

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, use one process or allow previous transactions to become approved and complete before proceeding with other changes.

There are three different processes outlined in this job aid; select the appropriate one based on the type of change being made:

Change Type	Scenario	Refer to
Change Job	Change to Job Code, Department, Job Title	Section A
Change Salary	Change to Pay Rate, Pay Group, Scheduled Hours	Section B
Change Job and Salary	Changes that impact both types, above	Section C

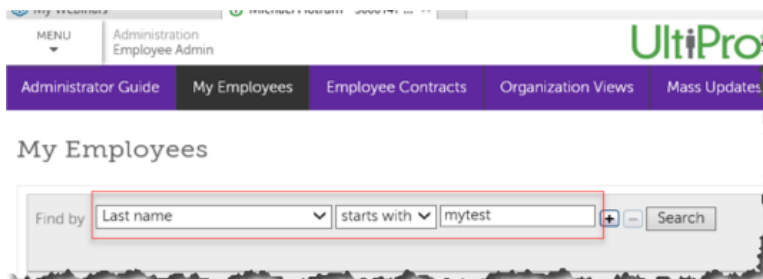
To begin any of the above change types, start by opening the employee record. Then, refer to the appropriate instructions for each specific change type.

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**.





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- 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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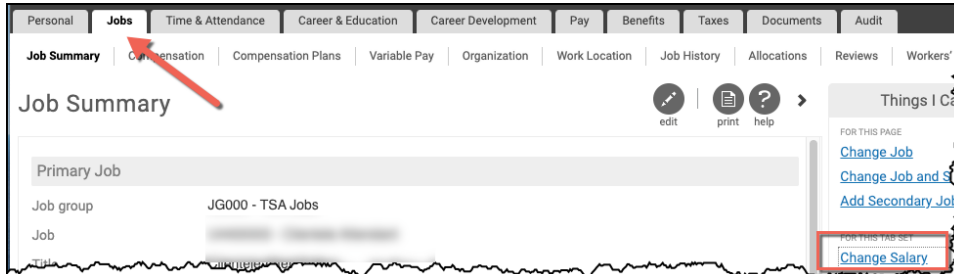


b. **Payroll:**

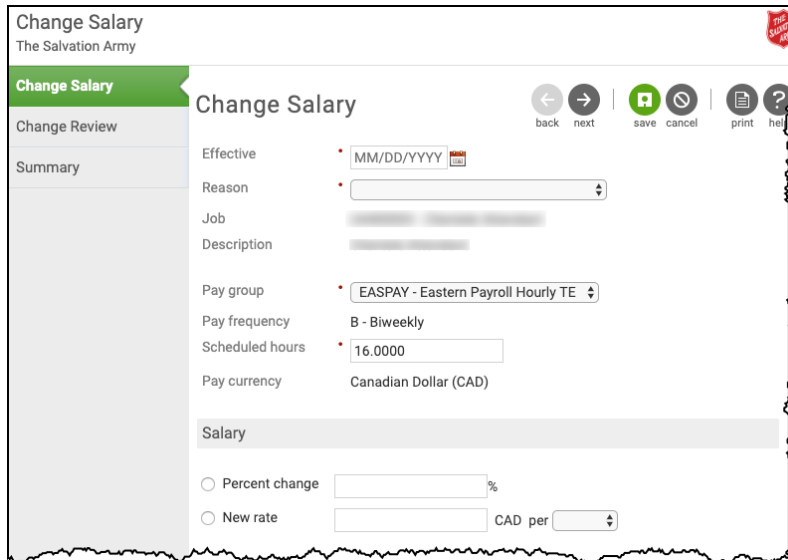
- i. Enter the employee's **Pay group**.
- ii. The **Pay frequency** default to a pre-set selection based on the Pay group selected and cannot be changed. Only active pay groups are listed.
- iii. Type the employee's **Scheduled hours**.
- iv. Select **Employee type**, **Hourly/Salaried** and **Full/Part 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**.



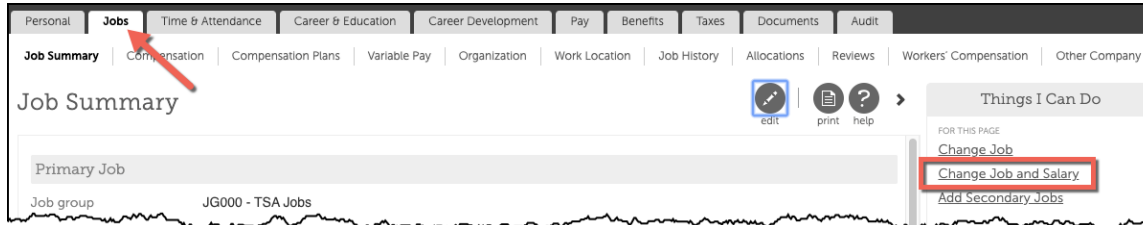
- a. In the **Change Salary** window, complete the **Change Salary** ribbon:
 - i. Enter the salary change **Effective** date.
 - ii. Select a **Reason** from the drop-down list.
 - iii. Select a new **Pay group**, if required.
 - iv. Type the employee's **Scheduled hours**.
 - v. Under the **Salary** 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.

B. CHANGE JOB AND SALARY

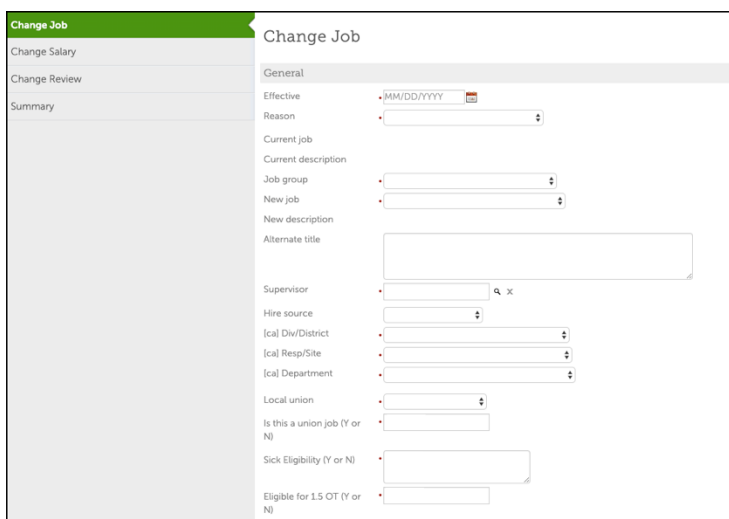
1. In the employee record, click the **Jobs** tab, then click **Change Job and Salary** under the heading **Things I Can Do**.



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

back next save cancel draft print help



- 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.