

This work instruction was last updated: 29 April 2010

Employee to Visitor

This Work Instruction describes how you would make an employee who is leaving their main post a visitor and uses both the **Leaver** and **Rejoiner** tasks on ResourceLink. Follow this instruction for permanent Employees who will be leaving and returning as Visitors.

Firstly complete the Leaver task to end the person as an employee.

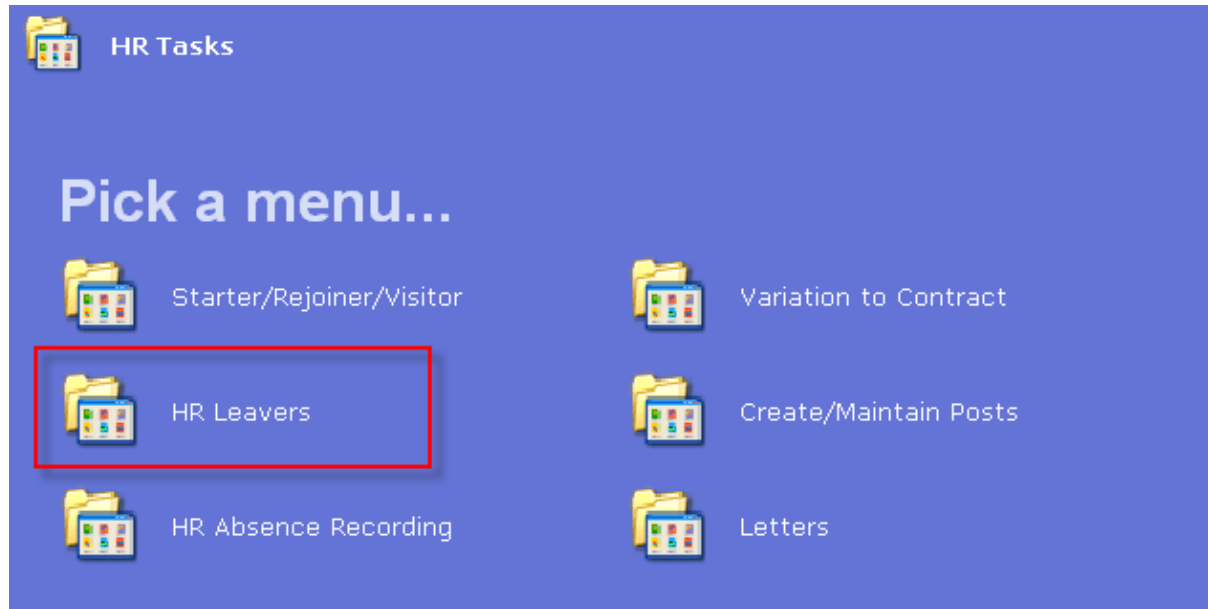
Secondly complete the Visitor task to make them a Visitor.

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

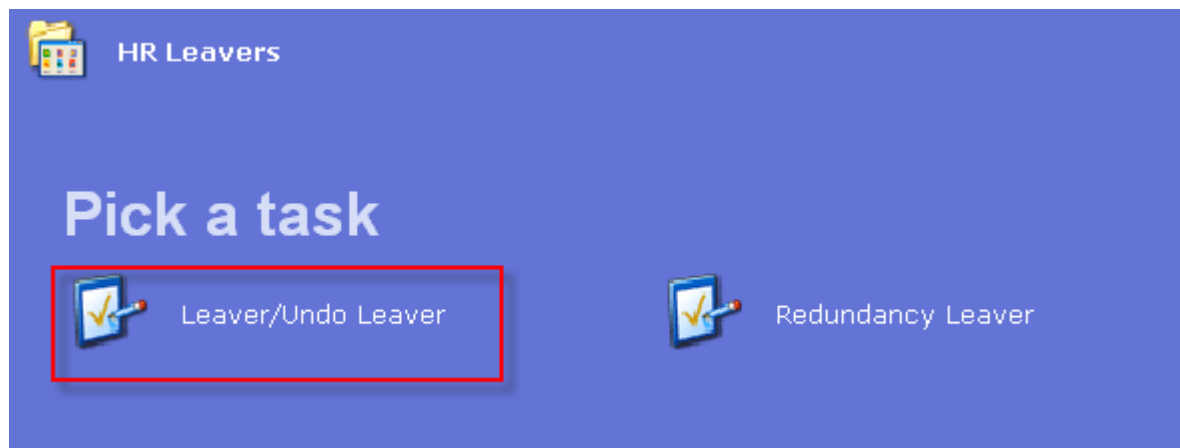
- | | |
|----|--|
| 1 | Entering a Leaver on ResourceLink |
| 2 | Personal Details data entry screen |
| 3 | Employment Detail data entry screen |
| 4 | Post holding History data entry screen |
| 5 | Current Post Holding data entry screen |
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1 Entering a Leaver on ResourceLink

1.1 HR Tasks > HR Leavers



1.2 HR Leavers > Leaver Process



2 Personal Details data entry screen

Task - Leaver/Undo Leaver - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee

Title Details

Legislation Type

Surname

Title

First Forename

Other Forenames

Prev. Surname

Known As

Honours

Generation

Personal Details

Gender F

Date of Birth 28/03/1979 Age: 31 Years

Nat. Ins. No. JH962953B Case Number

Home Address Cont. Addresses Passport/Visa Contact Tel

Email Address Marital Status User Fields Notes

- 2.1 Ensure that the correct employee has been entered by verifying the contact details within the employee's **Personal Details** tab.

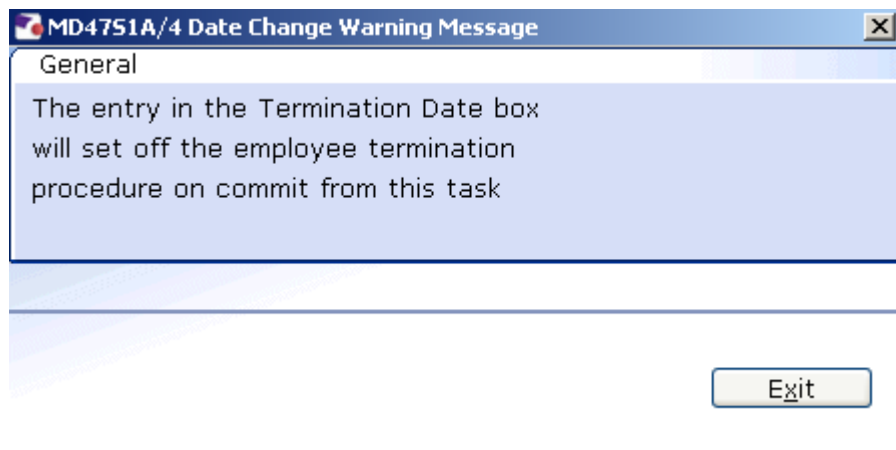
3 Employment Detail data entry screen

3.1 In the **Employment Detail** data entry screen, enter the date of the employee's last working day in the **Termination** field.

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

3.2 Press **Enter**.

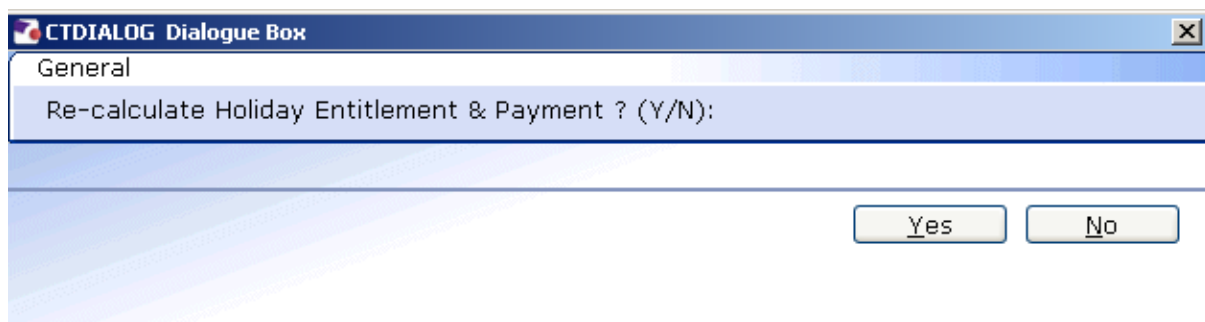
☛ If you receive the message above and the employee is a multi post holder and they are only leaving one of their posts – do not complete this task, click on OK, exit out of all screens that follow and cancel out of the task. Follow work instruction **Multi Post Leaver**.



3.3 A warning prompt will appear confirming that the employee termination procedure has been triggered.

3.4 Click **Exit**. 

3.5 A second **Dialogue Box** will appear.

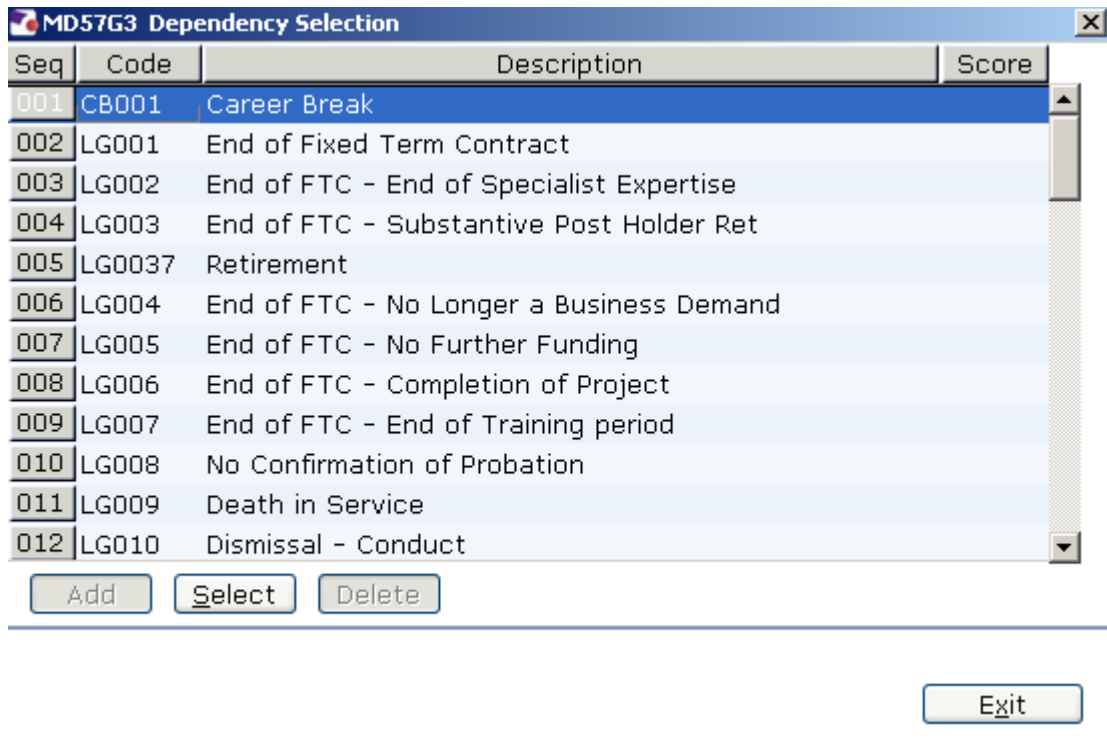


3.6 Click **No**. Payroll will enter any payments or deductions regarding Holiday Entitlement.

3.7 Window in to the field next to the **Termination** date.



3.8 Click on a reason for leaving from the **Dependency Selection**.



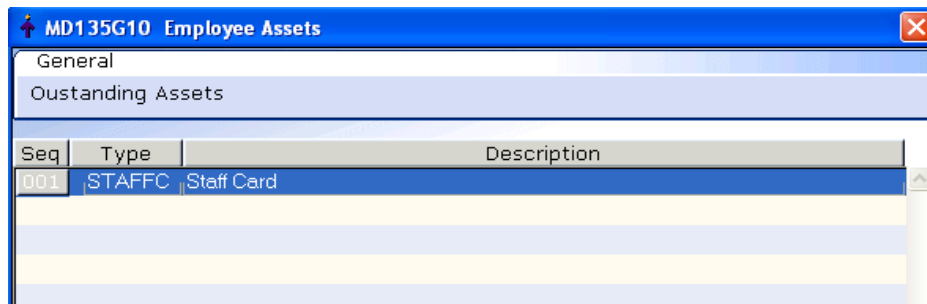
MD57G3 Dependency Selection

Seq	Code	Description	Score
001	CB001	Career Break	
002	LG001	End of Fixed Term Contract	
003	LG002	End of FTC - End of Specialist Expertise	
004	LG003	End of FTC - Substantive Post Holder Ret	
005	LG0037	Retirement	
006	LG004	End of FTC - No Longer a Business Demand	
007	LG005	End of FTC - No Further Funding	
008	LG006	End of FTC - Completion of Project	
009	LG007	End of FTC - End of Training period	
010	LG008	No Confirmation of Probation	
011	LG009	Death in Service	
012	LG010	Dismissal - Conduct	

Buttons: Add, Select, Delete

Exit

3.9 Enter through **all** the remaining fields on the **Employment Detail** screen.

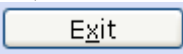


MD135G10 Employee Assets

General

Outstanding Assets

Seq	Type	Description
001	STAFFC	Staff Card

3.10 If the screen above appears, this is a warning that the employee has assets on their record, click on **Exit** .

Task - Leaver/Undo Leaver - Termination Options


Session Edit View Process Tools Display Help

Termination Options


General

Fixed P/E Automatically Closed	<input type="button" value="Y"/>
View Fixed PE Before Update	<input type="button" value="N"/>
View Fixed PE After Update	<input type="button" value="N"/>
Temp P/E Automatically Closed	<input type="button" value="N"/>
View Temp PE Before Update	<input type="button" value="N"/>
View Temp PE After Update	<input type="button" value="N"/>
Training Automatically Closed	<input type="button" value="Y"/>
View Training Before Update	<input type="button" value="N"/>
View Training After Update	<input type="button" value="N"/>
Terminate Clocking Details	<input type="button" value="Y"/>
Set Operator Obsolete	<input type="button" value="Y"/>

Enter "Y" to view the fixed pay elements after the update

3.11 Click **Continue**  to move through the **Termination Options** screen (there is no need to tab through the screen's fields).

3.12 You will be returned to the **Employment Detail** screen.

3.13 Click on **Next** .

4 Post holding History data entry screen

Seq	Start	End Date	Post	M	Status	N	Dtls	Summary
001	03/01/2006	30/04/2010	JF07002066	Y	PS002	N	Y	Summary

Add Change Delete Expand

Pseudo-Sequence Number for Index Paging

- ① This screen will show the historical posts that the employee has held. Their current post should now have an end date against it.

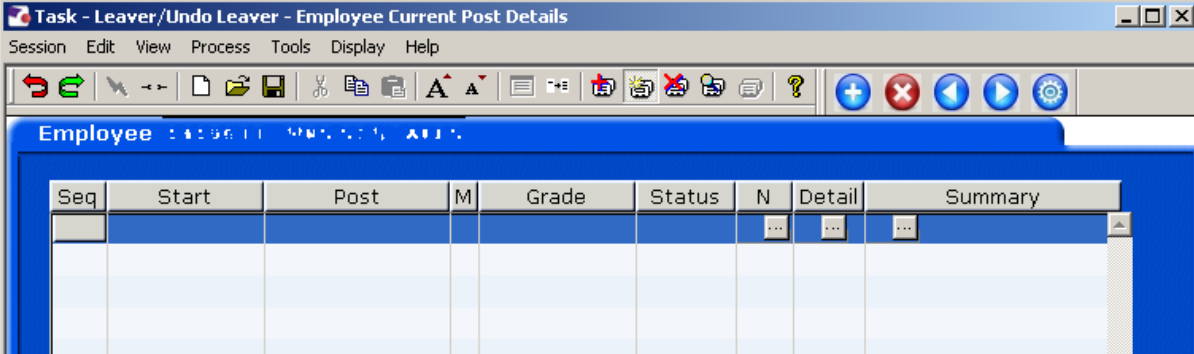
4.1 Click on **Next**.



5 Current Post Holding data entry screen

- 5.1 Check the **Current Post Holding** screen. If you have set up a leaver whose leaving date was in the past, the employee's post should have been removed from this screen. If you have set up a leaver whose leaving date is in the future, the post (s) will remain until this date has elapsed.

e.g. Leaving date in the past ...



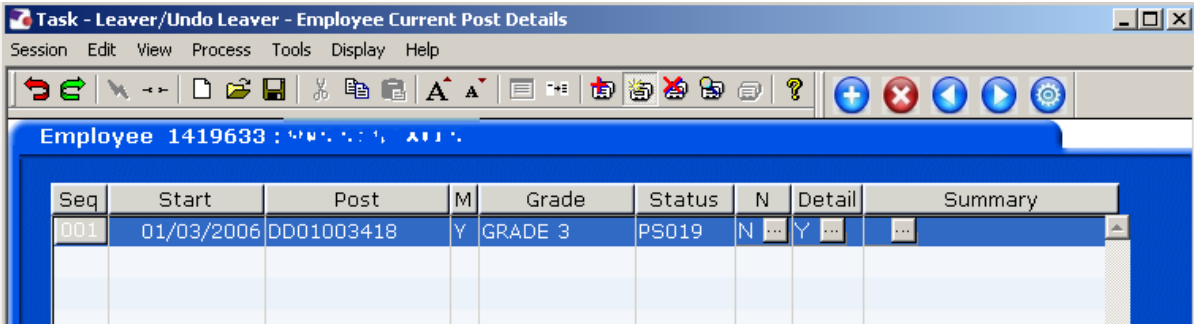
Task - Leaver/Undo Leaver - Employee Current Post Details

Session Edit View Process Tools Display Help

Employee 1419633 : 01/03/2006 : 01/03/2006 : 01/03/2006

Seq	Start	Post	M	Grade	Status	N	Detail	Summary

e.g. Leaving date in the future...



Task - Leaver/Undo Leaver - Employee Current Post Details

Session Edit View Process Tools Display Help



Employee 1419633 : 01/03/2006 : 01/03/2006 : 01/03/2006

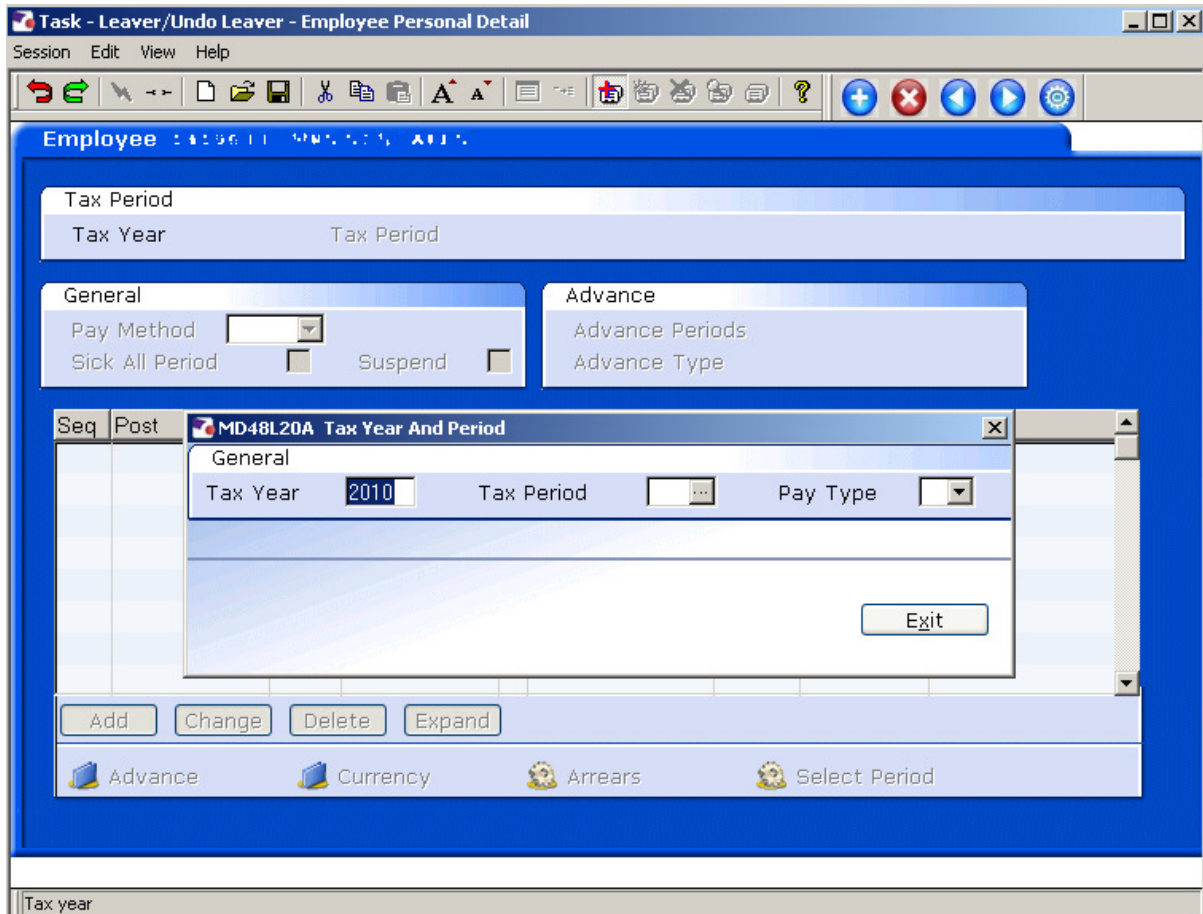
Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/03/2006	DD01003418	Y	GRADE 3	PS019	N	Y	...

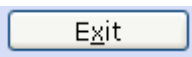
- 5.2 Click on **Next**.



6 Temporary Pay Elements data entry screen

- ① If the employee is not receiving any temporary pay elements on leaving then click on **Exit**  and click on **Next** 



- 6.1 Only complete this screen if the leaver will be receiving any 'one off' payments or deductions on leaving the University.
- 6.2 In the **Tax Year** field, enter the tax year the employee will receive this payment/deduction.
- 6.3 In the **Tax Period** field, enter the tax period the employee will receive this payment/deduction e.g. August = 05, September 06.
- 6.4 Press **Enter**, this will populate the **Pay Type** field with **M** for Monthly.
- 6.5 Click on **Exit** .

Tax Period	
Tax Year	2007
Tax Period	05

General		Advance	
Pay Method	<input type="text"/>	Advance Periods	
Sick All Period	<input type="checkbox"/>	Suspend	<input type="checkbox"/>
		Advance Type	

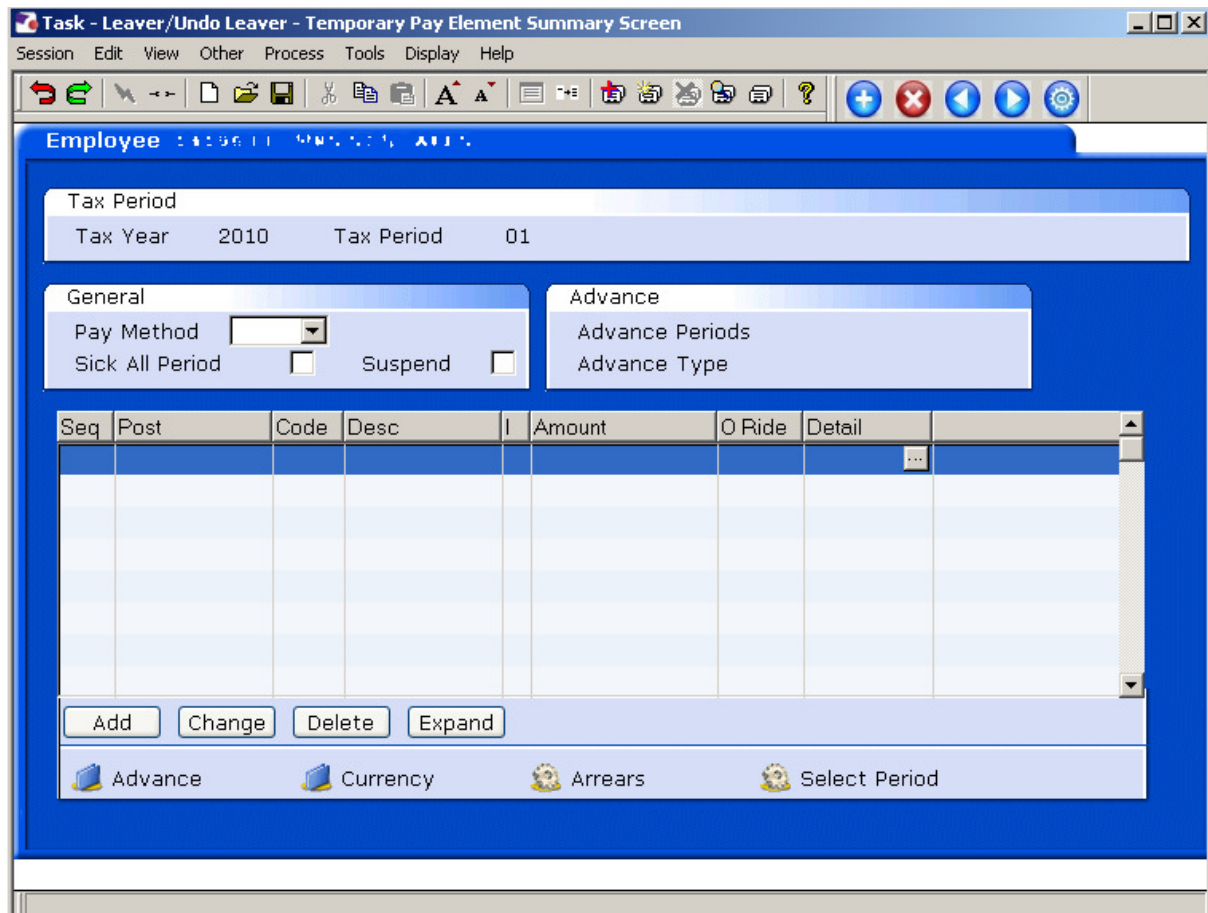
6.6 Click on the drop down in the **Pay Method** field and select the payment method.

Tax Period	
Tax Year	2010
Tax Period	01

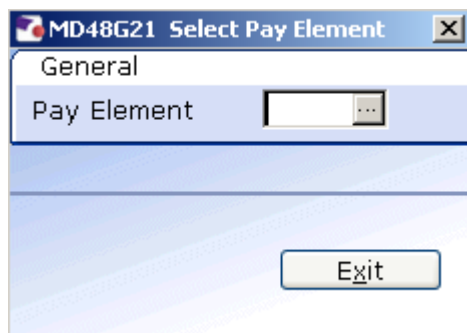
General		Advance	
Pay Method	<input type="text"/>	Advance Periods	
Sick All Period	<input type="checkbox"/>		

Seq	Post	Code	Desc	Long Description
		BACS	BACS	Bankers Automated Clearing Service
		CASH	Cash	Cash
		CHEQUE	Cheque	Cheque
001	EMPLOYEE	CRXFER	Cr.Trans.	Credit Transfer
002	EMPLOYEE	EFT	EFT	Electronic Funds Transfer
003	EMPLOYEE	FORPAY	For.Pay	Foreign Currency Payments
		GIRO	Girocheque	Girocheque
		MANCHQ	Man Cheque	Manual Cheque
		SWIFT	Swift	Swift

6.7 Press **Enter** 3 times.



6.8 Click on **Add** 



6.9 Window into the **Pay Element** field.

Seq	Code	P or D	Type	Short Desc	Long Description
0001	0001	D	N	Tax Paid	Tax Paid
0002	0010	D	NI	NI C/I	NI Contracted In
0003	0011	D	NI	NI A Saved	Non-Directors A Rate NI
0004	0020	D	NI	NI Wfe C/I	NI Wife Contracted In
0005	0021	D	NI	NI B Saved	Non-Directors B Rate NI
0006	0025	D	NI	NI CI Def.	NI Contracted in (Deferred)
0007	0026	D	NI	NI C Saved	Non-Directors C Rate NI
0008	0030	D	NI	NI Pen C/I	NI Pensioner Contracted In
0009	0031	D	NI	NI C Saved	Non-Directors C Rate NI
0010	0035	D	NI	NI CO Def.	NI Contracted out (COSR) Deferred)
0011	0036	D	NI	NI D Saved	Non-Directors D Rate NI

6.10 Scroll down the list and click on the correct Pay Element. (codes 0001 – 0999 are standard ResourceLink pay elements, 1000+ are UoS specific) e.g. 1903 Voluntary Severance Pay

6.11 The pay element will appear as above, press **Enter**.

MD48G82 'N' Type Pay Element Detail

Pay Element

Pay Element Id 1000 Basic Pay

Post

Start Date

End Date

Employees Detail

Amount 2nd Currency Table ID

Cost Code

Employers Detail

Amount 2nd Currency Table ID

Cost Code

Exit

6.12 Window into the **Post** field.

Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	DD01003418	System Sup	01/03/2006			Y

6.13 Click on the Post that this Payment/Deduction relates to.

6.14 Press **Enter**.

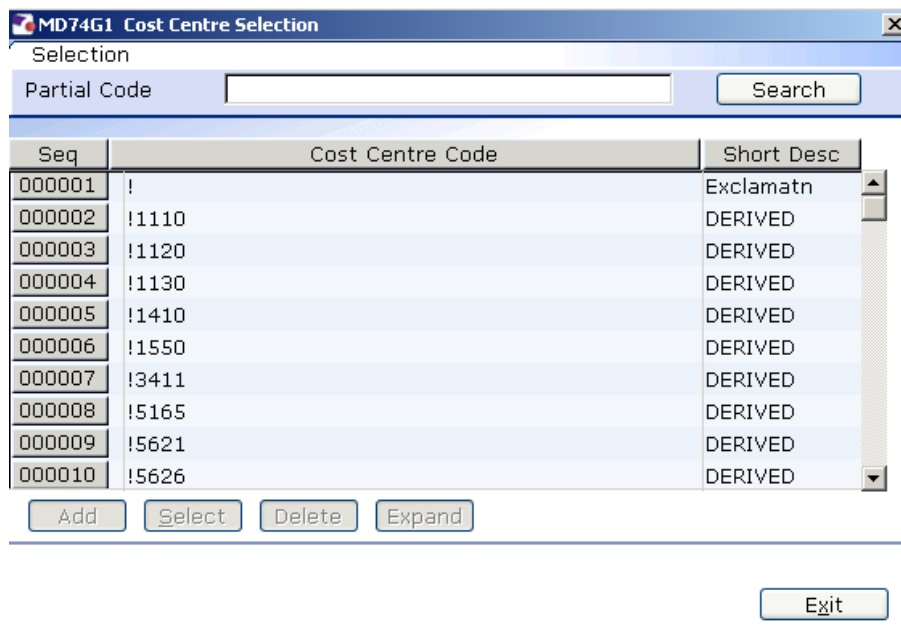
6.15 The **Start Date** field will populate with the Start date of the Tax Period entered at point 6.3.

6.16 Press **Enter** to move past the **End Date** field.

6.17 In the **Amount** field, enter the total amount of the Payment/Deduction.

6.18 Press **Enter**.

6.19 Window into the **Cost Code** field.



MD74G1 Cost Centre Selection

Selection

Partial Code Search

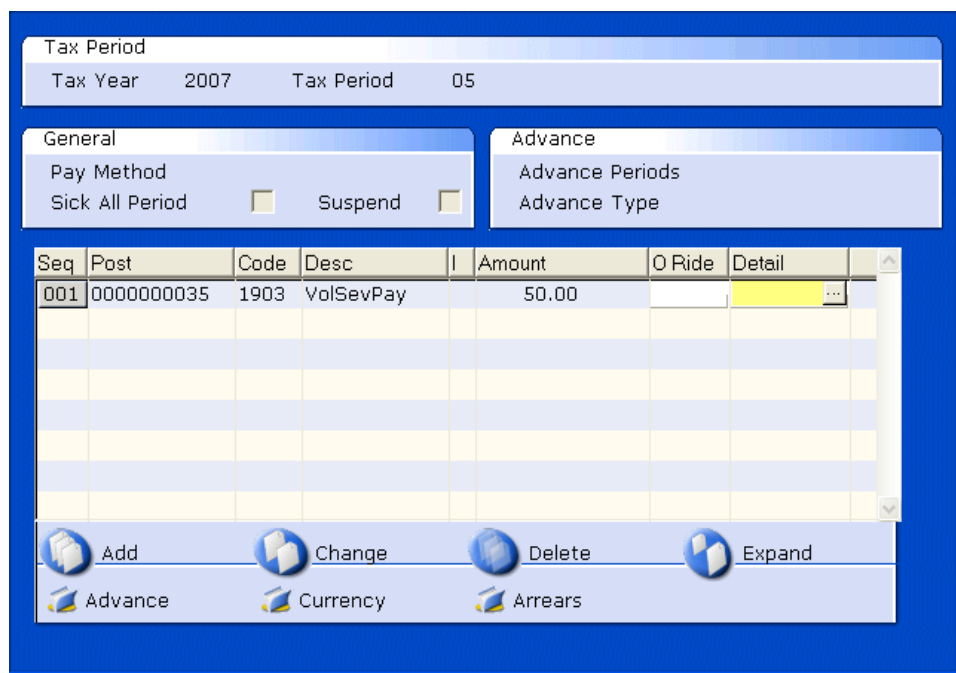
Seq	Cost Centre Code	Short Desc
000001	!	Exclamatn
000002	!1110	DERIVED
000003	!1120	DERIVED
000004	!1130	DERIVED
000005	!1410	DERIVED
000006	!1550	DERIVED
000007	!3411	DERIVED
000008	!5165	DERIVED
000009	!5621	DERIVED
000010	!5626	DERIVED

Add Select Delete Expand

Exit

6.20 Scroll down the list and click on the correct Cost Code for the Payment/Deduction.

6.21 Press **Enter**.



Tax Period

Tax Year 2007 Tax Period 05

General

Pay Method

Sick All Period ☐ Suspend ☐

Advance

Advance Periods


Advance Type

Seq	Post	Code	Desc	I	Amount	O Ride	Detail
001	0000000035	1903	VolSevPay		50.00		...

Add Change Delete Expand

Advance Currency Arrears

6.22 The Payment/ Deduction for that period will now appear on the screen, to add other payments/deductions click on **Add** and repeat the process.

6.23 When complete, click on **Next** .

7 Holiday Entitlement data entry screen.

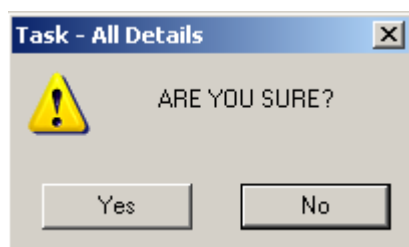
- ① In order to work out the employee's actual entitlement up until their leaving date, the following instructions must be completed for this screen:

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/10/2009	30/09/2010	167.5	0.00	0.0	161.00	6.50
002	01/10/2008	30/09/2009	24.0	0.00	0.0	24.00	0.00
003	01/10/2007	30/09/2008	27.0	0.00	0.0	27.00	0.00

Buttons: Add, Change, Delete, Expand

Work Pattern

- 7.1 Make a note of the **Start Date**, **Entitlement** and **Taken** fields for the current holiday entitlement.
- 7.2 **Delete** the current holiday entitlement row.



- 7.3 Click on **Yes**.

- 7.4 Click on **Add**. 

- 7.5 Enter the **Start Date**, noted in step 7.1 (this will normally be 01.10.XXXX).
- 7.6 Press **Enter**.
- 7.7 In the **End Date** field, enter the employee last working day (their leaving date)
- 7.8 Press **Enter**.
- 7.9 The **Entlmnt** field will auto calculate the new holiday entitlement for up until they leave.
- 7.10 Press **Enter**.
- 7.11 In the **Extra** field, enter the **minus** figure of how much leave had already been taken in the current holiday year, e.g. -10.
- 7.12 The **Remain** field will calculate how much entitlement is remaining/overspent.

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	02/11/2006	01/07/2007	20.0	0.00	17.0-	0.00	3.00

- ☛ If there are any payment of deductions that need to be made relating to holiday entitlement, these will be entered onto the system by Payroll. Please email Payroll to inform them.

- 7.13 Click on **Next** .


9 Fixed Pay Elements data entry screen

Seq	Post	Code	Desc	E	Start	Period	Amt	A	D	M	S
001	DD01003418	1000	Basic Pay	E	01/06/2010	1906.58		N			
002	DD03006231	1000	Basic Pay	*	01/05/2010	1797.08		N			

Buttons: Add, Change, Delete, Expand

Currency

Pseudo-Sequence Number for Index Paging

9.1 Ensure that an asterisk appears in the **Pay Element** row . This indicates that there is an end date against the **Basic Pay** for when the employee leaves.

9.2 Click on **Save**

CTCONFIRM Confirm Action

General

Are you sure you want to Save?

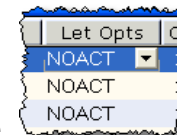
Yes No

9.3 Click on **Yes**.

10 Standard Letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit



10.1 Click in the **Let Opts** field of the letter you want to produce.

10.2 Click on the drop down.

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

10.3 Click on **MERGE Immediate print with manual changes**.

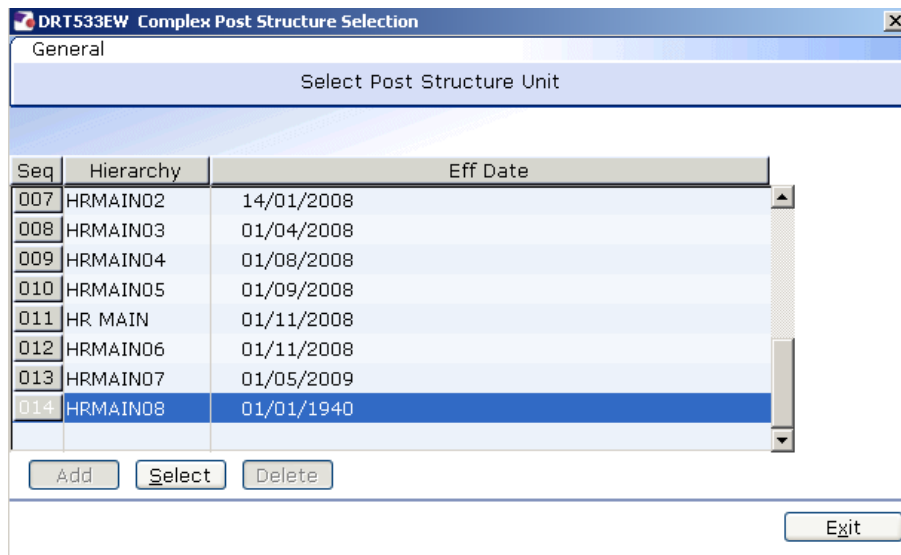
10.4 Click on **Exit**

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/04/2010			
002	DD00-VISIT	01/04/2010	30/04/2010		Y
003	DD01003418	01/06/2010			Y
004	DD03006231	01/05/2010	31/05/2010		Y
005					
006					
007					
008					
009					

Buttons: Add, Select, Delete, Exit

10.5 If there is more than 1 Post Holding ending on the same day, ensure you select the post for which a letter has not yet been produced.

10.6 Click on **Select** 



DRT533EW Complex Post Structure Selection

General

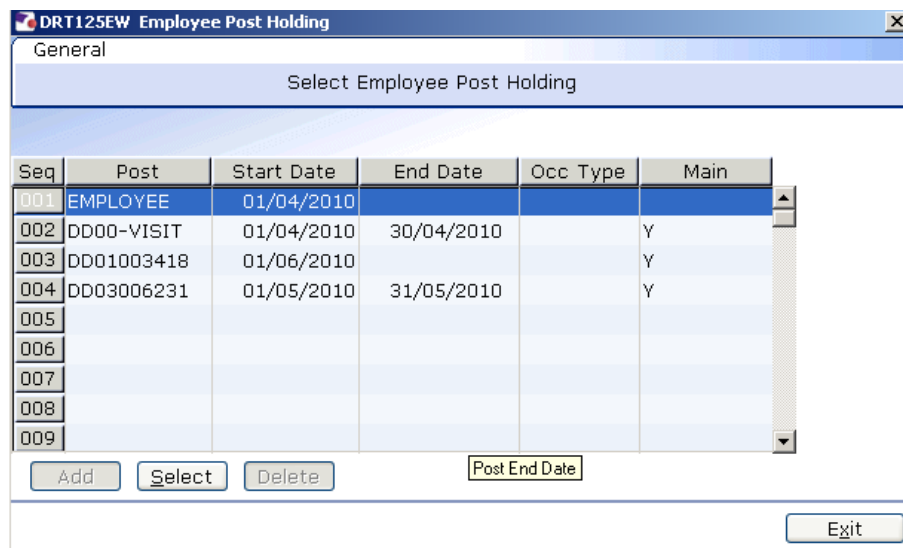
Select Post Structure Unit

Seq	Hierarchy	Eff Date
007	HRMAIN02	14/01/2008
008	HRMAIN03	01/04/2008
009	HRMAIN04	01/08/2008
010	HRMAIN05	01/09/2008
011	HR MAIN	01/11/2008
012	HRMAIN06	01/11/2008
013	HRMAIN07	01/05/2009
014	HRMAIN08	01/01/1940

Add Select Delete

Exit

10.7 Click on **Select** 



DRT125EW Employee Post Holding

General

Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/04/2010			
002	DD00-VISIT	01/04/2010	30/04/2010		Y
003	DD01003418	01/06/2010			Y
004	DD03006231	01/05/2010	31/05/2010		Y
005					
006					
007					
008					
009					

Add Select Delete Post End Date

Exit

10.8 If there is more than 1 Post Holding ending on the same day, ensure you select the post for which a letter has not yet been produced.

10.9 Click on **Select** 

The screenshot shows a Windows-style dialog box titled "MD109G3 Enter Pop Up Field Contents". It features a table with two columns: "Seq" and "Pop Up Prompt". The table contains six rows of data. Below the table are three buttons: "Add", "Change", and "Delete". At the bottom right of the dialog is an "Exit" button.

Seq	Pop Up Prompt
001	Please enter the fte & as shown on RL
002	Enter whether full or part time
003	please enter amount/no of points
004	Enter name contact Pers Asst /Recr Asst
005	Employee to report to (building no):
006	Employee to report to (room no):

Buttons: Add, Change, Delete, Exit

10.10 Click in the first row and enter the signatory's job title

10.11 Click in the second row and enter the signatory's name

10.12 Click in the third row and enter the signatory's telephone number.

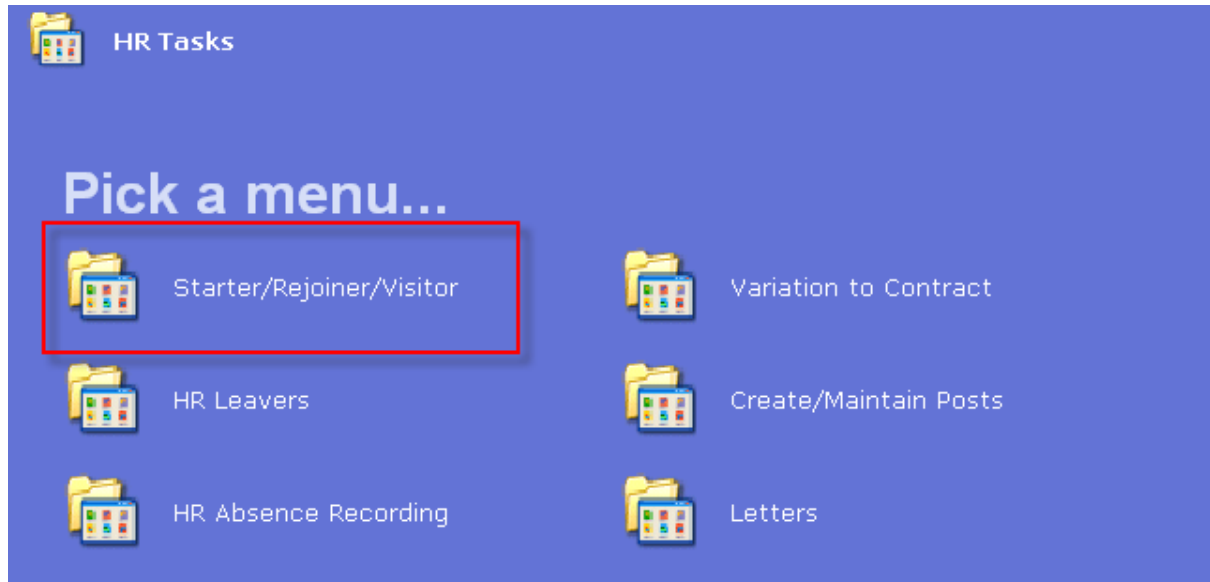
10.13 Click on **Exit**



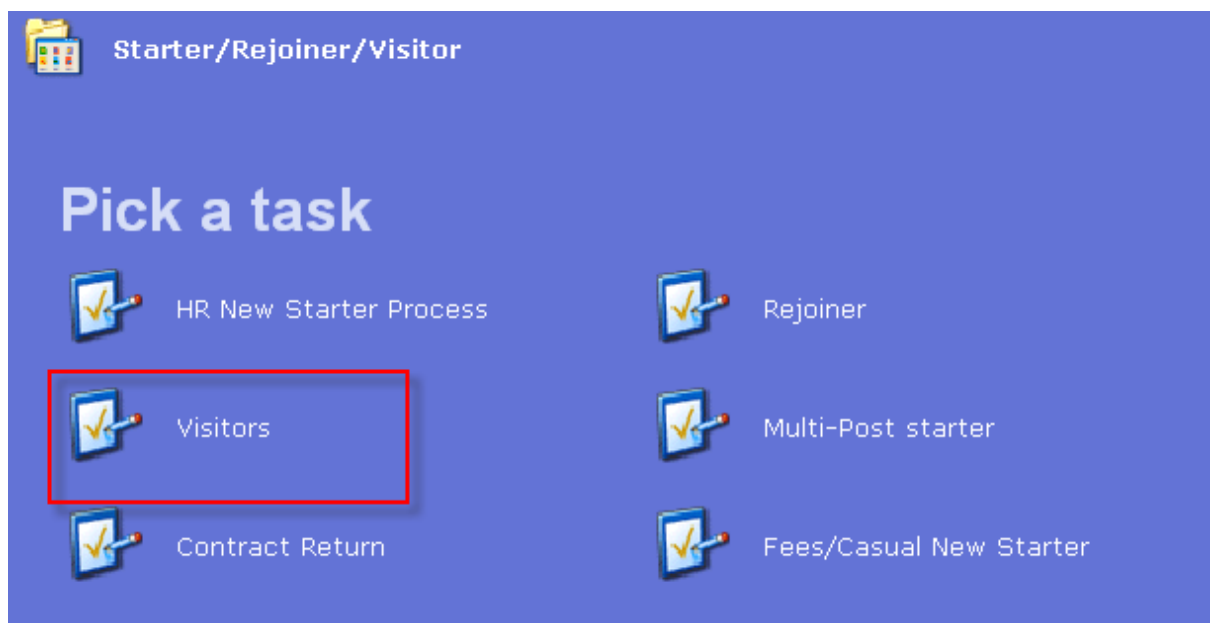
10.14 The letter will generate in Word and can be update where required then printed.

11 Setting up the Employee as a Visitor

11.1 HR Tasks > Starter/Rejoiner/Visitor



11.2 Starter/Rejoiner/Visitor > Visitor



The **Employee Selection Screen** will be displayed if there is nobody selected in the Person Work List.

- ① Before you click on the Visitor task, ensure the person is already selected in the Person Work List.

Task - Visitors - Employee Selection Screen

Employee | Other Numbers | Structure | Saved List | Employment

Match: ☒ Exact ☐ Partial

Employee Number:

Surname: Initials:

Sex: Nat. Ins. No.:

Current Employee: As at Date:

Previous Surname:

Known As:

Surname	Inits	Title	Emp Number	National ID Number	Start Date	Force

Enter an Employee Number

- ☛ If you have already selected the person (the visitors's past personnel number) in the **Person Work List** you will not see this screen and you will move directly into the task. If you do see this screen you will need to enter the persons original personnel number into the **Employee** field and click on **Select**.

11.3 The screen below should appear to highlight to the user that this employee has left the University.



11.4 Click on **OK**.

11.5 The Personal Details screen should already be completed, check and update fields where necessary

11.6 Click on **User Fields**  User Fields

Field Label	Field Contents	Description
Unique Identifier		
Pay Point		
Trade Union Opt Out		
Research Passport ID		
Res Passport Expiry		

11.7 Click on **Pay Point** and on the drop down arrow in the field. The following dialog box will appear.

MD37G4A Narrative Table Search

Search

Narr Code

Seq	Code	Desc	Long Description
-----	------	------	------------------

Exit

11.8 Press the **ENTER** key to display the list of available **Pay Points**.

MD37G4A Narrative Table Search

Search

Narr Code


Seq	Code	Desc	Long Description
001	00	00	Post or Collect
002	02	02	Maternity
003	03	03	Living Abroad
004	03C	03C	Living Abroad + Cheque
005	04	04	Place in Personal File
006	05	05	Send out every December
007	06	06	Send out every June and December
008	07	07	Leaver - Send with P45
009	09	09	Pensionable Fee Payment

Add Select Delete

Exit

11.9 Click on the required Pay Point.

11.10 Click on **Exit**.

11.11 Click on  to move to the next data entry screen.


12 Relationship Summary data entry screen

12.1 Click on **Add** to enter the details of the visitor's next of kin.

12.2 Click on the down arrow in the **Code** field and select **NOK**.

12.3 **ENTER** past the **Emp No.** field.


12.4 **Window in** to the **Dets** field and complete the known personal details for the visitor's next of kin.

- 12.5 Click on the **Address** and **Telephone** fields to enter this information.
- 12.6 Click on **Exit**.
- 12.7 If you wish to add more than one next of kin contact repeat the steps in **Error! Reference source not found.**
- 12.8 Click on  to move to the next data entry screen.

13 Employment Detail data entry screen

- 13.1 Click in the **Current Start** field and the date from which their visit commences.
- 13.2 In the adjacent field to **Current Start**, window in and select **SG003 – Visitor Appointment**.

Seq	Code	Description	Score
001	LG0037	Retirement	
002	LG037	Visitor to Staff	
003	PJL004	Promotion	
004	PJL005	Internal Transfer (in dept)-Restructure	
005	PJL006	Int. Transfer (in dept)-Breakdown in Rel	
006	PJL007	Internal Transfer (in dept) - Other	
007	PJL008	Int. Transfer (in dept)-Flex. Working	
008	PJL009	Internal transfer (out dept)-Restructure	
009	PJL010	Int.Transfer (out dept)-Breakdown in Rel	
010	PJL011	Internal Transfer (out dept) - Other	
011	PJL012	Secondment	
012	PJL013	Acting Up	


- 13.3 Press **Enter**.
- 13.4 Click on  to move to the next data entry screen.


14 Post Holding History data entry screen

Seq	Start	End Date	Post	M	Status	N	Dtls	Summary
001	01/09/2006	30/09/2009	DD00-VISIT	Y	PS009	N	Y	
002	28/09/1998	31/08/2006	9999999999	N	PS009	N	Y	

Add Change Delete Expand

Pseudo-Sequence Number for Index: Paging CHANGE NUM MD4757

-  This screen will list each time the visitor has visited the University, with the start and end dates of each visit.

14.1 Click on  to move to the next data entry screen.

15 Current Post Holding data entry screen

- 15.1 Click on **Add** to enter the Current Post Holding data for the visitor.
- 15.2 Type in the **Start Date**.
 - ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.
- 15.3 Press **ENTER**.
- 15.4 Type the Visitor Post Number (for the appropriate school/dept) into the **Post** field.
- 15.5 Press **Enter**.
 - ❗ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.
- 15.6 Click in the **Details** field and **Window in**.

MD47L3 Employee Post Holding Details

Detail

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Start 31/03/2010 SG001 New Appointment

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

15.7 Click in **Post Main Flag** field and Type **Y**.

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

MD47L3 Employee Post Holding Details

Detail

Post	KW04-VISIT	Visitor
Job	UNPAIDVIS	Unpaid Visitor
Employee Grade		
Post Grade	DEFAULT	SYSTEM DEFAULT GRADE

General Conditions Misc Grade Contract

Service Cond ID UNPAIDVIS unpaid visitor

Source JOB

Position Status

Occupancy

Wk Pattern DEFAULT Default Work Pattern

Source POST

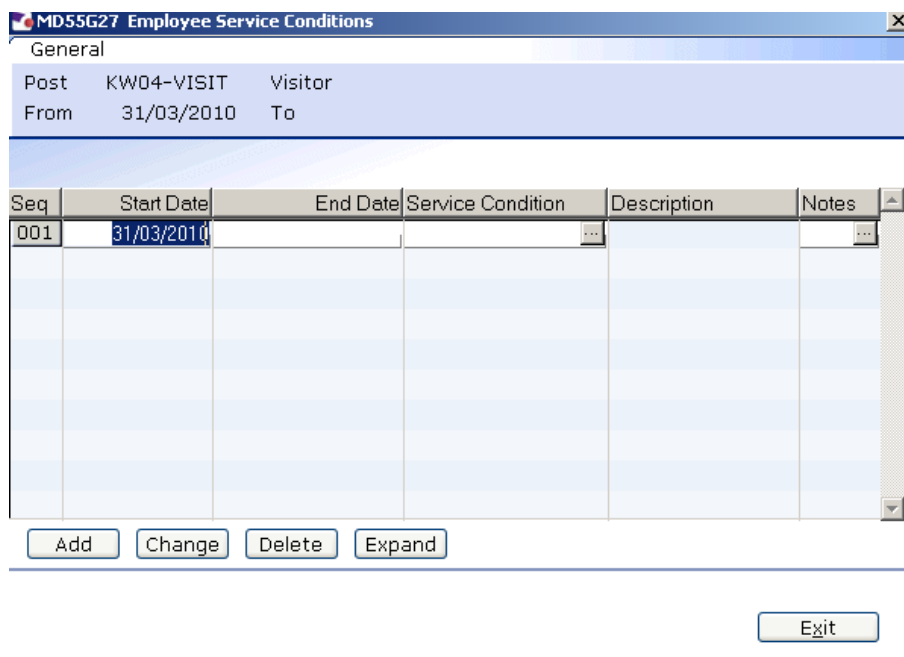
Contract Hours 0.00 Weekly Hours 00.0000

Source JOB FTE 1.0000

T/S Template Perf Management User Fields Notes

Salary Planning Exit

15.9 Window in to the **Service Cond ID** field



MD55G27 Employee Service Conditions

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	31/03/2010	

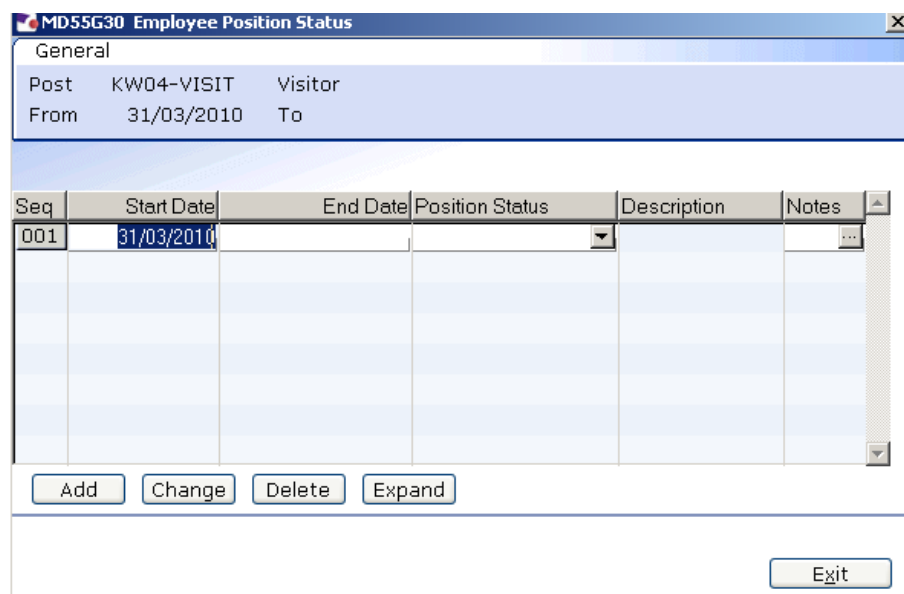
Add Change Delete Expand

Exit

15.10 Click on **Add** and press **Enter** three times to pull through the Service Conditions. The service condition should be **UNPAIDVIS**.

15.11 Click **Exit**.

15.12 **Window in the Position Status Field.** The following screen will appear:



MD55G30 Employee Position Status

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	31/03/2010		▼		...

Add Change Delete Expand

Exit

15.13 Click on **Add**.

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

Code	Desc	Long Description
PS003	TTOP	Term Time Only - Permanent
PS004	TTOFT	Term Time Only - Fixed Term
PS005	FTFT	Full Time - Fixed Term
PS006	PTFT	Part Time - Fixed Term
PS007	TBANK	Temp Bank
PS008	CASUAL	Casual Staff
PS009	VISITOR1	Visitor - Requires System Access
PS010	VISITOR2	Visitor - No System Access

- 15.15 Select either **VISITOR1** or **VISITOR2** (depending on if they requires access to systems).
- 15.16 Press **Enter** to move through the remaining fields and click **Exit**.
- 15.17 Leave the **Wk Pattern** field as Default.
- 15.18 Leave the **Contract Hours** field as 0.
- 15.19 Click on to the **Misc** tab.

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

- 15.21 Click on **Add** and press **Enter** twice.
- 15.22 Select the location from the **Location** field drop down list.
- 15.23 Press **Enter**.
- 15.24 **Window in** to the **Reason** field and select **SG003 Visitor Appointment**.
- 15.25 Press **Enter**.
- 15.26 Click **Exit**.
- 15.27 Click on the **Grade** tab.

MD47L17 Employee Location

General

Post KW04-VISIT Visitor
From 31/03/2010 To

Seq	Start Date	End Date	Location	Description	Source	Reason	Notes
001	31/03/2010		HIGHFIELD				

Add Change Delete Expand

Exit

Do not complete this tab.

- 15.28 Click on the **Contract** tab.

General Conditions Misc Grade Contract


Redeployment Reason
Projected End Date
Contract Number
HESA Indicator

T/S Template Perf Management User Fields Notes

Exit

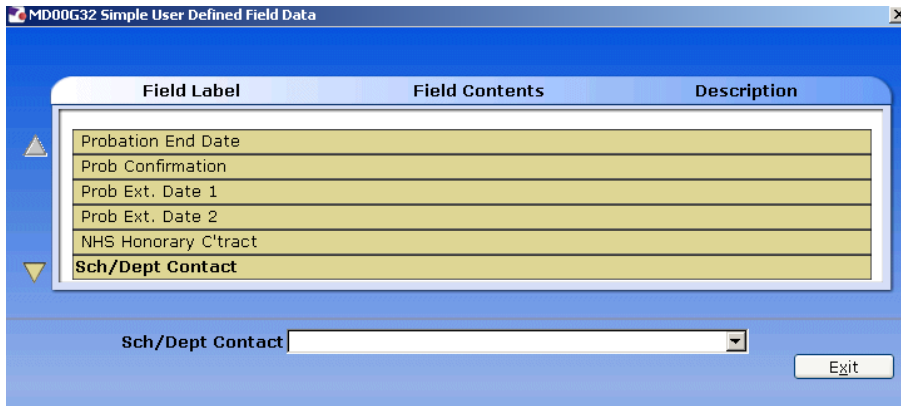
- 15.29 Click in the **Projected End Date** field.

15.30 Enter the date the visit is expected to finish.

15.31 Click on the **User Field** icon at the bottom of the screen  User Fields

15.32 Click in the **School/Dept Contact** field

15.33 Type the name of the **Contact**



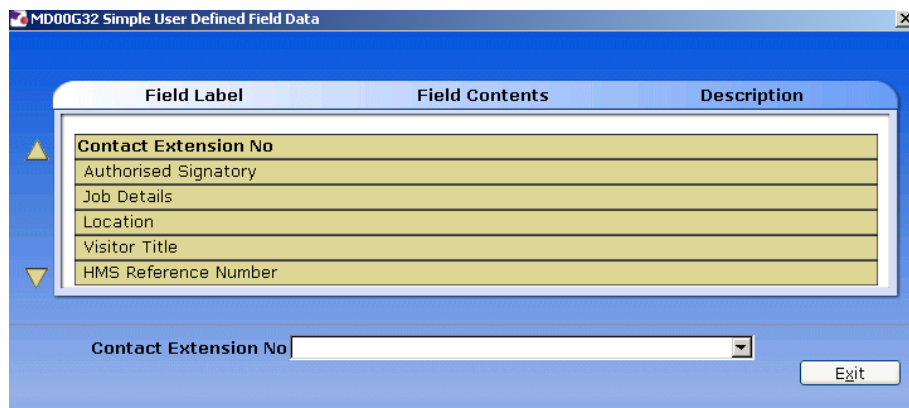
Field Label	Field Contents	Description
Probation End Date		
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Sch/Dept Contact

Exit

15.34 Press **Enter**

15.35 Type the **Contact Ext No** in the highlighted field



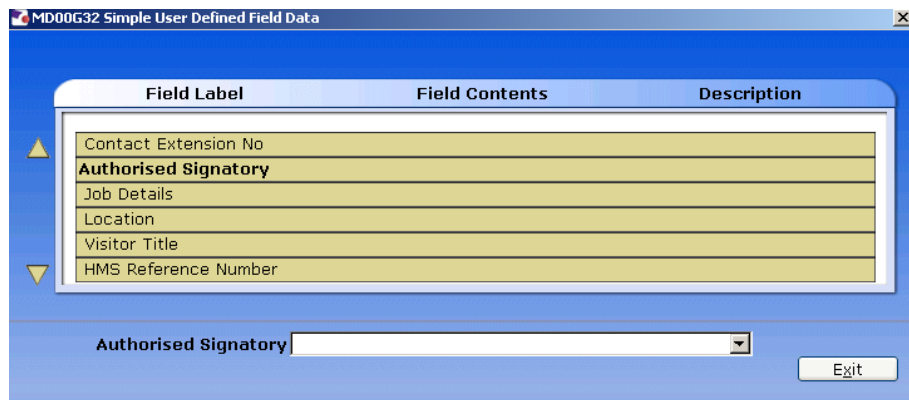
Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

Contact Extension No

Exit

15.36 Press **Enter**

15.37 Type the name of the **Authorised Signatory** in the highlighted field




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

Authorised Signatory

Exit

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

15.39 Click on  to move to the next data entry screen.

16 Basic Pay Details data entry screen

Task - Visitors - Basic Pay Detail

Session Edit View Other Process Tools Display Help

Employee 2074524 : MS L LASTIC

Pay Control

Pay Group

Ctrl group

Pay Type

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

CHANGE NUM MD4952

- 16.1 Check that the **Pay Group** is set as **PSUB5**.
- 16.2 If not, window in and select **PSUB5**.
- 16.3 Ensure the **Pay method** is set as **Cheque**.
- 16.4 There are no more tabs to complete, click on **Save**.

17 Standard letters

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

Buttons: Add, Change, Delete, Expand, Exit

- 17.1 Click in the **Let Opts** field of the standard letter you want to produce
- 17.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

Seq	Letter	Ver	Description	Let Opts	Copies
001	EMERITUS	001	Emeritus Professor	NOACT	1
002	WISEXTN	001	Visitor Extension	NOACT	1
003	VISIT-SO	001	Visitor - spin out	NOACT	1
004	VISITOR	001	Visitor	NOACT	1
005	VIS_NERC	001	Visitor NERC	NOACT	1
006	VIS_SUSU	001	Visitor SUSU	NOACT	1

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

- 17.3 Click on **Exit**.
- 17.4 Select appropriate Post

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	31/03/2010			
002	KW04-VISIT	31/03/2010			Y
003					
004					
005					
006					
007					
008					
009					

Buttons: Add, Select, Delete, Exit

17.5 Select the latest hierarchy

Seq	Hierarchy	Eff Date
001	HR MAIN	01/11/2008
002	HR MAIN	01/09/2008
003	HR MAIN	01/08/2008
004	HR MAIN	01/04/2008
005	HR MAIN	14/01/2008
006	HR MAI Post Number	01/01/1940
007	HRMAIN01	01/01/1940
008	HRMAIN02	14/01/2008
009	HRMAIN03	01/04/2008

Buttons: Add, Select, Delete, Exit

17.6 Complete the following form

Seq	Pop Up Prompt
001	Please enter name of supervisor
002	Enter whether this is a Sch/ Dept/Div
003	Please enter name of signatory
004	Please enter RA/PA's tel number

Buttons: Add, Change, Delete, Exit

- 17.7 Click in the first row and type the name of the visitor's supervisor.
- 17.8 Click in the second row and type in the if Sch/Dept/Div.
- 17.9 Click in the third row and type the signatory's name.
- 17.10 Click on the fourth row and type the signatory's telephone number.
- 17.11 Click on **Exit**.

17.12 The visitor's letter should generate in **Word** and you can print as normal.