

This work instruction was last updated: 14/04/2010

Changing a Start Date Process

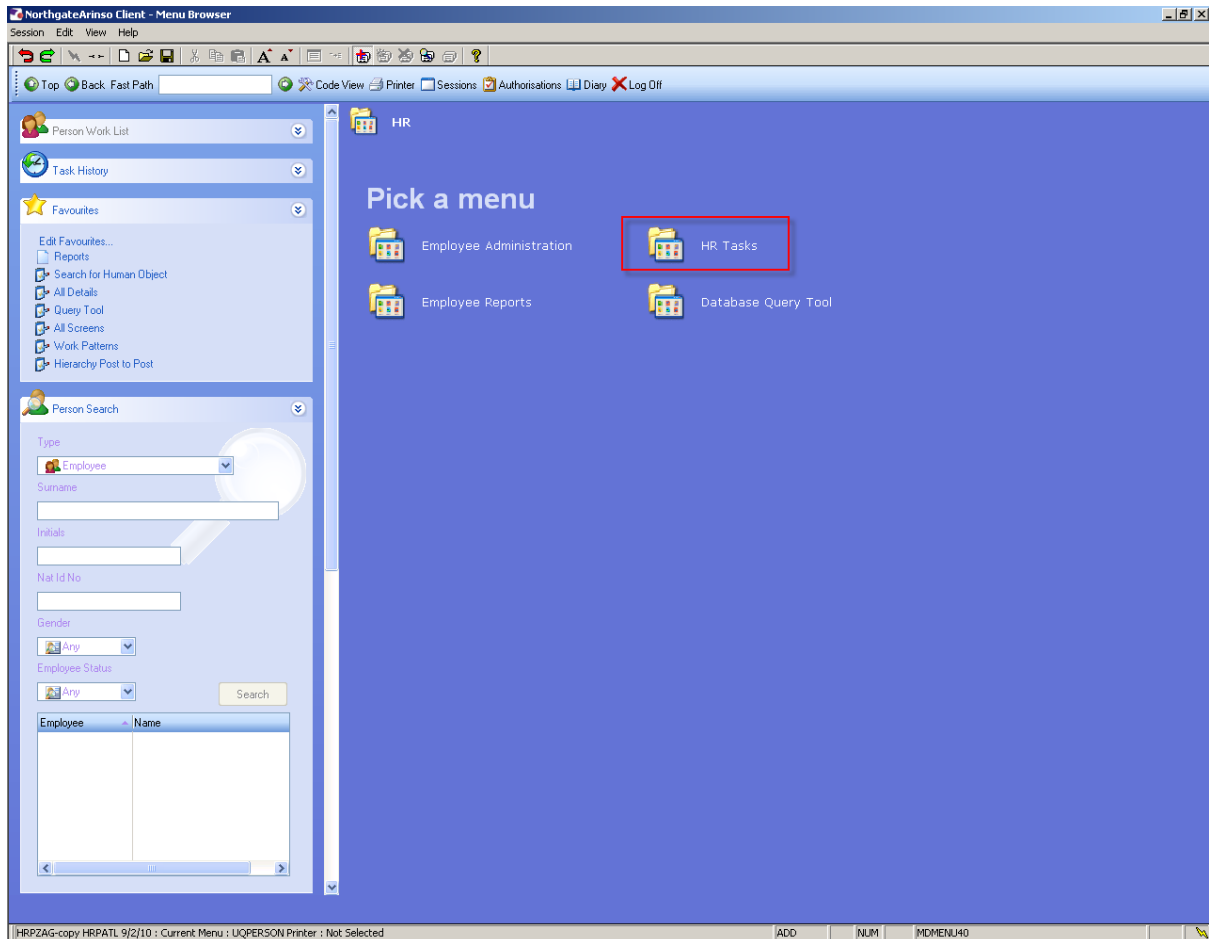
- This Work Instruction describes how to change a start date for someone on ResourceLink. This applies to changing a start date on any post. An example of when you would need to do this might be if a school asks you to set up a new starter who is joining the University in four months' time. Then, much nearer the time the school contacts you again informing you that the new starter will now start a week earlier (or later) than originally planned.

☛ Please note that everything must be done in the correct order stated here or you will not be able to complete the task.

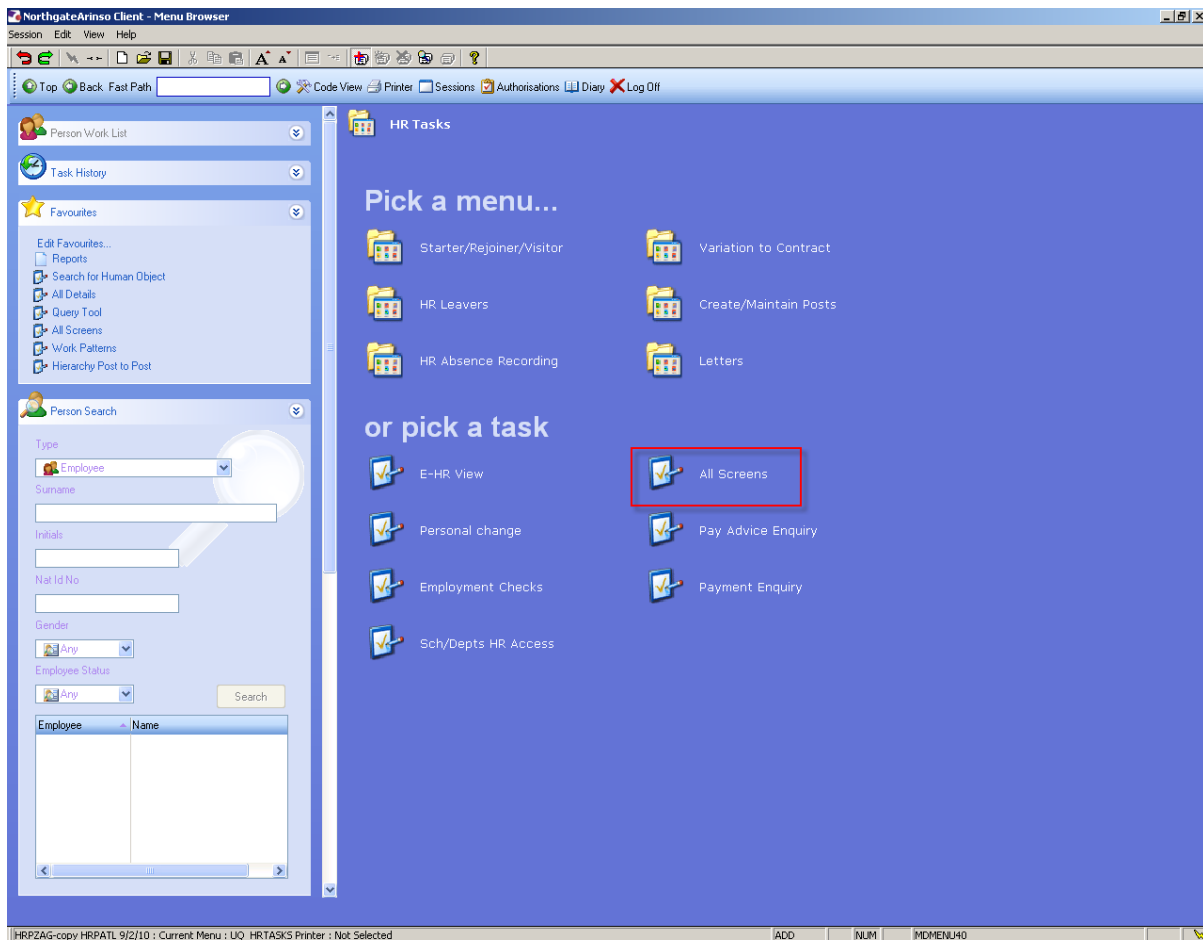
- 1 Changing an Employee's Start Date
- 2 Basic Pay Details Data Entry Screen
- 3 Employment Detail Data Entry Screen
- 4 The Current Post Holding Data Entry Screen
- 5 Post Holding Costing data entry screen
- 6 Holiday Entitlements data entry screen
- 7 Fixed Pay Elements Summary data entry screen
- 8 Standard letters
- 9 Notify Payroll of the change you have made

1 Changing an Employee's Start Date

ResourceLink HR Home Page > HR Tasks



ResourceLink HR Home Page > HR Tasks > All Screens



The Employee Selection Screen will then be displayed.

Task - All Screens - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee ☒ Y As at Date

Previous Surname

Known As

Add Search

Surname	Init	Title	Emp Number	National ID Number	Start Date	For

Select an Employee


Select Exit Save List

Enter an Employee Number

1.1 In the **Employee** field enter the employee's number

1.2 Click on **Select** 

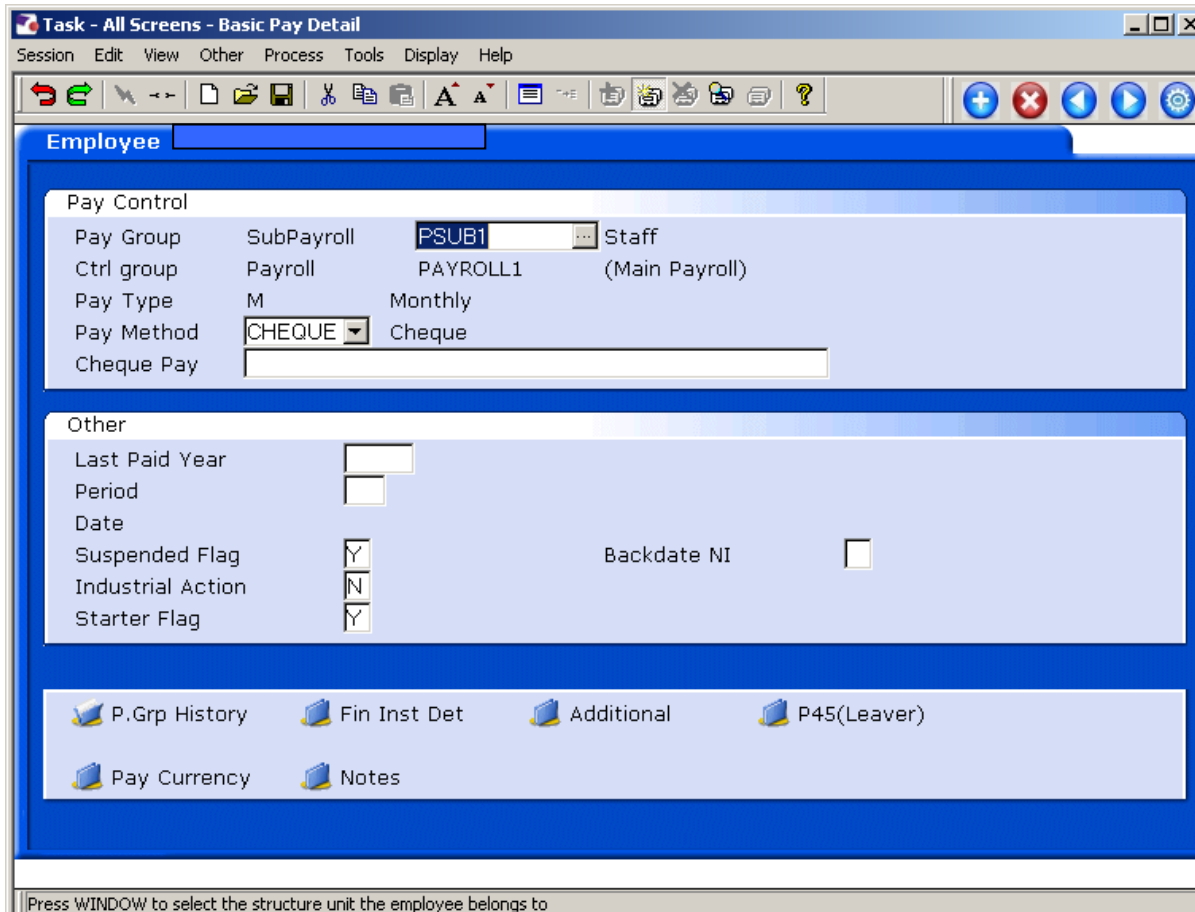
1.3 Click on Screens  to select Basic Pay Details


CTTASKVW View Current Screens in Task
✕

Seq	Screen	Screen Name	Status
001	MD55S3	Personal Details	<
002	UVDFLT	Employee Fixed Pay Element Sum	Y
003	MD55S12	Person Equal Opportunities	
004	MD55S4	Person Relationship Summary	
005	MD47S1	Employment Detail	
006	MD47S7	Employee Post Holding History	
007	MD47S23	Employee Post Holding Costing	
008	MD49S2	Employee Basic Pay Details	
009	MD48S2	Employee Temporary Pay Element	
010	MD82S5	Employee Holiday Entitlement	
011	MD55S78	Asset Management	

2 Basic Pay Details Data Entry Screen

- ① The first step of changing an employee's start date is to amend the effective date on the employee's **PSUB Pay Group** on the Basic Pay Details Screen. This involves entering a different pay group before reverting back to the correct one.



2.1 Window into the **Pay Group** field.

Seq	Structure	Description	Level
001	PSUB1	Staff	SubPayroll
002	PSUB2	Pensioners	SubPayroll
003	PSUB3	Fees/Casual	SubPayroll
004	PSUB4	Teachers	SubPayroll
005	PSUB5	Unpaid	SubPayroll
006	PAYROLL1	(Main Payroll)	Payroll
007	PAYROLL2	(Teachers Payroll)	Payroll
008	PAYROLL3	(Unpaid)	Payroll

2.2 Select a different **PSUB** group by clicking on the **PSUB group** in the list provided.

e.g. If the employee is on a **PSUB1** pay group, choose the **PSUB3** pay group.

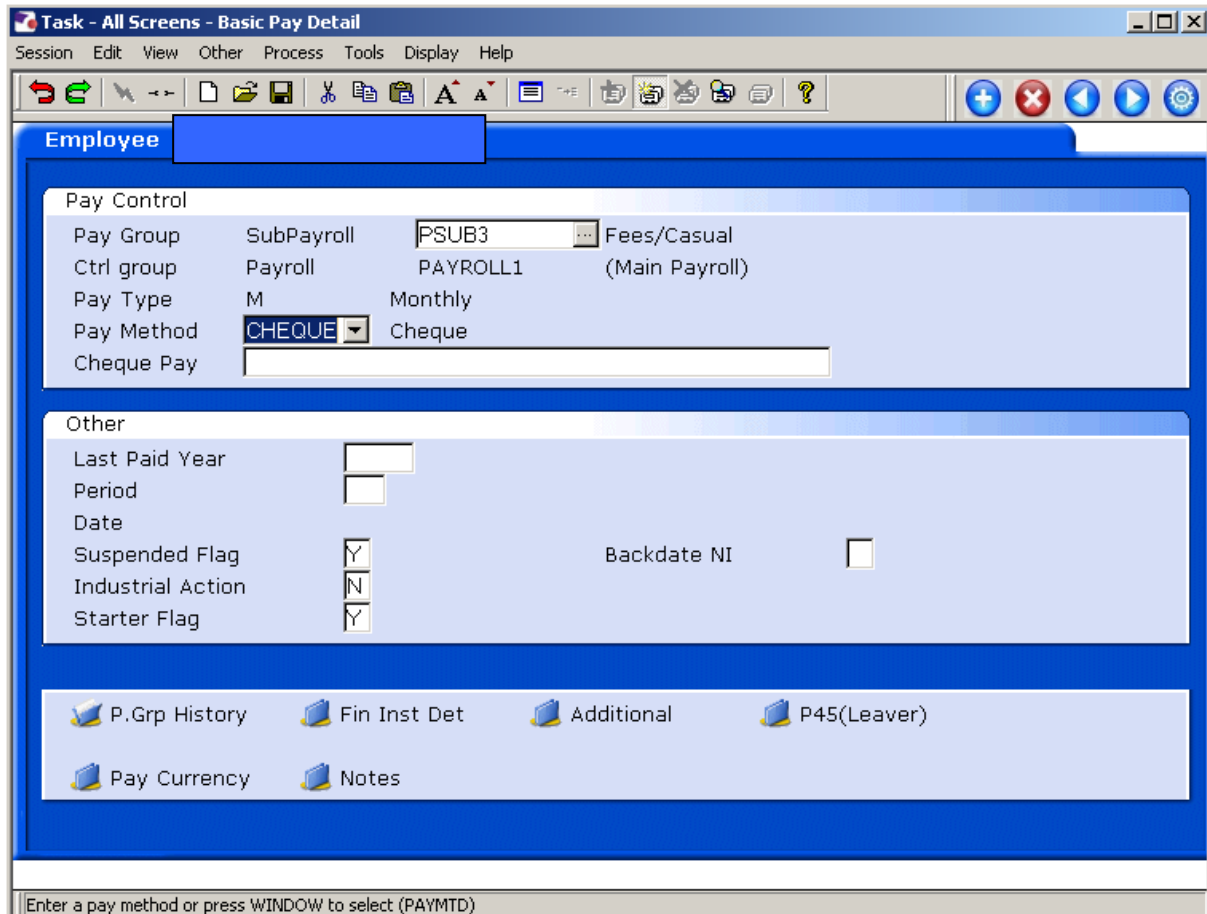
- Any other **PSUB group** can be chosen here because by the end of the process this information will be overwritten with the correct **PSUB group** and **Effective Date**.

- The new **Pay Group** will appear in the **Pay Group** Field. Press **Enter** (this will bring up the **Effective Date** field).

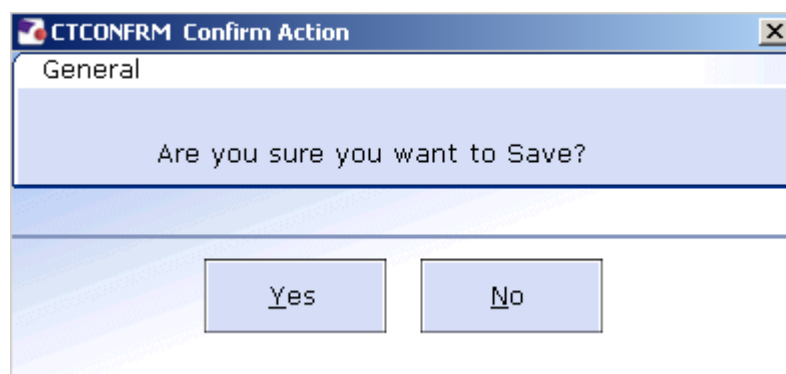
- Enter the **Effective Date** that you wish the employee to have following the change (i.e. the new correct start date for this employee).

- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

2.5 Press Enter








- ## 2.6 Click on to save the changes.




- ## 2.7 Click on **Yes**.

- ## 2.8 If you are using a task that has standard letters attached to it you may now see the following screen: if so, click on **Exit**.

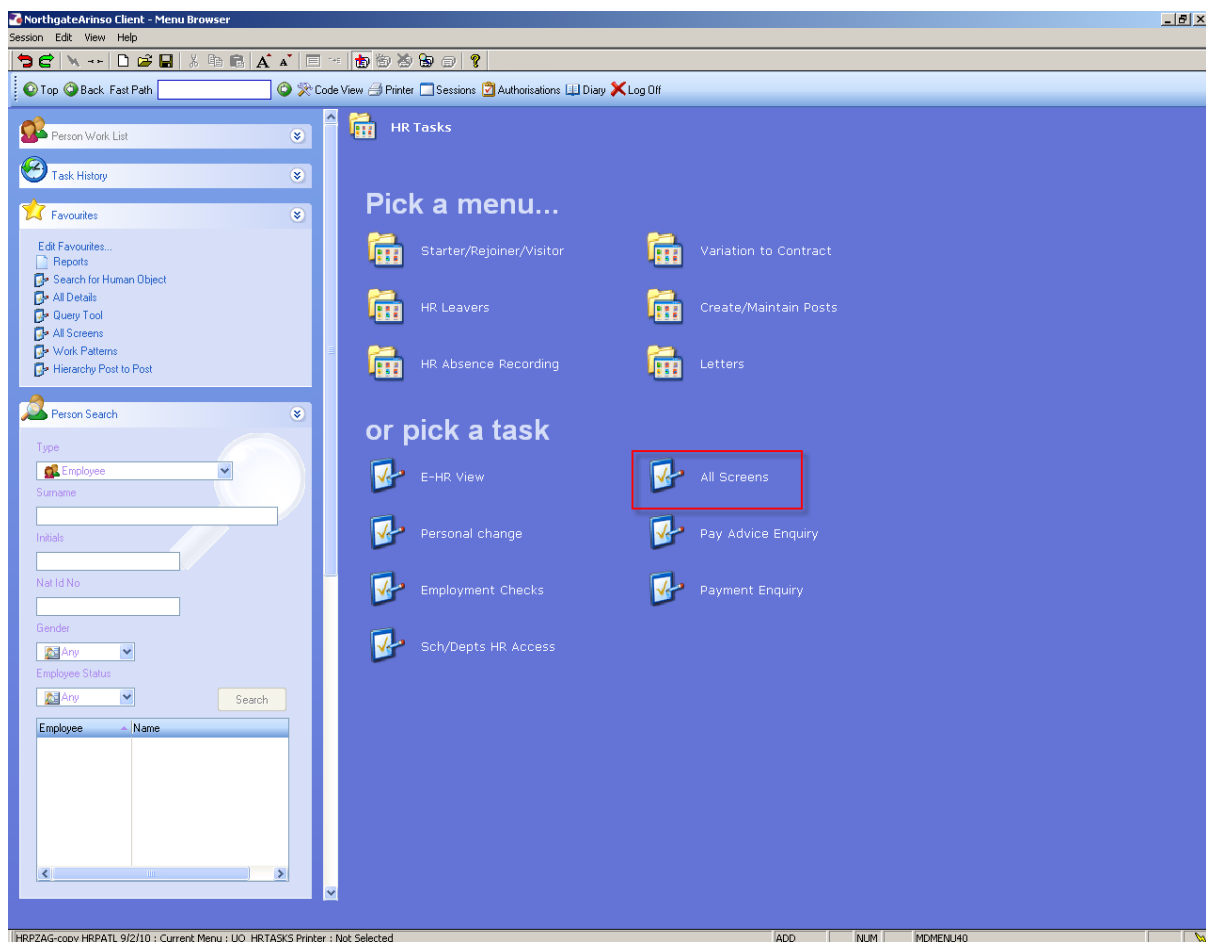
Seq	Letter	Ver	Description	Let Opts	Copies
001	4+ACAD	001	Level 4+ academic contract	NOACT	1
002	MCURIE	001	Marie Curie Contract	NOACT	1
003	MSA1B2	001	Contract for MSA 1B/2	NOACT	1
004	MSA3FTFT	001	MSA 3 Full Time Fixed Term	NOACT	1
005	MSA4PLUS	001	Contract for MSA 4+	NOACT	1

 Add
  Change
  Delete
  Expand
  Exit

-  You do not want to generate any standard letters at this stage because the task is incomplete and the **PSUB group** remains incorrect. You will now go back into the task to revert the **PSUB group** back to the correct format.

2.9 Go back into the **All Screens** task:

ResourceLink HR Home Page > HR Tasks > All Screens



Northgate Arinso Client - Menu Browser

Session Edit View Help

Top Back Fast Path Code View Printer Sessions Authorisations Diary Log Off

Person Work List

Task History

Favourites

Edit Favourites...

- Reports
- Search for Human Object
- All Details
- Query Tool
- All Screens
- Work Patterns
- Hierarchy Post to Post

Person Search

Type: Employee

Surname:

Initials:

Nat Id No:

Gender: Any

Employee Status: Any

Search

Employee Name

HR Tasks

Pick a menu...

- Starter/Rejoiner/Visitor
- HR Leavers
- HR Absence Recording
- Variation to Contract
- Create/Maintain Posts
- Letters

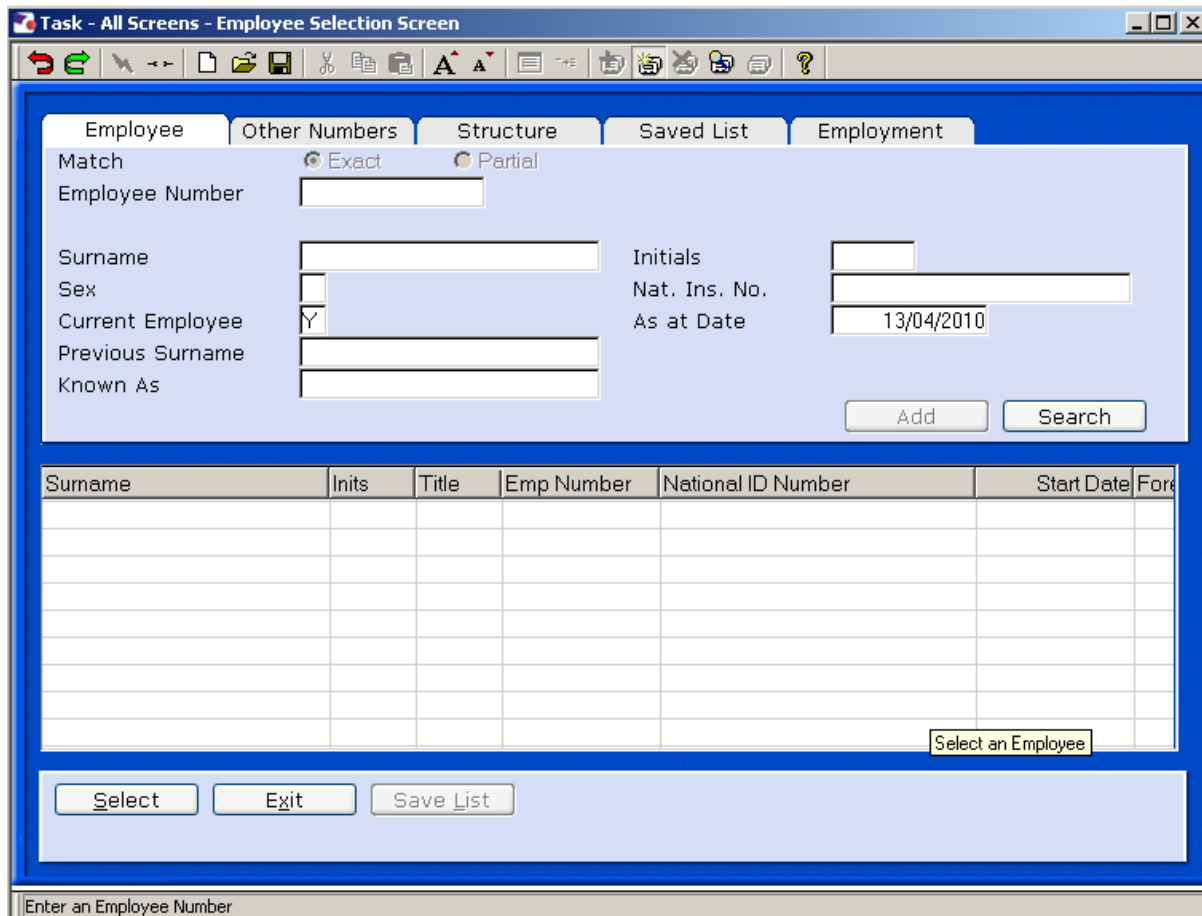
or pick a task


- E-HR View
- Personal change
- Employment Checks
- Sch/Depts HR Access
- All Screens
- Pay Advice Enquiry
- Payment Enquiry

HRP2AG-copv HRPATL 9/2/10 : Current Menu : UQ: HRTASKS Printer : Not Selected

ADO INUM INDMENU40

The Employee Selection Screen will be displayed.



 The screen above will **not** appear if the employee has already been selected following the instruction in **Section 1**.

2.10 In the **Employee** field enter the employees UPI (Unique Personal Identifier – can be located on HR form).

2.11 Click on **Select** .

2.12 Click on Screens  to select Basic Pay Details

CTTASKVW View Current Screens in Task

Seq	Screen	Screen Name	Status
001	MD55S3	Personal Details	<
002	UVDFLT	Employee Fixed Pay Element Sum	Y
003	MD55S12	Person Equal Opportunities	
004	MD55S4	Person Relationship Summary	
005	MD47S1	Employment Detail	
006	MD47S7	Employee Post Holding History	
007	MD47S23	Employee Post Holding Costing	
008	MD49S2	Employee Basic Pay Details	
009	MD48S2	Employee Temporary Pay Element	
010	MD82S5	Employee Holiday Entitlement	
011	MD55S78	Asset Management	

2.13

Task - All Screens - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee

Pay Control

Pay Group SubPayroll PSUB3 Fees/Casual
 Ctrl group Payroll PAYROLL1 (Main Payroll)
 Pay Type M Monthly
 Pay Method CHEQUE Cheque
 Cheque Pay

Other

Last Paid Year
 Period
 Date
 Suspended Flag ☒ Backdate NI ☐
 Industrial Action ☒
 Starter Flag ☒

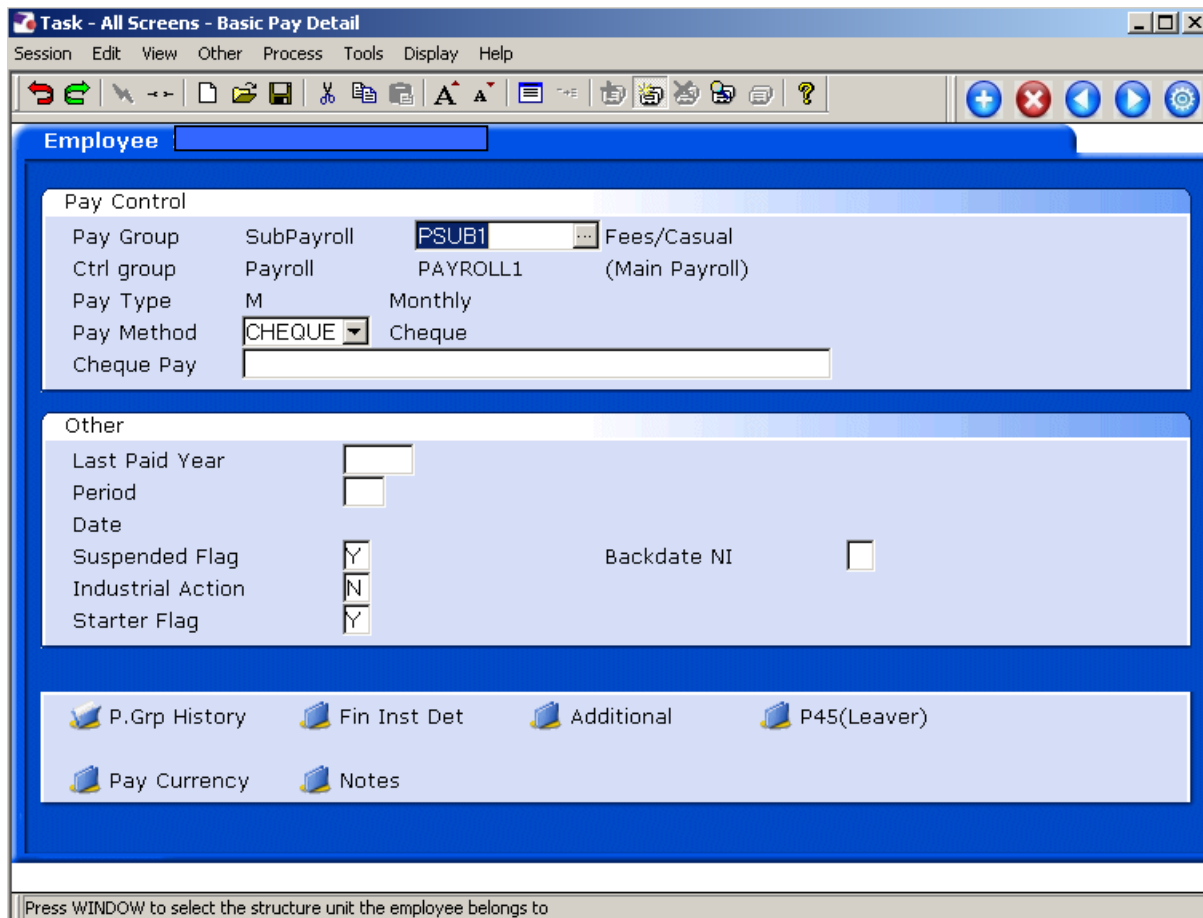
Enter a pay method or press WINDOW to select (PAYMTD)

2.14 Window into the **Pay Group** field.

Seq	Structure	Description	Level
001	PSUB1	Staff	SubPayroll
002	PSUB2	Pensioners	SubPayroll
003	PSUB3	Fees/Casual	SubPayroll
004	PSUB4	Teachers	SubPayroll
005	PSUB5	Unpaid	SubPayroll
006	PAYROLL1	(Main Payroll)	Payroll
007	PAYROLL2	(Teachers Payroll)	Payroll
008	PAYROLL3	(Unpaid)	Payroll

2.15 Select the correct **Pay Group** by clicking on the **PSUB** group in the list provided.

i.e. revert back to the correct **PSUB** group that was in the field before the initial change was made at step 3.2.



Task - All Screens - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee

Pay Control

Pay Group SubPayroll **PSUB1** Fees/Casual

Ctrl group Payroll PAYROLL1 (Main Payroll)

Pay Type M Monthly

Pay Method **CHEQUE** Cheque

Cheque Pay

Other

Last Paid Year

Period

Date

Suspended Flag ☒ Backdate NI ☐

Industrial Action ☒

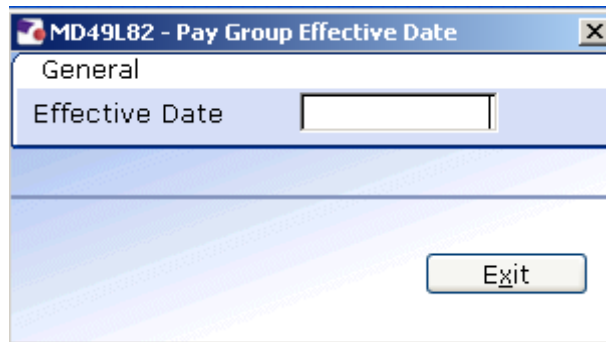
Starter Flag ☒

P.Grp History Fin Inst Det Additional P45(Leaver)

Pay Currency Notes

Press WINDOW to select the structure unit the employee belongs to

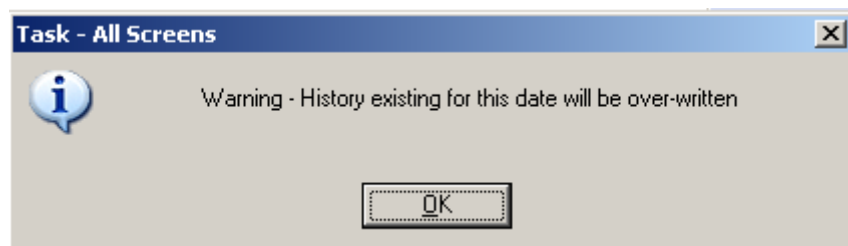
2.16 The correct **Pay Group** will appear in the **Pay Group** Field. Press **Enter** to change the effective date.



- 2.17 Enter the **Effective Date** that you wish the employee to have following the change (The same date as entered for the false **PSUB** group in step 3.4).


🔔 Dates MUST be entered in the format **ddmmyyy**. For example 16031975 for 16 March 1975.

- 2.18 Press **Enter**



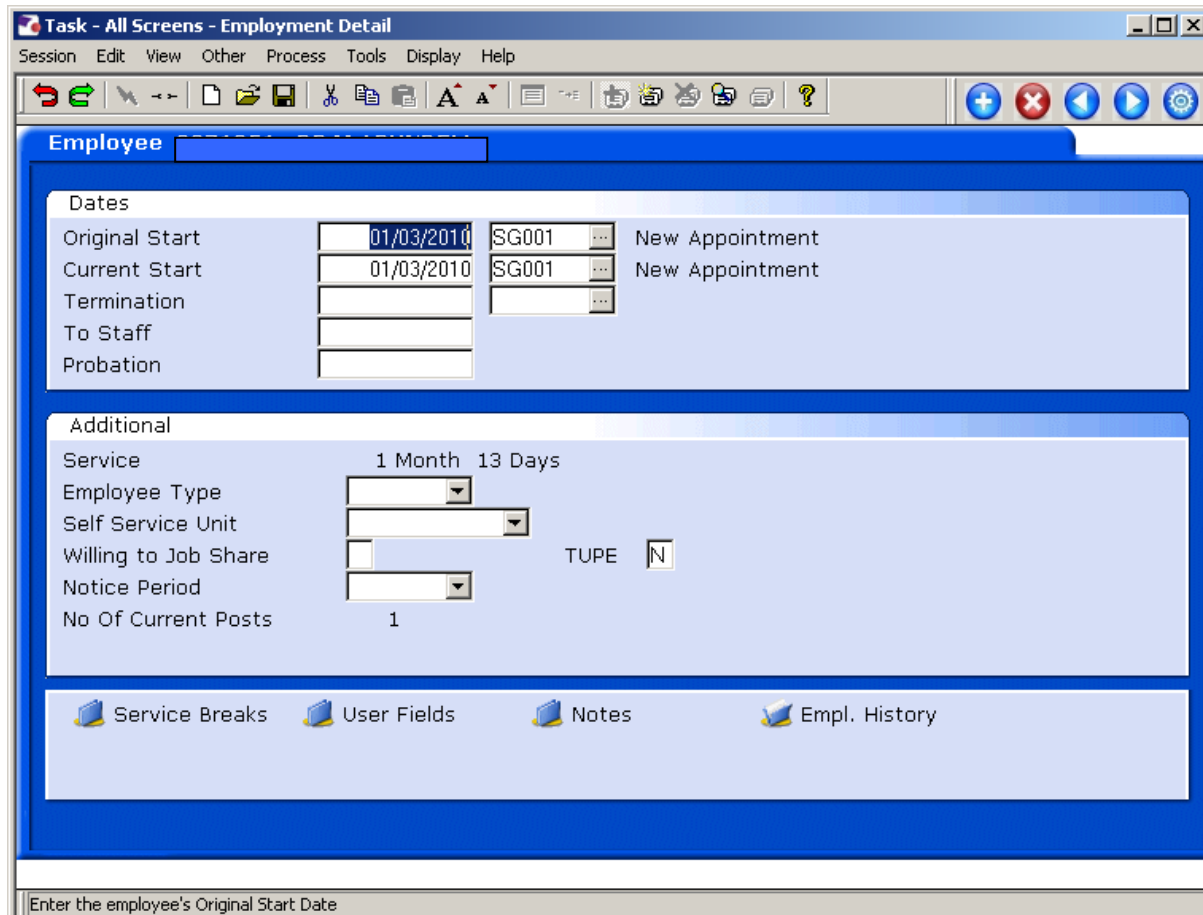
- 2.19 If the message above appears, then click **OK**

📘 The incorrect **PSUB** group that had been entered previously has now been overwritten by the correct information relating to the correct **PSUB** group and the new start date.

- 2.20 Click on **Next** 

3 Employment Detail Data Entry Screen

- ① You now need to amend the **Current Start date** in the **Employment Detail** screen. If this post is the person's first ever post at the University then you will need to change the **Original Start date** as well.




The screenshot shows the 'Task - All Screens - Employment Detail' window. The 'Employee' field is at the top. Below it, the 'Dates' section contains fields for 'Original Start', 'Current Start', 'Termination', 'To Staff', and 'Probation'. The 'Current Start' field is highlighted with a blue border and contains the date '01/03/2010'. To the right of the 'Original Start' and 'Current Start' fields are dropdown menus showing 'SG001' and 'New Appointment'. Below the 'Dates' section is the 'Additional' section, which includes fields for 'Service' (set to '1 Month 13 Days'), 'Employee Type', 'Self Service Unit', 'Willing to Job Share', 'Notice Period', and 'No Of Current Posts' (set to '1'). There is also a 'TUPE' checkbox. At the bottom of the window, there are four icons: 'Service Breaks', 'User Fields', 'Notes', and 'Empl. History'. A status bar at the very bottom says 'Enter the employee's Original Start Date'.


3.1 Click in the **Current Start** field and Delete the date.

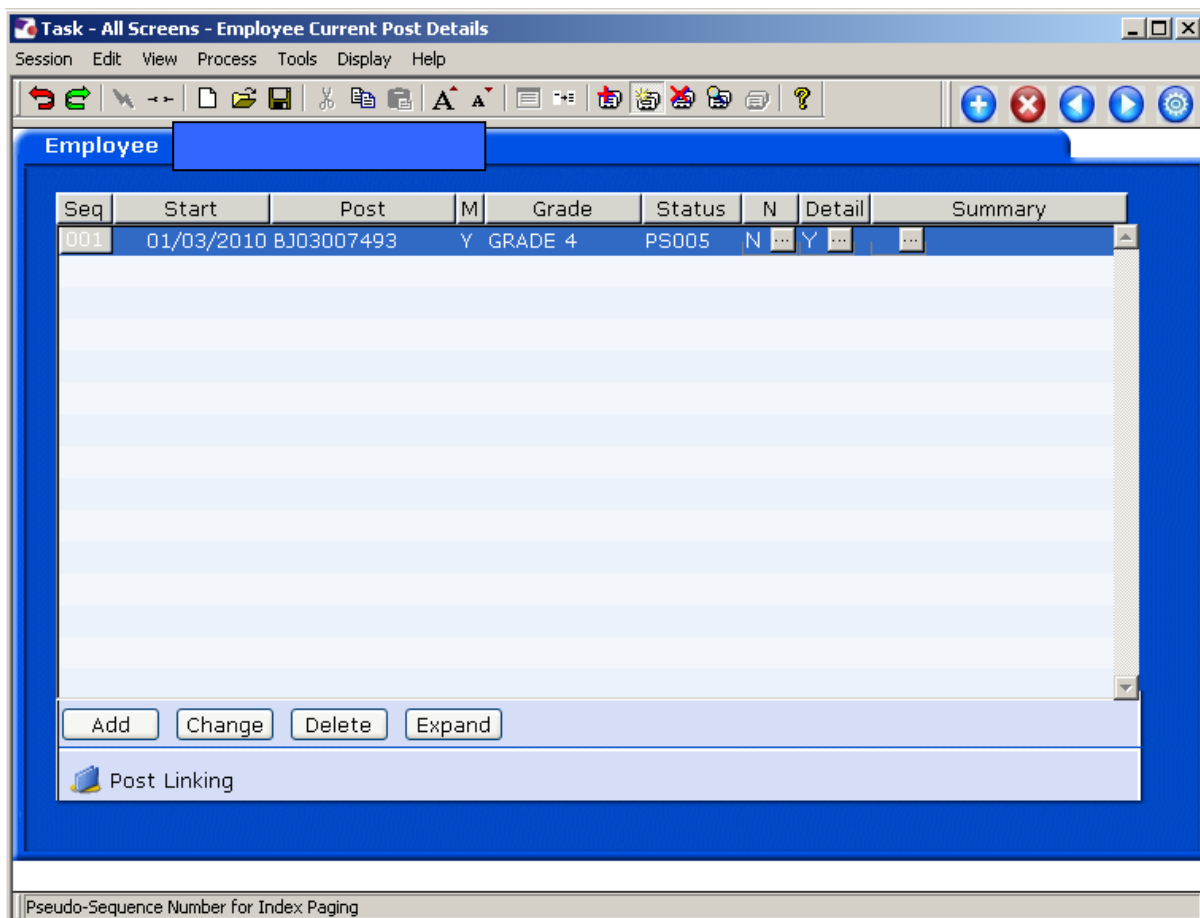
3.2 Enter the correct date in the **Current Start** field.

- ① If the **Original Start** date is the same as the **current start** date you will need to do this in the **Original start** date field too.

Click on  to move to the next data entry screen.

4 The Current Post Holding Data Entry Screen

-  You will now need to make a note of all the details of the particular post you are wishing to change the start date of, then delete that line of information as it contains the incorrect start date (and this cannot be edited). You will then need to add the line again with the new correct start date.



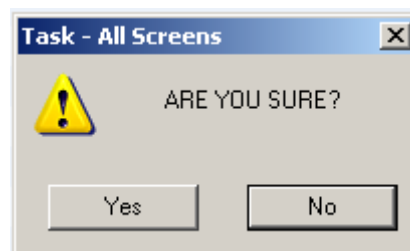
Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/03/2010	BJ03007493	Y	GRADE 4	PS005	N	Y	...

Buttons: Add, Change, Delete, Expand

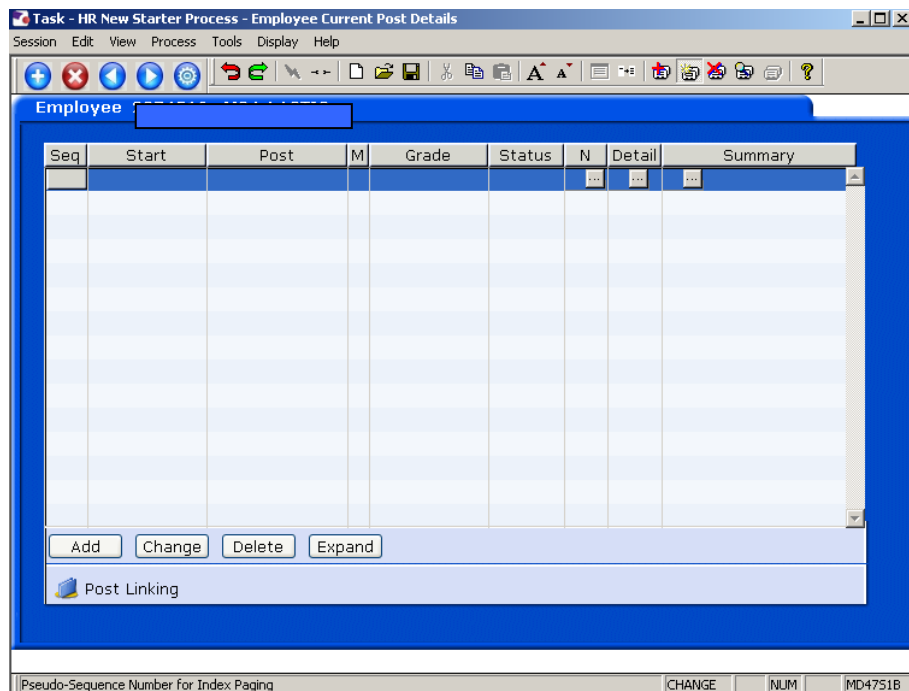
Post Linking




Pseudo-Sequence Number for Index Paging

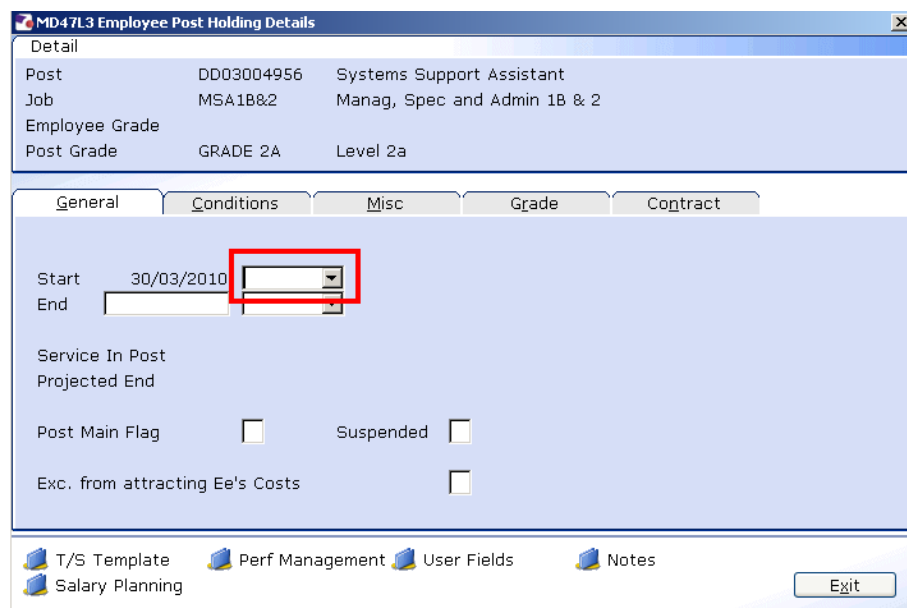
- 4.1 Click on the **Delete** button.



- 4.2 The above message will appear. Click on **Yes** to confirm the deletion.



- 4.3 Click on **Add** to enter the Current Post Holding data for the employee.
- 4.4 Type in the **Start Date**.
 -  If the employee is full time the start date must be the Commencement Date on the HR Form
 -  Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 4.5 Press **ENTER**.
- 4.6 Type the Post Number into the **Post** field. (The Post number will be located on the HR Form)
- 4.7 Press **Enter**.
 -  If you see a dialog box warning that the FTE is being exceeded click on **Exit**.
- 4.8 Click in the **Details** field and **Window in**.



MD47L3 Employee Post Holding Details

Detail

Post	DD03004956	Systems Support Assistant
Job	MSA1B&2	Manag, Spec and Admin 1B & 2
Employee Grade		
Post Grade	GRADE 2A	Level 2a

General Conditions Misc Grade Contract

Start 30/03/2010 ▼

End ▼

Service In Post
Projected End

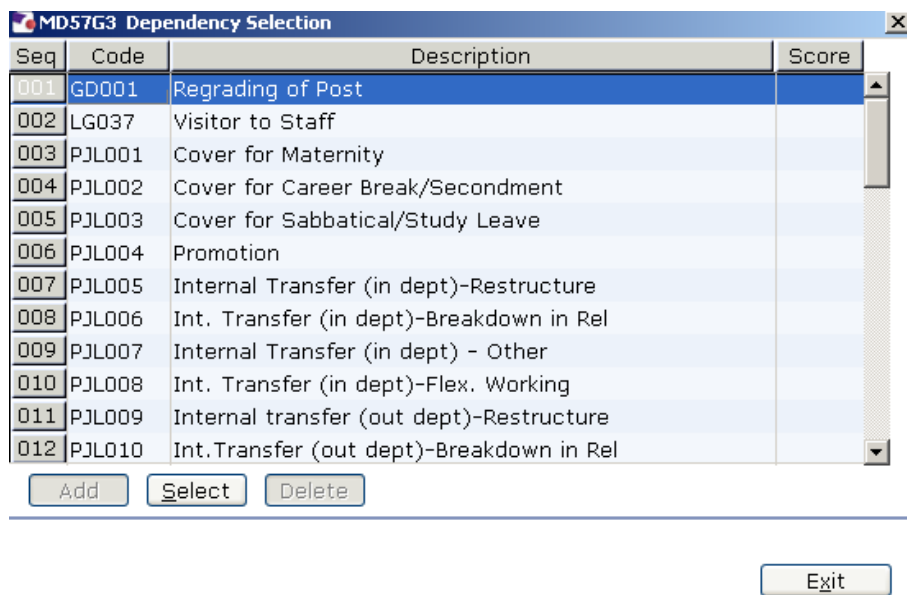
Post Main Flag ☐ Suspended ☐

Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes
Salary Planning

Exit

- 4.9 Click on the drop down list in the highlighted field. A list of reasons will be displayed:



MD57G3 Dependency Selection

Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	LG037	Visitor to Staff	
003	PJL001	Cover for Maternity	
004	PJL002	Cover for Career Break/Secondment	
005	PJL003	Cover for Sabbatical/Study Leave	
006	PJL004	Promotion	
007	PJL005	Internal Transfer (in dept)-Restructure	
008	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
009	PJL007	Internal Transfer (in dept) - Other	
010	PJL008	Int. Transfer (in dept)-Flex. Working	
011	PJL009	Internal transfer (out dept)-Restructure	
012	PJL010	Int.Transfer (out dept)-Breakdown in Rel	

Add Select Delete

Exit

- 4.10 Select the appropriate reason for this New Starter. In most cases this will be **SG001- New Appointment**.

☛ You will have to enter the Reason again in a later field – you must be consistent.

- 4.11 Type **Y** in the **Post Main Flag** field if this is the employee's main post.

- 4.12 Press the **Enter** key to move through the remaining fields and on to the **Conditions** tab.

4.13 Window in to the Service Cond ID field

- 4.14 Click on **Add** and press **Enter** three times to pull through the Service Conditions.
- 4.15 Please ensure that the correct service condition is showing as this impacts several other areas of the system, as well as reports, and can also impact whether or not the person will get paid. If you are unsure, please check with a colleague.
- 4.16 Click **Exit**.
- 4.17 **Window in the Position Status Field.** The following screen will appear:

MD55G30 Employee Position Status

General

Post DD03004956 Systems Support Assistant
From 30/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	30/03/2010				

Add Change Delete Expand

Exit

4.18 Click on **Add**.

4.19 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

MD55G30 Employee Position Status

General

Post DD03004956 Systems Support Assistant
From 30/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	30/03/2010				

Add Change Delete Expand

Exit

4.20 Select the relevant **Position Status** from the list.

- ☛ Please ensure you select the correct position status as what you enter here impacts several other areas of the system, as well as reports, and can also impact the person's pay. If you are unsure, please check with a colleague.

4.21 Press **Enter** to move through the remaining fields and click **Exit**.

4.22 **Window in** to the **Wk Pattern** field. The following screen will appear:

MD47L2 Employee Work Patterns

General

Post DD03004956 Systems Support Assistant
From 30/03/2010 To

Seq	Start Date	End Date	Work Pattern	Description	S	Start Day	Reason
					...		

Add Change Delete Expand


Exit

4.23 Click on **Add** and enter through the fields.

4.24 If the correct work pattern has not defaulted into the **Work Pattern** field, select the appropriate work pattern from the **Work Pattern** drop down list.

Work Pattern	Description	S
36AMTWTF		...
Code	Description	
35MTWF	S0M8.75T8.75W8.75T0F8.75S0	
35MTWT	S0M8.75T8.75W8.75T8.75F0S0	
35MTWTF	S0M7T7W7T7F7S0	
35SMTTS	S7M7T7W0T7F0S7	
36.5AMTWTF	S0M7.5T7.5W7.5T7.5F6.5S0	
36.5CMTWTF	S0M7.5T7.5W7T7.5F7S0	
36AMTWTF	S0M7.2T7.2W7.2T7.2F7.2S0	
36BMTWTF	S0M7T7W7T7F8S0	

4.25 Scroll down the list and click on the correct pattern

 The **Descriptions** indicate the hours that are worked each day within that pattern e.g. S0M6T6W6T6F6S0 (this pattern is 6 hrs a day Mon – Fri), all patterns start on Sunday and end on Saturday.

4.26 The **Start Day** field refers to which day of the week the employee's Commencement Date is (check their HR Form):

Start Day	Day Number
Sunday	1
Monday	2
Tuesday	3
Wednesday	4
Thursday	5

Friday 6

Saturday 7

4.27 Enter the appropriate number into the **Start Day** field (e.g. for a Monday you should enter “2”)

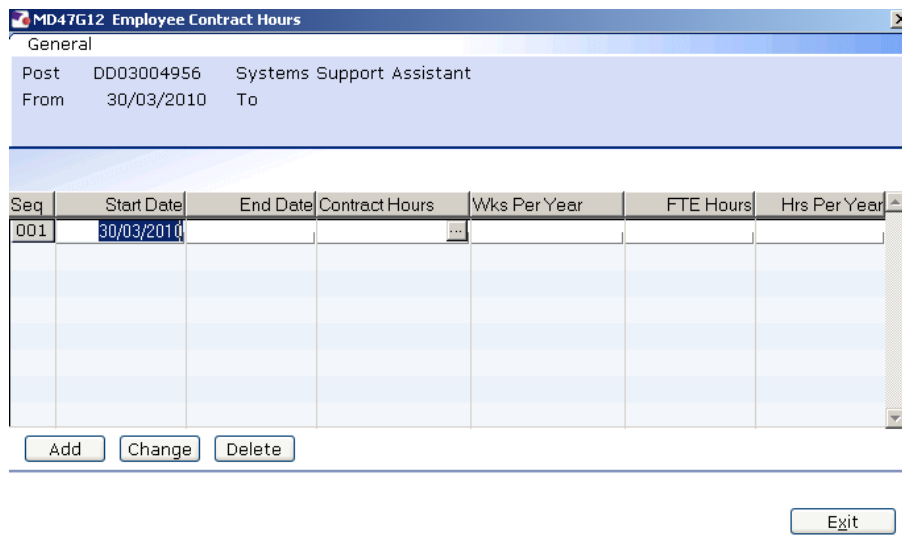
- ☛ Please note that although the vast majority of work patterns are 7 day work patterns, there are a few which are longer (14 days, 21 days and even a few 56 day patterns) – in these cases you will need to work out not only which day of the week the person starts on (e.g. Monday) but also which Monday of their 2 week, 3 week, etc. pattern this is – i.e. are they starting on the first Monday of the pattern (day 2) or the second Monday of the pattern (day 9) etc.

4.28 **Window in** to the **Reason** field and select the reason for the appointment.

- ☛ The reason **MUST** be the same as was entered at instruction previously

4.29 Press **Enter** and **Exit**.

4.30 **Window in** to the **Contract Hours** field.



Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	30/03/2010					

Buttons: Add, Change, Delete, Exit

4.31 Click on **Add** to bring through the **Start Date** and press **Enter** twice.

4.32 In the **Contract Hours** field, enter the weekly working hours.

4.33 Press **Enter**.

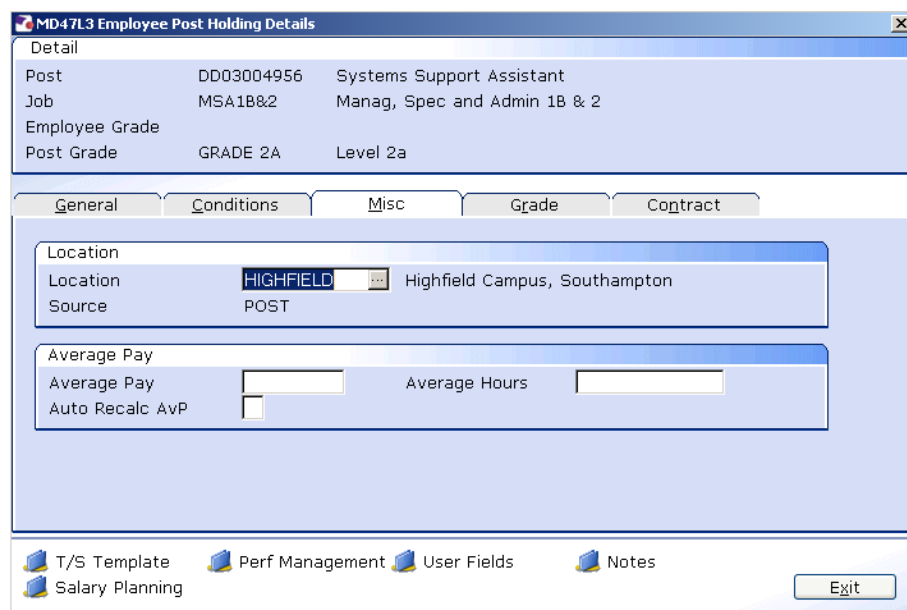
4.34 If the employee works less than the whole 52.143 weeks per year, enter the number of weeks per year that they will be working (e.g. “44”)

- 📘 If the employee is working a Full year (52.143 weeks), then leave the **Wks Per Year** field blank.

- 4.35 Press **Enter**.
- 4.36 In the **FTE Hours** field enter the number of hours per week that a Full Time Equivalent would work in this post. For example, although someone in a MSA4+ post might only be working 17.5 hours per week the post itself may well have an FTE of 35 hours, in which case you would enter this in the FTE Hours field.

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	30/03/2010		17.50			35.00
002			...			

- 4.37 Click on to the **Misc** tab.



MD47L3 Employee Post Holding Details

Detail

Post DD03004956 Systems Support Assistant
 Job MSA1B&2 Manag, Spec and Admin 1B & 2
 Employee Grade
 Post Grade GRADE 2A Level 2a

General Conditions **Misc** Grade Contract

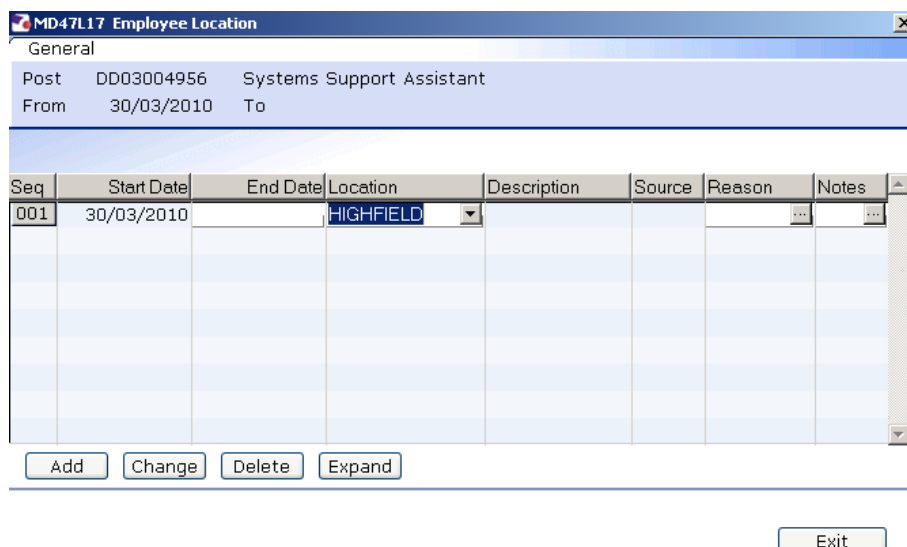
Location
 Location HIGHFIELD Highfield Campus, Southampton
 Source POST

Average Pay
 Average Pay Average Hours
 Auto Recalc AvP

T/S Template Perf Management User Fields Notes
 Salary Planning

Exit

- 4.38 Window in to the **Location** field.



MD47L17 Employee Location

General

Post DD03004956 Systems Support Assistant
 From 30/03/2010 To

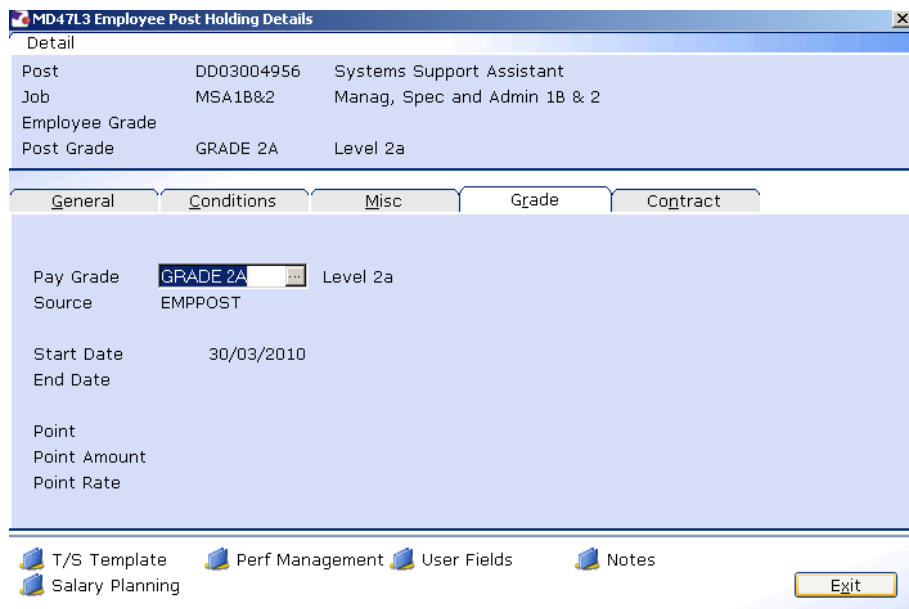
Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	30/03/2010		HIGHFIELD				

Add Change Delete Expand

Exit

- 4.39 Click on **Add** and press **Enter** twice.

- 4.40 Select the location from the **Location** field drop down list.
- 4.41 Press **Enter**.
- 4.42 **Window in** to the **Reason** field and select the reason for the appointment.
- ☛ The reason **MUST** be the same as was entered at instruction 4.10.
 - ☛ Please note that this information must be entered otherwise the employee will not be picked up on the HR reports.
- 4.43 Press **Enter**.
- 4.44 Click **Exit**.
- 4.45 Click on the **Grade** tab.



Detail		
Post	DD03004956	Systems Support Assistant
Job	MSA1B&2	Manag, Spec and Admin 1B & 2
Employee Grade		
Post Grade	GRADE 2A	Level 2a

General Conditions Misc Grade Contract

Pay Grade **GRADE 2A** Level 2a

Source EMPPOST

Start Date 30/03/2010

End Date

Point

Point Amount

Point Rate

T/S Template Perf Management User Fields Notes

Salary Planning Exit

- 4.46 Window in to the **Pay Grade** field.

MD47G41 Employee Spinal Grade History

General

Post DD03004956 Systems Support Assistant
From 30/03/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade	Point N
001	30/03/2010		GRADE 2A		POSTPL	POSTGD	N

Point Rate Enh.Rate Point Amount
Override Date Override Reason
Override Step Press WINDOW for Post Grade History
Bar Point Current Bar Point 12

Add Change Delete Expand

Exit

Pseudo-Sequence Number for Index Paging CHANGE NUM MD47L3

- 4.47 The **Grade** will pull through from the post, however if this is wrong it can be overwritten in this screen.
- 4.48 If this is incorrect or if the employee is on a **Off Scale Salary** or works above the standard hours for their grade (paid on **Hourly Rate Grades** e.g. Nursery staff, Halls Cleaning, Security), window into the **Grade** field.

MD35G3 Grade Selection

Selection

Grade
Obsolete Date Search

Seq	Grade	Description
00001	AMCF	Research Consultant Fellow (Hon Consult)
00002	AMCR	Reader (Honorary Consultant)
00003	AMCS	Senior Lecturer (Honorary Consultant)
00004	AMDT	Dental Clinical Tutors (Hon Consult)
00005	AMNL	Clinical Lecturer
00006	AMNR	Clinical Reader
00007	AMNS	Clinical Senior Lecturer
00008	AMPL	Clinical Psychologist
00009	AMPR	Professor (Honorary Consultant)

Add Select Delete

Exit

- 4.49 Scroll down the list and select the correct grade or click on the off scale equivalent grade (see examples below of **Off Scale Grades** and **Hourly Rate Grades**).

Off Scale Grades

Grade	<input type="text"/>	Search
Obsolete Date	<input type="text"/>	

Seq	Grade	Description
00055	OS GRADE1B	Off Scale Level 1B
00056	OS GRADE2A	Off Scale Level 2A
00057	OS GRADE2B	Off Scale Level 2B
00058	OS GRADE3	Off Scale Level 3
00059	OS GRADE4	Off Scale Level 4
00060	OS GRADE5	Off Scale Level 5
00061	OS GRADE6	Off Scale Level 6
00062	OS GRADE7	Off Scale Level 7
00063	OS PROF Z2	Off Scale Professorial Zone 2

Hourly Rate Grades

Seq	Grade	Description
00028	GRD1B35.5H	Grade 1B 35.5 Hours
00029	GRD2A 36H	Grade 2a 36hours
00030	GRD2A35.5H	Grade 2a 35.5 Hours
00031	GRD2B 36H	Grade 2b 36 hours
00032	GRD2B35.5H	Grade 2b 35.5hours
00033	GRD3 35H	Grade 3 35hours
00034	MC51	MC51
00035	MC52	MC52
00036	MC53	MC53

4.50 Click on the appropriate Grade or Grade Equivalent for this employee.


4.51 Press **Enter**.

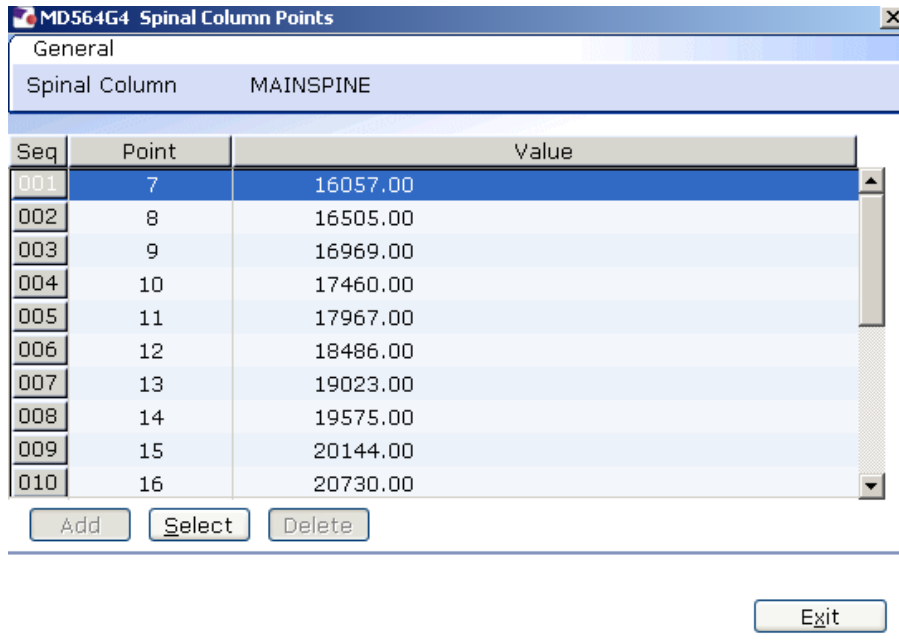
4.52 In the **Reason** field, click on the drop down and scroll down the list and select the reason for the appointment.

☛ The reason **MUST** be the same as was entered at instruction previously

Seq	Code	Description	Score
001	GD001	Regrading of Post	
002	GD002	Additional Increment	
003	GD003	HRZ Increment	
004	GD004	Annual Increment	
005	GD005	Protected Ann. Inc. Progress (Job Match)	
006	GD006	Cost of Living Award	
007	GD007	National Insurance Amendments	
008	GD008	No Cost of Living	
009	GD009	Senior Officer Consolidation	
010	LG0037	Retirement	
011	LG037	Visitor to Staff	
012	PJL001	Cover for Maternity	

4.53 **Window in** to the **Point** field and select the **Salary Point** for this employee.

 You will not need to select a point if the employee is paid an **Off Scale Salary**, in which case leave this field blank



MD564G4 Spinal Column Points

General

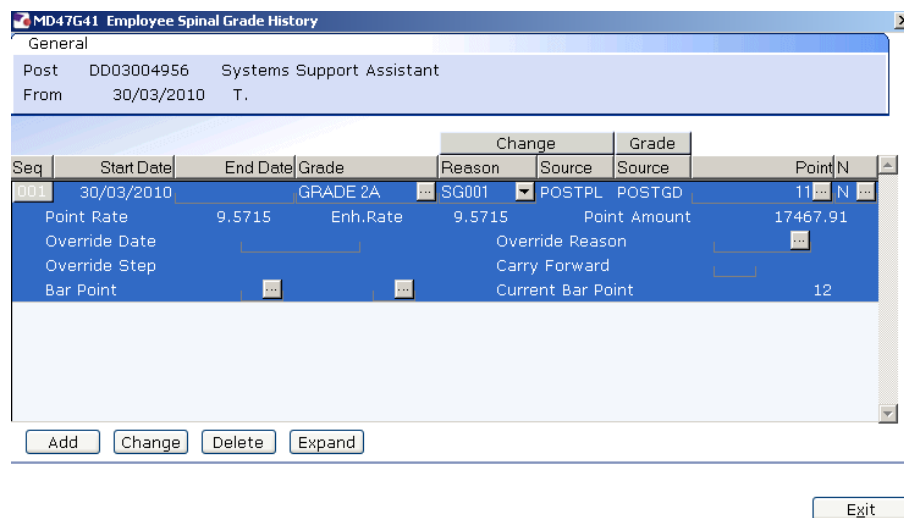
Spinal Column MAINSPINE

Seq	Point	Value
001	7	16057.00
002	8	16505.00
003	9	16969.00
004	10	17460.00
005	11	17967.00
006	12	18486.00
007	13	19023.00
008	14	19575.00
009	15	20144.00
010	16	20730.00

Add Select Delete

Exit

- ☛ If the employee is on a point within the **HRZs** the bar point will have to be changed first before the point can be selected.
- ☛ Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.



MD47G41 Employee Spinal Grade History

General

Post DD03004956 Systems Support Assistant

From 30/03/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Source	Point	N
001	30/03/2010		GRADE 2A	SG001	POSTPL	POSTGD	11	N
Point Rate		9.5715	Enh.Rate	9.5715	Point Amount		17467.91	
Override Date			Override Reason					
Override Step			Carry Forward					
Bar Point			Current Bar Point				12	

Add Change Delete Expand

Exit

Annual increments:

Note: For most service conditions, the system will automatically award an increment on the next 1st August unless there is an alternative date entered in the “Override date” field (or if the person has already reached their bar point).

A person is only entitled to receive an extra increment if they have been in post at least 6 months by the time the 1st August comes round.

- ☛ Please note however that there are some service conditions where the above is not applicable:

Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3

For staff in posts under these service conditions please follow the instructions in the blue box below.

So, if you are entering a new starter to the University who is starting between 1st August and 1st February then you can safely leave the “Override date” field blank as they will have been in post for 6 months or more by 1st August and should receive a normal increment, which they will automatically (unless they have already reached their current bar point).

Any new starter who will not have been in post for more than 6 months by 1st August (i.e. anyone starting after 1st February of that year) should not receive an increment in August of that year. In such cases, you should:

- Click in the “**Override Date**” field and enter the appropriate date for when they should next get an increment (typically the 1st of August of the following year)
- Click on the “Override Reason” field and select “OR006” (Deferred increment due to start date).
- Press **Enter**
- Ensure that a “**1**” is entered in the “**Override Step**” field (so that they will only receive one extra increment).
- Ensure that a “**N**” is entered in the “**Carry Forward**” field – this will mean that in subsequent years the person will receive an increment on the standard date for that Service Condition (typically the 1st August).

- ☛ Please note: If you need to add an increment grade row to a record and there is already a future dated grade row which is scheduled to begin after the date of the increment you will need to manually remove and re-enter this.

For example, if in June you were instructed to add an additional increment to someone's record from 1st August but notice that there is already a grade row starting on 1st September, you would need to:

- copy down the details of this future dated grade row, then delete the row
 - add in the increment row from 1st August, then
 - re-add the row starting 1st September.
- ☛ If you do ever need to delete and then re-add a grade row, do ensure that you copy the details exactly.

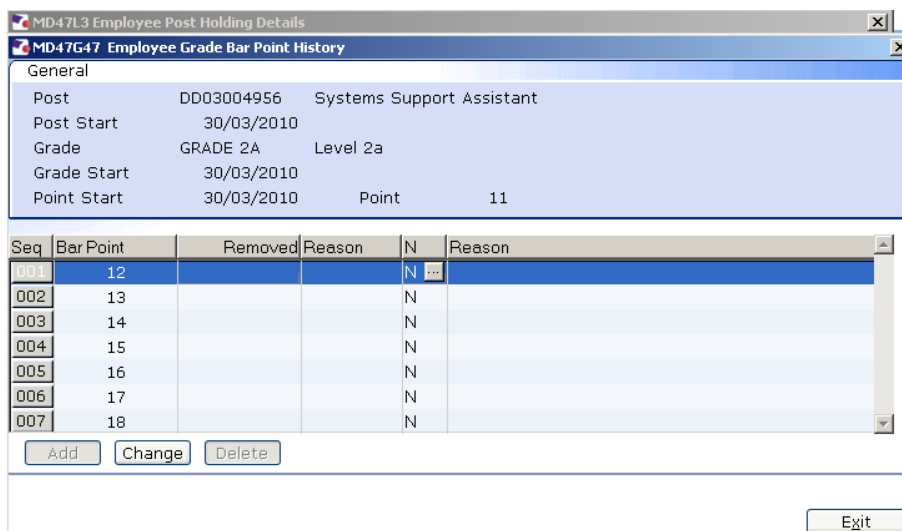
If you have been instructed that a new starter should receive their additional increments on the date of their anniversary – or on a particular date which isn't the standard 1st August – then you should:

- Click in the “**Override Date**” field and enter the appropriate date (such as their anniversary date or other specified date)
- Click on the “**Override Reason**” field and select “**OR001**” (Increment on anniversary) or another relevant reason code.
- Press **Enter**
- Ensure that a “**1**” is entered in the “**Override Step**” field (so that they will only receive one extra increment).
- Ensure that a “**Y**” is entered in the “**Carry Forward**” field – this will mean that in subsequent years the person will receive additional increments on the date you have entered above.

Please note that non-standard incremental progression is only applicable in very limited instances. These are **Clinical Consultants, Professorial staff, Level 7 non-professorial staff, ERE staff appointed prior to 01/10/2004 protected on level 3**

4.54 If you have been instructed that the employee is to be entered on a point that is within the HRZ's click in the **Bar Point** field.

- ☛ Please note, you should not move anyone into the HRZ area unless this has been specifically agreed by the School / Department in consultation with HR.



Seq	Bar Point	Removed	Reason	N	Reason
001	12			N	
002	13			N	
003	14			N	
004	15			N	
005	16			N	
006	17			N	
007	18			N	

4.55 Click on the current bar point at the top of the table and click in the **Removed** field.

4.56 Enter the **date** that the bar point has been removed and press **ENTER** three times.

- ☛ Dates **MUST** be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975

4.57 Repeat this process for each bar point that is to be removed. The new Bar Point will be the next point without a Removed date.

4.58 Click on **Exit**.

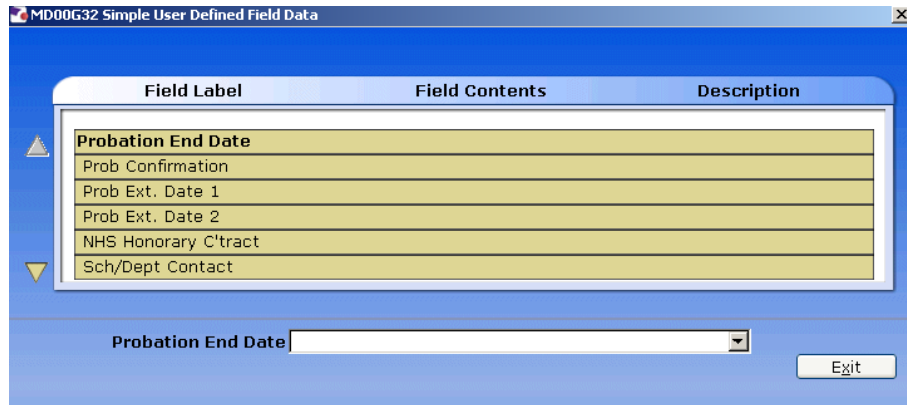
4.59 Press **Enter** to update **Current Bar point**. You can now go back to the **Point** field and enter a point within the HRZ.

Please note: if you are ever entering a backdated grade row which will precede a cost of living increase you will need to:

- add a grade row from the start of the new post until the end of the old rate
- then add a new row from the start date of the latest cost of living increase

4.60 Press **Enter** to move through the remaining fields and click **Exit**.

4.61 Click on **User Fields**.




Field Label	Field Contents	Description
Probation End Date		
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Probation End Date

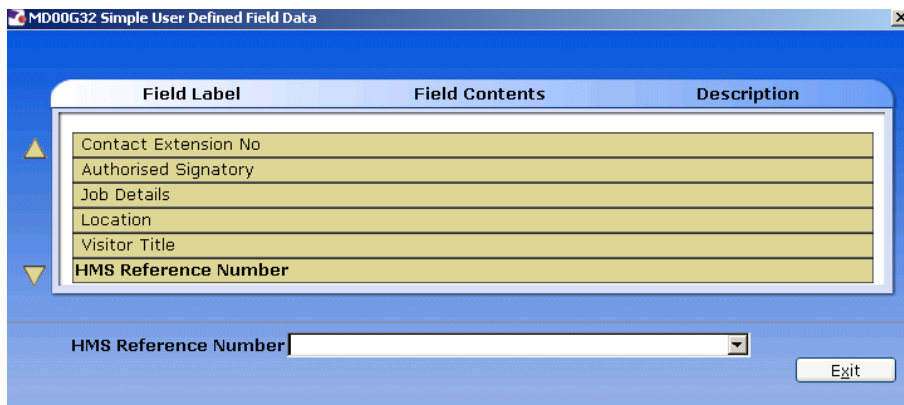
Exit

4.62 Type in the **Probation End Date**.

- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

4.63 Using the scroll buttons , scroll down to the bottom of the screen

4.64 Click on **HMS Reference Number**



Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

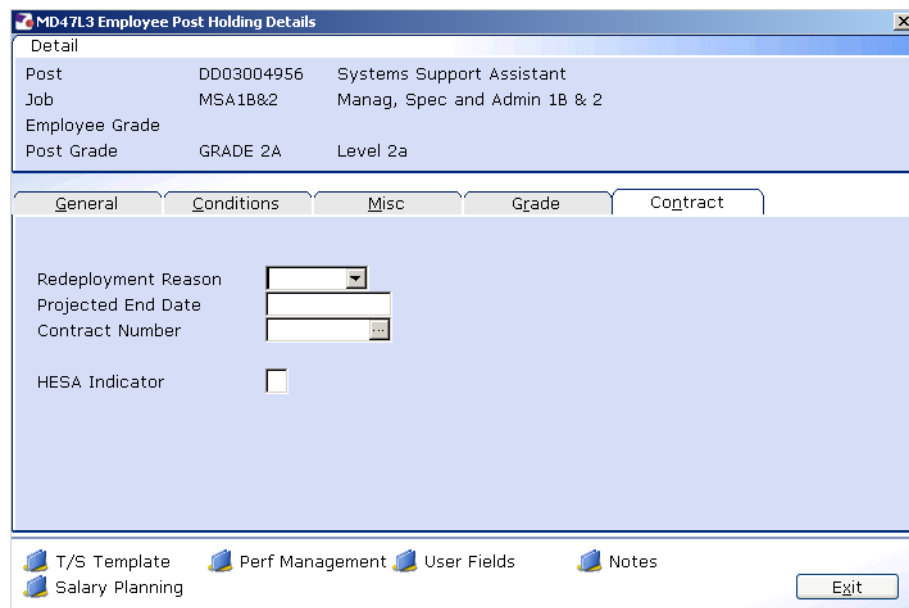
HMS Reference Number

Exit

4.65 In the **HMS Reference Number** field enter the HMS Ref. No for this post.

4.66 Press **ENTER** and click on **Exit**.

4.67 Click on the **Contract** tab.



MD47L3 Employee Post Holding Details

Detail

Post	DD03004956	Systems Support Assistant
Job	MSA1B&2	Manag, Spec and Admin 1B & 2
Employee Grade		
Post Grade	GRADE 2A	Level 2a

General Conditions Misc Grade Contract

Redeployment Reason

Projected End Date


Contract Number

HESA Indicator ☐

T/S Template Perf Management User Fields Notes

Salary Planning

 The **Redeployment Reason** field is not used.

- 4.68 If the employee is on a Fixed Term Contract enter a **Projected End Date**.
- 4.69 If the employee is an FTC, click in the **Contract Number** field, window in and select the contract entered previously on the **Contract Details** Screen.
- 4.70 If the post is HESA returnable type **Y** into the **HESA Indicator** field. (All Main Payroll staff will have a **Y** in this field)
- 4.71 Press **ENTER** and click on **Exit**.
- 4.72 Click on  to move to the next data entry screen.

5 Post Holding Costing data entry screen

Task - All Screens - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee

General

Post

Start Date End Date

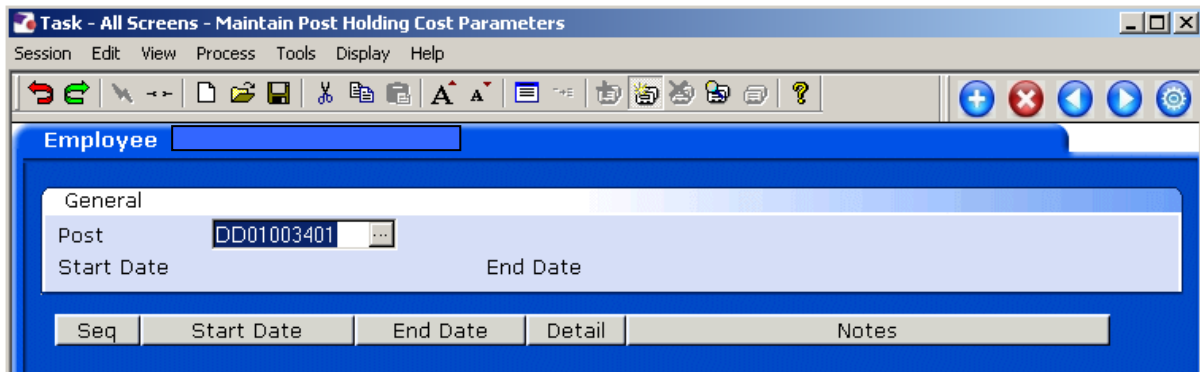
Seq	Start Date	End Date	Detail	Notes

Press WINDOW to select required Post

5.1 Window into the **Post** field.

[illegible]

5.2 Click on the post.



Task - All Screens - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee DD01003401

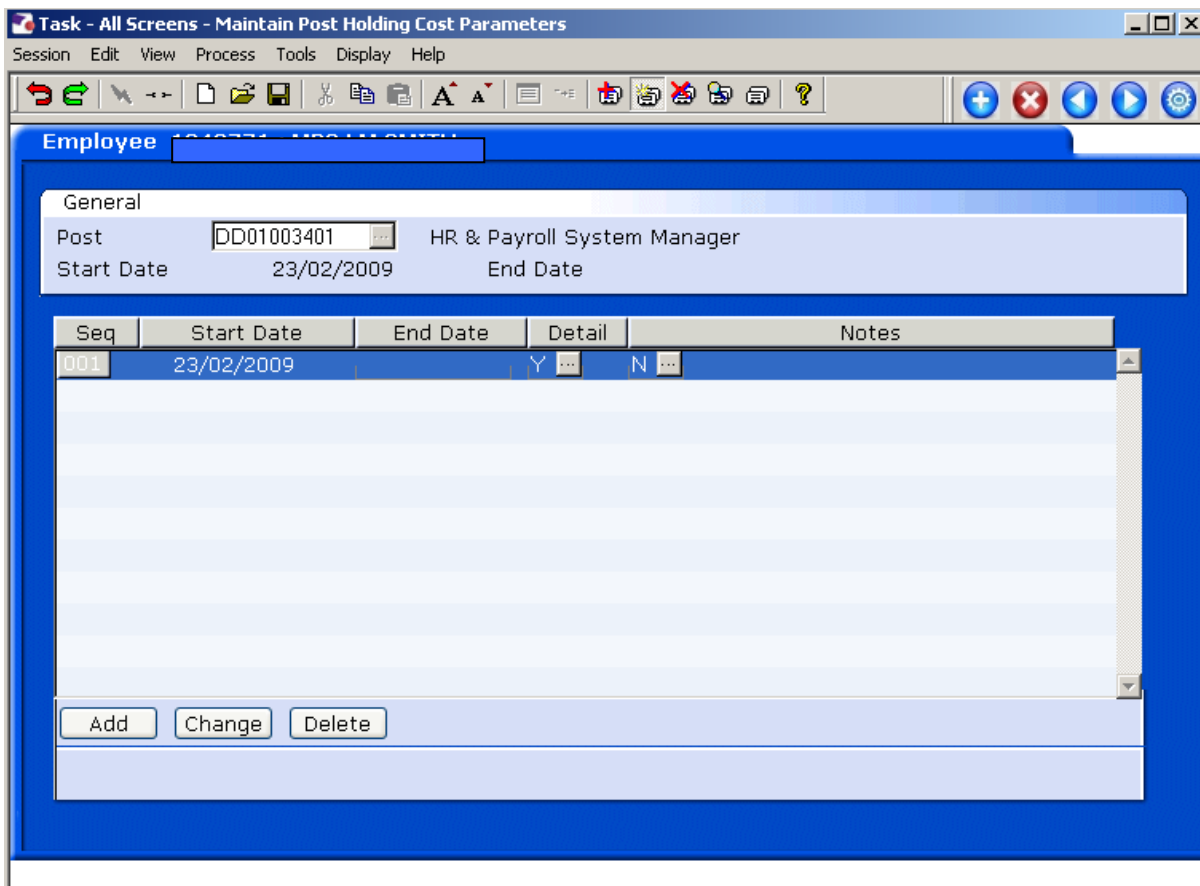
General

Post DD01003401 ...

Start Date End Date

Seq	Start Date	End Date	Detail	Notes
-----	------------	----------	--------	-------

5.3 Press **Enter**.



Task - All Screens - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee 1010771 - HR & PAYROLL

General

Post DD01003401 ... HR & Payroll System Manager

Start Date 23/02/2009 End Date

Seq	Start Date	End Date	Detail	Notes
001	23/02/2009		Y ...	N ...

Add Change Delete

5.4 Highlight the line with the incorrect start date in it and click on the **Delete** button

5.5 Click on **Add** Add

5.6 In the **Start Date** field enter the correct date.

5.7 Press **Enter**.

MD49G12 Costing Details

Seq	Cost Centre	Ee's %	Er's %
001	506201101	100.00	100.00

Add Change Delete Expand

Exit



5.10 Enter the **Cost Centre** number (Sub Project Code- starts with 5) that this post is to be paid from. Press **Enter**.

5.12 In the **Er's%** field enter the percentage that this post is to be paid from this cost centre (e.g. 100%)

5.14 If the post is to be paid from more than 1 cost centre, add another row of information.

- 💣 Please ensure that the Er's Column adds up to 100%.

Exit

[illegible]

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Task - All Screens - Employee Pay Elements - Detail

Session

Edit

View

Other

Process

Tools

Display

Help

Employee

Seq	Post	Code	Desc	E	Start	Period Amt	A	D	M	S
001	DD01003401	1000	Basic Pay		23/02/2009	3635.17				N

Add

Change

Delete

Expand

Currency

Pseudo-Sequence Number for Index Paging

- Page 36 of 41

7.2 Click on **Add** 

7.3 **Window in** to the **Pay Element** field and **Enter** through all the fields to display the list of pay elements.


MD00G6N Pay Element Selection

General

Partial Element ☐ Pay/Deduction ☐ Type ☐

Seq	Code	P or D	Type	Short Desc	Long Description
0001	0001	D	N	Tax Paid	Tax Paid
0002	0002	D	N	Tax Rebate	Tax Rebate Withheld
0003	0010	D	NI	NI C/I	NI Contracted In
0004	0011	D	NI	NI A Saved	Non-Directors A Rate NI
0005	0020	D	NI	NI Wfe C/I	NI Wife Contracted In
0006	0021	D	NI	NI B Saved	Non-Directors B Rate NI
0007	0025	D	NI	NI CI Def.	NI Contracted in (Deferred)
0008	0026	D	NI	NI C Saved	Non-Directors C Rate NI
0009	0030	D	NI	NI Pen C/I	NI Pensioner Contracted In
0010	0031	D	NI	NI C Saved	Non-Directors C Rate NI
0011	0035	D	NI	NI CO Def.	NI Contracted out (COSR) Deferred

- 7.4 Select the required pay element (Code **1000** is **Basic Pay**, codes 0001 – 0999 are standard ResourceLink pay elements, 1000+ are UoS specific). The following data entry screen is displayed:

 If the employee is to be paid a salary of a non spinal amount you will need to enter the PE **2000-Basic Pay Non Spinal** and enter an amount, rather than using PE 1000.

MD48G81 'N' Type Fix Pay Element Detail

Pay Element

Pay Element ID Basic Pay

Post

Start Date Reason

End Date

Employees

Amount 2nd Currency Table ID ☐

Arrears Adjustment

Calc. Arrears


Cost Code

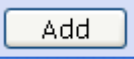

Employers

Amount 2nd Currency Table ID ☐


Arrears

Cost Code

 Balance Detail

-
- 7.5 **Window in** to the **Post** field. A list of the employee's posts is displayed. Select the required post this PE is to be attached to.
- 7.6 Press **Enter** to move through the **Start date**.
- 7.7 **Window in** to the **Reason** field and select the reason for the PE.
- ☛ The reason **MUST** be the same as was entered at Post Holding.
- 7.8 Press **Enter** through the **End Date**.
- 7.9 If the PE you are entering requires a specific amount (e.g. 2000-Non spinal Salary) to be attached to it, enter this in the **Amount** field. You will need to enter the **annual** amount, the system will then divide this by 12. For PE 1000 – Basic Pay this is not required.
- 7.10 Press **Enter** to move through the remaining fields.
- 7.11 The Fixed PE Screen will be updated.
- 7.12 Click on **Add**  and repeat this process for each Fixed PE the employee is to continuously receive each month. E.g. Market Supplements.
- 7.13 Click on Save  to save the changes.

8 Standard letters

-  If you need to produce any paperwork after making the change to the person's start date, then you will now need to go into the relevant task (such as the **New Starter** task and press **Save**, which will then bring up the list of Standard Letters available for you to print.

9 Notify Payroll of the change you have made

- It you have just made a change to a post that the person has already started in then it is important that you let Payroll know what you have done so that they can check the Fixed Pay Elements and look into whether the person's pay needs to be adjusted.