


A change in employment arrangements may mean an employee is no longer entitled to an allowance, e.g. at the end of a period of acting up, or other change to appointment. In such cases, where the allowance is not to be replaced by a new allowance, it must be ended.

In addition, where a new allowance is to be added and schedule allowance 2A is involved, existing allowances will not automatically be ended when a new one is added to replace it and so the original allowance **MUST** be ended first.

Never cancel an allowance within the Core system. This function is reserved for the Payroll Team only in very specific circumstances.

 **Note:** Where the end date was entered during the set-up of the allowance, and hence is already recorded, it is not necessary to follow this guide – unless the end date is now earlier than planned.

Refer to **QRG: CH4_Manage Changes: New & Changes to Allowances** for guidance on setting up a new allowance to replace a previous allowance.

Navigate to: Personnel > Maintenance > Personal Profile

1. Search for and open the relevant employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the **Appointment Details** button. The *Post Appointment Maintenance* window opens.
3. Go to **Selection > View Position History**. The *Maintain HR Salary Amendments* window opens:

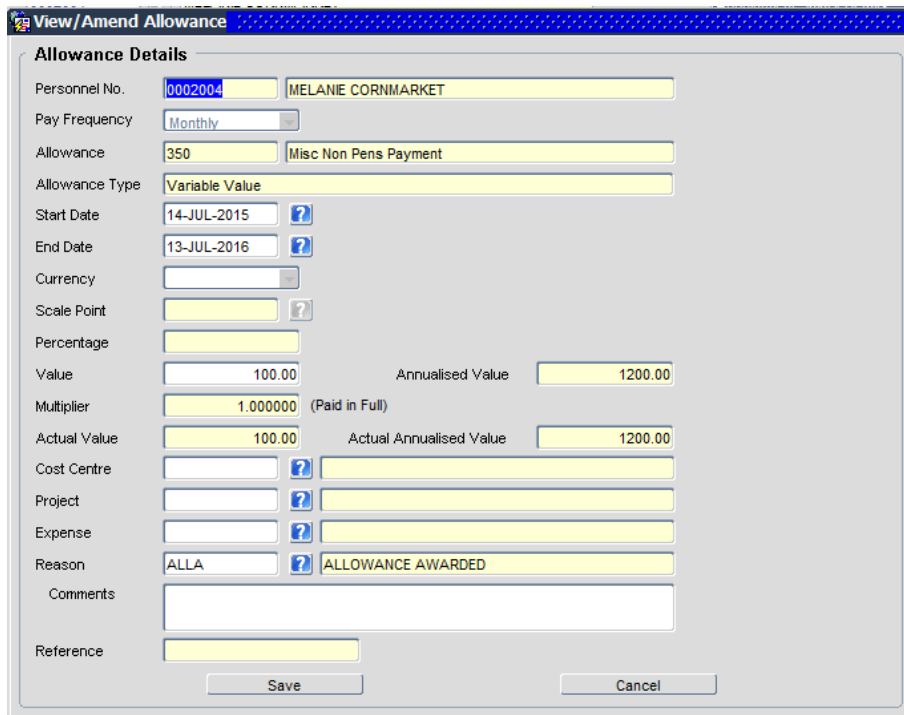
4. Switch to the **Allowance Details** tab to show the detail of the allowances:

Status	Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason
Approved	Misc Non Pens Payment	Variable Value		100.00	1200.00	14-JUL-2015	13-JUL-2016	ALLOWANCE AWARDED

5. If relevant, ensure the correct allowance is highlighted and click on the **Salary Details** button. The *View/Amend Allowance* window opens.

6. Click on the button.

7. Click in response to the question 'Are you sure you want to amend this allowance?'



View/Amend Allowance

Allowance Details

Personnel No. MELANE CORNMARKET

Pay Frequency

Allowance Misc Non Pens Payment

Allowance Type

Start Date ?

End Date ?

Currency

Scale Point ?

Percentage

Value Annualised Value

Multiplier (Paid in Full)

Actual Value Actual Annualised Value

Cost Centre ?

Project ?

Expense ?

Reason ? ALLOWANCE AWARDED

Comments

Reference

8. Enter the **End Date** as required i.e. the last date the allowance should be paid up to.

9. Click and in response to the question 'Are you sure you want to update this allowance?'

10. Exit all windows back to the Personnel main screen.

NEXT STEPS:

If relevant, generate and send a letter to the individual to confirm the change.