Case Study 9: How to change or add a pension scheme to an employee

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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
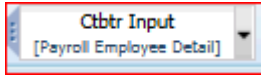

This should cover the majority of cases, however there may be occasions when the planner needs to intervene. Typically these might be:-

- The NewPerson was created with the wrong pensions scheme, in error.
- There is a known issue with the HRCore information
- Occasionally if a new role is added and/or the employee switches from "salary" to "additional salary" the current pension scheme attribution is lost for that forecasting exercise and may need re-attributing in order to correct the pension cost projection.

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

The Grade and Pension screen is set to display Grade and salary information only, however it is possible to access the pension scheme details and review of change them.

Click down on the "Ctbr Input" detail box

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           ┌──────────────────────────┐
           │  Ctbtr Input             │
           │  [Payroll Employee Detail]│  ▼
           └──────────────────────────┘
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This will open up the subset editor, as shown below
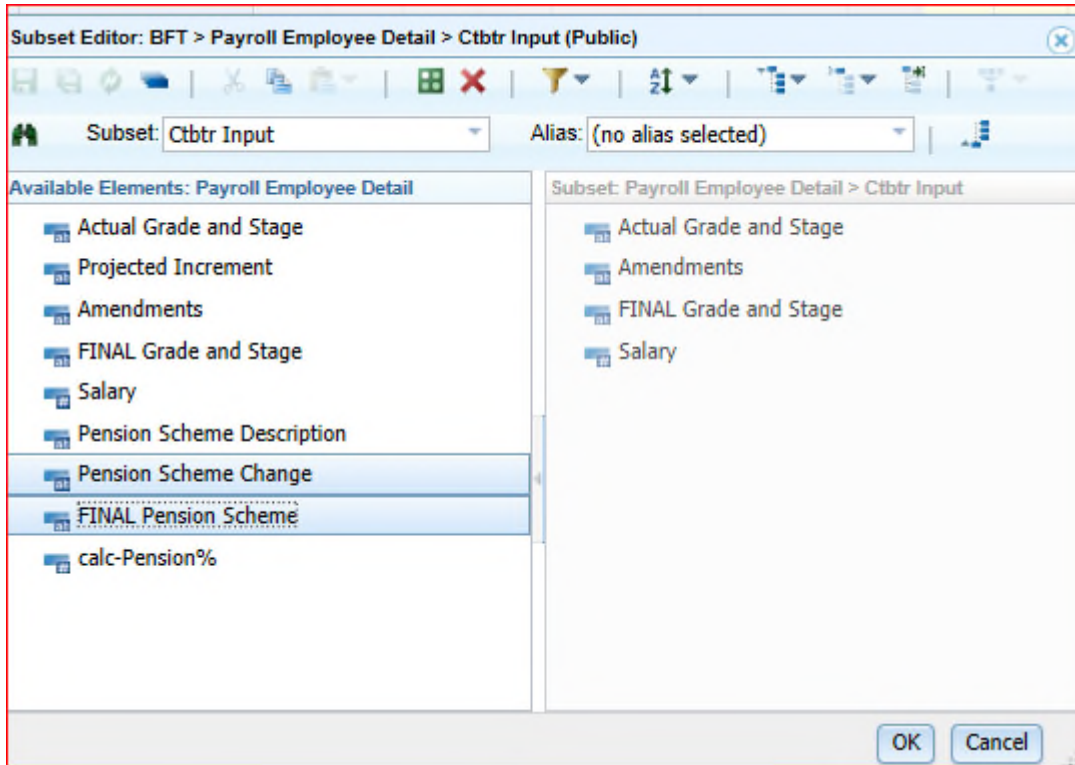
Select the three pension related fields highlighted here by "shift and click". Then drag them across to the right hand section of the editor

Select the three pension related fields highlight here by "shift and click" and then drag them across to the right hand section of the editors, then press 2ok". This will open up the "pension change" line in 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.