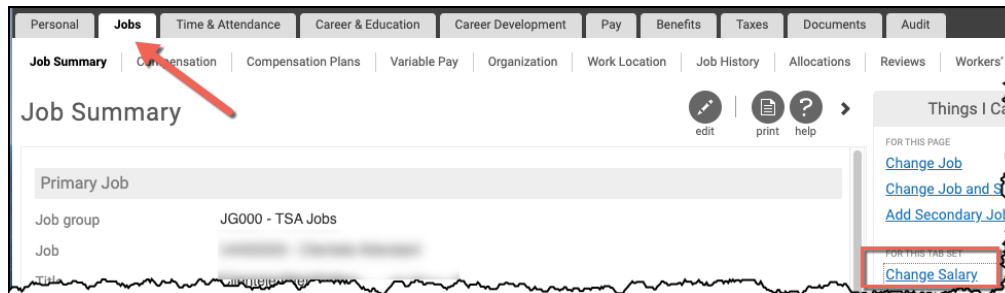


b. **Payroll:**

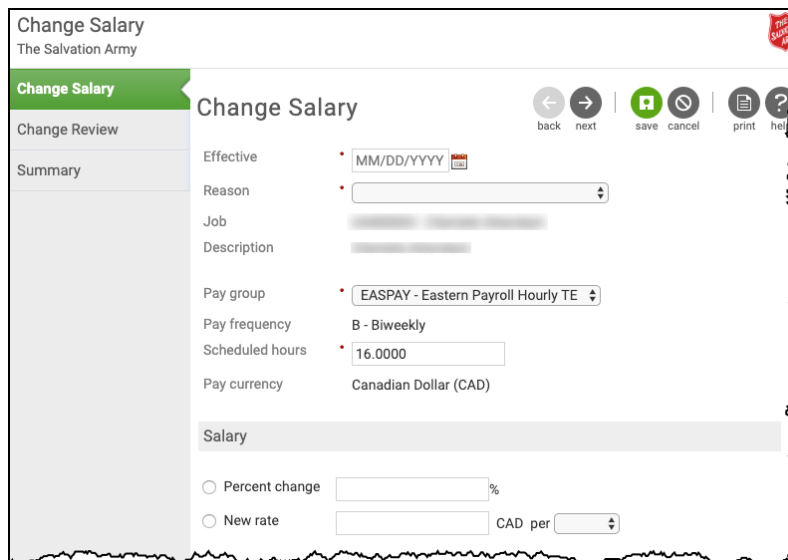
- i. Enter the employee's **Pay group**.
- ii. The **Pay frequency** default to a pre-set selection based on the Pay group selected and cannot be changed. Only active pay groups are listed.
- iii. Type the employee's **Scheduled hours**.
- iv. Select **Employee type**, **Hourly/Salaried** and **Full/Part time** from the drop-down lists.
- v. Place a checkmark in the Pay automatically checkbox if the employee should be paid automatically.
- vi. Click **Save**.

B. CHANGE SALARY

1. In the employee record, click the **Jobs** tab, then click **Change Salary** under the heading **Things I Can Do**.



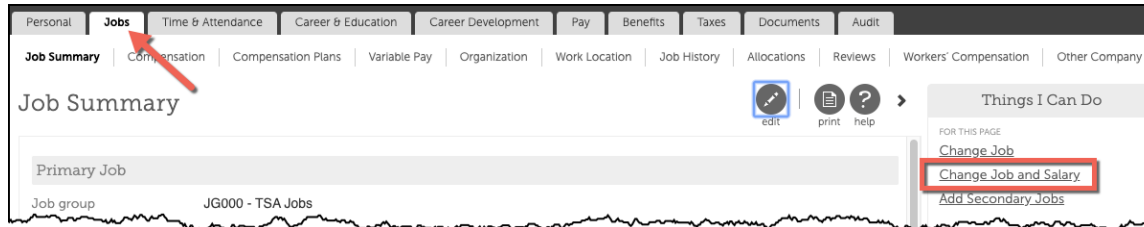
- a. In the **Change Salary** window, complete the **Change Salary** ribbon:
 - i. Enter the salary change **Effective** date.
 - ii. Select a **Reason** from the drop-down list.
 - iii. Select a new **Pay group**, if required.
 - iv. Type the employee's **Scheduled hours**.
 - v. Under the **Salary** heading, use either the **Percent change** or **New rate** field to specify the appropriate salary change then click **Next**.
- b. **Change Review Ribbon:** Click next to move to the summary screen.



- c. **Summary:** review all entries on the **Summary** page. If corrections are required, click the **Back** button to return to the desired page.
- d. Click **Submit** to complete the change.

C. CHANGE JOB AND SALARY

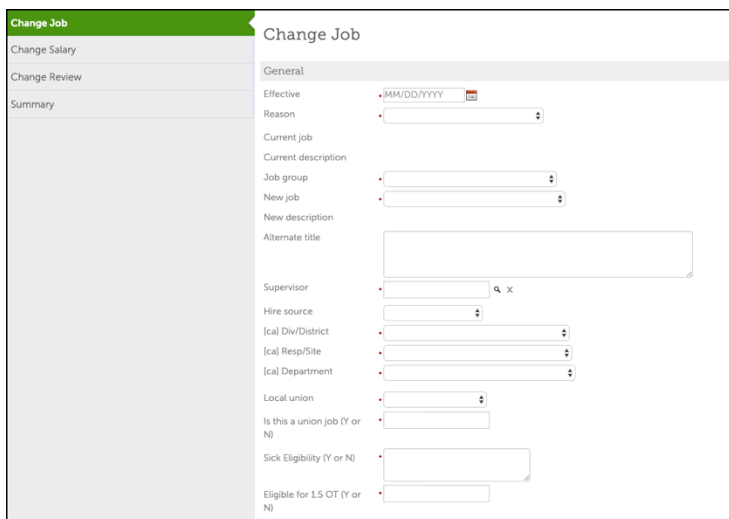
1. In the employee record, click the **Jobs** tab, then click **Change Job and Salary** under the heading **Things I Can Do**.



2. Complete each of the green ribbons in the **Change Job and Salary** window:

- a. **Change Job Ribbon > General:**

- i. Enter the job **Effective** date.
- ii. Select a **Reason** from the drop-down list.
- iii. Select a **Job Group** from the drop-down list. If the new job is non-union, select **JG000-TSA Jobs**.
- iv. Select the **New job** from the drop-down list of active jobs.
- v. Type an alternate job title in the **Alternate title** box. Note, while not a mandatory field, this more specific job title will appear on the employee's pay statement.
- vi. Select the name of the employee's supervisor in the **Supervisor** box. Use the magnifying glass to search for the appropriate name.
- vii. If applicable, make an appropriate selection from the **Hire Source** drop-down menu.
- viii. Complete organizational details including **Div/District**, **Resp/Site** and **Department**.
- ix. If applicable, specify union details in the next two boxes. If the job is non-union, select **Non-Union** from the drop-down list.
- x. Type appropriate letter designation in the **Sick** and **OT Eligibility** boxes.





b. **Change Job Ribbon > Payroll:**

- i. Enter the employee's **Pay group**.
- ii. The **Pay frequency** default to a pre-set selection based on the Pay group selected and cannot be changed. Only active pay groups are listed.
- iii. Type the employee's **Scheduled hours**.
- iv. Select **Employee type**, **Hourly/Salaried** and **Full/Part time** from the drop-down lists.
- v. Place a checkmark in the Pay automatically checkbox if the employee should be paid automatically.
- vi. Click **Next** to continue.

Payroll			
Pay group	• WESPAY - Western Payroll Hourly TE	Time clock	<input type="text"/>
Pay frequency	Biweekly	Pay automatically	<input type="checkbox"/>
Scheduled hours	• 32.0000		
Employee type	• REG - Regular		
Hourly/Salaried	• Hourly		
Full/Part time	• Part Time		

- c. **Change Salary:** use either the **Percent change** or **New rate** field to specify the appropriate salary change then click **Next**.

Change Job and Salary
Olga Kozokar - 3007350 - The Salvation Army

Change Job | **Change Salary** | Change Review | Summary

Change Salary

Salary

Percent change %

New rate CAD per



- d. **Change Review Ribbon:** change employee salary and performance review information in this screen. To move past this screen without making any additions or adjustments, click **Next**. If a previous view exists for the employee, it will be displayed under the **Previous review** heading. To update or add to the **Change Review** page, click either an existing linked review to update a current review or follow the steps below to add new information:
- Click **Add Review History** to add new information.
 - Select the review date, salary review rating and salary review type.
 - Enter the name of the salary reviewer.
 - The new review date may be a default selection, based on configuration rules, however this date can be overwritten.
 - In the Performance section, select a review date, performance review rating and performance review type.
 - Enter the name of the performance reviewer.
 - The new review date may be a default selection, based on configuration rules, however this date can be overwritten.
 - Click **Next** to proceed to the Summary page.

- e. **Summary:** review all entries on the **Summary** page. If corrections are required, click the **Back** button to return to the desired page.
- f. Click **Submit** to complete the change.