

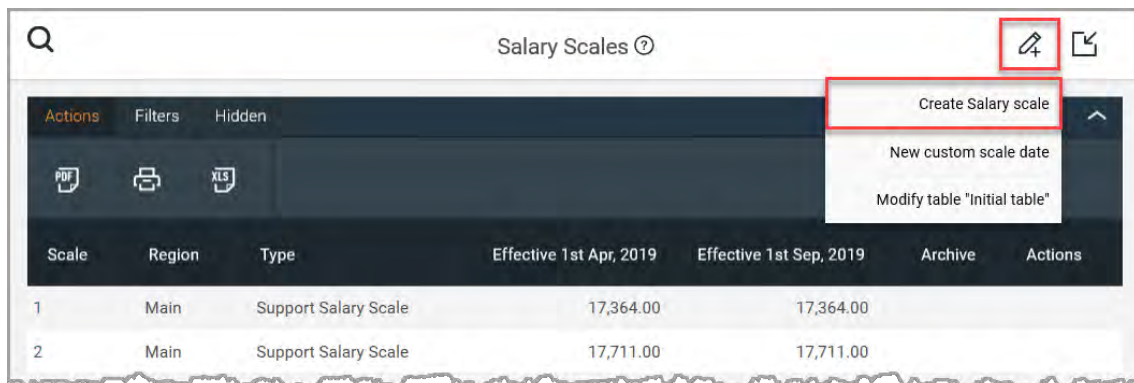


Create and Update Custom Scales in IRIS Financial Planner

Custom salary scales can be created then applied to staffing contracts. Any custom scales used in your planner are collated into an initial table which is automatically applied to any non-fixed budgets.

Creating Custom Salary Scales

1. Select **Staffing > Salary Scales** from the sidebar menu. The **Salary Scales** page is displayed.



2. Click the **Add New** icon at the top of the page, then select **Custom Salary Scale** from the drop-down menu. The **Create Salary Scale** page is displayed.

	Main	Inner	Outer	Fringe
Initial table	30000	30000	30000	30000

3. Enter a prefix **Code** for the scale. For example, entering **ABC** will result in **ABC1** for point 1, **ABC2** for point 2 and so on.
4. Enter numerical value in the **Point** field. This will be appended to the prefix code.
5. Enter the number of years a contract should remain on the scale before moving to the next, if it has been incremented, in the **Tenure** field.

6. Finally, complete the applicable rates in the **Main**, **Inner**, **Outer** and **Fringe** fields. We recommend entering the same value in each field.
7. If required, add any further detail in the **Description** field.
8. Click the **Save** icon (green tick) at the top of the page. If you want to add further salary scales, click the **Save and Add New** icon (black tick) to save the scale and create a new record.
9. A message is displayed indicating that the salary scale has been successfully created. You are returned to the **Budget Codes** page with the new code list in alpha/numeric order.



Salary Scales ⓘ

147 items : 1 pages

Scale	Region	Type	Effective 1st Apr, 2019	Effective 1st Sep, 2019	Archive	Actions
70	Main	Support Salary Scale	45,591.00	45,591.00		
ABC1	Main	Custom Teacher Scale	30,000.00	30,000.00		edit
AST1	Main	Teacher Salary Scale	41,267.00	41,267.00		
AST10	Main	Teacher Salary Scale	51,564.00	51,564.00		
AST11	Main	Teacher Salary Scale	52,902.00	52,902.00		

Setting Salary Increment Dates

Once custom salary scales have been created, you will need to define the effective dates for salary increases.

1. Select **Staffing > Salary Scales** from the sidebar menu. The **Salary Scales** page is displayed.

Salary Scales ⓘ

Create Salary scale

New custom scale date

Scale	Region	Type	Effective 1st Apr, 2019	Effective 1st Sep, 2019	Effective 1st Dec, 2019	Archive	Actions
1	Main	Support Salary Scale	17,364.00	17,364.00	17,364.00		
2	Main	Support Salary Scale	17,711.00	17,711.00	17,711.00		

- Click the **Add New** icon at the top of the page, then select **New custom scale date** from the drop-down menu. The **New Custom Scale Date** page is displayed.

- Enter a **Description** such as the month and year the scale is being updated for.
- To update the scale date, click into the **Effective date** field and select the required date from the calendar.
- We recommend leaving the **Inflation percentage** field blank at this stage.
- Click the **Save** icon (green tick) to save the custom scale date.
- You will be returned to the **Salary Scale** page with the newly created date listed. The following message is displayed which can be closed by clicking the cross.

Please note: Your new scale date has been added to each of your non-fixed budgets. If you wish to change the date that it applies to a particular budget, or remove it from a budget completely, you can change it by editing your budget from your **Budgets** screen, under the "Custom scale tables" section.

Scale	Region	Type	Effective 1st Apr, 2019	Effective 1st Sep, 2019	Effective 1st Dec, 2019	Archive	Actions
67	Main	Support Salary Scale	45,591.00	45,591.00	45,591.00		
68	Main	Support Salary Scale	45,591.00	45,591.00	45,591.00		
69	Main	Support Salary Scale	45,591.00	45,591.00	45,591.00		
70	Main	Support Salary Scale	45,591.00	45,591.00	45,591.00		
ABC1	Main	Custom Teacher Scale	30,000.00	30,000.00	30,000.00		edit

- Click the **Edit** hyperlink adjacent to the applicable Custom Salary Scale. The **Edit Salary Scale** page is displayed.

Scale type: Custom Teacher Scale

Code: ABC

Point: 1

Tenure: 1

	Main	Inner	Outer	Fringe
Initial table	30000	30000	30000	30000
December 2019 (Trust)	32000	32000	32000	32000

Description:

Archived:

- The newly created date will appear as a new row. Complete the applicable rates in the **Main**, **Inner**, **Outer** and **Fringe** fields (we recommend adding the same value in each field). Click the **Save** icon (green tick) at the top of the page. The **View Salary Scale** page is displayed.

Type: Custom Teacher Scale

Scale: ABC1

Tenure length: 1 year

Description:

Region	1st Sep, 2019	1st Dec, 2019
Main	30,000.00	32,000.00

Where to Get More Help and Information



Our currently available documentation can be found at the following address:

<https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation>

You can also utilise information on our Support Portal at the following address:

<https://psfinancials.zendesk.com>

Providing Feedback on our Documentation

If you have any feedback, comments or suggestions regarding our documentation, please email:



documentation@psfinancials.com

DOCUMENT REFERENCE	DESCRIPTION
TM-171219-CUC-IFP-1.0	Initial release